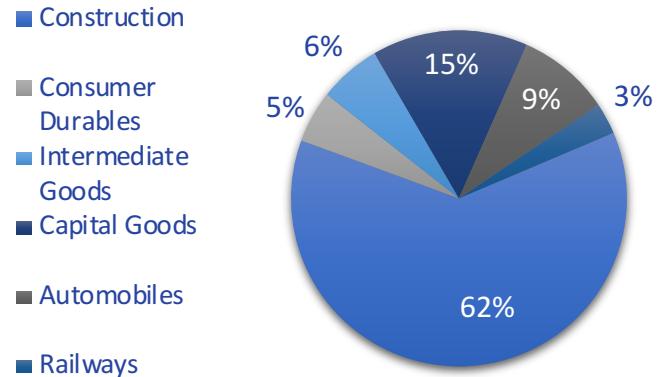
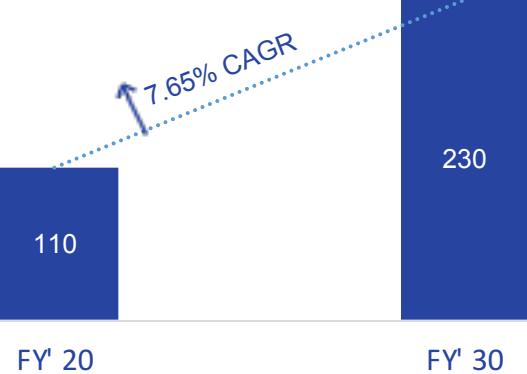
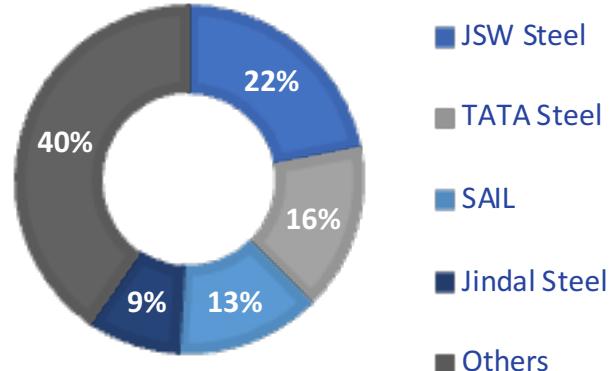
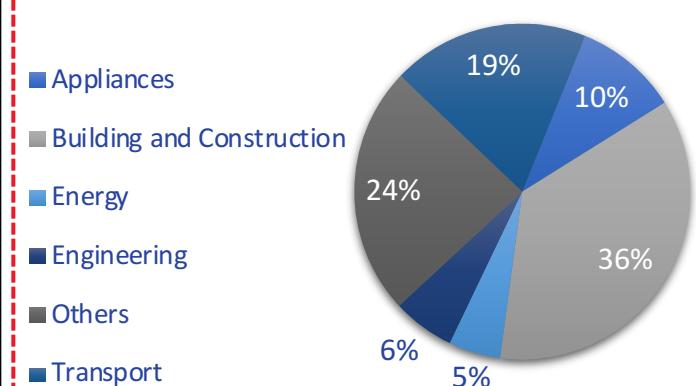
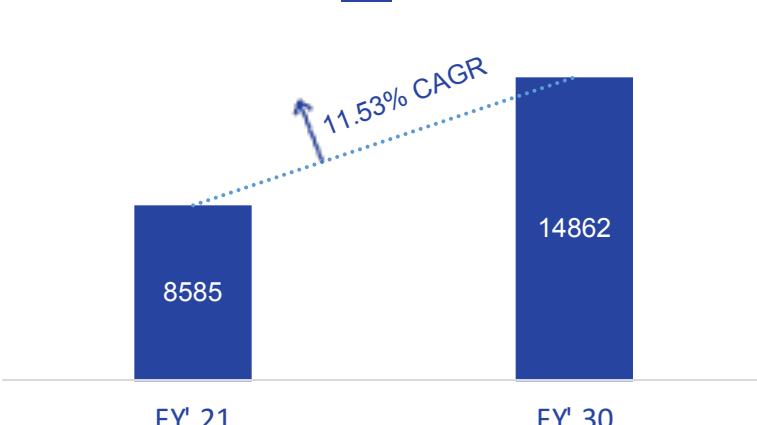
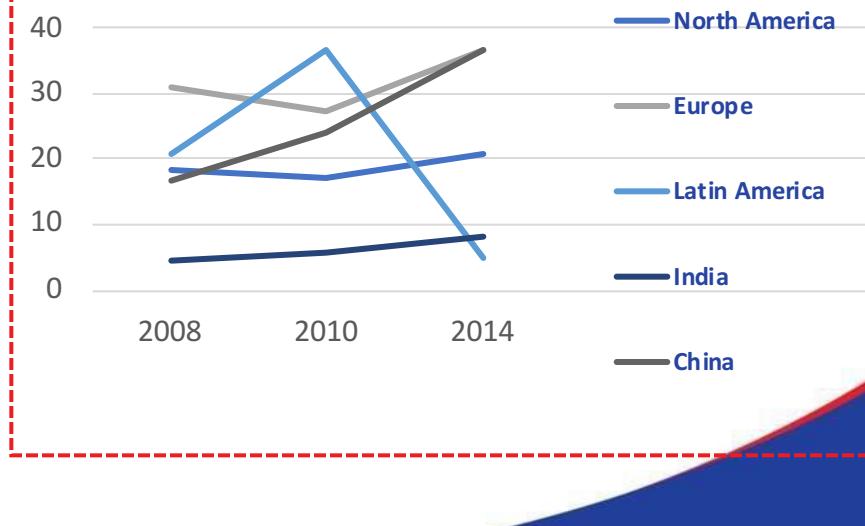




