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- Iron & Steel Industry- The challenges ahead
- Upgradation in Steel Rolling Technology of Long Products
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## Editorial Desk



**D. A. Chandekar**  
Editor

*Dear Readers,*

In last few decades, the world had seen the emergence of the concept called 'Globalization'. An international body 'World Trade Organisation' or commonly known as WTO, was formed in 1995 to facilitate international trade. The idea was the countries should gradually decrease the trade barriers and encourage the international trade. This concept got the support of majority of the countries and accordingly the process of lowering the trade barriers started in many countries. India along with many countries is the original signatory of WTO and since it adopted the principles of liberalization and globalization in 1992, the import tariffs were being lowered gradually. This did have a positive impact and the international trade increased substantially. Of course many countries adopted these principles well before India and also benefitted from it in a big way.

This process of globalization encouraged the manufacturing giants world over to adopt an altogether different format and the system to procure their raw materials or inputs for their production lines. Globalization gave them the axis to almost all the countries and they could choose the right supplier no matter in which country he was located. Thus for these companies, the supply chain really became global and this naturally resulted in higher quality and competitive prices. All were happy, the global vendors, the

manufacturing company and also the customers.

All was well till the Russia – Ukraine crisis erupted. The war which was supposed to end in few weeks is still going on and the end is not in sight. The war blocked many sea routes around the world and thus the supply chain of many manufacturing companies got damaged. They were procuring raw materials / inputs from different countries and those could not be shipped due to the ongoing war. Thus the production was held up and the process lines stopped. Along with many other industries, this was true for the iron & steel industry as well. The sourcing for iron ore, coal, refractories, ferro alloys, lime etc. was so scattered all over the world, many companies had to suffer. The manufacturing giants realized that the global supply chain did provide a distinct advantage during good days but in a war like situation, it is a big disadvantage. It can completely jeopardize the production lines and put a big question mark on the company's viability. Further, in the turbulent times like this, providing access to overseas companies into one's domestic markets may be damaging to the indigenous producers of the same product.

This has supposed to have initiated the process of 'De-Globalization' and is today is being considered seriously by many countries as an effective strategy. On one hand many companies have shifted from their policy of having global supply chain to having a regional (if not local) supply chain. By doing this, they would substantially counter the risk factor in having a seamless production. Also, many countries have started debating the idea of increasing the trade barriers, directly or indirectly, in order to protect the domestic industry. Today, many countries in the world are facing the recessionary trends in their economy and have no other option but to support their local industry in this challenging period.

Is the world really going on the path of 'De-Globalization'? Has the era of Globalization come to an end? What will happen to WTO? Only the 'TIME' has these answers!

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<https://steelworldblog.wordpress.com/>

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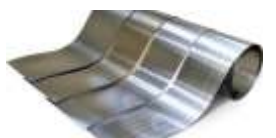


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# 20<sup>th</sup> IRON & STEEL SUMMIT

20<sup>th</sup> Iron & Steel Summit was organized by 'Steelworld' on September 12<sup>th</sup> 2023 on a digital platform. With over a quarter-century of catering to the industry's information needs, the flagship event has been a driving force in promoting healthy information exchange, addressing industry challenges, and showcasing the latest technologies and processes.

**D.A. Chandekar** (Editor & CEO, Steelworld) extended a warm welcome to the esteemed panelists and experts. First was **Satyajit Mohapatra**, the Head of



Technical, Marketing, and Application Engineering at

AMNS/India.

Next was **Vivek Agarwal**,



the Chief Operating Officer at Hira Group. Mr. Agarwal's extensive experience, including years spent at JSPL, has given him a deep understanding of the steel industry, covering everything from iron ore to sponge iron and steel production.

Next was **Dr. Anil Dhawan**,



## Iron & Steel Industry- The challenges ahead

who brought a wealth of experience from his role as Director General of Alloy Steel Producers Association. With many years dedicated to the alloy steel sector, Dr. Dhawan is undoubtedly a seasoned expert in the industry.

**D.A. Chandekar** (Host)- Let us start with opening remarks on the title, Iron & Steel Industry-The challenges ahead

**Satyajit Mohapatra**- In the steel industry, key challenges include sustainability, technology, raw materials, logistics, and workplace culture, especially in the flat products sector. Bridging the gap between cutting-edge technology and top-quality products is crucial to meet the rising demand, especially in construction. Sustainability, particularly "green steel," lacks defined standards, while a shortage of high-quality scrap complicates emissions reduction in electric steelmaking. To achieve India's carbon-neutral goal by 2070, we need carbon capture, emissions reduction in coke and blast furnaces, and hydrogen-based processes. Government policies should promote scrap recycling to address the current shortage. Reducing emissions is vital; India emits more CO2 per ton



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## Face to Face

of steel than the global average. Initiatives like the Coking Coal Mission and advanced technologies are crucial. Exploring efficient logistics, like waterways and slurry pipelines, is important. Fostering an innovative and excellence-driven workplace

for India's steel industry, including expanding markets, producing high-quality steel, and embracing green technologies. As we delve deeper into these issues, we will uncover further strategies for success in the steel sector



culture is essential for industry leadership.

**Dr. Anil Dhawan** - India is a global steel leader, driven by growing demand in sectors like infrastructure and defense. Challenges, including power costs and scrap availability, affect the industry worldwide. India aims to defend its market from cheap steel exports and address carbon concerns with government policies. The alloy steel sector faces cheap availability and raw material import issues. Embracing renewable energy can enable green steel production. The PLI scheme supports special steel production. In summary, India's steel industry has vast opportunities in expanding markets, quality production, and green tech adoption amid challenges. While challenges exist, there are numerous opportunities

**Vivek Agarwal** - Prime Minister Modi's goal of achieving net-zero emissions by 2070 provides optimism for the steel industry. Strong steel prices and demand signal a promising future. Pursuing green steel, despite challenges, is essential with abundant resources. Educating on energy efficiency and environmental safety is crucial. Optimizing raw material usage, reducing coal dependency, and fostering innovation are key. Technology advancements are necessary for progress. The private sector plays a significant role, and despite challenges, the steel industry is poised for a prosperous future.

**D.A. Chandekar** - *As India advances in economic development and infrastructure, the carbon footprint becomes crucial. Global attention to environmental standards*

**may impact steel exports. It's essential to discuss our preparedness for these concerns in the future. How well-prepared are we to address these concerns in the future ?**

**Satyajit Mohapatra** - AMNS utilizes DRI (Direct Reduced Iron) and EF (Electric Furnace) routes to reduce carbon emissions but also employs blast furnaces due to India's iron ore availability. Coking coal quality and availability pose challenges, and domestic production could offer a competitive edge. Enhancing blast furnace efficiency and exploring electric furnaces for eco-friendly production are key. High-quality scrap sourcing remains vital, especially with growing demand from the green steel-focused automotive sector. The industry is committed to meeting these challenges, though implementation may take time.

**Vivek Agarwal** - We're committed to going green with a focus on reducing carbon



emissions. We've audited emissions and are transitioning to greener energy sources with a 100-megawatt solar plant. Our journey involves green power generation and, in the



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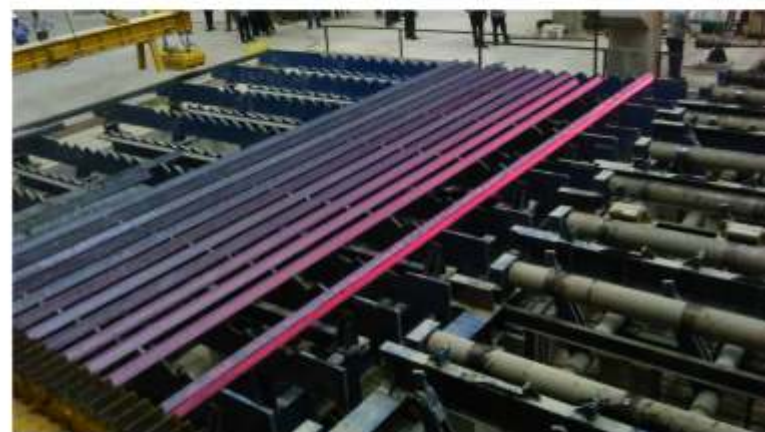
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## Face to Face

future, scrap-based steel production. However, uncertainties in scrap availability mean we'll continue using blast furnaces. Ensuring a constant supply of green energy remains challenging, especially for critical steelmaking operations. Large-scale green steel production, while our goal, is complex.

**Dr. Anil Dhawan** - Major steel plants like Tata Steel are embracing greener practices despite blast furnace technology. Awareness is growing among leading steel exporters like AMNS, Tata, JSW, and JSPL as they prepare for green steel challenges. Green steel will adhere to strict environmental standards, aiming for emissions under 1.8 carbon emissions per million tons. Older plants should focus on energy conservation, audits, and emissions reduction. Government committees are discussing policies to support green goals. India's steel industry, the world's second-largest, targets a 30% emissions reduction by 2030 and carbon neutrality by 2047. Green steel's production and premium will depend on demand. It's adaptable to India's unique circumstances, and steel producers need not overly worry.

### **D.A. Chandekar-**

***But then, how we are going to export in Europe because they are going to impose that carbon adjustment taxes?***

Mr. Satyajit Mohapatra - In

terms of our prominence, we are focused mainly on the domestic market, which is equally important to us. However, we are also looking into expanding into the export market. When discussing this with experts, they emphasize that we are internally preparing and our



team is gearing up to meet these requirements. We understand that the challenges we are facing cannot be resolved overnight; it needs to be done in stages. So, when we mention that it will take some time, it doesn't mean we haven't started. We are well aware that government regulations will come into play, and there will be specific timelines. Our preparations have already begun, and we are progressing gradually. The actual outcome will depend



on when the government formalizes activities, such as green initiatives. Just as you mentioned, defining what 'pristine' means and establishing parameters like

reducing a certain amount of carbon dioxide or steel production each year will be based on government directions. The steel industry will align with these directives, and while we can't pinpoint the exact steps needed at this moment, we are indeed in the process of preparing to meet these requirements.

Share your thoughts on green steel.

**Vivek Agarwal** - Before we fully commit to green steel production, there's a significant opportunity right in front of us: reducing energy consumption. This can be achieved promptly, either through raising awareness, enhancing the quality of raw materials, improving operational efficiency, fostering innovation, or benchmarking specific energy consumption at a national level. We can start by setting national standards for key parameters in industries like Direct Reduced Iron (DRI), induction furnaces, electric furnaces, and blast furnaces. Some plants in India are already meeting these standards, so there's no reason why others cannot do the same. It's puzzling that some are using 1.4 units of energy per ton of steel when others are achieving better results. Achieving even a 10-15% reduction in energy consumption, from the current 2.65 units to 2.12 units per ton, is a significant step in the right direction. This can be done immediately and relatively easily without requiring substantial investments, and it's a meaningful move toward sustainability even before transitioning to green steel production. ■



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## Face to Face

**Dr. Anil Dhawan-** The term green steel is a concept, but the primary objective is decarbonization, as acknowledged in ministerial, government, and industry circles. The mission is named Mission Decarbonization of Steel, and all associations,

It's a flexible, multi-year scheme with incentives that increase along the value chain. While there have been initial challenges, the government and industry are working together to address them, with active engagement from the Steel Ministry to make the scheme



regardless of their size or technology, are collaborating to meet decarbonization norms without disrupting production. If we talk about the PLI scheme, it covers all steel categories, including BLI and EAF steel. Exact funding distribution figures are not available yet. The Government of India has allocated approximately 6,000 to 6,500 crore rupees for the BLI scheme. Many industries have applied for PLI one, and more are expected to join in PLI two, indicating the scheme's success. Companies will receive funding as they demonstrate production. The PLI scheme has specific parameters outlined in publicly available documents from the Ministry of Steel.

more effective.

**D.A. Chandekar-**

***Now, let's shift our focus to the next topic, which is digitalization. What are your insights or opinions on this matter?***

**Vivek Agarwal** - In the realm of digitalization, there have been advancements and initiatives in the industry. However, I'd like to highlight a couple of actions we've taken at our plant, and we're in the early stages of seeing how they work out. When it comes to production plants, especially in the steel industry, there are two critical factors: operating parameters and experience. While we can automate and optimize based on parameters and historical

data, experience plays a crucial role that can't be entirely replaced. Sometimes unexpected events, like sudden rain causing equipment failure or issues at transfer points, can't be predicted by AI systems. In such cases, human experience is invaluable. For most plants, including ours, online monitoring, data collection, and connectivity have become standard practices. We've already implemented these measures, and we're planning to incorporate more advanced digitalization techniques in our plant this year. During a recent steel conference in Kolkata, Tata Steel was asked about their digitalization efforts. I pointed out that for companies other than Tata, there are costs and risks involved in digitalization. Tata Steel has significant resources and Tata Lexy at their disposal, which can reduce costs and risks. I encouraged them to continue their efforts, even if they faced initial challenges. We, too, have faced challenges but haven't given up. Online monitoring and data integration, often using SAP, are common practices in our industry. Digitalization is an ongoing process that requires raising awareness, gaining acceptance, and ensuring the availability of the necessary software. While there is a change in leadership towards digitalization, it will still take time to fully embrace these technologies at a widespread level.

**D A. Cahndekar-**

Satyajit, it seems that bigger plants like AMNS and JSW are making more rapid strides in adopting digitalization. This



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## Face to Face

shift represents a different culture, mindset, and approach. I'd like to understand your perspective on this and also hear about the progress in your company. I'm not limiting the question to AMNS but rather addressing companies similar to yours in terms of digitalization focus

### **Satyajit Mohapatra -**

We've already taken significant steps towards digitalization, and there are numerous ongoing projects and activities in this direction. It's widely recognized in the steel industry that without embracing digitalization, sustainability is a challenge. This realization extends beyond just our company; it's an industry-wide understanding, particularly in the context of Industry 4.0. Digitalization is rapidly becoming a reality, not just for our company but across the steel industry. The pace of digital transformation is impressive, and we're actively engaged in various aspects of it. For instance, we've been working on automation systems like supply chain modules for the past one and a half years, and we're making substantial progress. Additionally, we have projects related to online vehicle tracking for efficient transportation and delivery to our customers. We're continuously improving our systems, including claims management, customer inquiries, and order processing, all of which are streamlined through sales

force automation. As we move forward, manual intervention will diminish significantly, and automation will become the norm. Our goal is to make processes as streamlined and automated as possible. This commitment to digitalization is deeply ingrained in our culture, and we're proud to be at the forefront of these advancements.

**Anil Dhawan -** As everyone knows, smaller operations have limited capacity, but the demand from buyers, particularly in the defence and aerospace sectors, is significantly higher, necessitating digitalization. The need for digitalization is widely recognized, not only to align with international standards but also due to intense competition. In

falling behind. Delaying digitalization is not an option, as the global industry is rapidly advancing in this area. Failing to adapt will only lead to increased challenges and potential competitors taking the lead. Therefore, ignoring digitalization is not a choice; it's a costly mistake. Regarding the argument about AI's applicability in crisis management or abnormal situations, the consensus differs. While some argue it might not be effective in such scenarios, others, including the speaker, believe that Industry 4.0 and AI can significantly aid in crisis management and abnormal situations. Implementing proper systems can reduce the chances of adverse events, and there are modules within Industry 4.0 designed for safety and crisis



today's highly competitive landscape, companies must strive to meet high standards akin to Toyota or Maruti Suzuki; otherwise, they risk

management.

**D A. Chandekar -**  
*How would you describe the current market's stability and growth prospects?*



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## Face to Face

**Vivek Agarwal**- India's market is flourishing, driven by ongoing infrastructure growth, and this trend is expected to continue for years. Demand is rising, especially after the monsoon season. Meeting steel demands for projects may become a challenge. Anticipated DRI price increases align with India's development goals to transform into a developed nation. The government's ambitious plans span the entire country.

**Satyajit Mohapatra** – India is shifting to innovative steel products driven by demand in automotive, construction, and infrastructure. New regulations support manufacturing changes, including value-added applications like solar steel. The goal is to produce all flat steel products domestically, especially in rural areas, reducing imports and bridging urban-rural consumption gaps. Initiatives like hypermarkets aid in reaching interior regions to meet growing steel demand across sectors.

**Dr. Anil Dhawan** - The Indian steel industry is dynamic, encompassing various segments like construction, automotive, and more, linked to the country's GDP. Short-term stability is expected until 2024 due to factors like strong GST collections, government spending, and white goods demand. Transitioning from a net exporter to importer may become an opportunity if demand and prices remain

favorable, but major steel companies will maintain international presence. Balancing domestic and international markets is crucial, with units expanding capacities for exports, especially in carbon steel. The industry remains versatile, serving domestic and global markets actively.

**D.A. Chandekar**  
*I would like to have the closing remarks of each one of you*

**Satyajit Mohapatra** - I believe our discussion today has covered various aspects of the steel industry and its challenges. We've addressed these challenges and emphasized the need for a collaborative approach involving customers, suppliers, and government support. With demand steadily increasing, we remain optimistic about the industry's future. We aim to meet the goals set in the National Steel Policy, including the production of 300 million tons by 2030.

**Vivek Agarwal** - In summary, we should acknowledge and commend our private sector, which contributes 85% of the nation's steel production. They not only generated demand but also managed to reduce their debt significantly during the COVID-19 pandemic. Currently, they are in a more secure competitive position. Their expansion efforts in the eastern part of the country deserve appreciation, and it's crucial for the government to continue supporting them, as it's in the nation's interest. Demand and prices remain favorable, and we will continue to be active in

exports. While occasional government measures, like recent import restrictions, occur, we remain optimistic about the bright future ahead.

**Dr. Anil Dhawan**- In my closing remarks during the session, I'd like to focus on the secondary sector, which I represent. This sector, now referred to as the electric sector due to its innovative methods, has played a significant role in the past and will continue to do so in the future. The government's emphasis on reducing carbon emissions aligns with our efforts in this sector. By adopting electric steelmaking methods, we can contribute to lowering the country's overall carbon emissions. We've discussed the demand for alloy steel, defence, aerospace, and the auto sector. I anticipate even more investments in these areas as demands become increasingly customized. Indian steel will continue to play a prominent role on the global stage. Lastly, addressing the concern raised



earlier about the quality of our steel, I want to assure everyone that while we may not be the best in every category, many Indian steel companies produce highly preferred steel products. Our commitment to a culture of quality, continuous technological advancements, and adaptability ensures that we remain competitive on the global stage. Thank you. ■



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# Upgradation in Steel Rolling Technology of Long Products

Introduction: In this article, the technology upgradation management in small and medium enterprises (SME sector) are discussed. With stiff competition from integrated steel plants, their modernization and expansion, the availability of finished steel has increased and the competition is becoming tougher day by day for steel re-rolling industry. The technological upgradation offers higher productivity, higher yields and lowers the consumption of utilities among many other benefits.

A brief overview of Indian steel plants (Integrated and mini steel plants) is presented. Direct rolling technology (DRT) involves

rolling hot billet as it emerges from the continuous casting machine. All these aspects are discussed in this article. (A) Technological upgradation: Re-rolling mills in small and medium enterprise (SME) sector play an important role in meeting the demand of the finished steel in the country. These mills are crucial to the national steel economy since they are making available a large amount of finished steel in the market. The technology adoption level of these mills is rather low and many of these mills operate with technologies which are 50 years to 60 years old. These mills operate at low level of productivities and high level of energy consumptions.



**Dhiraj K. Chauhan**  
(Director, METCON)  
Metallurgical  
Consultants.

The finished steel available from integrated steel plants is made in automated, high speed, high productive, continuous rolling mills which are equipped with the modern technologies. Further, the products from these mills pass through close quality control procedures and are certified by the certifying agencies.

Re-rolling mills' challenge for tomorrow is going to have added competition due to the increased product availability from the integrated steel plants. The resistance towards technological upgradation is due to the facts that Limited technical knowledge is available with the owner. This is mainly because in most of the cases, the owner has no formal education in the technical field. Further he has





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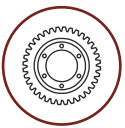
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**Figure 1: Bar & Wire rod Mill SMS Group GMBH**

The involvement of the workforce is an essential element of the technological upgradation. The selection of technology in each step of upgradation is to be done based on several criteria as shown in the figure 1.



