Kal Aaj or Kal

Stainless Steel
Yesterday Today and Tomorrow


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Contents

- Yesterday
- Today
- Application Showcase
- Tomorrow
- Indinox 2010
- Conclusions
Beet Gaya Jo Kal

…..Yesterday
India: 1978

- **Market Size**: Small
- **Domestic Production**: 18,000 MT per annum
- **Imports**: 50,000 MT per Annum (Mainly CR)
- **Local Production**: Plates, Rounds & Billets
- **Main Producers**: ASP & VISL (Both part of SAIL now)
India : 1980

Market Size
- Small but increasing

Domestic Production
- 50,000 MT per annum

Local Production
- Rounds, Billets, Plates
- Flat bar (for Re-Rolling)
- Rerolling begins at Jagadhari, Jodhpur and Delhi

New Producers
- Bihar Alloy Steel & JSL
### India : 1985

<table>
<thead>
<tr>
<th>Section</th>
<th>Details</th>
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<tbody>
<tr>
<td><strong>Market Size</strong></td>
<td>• Increasing</td>
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<tr>
<td><strong>Domestic Production</strong></td>
<td>• 102,000 MT per annum</td>
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<tr>
<td><strong>Local Production</strong></td>
<td>• Hot &amp; Cold Rolled Flat Products being produced locally</td>
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<td></td>
<td>• Patta Industry taking shape and spreads in other regions – Maharashtra &amp; Gujrat</td>
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<td><strong>New Producers</strong></td>
<td>• SALEM starting production of CR</td>
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<td><strong>India : 1990</strong></td>
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<tr>
<td><strong>Market Size</strong></td>
<td></td>
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<tr>
<td>• Increasing Sharply</td>
<td></td>
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<tr>
<td><strong>Domestic Production</strong></td>
<td></td>
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<tr>
<td>• 250,000 MT per annum</td>
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<td><strong>Roadblocks &amp; Effect</strong></td>
<td></td>
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<tr>
<td>• Ni :18,000 US $/MT, Import Duty : 55%</td>
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<tr>
<td>• Birth of 200 Series</td>
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<tr>
<td><strong>Change</strong></td>
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<tr>
<td>• <em>Creation of ISSDA – Market Development Arm of SS Industry</em></td>
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<tr>
<td><strong>Major Application</strong></td>
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<tr>
<td>• Kitchen - 85% , Prominent Grade - 304</td>
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<td><strong>New Products</strong></td>
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<tr>
<td>• Long product Production – Mukand, Panchmahal, Facor and Viraj</td>
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India : 1995

Production
- 500,000 MT per annum

Change
- India on World SS map for first time (MB Conference at Rome)

Effect
- 200 Series gaining popularity
- Kitchen still at 75%. Boost in Utensil Exports

Application Shift
- Coinage, Railways, Process Industries
## India : 2000

<table>
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<tr>
<th>Category</th>
<th>Details</th>
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<tbody>
<tr>
<td>Production</td>
<td>• 900,000 MT per annum</td>
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<tr>
<td>Change</td>
<td>• Rising Industrial Applications</td>
</tr>
<tr>
<td>Usage</td>
<td>• 200 Series fully established</td>
</tr>
<tr>
<td>Exports</td>
<td>• Flat Products to Chinese Market</td>
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<tr>
<td>Promotion</td>
<td>• ISSDA - Strong promotion of SS in ABC Sector</td>
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<td>• Use in prominent projects like Parliament Library, Apollo Tyre Headquarters etc.</td>
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India: 2005

Production: 1,400,000 MT per annum

Change: Increase in demand pattern, SS considered at material of choice, Industrial Applications increasing faster

Exports: Rising for both Long & Flat Products

Large Segment: Kitchen still at 75%, 200 Series major consumption

New Applications: Railways Coaches, Delhi Metro (DMRC)
Aaj Aur Abhi

…..Today
India: 2010

SS Production

2,000,000 MT per annum

Change

Applications
Mindset
Technology
Application Showcase
Applications - ABC
Applications – Street Furniture
Applications – Railways

Wagons & Coaches
Applications – Railways

Coaches
Applications – Metro
Applications - Arriving shortly… (India)

- Bus Body
- LPG Cylinder
- Cycle Rim
- Plumbing
- Hospital Furniture
- Water Tanks
- Modular Toilet in Trains
Applications ..... Arriving shortly (India)

Bicycle Rim & Gas Cylinder
Applications ..... Arriving shortly (India)
Applications ..... Arriving shortly (India)
Applications ..... Arriving shortly (India)
Applications ..... Arriving shortly( India )

Bus Body
Applications ..... Arriving shortly (India)
Kal Kya Hoga

.....Tomorrow
Changes we can expect

**Railway**
- Metro in major cities
- Railway Wagons
- Coach Up-gradation
- SS usage in Platforms

**Increasing ABC applications**
- Selective Rebar's
- Door & Windows
- Cladding
- Signage's
- Street Furniture
- Fasteners
- Life Style products

**India as export hub for**
- Auto Components
- Appliances
- Mill Products
- High Quality Value Added Engineering Products
What can affect ..........

- RM Price Fluctuations (Ni, Cr, Scrap)
- Grade / Series Substitution in Industry
- Standardization (e.g. Ikea/Whirlpool/Electrolux moving to 400 Series)
- New Application Development
Opportunities

• Increase in Consumption Levels / Market Size

• Increasing Downstream Applications

• New products / segments being created
Conclusions
Conclusions

Indian Stainless Steel Market

• SS Production will up to 4 Million Tons by 2015
• Double digit growth in SS Consumption (10-12%) (Growth in SS Consumption is about 1.2 Times GDP)
• New applications will emerge very fast
• Various opportunities for business
• SS will change the face of India
• The journey begins…….

32
Coming Together is Beginning
Staying Together is Progress
Working Together is Success

Lets Start .......