By Speed Post

Annexure_1.1

छत्तीसगढ शासन
खनिज साधन विभाग
मंत्रालय
महानदी भवन, नवा रायपुर, अटल नगर–492 002

क्रमांक एफ 2–20/2005/12, नवा रायपुर अटल नगर, दिनांक जून, 2021

प्रति,

26 JUN 2021

मुख्य कार्यपालन अधिकारी,
एनएमडीसी–सीएमडीसी लिमिटेड(एनसीएल),
ग्रीन विले सिटी, हाऊसिंग बोर्ड कालोनी,
सेजबहार, बोरिया कला, शदाणी दरबार के सामने,
एनएच–30, रायपुर, छत्तीसगढ़ –492 015.

विषयः– जिला दक्षिण बस्तर दंतेवाड़ा, बैलाडीला, डिपॉजिट नं. 4 के कुल रकबा 646.596 हेक्टर क्षेत्र खनिज लौह अयस्क का खनिपट्टा की स्वीकृति हेतु–मेसर्स एनएमडीसी–सीएमडीसी लिमिटेड (एनसीएल)।

संदर्भः– आपका पत्र क्रमांक No. NCL/HO/Dep-4/LEASE/2017/597, Date 09.10.2019.

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जिला दक्षिण बस्तर दंतेवाड़ा, बैलाडीला डिपॉजिट–4 के कुल रकबा 646.596 हेक्टेयर क्षेत्र में खनिज आयरन ओर का खनिपट्टा हेतु मेसर्स एनएमडीसी–सीएमडीसी लिमिटेड (एनसीएल) द्वारा दिनांक 21.11.2019 को आवेदन पत्र प्रस्तुत किया गया है।

2/ प्रश्नाधीन क्षेत्र का विवरण निम्नानुसार है :–

2.1 एनएमडीसी–सीएमडीसी लिमिटेड (एनसीएल) एक संयुक्त उपक्रम की कम्पनी (JVC) है जिसमें एनएमडीसी एवं सीएमडीसी लिमि. का क्रमशः 51:49 की भागीदारी है। राज्य के स्पंज/स्टील उद्योगों की लौह अयस्क की आवश्यकता की आपूर्ति संबंधी कठिनाई को ध्यान में रखते हुए इस संयुक्त उपक्रम कम्पनी (JVC) द्वारा बैलाडीला डिपाजिट क्रमांक–04 का विकास किये जाने हेतु एनएमडीसी एवं सीएमडीसी मे मध्य सहमति हुई है और एक औपचारिक सहमति (मेमोरेडम आफ अडरस्टैडिंग) निष्पादित किया गया है।

2.2 प्रश्नाधीन क्षेत्र में एनएमडीसी के पक्ष में पूर्ववर्ती मध्यप्रदेश शासन के पत्र क. 4043/4381/12, दिनांक 03.09.1971 द्वारा पूर्वेक्षण अनुज्ञप्ति स्वीकृत किया गया था। पूर्वेक्षण कार्य के आधार पर एनएमडीसी ने क्षेत्र पर 107 मिलियन टन लौह अयस्क के माइनेबल भण्डार प्रमाणित किये हैं।

2.3 एनएमडीसी द्वारा जिला दक्षिण बस्तर दंतेवाड़ा के बैलाडिला स्थित डिपाजिट क्रमांक–4 के वन कक्ष कमांक 659, 661, 662, 663, 664, 665, 666, 667, 668, 672 एवं 676, 778 (टोपोशीट 65 एफ/2) के क्षेत्र पर खनिज लौह अयस्क का खनिपट्टा स्वीकृति हेतु आवेदन पत्र दिनांक 27.02.1991 प्रस्तुत किया गया, जिस पर निर्णय लेते हुए विभागीय पत्र दिनांक 30.09.2010 के माध्यम से पूर्वानुमोदन प्रस्ताव भारत सरकार, खान मंत्रालय को प्रेषित किया गया। जिसके परिप्रेक्ष्य में भारत सरकार, खान मंत्रालय ने अपने पत्र कमांक 5/103/2010–M.IV, दिनांक 30.11.2011 द्वारा 20 वर्ष की अवधि के लिए खनिपट्टा स्वीकृत किए जाने हेतु एमएमडीआर एक्ट, 1957 की धारा–5(1) के तहत पूर्वानुमोदन एवं धारा–6(1)(बी) के तहत् निर्धारित सीमा में छूट निम्नानुसार अतिरिक्त शर्त के तहत प्रदान की गई :–

"There shall be no change in the equity ratio of 51:49 in the Joint Venture between M/s National Mineral Development Corporation Ltd. and M/s Chhattishgarh Mineral Development Corporation without the approval of the Central Government."

2.4 उपरोक्त के संदर्भ में विभागीय समसंख्यक पत्र दिनांक 13.01.2012 द्वारा एनएमडीसी को खनिपट्टा स्वीकृति हेतु आईबीएम द्वारा अनुमोदित मायनिंग प्लान एवं वन संरक्षण अधिनियम 1980 के तहत् आवश्यक अनुमति वन विभाग से प्राप्त कर प्रस्तुत करने हेतु (LoI) लेख किया गया।

30/06/2021
AGM(Mkt), NCL

2.5 एनएमडीसी ने पत्र दिनांक 13.08.2013 के माध्यम से भारतीय खान ब्यूरो, नागपुर के पत्र दिनांक 26.07.2013 द्वारा रकबा 646.596 हेक्टेयर क्षेत्र का अनुमोदित मायनिंग प्लान प्रस्तुत किया गया, किन्तु भारत सरकार, पर्यावरण एवं वन मंत्रालय से वांछित वन एवं पर्यावरणीय अनुमति प्रस्तुत नहीं किया गया।

2.6 विभागीय समसंख्यक पत्र दिनांक 13.01.2012 द्वारा जारी LoI के संदर्भ में एनएमडीसी द्वारा वन एवं पर्यावरणीय सम्मितियॉ आदि MMDR Act, 1957 (यथा संशोधित 2015) की धारा–10A(2)(c) अनुसार निर्धारित तिथि 11.01.2017 तक प्रस्तुत नही की जा सकी। अतएव MMDR Act, 1957 (यथा संशोधित 2015) की धारा–10A(2)(c) सहपठित खनिज (परमाणु और हाइड्रोकार्बन ऊर्जा खनिजों से भिन्न) रियायत नियम, 2016 के नियम–8(4) के तहत् विषयक खनिपट्टा प्रकरण में खनिपट्टा स्वीकृति आदेश जारी नही किया गया जो कि अधिनियम के उक्त प्रावधानों के तहत् स्वमेव समाप्त हो गया।

2.7 एनएमडीसी द्वारा उक्त के संदर्भ में माननीय उच्च न्यायालय छत्तीसगढ़, बिलासपुर के समक्ष प्रकरण क्रमांक W.P.(c) No. 100/2017., NMDC Ltd Vs UoI & Others दायर किया गया। एनएमडीसी द्वारा याचिका वापस लेने के कारण माननीय न्यायालय के आदेश दिनांक 21.04.2017 द्वारा उक्त रिट पिटिशन dismissed as withdrawn किया गया है।

2.8 संयुक्त उद्यम कम्पनी (JVC) एनएमडीसी–सीएमडीसी लिमिटेड (एनसीएल) द्वारा उपर्युक्त क्षेत्र जिला बस्तर के बैलाडीला आयरन ओर डिपॉजिट–4 के कुल रकबा 646.596 हेक्टेयर को MMDR Act, 1957(यथा संशोधित 2015) की धारा–17A(1A) के तहत् खनिपट्टा स्वीकृति हेतु दिनांक 21.11.2019 को आवेदन प्रस्तुत किया गया। जिसके संदर्भ में विभागीय समसंख्यक पत्र दिनांक 17.01.2018 द्वारा धारा–17A(1A) के तहत् उपर्युक्त क्षेत्र को एनसीएल के पक्ष में आरक्षित करने हेतु भारत सरकार, खान मंत्रालय को प्रस्ताव प्रेषित किया गया।

2.9 भारत सरकार, खान मंत्रालय, नई दिल्ली की अधिसूचना दिनांक 30.09.2019 द्वारा मेसर्स एनएमडीसी–सीएमडीसी लिमिटेड (एनसीएल) के पक्ष में MMDR Act, 1957(यथा संशोधित 2015) की धारा–17A(1A) के तहत् बैलाडीला डिपॉजिट क्रमांक–4 के कुल रकबा 646.596 हेक्टेयर के निम्नलिखित खेत्र को 05 वर्ष की अवधि के लिए आरक्षित किया गया है :–

खनिज का नाम	स्थिति	क्षेत्र	पिलर	अक्षांश	देशांतर
लौह अयस्क	बैलाडीला आरक्षित वन, निक्षेप सं. 4 जिला दक्षिण बस्तर, छत्तीसगढ़	646.596 हेक्टेयर	A	81°12'10.40"	18°43'45.70"
			B	81°13'10.80"	18°43'40.90"
			C	81°13'08.80"	18°43'05.90"
			D	81°13'05.50"	18°43'05.80"
			E	81°12'57.30"	18°41'27.70"
			F	81°12'28.80"	18°41'52.90"
			G	81°11'57.70"	18°41'58.70"

2.10 उक्त के संदर्भ में एनसीएल द्वारा जिला दक्षिण बस्तर दंतेवाड़ा के बैलाडीला आयरन ओर डिपॉजिट–4 के कुल रकबा 646.596 हेक्टेयर क्षेत्र को MMDR Act, 1957(यथा संशोधित 2015) की धारा–17A(1A) के तहत् खनिज लौह अयस्क के खनिपट्टा स्वीकृति हेतु दिनांक 21.11.2019 को आवेदन प्रस्तुत किया गया, जिसे संचालक भौमिकी तथा खनिकर्म, छत्तीसगढ़ ने अपने प्रस्ताव दिनांक 29.04.2020 द्वारा इस्त विभाग को प्रेषित किया।

2.11 उपरोक्त के परिप्रेक्ष्य में विभागीय समसंख्यक पत्र दिनांक 02.12.2020 द्वारा एनएमडीसी–सीएमडीसी लिमिटेड (एनसीएल) के पक्ष में पैरा–2.9 की तालिका में उल्लेखित क्षेत्र पर MMDR Act, 1957 (यथा संशोधित 2015) की धारा–17A(2A) के तहत 05 वर्ष की अवधि के लिए खनिज लौह अयस्क का खनिपट्टा स्वीकृति का सैद्धांतिक निर्णय लिया जाकर क्षेत्र में खनन कार्य हेतु वन संरक्षण अधिनियम, 1980 एवं पर्यावरण संरक्षण अधिनियम, 1986 के तहत आवश्यक वन एवं पर्यावरणीय अनुमति प्राप्त कर इस विभाग को प्रस्तुत करने की अनुमति प्रदान की गई है।

2.12 एनसीएल के द्वारा दिनांक 28.08.2020 को इस विभाग को पत्र प्रेषित कर प्रस्तावित **LoI** (खनिपट्टा स्वीकृति हेतु आशय–पत्र) के परिप्रेक्ष्य में अनुरोध किया गया कि विषयांकित क्षेत्र का खनिपट्टा स्वीकृति हेतु जारी किये जाने वाले आशय पत्र में एनएमडीसी के द्वारा प्रस्तावित क्षेत्र को किये गये डीजीपीएस सर्वेक्षण से प्राप्त को–ऑर्डिनेट्स एवं भारत सरकार के द्वारा जारी अधिसूचना में दर्शित को–ऑर्डिनेट्स में विभिन्नता पाये जाने के कारण तथा डीजीपीएस सर्वेक्षण से प्राप्त को–ऑर्डिनेट्स वैज्ञानिक व तकनीकि रूप से सामान्य को–ऑर्डिनेट्स से अधिक उपयुक्त एवं त्रुटियों से रहित होने के फलस्वरूप डीजीपीएस को–ऑर्डिनेट्स के आधार पर खनिपट्टा स्वीकृति हेतु आशय पत्र जारी किये जाने हेतु इस विभाग से अनुरोध किया गया।

2.13 उक्त पत्र में निहित तथ्यों का परीक्षण किये जाने उपरान्त तथा जारी अधिसूचना व एनएमडीसी के द्वारा प्रस्तावित क्षेत्र को डीजीपीएस को–ऑर्डिनेट्स मं व्यापक भिन्नता होने के फलस्वरूप भारत सरकार, खान मंत्रालय की अधिसूचना दिनांक 30.09.2019 में आवश्यक संशोधन हेतु विभागीय समसंख्यक पत्र दिनांक 26.12.2019 के माध्यम से भारत सरकार, खान मंत्रालय को प्रस्ताव प्रेषित किया गया तथा पुराने वन कंपार्टमेंट के स्थान पर नये वन कंपार्टमेंट नंबरों के आधार पर संशोधन करते हुए इस विभाग के प्रस्ताव पत्र दिनांक 26.12.2020 पर यथोचित कार्यवाही किये जाने हेतु विभागीय समसंख्यक पत्र दिनांक 26.03.2021 द्वारा भारत सरकार, खान मंत्रालय को प्रेषित किया गया।

