

TATA STEEL



The  
**WORLD** of  
**STEEL**

A Corporate Brochure



# Contents

<b>The World of Tata Steel</b>	<b>1</b>
<b>Tata Group Overview</b>	<b>2</b>
A Tradition of Trust and Transparency	4
Touching Every Sphere of Life	6
A Diversified Global Footprint	8
An Enduring Value System	10
Leaders and Legends	12
<b>Tata Steel Group Overview</b>	<b>14</b>
A Global Conglomerate	16
Sustainable Business Value Chain	18
A Range of Products and Brands for Every Requirement	20
Operations Across Continents	22
Driven by a Vision. Upheld by Values.	24
At the Helm	26
<b>Tata Steel Group - Global Footprint</b>	<b>28</b>
Indian Operations	30
<i>Jamshedpur</i>	38
<i>Kalinganagar</i>	44
<i>Gopalpur</i>	46
Global Operations	
<i>Europe</i>	48
<i>South East Asia</i>	54
Raw Materials	58
<b>The Bigger Picture: CSR Initiatives</b>	<b>62</b>
<b>Pillars of Sustainability</b>	<b>76</b>
<b>Tata Steel Group Companies Overview</b>	<b>86</b>

*Cover photo: Mumbai's Bandra-Worli Sea Link Road. Tata Steel Wire Division has been the sole supplier of pre-stressed concrete strands used in the 8-lane sea link.*



# The WORLD of Tata Steel

The story of Tata Steel is not a simple one. It is the story of a vision. A story of a company that became a movement. And, a story of generations of people with a common mission.

Today, it is the story of a global conglomerate that has crossed geographical boundaries and established its presence across countries and continents. The Tata Steel world is one that embraces different skills celebrating its diversity; it is one that strives for continuous innovation with end-to-end solutions; and one that continues to act responsibly in its use of natural resources. Its commitment to the environment, so deeply embedded in its very ethos, has found expression in its environment-friendly processes that ensure it produces 'Green Steel' in all its facilities.

Above all, its enduring commitment to give back to society, helps make the vision of sustainable growth a reality. A commitment that is truly a way of life for every employee of Tata Steel anywhere in the world.

The focus on sustainable growth has never wavered. The impact of this can be seen in lives that have changed; in strategies that make a difference; in performance; in creating a more inclusive society that is more efficient and more environment-friendly; and eventually in the way business is done.



# TATA GROUP OVERVIEW

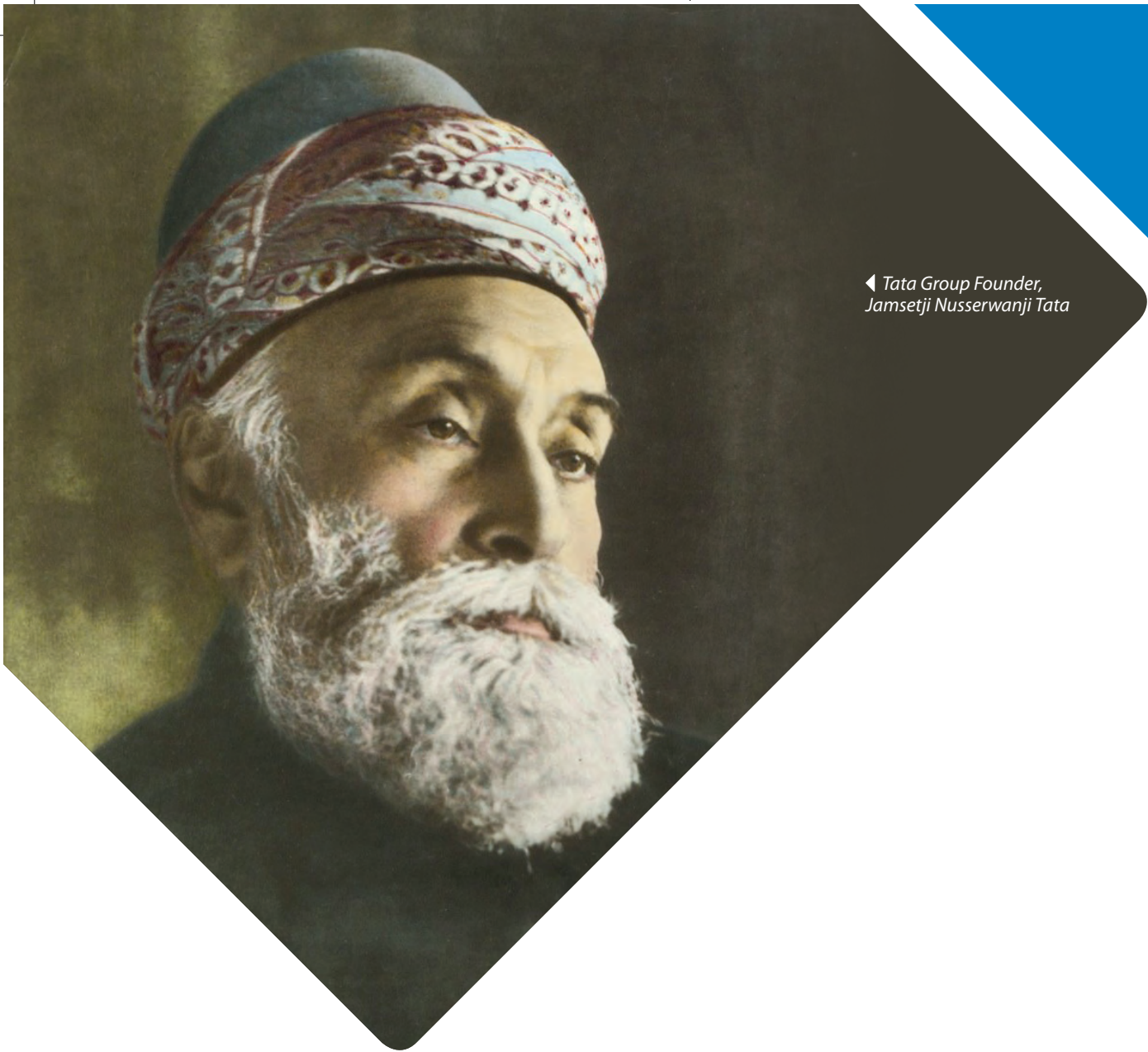


LEADERSHIP  
WITH TRUST

▲ Women leading from the front at the Tata Steel Jamshedpur plant

▼ Honing talents through the Tata Steel Chess  
Tournament, the Netherlands

COMMITMENT  
WITH INTEGRITY



◀ Tata Group Founder,  
Jamsetji Nusserwanji Tata

## TATA GROUP OVERVIEW

# A TRADITION OF TRUST AND TRANSPARENCY

The Tata name represents true enterprise. The journey began with J N Tata who endeavoured to think the then unthinkable, and lay the foundations of a company that was to become a global enterprise. An enterprise that sought to create resources for a nation, livelihood for generations, a benchmark for future corporations, work ethics that stay relevant even today.

Over the century of its existence, every stakeholder of the Tata Group has striven to follow the vision of Jamsetji Tata. To a vision that has been built on the foundation of trust and transparency. To a vision of

working towards common good. To a belief of achieving heights of success through hard-work and commitment.

A **global business** group with products and services in over **150 countries**.  
 Over **660,000** employees and **operations** in over **100 countries**. Group revenue of **\$103.51 bn** with **67.3%** generated in **geographies** outside India.  
**Global leader** in several sectors.

The **market capitalisation** of the **29 companies** listed under the Tata Group is **US\$ 116.41 bn.**  
 (As on March 31, 2016)



“  
 Our mission is to improve the quality of life of the communities we serve globally through long-term stakeholder value creation based on Leadership with Trust.  
 ”

### THE SPIRIT OF ENTERPRISE OF THE TATA GROUP

Founded by Jamsetji Nusserwanji Tata in 1868 and headquartered in India, the Tata Group is a true global enterprise. With operations in over 100 countries across six continents, the Tata Group has for over a century been synonymous with sound governance and sustainable business practices.

Driven by a spirit of enterprise, the Tata Group has spawned several industries of global importance – steel, hydropower and airlines, among others. A significant number of Tata companies are global leaders and impact life in the farthest corners of the globe.

One such company for the Tata Group is Tata Steel. The world of Tata Steel is one without boundaries – growing, changing and challenging every day. A world that embraces different skills, continuous innovation, financial investment and responsible use of natural resources. This is the world in which Tata Steel seeks to excel, by providing the best quality products and the best possible service to its customers.

# TOUCHING EVERY SPHERE OF LIFE

Shaped by a lineage of sound and straightforward business principles, of considering the interests of shareholders paramount, the health and welfare of employees vital, and the community and society intrinsic to its existence, Tata Group has been built on a strong foundation of trust and transparency.

Tata Group today touches lives in virtually every walk of life. From its early foray into steel and automobiles, to staying abreast of the latest technologies with its global presence in telecommunication and information technology, it has a strong presence across industries including agrochemicals, automotive, chemicals, construction, finance, consumer products, hospitality, logistics, power, mining, media and entertainment, and retail.

Today, various Tata companies have significant investments in different geographies, and many of these have achieved a position of leadership in their areas of operation.

Cutting-edge innovation and a focus on quality and business excellence are the hallmarks of the trust the Tata name is recognised for.







# GLOBAL RANKING OF TATA GROUP

## Global Ranking

**Tata Communications**  
International voice  
(wholesale)

1st  
Volume



**Tata Global Beverages**  
Tea products

2nd



**Tata Chemicals**  
Soda ash

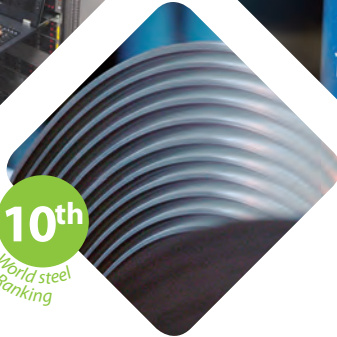
2nd



2nd  
Market Cap  
and Profit



10th  
World steel  
Ranking



Top  
10



**Tata Consultancy Services**  
IT services

**Tata Steel**  
Steel

**Tata Motors**  
Buses and trucks

## India Ranking

**Titan Company**  
Largest manufacturer of branded  
watches and jewellery



**Tata Power**  
Largest integrated  
power company



**Tata AutoComp**  
Leading auto-component  
conglomerate



**Voltas**  
Market leader in room  
air conditioners



**Tata Technologies**  
Largest pure play  
engineering and design  
services provider



**Taj**  
One of Asia's  
largest and finest  
group of hotels



**Croma**  
Leading omni-  
channel electronics  
retailer in India

# A DIVERSIFIED GLOBAL FOOTPRINT



## NORTH AMERICA

- Jaguar Land Rover
- Taj Hotels Resorts and Palaces
- Tata Business Support Services
- Tata Chemicals North America
- Tata Communications
- Tata Consultancy Services
- Tata Elxsi
- Tata Global Beverages
- Tata Interactive Systems
- Tata International
- Tata Sons North America
- Tata Steel Europe
- Tata Steel Minerals Canada
- Tata Technologies

## EUROPE

- Jaguar Land Rover
- Taj Hotels Resorts and Palaces
- Tata Capital
- Tata Chemicals Europe
- Tata Communications
- Tata Consultancy Services
- Tata Elxsi
- Tata Global Beverages
- Tata Interactive Systems
- Tata Limited
- Tata Motors European Technical Centre
- Tata Steel Europe
- Tata Technologies
- TKM Global GmbH

## Rest of AFRICA

- Jaguar Land Rover
- Taj Hotels Resorts and Palaces
- Tata Africa Holdings
- Tata Chemicals Magadi
- Tata Consultancy Services
- Tata Consulting Engineers
- Tata Global Beverages
- Tata International Distribution
- Tata Motors (SA)
- Tata Power
- Tata Projects
- Tata Steel
- Titan Company

## SOUTH AMERICA

- Jaguar Land Rover
- Rallis
- Tata Communications
- Tata Consultancy Services
- Tata International
- Tata Motors

“  
 The Tata footprint covers the world with operations in more than 100 countries spread across six continents and over 660,800 employees worldwide.  
 ”

The Tata Group has taken giant strides across geographies, putting its products into the hands of customers located in the far corners of the world. It has built facilities and operations in every region, creating jobs for millions of people. With a diverse portfolio, brand Tata is today visible in multiple industries and segments.

**CHINA**

- Chery Jaguar Land Rover Automotive
- Jaguar Land Rover China
- Nanjing Tata AutoComp
- Tata Communications
- Tata Consultancy Services
- Tata Global Beverages
- Tata Projects
- Tata Sons China
- Tata South East Asia
- Tata Steel Asia
- Tata Steel International
- Tata Technologies
- TKM Global China
- TRL Krosaki Refractories
- York Transport



**MIDDLE EAST and NORTH AFRICA**

- Jaguar Land Rover
- Taj Hotels Resorts and Palaces
- Tata Communications
- Tata Consultancy Services
- Tata Consulting Engineers
- Tata Elxsi
- Tata Global Beverages
- Tata Interactive Systems
- Tata Motors
- Tata Power
- Tata Projects
- Tata Technologies
- Tata International West Asia DMCC
- Titan Company
- TM International Logistics
- Voltas
- York Group

**INDIA**

Headquarters of Tata Sons and majority of the Group companies including Tata Steel.

**SOUTH EAST ASIA, EAST ASIA and SOUTH ASIA**

- Jaguar Land Rover
- JOil
- NatSteel Holdings
- Taj Hotels Resorts and Palaces
- Tata AutoComp
- Tata Capital
- Tata Chemicals International
- Tata Communications
- Tata Consultancy Services
- Tata Daewoo
- Tata Global Beverages
- Tata International
- Tata Motors
- Tata NYK
- Tata Petrodyne
- Tata Power International
- Tata Steel Global Holdings
- Tata Steel Thailand
- Tata Technologies
- Titan Company
- TM International Logistics
- Trust Energy Resources
- Voltas
- York Group

**AUSTRALIA**

- Jaguar Land Rover
- Tata Communications
- Tata Consultancy Services
- Tata Global Beverages
- Tata Motors
- Tata Power
- TM International Logistics

# AN ENDURING VALUE SYSTEM

The Tata Group's value system is integral to Tata Steel's century-old tradition and continues to direct the growth and business of its companies. Time, energy and effort is continually expended on defining, refining and driving the value systems to anyone who comes into the Tata Group fold – whether it be employee, partner, or customer.



## Excellence

We will be passionate about achieving the highest standards of quality, always promoting meritocracy.



## Integrity

We will be fair, honest, transparent and ethical in our conduct; everything we do must stand the test of public scrutiny.

## OUR VALUES



## Pioneering

We will be bold and agile, courageously taking on challenges, using deep customer insight to develop innovative solutions.



## Responsibility

We will integrate environmental and social principles in our businesses, ensuring that what comes from the people goes back to the people many times over.



## Unity

We will invest in our people and partners, enable continuous learning, and build caring and collaborative relationships based on trust and mutual respect.

# MILESTONES IN THE JOURNEY TOWARDS EXCELLENCE

The Tata Group has played a pioneering role in industrial practices in India and has embarked on some path-breaking initiatives, many that were well ahead of their time and have made a global impact.



# LEADERS AND LEGENDS

Over the decades of its existence, the Tata Group has had at its helm visionaries and business giants, each of whom have played a defining role in shaping the Group to become the global organisation that it is today.



**Jamsetji N Tata**  
Chairman (1868–1904)

The founder of the Tata Group, was a visionary, nationalist, philanthropist and humanist. He pioneered India's industrialisation at the turn of the 20th century, injecting a lasting passion and spirit of enterprise that was to last for centuries. He also introduced industrial welfare practices, well before their time.



**Sir Dorabji Tata**  
Chairman (1904–1932)

The eldest son of JN Tata, Sir Dorabji continued building on his father's vision and set up Tata Steel and Tata Power. He also founded the Indian Institute of Science.



