

CEMENT INDUSTRY CONSULTING SERVICES

Global Experience & Capabilities • Comprehensive Services • Client-focus



Overview

- ▶ Holtec is a leading engineering & business consulting company focused on the global cement industry.
- ▶ Has serviced nearly 900+ clients spread over 90+ countries.
- ▶ Five decades of experience.
- ▶ Comprehensive range of services in Geology & Mining, Process / Mechanical / Civil / Electrical / C & I Engineering, Project Management, Environment Management, Performance Enhancement, Plant Operations & Maintenance, Integrated Solutions and Business Consulting.
- ▶ Other than cement, also operates in related sectors such as construction, highways & bridges, building materials, material handling, power, etc.
- ▶ ISO 9001 quality certified since 1995.

We continuously
improve our people
& processes
to consistently
deliver reliable
services & solutions
ensuring Customer
Satisfaction.



Experience & Capabilities

- ▶ End-to-end services from concept to plant operation, including relevant studies, procurement, engineering, field supervision and plant management for 140+ green-field & brown-field cement plants with capacities up to 10,000 TPD.
- ▶ Executed 1200+ plant modification projects for various capacities.
- ▶ Executed 440+ Raw material Investigation and Environment Assessment projects.
- ▶ Generated 660+ Feasibility Reports.
- ▶ Carried out 900+ Business Consulting and Performance Enhancement assignments.
- ▶ Possess over 6000+ man years of experience in the cement industry, employing some of the most eminent professionals in their respective fields.
- ▶ Extensive working experience with Cement Producers, Equipment Suppliers, Construction Companies, Funding Agencies, etc., in the global environment.
- ▶ Comprehensive, integrated, multi-disciplinary approach to deliver maximum value for the client and the project.
- ▶ Leverage global experience and know-how to optimally select plant locations, technologies, project execution methodologies, etc.



Comprehensive Services

Project Formulation Phase

- ▶ Strategic Plant Location
- ▶ Geological Investigation
- ▶ Geo-Technical / Hydrological Investigation
- ▶ Techno-Economic Feasibility Studies
- ▶ Environmental (EIA / EMP) Studies
- ▶ Statutory Mining Plan & Computer Aided Deposit Evaluation
- ▶ Investment Opportunity and Due Diligence Studies
- ▶ Business Planning



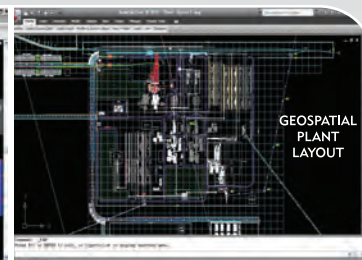
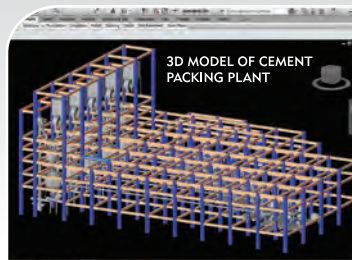
Project Implementation Phase

- ▶ Basic Engineering
- ▶ Procurement
- ▶ Detailed Engineering
 - ★ Mechanical ★ Civil & Structural
 - ★ Process ★ Electrical
 - ★ Building Information Modelling
 - ★ Control & Instrumentation
- ▶ Project Planning & Monitoring
- ▶ Inspection
- ▶ Field Supervision
- ▶ Commissioning and Plant Stabilization
- ▶ Market Entry Services



Performance Enhancement Phase

- ▶ Operation & Maintenance of Cement Plants
- ▶ Online Analytics & Remote Monitoring
 - ★ Plant
 - ★ Mines
- ▶ Plant Optimization Services including
 - ★ Operation Audit
 - ★ Capacity Balancing
 - ★ Plant Modification & Upgradation
 - ★ Performance Enhancement
- ▶ Civil & Structural Assessment
- ▶ Waste Heat Recovery Systems
- ▶ Utilization of Alternative Fuels
- ▶ Mines Scheduling & Optimization Services
- ▶ Marketing, HR MIS services, etc



