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Devoted to Iron & Steel Industry

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K K Pahuja

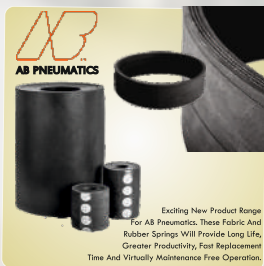
**Post Covid-19:
Stainless Steel industry
expects higher
government spending
on infrastructure**

**CARES sees rapid uptake
of digital rebar tracking**

**Post Covid-19 : Infrastructure
expenditure will be the
silver lining for steel industry**

**Post lockdown operational
strategy for DRI Plants**

**Role of steel industry in the
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the Architects**



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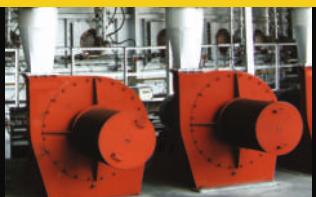
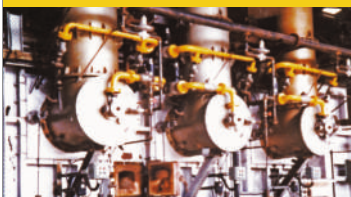
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D. A. Chandekar
Editor

Dear Readers,

During the last months many countries across the global scenario are undergoing lockdown and its pandemic situation. India too has no exception to face the reality and has set the example to managed the crisis very well to minimize the loss of human lives largely due to its tough and decisive measures.

Initially most of the governments had taken a view that life is more important than livelihood and thus all the economic activities were closed and the people were asked to stay at home. They were supposed to go out only to bring essential commodities. This went on for two months and the results are mixed.

We were able to curb the spread of the virus but not to the level that we were expecting. Slowly many started realising the harsh economic realities and they started advocating partial opening of lockdown and allowing certain economic activities with observing proper healthcare norms like sanitization, wearing masks, social distancing etc. The areas having large number of covid19 cases are still under strict lockdown. I think this doctrine is

working very well and many industries have started working at a lower capacity.

The iron & steel industry in India has also started working and is gradually increasing the production levels. The whole media is full of the stories about migrant labourers and how the industries are going to suffer because of them.

As you know, these laborers have migrated from the states like Maharashtra, Karnataka, Gujarat, Goa, Kerala etc. Which are mostly on western side of the country while most of the steel industry in the country is concentrated in the central and eastern side of the country where the availability of laborer's has increased during Covid-19.

Thus, iron & steel industry has in a way gained from this labour migration. Secondly, the demand for longs which emerges from mainly the construction activity has started climbing up. At this moment most of the sponge iron and rolling mills in central India are running at about 75 % capacity utilisation. This is extremely positive development as far as secondary steel sector is concerned. The primary integrated plants are also operating at around 50 % capacity utilization and are expected to ramp up the production level in the due course of time.

The critical issue now seems to be steel demand. Though the demand curve for longs seem to be climbing up, it is not so for the flats category. Auto sales is still minimal and exports are not that much in volume to fully compensate for the lower domestic demand of flats. If the soft loans, as mentioned in the huge stimulus package announced recently, are offered to the steel processing industry, they can survive and work hard for a better tomorrow. Further, if such a huge amount of money is coming in the country's economy, it will surely help all the industry verticals including the iron & steel industry.

With the above on the field observations, I am feeling quite optimistic about the future of iron & steel sector in the country. Of course, there are problems in some regions and with some sub-verticals but I am sure the industry can overcome them in coming months. It is suicidal to predict at this stage but I still can't resist. I feel that our industry will be mostly back on track by end of this financial year ■

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Conventional 3-section top fired transformed into Yuxing top fired with a catenary dome by cutting the top portion of the existing stove shell

Reference of Yuxing Top Fired Stove for BF with volume 40-50% of China's steel capacity since 2017 to April

Sr. No	Client	BF no	Blast volume Nm3/min
1	Hebei Zongtie Steel	1	7800
2	Hebei Zongtie Steel	2	7800
3	Hebei Zongtie Steel	3	7800
4	Hebei Zongheng Steel	3	8400
5	Hebei Zongheng Steel	4	8400
6	HBIS LaoTing	1	9700
7	HBIS LaoTing	2	9700
8	HBIS LaoTing	3	9700
9	Tangshan RuiFeng Steel	4	8000
10	Tangshan JinXi Steel		6300
11	Tangshan JinXi Steel		6300

Notes: China accounts for 50% of the world's steel capacity, and Hebei Since 2017 to the present moment, Yuxing top fired stove adoption rate Total reference nos of Yuxing top fired: 550.



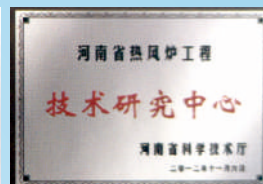
Yuxing top fired stove with a catenary dome achieved monthly mean HBT of 1314.7 oC

Low nox emission - temperature difference between dome than 83mg (international standard less than 150 mg)
from 83.5-88.9% (9-10% greater than that for other top
Long life span - Application practice has proven that the years (the lifetime of the catenary dome combustion
High HBT - Monthly mean HBT of 1314.7 oC delivered than that by other stove under same conditions)
combustion technology, the lower the better concept is



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Conventional 3-section top fired stoves for 3x2500m³ BF's converted into Yuxing 4-section top fired by cutting the top portion of the existing stove shell
over 2000m³ at Hebei Province which accounts for 2019, adoption rate of Yuxing top fired up to 84.6%.

Stove type	Blast time mins	HBT oC
Yuxing 4-section	45	1250
Yuxing 4-section	45	1250
Yuxing 4-section	45	1250
Yuxing Catenary	45	1250
Yuxing Catenary	45	1250
Yuxing 4-section	45	1250
Yuxing 4-section	45	1250
Yuxing 4-section	45	1250
Yuxing Catenary	45	1250
Yuxing 4-section	45	1250
Yuxing 4-section	45	1250

province accounts for 40-50% of China's steel capacity.
for BF's with volume over 2000m³ in Hebei reaches to 84.6%.

and HB at 30 oC approximately, nox emission less
Higher thermal efficiency - Thermal efficiency ranging
fired stove)
lifetimes of catenary dome have been in excess of 44
chamber of Yuxing stove over 30 years)
(HBT delivered by Yuxing stove is 15-20 oC higher
Lower air excess - 1.05-1.06 (Associated with
not always right)



3x3580m³ BF's configured with Yuxing 4-section top fired stoves



Internal combustion chamber stoves for 1497m³ BF at JianLong Steel converted into Yuxing top fired with a catenary dome

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JCE, Economic
Research Unit
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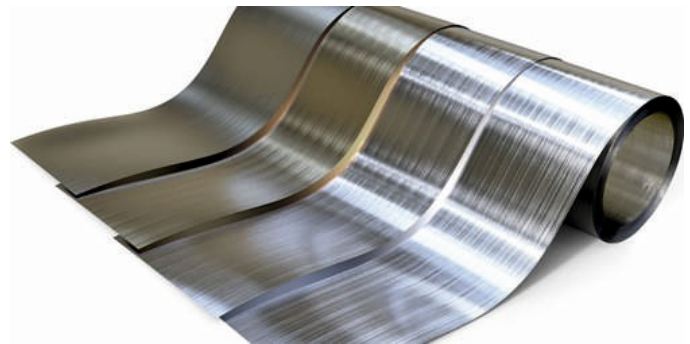
Face to Face

Post Covid-19: Stainless Steel industry expects higher government spending on infrastructure



**K K Pahuja, President,
Indian Stainless Steel
Development Association**

"We expect Government to be proactive to see that domestic manufacturing gets boost from demand revival by suitable Government policies",



Shri K KPahuja has over 40 years' experience in the Steel Industry in the areas of operations, market development and policy making.

