



**Madhya Pradesh**

**Mining & Minerals**

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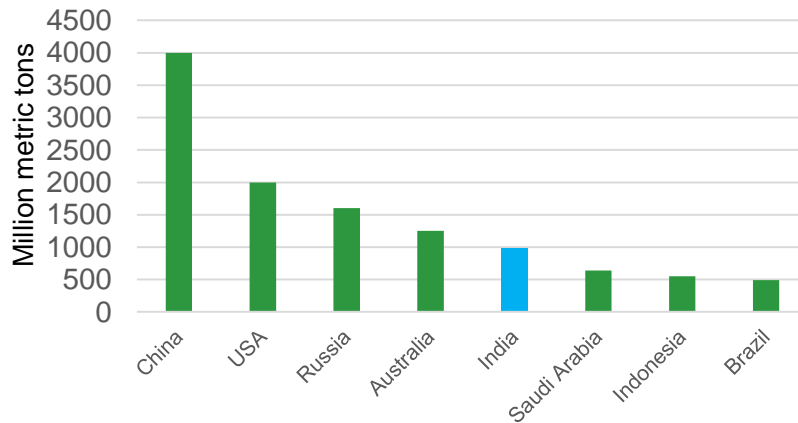
# Mining Industry: Global Scenario

## World Mining Production

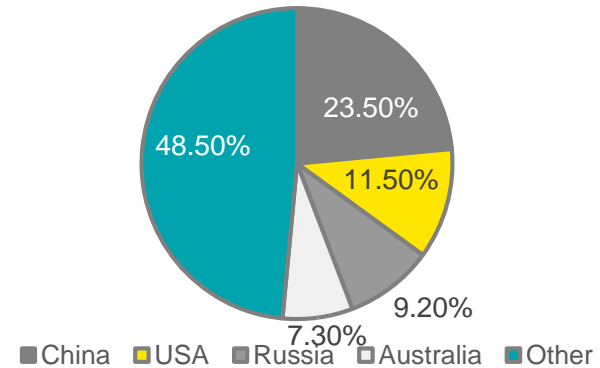
↑  
**2018 - 17.2 billion** metric tons  
**2017 - 16.9 billion** metric tons  
**1985 - 16.5 billion** metric tons

In 2018, total revenue generated by top 40 mining companies was **683 billion USD**

Largest Producer Countries 2017 (without construction mineral)



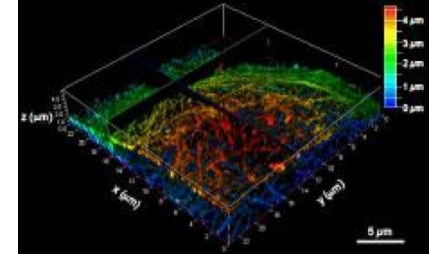
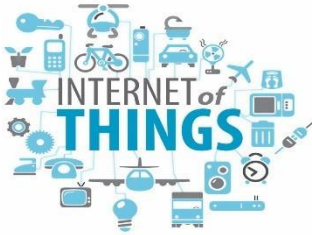
## 4 Biggest Mining Nations 2019



## Global Opportunity in Mining:

1. Significant scope for new mining capacities in iron ore, bauxite and coal as the requirement constantly rises
2. Considerable opportunities for future discoveries of sub-surface deposits.
3. Infrastructure projects to provide lucrative business opportunities for steel, zinc and aluminium producers.
4. Demand for Iron and Steel continues to be strong in support of residential and commercial building industry.
5. Apart from Europe mineral production rate growing significantly across the world

