



MINISTRY OF STEEL

QUARTELY ANALYSIS

Q1 2018-19

Statistics Division

Major Highlights during Q1 2018-19

- ❖ India is currently the world's **3rd largest producer of crude steel** in Q1 2018-19.
- ❖ **World crude steel production** in Q1 2018-19 was 453.979 MT, a 6.25 % increase compared to Q1 2017-18. China's crude steel production in Q1 2018-19 was 238.02 MT, an increase of 9.05% compared to Q1 2017-18. Japan's crude steel production in Q1 2018-19 was 26.574 MT, an increase of 1.84% compared to Q1 2017-18. Indian crude steel production at 26.142 MT recorded a growth rate of 6.43 % in Q1 2017-18 over Q1 2017-18.
- ❖ During Q1 2018-19, Gross **production of total finished steel** 30.783 MT recorded an increased by 6.9 % over Q1 2017-18.
- ❖ Overall **imports** at 1.896 MT in Q1 2018-19, recorded a growth rate of 11.1% against Q1 2017-18.
- ❖ Overall **exports** increased to 1.352 MT during Q1 2018-19, recording a negative growth rate of 33.6 % as compared to Q1 2017-18.
- ❖ During Q1 2018-19, **Apparent steel use (ASU)** was 23.592 MT, recorded an increased by 9.2 % over Q1 2017-18.
- ❖ During Q1 2018-19, **Capacity** for domestic crude steel production was 134 MT. The Capacity Utilisation was increased by 2.81% from 75.53% in Q1 2017-18 to 77.65% in Q1 2018-19.

Table 1: Production of Finished Steel (alloy/stainless+non-alloy) and Crude steel			
(in '000 tonnes)			
Item	Q1 2018-19	Q1 2017-18	% Growth
Finished Steel			
Gross Production	30783	28786	6.94%
Imports	1896	1707	11.07%
Export	1352	2037	-33.63%
Consumption (ASU)	23592	21598	9.23%
Crude Steel			
Production	26142	24563	6.43%

Source: JPC;

World senerio

World Crude Steel Production

- World crude steel production was 453.98 MT in Q1 2018-19, recorded 6.25 % increase compared to Q1 2017-18.
- China's crude steel production in Q1 2018-19 was 238.02 MT, an increase of 9.05% compared to Q1 2017-18.
- Japan's crude steel production in Q1 2018-19 was 26.574 MT, an increase of 1.84% compared to Q1 2017-18.
- Indian crude steel production at 26.142 MT recorded a growth rate of 6.43 % in Q1 2017-18 over Q1 2017-18.
- Data are shown in Table 2.

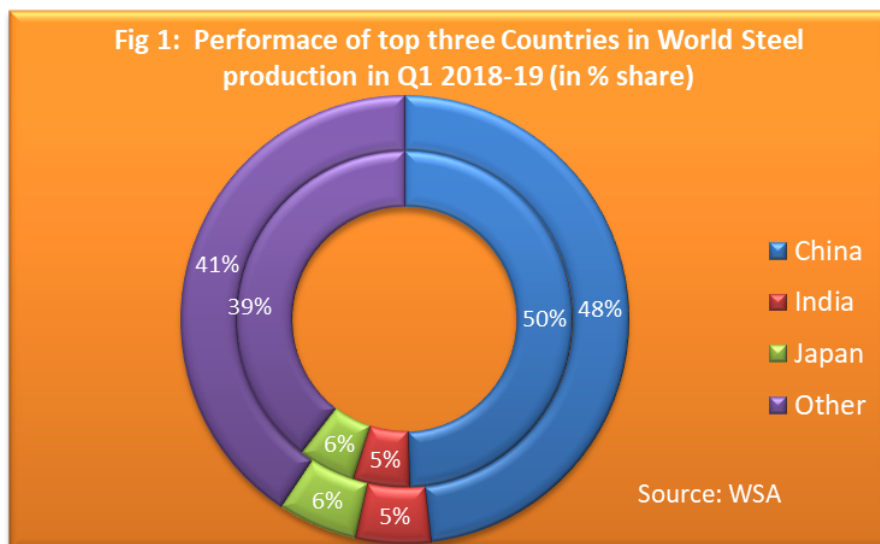
Table 2: Crude Steel Production in Q1 2018-19 in World

(in mt)

Country	Q1 2018-19	Q1 2017-18	% Growth
World	453.98	427.29	6.25%
China	238.02	218.27	9.05%
India	26.14	24.56	6.43%
Japan	26.57	26.10	1.84%
Other	189.82	184.46	2.90%

