Marketing Research On Consumer Pull And Dealer Push Of Branded TMT Bars

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INTRODUCTION

STEEL AS A PRODUCT

Steel is widely used metal in the whole world. It is a versatile commodity which forms the core constituent of all major economies. Steel products fall into two main categories, namely **flat products and long products**. Flat products are derived from slabs and mainly comprise of rolled (RR) coils, plates and sheets. Long products derive their name from their shape and are made using billets and blooms, which include rods, bars, TMT bars, pipes, ropes and wires.

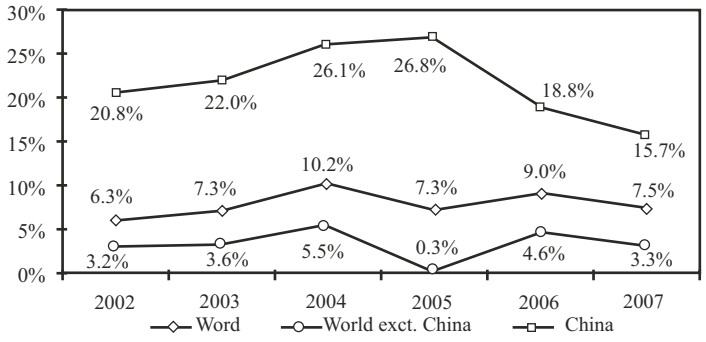
Steel is an alloy consisting mostly of iron with carbon content between .02% and 2.14% by weight depending on grade. Varying the amount of alloying and its distribution in steel controls qualities such as the hardness, elasticity, ductility and tensile strength of the resulting steel. Steel with higher carbon content is known as cast iron because of its lower melting point.

Though steel had been produced by various inefficient methods long before the renaissance, its use become more common after more efficient production methods were devised in the 17th century. Today, steel is one of the most common materials in the world and is a major component in buildings, tools, automobiles and appliances.

WORLD STEEL SCENARIO

The Global economy experienced robust growth in 2007, despite significant concerns about the impact of higher world oil prices. World GDP increased by 5.2% in 2007, led by China (11.4%), India (8.5%) and Russia (7.4%). The 14 other successor nations of the USSR and the other old Warsaw Pact nations again experienced widely divergent growth rates; the three Baltic nations continued as strong performers in the 8%-10% range of growth. World crude steel output reached 1,343.5 million metric tons (mmt) for the year 2007. This is an increase of 7.5% from 2006. The total represents the highest level of crude steel output in history and it is the fifth consecutive year that world crude steel production grew by more than 7%. However, the industry is still fragmented with the top ten steel producers controlling less than 30% of the world's steel output.

Figure 1: Crude steel production growth trend



Source: IISI 2007 report

China's steel production in 2007 reached 489 mmt, a 15.7% increase in 2006. China remains the driving force behind the still strong world production figures. Without China, world crude steel production would have only grown at 3.3%.

Other BRIC (Brazil, Russia, India and China) countries also maintained relatively high growth, with India and Brazil recording 7.3% and 9.3% increase respectively. The BRIC share of world production has been growing rapidly since 2000. It has grown from 31 % of the total in 2001 to 48.2% in 2007. In 2007, the top three steel producing countries remained China (489.0 mmt), Japan (120.2 mmt), and the US (97.2 mmt).