**Sir Nowroji Saklatwala**  
Chairman (1932–1938)

Helmed the Group during the Great Depression. He is remembered for helping establish the Tata Memorial Hospital and being instrumental in introducing benefits such as profit sharing for employees.



## JRD Tata

Chairman (1938–1991)

Led the Group into several new businesses, including chemicals, locomotives, trucks, beverages, information technology and civil aviation. He was also the moving force behind setting up institutions for research in the fundamental sciences, social sciences and performing arts.



## Ratan Tata

Chairman Emeritus (1992–2012)

Interim Chairman (2016)

Chairman Emeritus (2016-till date)

Spearheaded the Tata Group's international expansion. He consolidated the Group and led its entry into passenger vehicles, retail and aerospace, while establishing Group-wide enablers for business excellence, innovation and customer orientation.



## Cyrus P Mistry

Chairman (2012–2016)

He was the Chairman of the Board of Tata Sons and several Tata Group Companies till 2016. He built upon the vision of the founder and steered the Group into the digital world.



## Natarajan Chandrasekaran

Chairman (2017 onwards)

He is the Chairman of Tata Sons Limited and the Chief Executive Officer and Managing Director of Tata Consultancy Services (TCS), also appointed as a Director of the Reserve Bank of India in 2016. He was designated the Chairman of Tata Sons on February 21, 2017.

# TATA STEEL GROUP OVERVIEW

DRIVING  
EXCELLENCE





# BUILDING VALUES

TERM END TEST FOR CLASS - III

Sri Mata's Public School, Bangalore

10th August 2014 (Sunday)

Roll No. / Name	
Class / Section	
Subject / Teacher's Name	
Teacher's Name	



◀ Using latest technology and equipment in our European operations gives us an edge in the market.

## TATA STEEL GROUP OVERVIEW

# A GLOBAL CONGLOMERATE

The world of Tata Steel is one without boundaries – growing, changing and challenging. As one of the world's most geographically-diversified steel producer, Tata Steel is not only meeting the current needs of the global customer base but also developing exciting new solutions that deliver additional value to the customers in future.

Millions of people across the world are touched by the steel that Tata Steel produces. From the cars they drive, to the homes they live in, from the bridges they cross, to the pipes that bring them water and delivering the quality it is trusted for, is a responsibility that Tata Steel takes very seriously.

Driven by a culture of performance, the Tata Steel Group is committed to aspiration targets, safety and social responsibility, continuous improvement, openness and transparency.

With operations in **26 countries**, a **commercial presence** in over **50 countries**, and employees across **five continents** – the Tata Steel Group was **established in 1907** as Asia's first integrated private sector steel company. Today, it is among the **leading global steel companies** with an annual crude steel capacity of nearly **28 million tonnes** per annum.

It is also the **world's second-most** geographically-diversified **steel producer**. The Group recorded annual turnover of **US\$ 18.11 bn** and annual production of **23.88 million tonnes** in the financial year 2016-17.



◀ Blast furnace in Kalinganagar

◀ Pan view of Jamshedpur steel plant

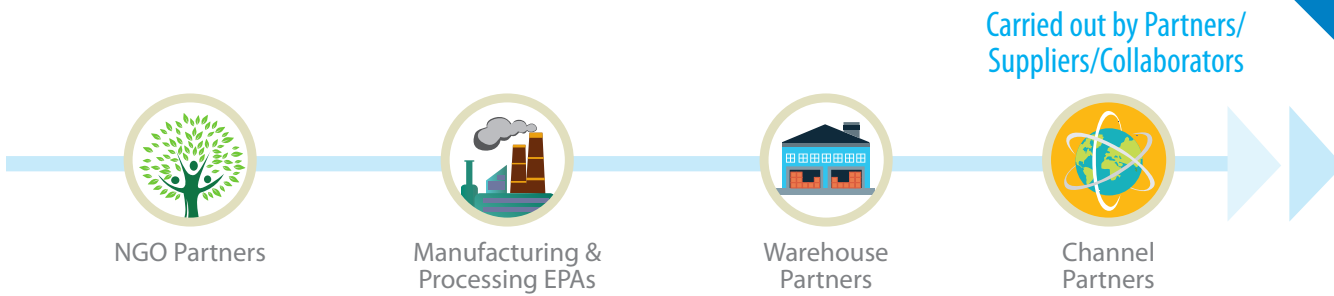
- SOME OF THE NOTABLE AWARDS RECEIVED BY TATA STEEL GROUP**
- » Golden Peacock Award for Risk Management, 2015
  - » DJSI (Dow Jones Sustainability Index) Results 2015 – Tata Steel achieved best-ever score
  - » Carbon Disclosure – CDP 2015 Results of Disclosure Assessment – Tata Steel scores maximum 100% on CDLI, 2015
  - » Dun & Bradstreet Corporate Award, 2015
  - » Golden Peacock Global Award for Sustainability, 2015
  - » World's Most Ethical Companies, 2016
  - » Dow Jones Sustainability Award, 2016

# SUSTAINABLE BUSINESS VALUE CHAIN

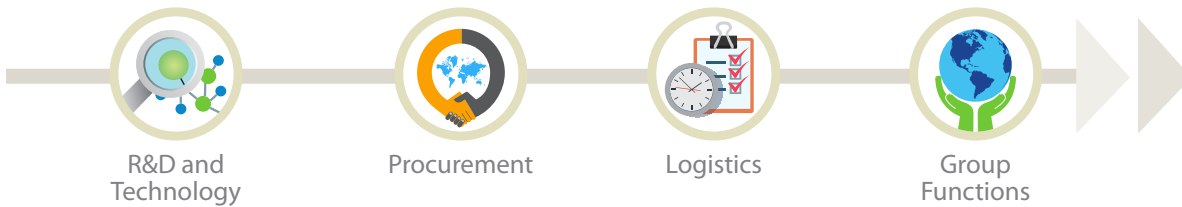
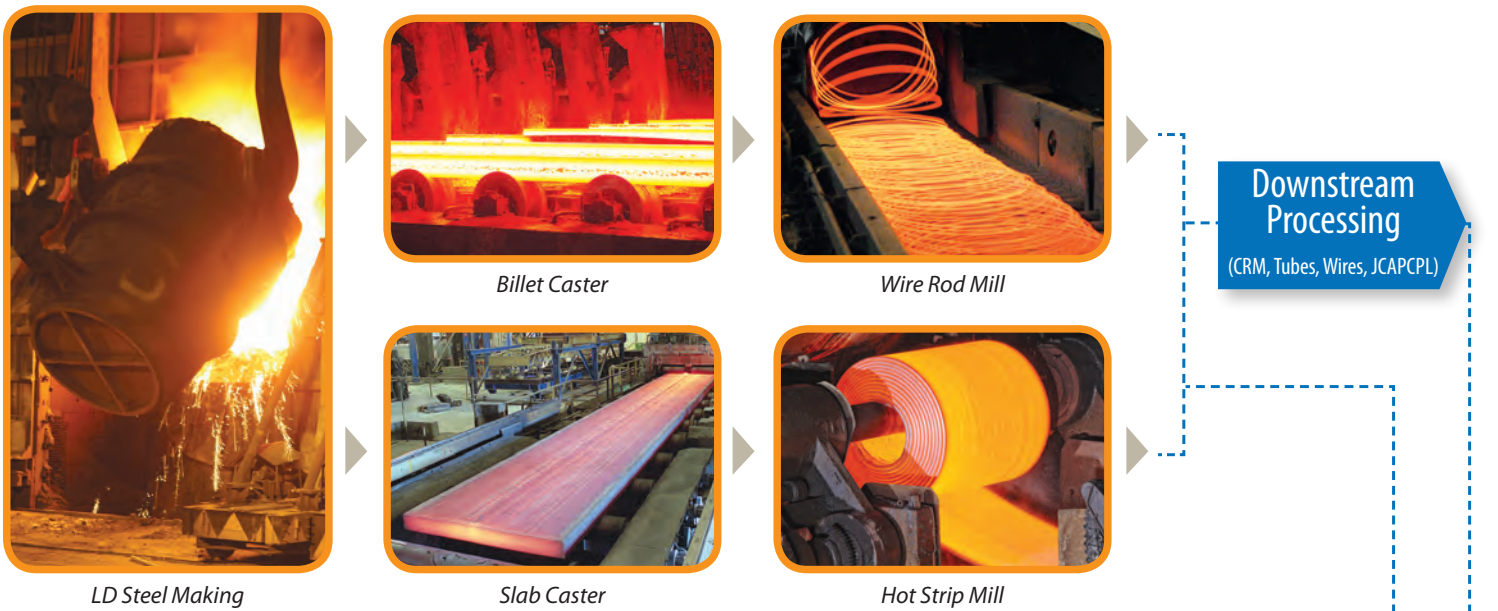


## BUSINESS VALUE CHAIN

- (a) **Steel Value Chain** – from captive mining to downstream steel businesses
- (b) **Raw Materials Value Chain** – mining of chrome and manganese ore to production and sale of ferro-alloys and minerals
- (c) **Other Businesses** – such as equipment manufacturing, bearings and agricultural equipment manufacturing



## STEEL MANUFACTURING



## MARKETING AND SALES VERTICALS

Tata Steel changed the traditional Flat Products/Long Products Profit Centre concept and divided the steel business into three business verticals:

**Automotive and Special Products (A&SP):** This vertical sells Auto grade at steel products to the Indian automotive manufacturers.

**Branded Products, Retail and Solutions (BPRS):** The steel brands in Flat Products and Long Products come under this vertical.

**Industrial Products, Projects and Exports (IPPE):** This vertical caters to Large Commercial Accounts and Small & Medium Enterprises.

# A RANGE OF PRODUCTS AND BRANDS FOR EVERY REQUIREMENT

Recognising global customer needs and market trends, Tata Steel has made inroads into countries across the world with products and brands to meet different requirements.

▼ Tata Steel Jamshedpur plant



Odisha

Jharkhand

**Product Range**

- ★ Hot Rolled Coil
- ★ Cold Rolled Coil
- ★ Galvanised coil
- ★ Wire Rod
- ★ Rebar
- ★ Tubes

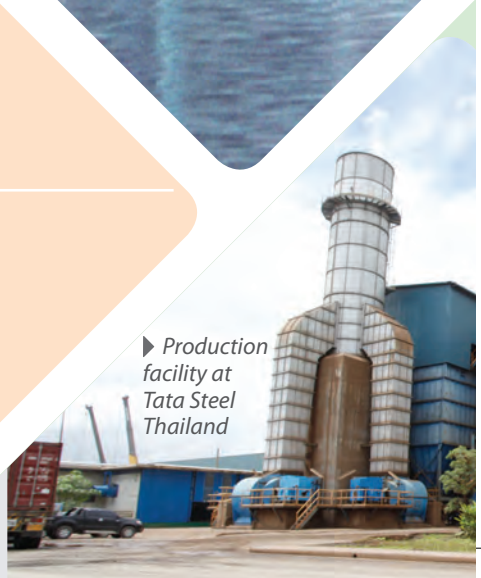
**Key Market Segments**

- ★ Construction
- ★ Automotive
- ★ General Engineering
- ★ Industrial Products
- ★ Agriculture

**Key Brands**



► Production facility at Tata Steel Thailand



# EUROPE

## UK

### Product Range

#### Flat Products

#### Automotive Products

- ★ Hot Rolled
- ★ Direct Rolled
- ★ Metallic Coated
- ★ Electrical Sheets

## The Netherlands

### Long Products

- ★ Steel Bars
- ★ Tubes

### Solutions

- ★ Walls
- ★ Ancillaries
- ★ Purlins and C21 ladding Rails
- ★ Roof

### Services

- ★ Consulting

### Key Brands

YMagine

Protact

MagiZinc

Trisobuild

ComFlor

Coretinium

Colorcoat

### Key Market Segments

- ★ Sporting Ammunition
- ★ Electrical
- ★ Automotive & Fluid Handling
- ★ Household Products
- ★ Office Products
- ★ ICT Products

► Port Talbot plant, Wales

# SOUTH EAST ASIA

## Singapore

### Product Range

- ★ Rebar
- ★ Wire Rod
- ★ Cut and Bend Solution
- ★ Welded Mesh
- ★ Bored Pile
- ★ Pre-fabricated cages

### Key Market Segments

- ★ Large Pile Caps
- ★ Basement Heavy Slabs, RC Walls, MRT Stations (UG / AG)
- ★ Cut & Cover Tunnels
- ★ Roads and Bridge Decks

## Thailand

### Product Range

- ★ Rebars
- ★ Wire Rods
- ★ Cut and Bend Special Bars
- ★ Small Sections

### Key Market Segments

- ★ Construction

### Key Brands



# OPERATIONS ACROSS CONTINENTS

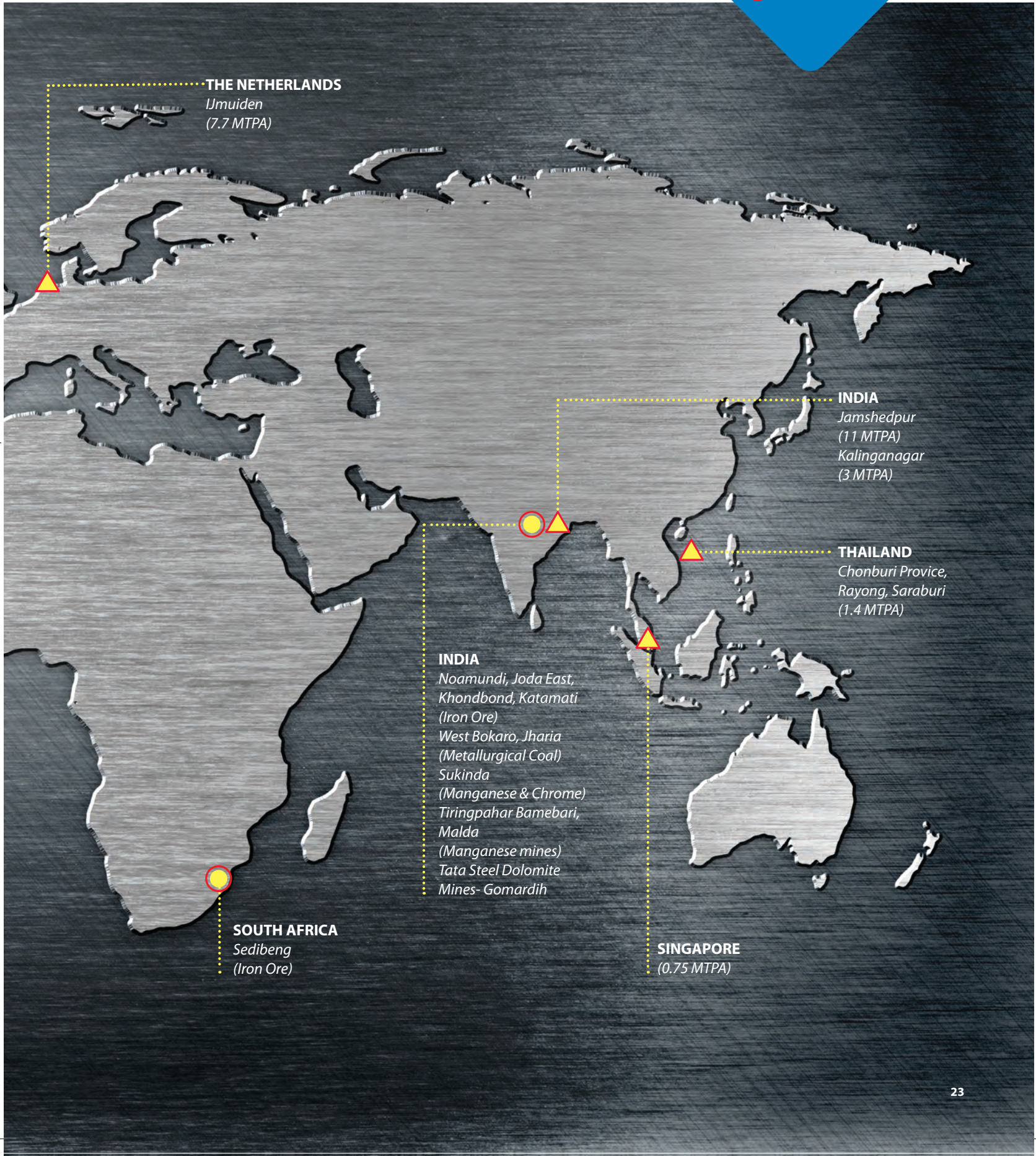


**UK**  
Port Talbot  
(4.6 MTPA)

**CANADA**  
Iron Ore Mines  
Quebec,  
Newfoundland  
& Labrador



With operations in strategic locations across the world, Tata Steel has enhanced capacities, while also ensuring integrated efficiencies.