The **JSW**
Challenge
2021

National Semi Finals

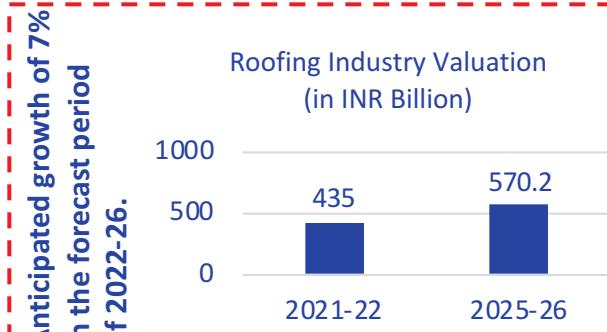
Team PAOer | IIM Shillong
Akshay Kalsi, Priya Jain and Ojasvi Agrawal

Sector-Wise Demand for Steel (2020)Projected Growth in Demand of crude steel (India)Steel Market Segmentation by CompaniesCC Sheets ApplicationsProjected Growth of Global Roofing Market SizeConsumption Growth rates in Coated steel sheets

Market Trends



Industry Growth



Innovation

The technological advancements and the **introduction of new roofing technologies** are likely to be the major factors driving the roofing market growth in India.



Increasing Investment

Recent investments by the government and the international institutions like New Development Bank, Asian Development Bank, World Bank will help in boosting the infrastructure sector.

Thriving urban construction sector in India by the government, coupled with increasing rural disposable income.

Perceptual Mapping



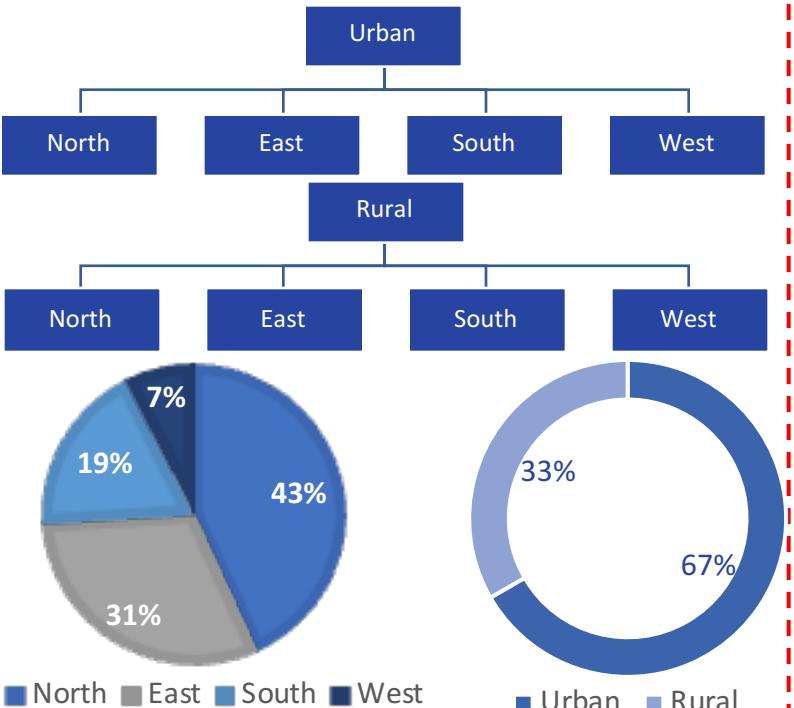
According to the market research, customer prefer the features like Durability, Aesthetics, Strength, Longer Life and Better Value in their roofing choices.