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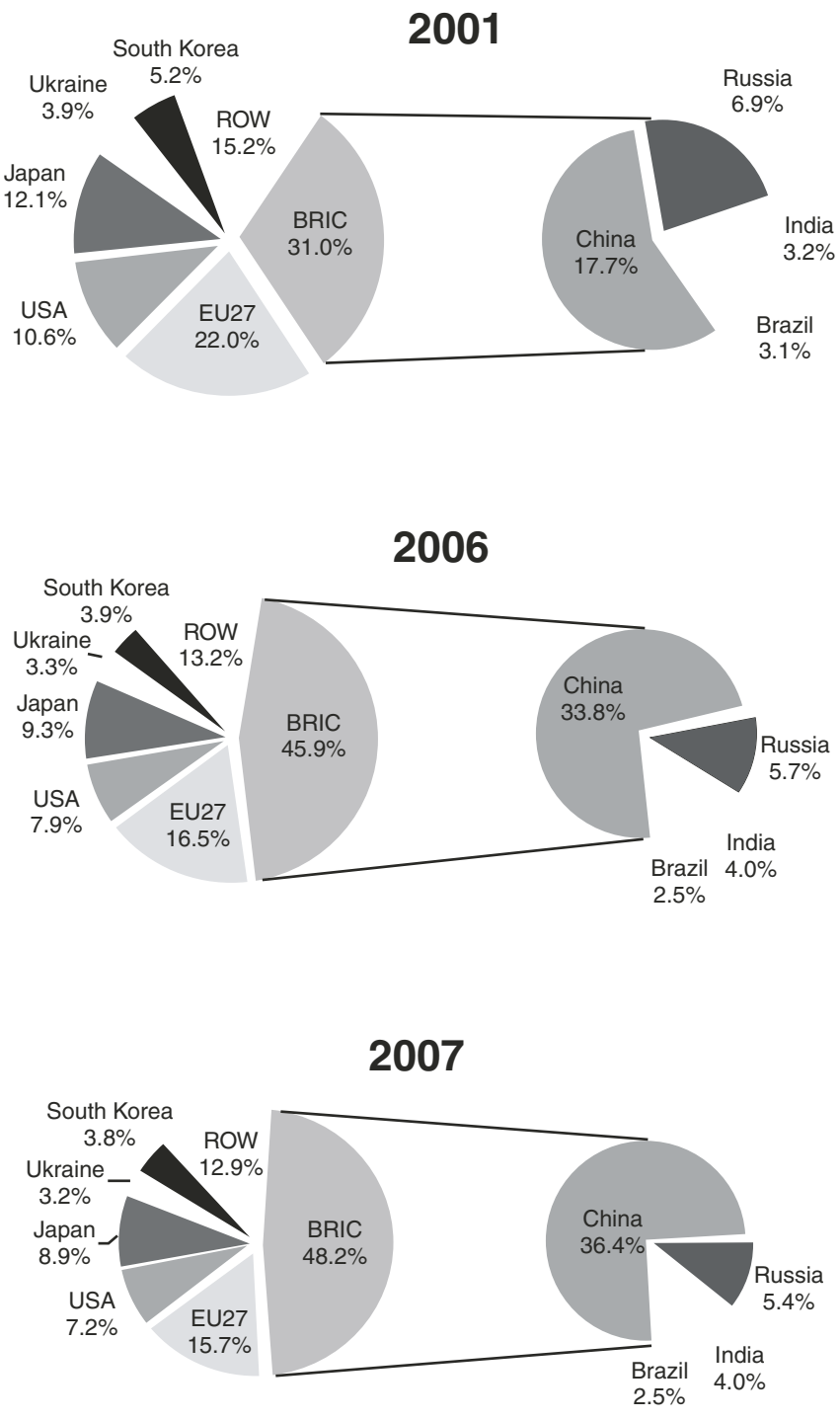
Share of world crude steel production for 2001, 2006 and 2007



Source: IISI 2007 report

The following Table shows the top 10 steel-producing countries in the world which clearly indicates China's lion share in crude steel production.

Top 10 steel producing countries

Country	Rank	2007	2006	% 07/06
China	1	489.0	422.7	15.7
Japan	2	120.2	116.2	3.4
United States	3	97.2	98.6	-1.4
Russia	4	72.2	70.8	2.0
India	5	53.1	49.5	7.3
South Korea	6	51.4	48.5	6.0
Germany	7	48.5	47.2	2.8
Ukraine	8	42.8	40.9	4.7
Brazil	9	33.8	30.9	9.3
Italy	10	32.0	31.6	1.2

Source: IISI 2007 report

Domestic Steel industry - An overview

Indian Steel journey: Modest beginning:

Prior to Independence (1907-1947)

The Indian iron and steel Industry is now almost a century old. At the time of Independence in 1947, India already had a small but viable iron and steel capacity of around one million tonne per annum, thanks mainly to the patriotic zeal of a few entrepreneurs of outstanding stature such as Sir Jamshedji Tata, Dr. Visvesvaraya and Dr. R.N Mukerjee. The entire capacity of the nascent iron and steel industry was in the private sector.

CHRONOLOGY OF THE EARLY STEEL PLANTS IN THE PRIVATE SECTOR

Tata Iron and Steel Company-1907

Mysore Iron and Steel Company. (later renamed Vivesvaraya Iron & Steel Ltd)-1923.

Steel Corporation of Bengal (later renamed Martin Bum Ltd and Indian Iron & Steel Ltd)-1923.

Steel Corporation of Bengal (later renamed Martin Bum Ltd and Indian Iron and steel Co)-1939

TOWARDS PLANNED GROWTH-(1956-1968)

The first push to this industry came during the first three five year plans (1952-1970). Massive injections of investment in public sector coupled with a protected market environment laid the foundations of a viable and competitive indigenous iron and steel industry.