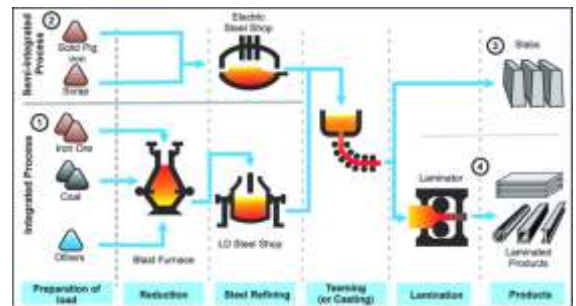
**Figure 2: Selection criteria for technological upgradation**

very little time available with him for enhancing his technical knowledge base because of his involvement in running the mill.

The upgradation of technologies in re-rolling mills need (i) a belief that it is needed, (ii) support and commitment of owner, (iii) allocation of resources, (iv) help from professionals, (v) overlooking of the observations of the opinion leaders in the industry, and (vi) enhancement of

knowledge of the mill owner and the workforce through training and workshops. Technological upgradation offers an obvious advantage over whatever it replaces. Theses can be (i) higher productivities, (ii) higher yields, (iii) lower specific consumption of utilities, (iv) improvement in working environment, (v) better job satisfaction, (vi) improved life of consumable parts, (vii) improvement in the product quality, (viii) improvement in

the customer satisfaction level, (ix) saving in resources, (x) reduction in waste generation, (xi) improvement in equipment and workers' safety, and (xii) lower emission levels etc. The mill owner must feel highly satisfied after implementation of technological upgradations since he is going to enjoy not only the benefits but also because he has secured the future of his mill.



**Figure 3: Steel Production of Functional Products**

(B) Status of Indian steel plants: India harbors 15 integrated steel plants (ISP) and 2,637 mini steel plants & processing units (earlier known as secondary steel units), contributing 2% of country's GDP and employs 2.5 million people in steel and its allied industries. ISPs produce 1 to 10 million tonnes of steel annually, the mini-steel plants produce 15,000 to 200,000 tonnes per year. While our integrated steel plants have the wherewithal to employ upgradation of technologies, state-of-art facilities, the mini steel plants are struggling with obsolete technology practices. But they contribute to 50% of the total production.

The secondary steel sector now termed mini-steel plants are diverse in terms of product range, technology, scales of operations. The industry types include about



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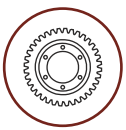
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## Industry Update

315 nos. of sponge iron or direct reduced iron (DRIs), 39 nos. of electric arc furnaces (EAFs), 1,126 nos. of electric induction furnaces (EIFs), and 1,157 nos. of steel re-rolling mills (SRRMs). In addition, there are 400 nos. of Composite mills which have both EIFs and SRRMs in the same premises.

Understanding the huge potential of triple gains firstly energy savings, secondly GHG abatement; and thirdly but most importantly monetary savings to the mini-steel plants, the Ministry of Steel, GoI and United Nations Development Programme (UNDP) and India entered into an agreement to carry out technological interventions to achieve the same.

The extensive research, a number of brainstorming and consultations, resulted in identifying/ innovating 75 technology options for all four sub-sectors of secondary steel. 35 technology options were successfully implemented in SRRM and EIF sector respectively, slashing the energy consumption significantly. The technology options pertaining to DRI & EAF sector were identified at the closure of the project were supplemental, to enlighten the units to take forward implementation.

In the old practice, billets/ingots are transferred to storage yard and stored. This process consumes about 700 to 800 kWh of electricity to process a tonne of steel.

Subsequently, these blooms/billets/ingots are re-heated in a re-heating furnace to red-hot level at about 1,150 deg C (steel re-crystallization temperature) from ambient temperature and then rolled to desired shapes and dimensions in the rolling mills. The re-heating process consumes thermal energy of about 80 to 100 kg of coal and the

cooling system; (iv) practice of hydraulic/plasma shearing machine instead of gas cutting (v) Roll pass design software; (vi) operational enhancements (canopy cover to reduce radiation loss); (vii) 5S practices helped in accomplishing the rolling of first billet from CCM directly to the rolling mill.

In the Direct Rolling Technology (DRT) billets are



rolling consumes electrical energy about 100 to 120 kWh per tonne of steel.

The Steel Project Team recommended (i) induction furnace optimization (ii) effective conveyor roller designs with VFDs (variable frequency drives); (iii) installation PLC (programme logic control) based automation system for the operation of secondary

diverted in hot condition directly to the rolling section. Thus, the billets are not re-heated in the re-heating furnace at all. The key factor influencing the success of direct rolling is the optimal maintenance of billet temperature at different stages.

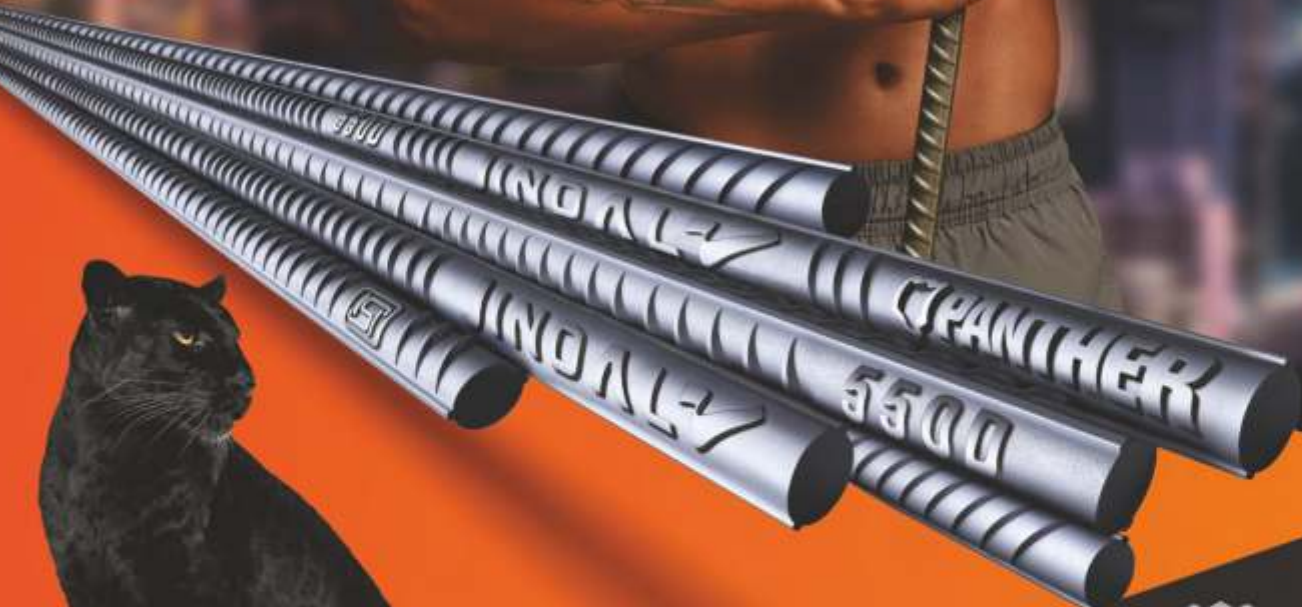
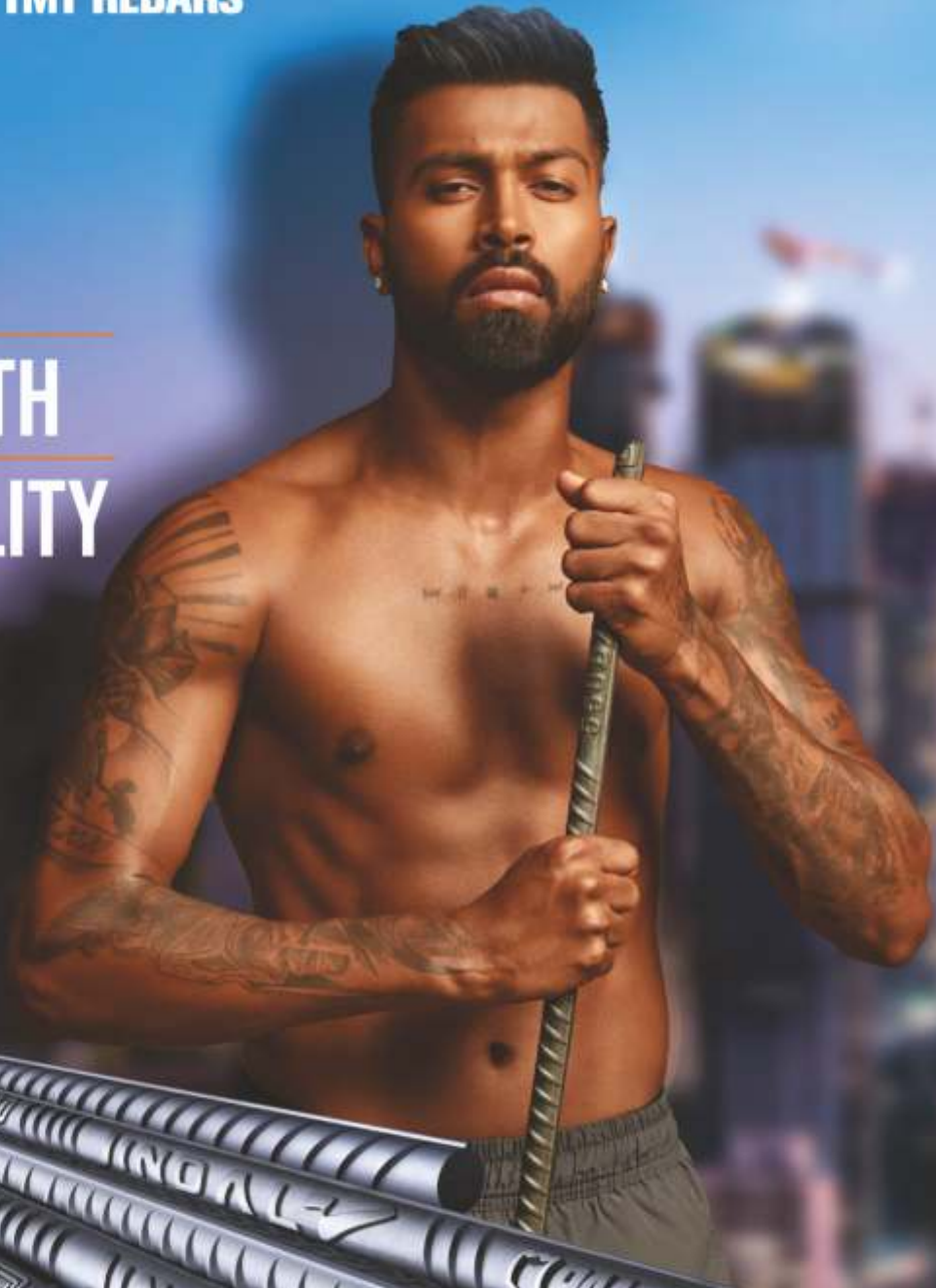
At Shri Bajrang Ispat & Power Ltd., Raipur, Chhattisgarh, where DRT was





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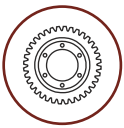
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## Industry Update

implemented, brought them whopping and unbelievable results. All furnace oil usage stopped for re-heating the billets. Specific parameters of steel production in Bajrang Steel pre-project and post implementation of DRT (main) and other technology package is as follows;

1) Eliminated use of Re-heating furnace

5) Eliminated burning losses completely from earlier 1.39% to zero  
6) Reduced GHG emissions by 63.3% from earlier 220 to 80 kgCO<sub>2</sub> per tonne of steel.

The unit invested about Rs 150 lakh on DRT and other technology packages. The unit processed about 31,500 tonnes of steel.



completely (of capacity 18 tonnes per hour. The capital cost is about Rs 100 lakhs with AMC (annual maintenance cost) of Rs 8 - 10 lakhs and 3-5 operators operate it.

2) Increased productivity by 26% from 10.5 to 13.20 tonnes per hour

3) Avoided furnace oil usage from 45.34 liters per tonne to zero.

Slight increase in Specific power consumption by 10% from 98.83 to 108 kWh per tonne of steel due to the addition of the roller conveyor system & power consumed during CCM operation

4) Increase in mill yield by 2.5% from 96.06 to 98.49%

The benefits of net energy savings alone accounted to Rs 564 lakhs. Eliminating burning losses resulted in 440 tonnes of steel saved, thereby saving about Rs 96 lakhs. Thus, in total monetary benefits per year was Rs 660 lakhs.

The Steel Project Team worked closely with composite mills and persuaded 28 composite units and in-fact provided incentives to implement DRT. Further replication by another 168 units was by those who attended our awareness/ training programmes and hear about word of mouth. Thus, these 196 (28 direct project intervention + 168 in-direct project intervention) units invested about Rs 650 Crore converting their unit to DRT

unit. This change provided the following triple benefits: (i) Saving of 5.9 lakh tonnes of coal / 360,000 tonnes of oil equivalent per year in 196 composite mills; (ii) Saved Rs 470 Crore annually for the mill owners; (iii) Saved 1.44 million t CO<sub>2</sub> annually.

Thus, the annual benefits for 740 steel units together are:

> Saved energy of about 500,000 tonnes of oil equivalent.

> Saved Rs 1,004 crore due to energy saved and reduction in burning losses (Rs 748 Cr saved due to energy and Rs 256 Cr due to burning losses).

> Reduced 2.1 million tCO<sub>2</sub> annually.

### Future potential

Despite these great benefits, there are still about 1,897 mini steel plants (of total 2,637 mini steel plants) that need to adopt energy efficient and energy conservation technologies and techniques. They together need to invest about Rs 2,200 to 2,500 Crore as capital investment. Once these interventions are made, the cumulative benefits to these units are likely to be (i) saving of energy of 2.8 million tonne of oil equivalent per year, (ii) monetary benefit of Rs 2,800 to 3,000 Crore year on year and (iii) reduction of 10 million tCO<sub>2</sub> annually.

References. 1) Disruptive technology - direct rolling in mini-steel plants rolls steel greener and saves Rs 1,000 crore annually by SN Srinivas & K Shanmuganathan. Published June 06,2020. *The Authors were part of UNDP Steel Project.*

2) Technology Upgradation Management in Re-rolling Mills. Satyendra. Ispatguru June 9, 2017. ■



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## **Avaada Group to Establish Green Hydrogen Project at Tata Steel SEZ's Gopalpur**

### **Tata Steel SEZ and Avaada Group sign an MOU for the project**

Bhubaneswar, September 7, 2023: Tata Steel Special Economic Zone Limited (TSSEZL) and Avaada GreenH2 Private Limited, Green Hydrogen arm of integrated energy enterprise of Avaada Group, today signed a Memorandum of Understanding (MoU) to establish a green hydrogen and green ammonia project at Gopalpur Industrial Park in Ganjam district of Odisha. Under the definitive agreement, Avaada Group will acquire 120 acres of

land in TSSEZL's Gopalpur Industrial Park (GIP), to set up a 0.5 MTPA green hydrogen/ammonia production facility.

The MoU was signed between Manikanta Naik, Managing Director, TSSEZL, and Prashant Choubey, President, Avaada Group, in the presence of Hemant Sharma, IAS, Principal Secretary, Industries Department and Chairman, Odisha Industrial Infrastructure Development Corporation (IDCO) and

Industrial Promotion and Investment Corporation of Odisha Limited (IPICOL), Government of Odisha, and Bhupendra Singh Poonia, IAS, Managing Director, IDCO & IPICOL.

Hemant Sharma, IAS, Principal Secretary, Industries Department and Chairman, IDCO & IPICOL stated, "Odisha's roadmap for the green fuels sector is both comprehensive and ambitious. The addition of Avaada Group to our partnership ecosystem is an endorsement of our





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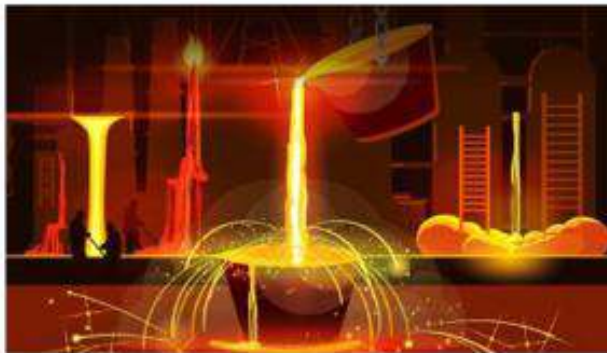


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- MOIL has set up a plant based on indigenous technology to manufacture 1,500 MT per annum capacity of Electrolytic Manganese Dioxide (EMD). This product is used the Pharma and Chemical Industries dry battery cells.
- A Ferro Manganese plant having a capacity of 12,000 MT per annum is also set up for value addition.
- Strong mining experience can be leveraged to diversify into mining of other related minerals.
- Pursuing expansion plans to double its production in the next 4-5 years.
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strategy. We welcome Avaada to the Odisha family and look forward to achieving new milestones together."

This green ammonia will be produced from green hydrogen, and the production facilities will be powered by renewable energy.

Bhupendra Singh Poonia, IAS, Managing Director, IDCO & IPICOL, added, "At IPICOL, we are committed to facilitating transformative ventures that propel us towards a sustainable future. This MoU between Tata Steel SEZ and Avaada Group underscores our unwavering dedication to usher in investments that align with our sustainable development goals. As we look ahead, collaborations

like these will light our path to a more prosperous and sustainable future"

The green hydrogen and ammonia produced at this facility will be exported to markets around the world from the existing Gopalpur Port facility. The Utility Corridor between Gopalpur Industrial Park and Gopalpur Port will provide a dedicated corridor for smooth logistics and pipeline connectivity.

Manikanta Naik, Managing Director, Tata Steel Special Economic Zone Limited, said, "We are happy to sign the MoU with Avaada Group for their Green Hydrogen Project. This is the second investment we have attracted in the green hydrogen/ammonia manufacturing sector. Our industrial park continues to

be a preferred destination for investors, given its conducive offerings for setting up a unit. We take this opportunity to once again thank the Government of Odisha for its progressive policies that are attracting investments to the state of Odisha."

"We are eagerly looking forward to having more investors at the Industrial Park, which will add to the industrial development of the area", he added.

Vineet Mittal, Founder and Chairman, Avaada Group, said, "We are delighted to announce the signing of a MoU today with Tata Steel SEZ, marking a significant milestone in our journey towards realising our green ammonia project within the Gopalpur Industrial Park. Green hydrogen and ammonia production is a crucial





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## Analysis

cornerstone in the global shift towards sustainable energy. Avaada is dedicated to contributing to India's aspiration to become a leading global green hydrogen manufacturing hub. "

"Our gratitude extends to the Odisha government for their unwavering support, as it empowers us to take bold strides towards a greener and more sustainable future. We pledge to facilitate the transition towards a low-

flagship industrial park, Gopalpur Industrial Park (GIP), in Odisha's Ganjam district. The company plans to develop the GIP as an emerging manufacturing hub for both domestic and export-oriented industries. The company provides common infrastructure facilities, plug-and-play utility infrastructure, and associated services to facilitate the smooth grounding of the incoming units.

Nitrate Complex, and GAIL Gas Limited is establishing an L-CNG Conversion Unit in the park.

For more information, please visit [www.tatasteelsez.com](http://www.tatasteelsez.com).

About Avaada Group: Avaada Group, led by social entrepreneur Vineet Mittal, is an integrated energy platform with varied business interests. It ranges from manufacturing solar ingot, wafers, cells, modules, and electrolyzers to renewable power generation,

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# TATA STEEL



## We Also Make Tomorrow

carbon economy, leaving behind a lasting legacy of value for our stakeholders and society", he added.

