

**MAKING
TOMORROW**
CORPORATE BROCHURE 2018





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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.



A close-up, high-angle shot of a male worker in a yellow safety suit and helmet, focused on measuring a large, curved metal component with a digital caliper. The worker is wearing safety glasses and earplugs. The background is a blurred industrial setting.

TATA GROUP OVERVIEW

LEADERSHIP
WITH TRUST

▲ *The precision and commitment to
maintain the best quality keeps us ahead of the curve*



COMMITMENT
WITH INTEGRITY

▲ We deliver more than what we promise to our stakeholders

A portrait of Jamsetji Nusserwanji Tata, the founder of the Tata Group. He is an elderly man with a long white beard and mustache, wearing a traditional Indian turban with a colorful pattern. The portrait is set against a dark background and is framed by a large, dark, triangular shape that points towards the bottom right. In the top right corner, there is a blue triangular graphic element.

*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 and 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



695,000
EMPLOYEES AND OPERATIONS IN OVER
100 COUNTRIES



**GLOBAL
LEADER**
IN SEVERAL SECTORS




THE MARKET
CAPITALISATION OF THE
29 COMPANIES LISTED
UNDER THE TATA
GROUP IS

US\$ 
144.79 BN

AS ON MARCH 31, 2018

~64%
REVENUE GENERATED IN
GEOGRAPHIES
OUTSIDE INDIA



WITH PRODUCTS
AND SERVICES
IN OVER

150
COUNTRIES



GROUP
REVENUE OF

~\$100 BN



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.

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 wholesale
voice provider



1st

Volume

**Tata Global
Beverages**
Largest tea company



2nd

Tata Consultancy Services
Largest IT services company



2nd

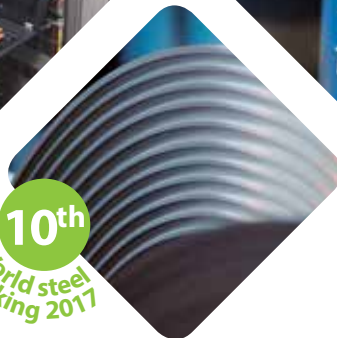
Market Cap
and Profit

3rd



Tata Chemicals
Largest producer of
soda ash

10th
World steel
Ranking 2017



Tata Steel
Steelmaker

Top
10



Tata Motors
Commercial vehicle
manufacturer

India Ranking

Titan Company
Largest manufacturer and
retailer of branded watches,
jewellery and eyewear



1st

Tata Power
Largest integrated power
company and largest renewable
energy company



1st

Tata AutoComp
Leading auto-component
manufacturer



Voltas
Market leader in room
air conditioners



1st

Tata Technologies
Largest pure play
engineering and design
services provider



1st

Indian Hotels Co Ltd.
One of Asia's largest and
finest group of hotels



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 695,000
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, the Tata brand, today, is 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

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

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.



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



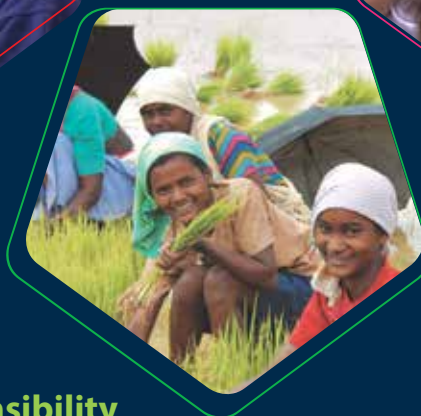
Pioneering

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.

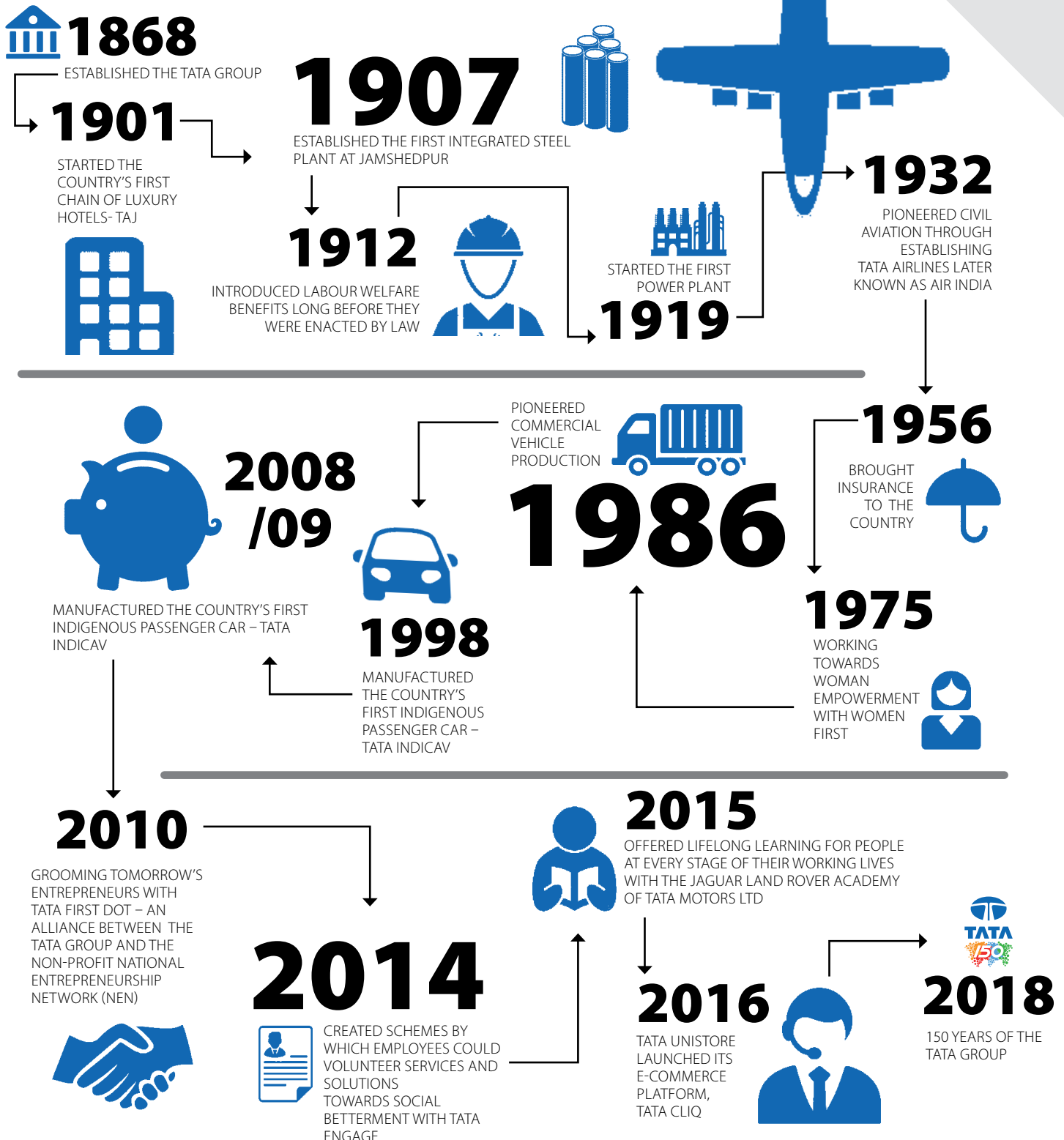


Unity

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, philanthropist and humanist. He pioneered India's industrialisation at the turn of the 20th century, injecting a 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 N Tata

Chairman (1992–2012)

Interim Chairman (October–November 2016)

Chairman Emeritus (2012–2016/2017 onwards)

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)

Mr Natarajan Chandrasekaran is the Chairman of Tata Sons Limited and the former CEO and MD of Tata Consultancy Services (TCS). Under his leadership, TCS became the largest private sector employer and was rated as the world's most powerful brand in IT services in 2015.

TATA STEEL GROUP OVERVIEW

DRIVING
EXCELLENCE

▲ Delivering the value of 'perfection' through
Total Quality Management approach



BUILDING VALUES

▲ Our Vocational Institutes provide wings to talented underprivileged youth for livelihood opportunities



◀ *Eyes for precision and desire for quality drive our employees towards complete customer satisfaction*

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.

1907

TATA STEEL
WAS
ESTABLISHED

**LEADING
GLOBAL STEEL
COMPANIES**

**ONE OF
THE MOST**

GEOGRAPHICALLY-DIVERSIFIED
STEEL PRODUCERS

ASIA'S

1ST

INTEGRATED
PRIVATE
SECTOR STEEL
COMPANY.

WITH EMPLOYEES ACROSS
FIVE CONTINENTS

TODAY, IT IS
AMONG THE



WITH OPERATIONS IN

26

COUNTRIES



A COMMERCIAL
PRESENCE IN OVER



50

COUNTRIES



THE GROUP
RECORDED
AN ANNUAL
TURNOVER OF

US\$ 20 BILLION



**SOME OF THE
NOTABLE
AWARDS
RECEIVED BY**

TATA STEEL GROUP

1 Sustainability
Champion 2017
by World Steel
Association

2 Prime Minister's
Trophy for 2017

3 Golden Peacock HR Excellence
Award' for the year 2018

4 Dun & Bradstreet
Award 2018

5 Innovative Practices
Awards 2018 by UN
Global Compact
Network India

6 MINT
Corporate
Strategy
Awards 2018

7 National Metallurgist
Award (Industry) 2018



ANNUAL PRODUCTION OF

25.39 MILLION

TONNES IN THE FINANCIAL YEAR
2017-18.

WITH AN ANNUAL CRUDE STEEL
CAPACITY OF NEARLY

27.5 MILLION

TONNES PER ANNUM
AS ON 31ST MARCH, 2018



Pan view of
Jamshedpur
steel plant ▶

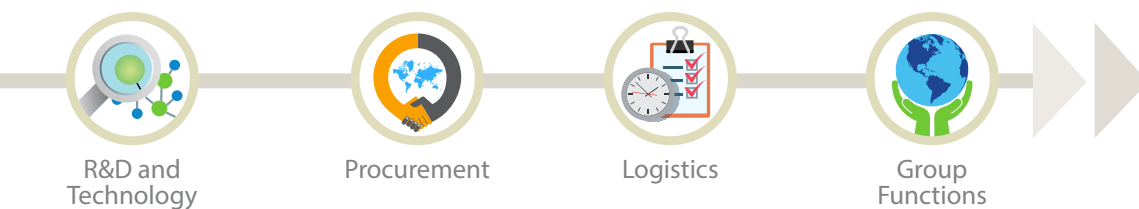
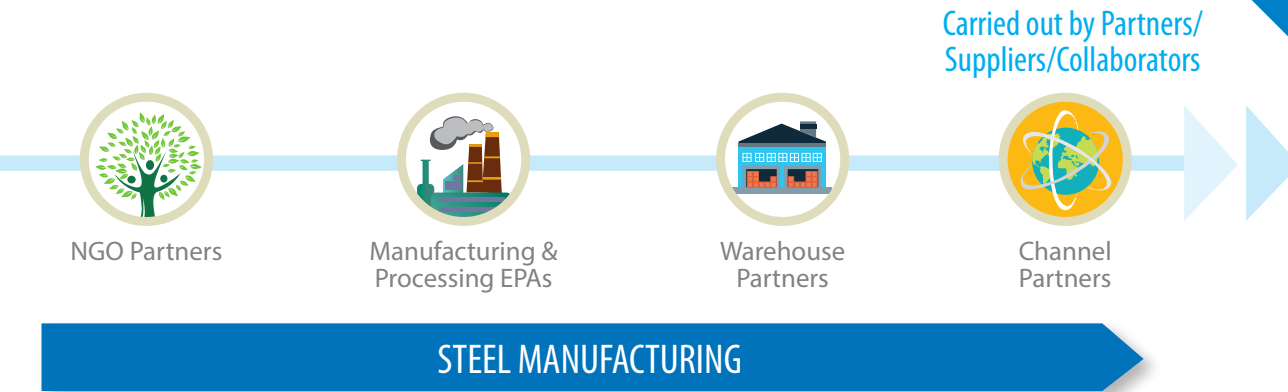


SUSTAINABLE BUSINESS VALUE CHAIN



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 manufacturing of equipment, bearings, agricultural implements etc.