As President of Indian Stainless-Steel Development Association, he is currently driving efforts for promotion and growth of Indian stainless-steel industry.

He has worked at Steel Authority of India Ltd. as Executive Director, where he has been part of corporate operations and involved in product development, enhancing operating efficiencies and driving growth plans of the company.

He is a mechanical engineer from BITS Pilani and MBA from FMS, Delhi University. He has been a senior assessor for CII-EXIM Bank Business Excellence Award and has been advising many companies on their journey towards excellence and change management. He is also guest faculty for Strategic Management at IIFT Delhi.

Historical Perspective of Indian Stainless-steel Industry:

India's tryst with stainless steel production started just about four decades ago, in 1978, when two plants ASP & VISL (both part of SAIL now) started producing rounds and billets. The production & usage increased when players like Bihar Alloys Steel & Jindal Strips Ltd. (now Jindal Stainless) started their production facilities in early 1980's to produce flat products. These were further used by re-rollers to produce patta for utensils market. Availability of indigenously produced flats accentuated the emergence of new facilities for re-rolling near Jagadhari, Jodhpur and Delhi.

But at the time when other developed countries started using more of stainless steels in wide variety of industrial usage, Indian end

use was still restricted to Utensils and kitchenware products, primary reason being lack in technological advancements and know how.

Another milestone was when SAIL/Salem Steel Plant started the first cold rolling unit in the country in 1985, finding end use in many architectural as well as industrial applications. This development, however, was slow, but growing demand for the use of stainless steel for utensils allowed stainless steel to bloom and spread the 'patta' industry in other regions of the country specially in the state of Gujarat and Maharashtra.

There was a serious threat to stainless steel growth during 1990 when Nickel prices increased sharply, and it touch to US\$18000/MT. Most the production was happening in grade 304 having higher Nickel content

and India being fully dependent on imports of Nickel, the growth of stainless steel was seriously hampered due to this increase in price. In 1990s, new technology of Argon Oxygen Decarburization (AOD) made it possible to replace Nickel with Nitrogen and Manganese to produce different variations of non-magnetic stainless steels,



which were ideally suited for applications where corrosion resistance requirements were moderate.

These new 200 series grades were having high strength compared to other austenitic stainless steels and had good ductility also. These were less costly and their dependency on Nickel price volatility was lower. Indian producers took advantage of this opportunity and developed many popular grades expediting the end use growth rate, especially in utensil sector.

Till now, many new producers Mukund, Panchmahal, Viraj & BRG forayed into production stainless steel catering to both flat & long products, started their production taking production of India to 4-5 Lakh tons per annum in the nineties.

Although stainless steel industry was growing at a very steady rate in the country but, till 1989-90, more than 90 % of use was still in kitchen and related applications. Meanwhile, western and other developing countries started using stainless steel in more and more applications such as rail coaches, tankers for carrying liquids, pipelines for carrying oil, gas, liquids including potable water, various products for architecture, building & construction and other

Infrastructure applications. A need was, therefore, felt by the industry to create an organization to promote and diversify the use of stainless steel in India.

Accordingly, Indian Stainless-Steel Development Association (ISSDA) was formally born in November 1989 as non-profit organization, after extensive deliberations and taking into confidence key manufacturers (seven producers) of stainless steel at that time. The primary objective of ISSDA is to create awareness for Stainless Steel usage & support in diversifying the use of Stainless Steel in different sectors as per the global applications.

ISSDA has joined hands with the domestic producers to initiate training & education programs for different industries along with promotional activities. The one of the important aspects of Stainless-Steel properties is its lifecycle cost analysis and people must be aware about this concept & ISSDA has taken this initiative to make industry stakeholders aware since if widely used the life cycle cost will result in long term value. In the last two decades, stainless steel has undergone a tremendous change in perception and production volumes in India. ISSDA has been successful in creating the awareness

and changed the perception on stainless steel being seen as a material good only for kitchenware, it is now seen as an engineering material of choice that lasts for decades and gives value for money.

Today we see diversified use of stainless steel not only in Railways & Metro Rail Coaches, Wagons, tankers, various products for building & construction & process Industry but also in sectors such as nuclear, Power, Oil & gas, where high quality & grades that are used are indigenously produced. As a result of these efforts, India emerged as second largest producer and consumer of stainless steel in the world in 2016. The industry has reached a pre-covid19 production level of nearly 4 million tonnes per annum, an eight-fold increase in last 25 years, a CAGR of 8-9%.

How is present situation in stainless steel industry?

As you know, the MHA permission to start industrial units was given in second week of May 2020. After that, stainless steel plants have been interacting with local authorities to set up the safety and operational procedures. Almost all Stainless-steel units have taken steps towards resuming operations. Indian Stainless-steel industry is diversified with some large units, many MSMEs, consisting of induction furnaces, re-rollers (patta)



Face to Face

units and downstream units making stainless steel products.

Large producers have started melting and executing available export and domestic orders from OEMs etc., but level of operations was not up to the expectation and it was going low. However, smaller, and downstream industry such as pipes & tubes, utensils & kitchenware are finding it difficult to start for lack of sufficient orders. Each one of us has its own set of challenges, but many market related issues are common because ultimately, all of them are part of the same supply chain.

What are the hurdles in getting the industry back on tracks after the lockdown is lifted?

After lifting of lockdown, the foremost issue was reassuring the work force by suitable steps on health and safety. The industry has worked out protocols on health, hygiene, sanitization, and social distancing in accordance with Government guidelines. Availability of labour is also an issue in many places, where second wave of migration seems to on after resumption of train services.

Second most important issue is to fully restore supply chains, which is underway. Third issue is revival of the market demand. Here I will divide

the problem in two parts- retail demand and institutional demand. The retail markets have started opening but footfalls are low but picking up. The institutional demand pick-up is largely dependent on Government actions on demand stimulus.

The stimulus package announced so far largely addresses the supply side issues. The demand side actions on higher government spending on infrastructure etc. are awaited. Meanwhile, we may have some demand from OEMs and ongoing projects, which has to be followed up shortly.

What support do you expect from the Government?

The Government and RBI have announced certain measures, which address liquidity as well as policy reforms. This will greatly help the stainless-steel units to revive operations. However, industry, particularly MSMEs, require more support to come out the present difficult situation. Firstly, all dues from government and PSUs to the industry should be released immediately.

Secondly, government should expedite infrastructure spending to the first half of the year itself to generate demand. A section of the industry is reluctant to avail of the credit facilities unless there is clear demand visibility to ramp up

production. Thirdly, the MSME sector is looking for greater support in terms of meeting idle fixed costs during the lockdown period. Lastly, our industry is easy target of high quantity of imports, which may aggravate further due to covid19 related global turmoil. So, we expect Government to be proactive to see that domestic manufacturing gets boost from demand revival by suitable Government policies.

By when do you think industry will be back on track?

We are optimistic about the market revival considering our robust consumption demand, which will pick up sooner than later. But there are still many unknowns about how the virus will manifest itself, how far are we from a cure or a vaccine? So, we cannot say at present whether we will have a V shaped or a U-shaped recovery.

It is, therefore, difficult to lay a definite time frame about when we will achieve full normalcy. All I can say is that green shoots are visible, and we will only go towards higher level of production and consumption from here. Some definite trends will be visible in next 2-3 months and hopefully, second half of the financial year should be satisfactory. ■



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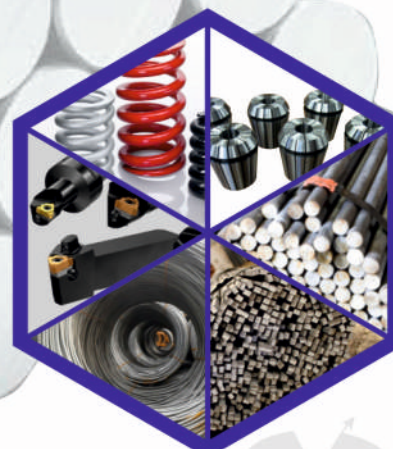
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CARES sees rapid uptake of digital rebar tracking

"CARES delivers rebar assessment and audit in over 40 markets around the world which are being conducted remotely. Therefore, the need for effective digital tracking solutions has never been more urgent",
Lee Brankley, Chief Executive Officer, CARES

CARES is an independent not-for-profit certification body, established in 1983 to provide confidence to the users, purchasers and specifiers of constructional steels through a regime of regulation, testing and inspection.