2.14 भारत सरकार, खान मंत्रालय के पत्र क्रमांक 4/2/200–M.VI, दिनांक 09.04.2021 के द्वारा अवगत कराया गया कि इस विभाग के प्रस्ताव दिनांक 26.12.2020 एवं संशोधित पत्र दिनांक 26.03.2021 में निहित तथ्यों के परिप्रेक्ष्य में भारत सरकार, खान मंत्रालय की अधिसूचना दिनांक 30.09.2019 में आवश्यक संशोधन किया जाकर G.S.R. No. 119(E), दिनांक 18.02.2021 को संशोधित अधिसूचना जारी कर दिया गया है।

2.15 भारत के राजपत्र प्रकाशन G.S.R. No. 119(E), दिनांक 18.02.2021 को संशोधित अधिसूचना के परिपालन में मेसर्स एनएमडीसी–सीएमडीसी (एनसीएल) के पक्ष में MMDR Act, 1957 की धारा–17A(1A) के तहत् बैलाडीला डिपॉजिट क्रमांक–4 के कुल रकबा 646.596 हेक्टेयर के निम्नलिखित क्षेत्र को 05 वर्ष की अवधि के लिए खनिज लौह अयस्क के पूर्वेक्षण अथवा खनन प्रचालन करने के लिए आरक्षित किया गया है :–

खनिज का नाम	स्थिति	क्षेत्र	पिलर	अक्षांश	देशांतर
1.	2.	3.	A	81°12'03.25650"E	18°43'38.32617"N
लौह अयस्क	बैलाडीला आरक्षित वन निक्षेप क्रमांक–4 जिला दक्षिण बस्तर दंतेवाड़ा, छत्तीसगढ़	646.596 हेक्टेरयर	B	81°13'04.84428"E	18°43'38.52758"N
			C	81°13'06.24991"E	18°43'12.30677"N
			D	81°13'03.60782"E	18°43'12.27943"N
			E	81°13'07.02661"E	18°41'26.17920"N
			F	81°12'31.89279"E	18°41'48.22195"N
			G	81°12'02.90192"E	18°41'50.38796"N

2.16 एनसीएल के पत्र दिनांक 19.03.2021 के साथ वन मंडलाधिकारी जिला दक्षिण बस्तर दंतेवाड़ा के पत्र दिनांक 26.02.2021 अनुसार खनिपट्टा स्वीकृति हेतु प्रश्नाधीन क्षेत्र का विवरण निम्नानुसार है :–

क्र.	वनमंडल का नाम	वन कक्ष क्रमांक (पुराना)	वन कक्ष क्रमांक (नया)	कुल रकबा (हे. में)	खनिपट्टा हेतु प्रस्तावित रकबा (हे. में)
1.	2.	3.	4.	5.	6.
1	दक्षिण परिक्षेत्र बचेली	665	1832	273.155	9.052
2		664	1833	190.017	104.332
3		663	1886	368.585	45.239
4		662	1885	389.901	160.862
5		666	1834	212.612	140.372
6		659	1842	193.670	32.917
7		667	1841	316.004	153.310
8		676	1826	232.561	0.512
			योग	2176.505	646.596

3/ भारत सरकार, खान मंत्रालय, नई दिल्ली द्वारा जारी अधिसूचना दिनांक 18.02.2021 अनुसार शासकीय उपक्रम की कंपनी मेसर्स एनएमडीसी–सीएमडीसी लिमिटेड (एनसीएल) के पक्ष में MMDR Act, 1957 (यथा संशोधित 2015) की धारा–17A(1A) के तहत् बैलाडीला डिपॉजिट क्रमांक–4 के कुल रकबा 646.596 हेक्टेयर क्षेत्र को 05 वर्ष की अवधि के लिए खनिज लौह अयस्क का पूर्वेक्षण अथवा खनन प्रचालन करने के लिए आरक्षित किया गया है। क्षेत्र में मेसर्स एनएमडीसी लिमि. के पक्ष में पूर्वेक्षण अनुज्ञप्ति स्वीकृत था। पूर्वेक्षण कार्य के आधार पर एनएमडीसी ने क्षेत्र पर 107 मिलियन टन लौह अयस्क के माइनेबल भण्डार प्रमाणित किये है। प्रश्नाधीन क्षेत्र में लौह अयस्क खनन हेतु भारतीय खान ब्यूरो, नागपुर ने पत्र दिनांक 26.07.2013 द्वारा मायनिंग प्लान अनुमोदित किया गया है।

4/ अतः उपरोक्त तथ्यों के प्रकाश में एनएमडीसी–सीएमडीसी लिमिटेड (एनसीएल) के पक्ष में पैरा–2.15 एवं 2.16 की तालिका में उल्लेखित क्षेत्र पर MMDR Act, 1957 (यथा संशोधित 2015) की धारा–17A(2A) के तहत 05 वर्ष की अवधि के लिए खनिज लौह अयस्क का खनिपट्टा स्वीकृति का सैद्धांतिक निर्णय लिया जाकर क्षेत्र में खनन कार्य हेतु वन संरक्षण अधिनियम, 1980 एवं पर्यावरण संरक्षण अधिनियम, 1986 के तहत आवश्यक वन एवं पर्यावरणीय अनुमति प्राप्त कर इस विभाग को प्रस्तुत करने की अनुमति प्रदान की जाती है।

5/ वन संरक्षण अधिनियम, 1980 एवं पर्यावरण संरक्षण अधिनियम, 1986 के तहत जारी की जा रही इस अनुमति से उपर्युक्त आवेदित क्षेत्र पर प्रवेश करने या खनन कार्य करने का कोई अधिकार कंपनी को प्राप्त नहीं होगा।

संलग्नः–नक्शा।

26/06/2021

(कुन्दन कुमार बंजारे)
अवर सचिव
छत्तीसगढ़ शासन,
खनिज साधन विभाग

पृ0क्रमांक एफ 2–20/2005/12, नवा रायपुर, अटल नगर दिनांक

प्रतिलिपि :–

1. सचिव, भारत सरकार, खान मंत्रालय, शास्त्री भवन, नई दिल्ली।
2. सचिव, भारत सरकार, वन एवं पर्यावरण मंत्रालय (एफसी डिवीजन) पर्यावरण भवन सीजीओर काम्प्लेक्स, लोधी रोड, नई दिल्ली।
3. सदस्य सचिव, छत्तीसगढ़ पर्यावरण संरक्षण मंडल, पर्यावास भवन, सेक्टर–19, नवा रायपुर अटल नगर, छत्तीसगढ़।
4. क्षेत्रीय खान नियंत्रक, भारतीय खान ब्यूरो, दूसरी मंजिल, जीएसआई फील्ड प्रशिक्षण केन्द्र, महालेखाकार ऑफिस कॉम्पलेक्स, पोस्ट विधान सभा, रायपुर, छत्तीसगढ़।
5. महानिदेशक, सेफ्टी ऑफ माईन्स, सीपत रोड, बिलासपुर, छत्तीसगढ़,
6. संचालक, भौमिकी तथा खनिकर्म, इन्द्रावती भवन, नवा रायपुर अटल नगर, छत्तीसगढ़।
7. अध्यक्ष सह प्रबंध निदेशक, एन.एम.डी.सी. लिमिटेड, खनिज भवन 10–3–311/ए, कैस्टल हिल्स मासाब टैंक, हैदराबाद।
8. अतिरिक्त प्रधान मुख्य वन संरक्षक (भू–प्रबंध), नोडल अधिकारी वन संरक्षण अधिनियम, 1980 छत्तीसगढ़ अरण्य भवन, जेल रोड़, रायपुर।
9. प्रबंध संचालक, छत्तीसगढ़ मिनरल डेव्हलपमेंट कार्पोरेशन लिमिटेड, सोनाखान भवन, रिंग रोड, रायपुर, छत्तीसगढ़,
10. कलेक्टर, जिला–दक्षिण बस्तर दंतेवाड़ा, छत्तीसगढ़

की ओर आवश्यक कार्यवाही हेतु सूचनार्थ।

11. गार्ड फाईल।

हस्ता/–
अवर सचिव
छत्तीसगढ़ शासन
खनिज साधन विभाग

NATIONAL STEEL POLICY 2017

1. Introduction

1.1. Steel is a product of large and technologically complex industry having strong forward and backward linkages in terms of material flows and income generation. It is also one of the most important products of the modern world and of strategic importance to any industrial nation. From construction, industrial machinery to consumer products, steel finds its way into a wide variety of applications. It is also an industry with diverse technologies based on the nature and extent of raw materials used. In India, steel has an output multiplier effect of nearly 1.4X on GDP and employment multiplier factor of 6.8X.

1.2. A vibrant Steel industry has historically been the foundation of a nation's rapid Industrial Development. On account of rapid industrial development, from a small capacity of 22 MT in FY 1991-92 prior to deregulation, India has become the 3rd largest steel producer in the world with a production of 90 MT and a capacity of 122 MT in FY 2015-16. Today, the Indian steel industry contributes approximately 2% to the country's GDP and employs about 5 lakh people directly and about 20 lakh people indirectly[1]. The National Steel Policy 2017 (NSP 2017) is an effort to steer the industry to achieve its full potential, enhance steel production with focus on high end value added steel while being globally competitive.

1.3. The National Steel Policy 2005 (NSP 2005) sought to indicate ways and means of consolidating the gains flowing out of the then economic order and charted out a road map for sustained and efficient growth of the Indian steel industry. However, the unfolded developments in India as also worldwide, both on the demand and supply sides of the steel market, have warranted a relook at the different elements of the NSP 2005.

1.4. India's competitive advantage in steel production is driven, to a large extent, from the indigenous availability of high grade iron ore and non-coking coal – the two critical inputs of steel production. In addition, it also has a vast and rapidly growing market for steel, strong MSME sector and a relatively young work force with competitive labour costs.

1.5. Driven by the positive demand outlook and prevailing high prices of steel in the period post 2004, the Indian steel sector witnessed a wave of investments in the

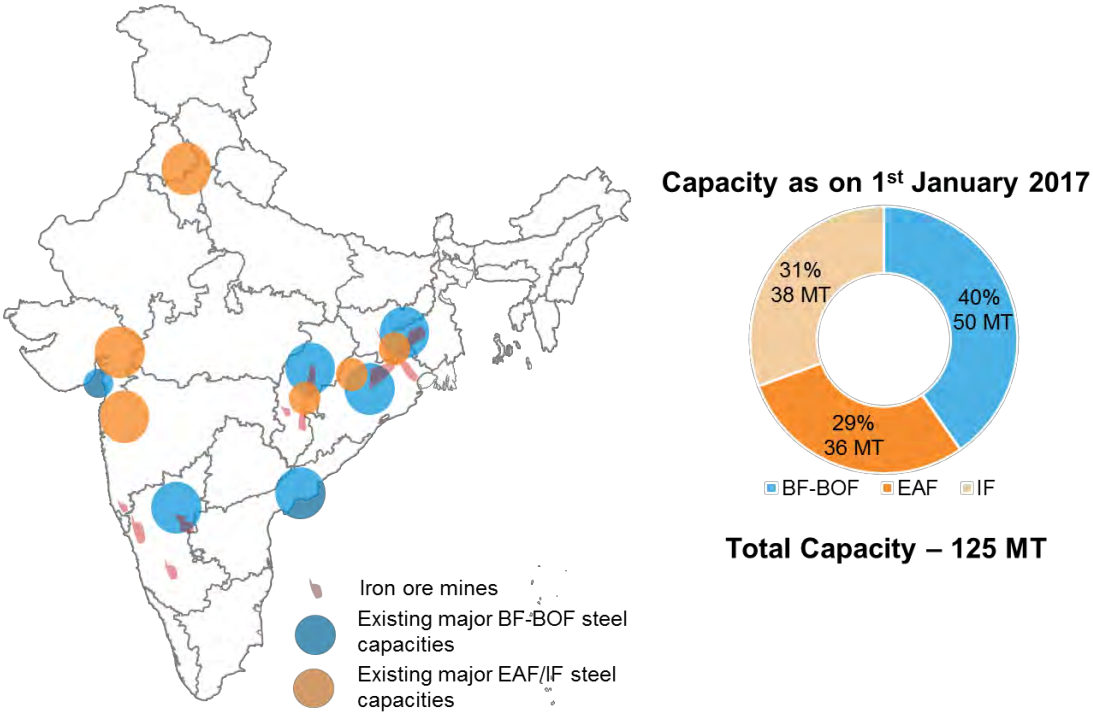
[1] As per the MECON Estimates

states of Odisha, Jharkhand, Karnataka and Chhattisgarh. Substantial new capacity was created and existing plants were modernized. A significant portion of these investments were funded by banks and other forms of borrowings.

1.6. India became the 3rd largest producer of steel in 2015 and is now well on track to emerge as the 2nd largest producer after China. There is significant potential for growth given the low per capita steel consumption of 61 Kg in India, as compared to world average of 208 Kg. Indian economy is rapidly growing with enormous focus on infrastructure and construction sector. Several initiatives mainly, affordable housing, expansion of railway networks, development of domestic shipbuilding industry, opening up of defence sector for private participation, and the anticipated growth in the automobile sector, are expected to create significant demand for steel in the country. Further, while the main focus of the industry is on the domestic market, being in close vicinity of the developed west and developing east, provides it a strategic location that augurs well for the industry seeking opportunities for exports of finished goods and imports of some scarcely available raw materials.