# DRIVEN BY A VISION. UPHELD BY VALUES.

The Tata Steel vision is the outcome of a deep and enduring culture of ethics; a belief in the highest standards of corporate governance; and a commitment to give back to society. Shaped by a lineage of sound and straightforward business principles; of considering the interests of shareholders paramount; the health and welfare of employees vital; and the community and society intrinsic to its existence; the various companies of the Tata Steel group stay true to these founding business principles. As every company carves out a position of business leadership in its area of operation; operating with trust remains at the heart of every success.

▼ *Employee ensures quality check in the plant operations*

## The Tata Steel Vision

We aspire to be the global steel industry benchmark for Value Creation and Corporate Citizenship. We make the difference through:

### Our People

By fostering teamwork, nurturing talent, enhancing leadership capability and acting with pace, pride and passion.

### Our Offer

By becoming the supplier of choice, delivering premium products and services, and creating value for our customers.

### Our Innovative Approach

By developing leading-edge solutions in technology, processes and products.

### Our Conduct

By providing a safe workplace, respecting the environment, caring for our communities and demonstrating high ethical standards.

### Policies

In adherence to the Tata Code of Conduct, Tata Steel's policies pertain to active sets of principles in different areas of operation that help bring uniformity in processes by clearly defining the Company's approach.



# TATA STEEL MILESTONES

**1907**  
Tata Steel was registered as a company

**1912**  
Second Blast Furnace became operational and 8-hour working day was introduced

**1920**  
Leave with pay and Workers' Provident Fund Scheme introduced in India

**1943**  
Tatanagar Tank for WW II manufactured

**1994**  
Received Prime Minister's trophy for the 'Best Integrated Steel plant' for the first time

**1980**  
First phase of four-phased modernisation commenced and Social Audit started

**2004**  
75 years of Industrial Harmony celebrated with the then President of India Dr APJ Abdul Kalam as Chief Guest

**2007**  
London-based steel manufacturer Corus Group acquired

**2012**  
The Deming Grand Prize

**2005**  
Acquired Millennium Steel in Thailand

**2014**  
Inaugurated India's first Continuous Annealing & Processing Line

**2016**  
Commencement of Tata Steel Kalinganagar plant operations

▼ School facilities for children are provided in the rehabilitation colonies of Sansailo, Kalinganagar



# AT THE HELM

## Board of Directors



- ❶ Natarajan Chandrasekaran
- ❷ Ishaat Hussain
- ❸ Andrew M. Robb
- ❹ Mallika Srinivasan
- ❺ DK Mehrotra
- ❻ OP Bhatt
- ❼ Dr Peter Blauwhoff
- ❽ Aman Mehta
- ❾ Deepak Kapoor
- ❿ Koushik Chatterjee
- ⓫ TV Narendran

The Tata Steel Group is led by industry stalwarts who guide and steer the company towards sustainable growth. Its operations and successes are overseen and managed by a capable leadership team that has a vast collective experience in managing multinational conglomerates.

## Executive Management



T V Narendran  
Managing Director,  
Tata Steel India & SEA



Koushik Chatterjee  
Group Executive Director  
(Finance, Corporate & Europe), Tata Steel



Hans Fischer  
Chief Executive Officer  
Tata Steel Europe

# GLOBAL FOOTPRINT

▼ The Tata Steel Kalinganagar plant during the construction phase

EXPANDING GEOGRAPHIES



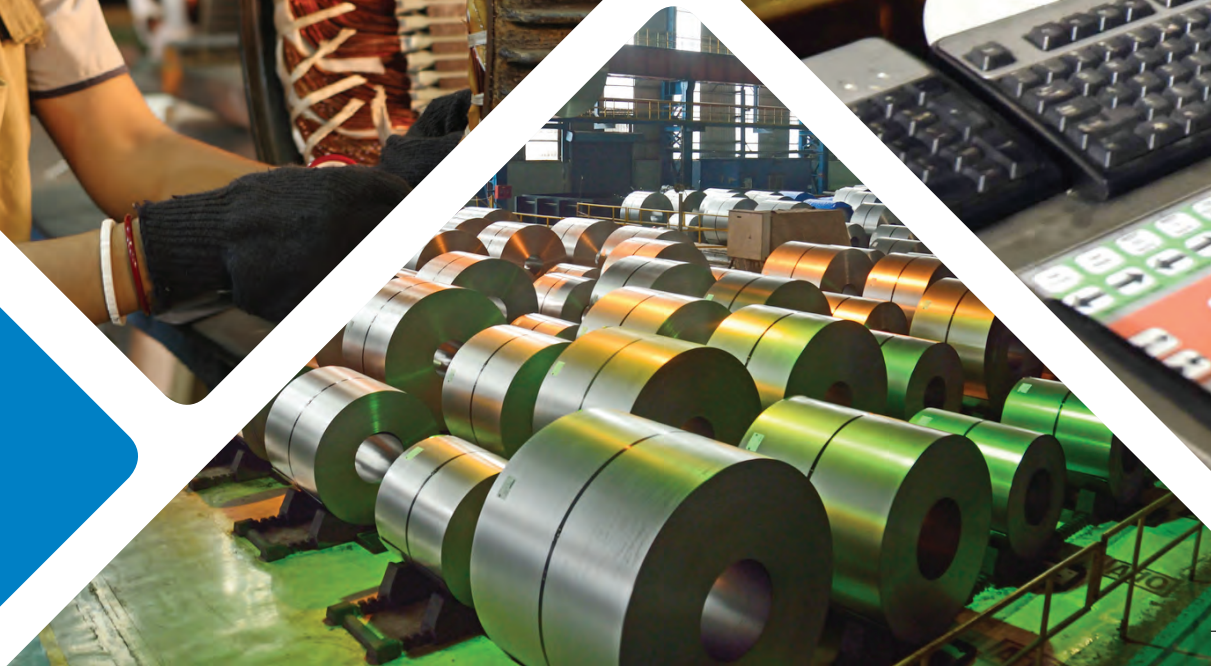
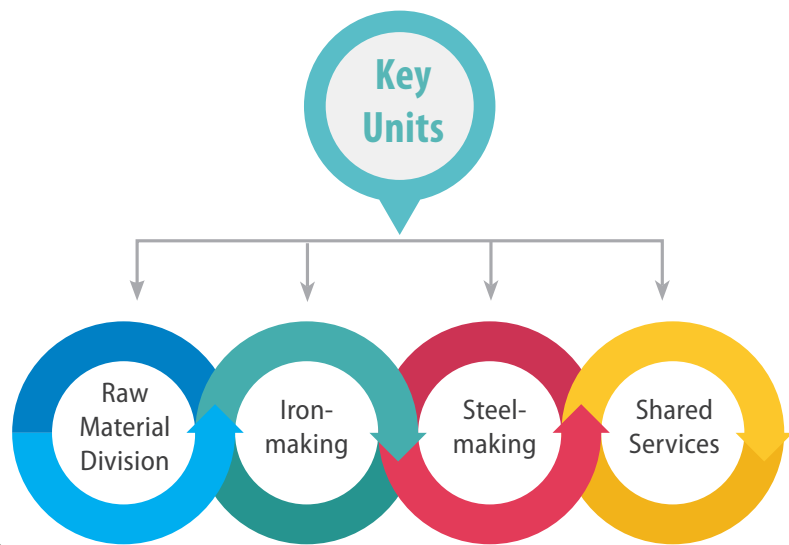
# PROTECTING ECOLOGIES

▲ The Dimna Lake in Jamshedpur is an artificial reservoir and one of the main sources of the city's drinking water

# A LEADER AND PIONEER

Tata Steel group has continually focussed on driving and maintaining excellence in operations through relentless drive for improvement in process, product and people.

Today, Tata Steel is one of the few steel operations that is fully integrated – from mining to manufacturing and marketing of finished products. It is also the lowest cost producer of steel in India. Following a growth strategy of capacity augmentation through Brownfield and Greenfield projects, the capacity expansion plans in Jamshedpur and Kalinganagar will help strengthen the product portfolio in India while rebalancing steel-making capacities across the Group.





Total capacity  
**13 MTPA**

Jamshedpur (~11 MTPA)  
Kalinganagar (3 MTPA)



# CUSTOMER-CENTRIC DIVERSIFIED STEEL PRODUCER

Continuous improvement in our product and service portfolio, along with success in value creating initiatives for customers, has led to the Company's unique position to serve global growth markets.



## Key product range of Tata Steel

	Main Products	Areas of Application
AUTOMOTIVE AND SPECIAL PRODUCTS	Hot Rolled (HR) - Dry, Pickled, Skin Pass	Commercial Vehicles
	High Tensile HR (SPFH, Tisten, DD)	Wheels, Axles, Drum Brakes
	CR Skin Panels, IF, IFHS	Passenger Vehicles
	GA/GI-Skin Panels, Fuel Tanks, Internals	Two Wheelers and Passenger Vehicles
BRANDED PRODUCTS, RETAIL & SOLUTIONS	HR for distribution	Tubes, Projects and Fabrication, Yellow goods etc.
	CR for Distribution	Auto Ancillaries, Panels, Furnitures
	Galvanised Corrugated Sheets	Roofing
	Galvanised Plain (GP)	Appliances, Panels, Bus body and General Engineering
	Rebars-Retail	Housing
	Rebars-Projects	Infrastructure, Commercial and Industrial Complexes, SMEs
INDUSTRIAL PRODUCTS, PRODUCTS	High Carbon Wire Rods	Automotive
	Low Carbon Wire Rods	Continuous Welding Electrodes, Stick Electrodes
	HR for cold rolling/tubing	Secondary Rollers and Tubers
	HR for LPG	LPG Cylinders
	Structural Grade HR	Pre-Engineered Building, Lifting & Excavation, Construction Projects
	HR (Corten), HR (Cu)	Railways
	CR-Drawing and EDD grades	Packaging and Furniture



Packaging




Railway Wagon



Furnitures

# THE BRAND PORTFOLIO

	Rebars	<ul style="list-style-type: none"> <li>▶ Market leader in rebar industry with a wide range of products including Super Ductile (SD), Tiscon 500 D, SD, TISCON Superlinks and TataFootings.</li> </ul>
	Sheets and coil	<ul style="list-style-type: none"> <li>▶ Galvano is the first zero-spangled Galvanised Plain (GP) Steel offering in the country.</li> <li>▶ Its unique characteristics include consistent thickness, superior surface finish and flatness, highest corrosion resistance and uniform and superior zinc adhesion.</li> </ul>
	Sheets	<ul style="list-style-type: none"> <li>▶ Leading brand in India's roofing industry known for its longevity and strength.</li> <li>▶ Known for its longevity and strength, it is the leading brand in India's roofing industry.</li> <li>▶ A complete roofing solution for homes, factories, offices, sheds, etc.</li> </ul>
	Sheets	<ul style="list-style-type: none"> <li>▶ Creating value through ease in purchase and consumption of cold rolled steel.</li> <li>▶ It offers dedicated application engineering support to each customer, irrespective of their location and segment.</li> </ul>
	Sheets and coils	<ul style="list-style-type: none"> <li>▶ A high-tech production line producing consistent high-quality sheets and coils.</li> <li>▶ Serves market segments like automotive, railways, yellow goods, agriculture and fabrication.</li> </ul>
	Pipes	<ul style="list-style-type: none"> <li>▶ High-quality welded pipes.</li> <li>▶ Used mainly to carry liquids and low pressure gases.</li> <li>▶ Recognised for ease of installation, ease of water and gas flow, durable corrosion resistance and longevity.</li> </ul>
	Tubes	<ul style="list-style-type: none"> <li>▶ Formed and welded tubes with high precision.</li> <li>▶ Caters to the automotive, boiler and general engineering segments.</li> <li>▶ A robust supply chain, logistic capabilities and product delivery expertise.</li> <li>▶ Offers solutions to automotive OEM and ancillary customers.</li> </ul>

 <p>automotive steels FROM <b>TATA STEEL</b></p>	<p>Hot Rolled, Cold Rolled, Coils</p>	<ul style="list-style-type: none"> <li>▶ Material of choice for top automotive and original equipment manufacturer.</li> <li>▶ A high-strength, high-yield automotive steel with grade.</li> <li>▶ Can be processed by automotive manufacturers' existing machinery.</li> </ul>
 <p><b>TATA STRUCTURA</b> STEEL HOLLOW SECTIONS. THE SHAPE OF THINGS TO COME</p>	<p>Hollow sections</p>	<ul style="list-style-type: none"> <li>▶ High-quality multiple-shape hollow sections used in construction of large structures.</li> <li>▶ Strong aesthetic appeal manufactured from hot rolled coils.</li> <li>▶ Strong compressive strength and enhanced shear capacity.</li> </ul>
 <p><b>TATA WIRON</b> baandhe rishton ke taar</p>	<p>Wires</p>	<ul style="list-style-type: none"> <li>▶ Caters to the needs of various industry segments, such as automotive, infrastructure, power and general engineering as well as farming and fencing .</li> <li>▶ Leader in steel wires, with a 30% market share in the organised wire market in India.</li> </ul>
 <p><b>TATA BEARINGS</b></p>	<p>Bearings</p>	<ul style="list-style-type: none"> <li>▶ Recognised for top-grade performance, endurance, best-in-class reliability and consistency.</li> <li>▶ A wide variety of bearings and auto assemblies.</li> </ul>
 <p><b>TATA AGRICO</b></p>	<p>Agricultural implements</p>	<ul style="list-style-type: none"> <li>▶ A pioneer in superior quality agricultural tools.</li> <li>▶ First choice in agricultural equipment procurement both in the public and private sectors.</li> </ul>
 <p><b>TATA SILCOMAG</b> Bringing Strength to Steel</p>	<p>Ferro alloys</p>	<ul style="list-style-type: none"> <li>▶ India's first branded Silico Manganese product.</li> <li>▶ Offers guarantee of restricted carbon, sulphur and phosphorus, thereby reducing the cost of refining.</li> <li>▶ A range of benefits, including timely on-site delivery, consistency in size and guaranteed availability through its Priority Replenishment Service.</li> </ul>
 <p><b>TATA FERROMAG</b> Bringing Strength to Steel Ferro Alloys from Tata Steel</p>	<p>Ferro alloys</p>	<ul style="list-style-type: none"> <li>▶ A Ferro Manganese brand with consistent ferro alloys and a guarantee of perfect composition, weight and size.</li> <li>▶ Available in customised sizes of 10–50, 10–60, 10–150 and 50–150 mm.</li> </ul>
 <p><b>durashine</b></p>	<p>Sheets</p>	<ul style="list-style-type: none"> <li>▶ A range of roof and wall-cladding products of various finishes and colours.</li> <li>▶ High-heat reflectivity, enabling energy-efficiency.</li> <li>▶ A zinc-aluminium alloy coating providing corrosion-resistance.</li> </ul>

# CUSTOMISED SOLUTIONS AND SERVICES. A GROWING MARKET SHARE.

Venturing into developing new solutions in the emerging sectors has provided a big fillip to expanding the scope of businesses. Branded products and retail solutions segment is targeted to provide an end-to-end customer service.

