

## STRATEGIC PRIORITIES

# OUR ROADMAP FOR THE NEXT

We have made significant strides in the past year across our major strategic pillars, capitalising on existing and emerging opportunities within the industry. Our strategic priorities have allowed us to address stakeholder concerns and meet their expectations.

## S1

### Capacity expansion

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During the year, we have aggressively increased our capacity, living up to our commitment to 26 MTPA by FY 2025-26. This has involved several strategic initiatives, including the establishment of 4,000 TPD clinker unit in Shiva Cement, Odisha. Furthermore, we plan to add 4.0 MTPA grinding units each in Dolvi (Mumbai) and Vijayanagar (Karnataka) next year. We plan to set up a 3.0 MTPA clinker facility in Nagaur along with 2.5 MTPA grinding unit; Additionally, we plan for Vijayanagar expansion by another 4 MTPA grinding unit each in VJNR (6 MTPA to 10 MTPA) and Dolvi (4.5 MTPA to 8 MTPA). We plan to add another 2.5 MTPA grinding capacity in Punjab, 3 MTPA clinker capacity and 2.5 MTPA grinding capacity in Damoh and 2.5 MTPA grinding capacity in UP as part of our capacity expansion strategy. This ensures that we are well-diversified across different regions, where cement demand is increasing. Recent acquisitions such as 100% stake in Springway Mining from India Cements Limited, also gains us access to substantial limestone reserves. We intend to set up an integrated manufacturing facility adjacent to this mining reserve.

## S2

### Superior products

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Known for our innovative products and commitment to quality, we will continue to focus on these two deliverables. Our approach to product differentiation is closely tailored to the specific characteristics and thereby needs of each market:

- ▶ CHD/PCC pegged to A-Cat in South and West and PSC/PRO kept at A-15/20
- ▶ CHD pegged to A+ Cat in East & PSC/PCC at A-Cat
- ▶ Our product positioning for different products is clearly defined and communicated
- ▶ Taking into the demands of the market, we replaced PSC with Concreel HD in Kerala, Andhra Pradesh and Telangana and with PRO in Tamil Nadu
- ▶ We will continue to focus on revising packaging as per benchmarked brand for different markets

## S3

### Operational efficiency

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We are strategically positioning our plants to enhance efficiency and ensure a steady power supply. We are focusing on strategic backward integration by acquiring mines to improve our cost efficiency and streamline our value chain. At the same time, we are making investments in alternate fuels and waste-to-heat recovery systems to optimise production costs. Technological innovations are being utilised to optimise resource management. Our commitment to operational excellence extends to route-to-market optimisation. We are also focusing on the following:

- ▶ To streamline inbound logistics through investments in wagon tippers. In outbound logistics, we are implementing technology such as track and trace systems and control towers for end-to-end tracking and exception management
- ▶ To facilitate timely delivery of raw materials and finished goods, we have dedicated railway rakes. Our market focus is also shifting towards SP-P1 markets, and we are actively working on transitioning key markets to premium products



This year, we faced challenges in planning our branding activities, necessitating frequent revisions and adaptations. Despite these challenges, we took several initiatives:

- ▶ Successfully organised state-wise Local Annual Dealer Conferences, reaching over 2,000+ dealers and contributing significantly to our total trade sales
- ▶ Launched a new website - www.jswcement.in
- ▶ Conducted TV and radio campaigns during the Puri Rath Yatra
- ▶ During the IPL, we organised the successful Leader's Premier League, engaging our dealers, retailers, and influencers, with over 600 dealers winning and redeeming prizes

#### Demand generation through influencer management

We have introduced a unique Influencer Management Program aimed at masons, contractors, engineers, and architects. These value chain partners play a crucial role in the construction process, often influencing the choice of cement used. Our programme has successfully generated demand for JSW products and fostered a group of loyal brand ambassadors.

Some of the key sustainability initiatives:

- ▶ Committed to the GCCA 2050 Cement and Concrete Industry Roadmap for Net Zero Concrete
- ▶ Became the first company in the sector to have committed to all the three campaigns of RE100, EP100 and EV100 of The Climate Group, in one go
- ▶ Signed the CII's Climate Charter and became a member of CII Climate council, in 2022
- ▶ Committed to Science Based Targets initiative (SBTi) in July 2022
- ▶ We have also become a member of CII's India Business and Biodiversity Initiative (IBBI) and IUCN's Leader for Nature Programme. Both the above two engagements will help us enhance our awareness and efforts towards biodiversity conservation
- ▶ We are pursuing necessary levers for reducing CO<sub>2</sub> emissions
- ▶ Developed 'CO-CREATE', our ESG strategy for the first time, underpinned by seven strategic pillars

## S4

### Enhanced brand visibility

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## S5

### Environment protection

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