1.7. The Indian steel industry is structured in between three broad categories based on route wise production viz. BF-BOF, EAF and IF. BF-BOF route producers have large integrated steel making facilities which utilize iron ore and coking coal for production of steel. Unlike other large steel producers, the Indian steel industry is also characterized by the presence of a large number of small steel producers who utilize sponge iron, melting scrap and non-coking coal (EAF/IF route) for steelmaking. As on March 2016, there were 308 sponge iron producers that use iron ore/ pellets and non-coking coal/gas providing feedstock for steel production; 47 electric arc furnaces & 1128 induction furnaces that use sponge iron and/or melting scrap to produce semi-finished steel and 1392 re-rollers that rolls out semi-finished steel into finished steel products for consumer end use.

Figure 1: Current steel footprint in India



Source: Ministry of Steel, JPC

1.8. Over the past two decades, the Indian steel industry has developed capabilities of producing a wide range of value added steel at par with global best practices addressing diverse needs of the end user industries. However, India still needs to make a special effort to domestically produce number of value added products like automotive steel for high end applications, electrical steel (CRGO), special steel and alloys for Power equipment, Aerospace, Defense and Nuclear applications.

1.9. However, the Indian steel sector is disadvantaged due to limited availability of some of the essential raw material such as high grade lumpy Manganese ore & Chromite, coking coal, steel grade limestone, refractory raw material, Nickel, Ferrous Scrap etc. Due to shortage of domestic coking coal, both in terms of quantity and quality, pig iron producers/ BF operators in India have to significantly depend on import of coking coal.

1.10. In the recent past, multiple issues have also adversely impacted the steel sector, viz. cancellations of iron ore and coal mine allocations, delays in land acquisition, environmental clearances, which led to many of the projects facing significant cost and time overruns. Additionally, companies also faced substantially increased operating costs on account of increased logistics & raw material costs and other charges.

1.11. Post 2011, global prices of steel began to decline, marking the beginning of a down turn in the global steel industry triggered by slowdown in global demand and over capacities in a number of countries including China. By July 2015, prices had fallen by 50% compared to January 2011 - their lowest in decades, as cheap imports flooded world steel markets. This significant structural asymmetry between demand and supply also affected large number of Indian companies leading to surge in imports resulting in weak pricing conditions, low profitability, lower capacity utilization and even closure of capacities in some cases.

1.12. In the new environment, the industry has to be steered with appropriate policy support to ensure that production of steel matches the anticipated pace of growth in consumption. Special emphasis is needed to ensure that the industry follows a sustainable path of development in respect of environmental friendliness, mineral conservation, quality of steel products, use of technology and indigenous R&D efforts to ensure that the country can, over time, reach global efficiency benchmarks to become a world leader in steel production technology, as well as in production of high end steel.

2. NSP 2017 – Vision, Mission & Objectives

a) **Vision:** To create a technologically advanced and globally competitive steel industry that promotes economic growth.

b) **Mission:** Provide environment for attaining –

i. Self-sufficiency in steel production by providing policy support & guidance to private manufacturers, MSME steel producers, CPSEs & encourage adequate capacity additions.
ii. Development of globally competitive steel manufacturing capabilities
iii. Cost-efficient production and domestic availability of iron ore, coking coal and natural gas
iv. Facilitate investment in overseas asset acquisitions of raw materials.
v. Enhance domestic steel demand.

c) **Objectives:** The National Steel Policy aims at achieving the following objectives –

i. Build a globally competitive industry
ii. Increase per Capita Steel Consumption to 160 Kgs by 2030-31
iii. To domestically meet entire demand of high grade automotive steel, electrical steel, special steels and alloys for strategic applications by 2030-31
iv. Increase domestic availability of washed coking coal so as to reduce import dependence on coking coal from ~85% to ~65% by 2030-31
v. To have a wider presence globally in value added/ high grade steel
vi. Encourage industry to be a world leader in energy efficient steel production in an environmentally sustainable manner.
vii. Establish domestic industry as a cost-effective and quality steel producer
viii. Attain global standards in Industrial Safety and Health
ix. To substantially reduce the carbon foot-print of the steel industry

3. The current context and the long term perspectives on growth

3.1. The domestic demand backed growth of the Indian economy and consequently the steel consuming sectors has been a key trait of Indian steel industry. The decade before the liberalization of the Indian steel industry in 1991 witnessed growth in crude steel production at a CAGR of 5.2%. Post liberalization, witnessed a decadal CAGR of 6.1% which accelerated to 8.3% during 2000-01 to 2015-16.

3.2. However, today the steel industry in India faces challenging external conditions manifest in slow economic growth and idle steel capacity globally. With weak global economic prospects, the Indian steel industry will have to strongly depend on the growth of domestic consumption for its future.

4. The Policy

NSP 2017 covers the following policy areas –

a. **Steel Demand**
b. **Steel Capacity**
c. **Raw Materials**
d. **Land, Water and Power**
e. **Infrastructure & Logistics**
f. **Product Quality**
g. **Technological Efficiency**
h. **MSME Sector**
i. **Value Addition in Stainless Steel**
j. **Value Addition in Alloy & Special Steel**
k. **Environment Management**
l. **Safety**
m. **Trade**
n. **Financial Risks**
o. **Role of CPSEs & Way Forward**
p. **Focus on High-End Research: Steel Research & Technology Mission of India**

4.1. Steel Demand

4.1.1. In 2015, India was the only large economy in the world where steel demand continued to demonstrate positive growth at 5.3 %, as against negative growth in China -5.4%, and Japan -7.0%. India's growing urban infrastructure and manufacturing sectors indicate that demand is likely to remain robust in the years ahead. If India is to achieve the goal of being a "developed nation", the steel industry must play a crucial role as has been the case with all the major developed countries and East Asian countries like Japan, South Korea and China.

4.1.2. Notwithstanding the current challenges, Indian steel industry still has significant potential for growth, underscored by the fact that the per capita steel consumption in the country at 61 kg (incl. rural consumption at 10 kg) is much lower than the global average of 208 kg. Going forward, the accelerated spend in infrastructure sector, expansion of railways network, development of domestic shipbuilding industry, opening up of defence sector for private participation, anticipated growth in automobile and capital goods industry and the construction in urban & rural areas, are expected to create significant demand for steel in the country.

4.1.3. Growth in steel consumption in a country is typically linked to the economic growth and steel intensity. While growth in GDP is a crucial determinant of growth in overall consumption, steel intensity is the definitive parameter for an economy and determines the growth rate of steel demand vis-à-vis consumption over time.

4.1.4. It is expected that at the current rate of GDP growth, the steel demand will grow threefold in next 15 years to reach a demand of 230 MT by 2030-31 as illustrated in **Annexure I.** However, even with this demand of finished steel by 2030-31, India's per capita consumption would reach only to 158 Kgs, lower than the current global average of 208 kg (**Annexure II).**

4.1.5. Creation of steel demand in the country is one of the major task to be undertaken in this direction. To drive steel demand, Ministry has identified construction and manufacturing sectors like Rural development, Urban infrastructure, Roads & Highways, Railways etc. to be the key focus areas and will take necessary steps to achieve the same through following –

4.1.5.1. Steel structures are highly cost effective and have shorter lead time for erection and have greater durability with high design comfort. Hence usage of steel needs to be encouraged in all buildings and structures. Efforts will be made to emphasize the lower lifecycle costing while evaluating projects rather than

looking at just the upfront cost in isolation, which would encourage greater usage of steel in Government as well as the private sector.

4.1.5.2. The Government has chalked out an extremely ambitious plan of Housing for all by 2022 as well as schemes such as Pradhan Mantri Awas Yojna, Saansad Adarsh Gram Yojna etc. These provide a huge opportunity for use of steel intensive structures and designs, usage of pre-fabricated and precast steel structures, etc. Hence, Ministry will take all necessary measures to promote the increased usage of steel intensive structures/designs under these schemes.

4.1.5.3. Commercial, Residential buildings and flyovers also provides immense opportunities. Necessary efforts will be made in conjunction with Ministry of Road, Transport & Highways to evaluate the replacement benefits of the existing bridges, pavements and crash barriers used in Roads & Highways and consider for projects in steel bridges, steel reinforced pavements and steel crash barriers respectively.

4.1.5.4. Usage of steel in railways is limited to laying of railway tracks, rolling stocks, wagons, platforms and coaches. Efforts will be made to increase the steel usage in making railway station, foot over bridges, rail coaches, construction of steel based railway colony buildings especially in seismic prone areas, construction of dedicated freight corridors & superfast rail corridors and construction of more steel bridges for saving time & capital expenditure.

4.1.6. The **"Make in India"** initiative is expected to witness significant investments in Construction, Infrastructure, Automobile, Shipbuilding and Power sectors, which will stimulate steel demand. Hence, efforts will be made to pass on such benefit to the domestic steel producers. Use of cost efficient and competitive **'Indian Made steel'** will pave the way for infrastructure development and construction activities in the country.

4.2. Steel Capacity

4.2.1. It is anticipated that a crude steel capacity of 300 MT will be required by 2030-31, based on the demand projections as mentioned above. However, achieving crude steel capacity up to 300 MT will require extensive mobilization of natural resources, finances, manpower and infrastructure including land.

4.2.2. Considering the competitive advantage of steel production in India, the country also has the potential to export sufficient quantities of steel and become a major player in the global market, thus mitigating the foreign exchange risk emanating

out of the exposure of the industry to the global raw materials market especially for coking coal.

4.2.3. BF-BOF route is expected to contribute about 60 - 65% of the crude steel capacity & production with remaining 35 – 40% by EAF & IF route in 2030-31.

4.2.4. Demand for pig iron for merchant use, such as for castings and supplementary metallic in the electric arc or induction furnaces, is projected to increase to 17 MT by 2030-31. Similarly, demand for sponge iron is projected to increase to 80 MT by 2030-31 as illustrated in Annexure I. It is projected that the sponge iron capacity may increase to 114 MT[2] by 2030-31 with around 30% share of gas based capacities under increased environmental considerations and long term availability of gas.

4.2.5. Creation of additional capacity for fulfilling the anticipated demand will require significant capital investment of about Rs. 10 lakh Crore by 2030-31 and will also generate significant employment in the range of 36 Lakhs by 2030-31 from the current level of 25 Lakhs depending on degree of automation resulting from adoption of different technologies.

4.2.6. In order to ensure optimal growth of the industry and to avoid situations of over or under capacity, the Ministry will work with all the stakeholders to monitor investments in the steel industry on a continuous basis and will also facilitate setting up of SPVs in mineral rich states of Odisha, Chhattisgarh, Jharkhand and Karnataka.

4.2.7. Establishment of steel plants along the coast under the aegis of Sagarmala project will be undertaken. Such plants would be based on the idea of importing scarce raw materials and exporting steel products. The Ministry will also promote cluster based approach particularly in MSME steel sector with common infrastructure on consortium approach for optimum land use, easy availability of raw materials and economies of scale.

4.2.8. Necessary policy environment will also be provided to promote gas based steel plants, electric steelmaking, auxiliary fuel injection in blast furnace and other technologies which will bring down usage of coking coal in steel production. Efforts will also be made to facilitate alternate route for steelmaking using indigenous coal with increased focus on improving energy efficiency and reducing GHG emissions.

[2] Projection of Sponge Iron Capacity represent the mean value based on the premise that 60-65 % of steel production in 2030-31 shall be coming through BF-BOF route and rest through EAF/IF route.

4.2.9. Induction Furnace route of steelmaking has a number of advantages for India, namely, no requirement of coking coal, lower capital cost and smaller land requirement. This route of steelmaking is however hampered in terms of its refining capabilities. Hence, appropriate efforts will be made to promote development of consistent & cost-effective refining methods in order to produce high quality steel.

4.3. Raw Materials

Availability of raw materials at competitive rates is imperative for the growth of the steel industry. Details of the estimated raw material requirement by 2030-31 for the steel industry have been provided in **Annexure III.**

4.3.1. Iron Ore

4.3.1.1. The government has already come up with Mines and Minerals (Development and Regulation) Amendment Act, 2015 which gives greater emphasis on time bound mine development and increased stress on mineral exploration and sustainable mining operations. The Act has brought clarity on mine allocation process (through auction) and procedure for mining lease renewal and provides for reservation of any particular mine for a particular end use and put conditions permitting auction among such eligible end users.

4.3.1.2. As and when mining leases expires, suitable efforts will be made in conjunction with Ministry of Mines to facilitate auction of mineral blocks in a regular manner. Ministry will also facilitate to develop robust plans to guide future leases for start of mineral production in time bound manner in order to ensure adequate availability of iron ore.

4.3.1.3. Utilization of low grade fines lying at mine sites of captive iron ore miners will be promoted and any regulatory changes that may be required will be evaluated in conjunction with concerned ministries. Beneficiation and agglomeration industries would be strengthened through suitable support.

4.3.1.4. Transportation of iron ore fines to pelletisation units will be targeted through **slurry pipelines and conveyors** as it will reduce pollution and de-congest transportation infrastructure in mining areas. To encourage this environment friendly transportation, Ministry of Steel will pursue timely completion of on-going **slurry pipeline** projects and their further expansion in the coming years.

