

Secretary's DO Report

FLASH REPORT

FOR THE MONTH OF

JULY - 2016 (2016 - 17)



Indian Steel Industry in April-July 2016-17: A Performance Summary

The following is a status report on the performance of Indian steel industry during April-July 2016-17, based on provisional data released by JPC. It is to be noted that total finished steel includes both non-alloy and alloy (including stainless steel) and all comparisons are made with regard to same period of last year.

Total Finished Steel (alloy + non-alloy)	Indian steel scene: April-July 2016-17 (prov)	
	Qty (mt)	% change*
Production for sale	32.114	3.5
Import	2.393	-34
Export	1.695	8.7
Consumption	26.188	0.5
Crude Steel Production	31.825	5.0
Source: JPC, *over same period of last year		

I. Crude Steel:

- During April-July 2016-17, crude steel production was 31.825 million tonnes (mt), a growth of 5% over same period of last year.
- SAIL, RINL, TSL, Essar, JSWL & JSPL together produced 17.464 mt during April-July 2016-17, which was a growth of 10% compared to same period of last year.
- The rest i.e. 14.361 mt came from the Other Producers, which was a decline of 0.6% compared to last year.
- Overall crude steel production in July 2016 (8.072 mt) was up by 5.6% over July 2015 and by 0.1% over June 2016.

II. Hot Metal:

- During April-July 2016-17, hot metal production was 20.233 million tonnes (mt), a growth of 4.4% over same period of last year.
- SAIL, RINL, TSL, Essar, JSWL & JSPL together produced 16.852 mt during April-July 2016-17, which was a growth of 5.4% compared to same period of last year.



- The rest i.e. 3.381 mt came from the Other Producers, which was a decline of 0.6% compared to last year.
- Overall hot metal production in July 2016 (5.168 mt) was up by 6.1% over July 2015 and by 0.2% over June 2016.

III. Pig Iron:

- During April-July 2016-17, pig iron production for sale was 3.141 million tonnes (mt), a decline of 3.3% over same period of last year.
- SAIL, RINL, TSL, Essar, JSWL & JSPL together produced 0.304 mt during April-July 2016-17, which was a decline of 25% compared to same period of last year.
- The rest came from the Other Producers, which was a growth of 0.6% compared to last year.
- Overall pig iron production for sale in July 2016 (0.786 mt) was down by 3.3% over July 2015 but grew by 0.5% over June 2016.

IV. Total Finished Steel:

A. Production for sale

- Production for sale of total finished steel at 32.114 mt, registered a growth of 3.5% during April-July 2016-17 over same period of last year.
- SAIL, RINL, TSL, Essar, JSWL & JSPL together produced 17.437 mt during April-July 2016-17, which was a growth of 8.5% compared to same period of last year while production for the Other Producers was down by 0.6%.
- Overall finished steel production for sale in July 2016 (7.64 mt) was up by 2.6% over July 2015 but declined (by 6.4%) over June 2016.

B. Exports

- Export of total finished steel was up by 8.7% in April-July 2016-17 (1.695 mt) over same period of last year.
- Exports in July 2016 (0.468 mt) was up by 7.6% over July 2015 but declined by 13.2% over June 2016.

C. Imports

- Import of total finished steel at 2.393 mt in April-July 2016-17 declined by 34% over same period of last year.



- Imports in July 2016 (0.561 mt) was down by 46% over July 2015 and by 11.4% over June 2016.
- India remained a net importer of total finished steel during this period.

D. Consumption

- India's consumption of total finished steel saw a growth of 0.5% in April-July 2016-17 (26.188 mt) over same period of last year.
 - Consumption in July 2016 (6.289 mt) was up by 1.1% over July 2015 but was down (by 7.4%) over June 2016.
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CRUDE STEEL

Report for the Month of - JULY 2016 (2016 - 17) (Prov.)

