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■ The Role of Beneficiation in India's Steel Industry

■ UNEP Praises RINL's World Environment Day 2024 Events

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Editorial Desk



D. A. Chandekar
Editor

Dear Readers,

The results of the general elections in India were declared on 4th June and the 18th parliament came into existence. The BJP lead National democratic Alliance (NDA) were able to surpass the mid mark of 272 seats and their leader Mr Narendra Modi was invited for the third consecutive time by the President to form the government. Accordingly the first swearing in ceremony was conducted and the new government is now in place. Industry welcomes Mr H D Kumaraswamy as the new Steel Minister of the country.

India took the liberal economy path way back in 1991-92 and as a part of this model, many commodities including steel was de-controlled. This meant that the steel prices were no more controlled by the government and also licence and quota raj in the iron and steel industry came to an end. Now anybody wanting to start steel production could do so without any permission from the government. This really helped the industry and the steel production rose manifold after this, thanks to the private entrepreneurship developed in the country.

Though the government no more

controls the industry after the liberalization, it is expected to act as a facilitator for the industry. There are so many issues facing the iron & steel industry in the country and the Steel Ministry being the custodian of the industry, should be addressing these issues on priority basis.

Though we have set an ambitious target of augmenting the steel producing capacity to 300 MTPA by 2030-31, we seem to be falling short by a big margin. There are not enough companies in the country to design and construct the steel plant. With the available resources, it is very clear that we will not be able to reach anywhere near our target. Further, only constructing steel plants is not enough, we have to develop the complete ecosystem like raw material linkages, enhance the production and availability of important inputs like iron ore, coal, lime, ferro alloys, refractories, etc. What is the status of these satellite industries? In my opinion, far from satisfactory as regards supporting our 300 MTPA target.

When we talk about such a huge target, we can not overlook the human resource factor. The number of metallurgists graduating every year is very very less. Further in many engineering colleges, the branch Metallurgy is merged with Material Science. How can we expect the steel industry to grow unless we produce enough metallurgists? Also, if we don't give enough salaries and good working environment, we can not retain them. They will surely search better industries to further their career.

The hon'able Steel Minister is quite familiar with the steel business. I am sure with his able leadership, the Ministry will address these fundamental issues and steer the industry ahead!

Write your comments :
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Indian Steel Industry is Pursuing Green Transformation

Susanta Ghosh
VP Steel and Chief of Process
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Susanta Ghosh boasts over 33 years of global experience in the metals and mining industry, serving in pivotal roles such as COO, CTO, CSO, CEO, and VP. He holds a B. Eng. from Bengal Engineering College, Calcutta University, India, and has completed a basic management course at Harvard University. Additionally, he has undergone extensive training at XLRI, Tata Management Development Center, and DuPont USA. Ghosh has led significant projects and negotiations exceeding \$2.5 billion in Malaysia and the UAE and is currently spearheading a \$5.2 billion, 6 MTPA green steel project in the UAE.

His expertise spans from iron ore to finished products, with deep involvement in decarbonization, green steel development, and hydrogen steelmaking. Ghosh has been instrumental in large-scale operations, digitization, AI applications, and employee engagement across diverse cultures. He has held prominent positions at Powerworx Steel LLC, Tembo Steels Uganda, Arabian Gulf Industries, and Emirates Steel Abu Dhabi, leading major transformations and sustainability initiatives. Recognized as a Best Metallurgist by the Indian Institute of Metals, Ghosh is also a member of various professional bodies including IIM and AIST. His career highlights include restructuring financially stressed companies, driving innovation in steel manufacturing, and establishing processes for CO2 capture and green hydrogen production.

D A Chandekar, Editor & CEO of Steelworld had an exclusive interaction with Mr. Susanta Ghosh to understand more about the present status of Steel market in Middle East, Indian Flat carbon steel market, India's transformation in Green Steel World, etc ?

1} How do you see the present status of Steel market in Middle East- Since you are presently located in the GCC region.

Rebar and Sections/ Sheet Piles are the major fast moving products in UAE and GCC market followed by Hot rolled coils/ plates and wire rods.

Rebar market:

The UAE rebar market, growing at 4.8-5.2% CAGR, is currently 3.5 million tons and projected to reach 5.0-5.2 million tons by 2027-28. Led by Emirates Steel Industries (ESI), producing ~200-240 kt/month and setting market trends. Other local producers, re-rollers and imports from Oman (~25-40 kt/month). The UAE is largely self-sufficient, controlling imports with strict codes and standards (BS 4449-500B, UK Cares). Local mill (ESI) has technical capability to produce special rebars including Seismic resistant BS-500C and high tensile (> 600MPa) Grades. The NEOM project in KSA shall require ~ 6 mtpa rebars (special ASTM



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706-80 grades). In 2022, significant high end rebar exports done to Israel, with previous significant exports to SE Asia despite lower price realization. Market stability and price dynamics is challenged by cheaper imported billets and usual high summer time.

Section market :

The GCC sections market is approximately 1.75 Mt, with the UAE and others accounting for ~54% and

representing ~50% of the GCC market, though ~40% is inaccessible to ESI as it does not produce medium to small sections. Key producers include SULB Bahrain and Emirates Steel for heavy sections. With Recent import of sections prompting local mill to lower & adjust prices. Around 200-300 kt were exported from the GCC, mainly to North America/EU. KSA is expected to have the highest growth rate (6.1-6.3% CAGR for 2024-27), driven by investments in social infrastructure. The NEOM project will be a significant offtaker (Jumbo) but major sizes beyond the production capabilities of GCC mills. The recently re-start up of earlier closed Star Steel produces some quantity lower to medium sections.

market, forecasted to grow at 11-13% CAGR from 2023-27, is currently 75-90 kt, with the UAE being the largest consumer at 25 kt. Growth is driven by efficient and locally available Z-piles, expected to reach 50% market share. Europe, North America, and Japan are major global consumers. Increased demand from Indian projects has boosted imports from UAE producers like ESI and ArcelorMittal. The market also started a rental segment of Sheet piles. Domestic small demand demand for U-piles is met entirely by imports. U Piles are popular in SE Asia. The GCC exports around 25 kt of Z-sheet piles, mainly to North America. Marine works consume ~70% of GCC sheet piles, with the rest used in infrastructure and temporary projects. Demand and consumption growth is expected to boost in India, MENA, and GCC due to economic development.

GCC Hot Rolled coil and

Plate market :

GCC hot-rolled coil (HRC) demand is 6 Mt, projected to reach 6.4 Mt by 2027, with UAE at 1.5 Mt, KSA at 3.0-3.2 Mt, and other GCC countries at 1-1.5 Mt. SABIC Hadeed in KSA is the sole producer, with 85-90% of its output consumed domestically. The GCC imports 3.0-3.5 Mt of HRC, covering 60% of consumption. Key segments: re-rolling (45%), pipe-making (40%), and fabrication (15%). Hadeed's width restrictions suggest a gap for a new HRC plant producing wide coils and specialty products, ideally green steel. However, UAE and



KSA ~32%. ESI's addressable market is around 800-850 kt,

Sheet Piles in UAE and GCC:

The GCC sheet piles

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Face to Face

GCC is free import zone and current low import prices are of giving challenges to New Co to come in.

Plate market in UAE and GCC:

The GCC plate market demand is 2.0-2.2 Mt, with UAE at 0.8-1.0 Mt, KSA at 1.0 Mt, and other GCC at 0.2 Mt. There is no domestic wide plate production, so consumption relies on imports of 1.6-1.8 Mt annually. Stockists, accounting for servicing over 50% of the market, to small and medium fabricators, while large end-users source directly from International mills. Plate demand is expected to grow

and construction.

Special Quality hot rolled coils and plates in UAE and GCC:

Speciality steel demand in the GCC is limited to auto repair, ship repair, pressure vessels, and oil and gas sectors. The oil and gas industry requires widths over 2.5 meters, which is out of specification of hot strip mills. SSAB, ArcelorMittal, Dillinger and NLMK maintain special steel limited stocks. Downstream growth is needed to support special HRC and plates, with short-term demand expected in Defense and Marine sectors. KSA/ UAE can play a vital role in developing Electrical

expected.

Wire rod market :

The wire rod market in the GCC, around 2.2-2.5 million tons with minimal to flat growth. UAE market is dominated by Emirates Steel Industries and Qatar Steel in the UAE. Demand is constrained by the lack of downstream industries like automotive and engineering. UAE is self-sufficient in wire rod, exporting some to other GCC countries. Market segments include construction wire mesh fabrication (65%) and galvanized wire (35%). Emirates Steel exports some quantity various Speciality Steels and Non-Rimming Electrode Quality wire rods . The LRPC/ ACSR downstream Industry in KSA and GCC is using imported PC 270K/ ACSR grade wire rods.

Metallics and Steel making in UAE :

GCC steelmaking primarily uses the DRI-EAF route, significantly reduces CO2 emissions compared to conventional BF-BOF methods. In UAE, approximately 1.2 mtpa of scrap is generated and processed scrap about 0.2~0.3mtpa. With recent export duties imposed from UAE, in ternincreases local availability of scrap, encouraging UAE steelmakers to use more scrap and reduce DRI utilization. Short-term projections suggest UAE could export 0.5-0.75 mtpa of DRI regionally and potentially become a net exporter of HBI to Europe in the long term. KSA plans to add 2.0-2.5mtpa of DRI capacity, with ongoing concerns over natural gas



at 2.5-3.0% annually, driven by mixed outlooks in oil, gas,

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availability in UAE and KSA. Important Environment concern in GCC Steel making:

The GCC has significant Induction Furnace steelmaking, necessitating stringent pollution mitigation practices. Effective waste management and recovery strategies for both Induction and DRI-EAF processes, particularly for FTP dust, sludges, and re-use must be prioritized. Additionally, waste re-use and briquetting projects should be considered in the annual capex allocations of GCC companies. Despite the extensive discussions about Green initiatives and Green steel within the industry, it is crucial to address *waste recovery and pollution mitigation comprehensively*.

2) Share your perception about the Indian Flat carbon steel market

India's carbon steel flat product market serves diverse sectors including construction, engineering, automotive, defense, and white goods. Current annual HRC production ranges from 50-53 million tons, with 23-24 million tons HRC uses directly to Cold Rolling, including 3-3.5 million tons exported. Approximately 43-48% of HRC is processed into cold-rolled products and downstream applications, totaling 20-22 million tons HRC for Cold rolling products. CR production stands at 20-22 million tons, with CRCA/CRSS at 10 million tons and full hard at 0.70-0.8 million tons. India

imports 2-2.5 million tons of special HRC annually, potentially substitutable by domestic mills. Emerging sectors like Defense, Navy, Marine, and Railways show increasing demand for special HRC and plates.

India's HR-PO capacity is 5.5-6 million tons annually, supporting the 23-24 million tons of HRC production. The P&O capacity need to increase considerably to support growth in construction, engineering, and automotive industries. The overall Flat market anticipates 7-8% annual growth.

Electrical steel consumption is Net 950-1000 ktons per year, with imports of 275-300 ktons, focusing on CRGO and CRNO grades. Investments totaling 750 ktons are planned to meet EV and electrical steel demand.

Expansion of PLTCM with CAL lines is needed for producing medium to high-strength auto-steel. There is a shortage of thin gauge in the market and production of 1.2-1.4 mm HR coils via ESP or midi caster technology aims is required to replace costly cold rolling processes. Plate mill production is set to double in 5-8 years, driven by heavy equipment, engineering, Defense and Agricultural sectors. Green steel availability and reducing CO2 emissions to less than 600 kg/t steel remain focal points, contingent on hydrogen technology adoption in the next 3-4 years.