THE JOURNEY THEREAFTER

The growth of the steel industry went on. Production had increased from 17 MT in 1990 to 53 MT in 2007 and 70 MT is targeted for 2011. Steel is yet to touch the lives of millions of people in India and has to go a long way to reach consumption levels of around 400 kg in developed countries like USA and world average of 160 kg.

IISI, Brussels in his study report (2007) has made the following projection for steel demand in India by 2020.

LIKELY STEEL DEMAND IN INDIA BY 2020

Scenario	Likely steel demand (MT)
Pessimistic	120
Most likely	150
Optimistic	180

Source: Study report of Brussels. IISI 2007

SOME OF THE MAJOR PLAYERS IN THE INDIAN STEEL INDUSTRY ARE

Steel Authority of India Ltd, Tata Iron and Steel Company (TISCO), Essar steel, JSW Steel Ltd, Ispat Industries Ltd, Rashtriya Ispat Nigam Ltd, Jindal Strips Ltd, Lloyds steel Industries Ltd, Electro Steel Castings Ltd, Saw Pipes, Uttam Steels Ltd, Mukand Ltd, Usha Ispat Ltd, Kalyani Steel Ltd, Sesa Goa Ltd.

The following table shows the extract of the report of working group of XI plan for steel regarding the steel predictions by 2011-12.

Year wise break up of most likely steel capacity during XI plan (MT)

Investors	2007-08	2008-09	2009-10	2010-11	2011-12
SAIL	12.84	12.84	12.84	24.84	24.84
RINL	2.91	2.91	6.30	6.80	6.80
TATA	5.00	6.80	9.80	9.80	13.00
ESSAR	4.60	6.80	7.65	11.50	14.50
JSW+SISCOL	4.10	8.00	8.00	8.00	11.00
SPL	2.45	3.00	5.45	8.45	10.45
SPAT	3.60	3.60	3.60	3.60	5.00

BHUSHAN	0.50	1.50	2.50	3.00	6.00
MONNET	1.50	1.50	2.50	2.50	2.50
NINL	-	0.50	1.10	1.10	1.10
OTHER+SECONDARY	20.40	20.43	20.88	22.70	23.87
TOTAL	59.70	70.68	83.42	106.08	124.06

Source: Report of working group of XI plan for steel

OBJECTIVES OF THE STUDY

The present study is principally aimed at analyzing consumer pull and dealer push with regard to TMT bars. More specifically, the study is intended:

- To find the impact of advertisement activities on awareness of customers.
- To find the impact of promotional activities on dealers.
- To find out which mode of advertising media TMT bars customers are interested in, so that would help the company in selecting the best advertising tool.
- To examine the brand awareness of TMT bars among the respondents.
- To offer suggestions for improving the levels of consumers as well as dealers' satisfaction with regard to TMT bars in the light of findings of the study.

SCOPE AND SIGNIFICANCE

"**Customer Pull**" and "**Dealer Push**" are marketing jargons used to indicate the consumer demand for a particular brand and the dealer to see a particular brand perceptively. This reference reflects their attitudes and perception towards the brand.

THEORETICAL ASPECTS

There are three types of sales promotion strategies: Push, Pull or a combination of the two. **A push strategy** involves convincing trade intermediary channel members to push the product through the distribution channels to the ultimate consumer via promotions and personal selling efforts. Typical tactics employed in push strategy are allowances, buy-back guarantees, free trials, contests, specialty advertising items, discounts, displays and premiums.

A pull strategy attempts to get consumers to "**pull**" the product from the manufacturer through the marketing channel. This strategy is often employed if distributors are reluctant to carry a product because it gets as many consumers as possible to go to retail outlets and request the product thus pulling it through the channel. Typical tactics employed in pull strategy are: samples, coupons, cash refunds and rebates, premiums, advertising specialties, loyalty programs/patronage rewards, contests. sweepstakes, games and point-of-purchase (POP) displays.

TMT BARS AS A PRODUCT

Thermo Mechanically Treated Steel known as TMT steel can be described as new-generation-high-strength steel having superior properties such as weldability strength, ductility and bendability meeting highest quality standards at the international level. Under thermo mechanical treatment of bars, the steel bars are made to pass through a specially designed water cooling system where these are kept for such a period that outer surface of bars becomes colder while the core remains hot. This creates a temperature radiant in the bars. When the bars are taken out of the cooling system, the heat flows from the core to the outer surface causing further tempering of steel bars thereby helping them in attaining higher yield strength. Thermo Mechanically Treated bars (TMT bars) have several advantages over the other types of steel. To mention a few are bendability, weldability, rust and corrosion resistance, fire resistance, cost saving and wide application.