(In '000 tonnes)

Producers	JULY			JULY Vis - A - Vis JUNE			APRIL - JULY		
	2016 - 17 (Prov.)	2015 - 16 (Prov.)	% Variation	JULY 2016 (Prov.)	JUNE 2016 (Prov.)	% Variation	2016 - 17 (Prov.)	2015 - 16 (Prov.)	% Variation
A SAIL									
a. Bhilai Steel Plant	416	415	0.2	416	421	-1.2	1636	1658	-1.3
b. Durgapur Steel Plant	179	167	7.2	179	178	0.6	700	653	7.2
c. Rourkela Steel Plant	218	229	-4.8	218	217	0.5	868	906	-4.2
d. Bokaro Stel Plant	221	293	-24.6	221	245	-9.8	1022	1222	-16.4
e. Indian Iron & Steel Plant	120	60	100.0	120	110	9.1	413	249	65.9
f. Alloy Steel Plant	7	8	-12.5	7	8	-12.5	30	29	3.4
g. SSP	7	3	133.3	7	11	-36.4	38	38	0.0
h. Vis. Iron & Steel	1	7	-85.7	1	7	-85.7	13	16	-18.8
Total SAIL	1169	1182	-1.1	1,169	1,197	-2.3	4720	4771	-1.1
B RINL (VSP)	346	321	7.8	346	348	-0.6	1287	1224	5.1
C TSL	907	836	8.5	907	867	4.6	3340	3182	5.0
D ESL + JSWL + JSPL	2074	1695	22.4	2,074	2,058	0.8	8117	6696	21.2
E OTHERS	3576	3609	-0.9	3576	3597	-0.6	14361	14443	-0.6
GRAND PRODUCTION	8072	7643	5.6	8072	8067	0.1	31825	30316	5.0

Note : 1. Ispat has a compact mill, hence it does not report the production of crude steel. The production of Crude steel has been estimated on the basis of actual finished steel production.

2. The production figures of SAIL, RINL & TSL are as reported.

3. The production figures of ESL, JSWL & JSPL are estimated as per the production trend of previous months from April 2016.

4. The production of Other Producers are estimated as per the receipt status and the production trend of previous months from April 2016.



HOT METAL

Report for the Month of - JULY 2016 (2016 - 17) (Prov.)

(In '000 tonnes)

Producers	JULY			JULY Vis - A - Vis JUNE			APRIL - JULY		
	2016 - 17 (Prov.)	2015 - 16 (Prov.)	% Variation	JULY 2016 (Prov.)	JUNE 2016 (Prov.)	% Variation	2016 - 17 (Prov.)	2015 - 16 (Prov.)	% Variation
A SAIL									
a. Bhilai Steel Plant	444	447	-0.7	444	448	-0.9	1726	1776	-2.8
b. Durgapur Steel Plant	205	186	10.2	205	207	-1.0	806	738	9.2
c. Rourkela Steel Plant	232	256	-9.4	232	230	0.9	922	1030	-10.5
d. Bokaro Stel Plant	244	320	-23.8	244	266	-8.3	1105	1345	-17.8
e. Indian Iron & Steel Plant	156	113	38.1	156	143	9.1	572	452	26.5
h. Vis. Iron & Steel	2	9	-77.8	2	9	-77.8	18	22	-18.2
Total SAIL	1283	1331	-3.6	1,283	1,303	-1.5	5149	5363	-4.0
B RINL (VSP)	378	350	8.0	378	374	1.1	1398	1344	4.0
C TSL	973	878	10.8	973	940	3.5	3713	3469	7.0
D ESL + JSWL + JSPL	1691	1467	15.3	1,691	1,693	-0.1	6592	5808	13.5
E OTHERS	843	844	-0.1	843	846	-0.4	3381	3402	-0.6
GRAND PRODUCTION	5168	4870	6.1	5168	5156	0.2	20233	19386	4.4

Note: 1. The production figures of SAIL, RINL & TSL are as reported.