Source: World Steel Association & JPC

Fig 1: Performace of top three Countries in World Steel production in Q1 2018-19 (in % share)



World Iron Production

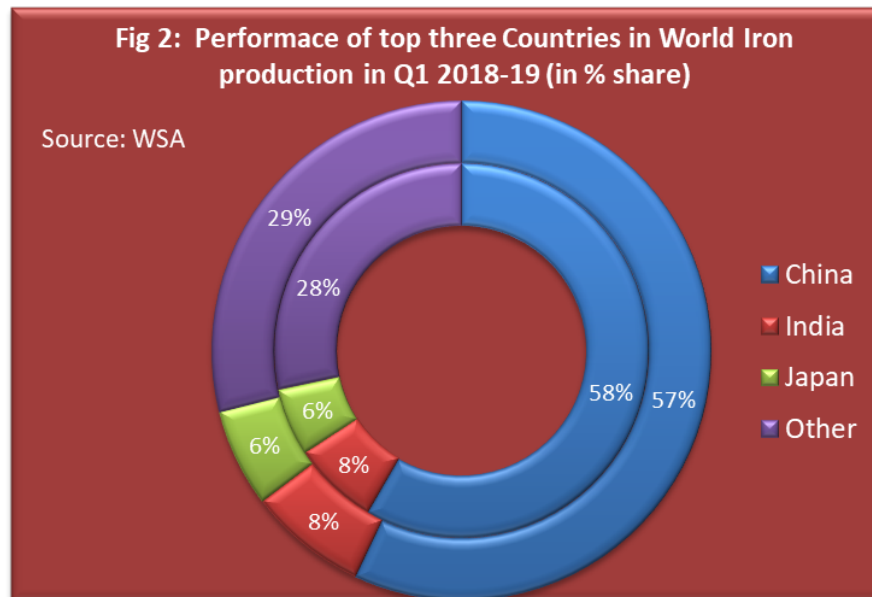
- World iron production was 335.54 MT in Q1 2018-19, recorded 8.47% increase compared to Q1 2017-18.
- China's iron production for Q1 2018-19 was 195.87 MT, an increase of 11.05 % compared to Q1 2017-18.
- Indian iron production at 25.09 MT recorded a growth rate of 5.43 % in Q1 2018-19 compared to Q1 2017-18.
- Japan's iron production for Q1 2018-19 was 19.49 MT, an decrease of 1.10 % compared to Q1 2017-18
- Data are shown in Table 3.

Table 3: Iron Production in Q1 2018-19 in World

Country	Q1 2018-19	Q1 2017-18	% Growth
World	335.54	309.35	8.47%
China	195.87	176.38	11.05%
India	25.09	23.79	5.43%
Japan	19.49	19.71	-1.10%
Other	95.09	89.47	6.29%

Source: World Steel Association & JPC

Fig 2: Performace of top three Countries in World Iron production in Q1 2018-19 (in % share)



Indian senerio

Crude Steel Production

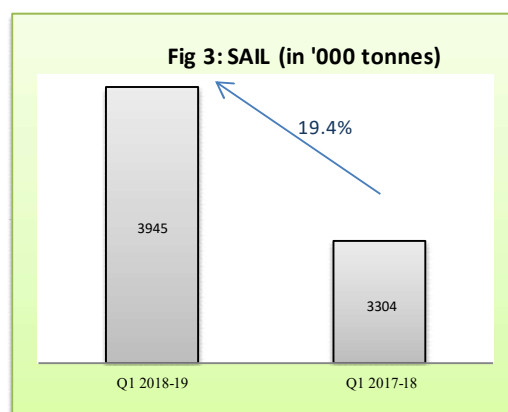
- During Q1 2018-19, total Crude Steel production of the country was 26.142 MT, registering a growth rate of 6.4 % compared to Q1 2017-18 (Table 4).

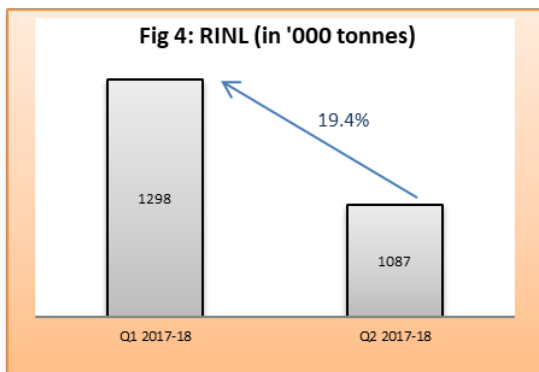
Table 4: Crude Steel Production in Q1 2018-19

