MAFIK SAR
MONTHLY SUMMARY
ON
अलौह खनिज एवं धातु
NON-FERROUS MINERALS & METALS
सितंबर - 2018
SEPTEMBER - 2018

भारत सरकार / GOVERNMENT OF INDIA
खान मंत्रालय / MINISTRY OF MINES
1 Aluminium:

1.1 Global Scenario:

During the Quarter 4\textsuperscript{th} of 2018, the world consumption of Aluminium Metal is expected to be 16.60 million tonnes against world production of 16.72 million tonnes, keeping the market in deficit of 0.12 million tonnes. The world production of Aluminium Metal in 2018 is expected to be 64.36 million tonnes as against the consumption of 66.13 million tonnes thereby pushing the market into a deficit of 1.77 million tonnes.

1.2 Domestic Scenario:

Production of aluminium metal in the public sector unit i.e. National Aluminium Company Ltd. (NALCO) and private sector units, namely, Bharat Aluminium Company Limited (BALCO), Hindustan Aluminium Company Ltd. (HINDALCO), and SESA Sterlite Limited in the country, during the month of \textbf{September, 2018} was as follows:

(Unit: MT)

<table>
<thead>
<tr>
<th>Name of the Company</th>
<th>Existing Capacity</th>
<th>September, 2018</th>
<th>Cumulative Production Target</th>
<th>Cumulative Production</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Production</td>
<td>Production</td>
<td>September, 2018</td>
</tr>
<tr>
<td>NALCO</td>
<td>4,80,000</td>
<td>31,700</td>
<td>36,051</td>
<td>1,95,000</td>
</tr>
<tr>
<td>BALCO</td>
<td>5,70,000</td>
<td>46,999</td>
<td>46,852</td>
<td>2,86,775</td>
</tr>
<tr>
<td>HINDALCO</td>
<td>4,10,000</td>
<td>33,658</td>
<td>33,946</td>
<td>2,05,312</td>
</tr>
<tr>
<td>VEDANTA Ltd.*</td>
<td>5,00,000</td>
<td>44,556</td>
<td>44,997</td>
<td>2,71,080</td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td><strong>19,40,000</strong></td>
<td><strong>1,56,913</strong></td>
<td><strong>1,61,846</strong></td>
<td><strong>9,58,167</strong></td>
</tr>
</tbody>
</table>

National Aluminium Company Limited (NALCO) sold 32,843 MT of Aluminium during \textbf{September, 2018}.

* VEDANTA has not declared commercial production from plant -2, which is currently on trial run; hence data of plant 2 has not been given.
2. Copper

2.1 Copper Ores:

2.1.1 Domestic Scenario:

HCL is the only domestic producer of copper ore. The production of Copper Ore during September, 2018 is 3.24 lakh tonnes. Production during the corresponding period in the previous year was 2.59 lakh tonnes.

2.2 Copper Metal

2.2.1 Domestic Scenario:

The size of Indian copper industry (consumption of refined copper per annum) is around 6.6 lakh tonnes, which as percentage of world copper market is only three percent. Sterlite Industries, Hindalco Industries and Hindustan Copper Ltd. are major producers of refined copper in India. Production in India has declined significantly due to the permanent closure order issued to Vedanta Smelter/ refinery plant by Tamilnadu Government in May, 2018.

The production of copper metal (cathode) by HCL during September, 2018 is 2082 tonnes. The production of copper metal (cathode) by HCL during the corresponding period in the previous year was 2307 tonnes.

At the end of August, copper stocks held at the major metal exchanges (LME, COMEX, SHFE) totalled 5,72,719 tonnes, an increase of 30,190 tonnes (6%) from stocks held at the end of December 2017. Stocks were up at the LME but down at SHFE and COMEX.

Factors Influencing Copper Markets:

- Copper prices in India are fixed on the basis of the rates that rule on LME and Rupee & US Dollar exchange rate.

- Economic growth of the major consuming countries such as China, USA, Japan, Germany, India etc.

- Growth and development in the infrastructure, real-estate, telecom and electrical industry.

Price Outlook:

- The average LME price in September, 2018 was US$ 6,020 per MT compared to average LME of US$ 6,040 per MT in August, 2018. The average LME price during the year 2017-18 was US$ 6,444 per MT.
Overall Performance of Hindustan Copper Limited:

During the month of September, 2018 production of Metal-in-concentrate, Cathode and CC Wire Rod was 104%, 87% and 143% of the targets respectively. The sale of copper (cathode, cc wire rod and MIC) during the month of September, 2018 was 214% of the target.