3) How do you see India's transformation in Green Steel World?

The Indian steel industry is actively pursuing a green transformation with short-term initiatives such as increased scrap usage, hydrogen injection in blast furnaces, and transitioning to hydrogen fuels



Advancements in HRC products like IF HSLA, DP, AHSS, and higher strength CR steels are crucial.

to reduce carbon emissions. Long-term strategies include advancing DRI-EAF technology, implementing carbon capture,

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Face to Face

and expanding renewable energy use. Despite efforts, annual CO2 emissions are projected at 220-260 million tons for the next 4-5 years. This transformation is vital for sustainability in auto, engineering, and export sectors amid global concerns like CBAM in Europe. Immediate government actions are crucial, including establishing CO2 exchange mechanisms, green steel subsidies, and boosting R&D funding. Hydrogen's potential at competitive prices, combined with India's abundant low-grade iron ore, offers opportunities for H2-based DRI production. Greenfield projects can adopt models like POSCO's to integrate EAFs into existing BOF setups, reducing CO2 footprints. Collaboration between hydrogen suppliers, solar operators, and steelmakers is essential for scaling green steel production, supported by Financial guarantees and channelling International Finance and Export credits (ECA) by Indian banks. These measures aim to drive a sustainable shift towards green steel production in India. India needs Green Steel to pave way for Green Transformation.

4) How do you see the present &

the future of Indo-Gulf Trade with respect to Iron & Steel Industry ?

Trade with the GCC constituted 15.8% of India's total trade in FY2022-23, surpassing the 11.6% share of trade with the European Union. The UAE remains India's leading trading partner in the Gulf and ranks as India's third-largest trading partner overall, with Saudi Arabia following closely in fourth place. The Comprehensive Economic Partnership Agreement (CEPA) between India and the UAE, effective from May 1, 2022, grants preferential market access to over 97% of tariff lines.

While the primary focus of Indo-Gulf trade encompasses food security, supply chains, healthcare, energy security, renewable energy (including green hydrogen), chips and semiconductors, and technology sectors like

fintech and edtech, iron and steel are also significant. The government process aims to streamline customs documentation and promote trade in rupee currency, fostering an encouraging and conducive environment for trade between India and the GCC.

However, Indian steel and finished goods exporters must improve quality and packaging standards to meet global expectations. Rapid response to customer complaints, CRM and effective redressal systems are crucial. Emphasizing digitization and utilizing AI in logistics, customer grievance redressal, and final product management can enhance trade efficiency and user experience, converting data into a user-friendly format. ■



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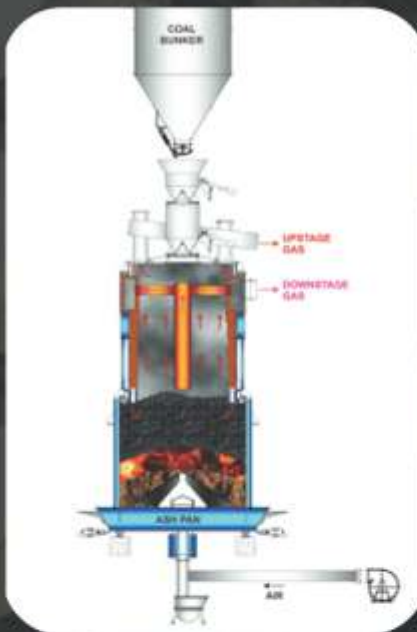
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H.D. Kumaraswamy – The New Steel Minister



H.D. Kumaraswamy, a seasoned politician with a rich legacy in Indian politics, has been appointed as the new Steel Minister in the Modi 3.0 government. Kumaraswamy, who has previously served as the Chief Minister of Karnataka, brings a wealth of experience and a strategic vision to his new role, promising to steer India's steel industry towards a sustainable and globally competitive future.

Early Life and Education

Born on December 16, 1959, in Haradanahalli, Hassan district of Karnataka, H.D. Kumaraswamy is the son of H.D. Deve Gowda, the former Prime Minister of India. Kumaraswamy completed his primary education in Hassan and went on to earn a Bachelor's degree in Science from Bangalore University. His early exposure to politics through his father's career significantly influenced his own political aspirations.

Political Career

Kumaraswamy began his political career in the early 1990s, following his father's path. He won his first Lok Sabha election from Kanakapura in 1996, quickly rising within the Janata Dal (Secular) party. In 2006, he became Chief Minister of Karnataka, forming a coalition with the BJP. His tenure, though brief, was notable for infrastructure improvements, agricultural boosts, and social welfare programs. In May 2018, Kumaraswamy began his second term as Chief Minister, this time in coalition with the Indian National Congress. He focused on agrarian issues, debt relief for farmers, and economic development. However, political instability led to the collapse of the coalition in July 2019, ending his term early.

Ministerial Responsibilities

As the new Steel Minister, Kumaraswamy aims to

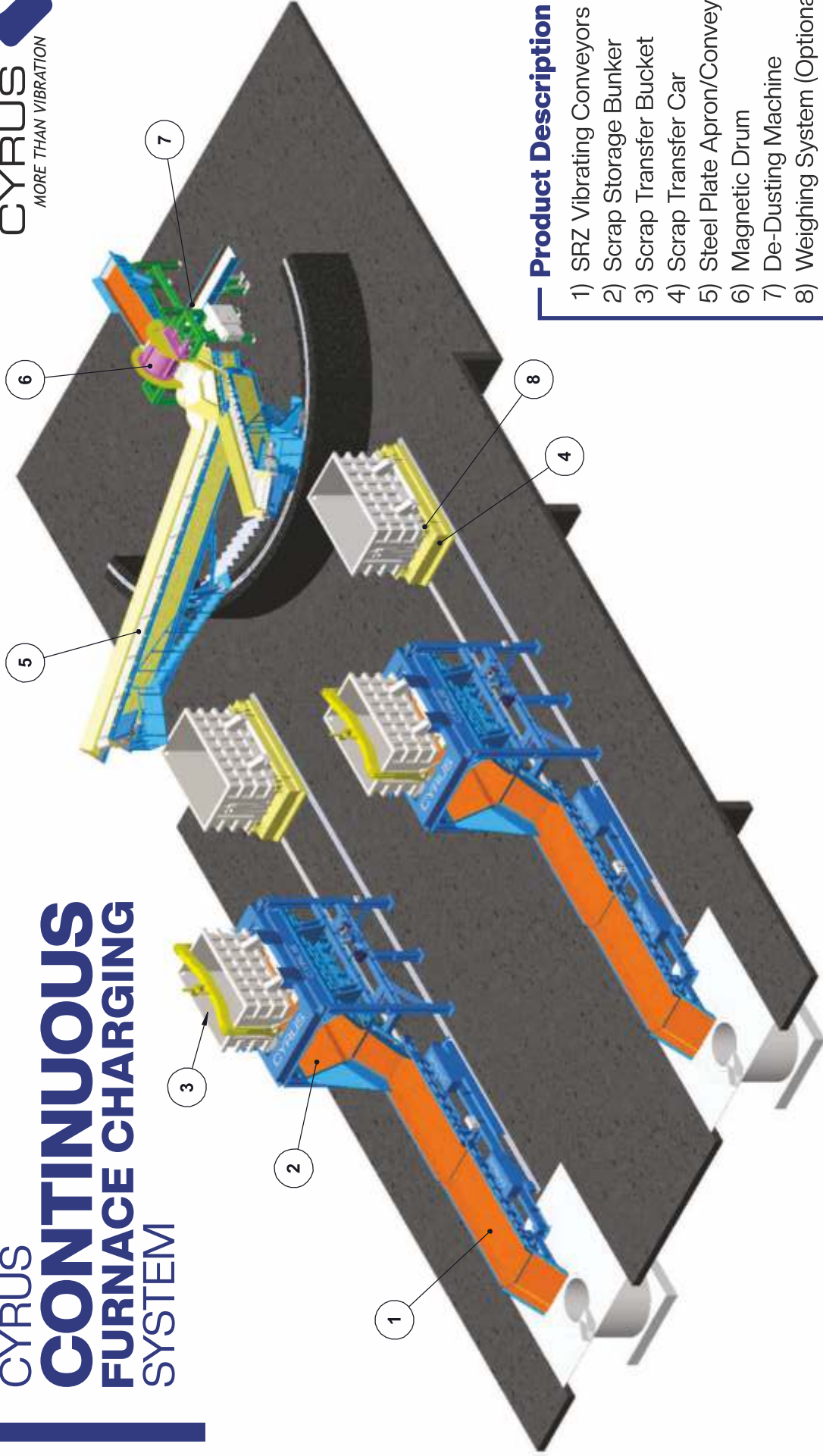
revitalize India's steel industry amid global economic challenges and environmental concerns. His priorities include boosting domestic production, enhancing competitiveness, and ensuring sustainable practices. He envisions leveraging advanced technologies, promoting R&D, and fostering public-private collaboration. Kumaraswamy plans to attract investments, streamline regulations, and develop infrastructure to support industry growth.

Environmental and Economic Focus

Recognizing the importance of sustainable practices, Kumaraswamy is committed to driving the steel industry towards greener production methods. This includes promoting the use of hydrogen-based steelmaking, enhancing energy efficiency, and implementing carbon capture and utilization technologies. By adopting these measures, he seeks to position India as a leader in green steel production, contributing to global efforts to combat climate change.

H.D. Kumaraswamy's appointment as the Steel Minister in the Modi 3.0 government brings a blend of political acumen, administrative experience, and a forward-looking vision to the role. His comprehensive approach to addressing the challenges and opportunities in the steel sector is expected to drive significant advancements, ensuring that India remains a key player in the global steel market while embracing sustainable and innovative practices. ■

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UNEP Praises RINL's World Environment Day 2024 Events

The United Nations Environment Programme UNEP World Environment Day campaign 2024 focused on land restoration, desertification and drought resilience under the slogan "Our land. Our future. We are #Generation Restoration" In tune with the Theme of World Environment Day celebrations 2024(WED2024), RINL has carried out various activities like bicycle rallies, poster and essay writing competitions to create an awareness to promote that Together, "we can restore land, build drought resilience and combat desertification" The Environment management department of RINL, the corporate entity of Visakhapatnam Steel Plant visited UNEP Official Campaign Website and Registered for WED2024 and showcased various initiatives implemented by

RINL towards protection of the environment. After Submission of various details, UNEP has listed RINL on the global map meant for International gathering to continue the battle against land degradation and drought. UNEP has also issued a Certificate of Appreciation to RINL- Visakhapatnam Steel Plant appreciating RINL for joining

#Generation Restoration movement and making World Environment Day 2024 a huge success. Sri Atul Bhatt, CMD, RINL extended his congratulations to the Environment Management Department for their commendable efforts, which earned RINL a Certificate of Appreciation from UNEP, highlighting their dedication to environmental excellence.



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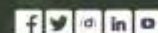

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Responsible Mining



The Role of Beneficiation in India's Steel Industry

Introduction

Earth holds an estimated reserve of 190 billion tons of iron ore, with India contributing approximately 33 billion tons, primarily composed of Hematite and a small amount of Magnetite. As the fourth-ranked global producer, India produced 280 million tons (MT) of iron ore in FY24. The growing demand for high-grade iron ore, particularly for the Direct Reduced Iron-Electric Arc Furnace (DRI-EAF) route, is driven by the need to reduce carbon footprints in steel production. Beneficiation of iron ore not only enhances its economic value but also reduces the carbon rate in blast furnaces, making it a crucial process in the iron and steel industry.