TSSEZL had signed one MoU with ACME Clean Energy Pvt Ltd on August 25, 2023, for the establishment of a Rs 27,000 crore green hydrogen and ammonia project later at the Gopalpur Industrial Park. ACME will acquire 343 acres of land in TSSEZL's Gopalpur Industrial Park and a 1.3 MTPA green ammonia production facility there.

About Tata Steel Special Economic Zone Limited: Tata Steel Special Economic Zone Limited, a 100% subsidiary of Tata Steel Limited, is developing its

As of date, Gopalpur Industrial Park has attracted investments worth 4,000 crores and generated employment opportunities for more than 1,700 people. There are five different industrial units already operating in Gopalpur Industrial Park, including Tata Steel Mining Limited, Tata Consumer Products Limited, Anadrone Systems Private Limited, East Coast Overseas Private Limited, and Odimet Resources Private Limited.

In addition to the operational units, Deepak Fertilisers & Petrochemicals Corporation Limited is setting up a Technical Ammonium

hydrogen, green methanol, and green ammonia production. Avaada Energy, the group's flagship company, is India's fastest-growing renewable energy IPP. The group plans to reach 11 GW of operational projects by 2026 and 30 GW by 2030. The Avaada Group's solar manufacturing business is close to establishing a wafer, cell, and module manufacturing facility. Additionally, the group is executing large project of Green Hydrogen and its derivatives like Green Ammonia across various regions and planning a substantial capacity addition to cater to the increasing domestic and international demand for clean fuel.



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# Beneficiation of Low-Grade Iron Ore & Its challenges

The objective of this presentation is; conservation of iron ore resources.

Conservation of all kind of Natural Resources is an important responsibility of mankind.

Beneficiation of Low-Grade Iron Ore containing low Fe % and generated wastes during mining operation as well as reject tailing generated from beneficiation plants is a part of this objective.

Beneficiation of such ore has many challenges such as;

- 1) Suitable beneficiation process, technologies and equipment.
- 2) Handling of large

utilisation of and tailing.

- 4) More water & Power consumption.
- 5) Higher investment.
- 6) Higher processing cost.

Developing efficient and cost-effective beneficiation technologies for low-grade iron ore is an ongoing challenge.

With all these challenges, the necessity of this requirement cannot be ignored. All have to be met out or addressed.

Let us start with what can be done within the present frame work.

(We must remember that liberation and other characterises of ore are the primary requirement for beneficiation of ore.)



**Narendra Singh Rathor**  
Consultant

coarser particle size range there by reducing the onward processing capacities of the beneficiation equipment. (Technologies & equipment are available)

- 2) Improving the grinding process & minimizing the generation of microfine particles < 30 microns. Many beneficiation plants are victim of this problem.
- 3) Use of new technologies for de-liming process for discarding clay containing impurities, thereby reducing the viscosity of feed to separation equipment to perform better.
- 4) Recovery of microfine fine particles using suitable separation equipment. Presently used equipment do not support this requirement. (Suitable technology & equipment are available)
- 5) Whichever ore that cannot be beneficiated due to their complex nature, most of those also can be beneficiated by roasting and magnetic separation process. ■



quantity of feed ore with wide fluctuation in quality.

- 3) Disposal &

- 1) Wherever feasible/possible, remove the non-Fe bearing particles in

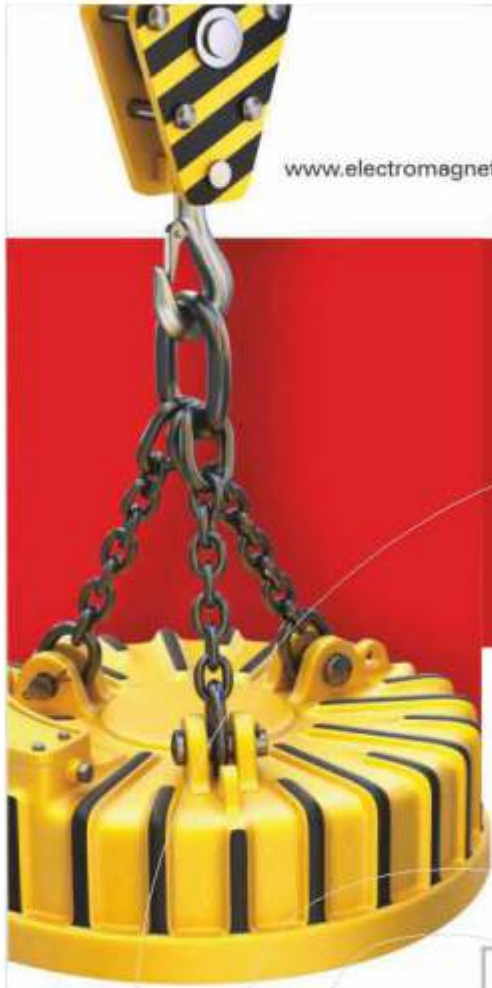


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## SMS group India spearheads transformation of steel industry with Electrics & Automation-

**Shaping a new generation of engineers to enhance capacity and global presence-**

**Visionary SMI 400 project underlines the idea of 'One team, one vision, one goal'**

SMS group India (SMI) has proudly announced the launch of its groundbreaking project, SMI 400. The aim of this project is to double the capacity of the Electrics & Automation business area, scaling up from approximately 200 employees to an impressive 400 and thus creating an impressive pool of engineers for SMS group's global operations. These engineers will be recruited in Gurgaon, Kolkata, and Pune, as well as in Ho Chi Minh City in Vietnam. Other satellite offices in Hyderabad and Bhubaneswar are also in the offing. Space in Gujarat will come with our future manufacturing workshop.

As a 'Leading Partner in the World of Metals', SMS group supports steel makers around the world in achieving the required quality, sustainability and safety by utilizing its core competencies in mechanical equipment, electrical systems, automation, and digitalization. Under the X-PACT® (PROCESS AUTOMATION CONTROL TECHNOLOGY) brand name, SMS group offers the full range of systems expertise covering the entire metallurgical process chain. SMS group's Electrics & Automation unit has more than 1000 employees at locations in Germany (Düsseldorf, Hilchenbach, and Mönchengladbach), Italy (Milan and Tarcento), Romania (Bucharest), China (Beijing, Tianjin, and Wuhan), the United States (Pittsburgh), and India (Delhi, Kolkata, and Pune). The team is both global and regional at the same time, as they work on projects in their respective region as well as on global projects.

At the heart of the SMI 400 project lies the mission to cultivate a sustainable talent pool of skilled engineers in this pivotal area. SMS group recognizes the importance of nurturing and empowering the next generation of engineers to meet the evolving demands of the industry.

The journey commenced in 2022 with the addition of 35 skilled professionals, elevating the full-time employee count to 205. This year's objective is even more ambitious, with a keen focus on recruiting and developing a fresh wave of engineers. By investing in substantial training, SMS group is seeking to shape these young talents for their global organization – both in terms of their technological competence as well as our SMS culture and values.

Sumendra Jain, CFO & Interim CEO of Region APAC & MEA, SMS group India, said, "SMI 400 embodies our unwavering commitment to elevating engineering excellence. We are excited about the potential of nurturing the next generation of engineers, strengthening our

capabilities, and fostering stronger connections with our customers worldwide."

With a drive to offer quality services to customers and expand its presence in the region, SMS group will be establishing a new manufacturing plant in Gujarat under the 'Make in India' and 'Make in Gujarat' initiatives. SMI 400 is an integral part of this vision of expanding our capacities in India, specifically in the area of Electrics & Automation. These initiatives demonstrate SMS group's focus in enhancing local manufacturing and promoting competence building in line with the country's economic goals.

SMS group uses its expertise in digital transformation, sustainable plant technologies, and the circular economy in realizing its mission of #turning metals green. Built on the corporate values of Act, Share, Care, Innovate and Succeed, SMS group believes in enhancing the workforce, both in numbers and capabilities, through initiatives such as SMI 400, which will drive positive change in the industry.



*A training session in progress for new engineers/recruits for the SMI 400 program*



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## Building, construction, infrastructure sectors to boost the India's Steel consumption

Steel consumption within the building, construction and infrastructure sectors increased at a CAGR of 4.5 per cent over the past four years. The healthy growth trends are expected to continue for the foreseeable future.

The per capita steel consumption of India is only 78 kg (the rural per capita consumption is only 21 kg), as compared with a global average of 233 kg, according to a report by Deloitte India and The Indian Steel Association (ISA). It said that the steel to cement ratio in India is 0.35 whereas for other countries, it is more than one. Similarly, it added, the share of steel framed construction is only 10 per cent in India, whereas it is more than 40 per cent and has even reached 80 per cent in other countries. This entails that with rapid urbanization and a growing GDP, there is a tremendous potential for steel consumption growth.

"India has a significant opportunity to boost steel consumption in construction and infrastructure, driven by urbanization, real estate, and government investments. Collaboration between government and industry is crucial to promote versatile, sustainable, and cost-effective steel solutions, capitalizing on existing incentives and fostering a competitive steel hub in India," said Rakesh Surana, Partner, Consulting, Deloitte India.

Steel consumption within the building, construction and infrastructure sectors increased at a CAGR of 4.5 per cent over the past four years. The healthy growth trends are expected to continue for the foreseeable future, with demand growth of 5-6 per cent in the building and construction sectors and 8-10 per cent in the infrastructure industry until FY 2025, the report stated.

The finished steel demand from the building and construction sector is expected to reach 90 MT in FY31, with a CAGR of 9.7 per cent and to 63 MT in FY31, with a CAGR of 6.8 per cent from the infrastructure sector. "The key demand drivers for the building, construction and infrastructure sectors are urban housing, rural housing, commercial real estate, industrial real estate and government spending on infrastructure projects," it said. Other sectors that will drive demand for steel in India are automobiles, and engineering and packaging industries.

"The Indian steel industry is set for substantial growth, driven by building, construction, and infrastructure demand. Higher steel usage is expected to reduce construction time and life cycle costs across infrastructure projects. Leading steel players are expanding capacities and adopting efficient delivery

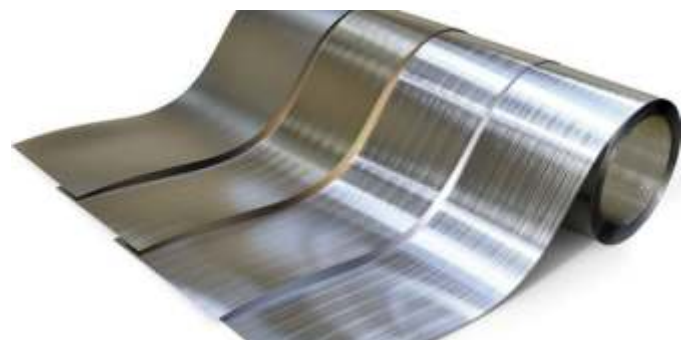
models to provide value-added products. Moreover, branding and marketing will enhance end user perception and adoption of steel within the building, construction, and infrastructure sectors," said Rajib Maitra, Partner, Consulting, Deloitte India.

### Need for government policy intervention

The government can drive the steel usage by implementing policies focused on promoting steel-based construction, bridges, and infrastructure projects. Deloitte-ISA report said that these incentives may include mandating life cycle cost comparisons for materials, incentivizing green steel manufacturing, and offering tax benefits based on carbon footprint. "Standardizing steel-specific structures, ensuring fire-resistant steel availability, and enhancing fabricator skills are crucial. Building expertise in structural steel design, branding steel as a construction material, and providing PLI incentives for its use in building and infrastructure are also key. Additionally, energy standards for green buildings and a dedicated project information portal can facilitate capacity planning for steel producers," it said.

### Increased steel usage: Potential from urban and rural areas

Steel demand in urban areas is rising across sectors like residential, commercial, retail, hospitality, and government infrastructure. However, the report said that boosting rural steel consumption faces challenges like awareness, affordability, skills, and ecosystem support. "Strategies include using steel with solar setups for rural facilities like homes, anganwadis, toilets, libraries, schools, and nursing colleges. Steel serves in food processing machinery, grain silos, cold storage, and infrastructure. Co-op societies can create cost-effective warehouses with large-span steel structures. Increasing steel pipe usage for irrigation is vital. Promoting metal roofing, steel doors, and windows expands rural steel adoption. Steel supports dairy and agriculture with shelters, machinery, tractors, and trailers," it said.





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## India's domestic steel demand growth revised upwards to 9-10% from 7-8% in FY2024 due to Government infra spending: ICRA

**India witnessing the strongest pace of steel demand growth in the era post the global financial crisis**  
**Steel companies expected to remain more resilient to withstand any worsening of the macroeconomic environment - ICRA**

ICRA has revised the FY2024 domestic steel demand growth forecast upwards to 9-10% now, from 7-8% made at the start of the current fiscal, on the back of strong government capital expenditure. As a result, domestic steel demand is poised to grow at a double-digit compounded annual growth rate (CAGR) of 10.5-11% between FY2022 and FY2024. The last time the industry witnessed such a sustained period of high growth was before the global financial crisis, when, strong private sector capex helped domestic steel demand grow at a CAGR of 12.7% between FY2006 and FY2008.

Powered by the Government's infrastructure-oriented



growth model, domestic steel demand has been growing in double digits since FY2022, and this momentum continued in the current fiscal as well, when demand registered a growth of 13.1% between April and August of FY2024. According to ICRA's latest research note on the steel sector (Link), the Central Government capex registered an impressive 59.1% year-on-year (YoY) growth in Q1 FY2024, which suggests an accelerated pace of infra spending ahead of the 2024 elections.

Commenting on the industry trends, Mr. Jayanta Roy, Senior Vice-President & Group Head, Corporate Sector Ratings, ICRA said: "Around 14.3 million tonne per annum (mtpa) of new steelmaking capacity is expected to come onstream in the current fiscal. This will be the largest capacity addition made by the industry in a single year in the recent past. The industry's supply pipeline is expected to remain strong in FY2025 as well, when an estimated 12.3 mtpa of capacities are lined up for commissioning. Despite this burst of new supplies, we believe that the favourable domestic demand will adequately absorb these upcoming capacities, helping improve the industry's capacity utilisation rate to ~82% in FY2024 from ~80% in

FY2023."

While the operating environment remains supportive on the domestic front, the industry, however, faces multiple headwinds in the external environment. These include a meltdown of the Chinese housing market, a key engine driving the country's steel demand, and the prospects of subpar economic growth in western economies.

Consequently, in the current fiscal, on one hand, while export opportunities remained weak for domestic mills, on the other hand, steel imports began to rise as global steel trade flows were diverted to high-growth markets like India. ICRA's analysis suggests that domestic hot-rolled coil (HRC) prices are currently trading at a premium of US\$ 40-45/MT over prevailing Chinese FoB spot export offers, which are lined up to reach Indian shores after a lag of two months. Therefore, domestic steel prices are likely to remain under check in the coming quarters even though the demand outlook is favourable.

Mirroring the trend in seaborne steel prices, domestic HRC prices corrected by ~8% during Q1 FY2024. This, along with elevated coking coal costs, nibbled at the profit margins of steel mills, leading to the industry's quarterly operating profits contracting by 18.7% in Q1 FY2024 over Q4 FY2023.

Commenting on this trend, Mr. Roy added: "Input cost pressures are, however, expected to alleviate somewhat going forward, as the coking coal costs for domestic mills are poised to sequentially moderate by around 25% in Q2 FY2024. For mills not having captive mines, iron ore costs are also expected to sequentially moderate by a modest 3-5% in the current quarter. Therefore, we expect the industry's absolute operating profits to sequentially increase by 20-30% in Q2 FY2024".

With the commodity upcycle moderating since FY2023, mill cash flows have reduced from their record highs, thus increasing the domestic steelmakers' dependence on external financing to meet committed expansion plans. However, given the aggressive deleveraging during the previous upcycle, the industry's leverage (total debt to operating profits) is still expected to remain at a comfortable level of around 2.0-2.5 times in FY2024, against a historic low watermark of 1.1 times in FY2022. Therefore, steel companies are expected to remain more resilient to withstand any worsening of the macroeconomic environment, leading ICRA to retain the sector's outlook at Stable.



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## Steel industry highlights importance of trade policy in decarbonisation efforts ahead of COP28



At a Public Forum panel on 13 September, leading steelmakers discussed how trade policy can support a level playing field for steel decarbonization. Industry executives highlighted in particular the importance of the WTO's rules-based trading system for addressing the growing risk of policy fragmentation.

In her opening remarks, Director-General Ngozi Okonjo-Iweala noted that the steel industry needs the right trade policy environment to support its decarbonization efforts, stressing the importance of an environment which should enable investments in breakthrough technologies, ensure availability of critical inputs, and increase the demand and cost competitiveness of green steel.

While a range of policy instruments will be needed to speed up decarbonization, including price and non-price measures, incentives, and standards, the DG noted that the growing fragmentation of trade policies is making it harder for the steel sector to decarbonize, creating uncertainties for producers and hampering the cross-border movement of green technologies and inputs.

She said: "The WTO can play an important role as a forum for international cooperation between private and public stakeholders to better align and coordinate trade policy for a level playing field."

Representing the United Arab Emirates' Presidency of COP28, Dr Yasar Jarrar said that enhancing coherence of steel decarbonization standards, inclusive access to technologies, and market creation for green steel were priorities for COP28's Energy and Industry Day, which will take place on 5 December. He also noted that work by the WTO on steel industry decarbonization can make a positive contribution to the upcoming COP28.

Xiao Guodong, Chief Representative for Carbon Neutrality of China Baowu Steel Group, the world's largest steelmaker, said that decarbonization marks a revolution for the steel industry. Mutual recognition of standards, including through the WTO, is important to allow steelmakers to efficiently meet downstream consumer demands. When thinking about the decarbonization transition, he said that the situation of developing

countries should be considered in terms of energy endowment, and access to technologies and inputs.

Noting that carbon pricing has an important role to play in reaching net zero for greenhouse gas emissions, Rajiv Mangal, Vice President for Safety, Health and Sustainability of Tata Steel, said that implementation of a Carbon Border Adjustment Mechanism could help provide a level playing field for steel in the European Union by ensuring that the cost of carbon is passed on to consumers. He also highlighted the importance of global convergence on financial reporting standards for emissions disclosure to allow finance to flow to the right places.

Erika Chan, Head of Sustainability at United States Steel, noted that the path to net zero requires significant investment, not just in projects and infrastructure but also in the workforce. However, she noted that the global steel market environment is an inhibiting factor to profitability of such investments. As a company that operates both blast furnaces and electric arc furnaces, she highlighted the importance of a global approach to standards that recognize multiple production routes through a sliding scale.

Ola Hansén, Public Affairs Director at H2 Green Steel, emphasized the need for a price on emissions and creating demand for near-zero steel. He also noted that in order to secure investment in their green hydrogen-based steel production, which emits 95% less greenhouse gases as compared to traditional steel production, H2 Green Steel relies on demand from upstream consumers, such as automakers, which is created through their voluntary commitments under the Science Based Targets Initiative.

In closing the session, WTO Deputy Director-General Jean-Marie Paugam highlighted the opportunity to capitalize on the positive role that trade can play for steel industry decarbonization at the upcoming COP28. He acknowledged that the private sector is asking the WTO to do more, whether contributing to the alignment of standards or making sense of divergent pricing and incentive policies.

The Public Forum session was a follow-up to the first-ever WTO Trade Forum for Decarbonization Standards: Promoting coherence and transparency in the iron and steel sector, held in March 2023. The Trade Forum brought together officials and business leaders from many of the world's largest steel-producing economies for a dialogue on how interoperable standards for measuring greenhouse gas emissions can accelerate the global scale-up of lower-emissions steelmaking.





## India tapping new markets for coking coal: Nagendra Nath Sinha, Steel Secretary

India's steel mills are exploring alternatives as they diversify coking coal sourcing. Sourcing from Australia is down to 50 per cent — from 70 per cent, in the first few months of this fiscal, while India continues to explore the possibility of tapping into Mongolia for supplies.

Australia is the largest supplier of coking coal to India's mills. Met coke price (FOB-Australia) was at \$314 per tonne as on Friday.

