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Editor's Page

Dr. Mandar Chitre

Editor & Founder
Drycotec Diaries &
Drycotec Drymortars

About The CHANGE

In the last seven years, Drycotec Diaries was designed by an agency. We paid them a retainer fee and they ensured that the magazine was prepared in time & delivered a flawless performance. But this issue is completely different: The 86th issue of Drycotec Diaries is designed totally by AI & AL & there has been absolutely no involvement of the agency. They have lost the business and will have to let go of my monthly payment.

About The OFFERING

I hate such things. Somebody who supported you for 85 months cannot be let go just because of technology. We are human beings and should respect relationships. When I realised that AL has the potential to design the entire issue & also improve the quality, the first thing done was to communicate with them. It was made crystal clear that their effort is now being replaced by AI but nothing to worry. I offered them a revenue sharing more many shop keepers refused my offer.

About The EXAMPLES

So you have to change, there is not alternative. My sincere apologies to the agency which designs Drycotec Diaries for 85 months. Sorry, In the best interest of the company, we take a bow & say goodbye to you. Thank you for your efforts.

Dr. Mandar Chitre

Editor & Founder
Drycotec Diaries & Drycotec Drymortars
Association

About The FAIRNESS

Naya Daur, was a classic movie, in which Dilip Kumar, a horse chariot driver, challenged the motorized taxi. In the movie, he wins the race and there is a happy ending. However, in real life, technology has always won against human effort. The entire bunch of horse & bullock carts have been replaced by Auto rickshaw & Taxis. Passengers book app cabs and save time as well as money. Business can go bankrupt if they do not change.

Another example of Video Cassette libraries, In the early 90s, they flourished and many shop keepers converted to this business. Today they have vanished and the same shops are doing some other things.

So you have to change, there is not alternative. My sincere apologies to the agency which designed Drycotec Diaries for 85 months. Sorry, In the best interest of the company, we take a bow & say goodbye to you. Thank you for your efforts.





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THE PLANT & MACHINERY PANEL

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Important: "ON-THE-SPOT" REGISTRATION OR ENTRY IS STRICTLY NOT ALLOWED

BRANDS SUPPORTING OUR CONFERENCE:



My Building Code Diaries: Purple Building Certification

Sanjay Chitnis

Retired Sr. Vice President (Technical Services), JK Lakshmi Cement Ltd.



Sanjay Chitnis has almost four decades of experience in it field cement. An engineer from COEP Pune, he has completed management programs from IIM Calcutta, IIM Lucknow, and IIM IIM Ahmedabad, and also holds an MBA from Annamalai University. Known for his punctuality, grounded personality and engineering knowledge, he regularly writes insightful Sunday articles on LinkedIn. One such article is presented here for the benefit of readers.

Understanding the Purple Building Certification Scheme (PBCS)

In today's rapidly evolving digital landscape, accessibility has emerged as a critical priority worldwide. Accessibility standards ensure that individuals with disabilities have equal access to technological and physical environments.

The Purple Building Certification Scheme (PBCS) is India's first national accessibility rating system for buildings. It was launched by Union Minister Shri Nitin Gadkari on December 4, 20, 25, to ensure barrier free, inclusive spaces.

It is developed by Andhra Pradesh MedTech Zone (AMTZ) with support from ICMR and the Inclusive Divyangian Entrepreneur Association (IDEA).

The scheme evaluates buildings based on universal design principles and aims to bring India at par with European and US accessibility standards.

Key Accessibility Parameters

- **Ramp Gradient:** 1:12 slope, non-slip, handrails on both sides
- **Door Width:** Minimum 900 mm
- **Elevators:** Wheelchair-friendly, Braille buttons, auditory signals
- **Toilets:** Accessible toilet per floor, grab bars, raised seat, emergency call
- **Signage:** High-contrast fonts, Braille/tactile maps, audio announcements
- **Pathways:** Tactile flooring for visually impaired
- **Emergency Exits:** Accessible evacuation routes with audible and visual alarms



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1942-2025

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My Cement Diaries:

A Media Report

Company-wise Performance of Top Cement Brands

Market Overview

The Indian cement industry faced a challenging Q3 FY2025, with **pan-India cement prices declining by approximately 3%** during October-December period. The average price per 50 kg bag fell to ₹333 from ₹372 in Q2 and ₹369 in Q3 FY2024. Southern and eastern regions saw the steepest price drops, driven by GST revision-led moderation and weak non-trade demand.

