
INDIA LIME
Burning Quietly
Thousands of kilns. One untold story.
Dr Raghubir S Grewal
Chairman, Dr Lime | ILA 2026, Barcelona
Imagery: Apple Maps

Born small by design, Grown large by demand

Two lime industries grew side by side

1967
Lime for construction and limewash reserved for small-scale industry

2007
Reservation ends (S.O. 62(E), 22 Jan 2007)

2009
India first appears in world lime statistics

Oct 2025
All limestone, including kiln stone, now categorised as a major mineral

Today
India is world no. 2 in Lime

Merchant lime

Thousands of small kilns, held to small-scale investment for four decades

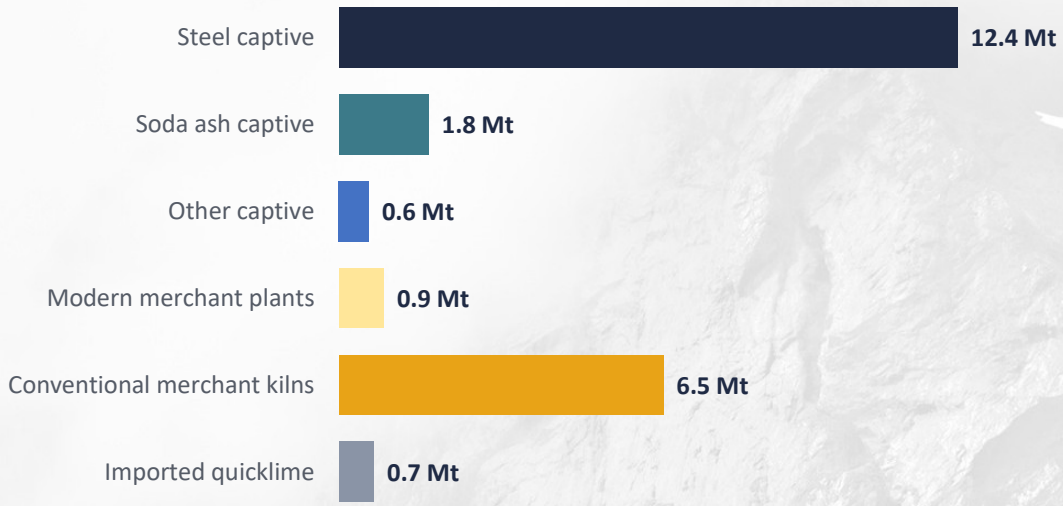
Captive lime

Large kilns built inside steel and chemical plants, outside the reservation

Sources: Government of India, Ministry of MSME, S.O. 62(E), 22 Jan 2007 (items 339A, 339B); USGS Mineral Commodity Summaries 2011 (first listing, 2009 data); Ministry of Mines, G.S.R. 751(E), 10 Oct 2025.

India's lime supply, 2025: ~23 Mt

Two industries, one name



~65% captive
Steel, soda ash and other plants make their own lime

~32% merchant
Conventional kilns and modern merchant plants

~3% imported
India makes its own lime

Presenters' estimate, based on: India limestone import data, Nov 2024–Oct 2025 (end use by buyer and lump size); SMS-grade output of state-controlled mines (~9 Mt stone); India kiln database (captive and modern merchant); field survey of conventional kilns; quicklime imports, 2024 trade data. 2.2 t limestone per t lime. Steel captive includes dolomitic lime.

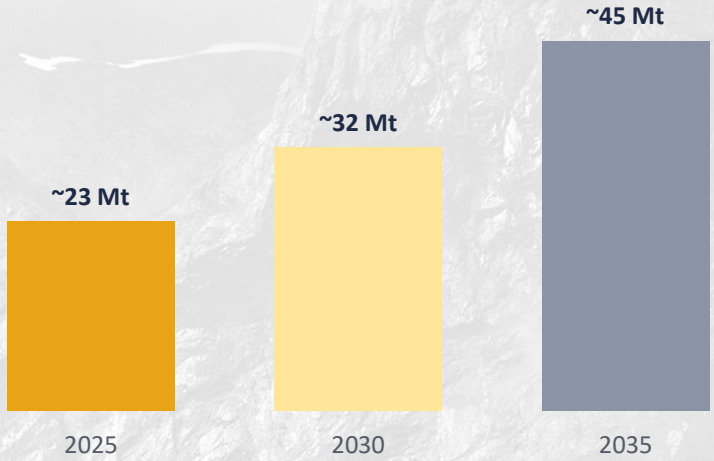
Demand doubled, It will double again

Lime-using industries have doubled since 2013; quicklime imports stay under 1 Mt

Growth since 2013



India lime demand at ~7% a year



AAC

€4.6 Mn (₹50 cr) (2008) →
~€368 Mn (₹4,000 cr)

