

INDIAN MINERALS & MARKETS **FORUM** 2019

JW Marriott Mumbai Juhu,
18-20 November 2019

(Field Trip 21-22 November 2019)



India's key industrial minerals & markets, their drivers, trends, & outlook

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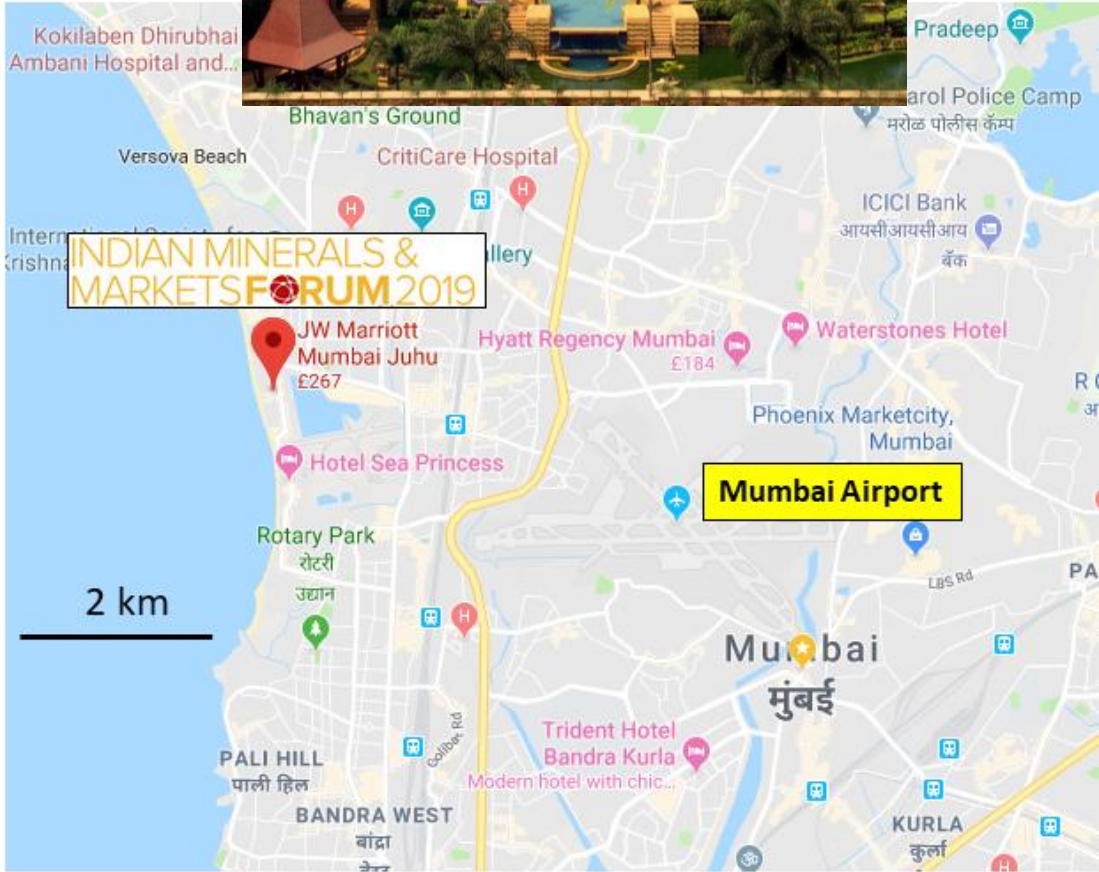
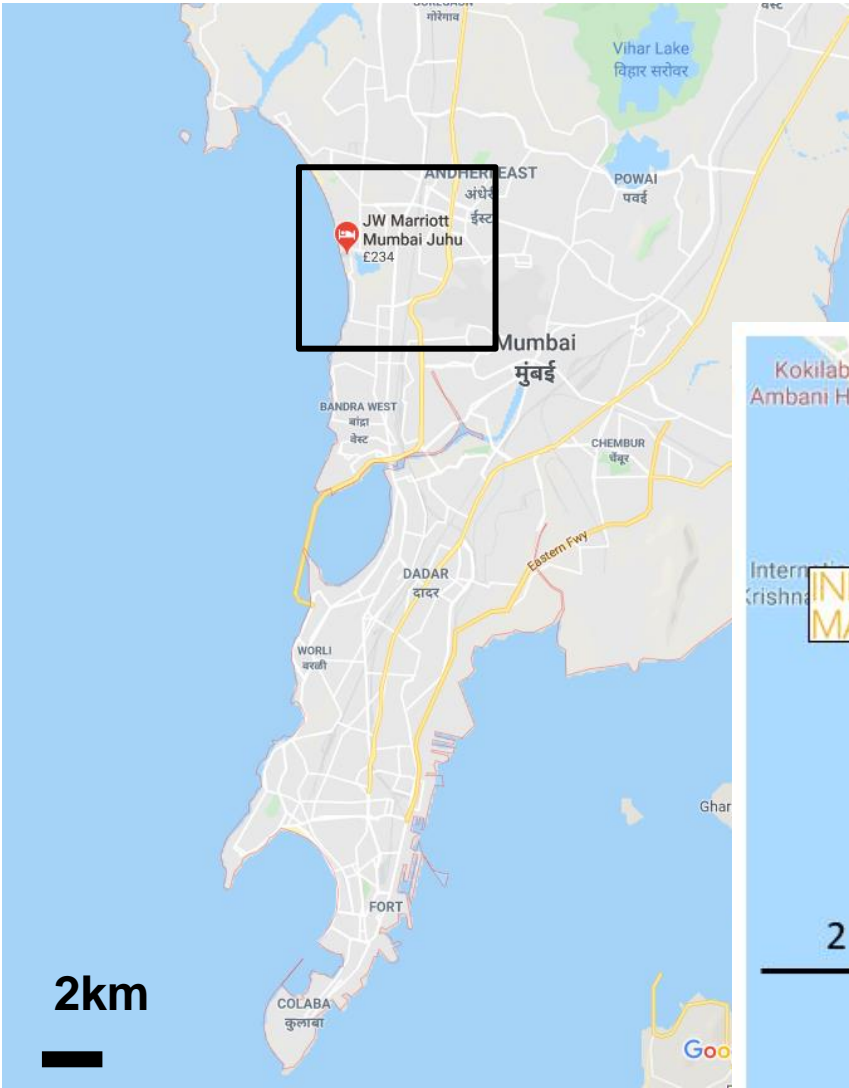