2. The production figures of ESL, JSWL & JSPL are estimated as per the production trend of previous months from April 2016.

3. The production of Other Producers are estimated as per the receipt status and the production trend of previous months from April 2016.



PIG IRON

Report for the Month of - JULY 2016 (2016 - 17) (Prov.)

(In '000 tonnes)

Producers	JULY			JULY Vis - A - Vis JUNE			APRIL - JULY		
	2016 - 17 (Prov.)	2015 - 16 (Prov.)	% Variation	JULY 2016 (Prov.)	JUNE 2016 (Prov.)	% Variation	2016 - 17 (Prov.)	2015 - 16 (Prov.)	% Variation
A SAIL									
a. Bhilai Steel Plant	0	0		0	0		0	0	
b. Durgapur Steel Plant	8	5	60.0	8	10	-20.0	37	26	42.3
c. Rourkela Steel Plant	5	8	-37.5	5	2	150.0	15	51	-70.6
d. Bokaro Stel Plant	0	2	-100.0	0	0	#DIV/0!	5	12	-58.3
e. Indian Iron & Steel Plant	22	40	-45.0	22	21	4.8	105	136	-22.8
f. Alloy Steel Plant	0	0		0	0		0	0	
g. SSP	0	0		0	0		0	0	
h. Vis. Iron & Steel	0	1		0	1	-100.0	2	3	-33.3
Total SAIL	35	56	-37.5	35	34	2.9	164	228	-28.1
B RINL (VSP)	10	4	150.0	10	4	150.0	27	39	-30.8
C TSL	0	0		0	0		0	0	
D ESL + JSWL + JSPL	30	42		30	35	-14.3	113	140	-19.3
E OTHERS	760	752	1.1	760	757	0.4	3030	3013	0.6
GROSS PRODUCTION	835	854	-2.2	835	830	0.6	3334	3420	-2.5
Less : IPT / Own Consumption	49	41	19.5	49	48	2.1	193	172	12.2
Total Production for Sale	786	813	-3.3	786	782	0.5	3141	3248	-3.3

Note: 1. The production figures of SAIL, RINL & TSL are as reported.

2. The production figures of ESL, JSWL & JSPL are estimated as per the production trend of previous months from April 2016.

3. The production of Other Producers are estimated as per the receipt status and the production trend of previous months from April 2016.



FINISHED STEEL FOR SLAE

Report for the Month of - JULY 2016 (2016 - 17) (Prov.)

(In '000 tonnes)

Producers	JULY			JULY Vis - A - Vis JUNE			APRIL - JULY		
	2016 - 17 (Prov.)	2015 - 16 (Prov.)	% Variation	JULY 2016 (Prov.)	JUNE 2016 (Prov.)	% Variation	2016 - 17 (Prov.)	2015 - 16 (Prov.)	% Variation
A SAIL	937	815	15.0	937	872	7.5	3578	3381	5.8
B RINL (VSP)	229	210	9.0	229	261	-12.3	940	845	11.2
C TSL	576	756	-23.8	576	663	-13.1	2785	2943	-5.4
D ESL + JSWL + JSPL	2610	2298	13.6	2,610	2,482	5.2	10134	8901	13.9
E OTHERS	4060	4118	-1.4	4,060	4666	-13.0	17801	17912	-0.6
GRAND PRODUCTION	8412	8197	2.6	8412	8944	-5.9	35238	33982	3.7
Less : IPT / Own Consumption	772	752	2.7	772	784	-1.5	3124	2961	5.5
Total Production for Sale	7640	7445	2.6	7640	8160	-6.4	32114	31021	3.5

Note 1. The production figures of SAIL, RINL & TSL are as reported.

2. The production figures of ESL, JSWL & JSPL are estimated as per the production trend of previous months from April 2016.

3. The production of Other Producers are estimated as per the receipt status and the production trend of previous months from April 2016.