< 1 Mt

Quicklime imported (2024)

Sources: USGS Minerals Yearbook 2013 and Mineral Commodity Summaries 2026 (raw steel); USGS soda ash tables (2013, 2024); trade data (quicklime imports, 2024); industry estimates (AAC).
Projection: presenters' estimate from ~23 Mt (2025) at ~7% a year; at 5% a year: ~29 Mt (2030), ~37 Mt (2035).

The lime-grade stone gap

India's lime-grade stone is scarce; hence its largest lime users import stone and burn it themselves

97%
cement grade (incl. ~4% BF grade, grouped by IBM) of ~227.5 bn t of limestone

~29 Mt
limestone imported, Nov 2024–Oct 2025

9 Mt
SMS-grade stone from state-controlled mines (RSMML, SAIL, RINL)

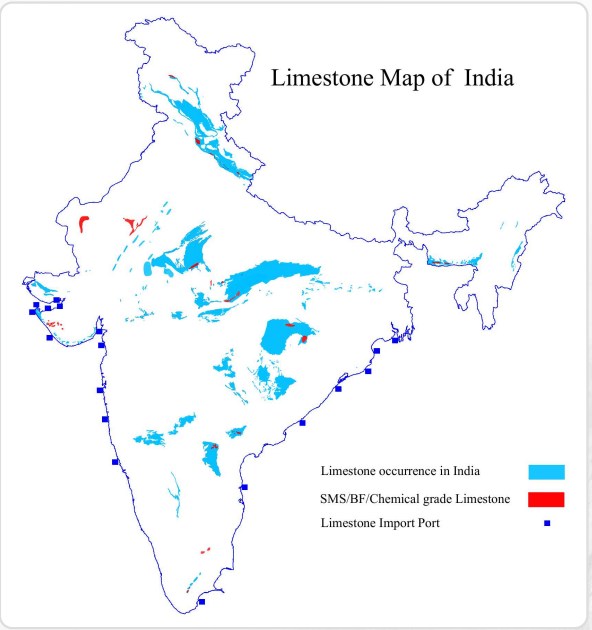
Where imported limestone goes: ~18.4 Mt (63%) into lime kilns



Sources: Indian Bureau of Mines, National Mineral Inventory (as on 1 Apr 2020: limestone resources and grades); India limestone import data, HS 2521, Nov 2024–Oct 2025, end use assigned by buyer type and lump size; RSMML, SAIL, RINL.

Limestone everywhere, Lime-grade almost no where

India's is abundant in limestone; however the grade industry requires is scarce and scattered



As Robert S. Boynton observed,

"limestone is found almost everywhere, but much of it is unusable: too deep, too remote, too scattered, or not pure enough."

India proves him right!

Abundant, but not lime-grade

Blue: limestone across India. Red: the scarce SMS, blast furnace and chemical grades.

Clusters grew on the red patches

Traditional lime belts formed around these few deposits, worked for decades.

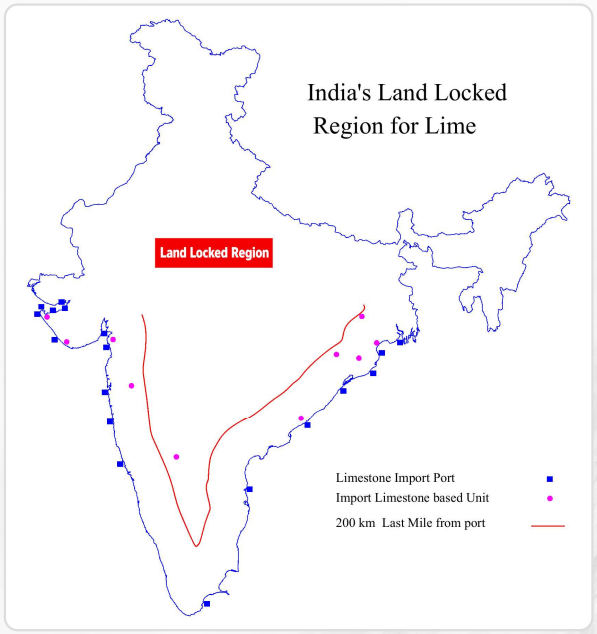
Rajasthan supplies India

Its high-grade belts now send lime across the country.