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Welcome to Mumbai





Welcome to Mumbai







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 Tractus Asia Ltd
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 Wolkem India Ltd



Outstanding agenda and excellent choice of venue, great attention to detail in the organisation.

Jose Martin, Global Sourcing Manager, Allied Mineral Products, USA

Excellent and insightful sessions, good ambience, very well done.

Sumeet Verma, Snr. General Manager, Golcha Group, India

It was a great event. I look forward to attend future events in India and elsewhere.

Suresh Deshmukh, Director, Industrial Minerals LLC, Oman

Congratulations on such a well organised event at such a great venue. You really know how to run a great event such as this.

Murray Lines, Managing Director, Stratum Resources, Australia

Excellent coverage and organisation, mobile app a good initiative.

Vishal Shimpi, Manager International Marketing, Orient Abrasives Ltd, India

Good programme and well organised.

Isabelle Florens, Purchasing Manager, Saint-Gobain SEPR, France

Nicely organised and very informative. Mobile app very nice initiative and “Mentimeter” [live online audience poll] is very effective.

Dr Mahesh Kulkarni, Snr. Scientist R&D, Ashapura Group, India

Very good conference and much needed platform, very good management of official and social segments of programme.

Madhur Aggarwal, Consulting Manager, Tractus Asia (India) Pvt Ltd, India



Setting the Scene

INDIAN MINERALS & MARKETS **FORUM** 2019



Why are we here?