ROLLED-PRODUCTS TMT BARS

The process involves converting the shape stock viz., ingots, billets to the desired finished section in the hot condition by way of passing the material between a pair of grooved rolls and providing suitable drafts at various stages. The whole operation is conducted at a particular temperature range and within a limited time span. The stages of rolling operation are comprised of heating of feed stock to rollable temperature, rolling the feeding stock in different mill stands, cropping the hot bar during the process of rolling between mill stands as applicable and subsequently finishing in form of hot rolled reformed bar in straight length. The hot bar coming out of the last pass is then conveyed through TMT line and collected in a cool bed after shearing. The bars at almost ambient temperature are sheared to commercial length, stored and kept ready for dispatch.

CHEMICAL COMPOSITION OF TMT BARS

Constituents	Ranges
Fe	99.0-99.2%
C	0.18 - 0.2%,
Mn	0.56- 0.91%
S	0.035-0.045%
P	0.08 - 0.033%

GROWTH OF TMT BARS IN INDIA

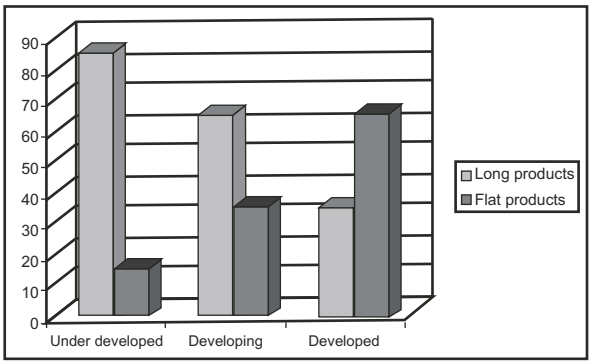
Besides steel consumption, the other main change will be regarding the type of steel reinforcement bars (rebars) used in the country. The pattern for over three decades has been total reliance on cold twisted deformed (CTD) rebars - even though most developed countries in the world had stopped its usage within a few years of its production and patent. CTD rebars are now in the last stages in the country and it is on1y a matter of time before India too starts to go the global way. TMT bars overtook the CTD bars market due to enhanced knowledge of the consumer and civil engineer.

Although public sector steel manufacturer, SAIL introduced TMT bars in India in the 1990s, the category really took off only after the launch of Tata Steel's branded rebar Tata-Tiscon in 2001. Several secondary steel makers entered to TMT bars industry in 1995 and now the number has gone up to more than 2200. Today, major steel producers of TMT bars market share only 28% while rest 72% market share has been captured by secondary steel producers.

GROWTH PROSPECTS OF TMT BARS INDUSTRY

In early stages of development, the bulk of steel requirement was for long products for infrastructure and basic industries. Demand for flat products increased as the country developed and the need for white goods and consumer products rose. These are shown in charts below.

Long and Flat product usage and development



It is generally accepted that 80% to 85% long products are needed in under developed countries and about 60% to 65% in developing countries and 30% to 35% in developed countries. Per capita steel consumption is generally 5 to 50 kg in under developed countries. 50 - 250 kg in developing and over 250 kg in developed nations. The world average is around 145 kg. The current per capita steel consumption in India, at a dismal 38 kg is only at the level of an under-developed country. The current proportion of flat to long product consumption in India at about 55%-45% (ideally the reverse is desired today) is alarmingly tilted towards the flat products for the present level of development and is a consumption pattern found in near developed countries. These two facts are significant and indicate that India has very small pockets of high development alongside major areas in the country in a state of neglect. Large amount of work remains to be done for development of the country as a whole.

SWOT ANALYSIS OF THE INDUSTRY

The strengths, weaknesses, opportunities and threats for the Indian steel industry have been tabulated below.

