Presenting on:
An Efficient step towards Steel Solution

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WELCOME !!

Distinguished Delegates

Date: 6th September 2019

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Business Unit Head- (CRGO) – Mahindra Accelo
Contents:

- About Mahindra Group
- Our Presence in Indian CRGO Sector
- Our strategic initiatives.
Mahindra and Mahindra Limited (M&M) started in year 1945, an Indian multinational, automobile manufacturing corporation headquartered in Mumbai.

- US 20.7 billion dollar turnover in F’18.
- Ranked as the 10th most trusted brand in India, by The Brand Trust Report
- Ranked 21st in the list of top companies of India in Fortune India 500 in 2011
- The World’s Largest Tractor Company
- Market leader with 38% Indian share in SUV / Pickup segment.
- Tech Mahindra, one of India’s Leading Software Service Exporters
Mahindra & Mahindra – an Indian multinational

...across 6 continents and 100+ countries...
Different sectors under M & M

- Mahindra Aerospace & Defence
- Mahindra Aftermarket
- Mahindra Automotive
- Mahindra Farm Equipment
- Mahindra Financial Services
- Mahindra Hospitality
- Mahindra Information Technology
- Mahindra Partners
- Mahindra Real Estate
- Mahindra Two Wheelers

TEN SECTORS. MANY COMPANIES. ONE PURPOSE.

...in 10 business sectors... ...in 20 industries...
We are India’s leading **steel solutions** company
Mahindra Accelo – current and future businesses

Current portfolio
- Automotive
- Power
- Electrical Stampings
- Purlins
- Auto Recycling

Future portfolio inclusions
- High end auto stampings
- Future materials
- Technology driven
- New area of Recycling
- EV Motor cores
Our subsidiaries

Steel solutions
- Mahindra Intertrade Ltd.
  - JV with Metal one corporation, Japan
  - JV with Nippon steel & Sumitomo metal corp., Japan
  - JV with China steel global trading co., Taiwan and Mitsui & co., Japan
- Mahindra Steel Service Centre
- Mahindra Middle East Steel
- Mahindra Auto Steel
- Mahindra Electrical Steel Pvt. Ltd.

Recycling
- JV with MSTC, a GoI enterprise
Our Products & Services

Automotive steel

- Slitting
- Blanking / profiling
- Shearing

Electrical steel

Power
- Slitting
- Lamination core stacks
- Built – up cores
- Core Coil Assembly
- Flux Plate

Home appliances
- Slitting
- Electrical stampings
- Stators and rotors
Our Products & Services

Recycling
- Cars
- Trucks and buses
- 2 Wheelers
- Industrial scrap
- Home appliances

Structural steel
- Purlins for solar
- Purlins Construction
Mahindra Accelo – Domestic Steel Service Centre network

Mahindra Intertrade Ltd.
Vadodara (2008)

Mahindra Steel Service Centre Ltd.
Pune (1993)

Mahindra Steel Service Centre Ltd.
Pune (2012)

Mahindra Intertrade Ltd.
Nashik (2007)

Mahindra Auto Steel Pvt. Ltd.
Chakan (2015)

Mahindra Steel Service Centre Ltd.
Noida (2018)

Mahindra Steel Service Centre Ltd.
Chennai (Upcoming)

Mahindra Intertrade Ltd.
Gujarat (Upcoming)

Mahindra Steel Service Centre Ltd.
Bhopal (2010)

Electrical steel processing

Auto & Electrical steel processing

Electrical steel processing

Auto steel processing

Electrical steel processing
Uniqueness of production process

State of art manufacturing facility

1) Auto: First service centre in the organized sector

2) CRGO: Sole processor of Nippon Steel in India

3) CRNO: All processes e.g. Slitting, Stampings, Stress Relieving, Rotor Aluminum Injection, etc. under one roof.

World class facility with implementation of lean techniques
Our offerings to India Power market
In PT customers … We dominate the market.

CRGO PT market, India ~ 100,000tpa

(~ 40% market share)
DT market

2000s

❖ CRGO Scrap Imports
❖ Higher losses
❖ Low life
❖ Poor Performance
❖ Conventional Grades, M4/M5

Today

❖ Scrap Imports restricted.
❖ Most stringent efficiency laws
❖ Better performance
❖ Conventional grades completely phased out from DT market.

Requirement for World class electrical steel to meet industrial demand.

23HIB+ 23DR usage > 90%
Our Product offerings

1. **Product Quality is Stable.**
   - Use of the most advanced manufacturing equipment and strict quality control ensures a product of stable quality every time.

2. **Core Losses are Extremely Low in the Rolling Direction.**
   - Extremely low core losses can be achieved in the rolling direction. ORIENTCORE - Hi B is superior in directional property to ORIENTCORE, and ORIENTCORE - Hi B - LS, ORIENTCORE - Hi B - PM offer far lower core losses.

3. **Permeability is Extremely High in the Rolling Direction.**
   - Due to their excellent directional property, these electrical steel sheets show extremely high permeability in the rolling direction in all magnetic fields, high or low. ORIENTCORE - Hi B, ORIENTCORE - Hi B - LS, and ORIENTCORE - Hi B - PM exhibit a magnetic flux density about 0.1 times higher at B10 than conventional grain-oriented electrical steel sheets.

4. **Lamination Factor is Higher.**
   - Produced by the cold-rolling process, these sheets are well-shapen and have smooth surfaces, leading to higher lamination factors.

5. **Excellent Insulation Coatings are Provided.**
   - 5 coatings - insulation coatings that excel in insulating capability, close adhesion, heat insulation and corrosion resistance - are applied to the sheets’ surfaces.
Our Presence in CRGO steel Market

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<tr>
<th>PT SEGMENT</th>
<th>MARKET SHARE</th>
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<tbody>
<tr>
<td>37,000+</td>
<td>37%</td>
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<table>
<thead>
<tr>
<th>DT SEGMENT</th>
<th>MARKET SHARE</th>
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<tr>
<td>13,000+</td>
<td>6%</td>
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Serving together since 1970s

50,000tpa+
Acello Power Business- Footprints

**Accelo Advantage:**

- Proximity to customers.
- JIT deliveries with minimum waiting/transit time.
- Local access to world class Japanese CRGO.
We add value for our customers-Built up core supplies

- Clamp setup
- Building
- Clamping
- Testing
- Tilting
- Packing
YoY Growth in Value added products

CORE ASSEMBLEY SUPPLIES

Beginning of SPT core supply

≈ 30% growth

F16  F17  F18  F19

CORE ASSEMBLEY SUPPLIES

Power (CORE ASSEMBLEY SUPPLIES)
Customers can focus on their core business of transformer manufacturing (forward integration) rather than spending time on built-up cores (backward integration).
Sustainability
✓ Synergy with Mahindra Susten-Solar EPC provider.
✓ Purlins for Solar.

✓ Shifting towards zero wood usage- supply material on Metal Pallets to major customers.

✓ Low loss material, input for most efficient transformers.
✓ Better energy savings.
Mahindra Accelo Team receiving the coveted JIPM TPM Excellence Award ‘A’ Category at Kyoto, Japan on 23rd March 2017
THANK YOU