Setting the Scene

Why are we here?

1. Response to customer demand

2. Mineral market potential

India's minerals industry is on the threshold of a new era with exciting growth potential in both established and emerging new mineral consuming markets

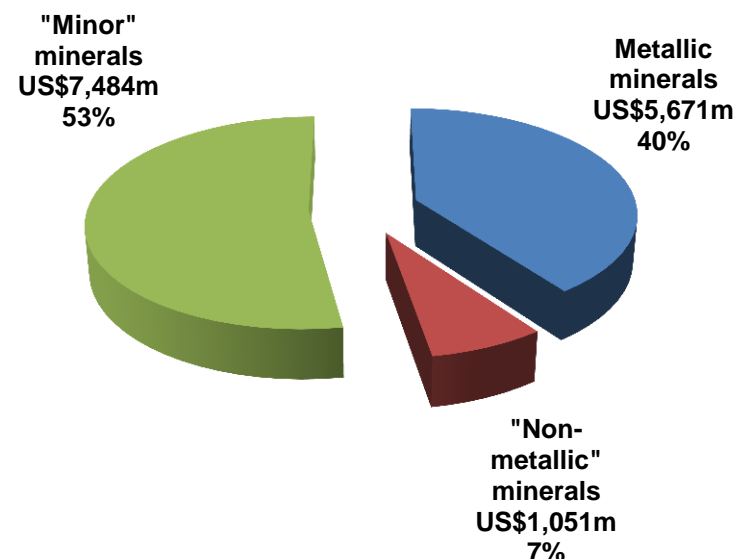


Setting the Scene

Why are we here?

- India has always been one of the world's great sources and markets for industrial minerals, but now looks set to significantly raise its profile.

Industrial mineral	Production 2018 ('000s tonnes)	Industrial mineral	Production 2018 ('000s tonnes)
Ball Clay	3,865	Limestone	338,552
Barytes	2,050	Magnesite	195
Bauxite	22,312	Mica	21
Bentonite	3,488	Ochre (iron oxide)	3,642
Calcite	95	Phosphorite	1,534
Chromite	3,480	Pyrophyllite	39
Dolomite	4,592	Quartz	3,951
Feldspar	4,270	Quartzite	1,018
Fireclay	723	Rare earths	2
Fluorspar	1	Rutile	11
Fuller's Earth	798	Shale	124
Garnet (abrasive)	158	Silica sand	89,807
Graphite (r.o.m.)	33	Sillimanite	82
Gypsum	2,048	Talc	1,614
Ilmenite	285	Vermiculite	6
Kaolin	7,816	Wollastonite	153
Kyanite	7	Zircon	14



"Minor minerals" include many significant industrial minerals (eg. barite, bentonite, feldspar, kaolin, silica sand, talc – see left), whose producers report production data directly to their respective state authorities and not to the IBM

"Atomic minerals" (uranium, thorium, niobium, tantalum, beryllium, lithium, zirconium, titanium, rare earths)

Setting the Scene

Why are we here?

- Already the world's fifth largest manufacturer
- On track to be the world's fastest growing economy with IMF estimated GDP growth forecasts of 7.3% for FY2019 and 7.4% for FY2020.
- Fiscal average in GDP growth in the last five years has topped 7.5%, defining a "new normal" for the Indian economy.
- Driven strong growth in primary mineral consuming market sectors such as construction, steel, foundry, cement, glass, ceramics, paper, paint and plastics.
- Recent activity by overseas manufacturers keen to establish subsidiaries and participate in joint ventures in India, eg. RHI Magnesita, Imerys, Vesuvius, Almatris.
- At the start of 2019 India had overtaken Japan as the world's second largest steel producer, and by the end of the year is expected to become the world's second largest steel consumer.



Setting the Scene

Why are we here?

But some headwinds:

- Uncertainty over impacts of global recession, trade wars
- Overreliance on Chinese mineral imports
- Logistics infrastructure challenges

Resulting in a rejuvenation?