Customers

MARKETING AND SALES VERTICALS

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

Automotive and Special Products (A&SP): This vertical sells strip to bar, tube, welded blanks to advanced automotive steels.

Branded Products & Retail: 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.

Services and Solutions: A new portfolio of services & solutions mainly catering to B2C segment.

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



INDIA

PRODUCT RANGE

Flat Products

- Hot Rolled Coil
- Cold Rolled Coil
- Coated Coil

Long Products

- Wire Rod
- Rebar

Tube Products

- Precision Tubes
- Structural Tubes
- Hollow Sections

KEY MARKET SEGMENTS

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

KEY BRANDS

TATA Shaktee
Galvano
TATA Tiscon
Astrum
Steelium

EUROPE

UK, THE NETHERLANDS

PRODUCT RANGE

Flat Products

Automotive Products

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

Long Products

- Steel Bars
- Tubes

Solutions

- Walls
- Ancillaries
- Purlins and C21ladding Rails
- Roof Services
- Consulting

KEY BRANDS

YImagine
Protact
MagiZinc
Trisobuild

Trisobuild
ComFlor
Coretinium
Colorcoat

KEY MARKET SEGMENTS

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

▲ Port Talbot plant, Wales

▼ Production facility at Tata Steel Thailand

THAILAND

PRODUCT RANGE

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

KEY MARKET SEGMENT

- Construction

KEY BRANDS

Tiscon Superlinks
TATA Tiscon

SOUTH EAST ASIA

SINGAPORE

PRODUCT & SOLUTION 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

OPERATIONS ACROSS CONTINENTS

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

UK

PORT TALBOT

4.9

MTPA



CANADA

IRON ORE MINES
QUEBEC, NEWFOUNDLAND
& LABRADOR

MUMBAI

ISTANBUL

CAIRO

DUBAI

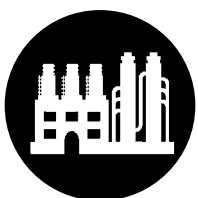
JOHANNESBURG



SALES
OFFICE



OPERATING
MINES



STEEL
MAKING



**SOUTH
AFRICA**

SEDIBENG (IRON ORE)

THE NETHERLANDS

IJMUIDEN

7.2

MTPA



INDIA

JAMSHEDPUR

9.7

MTPA

KALINGANAGAR

3

MTPA



SINGAPORE

0.75

MTPA



THAILAND

CHONBURI PROVINCE, RAYONG, SARABURI

1.4

MTPA

INDIA

IRON ORE

NOAMUNDI, JODA EAST,
JODA WEST, KHONDBOND,
KATAMATI

METALLURGICAL COAL

WEST BOKARO, JHARIA

CHROME

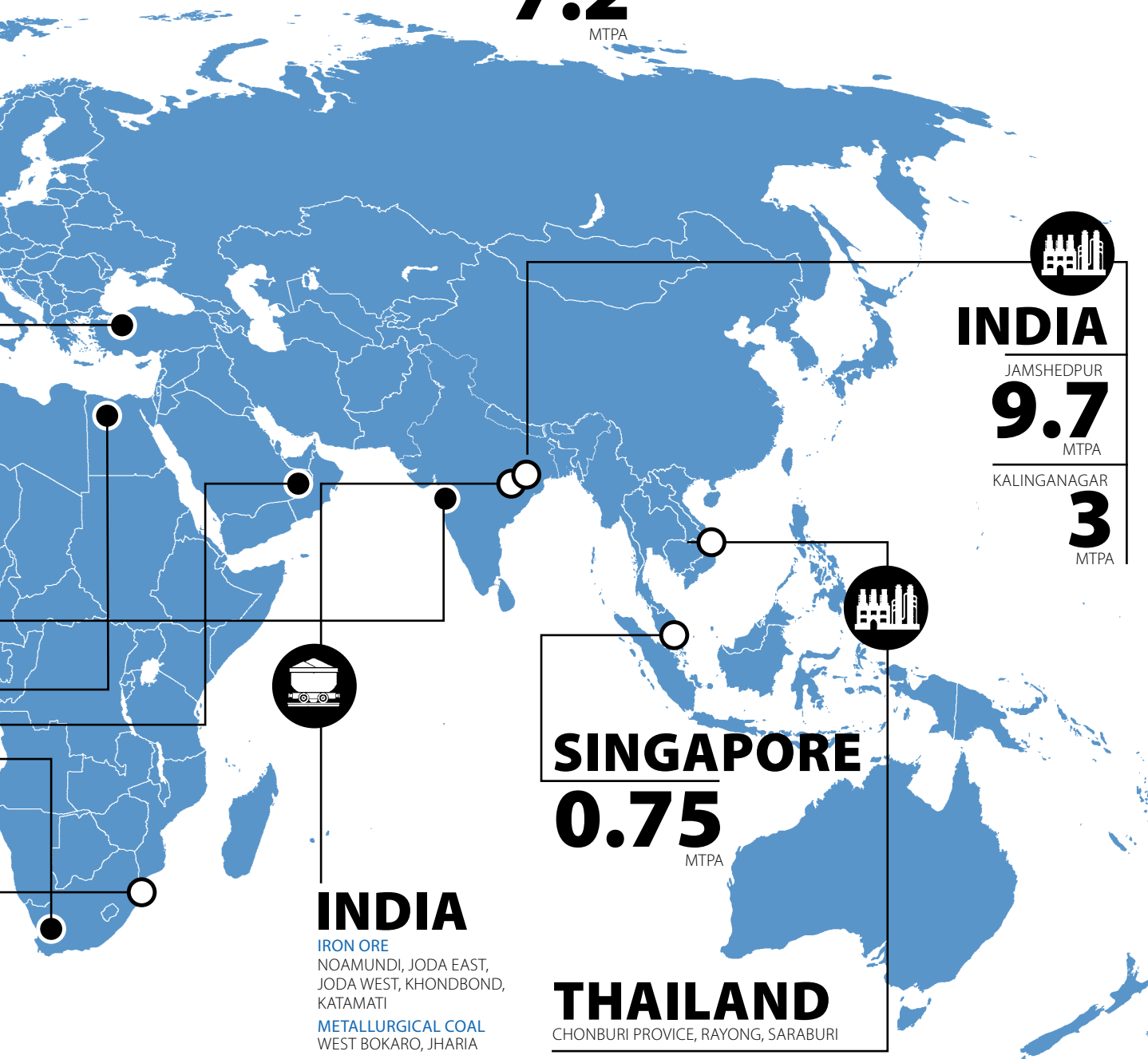
SUKINDA

MANGANESE

TIRINGPAHAR BAMEBARI,
MALDA & JODA WEST

DOLOMITE

GOMARDIH



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.

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.

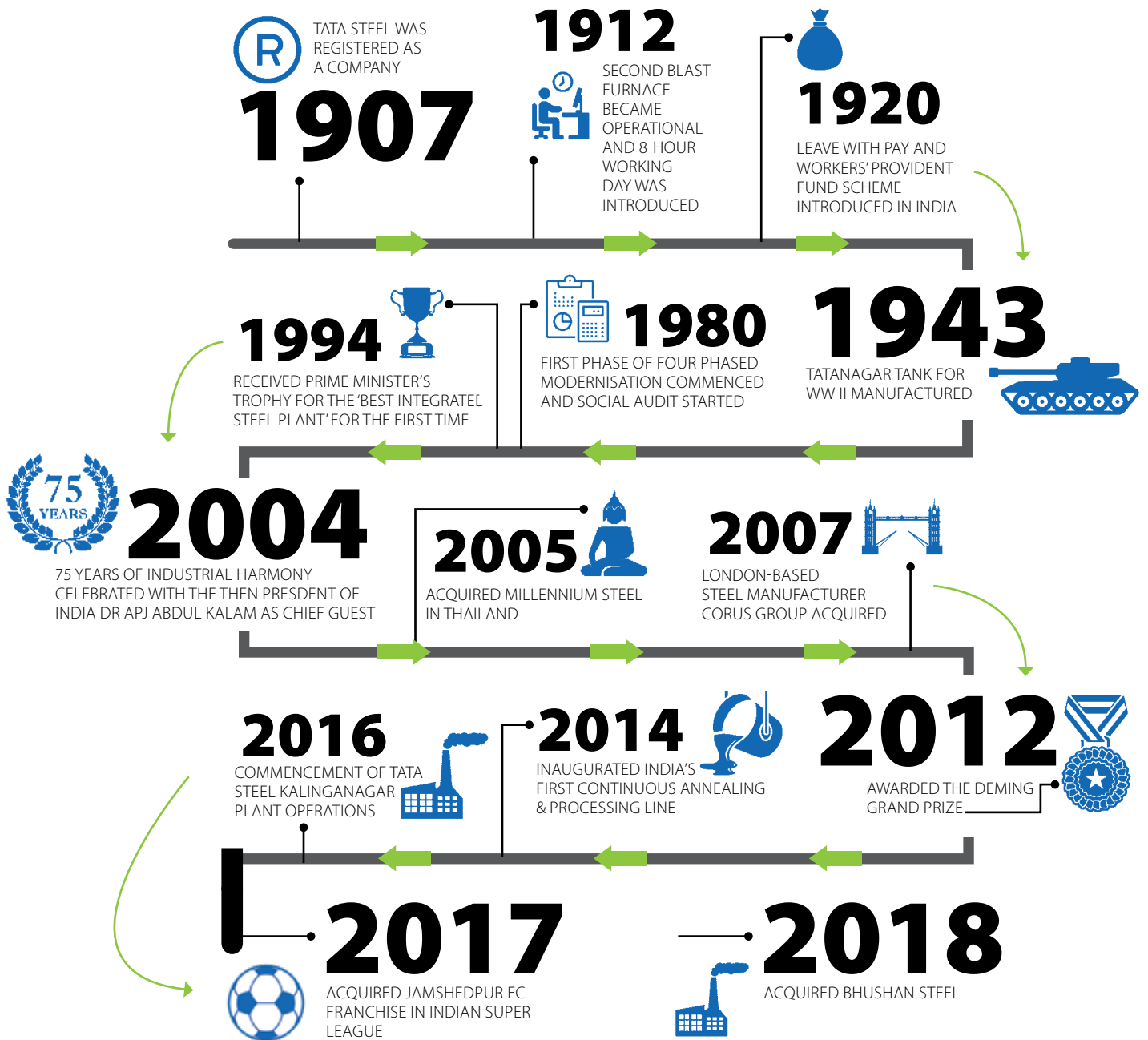
OUR CONDUCT

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 process by clearly defining the Company's approach.

TATA STEEL MILESTONES



AT THE HELM

Board of Directors



- ❶ Natarajan Chandrasekaran
- ❷ Mallika Srinivasan
- ❸ OP Bhatt
- ❹ Dr Petrus Blauwhoff
- ❺ Aman Mehta
- ❻ Deepak Kapoor
- ❼ DK Mehrotra
- ❽ Saurabh Agrawal
- ❾ TV Narendran
- ❿ Koushik Chatterjee

As on March 31st 2018

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
Global CEO & Managing Director,
Tata Steel



Koushik Chatterjee
Executive Director &
Chief Financial Officer, Tata Steel



Hans Fischer
Chief Executive Officer
Tata Steel Europe

GLOBAL FOOTPRINT

▼ Train loading
near dome of mining
location at Tata Steel
Minerals Canada

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 companies 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.

RAW MATERIAL DIVISION



IRON-MAKING

SHARED SERVICES



STEEL-MAKING



◀ Safe work processes ensure employees' health and safety



Total capacity
13 MTPA
Jamshedpur (~9.7 MTPA)
Kalinganagar (3 MTPA)



▲ Production at Tata Steel Kalinganagar has opened new market sectors for the company

MIRRORING MARKET TRENDS

Tata Steel's Marketing & Sales function is aligned to a customer-in structure with four business verticals ensuring user segment focus. The Company leverages its understanding of the customer decision journey to develop value added offerings for each sector as well as new micro segments.





