DRYCOTEC

NOVEMBER 2025 EDITION
(For Internal Circulation Only)

DRYCOTEC DIARIES

RAJESH JOSHI
Managing Director
STP Ltd (A wholly owned subsidiary of Berger Paints India Ltd)

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Applications : Cement	Benefits : Cement	Applications : Gypsum	Benefits : Gypsum
Skim Coat & Putty	Workability	Manual Plaster	Anti-sag
Tile Adhesive	Anti slip / Anti-Sag	Finishing plaster	Thickening
Manual Renders	Thickening	Spray plaster	Workability
Spray Renders	Open time	Joint filler	Working time
Repair Mortar	Adjustment time	EIFS	Smoothness
	Cost reduction	Spot Glue	Surface hardness
	Bounce back reduction		Reduce chalking
	Application Speed		Application Speed




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* Benefits are also dependent on quality of ingredients, formulation and optimisation of blend.

Editors Page : Life & Beyond

INTUITION OF DEATH

Does death communicate with you before you die?, is there a sign?, scientifically not proven. The wise would say no. My opinion is different. With the recent lose of my father & a little earlier, my sister, some of my thinking has been shaken. I was not there at the time of their death, but I was very much there before they died. I could observe a distinct change in behaviour which was not normal. This happened just few hours before death. So speaking about intuition that death is coming is probably true. I can say that.

WHAT HAPPENS AFTER WE DIE

This question has many answers. All of them are fictional, imaginary, spiritual, or based on certain beliefs. What really happens when you die, well to find it out and get the real picture, you will have to die (LOL). On a serious note, this riddle may remain forever. AI could solve it but how do we prove. Only if someone came back & told us the journey.

REVENGE TAKEN AGAINST THE DISEASE

Cholangiocarcinoma was our enemy. It killed my father. It is a rare, aggressive cancer that forms in the bile ducts, spreads fast and is totally incurable. It won, it succeeded, my father is no more. But I seek revenge & how to do it. Well, I decided to donate the body of my father to conduct research on cancer. It will help doctors to see the metastasis & probably find some solutions. My revenge against the killer is complete.

DEATH TO THE UNCONVENTIONAL

I donated my father's body for the purpose of cancer research to the government hospital which was two hours away & we had to ensure that the process is completed within four hours from the time of death. It was a difficult task and we could do it. However, there was a lot of resistance. Not only from the un-educated but also educated. Not only from the old but also the young. Even our house maid requested that we should ask the hospital to take what they want & give the rest for the final cremation. I understand about many relatives who are currently talking against my decision. I don't care, but our society awards death to all those who go the unconventional way.

ENJOY IT TILL YOU HAVE

We all want to live more. We all want to live heathy and wealthy. We don't want to die soon. Okay, no problem. I would only say that we learn to respect life and also value what we have. Upgrade our knowledge & seriously work out towards maintaining our health. Eat right & exercise well. Boring… please stop your lecture. I know, this you are thinking.

Cool, just forget about this article. I will say – enjoy the winter & the holidays.

Dr. Mandar Chitre
Editor & Founder – Drycotec Diaires
& Drycotec Drymortar Association

My Cement Diaries : Cement Industry Leadership : From Efficiency Gains to Global Benchmarks

Dr S B Hegde can be introduced as Professor, Ex President - Manufacturing (Cement Industry), Global Consultant / Advisor, Domain Expert in Cement in International Bodies and Recipient of the prestigious "Global Visionary Award" (2020). He is a Seasoned, Global and Accomplished Cement Industry Professional, 3 decades of experience with demonstrated history of working both in and outside India.

The decarbonisation of cement is no longer a theoretical debate — it's a strategic leadership challenge for our sector. On 25 September 2025, I had the opportunity to speak at a webinar on Sustainability in Cement hosted by Indian Cement Review. The October 2025 issue has now published key outcomes and perspectives shared by the panel.

This is not just another discussion — it's a roadmap for action.

Technologies can reduce clinker factor and improve efficiency

- Clinker contributes nearly 90% of cement's CO_2 footprint.
- Every 0.01 reduction in clinker factor avoids roughly 8–10 kg of CO_2 per tonne of cement.
- LC^3 & SCMs → 30–40% CO_2 reduction, 20–25% energy saving
- AFR & Biomass → TSR in India can grow from 18% to 30% with structured collection and processing models
- Digital Twins & AI → 10–15% efficiency gains, higher SCM substitution
- Hydrogen & CCUS → Medium-to-long term levers for 70–95% CO_2 reduction
- Policy Reform → Shifting from prescriptive to performance-based standards

India compare to global best practices?