## Solutions and Services

Tata Steel has embarked on a mission to provide dedicated distribution network and innovative product solutions. Based on market requirements, Tata Steel has innovated several solutions that have resonated with its growing customer base. These include:

**Nest-In** – A complete construction solution, aimed at both individuals and institutions that require a quick, cost-effective and high-quality housing solution.

**Tata Structura Fabrication Solutions** – A team of experts dedicated to execute turnkey solutions for various types of industrial and architectural structures.

**Tata Structura Turnkey Solutions** – Hassle-free execution through turnkey solutions that include designing, fabrication, erections and material supply.

**Tata Structura Studio** – This service has a team of design engineers who cater to consulting and design support needs for any kind of structure with hollow sections.

**Steel n Style** – Exclusive branded furniture stores that give consumers access to high-quality furniture in the latest designs.

**Roof Junction** – A pioneering service introduced by Tata Steel to provide a one-stop roof installation service to retail and institutional consumers.

**Pravesh Doors** – An endeavour to provide value-added steel solutions to individual house builders in semi-urban and rural markets.

**Tiscon Superlinks** – Stirrups (rings) made of high strength ribbed TMT reinforcement bar in most commonly used sizes.

**Tiscon Footing** – A prefabricated rebar kit, introduced by Tata Tiscon. The objective of this kit is to minimise fabrication mistakes at site, speed up construction and provide relief from unnecessary challenges faced.

**Tata Shaktee Ridge** – Offers branded roofing accessories to cater to the specific demands of the individual house-builder.



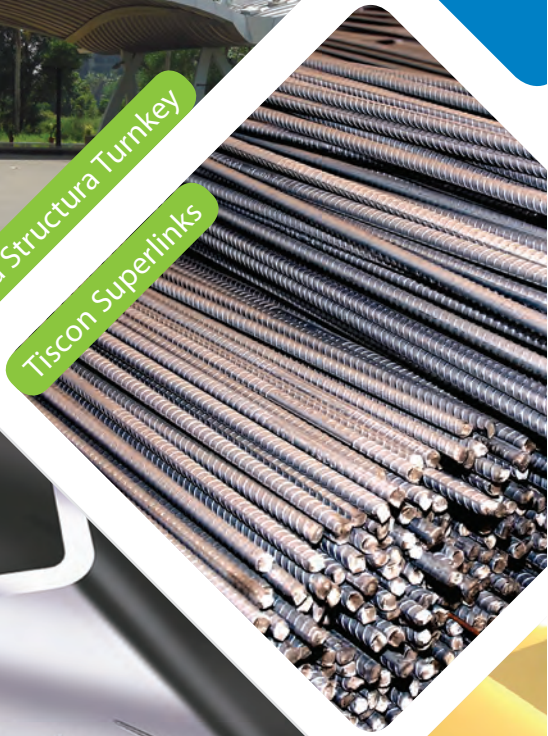
Nest-In



Tata Structura Turnkey



Tiscon Footings



Tiscon Superlinks



Tata Structura Fabrications



Tata Structura Studio



Roof Junction



Steel n Style



Praveesh Doors



Tata Shaktee Ridge

Jharkhand - Jamshedpur

# THE STORY OF THE CITY OF STEEL

Along with the key business of steel making, Tata Steel's Jamshedpur facility has always been a showcase for community initiatives. As Tata Steel's first factory came up, streets were built around it, schools were established, hospitals set up and parks created. Today, the Tata Steel factory at the heart of Jamshedpur continues to be the heart and soul of the city.

Tata Steel founded India's first industrial city, now Jamshedpur, where it established the country's first integrated steel plant in 1907. The Jamshedpur Works facility currently comprises a ~11 MTPA crude steel production facility and a variety of finishing mills. Mines and collieries in India give the company a distinct advantage in raw material sourcing. Looking into the future, the company plans to continue to increase its capacity significantly through both Brownfield and Greenfield developments.



▼ A view of the Tata Steel Jamshedpur steel plant



Blast Furnaces  
in Jamshedpur achieved  
the best-ever coke rate and  
highest best-ever coal rate  
(Indian Benchmark) in  
FY 2015-16.

Jharkhand - Jamshedpur

# ENHANCING CAPACITIES. DEVELOPING SOLUTIONS.

Tata Steel has the distinction of being one of the lowest cost producers of steel in India. Capacity expansion at Jamshedpur has been an important growth project and will help strengthen the product portfolio in India while rebalancing steelmaking capacities across the group.

## Main products manufactured at Jamshedpur:

1 Hot rolled coil

4 Rebars

2 Cold rolled coil

5 Galvanised coil

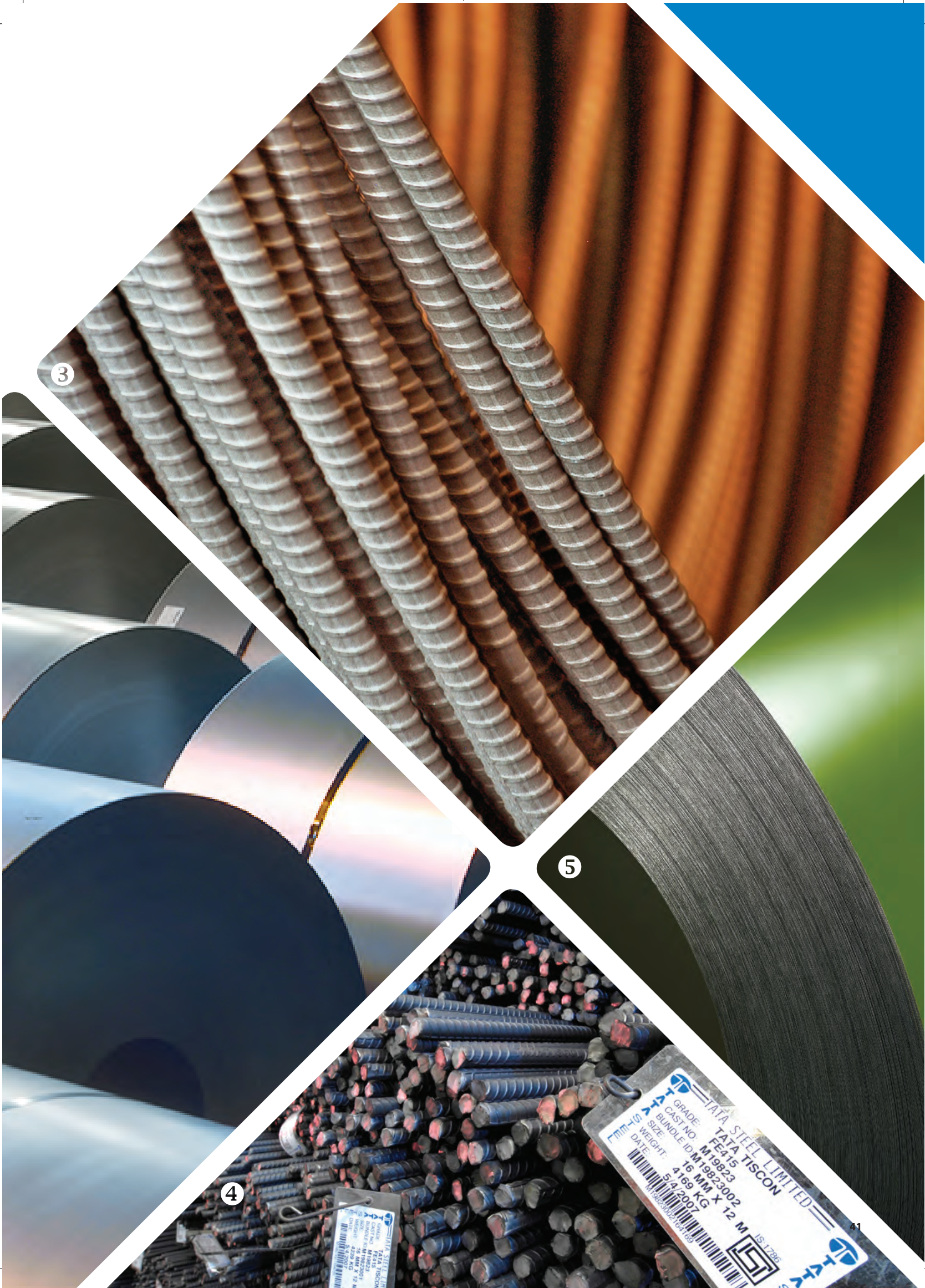
3 Wire rods

### STRATEGIC BUSINESS UNITS:

- » Agrico Division
- » Tubes Division
- » Wiron Division
- » Tata Growth Shop
- » Bearings
- » Industrial By-products Management
- » Ferro Alloys Minerals Divisions (FAMD)

### SUBSIDIARY COMPANIES IN JAMSHEDPUR:

- » Indian Steel & Wire Products Limited (ISWP)
- » Jamipol
- » Tata BlueScope Steel
- » The Tinplate Company of India Limited (TCIL)
- » Tata Pigments
- » Jamshedpur Continuous Annealing and Processing Company Private Limited (JCAPCL)
- » Tata Metaliks Limited



3

4

5

# DRIVING PROFITABILITY. ENABLING SUSTAINABILITY.

In every large corporate, there are a few flagship operations that lead the way in profitability and efficiency. There are also smaller operations that add to the organisation's growth. Here are some of the lesser known, but important, performers for Tata Steel.



## Tata Agrico

**Key product:** Quality agricultural implements

Tata Agrico, is a leading manufacturer of handheld implements like hoes, shovels, sickles, crowbars, pickaxes and hammers. These implements cater to the needs of agriculture, infrastructure as well as mining sectors.

## Tata Wiron

**Key product:** Steel wire

Tata Steel Global Wires (TSGW) has a combined annual manufacturing capacity of 670,000 MT of steel wires. It employs over 2,000 people worldwide and caters to various industry segments such as automobile, infrastructure, power and general engineering.



## IBMD

### Key product: Steel by-products and scrap

Industrial By-products Management Division (IBMD) handles approximately 13 MnT of by-products generated throughout the value chain right from raw material to finished goods. The division focusses on the 3R philosophy - Reduce, Recycle and Reuse.



## Tata Growth Shop

### Key product: Design and manufacture of heavy machinery and equipment

Tata Steel Growth Shop (TGS) is one of the largest designer and manufacturer of plants and equipment in India. The plant has general engineering, manufacturing, fabrication, machining and heat-treatment facilities.

## Ferro Alloys and Minerals Division (FAMD)

### Key product: High Carbon Ferro Chrome

Commencing with mining, beneficiation, production and sales of Ferro Alloys and minerals across the globe, FAMD is the sixth-largest high carbon Ferro Chrome producer in the world, with a domestic market share of 25% and global market share of 5%.



## Tata Bearings

### Key product: A wide range of bearings

Tata Bearings, the fifth largest bearings manufacturer in India, produces customised solutions including Taper Roller Bearings, Clutch Release Bearings and Magneto Bearings. The brand has introduced 1st generation Hub Bearings for 4-wheeler application.



## Tubes Division

### Key product: Tubes

Leading Tubes producer in India, it manufactures and markets a wide range of steel pipes. It is the only tube manufacturer with a pan-Indian presence in three product segments - structural, precision and conveyance. It is the domestic market leader in Conveyance and Structural tubes with a significant national presence in Precision tubes catering to Automotive and Engineering segment.



▶ Hot Strip Mill in Kalinganagar plant

Odisha - Kalinganagar

# REALISING A DREAM

Conforming to Tata Steel's vision of Value Creation and Corporate Citizenship and its commitment to nation-building while strengthening its partnership with the east-Indian state of Odisha, Tata Steel initiated an integrated steel-plant with an annual capacity of 6 million tonnes per annum in Kalinganagar Industrial Complex.

The plant commenced commercial production with its first phase of 3 MTPA on May 25, 2016 and is now known as Tata Steel Kalinganagar.

This is Tata Steel's first Greenfield project in Odisha and the second phase is in the pipeline. The Company also possesses and operates captive iron ore mines in Joda and Khondbond, and a ferro-alloys and mineral division in Sukinda, in the state of Odisha.

New technologies such as Granshot system & CAS-OB have been introduced for economical and eco-friendly steel-making.



▲ Tata Steel Kalinganagar plant view

Odisha - Gopalpur

# EXPANDING PRESENCE. AUGMENTING CAPACITY.

Expanding the key horizons and acting as partners for the progress and development of the state of Odisha, the focus has been on the opening of an Industrial Park along with venturing into different business segments.

The Gopalpur plant employs world-class technology and automated systems to ensure smooth operations.

The company is in the process of developing a multi-modal Industrial Park in Gopalpur and is investing in an operational ferro-chrome plant. The Industrial Park is being developed by Tata Steel Special Economic Zone Ltd, a 100% subsidiary of Tata Steel.

The Industrial Park will primarily attract investments in steel and allied downstream industries, engineering, chemicals and other emerging sectors.

As part of the anchor investment in Tata Steel's Gopalpur Industrial Park, the ₹ 542 crore Ferro-chrome plant has an installed capacity of 55,000 tonnes per annum (TPA). The plant was inaugurated on November 30, 2016.

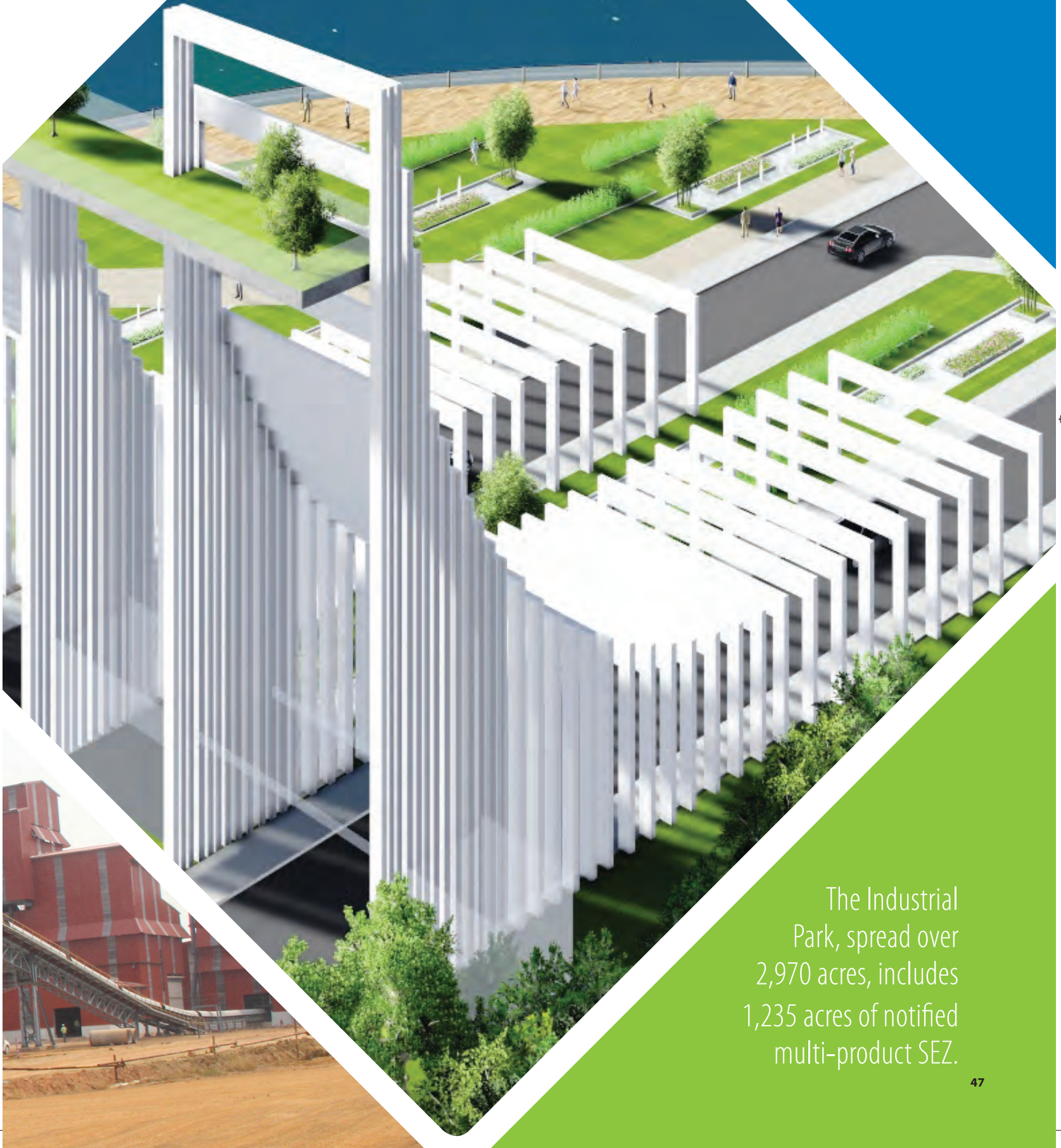
▼ The briquetting plant at Gopalpur





▼ *Concept entry gate of the Gopalpur Industrial Park*

The briquetting plant, a plant of the Ferro-chrome plant, is fully-mechanised and has the unique feature of a blending ore facility.