OUR OFFERINGS

BUSINESS VERTICALS	INDUSTRIAL PRODUCTS, PROJECTS AND EXPORTS (IPPE)	AUTOMOTIVE & SPECIAL PRODUCTS	BRANDED PRODUCTS AND RETAILS	SERVICES & SOLUTIONS
PRODUCTS	1. HOT ROLLED 2. COLD ROLLED 3. COATED 4. REBARS 5. WIRE RODS	1. HOT ROLLED 2. COLD ROLLED 3. COATED	1. HOT ROLLED 2. COLD ROLLED 3. COATED 4. REBARS	1. DOORS 2. WARDROBES 3. NEST-IN PORTFOLIO
SECTORS	INFRASTRUCTURE HOUSING AUTOMOTIVE CONSTRUCTION RAILWAYS PRE ENGINEERED BUILDINGS LPG CYLINDERS	COMMERCIAL VEHICLES PASSENGER VEHICLES TWO WHEELERS	AUTO ANCILLARIES ROOFING GENERAL ENGINEERING AGRICULTURE BUILDING PRODUCTS	ROOFING FURNITURE CONSTRUCTION BUILDING PRODUCTS AGRICULTURE



Tata Steel Kalinganagar has opened opportunities for a stronger place in value creating segments.

FOCUS AREAS

-  New and Enriched products
-  Services & Solutions
-  Entry into new segments
-  Maintaining leadership position in chosen segments

In FY'18
Tata Steel introduced
133
new products.



▲ Steel coils ready for despatch to customers

BUSINESS VERTICALS

1

Industrial Products, Projects and Exports

Tata Steel offers a wide range of products and services for infrastructure development and construction. Steel manufactured by the Company is used in two-thirds of the country's metro rail, flyovers and bridges. The Company exports over 1 MnT of steel to various geographies.



2

Automotive & Special Products

Tata Steel is a dominant player in the Indian automotive sector, a focus area for the Company. It improves its share of business by continuously developing products that meet the needs of the segment. The Company has developed different grades for wheels and structural applications, enlarging its product basket and its market share. Steel manufactured by Tata Steel is used in almost every vehicle in the country.



OUR BRANDS



automotive steels
FROM
TATA STEEL



TATA
ASTRUM
HR SHEETS AND COILS



Galvano[™]
Value Redefined
Coated Sheets and Coils

TATA
Steelium

PRAVISH
A TATA STEEL PRODUCT



TATA
PRECISION TUBES





*Unique Structures created
from Tata Steel's Products*

Tata Steel has strengthened its leadership position in the Automotive segment through product and non-product value creation. It has commercialised new products such as high-tensile HR grades to achieve growth much higher than the industry average.

Steel manufactured by the Company is used in two-thirds of the country's metro rail, flyovers and bridges, while its value-added products serve about 4 million rural households in India.

BUSINESS VERTICALS

3

Branded Products and Retail

The market leader in this segment, Tata Steel continuously invests in growing its branded products portfolio, through value added products, and its channels to gain greater market share. The branded products contribute to around 46% of total sales. Product development initiatives, channel capability enhancement and augmentation of service centres have enhanced Tata Steel's presence in key micro segments.



4

Services & Solutions

Tata Steel continuously increases its presence in the Services & Solutions spaces to create a stronger connect with its consumer, and provide them with a superior experience. Many of these are first-of-a-kind services & solutions for the Indian market. Pravesh Steel Doors and Windows, ReadyBuild cut and bend rebar solutions and Nest-In housing solutions are some of the Company's recent offerings. These have been well accepted by consumers.



Pravesh (steel doors & windows) crossed bookings of

1.2 LAKH

in FY'18.



▲ Pravesh Doors exude the elegance of wood and the strength of steel.

Steel grades, meeting the stringent requirements for applications in bank ATMs, grain silos, solar back panel, lifting and excavation segment, pre-engineered buildings and oil & gas sector, have been developed.

'Nestudio' under the 'Nest-in' family of products was launched for the premium-housing category.



▲ Nestudio is a convenient solution when it comes to quick, simple & premium housing requirements

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.



Carbon rate at our blast furnaces at Jamshedpur has been reduced by 10 kg/tonne of hot metal.

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 has strengthened the product portfolio in India while rebalancing steelmaking capacities across the group.

1

**HOT
ROLLED
COILS**



**MAIN
PRODUCTS
MANUFACTURED
AT JAMSHEDPUR**

**COLD
ROLLED COILS**

2



3

**WIRE
RODS**



4

**GALVANISED
COIL**



5

REBARS

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

*ANNUAL TURNOVER

\$31.3

Mn

KEY PRODUCT

QUALITY AGRICULTURAL
IMPLEMENTS

PRODUCTION

147.4 LAKH UNITS

TATA STEEL GLOBAL WIRES (TSGW)

*ANNUAL TURNOVER

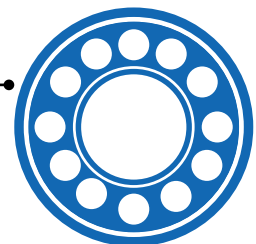
\$56.25

Mn

PRODUCTION

**360,000
TONNES**

KEY PRODUCT
STEEL WIRE



TATA BEARINGS

*ANNUAL TURNOVER

\$5.99

Mn

PRODUCTION

38

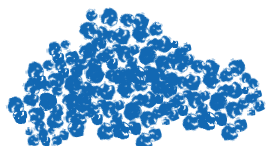
Mn

PIECES

KEY PRODUCT

A WIDE RANGE OF BEARINGS

INDUSTRIAL BY-PRODUCTS MANAGEMENT DIVISION (IBMD)



REVENUE IN

FY'18
\$505.61 Mn

TOTAL SALES BY IBMD IN

FY'18- 9.8 MnT

KEY PRODUCT

STEEL BY-PRODUCTS AND SCRAP

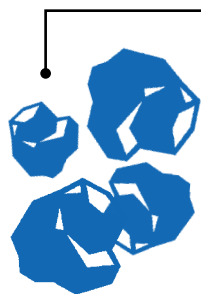
TATA GROWTH SHOP (TGS)

*ANNUAL TURNOVER

\$39.14 Mn

KEY PRODUCT

DESIGN AND
MANUFACTURE OF
HEAVY MACHINERY AND
EQUIPMENT



FERRO ALLOYS AND MINERALS DIVISION (FAMD)

*ANNUAL TURNOVER

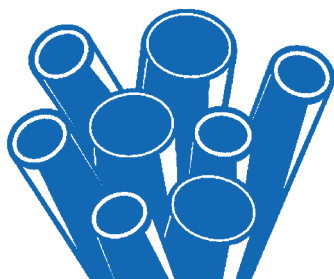
\$190.72
Mn

PRODUCTION:

1270 KILO TONNES

KEY PRODUCT

HIGH CARBON FERRO CHROME



TATA TUBES

*ANNUAL TURNOVER

\$378.44 Mn

KEY PRODUCT

TUBES



Odisha - Kalinganagar

A PROMISE FULFILLED

Tata Steel, which has always played a meaningful role in nation building, is contributing to the India growth story by pursuing a growth and expansion plan to continuously add to its steel making capacity through organic and inorganic growth.

India's largest capital investment in the last 20 years, Tata Steel Kalinganagar (TSK) is a greenfield plant set up by Tata Steel in the state of Odisha.

TSK has enabled the Company's entry into new and promising market segments. It produces high-end products for the oil & gas, lifting & excavation, infrastructure, defence, shipbuilding, energy & power sectors.

A strong player in the automotive industry, Tata Steel will now expand the capacity of TSK to 8 MnTPA to produce value-added products, including cold rolled, galvanised and annealed products to serve a differentiated customer base.

Unique Technologies at Kalinganagar

Large capacity
**material
energy**
efficient Blast Furnace

Optimised
Solid Waste
utilisation
producing granulated
slag for downstream application
in cement making

85%
of inbound and outbound
logistics by rail

**Twin wagon
tippler**
the first such
installation in India
– with unloading capacities
of 20 MnTPA

► Significant quality
ramp-up in steel-
making & development
of new products
has been positively
accepted by customers.



Tata Steel Kalinganagar manufactures

3 MnTPA

of high-end Flat Products, with slab widths ranging from

1000

to

2150

mm

The plant is designed to have a minimal water footprint with

zero effluent discharge

It uses

Coke Dry Quenching

technology to conserve thermal energy and by-product gas for power generation, reducing its carbon footprint

Superior pollution control

ensures significant reduction of noise and dust pollution.

▼ The Tata Steel Kalinganagar plant (night view)



Odisha - Kalinganagar

SOCIAL INVESTMENT FOR A BETTER LIFE

An agrarian society has been transformed at Kalinganagar into an industrial society. With investments in the steel project, Tata Steel made social investments towards inclusive growth, providing opportunities for education, skill development, self-help groups, job creation and development of vendors to provide products and services to the Company. This investment has created a wide impact.

Under Tata Steel's unique Resettlement and Rehabilitation Plan, members of Tata Steel Parivar, comprising project displaced families received benefits that extended beyond entitlements. All the members of Tata Steel Parivar have round-the-clock access to free medical services including medicines, free education for children.

Women from displaced families are trained in various pursuits including painting for livelihood opportunities



Social Initiatives

Rehabilitation Colonies

created with all civic infrastructure

200 bed

Tata Medica Super Specialty
Hospital established

PRERNA

Skill Development Center with
technical support from the Nettur
Technical Training Foundation

Loyola School

a reputed academic institution,
set up by
Tata Steel

Parivar Scholarship

offered to
meritorious children

Employment Impacts

21000

jobs created

59.62 %

of Tata Steel's employees are from
Odisha

80.71%

of the total contractors' workforce
belongs to the state

22.76%

(822)
of employees
and

32.07 %

(5884)
of the total contractors'
workforce belong to the
district of Jajpur



Odisha - Gopalpur

EXPANDING PRESENCE. AUGMENTING CAPACITY

Keen to expand its engagement as a partner in the progress and development of the state of Odisha, after the Jajpur district Tata Steel is inducing economic development in Ganjam district.

Tata Steel Special Economic Zone Ltd, a 100% subsidiary of Tata Steel, is developing a multi-product Industrial Park in Gopalpur, which includes Tata Steel's 55,000 tonne per annum (TPA) ferro-chrome plant as anchor investment. The Industrial Park will attract national and international investments in steel and allied downstream industries, engineering, chemicals and other emerging sectors. It will also generate substantial employment opportunities for local youth.

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

KEY FEATURES

Well planned internal roads
Abundant water resources
Reliable power supply

Location & Connectivity



Road

On national highway 16, 170 Km to Bhubaneswar



Rail

4 Km to Railway siding, 14 km to Berhampur railway station



Sea

4 Km to Railway siding, 14 km to Berhampur railway station



Air

4 Km to air strip
170 Km to International airport

► Ferro-chrome plant, a part of the Industrial Park, commissioned in 2017 at Gopalpur, Odisha.



Bhushan Steel*

EXPANDING IN SIZE FOR SUSTAINABILITY

The acquisition of Bhushan Steel is a strategic investment for Tata Steel as it adds to Tata Steel's product portfolio and market competitiveness.

Bhushan Steel is among the largest manufacturers of cold rolled steel and auto-grade steel in the country. Bhushan Steel offers auto grade outer and inner panel cold rolled steel. It is the first in India to provide the solutions to the appliance industry by substituting electrogalvanized steel.

Manufacturing Capacities

3.70 Million Tonnes Per Annum (MnTPA) of hot metal
2.1 MnTPA (Gross) of Coke
6.48 MnTPA (Gross) of Sinter
5.65 MnTPA for Steel Manufacturing
5.40 MnTPA Hot Strip Mill (HSM)



Products

- Hot Rolled Coil, Cold Rolled Close Annealed, Cold Rolled Full Hard, Galvanized Coil and Sheet, Galume Coil and Sheet,
- Colour Coated Coils, Colour Coated Tiles, High Tensile Steel Strips, Hardened & Tempered Steel Strips,
- Precision Tubes, HFW/ERW Pipe (API Grade), 3LP Coated Pipes, Billets and Sponge Iron



► Bhushan Steel plant at Angul, Odisha, India.

* Now Tata Steel BSL

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 (78% holding), Government of Quebec (18%) and New Millennium Iron Corp (4% holding). TSMC's iron ore mining units are located in Quebec, Newfoundland and Labrador in Canada. The company has invested ~ CAD \$1.3-1.4 Bn and achieved sales of over 4.6 Mnt.

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.