The CC Sheets possess all these features which makes it fall in the High Quality category along with RCC.

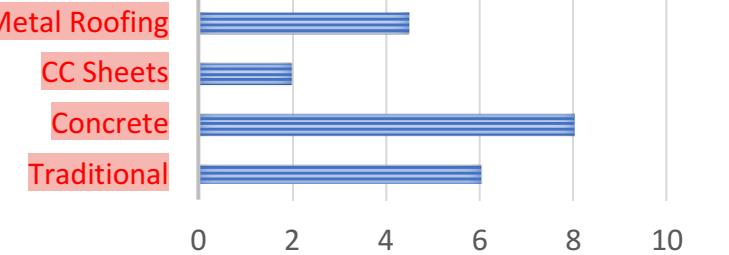
The cost of RCC roofing goes at a higher scale, which makes CC sheets the most preferable roofing material with a Lower Price.

1 2

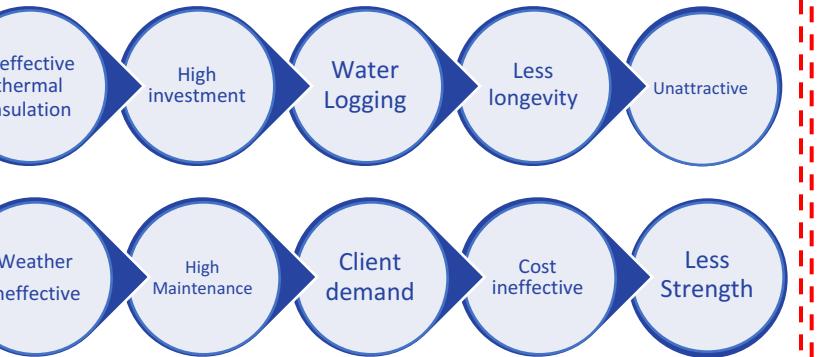
Customer Segmentation



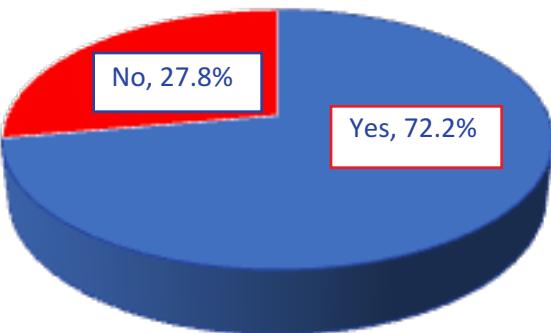
Current Roofing Preference



Pain Points of Roofing Segments



Willingness to shift to better alternatives



Feature Rating of Roofing Choices



1

2



Anjali, 35

Owes an
Architecture firm
with 5 other
employees

Current Roofing Choices

Clay Tiles
Concrete RCC

Pain Points

Traditional roofs don't suit the client demands at times

Very high cost of making concrete ceilings.

Reduces the scope of creating better aesthetics

Reason for current choices

Culturally viable

Geographically suited

Ease of access



Rahul, 29

Purchased a new
plot of land in a
posh society and wants
to build a beautiful
house.

Current Roofing Choices

Clay Tiles
Metal Roofs
Cemented Ceiling

Reason for current choices

Peer Influence

Easily available

Geographically Suited



Harish, 43

Real Estate
Builder with
contracts across
Tier-1 and Tier-2
cities.

Current Roofing Choices

Concrete RCC
Metal Roofs
Slate Tiles, Clay Tiles

Pain Points

High cost and labor intensive work for concrete RCC roofing.

Metal roofs get corroded very easily leading to frequent damages.

Not very attractive to look at and less scope of better aesthetics.