Types of Iron ore



Magnetite Ore (Fe_3O_4)



Haematite Ore (Fe_2O_3)



Limonite Ore ($Fe_2O_3 \cdot nH_2O$)



Siderite Ore (Fe_3CO_3)



Goethite Ore ($Fe_2O_3 \cdot H_2O$)



Banded Haematite Quartzite



Pyrite Ore (FeS_2)



Banded Haematite Jasper



Priya Ranjan Prasad
Director - Steel Making
Lloyds Metal

What is Iron Ore Beneficiation?

Iron ore beneficiation involves increasing the iron (Fe) content while reducing the gangue material, such as silica and alumina, in iron ore. This process improves the quality and suitability of the ore for further processing. Key processes in beneficiation include:

1. **Crushing and Grinding:** Breaking down the ore into smaller particles to liberate the iron minerals.
2. **Separation Techniques:** Utilizing methods such as scrubbers, magnetic separation, gravity separation, and froth flotation to remove impurities.
3. **Concentration:** Enhancing the iron content of the ore.
4. **Dewatering/Filtration:** Removing excess water from the concentrated ore.



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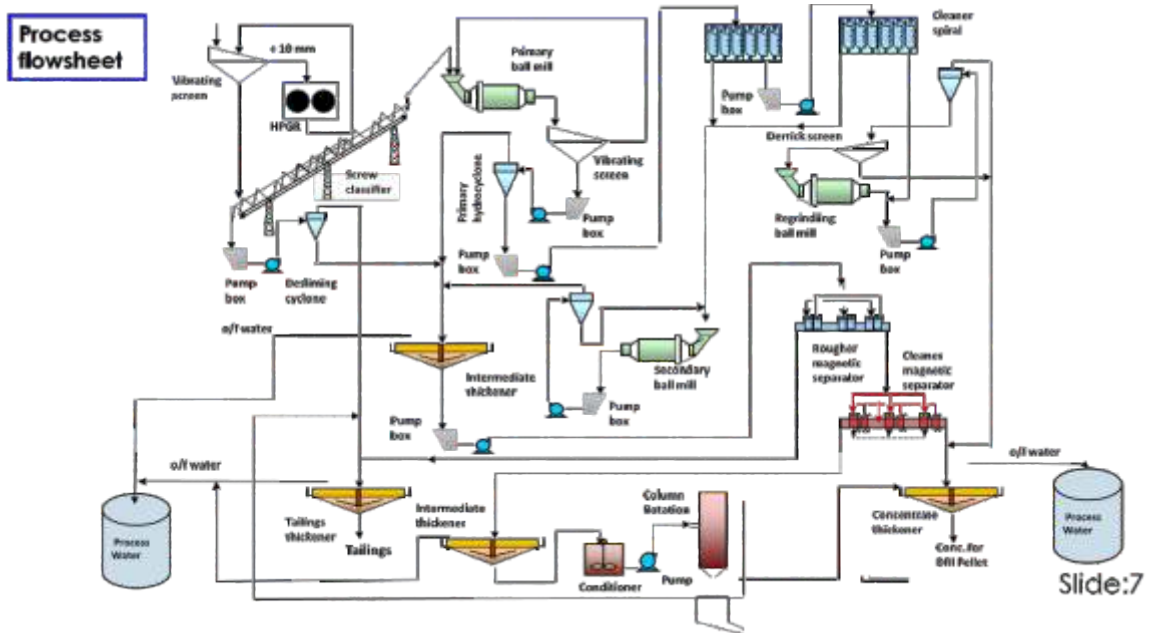
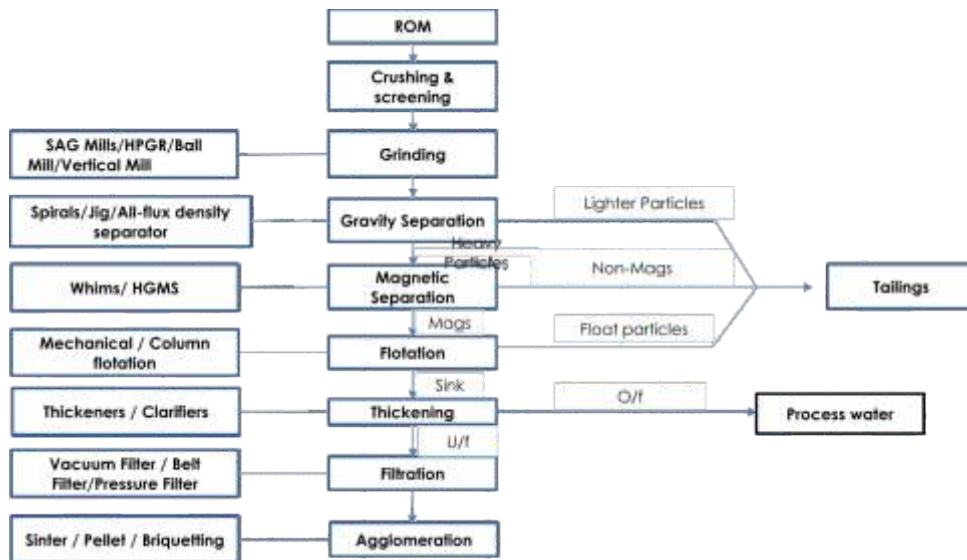
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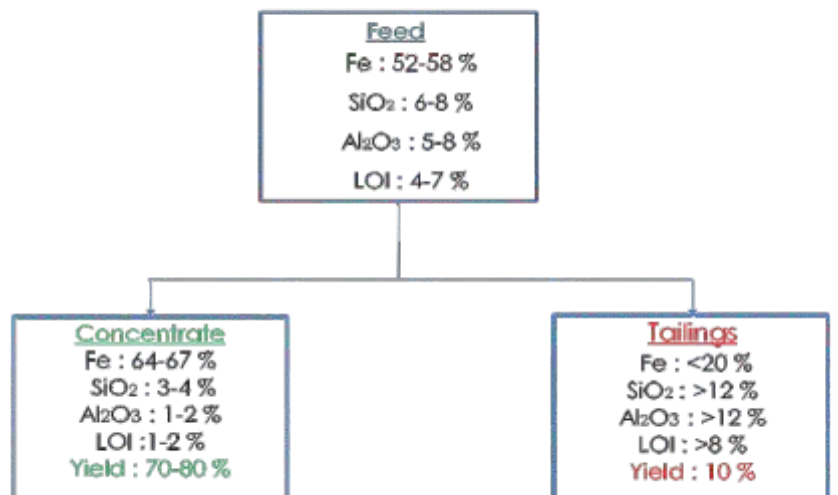
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Technologies used for beneficiation

Types of process	Used for
Washing & wet scrubbing	Heavy & valuable iron ore, based on Specific Gravity.
Gravity concentration	Ultra-fines particles.
Spiral	1mm to 0.03 mm
Magnetic Separators	Based on magnetic susceptibility
Low-intensity Magnetic Separator	1000 to 2000 gauss
Medium-intensity Mag. Separator	2000 to 7000 gauss
High-intensity Magnetic Separator	7000 to 20000 gauss
Froth Flotation	Finer than 65 mesh(#)

Benefits of Beneficiation in Iron Making

Blast Furnace:

- Reduction of Coke Rate and Improvement in Productivity: Decreasing alumina and silica content results in a lower coke rate and enhanced productivity.
- Increased Fe Grade: A 1% increase in Fe grade can lead to a 2% decrease in coke consumption rate.

DRI Process:

- High-Grade Pellets: The DRI process demands pellet Fe grades greater than 66% to ensure efficient production and reduced carbon emissions.

Challenges in Beneficiation

Despite its benefits, iron ore beneficiation faces several challenges:

1. Scale of Operation:

- **Size:** Managing operations on a large scale can be complex.

● **Low Grade/BHQ (Banded Hematite Quartzite):**

Processing low-grade ores and BHQ requires advanced techniques and technologies.

2. Tailing Management:

Effective disposal and management of tailings are critical to prevent environmental degradation.

3. Water Availability:

Adequate water supply is necessary for the beneficiation process, which can be a constraint in water-scarce regions.

4. Capital Cost:

High initial investment is required for setting up beneficiation plants and infrastructure.

Conclusion

The beneficiation of iron ore is a vital process for the Indian steel industry, enhancing the economic value of the ore and contributing to more sustainable steel production. By increasing the Fe content and reducing impurities, beneficiation not only improves the efficiency of blast furnaces and DRI processes but also helps in meeting the growing demand for high-grade iron ore. Addressing the challenges of scale, tailing management, water availability, and capital costs is essential for the successful implementation of beneficiation techniques, ensuring that India maintains its position as a leading iron ore producer while advancing towards a greener future. ■

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SMS Group Backs Synhelion's First Industrial Solar Fuel Plant

SMS group commends Synhelion for reaching a significant milestone with the launch of DAWN, the world's first industrial demonstration plant for solar fuel production. Synhelion is now moving forward with commissioning DAWN to commence solar fuel production soon. This innovative plant represents a crucial step in defossilizing the transport sector and showcases the potential of solar fuels in reducing CO2 emissions.

As a strategic investor and partner, SMS group played a vital role in implementing the energy storage system used in the DAWN plant. This commitment involved not only financial support but also expertise from SMS Concast, utilizing Paul Wurth

technology. Synhelion's thermal energy storage system is essential for ensuring continuous synthesis gas production, storing around two-thirds of the thermal energy generated during the day.

The collaboration between Synhelion and SMS group exemplifies creating synergies that benefit both the scale-up company and SMS group's product portfolio. Leveraging its expertise in the steel and metals industry, SMS group efficiently supports Synhelion's innovative thermal energy storage system, which is particularly suitable for high-temperature applications and offers a cost-effective alternative to battery storage.

Driven by the necessity for

decarbonization, SMS group is committed to significantly reducing CO2 emissions through sustainable technologies like those developed by Synhelion. Synhelion's renewable fuels have the potential to revolutionize the aviation industry, which heavily relies on combustion fuels.

Upon commissioning, the DAWN demonstration plant will produce several thousand liters of fuel per year. Synhelion plans to construct its first commercial plant in Spain starting in 2025, with a goal to increase production capacity to approximately one million tons of solar fuel annually within the next decade. These developments highlight the enormous market potential and the importance of Synhelion's solar fuels for a sustainable future. ■



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Sealing for Steel Rolling Mills

We are listening the stories of growth of Indian economy now a days. This has generated a pull for steel products from every sector. Year on year growth of Rolled products is almost in phase of steel requirement is of the order of @ 12.5%.Export is also growing with the rate of @ 11.5%, highlighting need for quality. Really speaking, *SEALING* is a small part of the overall industry, it has a good amount of impact & worth to study.

Steel Rolling Mills often run on extreme loads & temperature conditions varying from applications to applications. The applications vary from type of Rolling, i.e. Hot or cold

rolling, size & shape of products etc. The rolled products may be in various forms of sheets, rails, rods etc. used in Construction, Agriculture, Shipbuilding, Railroad tracks, Automotive etc. Rolled products are popular for it's advantages Viz, :

- Strength & hardness
- Process Tolerance Control
- Capability to achieve Surface Finish
- Dimensional Control through process
- Potential to have variety, by tempering & heat treatment

Each of these factors demand, high level of accuracy of parameters to be controlled in process.

Customers are cautious of VAVE & supply quality is significant for their business profitability, generating pressure on the suppliers.

Any rolling mill have equipment like valves, actuators, accumulators, furnaces hydraulic systems, rolling machinery. The hydraulic systems are quite sophisticated & control the balancing circuits working in close loop to control the processes.