The Industrial Park, spread over 2,970 acres, includes 1,235 acres of notified multi-product SEZ.

Europe

# DISTINCT PRODUCTS. OPTIMISED PROCESSES.

Balancing economic prosperity, environmental responsibility and social benefit, Tata Steel Europe aims to address larger global challenges through its advanced steel products and efficient production processes.

Tata Steel is the **second largest** steel producer in **Europe** with a **diversified presence** across the continent.

It has a crude steel production capacity of over 12.3 MTPA in Europe – more than two thirds of the Group's total capacity.

▼ A view of the Tata Steel Ijmuiden plant at the Netherlands



**TATA STEEL EUROPE  
STEEL MAKING SITES**

**IJMUIDEN**

- » Slab
- » Hot and
- » Cold rolled
- » Coil
- » Coated strip products (galvanised)

**PORT TALBOT**

- » Slab
- » Hot and
- » Cold rolled
- » Galvanised Coil

**OTHER FACILITIES**

- » Special steels
- » Ultra-pure re-melted steels
- » Various rolling and coating lines

Europe

# FORGING PARTNERSHIPS. BUILDING CAPACITY.

A strong presence across Europe and a diverse product portfolio catering to the various market segments puts Tata Steel Europe in a strong position in the steel arena.

## IJmuiden Works, The Netherlands

Apart from the steelmaking facility at IJmuiden, Tata Steel has five manufacturing locations and two distribution centres in the Netherlands. There are 15 manufacturing locations and nine distribution centres in the rest of Europe.

IJmuiden is currently the Group's largest steel making unit with a crude steel production capacity of 7.7 MTPA. It is known for producing high-quality steel for various applications. It is mainly used in the automotive, construction and packaging industries. The material is also used in batteries, tubes, industrial vehicles and white goods such as refrigerators and stoves.

## Port Talbot, Wales

The plant has a rich iron-making history and is part of the Strip Product UK business of Tata Steel. With a capacity of 4.6 MTPA, this integrated steel production plant, is one of the largest in Europe.

## Downstream Products Units

Tata Steel Europe has additional manufacturing operations in Germany, France, Sweden, Turkey, Spain and the USA. This manufacturing capability in combination with a wide service and distribution network enables the Group to grow and support its businesses worldwide.

30% of Tata Steel UK's sales by revenue comes from the construction sector.

Tata Steel's Tubes business in Europe is a leading supplier of hot finished and cold formed steel tubular products.

Tata Steel UK supplies almost 50% of the steel requirements of UK's carmakers.



Employee monitors the rolling process of coil at IJmuiden plant, The Netherlands

IJmuiden



Hisarna pilot plant at IJmuiden converts iron-ore fines and coal directly into liquid iron

A new high-tech robotic welding line - the largest in the UK - has been introduced at the Automotive Service Centre in West Midlands.



Employee controlling the plant operations through automated systems

Europe

# DRIVING QUALITY. ENSURING SATISFACTION.

Tata Steel Europe's product range and service offerings satisfy the quality and performance needs of a wide variety of demanding markets and applications.

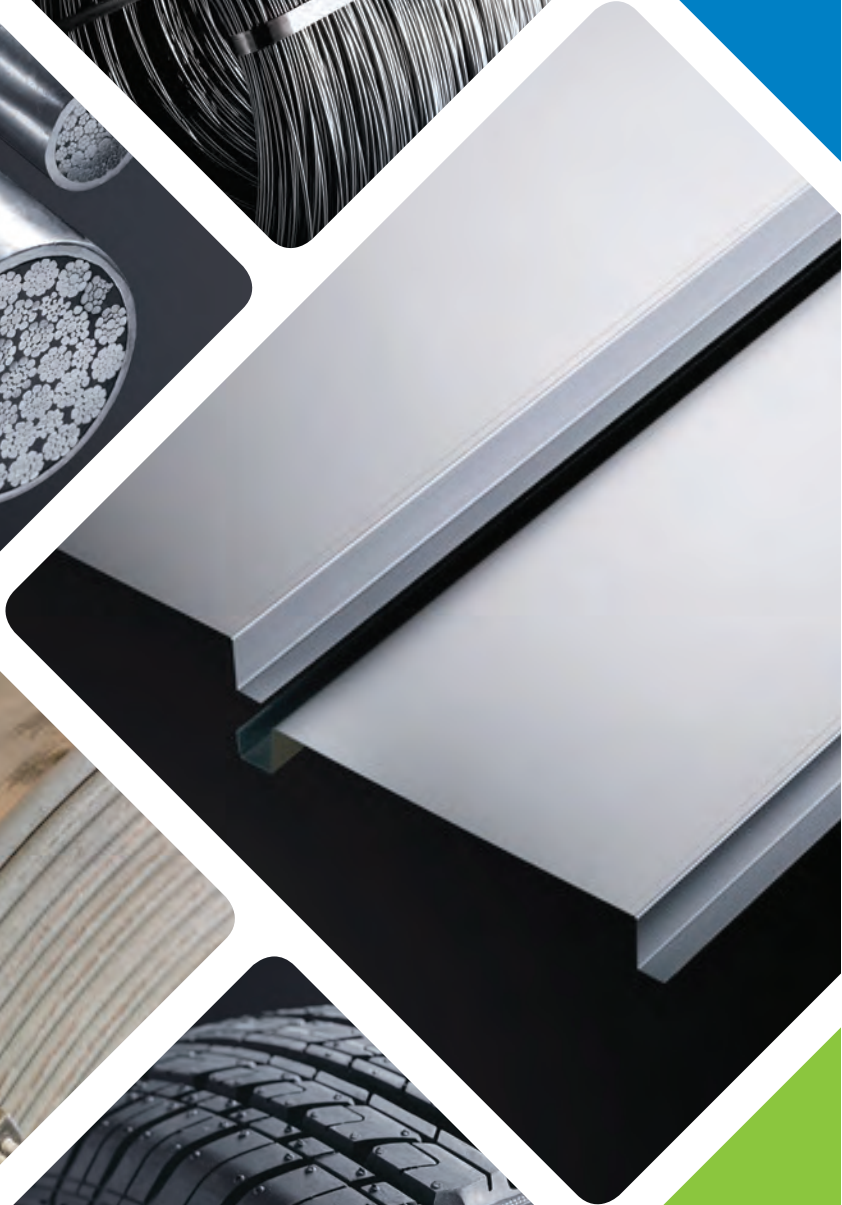
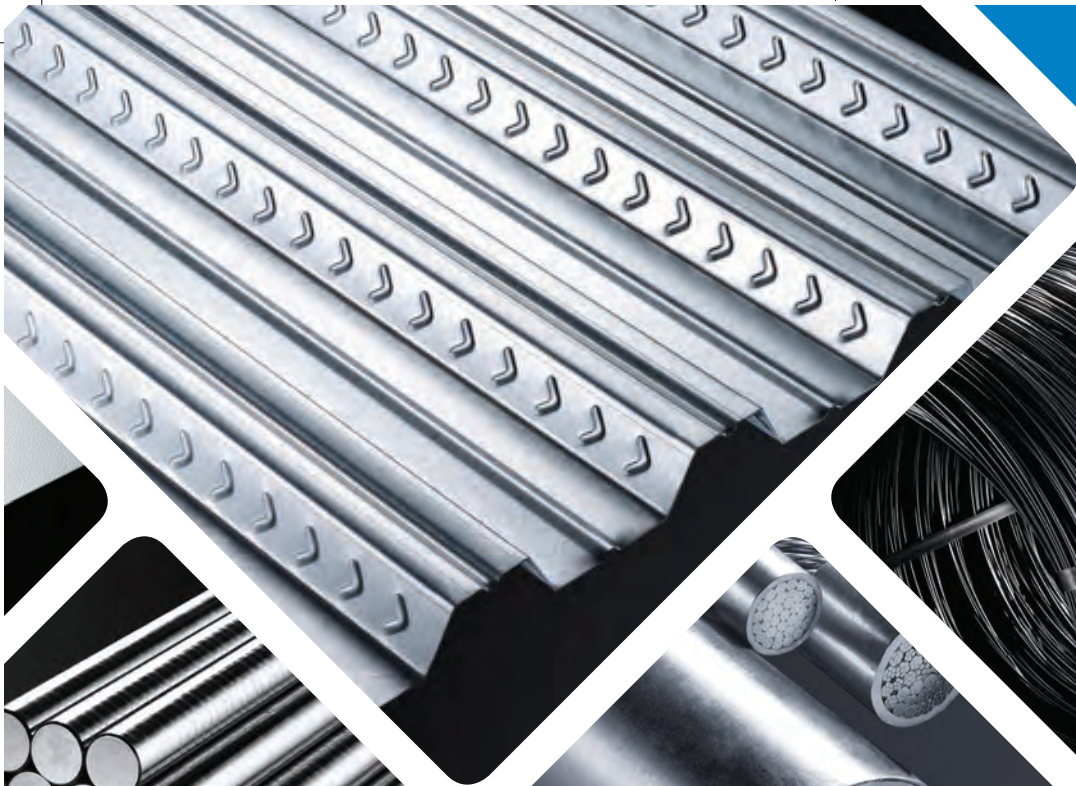
## Products and Services

Flat	Solutions	Services
Hot-rolled	Building envelope	Service centres
Direct-rolled	Structural	Consulting
Cold-rolled	Fit-out	Records management
Metallic coated	Foundations	
Pre-finished steel	Highway engineering	
Packaging steel		
Electro-plated steel		
Electrical steels		
Narrow strip		

With a focus towards achieving the highest benchmarks of performance, Tata Steel in Europe has innovated products to meet changing customer needs.

Nearly all the 1p, 2p, 5p and 10p coins in circulation in the UK are made from steel manufactured at the Port Talbot plant.





► Employee checks the characteristics of hot rolled coil



South East Asia

# GROWTH THROUGH DIFFERENTIATION

Tata Steel's operations in South East Asia began in 2004 with the acquisition of NatSteel, Singapore, the operations of which is run by NatSteel Holdings Pte Ltd., a wholly-owned subsidiary of Tata Steel. Subsequently, Tata Steel acquired a majority stake in the Thailand-based steelmaker Millennium Steel in 2005, which strengthened the company's South-East Asian operations.

## NatSteel Singapore

It is the market-leader in construction steel with over 40% market share in the country. With a capacity of around 0.75 MTPA, the plant also has one of the world's largest single downstream rebar fabrication operations. With a focus on recycling, the plant consumes over 75% of the scrap produced in the city. NatSteel is the only steel company in Singapore with integrated upstream and downstream operations. The annual production of NatSteel was 1.35 MnT and the annual turnover was \$670.16 MN in FY 2016.

## Tata Steel Thailand

It is the largest producer and distributor of long steel products in Thailand. It has a rolling (finished goods) capacity of 1.4 MTPA. While the majority of steel produced by Tata Steel Thailand is consumed by the domestic market, over 10% is exported. In FY 2016, the annual production was 1.3 MnT and the turnover amounted to \$ 580.29 MN.



▼ Pan view of NatSteel Singapore

Tata Steel Thailand operates as a holding company with shareholding in 3 subsidiaries.

South East Asia

# VALUE-ADDED PRODUCTS. VALUE CREATING PROCESSES.

With a continued focus on adding value to products by following a strategy of providing holistic solutions, Tata Steel's South East Asia operations are meeting the requirements of its customers.

In SEA, Tata Steel plans to concentrate its efforts in growing its value-added products and services portfolio throughout the region while strengthening its key steel operations in Singapore, Thailand and China.

## NatSteel Singapore product range

- ◆ Reinforcement Bars (Rebars) & Wire Rods
- ◆ Cut-and-bend Reinforcement Bars
- ◆ Welded Wire Mesh
- ◆ Prefabricated Cages (Pre-cages)
- ◆ Steel Couplers
- ◆ Carpet Reinforcement



## Tata Steel Thailand product range

- ★ Rebar
- ★ Seismic Bar
- ★ Cut and Bend
- ★ Small Section
- ★ Wire Rods
- ★ Special Wire Rods
- ★ Special Bar Quality (SBQ)

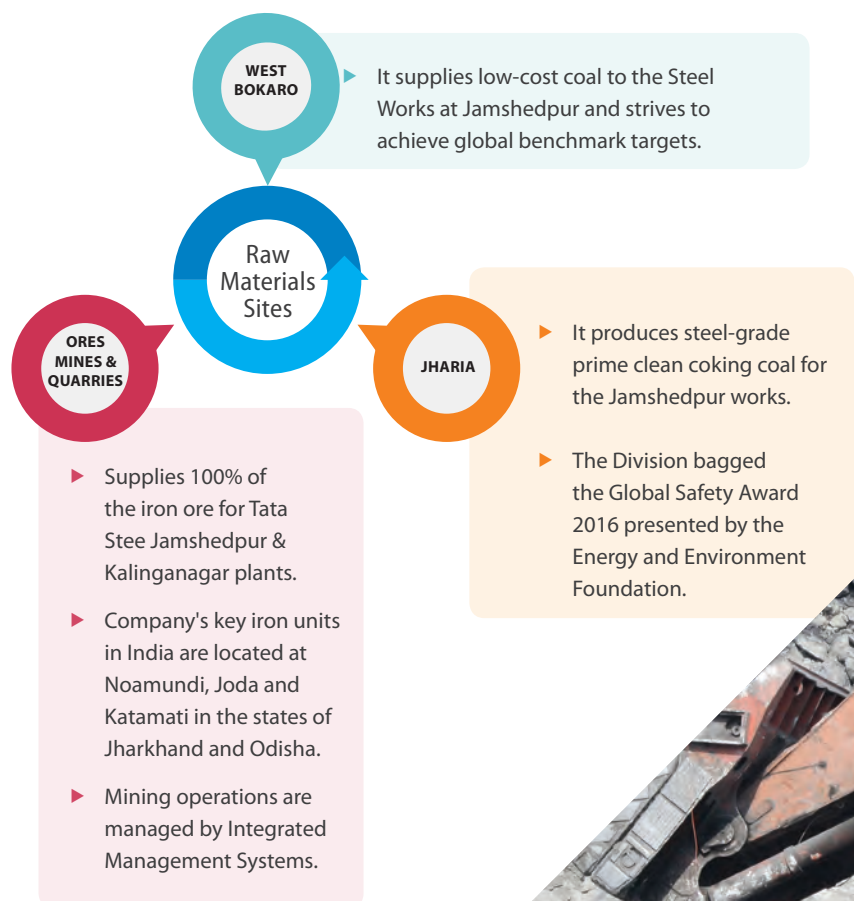


Raw Materials

# ENABLING RAW MATERIAL

The presence of captive mines help in maintaining cost-competitiveness and production efficiencies through an uninterrupted raw material supply.