► Processing facilities dome at TSMC Canada



► Iron ore mining by TSMC Ltd in Canada



► Our sustainable mining operations are boosted by integrated technologies





Raw Materials

ENABLING RAW MATERIAL

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

RAW MATERIAL SOURCES



COAL

Coal is sourced from of two mine groups - Jharia Group and West Bokaro Group.

JHARIA DIVISION

It has a leasehold area of 5500 acres, structured into two colliery groups (Jamadoba and Sijua) and 5 operative underground collieries.

WEST BOKARO

It has a leasehold area of 4300 acres, with two opencast sites, a coal washing and processing capacity of 7 Mn TPA, along with a Quick Loading Station.

IRON ORE

Spread across a combined leasehold area of 3212 acres, the Company's mines are located in Noamundi, Joda, Katamati and Khondbond in Jharkhand and Odisha.

- Supplies 100% of the iron ore requirement to TSJ and TSK Works.
- Mining operations are managed by Integrated Management Systems.



FERRO ALLOYS

The Ferro Alloys and Mineral Division (FAMD) is one of the largest profit centres of Tata Steel Limited.

- Integrated value chain extending from mining, beneficiation and production, to marketing and sales.
- Three distinct business lines are – Chrome, Manganese and Flux mining; also markets two branded products- Tata Silicomag and Tata Ferromag.

► We use latest mining technologies to mechanise the operations and focus on safety & costs



▲ Our iron ore mines win innumerable awards every year for safe mining and environmental practices

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.

Our European operations recorded total deliveries of 9.99 MnT and a turnover of \$9218.53 Mn.

*As on March 31, 2018

MANUFACTURING UNITS* AND OTHER FACILITIES

IJMUIDEN

SLAB

HOT ROLLED COIL

COLD ROLLED COIL

COATED STRIP PRODUCTS
(GALVANISED)

PORT TALBOT

SLAB

HOT ROLLED COIL

COLD ROLLED COIL

GALVANISED COIL

OTHER FACILITIES

SPECIAL STEELS

ULTRA-PURE RE-MELTED
STEELS

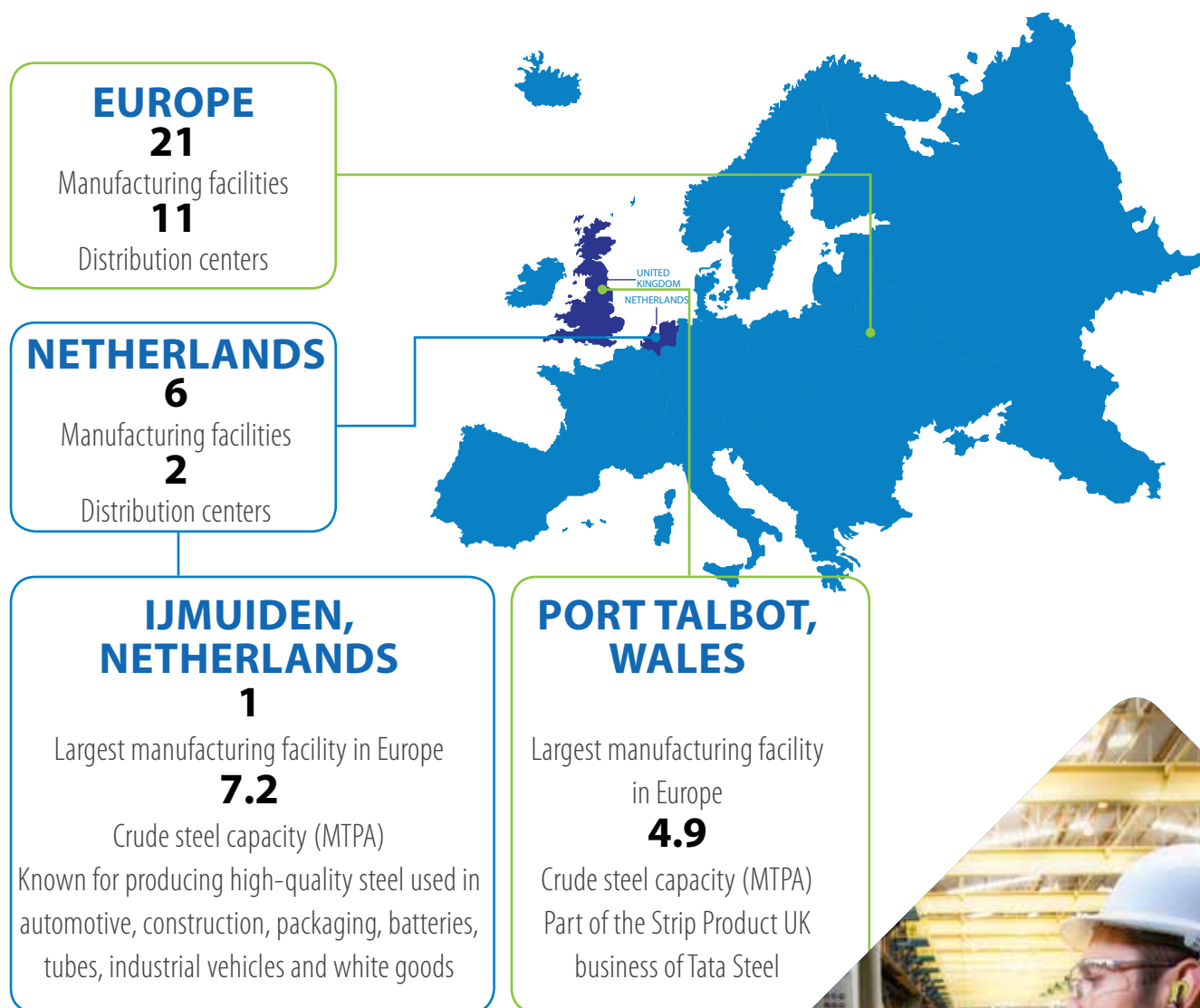
VARIOUS ROLLING AND
COATING LINES

**Refer to page 57*

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.




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.

► Employee controlling the plant operations through automated systems





▼ IJmuiden

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

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.

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

*Tata Steel and thyssenkrupp AG signed definitive agreements to combine their European steel businesses in a 50/50 joint venture in a new company on June 30, 2018. This follows the signing of a Memorandum of Understanding in September 2017.





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

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		

BMW awarded TSE with a maximum rating of 100 for quality and adjudged it as the best performing supplier.

► An eye for perfection puts us amongst the best steel companies in Europe



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



40%

Market share

One of the best steel producers in Singapore.



0.75 MTPA

Operating capacity

One of the world's largest single rebar fabrication downstream operations.



75%

Proportion of scrap from the city consumed in the plant

NatSteel is the only steel company in Singapore with integrated upstream and downstream operations.



\$761.9 Mn

Turnover in FY 18

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

TATA STEEL THAILAND

 **1.4 MTPA**
Rolling (finished) capacity

It is the largest producer and distributor of long steel products in Thailand.

10%
Steel exported to global destinations

Majority of steel produced by Tata Steel Thailand is consumed by the domestic market.



\$641.3 Mn
Turnover in FY 18



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)



THE BIGGER PICTURE

Tata Steel's purpose is to create value for all stakeholders. Tata Steel's vision, therefore, places equal emphasis on value creation and corporate citizenship. This is derived from the purpose the Founder, Jamsetji Tata envisaged for the enterprise. Its aim is to grow in a manner that is sustainable and benefits the communities where it operates.

While the Company's primary focus is on growth and expansion, it is mindful of the need to act responsibly for the sustainability of its operations and to minimise the impact of its operations.

It therefore sees innovation and technology not only as a medium to improve operational excellence and create value for business but also to leverage opportunities to become more resource and energy efficient. Hence, its focus on process technology, and improvements that minimise the use of resources such as iron ore, coal and water, while maximising the use of waste. Digitalisation and capability development and measures to improve productivity create the desired competencies, and a smarter factory.



To enhance integrated thinking and shift to a circular economy, the Company focuses on four sustainability pillars.



Innovation



Technology



**Environment
Management**



People

► *Maintaining biodiversity in their natural habitats at our locations is our prime focus*



Sustainability Pillars

LEADING TODAY AND TOMORROW

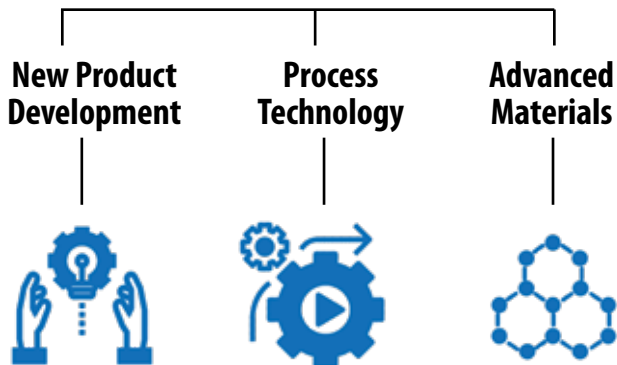
Sustainability is embedded in the business practices of the Company and is driven by its leadership. Focussed initiatives under each sustainability pillar address material issues that further the strategic objectives and sustainability goals of the Company.

Innovation

Tata Steel's approach to being an agile and innovative organisation is based on identifying new technologies and collaborating with innovative people and organisations. Its focus over the next decade is to be the industry leader in research & development.



Focus Areas

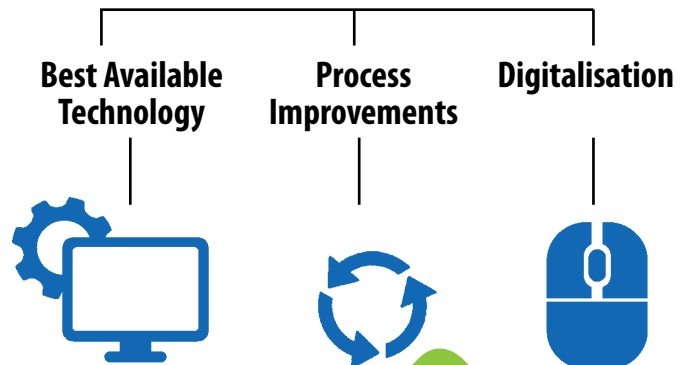


Technology

To strengthen its leadership in its chosen markets, Tata Steel values the importance of technology as a strategic enabler. It, therefore, intends to leverage both steel technology and emerging digital technologies to continuously evolve.



Focus Areas





People

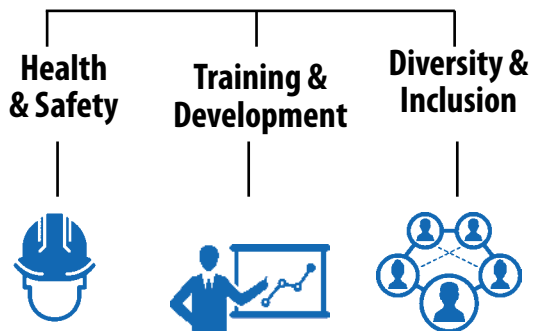
Employees

Tata Steel is leveraging major megatrends shaping the global workspace to create value for the business and its people.

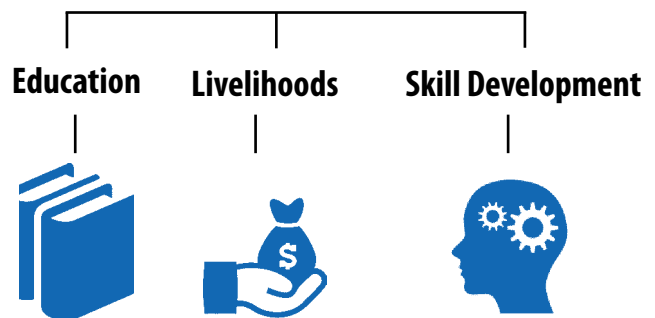
Community

The Company's sustainability goal is to create a lasting impact on communities, impacting 2 million lives by 2025, in its operating areas.