Hydraulic systems often work at higher pressures and are designed for 300 bar to 500 bar, temperatures ranging up to 100 Deg C & speed @ 1 m/s. While the rollers experience 1260 Deg C, which is normally above recrystallization temperature at ~ 30m/s



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Technology

depending upon type of rolling & applications. The process parameters are extreme & need better control, through every possible equipment.

Focus of this article is on sealing & let's limit discussions to the same. The sealing becomes critical for functioning. Various forms & shapes of seals seem to be designed for different applications. Seals offer distinct advantages, viz;

getting product quality. Probable hazardous situations, due to leakage of inflammable fluids in hot environment, are avoided.

Lower friction : Save energy or power, which help in driving towards *Carbon Neutral Environment*. Choice of materials, design of sealing lip-spring & surface preparation of mating steel devices & choice of lubricants, help lowering the friction.

Improve Life:



Control leakages: Help maintain parameters. The Hydraulic systems used for Work & Balancing Roller do have closed loop control. The electronic control systems get feedback from the rolled out products, control load on the balancing roller through chokes. Use of such advanced systems demand reliable output from cylinders. Seal packs in reciprocating piston-cylinder, Rods are critical for the application. Maintaining system pressure, speed, speed of response, help in

Maintenance of heavy equipment's are not easy & it results into loss of production & cost. Good seal designs lower down time.

Enhance Quality: The product quality largely depend upon smooth running of rollers. Dynamics of the Work Rolls & Support rolls is the key for the same. Quality of the rolled products is defined by its surface quality, thickness variations across length & Breadth. The bearings used, are; heavy duty taper roller bearings & are greased for lubrication. The seals for the same have

two way function. It has to arrest leakage of internal lubricant & restrict entry of hot metal scales, hard particles, cooling fluids etc. into the bearing. The temperature of the pedestal has to maintain within bearing specifications. Any sort of -vibrations, chattering or speed variation reflects directly into the rolled product quality & is not acceptable.

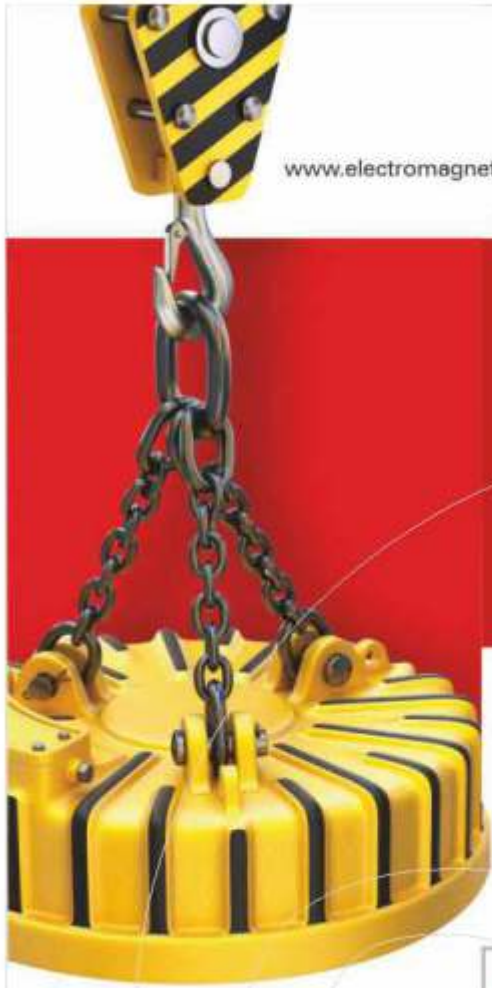
The seals are specially designed to the form & shapes suitable to the equipment. Commonly used seals are, Lip seals, V-Packs or even mechanical dynamic seals. The materials used, range from FKM-FPM or Viton, PTFE etc. In some cases Bronze filled PTFE inserts are used as dynamic sealing face, rubbing against the shaft face. These materials are resistant to Ozone aging & are stable in fuels e.g. petroleum based oils, greases, aliphatic & aromatic hydrocarbons, which are often seen used in the systems. Cooling water too is used in few applications. The seals for rollers have an interesting layout & construction. Inner seal protects the bearing oil while the outer seal holds cooling water or coolant. The third outer seal isolates the bearing assembly from external dirt or hot scales. Their material, construction commensurate the specific need. V-Packs, Lip seals have a small contact with the mating part & is prone to heat up & get damaged. The surface of Lip seal near contact edge is provided with helical grooves which tend to resist the outflow of fluid.

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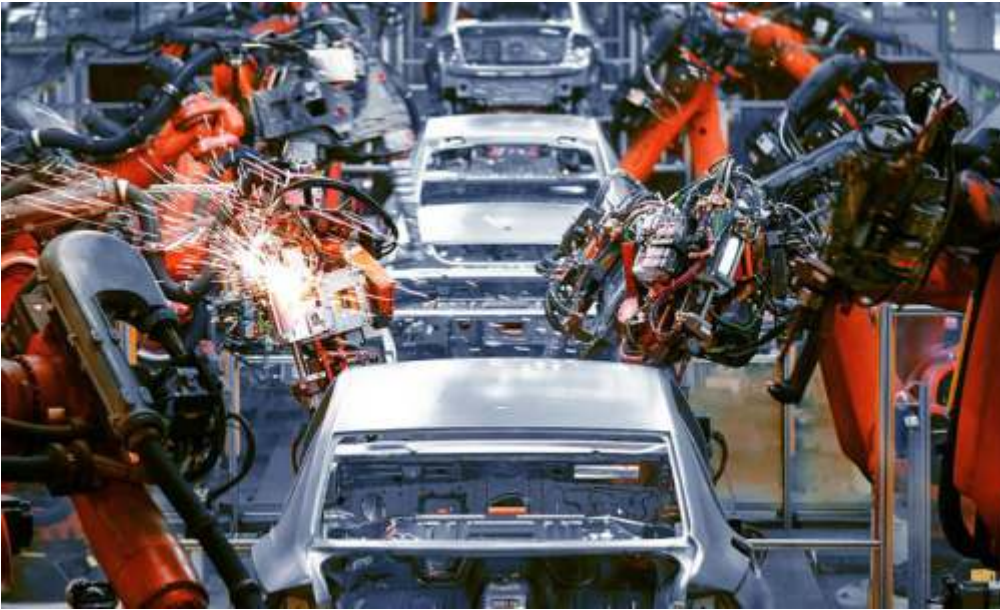
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Hence the selection of the pattern, for given direction of rotation is important too. While in case of mechanical seals, the contact surface or rubbing surface works under a micro film of media which acts as lubricant by itself & help in heat dissipation. The design of contact surface, contact pressure, fluid pressure balance across both sides has to be defined critically.

System fluids can be used to lubricate the seals & or can be assembled with suitable Grease. Lubrication or greasing schedule has to be adhered for better performance of the seal. Loss of Flow or specified pressure of circulating fluid or coolant, is likely to cause seal failure & consequential damages to the equipment & product. Hence proper controls of the system through sensors & close loop systems are required. Mating surfaces of the equipment has to be designed with hardness, finish & tolerance specified by the seal suppliers, so that

the base equipment doesn't require any maintenance or rebuilding of the surfaces. Particularly; if the seal has mechanical sealing surface like carbon or bronze filled Teflon or Teflon the flatness & finish is controlled by specified lapping process. The assembly has to be done with specified lubricants & in clean environment, free of dirt or



hard particles. In order to lower maintenance time & efforts, it's preferred to use split seals where ever possible..

Export market is more sensitive to quality & consistency.. For example, in case of automotive, BIW sheets have a huge impact on weight of vehicles. It also affect the look and aesthetics. The manufacturing process are critical and even LASER welded panels are used by many vehicles. It requires more precision in Competitive market.

To summarise the discussions sealing has a good role to play & the rolling mill equipments have to be designed with due considerations. ■



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TYASA and Primetals Celebrate 10 Years of EAF Quantum

Mexican steel producer Talleres y Aceros S.A. de C.V. (TYASA) and Primetals Technologies recently celebrated a milestone for the world's first EAF Quantum plant in Ixtaczoquitlan, Mexico. On May 7, 2024, the 100-ton electric arc furnace marked 10 years of operation, with 77,000 heats and nearly eight million tons of production.

Oscar Junior Chahin, Co-CEO of TYASA, expressed satisfaction with the achievement: "Back in 2014, our goal with the meltshop investment was to significantly increase annual production while keeping operational costs low. The

EAF Quantum has exceeded our expectations in terms of reliability and efficiency."

The EAF Quantum's innovative scrap preheating system reduces power-on times and energy consumption, leading to lower operating costs and reduced CO2 emissions. The furnace achieves power consumption figures below 300 kWh per ton, with a power-on time under 29 minutes and a tap-to-tap time of less than 33 minutes.

Founded in 1985, TYASA operates in Ixtaczoquitlan and Mérida, producing special steel grades, flat steel, coated steel, and construction items.

Primetals Technologies has equipped TYASA with a complete minimill, including the EAF Quantum, twin ladle furnace, twin vacuum degasser, continuous casting machine, and a reversing cold mill. In 2018, TYASA also commissioned a combined galvanizing and color coating line from Primetals Technologies.



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India lucrative for steelmakers because of higher infra spending, economic growth

The government's infrastructure expansion push in urban & rural areas and schemes like PM Gati Shakti and Make in India contributed to increased steel demand.

Despite a slowdown in exports and increasing Chinese steel output impacting India's share in the markets, steel makers in the country are optimistic about the domestic demand.

India's export of steel in May 2024 was 0.5 Million Tonnes (MT), lowest in the last six months. It was 0.66 MT in April 2024.

Indian exports have been affected by a variety of reasons in the recent past including low production due to



scheduled maintenance shutdowns, preference for the domestic market over exports, limited export quotas from the EU, the slowdown in global steel demand and competitive prices from China.

The country's finished steel consumption jumped 10.5 per cent to 23 MT in April-May 2024, a six-year high, reflecting very strong sentiments with steel makers optimistic about India's domestic demand.

Due to the extension of EU Safeguard Measure on steel, particularly European hot-rolled coil (HRC), by a further two years to June 30, 2026 and the availability of higher quantities of steel from China for exports, the Indian exports are expected to be under pressure in the coming months as well. However, the strong domestic consumption is likely to offset the losses in the export market, said Anil Kumar Chaudhary, Chair, Minerals and Metals Committee, PHD Chamber of Commerce and Industry.

"Higher infrastructure spending and accelerated economic growth have made India a very lucrative market for domestic and global steel makers," he added.

According to research firm SteelMint, domestic finished steel consumption has witnessed a growth of 13 per cent to 136 million tonnes during 2023-24. The major demand

for steel consists of the automotive and infrastructure sectors. The total consumption of steel was around 120 million tonnes in the preceding financial year 2022-23.

The government is also optimistic about the growing steel demand in the country. Steel Secretary Nagendra Nath Sinha had last month that demand will grow at about 10 per cent.

Sanjay Gupta, Chairman and Managing Director, APL Apollo Tubes Limited, said the domestic demand for steel in India is significant and growing, driven by robust construction, infrastructure projects, and the automotive sector.

"With the Indian government's focus on infrastructure development and the 'Make in India' initiative, there is potential for increased domestic steel consumption. The industry can capitalize on these opportunities by investing in capacity expansion, adopting advanced technologies, and enhancing operational efficiencies," he added.

As per the steel market watchers, the companies are getting margins of up to 15 per cent which signifies the potential of the domestic market.