Financial Performance

Despite strong volume growth, **profitability is expected to be the lowest in four quarters**. Industry-wide **Ebitda per tonne** is projected to range between ₹750-1,050, compared to over ₹1,000 in H1 FY2025. Rising pet coke prices and depreciation costs have eroded margins. According to ICRA, operating margins may decline by **130-180 basis points YoY**, settling around **15.6-16.1%**.

Demand Trends

Cement demand improved sequentially in Q3, recovering from an H1 impacted by prolonged monsoons and delayed infrastructure spending. **YoY volume growth is estimated at 7-9%**, potentially reaching **13-17% with acquisition-led expansion**. The demand uptick saw supported by housing and real estate momentum, especially under government schemes like **Pradhan Mantri Awas Yojana (PMAY)**.

Capacity Expansion and Pricing Outlook

The industry is poised for significant capacity additions—**150 million tonnes over the next two years**, increasing total capacity by **20-25%**. This supports long-term growth, but may restrict near-term price hikes due to oversupply. Utilization rates are expected to remain moderate at ~70%.

Strategic Implications

- ✓ **Operating leverage gains are limited** due to weak non-trade pricing.
- ✓ **Net profit may still rise YoY**, aided by volume growth and a low base.
- ✓ **Price recovery remains uncertain**, with analysts cautious amid capacity expansion and regional disparities.

Conclusion

The December quarter reflects a paradox: **strong demand but weak profitability**. Cement companies must navigate cost inflation, pricing pressures, and competitive dynamics from new capacity strategically. Strategic focus on cost optimization, regional pricing strategies, and leveraging government infrastructure push will be key to sustaining margins.



THE DRY MIX INDUSTRY IS SCALING FAST & THE SMART MANUFACTURERS ARE PROTECTING THEIR MARGINS.

The Indian dry mix mortar market is projected to grow from **~10.3 million tons in 2025** to **~14.4 million tons by 2030**, at a **~6.9% CAGR**.



This growth reflects a clear industry shift away from on-site mixing toward factory-engineered, performance-consistent building materials.

 **GROWTH IS GUARANTEED. MARGINS AREN'T.**

PACKING ACCURACY + SPILLAGE FREE = PROFIT CONTROL

 A COMMON “SAFE MARGIN” OF JUST 100 GRAMS EXTRA PER BAG CAN QUIETLY DRAIN PROFITS.

The math manufacturers overlook:

5 bags/min | 16 hrs/day | 312 days/year

Annual material loss: **~1,49,760 kg**

Cost impact: **~₹15 lakhs per machine/year**

 **Annual material loss per machine:**
~149,760 kg ≈ ₹14.97 lakhs (at ₹10/kg)



**PACKING ISN'T THE LAST STEP —
IT'S A CRITICAL COST CENTRE.**

Annual Business Impact:

- ✓ Product loss saved: **~₹15 lakhs**
- ✓ Power & air savings: **~₹1.75 lakhs**
- ✓ Total savings: **~₹16.75–16.80 lakhs/year**

WHERE DRY MIX MANUFACTURERS ARE LOSING LAKHS,
VT CORP REVEALS THE HIDDEN GAPS.