Focus Areas



Focus Areas

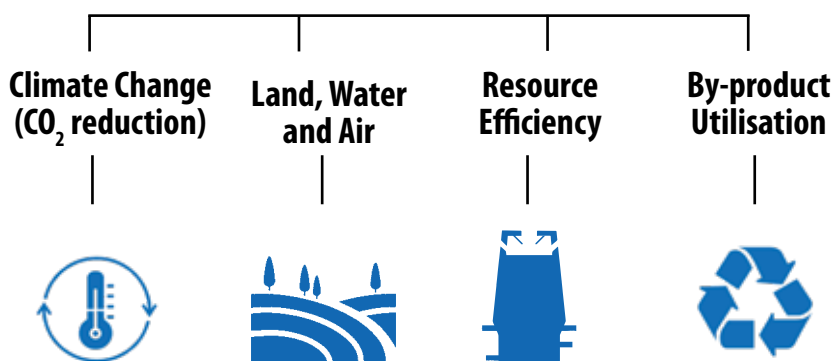


Environment Management



To mitigate the impact of its operations, Tata Steel acts responsibly by conserving natural resources, while making sustainable growth possible.

Focus Areas



Approach to Innovation

ENABLER OF ACHIEVING OBJECTIVES

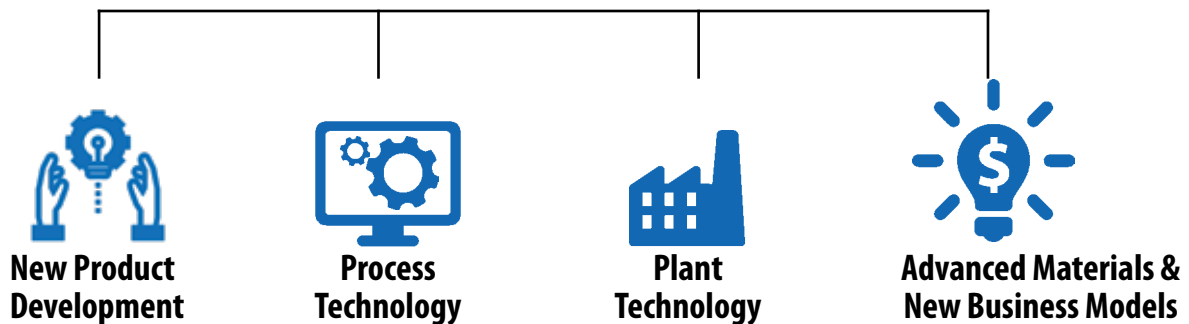
Tata Steel's objective is to be in the top quartile of the industry in agility & innovation. Innovation Management is a strategic enabler to achieve organisational objectives. The Company has multiple processes to identify areas of opportunity.

Tata Steel follows a two-pronged approach to innovation

First, pursue innovative ideas that lead to significant improvements in current processes, technology, products and services.

Second, pursue breakthrough or radical ideas with the potential to serve new customers, new needs or new business models, and build new competencies for the future readiness of the organisation.

Focus areas for innovation



R&D and Technology projects impact the entire value chain with the research groups working on Raw Materials, Coal, Coke, Iron and Steel-making, New Products and Product Applications as well as the Environment.

Innovation at Tata Steel focuses on optimising resource efficiency and developing high-end products.

In FY18, the Employee Experience Score on Innovation & Agility was **62%**

► A state-of-the art R&D centre in Tata Steel, Jamshedpur provides a perfect ambience for innovation & creativity



Innovation

PURSuing INNOVATIVE IDEAS

New Product Development

By leveraging the superior manufacturing capability of its Kalinganagar plant, Tata Steel has developed and commercialised the majority of the new automotive grades introduced in India in 2017-18, including those for long-term application in commercial vehicles.



Impact

Tata Steel's focus on value creation is leading to a steady rise in enriched or value added product sales.



Process Technology

Improvements and innovation in process technology are primarily directed at making the blast furnaces more efficient, as the iron making process is a major contributor to carbon emissions and wastewater discharge. Those with the greatest impact were Coke rate reduction in the blast furnaces and Smart Raking at the Steel Melting Shop.

Impact

Reductions in the Coke Rate have cut back CO₂ emission and yielded savings in costs as a result of lower fuel consumption. The carbon rate at the blast furnaces at Jamshedpur has reduced by 10 kg/tonne of hot metal.



Advanced Materials & New Business Models

To insulate revenues against the cyclicity of the traditional steel business Tata Steel is enriching its product mix, as well as developing the new Services & Solutions business, and new materials, namely as Graphene, advanced materials and composites, that hold great promise.

Impact

In the Services & Solutions business, Pravesh Steel Doors bookings have increased five times and Nest-In revenue grew by 60% over FY 2016-17.

Graphene is a new and exciting material, one of several concepts poised to grow into businesses.

A number of research and development projects have reached high Technology Readiness Levels.

Advanced analytics, design thinking and agile methodologies are being developed and deployed.

Plant Technology

The capability to develop global steel industry technology leadership is a strategic enabler for Tata Steel. In line with its Technology Roadmap, R&D and Technology projects are spread across value chain.



Impact

Twin Wagon Tippler at TSK, Copper Stave Measurement System at the Blast Furnace, Laser Marking of the Astrum brand HR Coil in High Speed High Temperature environment (a first globally) are examples of the projects implemented by the Company.



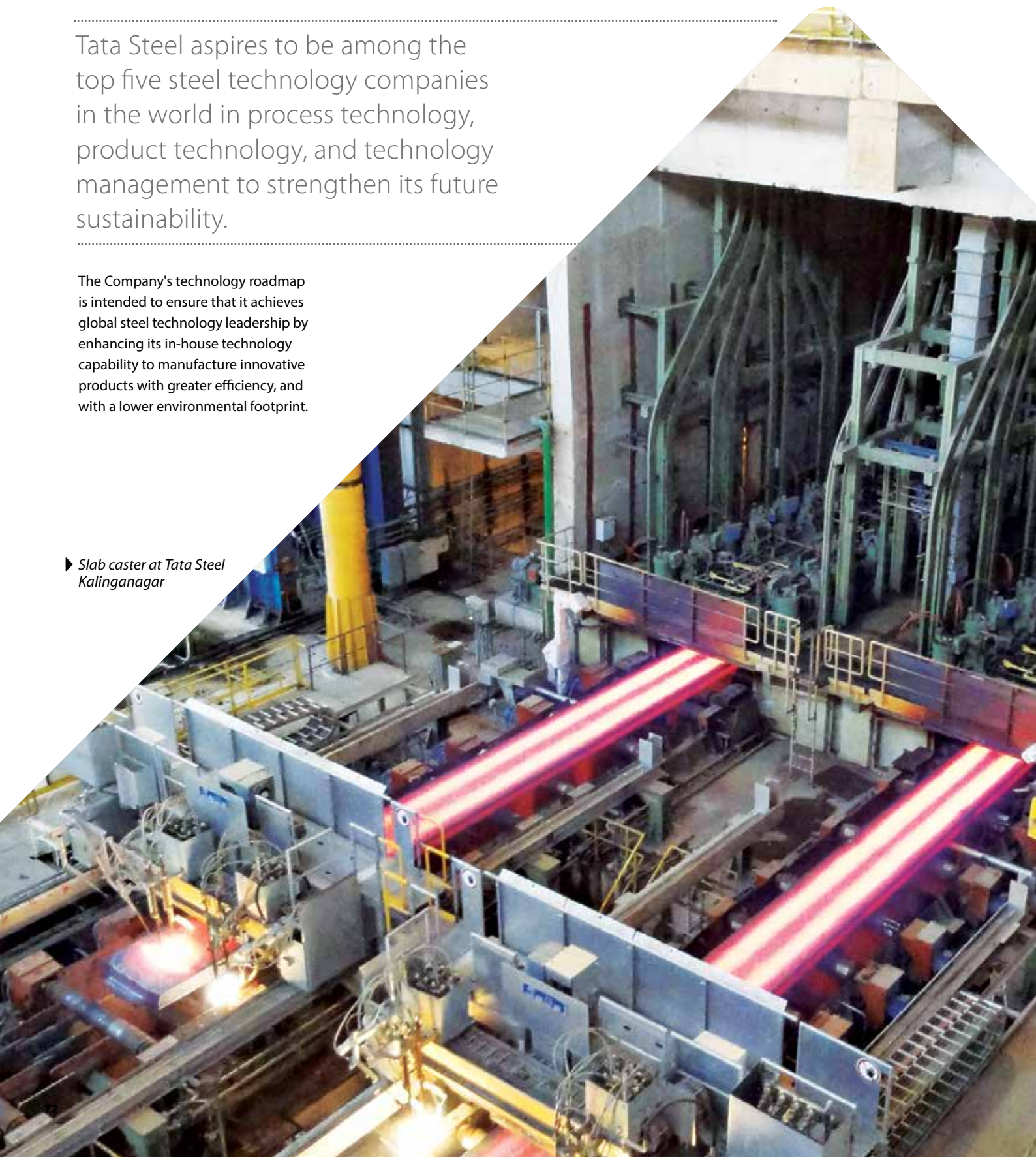
Technology

NEW AGE FACILITIES. VERSATILE OPERATIONS

Tata Steel aspires to be among the top five steel technology companies in the world in process technology, product technology, and technology management to strengthen its future sustainability.

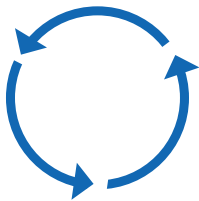
The Company's technology roadmap is intended to ensure that it achieves global steel technology leadership by enhancing its in-house technology capability to manufacture innovative products with greater efficiency, and with a lower environmental footprint.

► *Slab caster at Tata Steel Kalinganagar*



Process Improvements

The lowest-ever coke rate at Tata Steel has been achieved with the adoption of pulverized coal injection (PCI).



Impact

Tata Steel Jamshedpur is an Indian steel industry benchmark in coke rate. Use of pulverized coal technology after the ramp-up of Tata Steel Kalinganagar, reduced CO₂ intensity at the plant by 14%.



Steel Technology

The state-of-the-art Twin Wagon Tippler at the Raw Material Handling System in Tata Steel Kalinganagar is capable of handling different raw materials. It was modified to handle a wide range of wagons, adding greater flexibility in rake allocation.

Impact

It has increased rake availability and achieved faster turnaround of raw material movement.

Digital Technologies

Tata Steel embraces new technologies and enhanced IT systems for better visualisation and analysis. The Company is the first to adopt SAP HANA for a faster response time, as well as has developed apps such as DigiWheels and Rake Drishti. The MARVEL programme aims at building organisation-wide digital capability in the area of advanced analytics.



Impact

DigiWheels is a shared platform for the Company's in-plant transport vehicles, while RakeDrishti, a project with the Indian Railways, has increased visibility of rakes in a closed circuit and improved loading or unloading planning.

The Kalinganagar steel plant was designed to deliver a vast variety of products, of different width, thickness and size, demanded by customers.

Shikhar 25 programme is a multi-divisional, multi-location, cross-functional programme to continuously aim for and achieve best-in-class operational performance.

The "One IT" strategy for digital technologies is integrating Information Technology with operational processes for productivity, safety, transparency and cost optimization. The goal is to achieve greater value and enable Tata Steel to evolve into an Industry 4.0 company.

Employees

PEOPLE: OUR SOURCE OF COMPETITIVENESS

Tata Steel strongly believes that it is its people that set it apart. It is they who will make it a global steel industry leader. Hence, their capability, health & safety are its topmost priority. This focus also extends to Organisational Safety Competency & Capability Improvement, and Contractor Safety Risk Management.

The focus for the year was on gender diversity and inclusion of differently-abled persons in the workforce.

Focus areas



Capability Development

Major improvements were seen in training & development with a shift from classroom to e-learning courses on managerial and functional competencies. An exhaustive review of training programmes led to their realignment to nine managerial competencies under the Management Competency framework. They were redesigned to include a blend of facilitator-led sessions and e-learning modules.

Impact

More than 9,000 employees took advantage of the Digital Capability Programme.



Safety & Health

The nature of steel manufacturing makes the Safety & Health of the workforce a priority for all steel manufacturers. The 'Committed to Zero' programme aims to achieve Zero Lost Time Injury across all its sites. Tata Steel's Safety Management Strategy includes six key enablers.

Impact

Lost Time Injury Frequency Rate has seen a steady decline, with a 20% reduction in 2017-18. SOPs have been identified for 67% of critical hazardous activities.