- Ahead in energy efficiency.
- Lagging in key decarbonisation levers:
- Clinker factor ~10% higher
- SCM use 15–20% lower
- AFR 15–20% behind
- Digitalisation gap ~40%
- CCUS almost absent
- Water use 100–200 L / ton higher
- Logistics still road-heavy

Leadership Priorities to Bridge the Gap

- Scale LC^3 & SCMs across all major markets
- Double AFR substitution with strong biomass and waste partnerships
- Deploy Digital Twins & AI in at least 50% of plants
- Launch CCUS pilots linked to carbon credit frameworks
- Reform codes & standards toward performance-based models
- Adopt water-neutral & green logistics strategies

Technical Imperatives Behind the Strategy

- As clinker factor is reduced and AFR use grows, process stability and variability control become central.
- Predictive control, advanced lab automation, and real-time analytics will ensure quality is not compromised.
- AFR success depends not on technology alone but on logistics and policy ecosystems — similar to India's grain supply chain.
- CCUS is not a distant aspiration.
- It must be built into plant design readiness today — with space allocation, integration planning, and shared infrastructure models.
- Plants with digital twins and AI-enabled optimisation have already demonstrated 5–7% lower specific heat consumption and 10–15% higher SCM substitution.
- Digitalisation is therefore a decarbonisation enabler, not a luxury.

Leadership Insight

- The technologies are proven.
- The economics are emerging.
- What we need now is speed, scale, skill, and systemic alignment.

Decarbonisation is not a single silver bullet — it's a portfolio of solutions that demand coordination between industry, policymakers, financiers, and researchers.

Drycotec Drymortar Association

Presents

DRY MORTARS & MORE

CONFERENCE YEAR 2026

Block your date : 18th Feb 2026

Mumbai (Venue to be announced)

Drycotec Dry Mortar Association announces our next "one day conference" which would bring the industry together under one roof to discuss, debate, enable, and empower the entire Industry of India.

Agenda Summary		
Six Power Packed Sessions		
The CEO Panel Business Trends	**The CTO Panel** Innovations & Changes	**The CFO Panel** Challenges & Solutions
Supply Chain Forum Sustainability & Efficiency	**Plant & M/C Forum** The Latest Technology	**The CHRO Panel** People & Performance

Opportunities : Sponsor / Speaking / Attending

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5 bags/min	±50 grams

VT CORP proudly presents its latest innovation — the PMT-DS-1 Open Mouth Bag Packing Machine, designed to deliver exceptional accuracy, high efficiency, and unmatched reliability for your packaging operations.

Key Highlights:

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This ensures:

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My Leadership Diaries :
Rajesh Joshi - Cementing the Future of Dry Mix in India

Managing Director, STP Ltd.
(A wholly owned subsidiary of Berger Paints India Ltd.)

"A leader who built bridges between science, skill, and site."

FROM COLOUR TO CONCRETE — INNOVATION IN EVERY MIX

When Rajesh Joshi first stepped into the paints business, India was still mixing colours by instinct, not by precision. Then came a marketing mind who plugged in a machine and changed the rules — by installing India's first paint tinting machine by Jenson & Nicholson at Navi Mumbai. He was proud as a member of the team driving this innovation. That spark of innovation still drives him today — 35 years later as he leads STP Ltd., transforming it into a powerhouse of Construction Chemicals & Dry Mix Technologies.

BLUEPRINTS OF A BUILDER

Over **26 years** in Construction Chemicals, Rajesh has built an ecosystem, not just enterprises. From **Admixtures and Waterproofing** to **Flooring, Tile adhesives, Plasters, and Repair Mortars**, he has turned technical niches into thriving markets. At **Sika, Parex,** and **Mapei**, he learned **Dry Mix adoption** long before it was mainstream — earning respect across the **mason and applicator community** as a man who understood both the chemistry and the craftsmanship.

GLOBAL VISION, LOCAL WISDOM

With business footprints in 40+ countries, Rajesh brings global best practices home with a practical Indian lens.

Global Travel Stats

- 5 continents
- 40 countries
- Countless lessons turned into local innovation.

As **Vice President** of the **Construction Chemicals Manufacturers Association (CCMA), Indian Flooring Association (IFA),** and **Dry Mortar Association**, he drives collaboration between manufacturers, engineers, and contractors — shaping India's next-generation standards.