Reason for current choices

Future Expansion Prospect

Age old Practices

Solid and strong structures



Inder, 48

Constructor at
an Infrastructure
MNC responsible
for large scale
projects

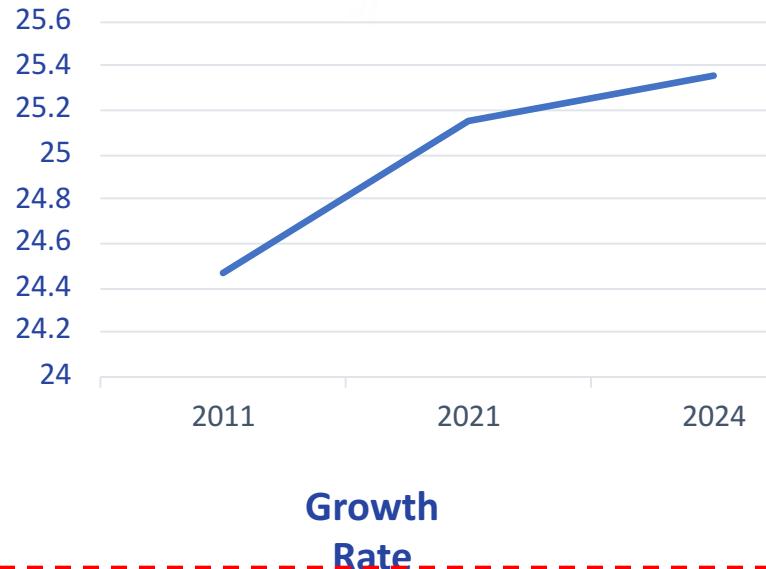
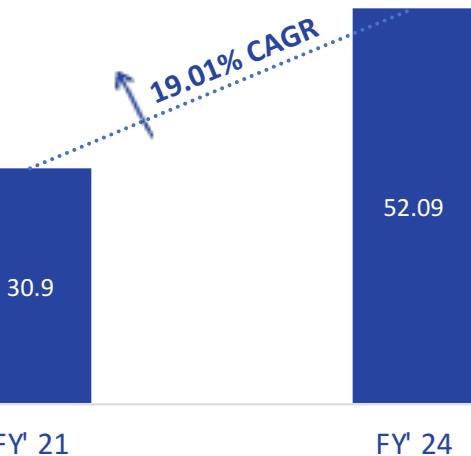
Current Roofing Choices

Clay Tiles
Metal Roofs

Reason for current choices

Readily available

Cost affective

Growth in the Number of Households (in Cr.)**Growth in Warehousing Sector****Growth In Housing Sector****Growth**

Total Houses in 2016 (Mn)

248

Total Houses in 2011 (Mn)

244.6

Average size of a Indian house (Sq m)

46

Growth in 5 Years (Mn)

3.4

Multiplication Factor (Growth Projections 2021)

1.028

Multiplication Factor (Growth Projections 2024)

1.036

Average Weight of CC Sheet (0.5mm) (kg/sq m)

10.75

Weight of New Demand Created (Lac mt)

7.72

Conversion rate % Assumed for CC Sheets

35

Total Growth for CC Sheets

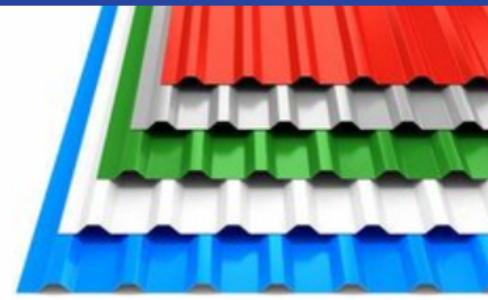
2.702

Growth In CC Demand	In Lac Metric Ton
Rise in Households Demands	2.70
Rise in Warehousing Capacity	1.57
Total Growth	4.28
% Growth for CC Sheets Market	20.56

**Growth in CC Demand**

Brand Leverage

JSW CC Sheets



Coronate your dream home with **beauty and strength**

Available in variant vibrant shades



Better Aesthetics

Longer Life

Superior Technology

Durability

Thermal Efficiency

Better Value

Easy Maintenance



Anti- Corrosion



Weather Protection



Strength



Superior Paint Technology



Stringent Quality Tests

Competitor Matrix

JSW Competitors

Benefits

TATA BlueScope

Everest Industries

Bansal Roofing

Hindalco Ind Ltd.

Aesthetics

Superior Technology

Thermal Efficiency

Easy Maintenance

Longer Life

Durability

Better Value

✓

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JSW is the Largest Color Coated Steel Producer in India.

JSW is India's first licensed Galvalume Producer.

JSW has the largest integrated special alloy steel plant in India.

JSW is India's first ISI certified coloured-coated sheets.