According to Nagendra Nath Sinha, Union Steel Secretary, Indian mills have increased sourcing from alternate countries like the USA, Russia, Canada, Indonesia, New Zealand and Singapore. Increased sourcing from these countries have led multiple options for mills here.

"Mongolia continues to be a country with which we are engaging for coking coal. On the other hand, Indian mills seem to keen to tap into new supplier countries like Russia. And mills are also experimenting with different coal grades for blending, which is a good sign," Sinha told *businessline*.

Indian coking coal imports in FY23 was over 56 mt and nearly 52 per cent of this (approximately 35 mt) was from Australia as compared 70 per cent in FY'22 when 57 mt was imported. The trend has continued this year too. In the first couple of months India imported 9.9 million tonnes of coking coal — a key steel making feedstock — of which nearly 4.9 mt was from Australia (around 50 per cent).

Russia, as per DGFT data, is the third largest supplier to India at 1.65 mt (April–June 23); while the USA is the second largest supplier at 1.96 mt. Mozambique is another key supplier, but high ash content has led to restricted demand for offerings from the African country. Despite being the world's second largest producer of crude steel, the country remains import dependent on coking coal — a key raw material.

### Naveen Jindal to assume role as non-exec director on JSPL board

Naveen Jindal, the chairman of Jindal Steel & Power (JSPL), will be re-designated as a non-executive chairman, with effect from 1 October 2023, the company said in an exchange filing here on Monday. Jindal is currently acting as an executive director, designated as chairman, which is due to end on 31 September 2023, as per the exchange filing of the steel manufacturer. "We wish to inform that the term of appointment of Mr Naveen Jindal as Executive Director, designated as Chairman, is due to end



on September 30, 2023. Mr Naveen Jindal has chosen to continue on the Board in the capacity of Non-Executive Chairman, with effect from October 1, 2023," the company said. "Accordingly, Mr Naveen Jindal will be re-designated as Non-Executive Director of the Board, with effect from October 1, 2023."

In his new role, Jindal would not be entitled to draw remuneration from the company, except for sitting fee for attending the meetings of the Board and its Committees; and compensation, if any, to be paid to non-executive directors, from time to time, the company added in the filing.

"Naveen Jindal will continue to guide the company to shape its vision of being an ever-flourishing company focused on nation building, value creation and sustainable development," it added.

### Rio Tinto CEO Says Chinese Steel Demand Is Close to Peaking



Rio Tinto Group, the world's second-largest iron ore producer, believes Chinese consumption of steel is close to topping out, with demand next year likely to be similar to 2023.

China's appetite for iron ore, the main steelmaking ingredient, has picked up in recent months as some brighter spots in the economy help to offset poor demand from the key property sector.



## News Update

### **Tata Steel: recent developments to boost profitability & ESG considerations**

Tata Steel (TSL) has unveiled a comprehensive restructuring plan for its UK operations (TSUK) with a dual focus on ensuring business continuity and enhancing sustainability. The key highlights include: Replacement of existing blast furnaces with a state-of-the-art 3 million ton per annum Electric Arc Furnace (EAF); Securing 40% of the £1.25 billion investment through grants provided by the UK government; anticipated cost differentials of £150-170 per metric ton compared to current operational costs; potential for a significant reduction in emissions, targeting a reduction to 0.4 metric tons of CO<sub>2</sub> per metric ton of steel produced from the current level of 2.16 metric tons of CO<sub>2</sub> per metric ton at UK operations and establishment of the EAF is expected to synergise with the existing scrap ecosystem in the UK.

This development is of paramount significance, especially in light of the likely reduction in support from the parent company for TSUK operations in the future.

The company holds significant market share in key sectors: 50% in automotive, 43% in construction, and 62% in packaging. This development represents an effort to optimise the struggling UK operations, boosting competitiveness and sustainability. Key points include: (i) Using a portion of the UK's 9 million tonnes of scrap for value-added purposes; Preparing UK operations for the future by sourcing more power from renewable sources, and British industry supercharger scheme, aimed at lowering electricity costs and aligning them with global economies, is expected to benefit EAF-based operations more than blast furnace-based ones. We believe that the developments surrounding TSUK will enhance the company's future readiness in terms of profitability and ESG (Environmental, Social, and Governance) considerations. As the consultation process gains momentum, we anticipate incurring further restructuring expenses and receiving policy support.

### **Jindal Stainless to invest Rs 1 bn in Rathi Super Steel for infra expansion**

Jindal Stainless is set to invest Rs 1 billion in Rathi Super Steel over the next two years, aiming to expand its presence in the infrastructure sector over the medium term. Earlier this year, Jindal Stainless acquired Rathi Super Steel, which was grappling with debt issues, for approximately Rs 2 billion through the debt resolution process.

Abhyuday Jindal, the Managing Director of Jindal Stainless, shared, "This marks our initial foray into the

realm of long products, primarily driven by the nation's emphasis on infrastructure development."

The company intends to enhance Rathi Super Steel's annual production capacity from its current 150,000 tonnes to approximately 200,000 tonnes. Currently, only a modest 2-5% of Jindal Stainless' product portfolio is relevant to the infrastructure sector, However, the company has ambitious plans to increase this proportion to 15-20% within the next two to three years, positioning itself as a significant player in this domain.

### **The Hydrogen Stream: World's first green hydrogen plant to heat steel**



Hitachi Energy has supplied Ovako with a modular eHouse solution for the electrification of a 20 MW electrolyzer in Hofors, Sweden. The project marks the world's first steel plant to use hydrogen for heating before the rolling process. Beyond steel heating, the hydrogen will fuel cell-powered trucks, and surplus heat from the plant will support district heating. Hitachi Energy's delivery includes a modular Grid-to-Stack solution, with components such as transformers, rectifiers, control equipment, and high-current connections to convert alternating current from the distribution grid into the direct current required for the electrolyzer. The company has collaborated on the system's development with Volvo Group, H2 Green Steel, and Nel Hydrogen.

Enapter has expanded its product lineup with the introduction of the "AEM Flex 120," a new AEM electrolyzer for industrial and refueling pilot projects. The AEM Flex 120 features up to 50 AEM Stack core modules, ensuring high reactivity to fluctuating renewable energy sources. It can produce approximately 53 kg of hydrogen per day at 99.999 percent purity, with the option for a dryer. This electrolyzer addresses the market gap between Enapter's AEM Electrolyser EL 4 (1 kg/day) and its megawatt-scale AEM Multicore (450 kg/day), and the company is scaling up its production capacities to meet demand.

The Port of Rotterdam and the inland Port of Duisburg have jointly presented the findings of a feasibility study focused on North Rhine-Westphalia, Germany. The results show a significant local increase in demand for low-





carbon hydrogen, exceeding 3 million tons per year until 2045. To meet this growing demand for green hydrogen in the medium term, the study recommends completing the first hydrogen pipeline between the two ports by 2027. Subsequently, pipelines for hydrogen derivatives and CO2 export should follow, complementing the essential roles of inland shipping and rail transport.

Rina, in collaboration with SEA Aeroporti di Milano and the local branch of the Italian enterprises federation Confindustria, has launched the Hydrogen Valley Malpensa project – Italy's first hydrogen valley in an airport environment. The project's objective is to establish a complete hydrogen supply chain ecosystem by September 2027. Participants in the project include Air Pullman, Artelys, Circe, Emisia, and Lhyfe Labs, making it a collaborative effort involving various stakeholders.

Nuvera Fuel Cells has agreed to supply a hydrogen fuel cell system for a reachstacker developed by Hyster, which has been delivered to the Port of Valencia in Spain as part of the H2Ports project. This initiative aims to introduce hydrogen-powered vehicles and equipment into port operations. "The hydrogen is stored in high-pressure tanks and can be refilled less than 15 minutes," said Nuvera Fuel Cells. "The hydrogen fuel cell charges the batteries, which power the electric motors and hydraulic systems, enabling the reachstacker to lift laden containers with comparable performance to a diesel alternative."

Irish Rail and Digas have signed a contract for a proof-of-concept project to convert a diesel locomotive from traditional diesel fuel to hydrogen. As part of this €1.5 million project, Irish Rail will provide the 071 Class Diesel Locomotive for the conversion, while Digas will manufacture and install a Hydrogen Internal Combustion Engine (H2 ICE). The project's success could demonstrate a practical and cost-effective means to decarbonize and operate existing diesel locomotives with hydrogen-powered engines, offering environmental benefits for rail transportation.

## Sourav Ganguly to start steel factory in West Bengal

Former Indian cricket captain Sourav Ganguly will be embarking on a new venture as he enters the world of industry by initiating a steel factory in Salboni, located in Paschim Medinipur, West Bengal. Accompanying West Bengal Chief Minister Mamata Banerjee during her 12-day visit to Spain and Dubai, Ganguly revealed that the factory's construction would be completed within five to six months, reported PTI. Addressing the 'Bengal Global Business Summit (BGBS)' in Madrid on September 14, Ganguly mentioned that the state-of-the-art facility would be completed in approximately one year.

Expressing his gratitude to the chief minister, Ganguly stated, "I just take this opportunity to thank the chief minister as we are starting to build a third steel plant in Bengal. A lot of us believe that I only played the sport. But

we started a small steel plant in 2007, and in five to six months we will start building our new steel plant in Medinipur."

He appreciated West Bengal's welcoming approach to business and said, "This state has always invited the rest of the world for business. That is why the CM is in this country today. It is very clear that the government wants to work for the development of the state and the youth."

He said that his experience demonstrated the efficiency of the process, irrespective of his current association with the Chief Minister. "I must tell you this is from practical experience and not because I am with the Chief Minister, the entire process just took four to five months to complete," Ganguly remarked.

## Tata Steel to receive £500 million from Britain to decarbonise Port Talbot

The UK government has agreed to give a grant of £500 million to help Tata Steel decarbonise its Port Talbot project at Wales, after months of negotiations to save the project, the company said in a statement.

Tata Steel and the UK government jointly announced the agreement to invest in state-of-the-art Electric Arc Furnace steelmaking at the Port Talbot site with a capital cost of £1.25 billion, which will include the government grant of £500 million. Tata Steel had sought a more substantial sum from the government to support the project during early negotiations.

On the deal, Tata Group Chairman N Chandrasekaran said, "The agreement with the UK Government is a defining moment for the future of the steel industry and indeed the industrial value chain in the UK...The proposed investment will preserve significant employment and presents a great opportunity for the development of a green technology-based industrial ecosystem in South Wales."

Tata Steel said that the project remains subject to all relevant information and consultation processes before decisions are made. Subject to informing and consulting, it is proposed that this new investment project could be operational within 36 months of the receipt of relevant regulatory and planning approvals.

*Tata Steel and the UK government jointly announced the agreement with a capital cost of £1.25 billion, which will include the government grant of £500 million.*

## Thailand launches probe into Chinese rolled steel imports

Thailand has launched an investigation into imports of Chinese rolled steel for evading anti-dumping measures, the commerce ministry said in a statement.

The probe includes hot-rolled steel sheets in coils and non-coils from 17 manufacturers in China, according to the statement published on Sept 15.

"There is sufficient evidence that there is avoidance of anti-dumping duties and so an investigation is warranted," the statement said. The announcement comes after four Thai steel makers lodged a complaint with Thailand's Foreign Trade Department.



# Odisha Govt announces special subsidy scheme to boost stainless steel Industry at GSSE 2023 expo



The Odisha government has unveiled an ambitious special subsidy scheme to boost the stainless-steel Industry in the state.

This announcement was made during the inauguration of the Global Stainless-Steel Expo 2023 (GSSE 2023) in Mumbai, further solidifying Odisha's commitment to becoming the 'Stainless Steel Destination' for the world.

The GSSE 2023 event was inaugurated on Thursday by dignitaries, including Principal Secretary of Odisha's Industries department Hemant Sharma, Managing Director of Jindal Stainless Ltd Abhyuday Jindal, GSSE Steering Committee Member and Former Secretary, Ministry of Steel, Aruna Sharma and Director of Virgo Communications and Exhibitions, Anitha Raghunath.

The Minister for Industries, MSMEs and Energy, Government of Odisha, Pratap Kesh has consistently positioned Odisha as a preferred location for the metal and allied industries due to its natural resources and advantageous ecosystem. The partners and visitors of the GSSE Expo will have the opportunity to interact with the Government of Odisha.

In his inaugural address, Abhyuday Jindal said, "It won't be an exaggeration to say that stainless steel is omnipresent, and even for a big event like the G20, stainless steel adorned the roads. Be it the art installations in Lutyens Delhi or the security barriers, stainless steel made its presence felt. It was a historic moment to witness stainless steel reach the moon when the Chandrayaan-3 made a soft landing on the lunar surface recently."

He also touched upon the industrial park in-the-making in Odisha by his company, and said it is the first-ever stainless steel Industrial Park in India with the vision to strengthen the industry, according to a press release.

A special report on stainless steel titled 'India's Amritkal' by SteelMint was unveiled at the event. According to the report, the stainless-steel industry struggled to regain equilibrium due to the lingering impact of weakened

global and domestic demand. The report underlined that the Indian Stainless-Steel industry quickly recovered by FY23, reaching about 3.5 mnt. Looking forward, SteelMint's forecasts are intriguing, estimating demand to rise to 4.5 mnt by FY25.

In his address, Hemant Sharma said Odisha is making significant contributions to the stainless-steel sector and the minerals sector. Being the largest producer of iron ore and bauxite in India is indeed a noteworthy achievement.

Odisha's status as the largest producer of iron ore and bauxite showcases its rich mineral resources. This positions the state as a critical player in the raw materials supply chain for various industries, including steel and aluminium.

He announced Jindal Stainless steel Plant is a massive 1.2 MTPA stainless steel plant and proposed plant expansion to 3.2 MTPA by Jindal Stainless Limited (JSL) in Odisha is a game-changer. This investment represents a substantial commitment to the stainless-steel sector in the state and will likely contribute to its growth and prominence in the industry.

Special Subsidy Scheme by the Odisha Government :

1. 20% Capital Investment Subsidy: Under this scheme, businesses investing in the stainless steel downstream sector in Odisha will receive a substantial 20% Capital Investment Subsidy on their investments. This lucrative incentive is designed to stimulate growth and innovation within the sector.
2. Electricity Duty Exemption: Businesses operating in the stainless steel downstream sector can avail a power tariff subsidy of Rs2/unit and 100% exemption on electricity duty, significantly reducing operational costs and enhancing the overall competitiveness of the industry.
3. ESI/EPF Reimbursement: To further support the workforce and promote job creation, the scheme provides for a 100% reimbursement of Employee State Insurance (ESI) and Employee Provident Fund (EPF) contributions for up to five years.
4. Land Allocation: The Odisha Government has made a commitment to allocate land offering businesses an exceptional opportunity to establish or expand their operations in a world-class industrial environment.

Speaking at the event, Anitha Raghunath said that the demand for stainless steel in India is expected to grow at an average of 9 to 10 per cent per annum over the next few financial years, doubling the growth rate of 4.5 per cent in the last five financial years.





## Sustainable Mobility – Global Benchmark SIAM's 63rd Annual Convention

New Delhi, 12 September 2023: During 2nd plenary session of SIAM's 63rd Annual Convention themed "Sustainable Mobility – Global Benchmarks", Mr. Vinod Aggarwal, President of SIAM and Managing Director & CEO of Volvo Eicher Commercial Vehicles Ltd addressing the gathering, said, "We need to learn from the global strategies we have been witnessing in the automotive sector and examine their applicability in India. With increased focus on sustainability, prominent avenue for the auto industry's growth lies in the adoption and promotion of clean-energy vehicles. This includes embracing other powertrains, including eco-friendly flexi fuels and making vehicles compliant to it."

Mr. Guenther F. Apfalter, President of Magna Europe & Asia, delivered an insightful presentation on Fuel Cell Electric Vehicles (FCEVs) and Battery Electric Vehicles (BEVs) from a European perspective. Highlighting the evolving landscape of powertrains in Europe and underscored the significance of clean and efficient mobility solutions. Prof. Suani Coelho, Professor, Institute of Energy and Environment and Coordinator of the Research Group of Bioenergy, University of São Paulo, shed light on Brazil's pioneering role in sustainable transportation through biofuels, offering valuable insights into innovative approaches to clean energy.

Moving forward, Mr. Ashim Sharma, Senior Partner &

Group Head of Business Performance Improvement Consulting (Auto, Engg. & Logistics) at Nomura Research Institute, provided valuable insights into Sustainable Mobility Learnings from Japan. His presentation highlighted Japan's leadership in shaping the future of transportation, emphasizing transferable lessons that can enhance sustainability and efficiency worldwide. Mr. Andreas Tschiesner, Senior Partner at McKinsey & Company, presented a thought-provoking Global Perspective on Material Circularity.

### About SIAM

The Society of Indian Automobile Manufacturers (SIAM) is an apex national body representing major vehicle and vehicular engine manufacturers in India. It is a society with charitable objectives registered under the Societies Registration Act 1860. Its objectives include enhancing the contribution of the automobile industry in the growth and development of the Indian economy, assisting the automobile industry in meeting its social obligation, encouraging the efficiency of the industry in general, particularly in India, and improving and protecting the environment, including global warming, pollution control and safety of automobile vehicle users and public at large. Recognizing these objectives, SIAM has been granted registration under the Income Tax Act 1961 as an institution with a charitable purpose.

## Indian automobile domestic sales up, exports down in August: SIAM

The Indian automotive industry in August rolled out about 23.85 lakh vehicles comprising passenger carriers, three/two-wheelers and quadricycles, according to the Society of Indian Automobile Manufacturers (SIAM).

While the domestic vehicle sales went up last month as compared to the corresponding period the previous year, the exports have come down. According to SIAM, during August 2023, the domestic sales of - passenger carriers (cars, utility vehicles, vans), three-wheelers, two-wheelers and quadricycles) – stood at about 19.45 lakh units up from 18.77 lakh units sold in August 2022.

As regards exports, the industry shipped out about 3.80 lakh units last month, down from about 4.02 lakh units exported during August 2022.

Commenting on sales data of August 2023, Mr Vinod Aggarwal, President, of SIAM said, "Last month saw the highest ever August month sales for Passenger Vehicles and Three-Wheelers, while Two-Wheeler sales remained at levels similar to a year ago. We have also observed

good growth in the Commercial Vehicle segment in August 2023. Based on the performance of last month, we are even more optimistic for demand to pick up during the festive season, enabled by a positive economic outlook and the revival of monsoon after a deficit in August."

Termining the performance of the auto industry as encouraging in August 2023, President of the Society of Indian Automobile Manufacturers (SIAM) – Vinod Aggarwal – expects sales to improve further with the upcoming festive season. Describing growth as good in all segments, including Passenger Vehicles (PV), Commercial Vehicles (CV) & three-wheelers, he said that more consumers are considering buying (EVs) across both rural and urban areas.

Pointing to good traction for EVs among two-wheelers, and three-wheelers and an increasing migration in four-wheelers, he expressed hope that the government's new scheme on electric buses will increase their numbers on



# Statistics

roads.