Tata Steel's manufacturing strategy has always been focussed on ensuring raw material security. This goes a long way in enabling cost competitiveness and efficiencies. Towards this end, Tata Steel has put into place several initiatives.



► Coal mining at Jamadoba mines in Jharkhand are executed with efficient machinery





▲ Iron-ore fines under-going cleaning process at Noamundi mines, Jharkhand

Raw Materials

# SUSTAINABLE MINING

Tata Steel is committed to ensuring sustainable mining through its operations. Certified with the highest international standards, the Company ensures raw material efficiency and conservation through advanced technologies.

### Enhancing Canada's iron ore production

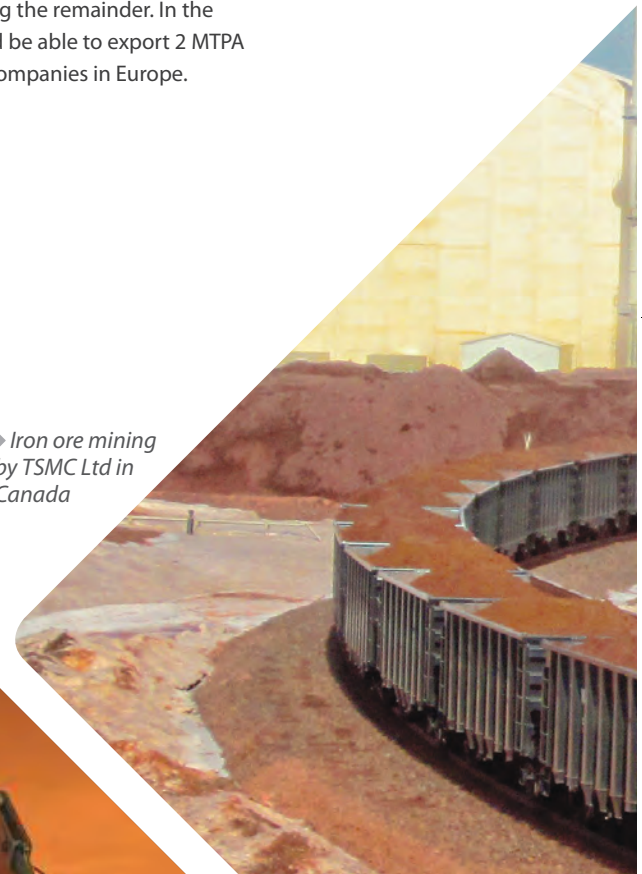
Tata Steel Minerals Canada Ltd (TSMC) is a joint venture between Tata Steel (94% holding) and New Millennium Iron Corp (6% holding) — A Fortune 500 company and among the top producers of steel in the world. TSMC's iron ore mining units are located in Quebec, Newfoundland and Labrador in Canada.

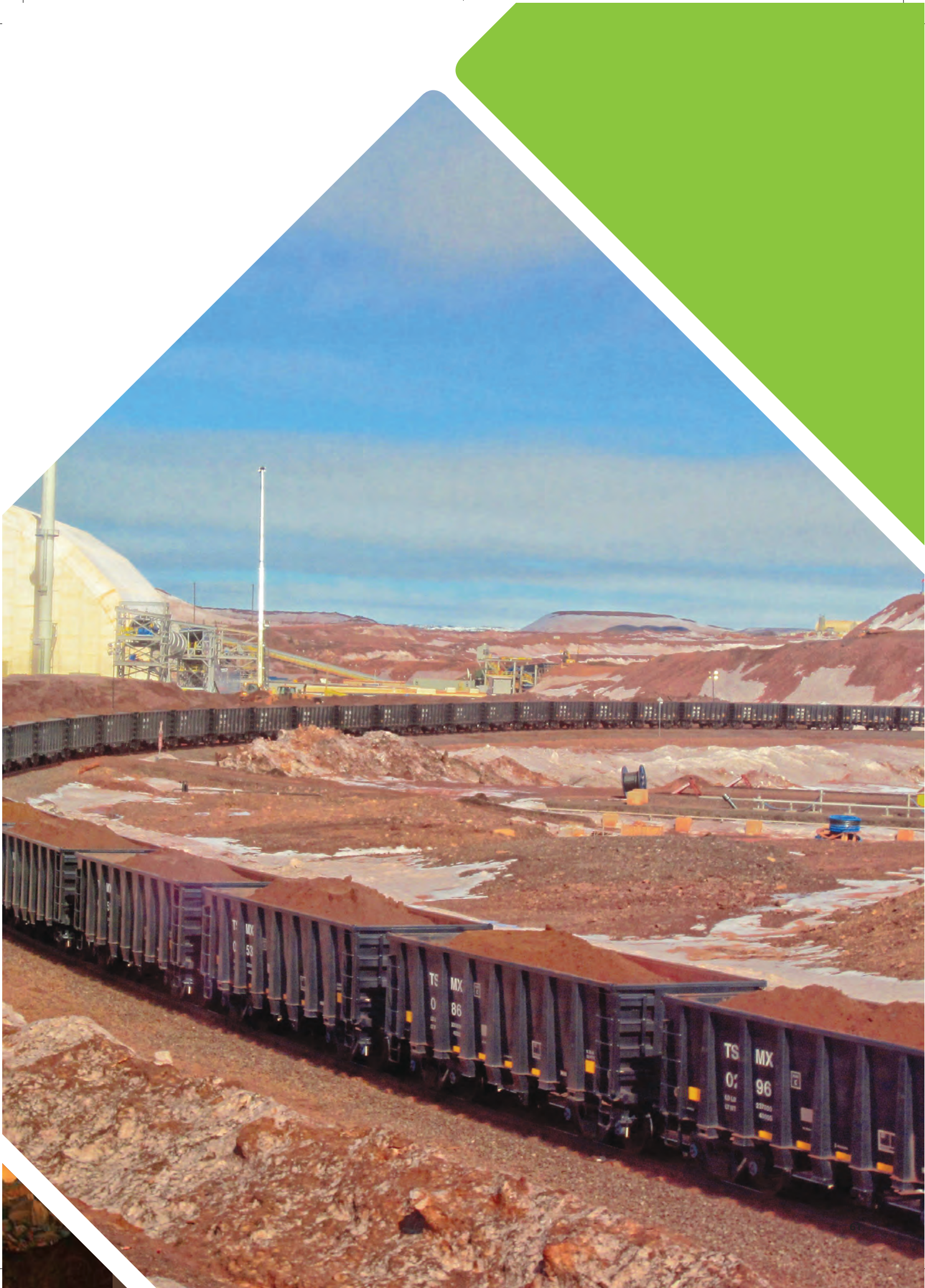
### Ensuring iron ore supply in South Africa

The Sedibeng iron ore facility in South Africa is 64% owned by Tata Steel with the Industrial Development Corp. and Cape Gannet holding the remainder. In the coming years, the mine should be able to export 2 MTPA of iron ore to the Tata Group companies in Europe.

Current production rate of iron ore mines at Noamundi, Katamati, Joda & Khondbond is 20 MTPA (fines and lumps)

► Iron ore mining by TSMC Ltd in Canada



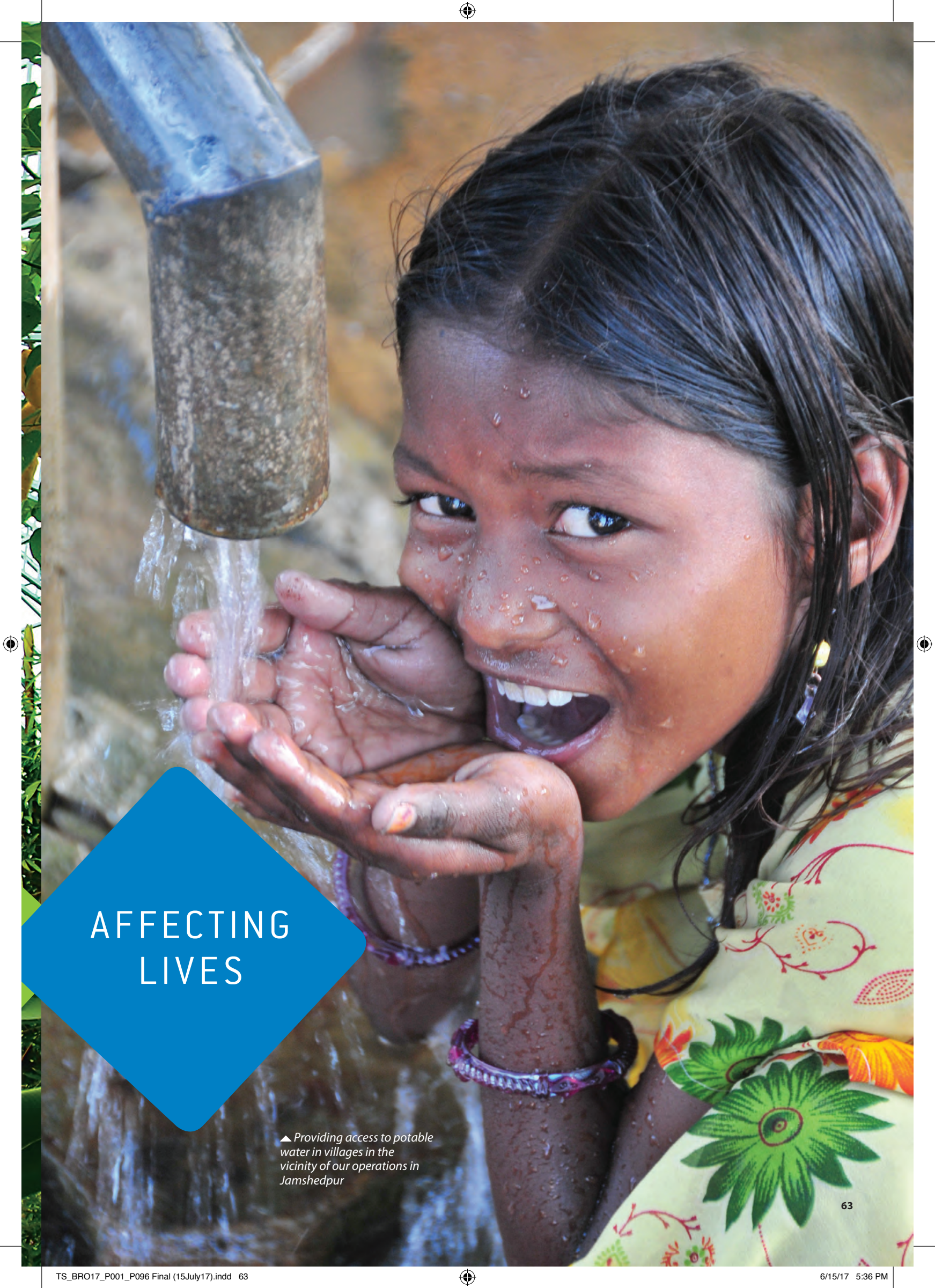


# THE BIGGER PICTURE

EFFECTING CHANGE

▲ Butterfly park, Bengaluru, India, created with Tata Structura





# AFFECTING LIVES

▲ Providing access to potable water in villages in the vicinity of our operations in Jamshedpur

# PARTNERING SOCIETY

In line with our founder's philosophy of business enterprise being the vehicle of social upliftment, all Tata Steel group companies embody social responsibility in their vision.

► *Women from displaced families are empowered through vocational training programs including tailoring at Kalinganagar*



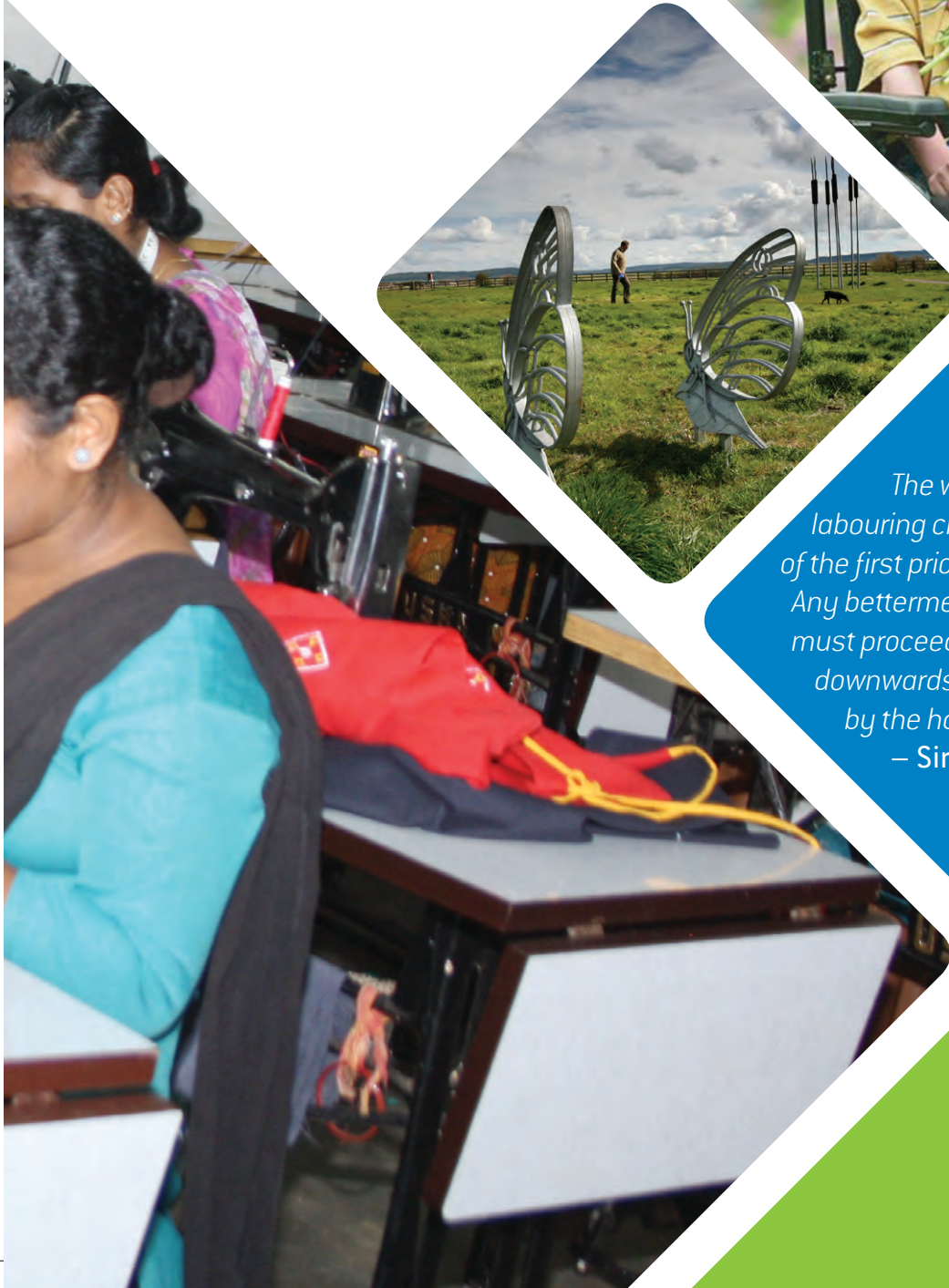
Tata Steel's community-centric initiatives are directed towards the spread of quality education, healthcare and sustainable livelihood opportunities. This is done through agriculture development as well as market linkages, skill development of youth, promoting entrepreneurship and preservation of ethnicity and culture of indigenous communities.