DRY MIX: THE REVOLUTION UNDERWAY

Ask him what's next and he'll say with a grin:

"Shortage of sand, space constraints, higher expectations & adoption of newer technologies — all roads lead to Dry Mix." With India now the **world's second-largest tile producer,** Rajesh believes **Adhesives & Ready-Mix Plasters** will define the next decade of construction — driven by speed, quality, consistency, and sustainability. At **STP Ltd.**, under his leadership, decades of waterproofing and bituminous expertise are being re-imagined through new technologies — **merging tradition with technology.**

THE PEOPLE'S LEADER

Colleagues call him the leader who listens first. His offices are known for their energy, laughter, and open doors. Many who once trained under him now head major Construction Chemical firms — a living proof of his legacy of mentorship.

A LEGACY STILL SETTING

From pioneering paint tinting to shaping India's Dry Mix destiny, **Rajesh Joshi** continues to mix innovation with intent. For him, it's not about **how high we build** — it's about how well we build.
"Innovation isn't just about what you invent — it's about what you inspire that makes a difference"
"Our real growth will come when every mason in India knows why the Dry mix matters."

My Materials Diaries : Sanjay Chitnis : The Story of Glass

Sanjay Chitnis, Retired Sr. Vice President (Technical Services), JK Lakshmi cement Ltd. has almost four decades of experience in the field of cement. He is an engineer from the COEP college in Pune, has done his MDI program from Indian Institute of Management, Calcutta, Indian Institute of Management, Lucknow & Indian Institute of Management Ahmedabad. He has also done his MBA from Annamalai University.

Glass has played a significant role in Indian history, with a rich tradition of glassmaking dating back to the Indus Valley Civilization.

Ancient India

- Indus Valley Civilization (3300-1300 BCE Before Common Era): Evidence of glass production has been found in the Indus Valley Civilization, with discoveries of glass beads and other objects.
- Vedic Period (1500-500 BCE): Glass is mentioned in ancient Indian texts like the Rigveda and the Atharvaveda, indicating its importance in Indian culture.

It's believed that glass was discovered accidentally by ancient potters or metalworkers who observed the formation of glassy glazes on ceramics or stones when they were exposed to high temperatures.

Belgium glass has a long history of being renowned for its exceptional quality and durability. Belgian glass is used in various architectural applications, including windows, facades, and structural elements, due to its strength, durability, and aesthetic appeal.

The global glass production reached approximately 250 million tons in 2021. Top 6 world leaders in glass production are China, USA, Germany, France, Japan & India.

In construction glass segment, estimated market value of China glass industry is 31.3 billion $ while 4.86 billion $ for Indian glass industry in year 2024.

India is growing fast especially in flat & solar glass.

There are two main methods of producing glass. The first is the float glass process that is used to manufacture architectural glass, & the second is the glassblowing process that produces containers such as bottles and jars.

Types of Glass

1. **Float Glass**: Float glass is used in windows, mirrors, and other applications that require a high level of transparency.
2. **Tempered Glass** : Tempered glass is used in car windows, shower doors, and other applications where safety is paramount.
3. **Laminated Glass**: Laminated glass is used in car windshields, skylights, and other applications where safety is critical.
4. **Insulated Glass**: Insulated glass is used in windows and doors in homes and buildings.
5. **Low-E Glass**: Low-E (low emissivity) glass is used in windows and doors in homes and buildings.
6. **Mirrored Glass** : used in mirrors, decorative items, and security applications.
7. **Tinted Glass** : used in windows, doors, and other applications to reduce glare and heat gain.
8. **Wired Glass**: it a popular option for fire-rated doors and windows. Wired glass is also used in Skylights, greenhouses, and other applications where safety is critical.

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Cement, pulp-paper industries will need to cut GHG emissions

Vishwa.Mohan
@timesofindia.com

New Delhi: India's all traditionally high-emission industries, including aluminium, cement and pulp & paper, will have to reduce the intensity of their greenhouse gas (GHG) emissions to meet specific targets by 2026-27 compared to a 2023-24 baseline as govt has notified rules for the country's first legally binding emission reduction target for carbon-heavy industries.

The rules, notified by environment ministry on Oct 8, make it mandatory for 282 industrial units to reduce GHG emissions per unit of product beginning 2025-26. These industrial units will be liable to pay a penalty for non-compliance. The rules are notified under the compliance mechanism of Carbon Credit Trading Scheme (CCTS), 2023.