Producers		Q1			Producer wise share
		2018 - 19 (Prov.)	2017 - 18	% Variation	
(In '000 tonnes)					
Public sector					
A	SAIL				
	Alloy Steel Plant	23	23	0.0%	0.09%
	Bhilai Steel Plant	1032	907	13.8%	3.95%
	Bokaro Stel Plant	950	839	13.2%	3.63%
	Durgapur Steel Plant	549	421	30.4%	2.10%
	Indian Iron & Steel Plant	499	399	25.1%	1.91%
	Rourkela Steel Plant	867	697	24.4%	3.32%
	SSP	25	18	38.9%	0.10%
	Vis. Iron & Steel	0	0	-	-
SUB TOTAL -- SAIL		3945	3304	19.4%	15.09%
B	RINL (VSP)	1298	1087	19.4%	4.97%
SUB TOTAL (Public Sector)		5243	4391	19.4%	20.06%
Private sector					
C	TSL	3174	2952	7.5%	12.14%
D	ESSAR	1872	1557	20.2%	7.16%
E	JSWL	4152	4109	1.0%	15.88%
F	JSPL	1225	904	35.5%	4.69%
G	OTHERS	10476	10650	-1.6%	40.07%
SUB TOTAL (Private Sector)		20899	20172	3.6%	79.94%
GROSS PRODUCTION		26142	24563	6.4%	100.00%

Source: JPC

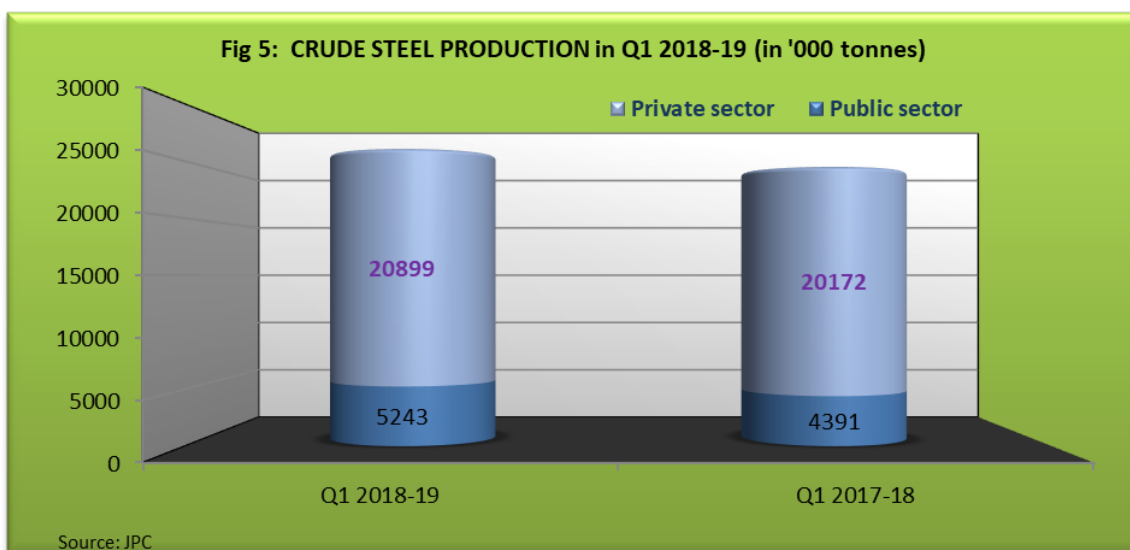
- In Q1 2018-19, SAIL produced 3.945 MT crude steel which is a growth of 19.4% over Q1 2017-18.



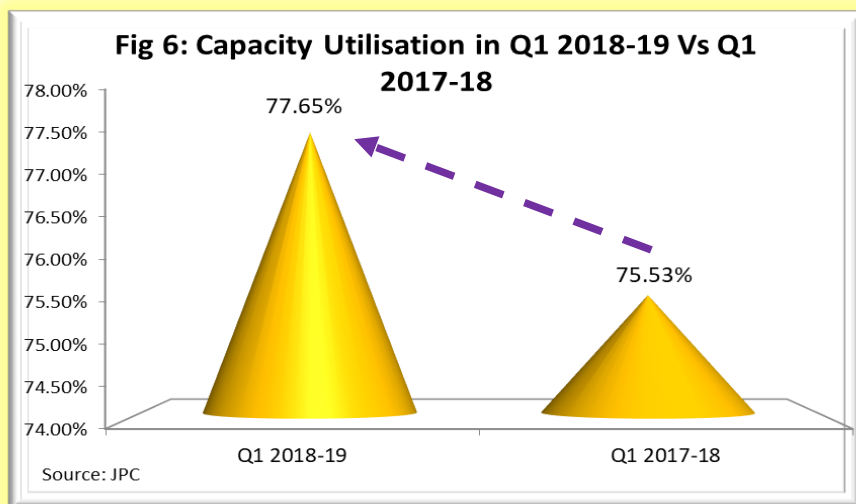


➤ In Q1 2018-19, RINL produced 1.298 MT crude steel which is a growth of 19.4% over Q1 2017-18.