Strengths • Availability of iron ore and coal • Low labour wage rates • Abundance of quality man power • Mature production base	**Weaknesses** • Unscientific mining • Low productivity • Coking coal import dependence • Low R&D investments • High cost of debts • Inadequate infrastructure
Opportunities • Unexplored rural market • Growing domestic demand • Exports Consolidation	**Threats** • China becoming net exporter • Protectionism in the west • Dumping by competitors • Cartel by iron ore miners

MAJOR CHARACTERISTIC DIFFERENCES OF TMT BRANDS

There are several TMT brands available in the market namely SAIL-TMT, Tata-Tiscon, Vizag-TMT, Rathi-TMT, Kamadhenu-TMT, Metro-TMT, AISCO-TMT, SRMB-TMT, Kalpataru-TMT, Rana Saria, Bamala TMT, Bhatahma Gold, Prime Gold, Shyam-TMT, Bajaj-TMT etc.

TMT bars are classified according to grade size and length. According to application, the different grade of TMT bars will be produced like ones used in seismic zone area where high strength is required, fire prone area where toughness is required. They will be produced based on the application chemical composition of TMT bars.

Although public sector steel manufacturer, SAIL introduced TMT bars in India in 1990s the, category really took off only after the launch of Tata Steels branded rebar Tata Tiscon in 2001 and its mass media promotion.

Several secondary producers come up with new arrangements to widen the base in the market. Secondary steel producers like Kamadhenu and Rathi have come up with new arrangements like franchisees.

Rathi Steel have 800 dealers network to reach the market as well as the company sells its products in its own retail houses and sales executives cater directly to the needs of corporate and Government clients. Companies also endorsed celebrities to woo the customers.

Ramsarup-TMT has different strategy of retaining the customers, more focussed on repeat purchase and also has the model delivery to the doorstep of customized product for distribution tied up with a courier giant for speedy delivery.

TMT bars industry sells 78% of its product from dealers network so dealers' satisfaction its utmost important for all the manufacturers. Push strategy is adopted by secondary steel makers. However, major players adopt both pull and push strategy to widen market base.

METHODOLOGY

DATA SOURCES

Primary Data Sources: Collected through personal interviews and field work.

MEASUREMENT TECHNIQUES

Questionnaire for customer and dealers.

Secondary Data Sources: Newspapers, Business Magazines, Websites are some important sources of information which are used in this work.

SAMPLING PROCESS:

Sampling area: Shimoga City

Sampling Unit: Professionals, business people and employees.

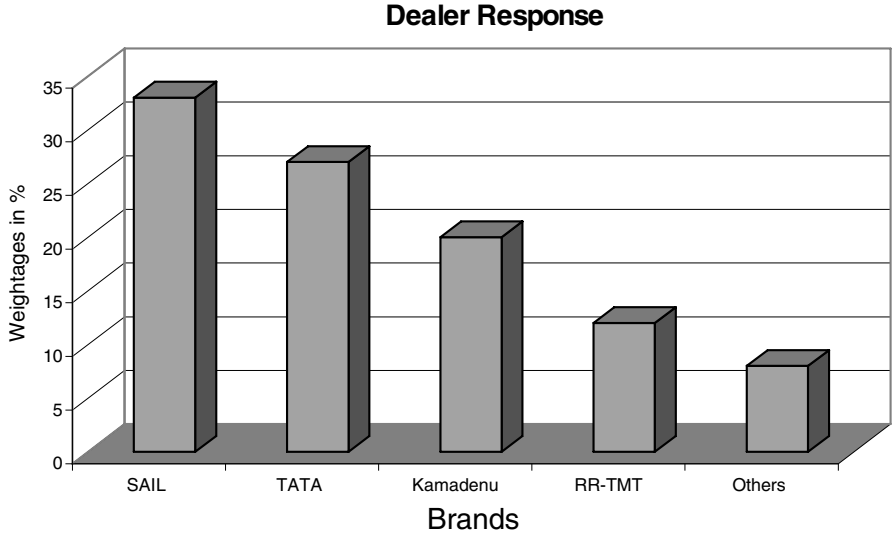
Sampling Method: Stratified Random Sampling.

Sampling Size: 70 respondents of customers and 35 respondents of dealers.

Sampling Plan: 16 respondents of North, East and Western parts of Shimoga and 22 respondents from southern part of Shimoga were contacted and interviewed.

Period of study: The responses were collected during the period of January - May 2008.

DEALER RESPONSE ANALYSIS



The Dealers survey regarding the fastest moving brands of TMT bars in their counters has been presented in the diagram.