This focus is evident in all its global operations. Balancing economic prosperity, environmental responsibility and social benefit, Tata Steel Europe is committed to ensuring zero harm to its employees, contractors and the communities in which it operates. Tata Steel UK's Community Partnership Programme is themed 'Future Generations', with sub-themes of education, environment, health and wellbeing.

UK Steel Enterprise, a subsidiary of Tata Steel, works across the UK, assisting job and wealth creation by supporting small and medium businesses with finance and business premises. Similar interventions are run across the Company's Europe operations, especially in the Netherlands.

In India, Tata Steel is a partner in progress with Odisha, and believes in taking its stakeholders forward in its journey of growth.

Tata Steel Thailand is one of the first 30 companies that joined UNICEF in Child Friendly Business in "The Children Sustainability Forum" to make a commitment in protecting children's rights.



“  
The welfare of the  
labouring classes must be one  
of the first priorities of the employer.  
Any betterment of their conditions  
must proceed from the employers  
downwards, than be forced up  
by the hands from below.  
– Sir Dorabji Tata  
”

1.1 million lives  
positively impacted  
in 2017 (Include this  
information)

Skill Development

# CREATING LIVELIHOOD OPPORTUNITIES


Developing skills in youth is tantamount to giving them opportunities for lifelong livelihood. For Tata Steel, skill development remains an area of tremendous focus.

The lack of employable skills deprives scores of youth from gainful employment opportunities. Tata Steel facilitates skill development training for unemployed youth in diverse fields such as construction, automobiles, motor driving, voice services, hospitality, apparel designing, nursing, etc. Through such focussed interventions, hundreds of youth have become skilled workers and are pursuing careers in different organisations across the country.


Project Samriddhi is a skill development intervention for girls living in conflict areas. Given financial support,

many pursue diploma courses in nursing, midwifery – finding employment in hospitals and clinics.

In Thailand, the Company has worked closely with local communities to improve their quality of life through various projects such as Accounting and Social Network training courses to developing local businesses. With the Company encouraging employee's to volunteer in social development causes, over 93% of Tata Steel Thailand employees participated in at least one CSR activity in 2015-16.



▲ Women in villages are empowered through vocational training in various fields including 'saura' painting



▶ Skill development programmes for youth empowerment and income generation is provided by Tata Steel

Over 93% of Tata Steel Thailand employees participated in CSR activities in 2015-16.

▼ Training programmes to help the youth improve their communication skills



Healthcare

# TOWARDS A HEALTHIER SOCIETY

Tata Steel has been partnering with governments and independent organisations to work towards improving the overall health and hygiene of the communities in which it operates.

In a public-private partnership mode with the government health system and not-for-profit organisations working in health, Tata Steel is implementing its Maternal and Newborn Survival Initiative (MANSI) Project in 167 villages of the Seraikela-Kharsawan district in Jharkhand. This initiative has reduced the neonatal mortality rate by 46% and infant mortality rate by 39%.



► Regular health-camps are organised for villagers in our operational areas



Youth Empowerment

# EMPOWERING YOUTH THROUGH SPORT

Recognising that imbining a culture of sport does much for the state of mind of the youth, Tata Steel has placed a lot emphasis on this aspect for decades now.

Community sports is one of the key strategies to empower youth in the hinterlands. It also helps identify and nurture talent among rural communities. By channelising the energy of youth into sport, Tata Steel has organised numerous community football, archery and athletics tournaments. More than 30,000 youth participate in these sporting events.

In addition to sport, Tata Steel also organises leadership training programmes to nurture and groom youngsters into taking responsible positions at work.

► Tata Steel has instituted academies in India to train the youth in sports such as archery and football

Tata Steel Netherlands organises the Tata Steel Chess Tournament, bringing together grandmasters and amateurs from across the world.





Tata Steel UK is a community partner of the British Triathlon.



Education

# LIGHTING UP LIVES WITH EDUCATION

Tata Steel's interventions in the field of education span the entire cycle of schooling—from elementary to high school.

'The Thousand Schools Project' in Odisha is focussed on improving the standard of education in government schools thereby impacting thousands of children. This flagship education project intends to make the Right to Education (RTE) Act a reality.

In 2015-16, nearly 2,000 children were brought back to formal schooling through Bridge Courses, while 4,547 children were brought back through direct enrolment.

Scholarships like the Jyoti and Moodie Fellowships and Tata Steel Scholar are examples of the initiatives to financially help meritorious students from poor families. By availing these, students can pursue school and college education and further their career aspirations.

Another effective initiative, Project Aakanksha is empowering the children of Jharkhand's Particularly Vulnerable Tribal Groups (PVTGs) residential education. The project intends to bring about education-positive changes in the mindset of these children, so that they can emerge stronger and are confident to face the world.

In Thailand, the Company's flagship program me of 'Grow Smart with Tata Steel' to support studying of students in the Government Schools in remote area at the end of FY16 has reached 222 schools (including 3 mobile libraries) in 45 provinces across the country.

Tata Steel Europe conducts initiatives like the Crucial Crew Interactive Learning Day that benefits thousands of children.

Tata Steel India started the 'Grow Smart with Tata Steel' programme to support government school students.

Tata Steel Thailand has set up initiatives like Brain Base Learning to help improve quality of life.





▲ Emphasising on the holistic development of kids, Tata Steel Europe organises Kids of Steel annually

Culture and Ethnicity

# PRESERVING CULTURES, CELEBRATING DIVERSITY.

Tata Steel consistently endeavours to preserve and promote tribal culture and heritage by running tribal language centres, curating tribal literature, teaching tribal musical instruments and documentaries on tribal heroes.

► Proactive effort in preserving and promoting tribal culture through a multitude of events and workshops

Tribal languages and literature are the very essence of the tribes' identity and culture. In Jharkhand, the Santal and Ho tribes account for a sizeable tribal population. Ol-Chiki and WarangKshiti are the scripts of the Santali and Ho languages, respectively. As part of its effort to promote tribal languages, especially among the new generation, Tata Steel's Tribal Cultural Society has been running language learning centres with candidates enrolling to learn the language and script.

Striving to restore the glorious past of traditional tribal instruments, Tata Steel's Tribal Cultural Society has undertaken a number of initiatives. From organising classes to teach how to play indigenous and endangered tribal instruments such as the Banam and Mandar to holding programmes on tribal music.

In Canada, an MOU has been signed between TSMC and First Nation Human Resources Development Commission of Quebec for capacity building of aboriginal peoples.



▼ MOU signed between TSMC and First Nation HR



MINISTERS OF INDUSTRY AND TRADE  
MINISTERS OF NATURAL RESOURCES  
MINISTERS OF ENERGY

TOWARDS CAPACITY

PROTOCOL

Mining Essential

31 AUGUST

COMMISSION DE  
DEVELOPPEMENT DES  
TERRITOIRES  
INDIENS  
DU QUÉBEC



FIRST NATIONS  
HUMAN RESOURCES  
DEVELOPMENT COMMISSION  
OF QUEBEC



# PILLARS OF SUSTAINABILITY



PROMOTING  
DIVERSITY



ENSURING  
SUSTAINABILITY



Environment

# STAYING GREEN

Tata Steel has always been committed to conservation of natural resources, preservation of bio-diversity and the abatement of climate change impact. Our aspiration is to be the 'Indian Steel industry benchmark in Environment Performance'!

Tata Steel is committed to playing a constructive role in addressing climate change – both by reducing its own carbon footprint, and by creating high performance steels that make it possible to produce fuel efficient vehicles and energy-efficient buildings. Additionally, it is also investing in several initiatives like waste heat recovery, zero-effluent discharge, solid waste utilisation and biodiversity management. Creating forest areas, planting trees, setting up eco-parks are some other initiatives towards this end.

Environmental  
Management Systems  
meet the ISO 14001  
standards at all main  
manufacturing sites.







▲ Lush park in Jamadoba township in Jharia

Safety & Health

# SAFETY FIRST IS SAFETY ALWAYS

All of Tata Steel's operations target towards the goal of "Committed to Zero" for any unsafe practice. And a lot of time is invested in ensuring that all activities follow this tenet.

The Tata Steel Health and Safety Policy is the foundation for driving the safety journey. A robust management system frame work and a sound safety governance structure drives the policy. To achieve the corporate objective of 'Committed to zero LTI (Loss Time Injury)', six long term safety strategies have been prioritised and are being implemented through apex safety sub-committees across the organisation. The progress is monitored and reviewed at different levels.

## The 6 Safety Strategies

1. Build (Safety) leadership capability from senior leaders to front line supervisors.
2. Develop the competency and capability of all employees to proactively identify hazards and manage risks to prevent safety incidents.
3. Ensure contractor safety risk management.
4. Ensure Road and Rail safety risk management.
5. Process Safety Management, integrated emergency response, infrastructure integrity management
6. Occupational Health/Industrial Hygiene (OH/IH)

Recognition for Tata Steel's unrelenting efforts in this space, have come from the Greentech Safety Awards. Tata Steel's Manganese mines and FAP Joda have been winners of the gold category for the past three years since 2014.

## Multiple programmes across Europe include:

- The Zero Harm initiative – to raise awareness on key health and safety topics including campaigns on noise and asbestos
- The Sir Gar Project at Trostre site in Wales – a pioneering cardiovascular screening project
- Structural measures to reduce and prevent exposure to emissions of diesel engines in enclosed areas

## Safety Initiatives by Tata Steel Operations in SEA:

NatSteel has undertaken several aggressive measures in this area that are showing results. Among these are:

- Partnering government agencies and partners to improve safety in construction industry

## Safety Achievements:

- bizSAFE Partner since 2009
- World Steel Safety & Health Recognition 2011 & 2012
- Workplace Safety & Health Council (WSHC) Innovation Award 2011
- ISO14001 & OSHAS18001 Accreditations

## Achievements in Safety by Tata Steel Thailand Government:

- Safety Award 2015, 'Excellence' class from Labour Protection and Welfare Department
- Green Mining Award 2015 from Department of Primary Industries and Mines (DPIM), Ministry of Industry
- NatSteel Singapore surpassed 4 years of zero loss time injury in March 2016



Innovation

# CREATING CUSTOMER-CENTRIC SOLUTIONS

Tata Steel is an innovation-driven company that combines a personal service for customers with a creative flair for developing new ideas.

Tata Steel works closely with customers and is committed to investing in long-term business relationships to help develop new products and technologies.

The Research & Development (R&D) business of Tata Steel combines top-class innovation with cutting-edge technology to deliver metals solutions in a constantly changing world.

Tata Steel's customers get the support they need to enable them to design new products and applications. Employing almost 1,000 researchers across India, Britain, and the Netherlands, Tata Steel supplies metal solutions to Tata Steel sites around the world.

Tata Steel works in collaboration with universities and research institutes all over the world as well as with key customers in the automotive, transport, packaging and construction areas. Over the years, R&D has developed several grades of special steels.

In SEA, Tata Steel is committed to reduce volumes of imported wire rod and energy and power consumption. In this region, Tata Steel is also looking for new products that can add value to the construction industry, such as carpet reinforcement.

► *International Automotive Research Centre at University of Warwick enables Tata Steel to conduct research on innovation and new developments*



People Practices

# EMPLOYEE FIRST

Contributing positively to the quality of life of the people and communities is fundamental to Tata Steel's approach to business. From its very inception, Tata Steel has been a showcase for worker welfare schemes and community initiatives.

Today, the Human Resource Management function is a strategic partner in business. It has, over the decades, implemented trendsetting policies, the most recent being the first in the manufacturing industry to have a 5-day work-week and being declared as the Best Place to Work in the Core sector in the Business Today, India Survey.

Besides paternal leave, work from home and extended maternal leave, other initiatives include Mosaic-a diversity and inclusion campaign that emphasises meritocracy, gender diversity, creates friendly infrastructure for differently-abled employees and seek to increase the number of women in senior leadership.

### A culture of mutual trust and transparency

The European Works Council meets on a regular basis to provide a forum for discussion of significant issues which may affect employees. Tata Steel has signed on with the UK Government's Social Mobility Business Compact, which aims to ensure everyone has a fair opportunity to fulfill his or her potential according to merit.

### Adherence to the highest governance standards

In the SEA region too, there is a continual emphasis on human rights. Several initiatives in NatSteel have been undertaken-like the adoption of best practices, annual satisfaction survey for migrant workers, ensuring good living conditions, health management workshops, HIV awareness talks, weight management programmes, smoking cessation programmes, aerobic classes among others.

Tata Steel Thailand enhanced the human resource management in various areas such as orientation and mentoring for new joinees; welfare and benefits improvements with the TOGETHER Programme; feedback initiatives from the Labour union, Employee Committee, Welfare Committee, etc., to improve

remuneration and facilities; knowledge sharing session by build workforce capability; and a continuous emphasis on feel-good initiatives to keep morale high.

### Tata Steel has won several global awards

- ★ Significant Achievement in Employee Relations by Employees Federation of India in 2015
- ★ One of the Top 25 best companies to work for in India by Thomson Reuters in 2016
- ★ Special Recognition Award in Manufacturing sector in India by Randstand in 2015 as the most attractive employer





# GROUP COMPANIES OVERVIEW

DRIVING  
EFFICIENCY





DELIVERING  
IMPACT

# A SNAPSHOT OF GROUP COMPANIES

The Tata Steel group has spawned several companies that are leaders in their sphere of operations.

Sr. No.	Name of Company	Holding type	Holding (%)
1	Jamshedpur Utilities & Services Company Limited	Subsidiary	100.00%
2	The Tata Pigments Limited	Subsidiary	100.00%
3	T S Alloys Limited	Subsidiary	100.00%
4	Tata Steel Processing and Distribution Limited	Subsidiary	100.00%
5	Adityapur Toll Bridge Company Limited	Subsidiary	88.50%
6	The Tinplate Company of India Limited	Subsidiary	74.96%
7	Tayo Rolls Limited	Subsidiary	54.91%
8	Tata Sponge Iron Limited	Subsidiary	54.50%
9	Jamshedpur Continuous Annealing and Processing Co Pvt Ltd	Subsidiary	51.00%
10	TM International Logistics Limited	Subsidiary	51.00%
11	Tata Metaliks Limited	Subsidiary	50.09%
12	Mjunction services Limited	Joint Venture	50.00%
13	S & T Mining Company Private Limited	Joint Venture	50.00%
14	Tata BlueScope Steel Limited	Joint Venture	50.00%
15	Tata NYK Shipping Pte Limited	Joint Venture	50.00%
16	Bhubaneshwar Power Private Limited	Joint Venture	26.00%
17	Himalaya Steel Mills Services Private Limited	Joint Venture	26.00%
18	Jamipol Limited	Associate	39.78%
19	TRL Krosaki Refractories Limited	Associate	26.62%
20	Industrial Energy Limited	Associate	26.00%
21	Medica TS Hospital Private Limited	Associate	26.00%
22	Nicco Jubilee Park Limited	Associate	25.31%

## JUSCO (Jamshedpur Utilities and Services Company Limited)

[www.juscoindia.com](http://www.juscoindia.com)

# IMPROVING QUALITY OF LIFE

**Key function:** Managing civic amenities and urban resources efficiently and responsibly so as to make them available and affordable for the end consumer

\*Annual Turnover- \$ 115.188 Mn

Carved out from the erstwhile Town Services Division of Tata Steel, JUSCO is a wholly-owned subsidiary of Tata Steel with expertise in integrated town management, power distribution, engineering procurement construction, real estate, and operations and maintenance.

JUSCO focusses on enhancing the quality of life of the residents of Jamshedpur through sustained capital investment and public-private partnership for infrastructure development. Jamshedpur today has among the highest per capita incomes in the country and is rated among the best cities to live in by its residents.