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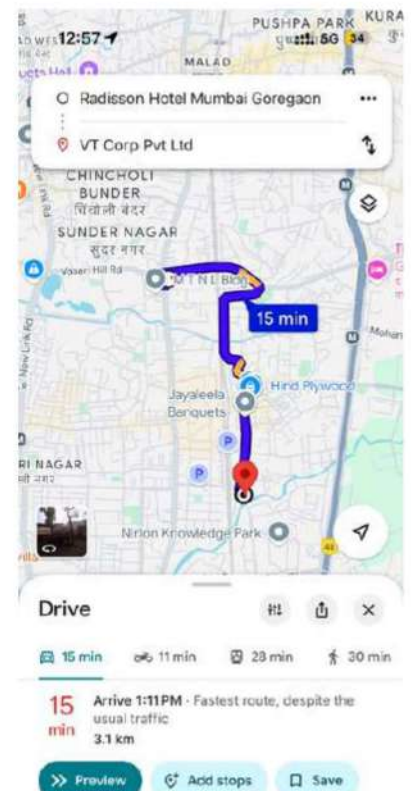
VT CORP is happy to announce that we will be participating in :-

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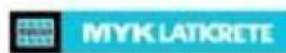


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My Industry Diaries: Wall Putty



A ChatGPT Report : Market Overview

The Indian wall putty market is a fast growing segment within building materials and decorative finishes industry. Growth in by residential construction, renovation activity, and rising consumer preference for better surface aesthetics, Industry estimates the Indian wall putty market size in the range of USD 4000–500 million (2024) with a CAGR of 6–7% over the medium term.

Leading Brands & Estimated Market Shares

- Birla White –~20%
- JK Cement –~15%, key/ brand recall and nationwide distribution,
- Asian Paints –~12%
- Early may advantage and wide penetration in tier-2 and tier-3 cities.
- Ultratech Cement –~10%
- Stronger engineering cement product and nationwide distribution,
- Ultratech Cement –~10%
- Growth in renovation and repainting cycles, especially in urban housing.

Industry Trends

- Shift from gypsum/POP to white cement putty for better finish and paint durability.
- Premiumization. Rising demand for water-resistant, crack-resistant, fibre-reinforced and low-VOC putties.
- Entry and expansion by paint majors, using strong retail and contractor networks.
- Growth in renovation and repainting cycles, especially in urban housing.
- Increased focus on sustainability, packaging efficiency, and reduced material wastage.

Outlook

The Indian wall putty market is expected to steady growth, supported by housing demand, renovation activity, and increasing preference for premium wall finishes. Brands with strong distribution, contractor engagement, and differentiated product offerings are best positioned to gain share.

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Frank Ormalsh
Head of Business Unit
Cement
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My Plastering Diaries

Report by Girja Shankar Singh



Plastering Basics & Standard Thickness

What is Plastering?

- ✓ Covering walls & ceilings with cement or gypsum mortar to
- ✓ Obtain a smooth finish
- ✓ Protect from weathering
- ✓ Improve durability & appearance



Common Plaster Materials



Cement Mortar
(Cement + Sand + Water)



Gypsum Plaster



Lime Plaster

Standard Plaster Thickness

(Note: Use proper curing after each coat)

Internal Wall	External Wall	Ceiling Plaster	RCC Surface
12mm Single Coat	15–20mm (total)	6–10mm	6–10mm ► With Bonding Agent

Standard Mortar Mix Ratios

Internal Walls	External Walls	Ceiling
1.5 or 1.6	1:4	1:3
(Cement + Sand)		

Important Tips

- ✓ Clean & Rough Surface
- ✓ Cure Masonry Well
- 🔪 Hacking on RCC
- ⌚ Proper Curing (7 Days)



Cracks



Debonding



Efflorescence



Hollow Sound



Hollow Sound



Hollow Sound

Weak Pricing, Cost Surge to Cloud Cement Cos' Q3 Show

Nikita Periwal

Mumbai: Cement companies are expected to report weaker-than-usual earnings for the December quarter, as GST revision-led moderation in prices, weak demand from the non-trade segment, and higher cost of raw materials weigh them down.

Compared to the seasonally weak September quarter, cement prices were down about 3% pan-India in the October-December period, with southern and eastern India seeing the sharpest declines. While the period marked the first full quarter after the GST rate cuts, cement prices were weaker even when adjusted for the GST revision, analysts said.