Diversity & Inclusion

MOSAIC – the Diversity and Inclusion initiative by Tata Steel has defined a five-pillared approach based on recruitment, development, sensitisation, infrastructure and celebration.

Impact

Greater attention to diversity & inclusion led to increased inclusion of women, Affirmative Action community and Persons with Disabilities (PwDs) in the workforce.



TSL is focused on a ►
providing a positive
environment for women

Tata Steel's people
practices have
always aimed at
developing a culture
of care, commitment,
engagement and
harmony across
the workforce.

An upgraded
Occupational Health and
Safety System led to 12
hazard control projects
being implemented. Follow
up under the Doctor@
Doorstep programme
is being strengthened.

There has been an increase in the
percentage of women workforce
at all levels and overall from
5.21% to 6.11% and a drop in
female attrition from 9% to 6%
from FY 17 to FY 18.



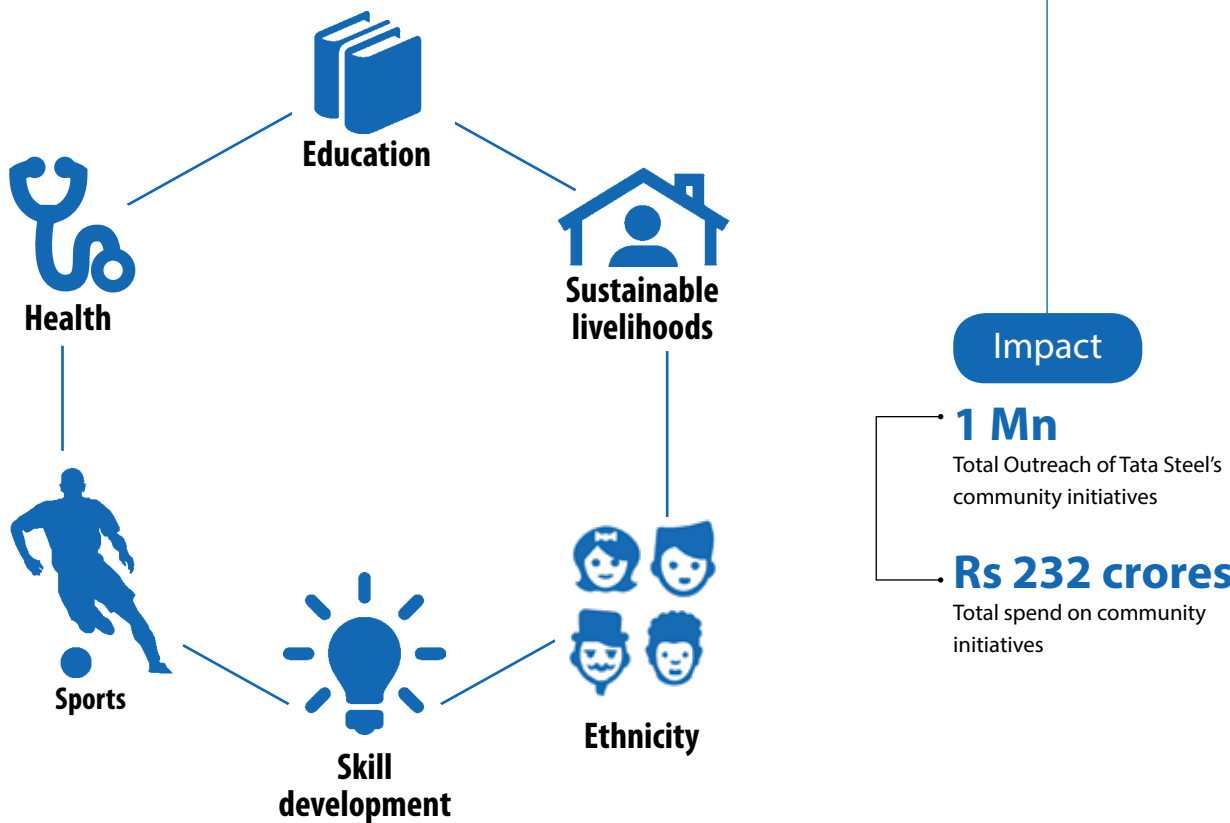
Community

GIVING BACK TO SOCIETY

The defining feature of Tata Steel’s relationship with its community has been the philosophy of holding this wealth in trust for the people, to enrich it by using it for their benefit. “In a free enterprise, the community is not just another stakeholder in the business but in fact the very purpose of its existence,” the Founder Jamsetji Tata believed.

Tata Steel is always mindful of the impact of its operations on the communities around them and has taken steps to ensure the inclusive growth of neighbouring communities.	By the very nature of its business, Tata Steel’s operations are based in the mineral rich eastern states of Jharkhand and Odisha. Both states have significant development challenges.	To meet the development needs of its communities, Tata Steel works through signature programmes, which can be scaled up or replicated in locations.
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These programmes focus on pre-determined need-based themes



NURTURING A HEALTHIER COMMUNITY



Mother & Child

Maternal & Newborn Survival Initiative (MANSI) reduces mortality among neonates and infants by enhancing the capacity of Government health volunteers (ASHAs/ Sahiyas) in the Home Based Newborn Care (HBNC) system. Tata Steel, the National Health Mission (NHM), American India Foundation (AIF) and the Society for Education Action and Research in Community Health (SEARCH) – the pioneer of HBNC in India – collaborate under a public-private partnership model to work in select blocks of Jharkhand and Odisha.

Impact

12



Blocks in the states of Jharkhand and Odisha are undertaking the journey to reduce Maternal & Infant Mortality *

61%



Reduction in Neonatal Mortality Rate (NMR) has been achieved since the inception of MANSI *

63%



Reduction in Infant Mortality Rate (IMR) has been achieved since the inception of MANSI *

*(Based on the study from the period January 1, 2015 to December 31, 2015)

Adolescents

Greater awareness offered by the Regional Initiative for Safe Sexual Health by Today's Adolescents (RISHTA) programme enables adolescents to make informed choices about their sexual and reproductive health, overall well-being as well as provides coaching on life skills and self-development. It has improved the overall health of adolescents by identifying and training peer educators among them.

A RISHTA mobile application was launched in 2017-18 to profile adolescents.

Impact

More than

700



peer educators were developed in FY 2017-18



19,601

Adolescents were empowered by RISHTA

Community Education

EMPOWERING
TODAY FOR A
PRODUCTIVE
TOMORROW

Enhancing School Education

Right to Education is the route to building the society of tomorrow. Tata Steel follows a multi-pronged strategy to improve school education. It brings school dropouts from vulnerable backgrounds back to educational institutions, and is driving improvements in the quality of education as well as governance in Government primary schools.

Regular PTA meetings are now conducted with, quality mid-day meals and active libraries are available; school projects, Bal Panchayats and children's festivals help foster all-round development of the child.

Impact



**2,00,000 children
and 2,800 habitations**

in Odisha and Jharkhand benefitted from the programme to enhance School Education. 1,165 habitations were made child labour free zones.

Residential Bridge
Schools

Children who have dropped out of school need a safe and conducive residential school environment to acquire the requisite ability, through bridge courses, to be integrated back in mainstream schools. These children from vulnerable backgrounds are linked to the formal education system through two all-girls schools and an all-boys school.



Impact

319 children from the three schools were re-integrated back into mainstream schools.



30 Model Schools

Children from Educationally Backward Blocks (EBBs) now have access to quality infrastructure. Under a Memorandum of Understanding (MoU) with the Government of Odisha, Tata Steel is constructing 30 Model Schools in 30 backward blocks of the state.

Impact

5000 rural children now have access to quality educational infrastructure at nine Model Schools constructed and handed over to the state government.





SUSTAINABLE LIVELIHOODS



Irrigation and Farm Yield

Multiple interventions to promote sustainable livelihood options among small and marginal farmers. Regular training programmes capacitate these farmers with new skills and knowledge to improve production practices. Scientific agrarian practices, System of Rice Intensification (SRI), multi-cropping, integrated cropping, etc. and allied activities are also promoted among farmers. To overcome the dependence of farmers in the two states on rain to cultivate their farms, Tata Steel has created them with irrigation facilities to help increase cropping intensity.

Impact

1 tonne/acre

Increase in paddy yield



Skill development

Discriminations lead to denial of skill development opportunities for Persons with Disabilities (PwDs). SABAL Centre for Abilities at Noamundi empowers PwDs through skilling programmes, to help them find gainful employment. It also sensitise communities against discrimination, and gives PwDs productive and dignified lives. The Centre is a joint venture between Tata Steel Skill Development Society (TSSDS) and Enable India.

Impact

28 PwDs



empowered through skill development training



15 persons

including six PwDs underwent the Training of Trainers (ToT) module in FY 2017-18



Sports: a way of life

A HEALTHY BODY, A SPORTING SPIRIT

Marathons

Tata Steel Kolkata 25K, a 25-km run promotes an active sporting lifestyle, with a social cause. A large share of the charity funds collected is donated to Tata Medical Centre, a cancer hospital in Kolkata. Tata Steel has also organised runs at Jamshedpur and Noamundi (both in Jharkhand) and Bhubaneswar (Odisha) to promote sports as a way of life.

Naval Tata Hockey Academy

Tata Steel and Tata Trust, along with Floris Jan Bovelanders (Director of 'One Million Hockey Legs'), jointly launched 'The Naval Tata Hockey Academy' to promote hockey in the state of Jharkhand. The focus of the effort is to tap the latent potential of the tribal community of the state.

Tata Archery Academy

The youth of Jharkhand have an innate ability with the bow and arrow. To identify and train talented youth a world-class ecosystem was created. Cadets also get the highest quality archery equipment every year.

Tata Steel Adventure Foundation (TSAF)

It has promoted the spirit of adventure, enterprise and leadership development since 1984.

Impact

Over 13,000

people participated in TSK25 2017 from 12 countries.



4,500

boys attended the trials for the Academy. 24 tribal boys were selected for the first batch.



Impact



127 cadets have been trained in the last 16 years

45 cadets have represented India at various levels



7 mountaineers, who were part of TSAF's expeditions, have summited Mt Everest, including Jharkhand's oldest woman mountaineer, India's first amputee and Odisha's first woman mountaineer.

3000

rural youth have attended TSAF's outdoor leadership programme

Tata Football Academy (TFA)

TFA was established in 1987 to provide a perennial pool of international quality talent to the Indian team. The Academy has trained 213 cadets, who have served the country and played for various clubs.

Jamshedpur Football Club (JFC)

Tata Steel's investment in Sports saw a quantum jump with the Company winning a bid to own a club in the Indian Super League. JFC is part of its to enhance the overall ecosystem of football, including grassroots football, youth football and women's football.

Impact



2 cadets have captained the Indian football team (in different age groups)

2 cadets have been honoured with the Arjuna Award

141 cadets have represented India

Rs 300 million invested in football to promote India's top talent.



▲ Tata Steel catches them young and provides platforms to them for honing their talents and achieve their passions

Ethnicity



PRESERVING CULTURE, CELEBRATING IDENTITIES

Tribal communities across geographies are deeply rooted in their traditional heritage, wisdom and culture, which often hold valuable insights into their identity as well as a sustainable way of life for the rest of the society. Hence, there is a need to preserve and promote this knowledge and ensure that their voices are heard. The annual tribal conclave, Samvaad, offers a platform for indigenous communities from India and abroad to discuss critical issues and showcase their heritage. Each year, Samvaad focusses

on a specific theme, centred on an area of interest for tribal communities.

Samvaad also reaches out to a wider audience among tribal communities through Regional Samvaad events organised in tribal pockets across India. Experts engaged in tribal and social development also attend these sessions. Regional Samvaads, held across the country before the annual international meet in Jamshedpur, have been a great success.

Impact



1200 delegates

attended the tribal conclave Samvaad, which went international in 2017. Representatives of tribes from Australia, Canada, Kenya and Zimbabwe attended.



400 tribal youth

representing 103 tribes from 22 states attended a structured leadership programme.

▼ Samvaad-
a glimpse





Environment Management

A CIRCULAR PHILOSOPHY

Tata Steel's value chain extends from mining of ore to the delivery of finished products to customers. Mining by its very nature impacts the earth. The steel manufacturing process uses two key inputs minerals, coal and iron ore, which result in greenhouse gases emissions and the output of large volumes of results.