The highest number of industrial units (186) which will have to reduce GHG emission intensity (GEI) within a specified time-period belong to the cement sector, followed by pulp & paper (53), plants that use chlor-alkali process to extract certain chemicals (30), and aluminium plants (13).

GEI targets (in tonnes of carbon dioxide equivalent) for the year 2025-26 have been calculated based on pro-rata basis for the remaining months of current financial year. The overall reduction till 2026-27 ranges from about 3.4% in the cement sector to about 5.8% in aluminium, 7.5% in chlor-alkali and 7.1% in pulp and paper, compared to 2023-24 levels.

In case an industrial unit fails to comply with GEI target or fails to submit carbon credit certificates equivalent to the shortfall, Central Pollution Control Board will impose 'environmental compensation' (penalty). The penalty will be equal to twice of the average price at which the carbon credit certificate is traded during the trading cycle of that compliance year.

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My Repair Experience Diaries

Chirag Gundigara, BE MBA, with 16+ Years of experience in Sales, Marketing & Key Account Management in an international company making packing systems. Decided to undertake some minor work in his own residence. He wanted to fix some tiles in his balcony and Drycotec Diaries wanted to know is experience.

Drycotec Diaries : What was the objective & the purpose of your repair job ?

Chirag : It was a house renovation project & I went through it. It gave me a fantastic "boots on the ground" perspective on the building materials market. While purchasing just four bags of tile adhesive for our balcony (4'x2' tiles), I gained some valuable insights. As a seller and having direct connections with the manufacturers of tile adhesives brands, it would be good for me to share some of my own personal experiences. These are for the readers of Drycotec Diaries.

Drycotec Diaries : Share with us your experiences, observations & important benchmarks

Chirag : Here are my key observations:

- **Tradition vs Technology :**

Many still favour the traditional sand-cement mix for flooring, highlighting a significant opportunity for customer education on the benefits of specialized tile chemicals. I think it also speaks about the untapped market which is yet to be explored.

- **Supply Chain Hurdles :**

These products are often stored in remote corners of warehouses, pointing to challenges in logistics and inventory management for specialized goods. Last mile delivery is still a major factor & since our products are heavy & not in the DIY category, the problem becomes bigger.

- **Availability is King :**

For contractors and end-users, delays are not an option. Consistent product availability is absolutely crucial for winning and retaining customers in this business.

- **The Brand-Price Equation :**

While brand trust is high, the price difference between branded and local options is minimal. The final decision often boils down to performance and immediate availability.

As a supplier of packaging systems to the building chemicals industry, this experience was an invaluable lesson in understanding the end-user's mindset and the real-world challenges our clients face. The best market research often comes from being the customer yourself.

Drycotec Diaries : Yes, certainly the market is still full of contractors who still insist on the traditional methods. Availability & on-shelf presence has been always very critical and we all understand this.

You spoke about Brand trust & I will give it full importance. Just keep sharing such valuable insights and we keep learning from ourselves.

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Cement Makers' Earnings Likely Peaked in Q2

GST cut-led moderation in prices may continue for some months; higher petcoke costs, capacity additions to limit gains

Nikita Periwal

Mumbai: Earnings of India's cement producers are likely to have peaked in the September quarter as prices of the building material are expected to remain flat over the next few months and higher fuel prices and capacity additions would impact profitability.

In September, the government reduced goods and services tax (GST) rates on cement to 18% from 28% earlier, propelling cement-makers to reduce prices. The moderation of cement prices in line with lower taxes is expected to continue over the next few months, which will cap any meaningful upside in cement prices, according to experts.

As a result, the October-March period which usually sees cement prices rise in tandem with higher demand, may not see a proportionate increase in prices this time around. In the September quarter, the average price per bag of cement was ₹372, up 3.7% year-on-year but 1.5% lower sequentially.

"We believe the pricing rally has come to a halt due to monsoons and GST rationalisation; we forecast the next leg of price growth only in Q1FY27E," Nuvama Institutional Equities said.

The impact of higher prices of petcoke in the past few weeks, meanwhile, is expected to start showing in the current quarter as well as the next, as companies start utilising their higher-priced inventory.

Prices of petcoke are now at around $120 per tonne, up by $10 per tonne, which is likely to increase operating costs by ₹30-40 per tonne. Continued

capacity addition is also likely to weigh on the operating margins of companies. As much as 56 million tonnes of capacity is likely to be commissioned in this financial year, which is expected to push utilisations lower.