Re-Branding and Positioning

The Will Of Steel

Reframe 'Steel': Steel (noun) to Steel (verb).

Steel (n): Metal, cold, emotionless, strength as a specification

Steel (v): Emotional, inspirational, a belief system that gives strength to endure and persevere

Creative articulation

JSW Steel = Strength within: The Will Of Steel

"Where others see walls, I see doors" – O.P Jindal

Mobile Van on Display

(for semiurban and rural sector)

Category Penetration



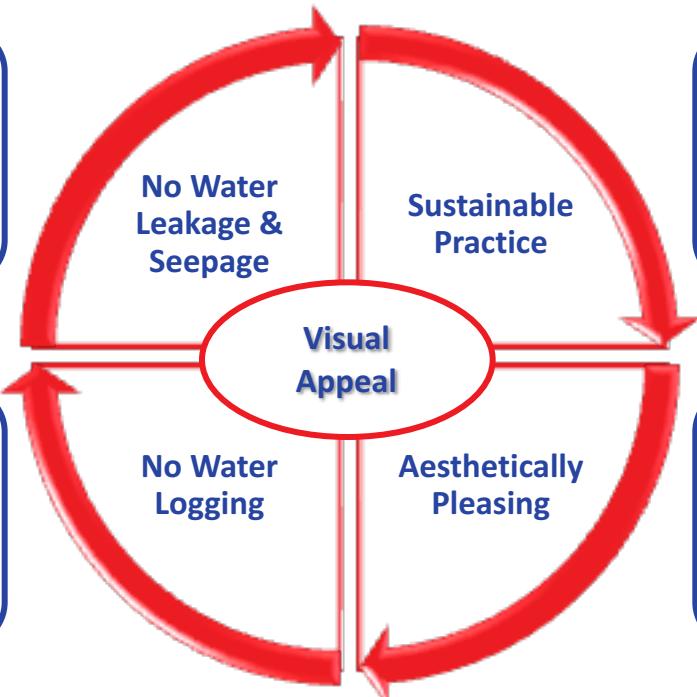
Mobile Van on Display with a House-Shaped Structure with JSW CC Sheets at the roof-top

This helps for instantaneous activation and visual touch points

Consumers will be able to realise the use of CC Sheets because of the Visual Appeal



- ✓ End Consumers will be able to physically check and enquire about the **answer to pain point of leakage** which is faced frequently in traditional roofing systems like clay tiles and asbestos sheets
- ✓ Colour does not wash or fade way with time due to seepage and hence has a **longer life**



- ✓ Market Acquisition & Consumer engagement towards contribution in Sustainable Construction Practices
- ✓ Use of RCC and Clay tile roofing needs Cement in huge quantities which results in the huge CO₂ production while use of CC sheets will be a **Sustainable practice**

- ✓ Effective in disaster prone regions and places with heavy rainfall as **inclined roofing's** will prevent water logging and hence re-work and damping's
- ✓ **Easy for Maintenance** as it is all weather effective and requires **low investment** for implementation

- ✓ Variety of Colours **adds to the aesthetics** to the newly built houses and give them a visual appeal
- ✓ Consumers will be able to form an **imagination** and have the **realization** of how their abode will look like
- ✓ **Rise in Demand** for temporary houses and tents where tourism is prevalent because of **aesthete**

Category Penetration



Canopy and Temporary structures building like Mobile Police Booth, Traffic Booths, Pandals for festivals