Map: presenters' compilation based on IBM/GSI data. Robert S. Boynton, Chemistry and Technology of Lime and Limestone (paraphrased).

India's landlocked lime heartland

Imported limestone works near the coast. Inland, it does not.



No. 1 importer

$722 million, ~33 Mt of limestone in 2023, about 80% from the UAE; four times the next importer

~200 km

Plants using imported stone sit within ~200 km of ports. Beyond that, freight erodes price in a price-sensitive market

The landlocked heartland is merchant lime's natural market.

Sources: World Bank WITS / UN Comtrade, India HS 252100 imports (2023); OEC (2022 importer ranking). Map: presenters' compilation. 200 km threshold: presenters' logistics assessment.

The quiet half

India's merchant lime: thousands of kilns serving industries across the country



Aerial view of a lime kiln cluster, Rajasthan. Imagery: Apple Maps

~7.4 Mt

merchant lime: ~6.5 Mt from conventional kilns, ~0.9 Mt from modern plants

1,233 units, ~3,300 kilns

Across five belts, led by Nagaur–Jodhpur in Rajasthan

~15 Mt capacity, ~43% used

Held back by severe fuel volatility, poor thermodynamic design, seasonal vulnerabilities and strict environmental regulations

Now a major mineral

Since October 2025, kiln limestone is regulated nationally

Serving real demand

Effluent treatment, AAC, construction, small steel, sugar

Presenters' estimate: field survey of 596 units in Nagaur, Jodhpur and Pali (2025); MSME industrial profiles (Andhra Pradesh, Telangana, Madhya Pradesh, Tamil Nadu, Kerala); industry experience (typical natural-draught kiln); India kiln database (modern plants). G.S.R. 751(E), 10 Oct 2025.

India: The Invisible No. 2

The world's second-largest lime producer, after China

	United States	Europe (EuLA)	Japan	India
Lime volume	15 Mt	20 Mt sales	~7 Mt shipped	**~23 Mt***
National association	NLA	EuLA	JLA (since 1950)	**Bharat Lime Association** (early stage)
Producers counted	24 companies	~100 companies	69 companies	**No official count** (our survey: 1,233 units)
Plants counted	70 plants	170 sites	—	**No official count** (~3,300 kilns surveyed)
End-use data published	Yes	Yes	Yes	**No**

The world's second-largest lime producer but still does not call itself a lime industry.

Sources: USGS Mineral Commodity Summaries 2026 (rank; US figures); ILA Overall Report 2025, EuLA and Japan Lime Association presentations (Japan: 2024 shipments). *India volume: presenters' estimate (slide 3).

Structured globally, Except India

Mature lime sectors are built on organised producers with their own deposits

China

China Lime Association, 400+ members. ~74% of world lime. Modernised to high-capacity rotary and PFR kilns

United States

NLA members make over 98% of US commercial lime. 5 companies make ~80%, in 23 states

Europe

EuLA: ~100 companies, 170 sites, one voice

United Kingdom

MPA Lime represents 100% of UK industrial lime manufacturers

Japan

Japan Lime Association since 1950: 69 companies

India

~65% of lime made in captive kilns. Bharat Lime Association still taking shape

Where mature producers own their stone, steel and chemical plants largely buy lime. In India there was no such supplier to buy from, so its largest lime users became their own suppliers.

Sources: USGS Mineral Commodity Summaries 2026 (China share: 310 of 420 Mt; US companies); China Lime Association; National Lime Association; MPA Lime; ILA Overall Report 2025 (EuLA, Japan Lime Association); India: presenters' estimate.

Mine to kiln: the world model, being built in India

From deposit to process, under one roof



337 ha mining lease

Drone survey of the full deposit, Khimsar, Nagaur district, Rajasthan

~18%

of India's chemical-grade limestone reserves: an 80 Mt high-grade deposit on 3.37 sq km

MW Mines

The resource

Single-source, high-grade deposit feeding its own kilns

Subaan Lime

The manufacturing

Limestone powders to 75 µm and ultrafine to 25 µm today; quicklime, hydrated lime and PCC in development

***Dr Lime**: one brand, from deposit to process*

Sources: Indian Bureau of Mines, National Mineral Inventory, Chapter 5: Reserves/Resources as on 01/04/2020; Dr Lime company data; drone survey of mining lease.