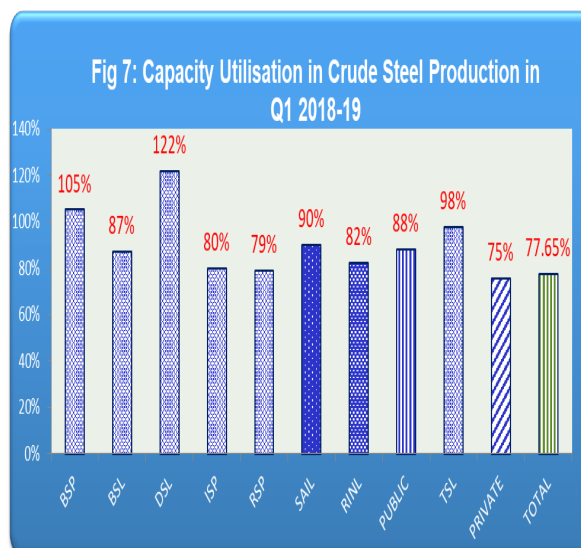
➤ During Q1 2018-19, Public sector contributed 20% (5.243 MT) in total crude steel production while private sector produced remaining 80% (20.899 MT).



➤ During Q1 2018-19, capacity utilisation of crude steel production was 77.65% which was 2.81% increase over Q1 2017-18 (75.53%).



- In capacity utilisation, during Q1 2018-19, performance of Bhilai Steel Plant (105%) and Durgapur Steel plant (122%) is praiseworthy. Bokaro Steel Plant utilised 87% of crude steel production capacity during this period. Overall performance of SAIL is 90% and that of RINL is 82%. In private sector, capacity utilisation of TSL is 98%. Capacity utilisation in public sector is 88% and that in private sector is also 75%.



Hot Metal

- During Q1 2018-19, total Hot Metal production of the country was 17.828 MT, registering a growth rate of 10.7 % as compared to Q1 2017-18 (Table 6).

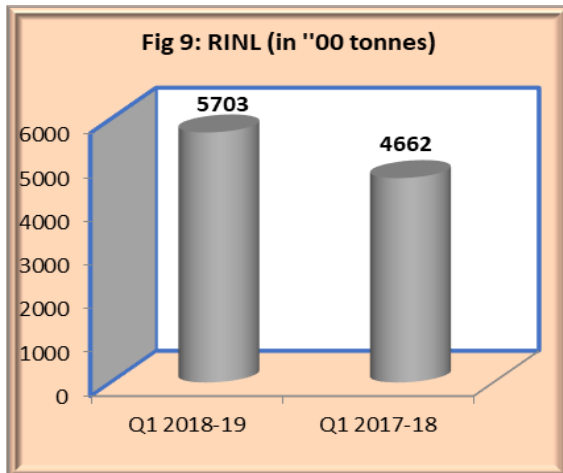
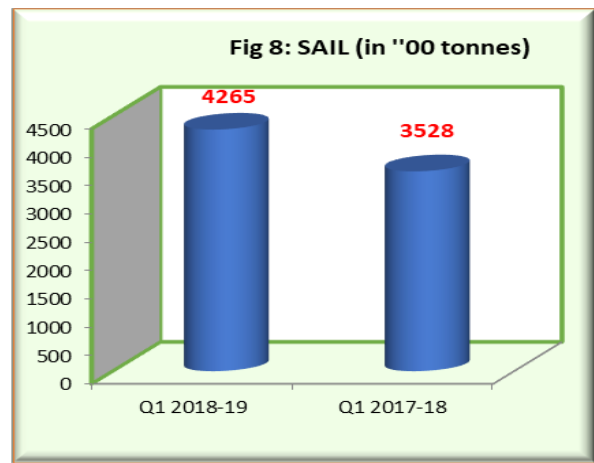
Table 6: Hot Metal Production in Q1 2018-19

(In '000 tonnes)