- An urgent reassessment of domestic and import options
- New wave of mineral resource and product development in India (and other Asian countries) as the challenge grows for consumers keen to secure new and alternative sources of industrial mineral supply as their markets expand.
- A major upward transition for Indian mining in the next few years, a new National Mining Policy unveiled in February 2019.



Setting the Scene

Why are we here?

- **Nationwide reform drivers:**
 - “Make in India” initiative (making India a global manufacturing hub),
 - “Smart Cities Mission” (urban renewal and retrofitting)
 - “Saubhagya scheme” (rural electrification),
 - Focus on building renewable energy projects under the National Electricity Policy.
- **Rising demand from infrastructure and transportation sector schemes:**
 - housing for all by 2022
 - “Bharatmala Pariyojana scheme” (84,000km new highways by 2022)
 - expansion of the railway network
 - development of “Industrial Corridors” (eg. Amritsar-Delhi-Kolkata, Bengaluru-Mumbai, Visakhapatnam-Chennai)



Programme – Tuesday Morning

OVERVIEWS

- 09.00 **Introduction**
Ismene Clarke, Director & Mike O'Driscoll, Director, INFORMED, UK
- 09.15 **Welcome Address**
Chetan Shah, Chairman, Ashapura Group, India
- 09.30 **Supply and demand of important industrial minerals in India**
Dr. Pradeep Kumar Jain, Chief Mineral Economist, Indian Bureau of Mines, India



Mike O'Driscoll
Chairperson

10.00 COFFEE

INVESTMENT & TRADE

- 11.00 **The climate & outlook for mineral project investment & development in India**
John Evans, Managing Director, Tractus Asia Ltd, Thailand
- 11.30 **Risks, concerns, & impact of mineral legislation & India's mineral requirements to 2050**
Anurag Ojha, Snr. Manager (Mining), Anil Kumar, DGM, & Pradeep Kumar, DGM, NMDC Ltd, India
- 12.00 **Trading and investing in Indian industrial minerals**
Ajay Kulshreshtha, AK Minerals Consultancy Services, India

12.30 LUNCH



**What are the key
issues in the Indian
minerals markets?
Have your say!**

**Please download this free
App now**

**We shall poll the audience at
end of the first session**



Programme – Tuesday Afternoon

REFRACTORIES MARKET 1

- 14.00 **New refractory developments: high performance refractory aggregate**
Dr. Mahesh Kulkarni, Senior Scientist R&D, Ashapura Minechem Ltd, India
& Manan Shah, President, Orient Abrasives Ltd, India
- 14.30 **Refractory raw materials supply & demand in India**
Hakimuddin Ali, Former Chairman Imerys India & Former Chairman IRMA, India
- 15.00 **Overview of supply and demand of India's refractories**
Sameer Nagpal, CEO, Dalmia OCL Ltd, India

15.30 COFFEE

REFRACTORIES MARKET 2

- 16.00 **Kyanite in refractories: Indian economic drivers & markets**
Aditya Newalkar, Executive Director, Maharashtra Minerals Corp. Ltd, India
- 16.30 **Secondary raw materials for refractory industry**
Dr. Nilachala Sahoo, Director (Technical), Chaitanya Refractory Pvt Ltd/Global Recycling, India

17.00 CLOSE OF DAY 1



Richard Flook
Chairperson



Mike O'Driscoll
Chairperson



Programme – Wednesday Morning

CERAMIC & FILLER MINERALS & MARKETS

- 09.30 **Feldspar and quartz production and markets**
Dr. V. Balasubramaniam, Director, Gaangey Minerals Pvt. Ltd, Gimpex Group, India
- 10.00 **Opportunities for Indian filler mineral suppliers in plastics rubber & coating markets**
Samantha Wietlisbach, Principal Analyst Chemicals, IHS Markit, Switzerland