Commenting on the August 2023 performance, Mr Rajesh Menon, Director General, SIAM said, "3.59 lakh units of Passenger Vehicles were sold in August, with a growth of 9.40% compared to August 2022. Three-Wheelers also reported a significant growth of 68.79%, posting sales of about 0.65 lakh units in August 2023. 15.67 Lakh Two-Wheelers were sold last month in the country, with a growth of 0.59% compared to August 2022."

| SIAM<br>Summary Report: Cumulative Production, Domestic Sales & Exports data for the period of April-August 2023 |                    |                    |                  |                  |                  |                  |                                  |
|--|--------------------|--------------------|------------------|------------------|------------------|------------------|----------------------------------|
| Category<br>Segment/Subsegment   | Production         |                    | Domestic Sales   |                  | Exports          |                  | Report I<br>(Number of Vehicles) |
|  | April-August       |                    | April-August     |                  | April-August     |                  |                                  |
|  | 2022-23            | 2023-24            | 2022-23          | 2023-24          | 2022-23          | 2023-24          | 2022-23                          |
| <b>Passenger Vehicles (PVs)*</b>   |                    |                    |                  |                  |                  |                  |                                  |
| Passenger Cars   | 8,51,603           | 8,23,465           | 6,88,506         | 6,43,613         | 1,70,448         | 1,73,356         |                                  |
| Utility Vehicles (UVs)   | 8,43,905           | 10,20,880          | 7,37,157         | 9,09,053         | 98,096           | 98,896           |                                  |
| Vans   | 60,177             | 59,960             | 59,907           | 59,544           | 178              | 3,381            |                                  |
| <b>Total Passenger Vehicles (PVs)</b>  | <b>17,55,685</b>   | <b>19,04,305</b>   | <b>14,85,570</b> | <b>16,12,210</b> | <b>2,68,722</b>  | <b>2,75,633</b>  |                                  |
| <b>Three Wheelers</b>  |                    |                    |                  |                  |                  |                  |                                  |
| Passenger Carrier  | 2,75,086           | 3,38,000           | 1,02,195         | 2,10,719         | 1,77,642         | 1,25,260         |                                  |
| Goods Carrier  | 37,329             | 42,332             | 35,020           | 39,698           | 1,842            | 842              |                                  |
| E-Rickshaw   | 7,214              | 11,949             | 7,476            | 13,421           | -                | -                |                                  |
| E-Cart   | 1,300              | 1,158              | 1,295            | 1,434            | -                | -                |                                  |
| <b>Total Three Wheelers</b>  | <b>3,20,929</b>    | <b>3,93,449</b>    | <b>1,45,986</b>  | <b>2,65,272</b>  | <b>1,79,484</b>  | <b>1,26,102</b>  |                                  |
| <b>Two Wheelers</b>  |                    |                    |                  |                  |                  |                  |                                  |
| Scooter/ Scooterette   | 23,81,290          | 24,73,088          | 21,91,208        | 22,76,285        | 1,92,844         | 2,14,527         |                                  |
| Motorcycle/Step-Throughs   | 59,04,931          | 57,61,388          | 42,92,050        | 45,35,383        | 16,15,830        | 11,68,494        |                                  |
| Mopeds   | 1,79,697           | 1,89,171           | 1,80,007         | 1,77,964         | 1,110            | 666              |                                  |
| <b>Total Two Wheelers</b>  | <b>84,65,918</b>   | <b>84,23,645</b>   | <b>66,63,265</b> | <b>69,89,612</b> | <b>18,09,784</b> | <b>13,83,687</b> |                                  |
| Quadricycle  | 817                | 1,768              | 218              | 371              | 642              | 1,412            |                                  |
| <b>Grand Total</b>   | <b>1,05,43,349</b> | <b>1,07,23,167</b> | <b>82,95,039</b> | <b>88,67,465</b> | <b>22,58,632</b> | <b>17,86,834</b> |                                  |

\* BMW, Mercedes, JLR, Volvo Auto data is not available and Tata Motors data is available for April-June only  
Source: SIAM, Auto and Vehicle Manufacturers Association of India (2023)

| SIAM<br>Category & Company wise Summary Report for the month of August 2023 and Cumulative for April-August 2023 |                 |                 |                  |                  |                 |                 |                  |                  |               |               |                 |                 |                                   |
|--|-----------------|-----------------|------------------|------------------|-----------------|-----------------|------------------|------------------|---------------|---------------|-----------------|-----------------|-----------------------------------|
| Category<br>Segment/Subsegment<br>Manufacturer   | Production      |                 |                  |                  | Domestic Sales  |                 |                  |                  | Exports       |               |                 |                 | Report II<br>(Number of Vehicles) |
|  | August          |                 | April-August     |                  | August          |                 | April-August     |                  | August        |               | April-August    |                 |                                   |
|  | 2022            | 2023            | 2022-23          | 2023-24          | 2022            | 2023            | 2022-23          | 2023-24          | 2022          | 2023          | 2022-23         | 2023-24         |                                   |
| <b>Passenger Vehicles (PVs)</b>  |                 |                 |                  |                  |                 |                 |                  |                  |               |               |                 |                 |                                   |
| CA India Automobiles Pvt Ltd   | 1,650           | 523             | 8,402            | 4,514            | 1,321           | 299             | 6,248            | 2,513            | 435           | 503           | 1,033           | 2,332           |                                   |
| Force Motors Ltd   | 68              | 142             | 351              | 544              | 52              | 119             | 348              | 532              | -             | -             | 1               | 2               |                                   |
| Force Cars India Ltd   | 9,935           | 10,996          | 40,512           | 35,378           | 7,769           | 7,880           | 36,449           | 27,797           | 2,358         | 2,189         | 10,093          | 8,595           |                                   |
| Hyundai Motor India Ltd  | 61,600          | 71,698          | 2,98,100         | 3,21,543         | 49,510          | 55,830          | 2,35,305         | 2,52,634         | 12,700        | 17,805        | 60,571          | 66,705          |                                   |
| Isuzu Motors India Pvt Ltd   | 155             | -               | 1,440            | 90               | 45              | 30              | 250              | 163              | -             | -             | 154             | -               |                                   |
| Kia Motors India Pvt Ltd   | 31,026          | 23,534          | 1,46,188         | 1,34,907         | 22,322          | 19,219          | 1,06,106         | 1,00,584         | 8,174         | 5,308         | 37,630          | 34,238          |                                   |
| Mahindra & Mahindra Ltd  | 32,047          | 36,964          | 1,95,115         | 1,76,185         | 29,852          | 37,270          | 1,34,275         | 1,73,647         | 682           | 930           | 3,148           | 5,655           |                                   |
| Maruti Suzuki India Ltd  | 1,56,041        | 1,63,545        | 7,90,174         | 8,00,382         | 1,34,166        | 1,56,114        | 6,46,170         | 7,22,296         | 27,382        | 24,367        | 1,10,372        | 1,09,300        |                                   |
| MG Motor India Pvt Ltd   | 3,939           | 3,063           | 10,685           | 23,827           | 3,823           | 3,113           | 15,355           | 21,109           | -             | -             | -               | -               |                                   |
| Nissan Motor India Pvt Ltd   | 9,838           | 8,790           | 40,290           | 31,155           | 3,283           | 2,268           | 14,706           | 12,197           | 5,833         | 1,917         | 21,726          | 17,850          |                                   |
| PCA Motors Pvt. Ltd.   | 930             | 430             | 1,375            | 4,005            | 850             | 525             | 1,577            | 3,725            | -             | 196           | -               | 1,048           |                                   |
| Renault India Pvt Ltd  | 9,691           | 5,961           | 49,096           | 26,035           | 7,012           | 3,833           | 36,061           | 21,638           | 2,220         | 2,988         | 12,618          | 7,657           |                                   |
| Scoia Auto India Pvt Ltd   | 3,832           | 3,396           | 28,098           | 23,228           | 4,222           | 4,207           | 24,448           | 20,038           | -             | 59            | -               | 729             |                                   |
| Tata Motors Ltd*   | NA              | NA              | 1,31,376         | 1,43,661         | NA              | NA              | 1,31,940         | 1,45,062         | NA            | NA            | 222             | 367             |                                   |
| Tuyola Kirloskar Motor Pvt. Ltd  | 9,930           | 32,578          | 40,052           | 1,38,112         | 14,939          | 20,944          | 76,053           | 92,381           | -             | 1,940         | 45              | 6,842           |                                   |
| Volkswagen India Pvt Ltd   | 3,116           | 10,260          | 17,843           | 40,938           | 2,041           | 4,171           | 15,340           | 17,700           | 1,116         | 6,221         | 9,370           | 18,660          |                                   |
| <b>Total Passenger Vehicles (PVs)</b>  | <b>3,34,098</b> | <b>3,74,018</b> | <b>17,55,685</b> | <b>19,04,305</b> | <b>2,81,210</b> | <b>3,13,715</b> | <b>14,85,570</b> | <b>16,12,210</b> | <b>54,698</b> | <b>63,883</b> | <b>2,68,722</b> | <b>2,75,633</b> |                                   |

\* Only cumulative data is available for April-June  
NA= Not Available

| SIAM<br>Category & Company wise Summary Report for the month of August 2023 and Cumulative for April-August 2023 |                  |                  |                    |                    |                  |                  |                  |                  |                 |                 |                  |                  |                                   |
|--|------------------|------------------|--------------------|--------------------|------------------|------------------|------------------|------------------|-----------------|-----------------|------------------|------------------|-----------------------------------|
| Category<br>Segment/Subsegment<br>Manufacturer   | Production       |                  |                    |                    | Domestic Sales   |                  |                  |                  | Exports         |                 |                  |                  | Report II<br>(Number of Vehicles) |
|  | August           |                  | April-August       |                    | August           |                  | April-August     |                  | August          |                 | April-August     |                  |                                   |
|  | 2022             | 2023             | 2022-23            | 2023-24            | 2022             | 2023             | 2022-23          | 2023-24          | 2022            | 2023            | 2022-23          | 2023-24          |                                   |
| <b>Three Wheelers</b>  |                  |                  |                    |                    |                  |                  |                  |                  |                 |                 |                  |                  |                                   |
| Ati A Auto Ltd   | 1,024            | 2,614            | 8,193              | 8,108              | 1,658            | 2,371            | 7,787            | 8,061            | 289             | 391             | 1,274            | 849              |                                   |
| Bea Auto Ltd   | 14,947           | 53,617           | 1,37,557           | 2,16,836           | 22,653           | 77,707           | 79,885           | 1,75,807         | 22,367          | 12,169          | 91,525           | 64,017           |                                   |
| Commercial Engines Pvt Ltd   | 650              | 650              | 3,830              | 2,508              | 387              | 430              | 2,774            | 2,130            | -               | -               | -                | -                |                                   |
| Force Motors Ltd   | 278              | 394              | 1,072              | 1,573              | -                | -                | -                | -                | 408             | 144             | 1,103            | 1,848            |                                   |
| Mahindra & Mahindra Ltd  | 5,173            | 5,761            | 15,607             | 20,728             | 4,793            | 7,044            | 18,325           | 27,305           | 55              | 24              | 159              | 78               |                                   |
| Passenger Vehicles Pvt Ltd   | 10,943           | 3,752            | 43,083             | 42,794             | 7,147            | 3,061            | 30,356           | 37,417           | 3,528           | 610             | 11,745           | 4,757            |                                   |
| TVS Motor Company Ltd  | 1,191            | 15,172           | 7,344              | 1,911              | 1,331            | 1,774            | 3,587            | 7,393            | 16,887          | 12,622          | 17,844           | 54,577           |                                   |
| <b>Total Three Wheelers</b>  | <b>81,036</b>    | <b>84,790</b>    | <b>3,20,929</b>    | <b>3,93,449</b>    | <b>39,366</b>    | <b>64,783</b>    | <b>1,45,986</b>  | <b>2,65,272</b>  | <b>44,188</b>   | <b>25,970</b>   | <b>1,79,484</b>  | <b>1,26,102</b>  |                                   |
| <b>Two Wheelers</b>  |                  |                  |                    |                    |                  |                  |                  |                  |                 |                 |                  |                  |                                   |
| Asian Diesel Pvt Ltd   | 6,811            | 9,251            | 15,921             | 42,130             | 6,441            | 9,245            | 19,728           | 40,920           | -               | -               | -                | -                |                                   |
| Bea Auto Ltd   | 4,43,146         | 2,46,820         | 15,15,913          | 14,39,932          | 2,39,638         | 1,03,497         | 7,12,646         | 9,44,802         | 21,787          | 1,24,211        | 1,05,767         | 5,97,496         |                                   |
| Hero Cycles Pvt Ltd  | 2,70,003         | 4,39,828         | 22,35,451          | 27,65,327          | 2,50,743         | 4,72,547         | 22,09,580        | 21,87,491        | 11,556          | 15,763          | 83,700           | 71,138           |                                   |
| Hero Cycles & Scooters India Pvt Ltd   | 4,70,657         | 4,93,809         | 20,62,143          | 18,51,097          | 4,23,223         | 4,31,200         | 18,21,132        | 17,47,282        | 39,307          | 28,590          | 1,32,512         | 1,29,977         |                                   |
| India Kawasaki Motors Pvt Ltd  | 183              | 273              | 666                | 1,217              | 263              | 283              | 1,018            | 1,318            | -               | -               | -                | -                |                                   |
| India Yamaha Motor Pvt Ltd   | 32,207           | 83,370           | 3,85,677           | 3,76,676           | 59,650           | 98,227           | 2,64,795         | 2,80,153         | 30,585          | 18,734          | 1,35,366         | 61,980           |                                   |
| Mahindra Two Wheelers Ltd  | -                | -                | 72                 | -                  | 23               | -                | -                | -                | -               | -               | -                | -                |                                   |
| Omni Auto Pvt. Ltd.  | 12,746           | 2,357            | 52,269             | 7,134              | 12,009           | 2,300            | 56,823           | 1,072            | 30              | -               | 78               | -                |                                   |
| Peggy & Veer Pvt Ltd   | 8,147            | 4,039            | 28,846             | 21,963             | 3,248            | 3,270            | 24,977           | 16,187           | 1,884           | 781             | 3,303            | 1,977            |                                   |
| Royal Enfield (Unit of) Fisher Motors  | 79,087           | 85,540           | 3,44,531           | 4,07,513           | 59,680           | 68,260           | 2,67,387         | 3,49,696         | 7,290           | 8,190           | 45,800           | 56,730           |                                   |
| Suzuki Motorcycle India Pvt Ltd  | 80,563           | 97,667           | 3,32,507           | 4,66,197           | 31,857           | 33,045           | 1,80,320         | 3,00,712         | 1,200           | 20,291          | 77,000           | 1,12,217         |                                   |
| Triumph Motorcycles India Pvt Ltd  | 35               | 10               | 291                | 103                | 92               | 84               | 248              | 408              | -               | -               | -                | -                |                                   |
| TVS Motor Company Ltd  | 3,10,373         | 3,71,478         | 14,78,774          | 18,30,529          | 2,38,326         | 2,76,879         | 10,06,372        | 12,73,308        | 79,274          | 75,491          | 4,61,890         | 3,40,977         |                                   |
| <b>Total Two Wheelers</b>  | <b>18,60,777</b> | <b>19,16,789</b> | <b>84,65,918</b>   | <b>84,23,645</b>   | <b>15,37,426</b> | <b>15,66,994</b> | <b>68,63,265</b> | <b>69,89,612</b> | <b>3,05,692</b> | <b>2,80,855</b> | <b>18,09,784</b> | <b>13,83,687</b> |                                   |
| <b>Quadricycle</b>   |                  |                  |                    |                    |                  |                  |                  |                  |                 |                 |                  |                  |                                   |
| TVS Motor Ltd  | 160              | 304              | 617                | 1,698              | 16               | 119              | 218              | 371              | 102             | 168             | 642              | 1,413            |                                   |
| <b>Total Quadricycle</b>   | <b>160</b>       | <b>304</b>       | <b>617</b>         | <b>1,768</b>       | <b>64</b>        | <b>110</b>       | <b>218</b>       | <b>371</b>       | <b>102</b>      | <b>168</b>      | <b>642</b>       | <b>1,412</b>     |                                   |
| <b>Grand Total</b>   | <b>22,76,941</b> | <b>23,86,801</b> | <b>1,06,43,349</b> | <b>1,07,23,167</b> | <b>18,77,072</b> | <b>19,46,102</b> | <b>82,95,039</b> | <b>88,67,465</b> | <b>4,02,880</b> | <b>3,00,876</b> | <b>22,58,632</b> | <b>17,86,834</b> |                                   |

Source: SIAM, Auto and Vehicle Manufacturers Association of India (2023)