It operates for the benefit of the steel and construction industry offering certification schemes for companies that produce materials, components or offer services, primarily to the reinforced concrete industry.

This means that, at a reinforcement fabricator, any steel from a CARES approved manufacturer can be used within any given 'bar mark', with no further testing required. This provides an often overlooked benefit to the construction industry; that of the efficient use of reinforcing steel and the maximisation of steel utilisation, leading to reduced wastage as well reduced cost whilst maintaining product integrity.

One rare positive result of the Corona virus pandemic is



Lee Brankley,
Chief Executive Officer,
CARES

set to be a restoration of high levels of trust in the provenance of safety critical steel products, according to CARES.

To maintain the trust, confidence and high standards in the market during the current pandemic, CARES announced on 21st April that all assessment of scheme compliance and ongoing certification of approved companies would be conducted utilising remote auditing techniques. This step was taken to



Feature

ensure the health and safety of CARES assessors and client personnel.

The organisation has seen a rapid pick-up in its digitisation offer as an indicator of a "... quite sudden unintended consequence" of the current crisis.

CARES launched its associated App just as the first cases of Covid-19 were being picked up in Wuhan. Since then take-up of the CARES Cloud digital platform has accelerated rapidly. With almost all its certification activities now being conducted remotely, the need for effective digital tracking solutions has never been more urgent, says Chief Executive Officer Lee Brankley. CARES delivers rebar assessment and audit in over 40 markets around the world.

"Product provenance was starting to become a live issue among main contractors and consultants even before the pandemic, particularly as a result of fake data scandals we saw in various markets. But it has now suddenly become a critical factor across the supply chain," Brankley adds. "People are looking for certainty through digital solutions. The introduction of remote assessment techniques has driven that demand to a new level," the CEO continued.

Price, quality and availability were the sole drivers of the rebar market for decades. There has however been a "... significant shift" with sustainability and digitisation sitting alongside market price as the new top three

priorities, CARES says. Product performance is readily captured through a digital record which instantly verifies material and manufacturing data linked to a particular mill.

The positive outcome for procurers on major projects is product transparency through a digital, hand-held scan of materials entering the supply chain. "Concerns around the paper trail evaporate which rebuilds confidence in the provenance of the products people are sourcing," Brankley adds. "It is an unintended consequence of the crisis we are all working through now, but one which may well bring some long-term benefits in terms of certainty and trust."



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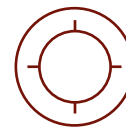
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Post Covid-19 : Infrastructure expenditure will be the silver lining for steel industry

“Indian steel producers to look for value added exports market value added product along with Government Infrastructure expenditure will enhance the domestic steel demand and also help to utilise the maximum capacity”

Sometime in November 2019, in the Chinese city of Wuhan, a silent infectious disease was reported. It was only on Dec 31st 2019 that the WHO was informed and by then several thousands of people had come and left from Wuhan. It was only in late January 2020 that it was given the status of a pandemic.

The disease was given the name Covid-19 and since has rapidly affected every country in the world. India announced a lockdown in the third week of March 2020 in order to reduce the spread and in order to

prepare the health system to cope with the crisis. The lockdown has since continued till today (31st May 2020) and likely to continue for some more time albeit with some relaxation.

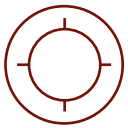
Every industry and commercial undertaking and their supply chains have been affected even including the pharma industry and the health care system.

Unfortunately, lockdowns have very serious side effects and that meant the closure of the markets that the steel industry serves and of much of the steel industry. Most public and private



Jayant Sathaye
Consultant

construction stopped completely. The automobile, domestic appliance, e-commerce, entertainment, tourism, restaurant, domestic services and most of the transport businesses came to a complete halt. The IT and ITes and some service businesses could continue with their employees working from home. However, nearly 40 crore workers remained without work. The migrant labour among them gave up hoping for continued work and income and decided to go home by hook or by crook. This has now become



In-Focus

a great tragedy.

Post third lockdown period, industry activities was permitted in some areas and the economy is just beginning to wake up. However, unfortunately, much of the bureaucracy has forgotten that the lockdown was just an enable for preparation of the medical system and is behaving as if the lockdown can stop the spread of the disease.

How the Government and the bureaucracy proceed will determine how long the recovery will take. Hopefully they will now concentrate on regulating and publicising what people must wear and how people must behave in public, in the offices, in transport vehicles and in the markets.

In order to understand the effect on the steel industry, one must examine what happens to the final consumers of steel, the people. Today, it seems as if some segments have learned to cope with lockdown. Others have not.

In the recent past, the workers in the IT industry has been the driving force for the economy. In this lockdown, much of the IT and services businesses have learnt that it is quite feasible to work from home and in fact many companies are working out plans to have only 20% attendance in the offices and rest could

work from home. This has serious implications.

It saves the IT businesses rent and the need to transport their employees over long distances. Employees could work from anywhere and in fact can even work from tier 2 towns as long as broadband connectivity is not the issue. The demand for office space and on the real estate industry could be significantly lower. If, as expected, there is a reduction in demand for IT due to recessionary conditions in the US and other primary markets, the demand for commercial real estate could drastically fall. If there are job losses in this sector, there will be loss of demand even for housing. It is not as if the demand will disappear, but since the land prices have not fallen, much real estate is unaffordable and the demand will remain pent-up. Already it has been seen that most builders are concentrating on "affordable housing" which simply seems to mean smaller dwelling units.

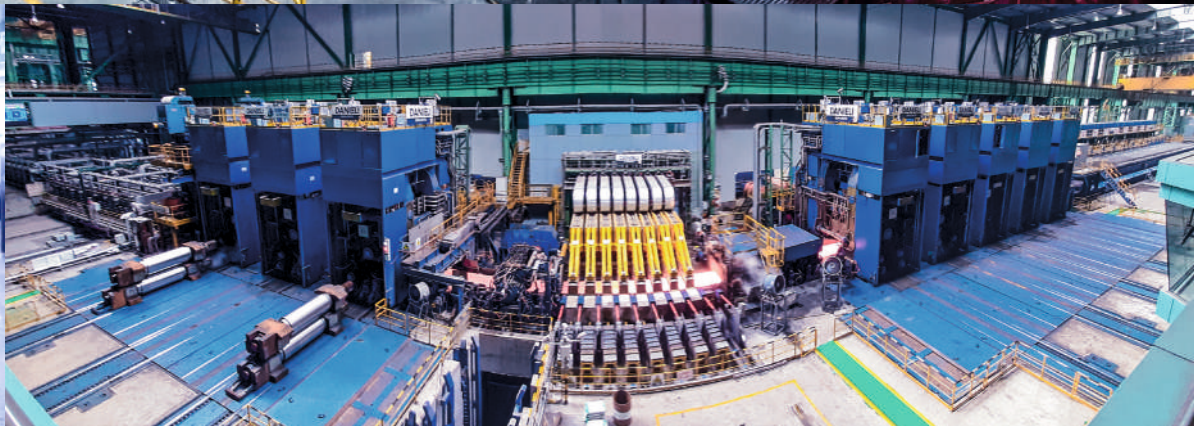
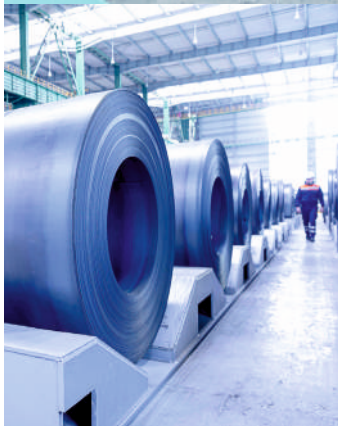
There is significant demand for coaching classes in India (due to the failure of the formal educational system) and these coaches have suddenly realised that they can conduct classes using new video conference systems (which can handle

up to 100 users).