Producers	Q1			Producer wise share
	2018 - 19 (Prov.)	2017 - 18	% Variation	
Public sector				
A SAIL				
Bhilai Steel Plant	1104	984	12.2%	6.19%
Bokaro Steel Plant	1032	907	13.8%	5.79%
Durgapur Steel Plant	621	451	37.7%	3.48%
Indian Iron & Steel Plant	576	458	25.8%	3.23%
Rourkela Steel Plant	932	728	28.0%	5.23%
Vis. Iron & Steel	0	0	-	-
SAIL	4265	3528	20.9%	23.92%
B RINL (VSP)	1438	1134	26.8%	8.07%
SUB TOTAL (Public Sector)	5703	4662	22.3%	31.99%
Private sector				
C TSL	3429	3413	0.5%	19.23%
D ESSAR	839	788	6.5%	4.71%
E JSWL	3847	3609	6.6%	21.58%
F JSPL	1133	738	53.5%	6.36%
G OTHERS	2877	2892	-0.5%	16.14%
SUB TOTAL (Private Sector)	12125	11440	6.0%	68.01%
GROSS PRODUCTION	17828	16102	10.7%	100.00%

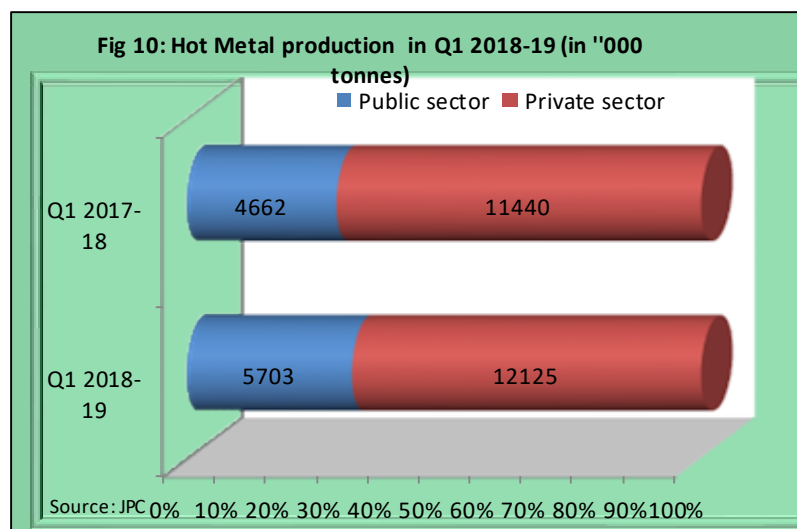
Source: JPC

- In Q1 2018-19, SAIL produced 4.265 MT hot metal which is a growth of 20.9% over Q1 2017-18.



- In Q1 2018-19, RINL produced 1.438 MT hot metal which is a growth of 26.8% over Q1 2017-18.

- During Q1 2018-19, Public sector contributed 32% (5.703 MT) in total hot metal production while private sector produced remaining 68% (12.125 MT).



Pig Iron

- During Q1 2018-19, total Pig Iron production of the country was 2.553 MT, registering a growth rate of 3.8% as compared to Q1 2017-18 (Table 7).

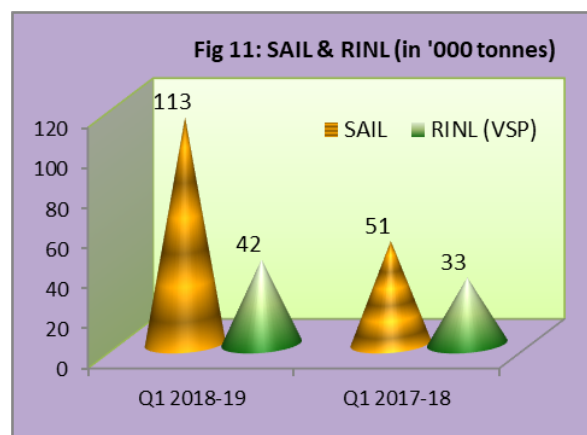
Table 7: Pig Iron Production in Q1 2018-19

(In '000 tonnes)