"With large capacity additions and ramp-ups of underutilised assets, net realisation growth is expected to remain in the low-to-mid single digit range, making the post-monsoon pricing an important monitorable," Nirmal Bang Institutional Equities said in a note.

JULY-SEPTEMBER EARNINGS

The demand for cement is likely to have grown around 4-5% year-on-year during the quarter, while the country's largest players—UltraTech Cement and Adani Cement—are expected to see a double-digit growth in volume led by additional capacities coming on board through their acquisitions.

This could lift the sales of cement companies by 10-15% year-on-year, while profits of cement makers are likely to double, with a low base of the previous year making profits look even more robust.

The quarter will also see a year-on-year growth in earnings before interest, taxes, depreciation and amortisation (Ebitda) on each tonne of cement sold, with the industry average likely to be in the range of ₹850-1,150 per tonne.

- SAND - SILICA
- SAND - QUARTZ
- SAND - RIVER
- SAND - DOLOMITE
- POWDER - DOLOMITE
- POWDER - BENTONITE
- POWDER - BARYTES
- POWDER - CALCITE
- POWDER - SLATE
- POWDER - SILICA
- POWDER - TALC
- POWDER - QUARTZ
- POWDER - WHITENING
- RED OXIDE
- YELLOW OXIDE
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My Leadership Diaries :
"When the Boss's Mood Overrides Merit : Who Really Pays the Price?"

Niranjan Mishra, a Mentor | **Former Corporate Leader (Ex-President JK Cement)** | Multi-Industry Expertise | Startup Advisor | Music Enthusiast, has written this extremely interesting article & we are publishing it for our readers.

In his previous post, he had highlighted how trust, transparency, and team loyalty (3T's) are essential to building high-performing teams and are very strong imperatives for effective leadership. This article explores a quieter, often overlooked challenge: what happens when a leader's mood outweighs the merit of ideas/proposals? When emotional state drives decisions, innovation stops, initiative fades, and opportunities slip away—often unnoticed but deeply felt across the organization, and the competition never fails to notice.

Mood Over Merit : The silent predator :

In many workplaces, employees first assess the boss's mood before sharing ideas. If the timing feels wrong, ideas are shelved—or dropped entirely. Two forces drive this:

Emotional Decision-Making: Leaders let mood override logic and ignore its intrinsic value. Risk Avoidance: Employees, sensing volatility, hold themselves back to avoid rejection or embarrassment.

The Hidden costs:
This approach impacts organizational momentum in several ways:

Missed Opportunities: Timely, high-potential ideas are delayed or lost. Poor Fit Later: When revisited later, ideas may no longer be relevant or less impactful. Cultural Erosion: Over time, innovation gives way to silence, and initiative turns into inertia, and the journey towards extinction begins.

Hesitant employees aren't the problem — inconsistent leadership is:

In rigid hierarchies, emotional volatility at the top breeds silence and inaction below. When people have to "read the room" before sharing ideas, trust and transparency have already been compromised.

Leadership Is Emotional Maturity:

Strong leaders separate mood from merit. They make decisions rooted in fairness, clarity, and strategy—not emotion. In doing so, they create cultures where people speak up confidently, knowing they'll be heard regardless of the day's emotional weather.

Lessons from Cricket
Cricket offers useful parallels:

MS Dhoni and Rohit Sharma's Early Career Trajectories. Rohit Sharma's early inconsistency could have ended his career—but MS Dhoni persisted with him, based on potential and merit, not mood or public pressure. That faith eventually gave the game one of India's greatest white-ball openers.