4.3.1.5. To ensure long term supply of iron ore, intensive & deeper exploration would be promoted to augment resource base. Eco-friendly viable underground mining

technique for optimal utilization of magnetite ore deposits locked in Western Ghats would also be explored in conjunction with mining research institutes.

4.3.1.6. In order to develop a strategic footprint in the global natural resource industry, acquisition of mineral assets overseas will also be facilitated through bilateral talks with the prospective nations. Steel sector players will be encouraged to acquire and develop global projects individually or on partnership basis.

4.3.1.7. Ministry of Steel in conjunction with Ministry of Mines, will facilitate creation of a uniform country-wide sales platform for bringing transparency and predictability in the process of sale of iron ore.

4.3.2. **Iron Ore Pellets**

4.3.2.1. During mechanized mining, 60 to 70% output is generated as fines below 10 mm size. Fines are also generated during transportation and handling. To economically utilize these fines, suitable agglomeration process is necessary for converting them into sinters or pellets.

4.3.2.2. Till the recent past, domestic steel industry was mainly using higher grades of iron ore and a higher proportion of lumps due to their easy accessibility and availability. However, there is a pressing need to utilize low grade iron ores including slimes and dump fines which are stockpiled at different mine heads. Hence, optimal use of existing low grade iron ore resources with special emphasis on conservation of high grade ores will be encouraged. As of 2015-16, there exists pelletisation capacity of about 85 MT with a capacity utilization 32.5%. Impetus will be given to **Pellet industry** as it helps in mineral conservation by acting as direct feedstock in Blast Furnace in place of high grade iron ore.

4.3.3. **Coking Coal & Non-Coking Coal**

4.3.3.1. About 85% of the coking coal requirement of the domestic steel industry is presently being met through imports. Ministry of Steel will coordinate with Ministry of Coal to increase availability of coking coal through **overseas asset acquisition** and will also ensure that **sufficient number of modern coking coal Washeries get established**. Suitable fiscal measures will also be taken to support the rising requirement in the steel sector.

4.3.3.2. Furthermore, deliberations will be held with Ministry of Coal to persuade CIL to create special coal linkage e-auction window for steel players to ensure supply of coal to steel sector. Ministry of Steel will also facilitate periodic auction of coking coal blocks as it will encourage the steel industry to develop its own dedicated coking coal mines.

4.3.3.3. Efforts will also be made to facilitate allocation of indigenous coking coal reserves in the country exclusively to steel sector with no diversion of such coal to any other sector.

4.3.3.4. To ensure long term availability of coking coal, Ministry of Steel in conjunction with Ministry of Coal will facilitate exploration & optimal utilization of deep seated coking coal reserves. Efforts will also be made to expeditiously implement Jharia Action Plan to improve the domestic availability of coking coal.

4.3.3.5. Integrated steel plants will also be pursued to reduce their coking coal consumption at par with global best practices by resorting to auxiliary fuel injection technologies like Pulverized Coal Injections (PCI)/ Cold Dust Injection (CDI) or natural gas/ syngas injection along with PCI/ CDI.

4.3.4. **Natural Gas**

4.3.4.1. Under the Paris Treaty (COP 21), India intends to reduce the emission intensity of its GDP by 33-35% by 2030 from 2005 levels. In order to achieve this target, India needs to find energy efficient resources that are affordable and also available. Natural Gas is one such greener alternatives available.

4.3.4.2. Given the future potential of gas based technology, in terms of up-gradation of coal based DRI capacities in the MSME sector to gas based route, need for captive gas based power plants for the sector and the alternative of injecting natural gas in blast furnace to reduce dependence on imported metallurgical coal (both coking and PCI), ensuring firm supply of natural gas is imperative to boost the confidence and investment in the gas based steelmaking technology.

4.3.4.3. In case of gas based steel plants which have been stranded due to lack of supply of natural gas from domestic sources, options will be evaluated in coordination with Ministry of Petroleum and Natural Gas for restoration of domestic gas supply to steel sector. Efforts will also be made to remove the cascading effect of anomalies in the tax structure.

4.3.4.4. To ensure long term availability of natural gas, Ministry of Petroleum & Natural Gas will be approached to explore new reserves of natural gas. The technology of coal gasification to produce syngas for subsequent usage in DRI plants would also be encouraged.

4.3.5. **Limestone, Manganese Ore and Chromite Ore**

4.3.5.1. Ministry will suitably facilitate the increased exploration efforts to raise resources of limestone, manganese and chromite ore in the country. In the case of steel grade limestone, high grade low phosphorus manganese ore and high grade chromite lumpy ore, the steel industry is likely to remain dependent on imports. Suitable measures will be taken to encourage imports of these materials since they are available in limited quantities. Ministry will also facilitate in exploring the possibility of optimally utilizing the high grade limestone available in Himachal Pradesh and Rajasthan in an environmentally sustainable manner. The industry will also be encouraged to acquire such assets globally to maintain a steady supply of these materials to the growing industry. Necessary efforts will be made for greater exploration of manganese and chromite ore.

4.3.6. **Ferro-Alloys**

4.3.6.1. Ferro-alloy is a power intensive industry. Hence, captive power generation in the ferro-alloys plants will be extensively supported. Since the demand for ferro-alloys is likely to grow along with steel production in the country, the industry may be encouraged to set up larger units to achieve adequate economies of scale. Efforts will be made to provide necessary raw materials linkages and stable supply of power to grow Ferro-alloys units on priority.

4.3.7. **Refractory Raw Material**

4.3.7.1. India is not endowed with high quality reserves of key refractory raw materials viz. bauxite (refractory grade) and magnesite and is largely dependent on imports. Suitable measures and procedural simplifications will be done to support the rising requirement of refractories in the steel sector.

4.3.7.2. Geologically, fire clay, an important raw material for making refractories, exists concurrently with coal deposits. However, there have been difficulties in full utilization of the domestic resources found alongside coal deposits. The potential of fire clay extraction will be examined in order to raise supplies of the same to the domestic industries.

4.3.8. **Nickel**

4.3.8.1. Nickel has been under constant demand from the ferro-alloys and alloy / stainless steel industry. Nickel is practically unavailable in the country and the entire quantity of unwrought and other forms of the nickel needs to be imported. Hence, the industry may be encouraged to acquire such assets globally to maintain a steady supply to the industry. Simultaneously, R&D will be pursued to extract Nickel from the lateritic ore overburden available in Sukinda Valley, Orissa.

4.3.9. **Ferrous Scrap**

4.3.9.1. In order to promote use of scrap based steelmaking technologies inter-alia to reduce GHG emission intensity in the country, actions will be initiated to increase availability of ferrous scrap. Options will also be evaluated in coordination with other concerned ministries to develop a scrap segregation (quality-wise), collection, processing and recycling policy.

4.3.9.2. In order to ensure availability of sufficient quantities of good quality scrap, establishment of an organized and environment friendly steel scrap processing units within the country will be facilitated by promoting modern steel shredding plants.

4.3.9.3. In order to promote increased use of scrap based steel-making in the country, efforts will be made in coordination with Ministry of Power to ensure availability of electricity to the sector.

4.4. Land, Water & Power

4.4.1. The growth plans of the Indian steel industry have also been hindered by difficulties in land acquisition. Many projects have stuck due to delays in acquisition of adequate land at the preferred locations due to policy and procedural issues. In order to reach crude steel capacity of about 300 MT, additional land requirement is estimated to be ~91,000 acres considering green field expansion. To help in early implementation of projects, Ministry will coordinate with respective State Governments to ensure timely availability of litigation-free lands to the industries.

4.4.2. The formation of steel clusters (especially for MSME steel units), service centers and steel processing centers will be facilitated. Creation of related common infrastructure on partnership basis will be promoted to optimize land use. Small and medium steel enterprises, including FDI projects, will be encouraged to be set up in industrial corridors and in clusters under PPP (Public Private Partnership) to ease land acquisition.

4.4.3. It has been observed that the water allocation for steel industry is generally accorded low priority. But it is forecast that by 2030-31, the steel industry will annually require approximately 1500 million cu. meter of water. Keeping this in view, the Ministry will coordinate with respective State governments to allocate water to steel projects on priority basis. Water conservation at all levels will be encouraged and the industry's efforts will be supported.

4.4.4. Considering the importance of water as a scarce resource, there has been a major thrust by the Government on reduction of discharge from the steel plants which will

require innovative solutions and techniques to effectively recycle treated waste water. Hence, the steel industry will be encouraged to pursue plans and strategies to reduce specific water consumption per tonne of steel produced.

4.4.5. Since steel is an energy intensive industry, Ministry will focus on availability of power to steel making facilities. The power required by the industry is estimated to increase to 27,717 MW by 2030-31. Post de-allocation of coal blocks, various units in steel sector, especially the sponge iron plants, have been procuring power at high cost. Ministry of Steel will deliberate with Ministry of Power to make power available to such units through open access.

4.4.6. Ministry of Steel will facilitate the use of waste heat recovery in Steel plants in consultation with other ministries. Efforts will also be made to facilitate usage of captive power for MSME sector and remove the cascading effect of anomalies in the tax structure.

4.4.7. In view of impending growth scenario in steel sector, Ministry of Steel will facilitate mechanism of Special Purpose Vehicles (SPVs) for Greenfield capacity additions. Steel SPV would acquire the land, get the necessary statutory approvals, water linkage and iron ore linkage and develop the minimum necessary infrastructure for setting up of steel plants. The Steel SPV would thereafter be put to open bidding in a transparent manner for setting up of the steel plant by interested parties. Similarly, the mining SPV will provide long term iron ore linkage to the Steel SPV.

4.5. Infrastructure & Logistics

4.5.1. Since bulk of the capacity additions are likely to come up in the three eastern states of Odisha, Chhattisgarh and Jharkhand, Ministry of Steel will pursue for the adequate and timely infrastructure growth in these regions to address the increased industry requirement in areas such as **railways, roadways, power generation and distribution etc**.

4.5.2. With the increase in steel demand and production, the requirement of adequate infrastructure will further increase. Government will need to invest heavily in development of **evacuation infrastructure** to minimize turn-around-time as well as to build the necessary linkages to reduce the length of haulage. Ministry of Steel will also encourage steel players to **promote better plant layout design, engineering, technologies and optimum use of economic capacity**.

4.5.3. With plans to have large number of blast furnaces in future, the use of pellets shall also increase, requiring grinding of ores/fines to ultra-fine size, hence **increased**

investment in slurry pipelines. This will be encouraged through suitable policy support from the government.

4.5.4. Alternative modes for transportation of raw materials such as **slurry pipelines and conveyors** will go a long way in reducing the problems of pollution and congested transportation network in the mining areas. To encourage environment friendly transportation of raw material, efforts will be made to accord all the benefits available to the infrastructure industries, to slurry pipelines also.

4.5.5. Transportation of raw materials and finished goods through **inland waterways and coastal shipping** will also be promoted. Necessary efforts will be made in conjunction with Inland Waterways Authority of India along with other concerned ministries to facilitate debottlenecking of inland waterways transportation through dredging, modernization of jetties, simplifying the approval process for environmental clearances & coastal regulation zone (CRZ) clearances, improved connectivity with road through dedicated corridors and rail etc.

4.5.6. To encourage export opportunities and be competitive, the Government of India is contemplating **port-led development of steel clusters under the aegis of Sagarmala program**. Establishment of coast based steel plants will suitably be undertaken in conjunction with Ministry of Shipping.

4.5.7. Given the expected growth in demand in steel production and the corresponding requirement for raw materials, the port infrastructure in the country, especially at coking coal importing ports needs to be significantly strengthened. Such ports will be identified in conjunction with the steel industry and would be taken up with Ministry of Shipping to ensure uninterrupted supply of coking coal to steel industry.

4.6. Product Quality

4.6.1. Bureau of Indian Standards (BIS), has formulated a large number of Indian Standards for most of the iron and steel products produced in the country. Actual implementation of these standards by the industry is however limited, resulting in large scale production, imports and use of sub-standard material, putting infrastructure and public safety at risk.

4.6.2. **Quality Control Order:** Adoption of the standards by producers and users will be facilitated and mandatory quality certification will be ensured. Recently the Steel and Steel Products (Quality Control) Order and Stainless Steel (Quality Control) Order that mandates Bureau of Indian Standards certification for certain products was introduced. The implementation of this order will be closely monitored in

conjunction with Bureau of Indian Standards. Thirty Three (33) steel products have already been notified under the mandatory quality certification mark scheme of BIS. Efforts will be made to bring in additional steel products, which are used in critical end-use applications, under the mandatory scheme to ensure protection of human health, environment, and safety.

4.6.3. MSME sector units, particularly the small re-rolling mills and Induction Furnace Units lack in-house quality testing facilities. Quality testing facilities would be set up in steel hubs and already established facilities would be further strengthened to cater to possible rise in demand.

4.6.4. Apart from the adherence to conditions under Steel and Steel Products (Quality Control) Order, Ministry of Steel is also facilitating the production of quality steel, particularly in MSME sector by carrying out R&D and technological interventions and providing financial assistance. More steps in this direction will be encouraged.