Gupta says that the steel prices have been under pressure due to a slowdown in global demand but some companies have managed to maintain satisfactory margins through cost-cutting measures and efficiency improvements.

According to a CRISIL report, India became a net importer of steel in fiscal 2024, with an overall steel trade deficit of 1.1 million tonnes (MT). The government's thrust on expansion of infrastructure in urban and rural areas and schemes such as PM Gati Shakti and Make in India have contributed to increased demand for steel.

India's plan for raw material curbs ignores Red Sea crisis: Arcelor-Nippon

The curbs planned by the world's second-biggest producer of crude steel could hit output, as they cap imports of a steelmaking fuel, low ash metallurgical coke

ArcelorMittal's India joint venture has privately warned trade officials in New Delhi that a plan to curb imports of a key raw material for steelmaking overlooks the implications of the Red Sea crisis, a letter showed.

The curbs planned by the world's second-biggest producer of crude steel could hit output, as they cap imports of a steelmaking fuel, low ash metallurgical coke, also known as met coke, at 2.85 million metric tons for a year.

The April proposal, which came after growing shipments caused "serious injury" to domestic producers, also recommended setting quotas on met coke for exporting nations.



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News Update

"India should not close its eyes to the geopolitical situation and implement a measure that may adversely affect its steel industry," the company told the directorate general of trade remedies (DGTR) in the June 3 letter, seen by Reuters.

Quotas envisioned for European countries under the plan "will very seriously affect" imports from the region, it added.

The company, India's commerce ministry and the trade remedies body did not respond to requests for comment. No date has yet been set for the proposal, now being reviewed by the commerce ministry, to take effect.

India's plan to allot about 40 per cent import quota to European nations will affect ArcelorMittal Nippon Steel India (AM/NS India) as the Red Sea crisis has already forced rerouting of vessels, and boosted ocean shipping rates, the company said.

The company does not use domestic met coke. India's imports of the fuel have more than doubled over the past four years, and its top suppliers include Poland and Switzerland, as well as China and Indonesia.

Attacks on ships in the Red Sea by Yemen's Iran-aligned Houthi militants are disrupting trade, with freight firms switching to routes around the Cape of Good Hope to avoid the Suez Canal.

India must reconsider the proposal as it could hit the steel industry, the company, which has not commented on the matter publicly, urged in its letter.

This month, Reuters reported that India's steel ministry also did not favour limits on imports of met coke, citing risks to domestic output.

In its letter, AM/NS India said authorities proposing the curbs did not factor in the prospect of increased demand for met coke as steelmakers plan to add capacity.

"The quantitative restraint on imports will reduce the ability for the steel industry to raise its capacity and growth levels," it added.

One of India's leading steelmakers, with annual capacity of about 9 million metric tons, AM/NS India competes with JSW Steel Ltd and Tata Steel Ltd.

India has option to hit back at EU tariffs with retaliatory custom duties

The EU has extended safeguard duties on certain steel imports, scheduled to expire this month, by another two years till 2026.

India has the option to propose the imposition of retaliatory customs duties under the WTO norms on goods imported of a certain value from the EU, as the two sides have failed to reach a consensus on the European Union's safeguard measures on some steel products, an

official has said.

The EU has extended safeguard duties on certain steel imports, scheduled to expire this month, by another two years till 2026.

This is the second extension of the safeguards that take the form of the Tariff Rate Quota (TRQ), first imposed in 2018.

India is one of the countries affected by this measure as it has a substantial interest in steel exports to the EU.

In 2023-24, India's iron and steel and their products exports to the EU increased to \$6.64 billion from \$6.1 billion in 2022-23.

India, along with other countries, has earlier raised concerns at the World Trade Organisation (WTO) over the European Union's (EU) move to extend safeguard duty on the import of certain steel products till 2026.

New Delhi has also submitted its concerns to the EU regarding the manner in which safeguard measures have been extended and is violative of the global trade provisions and the WTO's Agreement on Safeguards.

"India has substantial interest as an exporter of the products concerned. The EU's measure is inconsistent with global trade rules. India and the EU officials held bilateral consultations on the issue earlier this month but both sides have not been able to reach a consensus on the matter. And now, India has the option to propose imposition of retaliatory customs duties under the WTO norms on certain value of goods imported from the EU," the official said.

The commerce and steel ministries are deliberating on the quantum of impact.

The EU's move follows the US decision to impose additional duties on steel imports during the Trump administration.

As per the WTO rules, if no agreement is reached on the compensation within 30 days of the consultations, India reserves its right to suspend concessions or other obligations substantially equivalent to the adverse effects of the measures under the WTO's Agreement on Safeguards on the EU's trade, and any other right available under GATT 1994 and Agreement on Safeguards.

In 2019, India sought consultations with the European Union under the aegis of the WTO against a move of the 28-nation bloc to impose safeguard duties on certain steel products. The country had sought these consultations under the WTO's Agreement on Safeguards.

Against the US move to impose high customs duties on certain steel and aluminium products, the EU, in July



2018, proposed the imposition of definitive safeguard duties to protect their industry against a surge of imports. India is concerned about the European Union's move as it exports nearly 6 per cent of its steel output to Italy. Italy is a member of the EU.

In a similar issue, India has, in 2022, proposed additional customs duties of 15 per cent on the import of 22 products, including whiskey, cheese and diesel engine parts, from the UK in retaliation to Britain's decision to impose restrictions on steel products.

New Delhi has also flagged serious concerns over the carbon tax being imposed by the EU on certain sectors like metal.

The WTO is a Geneva-based, 164-member global body which frames rules and norms for exports and imports and adjudicates trade disputes among member countries. India is negotiating a free trade agreement with the EU to boost trade and investment ties.

India's exports to the EU rose about 1.5 per cent to \$76 billion in 2023-24, while imports dipped by about 3 per cent to \$59.38 billion in 2023-24.

80% of Indian steel producers have labelled 'Made-in-India' on products

The source said that the 'Made in India' branding, along with a QR code, provides for labeling of domestic steel products with details of the product. "

Following the Ministry of Steel's initiative to brand products with 'Made in India', Indian steel producers (ISPs) have labelled 80 per cent of their products since November last year, said an official on Monday.

"Ministry of Steel was the first to initiate and complete the branding exercise. The efforts would result in branding of 80 million tonnes of steel out of the production of 125 million tonnes in the first phase," the official added.

Indian steel producers have finalised common labels across the product categories and allocated size and space for the 'Made in India' logo for each label.

"All the ISPs have started roll out of branding with selected categories of steel products in their product portfolio by fixing of new 'Made in India' label on their products from November 4, 2023 onwards," the source said, adding RINL, JSPL and TATA Steel Ltd have covered 100 per cent of their product range, while the rest will complete the branding by the end of June.

Explaining the need of the branding, the source said, "the label will help to create a common brand value for all Made-in-India steel products nationally and internationally and to further encourage manufacturers to maximise their local manufacturing process, thereby giving a much-

needed boost to the Indian economy.

In the long run, it will be a key identifier for Indian steel sector markets across the world, further cementing India's position in global markets. The Made in India Label along with the overall country branding through the Brand India Mission will complement each other and help in achieving the final goal of 'Atmanirbhar Bharat' making for India and the world."

According to sources, the concept was initially suggested by Prime Minister Narendra Modi, which was later conceptualised by the Department for Promotion of Industry and Internal Trade (DPIIT) and implemented by the Steel Ministry.

The source said that the 'Made in India' branding, along with a QR code, provides for labeling of domestic steel products with details of the product. "The vision is to boost credibility of 'Made in India' and promotion of domestically-produced steel and to enable the Indian consumers to make an informed choice. 'Made in India' Label is intended for both domestic market and also for exports," the source said.

India imported 8.3 MT steel in FY24, becomes net importer of the metal

Exports from India were impacted by weak global markets and competitive pricing by China, while South Korea and Japan maintained their export volumes to the country, according to a report by Crisil.

From being an exporter of steel, India became a net importer of the metal in FY24, with an overall trade deficit of 1.1 million tonnes.

Exports from India were impacted by weak global markets and competitive pricing by China, while South Korea and Japan maintained their export volumes to the country, according to a report by Crisil.

India imported 8.3 million tonne (MT) of finished steel in FY24, a 38% year-on-year increase, primarily from China, South Korea, Japan, and Vietnam. The country had been a net exporter of steel since FY17.

However, strong domestic demand remains a bright spot for the Indian steel industry, the report said.

China led the pack with exports of 2.7 MT to India in FY24, driven by lower investments in its real estate sector and weak steel consumption. This prompted Chinese steel mills to seek opportunities outside the country to boost volumes.

South Korea exported 2.6 MT to India, while Japan exported 1.3 MT, maintaining their export volumes. Vietnam, with a 130% y-o-y increase, also became a significant exporter to India.



News Update

Flat steel products accounted for 95% of finished steel imports by India, with non-alloys making up 76% of the flat steel category. Hot-rolled (HR) coils and plates accounted for 62% of the imports, witnessing a 117% rise.

Galvanised plain and galvanised corrugated (GP/GC) sheets and electrical sheets saw a 41% and 25% rise, respectively, with China being the primary source of these imports.

In the calendar year 2023, China's global exports rose 38% y-o-y to about 94 MT of iron and steel products.

Indian exports of finished steel totalled about 7.5 MT in FY24, up 11.5% from the low base of the previous year. In terms of volume, flat products accounted for the bulk of the exports, with the European Union being the country's largest export market.

Exports had declined in the first half of FY24 but picked up pace in the second half, particularly in the last quarter, increasing 37% y-o-y.

Italy and Belgium were the top export destinations, followed by Nepal and the UAE. Exports to the EU rose 51% in FY24, with the region accounting for 36% of India's overall export basket, the report added.

JSL supplies SS for 'Made in India' freight wagons shipped to Mozambique

Jindal Stainless recently supplied stainless steel to manufacture 100 'Made in India' freight wagons, being exported to Mozambique. These wagons, made up of grade IRSM 44 stainless steel specially developed by Jindal Stainless for Indian Railways freight stock, were exported from Gujarat's Deendayal Port to South Africa's Mozambique's Port of Nacala with the support of the Ministry of Ports, Shipping and Waterways, Government of India. The ministry hailed the development as a major step forward in India's improving export capabilities and its growing prowess in manufacturing and logistics.

The custom-made tippler-style wagons, with a payload of 63 metric tonnes each, were conceptualised and designed by Jindal Rail Infrastructure (JRIL).

JRIL has a proven track record of supplying superior quality railway wagons to Indian Railways, the private sector and international markets, and developing new designs of wagons. JRIL has designed and developed these wagons which are lighter in weight from existing wagons. Around 4.3 tonnes of stainless steel specially developed by Jindal Stainless was used to fabricate the floor, side, and end walls of each wagon. Choosing stainless steel over carbon steel ensures enhanced durability and longevity due to its superior corrosion resistance and inert properties, leading to a lower life cycle

cost and lower life cycle carbon emissions. The wagons will help transport coal and iron ore, among other things. Of the total 100 wagons, 24 have reached Mozambique, 26 are currently at the port, and the remaining 50 are being transported to the port.

SEFI Representatives Meet Union Minister Of Steel HD Kumaraswamy

Discussions on strategic partnership/merger of PSUs in



steel sector and SEFI get many assurances from the minister.

Office bearers of Steel Executives Federation of India (SEFI), met Union Minister of Steel, HD Kumaraswamy and demanded immediate release of payment of 11-month pending perks of officers. Mainly in lieu of privatization of public sector steel plants, restructuring, strategic partnership/merger, immediate reinstatement of 11 months pending perks arrears (from 26.11.2008 to 04.10.2009) of SAIL officers, suspension of thirty nine officers. During this, SEFI Vice-President, Narendra Singh and SEFI Treasurer S. Loknath were present.