Colourful JSW CC Sheets all over for Greater Visibility

Boost in the usage of sheets in Commercial Sector

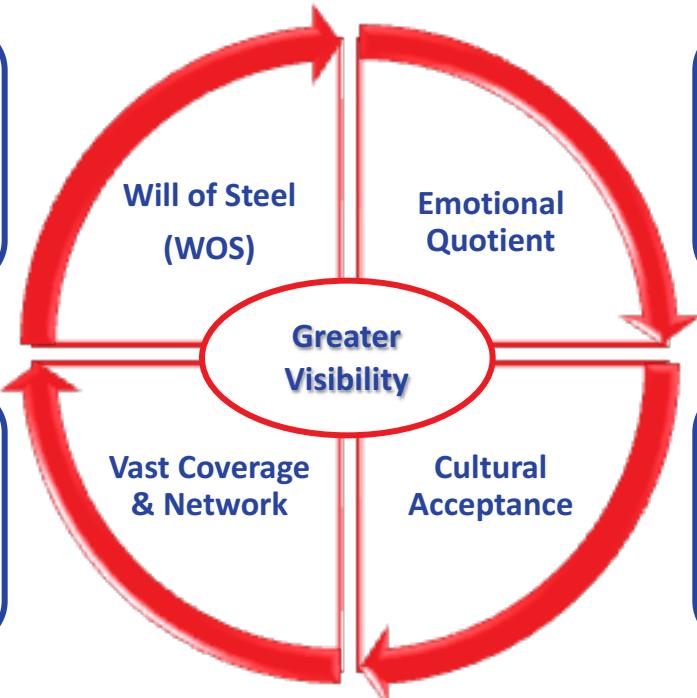


- ✓ Usage in Traffic Booths and Mobile Police Booths for people to **believe in the brand**
- ✓ Leveraging the will and strength of policemen and coagulating it with the **Will of Steel (WOS)** of JSW
- ✓ Venture in large contracts with state governments gripping the indomitable spirit of the police

- ✓ **Collaboration** with states and for pandals and setups during festivals like Durga Puja in West Bengal, Ganesh Utsav in Maharashtra
- ✓ Associate the brand with the **emotional value and influence** the influencers who spread the word of mouth

- ✓ Booths present at each Chouraha & Nukkad, hence provides the required **touch points & visibility**
- ✓ Reaching out to the people who mattered; **protecting those who protect us**
- ✓ The brand has to be felt; one should **feel the steel in their nerves**

- ✓ Coloured sheets will fulfil the **cultural aspirations** of the regions who are relating themselves with particular colours
- ✓ Collaborations during festivals will impact the normal consumers as well resulting in **increment of sales from dual consumers** because of aesthetic appeal



Large Commercial Establishments

Brand Penetration



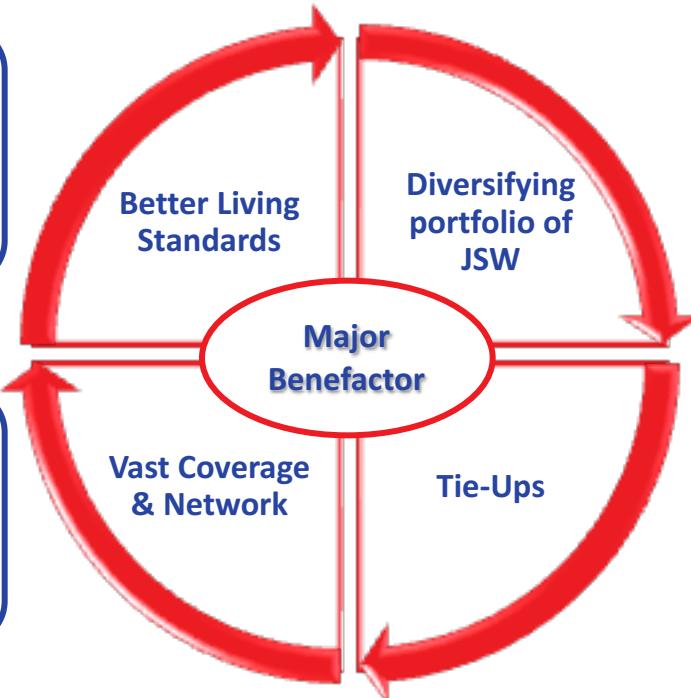
Targeting Multi-crore projects by larger manufacturing and construction firms for their Labour Camps and temporary establishments.

Thrive in the Infrastructure sector leading to increasing disposable rural population at project sites.

Boost in the usage of sheets in Commercial Sector for industrial purposes



- ✓ Improved **Quality of life** for Workers and Blue-Collar Staff working at the Project Site
- ✓ **Risk-free stay** during the entire course of projects
- ✓ **Improved productivity** because of the improved happiness quotient of the workers



- ✓ **Collaboration** with Governments of flood prone states for helping them with temporary setups in times of need as part of their **CSR activity**
- ✓ This will strengthen the confidence in general consumers about the **goodwill of the brand** and hence increasing its value and market share

- ✓ Booming infrastructure sector across the country contributing to the **increment** in disposable population
- ✓ **Tie-ups with conglomerates** namely L&T, Reliance, TATA etc. working in this sector

- ✓ Tie-ups with E-Commerce and FMCG giants helping in the **expansion of their warehousing capacities**
- ✓ Incentives for bulk purchases as **warehousing grows at an annual rate of around 9%** over the next 5 years
- ✓ Growing no. of factories, poultry farms, and development of SEZs



Thank You!