Resources

- ▶ Large pool of highly trained, committed and globally experienced professionals who deliver value using robust and structured ISO-9001 certified processes.
- ▶ Extensive computerized databases developed over Five decades of international experience, Spanning areas such as:
 - ★ Equipment suppliers, contractors and their capabilities
 - ★ Equipment types and performance
 - ★ Plant Data (Installations, Consumption rates, Costs, Investments, Manpower, etc.)
 - ★ Raw Material Data (Concessions, Characteristics, Correctives, Blending Materials, Fuels, etc.)
 - ★ Market Data (Logistics, Prices, Demands, Market Characteristics, Competition, etc.)
 - ★ Operating Conditions (Climatic, Seismic, Soil, Hydrology, Environment, etc.)
 - ★ Statute, Incentives and Taxation Frameworks.
- ▶ Contemporary IT infrastructure
- ▶ 53,000 ft² modern offices in Gurgaon, India and in Sharjah, UAE. Site offices at various global locations.



4000+ projects in 90+ countries for 900+ clients



Sample Clients

India: ABG Cement, ACC, Adani Group, Ambuja Cements, Andhra Cement, Birla Corp, Calcom Cement, Cement Corporation of India, Cement Manufacturing Company, Chettinad Cement, Dalmia Group, DCM Shriram Group, Deccan Cement, Emami Group, Hindustan National Glass, Indiabulls Group, India Cements, J K Cements, J K Lakshmi Cement, Jaiprakash Group, Jammu & Kashmir Cement, JSW Cement, KJS Cement, Malabar Cements, Mangalam Cement, Mawmluh Cherra Cements, Meghalaya Cements, Metso Minerals, National Thermal Power Corporation, Nirma Group, Orient Cement, Piramal Group, Reliance Group, RNB Cement, Sanghi Group, Saurashtra Cement, Shree Cement, Sterlite Industries, Tamilnadu Cements, Tata Power, Ultratech Cement, Vinay Cements, Wonder Cement, Zuari Cement

Asia (except India): Amrit Cement, Attock Cement, Bestway Cement, Dandot Cement, Donglam Cement, Dungsam Cement, Fecto Cement, Fico Tay Ninh Cement, Hatien 1 Cement, IHI Japan, Kobe Steel, Lucky Cement, Morning Star Cement, Norm LLC, Penden Cement, PT United, Puttalam Cement, Vietnam Construction & Import-Export Company

Middle-East: Al Jouf Cement, Al-Rajhi Investments, City Cement, Cemena Group, Emirates Cement, Hail Cement, Kuwait Cement, Oman Cement, Najran Group, National Cement, Northern Region Construction Company, Qatrana Cement, Riyadh Cement, Saudi Cement, Southern Province Cement, Tabuk Cement, Yanbu Cement, Yemeni Saudi Cement

Africa: Algerian Cement, Alnsr Cement, ASEC Cement, BSA Group, Building Material Industries, Cimerwa Cement, Derba Midroc Cement, Messebo Cement, Orascom Construction Industries, Tanzania Portland Cement, United Cement of Nigeria

Europe: Aalborg Portland Cement, Cementizillo, Ciments Francais, FCB Ciment, Irish Cement, Titan Cement, Vicat Group, Vigier Group,

Americas & Oceania: Ausenco, Battelle Memorial Institute, CLI Corporation, CSD Services, Famm Steel, Institute for Industrial Productivity, Milling Machinery, Norgate Metal, Prospect Steel, Trident Structures

Global Groups: ASEC Group, Cementir, Dangote Industries, Heidelberg, Italcementi, LafargeHolcim

Financial Institutions : Axis Bank, Baring Private Equity, Bain Capital, Bank of Baroda, Blackstone Advisors, Canara Bank, Citibank, Deutsche Bank, Ecobank Development Corporation, HSBC Bank, Industrial Development Bank of India, International Bank for Reconstruction and Development, International Finance Corporation, ILFS Financial, J P Morgan, KKR Group, L&T Infra, Motilal Oswal Investment, Punjab National Bank, State Bank of India, State Bank of Hyderabad, Spark Capital, Standard Chartered Bank, Swiss Agency Cooperation, Temasek Capital, The World Bank, U.S Aid, UNDP

Registrations

The World Bank, Asian Development Bank, African Development Bank, The Kuwait Fund for Arab Economic Development and several UN organisations.

Registered in India with bodies like the Ministry of Industry of the Government of India, all the principal development finance institutions, the National Highways Authority, etc.

A member of the Confederation of Indian Industry and a founder member of the Consulting Engineers Association of India and the Consultancy Development Centre.



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