Brands	**Percentage**
SAIL	33
TATA	27
Kamadhenu	20
RR-TMT	12
Others	08
Total	100

Source: Dealer survey

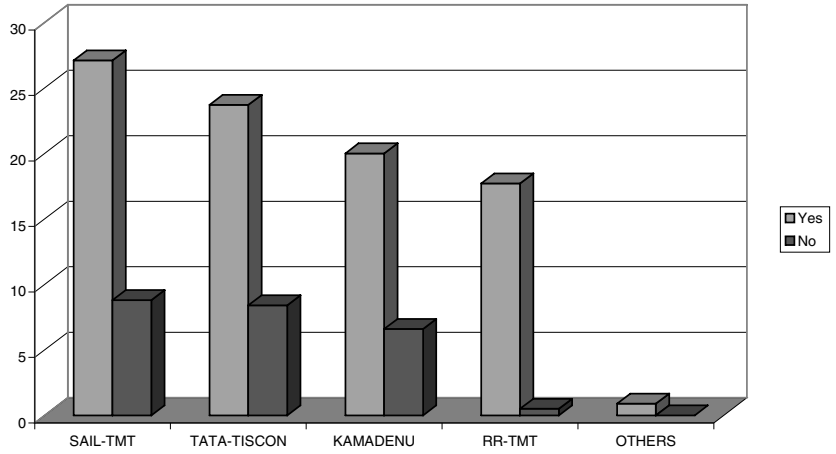
There is a clear indication of SAIL-TMT as the fastest moving brand followed by TATA-Tiscon brand. The factors that influenced the dealer to take the dealership of particular TMT brand in order of their preference / priority are; profit margin, credit/discount/policy, promotional incentives and brand image.

DEALER'S ADVICE TO CUSTOMERS FOR BUYING THE TMT BARS

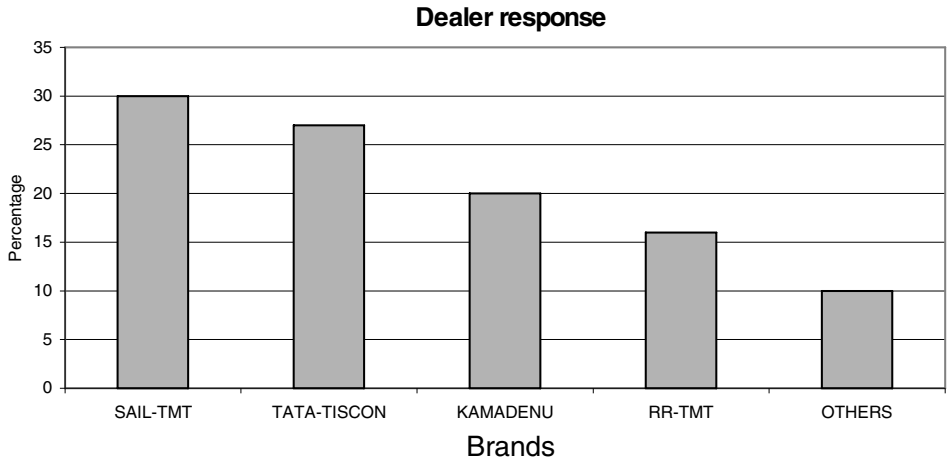
Relationship between fast movements of brands of cements with advice given by dealers is recorded in the following diagram

Brands	Yes	No
SAIL-TMT	27.09	8.8
TATA-TISCON	23.7	8.4
KAMADENU	20.00	6.6
RR-TMT	17.7	0.5
OTHERS	0.9	0.0

Source: Dealer survey



The chart reveals that there is a fast movement of branded TMT bars where the dealers have given their suggestions and also reveals that SAIL-TMT is the fastest moving brand of TMT bars with regard to dealer



Brands	Percentage
SAIL-TMT	30
TATA-TISCON	27
KAMADENU	20
RR-TMT	16
OTHERS	10
TOTAL	100

Source: Dealer survey

suggestion.

RANKING OF BRANDS ACCORDING TO DEALERS OF SHIMOGA CITY

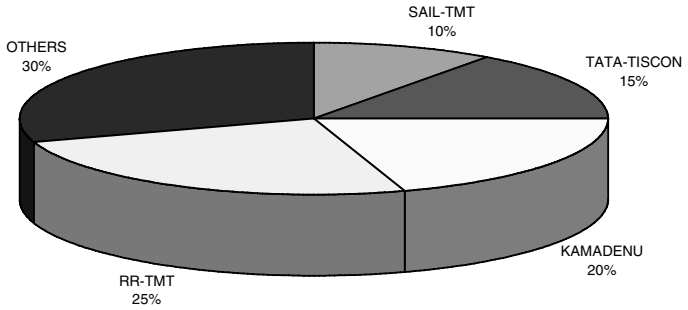
The above bar chart shows that majority of the dealers have given opinions according to their preference where SAIL-TMT is the first preference for majority of dealers followed by TATA-Tison, Kamadhenu, RR-TMT and others respectively.