PRODUCTION, IMPORTS, EXPORTS, AVAILABILITY & APPARENT CONSUMPTION (Provisional)

APRIL 2016 - JULY 2016

(In '000 tonnes)

PRODUCERS	FINISHED STEEL								
	Non-Alloy Steel (Carbon)			Alloy Steel			Total		
	2016 - 17 (Prov.)	2015 - 16 (Prov.)	% Variation	2016 - 17 (Prov.)	2015 - 16 (Prov.)	% Variation	2016 - 17 (Prov.)	2015 - 16 (Prov.)	% Variation
SAIL	3537	3329	6.2	41	52	-21.2	3578	3381	5.8
RINL	940	845	11.2				940	845	11.2
TSL	2785	2943	-5.4				2785	2943	-5.4
ESSAR + JSWL + JSPL	9899	8729	13.4	235	172	36.6	10134	8901	13.9
OTHERS	14808	14778	0.2	2993	3134	-4.5	17801	17912	-0.6
Gross Production	31969	30624	4.4	3269	3358	-2.7	35238	33982	3.7
Less : IPT/Own Consumption	3114	2953	5.5	10	8	25.0	3124	2961	5.5
c) Total Production for Sale	28855	27671	4.3	3259	3350	-2.7	32114	31021	3.5
d) Imports	1836	2827	-35.1	557	799	-30.3	2393	3626	-34.0
e) Exports	1540	1376	11.9	155	183	-15.3	1695	1559	8.7
e) Availability (c+d-e)	29151	29122	0.1	3661	3966	-7.7	32812	33088	-0.8
f) Variation in Stock	1104	1273		56	-92		1160	1181	
g) Apparent Consumption (e-f)	28047	27849	0.7	3605	4058	-11.2	31652	31907	-0.8
Less : Double Counting	4411	4788		1053	1071		5464	5859	
Consumption	23636	23061	2.5	2552	2987	-14.6	26188	26048	0.5



PRODUCTION, IMPORTS, EXPORTS, AVAILABILITY & APPARENT CONSUMPTION (Provisional)

JULY 2016

(In '000 tonnes)

PRODUCERS	FINISHED STEEL								
	Non-Alloy Steel (Carbon)			Alloy Steel			Total		
	2016 - 17 (Prov.)	2015 - 16 (Prov.)	% Variation	2016 - 17 (Prov.)	2015 - 16 (Prov.)	% Variation	2016 - 17 (Prov.)	2015 - 16 (Prov.)	% Variation
SAIL	930	799	16.4	7	16	-56.3	937	815	15.0
RINL	229	210	9.0	0	0		229	210	9.0
TSL	576	756	-23.8	0	0		576	756	-23.8
ESSAR + JSWL + JSPL	2551	2249	13.4	59	49	20.4	2610	2298	13.6
OTHERS	3335	3359	-0.7	725	759	-4.5	4060	4118	-1.4
Gross Production	7621	7373	3.4	791	824	-4.0	8412	8197	2.6
Less : IPT/Own Consumption	769	750	2.5	3	2	50.0	772	752	2.7
c) Total Production for Sale	6852	6623	3.5	788	822	-4.1	7640	7445	2.6
d) Imports	419	833	-49.7	142	200	-29.0	561	1033	-45.7
e) Exports	429	368	16.6	39	67	-41.8	468	435	7.6
e) Availability (c+d-e)	6842	7088	-3.5	891	955	-6.7	7733	8043	-3.9
f) Variation in Stock	70	285		8	70		78	355	
g) Apparent Consumption (e-f)	6772	6803	-0.5	883	885	-0.2	7655	7688	-0.4
Less : Double Counting	1103	1197		263	268		1366	1465	
Consumption	5669	5606	1.1	620	617	0.5	6289	6223	1.1



PRODUCTION, IMPORTS, EXPORTS, AVAILABILITY & APPARENT CONSUMPTION (Provisional)

JULY 2016 Vis - A - Vis JUNE 2016

(In '000 tonnes)