The average price of cement pan-India per bag of 50 kg was around ₹333 in the December quarter, down from ₹372 per bag in the September quarter and ₹359 in the comparable quarter last year.

The weakness in prices, along with higher prices of pet coke, will impact the earnings before interest, tax, depreciation and amortisation (Ebitda) of cement producers. The industry's average Ebitda per tonne is likely to range from ₹750-1,050 in the December quarter, down from more than ₹1,000 in the first half of 2025, with Shree Cement likely to top the charts, according to analysts.

The profitability would be lower for the second quarter in a row, and is likely to be at the lowest level in four quarters, they said. Despite robust volume growth generating operating leverage for companies during the quarter, this impact is expected to be eclipsed by a continued weakness in pricing.

"Weak non-trade prices during Q3 will erase the operating leverage gains and consequently result in unit Ebitda fal-



ling," said analysts at Emkay Global.

The net profit made by companies, though, is expected to be significantly higher compared to the previous year, largely led by a growth in volume.

"YoY growth is largely due to low base, given the past year's Ebitda/tonne, which was down ~35% YoY, along with the benefits of inorganic growth, driven by softening in trade segment prices and a sharp fall in prices in the non-trade segment," said Elara Securities.

The industry is likely to report a 7-9% year-on-year growth for the December quarter, and coupled with acquisition-led growth, this growth is seen to be much higher at 13-17% for the quarter. While the

momentum in volume growth for cement makers is expected to continue, analysts are not as sure of prices moving in tandem.

Motilal Oswal said in a pre-earnings note that "a strong pipeline of capacity addition in the near to medium term could restrict a sustainable material price hike in the medium term".




The domestic industry is expected to add close to 150 million tonnes of production capacity in the next two financial years, increasing capacity by nearly 20-25%.

**Earnings
Preview**

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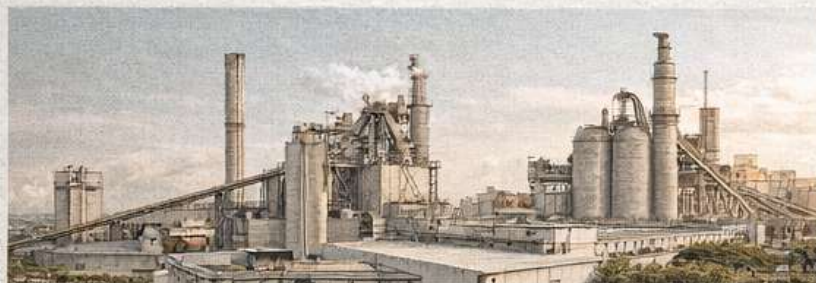
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My Cement Review



Company	Revenue Q3 FY2024-25 (₹ Crore)	Revenue Growth YoY (%)	Net Profit Q3 FY2024-25 (₹ Crore)	Net Profit Growth YoY (%)	Key Highlights
 UltraTech Cement Ltd.	16,328.43	1.20	1,785.92	22.28	Marginal revenue growth; profit impacted by higher operational costs and fuel prices.
ACC Ltd.	5,175.96	6.52	1,475.32	105.22	Strong revenue and profit growth driven by operational efficiency and pricing strategies.
 Ambuja Cements Ltd.	4,850.02	9.67	1,083.99	59.31	Robust revenue and profit growth due to efficient production and cost management.
Shree Cement Ltd.	4,235.49	-13.08	259.00	-73.20	Revenue and profit declined due to slower demand and higher input costs.
J.K. Cement Ltd.	2,715.48	-2.49	294.84	-28.94	Slight revenue and profit decline amid cost pressures and market slowdown.
India Cements Ltd.	903.16	-16.52	122.30	Turn from loss	Significant revenue decline; net profit turnaround from loss.
Dalmia Bharat Ltd.	3,181.00	-11.70 (YoY)	66.00	-75.20 (YoY)	Marginal QoQ growth but YoY decline; net profit fell sharply YoY but rose QoQ.