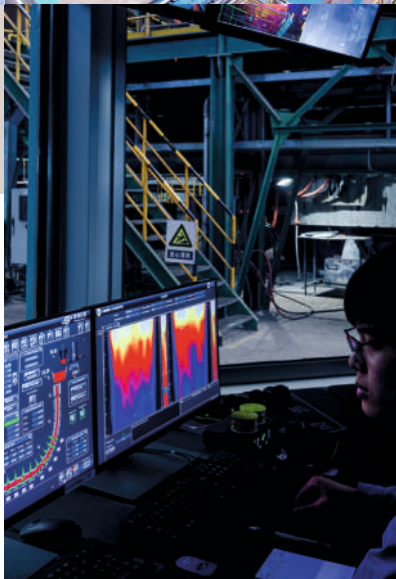
This means that students do not have to rush from class to class on their 2 wheelers and can save time and money by attending from home. There is bound to be an increase in demand for broadband services and fall in demand for 2 wheelers and petrol/diesel. In fact, if this is taken further the formal classes can also be taken from home using NCERT or UGC approved streaming services and the schools/colleges need to be attended only for clearing of doubts and for practicals.

This can solve the huge problem of poor-quality education in our schools and colleges. (Unfortunately, many students cannot afford the broadband devices or services and government may have to make an effort to subsidise this.) What is of interest is that the demand for 2 wheelers will reduce since the richer students who normally take such classes need not travel.

The entertainment service businesses such as cinema, malls, weekend dining, travel and tourism, are badly hit and will likely not recover till the general population gets herd immunity. This herd immunity is unlikely to happen till, possibly, a year has passed and recovery of these businesses can happen only then. The workers in these businesses



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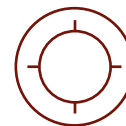
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will have a sharp drop in employability and naturally not participate in the economy. Many of these will have to find other modes of employment. This is bad news for the north east states.

A similar problem exists

a serious recession, it is unlikely that orders will flow to India. It seems that unless IT orders develop domestically; a number of IT service workers will remain unemployed and as explained earlier will result in recessionary trends in India.

which actually constitute projects that can make India an efficient country) in order that the steel consumption becomes 50% of the total, the cascading effect will increase employment and once those employed spend to improve their lives, one



can see recovery happening.

This is, probably, the only way for a quick recovery. History, of course, shows that

with travel for pilgrimages. However, pilgrims normally will travel if government permits. Hence this part of the travel and tourism industry will recover faster.

What appears to be clear that the loss of business and employment will reduce demand for homes, appliances and equipment for homes and personal transport vehicles. The dependent manufacturing industries had already slowed down before this crisis and this will continue leading to a drop of steel demand.

The most serious issue is what happens to IT service orders from North America, Europe and Japan. If there is

The only silver lining seems to be infrastructure expenditure which is likely to continue. Railways, Metro, roads, bridges, ports, airports, water supply, expansion of Broadband service, power generation including solar energy, power transmission and distribution, GST backbone expansion, municipal waste handling systems all will continue to be built and the Government will have to spend on these even if it busts the deficit target. Unfortunately, this probably consists of only 30% of the steel consumption in the country.

If the Government can find the funds and expand these (

such policy initiatives are dashed because of land purchase delays, bureaucratic lethargy, obfuscation and delays.

Unfortunately, the repetition of history is more likely than otherwise and it is possible that there will be a lot of infructuous expenditure.

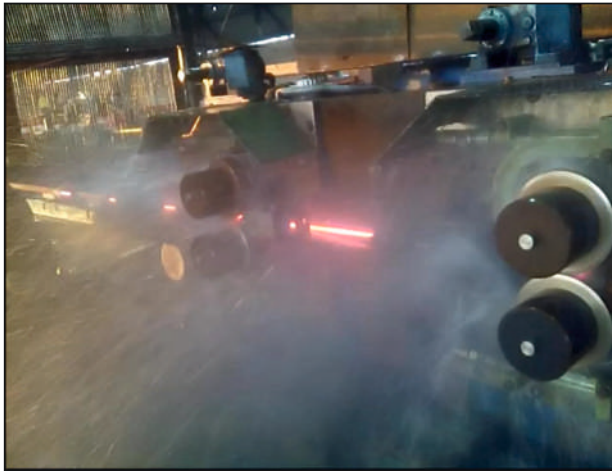
What does all this mean finally? I continue to hope for the best but I am sorry to be pessimistic and it is more probable that there will be insignificant increase in demand and steel producers will have to look at exports in order to keep their plants busy. Domestic recovery will not occur quickly and may well take over two years. ■

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Pradip Kumar Tripathi takes charge as Steel Secretary



Shri Pradip Kumar Tripathi, Senior IAS officer took over the charge as Secretary in the Ministry of Steel with effect from 1st

June, according to an official statement.

Mr. Tripathi succeeds Binoy Kumar, who superannuated on May 31, 2020.

"Pradip Kumar Tripathi, IAS has taken over as Secretary, Ministry of Steel," the Steel Ministry said in a statement.

Prior to this, Shri Tripathi had been posted as a Special Secretary and Establishment Officer in Department of Personnel and Training (DoPT).

Steelworld Editorial team heartily welcome to Shri Pradip Kumar Tripathi.

Implementation of big ticket infra projects to shoot up steel demand: RINL CMD



The outbreak of COVID-19 pandemic followed by the lockdown has impacted production, sales and dispatch of steel in India,

Rashtriya Ispat Nigam Ltd (RINL) CMD P K Rath told PTI. The implementation of big ticket infrastructure projects will lead to a sharp jump in steel demand, which has taken a hit due to COVID-19 pandemic, a top RINL official said.

The slowdown in industries like construction, auto and infrastructure, which together consume about 80 per cent of steel production, during the lockdown led to a slump in demand of steel in the country and as a result inventory levels have increased, he said. Steel demand contracted by about 6-7 per cent in the financial ended March 31, 2020, he added.

SAIL turns to exports as debt piles up



Steel Authority of India (SAIL), the public sector steel behemoth, is now turning to exports to replace a missing

domestic market. SAIL has traditionally depended almost exclusively on domestic demand for sales. But it entered the lockdown with built-up inventory of 2 million tonnes of steel and the company has been finding new buyers overseas this year to clear stock.

SAIL produced 16.15 million tonnes (mt) of steel in FY20, highest among all Indian producers. The 1.18 mt that is exported last year, although only a fraction of total production, was its highest ever. In the first two months of this fiscal, however, SAIL ramped up exports and built new customer relationships abroad, especially in China, Vietnam and Southeast Asia.

"We're seeing some construction projects start again and some governments, like Telangana, are encouraging work restarting as revealed by Anil Kumar Chaudhary, Chairman, SAIL. They've started booking demand for steel and cement. Many auto companies like Hyundai, Maruti have started production and Ashok Leyland is talking of starting production very soon. We are also supplying 1-1.5 lakh tonnes of steel to railways every month and these despatches happened through the lockdown."

RINL-VSP launches new billets

The Medium Merchant Structural Mill (MMSM) of the RINL-Visakhapatnam Steel Plant has for the first time rolled out 125x125mm billets by modifying its roll stands to meet the increasing demand.

This is a new addition to the RINL product basket to meet the demand of both domestic and international market. RINL produces special steel,

including wire rod coils, rounds and billets of different grades and dimensions to meet the demand of infrastructure, construction and auto industry.