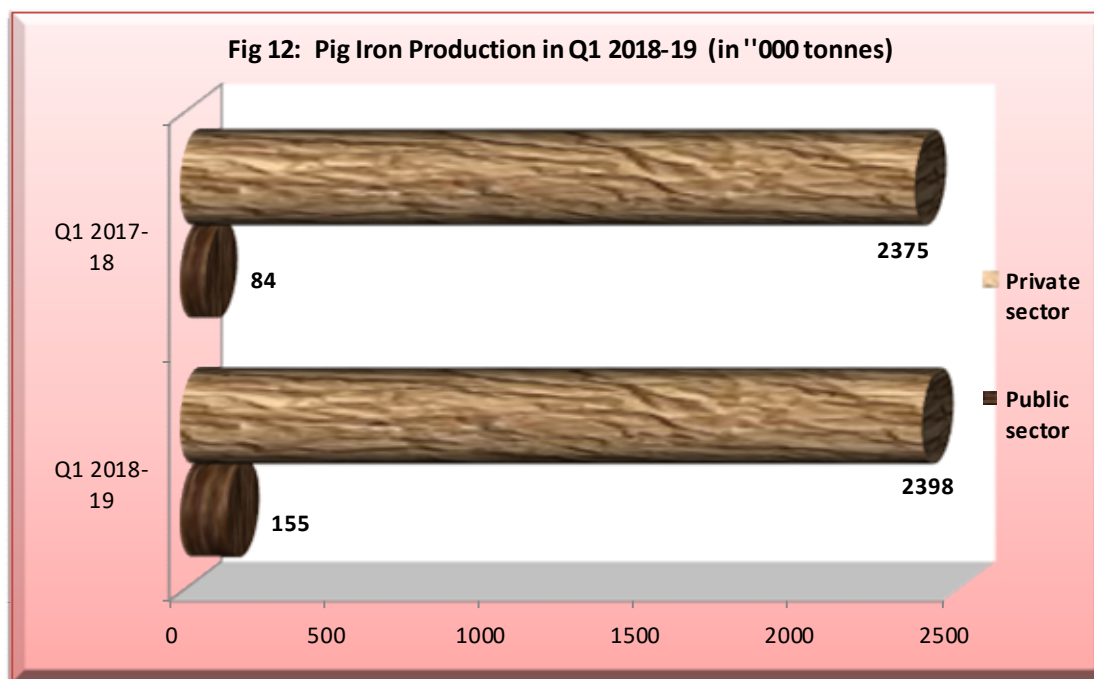
Producers		Q1			Producer wise share
		2018 - 19 (Prov.)	2017 - 18	% Variation	
Public sector					
A	SAIL				
	Alloy Steel Plant	0	0	-	-
	Bhilai Steel Plant	0	0	-	-
	Bokaro Stel Plant	11	9	22.2%	0.43%
	Durgapur Steel Plant	23	2	1050.0%	0.90%
	Indian Iron & Steel Plant	31	32	-3.1%	1.21%
	Rourkela Steel Plant	48	8	500.0%	1.88%
	SSP	0	0	-	-
	Vis. Iron & Steel	0	0	-100.0%	0.00%
	SUB TOTAL -- SAIL	113	51	120.4%	4.43%
B	RINL (VSP)	42	33	27.3%	1.65%
	SUB TOTAL (Public Sector)	155	84	84.0%	6.07%
Private sector					
C	TSL	0	0	-	-
D	ESSAR	0	0	-	-
E	JSWL	52	27	92.6%	2.04%
F	JSPL	34	52	-34.6%	1.33%
G	OTHERS	2312	2296	0.7%	90.56%
	SUB TOTAL (Private Sector)	2398	2375	1.0%	93.93%
	GROSS PRODUCTION	2553	2459	3.8%	100.00%
	Less : IPT / Own Consumption	179	127	40.9%	
	Net Production for Sale	2374	2332	1.8%	

Source: JPC

- In Q1 2018-19, SAIL produced 0.113 MT pig iron which is a growth of 120.4% over Q1 2017-18.
- In Q1 2018-19, RINL produced 0.042 MT pig iron which is a growth of 27.3% over Q1 2017-18.



- During Q1 2018-19, Public sector contributed 6% (0.155 MT) in total hot metal production while private sector produced remaining 94% (2.398 MT).



