

# Kal Aaj or Kal

*Stainless Steel  
Yesterday Today and Tomorrow*

**Stainless Steel Fair : Indinox 2010 ( 16-19 January 2009, Ahmadabad )**

Presented by : Mr. NC Mathur

President : ISSDA

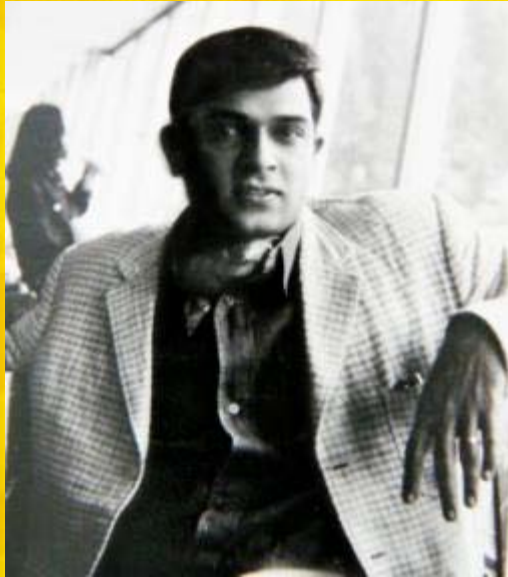
Advisor : JSL Limited



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*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*

### Market Size

- Increasing

### Domestic Production

- 102,000 MT per annum

### Local Production

- Hot & Cold Rolled Flat Products being produced locally
- Patta Industry taking shape and spreads in other regions – Maharashtra & Gujrat

### New Producers

- SALEM starting production of CR



## India : 1990

### Market Size

- Increasing Sharply

### Domestic Production

- 250,000 MT per annum

### Roadblocks & Effect

- Ni :18,000 US \$/MT, Import Duty : 55%
- Birth of 200 Series

### Change

- *Creation of ISSDA – Market Development Arm of SS Industry*

### Major Application

- Kitchen - 85% , Prominent Grade - 304

### New Products

- Long product Production – Mukand, Panchmahal, Facor and Viraj



## *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*

### Production

- 900,000 MT per annum

### Change

- Rising Industrial Applications

### Usage

- 200 Series fully established

### Exports

- Flat Products to Chinese Market

### Promotion

- ISSDA - Strong promotion of SS in ABC Sector
- Use in prominent projects like Parliament Library, Apollo Tyre Headquarters etc.