10.30 COFFEE

PROCESSING DEVELOPMENTS

- 11.00 **Wet processing of industrial minerals in India and South East Asia**
Dr. Arabinda Bandyopadhyay, Chief Technologist, CDE Asia Ltd, India
- 11.30 **Future oriented processing technology for high-end industrial minerals and their applications**
Dietmar Alber, Business Development Director, Minerals & Metals Division, Hosokawa Alpine AG, Germany
- 12.00 **Water-free electrostatic processing of fine minerals**
Kyle Flynn, Sales Engineer, ST Equipment & Technology, USA

12.30 LUNCH



Mike O'Driscoll
Chairperson



Murray Lines
Chairperson



Programme – Wednesday Afternoon

FUTURE MINERAL & MARKET DEVELOPMENTS

- 14.00 **Minerals for the electrification of India**
Dr Richard Flook, Managing Director, Mosman Resources, Australia
- 14.30 **Li-ion batteries – Where we are now and what is the direction of travel?**
Alison Saxby, Director Operations, Roskill, UK



Mike O'Driscoll
Chairperson

15.00 COFFEE

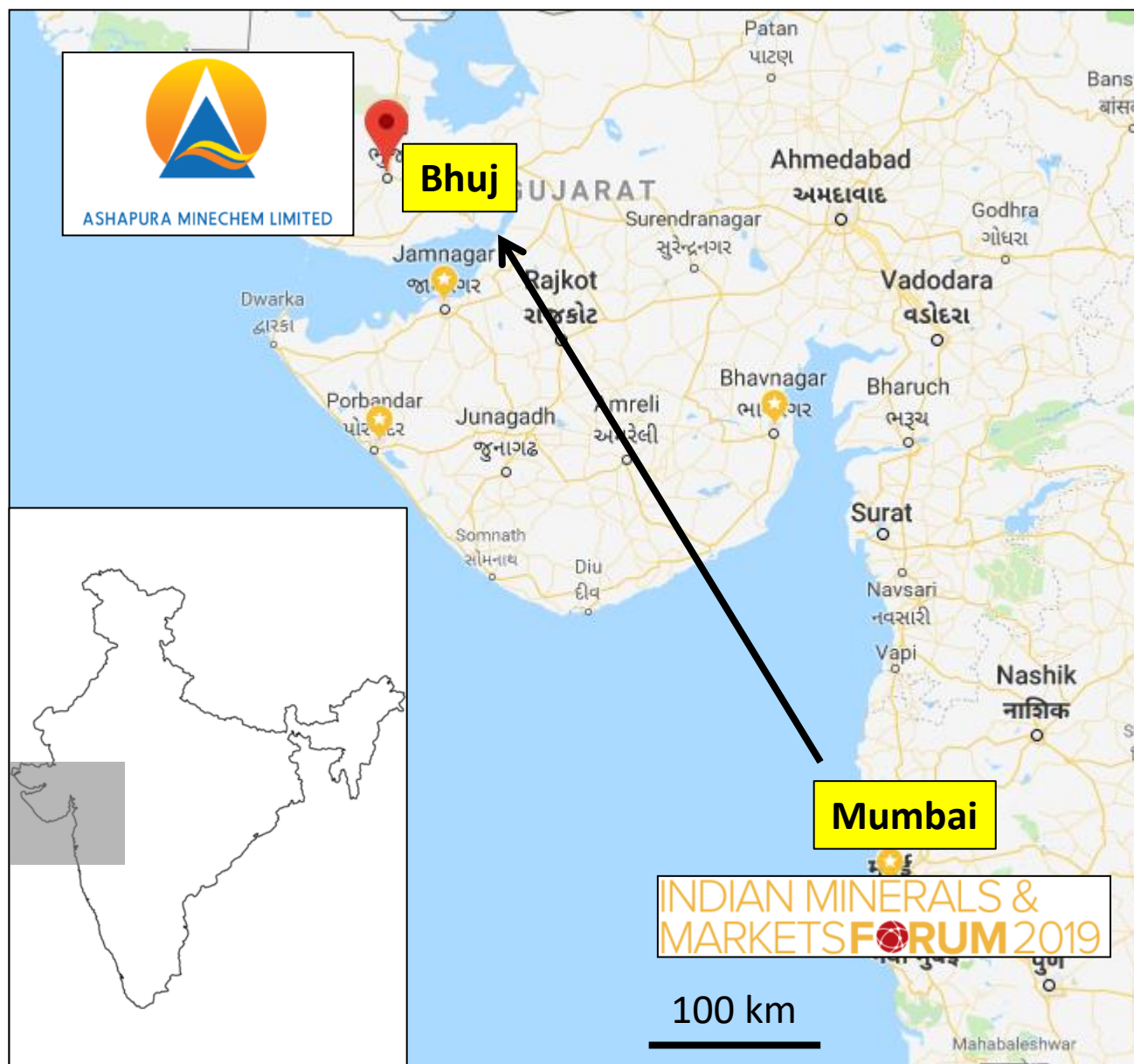
- 15.30 **High purity quartz supply & demand**
Murray Lines, Managing Director, Stratum Resources, Australia
- 16.00 **Wollastonite and its market outlook**
Gaurang Singhal, Director, Wolkem India Ltd, India
- 16.30 **Graphite developments, markets & India's mineral challenge**
Puruvi Poddar, Group Manager - Business & Project Development, Tirupati Graphite, India