SEFI informed the Union Steel Minister that under the new Steel Policy 2030 of the Government of India, SAIL has been directed to expand capacity by the Ministry of Steel, under which SAIL has been given a target of acquiring a capacity of 35 MT by the year 2030. In this expansion plan, Rs. One lakh crore is to be invested by SAIL. The expansion target can be achieved soon. While this step will help in rapidly increasing the production capacity of the cell, these national assets can be saved from disinvestment and their full potential can be utilized. Along with this, the interests of the workers working in these units can also be protected.

SEFI informed the Union Steel Minister that Nagarnar Steel Plant is a state-of-the-art steel plant with a capacity of 3 MT at a cost of 24000 crores which is a complete unit of crude iron ore mines. Only 200 officials and 1000 employees are available to run it which is insufficient. Mecon is currently responsible for the operation of this



plant, Mecon has no prior experience in operating a steel plant. Under these conditions, the profitability of this plant is also greatly affected. Similarly, Rashtriya Ispat Nigam Limited is a unit full of skilled technical experts with a capacity of 7 MT which is currently struggling with shortage and high prices of raw iron ore.

Since its inception, SEFI, the apex body of executives of public sector steel undertakings, has been emphasizing restructuring and strategic adjustment of public sector undertakings instead of indiscriminate privatization and divestment. By strategic merger of these units, where raw material will be available to one unit, the other unit will be facilitated in getting full human resources with technical capability. In this way both the Steel PSU will start benefiting by complementing each other which will provide financial support to the Government of India.

Steel Executives' Federation of India urges Centre to merge VSP with SAIL again

At a time when the Ministers of the NDA governments in the State and at the Centre, and the leaders of the alliance parties are assuring that the Rashtriya Ispat Nigam Limited (RINL), the corporate entity of the Visakhapatnam Steel Plant (VSP), will tide over the current financial crisis, the Steel Executives Federation of India (SEFI) and Visakhapatnam Steel Executives Association (VSEA), and others are demanding that the Union Ministry of Steel merged the VSP with the Steel Authority of India Limited (SAIL) again.

The SEFI office-bearers have recently met Union Minister of Steel H.D Kumaraswamy and brought the merger idea to his notice. The VSEA representatives met Ministry of Steel Joint Secretary Vinod Kumar Tripathi.

Speaking to *The Hindu*, VSEA president Katam Chandra Rao said the SEFI apprised Mr. Kumaraswamy of the importance of the merger of the VSP with the SAIL.

Under the new Steel Policy-2030 of the Centre, the SAIL has been given a target of expanding its capacity to 35 MT (million tonnes) by 2030. As part of this expansion plan, ₹1 lakh crore is to be invested by the SAIL.

"We have urged the Union Steel Minister to merge the VSP with the SAIL again to achieve its target set for 2030. The VSP has a pool of skilled technical experts and a capacity of 7 MT. The plant is struggling due to shortage and high prices of iron ore. The SEFI has been emphasising restructuring and strategic adjustment of public sector undertakings instead of indiscriminate privatisation and divestment. By strategic merger of units (Vizag RINL and Chhattisgarh NMDC Nagarnar steel plants), where raw material will be available to one unit, the other unit will be facilitated in getting human resources. In this way, both the PSUs will complement

each other and generate good revenue," Mr. Chandra Rao said.

The SEFI held a council meeting in New Delhi on January 5 this year to discuss the reemergence of the RINL with the SAIL.

India and Korea plan Free Trade Agreement upgrade as ministries work on 'offer list'

With talks to upgrade the existing free trade agreement (FTA) moving forward between India and Korea, the department of commerce is engaging with different ministries, including heavy industries, steel, and chemicals



to prepare the offer list, which will be part of the negotiations, which are underway.

Preparation of the list is part of the negotiations, which are underway, for the upgrade of the existing FTA between the two countries, dubbed as comprehensive economic partnership agreement (CEPA). The agreement was operationalised in January 2010...

The official said both sides have exchanged the request list and "are working on the offer list" and for that the commerce ministry is holding discussions with different ministries, including steel, heavy industries, textiles, chemicals and petrochemicals etc.

India has also raised concerns on the growing trade deficit between the two countries. India's exports to Korea dipped to \$6.41 billion in 2023-24 from \$6.65 billion in 2022-23 and \$8 billion in 2021-22. The imports stood at \$21.13 billion in the la...

India has sought greater market access for certain products such as steel, rice, and shrimp from South Korea with a view to boost exports of these goods, the official added. India has flagged issues over Korean firms not buying Indian steel. The exercise assumes significance as both sides have shared the hope that the CEPA upgradation negotiations would play an important role in strengthening and deepening economic co-op. 'Addressing these issues is crucial for India to achieve a more equitable and mutually beneficial trade relationship with South Korea under the CEPA framework," Srivastava said.

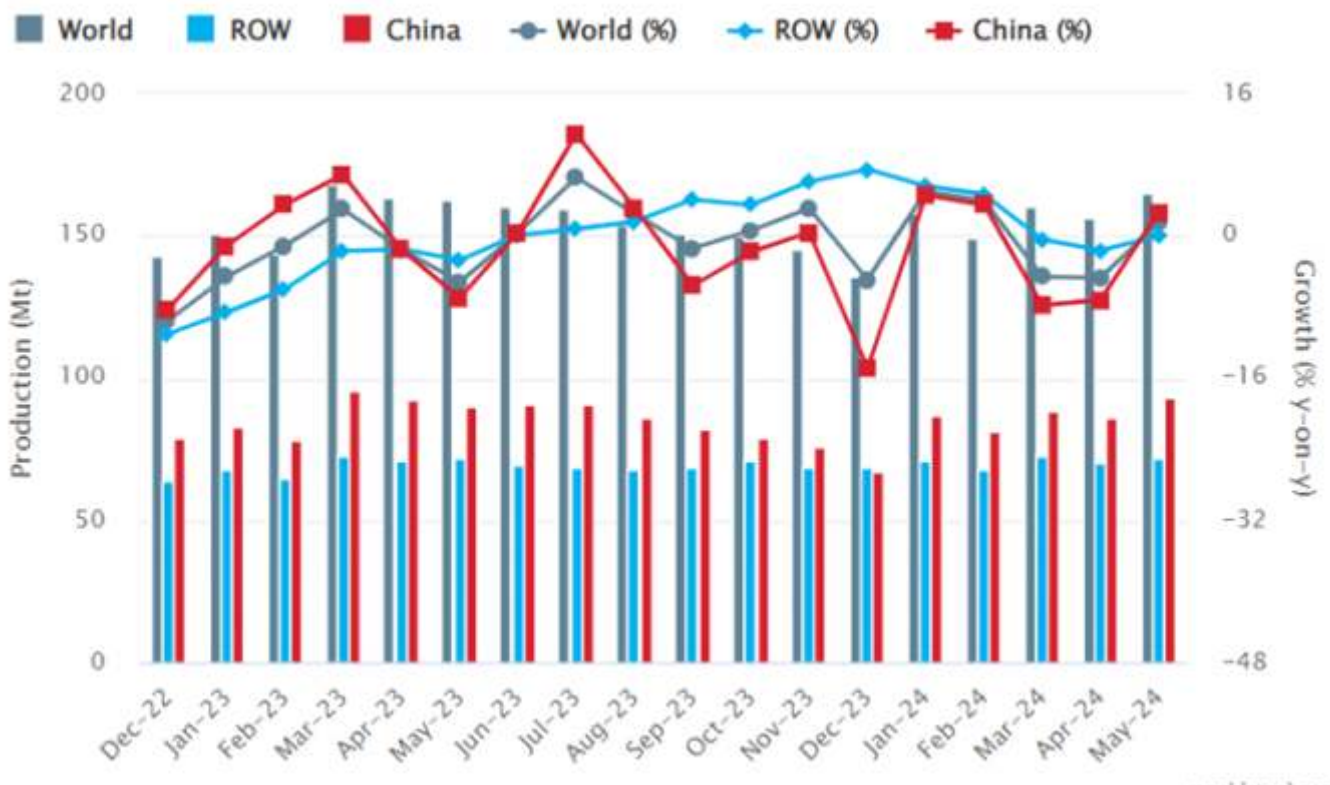


Global Steel production stood at 165.1 million tonnes (Mt) in May 2024: WSO

Global steel production in May 2024 increased by 1.5% compared to the same month in 2023 to 165.1 million tons. The figure increased by 6.4% compared to April. This is evidenced by the global ranking of 71 steel-producing countries by the World Steel Association.

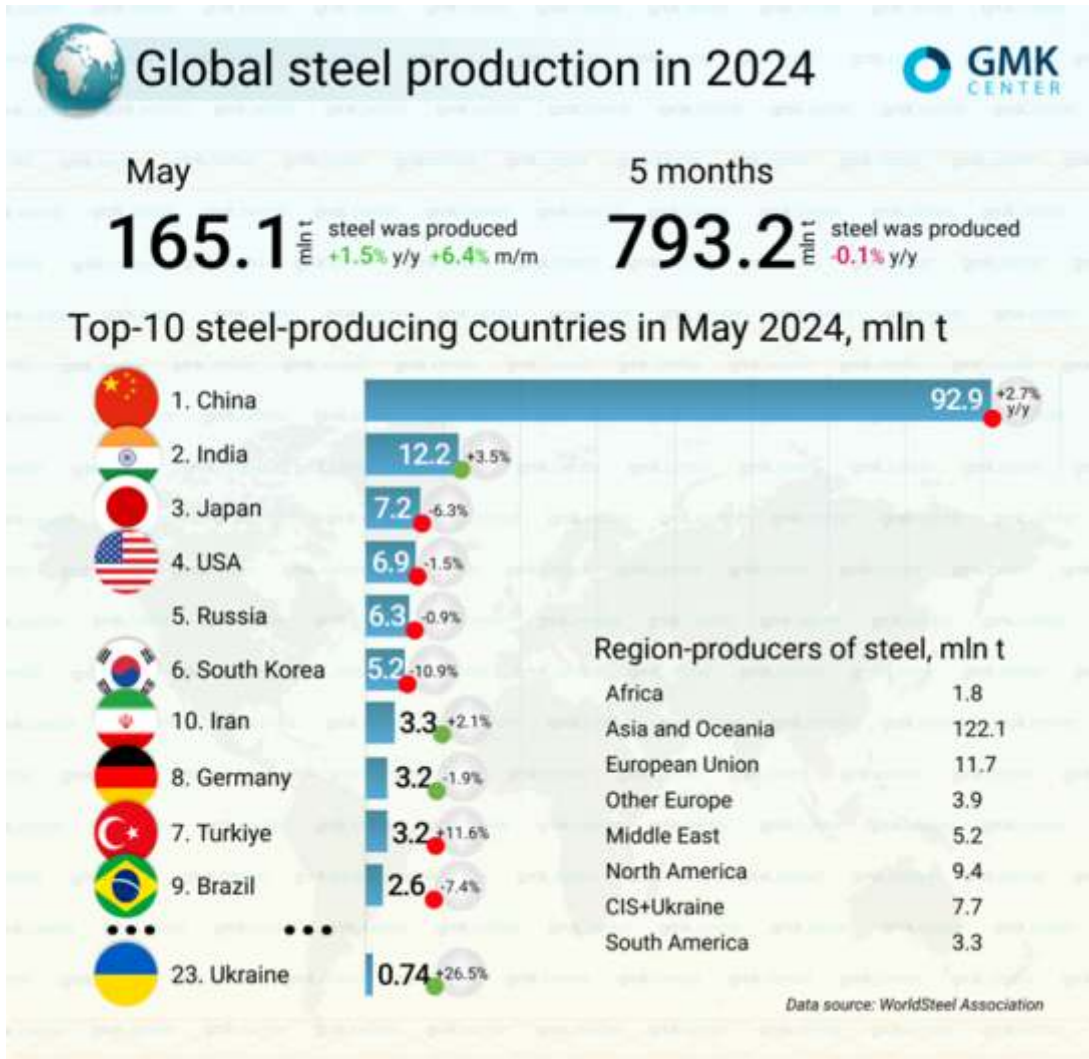
Total steel production in the CIS+Ukraine increased by 2.8% over the month compared to May 2023 and by 4% m/m – to 7.7 million tons, including 26.5% y/y and 3.2% m/m in Ukraine, to 738 thousand tons.