4.7. Technological Efficiency

4.7.1. Though the choice of technology will be determined by entrepreneurs based on techno-economic considerations, Ministry of Steel would encourage adoption of technologies, which:

4.7.1.1. Are conducive to effective & efficient utilization of domestic resources with minimum damage to environment and production of high-end and special steel required for sophisticated industrial and scientific applications.

4.7.1.2. Minimize environmental damage at various stages of steel making.

4.7.1.3. Optimize resource utilization and facilitate modernization of the steel industry so as to achieve global standards of productivity and efficiency.

4.7.1.4. Led to the development of front end and strategic steel based materials.

4.7.2. Improving the techno-economic performance of steel units is crucial to improving competitiveness of the industry. Details of the estimated techno-economic performance parameters by 2030-31 for the steel industry have been provided in **Annexure IV**. Ministry of Steel, in association with suitable agency, will constantly monitor techno-economic performance of all the steel plants within the country vis-à-vis the global best practices. Furthermore, increased use of prepared burden in charge mix and greater use of PCI in blast furnaces will also be promoted.

4.7.3. Steel companies will be encouraged to have strategic joint ventures for production and development of technologically more advanced products. Transfer of

technology for production of Aautomotive steel and other special steels including Product Development/ Acquisition of Technology for Boiler Quality Plates and Alloy Steel Tube Material, Electrical Steel will be facilitated.

4.7.4. Ministry will encourage the research institutes within the country to develop less resource intensive and less energy intensive steelmaking technologies as well as new products.

4.8. MSME Steel Sector

4.8.1. India over the years has developed a strong MSME sector (comprising of DRI-EAF/IF route based steel producers and rolling mills) which is unique to India. It embodies the entrepreneurial and innovative strengths of Indian steel industry which turned the unavailability of coking coal – a key input for BF-BOF route into an opportunity.

4.8.2. However, there exists large variations amongst various units in terms of scale of operations, product-mix and technology. The MSME sector, including sponge iron industry, plays an important role in providing employment, meeting demand of some special products required in small volumes and local demand of steel in hinterlands. Apart from this, the sector is also highly export oriented which helps in earning foreign exchange for the country.

4.8.3. Various measures as mentioned below will be taken to improve the performance of MSME steel sector and sponge iron industry-

4.8.3.1. Availability of raw materials will be ensured by facilitating auction of non-coking coal exclusively for steel/ sponge iron sector and increasing the iron ore availability in the domestic market.

4.8.3.2. Adoption of energy efficient technologies in the MSME steel sector will be encouraged to improve the overall productivity & reduce energy intensity.

4.8.3.3. Small and medium iron and steel making units will be encouraged to be set up in the proposed industrial corridors and clusters for optimal utilization of land and reach economies of scale.

4.9. Value addition in Stainless Steel

4.9.1. Though India is 3rd largest producer of steel globally, it is still a net importer of stainless steel used in high-end applications. With increased demand of steel and need to build 200 MTPA additional capacity by 2030-31, considerable capacity addition of stainless will also be required. Like most segments of the Indian steel

sector, stainless steel industry has also been facing difficulty over the last 3-4 years. Today, the domestic stainless steel industry has a low capacity utilization of around 50% due to the surge in low priced imports and fall in prices. Hence, necessary efforts will be made to protect the existing & upcoming stainless steel facilities from unfair trade practices through suitable trade remedial measures.

4.9.2. Besides, price consideration, import of stainless steel takes place on quality considerations. Country is dependent on import of most of the super duplex, super austenitic and high alloyed varieties of stainless steel for stringent end use applications. Ministry will encourage steel producers to have strategic ventures in production and development of technologically more complex products including high end varieties of stainless steel.

4.9.3. To counter threats from competing materials, promotion of stainless steel through mass campaigns, particularly in rural areas will be encouraged. Greater use of stainless steel in residential or commercial constructions in coastal and earthquake prone areas of the country will also be promoted. Use of high quality stainless steel in drinking water pipelines, water storage, packaging of food grains etc. will be promoted to prevent intake of hazardous impurities.

4.10. Value addition in Alloy & Special Steel

4.10.1. While large varieties of value added steel products are now being produced indigenously but the country is still dependent on import of several high performance & value added steel products like electrical steel, automotive grade steel and steels for specialized use in defence, space and nuclear applications.

4.10.2. With better demand prospects and mega expansion plans in the pipeline, there is a need to sharpen the focus on alloy & special steels as it guarantees better premium to both steel makers and consumers. These products are mainly finished steel and are termed so depending on their treatment or their end use in automobile and consumer durable sectors. Hence, necessary efforts will be made to collaborate with foreign players for technical and strategic cooperation for this purpose.

4.10.3. For the past couple of years, demand for alloy & special steel, or value-added steel, with superior quality to meet stringent application norms of various market segments, has been growing. Future growth of Indian steel makers will also be driven by these value-added products. Production of these premium grade products will not only help them improve realizations but will also add to the topline growth of steelmakers. Hence, Ministry will encourage steel producers to have strategic ventures in production and development of these technologically

more complex products including high end varieties of alloy steel and electrical steel.

4.11. Environment Management

4.11.1. While steel companies are themselves addressing the energy & environment issues in the plants through technological upgradation/ modernisation, and/or diffusion of energy efficient & environment friendly technologies in the plants, Ministry will facilitate improvement in the energy & environment scenario of steel plants through various forums/ mechanisms.

4.11.2. Ministry will facilitate the formation of a forum to chalk out best practices and promote policies and programs that encourage and expedite the transition to a clean energy economy. Apart from the adherence to these stringent energy efficiency parameters, steel companies will also be encouraged to adopt best available technologies & practices to provide clean & green environment.

4.11.3. Energy & Environment management is an on-going process and is directly related to the technologies adopted by the iron & steel plants. So far, Ministry has successfully implemented certain mechanisms such as NEDO model projects in CPSEs and UNDP-AUSAID-MOS steel project in steel re-rolling mills to facilitate improvement in energy efficiency. Efforts will further be made to scale up these mechanisms with enlarged coverage in steel re-rolling mills and induction furnace units.

4.11.4. Considering all waste materials as an economic asset, Ministry will encourage the steel companies to develop a Waste Management Plan for additional impetus on zero-waste or complete waste recycling. Concrete efforts will further be made by Ministry to promote use of iron & steel slag in alternate uses like road making, rail ballast, construction material, soil conditioner etc. Simultaneously, steel plants will be pursued to set up SMS slag weathering/ steam ageing plants to enable them to supply processed/ sized SMS slag for road making, rail ballast etc.

4.11.5. Ministry of Steel will also facilitate the formulation and adoption of standards at par with global best practices with regard to particulate matter emissions, SOx & NOx, water consumption and zero or near zero liquid discharge.

4.11.6. India has recently signed Paris Declaration (COP 21) under which intends to reduce the emission intensity of its GDP by 33-35% by 2030 from 2005 levels. Towards this end, Ministry of Steel has already submitted the Intended Nationally Determined Contributions (INDC) for reducing GHG emissions in iron & steel

sector which inter-alia projects CO_2 emission of 2.2 – 2.4 tonnes per tonne of crude steel in BF-BOF route and 2.6 – 2.7 tonnes per tonne of crude steel in DRI-EAF route by the terminal year of 2030. Ministry will find ways and means in consultations with industry to achieve aforesaid standards at par with the global best practices to the extent possible.

4.11.7. Capacity additions through coal based routes will have far reaching implications for India in terms of environmental degradation. Hence, necessary efforts will be made to have a judicious mix of production routes to reduce the carbon footprint of steel sector in line with the INDC targets.

4.12. Safety

4.12.1. Ministry of Steel will continuously monitor the safety performance of all its steel companies including those in private sector through periodic reviews. Necessary efforts will be made to encourage the development of clearly defined safety standards and goals to become a zero accident workplace.

4.12.2. Ministry of Steel will coordinate with steel companies to ensure that on the job trainings on maintaining a safe workplace are provided to employees of the steel companies. Small sized units which cannot afford to conduct such trainings on their own will be facilitated by Steel Research and Technology Mission of India (SRTMI) for organizing the same

4.13. Trade

4.13.1. India was a net exporter of steel in 2013-14. However, due to global downturn in steel demand and excess capacities in major steelmaking countries such as China and Japan, India witnessed a significant surge in imports in 2014-15, which continued in 2015-16 as well. Production, consumption, imports and exports of finished steel since 2013-14 are provided in **Annexure V**.

4.13.2. Given the cyclical nature of steel industry, there would be situations of unfair trade practices in the future also. To prevent occurrence of the same, Government will continue to be vigilant and will intervene in the market as and when required with suitable trade remedial measures in line with WTO guidelines and/or India's Foreign Trade Policy to protect the interests of the domestic producers.

4.13.3. Steel industry will be encouraged to be competitive and to develop a global presence, not just in base grades of steel, but also in high quality steel, which are currently produced by selected few international steel companies. Ministry of

Steel will also deliberate with Ministry of Commerce to ensure that export production is zero rated with regard to various central & state taxes and levies.

4.13.4. In addition, certain trade restrictions have been imposed on Indian steel products by other countries. Hence, domestic steel industry will be encouraged to convey their grievances during trade remedial proceedings with those countries.

4.13.5. Considering the importance of information in today's world, the existing institutions such as Joint Plant Committee (JPC) and the Economic Research Unit (ERU) will be further strengthened to meet the requirement of industry and market information related to steel and its raw materials. Continuous strategic research in the steel and related areas, constant tracking of developments in global trade, global investment in the steel industry, emerging technologies in steel & its related areas and data on new mining assets in iron ore, coal, etc. in foreign countries will also be supported. Continuous research on international and domestic steel demand will also be encouraged and risks of investments in foreign countries in steel and related industries will be continuously assessed.

4.14. Financial Risks

4.14.1. Given the enormity of requirement of financial resources to add the required steel capacity and the current conditions of steel industry, mobilizing adequate capital for the industry will be a challenging task in future. Hence, the steel industry will be encouraged to reduce capital costs and remain innovative in developing appropriate structure of the capital to minimize debt and service equity.

4.14.2. Ministry of Steel will also make necessary efforts to identify bad debts in the steel sector. Such companies will be encouraged to lower their Debt/EBITDA ratio by adopting appropriate debt restructuring in consultation with banks as per the RBI guidelines.

4.15. Role of CPSEs and Way Forward

4.15.1. The Companies Act, 2013 was enacted on 29th August 2013 replacing the Companies Act, 1956. In addition, the Ministry of Corporate Affairs has also notified Companies Rules 2014 on Management and Administration (March 2015), Appointment and Qualification of Directors (January 2015), Meeting of Board and its powers (March 2015) and Accounts (October 2014). The Companies Act 2013 together with the Companies Rules provide a robust framework for corporate governance. These statutory provisions are also applicable to CPSEs.

4.15.2. In the current scenario, steelmaking CPSEs need to not only compete with private integrated steel players and cater to the requirements of the MSME steel sector but are also required to be globally competitive. In order to provide economies of scale, CPSEs will be encouraged to increase focus on their core competencies and divest their non-core assets through mergers and restructuring.

4.15.3. As of now, CPSEs have primarily focused and invested more in brown-field expansion of similar steel capacity with limited value addition in terms of high end product development. Ministry will encourage the CPSEs to develop a policy for future investment, so that impetus could be given for development of value added steel capacity and adoption of latest technologies at par with global best practices.

4.15.4. Besides, the CPSEs will also be encouraged to take leadership role in development of steel industry & the community, adopt a more inclusive business model, increase their CSR spends, invest in R&D for indigenous design & engineering and product development for replacement of import. Further, CPSEs will also be encouraged to take lead in promoting steel usage through developing steel intensive structural designs for roads, railways, bridges, crash barriers etc. with proper technical consultations and setting up of service centers for more customized and de-centralized product delivery.

4.15.5. Further to encourage synergy across similar CPSEs, efforts will be made to ensure appointment of independent directors across similar / independent CPSEs.

4.16. Focus on High - End Research: Steel Research & Technology Mission of India (SRTMI)

4.16.1. In India, substantial R&D in Iron and Steel sector is currently being carried out by the leading steel companies like SAIL, Tata Steel, JSW Steel, etc. who have accomplished some significant work in the areas of raw material beneficiation, agglomeration and product development. However, in general, major focus of R&D is limited to day to day operations and hence, lacks disruptive innovation.

4.16.2. India’s R&D investment in steel sector is limited not only in absolute terms but also as percentage of turnover which is 0.05 – 0.5% as against 1% in leading steel companies abroad. The Indian steel companies need to evolve a time bound action plan to enhance their R&D expenditure to at least 1% of the turnover.

4.16.3. Efforts will be made through joint collaborative R&D programmes to create manufacturing capabilities for development of process and products in synergy with natural resources of the country with an aim to minimize damage to the environment.

4.16.4. Ministry of Steel has taken full cognizance of the technological scenario in Indian Steel Industry and has initiated a fresh move for preparation of a comprehensive blue print for promotion of R&D in Iron & steel Sector. To bring in all the stake-holders into one platform and promote steel research on themes of critical and vital national importance, an institutional platform called **"Steel Research and Technology Mission of India"** has been established with an objective to spearhead R&D of national importance in iron & steel, creating state-of-art facilities to conduct cutting-edge research, develop expertise & skill development, manage human resources and bolster a tripartite synergy amongst industry, national R&D laboratories and academic institutes.