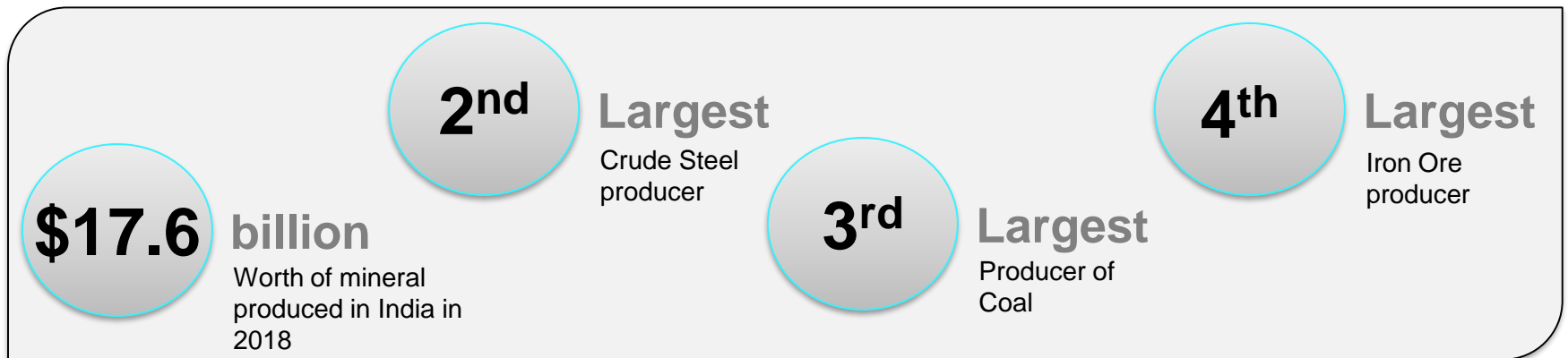
# Mining Industry: Global Scenario cont.



## ***Technology Redefining Mining:***

1. **Robotics** - Robotic devices powered by artificial intelligence can perform a range of tasks including drilling, blasting, loading, hauling, bolting mine roofs as well as ore sampling and rescuing trapped miners.
2. **Internet of Things** – Micro-electromechanical systems (MEMS) and the Internet, can potentially transform the mining industry by creating new ways of maintaining mine safety and productivity.
3. **3D imaging** - 3D imaging technologies has improved the efficacy Seismic surveys for studying the geology of potential mining areas greatly
4. **Automated drilling** - Automated and tele-operated drilling solutions can ensure mining personnel safety and improve efficiency during surface drilling operations
5. **Remote operating and monitoring centres** - The adoption of centralised systems for operating, monitoring and controlling the mining or the processing activities from a remote location has been much sought after by mining companies over the last four years in the strive for maximum efficiency, improved safety, decreased variability and better identification of performance issues.

# Mining Industry: India Scenario



## Key Highlights

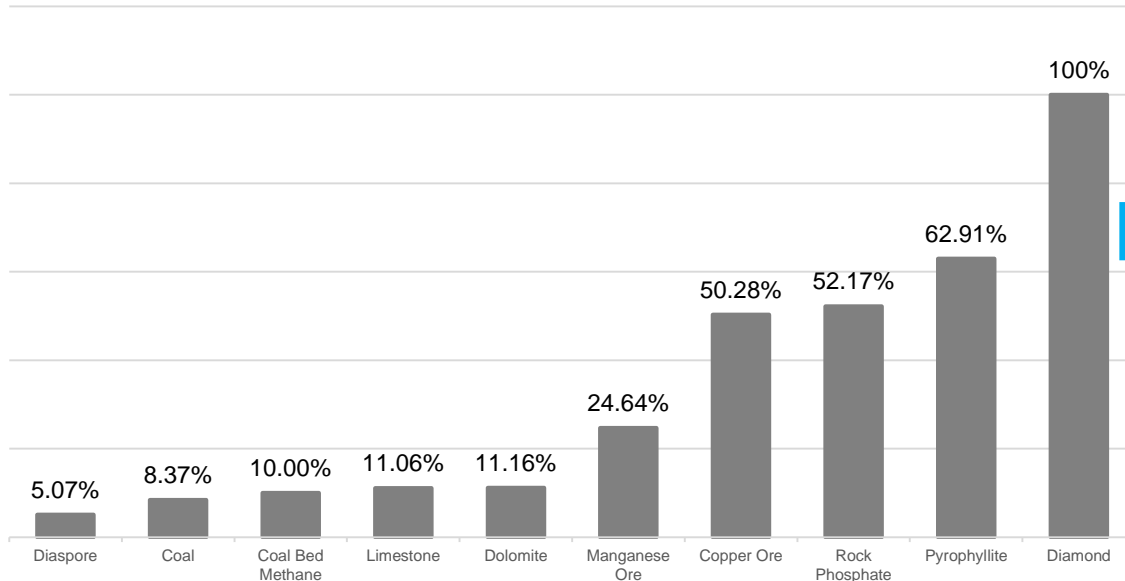
- ▶ **India produces 95 minerals**– 4 fuel-related minerals, 10 metallic minerals, 23 non-metallic minerals, 3 atomic minerals and 55 minor minerals
- ▶ Mineral production in India has surged, **achieving a CAGR of 5.72%** between 2013-14 and 2017-18E to reach US\$ 17.62 billion in 2017-18
- ▶ Estimated **1531 mines** operated in India between April 2000 and June 2018, in the metals and mining sector

