TATA STEEL
WeAlsoMakeTomorrow

TATA

CASE STUDY

2025

steel-a-thon
Prove your Metal
Season XII 2025

TATA STEEL
WeAlsoMakeTomorrow

TATA

Case Title

Shaping the Shift: Enhance Tata Tiscon's premium positioning during the transition to scrap-based EAF rebars in North India

steel-a-thon
Prove your Metal
Season XII 2025

INTRODUCTION:

Tata Tiscon is transitioning a share of its rebar portfolio from blast furnace (BF)–based "virgin iron ore" routes to Electric Arc Furnace (EAF) routes using high-quality scrap. InNorth India—where many buyers are accustomed to secondary scrap-based bars—EAF products risk being perceived as "scrap-based" too, even though EAF is an advanced, tightly controlled process and aligned to national green-steel frameworks and international sustainability norms.

Market size of North India is 300 KT per month and Tiscon has 17% Market share today.Major competition in North is Kamdhenu (18%), Rathi(17%), Jyoti(5%) from Secondary players. Among primary players, JSPL (6%) , JSW (4%) and SAIL(3%) are major competitors. Tata Tiscon is planning volume scale-up from 0.6 Mn tonnes/year (current sales per year in fy26) to 1 Mn tonne/year by Fy-28.

Guiding Questions

·What factors drive the entrenched bias against scrap-based rebars in North India? Prioritize the top 3–5 root causes by impact on willingness to pay.

·What specific evidence (process controls, metallurgical properties, certifications, plant pedigree, QA/QC, consistency) will an IHB and influencer accept to view EAF rebars as premium?

·How should Tata Tiscon re-frame its historic "virgin iron ore" equity into a future-facing narrative without diluting trust or creating cognitive dissonance? ·Which parts of the buyer journey most require de-risking (awareness, consideration, site-level trials, post-pour reassurance)? Propose experiments to remove perceived risk.

BACKGROUND:

Historically, in the Northern retail market, secondary players (scrap-based) dominate volumes and often sell at discounts versus integrated "primary" brands. Tata Tiscon has built a premium positioning on quality, reliability, and brand trust. With an EAF-based green offering, Tata Tiscon must not only protect its premium but also try to fetch premium whiletackling the "scrap = inferior" heuristic.

Guiding Questions

·Map key competitors in North India (IF/EAF/BF) by process, grade, pricing stance,and claims (e.g., "green", "corrosion-resistant", "earthquake-safe"). Where are the narrative gaps?

·What proof points will convince influencers (architects, site engineers, structural consultants) that EAF bars meet or exceed required standards across heat/lot consistency and mechanical properties?

·Identify the most credible third-party validators (labs, codes, standards, councils)and the artifacts they issue (test reports, EPDs, LCAs, QR-traceability) that reduce skepticism.

·Which legacy Tata Tiscon assets (distribution channel, influencer programs, consumer facing initiatives, service) best carry over, and which need redesign for anEAF/green context?

PROJECT SCOPE/CONSTRAINTS:

Market Focus: North India Individual home builders(IHB) catchment for the upcoming EAF plant (e.g., Punjab, Haryana, Rajasthan, Himachal, Jammu).

Constraints to Assume for the Case:

·Regulatory compliance and truthful environmental claims; no greenwashing.

·No compromise on BIS/IS standards or product grades; quality parity or better must be demonstrable.

Guiding Questions

·Define the precise geography and IHB micro-segments to prioritize. What criteria determine "EAF-readiness" of a district/town?

·Where will you reallocate spend (push vs. pull, ATL vs. BTL vs. influencer, digital vs. on-ground) to deliver maximum uptake.

CRITICAL PROBLEM TO BE SOLVED:

1. **Overcoming scrap-based bias while protecting premium positioning**

o What is Tata Tiscon's sharpest problem statement in consumer language? Draft 2–3 variants and the counter-evidence each demands.

o Which combination of "process superiority" (EAF), "performance proof" (lab/onsite), and "brand trust" (traceability, warranty, after-sales) would unlock premium willingness to pay?

o Design a pilot trial-to-advocacy funnel (from site trials to public testimonials) that can scale across North.

2.**Building a distinctive, defensible Green positioning**

o What should be Tata Tiscons positioning (Green or Continue with current positioning) ?

o What ownable pillars (e.g., verifiable carbon intensity, EPD/QR at heat-level,circularity programs, green financing tie-ups) can Tata Tiscon claim that copycats cannot easily replicate?

o How should claims be expressed (language, icons, labels) to be both compliant and meaningful to IHBs and engineers?

o What post-sale programs can be planned with IHBs by the brand?

3.**Expanding the influencer universe beyond Architects/Masons/Contractors**

o List and prioritize new influencer cohorts (e.g., structural engineers, IGBC/GRIHA professionals, green-home financiers, real-estate RWA leaders, civil faculty/student bodies, home-improvement creators, local building inspectors/approvers) by ability to drive spec-in or preference.

o What tailored value-props, content, and incentives (non-monetary preferred) would convert each cohort into sustained advocates?