Earlier, MMSM rolled out billets with a maximum size of 90x90 mm. Trial operations were carried out successfully for IS:2830 grade. Other grades can be rolled out depending on the requirement.



Dilip Oommen becomes a new President of Indian Steel Association

Shri Dilip Oommen, CEO, Arcelor Mittal Nippon Steel India (AM/NS India) has taken over as President of the Indian Steel Association (ISA). He was unanimously appointed for the next two years tenure.

Shri Oommen's appointment comes in the wake of the recent resignation of T. V. Narendran managing director of Tata Steel from the position of President, ISA.

Oommen, a veteran of the steel industry with more than 37 years of experience, is an alumnus of Indian Institute of Technology, Kharagpur.

Apart from Narendran, past presidents of ISA include Sajjan Jindal, Chairman JSW Group, and C S Verma former chairman of SAIL.



and small commercial vehicles (SCVs), followed by two-wheelers, he said.

"Financiers are more confident in cars and SCV ... as they relook credit norms for all segments. There is negligible demand for heavy trucks as of now," Kale added.

Passenger vehicle demand may drop by a quarter in FY21: ICRA

Domestic passenger vehicle demand may decline by almost a quarter in the current fiscal as against earlier projections of a 10-12 per cent drop due to multiple lockdowns, ratings agency ICRA said.

ICRA in a note also said it continues to have 'negative' outlook on the passenger vehicle (PV) industry since the second quarter of the previous fiscal FY2020 but it can turn to stable from negative if demand environment improves on a consistent basis over the next 12-18 months.

"As per ICRA note, the PV passenger demand is now estimated to decline by 22 per cent to 25 per cent in FY2021, as against earlier estimated volume decline of 10-12 per cent in FY2021, post-Lockdown 1.0. The expectation then was that normalcy would return by the second week of May," it said.

However, multiple lockdown extensions are having a direct bearing on the economic environment and consumer sentiments. The rapid spread of COVID-19 across the region and consequent lockdown extension has wiped off volume during the first two months (April-May) of the current fiscal, ICRA said.

Passenger vehicle sales crash to decades low in May



India's passenger vehicle sales slumped to their lowest in decades last month, as limited production amid disruptions in supplies, shortage of labour and a weak market on the back of the Covid-19 pandemic and the lockdown hit dispatches from factories.

Industry estimates put wholesale numbers of passenger vehicles at 37,000 in the local market in May, an 85% fall from a year earlier. In April, production as well as dispatches had come to a complete halt due to the nationwide lockdown imposed to check the spread of the coronavirus pandemic.

Retail sales last month fared better than wholesale numbers, claimed several manufacturers, helping align inventory in the channel. Market sentiment though is expected to remain tepid next couple of months, with some recovery expected only around the festive season towards the end of the calendar year.

Automakers in India report wholesale dispatches from factories and not retail sales made to customers. By the end of May, about half the retail outlets and 80% of workshops had reopened after remaining closed from late March when the lockdown was clamped. "The response for new sales is very low as of now although fresh bookings have started," Federation of Automotive Dealers Association president Ashish Kale said. Most of the deliveries happening now are of vehicles booked before the lockdown, while new demand is mostly for cars



News Round Up - Indian

JSW Steel to focus more on Exports due to domestic weak demand



JSW Steel, India's largest steelmaker will focus on exports, cut costs and delay expansions as the corona virus pandemic slashes demand at home. Once a bright spot for global demand, steel consumption in India plunged 91% last month while crude steel output tumbled 70% as a nationwide lockdown to combat the pandemic halted activity across industries.

"We expect recovery in India's demand will be gradual and may only gather pace in the second half of the year started April as the industry is facing shortages of labor, logistics and liquidity" Shri Seshagiri Rao, Joint MD, JSW Steel Ltd.. With India's steel consumption forecast to decline by 10% this financial year, the steel mill will focus on exports for at least the next six months, he said.

A drop in local iron ore prices and imported coking coal rates, together with a weaker Indian currency will make exports more competitive, he said. Owned by tycoon Sajjan Jindal, the steel mill plans to export more than the 3.1 million tons of value-added products it shipped out last year, to countries in Asia, the Middle East and Africa. JSW Steel, which operated its plants at 38% capacity in April, has now ramped up capacity to 85% this month and aims to produce 16 million tons of crude steel this year. The company, which last week posted an 85% plunge in its January-March quarterly profit, has identified key areas for reducing costs and deferred the doubling of capacity at its Maharashtra plant by half a year. It has also put on hold a \$150 million modernization plan for its U.S. plate and pipe mill.

Tata Steel honours all job offer to new hires

Tata Steel has decided to honour all job offers made to new hires. The steel major has conducted online on-boarding of 96 officers, including management trainees over the months of April and May. The company is expecting about 25 more lateral hires at the officer level to join in June.

The company has also on-boarded 76 interns for various of its projects from leading business schools, and about 90 technical interns will be joining over the next few weeks.

"We have ensured that all the candidates that accepted their offers for jobs were on-boarded on the date committed to them," said Suresh Tripathi, vice president – human

resources at Tata Steel.

The steel behemoth has invested in shifting from classroom methodologies to blended learning mechanisms for orientation and induction of new joinees, as the ongoing Covid 19 pandemic has prompted majority of its workforce to function remotely.

"The entire induction program is being conducted digitally," said Tripathi. Every new joiner undergoes one day of orientation module followed by an induction programme which includes multiple sessions via webinars conducted by senior leadership. The leadership team from respective functions will interact with the new joiners on a regular basis via online sessions, he said.

India's steel output declines by 65 pc :WSO



India's crude steel output declined by 65 percent to 3.13 million tonnes in April 2020, as per the recent press released by the World Steel Association on May 24, 2020. In comparison, the report stated that India had produced 9.02 million tonnes of steel in April 2019.

India's steel output in March 2020 declined by 14 percent in comparison to March 2019. This decline comes amid the nationwide lockdown imposed on March 25, 2020 to contain the spread of COVID-19 pandemic in India.

The complete lockdown brought a halt to all economic activities, besides essential services, which impacted the production, demand and supply of steel in India.

The global steel output was also impacted by the corona virus outbreak with lockdowns imposed in the majority of the nations across the world to tackle the deadly virus infection.

As per the World Steel report, the global steel output declined by 13 percent, from 157.67 million tonnes in April 2019 to 137.09 million tonnes in April 2020.

China had reported a 1.7 percent fall in its steel output in March 2020 at 78.97 million tonnes. The nation has, however, started showing growth in its production. China is the largest crude steel producer in the world, accounting for more than 51 percent of the global steel output. The nation produced 85.03 MT steel in April 2020, which marks a marginal rise of 0.2 percent as compared to 84.87 MT in April 2019.