Sources : ICRA Cement Sector Report & Axis Securities Q3FY25 Preview





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Procurement, Sourcing, and Purchasing – What's the Difference?

These terms are often used interchangeably, but they serve distinct and critical roles within an organization. Understanding the difference can significantly improve decision-making and operational efficiency.

◆ Procurement

The strategic, end-to-end process that includes planning, acquiring, managing, and evaluating goods or services across their entire lifecycle.



◆ Sourcing

The strategic activity of identifying, evaluating, and selecting the right suppliers to meet business requirements.



◆ Purchasing

The **transactional execution** — placing purchase orders, receiving goods or services, and processing payments. A key subset of procurement.



Why this matters:

When teams clearly understand these roles, organizations can:

- ✓ Improve efficiency
- ✓ Strengthen supplier relationships
- ✓ Reduce risk
- ✓ Optimize costs
- ✓ Drive long-term value



Author : Muzaffar Husain, DGM, ATS Homekraft



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OPC Concrete

Strength & modulus
loss, spalling risk

OPC + GGBS

Similar or slightly
better, depends on GGBS %

OPC + GGBS + Steel Fibres

Improved residual
toughness, reduced
spalling

OPC + GGBS + Ultrafine GGBS + Steel Fibres

Highest residual strength,
much reduced spalling risk

OPC + Fly Ash

Variable, small-
moderate FA ~
performance

OPC + Ultrafine GGBS or + Microsilica

Higher residual strength
but increased spalling risk

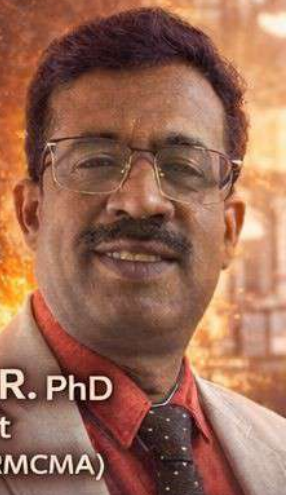
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Dr Manjunatha L.R. PhD
Concrete Technologist
City & Guilds (UK) & CTI (RMCMA)



My Tiling Diaries

– By Deepak Goswami

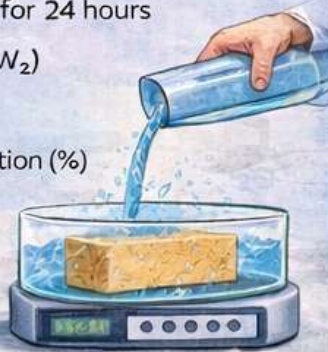
Important Tests for Floor Tiles

Water Absorption Test IS 13630

- 1 Immerse tile in water for 24 hours
- 2 Weigh saturated tile (W_2)
- 3 Dry, weigh again (W_1)
- 4 Calculate water absorption (%)

$$\text{Water Absorption (\%)} = \frac{W_2 - W_1}{W_1} \times 100$$

✓ Value $\leq 0.5\%$ (Min.)



Breaking Strength Test IS 13630

- 1 Place tile in testing machine
- 2 Apply & increase load until failure
- 3 Record the breaking load (N)

$$\text{Water Absorption (\%)} = \frac{W_2 - W_1}{W_1} \times 100$$

✓ Value $\leq 0.5\%$ (Min.)