4.16.5. In order to boost innovation in the steel sector (future technologies), a time bound action plan will be evolved under the aegis of SRTMI to enhance the R&D expenditure of Indian steel CPSEs. The Ministry through SRTMI will also encourage corporates in steel sector, private and public sector alike, to direct certain sums from their profits towards continuous industry collaborative research. Apart, they would also be encouraged to set up their own steel technology centres and steel sector oriented research and education wings at universities in order to focus on technology based solutions for development of high quality, low cost steel products and to build greater interface between academia, R&D institutions and industry.

4.16.6. Product development is yet another challenge faced by the Indian steel industry which has given rise to import of most of the value added products like automotive steel for high end applications, electrical steel like CRGO & amorphous steel as well as special steel and alloys for the Power Equipment, Aerospace, Defense and Nuclear applications. Production of these value added, front end, and strategic products will be facilitated through acquisition of foreign technology by setting up of joint ventures, or subsidiaries of foreign companies or by indigenous development. Measures will also be taken to ensure development of all such special steel and alloys to minimize import dependence.

4.16.7. Indian steel industry is currently importing technology & critical equipment and systems for steel plants. Hence, necessary efforts will be made under the aegis of SRTMI to raise the level of R&D and acquire best in class manufacturing capabilities to develop all these equipment and systems.

4.16.8. CPSEs will be encouraged to reduce manpower and overhead expenses based on domestic and peer group benchmarking. Besides, the CPSEs will also be encouraged to right size their manpower over time through Superannuation/ Separation/ intakes in conformance with technological advances and suitably exercise the option of Voluntary Retirement Scheme (VRS) to improve labour productivity.

4.16.9. As a part of skill development initiative, the Ministry will coordinate with the technical institutes under its aegis and INSDAG to re-align the education system to attract, facilitate and generate steel domain experts.

5. Power to amend the Policy

5.1. Notwithstanding anything contained in the foregoing paras, the Ministry of Steel, with the approval of Competent Authority, may amend various aspects of this Policy from time to time depending upon the experience gained during implementation, market dynamics, end user interest etc.

Annexure I: Forecast of iron and steel demand and production by 2030-31

(All values in MT unless stated)

Sr. No.	Parameters	Projections (2030 – 31)
1	Total crude steel capacity	300
2	Total crude steel demand/production	255
3	Total finished steel demand/production	230
6	Sponge iron demand/production[3]	80
7	Pig iron demand/ production	17
8	Per Capita Finished Steel Consumption in Kgs	158

Source: Ministry of Steel, INSDAG, MECON

Projections of Pig Iron & Sponge Iron represent the mean value based on the premise that 60-65 % of steel production in 2030-31 shall be coming through BF-BOF route and rest through EAF/IF route.

Assumptions:

i. GDP growth rate assumed at 7.5%[4] y-o-y

ii. Elasticity of steel demand with GDP = 0.8 till FY 20 and 1.0 from FY 20 onwards

iii. Steelmaking capacity to reach 300 MT by 2030-31

[3] DRI made through coal based route : 70% {Balance through gas based route}
[4] Average GDP growth rate of India was 7.5% during 2010 – 2015 (World Bank)

Annexure II: Sector wise steel consumption in India in MT (unless stated)

Sr. No.	Item	Current demand 2015-16	Projected demand in 2030-31
1	**Construction & Infrastructure** (Projects - Steel, Oil, Highways, Bridges, Airports, Ports, Urban Infrastructure, Water Transportation, Pre-fabricated Buildings, Power Projects including Transmission, Oil & Gas Pipelines Real Estate – Residential & Industrial)	50.5	138
2	**Engineering & Fabrication** (Capital Goods, Consumer Durable, Electrical Goods, General Engineering, Tube Making, Cold Reducing, Wire Drawings, Industrial Bodies & Pressure Vessels, General Fabrication, Defence Equipment)	18	50
3	**Automotive**	8.2	28
4	**Other Transport** (Rail lines, Wagons Coaches, Ship Building, Coastal)	2.4	8
5	**Packaging & Others** (not included above) (Petroleum, non-petroleum, LPG Gas Cylinders)	2.4	6
Total Finished Steel Consumption in MT		**81.5**	**230**
Per Capita Finished Steel Consumption in Kgs		**61**	**158**

Source: Ministry of Steel, MECON

Annexure III: Forecast of major raw material requirement by 2030-31 (All Values in MT unless stated)

Sl. No.	Raw materials	Projections (2030-31)
1	Iron ore requirement	437
2	Coking coal requirement	161
3	Non-coking coal requirement for PCI	31
4	Non-coking coal requirement for DRI	105
5	Natural Gas (in MMSCMD[5])	20
6	Manganese ore requirement	11
7	Chromite ore requirement	5
8	Limestone & Dolomite requirement	86
9	Ferro-alloys	4
10	Refractories	3
11	Scrap	16

Source: Ministry of Steel, MECON

Projections represent the mean value based on the premise that 60-65 % of steel production in 2030-31 shall be coming through BF-BOF route and rest through EAF/IF route.

Assumptions:

BF-BOF route: 60-65%; EAF/IF route: 35-40% (2030-31)
% Scrap in Charge mix of BOF : 15
DR-EAF charge mix considered : 63% DRI, 35% Hot Metal & 2 % Scrap
DR-IF charge mix considered : 80% DRI & 20% Scrap
Charge mix in BF considered : 60% Sinter, 25% Pellet & 15% Lump ore
Charge mix in gas based DR plant considered : 30% Lump ore & 70% Pellet
Charge mix in Coal based DR plant [50% kilns running on pellet & 50% on lump ore]
DRI made through coal based route : 70% {Balance through gas based route}
Skip Coke required in BF : 450 kg/thm
Avg. PCI Injection in BF considered : 150 kg/thm
Iron Ore required /t of Hot metal in BF : 1.65 t
Iron ore required /t of solid charge in DR plant : 1.55 t
Natural gas required /t of DRI production : 280 SM^3

[5] Million Metric Standard Cubic Meter Per Day
(Assumed that 100 % DRI through gas based route would be produced using natural gas. In case DRI is produced using other gases such as syngas, coke oven gas, Corex gas, etc., the natural gas demand shall accordingly reduce)

Annexure IV: Targets for techno-economic performance

Parameter	Units	International Best Practices	Current Value	Target for 2030-31
Coke Rate	Kg/thm	275 - 350	400 - 600	300 – 350
CDI Rate	Kg/thm	200 – 225	50 – 200	180 - 200
BF Productivity	tonnes/m^3/day	2.5 – 3.5	1.3 – 2.2	2.5 – 3.0
Specific Energy Consumption	Gcal/tcs	4.5 – 5.0	6.2 – 6.7	5.0 – 5.5

Source: Ministry of Steel

Annexure V: Production, consumption, imports and exports of finished steel (in MT)

Period	Production for sale	Import	Export	Consumption
Apr 2016 – Jan 2017	82.9	6.1	5.9	68.9
2015-16	91	11.7	4.1	81.5
2014-15	91.5	9.3	5.6	77
2013-14	87.7	5.5	6	74

Source: Ministry of Steel, JPC

Annexure VI: Indian Steel sector – Industry Analysis

Suppliers' power

+ Iron ore- dependent on NMDC, OMC and Odisha miners
+ Coking coal/ Natural Gas- dependent on imports
+ Thermal Coal- CIL/ SCCL
+ Natural Gas- Government allocation, R-LNG contracts
+ Huge dependency on major suppliers
+ High switching cost for steelmakers
+ Very few steelmakers have captive mines and are not dependent on the vagaries of the market
+ High cost of raw material relative to total purchases in industry
— Fragmented coke suppliers
— Low threat of forward integration by major suppliers

Threat of new entrants

+ 100% FDI in Steel sector
+ Government facilitating investment
+ Very few players have economies of scale
+ Easier access to key inputs (Auction)
+ Low brand identity (commodity) and low switching cost
+ Fewer proprietary products and low chances of retaliation
— High capital costs and entry barriers
— High psychological costs for switching suppliers
— Raw material security & high logistics cost issues
— Steel sector recognised as stressed by the banks
— Time consuming land and environmental approvals
— Highly capital & technology intensive industry

Industry rivalry

+ Industry is divided among few integrated steel manufacturers and fragmented MSME steel players
+ Competition among domestic producers
+ Competition from foreign players, esp. China
+ Disinvestment & capacity expansions by CPSEs

Threat of substitutes

+ Limited substitutes- Aluminium, plastic and carbon fibre
— High switching cost and high performance tradeoff of substitutes
— Low buyer inclination to substitute

Buyers' power

+ Increasing demand at 5-6% CAGR
+ E-Platform – MSTC Metal Mundi launched to facilitate transparent sale of finished & semi-finished steel products
+ Steel used in automobile & engineering goods market are dominated by private players
— Unregulated sector, but Govt. may take trade remedial measures that indirectly influences the domestic retail prices
— Steel used in construction & Infra sector mainly procured by Govt. entities
— Fragmented MSME steel players

Appendix I: List of Abbreviations

BF-BOF	Blast Furnace – Blast Oxygen Furnace
CAGR	Compounded Annual Growth Rate
CDI	Coal Dust Injection
CDR	Corporate Debt Restructuring
CIL	Coal India Limited
CIS	Commonwealth of Independent States
COP	Conference of the Parties
CPSE	Central Public Sector Enterprises
CRZ	Coastal Regulation Zone
CRGO	Cold Rolled Grain Oriented
DPE	Department of Public Enterprises
DRI	Direct Reduced Iron
EAF	Electric Arc Furnace
EBT	Eccentric Bottom Tap
FDI	Foreign Direct Investment
FTA	Free Trade Agreement
GDP	Gross Domestic Product
GST	Goods and Services Tax
IF	Induction Furnace
INDC	Intended Nationally Determined Contribution
MMSCMD	Million Metric Standard Cubic Meter Per Day
MoPNG	Ministry of Petroleum & Natural Gas
MoS	Ministry of Steel
MTPA	Million Tonnes Per Annum
NMDC	National Mineral Development Corporation
NPA	Non-Performing Assets
PCI	Pulverized Coal Injection
PPP	Public Private Partnership
R&D	Research and Development
REC	Renewable Energy Certificates
R-LNG	Regasified Liquefied Natural Gas
UHP	Ultra High Power
UNDP	United Nations Development Programme
VAT	Value Added Tax
WTO	World Trade Organization

AM/NS INDIA

AMNS/2023/PP/Expansion
20th January 2023

Shri A K Padhy
Executive Director – Commercial
NMDC HQ, Castle Hills,
Masab Tank,
Hyderabad 500028, Telangana

Subject: Iron Ore Fines securitization for capacity expansion of Pellet Plant at Vizag.

Reference: Our discussions at NMDC HQ dated 13th January 2023

Dear Mr Padhy,

As You are aware, we are expanding capacity at our Hazira ISP from existing 7.2 MTPA to 15.0 MTPA with a Capex commitment of INR 60,000 Crores, in support to Make in India initiative and in tune with 2017 National Steel Policy ambitious target of achieving 300 MT capacity by 2030. The plant expansion enhances our contribution towards the nation's steel growth plan that not only spurs the Atma Nirbhar Bharat initiative but also envisions India as a global manufacturing hub. With the state-of-the-art facilities, the project will equip us to produce high grade value added steel solutions, aligning with the Government's import substitution policy goals.

To support iron making volumes at Hazira we are also intending to invest in and additional pellet plant of 3.3 MTPA capacity at our asset in Vizag with Capex of INR 1,200 Crores. Our current installation of 7.2 MTPA at Vizag is supported by sourcing of Iron Ore Fines from NMDC projects in Chhattisgarh by pumping in slurry form through 267 Kms cross country pipeline making using of cleanest and efficient mode of transportation. We are inclined to source an additional requirement of 3.0 MTPA Iron Ore Fines from NMDC to support capacity expansion. Expansion will come on stream by second quarter of CY 2026.

Further our decision making on location of expansion is though dependent on confidence from NMDC to support additional volume of 3.0 MTPA via rakes from Chhattisgarh of a quality defined in current LTA.

Request a letter comfort from NMDC on securitization of this additional requirement for our proposed Pellet plant expansion at Vizag.

Thanking You,

Deepak Sindkar
V.P & Head Bulk Raw Materials

C.C: **C.M.D - N.M.D.C**

ArcelorMittal Nippon Steel India Limited
(Formerly Essar Steel India Limited)
Registered Office : 27th km, Surat-Hazira Road,
Hazira, Surat 394 270 Gujarat, India
CIN U27100GJ1976FLC013787

T +91 261 668 9200
E contact@amns.in
W www.amns.in

A joint venture between ArcelorMittal and Nippon Steel Corporation

ArcelorMittal NIPPON STEEL

Steel Exchange India Limited

Regd. Office : D.No:1-65/K/60, Plot No:60, Abhis Hiranya, 1ST Floor, Kavuri Hills, Hyderabad- 81, TS.
Phone: +91-40-23403725, 23413267, 40033501
Corp. Office : Block-A, Green City Towers, Green City, Vadlapudi , Visakhapatnam-530049, A.P
Phone: +91-891-2587175, 2749215, **www.seil.co.in**, **E-mail :** info@seil.co.in
GSTIN : 36AABCP9362L1ZX & 37AABCP9362L1ZV **CIN :** L74100TG1999PLC031191

ED (Comml & MM)
D.M (Comml)

Date: 10.01.2024

To
Director - Commercial,
NMDC HQ, Masab Tank,
Hyderabad-500028

GM (Com) I

Sub: **Iron Ore Supply Securitization for Capacity Expansion of our Integrated Steel Plant in Vizianagaram District, Andhra Pradesh**
Ref: **Our discussions at the NMDC HQ**

Dear Sir,

As you're aware, we are undertaking a capacity expansion at our ISP in Vizianagaram, Andhra Pradesh from the existing capacity of 0.35 MTPA to 1.5 MTPA via the Pellet/DRI route with a CAPEX commitment of ₹ 2,000 crores. This plant expansion will equip us to increase the production capacity of our existing products as well as to introduce high grade value added special steel products. This is in line with the Government's Make in India initiative and also supports the push for an Atma Nirbhar Bharat.