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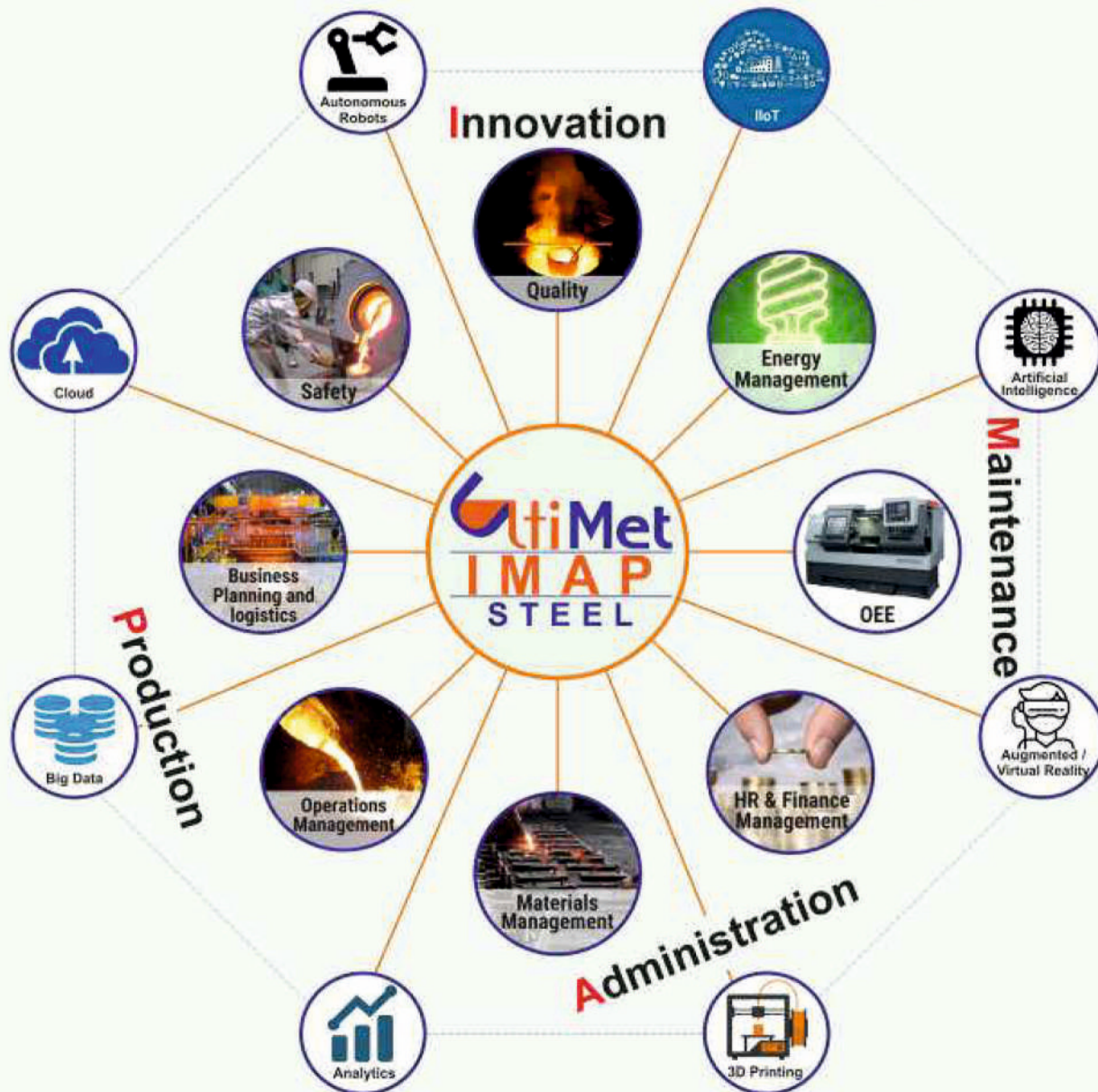
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Post lockdown operational strategy for DRI Plants

As we have witnessed the COVID-19 pandemic sweeps across the India and global market which has created a significant operational challenges for the manufacturing plants. Some companies have temporarily shuttered factories in response to government restrictions or falling demand from the end-user like infrastructure and construction projects. As a result, Steel companies across the country are facing troubling times as

production continues but off take has fallen drastically.

Steel plants is being categorized as an essential commodity, the steel companies are continuing production during the lockdown period. But there is hardly any off take as construction activities are at a standstill. Plant capacity utilization is much lower than usual, but whatever production is happening is just building up the inventory.

While at the same time, DRI plants owners are strictly following the safety



D P Deshpande
Consultant

and distancing measures to keep the workers safe which are the biggest assets while preparing for the uncertain times. During this tough time, lot of migrant workers travelled to their home town.

Subsequently the actual realization started to dawn that lockdowns can at best be a stopgap solution to the problem. All industry owners wanted their employees to report to work to start a plant. Generally, the DRI plants employ local labour and therefore it was not much difficult to organize it.



Analysis

Generally, a factory employee are the ones at risk and more prone to getting sick due to the pandemic and looking after their health also becomes the first responsibility of the employer. In fact the very first prescription shall be to assume responsibility/take measures to protect the health of the people from the pandemic, as one starts the plants.

1. Masks and replacement masks ought to be provided and used all the time. Train uninitiated employees in use of masks, explaining them why. Good to have a policy by the employers, "No masks no work".

2. Social distancing at all times. Whether it is unloading a wagon or a truck, handing a bucketful material to another person to carry elsewhere, or reporting/discussing /meeting. This would need specific supervision to start with.

3. Apart from frequent washing of hands by the employees, sanitising the tools, the panels, the keyboards, the log books, the monitors is critical. Running water, soap and sanitizers must be made available at many locations

It is difficult to enforce simple things like this. We have seen it at the National level.

So additional and continuous efforts are required.

Managements can draw upon their experience of implementation of safety practices. Telling it once or training people once would be insufficient. So it would be advisable to deploy/ employ one full time person for this supervision. If he is an internal supervisor...let us call him the health inspector.... who is deputed for this purpose, it is the best. Two or three people reporting sickness would create a fear and absenteeism.

There would be requirements on upkeep and social distancing in the canteen, at the security gate, or in the washrooms. Such a practice along with regular sanitizing /disinfecting these places would have its own dividends. A discipline needs to be instilled that the employees do not leave the plant premises during the work hours.

It is also necessary to distance the "non employees" such as truck drivers, supplier's representatives, etc. The health inspector could use the opportunity also to educate and make such non-employees aware of the Covid 19 precautions. Limited period offers to them to avail food from the canteen would also go a long way.

Depending on the company's policies, it would be ideal if the employees could be tested for the virus, say once in two weeks. It is an additional expense to the company. But it is like an act of the employees up porter operations insurance. Also it would establish itself as a good practice in the industry. The tastings could be set up as a reward for achieving something that was not achieved before.

The HR office of the company also could ensure that the employees are made aware of and are availing the benefit schemes of the government policies, be it PF deductions, PF loans, PM Kisan schemes, etc.

All of the above are hygiene items. And the pandemic shall be quite "punishing" to unhygienic conditions at workplace. If there was a simple lockdown and no pandemic, the steps suggested above would have been unnecessary. But steps that follow would have to be taken.

Managements have suffered due to lockdown of facilities as their cash flows have got interrupted, The surpluses that businesses would have generated in the lockdown periods have not been accrued.. An accountant would explain the cash flow map. Management needs people,



raw materials, plant maintenance, purchased power, mobile equipment's, diesel, and all of them need money. Cash flows of an ongoing business were paused by the lockdown. Restarting would need cash. This is the first requirement. An estimation of this requirement helps in its arrangement and no further surprises. The estimate would need to take into account the cash difficulties that the paying customer would also be facing and some delays on account of that need to be factored into. If they are anticipated well, the businesses can delay his payments also by arrangement. And the pressures of managing cash would reduce. This is simple but if it is not managed well, can dent the reputation of the business in its operating circle. Vice versa.

A large factor in sustaining the operations will depend upon the continuity of demand and the customers. It would be imprudent to produce to stock. If full production can't be sustained, it is an ideal time to consume away the dead stock of raw materials, it is a good time to try out reduction in specific coal consumptions. Many companies use this slack time to upgrade/repair the plant equipment's, especially those jobs which do not

require expensive refurbishment, but only downtime. These times are also times when prices can be volatile and therefore it is prudent to run with low stocks.

Iron ore or pellet availability was perceived to be an unpredictable factor because of mines auctions and change of guard at iron ore mines. But it is not so uncertain now. Although iron ore prices are high, the imported coal from South Africa has also gone low in price and is helping on DRI competitiveness. So, if you have liquidity and have customer then the plants would kick off smoothly.

One would imagine some difficulties to get supplies of maintenance and operational consumables from the market. Free movement of vehicles for emergency supplies could also be a problem.