| SIAM   |            |          |              |          |                |          |              |          |         |        |                      |          |
|--|------------|----------|--------------|----------|----------------|----------|--------------|----------|---------|--------|----------------------|----------|
| Sub-segment & Company wise Production, Domestic Sales & Exports Report for the month of August 2023 and Cumulative for April-August 2023                         |            |          |              |          |                |          |              |          |         |        |                      |          |
|  |            |          |              |          |                |          |              |          |         |        | Report IV            |          |
|  |            |          |              |          |                |          |              |          |         |        | (Number of Vehicles) |          |
| Category   | Production |          |              |          | Domestic Sales |          |              |          | Exports |        |                      |          |
|  | August     |          | April-August |          | August         |          | April-August |          | August  |        | April-August         |          |
| Segment/Subsegment   | 2022       | 2023     | 2022-23      | 2023-24  | 2022           | 2023     | 2022-23      | 2023-24  | 2022    | 2023   | 2022-23              | 2023-24  |
| Manufacturer   |            |          |              |          |                |          |              |          |         |        |                      |          |
| <b>Passenger Vehicles (PVs)</b>  |            |          |              |          |                |          |              |          |         |        |                      |          |
| <b>A: Passenger Cars - Upto 5 Seats</b>  |            |          |              |          |                |          |              |          |         |        |                      |          |
| <b>Micro: Seats upto-4, Length Normally &lt;3200 mm, Body Style-Hatchback, Engine Displacement Normally upto 0.8 Litre</b>                                       |            |          |              |          |                |          |              |          |         |        |                      |          |
| <b>Specialty</b>   |            |          |              |          |                |          |              |          |         |        |                      |          |
| MG Motor India Pvt Ltd (Dancer EV)   | -          | NA       | -            | 3,952    | -              | NA       | -            | 1,914    | -       | -      | -                    | -        |
| <b>Total Micro</b>   | -          | -        | -            | 3,952    | -              | -        | -            | 1,914    | -       | -      | -                    | -        |
| <b>Mini: Seats upto-5, Length Normally &lt;3600 mm, Body Style-Hatchback, Engine Displacement Normally upto 1.0 Litre</b>  |            |          |              |          |                |          |              |          |         |        |                      |          |
| <b>Regular</b>   |            |          |              |          |                |          |              |          |         |        |                      |          |
| Maruti Suzuki India Ltd (Ato, Spresso)   | 25,788     | 11,932   | 1,17,724     | 24,264   | 22,162         | 12,259   | 97,152       | 62,199   | 2,072   | 2,139  | 21,729               | 17,999   |
| Rangoo (New Pvt Ltd (Kwid))  | 2,757      | 2,991    | 13,640       | 6,911    | 1,734          | 863      | 9,179        | 5,179    | 1,083   | 1,026  | 4,026                | 3,577    |
| <b>Total Mini</b>  | 28,545     | 14,923   | 1,26,644     | 90,965   | 23,896         | 13,092   | 1,06,881     | 67,072   | 3,155   | 3,967  | 26,366               | 21,546   |
| <b>Compact: Seats upto-5, Length Normally between 3600 - 4000 mm, Body Style-Sedan/Estate/Hatch/Notchback, Engine Displacement Normally upto 1.4 Litre</b>       |            |          |              |          |                |          |              |          |         |        |                      |          |
| <b>Regular</b>   |            |          |              |          |                |          |              |          |         |        |                      |          |
| Honda Cars India Ltd (Amaze, Jazz)   | 5,991      | 4,351    | 23,084       | 17,737   | 3,866          | 2,534    | 19,870       | 17,073   | 177     | 69     | 455                  | 424      |
| Hyundai Motor India Ltd (Aura, Grand i10, 20i, Santro, Xcent)  | 26,966     | 26,189   | 1,57,205     | 1,17,579 | 21,270         | 17,994   | 1,32,504     | 64,915   | 4,976   | 5,615  | 28,931               | 36,130   |
| Maruti Suzuki India Ltd (DFM Model # Baleno, Celoria, Ciaz)  | 65,705     | 68,124   | 4,35,207     | 4,39,540 | 71,667         | 77,451   | 3,67,262     | 3,63,926 | 5,512   | 15,630 | 67,250               | 62,211   |
| Tata Motors Ltd (Altroz, Tigor, Tiggor)  | NA         | NA       | 47,997       | 30,472   | NA             | NA       | 42,152       | 57,223   | NA      | NA     | 54                   | 57       |
| Toyota Kirloskar Motor Pvt Ltd (Cinnza)  | -          | -        | -            | 3,977    | 1,952          | 1,952    | 2,526        | 22,155   | -       | -      | -                    | -        |
| Volkswagen India Pvt Ltd (Polo)  | -          | -        | 674          | -        | -              | -        | 753          | -        | -       | -      | 1,095                | -        |
| <b>Total Compact</b>   | 1,16,161   | 1,16,884 | 6,24,345     | 6,16,605 | 99,844         | 99,041   | 5,39,069     | 5,26,728 | 14,686  | 22,312 | 87,786               | 97,828   |
| <b>Super Compact: Seats upto-5, Length Normally between 4000 - 4250 mm, Body Style-Sedan/Estate/Hatch/Notchback, Engine Displacement Normally upto 1.6 Litre</b> |            |          |              |          |                |          |              |          |         |        |                      |          |
| <b>Regular</b>   |            |          |              |          |                |          |              |          |         |        |                      |          |
| Mahindra & Mahindra Ltd (Verito)   | -          | -        | -            | -        | 99             | -        | 143          | -        | -       | -      | -                    | -        |
| <b>Total Super Compact</b>   | -          | -        | -            | -        | 99             | -        | 143          | -        | -       | -      | -                    | -        |
| <b>Mid-Size: Seats upto-5, Length Normally between 4250 - 4500 mm, Body Style-Sedan/Estate/Hatch/Notchback, Engine Displacement Normally upto 1.6 Litre</b>      |            |          |              |          |                |          |              |          |         |        |                      |          |
| <b>Regular</b>   |            |          |              |          |                |          |              |          |         |        |                      |          |
| Honda Cars India Ltd (City)  | 4,768      | 5,610    | 25,497       | 14,700   | 3,488          | 1,494    | 15,867       | 1,902    | 2,171   | 2,116  | 10,379               | 7,669    |
| Hyundai Motor India Ltd (Verna)  | 5,845      | 6,897    | 23,097       | 33,576   | 1,734          | 9,678    | 7,678        | 17,123   | 4,094   | 5,403  | 15,491               | 20,119   |
| Maruti Suzuki India Ltd (Ciaz)   | 2,515      | 2,504    | 9,888        | 11,972   | 1,576          | 849      | 5,537        | 5,960    | 888     | 1,609  | 3,803                | 4,112    |
| Nissan Motor India Pvt Ltd (Sunni)   | 4,260      | 1,973    | 19,156       | 13,769   | -              | -        | -            | -        | 4,876   | 1,325  | 18,982               | 9,217    |
| Volkswagen India Pvt Ltd (Vento, Virtus)   | 1,447      | 5,503    | 9,967        | 23,935   | 679            | 9,143    | 5,415        | 6,601    | 830     | 3,194  | 7,697                | 12,257   |
| <b>Total Mid-Size</b>  | 19,525     | 24,787   | 87,604       | 1,02,699 | 7,811          | 7,069    | 35,418       | 39,778   | 12,609  | 13,645 | 56,308               | 63,970   |
| <b>Executive: Seats upto-5, Length Normally between 4500 - 4700 mm, Body Style-Sedan/Estate/Notchback, Engine Displacement Normally upto 2 Litre</b>             |            |          |              |          |                |          |              |          |         |        |                      |          |
| <b>Regular</b>   |            |          |              |          |                |          |              |          |         |        |                      |          |
| Skoda Auto India Pvt Ltd (Octavia, Slavia)   | 2,293      | 818      | 13,283       | 9,502    | 2,060          | 1,357    | 12,125       | 9,291    | -       | 3      | -                    | 12       |
| <b>Total Executive</b>   | 2,293      | 818      | 13,283       | 9,502    | 2,060          | 1,357    | 12,125       | 9,291    | -       | 3      | -                    | 12       |
| <b>Premium: Seats upto-5, Length Normally between 4700 - 5000 mm, Body Style-Sedan/Estate, Engine Displacement Normally upto 3 Litre</b>                         |            |          |              |          |                |          |              |          |         |        |                      |          |
| <b>Regular</b>   |            |          |              |          |                |          |              |          |         |        |                      |          |
| Skoda Auto India Pvt Ltd (S. Jerbi)  | 137        | -        | 647          | -        | 135            | -        | 647          | 151      | -       | -      | -                    | -        |
| <b>Total Premium</b>   | 137        | -        | 647          | -        | 135            | -        | 647          | 151      | -       | -      | -                    | -        |
| <b>Total Passenger Cars</b>  | 1,60,708   | 1,55,806 | 8,51,603     | 8,23,465 | 1,33,477       | 1,20,031 | 6,88,506     | 6,43,613 | 30,409  | 39,927 | 1,70,448             | 1,73,366 |

\* Only cumulative data is available for April-June. NA=Not Available. #Only production volume of CDM Model is reported by Maruti Suzuki India Limited.

| SIAM   |            |        |              |          |                |        |              |          |         |        |                      |         |
|--|------------|--------|--------------|----------|----------------|--------|--------------|----------|---------|--------|----------------------|---------|
| Sub-segment & Company wise Production, Domestic Sales & Exports Report for the month of August 2023 and Cumulative for April-August 2023                 |            |        |              |          |                |        |              |          |         |        |                      |         |
|  |            |        |              |          |                |        |              |          |         |        | Report IV            |         |
|  |            |        |              |          |                |        |              |          |         |        | (Number of Vehicles) |         |
| Category   | Production |        |              |          | Domestic Sales |        |              |          | Exports |        |                      |         |
|  | August     |        | April-August |          | August         |        | April-August |          | August  |        | April-August         |         |
| Segment/Subsegment   | 2022       | 2023   | 2022-23      | 2023-24  | 2022           | 2023   | 2022-23      | 2023-24  | 2022    | 2023   | 2022-23              | 2023-24 |
| Manufacturer   |            |        |              |          |                |        |              |          |         |        |                      |         |
| <b>B: Utility Vehicles (UVs)</b>   |            |        |              |          |                |        |              |          |         |        |                      |         |
| <b>B: Utility Vehicles/ Sports Utility Vehicles; 4x2 or 4x4 offroad capability; Generally ladder on frame; 2 box; 5 Seats or more but upto 10 Seats.</b> |            |        |              |          |                |        |              |          |         |        |                      |         |
| <b>UV1: Length &lt; 4000 mm &amp; Price &lt;20 Lakhs</b>   |            |        |              |          |                |        |              |          |         |        |                      |         |
| Honda Cars India Ltd (WR-V)  | 476        | -      | 2,951        | -        | 415            | -      | 2,722        | -        | 9       | -      | 195                  | 266     |
| Hyundai Motor India Ltd (Treta, Venue)   | 11,540     | 20,294 | 62,304       | 75,082   | 11,240         | 18,379 | 50,752       | 67,637   | 452     | 1,913  | 1,958                | 8,631   |
| Kia Motors India Pvt Ltd (Sorento)   | 10,331     | 7,362  | 60,845       | 55,330   | 7,838          | 4,120  | 35,271       | 24,082   | 2,715   | 3,874  | 14,071               | 20,637  |
| Mahindra & Mahindra Ltd (Bolero, Kuv 100, Thar, Xuv300)  | 18,731     | 21,682 | 80,681       | 99,922   | 16,361         | 20,213 | 81,854       | 87,373   | 1,684   | 2,712  | 2,619                | 2,772   |
| Maruti Suzuki India Ltd (DFM Model # Brezza, Fronx, Jaxx)  | 23,032     | 22,474 | 1,01,199     | 1,35,225 | 15,193         | 29,840 | 61,392       | 1,29,399 | 7,685   | 2,443  | 24,483               | 4,169   |
| Nissan Motor India Pvt Ltd (Magnite)   | 5,417      | 4,377  | 19,867       | 17,985   | 3,194          | 2,258  | 13,924       | 12,737   | 957     | 594    | 2,743                | 2,033   |
| PCA Motors Pvt. Ltd (C3 ECO)   | 878        | 430    | 1,623        | 4,775    | 820            | 621    | 1,435        | 3,686    | -       | 195    | -                    | 1,078   |
| Rangoo (New Pvt Ltd (Kiger, Torque))   | 6,334      | 3,670  | 35,555       | 18,124   | 6,309          | 2,750  | 26,997       | 16,767   | 1,167   | 773    | 7,082                | 3,974   |
| Tata Motors Ltd (Nexon, Punch)   | NA         | NA     | 73,107       | 79,519   | NA             | NA     | 73,677       | 76,533   | NA      | NA     | 145                  | 272     |
| Toyota Kirloskar Motor Pvt Ltd (Urban Cruiser)   | -          | -      | -            | -        | 5,131          | -      | 21,928       | -        | -       | -      | -                    | -       |
| <b>Total UV1</b>   | 77,639     | 90,726 | 4,18,142     | 4,85,555 | 63,505         | 78,690 | 3,69,309     | 4,36,845 | 13,779  | 10,059 | 54,112               | 41,802  |
| <b>UV2: Length 4000 to 4400 mm &amp; Price &lt;20 Lakhs</b>  |            |        |              |          |                |        |              |          |         |        |                      |         |
| <b>Force Motors Ltd (Corners)</b>  |            |        |              |          |                |        |              |          |         |        |                      |         |
| Force Motors Ltd (Corners)   | 68         | -      | 399          | 10       | 62             | -      | 348          | -        | -       | -      | -                    | 2       |
| <b>Honda Cars India Ltd (Elevate)</b>  |            |        |              |          |                |        |              |          |         |        |                      |         |
| Honda Cars India Ltd (Elevate)   | -          | 3,727  | -            | 3,147    | -              | 2,822  | -            | 2,522    | -       | 4      | -                    | 6       |
| Hyundai Motor India Ltd (Creta)  | 14,533     | 13,577 | 73,845       | 72,692   | 12,577         | 15,832 | 62,676       | 70,976   | 2,404   | 495    | 11,141               | 2,868   |
| Kia Motors India Pvt Ltd (Seltos)  | 13,575     | 11,277 | 60,847       | 49,328   | 8,662          | 10,698 | 39,040       | 35,294   | 1,827   | 600    | 23,529               | 9,899   |
| Maruti Suzuki India Ltd (DEVM Model # Ertiga, Grand Vitara)  | 9,315      | 14,269 | 61,623       | 60,438   | 9,314          | 24,103 | 61,622       | 66,777   | 1,347   | 3,777  | 2,015                | 17,381  |
| MG Motor India Pvt Ltd (Astor)   | 1,475      | 565    | 7,987        | 2,987    | 1,324          | 814    | 6,557        | 3,955    | -       | -      | -                    | -       |
| Nissan Motor India Pvt Ltd (Kicks)   | 1,811      | -      | 1,188        | -        | 89             | -      | 772          | -        | -       | -      | -                    | -       |
| Skoda Auto India Pvt Ltd (Kushaq)  | 1,232      | 2,729  | 11,057       | 11,004   | 1,270          | 2,400  | 11,142       | 10,793   | -       | 66     | -                    | 717     |
| Toyota Kirloskar Motor Pvt Ltd (Model # Innova Crysta, Innova Hycross)   | 614        | 19,632 | 814          | 69,813   | 4,713          | 4,713  | 18,747       | 18,747   | -       | 935    | -                    | 8,840   |
| Volkswagen India Pvt Ltd (T. Cross)  | 1,452      | 4,482  | 6,503        | 15,938   | 1,017          | 1,543  | 7,651        | 8,534    | 255     | 3,027  | 588                  | 8,403   |
| <b>Total UV2</b>   | 43,505     | 68,841 | 2,24,919     | 2,90,947 | 34,801         | 60,884 | 1,89,686     | 2,47,432 | 6,558   | 9,737  | 35,172               | 43,092  |
| <b>UV3: Length &gt;4700 mm &amp; Price &lt;20 Lakhs</b>  |            |        |              |          |                |        |              |          |         |        |                      |         |
| <b>Force Motors Ltd (Trax)</b>   |            |        |              |          |                |        |              |          |         |        |                      |         |
| Force Motors Ltd (Trax)  | -          | 140    | -            | 532      | -              | 119    | -            | 532      | -       | -      | -                    | -       |
| Hyundai Motor India Pvt Ltd (Hi Lander, V-Cross)   | 1,511      | -      | 1,410        | 58       | 40             | 22     | 232          | 146      | -       | -      | 194                  | -       |
| Toyota Kirloskar Motor Pvt Ltd (Innova Crysta, Innova Hycross)   | 6,391      | 8,922  | 29,612       | 59,289   | 6,036          | 8,629  | 28,879       | 33,574   | -       | -      | -                    | -       |

\* Only cumulative data is available for April-June. NA=Not Available. #Only production volume of CDM Model is reported by Maruti Suzuki India Limited.



# Statistics

| SIAM   |                    |          |           |              |                |          |              |           |         |        |                      |          |
|--|--------------------|----------|-----------|--------------|----------------|----------|--------------|-----------|---------|--------|----------------------|----------|
| Sub-segment & Company wise Production, Domestic Sales & Exports Report for the month of August 2023 and Cumulative for April-August 2023 |                    |          |           |              |                |          |              |           |         |        |                      |          |
|  |                    |          |           |              |                |          |              |           |         |        | Report IV            |          |
|  |                    |          |           |              |                |          |              |           |         |        | (Number of Vehicles) |          |
| Category   | Production         |          |           |              | Domestic Sales |          |              |           | Exports |        |                      |          |
|  | Segment/Subsegment |          | August    | April-August | August         |          | April-August |           | August  |        | April-August         |          |
| Manufacturer   | 2022               | 2023     | 2022-23   | 2023-24      | 2022           | 2023     | 2022-23      | 2023-24   | 2022    | 2023   | 2022-23              | 2023-24  |
| <b>Total UV3</b>   | 6,542              | 9,063    | 30,918    | 39,873       | 6,076          | 8,806    | 29,051       | 39,222    | -       | -      | 194                  | -        |
| <b>UV4 : Price between Rs. 20 to 30 Lakh</b>   |                    |          |           |              |                |          |              |           |         |        |                      |          |
| Force India Automobiles Pvt Ltd (Jeep Compass)   | 1,755              | 572      | 6,196     | 3,413        | 921            | 172      | 4,327        | 1,230     | 394     | 320    | 1,892                | 1,241    |
| Force Motors Ltd (Creta)   | -                  | 2        | -         | 2            | -              | -        | -            | -         | -       | -      | -                    | -        |
| Hyundai Motor India Ltd (Kona Tucson)  | 495                | 355      | 1,074     | 2,566        | 445            | 327      | 1,005        | 1,977     | -       | -      | -                    | -        |
| Kia Motors India Pvt Ltd (Carnival)  | 310                | -        | 1,480     | -            | 274            | -        | 1,441        | -         | -       | -      | -                    | -        |
| Maruti Suzuki India Ltd (Alto)   | -                  | -        | 386       | -            | -              | -        | 327          | -         | -       | -      | -                    | -        |
| Maruti Suzuki India Ltd (Invicto)  | -                  | -        | -         | -            | -              | 509      | -            | 1,545     | -       | -      | -                    | -        |
| MG Motor India Pvt Ltd (SUV)   | 352                | NA       | 1,537     | 1,871        | 397            | NA       | 1,648        | 1,747     | -       | -      | -                    | -        |
| PCA Motors Pvt. Ltd (Crossover)  | 62                 | -        | 162       | 36           | 29             | -        | 142          | 40        | -       | -      | -                    | -        |
| Toyota Kirloskar Motor Pvt Ltd (Model Manufacturing)   | -                  | 705      | -         | 1,727        | -              | -        | -            | -         | -       | -      | -                    | -        |
| <b>Total UV4</b>   | 2,431              | 1,684    | 10,775    | 8,634        | 2,106          | 1,092    | 8,914        | 6,540     | 394     | 322    | 1,892                | 1,241    |
| <b>UV5 : Price &gt;Rs. 30 Lakh</b>   |                    |          |           |              |                |          |              |           |         |        |                      |          |
| Force India Automobiles Pvt Ltd (Jeep Meridian)  | 481                | 245      | 2,256     | 2,101        | 400            | 127      | 1,971        | 1,280     | 41      | 241    | 41                   | 1,091    |
| Hyundai Motor India Ltd (SUV)  | -                  | 200      | -         | 620          | -              | 130      | -            | 734       | -       | -      | -                    | -        |
| Jeep Motors India Pvt Ltd (Mux)  | 4                  | -        | 30        | 31           | 9              | 8        | 18           | 20        | -       | -      | -                    | -        |
| Kia Motors India Pvt Ltd (EV5)   | -                  | -        | 15        | -            | -              | 42       | 16           | 336       | -       | -      | -                    | -        |
| MG Motor India Pvt Ltd (SUV)   | 220                | 500      | 835       | 1,689        | 185            | 240      | 722          | 1,252     | -       | -      | -                    | -        |
| Skoda Auto India Pvt Ltd (Kodak)   | 161                | 411      | 511       | 2,113        | 191            | 211      | 534          | 591       | -       | -      | -                    | -        |
| Toyota Kirloskar Motor Pvt Ltd (Fortuner, Hilux, Land Cruiser)   | 2,848              | 3,062    | 12,400    | 15,451       | 2,090          | 2,332    | 12,279       | 14,769    | -       | 2      | 45                   | 2        |
| Volkswagen India Pvt Ltd (Trigo)   | 77                 | 254      | 479       | 1,114        | 154            | 91       | 573          | 555       | -       | -      | -                    | -        |
| <b>Total UV5</b>   | 3,894              | 4,544    | 16,632    | 23,125       | 3,594          | 3,811    | 15,997       | 19,847    | 41      | 243    | 86                   | 1,093    |
| <b>Total Utility Vehicles (UVs)</b>  | 1,61,257           | 2,06,366 | 8,43,905  | 10,20,880    | 1,35,497       | 1,81,825 | 7,37,157     | 9,09,053  | 24,280  | 23,252 | 98,095               | 98,895   |
| <b>Vans</b>  |                    |          |           |              |                |          |              |           |         |        |                      |          |
| <b>C : Vans : Generally 1 or 1.5 box; seats upto 5 to 10</b>   |                    |          |           |              |                |          |              |           |         |        |                      |          |
| <b>V1 : Hard tops mainly used for personal transport. Price upto Rs. 10 Lakh</b>   |                    |          |           |              |                |          |              |           |         |        |                      |          |
| Maruti Suzuki India Ltd (Maxi)   | 378                | 35       | 1,444     | 160          | 234            | 1,159    | -            | -         | -       | 38     | -                    | 140      |
| Maruti Suzuki India Ltd (Mini)   | 11,356             | 11,511   | 57,069    | 59,758       | 11,999         | 11,859   | 56,873       | 56,572    | 9       | 885    | 158                  | 3,210    |
| Tata Motors Ltd (Maxi Express)   | NA                 | NA       | 1,461     | -            | NA             | NA       | 1,875        | 2,521     | NA      | NA     | -                    | -        |
| <b>Total V1</b>  | 12,132             | 11,846   | 59,974    | 59,918       | 12,233         | 11,859   | 59,826       | 59,106    | 9       | 704    | 158                  | 3,350    |
| <b>V2 : Soft tops mainly used as Maxi Cabs. Price upto Rs. 10 Lakh</b>   |                    |          |           |              |                |          |              |           |         |        |                      |          |
| Maruti Suzuki India Ltd (Supro)  | 1                  | -        | 163       | -            | 3              | -        | 81           | 10        | -       | -      | -                    | -        |
| Tata Motors Ltd (Maxi Cab)   | NA                 | NA       | 50        | 44           | NA             | NA       | -            | 429       | NA      | NA     | 20                   | 31       |
| <b>Total V2</b>  | 1                  | -        | 203       | 44           | 3              | -        | 81           | 438       | -       | -      | 20                   | 31       |
| <b>Total Vans</b>  | 12,133             | 11,846   | 60,177    | 59,962       | 12,236         | 11,859   | 59,907       | 59,544    | 9       | 704    | 178                  | 3,381    |
| <b>Total Passenger Vehicles (PVs)</b>  | 3,34,089           | 3,74,019 | 17,55,685 | 19,04,305    | 2,81,210       | 3,13,715 | 14,95,570    | 16,12,210 | 54,688  | 63,883 | 2,68,722             | 2,75,633 |