Surface Abrasion Test IS 13630

- 1 Mount tile in abrasion machine
- 2 Run 1000 cycles
- 3 Measure depth of abrasion

✓ Depth $\leq 175 \text{ mm}^3$ (Max)



Scratch Hardness Test MOHS Scale

- 1 Scratch tile surface with MOHS pick, No. 6
- 2 Verify scratch or no scratch

> 26 (56) =
Safeguard
Against Scratches



Skid Resistance Test IS 13630

- 1 Test tile by sliding rubber sole slider
- 2 Find slip resistance, angle of inclination

> 0.6 (Safeguard Against Slipping)



Impact Resistance Test IS 13630

- 1 Drop 1 kg steel ball from 90 cm height
- 2 Check tile for cracks or damage

> Angle > 34°



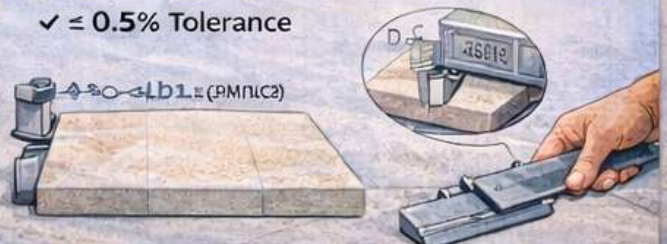
Dimensional & Visible Defects Test

- 1 Measure tile size $\pm 0.5\%$ of tile size
- 2 Check tile surface for visual defects,
 - cracks,
 - Colour variations, etc:



DIMENSIONAL & VISIBLE DEFECTS TEST IS 13630

✓ $\leq 0.5\%$ Tolerance





ISO 9001:2015

R.S. ENTERPRISES

SUCCESS STORY WITH SCHWING STETTER INDIA PVT. LTD.



PROJECT OVERVIEW:

- Client: Schwing Stetter India Pvt. Ltd.
- End User: Kajaria Tiles (Dry Mix Division)
- Location: Kajaria Mfg. Facility, Rajasthan
- Scope of Supply: Impeller Type Open Mouth Bag Packaging Machines alongwith Industrial Stitching Conveyors
- Automated Weighing & Bagging Systems
- Material Handled: Dry Mix Mortar, Tile Adhesives, Plaster, etc.
- Packing Range: 20kg to 50kg



FIRST MAJOR ORDER COMMISSIONED ! A NEW MILESTONE ACHIEVED

R.S Enterprises proudly announces the successful installation and commissioning of our state-of-the-art Electronic Impeller Type Packaging Machines at the Kajaria Tiles Dry Mix Plant, a prestigious project executed through Schwing Stetter India Pvt. Ltd. This accomplishment marks a major breakthrough as R.S Enterprises becomes an officially registered vendor with Schwing Stetter India one of the most respected players in India's construction equipment industry.



EXPANDING HORIZONS:

Following this successful commissioning, R.S Enterprises is now collaborating on additional projects with Schwing Stetter India for their upcoming Dry Mix Mortar Plants across the country. Our partnership is growing stronger, underpinned by mutual trust, innovation, and performance.

OUR COMMITMENT:

At R.S Enterprises, we are driven by the belief: "Protecting What Builds the World." We offer robust packaging automation tailored for the Cement, Ready-Mix, Wall Putty, Tile Adhesive, and Mineral sectors.

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- Cellulose Fibre



- Pigment Dispersion



- Gold Bronze Powder



- Cyclohexane / Cyclohexanone
- MEK Oxime



- Acrylic Polyol & SCA
- Castor Oil based Polyol
- Unsaturated Polyester Resin
- Alkyd & Polyester Polyol



- Solvent Dyes



- Carbon Black



- Biocides



- CAB/ CAP/ CA/ Solus
- CPO
- Polyester Resin
- Phthalate Free Plasticizer



- Fumed Silica
- Crosslinkers
- Organosilane



- Speciality Fillers



- Photoinitiators
- Oligomers & Monomers



- Organic Pigment & Anti-corrosive Pigment



- Synthetic Iron Oxide



- MHEC & HEC
- VCVA Co-polymer



- Light Stabilizer & UV Absorber



- Dispersible Polymer Powders
- Silicone Emulsions & Water repellent
- Silicone Resin



- VCVA Terpolymers



- TPA Resin



- Rosins
- Hydrocarbon Resin
- Acrylic & XSBR Emulsion
- APO



- Silica Matting Agent
- EVA Copolymers



- DISPERMAT® Dispersers, mixers, stirrers, basket mills & bead mills.