Our current setup is supported by sourcing of Iron Ore Lumps from NMDC Bailadila Mines by way of Railway Rake at our own Private Railway Siding. We are inclined to source all the post expansion requirement of Iron Ore Fines and Lumps totalling to about 2.5 MTPA from NMDC. The expansion is expected to come online by the end of CY 2026.

Further, the workings to aid in the decision making for the expansion are reliant on NMDC's confidence in being able to support our post expansion requirement of 2.5 MTPA of Iron Ore Fines and Lumpsby the end of CY 2026.

With this, we request you to please issue a letter of comfort from NMDC to SEIL on securitization of Iron Ore Supply for the expansion of our ISP in Vizianagaram District, Andhra Pradesh.

Thanking you.

For Steel Exchange India Limited.,

Steel Exchange India Limited Hyderabad

Com/3399
22/1/24

N. Srinivas
Authorised Signatory

Copy to: 1. CMD, NMDC 2. ED-Commercial, NMDC

IDC
9/1/24

एनएमडीसी हैद./NMDC HYD.
11 JAN 2024
सचि./Cmp. Sectt.

WORKS
Integrated Steel Plant : Sreerampuram, L.Kota Mandal, Vizianagaram District-535161. Phone : +91 - 8966-267218, 267111
Power Plant & SMS : Opp. Mandapalli New Bridge, Kothapeta, East Godavari District-533223.

To

Executive Director (Commercial)

NMDC Ltd.

Hyderabad

Date: 7th February 2024

Subject: Request for Long-Term Supply of 1.2 Million Tonnes per annum of Iron Ore Fines for Our Upcoming 0.9 Lakh tonnes annual capacity Pelletisation Plant at Vizianagaram, (AP)

Respected Sir

We introduce ourselves as Maa Mahamaya Industries Limited (MMIL), a mini integrated steel plant, major customer of NMDC Limited that was incorporated in the year 2003 by Mr Ashok Kumar Agrawal at RG Peta Village, Vizianagaram (Andhra Pradesh). The company is engaged in production of TMT bars under the brand name of **Mangal TMT, MS Billets, Sponge Iron with captive power plant.** MMIL is situated in the backward district of Andhra Pradesh and is situated on the Kothavalsa – Kirandul Line (KK Rail Line) which makes it favourable for both MMIL and NMDC for a mutual agreement for supply of Iron ore fines.

Firstly we would like to thank NMDC for letting us be part of their valued organisation and would like to express our continued interest and commitment to sustaining our partnership with NMDC. Since our inception we are totally dependent on NMDC Ltd. for supply of Iron Ore on consistent basis. MMIL is in process to install 9,00,000 MT per annum Iron Ore Pelletization Plant in its existing location and looking for the opportunities ahead.

Our projected annual requirement for iron ore fines stands at an estimated quantity of **12 Lakh Metric Tonnes**per annum (or 1 lakh metric tonne per month) to facilitate the smooth functioning of our pellet plant operations. Understanding the criticality of this raw material security in our production process, we are seeking a long-term commitment from NMDC for

Regd. Office : Industrial Ward, Dhamtari, Chhattisgarh - 493 773
Office & Works : R.G.Peta - Village, L.Kota - Mandal,
Vizianagaram - District - 535 161, A.P.
Tele Fax : 08966 267361
e-mail : info@maamahamaya.com; marketing@maamahamaya.com

the supply of iron ore fines.Currently we are supporting over 1000 direct and indirect employment and the further expansion will lead to an additional 500 direct and indirect employment. We are paying revenue direct and indirect taxes to the Government of India to the tune of 60 cr in existing capacity and estimated to above 100 cr post expansion.

The existing relationship between our organizations has been invaluable, and we have consistently appreciated NMDC's commitment to quality, reliability, and professionalism in meeting our raw material needs. This has significantly contributed to our operational efficiency and success.

In view of the imminent commissioning of our new pellet plant, we kindly request NMDC's support in establishing a long-term linkage for the supply of iron ore fines. A committed supply arrangement would not only ensure the seamless operation of our plant but also solidify the foundation for a mutually beneficial long-term partnership between our entities. In this regard a commitment letter of comfort is requested from NMDC for supply of 1.2 Million T of iron ore fines to our ongoing pellet plant at Vizianagaram Dist (A.P.)

We eagerly anticipate a positive response with letter of commitment for supply of Fines and the opportunity to further strengthen our collaboration as well as partnership for supply of Fines in line with expansion plan of NMDC. Please feel free to contact us at +919052371111 or ashok@maamahamaya.com for any query at your convenience.

Thank you and waiting for reply in this matter.

Yours Faithfully
Best Regards

Chairman & Managing Director
Maa Mahamaya Industries Limited

Requirement of Iron ore for FY-25

Gautam Chatterjee <gautam.chatterjee@jindalsteel.com>

Tue 26-Mar-24 12:01 PM

To:Prasad KVVSSRKV <kvvssrkvprasad@nmdc.co.in>;

Cc:ABANINDRA KUMAR PADHY <akpadhy@nmdc.co.in>; Ashish Pandey (Project) <ashish.pandey@jindalsteel.com>; Nikher Jaipuriar/Kasia <nikher.jaipuriar@jindalsteel.com>; Swaran Kumar(IOMG) <swaran.kumar@jindalsteel.com>;

Dear Mr Prasad,
Please find below the annual requirement of Fines & DRCLO for JSP & JSO.

LTL REQUIREMENT FOR FY-25

PLANT	MATERIAL	MONTHLY	ANNUALLY
		QTY (IN MT)	QTY (IN MT)
JSP ANGUL	FINES	1,20,000	14,40,000
JSP RAIGARH	FINES	1,20,000	14,40,000
JSO ANGUL	FINES	3,60,000	43,20,000
TOTAL FINES	**FINES**	**6,00,000**	**72,00,000**
JSP ANGUL	DRCLO	1,20,000	14,40,000
JSP RAIGARH	DRCLO	3,00,000	36,00,000
TOTAL DRCLO	**DRCLO**	**4,20,000**	**50,40,000**
GRAND TOTAL	**FINES+DRCLO**	**10,20,000**	**1,22,40,000**

Further it is requested to arrange for signing of LTL as it is going to expire on 31st March.

Thanks & Regards
Gautam Chatterjee
Head Planning & Sourcing- Iron Ore

Jindal Steel & Power Limited
PB No 86, Joda-Barbil Highway
District Keonjhar - 758035
Odisha
M- +91 9771487362
+91 8986602905
E- gautam.chatterjee@jindalsteel.com
Follow us on Facebook | Twitter | Youtube
www.jindalsteelpower.com

This Mail is Quarantined by Barracuda ,Open with Caution
Confirmation on FY 25 volumes

Mohit Ratolikar <mohit.ratolikar@jsw.in>

Thu 18-Jan-24 9:19 AM

To:ABANINDRA KUMAR PADHY <akpadhy@nmdc.co.in>;

Cc:Director Commercial <dc@nmdc.co.in>; Puneet Jagatramka <puneet.jagatramka@jsw.in>; Shashikant Sharma <shashikant.sharma@jsw.in>; Ravi Jain <jain.ravi@jsw.in>; Prasad KVVSSRKV <kvvssrkvprasad@nmdc.co.in>; Venkateswarlu B <bvenkat@nmdc.co.in>;

Importance: Low

Dear Sir

We are in the process of preparing an Annual Business plan for FY 25. NMDC supplies have been crucial for us to achieve the committed volumes.
As you know, as a LTA customer, we had requisitioned 11 MN Mt requirement to NMDC Bailadila for FY 24.
This year till Dec-23, NMDC has shipped 4.45 Mn Mt which is almost at par with the previous year.
For Fy 25, we are projecting a requirement of 11 Mn Mt for the Dolvi plant from NMDC Bailadila.
We request your confirmation on the above so that we can firm up the business plant.

Regards
Mohit Ratolikar

राष्ट्रीय इस्पात निगम लिमिटेड
(भारत सरकार का उपक्रम)

Rashtriya Ispat Nigam Limited
(A Government of India Undertaking)
CIN : U27109AP1982GOI003404

Ref: Pur 24.66. IO/NMDC/LTA/ 24/Pur/212

Dt: 06.02.2024

ED (Commercial)
M/s. NMDC Limited, Khanij Bhavan,
10.3.311/A, Castle Hills, Masab Tank,
Hyderabad – 500 028.

K/A : Shri A.K. Padhy

Dear Sir,

Sub: Supply of Iron Ore products on LTA with RINL from Bailadilla sector for FY 2024-25-Reg.
Ref: Long Term Agreement with RINL dated 08.09.2022.

*****

We invite your attention to the LTA dated: 08-Sep-2022 entered between RINL and NMDC for supply of Iron Ore Products from Bailadilla sector.

We are herewith indicating the tentative product wise requirement of Iron Ore Products of RINL for the year **2024-2025** as below:

Iron Ore Products	Tentative Quantity for FY 2024-25 in (Qty in Lakh Tons)
Iron Ore Fines	33.03
Iron Ore Slime	20.96
Iron Ore Lumps	48.30
Calibrated Lump Ore	1.55
Total	**103.84**

The above quantities are tentative based on our current production assessments. However, we will intimate our monthly requirements from time to time and NMDC is requested to kindly ensure dispatches of Iron Ore products as per the monthly plans intimated.

Please acknowledge the receipt of his letter.

Thanking you,

Yours faithfully
For Rashtriya Ispat Nigam Limited
Visakhapatnam Steel plant

(G Appa Rao)
General Manager (MM)

हिन्दी के प्रयोग का स्वागत है, पत्र का उत्तर शीघ्र दिया जायेगा।

Please send your reply to :
Web Site : www.vizagsteel.com
विशाखपट्टणम इस्पात संयंत्र, विशाखपट्टणम – 530 031 E-mail :
Visakhapatnam Steel Plant, Visakhapatnam - 530 031 Cell No. :

Regd. Office : Rashtriya Ispat Nigam Limited (A Government of India Undertaking)
Visakhapatnam Steel Plant, Administrative Building, Visakhapatnam - 530 031, INDIA.
पंजीकृत कार्यालय : राष्ट्रीय इस्पात निगम लिमिटेड, (भारत सरकार का उपक्रम)
विशाखपट्टणम इस्पात परियोजना, प्रशासनिक भवन, विशाखपट्टणम - 530 031, भारत

RE: Request for Iron Ore requirement - reg.

Manikandan Loganathan <Manikandan_Loganathan@welspun.com>

Tue 05-Mar-24 10:45 AM

To:HO Commercial <hocommercial@nmdc.co.in>;

Cc:Prasad Lakkimsetti <prasadlks@nmdc.co.in>; ABANINDRA KUMAR PADHY <akpadhy@nmdc.co.in>; Prasad KVVSSRKV <kvvssrkvprasad@nmdc.co.in>; M V Subbarao <MV_Subbarao@welspun.com>; Aman Goenka <aman_goenka@welspun.com>; Chirag Bhanderi <Chirag_Bhanderi@welspun.com>; Diksha Gupta <Diksha_Gupta@welspun.com>;

Dear Sir,

This is with reference to the trail email, we are pleased to provide our Iron ore requirement for the period 2024 to 2027.

In Metric Tonnes

Mine	Material	Fe	FY 25	FY 26	FY 27*
Bacheli	Iron Ore Fines	64	7,35,000	7,35,000	14,70,000
Kirandul	Lumps 10-40	65	1,40,000	1,40,000	2,80,000
Bacheli	DRCLO 10-40	67	2,80,000	2,80,000	2,80,000
Total			**11,55,000**	**11,55,000**	**20,30,000**

** FY 27 requirement capturing our future expansion plans.*

Request to kindly ensure specifications as per our previous year Long term agreement and also we would like to keep option for ROM as a provision in our contract which will be communicated to you on time to time for lifting.

Request to kindly confirm receipt of tis email and send us the contract copy for execution.