Tata Steel's approach to environment management is based on the 3Rs concept - reduce, reuse, recycle, which fits in with the Circular Economy design of being restorative and regenerative.

Focus areas



**Land, Water
and Air**



**Resource
Efficiency and
Climate Change**



**By-product
Utilisation**



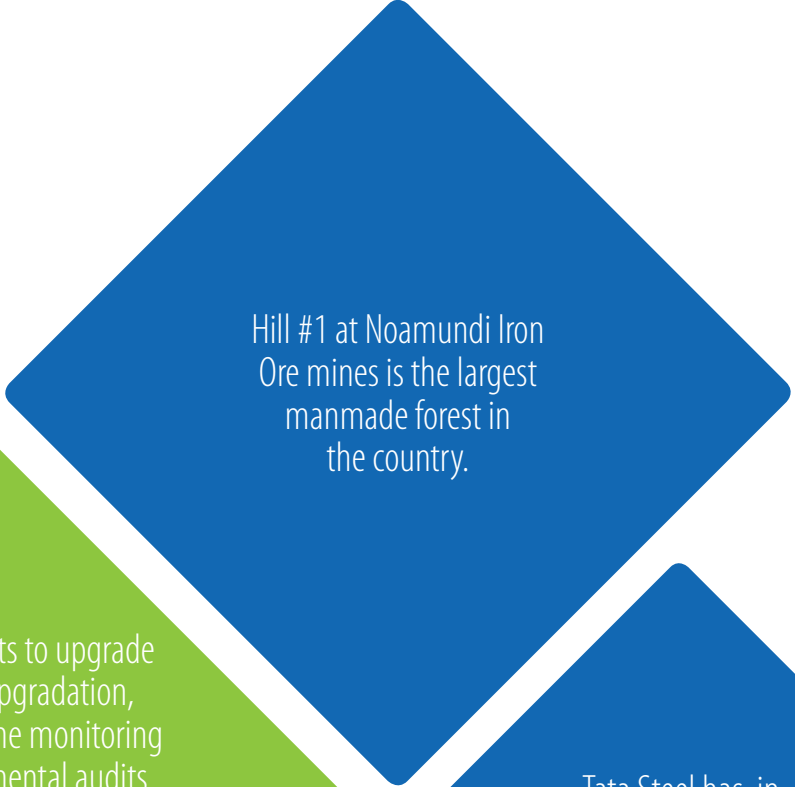


LAND, WATER AND AIR


All Tata Steel's mining sites are covered by Biodiversity Management Plans, which are being progressively implemented in coordination with International Union for Conservation of Nature (IUCN).

Capital investments at Tata Steel Jamshedpur and Tata Steel Kalinganagar, intended to ensure that cleaner technologies and equipment for dust suppression are adopted, have reduced dust emissions to levels lower than those expected from steel plants of similar capacities.

The Company aims at making all locations "Zero Liquid Discharge" facilities with the objective of reducing fresh water uptake. Multiple improvement projects and investments have reduced water intake by 35% in the last five years at Tata Steel Jamshedpur.



Hill #1 at Noamundi Iron Ore mines is the largest manmade forest in the country.



Beside investments to upgrade infrastructure, upgradation, metering and online monitoring of water, departmental audits and replacement of freshwater with recovery water in low-end applications, have had a significant impact on absolute and specific water consumption at Tata Steel Jamshedpur.



Tata Steel has, in association with The Energy Research Institute (TERI), launched the Green Project to create environment awareness among school children.

Environment Management

CLIMATE CHANGE & RESOURCE EFFICIENCY

One of the two key raw materials used in steel manufacturing is coal, which on combustion releases carbon dioxide. Tata Steel is committed to reducing the impact of its operations and carbon footprint through operational excellence, resource efficiency and continued investments in environment-related projects.



Resource Efficiency & Climate Change (CO₂ reduction)

The Company's Climate Change strategy is based on reduction and mitigation of emission, investing in technology, market opportunities, employee engagement and leading by example.

Among the projects implemented during the year was Pulverised Coal Injection plant at TSK. Projects on low-grade heat recovery and Solar Power generation were initiated at Jamshedpur.

Impact

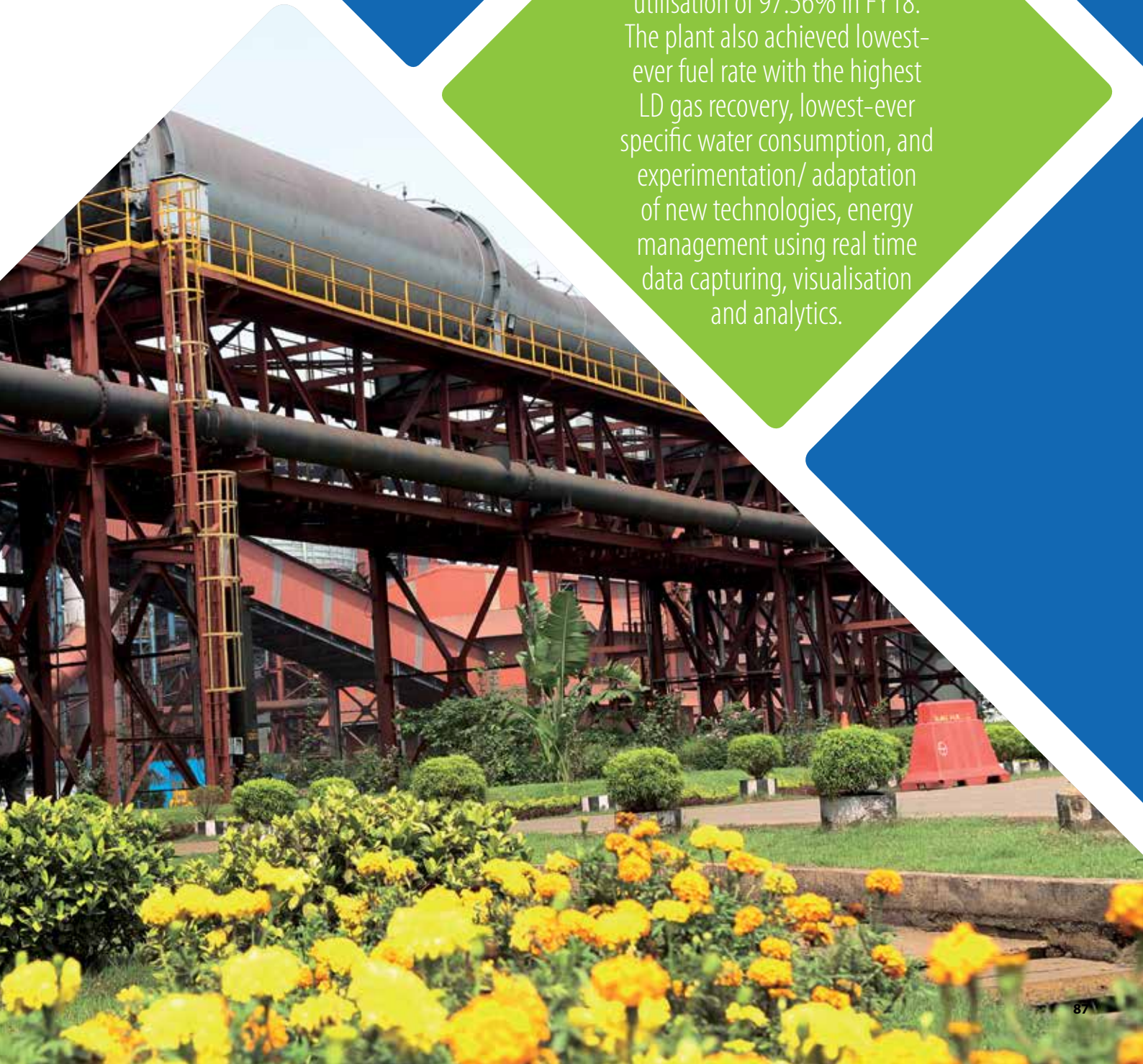
Tata Steel's sustained focus on carbon efficiency in iron making has made it a national benchmark in specific energy intensity. During the successful ramp up of Tata Steel Kalinganagar, the plant reduced CO₂ intensity by 14%.

The Company generated 37,98,022 kWh of solar power and met 18% of its fuel needs from biodiesel.



Tata Steel commissioned a 3MW solar power plant at Noamundi.

Tata Steel Jamshedpur achieved the best by-product gas utilisation of 97.56% in FY18. The plant also achieved lowest-ever fuel rate with the highest LD gas recovery, lowest-ever specific water consumption, and experimentation/ adaptation of new technologies, energy management using real time data capturing, visualisation and analytics.



Environment Management

VALUE FROM WASTE

Tata Steel established its Industrial By-product Management Division (IBMD) to further its philosophy of reduce, reuse and recycle, deliver maximum value from its industrial by-products, and further its circular economy objectives.

The product portfolio of the Division comprises steel by-products, produced in large volumes at the iron & steel manufacturing plants and coal by-products like middlings, tailings and rejects, produced at the collieries.



Mining waste

Run of Mine (RoM) Coal received from the mines is crushed and washed in the Coal Washeries, producing Clean Coal, Middlings, Tailings and Rejects. Each of these by-products has an end use. The tailings produced at Tata Steel have uniform size, flexible delivery schedules and short lead-time, attributes that give them greater economic value.

Steel Manufacturing waste

Waste from iron and steel making is processed and marketed by Tata Steel. Part of the waste is used internally but various applications are also being explored for them externally.

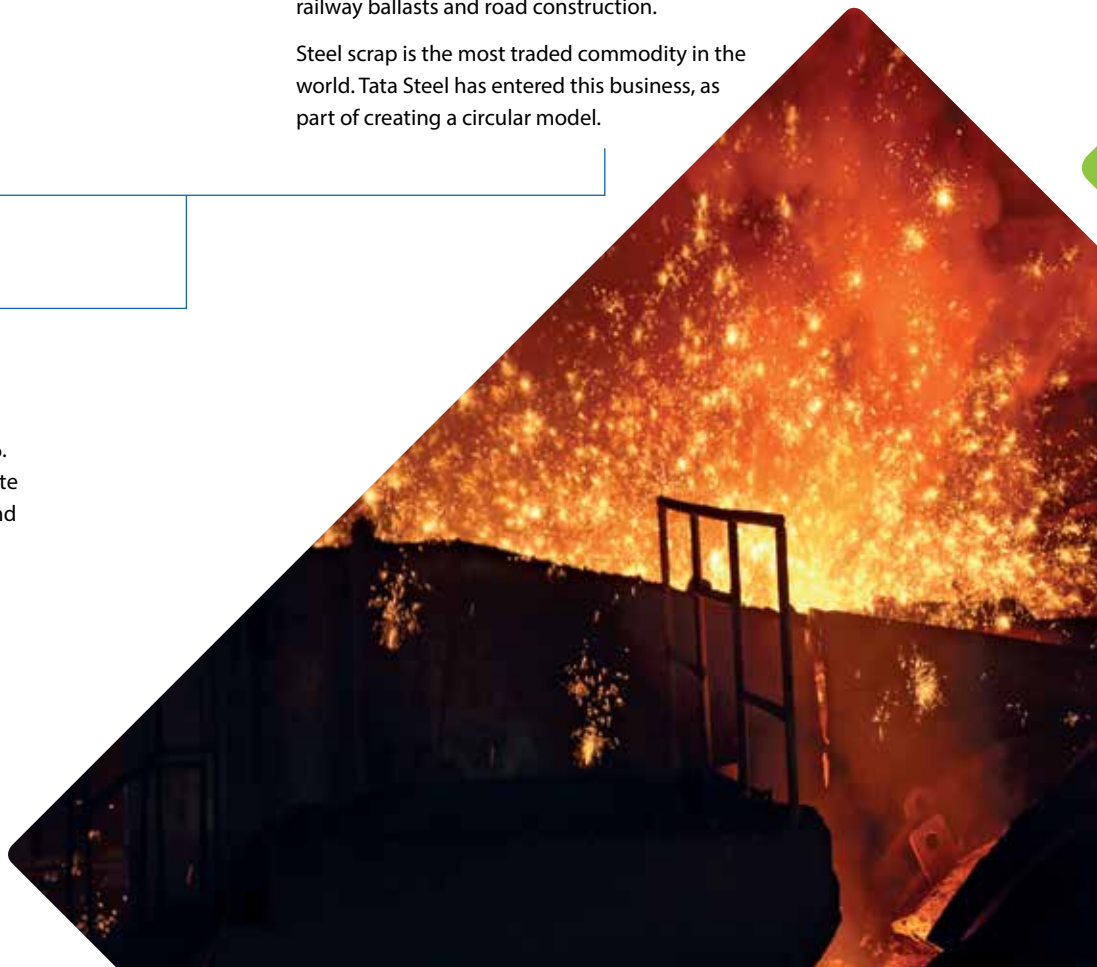
Steel making slag has found application in cement making, as a substitute for clinker, reducing CO₂ emission in clinker making. Opportunities are also emerging in road making, railway ballasts and road construction.