Regulation, energy and carbon

The same pressures as the rest of the world, from a very different starting point

One regime for all limestone

Since 10 Oct 2025, all limestone is a major mineral: short-term compliance for small kilns, long-term access and scale

Regulated fuel

Lime kilns are permitted to use petcoke, under the direct supervision of the Rajasthan State Pollution Control Board

Carbon pressure arriving

Through steel exports and tightening state pollution rules

Modernisation ahead

Asia leads the way: the world's first Maerz EcoKiln Ready, built for future CO_2 capture, fired up at Schaefer Kalk Malaysia in June 2026

Recarbonation opportunity

India's construction and AAC growth is where lime's carbon story can matter most

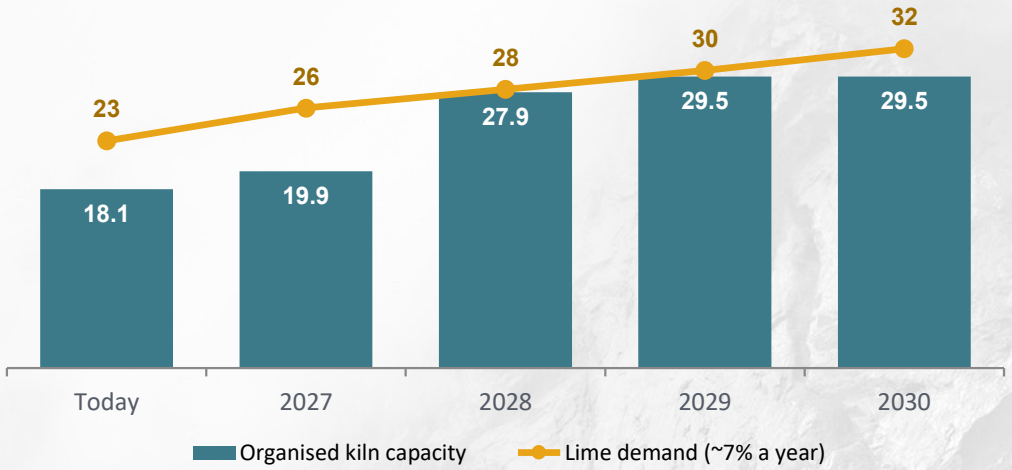
India's lime transition will be won in its merchant kilns.

Sources: Ministry of Mines, G.S.R. 751(E), 10 Oct 2025, and order under Section 20A, MMDR Act, 13 Oct 2025; Rajasthan State Pollution Control Board; Maerz Ofenbau AG (30 June 2026); ILA recarbonation initiative.

Outlook to 2030

The quiet half is about to get louder

Organised kiln capacity vs lime demand, India (Mt per year)



Plus ~15 Mt of conventional kiln capacity: ~45 Mt in total by 2030, against ~32 Mt of demand

+54 kilns
by 2029; organised capacity up over 60%

+10.8 Mt captive
steel, soda ash and chemicals

+0.5–1 Mt modern merchant
new PFR kilns: growing outward

~8–9 Mt conventional headroom
~15 Mt at ~43% use: growing inward

Presenters' estimate from India kiln database (installed and announced kilns, capacity at 365 days) and field survey of conventional kilns. Demand: ~23 Mt (2025) growing ~7% a year (slide 4).

INDIA'S ASK

India brings resource and demand, Global industry the know-how

Recognise the opportunity. Bring the technologies, processes and expertise that can accelerate India's next phase of lime.

1

Process Excellence

Advanced kiln and process technology that extracts more value from every tonne of limestone and every unit of fuel.

2

Value Creation

Know-how to move beyond commodity lime into hydrated lime, PCC and specialty grades for steel, chemicals and minerals.

3

Sustainable Growth

Efficient kilns, lower-carbon fuels and CO_2-ready technologies to build India's lime industry for the next decade.

Bring the know-how. Build the next generation of India's lime industry

World No. 2; ~23 Mt today, ~32 Mt by 2030; a merchant sector of over 7 Mt ready to modernise; the landlocked heartland (slides 3, 4, 7, 8, 13).

FROM BURNING QUIETLY… TO BURNING BRIGHT

Invisible.
Visible.
Invaluable.

The world has done it.

With the world's knowledge, India can.

The world's No. 2 is ready to be seen.

The Bharat Lime Association was founded through the vision of the late Hiroo Makhijani. Our task now is to give it the data and structure he imagined.

Dr Raghubir S Grewal | Chairman, Dr Lime



Maerz EcoKiln Ready, Schaefer Kalk Malaysia, 2026. Image: Maerz Ofenbau AG