Regards,
Manikandan L
Associate General Manager, Bulk Raw material Procurement

Welspun DI Pipe Limited
Welspun House, 5th Floor, Kamala City, Senapati Bapat Marg, Lower Parel (W), Mumbai 400 013, India
Mob: +91 8608079409 | Tel: +91 22 6613 6185
http://www.welspuncorp.com

From: HO Commercial [mailto:hocommercial@nmdc.co.in]
Sent: 17 February 2024 15:07
To: Manikandan Loganathan <Manikandan_Loganathan@welspun.com>; Prakash Tatia <prakash_tatia@welspun.com>; tatia.prakash@gmail.com
Cc: Prasad Lakkimsetti <prasadlks@nmdc.co.in>
Subject: Request for Iron Ore requirement - reg.

Dear Sir/Madam,

In connection with entering long term agreements for the supply of iron ore from NMDC for the period 2024-27, it is requested to kindly furnish your iron ore requirement (Product wise) for the next 3 financial years and also indicate the mine (Bacheli/Kirandul/DIOM) and sector (Bailadila/Donimalai) to enable us to process the Long term agreements for the above period.

Thanks & Regards,
HO Commercial
NMDC Limited

MSP STEEL & POWER LIMITED
Corporate Office: 16/S, Block-A, New Alipore, Kolkata-700 053, **Phone:** 033 4005 7777
Fax: 033 2398 2239 | **E-mail:** contactus@mspsteel.com | **Website:** www.mspsteel.com

Dt. 21.03.2023

To
The Executive Director (Commercial)
M/s. NMDC LIMITED
Khanji Bhavan,
10-3-311/A, Castle Hills, Masab Tank,
HYDERABAD- 500 028.
Ph. No. : (040) 2353 8760 / 61
Fax No. : (040) 2353 8769
E-mail : hocommercial@nmdc.co.in, hois@nmdc.co.in

Kind Attention : Mr. A.K. Padhy , Executive Director (Commercial)

Sub: Allotment of Iron for 3 years 2024-27 from (Bacheli/Kirandul/DIOM) of Bailadila /DonimalaiSector

Dear Sir,

We have a steel manufacture unit in Jamgaon, Dist – Raigarh, Chattisgarh. We are interested to purchase DRCLO & Baila Fines from your organization for the financial year 2024-27 (01-04-2024 to 31.03.2028) as per the following format

Products	Requirment FY 2024 - 25	Requirment FY 2025 - 26	Requirment FY 2026 - 27
Baila Lumps (Fe 65.5%, 6-40mm)	-		
Baila ROM (Fe 65.5%, 10-150mm)	-		
DRCLO (Fe 67%, 10-40mm)	1,20,000 MT	1,20,000 MT	1,20,000 MT
Sized lump ore (Fe 65.5%, 10-20mm) Bacheli	-		
Sized lump ore (Fe 65.5%, 10-20mm) Kirandul	-		
Baila Fines (Fe 64%, - 10mm)	3,00,000 MT	5,00,000 MT	5,00,000 MT

Kindly acknowledge the receipt of this letter and allot us the same.

Thanking you

Yours faithfully,

For **MSP Steel & Power Ltd**

Sanjoy Sekhar Das

Authorized signatory

MSP STEEL & POWER LTD. KOLKATA

Industrial Growth Center, Siltara
Raipur (CG) 493111, India
Tel: +91 771 2216100
Fax : +91 771 2216198/99
PAN No.: AAACR6149L
CIN : L27100MH1973PLC 016617
www.seml.co.in
info@seml.co.in

An ISO 9001, ISO 14001 & ISO 45001 Certified Company

SARDA ENERGY & MINERALS LTD.

Ref : SEML/NMDC-HYD/2023-24/ **Date : 20.02.2024**

To,
The Executive Director (Commercial),
National Mineral Development Corp. Ltd.
Khanij Bhawan, 10-3-311/A,
Castle Hills, Masab Tank,
Hyderabad - 500 028

Sub : Requirement of Iron Ore Lump/Fines from Bailadiala Sector for the period 2024-27.

Ref : Your Office e-mail dated 17.02.2024

Dear Sir,

We are providing herewith the requirement of Iron Ore Products (Lump & Fines) from Bailadila Sector for the period 2024 -27 are as under:

Products	Requirement (Unit– MT)		
	FY 2024-25	FY 2025-26	FY 2026-27
DR CLO (Fe 67%, 10-40mm)	7,00,000	7,00,000	7,00,000
KMEZ Sized Lump (Fe 65.5%, 10-20mm)			
KMEZ Fines (Fe 64%, -10mm)	9,00,000	9,00,000	9,00,000
Baila Fines (Fe 64%, -10mm)			

We request you to kindly invite us for signing of long-term Agreement for lifting of above material for the period 2024-27.

Thanking You,

Yours Faithfully,
For, **Sarda Energy & Minerals Ltd.**

SARDA ENERGY & MINERALS LTD. Raipur

H. Gurubasavaraja
Head (Raw Material –Steel)

Vandana Global

Leading the New

Ref: VGL/NMDC/I-Ore /2024-25/01

Date: 19.02.2024

ED (Commercial)
M/s NMDC Limited
KhanijBhavan, 10-3-322/A,
Castle Hills, Masab Tank
HYDERABAD – 500 028.
Fax No.040-23538789

DGM (Commercial)
M/s NMDC Limited
KhanijBhavan, 10-3-322/A,
Castle Hills, Masab Tank
HYDERABAD – 500 028.
Fax No.040-23538789

Subject: Request for Allotment Iron Ore Lump from Bailadila Sector by Rail & Road in The Financial Year 2024-2025, 2025-2026 and 2026-2027 respectively.

Dear Sir,

At a very outset, we are very much thankful to your courtesy extended to us all the time regarding the Supply of Iron ore from your Bailadila Project and also will be getting the same in future.

Considering the above, we request your good self to kindly favour us by sanctioning the following quantity of Iron Ore at the earliest which will be a great help to us to build up sufficient stock to run the plant for the production of Sponge iron 850 MT per Day x Consumption of Iron ore @ 1.8 MT.

(1)Period from 2024-2025

Particulars	Quantity in MT for 2024-2025
DRCLO(Fe 67%, 10-40mm) by Rake	4,41,600 MT(96 Rakes Per Annum)
Baila ROM (Fe 65.5%, 10-150mm) by Rake	55,200 MT (12 Rakes Per Annum)
Baila ROM (Fe 65.5%, 10-150mm) by Road	12,000 MT Per Annum
Sized Lump Ore(Fe 65.5%, 10-20mm) Bacheli by Road	49,650 MT Per Annum
Sized Lump Ore(Fe 65.5%, 10-20mm) Kirandul by Road	Nil

Total = 5, 58,450 MT Per Annum

(2)Period from 2025-2026,

Particulars	Quantity in MT for 2025-2026
DRCLO(Fe 67%, 10-40mm) by Rake	4,41,600 MT(96 Rakes Per Annum)
Baila ROM (Fe 65.5%, 10-150mm) by Rake	55,200 MT (12 Rakes Per Annum)
Baila ROM (Fe 65.5%, 10-150mm) by Road	12,000 MT Per Annum
Sized Lump Ore(Fe 65.5%, 10-20mm) Bacheli by Road	49,650 MT Per Annum
Sized Lump Ore(Fe 65.5%, 10-20mm) Kirandul by Road	Nil

Total = 5, 58,450 MT Per Annum

VANDANA GLOBAL LIMITED RAIPUR (C.G.)

www.feroton.com

(Registered Office
Flat No. 602, Poonams Apartment, N.S. Road No. 11, Plot No. 23
V.P.D. Scheme, Juhu Vile Parle (West), Mumbai - 400 049
E : mumbai@vandanaglobal.com

www.tmtnext.com

( ) Works
Phase-II, Siltara Industrial Area, Siltara, Raipur - 493 111, Chhattisgarh, India
T: +91 0771 4235555 E: works@vandanaglobal.com

Vandana Global
Leading the New

(3)Period from 2026 - 2027

Particulars	Quantity in MT for 2026-2027
DRCLO(Fe 67%, 10-40mm) by Rake	4,41,600 MT(96 Rakes Per Annum)
Baila ROM (Fe 65.5%, 10-150mm) by Rake	55,200 MT (12 Rakes Per Annum)
Baila ROM (Fe 65.5%, 10-150mm) by Road	12,000 MT Per Annum
Sized Lump Ore(Fe 65.5%, 10-20mm) Bacheli by Road	49,650 MT Per Annum
Sized Lump Ore(Fe 65.5%, 10-20mm) Kirandul by Road	Nil

Total = 5, 58,450 MT Per Annum

Total = 16,75,350 MT for 3 Years

We do hope and believe that this will be sanctioned within considerable time so that we could not face the problem due to scarcity of iron ore resulting hampered production.

Your immediate action and co-operation in this matter will be highly solicited.

Thanking you,

Yours faithfully,
For, **VANDANA GLOBAL LIMITED**

Sanjay Kumar Gupta
Vice President (Raw Materials)
Mobile No : 91091-63248

VANDANA GLOBAL LIMITED RAIPUR (C.G.)

www.feroton.com
( ) Registered Office
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J.V.P.D. Scheme, Juhu Vile Parle (West), Mumbai - 400 049
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T: +91 0771 4235555 E: works@vandanaglobal.com
www.tmtnext.com
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Vandana Global Limited (CIN U51101MH1996PLC219948)
www.vandanaglobal.com
ISO 50001 : 2018, ISO 14001 : 2015, ISO 45001 : 2018, ISO 9001 : 2015, IMS CERTIFIED COMPANY
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SAL STEEL LTD.
Corp. Office : Shah Alloys Corporate House, Sola - Kalol Road, Santej, Ta. Kalol, Dist. Gandhinagar- 382721
Regd. Office : 5/1, Shreeji House, 5th Floor, Behind M.J.Library, Ashram Road, Ahmedabad- 6. India
Phone : 02764 - 661100

0026
Cert No. 5892-QIS, EIS, OHS - 001
ISO 9001, ISO 14001, ISO 45001

Dtd.: 17.02.2024

To

The Executive Director (comml)

NMDC , Masab Tank

Hyderabad

Sub: Requirement of iron ore for the period 2024-2027

Respected sir

With reference to the subject matter and processing of our long term contract for the period 2024-2027 , we hereby submit our requirement for the period of three years as follows:-

Material	Mines	Qty
DRCLO	Bacheli	4.5 LMT
Iron ore fines	Bacheli	10.00 LMT

We shall be highly grateful for the allocation of the aforesaid material and quantity .

Thanking you

For S.A.L Steel Limited

Rakesh Ranjan

(V.P.-SCM)

S.A.L. STEEL LTD.

REAL®
ISPAT & POWER LTD.

GK TMT
सपनों को जीके देखो

March 05, 2024

To,
The HOD (Commercial)
Khanij Bhavan 10-3-311/A,
Castle Hills, Masab Tank,
Hyderabad-500028

Subject: Regarding requirement of Iron Ore for LTA 2024-27

Dear Sir/Madam,

In connection with entering long term agreement for the supply of iron ore from NMDC for the period 2024-27, ore requirement (Product wise) for the next 3 financial years are as below:

Product	Requirement (MTPA) 2024-25	Requirement (MTPA) 2025-26	Requirement (MTPA) 2026-27
Baila Lump (Fe: 65.5%, 10-40MM)	0	0	0
Baila ROM (Fe: 65.5%, 10-150MM) - Kirandul	0	0	0
Baila ROM (Fe: 65.5%, 10-150MM) - Bacheli	0	0	0
DRCLO (Fe: 67%, 10-40 MM)	**1,08,000**	**1,08,000**	**1,08,000**
Baila Sized Lump (Fe: 65.5%, 10-20MM)	**6,000**	**6,000**	**6,000**
Baila Fines (Fe: 64%, -10 MM)	0	0	0
KMEZ Sized Lump (Fe: 65.5%, 10-20MM)	**6,000**	**6,000**	**6,000**
KMEZ Fines (Fe: 64%, -10 MM)	0	0	0
Total	**1,20,000**	**1,20,000**	**1,20,000**

Kindly process and do the needful. We look forward to building a long-lasting relationship with you as earlier.

Thank you for your time and attention.

For, **Real Ispat and Power Ltd.**

Authorized Signatory

Annexure_1.4

No. 4/2/2018-M.VI
Government of India
Ministry of Mines
*****

Shastri Bhawan, New Delhi
Dated the 13th April, 2024

To

The Chairman-Cum-Managing Director,
National Mineral Development Cooperation (NMDC),
NMDC Ltd., Khanij Bhavan, Castle Hills,
Masab Tank, Hyderabad - 500 028.
Email ID: cmd@nmdc.co.in

Subject: Block reserved in favour of NCL (NMDC-CMDC) for an area upto 646.596 Ha. for Mineral Iron Ore - regarding.

Sir,

I am directed to Inform you that this Ministry, vide Notification No. G.S.R. 697 (E) dated 30.09.2019, reserved an area of 646.596 hectares in Bailadila reserve Forest, Deposit No. 4, District South Bastar, Chhattisgarh for mineral iron ore for undertaking prospecting or mining operations through a joint venture, namely, M/s NMDC Limited – CMDC Limited (NCL).

2. In this regard, NMDC is requested to obtain all clearances in time and execute the ML as per the time lines.

3. This issues with the approval of competent authority.

Yours faithfully,

Signed by Vinod Kumar
Date: 13-04-2024 11:36:22

(Vinod Kumar)
Under Secretary to the Govt. of India
Tel. No.: 011- 23383946
Email: vinod.kr71@nic.in