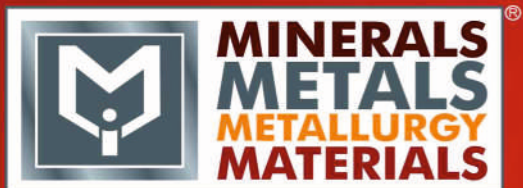
The CSR efforts could be directed to the surrounding localities in training or in issue of soaps, masks, sanitizers etc. companies could give sample, input material and seek some paid service to stitch and supply masks.

How the times would unfold themselves would dictate the strategies to the plants. No one knows for sure, but a shorter term prediction is possible and with a few assumptions

about the extent of spread of Virus would allow us to extrapolate it further.

The government appears to be proactive and is committing large money for infrastructure projects. Some reports say that 60% of projects have seen mobilization of resources. The government projects will also pay with speed as a policy. This augurs well for the steel industry. The private investments like housing would drag a little before they start. To that extent, the demand would get pulled down for some time. But the Government projects would be sufficient to kick off a critical demand that ensures stable operations, even if on a lower scale, for a quarter or so.

The Covid 19 infections are yet to peak. Some reports say that it will find a peak in July. Until then, the risks of uncertainty of critical employee availability would stay and needs to be managed well. ■



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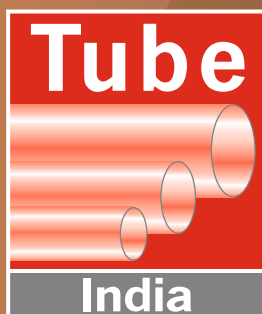
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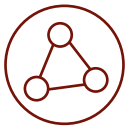
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China's steel PMI rises further in May



China's steel sector purchasing managers' index (PMI) rose above the key level of 50 in May, indicating a continued recovery in the steel industry during the month, the China steel logistics professionals committee (CSLPC) said.

The steel PMI increased by five points from April to 50.9, rising above the level of 50 that indicates an expansion.

Sub-indexes showed both steel production and demand rising in May, lifting the pace of destocking for steel and raw materials. Prices for raw materials jumped substantially while industry employment was stable. Steel production growth is likely to ease in line with relatively slower steel demand in June, but feedstock prices may stay at a high level, the CSLPC forecasted.

The steel PMI's sub-index for new domestic orders jumped by 13 points to 52.9 on accelerated investment in infrastructure and the resumption of large-scale steel enterprises. The export orders index was at 31.9, up slightly from April's 27.8 but remaining below 40 for a third consecutive month because of weak overseas demand during the Covid-19 epidemic.

The steel production sub-index jumped by 3 points from a month earlier to 56.4. China iron and steel association (Cisa) data showed steel output at its key member mills averaged 2.1mn t/d in May, up by 6.39pc on the month and higher by 1.18pc on a year earlier.

Finished product inventories fell quickly at mills as downstream demand resumed, with the inventory sub-index dropping by 9.6 points to 29.2 in May, CSLPC said.

The sharp rise in raw material prices in May was the result of stronger demand and tight supply of imports, as overseas suppliers were hit by the pandemic and port maintenance. The higher prices are pressuring steelmakers' margins, CSLPC said. Steel demand may fall as the offseason starts in June, while steel production is unlikely to increase further given environmental restrictions, it said.

Imports of iron ore will stay low if Brazil does not manage to control the coronavirus outbreak in June, which will push up iron ore prices and the production costs for steel enterprises, CSLPC said.

Iron ore slips after 3-day rally, but bullish China demand view intact



Chinese iron ore futures edged down on Tuesday after three straight sessions of sharp gains, though losses were capped by a buoyant demand outlook for the steelmaking ingredient in China and concerns over supply from Brazil.

The Dalian Commodity Exchange's most-traded September iron ore contract was down 0.3% to 754 yuan (\$105.88) a tonne by 0256 GMT. The most-active July contract on the Singapore Exchange, however, edged up 0.4% to \$97.64 a tonne.

Indicating a solid recovery in demand as the world's second-biggest economy eased its coronavirus restrictions, shrinking steel inventories in top producer China have prompted mills to ramp up output, boosting demand for iron ore.

Dalian iron ore has so far gained about 30% in the second quarter while spot prices are currently at 10-month highs.

Benchmark 62% iron ore's spot price steadied at \$102.50 a tonne on Monday, the highest since Aug. 5, SteelHome consultancy data showed. SH-CCN-IRNOR62



ArcelorMittal suspends dividend, drops global steel outlook

ArcelorMittal withdrew its closely watched global steel guidance because of the coronavirus pandemic, but sounded a relatively upbeat tone as lockdown restrictions start to ease.

While ArcelorMittal likened the suddenness of the virus impact to the global financial crisis, it looked forward to economies reopening. A recovery in Chinese demand, coupled with easing lockdowns in some parts of Europe and the U.S., including restarts at auto plants is "a good start," Chief Financial Officer Aditya Mittal said.

Goldman Sachs Group Inc. and Morgan Stanley economists said earlier this week that there is evidence the world economy is starting to recover from the corona virus and the restrictions placed on businesses and consumers. Steel demand -- a barometer of the global economy -- has dropped about 30 per cent in Europe and North America.

WSA recognize 9 steel cos for sustainability champions of 2019



The World Steel Association (worldsteel) has recognized 9 companies as Steel Sustainability Champions for their work in 2019.

The World Steel

Association (worldsteel) is one of the largest and most dynamic industry associations in the world, with members in every major steel-producing country.

It represents steel producers, national and regional steel industry associations, and steel research institutes. Members represent around 85% of global steel production. Now in its third year, the Steel Sustainability Champions Programme commends those steel companies that are most clearly demonstrating their commitment to sustainable development.

The 2019 Steel Sustainability Champions are:

- ArcelorMittal
- BlueScope Steel Limited
- China Steel Corporation (CSC)
- JSW Steel Limited
- Nippon Steel Corporation
- Tata Steel Europe
- Tata Steel Limited
- Tenaris
- Ternium

BlueScope Steel Limited, China Steel Corporation (CSC) and Nippon Steel Corporation are recognised as Champions for the first time. JSW Steel Limited and Ternium are recognised for the second consecutive year. ArcelorMittal, Tata Steel Europe, Tata Steel Limited and

Tenaris are recognised for the third consecutive year.

In 2018, the leaders of 71 steel companies have signed the worldsteel Sustainable Development Charter to reaffirm their commitment to the seven industry sustainable principles. The charter was first issued in 2009.

In order to recognize the Steel Sustainability champions need to signed 6 Worldsteel Sustainability Data Indicators (material efficiency, environmental management systems, lost time injury frequency rate, employee training, investment in new processes and products, economic value distributed)

In addition to the above, Life Cycle Inventory (LCI) Life Cycle Inventory (LCI) data to worldsteel's data collection programme that covers more than 50% of the company's crude steel production data and is less than 5 years old.

ISSF announces winners of the Stainless Industry

The International Stainless Steel Forum (ISSF) has announced the winners of their Awards in the New Technology, New Development, Safety and Sustainability categories during a webinar which replaced the traditional ceremony. Due to the global pandemic, the winners have not received their plaques personally, but they will be sent to them.

Best New Technology Award

Silver Award

POSCO, for the Baffle integrated stainless steel fuel tank for PHEVs



Role of steel industry in the Pandemic World of the Architects

“The architects seem to hold the key to a new economy, new solutions, new technology and new materials in a post pandemic world that will not be the same again”

The world of architecture needs to be receptive to combat with the post pandemic effects because of the changes in both the objective conditions of the people as well as in the mentalities.

A pandemic of such magnitude requiring people to be incarcerated in homes, incomes and businesses suspended, ordinary rhythm

of life snapped and damage to stock of wealth and savings is likely to have adverse impacts that would last out the period of the pandemic by months and if not years.