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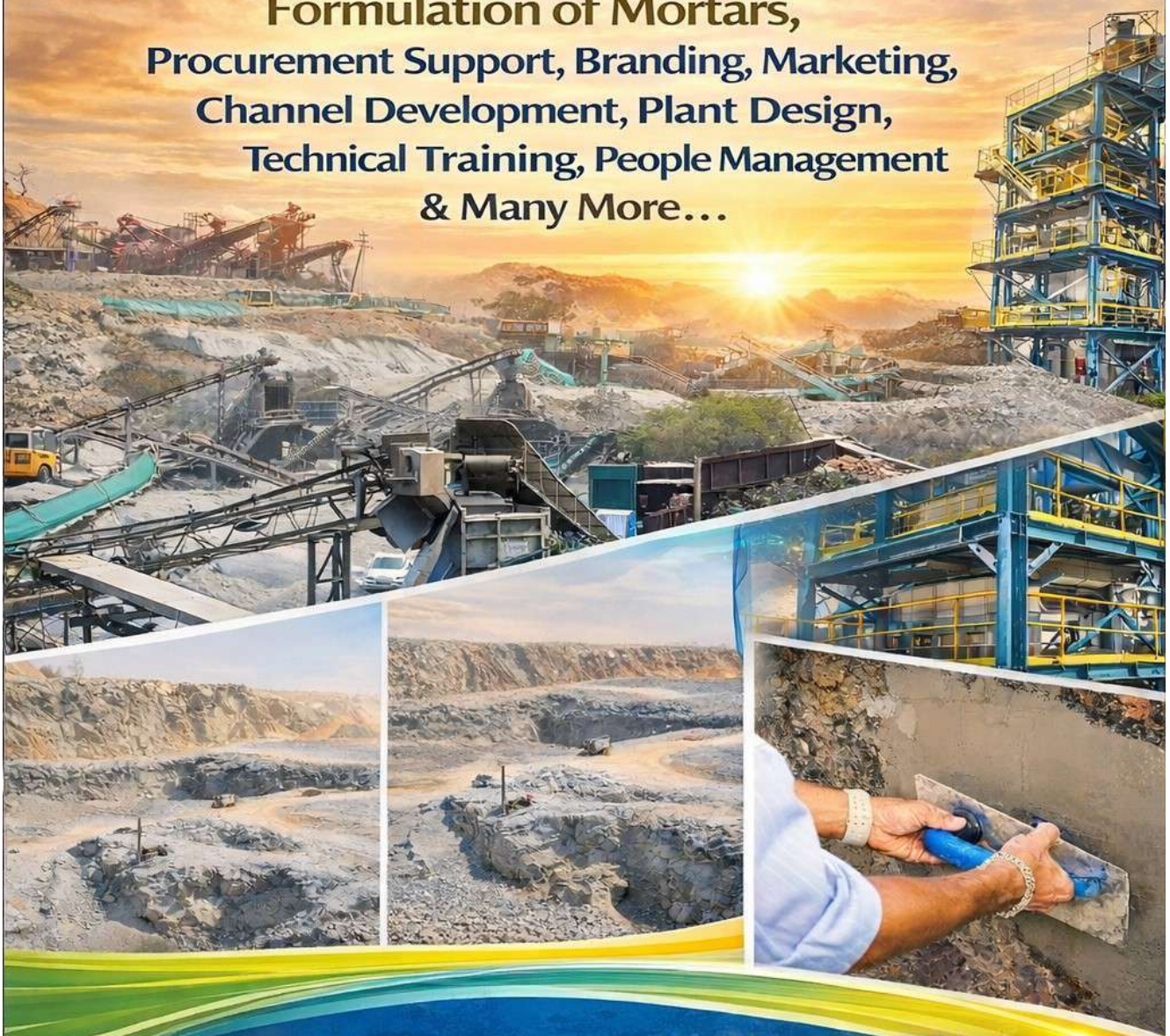
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