## Tata Pigments Ltd

[www.tatapigments.co.in](http://www.tatapigments.co.in)

# COLOURING THE WORLD

**Key product:** Synthetic iron oxide pigments

\*Annual Production- 19045 MT/KL |  
Annual Turnover- \$ 16.015 Mn

Tata Pigments is one of the largest producers of synthetic iron oxide pigments in India and the only Indian manufacturer of this product with BIS certification. TPL is the preferred supplier of pigments to leading companies in industries such as paints, building materials, plastics, rubber goods, paper and ink. It is also the leading brand in India for flooring colours.

TPL has also diversified its business into the service segment by offering complete solutions for painting requirements to industries.



Tata Steel Alloys

[www.tsalloys.com](http://www.tsalloys.com)

# ENSURING MANUFACTURING EFFICIENCY

**Key product:** Ferro alloys

\*Annual Production- 46741 MT |  
Annual Turnover- \$22.731 Mn

TS Alloys has set up a ferro alloys plant at Anantapur, Odisha, with a capacity of 59,400 MT per annum. Presently, the plant has two 16.5 submerged electric arc furnaces that commenced commercial production in 2007. The plant is located on 143.5 acres of land.



Tata Steel Processing and Distribution Ltd.

[www.tspd.com](http://www.tspd.com)

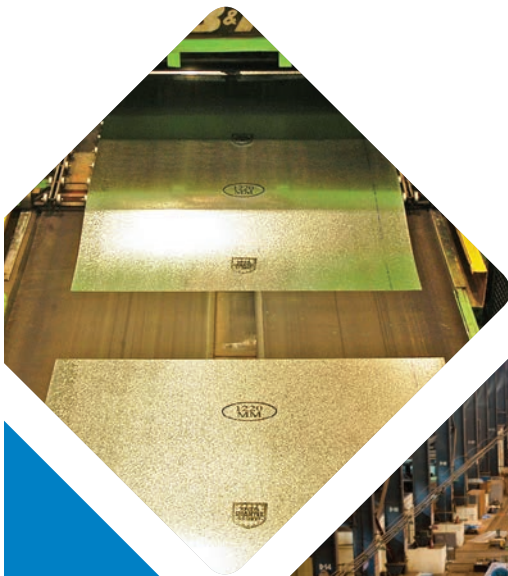
# BRIDGING THE GAP BETWEEN MANUFACTURER AND BUYER

**Key function:** Offering steel services

\*Annual Production-Tolling - 1.363 MnT, Distribution - 0.514 MnT,  
Total - 1.88 Million MT | Annual Turnover- \$361.643 Mn

Recognising the tremendous business potential offered by the vast gap between steel producers' offerings and the actual requirements of steel users, Tata Steel formed a 50:50 joint venture in 1997 with Ryerson Inc., USA, (North America's largest metal processor and distributor), to promote a steel service company, named Tata Ryerson Limited. The Company firmly established itself as the dominant steel service company in India. It became a wholly-owned subsidiary of Tata Steel in 2009 and acquired a new name, Tata Steel Processing & Distribution from January 2010.

A one million tonne Steel Service Centre is coming up at Kalinganagar within Tata Steel's plant. This is part of TSPDL's Phase I development in Kalinganagar and is scheduled to be commissioned by September 2017. Post this, the Phase II expansion will be planned.



Adityapur Toll Bridge Company Limited

## RAPIDLY GROWING INDUSTRIAL CENTRE

**Key function:** Constructing and operating a second road bridge connecting industrial towns of Jamshedpur and Adityapur in Jharkhand

\*Annual Turnover- \$0.63 Mn

Adityapur Toll Bridge Co Ltd (ATBCL), a Special Purpose Company promoted under PPP model by Government of Jharkhand & Tata Steel Ltd. It is a public company incorporated on March 19, 1996. It is classified as Indian non-government company and is registered at Registrar of Companies, Jharkhand. Its authorised share capital is ₹ 21.00 crores and its paid up capital is ₹ 20.38 crores, Tata Steel being the major shareholder with 75% shares.



Tinplate Company of India (TCIL)

[www.tatatinplate.com](http://www.tatatinplate.com)

## EXCELLING SUPPLY CHAIN AND LOGISTICS SERVICES

**Key product:** Packaging solutions for edible and unedible products

\*Annual Production- 332084 MT |  
Annual Turnover- \$124.251 Mn

The Tinplate Company of India Limited (TCIL), a subsidiary of Tata Steel Limited (TSL), was incorporated in 1920 and started its commercial production in 1922. These are among the most versatile packaging substrates used for packaging edible and non-edible products, and are used for its eco-friendly and superior properties vis-à-vis other packaging substrates such as glass, paper, plastics, aluminium, etc.



Tayo Rolls Limited

[www.tayo.co.in](http://www.tayo.co.in)

## MANUFACTURING ROLLS

**Key function:** Manufacture of cast iron and steel rolls

Tayo Rolls Limited, a Tata Enterprise and a subsidiary of Tata Steel since 2008, was promoted in 1968 by Tata Steel Limited and Yodogawa Steel Works Limited, Japan and Nissho Iwai Corporation (now Sojitz Corporation), Japan. Tayo Rolls Limited is a leading Roll manufacturer, headquartered in Jamshedpur, India.

Tata Sponge Iron Limited (TSIL)

## SUSTAINABLE MANUFACTURING

**Key product:** Sponge iron manufacture

\*Annual Production- 390000 MT |  
Annual Turnover- \$ 95.308 Mn

Tata Sponge Iron Limited (TSIL) was conceptualised to put India's first indigenous technology for sponge iron manufacture on a commercial platform.

TSIL is considered a benchmark among the coal-based sponge iron plants. It is arguably the only debt-free, dividend-paying sponge iron company in India for the last 23 years. It is also known for its exemplary environmental standards in an industry otherwise infamous for pollution. It was the first company to receive the integrated certification of ISO-9001, ISO 14001 & OHSAS 18001. It is also the first DRI plant in the world to achieve TPM certification in 2012. It has received a number of state and national awards from the government and industrial confederations and institutions in the fields of environment, productivity, safety, quality, HR, corporate governance, etc.

## Jamshedpur Continuous Annealing and Processing Company Pvt Ltd (JCAPCPL)

# ENABLING LOCALISATION

**Key product:** High-grade automotive cold-rolled steels

\*Annual Production- 1303882 MT |  
Annual Turnover- \$ 98.67 Mn

JCAPCPL is a joint venture between Tata Steel Limited (51%) and Nippon Steel & Sumitomo Metal Corporation (NSSMC, 49%). Its state-of-the-art technology caters exclusively to India's growing demand for cold rolled steels in the automotive segment. It thus enables automotive OEMs to address their strategic objective of increased localisation. Located within Tata Steel's Jamshedpur Works, the company has an installed capacity of 600,000 TPA.



## TM International Logistics Limited (TMILL)

[www.tmilltd.com](http://www.tmilltd.com)

# EXCELLING SUPPLY CHAIN AND LOGISTICS SERVICES

**Key function:** Providing port logistic support and solutions

\*Annual Turnover- \$77.446 Mn

TM International Logistics Limited was incorporated as a joint venture company between Tata Steel and IQ Martrade of Germany to provide cost-efficient port-related services.

With the vision of being a reliable logistics service provider characterised by operational excellence, TMILL's wide range of logistics services comprises port operations, shipping, freight forwarding, customs house agency, inland logistics, warehousing, ship agency services and marine services.





## Tata Metaliks Limited

[www.tatametaliks.com](http://www.tatametaliks.com)

# ADDING VALUE

**Key function:** Production of hot metal using iron ore, coke and fluxes

\*Annual Production- 381968 Hot metal tons |  
Annual Turnover- \$206.11 Mn

Tata Metaliks Ltd (TML) is a listed company and subsidiary of Tata Steel (holding 50.09%). Seventy percent of its production is converted into foundry-grade pig iron while the remainder is transformed into molten metal for value addition and converting into ductile iron pipes by its 100% subsidiary, TMDIPL. Both plants are located at Kharagpur, West Bengal. TML holds a leadership position in the foundry grade pig iron market.



## m-junction

[www.mjunction.in](http://www.mjunction.in)

# THE WORLD'S LARGEST STEEL E-MARKETPLACE

**Key function:** The sale of secondary steel online

\*Annual Turnover- \$27.062 Mn

Kolkata-based m-junction Services Limited was incorporated in 2001 as a 50:50 joint venture between Tata Steel and SAIL. Today, m-junction is not only the world's largest e-marketplace for steel, it also exists on a wide spectrum of B2B e-commerce services comprising e-selling, e-procurement, e-finance, e-retail, loyalty solutions and knowledge services across diverse industry verticals.

m-junction's entire ecosystem consists of nearly 180,000 partners, buyers, sellers and influencers. It operates out of eight business units and employs more than 800 persons across India.



S&T Mining

[www.stmining.com](http://www.stmining.com)

# EXPLORING OPPORTUNITIES IN MINING

**Key function:** Optimising and exploring opportunities in mining

A 50:50 joint venture of SAIL and Tata Steel, S&T Mining's main objective is to work in the coking coal and mineral space domestically and internationally. The other objectives of the Company include beneficiation of coal and minerals, acquisition of international mining assets, mining of other minerals related to raw materials of steel and building on a competency, to provide consultancy services.



Tata BlueScope Steel

[www.tatabluescopesteel.com](http://www.tatabluescopesteel.com)

# CREATING A NEW WORLD IN STEEL

**Key product:** Coated steel, steel building solutions and related building products

\*Annual Production- 385103 MT |  
Annual Turnover- \$275.983 Mn

Tata BlueScope Steel is an equal joint venture between Tata Steel and BlueScope Steel. The joint venture was established in November 2005 to operate in the SAARC region (South Asian Association for Regional Cooperation). The company has facilities in Chennai, Jamshepur, Pune and Bhiwadi. Its Coated Steel Business Division and Building Products Division have developed multiple brands that are leaders in their segments.

#### KEY BRANDS

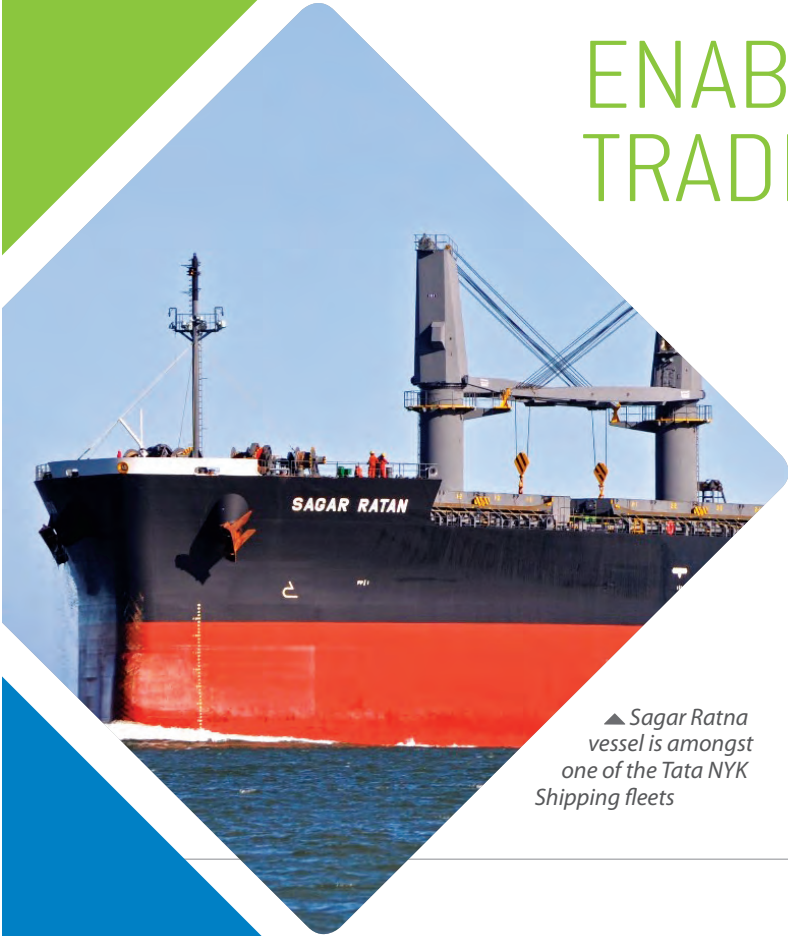
- ▶ ZINCALUME® steel
- ▶ DURASHINE®
- ▶ EZYBUILD®
- ▶ BUTLER® BUILDING SYSTEMS
- ▶ ECOBUILD™ BUILDING SYSTEMS
- ▶ COLORBOND® steel
- ▶ LYSAGHT®



Tata NYK Shipping Pte Ltd

[www.tatanykshipping.com](http://www.tatanykshipping.com)

## ENABLING EFFICIENT TRADE AND TRANSPORT



▲ Sagar Ratna vessel is amongst one of the Tata NYK Shipping fleets

**Key function:** Managing supply chains

\*Annual Turnover- 212.7 USD Mn

Tata NYK Shipping Pte. Ltd is a 50:50 joint venture of Tata Steel and NYK Line – one of the largest shipping companies in the world. Tata NYK offers solutions that help its customers manage their supply chain effectively.

Tata NYK has several diversified, high-performance, environment-friendly Japanese-built vessels. Its ability to trade worldwide in a multitude of trade routes, carrying a wide range of cargoes for a varied set of customers, gives it a competitive edge. Tata NYK has attained ISO 9001:2008 and ISO 14001:2004 certifications.

Jamipol

[www.jamipol.com](http://www.jamipol.com)

## DRIVING QUALITY



**Key product:** Desulphurising compounds used in the external desulphurisation of hot metal (liquid iron)

\*Annual Production- 74496 MT |  
Annual Turnover- \$42.734 Mn

JAMIPOL is a joint venture between Tata Steel (42%), SKW Stahl-Metallurgie, Germany (30%) and TAI Industries and associates (27%). With a key purpose of improving the quality of life through leadership in sectors of national economic significance, JAMIPOL's products are certified to Integrated Management System (IMS) for three major international standards – ISO 9001:2008, ISO 14001: 2004 and OHSAS 18001: 2007. The company has facilities in Kalinganagar and Jamshedpur.

\*FY 2016-2017

For more information please contact:  
Corporate Communications

MUMBAI, INDIA

**TATA STEEL LIMITED**

Bombay House, 3rd Floor  
24 Homi Mody Street, Fort  
Mumbai- 400001  
India  
T: + 91 22 6665 8282  
F: +91 22 6665 7724

JAMSHEDPUR, INDIA

**TATA STEEL LIMITED**

P.O. Bistupur  
Jamshedpur - 831001  
Jharkhand  
India  
T: +91 657 242 3573  
F: +91 657 242 5182

BANGKOK, THAILAND

**TATA STEEL (THAILAND)**

555 Rasa Tower 2, 20/F Floor,  
Phaholyothin Road, Chatuchak,  
Bangkok 10900  
Thailand  
T: +66 2937 1000  
F: +66 2937 12

SINGAPORE

**NATSTEEL HOLDINGS**

22 Tanjong Kling Road  
Singapore 628048  
Singapore  
T: + 65 6265 1233  
F: + 65 6265 8317

IJMUIDEN, THE NETHERLANDS

**TATA STEEL LIMITED**

**Postal address:**  
Postbus 10.000, 1970 CA  
IJmuiden

LONDON, UK

**TATA STEEL LIMITED**

30 Millbank  
London SW1P 4WY  
United Kingdom  
T: +44 (0)20 7717 4444  
E: [Feedback@tatasteel.com](mailto:Feedback@tatasteel.com)

[www.tatasteel.com](http://www.tatasteel.com)

While care has been taken to ensure that the information in this brochure is accurate, neither Tata Steel nor its subsidiaries accept responsibility or liability for errors or information which is found to be misleading.

As on 31<sup>st</sup> March 2017: The reference timeline of the brochure content.



Printed on FSC Certified Paper

Concept and Design by **quadrum**   
[www.quadrumltd.com](http://www.quadrumltd.com)