It is quite likely that people will not invest in apartments, travel and tourism, in shopping malls and restaurant chains. In other words, consumption of the



Dr Susmita Dasgupta

*JCE, Economic Research Unit
Joint Plant Committee*

non-essentials, or leisure items will be retarded.

This will surely have an impact on the entire construction business as we know it today. Also, with the catastrophe of nearly of 139 million migrant workers it is unlikely that workforce will return to their employers soon.

Trauma of being stranded, of hunger, fear and suffering



and death will make workers rush to their home states, unwilling to return for quite a while, making it difficult for many factories to restart production.

This is why, as many economists may feel that the recession that starts with the pandemic can decelerate fast, spinning us into zones of a vicious cycle of contraction in incomes.

Despite the morbid scenario, there has to be a silver lining and which is what could be the areas, especially post pandemic on which people may like to spend their money on; it will be worthwhile for the architects to explore these areas.

The pandemic has shown that India's public health is woefully deficient. A possible reason for this is that we have, like all welfare states imagined that the expenditure on health should be made by the government. A government taxation system, much like the Ponzi schemes can succeed only when the number of Peters from who you take money is larger than the number of Pauls, who will receive the money.

In a country like India, Peters will be less than Paul and hence public expenditures will remain woefully short of the needs of the people. This is true also for education and people end up paying huge

moneys for these two.

Perhaps the greatest cause of impoverishment is spending on hospitals. If the healthcare and education is opened to market forces, instead these remaining in the dual economy state, the usual rules of economics, like scale economies making services cheap on mass production.

If the health sector and the education sectors are opened to private investments and venture capital we could have a whole new avenue of people spending money despite and perhaps because of the pandemic. In other words, health will be the core sector of the pandemic days and it is here that architects can gain enormously.

Sector that will need Investments, Construction and Architects: Public Health and Community Medicine

First let us take two immediate needs; one is the quarantine and the other the test kiosks. Quarantine wards are difficult to come around in times when hospitals are running full. We see the possibilities of make shift hospitals made of light structural steels, which can be bolted and screwed together, emerge as make shift hospitals.

In fact, imaginative architecture in disaster management, in light and

easy to put up homes during earthquakes and floods may turn out to be a promising area of work. These structures made out of customised light but sturdy steel are usually rolled out of special intelligent machines, machines which can be carried on site. These structures are easy to install and easy to dismantle and are reusable.

The other area is the testing kiosks for pandemics. The pandemics are contagious and hence it is possible that despite laboratories and testing kits, tests may not be carried out because the technicians are scared to go out because they don't have PPEs and also because laboratories are not sealed enough to do such tests.

The disposal of the bio waste is also a problem leading to huge fights with neighbours in the vicinity. Thus, we have to place kiosks in the highway where patients and their samples can be tested. These kiosks need clever and considerate designing. The role of the architect here cannot be gainsaid.

The third area is the hospital itself. Super specialty hospitals may not be the best idea when many hospitals need to be put up and small health centres in the rural areas must be put up as well. The new age hospitals, especially post



View Point

pandemic must be designed with care with sanitation, waste water recycling, bio waste disposal, and work area for attending to emergencies.

Since many of the rural hospitals may depend on telemedicine, we may need special spaces allocated for the same. Also, rural hospitals cannot be sprawling, and one has to

groceries and items of everyday use. Sometimes, health zones are supplemented with auxiliary health care, such as alternative medicines, yoga, massage, therapies of various kinds. These use spaces and buildings with innovative design components.

We would need a lot many more toilets in villages and

relying far too much on the innovativeness of the individual, architects need to step in to scale these up and incorporate these in the regular design components. The very same design components may be provided for factories which will now demand better toilet and bathing facilities with water recycling components. Change in Technology of



coordinate small spaces with both ease of physical movement, hygiene and ease of work for doctors and nurses.

Health led development invariably leads to a host of other services; namely hotels for patients to stay in, restaurants to eat, photocopy kiosks for copying, printing, binding and mailing. Around these we need shops selling

slums, with facilities for defecation and bath. For this, we need a steady supply of water; there are tribal villages where innovative NGOs have designed recycle of bath and toilet waste water into developing kitchen gardens and wet swamps to grow vegetables and other hydroponic plants. While such efforts are individualistic and tentative,

Construction

Many of us are yet to imagine the deep changes that the construction sector may undergo. The trauma that the migrant workers have faced may not bring them back to work soon. The construction sector, the cement factories, the steel factories may soon face difficulties in starting production because of labour not returning soon.



Construction may also need to look at the possibility of doing with less labour which would mean greater mechanisation which would need a change in design. Here architects will have to be revolutionary. Once again, we may look at the light steel frame structures, containing water and electricity pipes, running below floors with heating and cooling options, which drastically reduce power consumption on account of cooling and heating, waste water recirculation, especially from the RO which can directly fill the toilet flush, waste disposal guts, solar panels and rain water harvesting will become crucial elements of design.

Not only would we need these in the high rise buildings but also in the low rise builder floors, country homes, town residencies and even in worker quarters and slums. The switch over towards mechanisation, or a larger component of technology in buildings will need to reduce our conventional dependence on labour.

Change in Materials:

Newer designs which are climate friendly and more functional in terms of rain water harvesting and garbage disposal will need new materials. Architects are the key in working with new materials; having mentioned

light steel frames, we may add saw dust boards for ceilings, light controlling glass, provision for bamboo or straw blinds and so on. These new materials which are easier for our senses and use less of mineral products like cement will need to emerge and here architects will have a renewed opportunity to be relevant to the society once more.

For rural homes and country homes, we need to retrace our steps into traditional materials. The pandemic has shown us the costs of moving away from nature. A possible reason why cement has penetrated the rural



areas is due to the supply of pipes water and electricity. Architects will assume a great importance because they may need to combine traditional materials with modern facilities.

The Lessons of the

Pandemic

The lessons we learn from the pandemic is that health needs to become the core sector around which other industries would develop. In order to create a prolific health industry, we need new design of spaces for the optimal arrangement of equipment and humans. Architects will emerge as the creator of the new spaces for the new economic thrust area.

Climate has to emerge as a major component of human habitat; in order to recreate the climate orientation of the human habitat, architects will have to redesign homes

and public spaces. New design will need new materials which may need new technology.

In sum, the architects seem to hold the key to a new economy, new solutions, new technology and new materials in a post pandemic world

that will not be the same again. ■

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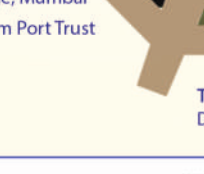
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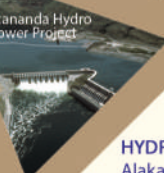


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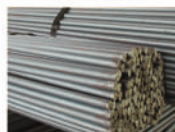
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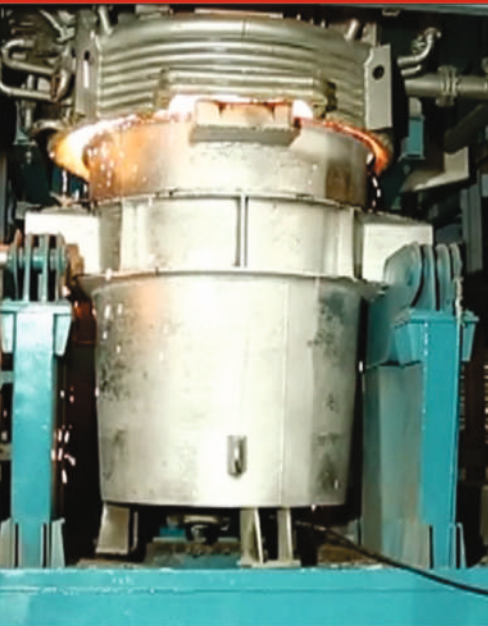
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