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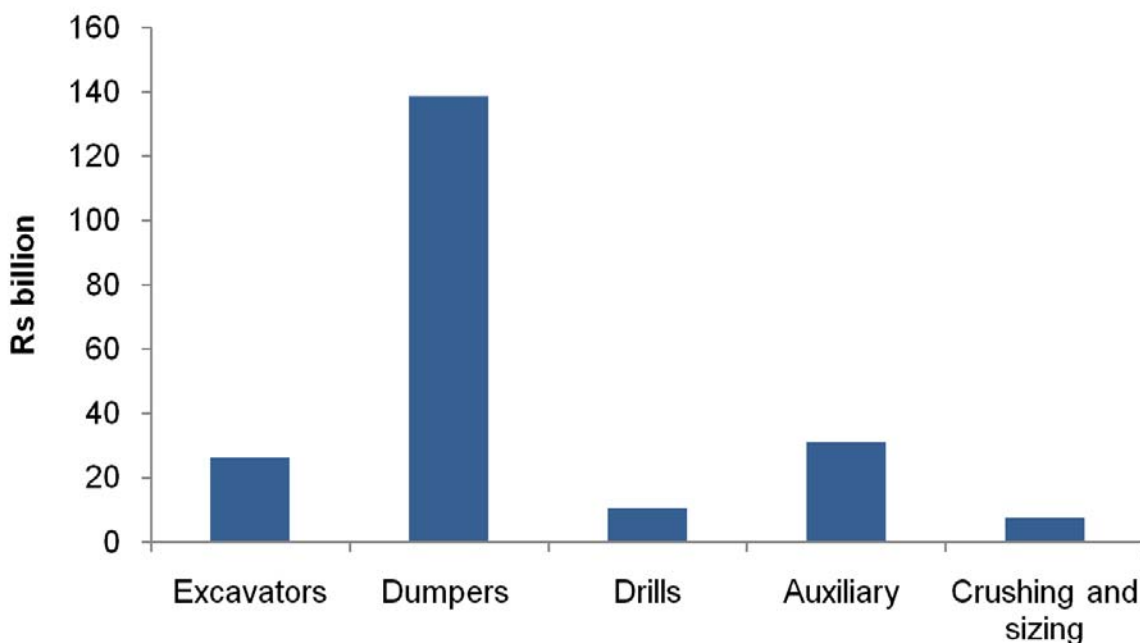
Mining Equipment Market

Market Size and Trends; Outlook and Projections (2018-22)

- ❖ Report (PDF)
- ❖ Data-set (Excel)

- The mining industry has exhibited strong growth fundamentals since 2013-14. After index of industrial production (IIP) growth of -0.6% in 2013-14, the sector remarkably recovered to a growth of 5.3% in 2016-17. During April-February period of 2017-18, the growth, however, has been subdued at 2.3%. Its contribution to the gross value added (GVA) (at constant price) has consistently hovered around 2.5-3%.
- The sector has witnessed several notable developments in the past two to three years. These include a ban on mining activity in some states (Goa, Odisha, Rajasthan), fresh auctions of erstwhile de-allocated blocks, and the introduction of policy measures such as the Draft National Mineral Policy (NMP) 2018, the Mines and Minerals (Development and Regulation) Amendment Act, 2017, the National Mineral Exploration Policy (NMEP) 2016, etc.
- Volatility in commodity prices has put increased pressure on profit margins of mining companies due to which they are laying greater emphasis on performance improvement and cost efficiencies. Although surface mining will continue to dominate in the near future, companies are exploring opportunities for underground mining due to increasing mine depths and depleting grades of existing mineral ores.
- The government's strong push to the infrastructure sector and the focus of mining companies on enhancing mining output have kept the demand for mining equipment on the rise. Meanwhile, the approval for auctioning of coal mines for commercial use by private players is also expected to allow the use of more advanced equipment and technology.

Equipment-wise Estimated Market Size in 2017-18 (Rs billion)



- However, equipment utilisation in the country is below international standards. Besides, the level of automation and IT adoption remains at a nascent stage, although some companies have started making some progress in this regard. There are several challenges that come in the way of adoption of these technologies. With incompatible and disconnected IT solutions being used in silos and most of the data generated being unused, the level of technology deployment is yet to mature.
- The market size of the mining equipment industry is expected to cross Rs 513 billion for the year 2020-21 with highest investment in dumpers, followed by auxiliary equipment and excavators.
- Going forward, a slew of factors will continue to drive the equipment demand. These include increasing trend in contract mining, higher stripping ratios, focus on reducing carbon footprint, gradual adoption of technologies, etc. Equally important would be to train personnel so that the procured equipment is put to use in an efficient manner.

Equipment-wise Projected Market Size in 2020-21 (Rs billion)

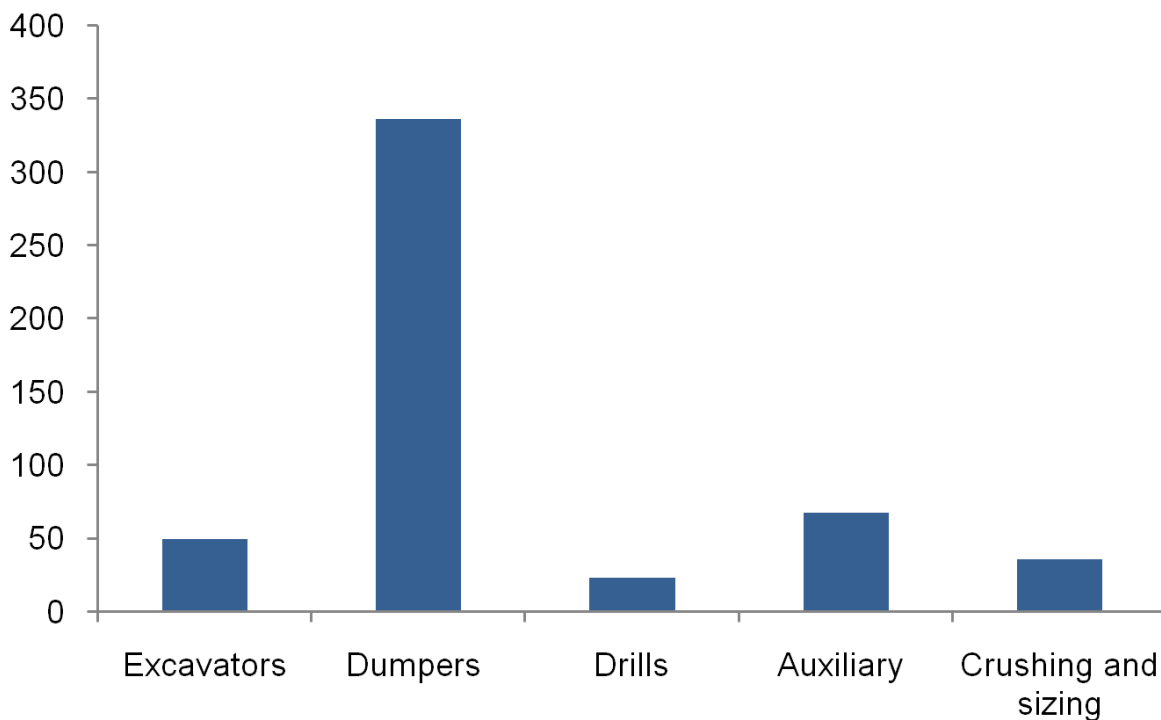


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(Each profile covers existing and planned manufacturing capacity, product portfolio, recent initiatives, financial performance, etc.)

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