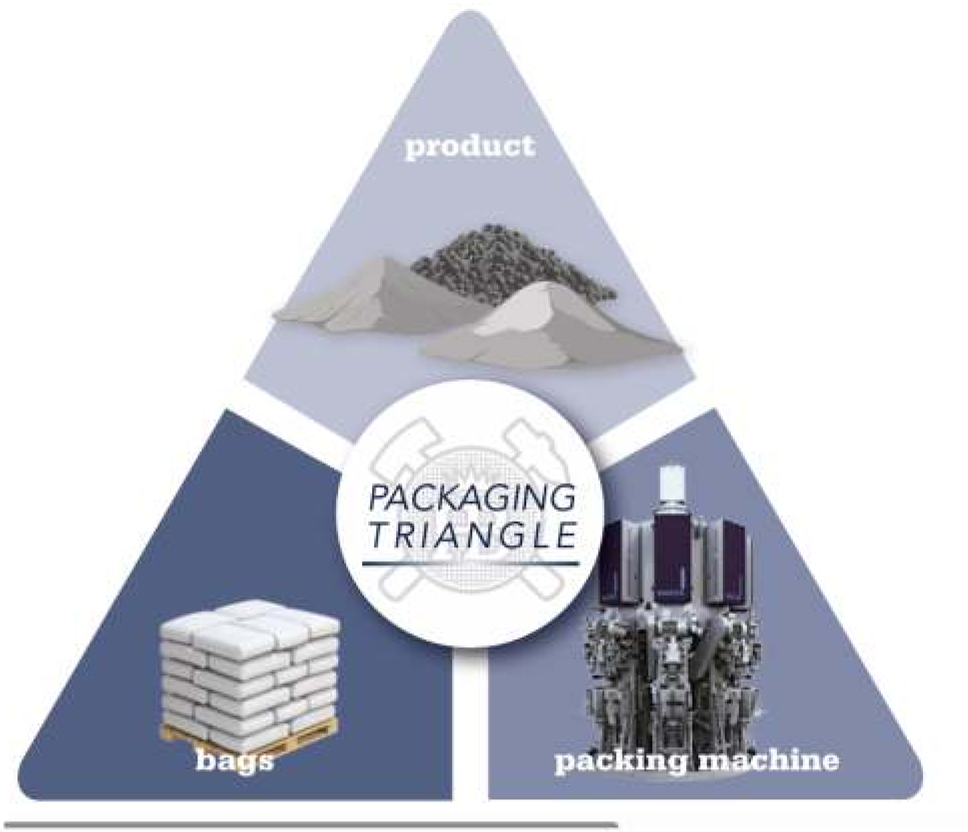
Sourav Ganguly's Backing of Young Talent:

Under immense pressure, Ganguly continued supporting young players like Harbhajan Singh, Yuvraj Singh, and Zaheer Khan. His decisions weren't always popular—but they were based on merit and potential, not emotional whims. The above examples are ample proof of the fact that a leader's ability to rise above external and internal emotional noise can shape a winning legacy.

To conclude, real leadership begins when emotion steps aside and fairness takes the lead. It's not about louder voices, but wiser ones. Leaders who choose merit over mood don't just run teams—they build legacies.

WE DO WHAT WE KNOW AND WE KNOW WHAT WE DO!

Mastering the interaction within the packaging triangle between product, packaging material and machine technology is the basis of our expertise and the starting point to make your process flow perfectly.



Sustainability for a livable future

Sustainability is a core value for us: We make decisions taking into account long-term consequences for the HAVER & BOECKER family, for the entire universe of our customers and for the well-being of future generations. We follow this fundamental approach and strive with all our technologies to improve living conditions for humanity. That's our mission!

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...linked to export delivery not treat- ed as supplies

charge," the statement said.

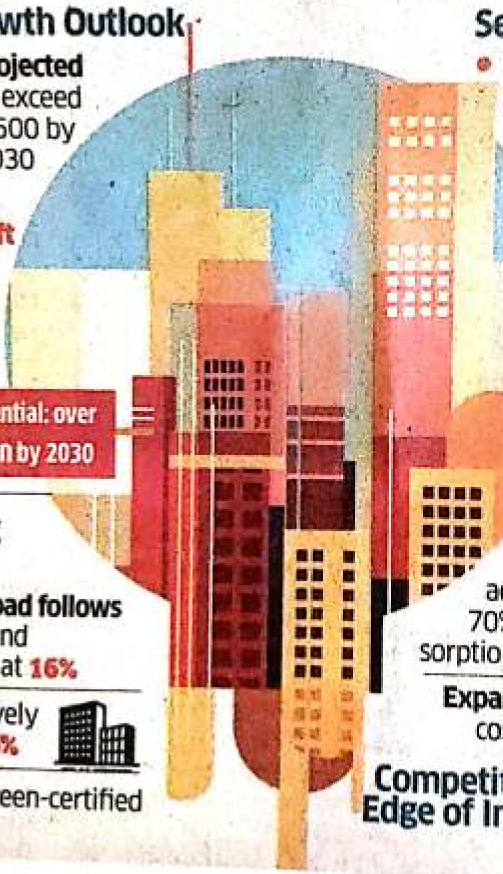
WAY AHEAD

In a paper submitted to the Fi-

firm that Nil valuation and refund eligibility apply where export con- tracts and foreign-exchange real- isation are documented."