PRODUCERS	FINISHED STEEL								
	Non-Alloy Steel (Carbon)			Alloy Steel			Total		
	JULY (Prov.)	JUNE (Prov.)	% Variation	JULY (Prov.)	JUNE (Prov.)	% Variation	JULY (Prov.)	JUNE (Prov.)	% Variation
SAIL	930	858	8.4	7	14	-50.0	937	872	7.5
RINL	229	261	-12.3	0			229	261	-12.3
TSL	576	663	-13.1	0			576	663	-13.1
ESSAR + JSWL + JSPL	2551	2424		59	58		2610	2482	5.2
OTHERS	3335	3843	-13.2	725	823	-11.9	4060	4666	-13.0
Gross Production	7621	8049	-5.3	791	895	-11.6	8412	8944	-5.9
Less : IPT/Own Consumption	769	782	-1.7	3	2	50.0	772	784	-1.5
c) Total Production for Sale	6852	7267	-5.7	788	893	-11.8	7640	8160	-6.4
d) Imports	419	509	-17.7	142	124	14.5	561	633	-11.4
e) Exports	429	501	-14.4	39	38	2.6	468	539	-13.2
e) Availability (c+d-e)	6842	7275	-6.0	891	979	-9.0	7733	8254	-6.3
f) Variation in Stock	70	99		8	0		78	99	
g) Apparent Consumption (e-f)	6772	7176	-5.6	883	979	-9.8	7655	8155	-6.1
Less : Double Counting	1103	1103		263	264		1366	1367	
Consumption	5669	6073	-6.7	620	715	-13.3	6289	6788	-7.4

Stock Position

000 Tonnes

Stock	Month Begin	Month End	Monthly Variation in Stock	Cumulative Variation in Stock
APRIL 2016	4,142	5,054	912	912
MAY 2016	5,054	5,125	71	983
JUNE 2016	5,125	5,224	99	1,082
JULY 2016	5,224	5,302	78	1,160



PRODUCTION OF SALEABLE STEEL OF SAIL, RINL & TSL

000 tonnes

Report for the Month of JULY - 2016 (FY 2016 - 17)

PRODUCER	JULY			APRIL - JULY		
	2016 - 17 (Prov.)	2015 - 16 (Prov.)	% Variation	2016 - 17 (Prov.)	2015 - 16 (Prov.)	% Variation
1 SAIL						
i Bhilai Steel Plant	329	325	1.2	1354	1348	0.4
ii Durgapur Steel Plant	170	162	4.9	672	623	7.9
iii Rourkela Steel Plant	197	213	-7.5	917	764	20.0
iv Bokaro Steel Plant	305	221	38	1101	1045	5.4
v Indian Iron & Steel	118	60	96.7	395	184	114.7
vi Alloy Steel Plant	7	6	16.7	29	25	16.0
vii SSP	30	31	-3.2	119	108	10.2
viii Vis Iron & Steel	2	7	-71.4	7	15	-53.3
Total SAIL	1158	1025	13	4594	4112	11.7
2 TSL	645	790	-18.4	2884	3019	-4.5
3 RINL	282	267	5.6	1140	1064	7.1
Total (Main Producers)	2085	2082	0.1	8618	8195	5.2



PRODUCTION, IMPORTS, EXPORTS, AVAILABILITY & APPARENT CONSUMPTION (Provisional)

APRIL 2016 - JULY 2016

(In '000 tonnes)

