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Editor-Publisher  
**Jai Prakash Agarwal**

Executive Editor  
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Editorial Assistants  
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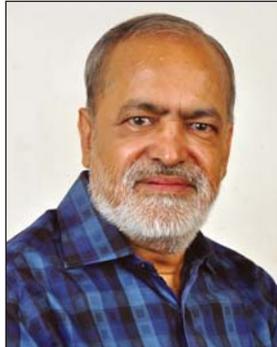
Office:  
**Industrial Chronicle**  
304, Jamuna Mansion  
5-9-207, Chirag Ali Lane, Abids  
**Hyderabad - 500 001**  
Phone: 040-23202406  
TeleFax: 040-42102492  
industrialchronicle@gmail.com  
www.industrialchronicle.com

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We have pleasure in presenting our latest, updated and informative “**Survey of Cement Industry & Directory 2019**”. It’s our **sixth edition**, while the first edition was released in 2003; the second in 2010, the third in 2012, the fourth in 2015 and the fifth in 2017. All the previous five editions were well received and very much appreciated for their contents on cement industry, individual cement companies, updated directory of corporate offices, cement plants and other relevant contents.

Our 6<sup>th</sup> edition provides all related information about 70 cement companies such as their background, promoters, cement plants, and their stand-alone capacities, captive power plants, waste heat recovery systems, capex plans, operational and financial performances, profiles of CEOs and other senior managers, new technological developments etc. In addition, the Directory of cement corporate offices, cement plants, suppliers of cement equipments and machinery, have updated information.

In 2003, when we released our first edition, then the Indian cement industry had only 60 major cement companies with 134 cement plants and an aggregate capacity of about 150 million tonnes per annum (MTPA). In the last 16 years, the number of cement companies has increased to 105, cement plants to 279 and the cement capacity to about 540 MTPA. This has happened despite over 25 companies acquired and merged with the existing companies. In addition, during this period, over 50 cement companies have installed coal based thermal captive power plants and about 25 companies have added waste heat power generation systems, which have capacities of 4565 MW and 470 MW, respectively.

Though the cement industry in India has been continuously growing but unfortunately, there is no single reliable source to provide the related, authentic and updated information except the Cement Manufacturers’ Association (CMA). But, the CMA information is confined to only its members numbering 47 cement companies, even less than the half of the 105 cement companies in existence. We have been consistently trying to fill the information gap through our special editions on cement industry since 2003 onwards.

We take this opportunity to thank all the cement companies, equipment and machinery suppliers, for extending their whole hearted co-operation in making the **6<sup>th</sup> Edition** much improved and quite successful.

  
Jai Prakash Agarwal