

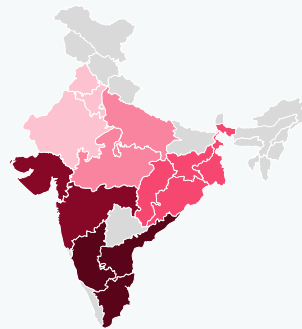


CEMENT



Ranking and Region-wise Capacity

India's Global Rank

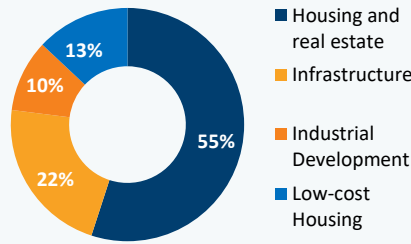


North India:	107
Central India:	63
East India:	93
West India:	63
South India:	161

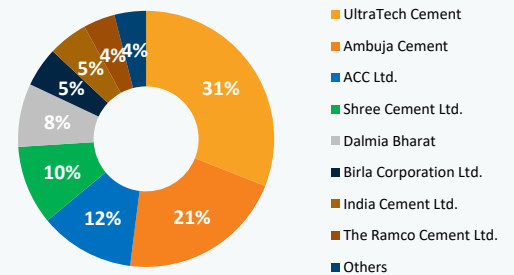


SECTOR COMPOSITION

Cement Demand In FY21

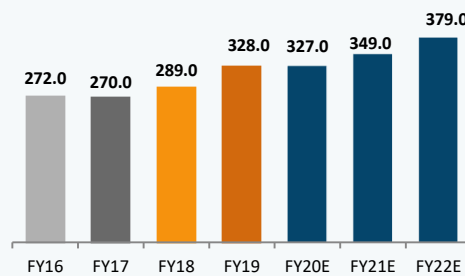


Top Cement Producers in India 2020 (Market Share)

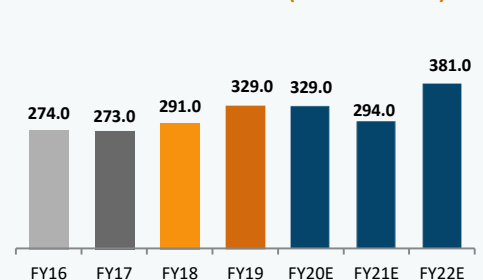


KEY TRENDS

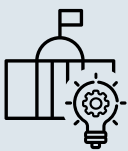
Cement Consumption (million tonnes)



Cement Production (million tonnes)



Note: F – Forecast, E – Estimated



GOVERNMENT INITIATIVES



Make in India

Pradhan Mantri Gati Shakti - National Master Plan (NMP)



Pradhan Mantri Awas Yojana



ADVANTAGE INDIA

- Robust demand:** In FY22, the cement production in India is expected to increase by ~12% YoY, driven by rural housing demand and government's strong focus on infrastructure development. The Indian cement industry is likely to add ~80 million tonnes (MT) capacity by FY24, the highest since the last 10 years, driven by increasing spending on housing and infrastructure activities.
- Increasing Investments:** FDI inflows in the industry, related to manufacturing of cement and gypsum products, reached US\$ 5.28 billion between April 2020 and June 2021.
- Long-term Potential:** Indian cement companies are amongst the world greenest cement manufacturers. With high allocation under the Union Budget 2021-22 for infrastructure, affordable housing schemes and road projects to fuel the economy, the domestic cement industry is poised for a volume surge.
- Attractive opportunities:** In October 2021, Prime Minister, Mr. Narendra Modi, launched the 'PM Gati Shakti - National Master Plan (NMP)' for multimodal connectivity. Gati Shakti will bring synergy to create a world-class, seamless multimodal transport network in India. This will boost the demand for cement in the future.