Sponge Iron

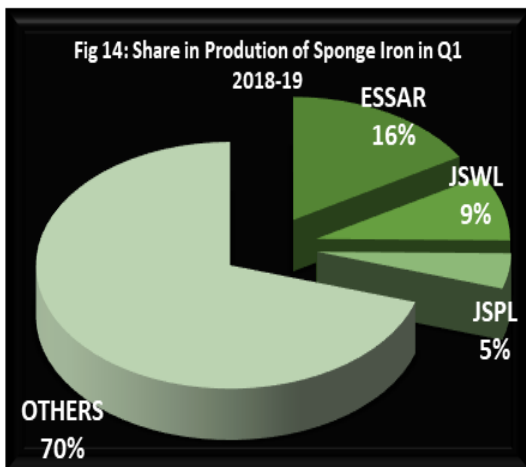
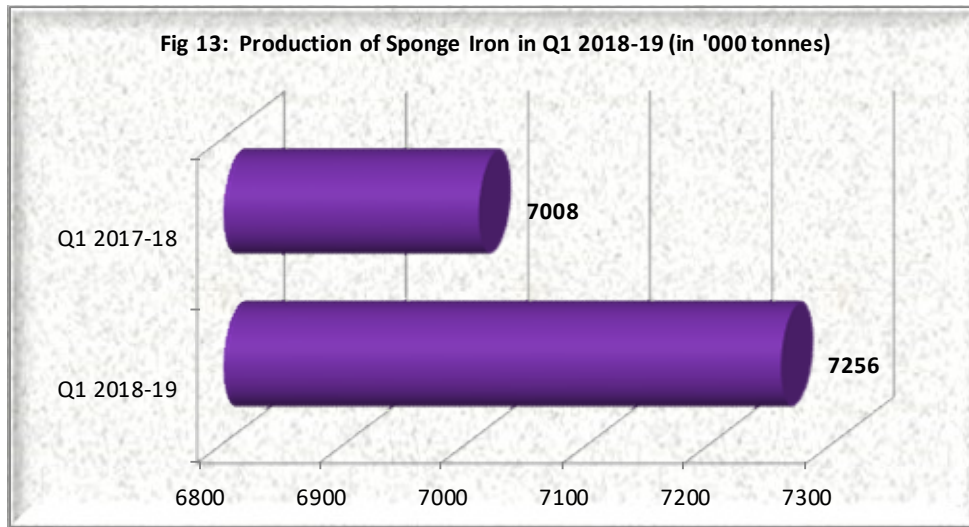
- During Q1 2018-19, total Sponge Iron production was 7.256 MT, registering a growth of 3.5% as compared to Q1 2017-18 (Table 8).

Table 8: Sponge Iron Production in Q1 2018-19

(In '000 tonnes)

Producers		Q1			Producer wise share
		2018 - 19 (Prov.)	2017 - 18	% Variation	
A	ESSAR	1191	1019	16.9%	16.41%
B	JSWL	637	524	21.6%	8.78%
C	JSPL	337	436	-22.7%	4.64%
D	OTHERS	5091	5029	1.2%	70.16%
GROSS PRODUCTION		7256	7008	3.5%	100.00%
Less : IPT / Own Consumption		3056	3171	-3.6%	
Net Production for Sale		4200	3837	9.5%	

Source: JPC



- During Q1 2018-19, ESSAR, JSWL and JSPL contributed 16%, 9% and 5% respectively in total sponge iron production.

Finished Steel

- During Q1 2018-19, Gross Finished production was 30.783 MT, registering a growth rate of 6,9 % as compared to Q1 2017-18 (Table 9).

Table 9: Production of Finished Steel in Q1 2018-19

(In '000 tonnes)

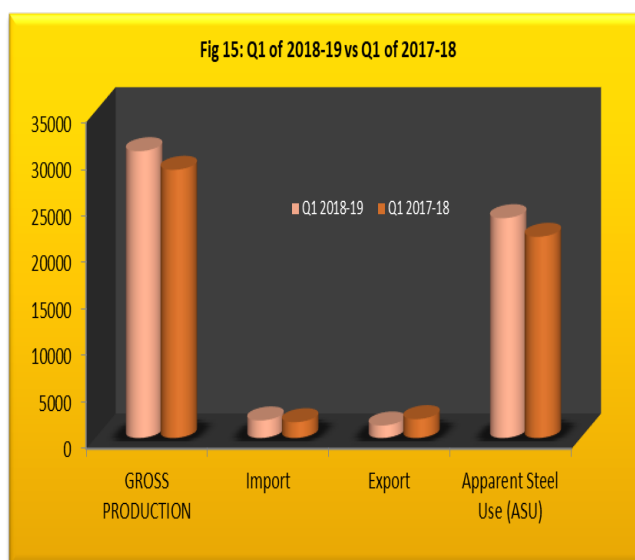
Producers	Q1			Producer wise share
	2018 - 19 (Prov.)	2017 - 18	% Variation	
Public sector				
A SAIL	3059	2839	7.7	9.94%
B RINL (VSP)	1026	893	14.9	3.33%
SUB TOTAL (Public Sector)	4085	3732	9.5	13.27%
Private sector				
C TSL	3094	2919	6.0	10.05%
D ESSAR	2625	2453	7.0	8.53%
E JSWL	5825	5302	9.9	18.92%
F JSPL	782	632	23.7	2.54%
G OTHERS	14372	13748	4.5	46.69%
SUB TOTAL (Private Sector)	26698	25054	6.6	86.73%
GROSS PRODUCTION	30783	28786	6.9	100.00%
Import	1896	1707	11.1	
Export	1352	2037	-33.6	
Input for downstream processing	6819	6189	-	
change in stock	916	669	-	
Apparent Steel Use (ASU)	23592	21598	9.2	

Source: JPC

- During Q1 2018-19, Imports was 1.896 MT recording a negative growth of 11.1% against 1.707 MT in Q1 2017-18 .During same period, Exports was 1.352 MT recording a negative growth of 33.6% as compared to 2.037 MT in Q1 2017-18.

