

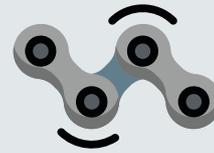
## ABOUT US

# Who we are and what we do

Tata Steel is the largest primary steelmaking company in the UK. Our steelmaking operations run 24 hours a day, seven days a week, 365 days a year. That's nearly **9,000 tonnes of quality steel every 24 hours** which is used by our customers to create everything from cars to buildings to food-safe packaging.

Our Port Talbot-made steel is used in the construction of renewable energy projects like offshore wind farms, it helps lorry makers reduce weight and improve fuel efficiency and it is used to make the motors in electric vehicles.

Best of all – all our steel is **100% recyclable** so when you have finished with it we can make it into new steel products!



We provide a vital foundation for many of the country's **key strategic supply chains**.



Tata Steel has **invested nearly £1.5 billion** in its UK business in the last decade.



Tata Steel is the only UK steel company with significant domestic **R&D activity**, with research facilities in Warwick and Swansea universities.

Tata Steel is a key driver for **regional economic growth** in the areas where it is based and a source of prosperity and opportunity for local communities.



## Key numbers



**8,000**

Employees



**250+**

Apprentices/graduates

**40%+**

of Tata Steel's sales are differentiated products, not available from the majority of other European steel manufacturers

**55**

engineering doctorates sponsored

**1,600°C**

the temperature of our liquid iron when it comes out of the Port Talbot blast furnaces

**PRODUCTION:**

**3.2 million tonnes (2020-21)**

**61,500 tonnes a week**

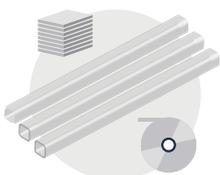
**270,000 tonnes a month\***

\*more than the weight of the world's biggest cruise ship Symphony of the Sea (228,000 tonnes)



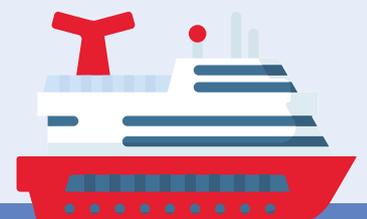
**£2.6bn**

a year in revenue/turnover  
Year to March 2021



**60,000**

unique grades and dimensions of steel made and supplied



# Sustainability

**Like all European steelmakers we have been working on reducing our CO<sub>2</sub> emission for years, both directly produced and those from our supply chains.**

We have taken the current blast furnace steelmaking technology to the very edge of what is possible – now we need step-change technology which will allow us to decarbonise rapidly while still maintaining the vital supply of high-quality steel to society which will allow it to decarbonise too.

That is why we are exploring a number of possible options which would change the face of our steelmaking, allowing us to achieve the UK Government's CO<sub>2</sub> ambitions as well as our own of being net-zero by 2050 at the latest.

We are now at the stage where we are beginning detailed feasibility work on some of these step-change technology options. We are also closely collaborating with our partners in academia.

We do not yet know exactly what our steelmaking operations will look like in years to come – there are still lots of unanswered questions around energy supply, raw material supply and the capture and possible use of our by-products to consider.

Whichever option is finally settled on it will mean great opportunities for our UK steelmaking operations. The chance to be world leaders in decarbonisation and meet the huge growth in demand for green steel, while also revitalising a crucial strategic industry.

## Markets

### KEY FACTS & BUSINESS UNITS

#### TATA STEEL'S CONTRIBUTION TO THE UK ECONOMY 2020-21

INVESTED **£11M** IN R&D IN THE UK, INCLUDING IN THE DEVELOPMENT OF ZERO-CARBON BUILDINGS WHICH RUN OFF **100% SUSTAINABLE ENERGY**

PURCHASED ABOUT **£1 BILLION** OF GOODS AND SERVICES FROM MORE THAN **3,000 UK BUSINESSES** LAST YEAR

EXPORTED ALMOST **£700M** WORTH OF STEEL AROUND THE GLOBE

EMPLOYEES' **AVERAGE SALARY** IS **36% HIGHER** THAN THE UK AVERAGE

CONTRIBUTED **£54M** IN TAX TO THE UK IN 2020-2021

SUPPLIED ALMOST **50% OF FLAT STEEL** REQUIREMENTS TO UK CAR MAKERS, AND PLAYING AN ESSENTIAL ROLE IN THE TRANSITION TO ELECTRIC VEHICLES

CONTRIBUTED **3% OF TOTAL WELSH ECONOMIC OUTPUT**, MAKING IT THE LARGEST PRIVATE SECTOR CONTRIBUTOR TO ECONOMIC OUTPUT IN WALES

### KEY MARKETS

#### AUTOMOTIVE



**Automotive represents 35% of the company's sales (by revenue).**

Tata Steel's UK business supplies almost 50% of UK carmakers' steel requirements – including body panels, chassis components and wheels.

The company supplies high value automotive steels to manufacturers like BMW, Nissan and Jaguar Land Rover in the UK, as well as to customers in mainland Europe and elsewhere.

Tata Steel supplies around a million tonnes of steel to carmakers. This is predicted to increase in coming years as carmakers move to electric vehicles following a downturn in sales during the coronavirus pandemic.

The company has world-class manufacturing and distribution capability in Wales and the West Midlands.

#### CONSTRUCTION



**Construction represents 44% of the company's sales (by revenue).**

Tata Steel's UK business supplies a range of advanced steels for the construction industry, including insulated panels, facades, structural roof and floor decking and pre-finished steel products for wall and roof cladding systems.

Each year we supply more than 1.3 million tonnes of steel into the construction sector.

The company's products play a huge part in sustainable building projects and can significantly reduce energy use.