## Attractive Opportunities

- ▶ **100% FDI** allowed in the mining sector and exploration of metal and non metal ores under the Automatic Route
- ▶ **Iron ore, bauxite and coal** are providing significant scope for new mining capacities
- ▶ Ministry of Steel aims to increase the steel production capacity to **300 million tonnes by 2030-31** from 134.6 million tonnes in 2017-2018
- ▶ **US\$ 14.65 billion**, cumulative FDI inflows into the metals and mining sector between April 2000 and June 2018\*

# Mining Industry: Madhya Pradesh Scenario

Percentage of Country's Reserves in M.P



**1** | 8th most productive mining state in the country

**2** | 8 major minerals are being mined in MP

**3** | State has monopoly in diamond mining

**4** | Madhya Pradesh is top producer of Copper and Manganese in the country

## Mining, growing industry in Madhya Pradesh:

- MP has the 2<sup>nd</sup> largest number of mines in the country with 197 mines
- The value of mineral production (excluding fuel & atomic minerals) in MP has increased by 17.34% during 2017-18
- State has the thickest coal seam of Asia covering Singrouli Coal Field, dist. Sidhi and near Chhindwara.
- State is optimising technology to increase process efficiency along with major players
- Mineral Resources Department, Govt. of Madhya Pradesh promoting online services – e-auction, e-procurement, e-Registration of Vehicle, Lessee/Stockist Registration, Royalty Clearance for Work's Dept., Check Lessee Registration, Verify Registered Vehicle, Submit Mining Plan
- State is promoting use of GPS/GPRS based vehicle tracking system to enhance productivity.

# Madhya Pradesh Scenario: Key Growth Drivers

## Abundant resources across the State

- Manganese - Balaghat, Chhindwada, Jabalpur
- Pyrophyllite – Chhatarpur, Tikamgarh, Shivpuri
- Rock phosphate – Chhatarpur, Jhabua, Sagar
- Limestone - Dhar, Jhabua, Neemuch, Satna, Rewa, Katni, Damoh
- Coal - Betul, Singrauli, Anoopur, Shahdol, Chhindwara, Umaria, Narsinghpur
- Diamond - Panna, Chhatarpur

## Government Support

- Cabinet Committee on Investment Promotion
- Enables fast track approvals for projects
- Sanctions special fiscal incentives and customized packages for mega projects with investment in P&M of over Rs 100 Crs
- Simple and quick online application

## Industry Scenario

- Madhya Pradesh currently has 197 mines
- State leading producer of Manganese and major producer of limestone, phosphorite copper
- Major industry players present in state – J. P. Group, Heidelberg Cement, Hindustan Copper Ltd.

## Availability of skilled labour

- Reasonably priced labour compensation
- Availability of skilled labour
- Availability of trained and well qualified Supervisors & Managers
- High employee retention record due to quality of life in Madhya Pradesh

## Institutional Support

- World class mining focused engineering technology institutes are available in the State:
- VNS Group, Bhopal
  - JNCT, Rewa
  - RGPV, Bhopal
  - AKS University, Satna
  - Aditya College of Technology and Science, Satna

## Mining allied industries

- Major Mining based industries present in State
- Cement
- Thermal Power
- Coal Asbestos Cement Sheet
- Ceramics
- Hydrated Lime
- Slate Pencil
- Flagstone cutting & polishing
- Potteries
- Refractories
- Roofing Tiles
- Marble cutting & polishing
- Granite cutting & polishing



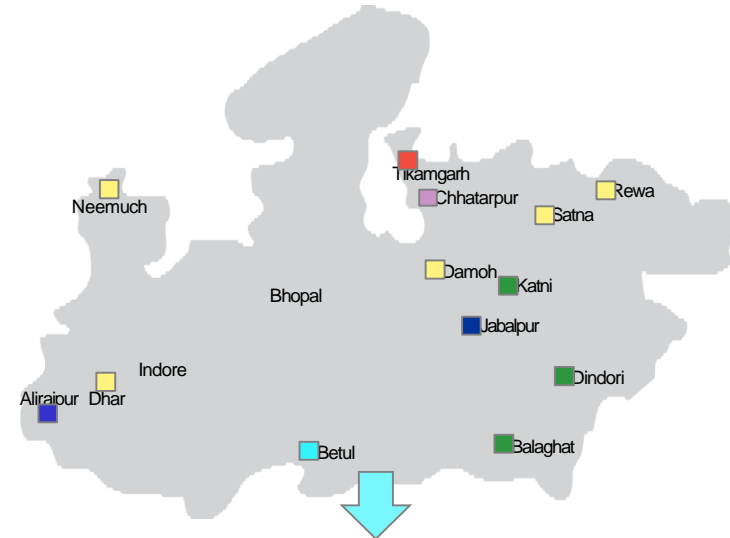
# Madhya Pradesh Scenario: Resource Availability