\* Only cumulative data is available for April-June. NA - Not Available

| SIAM   |                    |        |          |              |                |        |              |          |         |        |                      |          |
|--|--------------------|--------|----------|--------------|----------------|--------|--------------|----------|---------|--------|----------------------|----------|
| Sub-segment & Company wise Production, Domestic Sales & Exports Report for the month of August 2023 and Cumulative for April-August 2023 |                    |        |          |              |                |        |              |          |         |        |                      |          |
|  |                    |        |          |              |                |        |              |          |         |        | Report IV            |          |
|  |                    |        |          |              |                |        |              |          |         |        | (Number of Vehicles) |          |
| Category   | Production         |        |          |              | Domestic Sales |        |              |          | Exports |        |                      |          |
|  | Segment/Subsegment |        | August   | April-August | August         |        | April-August |          | August  |        | April-August         |          |
| Manufacturer   | 2022               | 2023   | 2022-23  | 2023-24      | 2022           | 2023   | 2022-23      | 2023-24  | 2022    | 2023   | 2022-23              | 2023-24  |
| <b>Three Wheelers</b>  |                    |        |          |              |                |        |              |          |         |        |                      |          |
| <b>A: Passenger Carriers</b>   |                    |        |          |              |                |        |              |          |         |        |                      |          |
| <b>A1: Passenger Carrier</b>   |                    |        |          |              |                |        |              |          |         |        |                      |          |
| <b>A1: No. of seats including driver not exceeding 4 &amp; Max. Mass not exceeding 1 tonne</b>   |                    |        |          |              |                |        |              |          |         |        |                      |          |
| Atul Auto Ltd (Atul Gemini Atul Rik Atul Rik 1.3 L Atul Rik)   | 657                | 420    | 2,439    | 1,777        | 374            | 257    | 1,389        | 1,085    | 292     | 287    | 1,175                | 756      |
| Bajaj Auto Ltd (Maxima RE)   | 12,777             | 99,082 | 1,14,365 | 2,26,596     | 20,203         | 39,907 | 66,847       | 1,60,675 | 22,901  | 12,069 | 81,301               | 65,939   |
| Continental Engines Pvt. Ltd (Baxi EVF PRO Baxi Exp)   | 241                | 95     | 922      | 509          | 237            | 77     | 937          | 489      | -       | -      | -                    | -        |
| Maruti Suzuki India Ltd (Auto Rick)  | 1,777              | 3,584  | 7,053    | 14,520       | 1,767          | 2,484  | 7,074        | 14,393   | 12      | 24     | 90                   | 61       |
| Piaggio Vehicles Pvt Ltd (Ace Auto, Ace City)  | 5,399              | 7,237  | 50,290   | 28,942       | 4,568          | 6,548  | 18,415       | 25,115   | 3,775   | 768    | 11,062               | 4,137    |
| TVS Motor Company Ltd (TVS King AS)  | 17,100             | 15,126 | 76,402   | 61,797       | 1,347          | 5,616  | 5,421        | 7,446    | 16,028  | 12,024 | 72,999               | 54,590   |
| <b>Total A1</b>  | 70,668             | 81,553 | 2,71,484 | 3,34,839     | 28,820         | 61,739 | 99,684       | 2,09,315 | 43,624  | 26,168 | 1,78,506             | 1,23,358 |
| <b>A2: No. of seats including driver exceeding 4 but not exceeding 7 &amp; Max. Mass not exceeding 1.5 tonnes</b>                        |                    |        |          |              |                |        |              |          |         |        |                      |          |
| Atul Auto Ltd (Atul Gemini Baxi)   | 573                | 812    | 2,633    | 1,569        | 485            | 577    | 2,311        | 1,404    | -       | -      | 30                   | 56       |
| Force Motors Ltd (Minidor)   | 278                | 394    | 1,072    | 1,572        | -              | -      | -            | -        | 408     | 644    | 1,106                | 1,648    |
| <b>Total A2</b>  | 851                | 1,006  | 3,602    | 3,161        | 485            | 577    | 2,311        | 1,404    | 408     | 644    | 1,136                | 1,904    |
| <b>Total A</b>   | 71,509             | 82,559 | 2,75,086 | 3,38,000     | 29,105         | 62,316 | 1,02,195     | 2,10,719 | 43,930  | 25,812 | 1,77,642             | 1,25,260 |
| <b>Total Passenger Carriers</b>  | 71,509             | 82,559 | 2,75,086 | 3,38,000     | 29,105         | 62,316 | 1,02,195     | 2,10,719 | 43,930  | 25,812 | 1,77,642             | 1,25,260 |
| <b>E-Rickshaw</b>  |                    |        |          |              |                |        |              |          |         |        |                      |          |
| Atul Auto Ltd (Atul Elite)   | 202                | 297    | 665      | 2,105        | 263            | 455    | 934          | 2,093    | -       | -      | -                    | -        |
| Continental Engines Pvt. Ltd (Baxi E-Rick)   | 52                 | 476    | 180      | 1,797        | 57             | 307    | 219          | 1,497    | -       | -      | -                    | -        |
| Maruti Suzuki India Ltd (Auto Rick)  | 1,899              | 2,337  | 6,179    | 8,242        | 1,757          | 2,567  | 6,525        | 9,851    | -       | -      | -                    | -        |
| <b>Total E-Rickshaw</b>  | 2,233              | 3,110  | 7,214    | 11,949       | 2,095          | 3,116  | 7,478        | 13,421   | -       | -      | -                    | -        |
| <b>B: Goods Carrier</b>  |                    |        |          |              |                |        |              |          |         |        |                      |          |
| <b>B1: Max mass not exceeding 1 tonnes</b>   |                    |        |          |              |                |        |              |          |         |        |                      |          |
| Atul Auto Ltd (Atul Gemini Atul Gemini Atul Gemini Atul)   | 325                | 1,169  | 2,609    | 2,077        | 429            | 955    | 2,655        | 1,773    | -       | 12     | 89                   | 30       |
| Bajaj Auto Ltd (Maxima)  | 2,470              | 4,465  | 13,189   | 20,672       | 2,392          | 4,233  | 13,042       | 19,281   | -       | 104    | 224                  | 472      |
| Continental Engines Pvt. Ltd (Baxi Cargo, Baxi Cargo S)  | 330                | 30     | 1,715    | 61           | 245            | 47     | 1,505        | 115      | -       | -      | -                    | -        |
| Maruti Suzuki India Ltd (Auto Rick)  | 1,359              | 2,15   | 5,925    | 6,595        | 1,250          | 1,102  | 5,805        | 6,368    | 83      | -      | 102                  | 10       |
| Piaggio Vehicles Pvt Ltd (Ace King)  | 3,544              | 2,495  | 12,748   | 12,762       | 2,449          | 2,743  | 11,939       | 11,999   | 82      | 42     | 691                  | 317      |
| TVS Motor Company Ltd (TVS King Cargo)   | 91                 | 37     | 912      | 1,111        | 4              | 28     | 150          | 191      | 71      | -      | 76                   | 9        |
| <b>Total B1</b>  | 7,116              | 8,811  | 37,329   | 42,332       | 7,007          | 9,132  | 35,020       | 39,698   | 236     | 158    | 1,842                | 842      |
| <b>Total Goods Carrier</b>   | 7,116              | 8,811  | 37,329   | 42,332       | 7,007          | 9,132  | 35,020       | 39,698   | 236     | 158    | 1,842                | 842      |
| <b>E-Cart</b>  |                    |        |          |              |                |        |              |          |         |        |                      |          |
| Atul Auto Ltd (Atul Elite Cargo)   | 77                 | 66     | 580      | 675          | 57             | 54     | 559          | 823      | -       | -      | -                    | -        |
| Continental Engines Pvt. Ltd (Baxi E-Cart)   | 10                 | 29     | 15       | 56           | -              | 14     | 12           | 59       | -       | -      | -                    | -        |
| Maruti Suzuki India Ltd (Auto Rick)  | 91                 | 119    | 722      | 967          | 65             | 107    | 721          | 972      | -       | -      | -                    | -        |
| <b>Total E-Cart</b>  | 178                | 210    | 1,300    | 1,668        | 162            | 199    | 1,295        | 1,434    | -       | -      | -                    | -        |
| <b>Total Three Wheelers</b>  | 81,038             | 94,790 | 3,20,929 | 3,93,449     | 38,389         | 64,783 | 1,45,988     | 2,86,272 | 44,168  | 26,970 | 1,79,484             | 1,26,102 |





| Sub-segment & Company wise Production, Domestic Sales & Exports Report for the month of August 2023 and Cumulative for April-August 2023   |   |   |  |  |   |  |   |  |                               |                                |                                    |                                     |
|--|---|---|--|--|---|--|---|--|-------------------------------|--------------------------------|------------------------------------|-------------------------------------|
|  |   |   |  |  |   |  |   |  |                               |                                | Report IV<br>(Number of Vehicles)  |                                     |
| Category<br>Segment/Subsegment<br>Manufacturer   | Production                              |   |  |  | Domestic Sales                            |  |   |  | Exports                       |                                |                                    |                                     |
|  | August<br>2022                          | 2023                                    | April-August<br>2022-23                    | 2023-24                                      | August<br>2022                            | 2023                                       | April-August<br>2022-23                       | 2023-24                                      | August<br>2022                | 2023                           | April-August<br>2022-23            | 2023-24                             |
| <b>Two Wheelers</b>  |   |   |  |  |   |  |   |  |                               |                                |                                    |                                     |
| <b>A : Scooter/ Scooterette : Wheel size is less than or equal to 12"</b>  |   |   |  |  |   |  |   |  |                               |                                |                                    |                                     |
| <b>A1 : Engine capacity less than or equal to 75 CC</b>  |   |   |  |  |   |  |   |  |                               |                                |                                    |                                     |
| Piaggio Vehicles Pvt. Ltd (SXR 50)   | 511                                     | 557                                     | 3,136                                      | 2,774  | -   | -  | -   | -  | 528                           | 550                            | 3,136                              | 2,774                               |
| <b>Total A1</b>  | 511                                     | 557                                     | 3,136                                      | 2,774  | -   | -  | -   | -  | 528                           | 550                            | 3,136                              | 2,774                               |
| <b>A2 : Engine capacity &gt;75 CC but less than or equal to 90 CC</b>  |   |   |  |  |   |  |   |  |                               |                                |                                    |                                     |
| TVS Motor Company Ltd. (Pap +)   | 5,747                                   | -                                       | 38,082                                     | -  | 8,516                                     | -  | 37,429  | 4,130  | -                             | -                              | -                                  | -                                   |
| <b>Total A2</b>  | 8,747                                   | -                                       | 38,082                                     | -  | 8,516                                     | -  | 37,429  | 5,132  | -                             | -                              | -                                  | -                                   |
| <b>A3 : Engine capacity &gt;90 CC but less than or equal to 125 CC</b>   |   |   |  |  |   |  |   |  |                               |                                |                                    |                                     |
| Hero MotoCorp Ltd. (Hero Destrin 125, Maestro, Pleasure, Passion, Multigrade & Scooter India Pvt. Ltd. (Aviator, Aviator X, Yamaha Motor Pvt. Ltd. (Asha, Fascino, Hayabusa), Piaggio Vehicles Pvt. Ltd. (Aprilia, Vespa), Suzuki Motorcycle India Pvt. Ltd. (Access, Aerox, Burglar), TVS Motor Company Ltd. (Jupiter, Ntorq, Wego, Zest) | 29,250<br>2,79,315<br>21,168<br>4,355   | 30,607<br>2,57,147<br>37,893<br>2,652   | 1,39,316<br>11,88,730<br>92,394<br>20,520  | 1,35,779<br>10,83,225<br>1,28,593<br>13,353  | 21,725<br>2,50,557<br>19,274<br>2,937     | 31,779<br>2,58,870<br>25,420<br>2,984      | 1,36,010<br>10,82,943<br>76,799<br>17,507     | 1,39,286<br>10,10,442<br>1,10,432<br>12,282  | 684<br>25,168<br>4,739<br>800 | 3,704<br>17,250<br>3,253<br>35 | 2,690<br>1,34,844<br>17,323<br>614 | 13,272<br>78,763<br>14,424<br>1,100 |
| <b>Total A3</b>  | 59,797<br>11,625<br>5,12,469            | 67,759<br>1,24,005<br>5,52,704          | 3,08,267<br>5,00,790<br>22,24,021          | 3,54,553<br>4,55,235<br>22,93,463            | 61,356<br>1,02,432<br>4,67,624            | 79,520<br>1,06,686<br>5,03,379             | 2,82,940<br>1,66,383<br>20,42,942             | 5,48,491<br>4,82,605<br>21,01,518            | 5,821<br>17,812<br>44,676     | 6,857<br>17,812<br>43,066      | 28,217<br>50,329<br>1,86,684       | 50,566<br>50,329<br>2,09,572        |
| <b>A4 : Engine capacity &gt;125 CC but less than or equal to 150 CC</b>  |   |   |  |  |   |  |   |  |                               |                                |                                    |                                     |
| Piaggio Vehicles Pvt. Ltd. (Aprilia, Vespa)  | 629                                     | 418                                     | 3,778                                      | 3,370  | 206                                       | 264  | 1,082   | 1,113  | 336                           | 36                             | 2,747                              | 2,132                               |
| <b>Total A4</b>  | 629                                     | 418                                     | 3,778                                      | 3,370  | 206                                       | 264  | 1,082   | 1,113  | 336                           | 36                             | 2,747                              | 2,132                               |
| <b>A5 : Engine capacity &gt;150 CC but less than or equal to 200 CC</b>  |   |   |  |  |   |  |   |  |                               |                                |                                    |                                     |
| Yamaha Motor Pvt. Ltd. (Aerox), Piaggio Vehicles Pvt. Ltd. (Aprilia)   | -<br>709                                | 1,012<br>442                            | -<br>2,403                                 | 2,562<br>3,756                               | -<br>471                                  | 1,782<br>317                               | -<br>2,228                                    | 2,067<br>1,794                               | -                             | -                              | 148                                | 199                                 |
| <b>Total A5</b>  | -<br>709                                | 1,012<br>442                            | -<br>2,403                                 | 2,562<br>3,756                               | -<br>471                                  | 1,782<br>317                               | -<br>2,228                                    | 2,067<br>1,794                               | -                             | -                              | 148                                | 199                                 |
| <b>AE1: Upto 250 W Electric</b>  |   |   |  |  |   |  |   |  |                               |                                |                                    |                                     |
| Chetak Technology Ltd. (Yulu Ver 3.0), Okras Autotech Pvt. Ltd. (Duo, Dual-100, Lite R-30)   | 1,693                                   | 877                                     | 3,782                                      | 3,745  | 1,670                                     | 680  | 7,059   | 1,026  | 23                            | -                              | 23                                 | -                                   |
| <b>Total AE1</b>   | 1,693                                   | 877                                     | 3,782                                      | 3,745  | 1,670                                     | 680  | 7,059   | 1,026  | 23                            | -                              | 23                                 | -                                   |
| <b>AE2: More than 250 W Electric</b>   |   |   |  |  |   |  |   |  |                               |                                |                                    |                                     |
| Ather Energy Pvt. Ltd. (Ather 450X, 450), Bajaj Auto Ltd. (Cesca), Hero MotoCorp Ltd. (Vida), Okras Autotech Pvt. Ltd. (Praira, Okh 90, Praira Pro), TVS Motor Company Ltd. (TVS iQube Electric)   | 5,811<br>3,108<br>20<br>12,055<br>6,012 | 8,257<br>6,636<br>81<br>3,555<br>27,023 | 19,921<br>12,539<br>60<br>52,507<br>21,052 | 42,150<br>37,663<br>4,432<br>1,555<br>50,550 | 6,447<br>2,757<br>1,000<br>2,039<br>4,478 | 8,243<br>3,537<br>1,000<br>1,708<br>23,887 | 19,708<br>12,070<br>4,640<br>52,363<br>19,448 | 12,923<br>33,084<br>4,640<br>5,076<br>78,795 | -                             | -                              | 10                                 | -                                   |
| <b>Total AE2</b>   | 27,802                                  | 44,074                                  | 1,06,078                                   | 1,84,481                                     | 25,859                                    | 42,898                                     | 1,03,568                                      | 1,61,798                                     | 15                            | -                              | 55                                 | 78                                  |
| <b>Total Scooter/ Scooterette</b>  | 5,52,950                                | 6,91,793                                | 23,81,290                                  | 24,73,088                                    | 5,04,146                                  | 5,49,290                                   | 21,81,208                                     | 22,76,285                                    | 45,578                        | 43,808                         | 1,92,844                           | 2,14,527                            |