Colorcoat Renew SC® for example converts solar radiation to usable heat energy. The company's steel supports some of the world's most sustainable buildings, including the Heron Tower in London.

#### PACKAGING



**Packaging represents 10% of the company's sales (by revenue).**

Tata Steel's UK business supplies steel worldwide to manufacturers of food and beverage cans, as well as paint and aerosols containers. Products include the innovative Protact® laminated steel which locks in food's freshness.

In the UK we supply more than three-quarters of the steel used to make cans and tins.

Steel is the most recycled packaging material and can be used and recycled infinitely with no loss of quality.

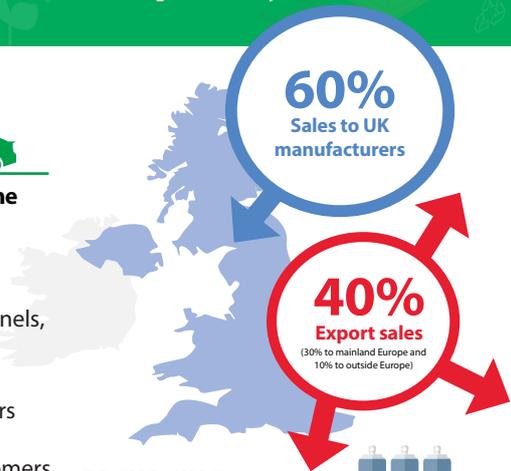
#### ENGINEERING



Tata Steel's UK business supplies over half a million tonnes to a range of large and small manufacturing companies that process steel into market segments that include: yellow goods (e.g. JCB, Caterpillar), radiator manufacturing, steel drum manufacture, white goods, office & medical equipment, agriculture & trailers, as well as the Royal Mint.

This sector is highly varied in its application and consists of many small and medium-sized businesses seeking to build globally competitive manufacturing operations.

**HELPING TO STRENGTHEN MANUFACTURERS AND INFRASTRUCTURE ACROSS BRITAIN**



# Key investments

**One of Port Talbot's two blast furnaces** was rebuilt in 2013 as part of **£250 million investment**, which included a £55 million energy-from-heat scheme.

**A £25 million blast furnace life extension** project was completed at Port Talbot in 2019

**A new £4 million high-tech robotic welding line** at Wednesfield's Automotive Service Centre optimises car panels for weight, cost efficiency and sustainability – all without compromising safety. In 2019 a multi-strand blanking line was installed to provide customers with a greater range of product options

**Installation of a new £25 million 'reversing rougher'** in 2014 – a major upgrade of the **Hot Strip Mill at Port Talbot** enabling it to further improve the quality of its steel products. In 2018 a multi-million pound project saw the installation of a transfer bar cooling system further improving quality

# Key customer stories

**Jaguar F-Pace:** Tata Steel recognised by Jaguar Land Rover for the quality of the products it supplies from both of its UK automotive focused sites



**The Shard, London:** As Western Europe's tallest building, The Shard has 87 floors with 1,000 tonnes of steel from Tata Steel's plant in Shotton, North Wales



**Wembley Stadium:** Tata Steel supplied 22,000 tonnes of steel for Wembley Stadium manufactured at a number of locations, including Corby and Hartlepool



**Dogger Bank Wind Farm:** Tata Steel is supplying steel to help create the world's biggest offshore wind farm being built in the North Sea.



**Domestic appliances:** Tata Steel's site in Shotton supplies the majority of steel used in domestic appliances produced by Indesit



**The Royal Mint:** Nearly all 1p, 2p, 5p and 10p UK coins in circulation originate from steel made in Port Talbot



# Key product launches

- ➔ **FULL FINISHED STEELS FOR CAR PANELS FOR CUSTOMERS INCLUDING JLR, BMW AND NISSAN**
- ➔ **ADVANCED COLORCOAT® PRE-FINISHED STEEL PRODUCTS FOR BUILDING APPLICATIONS.**
- ➔ **POLYMER-COATED PACKAGING STEELS, SUCH AS PROTACT®, WHICH CAN REDUCE TIN-CAN MAKERS' ENERGY AND CO<sub>2</sub> EMISSIONS**
- ➔ **OFF-SHORE PIPELINE LINES USED TO BRING OIL AND GAS ASHORE FROM DEEP WATER FIELDS**
- ➔ **COMFLOR® – SPECIALISED STEEL FLOORING FOR BUILDINGS PROVIDES SOUND-PROOFING**



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# TATA STEEL'S UK BUSINESS: OUR SITES

**SURAHAMMARS BRUK, SWEDEN**  
Electrical steels

**LISBURN**  
Processing

**SHAPFELL**  
Lime manufacturing

**SHOTTON**  
Galvanised and organic-coated steels; panel systems

**HARTLEPOOL**  
Pipes and tubes

**SWANSEA UNIVERSITY**  
Research and Development: Steel and Materials Institute

**SHEFFIELD**  
Sustainability and Environment

**TROSTRE**  
Packaging steels

**CORBY**  
Tubes

**PORT TALBOT**  
Integrated steelmaking, hot and cold rolling

**UNIVERSITY OF WARWICK**  
Research and Development

**LLANWERN**  
Cold rolled and galvanised steels

**ROUND OAK, DUDLEY**  
Distribution

**WEDNESFIELD**  
Processing and distribution

**CAERPHILLY**  
Steel for houses

Tata Steel's UK business also includes facilities in France, Germany and Norway, and sales offices across the world:

Europe	Spain, Italy, France & Romania
Americas	USA, Mexico & Brazil
Middle East	Turkey & United Arab Emirates
Asia	India & China