## Mineral Resources

Mineral	Unit Available	Quantity
Diamond	MC	28.70
Coal	MT	2767
Limestone	MT	9341.85
Dolomite	MT	2311.395
Copper Ore	MT	377.18
Iron Ore	MT	329.936
Bauxite	MT	173.388
Manganese Ore	MT	57.713
Rock Phosphate	MT	58.05
Pyrophyllite	MT	28.55
Diaspore	MT	7.561
Coal Bed Methane	BCM	114.11
<b>MC-Million Carats, MT-Million Tonnes, BCM- Billion Cubic Meter</b>		



## Mineral Sites in M.P



## Annual Mineral Production (2017-18)

Mineral	Unit Produced	Quantity
Diamond	MC	.04
Copper Ore	MT	2.32
Manganese Ore	MT	0.88
Rock Phosphate	MT	0.39
Limestone	MT	15.03
Coal	MT	92.00
Bauxite	MT	0.57
Iron Ore	MT	2.93
<b>MC-Million Carats, MT-Million Tonnes</b>		





# Madhya Pradesh: Abundant Technical & Skilled Manpower

## Presence of Premier Institutes



IIT, Indore



Indo German Tool Room



IITM, Gwalior



MANIT, Bhopal



IIFM, Bhopal



IIM, Indore



NIFT, Bhopal



CIPET, Bhopal



NMIMS University, Indore



IIITDM, Jabalpur



NID, Bhopal



IISER, Bhopal

## Mining Specific Institutes

Jawaharlal Nehru College of  
Technology, Rewa



VNS Group of Institutions  
Faculty of Engineering, Bhopal



Rajiv Gandhi Proudyogiki  
Vishwavidyalaya (RGPV), Bhopal



Amicable Knowledge Solution  
University (AKSU), Satna



Aditya College of Technology  
and Science, SATNA



Swami Vivekananda University,  
Sagar



G.H Raisonni University (GHRU),  
Sausar



# Madhya Pradesh: Investment Opportunities

## Blocks scheduled for auctioning in Madhya Pradesh in FY: 2019-2020

S. No.	Name of the Block	District	Area (in Ha)	Mineral	Resources (in M.T.)
1	Imaliya Block	Katni	06	Gold	0.35
2	Chakariya Block	Singroli	31.1	Gold	0.137
3	Karondi Sangodi Limestone Block	Damoh	278.90	Limestone	34.32
4	Kosdana Block	Balaghat	40	Limestone	15.42
5	Jangaldehri Block	Chhindwara	75	Basemetal	1.568
6	Biskhan Block	Betul	11.88	Basemetal	2.15
7	Bunder Diamond Block	Chhatarpur	364.00	Diamond	34.20 (Million Carat)
8	Ghisi Basemetal Block	Betul	63.41	Basemetal	0.312
9	Bandarkha Block	Satna	122.31	Limestone	17.20
10	Nimarmunda Limestone Block	Damoh	127.27	Limestone	7.51
11	Gauthana Graphite block	Betul	9.993	Graphite	4.69
12	Ghuinsa Block	Satna	68.849	Limestone	9.98
13	Baghrel-Sani Block	Dindori	35.20	Bauxite	0.14

# Madhya Pradesh: Major Players in Mining

## Presence of Major Players in Mining in the State

M.P State Mining Corporation



Northern Coalfields Ltd.



South Eastern Coalfields Ltd.



Western Coalfields Ltd.



National Mineral Development Corporation



Hindustan Copper Ltd.



Manganese Ore India Ltd.



Fortune Granite

A.C.C.



J.P. Cement



Birla Cement



Prism Cement



Maihar Cement



Heidelberg Cement



Ultratech Cement



# Important Contacts



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