COMPLAINTS RECEIVED BY DEALERS FROM THE TMT BARS CUSTOMERS

The response regarding the rate of filed complaints received by the dealers from TMT bars customers has been collected and presented in the form of a chart below:

Brands	Percentage
SAIL-TMT	10
TATA-TISCON	15
KAMADENU	20
RR-TMT	25
OTHERS	30
TOTAL	100

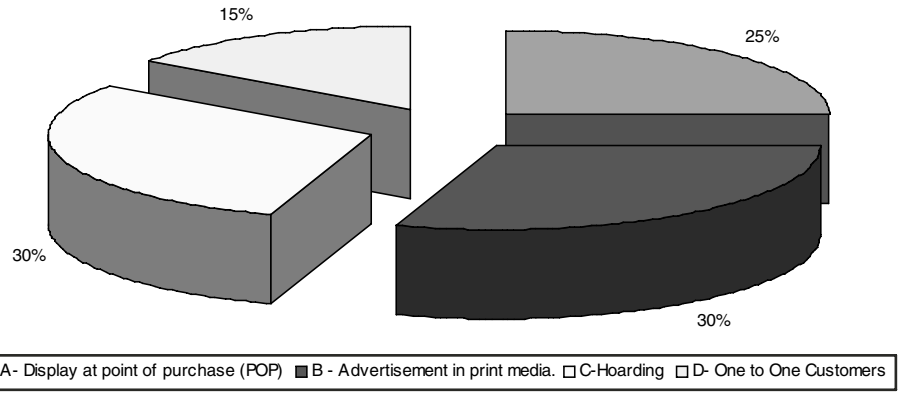
Source: Dealer survey



The table clearly indicates that SAIL is with the least filed complaints followed by TATA-Tiscon

Promotional Method	Percentage
A- Display at point of purchase (POP)	25
B - Advertisement in print media.	30
C-Hoarding	30
D- One to One Customers	15
Total	100

Source: Dealer Survey



MOST EFFECTIVE PROMOTIONAL METHOD

The above chart reveals that the branded TMT bars should give more stress on advertisement in print media and display at POP.

ATTRIBUTE ANALYSIS

PRICE

The survey reveals that SAIL- TMT has been ranked as 5th (in the scale or 1 to 5) in TMT bars industry where 31 % and 36% respondents have ranked it as second best priced.

PROFITABILITY MARGIN

The response received reveals that TATA- Tiscon has been ranked as 5th by majority of the respondents

AVAILABILITY

For Tata-Tiscon, 46% of the respondents have ranked it as 5th and SAIL- TMT and Kamadhenu has been ranked next by 50% of the respondents, 12.5% of them have ranked for other brands.

SPEEDY SETTLEMENT OF CREDIT RATES

Majority of the dealers have ranked Tata-Tiscon as the best in settlement of credit rates and SAIL-TMT' has been ranked next. Most of the Kamadhenu dealers have ranked it the least in speedy settlement of credit rates.

FLEXIBLE DEALER FRIENDLY DISCOUNT / CREDIT POLICY

40% of the respondents have ranked Tata-Tiscon as the best in their flexible dealer friendly discount / credit policy. Majority of the respondents i.e. 57% have opined that SAIL-TMT as second best in their credit policy. Kamadhenu ranked the last. Even other dealers have ranked it the last.

SPEEDY SETTLEMENT OF WARRANTY COMPLAINTS

The survey reveals that majority of them i.e. 42% of the respondents have ranked Tata-Tiscon as the best in their speedy settlement of warranty complaints followed by SAIL-TMT, Kamadhenu, RR-TMT and other brands is in the last.

SALES PROMOTION

64% of the respondents have ranked SAIL-TMT Super as the best. 55% of the respondents have ranked TATA-Tiscon as the second best. Majority dealers of Kamadhenu have ranked it as third.

CUSTOMER PULL

The response received reveals that Tata-Tiscon has strong customer pull followed by SAIL-TMT, Kamadhenu and other brands.

CUSTOMER RESPONSE ANALYSIS

An attempt was made to get the customer preference for different branded TMT bars and the same has been presented in the following table.