Crude steel production



Crude steel production by region

Africa produced 1.8 Mt in May 2024, up 0.9% on May 2023. Asia and Oceania produced 122.1 Mt, up 1.6%. The EU (27) produced 11.7 Mt, up 1.8%. Europe, Other produced 3.9 Mt, up 6.2%. The Middle East produced 5.2 Mt, up 4.6%. North America produced 9.4 Mt, down 0.9%. Russia & other CIS + Ukraine produced 7.7 Mt, up 2.8%. South America produced 3.3 Mt, down 8.2%.



	May 2024 (Mt)	% change May 24/23	Jan-May 2024 (Mt)	% change Jan-May 24/23
Africa	1.8	0.9	9.2	5.4
Asia and Oceania	122.1	1.6	586.2	-0.6
EU (27)	11.7	1.8	56.1	-0.1
Europe, Other	3.9	6.2	18.6	12.4
Middle East	5.2	4.6	24.0	7.7
North America	9.4	-0.9	45.2	-3.0
Russia & other CIS + Ukraine	7.7	2.8	36.7	0.1
South America	3.3	-8.2	17.3	-1.4
Total 71 countries	165.1	1.5	793.2	-0.1



Statistics

	May 2024 (Mt)	% change May 24/23	Jan-May 2024 (Mt)	% change Jan-May 24/23
China	92.9	2.7	438.6	-1.4
India	12.2	3.5	61.9	7.7
Japan	7.2	-6.3	35.7	-2.3
United States	6.9	-1.5	33.4	-2.4
Russia	6.3 e	-0.9	30.9	-2.5
South Korea	5.2	-10.9	26.4	-6.3
Germany	3.2	-1.9	16.2	3.7
Türkiye	3.2	11.6	15.5	19.8
Iran	3.3	2.1	14.0	9.1
Brazil	2.6 e	-7.4	13.6	0.6

e – estimated. Ranking of top 10 producing countries is based on year-to-date aggregate

Passenger vehicle sales up 4%, two-wheelers 10% on-year in May: SIAM

SIAM									
Segment wise Comparative Production, Domestic Sales & Exports data for the month of May 2024									
Category Segment/Subsegment	Production			Domestic Sales			Exports		
	May			May			May		
	2023	2024	% Change	2023	2024	% Change	2023	2024	% Change
Passenger Vehicles*									
Passenger Cars	1,63,619	1,42,367	-13.0%	1,20,364	1,06,962	-11.1%	35,806	28,802	-19.6%
Utility Vehicles	1,69,179	2,13,462	26.8%	1,55,474	1,82,883	17.6%	16,274	24,490	50.5%
Vans	13,770	13,819	0.4%	12,821	10,960	-14.5%	1,157	699	-39.6%
Total Passenger Vehicles	3,45,567	3,69,648	7.0%	2,88,659	3,00,795	4.2%	53,237	53,991	1.4%
Three Wheelers									
Passenger Carrier	61,754	63,637	3.0%	38,454	45,445	18.2%	25,442	22,448	-11.8%
Goods Carrier	8,027	9,918	23.6%	7,545	8,863	17.5%	196	292	49.0%
E-Rickshaw	1,552	1,108	-28.7%	2,314	1,203	-48.0%	0	0	-
F-Cart	370	218	-41.1%	297	262	-15.2%	0	0	-
Total Three Wheelers	71,703	74,879	4.4%	48,610	55,763	14.7%	25,638	22,740	-11.3%
Two Wheelers									
Scooters	4,90,007	6,05,114	23.5%	4,46,583	5,40,866	21.1%	40,687	50,844	25.0%
Motorcycles	11,77,673	13,64,299	15.8%	9,89,120	10,38,824	5.0%	2,19,204	2,61,310	19.2%
Mopeds	38,974	41,033	5.3%	35,637	40,394	12.7%	54	264	388.9%
Total Two Wheelers	17,06,654	20,10,446	17.8%	14,71,550	16,20,084	10.1%	2,59,945	3,12,418	20.2%
Quadricycle	365	664	81.9%	35	32	-8.6%	312	656	110.3%
Grand Total	21,24,289	24,55,637	15.6%	18,08,854	19,76,674	9.3%	3,39,132	3,89,805	14.8%

* BMW, Mercedes, JLR, Tata Motors and Volvo Auto data is not available
Society of Indian Automobile Manufacturers (11/06/2024)



SIAM									
Summary Report: Cumulative Production, Domestic Sales & Exports data for the period of April-May 2024									
									Report I
(Number of Vehicles)									
Category Segment/Subsegment	Production			Domestic Sales			Exports		
	April-May			April-May			April-May		
	2023-24	2024-25	% Change	2023-24	2024-25	% Change	2023-24	2024-25	% Change
Passenger Vehicles*									
Passenger Cars	3,06,562	2,74,213	-10.5%	2,46,122	2,03,309	-17.4%	58,752	59,070	0.5%
Utility Vehicles	3,30,487	4,20,047	27.1%	3,03,479	3,62,212	19.4%	33,984	43,512	28.0%
Vans	24,691	26,678	8.0%	23,329	23,020	-1.3%	1,441	972	-32.5%
Total Passenger Vehicles	6,61,730	7,20,938	8.9%	5,72,930	5,88,541	2.7%	94,177	1,03,554	10.0%
Three Wheelers									
Passenger Carrier	1,16,489	1,25,819	8.0%	73,072	84,828	16.1%	48,439	44,807	-7.5%
Goods Carrier	14,210	19,676	38.5%	12,912	17,681	36.9%	293	414	41.3%
F-Rickshaw	3,290	2,456	-25.3%	4,905	2,611	-48.8%	-	-	-
E-Card	501	507	1.2%	616	517	-16.1%	-	-	-
Total Three Wheelers	1,34,490	1,48,458	10.4%	91,505	1,05,537	15.3%	48,732	45,221	-7.2%
Two Wheelers									
Scooters	9,86,203	11,99,808	21.7%	9,10,982	11,22,143	23.2%	90,222	1,16,718	29.4%
Motorcycles	22,23,444	26,52,362	19.7%	18,28,394	21,67,016	18.5%	4,27,856	5,15,881	20.6%
Mopeds	75,409	81,282	7.8%	70,782	82,318	16.3%	54	696	1188.9%
Total Two Wheelers	32,85,056	39,43,432	20.0%	26,10,138	33,71,477	20.0%	6,18,132	6,33,295	22.2%
Quadricycle	679	1,420	109.1%	96	51	-46.9%	608	1,320	117.1%
Grand Total	40,81,955	48,14,248	17.9%	34,74,669	40,65,606	17.0%	8,81,649	7,83,390	18.4%

* BMW, Mercedes JLR, Tata Motors and Volvo Automobiles are not available
 Society of Indian Automobile Manufacturers (11/06/2024)

SIAM												
Category & Company wise Summary Report for the month of May 2024 and Cumulative for April-May 2024												
												Report II
(Number of Vehicles)												
Category Segment/Subsegment Manufacturer	Production				Domestic Sales				Exports			
	May		April-May		May		April-May		May		April-May	
	2023	2024	2023-24	2024-25	2023	2024	2023-24	2024-25	2023	2024	2023-24	2024-25
Passenger Vehicles												
FCA India Automobiles Pvt Ltd	820	453	2,006	692	734	341	1,292	718	361	50	768	50
Force Motors Ltd	94	225	99	274	8	173	8	268	-	-	-	-
Honda Cars India Ltd	6,426	7,530	11,376	15,680	4,660	4,822	9,973	9,173	587	6,521	2,950	13,037
Hyundai Motor India Ltd	53,177	52,591	1,13,668	1,15,590	48,901	49,151	98,302	99,352	11,000	14,400	19,500	27,900
Isuzu Motors India Pvt Ltd	26	62	84	193	38	36	73	57	-	-	-	-
Kia Motors India Pvt Ltd	24,869	15,902	54,771	37,732	18,766	19,500	41,592	39,468	8,008	2,303	13,793	4,507
Mahindra & Mahindra Ltd	31,022	41,595	94,241	83,539	32,886	43,218	67,584	64,226	1,078	1,095	1,957	1,659
Maruti Suzuki India Ltd	1,76,218	1,89,967	3,20,315	3,58,289	1,43,708	1,44,002	2,81,028	2,81,954	26,287	17,241	43,121	39,205
MG Motor India Pvt Ltd	6,120	2,779	11,538	5,367	5,006	3,032	9,557	5,988	-	-	-	-
Nissan Motor India Pvt Ltd	4,814	6,653	8,215	13,436	2,818	2,211	5,235	4,815	2,013	3,993	2,648	4,632
PCA Motors Pvt. Ltd	1,929	494	2,883	1,194	806	515	1,809	919	12	638	899	881
Renault India Pvt Ltd	3,649	3,146	6,517	6,011	4,625	3,708	8,948	7,416	1,475	472	1,550	478
SkodaAuto India Pvt Ltd	4,464	2,628	8,353	5,330	3,547	2,884	7,556	5,463	183	125	327	175
Toyota Kirloskar Motor Pvt Ltd	27,577	34,960	47,823	58,228	19,869	23,928	33,285	42,604	1,031	1,314	2,378	3,108
Volkswagen India Pvt Ltd	4,362	10,666	9,842	19,133	3,286	3,273	6,318	5,222	3,222	5,839	4,488	7,842
Total Passenger Vehicles	3,45,567	3,69,648	6,61,730	7,20,938	2,86,659	3,00,795	5,72,930	5,88,541	53,237	53,991	94,177	1,03,554