PRODUCERS	FINISHED STEEL									PIG IRON		
	Non-Alloy Steel (Carbon)			Alloy Steel			Total			2016 - 17 (Prov.)	2015 - 16 (Prov.)	% Variation
	2016 - 17 (Prov.)	2015 - 16 (Prov.)	% Variation	2016 - 17 (Prov.)	2015 - 16 (Prov.)	% Variation	2016 - 17 (Prov.)	2015 - 16 (Prov.)	% Variation			
SAIL	3537	3329	6.2	41	52	-21.2	3578	3381	5.8	164	229	-28.4
RINL	940	845	11.2				940	845	11.2	27	39	-30.8
TSL	2785	2943	-5.4				2785	2943	-5.4			
ESSAR + JSWL + JSPL	9899	8729	13.4	235	172	36.6	10134	8901	13.9	113	139	-18.7
OTHERS	14808	14778	0.2	2993	3134	-4.5	17801	17912	-0.6	3030	3013	0.6
Gross Production	31969	30624	4.4	3269	3358	-2.7	35238	33982	3.7	3334	3420	-2.5
Less : IPT/Own Consumption	3114	2953	5.5	10	8	25.0	3124	2961	5.5	193	172	12.2
c) Total Production for Sale	28855	27671	4.3	3259	3350	-2.7	32114	31021	3.5	3141	3248	-3.3
d) Imports	1836	2827	-35.1	557	799	-30.3	2393	3626	-34.0	8	7	14.3
e) Exports	1540	1376	11.9	155	183	-15.3	1695	1559	8.7	31	235	-86.8
e) Availability (c+d-e)	29151	29122	0.1	3661	3966	-7.7	32812	33088	-0.8	3118	3020	3.2
f) Variation in Stock	1104	1273		56	-92		1160	1181		10	-113	
g) Apparent Consumption (e-f)	28047	27849	0.7	3605	4058	-11.2	31652	31907	-0.8	3108	3133	-0.8
Less : Double Counting	4411	4788		1053	1071		5464	5859				
Consumption	23636	23061	2.5	2552	2987	-14.6	26188	26048	0.5	3108	3133	-0.8



PRODUCTION, IMPORTS, EXPORTS, AVAILABILITY & APPARENT CONSUMPTION (Provisional)

JULY 2016

(In '000 tonnes)

PRODUCERS	FINISHED STEEL									PIG IRON		
	Non-Alloy Steel (Carbon)			Alloy Steel			Total			2016 - 17 (Prov.)	2015 - 16 (Prov.)	% Variation
	2016 - 17 (Prov.)	2015 - 16 (Prov.)	% Variation	2016 - 17 (Prov.)	2015 - 16 (Prov.)	% Variation	2016 - 17 (Prov.)	2015 - 16 (Prov.)	% Variation			
SAIL	930	799	16.4	7	16	-56.3	937	815	15.0	37	57	-35.1
RINL	229	210	9.0	0	0		229	210	9.0	10	4	150.0
TSL	576	756	-23.8	0	0		576	756	-23.8	0	0	
ESSAR + JSWL + JSPL	2551	2249	13.4	59	49	20.4	2610	2298	13.6	30	41	-26.8
OTHERS	3335	3359	-0.7	725	759	-4.5	4060	4118	-1.4	760	752	1.1
Gross Production	7621	7373	3.4	791	824	-4.0	8412	8197	2.6	837	854	-2.0
Less : IPT/Own Consumption	769	750	2.5	3	2	50.0	772	752	2.7	49	41	19.5
c) Total Production for Sale	6852	6623	3.5	788	822	-4.1	7640	7445	2.6	788	813	-3.1
d) Imports	419	833	-49.7	142	200	-29.0	561	1033	-45.7	0	4	-100.0
e) Exports	429	368	16.6	39	67	-41.8	468	435	7.6	23	52	-55.8
e) Availability (c+d-e)	6842	7088	-3.5	891	955	-6.7	7733	8043	-3.9	765	765	0.0
f) Variation in Stock	70	285		8	70		78	355		0	-1	
g) Apparent Consumption (e-f)	6772	6803	-0.5	883	885	-0.2	7655	7688	-0.4	765	766	-0.1
Less : Double Counting	1103	1197	-7.9	263	268	-1.9	1366	1465		0	0	
Consumption	5669	5606	1.1	620	617	0.5	6289	6223	1.1	765	766	-0.1