Steel scrap is the most traded commodity in the world. Tata Steel has entered this business, as part of creating a circular model.

Impact



The highest ever steel-making slag utilisation was achieved in 2017-18 at 59%. Maximising value from waste has enormous economic and environmental potential.





The Division has launched India's first ever branded LD Slag products, Tata Aggreto and Tata Nirman. The first ever Blast Furnace Slag was exported to Bangladesh and Tata Ferroshots to Indonesia. It is also exploring new applications for these by-products.

To demonstrate environmental leadership Tata Steel India will pursue time-bound action to reduce its carbon footprint across the value chain, to achieve zero effluent discharge, move towards being a world benchmark in specific water consumption and utilise 90% of LD Slag.

The Division earned Rs 3290 crore from the sale of by-products in 2017-18. It has been awarded Green-Pro Certification for Ground Granulated Blast Furnace slag by CII-GBC Council.



◀ Tata Aggreto

GROUP COMPANIES OVERVIEW

DRIVING
EFFICIENCY

▲ *Tata Steel Processing and Distribution Ltd company processes the hot rolled steel for various manufacturing processes*



DELIVERING IMPACT

▲ *Suvarnabhumi airport of Thailand is constructed with the steel of Tatas.*

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	Tata Pigments Limited	Subsidiary	100.00%
3	Tata Steel 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	Tinplate Company of India Limited	Subsidiary	74.96%
7	TRF Limited	Subsidiary	34.11%
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	Bhubaneswar 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%

JAMSHEDPUR UTILITIES AND SERVICES COMPANY LIMITED (JUSCO)

www.jusco ltd.com

QUALITY SERVICES FOR 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

\$141 Mn

- Established in in 2004 by converting the erstwhile Town Services Division of Tata Steel into its wholly-owned subsidiary
- Possesses expertise in integrated town management, power distribution, engineering procurement construction, real estate, and operations and maintenance
- Undertakes capital investment through public-private partnership projects for infrastructure development and modernisation



TATA PIGMENTS LTD

www.tatapigments.co.in

KEY PRODUCT

COLOURING THE WORLD

Synthetic iron oxide pigments

*ANNUAL PRODUCTION

3467 Tonnes/KL

*ANNUAL TURNOVER

\$18 Mn

- The leading brand in India for flooring colours and the only Indian manufacturer of iron oxide pigments with BIS certification
- One of the largest producers of synthetic iron oxide pigments in India. Also supplies pigments to leading companies in diverse user sectors.
- Provides complete solutions for painting requirements to key customers



*AS ON MARCH 31, 2018

TATA STEEL ALLOYS LTD. (TS ALLOYS)

www.tsalloys.com

ENSURING MANUFACTURING EFFICIENCY

Ferro alloys

*ANNUAL PRODUCTION

54787 Tonnes

*ANNUAL SALES

\$29 Mn

- Possesses a 59,400 TPA ferro alloy manufacturing facility at Anantapur, Odisha

- Spread across 143.5 acres of land, the plant has two 16.5 submerged electric arc furnaces that commenced commercial production in 2007.



**KEY
PRODUCT**



TATA STEEL PROCESSING AND DISTRIBUTION LTD. (TSPDL)

www.tspdl.com

BRIDGING THE GAP BETWEEN MANUFACTURER AND BUYER

Offering steel services

*ANNUAL PRODUCTION - TOLLING

2230 KT

ANNUAL SALES

\$490 Mn

- Tata Ryerson Ltd. (a 50:50 joint venture between Tata Steel and Ryerson Inc., USA) was converted into a wholly-owned subsidiary of Tata Steel and rechristened as Tata Steel Processing & Distribution Ltd. from January 2010.

- A dominant steel service company in India that addresses the yawning gap between steel product offered and the actual requirement of customer.

- It is setting up a one million tonne Steel Service Centre at Kalinganagar – this is part of TSPDL's Phase I development in Kalinganagar

**KEY
FUNCTION**



ADITYAPUR TOLL BRIDGE COMPANY LIMITED (ATBCL)

RAPIDLY GROWING INDUSTRIAL CENTRE

Constructing and operating a second road bridge connecting industrial towns of Jamshedpur and Adityapur in Jharkhand

*ANNUAL SALES

\$1 Mn

- Promoted under PPP model by Government of Jharkhand & Tata Steel Ltd, the Company was incorporated on March 19, 1996.

- Its authorised share capital is Rs 21.00 crores and its paid up capital is Rs 20.38 crores, Tata Steel being the major shareholder with 75% shares

**KEY
FUNCTION**



TINPLATE COMPANY OF INDIA LTD (TCIL) www.tatatinplate.com

EXCELLING SUPPLY CHAIN AND LOGISTICS SERVICES

Packaging solutions for edible and unedible products

ANNUAL PRODUCTION

355784 Tonnes

*ANNUAL SALES

\$296 Mn

- A subsidiary of Tata Steel, the Company commenced business operations in 1922.

- Manufactures versatile packaging substrates used for packaging edible and non-edible products

- Products are used for its eco-friendly and superior properties vis-à-vis other packaging substrates such as glass, paper, plastics, aluminium, etc.

**KEY
PRODUCT**



TRF LIMITED

www.trf.co.in

MANAGING RESPONSIBLY

A pioneer in solutions for bulk material handling equipment and systems, and in automotive applications

*NET SALES

\$67 Mn

KEY FUNCTION



- TRF has five key business units: Bulk Material Handling Business which manufactures equipment for bulk materials, Hewitt Robins International

Ltd (HRIL), York Transport Equipment (YTE), Dutch Lanka Trailers (DLT) and Tata International Ltd - Dutch Lanka Trailers.



TATA SPONGE IRON LIMITED (TSIL)

SUSTAINABLE MANUFACTURING

KEY PRODUCT

Sponge iron manufacture

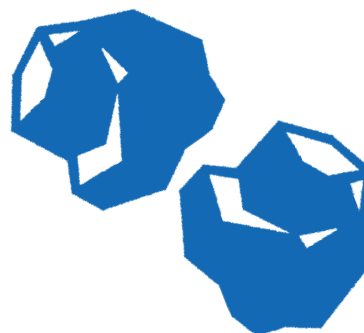
ANNUAL PRODUCTION

417094 Tonnes

*ANNUAL SALES

\$123 Mn

- A benchmark among the coal-based sponge iron plants.
- The only debt-free, dividend-paying sponge iron company in India.
- The first company to receive the integrated certification of ISO-9001, ISO 14001 & OHSAS 18001 company in India.



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

JAMSHEDPUR CONTINUOUS ANNEALING AND PROCESSING COMPANY PVT LTD (JCAPCPL)

ENABLING LOCALISATION

High-grade automotive cold-rolled steels

ANNUAL PRODUCTION

496101 Tonnes

*ANNUAL SALES

\$194 Mn

**KEY
PRODUCT**

- A joint venture between Tata Steel (51%) and Nippon Steel & Sumitomo Metal Corporation (NSSMC, 49%).
- Located within Jamshedpur Works, the operating facility has an installed capacity of 600,000 TPA.
- State-of-the-art technology caters exclusively to India's growing demand for cold rolled steels in the automotive segment.

TM INTERNATIONAL LOGISTICS LIMITED (TMILL) www.tmilltd.com

EXCELLING SUPPLY CHAIN AND LOGISTICS SERVICES

Providing port logistics support and solutions

*ANNUAL SALES

\$90 Mn

- Incorporated as a joint venture company between Tata Steel and IQ Martrade of Germany to provide cost-efficient port-related services.
- Provides wide range of logistics services, comprising port operations, shipping, freight forwarding, customs house agency, inland logistics, warehousing, ship agency services and marine services.

**KEY
FUNCTION**



*FY 2017-2018





TATA METALIKS LIMITED (TML)

www.tatametaliks.com

ADDING VALUE

High-grade automotive cold-rolled steels

ANNUAL PRODUCTION

**499540 HOT
METAL TONS**

*ANNUAL SALES

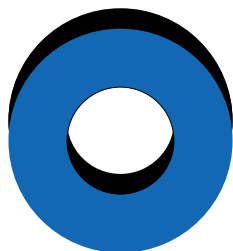
\$287 Mn

**KEY
FUNCTION**

- A listed company and subsidiary of Tata Steel (holding 50.09%) with operating facilities at Kharagpur, West Bengal

- About 70% of its production is converted into foundry-grade pig iron; the company enjoys a leadership position in foundry-grade pig iron

- The balance is transformed into molten metal for value addition into ductile iron pipes by its 100% subsidiary, TMDIPL.



**KEY
FUNCTION**

MJUNCTION SERVICES LTD.

www.mjunction.in

THE WORLD'S LARGEST STEEL E-MARKETPLACE

The sale of secondary steel online

*ANNUAL SALES

\$31 Mn

- Incorporated in 2001 as a 50:50 joint venture between Tata Steel and SAIL the Company is headquartered in Kolkata.

- It is the world's largest e-marketplace for steel with nearly 180,000 partners, buyers, sellers and influencers.

- Operates out of eight business units and employs more than 800 persons across India.



S&T MINING CO PVT. LTD.

www.stmining.com

EXPLORING OPPORTUNITIES IN MINING

Optimising and exploring opportunities in mining

- A 50:50 joint venture of SAIL and Tata Steel the Company operates in the coking coal and mineral space domestically and internationally
- It is engaged in 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



**KEY
FUNCTION**



TATA BLUESCOPE STEEL LTD.

www.tatabluescopesteel.com

CREATING A NEW WORLD IN STEEL

Coated steel, steel building solutions and related building products

ANNUAL PRODUCTION

164530 Tonnes

*ANNUAL SALES

\$274 Mn

- An equal joint venture between Tata Steel and BlueScope Steel which operates in the SAARC region with operating facilities in Chennai, Jamshepur, Pune and Bhivadi.
- Its Coated Steel Business Division and Building Products Division have developed multiple brands that are leaders in their segments.

KEY BRANDS

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

**KEY
PRODUCT**



KEY FUNCTION

TATA NYK SHIPPING PTE LTD

www.tatanykshipping.com

ENABLING EFFICIENT TRADE AND TRANSPORT

Managing supply chains

*ANNUAL TURNOVER

\$235 Mn



- A 50:50 joint venture of Tata Steel and NYK Line – one of the largest shipping companies in the world.
- Possesses 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.



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

JAMIPOL LTD.

www.jamipol.com

DRIVING QUALITY

Desulphurising compounds used in the external desulphurisation of hot metal (liquid iron)

ANNUAL PRODUCTION

59805 Tonnes

*ANNUAL SALES

\$38 Mn

KEY PRODUCT

- A joint venture between Tata Steel (42%), SKW Stahl-Metallurgie, Germany (30%) and TAI Industries and associates (27%)
- Products are certified to Integrated Management System (IMS) for three major international standards – ISO 9001:2008, ISO 14001: 2004 and OHSAS 18001: 2007.



Vision



Technology Leadership

Adopt new technologies, both in terms of product development and process efficiencies



Diversity and Inclusion

Have at least 20% women in workforce and continue to uphold our ethos of being an equal opportunity employer



Safety

Build leadership's competency improve contract worker safety management and all other processes to ultimately reach our goal of Zero LTL



SCALE

Scale-up Services and Solutions

Ramp-up and stabilise our new operations and continue our efforts towards developing value added services and products.



Climate change strategy

Reduce specific water consumption and CO2 emission and continue to increase resource efficiency



Digitalisation

Realise value and improve stakeholder experience



www.tatasteel.com

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