SIAM												
Category & Company wise Summary Report for the month of May 2024 and Cumulative for April-May 2024												
												Report II
(Number of Vehicles)												
Category Segment/Subsegment Manufacturer	Production				Domestic Sales				Exports			
	May		April-May		May		April-May		May		April-May	
	2023	2024	2023-24	2024-25	2023	2024	2023-24	2024-25	2023	2024	2023-24	2024-25
Passenger Vehicles												
FCA India Automobiles Pvt Ltd	820	453	2,006	692	734	341	1,292	718	361	50	768	50
Force Motors Ltd	94	225	99	274	8	173	8	268	-	-	-	-
Honda Cars India Ltd	6,426	7,530	11,376	15,680	4,660	4,822	9,973	9,173	587	6,521	2,950	13,037
Hyundai Motor India Ltd	53,177	52,591	1,13,668	1,15,590	48,901	49,151	98,302	99,352	11,000	14,400	19,500	27,900
Isuzu Motors India Pvt Ltd	26	62	84	193	38	36	73	57	-	-	-	-
Kia Motors India Pvt Ltd	24,869	15,902	54,771	37,732	18,766	19,500	41,592	39,468	8,008	2,303	13,793	4,507
Mahindra & Mahindra Ltd	31,022	41,595	94,241	83,539	32,886	43,218	67,584	64,226	1,078	1,095	1,957	1,659
Maruti Suzuki India Ltd	1,76,218	1,89,967	3,20,315	3,58,289	1,43,708	1,44,002	2,81,028	2,81,954	26,287	17,241	43,121	39,205
MG Motor India Pvt Ltd	6,120	2,779	11,538	5,367	5,006	3,032	9,557	5,988	-	-	-	-
Nissan Motor India Pvt Ltd	4,814	6,653	8,215	13,436	2,818	2,211	5,235	4,815	2,013	3,993	2,648	4,632
PCA Motors Pvt. Ltd	1,929	494	2,883	1,194	806	515	1,809	919	12	638	899	881
Renault India Pvt Ltd	3,649	3,146	6,517	6,011	4,625	3,708	8,948	7,416	1,475	472	1,550	478
SkodaAuto India Pvt Ltd	4,464	2,628	8,353	5,330	3,547	2,884	7,556	5,463	183	125	327	175
Toyota Kirloskar Motor Pvt. Ltd	27,577	34,960	47,823	58,228	19,869	23,928	33,285	42,604	1,031	1,314	2,378	3,108
Volkswagen India Pvt Ltd	4,362	10,666	9,842	19,133	3,286	3,273	6,318	5,222	3,222	5,839	4,488	7,842
Total Passenger Vehicles	3,45,567	3,69,648	6,61,730	7,20,938	2,86,659	3,00,795	5,72,930	5,88,541	53,237	53,991	94,177	1,03,554



Statistics

SIAM												
Category & Company wise Summary Report for the month of May 2024 and Cumulative for April-May 2024												
												Report II
(Number of Vehicles)												
Category Segment/Subsegment Manufacturer	Production				Domestic Sales				Exports			
	May	2024	2023-24	2024-25	May	2024	2023-24	2024-25	May	2024	2023-24	2024-25
Three Wheelers												
Atul Auto Ltd	983	2,424	1,726	4,513	940	2,100	1,522	3,746	161	231	294	277
Bajaj Auto Ltd	48,360	46,467	87,619	81,974	33,555	38,715	64,838	68,829	13,550	12,438	25,203	28,108
Continental Engines Pvt Ltd	386	501	878	831	383	721	741	859	-	-	-	-
Force Motors Ltd	336	336	546	504	-	-	-	-	448	168	588	448
Mahindra & Mahindra Ltd	5,637	6,224	10,456	12,788	5,851	5,967	11,403	11,471	7	72	13	156
Piaggio Vehicles Pvt Ltd	7,122	9,661	12,778	18,432	6,530	8,152	10,035	15,828	1,470	1,315	2,739	2,351
TI Clean Mobility Pvt Ltd	51	622	80	1,192	39	600	49	1,258	-	-	-	-
TVS Motor Company Ltd	10,855	9,674	20,407	18,873	1,317	1,808	2,917	3,466	10,002	8,516	19,835	15,881
Total Three Wheelers	71,703	74,879	1,34,490	1,48,458	48,810	55,763	91,505	1,05,537	25,838	22,740	48,732	45,221
Two Wheelers												
Ather Energy Pvt. Ltd	9,742	7,882	10,927	18,006	9,670	7,023	16,416	15,873	-	-	-	40
Bajaj Auto Ltd	3,77,016	3,76,714	5,79,656	6,26,793	1,94,684	1,88,346	3,76,374	4,05,990	1,12,885	1,17,142	2,19,042	2,41,981
Chetak Technology Ltd	122	-	435	-	127	-	265	-	-	-	-	-
Hero MotoCorp Ltd	4,60,930	5,19,432	6,95,696	10,28,064	5,08,309	4,73,450	8,34,483	9,92,746	11,186	19,671	21,068	38,960
Honda Motorcycle & Scooter India Pvt Ltd	3,28,668	4,84,669	6,01,481	9,78,116	3,11,114	4,59,588	6,48,434	9,31,656	18,248	41,458	54,797	1,02,358
India Kawasaki Motors Pvt Ltd	289	238	369	310	304	362	790	743	-	-	-	-
India Yamaha Motor Pvt. Ld	75,518	68,247	1,48,057	1,70,545	53,571	64,222	1,36,510	1,27,320	18,842	17,308	35,288	37,812
Kinawa Autotech Pvt. Ltd	-	65	-	85	68	60	617	61	-	-	-	-
Piaggio Vehicles Pvt Ltd	3,930	5,748	9,236	11,260	2,601	3,250	5,581	6,367	1,457	2,430	2,903	5,450
Royal-Enfield (Unit of Eicher Motors)	82,012	87,408	1,58,026	1,83,819	70,195	63,531	1,39,616	1,38,569	6,666	7,479	10,921	14,311
Suzuki Motorcycle India Pvt Ltd	87,836	1,15,546	1,74,742	2,21,130	67,040	92,032	1,34,299	1,80,099	24,276	19,486	45,748	33,796
Triumph Motorcycles India Pvt Ltd	13	24	47	67	34	86	87	216	-	-	-	-
TVS Motor Company Ltd	3,27,736	3,74,931	6,14,142	7,25,448	2,52,690	2,71,140	4,85,646	5,72,589	66,696	88,450	1,28,435	1,61,593
Total Two Wheelers	17,06,854	20,10,448	32,85,058	39,43,432	14,71,550	16,20,084	28,10,138	33,71,477	2,59,945	3,12,418	5,18,132	6,33,295
Quadricycle												
Bajaj Auto Ltd	385	664	679	1,420	35	32	86	51	312	656	608	1,320
Total Quadricycle	365	664	679	1,420	35	32	96	51	312	656	608	1,320
Grand Total	21,24,289	24,55,637	40,81,955	48,14,248	18,08,854	18,76,674	34,74,869	40,85,606	3,38,132	3,88,605	6,81,849	7,83,390
Society of Indian Automobile Manufacturers (31/05/2024)												

SIAM												
Segment & Company wise Production, Domestic Sales & Exports Report for the month of May 2024 and Cumulative for April-May 2024												
												Report III
(Number of Vehicles)												
Category Segment/Subsegment Manufacturer	Production				Domestic Sales				Exports			
	May	2024	2023-24	2024-25	May	2024	2023-24	2024-25	May	2024	2023-24	2024-25
Passenger Vehicles												
A: Passenger Cars												
Honda Cars India Ltd	6,426	3,575	11,376	7,025	4,660	3,299	9,973	5,689	587	2,470	2,684	6,466
Hyundai Motor India Ltd	25,785	22,053	55,033	48,632	20,873	16,311	43,270	32,724	8,955	11,555	15,161	22,651
Maruti Suzuki India Ltd	1,21,684	1,05,329	2,23,003	1,97,861	84,647	78,838	1,74,709	1,48,177	20,661	7,917	32,776	21,199
MG Motor India Pvt Ltd	1,552	NA	1,552	NA	730	NA	730	NA	-	-	-	-
Nissan Motor India Pvt Ltd	1,662	2,114	1,795	5,345	-	-	-	-	1,451	2,635	2,043	3,195
Renault India Pvt Ltd	1,468	503	2,477	1,096	797	743	1,879	1,770	1,054	30	1,099	30
SkodaAuto India Pvt Ltd	2,078	1,108	3,858	2,229	1,705	1,542	3,412	2,808	9	10	9	10
Toyota Kirloskar Motor Pvt Ltd	160	112	232	286	5,321	4,639	9,037	9,788	-	-	-	-
Volkswagen India Pvt Ltd	2,904	6,973	7,295	11,739	1,631	1,610	3,112	2,793	3,059	4,185	3,980	5,498
Total A: Passenger Cars	1,83,619	1,42,367	3,06,552	2,74,213	1,20,364	1,06,952	2,48,122	2,03,309	35,806	28,802	58,752	59,070
B: Utility Vehicles												
ICVA India Automobiles Pvt Ltd	820	453	2,306	632	734	341	1,292	718	361	50	786	50
Force Motors Ltd	94	225	98	274	8	73	8	296	-	-	-	-
Honda Cars India Ltd	-	3,955	9,655	-	-	1,553	3,284	-	4,351	286	5,551	-
Hyundai Motor India Ltd	27,392	30,538	58,835	66,948	27,728	32,840	55,032	56,628	2,045	2,845	4,339	5,249
Isuzu Motors India Pvt Ltd	28	62	84	193	39	36	73	57	-	-	-	-
Kia Motors India Pvt. Ld	24,869	16,902	54,771	37,732	18,768	16,530	41,062	39,488	6,068	2,303	13,793	4,607
Mahindra & Mahindra Ltd	30,992	41,580	84,191	83,539	32,583	43,216	67,577	84,226	1,048	1,065	1,997	1,690
Maruti Suzuki India Ltd	40,794	70,831	72,871	1,31,780	46,243	54,204	82,997	1,10,757	4,503	8,635	7,954	17,074
MG Motor India Pvt Ltd	4,588	2,779	9,888	6,387	4,278	3,032	8,827	5,968	-	-	-	-
Nissan Motor India Pvt. Ltd	3,152	3,639	6,460	8,151	2,618	2,211	5,235	4,615	582	1,338	603	1,438
PCA Motors Pvt. Ltd	1,929	494	2,363	1,194	908	515	1,009	919	12	835	638	881
Renault India Pvt Ltd	2,181	2,643	4,240	4,915	3,920	2,988	7,069	5,696	42	442	451	448
SkodaAuto India Pvt Ltd	2,368	1,820	4,494	3,181	1,942	1,342	4,144	2,655	154	115	318	165
Toyota Kirloskar Motor Pvt Ltd	27,417	34,848	47,551	58,942	14,340	16,289	24,220	33,406	1,031	1,314	2,379	3,100
Volkswagen India Pvt Ltd	1,565	3,693	2,547	7,384	1,655	1,883	3,208	3,529	123	1,654	538	2,344
Total B: Utility Vehicles	1,68,178	2,13,462	3,30,487	4,20,047	1,55,474	1,82,883	3,03,479	3,62,212	16,274	24,490	33,984	43,512
C: Vans												
Mahindra & Mahindra Ltd	30	16	50	30	3	-	7	-	30	30	60	40
Maruti Suzuki India Ltd	13,740	13,804	24,841	28,648	12,918	10,980	23,922	23,020	1,127	869	1,391	832
Total C: Vans	13,770	13,819	24,891	28,678	12,921	10,980	23,929	23,020	1,157	899	1,441	872
Total Passenger Vehicles	3,45,567	3,69,648	6,61,730	7,20,938	2,88,659	3,00,795	5,72,930	5,88,541	53,237	53,991	94,177	1,03,554
NA- Not Available												

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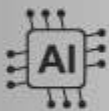
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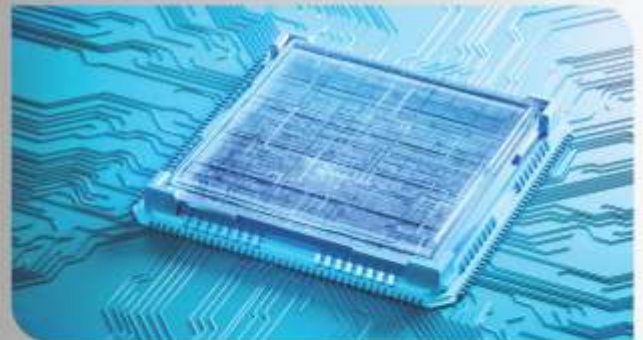
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