GCCs to Drive Next Growth Wave in India's Office Mkt

India's office market is set for another growth phase, specifically powered by Global Capability Centres (GCCs) that continue to drive leasing activity and long-term occupier demand. GCCs are expected to lease an incremental 50-55 million sq ft of Grade A office space during FY2026-FY2027, accounting for nearly 40% of the total demand in India's top six office markets, showed an assessment by rating agency ICRA. The rapid expansion of GCCs has emerged as one of the key growth drivers for India's commercial office real estate sector in recent years. Their incremental demand for leased space signals a strong long-term commitment and strategic growth by global enterprises in India



GCC Footprint and Growth Outlook

- **1,700 GCCs** currently operational across India
- **Projected to** exceed 2,500 by 2030
- **Expected incremental leasing: 50–55 million sq ft** (FY26–FY27)
- **Share in overall office demand: 38–40%** across top-6 cities
- **Workforce expansion: 1.5-2x**

Revenue potential: over $100 billion by 2030

City-wise GCC Leasing Share (FY23–FY25)

Bengaluru leads with **40%** share of GCC leasing

Hyderabad follows at **18%** and Chennai at **16%**

NCR, MMR and Pune collectively account for the remaining **26%**

Majority of new leasing in green-certified integrated tech parks **(65%)**

Sectoral Evolution

- **Technology occupiers** continue to dominate GCC demand
- **Engineering & Manufacturing** share rose from **12 to 25%** (FY18–20 to FY23–25)
- **BFSI segment** increased from **15 to 21%** in the same period
- **GCCs shifting** focus from back-office to innovation, R&D, AI and digital transformation

Global Origins of GCCs

US-based GCCs lead, accounting for 70% of total absorption since 2021

Growing participation from UK, Germany, France, Japan, Australia and Singapore

Expansion driven by India's talent base, cost advantage and policy support

Competitive Edge of India — **Grade A rentals in India: $1-2 per sq ft** per month, among the lowest globally

TEXT: KAILASH BABAR, GRAPHICS: YOGEESH

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Decarbonization in Cement : From Challenge to Competitive Advantage

Practical pathways driving the cement industry toward net zero

Girish Kumar - Plant Director

Riyadh Cement, Saudi Arabia

Practical Solutions in Cement Decarbonization

- **100% Recycling of Alkali Bypass Dust** – reused in both cement grinding and raw
- mix preparation, eliminating disposal and reducing emissions.
- **Co-processing Hazardous Wastes** – iron sludge (2–4%), used oil blended with HFO, used grease, and shredded filter bags safely co-processed in the kiln.
- **Clinker Factor Reduction** – pozzolana and industrial byproducts added in OPC and blended cements to cut process emissions.
- **12 MW ORC-based Waste Heat Recovery** – water-free Organic Rankine Cycle technology using cyclopentane, an eco-friendly and efficient alternative to steam-based systems.
- **Operational Energy Efficiency** – replacing airlifts with bucket elevators to optimize power consumption.
- **Tree Plantation Programs** – creating natural carbon sinks within plant premises, contributing to long-term sustainability.

Cement production accounts for nearly 7–8% of global CO_2 emissions, making it one of the most critical sectors in the global decarbonization agenda. The dual challenge lies in its reliance on energy-intensive processes and the inherent CO_2 released during limestone calcination. Addressing these emissions requires a combination of immediate efficiency measures and long-term technological transformation. Across the industry, progress is being made on multiple fronts. Alternative fuels and raw materials are reducing dependence on fossil energy, while clinker substitution directly cuts process emissions. Digitalization and Industry 4.0 tools are enabling real-time monitoring, optimized kiln performance, and improved energy utilization. Carbon capture, utilization, and storage (CCUS) is fast emerging as a pivotal solution, despite high capital requirements

Equally significant is the integration of circular economy principles. Co-processing of municipal, healthcare, and industrial wastes not only substitutes conventional fuels but also provides safe disposal routes for otherwise hazardous materials. Low-carbon cements, incorporating fly ash, slag, calcined clays, or bypass dust, are gaining acceptance in global markets. Hazardous wastes such as alkali bypass dust, iron sludge, and sterilized medical waste are increasingly being reused as raw mix inputs or co-processed in kilns, creating a win–win for waste management and emissions reduction.

Riyadh Cement has been pioneering several of these pathways.