## *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

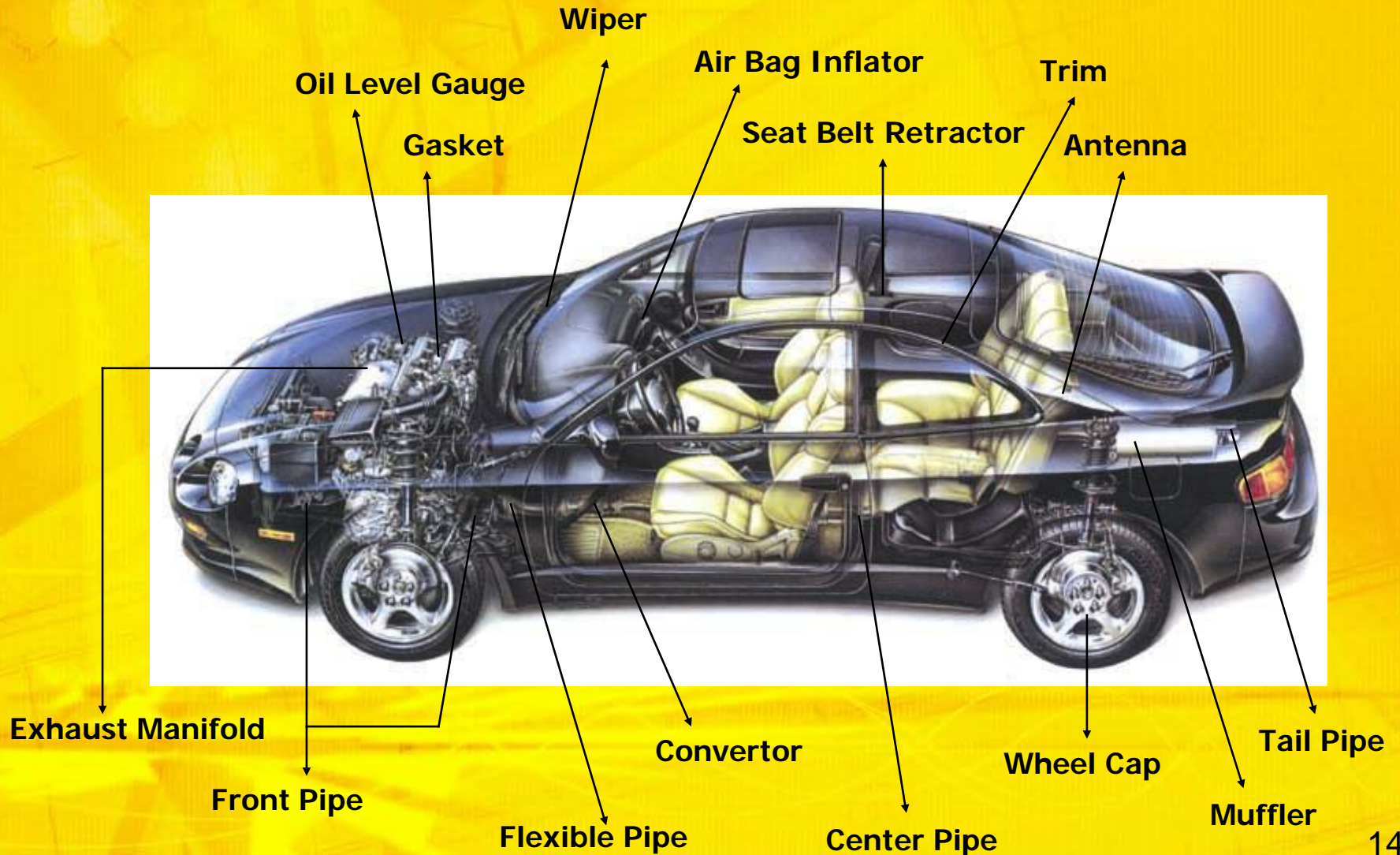
Change

Applications  
Mindset  
Technology

# Application Showcase



# Applications - Auto







## *Applications - ABC*



## *Applications – Street Furniture*





## *Applications – Railways*



**Wagons & Coaches**

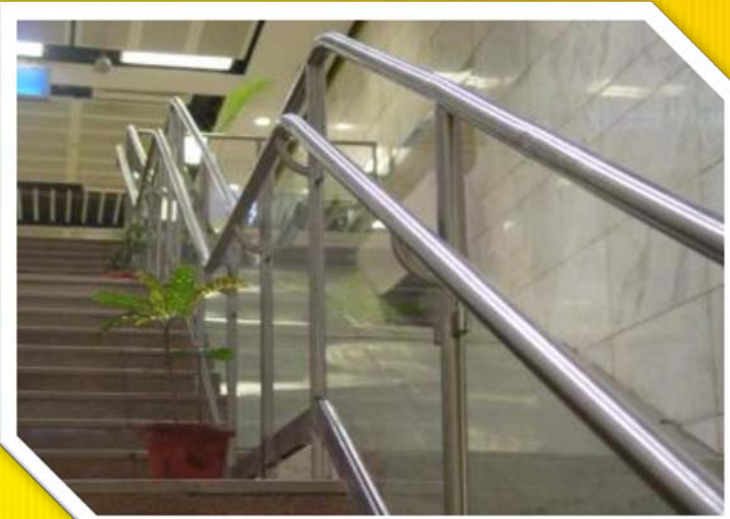


## *Applications – Railways*



**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 )*



**Plumbing**

## *Applications ..... Arriving shortly( India )*



**Storage Water Tank**



## *Applications ..... Arriving shortly( India )*



**Hospital Furniture**



## *Applications ..... Arriving shortly( India )*



**Bus Body**



## *Applications ..... Arriving shortly( India )*



**Modular Toilet in Trains**





***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.....



Coming Together is Beginning

Staying Together is Progress

Working Together is Success

Lets Start .....