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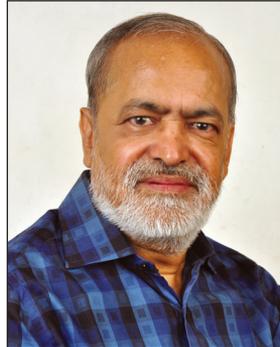
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We have pleasure in presenting our latest, updated and informative “**Survey of Cement Industry & Directory 2022**”. It’s our seventh edition, while the first edition was released in 2003; the second in 2010, the third in 2012, the fourth in 2015, the fifth in 2017, and the sixth in 2019. All the previous six editions were well received and very much appreciated for their contents on world cement scenario, growth history of Indian cement industry, cement MNCs’ entry in India, acquisitions and mergers, corporate profiles of existing cement companies, company-wise and

State-wise cement plants and their capacities, updated directory of cement corporate offices and plants, as well as other relevant information.

Our **7<sup>th</sup> Edition** provides all related information about 100+ cement companies such as their background, promoters, cement plants and their stand-alone capacities, bulk cement terminals, RMCs, white cement, CPPs, WHRs renewable energy, capex plans, operational and financial performances, key management teams, profiles of promoters/CEOs and other key persons, new technological developments etc. In addition, the directory of cement corporate offices, cement plants, suppliers of cement equipments and machinery, have fully updated information.

In 2003, when we released our first edition, then the Indian cement industry had around 60 major cement companies with 134 cement plants and an aggregate capacity of about 150 million tonnes per annum (MnTPA). In the last 19 years, the number of cement companies has increased to 100+, cement plants to 300+ and cement capacity to 600+ MnTPA. This has happened despite 30+ companies have been acquired and merged with the existing companies and some new owners. In addition, during this period, 50+ cement companies have installed CPPs with a total capacity of over 5000 MW and 30+ companies have added about 1000 MW WHRs.

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 limited members numbering 45+ cement companies, which is less than even 50 per cent of the total existing cement companies. 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/cement plants, equipment/machinery suppliers for extending their whole hearted co-operation and support in making our **7<sup>th</sup> Edition** much improved and quite successful.

  
Jai Prakash Agarwal