Physical Performance of Hindustan Copper Limited

<table>
<thead>
<tr>
<th></th>
<th>Installed Capacity</th>
<th>Target of Year</th>
<th>Target in September, 2018</th>
<th>Actual in September, 2018</th>
<th>Cumulative target upto the September, 2018</th>
<th>Actual upto the September, 2018</th>
<th>Cumulative in previous year upto September, 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>PHYSICAL PERFORMANCE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Copper Cathodes (MT)</td>
<td>49,500</td>
<td>28,000</td>
<td>2,381</td>
<td>2,082</td>
<td>13,714</td>
<td>6,487</td>
<td>13,491</td>
</tr>
<tr>
<td>CC Copper Wire Rods (MT)</td>
<td>60,000</td>
<td>23,964</td>
<td>1,997</td>
<td>2,855</td>
<td>11,982</td>
<td>11,497</td>
<td>11,065</td>
</tr>
</tbody>
</table>

The production of copper cathode in the organized sector by the public sector unit, Hindustan Copper Ltd. (HCL), and private sector units, Hindalco Industries Ltd. (HINDALCO, Unit: Birla Copper) and Sterlite Industries (India) Ltd. (SIL) in the country, during the month of September, 2018 was as follows:

<table>
<thead>
<tr>
<th>Name of the Company</th>
<th>Installed Capacity (Annual)</th>
<th>September, 2018</th>
<th>Cumulative Production Target</th>
<th>Cumulative Production</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Production Target</td>
<td>Production Actual</td>
<td>September, 2018</td>
</tr>
<tr>
<td>HCL</td>
<td>49,500</td>
<td>2,381</td>
<td>2,082</td>
<td>13,714</td>
</tr>
<tr>
<td>HINDALCO</td>
<td>5,00,000</td>
<td>**</td>
<td>34,284</td>
<td>**</td>
</tr>
<tr>
<td>SIL</td>
<td>4,50,000</td>
<td>38,281</td>
<td>7,787</td>
<td>2,12,858</td>
</tr>
<tr>
<td>Total:</td>
<td>9,99,500</td>
<td>27,779</td>
<td></td>
<td>1,57,016</td>
</tr>
</tbody>
</table>

** Not specified, depends upon various economic factors
3. **Zinc**

**Domestic Scenario:**

In India, the main producers of Zinc are Hindustan Zinc Limited (HZL) (Govt. of India holds 29.54% of equity share) and Edayar Zinc Ltd. (erstwhile Binani Zinc Limited (BZL)).

Production details of above companies are as below:

<table>
<thead>
<tr>
<th>Company</th>
<th>Existing capacity</th>
<th>September, 2018</th>
<th>Cumulative Production 2018</th>
<th>Cumulative Production 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Production Target</td>
<td>Actual Production</td>
<td>Target</td>
</tr>
<tr>
<td>HZL</td>
<td>8,43,000</td>
<td>69,892</td>
<td>58,040</td>
<td>4,13,270</td>
</tr>
<tr>
<td>Edayar Zinc Ltd.</td>
<td>38,000</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>8,61,000</strong></td>
<td><strong>69,892</strong></td>
<td><strong>58,040</strong></td>
<td><strong>4,13,270</strong></td>
</tr>
</tbody>
</table>

4. **Lead**

The production details of Hindustan Zinc Limited (HZL) is given below:

<table>
<thead>
<tr>
<th>Company</th>
<th>Existing capacity</th>
<th>September, 2018</th>
<th>Cumulative Production 2018</th>
<th>Cumulative Production 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Production Target</td>
<td>Actual Production</td>
<td>Target</td>
</tr>
<tr>
<td>HZL</td>
<td>2,01,000</td>
<td>17,505</td>
<td>18,909</td>
<td>1,06,401</td>
</tr>
</tbody>
</table>

5. **Gold**

The total production details of gold produced by Hutti Gold Mines Limited (HGML) and HINDALCO during the month of **September, 2018** are given below:

<table>
<thead>
<tr>
<th>Name of the Company</th>
<th>September, 2018 Production</th>
</tr>
</thead>
<tbody>
<tr>
<td>HGML</td>
<td>0.122</td>
</tr>
<tr>
<td>HINDALCO</td>
<td>0.700 (As by product)</td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td><strong>0.822</strong></td>
</tr>
</tbody>
</table>
6. Survey, Exploration & Production of Minerals:

In the Ministry of Mines, GSI and MECL carry out regional exploration and detailed exploration respectively:-

6.1 Geological Survey of India:

(a) Mineral Investigation: During the month of September, 2018, 566.15 sq km large scale mapping, 12.46 sq km detailed mapping and 6,517.55 m of drilling were carried out against monthly targets of 300 sq km, 18.75 sq km and 9,600 m respectively.

6.2 Mineral Exploration Corporation Limited

During September, 2018 MECL achieved 43,582 Meter of drilling against a target of 44,000 Meter.

7. Production of Minerals

Estimated value of Mineral production covering metallic-ferrous and industrial minerals, but excluding fuel minerals, minor minerals and atomic minerals, in September, 2018 is Rs. 4,898 crore as against Rs. 4,103 crore for September, 2017.

(Anil Kumar Nayak / Anil Kumar Nayak)
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Tel. - 23384334