| Sub-segment & Company wise Production, Domestic Sales & Exports Report for the month of August 2023 and Cumulative for April-August 2023   |   |                                       |   |   |                                |                              |                                  |                                   |                          |                          |  |  |
|--|---|---------------------------------------|---|---|--------------------------------|------------------------------|----------------------------------|-----------------------------------|--------------------------|--------------------------|--|--|
|  |   |                                       |   |   |                                |                              |                                  |                                   |                          |                          | Report IV<br>(Number of Vehicles)      |  |
| Category<br>Segment/Subsegment<br>Manufacturer   | Production                              |                                       |   |   | Domestic Sales                 |                              |                                  |                                   | Exports                  |                          |  |  |
|  | August<br>2022                          | 2023                                  | April-August<br>2022-23                     | 2023-24                                     | August<br>2022                 | 2023                         | April-August<br>2022-23          | 2023-24                           | August<br>2022           | 2023                     | April-August<br>2022-23                | 2023-24                                |
| <b>B : Motorcycles/Skip-Through: Big wheel size - more than 12"</b>  |   |                                       |   |   |                                |                              |                                  |                                   |                          |                          |  |  |
| <b>B1 : Engine capacity &lt;75 CC</b>  |   |                                       |   |   |                                |                              |                                  |                                   |                          |                          |  |  |
| Indra Kawasaki Motors Pvt. Ltd. (KX65)   | -                                       | -                                     | -   | -   | -                              | -                            | -                                | -                                 | 2                        | -                        | -                                      | -                                      |
| <b>Total B1</b>  | -                                       | -                                     | -   | -   | -                              | -                            | -                                | -                                 | 2                        | -                        | -                                      | -                                      |
| <b>B2 : Engine Capacity &gt;75 CC but less than equal to 110 CC</b>  |   |                                       |   |   |                                |                              |                                  |                                   |                          |                          |  |  |
| Bajaj Auto Ltd. (Baker, Discover, Pulsar), Hero MotoCorp Ltd. (H-De, Xe, Passion, Splendor), Honda Motorcycle & Scooter India Pvt. Ltd. (Dream, Livo), Inda Yamaha Motor Pvt. Ltd. (Duo, Saluto, RX), TVS Motor Company Ltd. (Racee, Scor, Star City)  | 1,47,042<br>3,74,538<br>26,229<br>2,536 | 99,330<br>3,77,110<br>50,265<br>2,875 | 6,51,269<br>17,69,535<br>1,71,954<br>15,216 | 4,30,555<br>17,33,340<br>1,33,737<br>16,730 | 1,15,034<br>3,68,237<br>20,527 | 47,267<br>3,67,823<br>42,815 | 3,83,134<br>17,49,998<br>90,159  | 2,24,101<br>17,33,419<br>1,17,777 | 43,159<br>2,658<br>2,266 | 54,436<br>9,146<br>2,736 | 3,67,777<br>42,010<br>11,378<br>15,838 | 3,89,738<br>25,048<br>11,378<br>14,034 |
| <b>Total B2</b>  | 5,91,834                                | 5,82,118                              | 27,97,319                                   | 25,73,965                                   | 5,20,878                       | 4,83,655                     | 22,38,859                        | 22,09,796                         | 74,993                   | 83,631                   | 5,98,901                               | 4,15,909                               |
| <b>B3 : Engine Capacity &gt;110 CC but less than equal to 125 CC</b>   |   |                                       |   |   |                                |                              |                                  |                                   |                          |                          |  |  |
| Bajaj Auto Ltd. (Baker, Discover, Husavarna, KTM, Plasma), Hero MotoCorp Ltd. (Centaur, Splendor), Honda Motorcycle & Scooter India Pvt. Ltd. (CB Shine, Shine), Inda Kawasaki Motors Pvt. Ltd. (KX112)  | 52,174<br>57,333<br>1,28,167            | 57,831<br>64,952<br>1,17,361          | 4,45,736<br>2,56,854<br>6,04,305            | 4,88,747<br>2,67,063<br>4,22,730            | 62,463<br>55,732<br>1,20,139   | 55,085<br>64,841<br>1,14,142 | 2,75,053<br>2,85,325<br>5,65,027 | 5,47,715<br>2,95,042<br>4,70,133  | 29,767<br>2,748<br>3,474 | 21,157<br>1,193<br>2,150 | 1,74,275<br>14,580<br>13,001           | 1,07,028<br>5,790<br>6,113             |
| <b>Total B3</b>  | 3,35,781                                | 3,46,663                              | 16,41,484                                   | 16,03,138                                   | 2,58,368                       | 2,76,398                     | 11,97,133                        | 12,63,406                         | 79,747                   | 61,872                   | 4,46,674                               | 3,01,760                               |
| <b>B4 : Engine Capacity &gt;125 CC but less than equal to 150 CC</b>   |   |                                       |   |   |                                |                              |                                  |                                   |                          |                          |  |  |
| Bajaj Auto Ltd. (Baker, Discover Pulsar), Hero MotoCorp Ltd. (Hunk), Honda Motorcycle & Scooter India Pvt. Ltd. (CB Unicorn), Inda Yamaha Motor Pvt. Ltd. (FZ, SZ)   | 52,446<br>2,443<br>20,137               | 37,612<br>3,830<br>20,569             | 2,25,860<br>17,197<br>1,51,577              | 1,61,166<br>15,702<br>1,10,052              | 58,335<br>17,111               | 65,636<br>17,111             | 13,241<br>69,398                 | 13,241<br>86,058                  | 10,028<br>15,742         | 1,79,515<br>9,332        | 38,586<br>54,105                       | 2,27,366<br>32,072                     |
| <b>Total B4</b>  | 88,026                                  | 56,231                                | 3,94,628                                    | 2,82,930                                    | 47,804                         | 30,352                       | 1,74,874                         | 1,72,065                          | 41,183                   | 29,471                   | 2,07,546                               | 1,13,349                               |
| <b>B5 : Engine Capacity &gt;150 CC but less than equal to 200 CC</b>   |   |                                       |   |   |                                |                              |                                  |                                   |                          |                          |  |  |
| Bajaj Auto Ltd. (Avenger, Husavarna, KTM Pulsar), Hero MotoCorp Ltd. (Xiaobai 200, Xtreme), Honda Motorcycle & Scooter India Pvt. Ltd. (CB 200X, CB), Inda Kawasaki Motors Pvt. Ltd. (Ninja), Inda Yamaha Motor Pvt. Ltd. (MT-15, R15), Suzuki Motorcycle India Pvt. Ltd. (Baker, Intruder), TVS Motor Company Ltd. (Apache) | 30,520<br>6,887<br>25,442               | 43,427<br>9,686<br>39,242             | 1,51,254<br>47,579<br>58,285                | 2,23,210<br>30,453<br>1,22,444              | 19,969<br>5,565<br>27,434      | 27,061<br>7,763<br>33,915    | 93,047<br>27,559<br>83,179       | 1,09,592<br>1,7,959<br>1,00,729   | 14,550<br>1,032<br>6,372 | 21,293<br>2,045<br>3,756 | 93,232<br>9,896<br>33,799              | 95,721<br>8,462<br>17,938              |
| <b>Total B5</b>  | 1,56,541                                | 1,61,727                              | 6,04,598                                    | 7,19,407                                    | 1,15,773                       | 1,02,624                     | 3,74,400                         | 4,83,703                          | 39,948                   | 46,479                   | 2,30,169                               | 2,01,863                               |



# Statistics

| SILM   |                |               |                         |                 |                |               |                         |                 |                |               |                         |                      |
|--|----------------|---------------|-------------------------|-----------------|----------------|---------------|-------------------------|-----------------|----------------|---------------|-------------------------|----------------------|
| Sub-segment & Company wise Production, Domestic Sales & Exports Report for the month of August 2023 and Cumulative for April-August 2023 |                |               |                         |                 |                |               |                         |                 |                |               |                         |                      |
|  |                |               |                         |                 |                |               |                         |                 |                |               |                         | Report IV            |
|  |                |               |                         |                 |                |               |                         |                 |                |               |                         | (Number of Vehicles) |
| Category<br>Segment/Subsegment   | Production     |               |                         |                 | Domestic Sales |               |                         |                 | Exports        |               |                         |                      |
|  | August<br>2022 | 2023          | April-August<br>2022-23 | 2023-24         | August<br>2022 | 2023          | April-August<br>2022-23 | 2023-24         | August<br>2022 | 2023          | April-August<br>2022-23 | 2023-24              |
| <b>B6: Engine Capacity &gt;200 CC but less than equal to 250 CC</b>  |                |               |                         |                 |                |               |                         |                 |                |               |                         |                      |
| Bajaj Auto Ltd (Avenger,Domina, Husvarna,KTM,Hulk)   | 7,685          | 13,332        | 27,517                  | 64,702          | 3,443          | 6,439         | 10,045                  | 32,493          | 4,250          | 7,254         | 21,002                  | 32,368               |
| Ind.a Kawasaki Motors Pvt Ltd (KX 250)   | -              | -             | -                       | -               | -              | -             | -                       | -               | -              | -             | -                       | -                    |
| Ind.a Yamaha Motor Pvt Ltd (YZF25)   | 1,900          | 600           | 1,731                   | 3,455           | 845            | -             | 3,157                   | -               | 1,053          | 754           | 6,004                   | 2,790                |
| Suz. of Motorcycle Ind.a Pvt Ltd (Gixer 250, V-Stron 250)  | 2,101          | 4,117         | 1,003                   | 21,738          | 372            | 879           | 3,533                   | 3,338           | 573            | 4,204         | 7,754                   | 17,607               |
| TVS Motor Company Ltd (Ronin)  | -              | 2,886         | -                       | 8,021           | -              | 2,927         | -                       | 3,735           | -              | 115           | -                       | 110                  |
| <b>Total B6</b>  | <b>11,754</b>  | <b>20,744</b> | <b>50,251</b>           | <b>94,323</b>   | <b>4,700</b>   | <b>9,369</b>  | <b>16,842</b>           | <b>39,595</b>   | <b>6,679</b>   | <b>12,338</b> | <b>37,590</b>           | <b>52,979</b>        |
| <b>B7: Engine Capacity &gt;250 CC but less than equal to 350 CC</b>  |                |               |                         |                 |                |               |                         |                 |                |               |                         |                      |
| Honda Motorcycle & Scooter India Pvt Ltd (CB 300N, C)  | 4,336          | 6,373         | 21,726                  | 28,130          | 3,972          | 3,457         | 15,706                  | 19,181          | 1              | 1,271         | 9,122                   | 12,211               |
| Ind.a Kawasaki Motors Pvt Ltd (Ninja350)   | 140            | 101           | 812                     | 555             | 144            | 104           | 356                     | 351             | -              | -             | -                       | -                    |
| Mahindra Two Wheelers Ltd (Majra)  | -              | -             | 72                      | -               | 23             | -             | 53                      | -               | -              | -             | -                       | -                    |
| Royal-Enfield (Unit of Eicher Motors) (Bullet 500, Bullet)   | 55,871         | 78,761        | 2,35,152                | 3,61,774        | 5,8274         | 62,563        | 2,41,812                | 3,13,559        | 5,952          | 5,170         | 22,989                  | 32,282               |
| TVS Motor Company Ltd (RMW,RR,310)   | 2,600          | 3,034         | 17,935                  | 14,767          | 300            | 245           | 1,848                   | 1,524           | 1,477          | 1,074         | 6,790                   | 6,402                |
| <b>Total B7</b>  | <b>70,764</b>  | <b>87,239</b> | <b>3,30,498</b>         | <b>4,08,905</b> | <b>62,713</b>  | <b>67,889</b> | <b>2,69,936</b>         | <b>3,33,928</b> | <b>6,440</b>   | <b>8,086</b>  | <b>37,467</b>           | <b>42,896</b>        |
| <b>B8: Engine Capacity &gt;350 CC but less than equal to 500 CC</b>  |                |               |                         |                 |                |               |                         |                 |                |               |                         |                      |
| Bajaj Auto Ltd (Domina, Husvarna, KTM, Triumph)  | 8,930          | 6,252         | 35,938                  | 39,555          | 1,503          | 4,857         | 5,202                   | 12,460          | 6,000          | 3,252         | 34,008                  | 28,941               |
| Honda Motorcycle & Scooter India Pvt Ltd (CB 500)  | -              | -             | -                       | -               | -              | -             | -                       | -               | -              | -             | -                       | -                    |
| Ind.a Kawasaki Motors Pvt Ltd (KLR 600R, KX 600, Ninja)  | -              | -             | -                       | -               | 47             | 50            | 50                      | 142             | -              | -             | -                       | -                    |
| Royal-Enfield (Unit of Eicher Motors) (Imayam)   | 8,174          | 4,770         | 33,714                  | 21,679          | 3,290          | 3,856         | 17,625                  | 17,087          | 1,675          | 329           | 9,729                   | 3,256                |
| <b>Total B8</b>  | <b>13,007</b>  | <b>13,030</b> | <b>69,660</b>           | <b>58,278</b>   | <b>5,080</b>   | <b>8,773</b>  | <b>22,820</b>           | <b>30,469</b>   | <b>8,476</b>   | <b>3,581</b>  | <b>44,068</b>           | <b>30,297</b>        |
| <b>B9: Engine Capacity &gt;500 CC but less than equal to 800 CC</b>  |                |               |                         |                 |                |               |                         |                 |                |               |                         |                      |
| Honda Motorcycle & Scooter India Pvt Ltd (GRR 800F)  | 39             | -             | 65                      | -               | 33             | -             | 55                      | -               | -              | -             | -                       | -                    |
| Ind.a Kawasaki Motors Pvt Ltd (Ninja350 Versys 650, V)   | 39             | 60            | 214                     | 264             | 46             | 54            | 303                     | 170             | -              | -             | -                       | -                    |
| Piaggio Vehicles Pvt Ltd (Aprilia RS990)   | -              | -             | -                       | -               | -              | -             | -                       | -               | -              | -             | -                       | -                    |
| Royal-Enfield (Unit of Eicher Motors) (650 Twin Super)   | 3,239          | 4,701         | 15,885                  | 21,775          | 1,358          | 1,854         | 7,723                   | 11,180          | 1,563          | 2,721         | 13,515                  | 10,142               |
| Suz. of Motorcycle Ind.a Pvt Ltd (L 650XA)   | 7              | -             | 30                      | -               | 5              | -             | 39                      | -               | -              | -             | -                       | -                    |
| Triumph Motorcycles India Pvt Ltd (Street Triple Tiger)  | 76             | 168           | 212                     | 252             | 45             | 158           | 212                     | 262             | -              | -             | -                       | -                    |
| <b>Total B9</b>  | <b>3,369</b>   | <b>4,929</b>  | <b>16,206</b>           | <b>21,695</b>   | <b>1,517</b>   | <b>1,876</b>  | <b>8,356</b>            | <b>11,612</b>   | <b>1,583</b>   | <b>2,721</b>  | <b>13,515</b>           | <b>10,142</b>        |

| SILM   |                  |                  |                         |                    |                  |                  |                         |                  |                 |                 |                         |                      |
|--|------------------|------------------|-------------------------|--------------------|------------------|------------------|-------------------------|------------------|-----------------|-----------------|-------------------------|----------------------|
| Sub-segment & Company wise Production, Domestic Sales & Exports Report for the month of August 2023 and Cumulative for April-August 2023 |                  |                  |                         |                    |                  |                  |                         |                  |                 |                 |                         |                      |
|  |                  |                  |                         |                    |                  |                  |                         |                  |                 |                 |                         | Report IV            |
|  |                  |                  |                         |                    |                  |                  |                         |                  |                 |                 |                         | (Number of Vehicles) |
| Category<br>Segment/Subsegment   | Production       |                  |                         |                    | Domestic Sales   |                  |                         |                  | Exports         |                 |                         |                      |
|  | August<br>2022   | 2023             | April-August<br>2022-23 | 2023-24            | August<br>2022   | 2023             | April-August<br>2022-23 | 2023-24          | August<br>2022  | 2023            | April-August<br>2022-23 | 2023-24              |
| <b>B10: Engine Capacity &gt;800 CC but less than equal to 1000 CC</b>  |                  |                  |                         |                    |                  |                  |                         |                  |                 |                 |                         |                      |
| Hero MotoCorp Ltd (BF3 Iron)   | -                | -                | -                       | -                  | 2                | -                | 34                      | -                | -               | -               | -                       | -                    |
| Ind.a Kawasaki Motors Pvt Ltd (Ninja ZX-10R Z900, Z90)   | -                | -                | 40                      | -                  | 41               | 36               | 225                     | 364              | -               | -               | -                       | -                    |
| Piaggio Vehicles Pvt Ltd (Moto C, zzi)   | -                | -                | -                       | -                  | -                | -                | -                       | -                | -               | -               | -                       | -                    |
| Suz. of Motorcycle Ind.a Pvt. Ltd (Katana)   | 1                | -                | 30                      | -                  | 3                | -                | 70                      | -                | -               | -               | -                       | -                    |
| Triumph Motorcycles India Pvt Ltd (Bonev 1e 1100 Spa)  | 10               | -                | 54                      | 51                 | 22               | 6                | 55                      | 56               | -               | -               | -                       | -                    |
| <b>Total B10</b>   | <b>11</b>        | <b>-</b>         | <b>124</b>              | <b>51</b>          | <b>70</b>        | <b>42</b>        | <b>376</b>              | <b>450</b>       | <b>-</b>        | <b>-</b>        | <b>-</b>                | <b>-</b>             |
| <b>B11: Engine Capacity &gt;1000 CC but less than equal to 1600 CC</b>   |                  |                  |                         |                    |                  |                  |                         |                  |                 |                 |                         |                      |
| Hero MotoCorp Ltd (TXC X-Forty Edge, Nightster, Pan A)   | -                | -                | -                       | -                  | 12               | 4                | 78                      | 92               | -               | -               | -                       | -                    |
| Honda Motorcycle & Scooter Ind.a Pvt Ltd (Africa Twin)   | -                | -                | 40                      | -                  | -                | -                | 41                      | -                | -               | -               | -                       | -                    |
| Ind.a Kawasaki Motors Pvt Ltd (Ninja1000, Versys 1000)   | 9                | -                | 20                      | -                  | 5                | 5                | 49                      | 67               | -               | -               | -                       | -                    |
| Suz. of Motorcycle Ind.a Pvt. Ltd (Hyosung)  | 35               | -                | 127                     | 31                 | 34               | -                | 108                     | 62               | -               | -               | -                       | -                    |
| Triumph Motorcycles India Pvt Ltd (Bonev 1e Bobber, B)   | -                | -                | -                       | -                  | 19               | 6                | 21                      | 42               | -               | -               | -                       | -                    |
| <b>Total B11</b>   | <b>44</b>        | <b>-</b>         | <b>187</b>              | <b>31</b>          | <b>70</b>        | <b>15</b>        | <b>337</b>              | <b>226</b>       | <b>-</b>        | <b>-</b>        | <b>-</b>                | <b>-</b>             |
| <b>B12: Engine Capacity &gt;1600 CC</b>  |                  |                  |                         |                    |                  |                  |                         |                  |                 |                 |                         |                      |
| Hero MotoCorp Ltd (Fat Bob, Fat Boy 111, Hurricane Class)  | -                | -                | -                       | -                  | 17               | 17               | 55                      | 45               | -               | -               | -                       | -                    |
| Honda Motorcycle & Scooter Ind.a Pvt Ltd (GL 1800)   | 2                | -                | 8                       | -                  | -                | -                | 6                       | -                | -               | -               | -                       | -                    |
| Triumph Motorcycles India Pvt Ltd (Rocket III Rocket III)  | -                | -                | -                       | -                  | 6                | 2                | 77                      | 36               | -               | -               | -                       | -                    |
| <b>Total B12</b>   | <b>2</b>         | <b>-</b>         | <b>8</b>                | <b>-</b>           | <b>23</b>        | <b>18</b>        | <b>118</b>              | <b>71</b>        | <b>-</b>        | <b>-</b>        | <b>-</b>                | <b>-</b>             |
| <b>Total Motorcycle/Step-Throughs</b>  | <b>12,70,803</b> | <b>12,72,569</b> | <b>59,04,931</b>        | <b>57,51,386</b>   | <b>10,15,794</b> | <b>9,80,809</b>  | <b>42,92,050</b>        | <b>45,35,363</b> | <b>2,58,048</b> | <b>2,46,881</b> | <b>16,15,830</b>        | <b>11,58,494</b>     |
| <b>C:Moped: More than 75 CC to 100 CC and with fixed transmission Ratio, Big wheel size - more than 12"</b>                              |                  |                  |                         |                    |                  |                  |                         |                  |                 |                 |                         |                      |
| <b>C1: Engine capacity less than or equal 100 CC</b>   |                  |                  |                         |                    |                  |                  |                         |                  |                 |                 |                         |                      |
| TVS Motor Company Ltd (TVS XL)   | 37,314           | 42,427           | 1,70,067                | 1,69,171           | 39,499           | 36,465           | 1,20,007                | 1,77,964         | 65              | 66              | 1,110                   | 660                  |
| <b>Total Mopeds</b>  | <b>37,314</b>    | <b>42,427</b>    | <b>1,79,697</b>         | <b>1,69,171</b>    | <b>39,499</b>    | <b>36,465</b>    | <b>1,20,007</b>         | <b>1,77,964</b>  | <b>66</b>       | <b>66</b>       | <b>1,110</b>            | <b>660</b>           |
| <b>Total Two Wheelers</b>  | <b>18,50,777</b> | <b>19,15,799</b> | <b>84,65,918</b>        | <b>84,23,545</b>   | <b>15,57,429</b> | <b>15,56,594</b> | <b>55,83,265</b>        | <b>59,89,612</b> | <b>3,01,892</b> | <b>2,90,655</b> | <b>18,09,784</b>        | <b>13,53,687</b>     |
| <b>Quadricycle</b>   |                  |                  |                         |                    |                  |                  |                         |                  |                 |                 |                         |                      |
| Bajaj Auto Ltd (G...)  | 130              | 304              | 817                     | 1,768              | 84               | 110              | 278                     | 371              | 102             | 185             | 642                     | 1,412                |
| <b>Total Quadricycle</b>   | <b>130</b>       | <b>304</b>       | <b>817</b>              | <b>1,768</b>       | <b>84</b>        | <b>110</b>       | <b>278</b>              | <b>371</b>       | <b>102</b>      | <b>185</b>      | <b>642</b>              | <b>1,412</b>         |
| <b>Grand Total</b>   | <b>22,75,641</b> | <b>23,55,801</b> | <b>1,05,43,349</b>      | <b>1,07,23,157</b> | <b>18,77,072</b> | <b>18,45,182</b> | <b>82,95,039</b>        | <b>88,67,465</b> | <b>4,02,558</b> | <b>3,90,875</b> | <b>22,58,532</b>        | <b>17,85,834</b>     |

Source: IInd.a Automobile Manufacturers' Association (IAMTA)



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