INDIA WAS NET IMPORTER IN ALL Q1 2018-19.

- For the same period, Apparent Steel Use (ASU) reached at 23.592 MT, showing a growth of 9.2% over Q1 2017-18.



Import & Export of Flat and Non-Flat Steel

a) Import of Flat and Non-Flat Steel

- ❖ During Q1 2018-19, Imports was 1.896 MT recording a growth of 11.1% against 1705 MT in Q1c 2017-18 (Table 10).
- ❖ In the case of Flat product, the volume of imports increased to 1.552 MT in Q1 2018-19 from 1.517 MT in Q1c 2017-18.
- ❖ With respect to Non-Flat products, the total import increased to 0.344 MT in Q1 2018-19 registering a growth rate of 83 % as compared to 0.188 MT in Q1 2017-18.

Table 10: Import and Export of Iron & Steel in Q1 2018-19

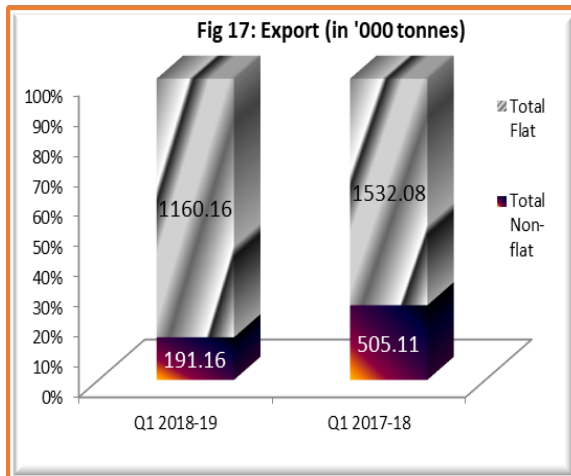
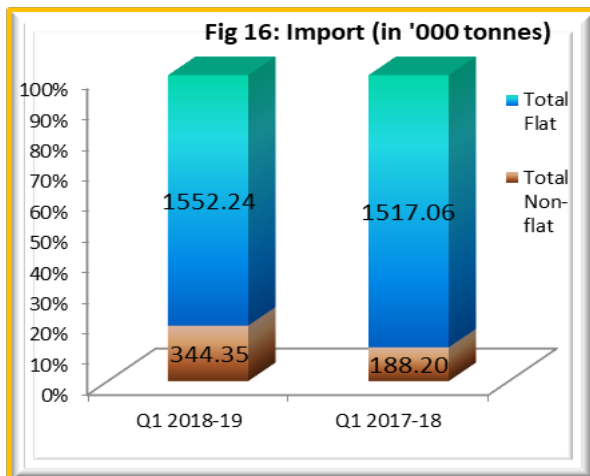
('000 tonnes)

CATEAGORY	Import			Export		
	Q1 2018-19	Q1 2017-18	% Growth	Q1 2018-19	Q1 2017-18	% Growth
Total Non-flat	344.35	188.20	83.0%	191.16	505.11	-62.2%
Total Flat	1552.24	1517.06	2.3%	1160.16	1532.08	-24.3%
GRAND TOTAL	1896.59	1705.26	11.2%	1351.32	2037.19	-33.7%

Source: JPC

b) Export of Flat and Non-Flat Steel

- ❖ During same period, Exports was 1.351 MT recording a negative growth of 33,7 % as compared to 2.037 MT in Q1 2017-18 (Table 10).
- ❖ In the case of Flat product, the volume of exports decreased to 1.160 MT in Q1 2018-19 with a negative growth rate of 24.3 % over 1.532 MT in Q1 2017-18.
- ❖ The Non-Flat products registered a negative growth of 62.2%, decreased from 0.505 MT in Q1 2017-18 to 0.191 MT in Q1 2018-19.



Iron Ore

- During Q1 2018-19, iron ore production was 53.31 MT against 51.35 MT in Q1 2017-18, recording a negative growth rate of 3.82 % (Table 11).

Table 11: Iron Ore Production in Q1 2018-19

Item	Q1 2018-19	Q1 2017-18	(in million tonnes) % Growth
Iron Ore	53.31	51.35	3.82%

Source: JPC