CLOSE OF CONFERENCE

- 17.00 **Drinks reception to be held in the foyer area of Grand Sangam Ballroom**



Programme – Thursday-Friday 19-20 Nov.



Field Trip Bhuj, Gujarat



Programme – Thursday-Friday 19-20 Nov.

FIELD TRIP: ASHAPURA GROUP, BHUJ, GUJARAT

It is the responsibility of delegates to arrange and pay for their own flights to/from Bhuj.

THURSDAY 21 NOVEMBER

06.35 depart Mumbai Airport Air India AI9625 to Bhuj

08.30 arrive Bhuj, Gujarat

09.30 Bentonite & kaolin mines

13.00 LUNCH

14.30 Check into hotel, The Prince, Bhuj
Rest period

17.00 Vande Mataram Memorial Museum with light show
Dinner at Prince Hotel

FRIDAY 22 NOVEMBER

09.00 Baraya processing complex

12.00 LUNCH

13.00 Ashapura R&D Centre

14.00 Perfoclay plant

16.00 Back to hotel

PLEASE NOTE: Owing to recent Jet Airways dissolution, the next return flight to Mumbai is now

Saturday 23 November: Air India AI9626

depart Bhuj 08.55, arrive Mumbai 10.55.



Chairpersons & INFORMED staff



Mike O'Driscoll
Director & Chairperson



Richard Flook
Consultant & Chairperson



Murray Lines
Consultant & Chairperson



Ismene Clarke
Director



Maria Bernard
Sales Manager



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 - Oilfield Minerals



MINERAL RECYCLING **FORUM** 2020

Pullman Hotel Aachen Quellenhof, 10-11 March 2020

**Secondary raw material sources, supply,
processing, and markets**

The future & fundamentals of industrial minerals



IMFORMED *Rendezvous*

Grand Hotel Huis ter Duin (Noordwijk),
Amsterdam, 6-8 April 2020



MAG**FORUM** 2020

Magnesium Minerals & Markets Conference
Grand Hotel Huis ter Duin (Noordwijk),
Amsterdam — 27-29 May 2020

Includes exclusive Field Trip to Nedmag, Veendam

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OILFIELD MINERALS & MARKETS **FORUM** HOUSTON 2020

Hilton Houston Post Oak, Hilton, 8-10 June 2020

FLUORINE **FORUM** 2020

Pan Pacific Hanoi

12-14 October 2020



Includes exclusive Field Trip to Masan Resources, Nui Phao

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M A S A N
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CHINA REFRACTORY MINERALS **FORUM** 2020

Dalian, September 2020



Includes exclusive Field Trip to magnesite operations, Haicheng



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