A landmark initiative is its 100% recycling of alkali bypass dust—reintroduced both during cement grinding and at the limestone stockpile stage—effectively converting a challenging waste into a cementitious resource. Similarly, hazardous waste iron sludge (2–4%) is co-processed in cement grinding, aligning with global best practices. On the energy front, Riyadh Cement operates a **12 MW Waste Heat Recovery (WHR) system based on Organic Rankine Cycle (ORC) technology.** Unlike conventional steam-based systems, ORC uses cyclopentane as an organic fluid and requires no water, making it an eco-friendly and efficient innovation. Energy efficiency has been further enhanced through operational improvements such as replacing airlifts with bucket elevators and introducing Roller Presses with the conventional Ball mills grinding circuits.

On the product side, clinker factor reduction remains central, with pozzolana and other industrial byproducts used in multiple cement grades. Complementing these technical measures, tree plantation programs within the plant premises add natural carbon sinks and reinforce long-term sustainability.

These combined initiatives illustrate that decarbonization is not a distant aspiration but a practical, achievable pathway. They demonstrate how the cement industry can move beyond compliance, transforming sustainability into a competitive advantage while laying the foundation for a low-carbon future.

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My Technology Diaries : Surface Preparation

Preetam Aasish Addepally is experienced professional in the water proofing & Construction Chemicals Sector, with more than a decade of experience. He is a civil engineer from the Gitam University, Vizag & has also done his post graduate Advanced Construction Management degree from the NICMAR University.

Preetam has worked in many top brands like Pidilite, Nina Percept, Jesons, Kalpataru & Nerolac Perma CC Division. In this article he shares his experience for the readers of Drycotec Diaries.

"Surface preparation is not just a preliminary step—it's foundational to the success of any waterproofing project" Lets understand why? Surface preparation is critical in waterproofing because it directly affects the performance, durability, and adhesion of the waterproofing system.

Here's why surface preparation is so important:

1. Ensures Proper Adhesion :

- Waterproofing materials—whether membranes, coatings, or sealants—need to bond tightly to the substrate.
- Dust, dirt, oils, old coatings, or laitance can act as a barrier, preventing adhesion and causing failure.

2. Identifies and Repairs Surface Defects :

- Cracks, spalls, honeycombing, or voids must be identified and repaired before waterproofing.
- Unattended defects can allow water ingress beneath the waterproofing layer, compromising the system.

3. Provides a Stable and Uniform Base :

- A level, smooth, and consistent substrate is essential for uniform application and performance.
- Irregularities can lead to inconsistent thickness- Impacting curing of the membrane applied, weak points, Excess material consumption or ponding of water.

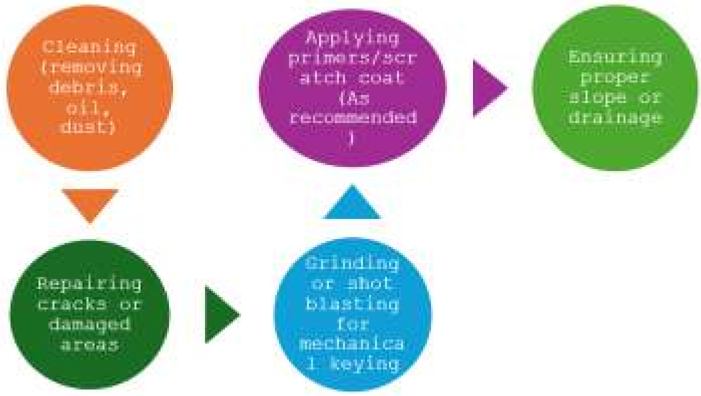
4. Prevents Trapped Moisture :

- Surfaces should be dry or moisture-tolerant depending on the waterproofing product.
- Trapped moisture can lead to blistering, delamination, or mold growth behind the waterproofing layer.

5. Increases Lifespan and Reliability :

- Proper surface preparation helps the waterproofing layer perform optimally over its intended life.
- It reduces maintenance needs and the risk of costly water damage repairs later on.

Typical Surface Preparation Steps Include:



Skipping or poorly executing this step often leads to premature failure, wasted materials, strained client- water proofer relationship, loss of credibility and additional costs (Material & Labor).

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SYSTEM HIGHLIGHTS

Step 1: Surface Preparation → **Step 2:** Dual coat with MCON Magic Coat 2K → **Step 3:** Screeding with MCON Magic Screed EP → **Result:** Fully waterproof, long-lasting terrace

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