Customer Preference for Different Brands

Brand	Rank					Total
	1	2	3	4	5	
SAIL-TMT	14	8	4	10	34	70
	20%	11.4%	5.8%	14.3%	48.6%	100%
TATA-Tiscon	14	24	24	2	6	70
	20%	34.3%	34.3%	2.9%	8.6%	100%
Kamadhenu	18	10	10	16	16	70
	25.7%	14.3%	14.3%	22.9%	22.9%	100%
RR-TMT	18	16	16	12	8	70
	25.7%	22.9%	22.9%	17.1%	11.4%	100%

Source: Customer Survey

The table reveals that 48% of total respondents is prefer SAIL-TMT as first preferred brand, 34% of them have ranked TATA-Tiscon as their second preferred brand. 25% of them have ranked as their last preference.

PROMOTIONAL FACTOR INFLUENCE ON CUSTOMERS

An attempt was made to know the influence level of promotional factors for different branded TMT bars and the

(Promotional Factor Influence on customers)

Promotional Factor	Frequency		Total
	Yes	No	
Advertisement in TV	40 (57.1%)	30 (42.9%)	70 (100%)
Advertisement in Print	4 (5.7%)	66 (94.3%)	70 (100%)
Word of mouth	36 (51.4%)	34 (48.6%)	70 (100%)

Event sponsoring	12 (17.1%)	58 (82.9%)	70 (100%)
Bill board	-	75 (100%)	70 (100%)
Point of Purchase	16 (22.9%)	54 (77.1%)	70 (100%)

Source: Customer Survey

same has been presented in the following table.

From the table it is revealed that majority of customers are influenced by advertisement in television followed by the word of mouth advertisement and point of purchase also plays a significant role in influencing the customer to purchase particular brands of TMT bars.

MOST ESSENTIAL FACTORS THAT CUSTOMERS CONSIDER IN THEIR PURCHASE DECISION

An attempt was made to study the most essential factors that customers consider at the time of making purchase decision for different branded TMT bars and the same has beeen presented in the following table.

Most Essential Factors that Customers Consider in their Purchase Decision

Factors	Less Important	Important	More important	Total
Brand Image	10	38	22	70
	14.3 %	54.3 %	31.4 %	100 %
Durability	-	6	64	70
	-	8.6 %	91.4 %	100 %
Price	8	42	20	70
	11.4 %	60 %	28.6 %	100 %
Quality	-	12	58	70
	-	17.1 %	82.9 %	100 %
After services	24	24	22	70
	34.3 %	34.3 %	31.4 %	100 %
Advertisement	34	28	8	70
	48.6 %	40 %	11.4 %	100 %

Source: Customer Survey

The table reveals that majority the of customers consider durability, the structure and consistency in quality as most important factors followed by brand image, price as important factors. On the whole, quality and durability are the two most important factors which play a decisive role in their purchase decision.

SUGGESTIONS AND RECOMMENDATIONS

❖ More number of customers are aware about the brands of SAIL and TATA steel, Kamadhenu and Vizag steel have to take some serious steps in increasing the awareness of TMT brand in Shimoga city. The awareness activities for this brand may include bill-boards, TV ads, hoardings and newspaper.

❖ As many respondents expressed that the customer's meetings are not actually done, so the company has to take some measures to improve the coverage of the customer meets.

❖ The company has to make sure that the gifts are reaching the customers without any obstacle.

❖ It is proved that most of the end users have been influenced by the influencers like channel partners and contractors, engineers and masons. So the company can improvise the promotional activities directed at them so as to enhance sales.

❖ Most of the people are not aware about Value Added Services (VAS) provided by the companies. So the companies have to take some steps to enhance awareness about the VAS in Shimoga city.

CONCLUSION

The study reveals that majority of the dealers have more than 8 to 15 years of experience in trade. They deal with many brands. TATA-Tiscon is one such major brand. In the counters of dealers, SAIL-TMT is the fastest moving brand. Next is TATA-Tiscon and Kamadhenu occupies the third place. According to the dealers, the performance of Tata-Tiscon is good. This study also reveals that suggestions given by dealers' expectation attributes- like incentives, favorable profit margin and schemes like cash discount and quantity discount. So it can be concluded that manufacturers can motivate and promote the dealers in selling their TMT brands through such schemes and attributes which are more interesting to dealers.

The study shows the brand awareness of customer of SAIL-TMT, TATA- Tiscon and Kamadhenu is good as compared to RR-TMT, SAIL-TMT (the market leader in TMT bars Industry) and next brand leader is TATA-Tiscon TMT bars in Shimoga city.

The study also reveals that the types of field complaints received are bendability, foughness and application of TMT bars.

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