

Investor Presentation Q3FY24

09 February 2024



“Leave this world
better than you found it”

Shri. Bhavarlal H. Jain (1937-2016)

Founder

ABOUT COMPANY

Jain Irrigation Systems Ltd, with its Corporate Mission "Leave this world better than you found it" is a diversified entity with turnover of close to one billion US dollars. We have a global presence with 19 manufacturing bases spread over four continents. Our products are supplied to 126+ countries with able assistance from 4,000+ dealers and distributors worldwide. We have reached to over 10 million farmers. Jain Irrigation is a worlds largest tissue culture company in Banana plantations more than 150 million plants annually.

₹61.7Bn

Consolidated Revenues^
31st December, 2023

₹8.4Bn

Consolidated EBITDA^
31st December, 2023

^ For trailing four quarters

9,000+

Associates Globally



Jain Irrigation Systems Ltd.

Small Ideas. Big Revolutions.®

TOUCHING LIVES IN MORE THAN ONE WAY



**DRIP
IRRIGATION**



**SPRINKLER
IRRIGATION**



**PRECISION
FARMING**



**TISSUE
CULTURE**



**RESOURCE
TO ROOT**



**PVC PIPES &
FITTINGS**



**PE PIPE &
FITTINGS**



**PLUMBING
SYSTEMS**



**DRINKING
WATER SOLUTION**



**PLASTIC
SHEETS**



**FRUIT
PROCESSING**



**SPICES
PROCESSING**



**DEHYDRATED
PRODUCTS**



**IQF
PRODUCTS**



**RENEWABLE
ENERGY**

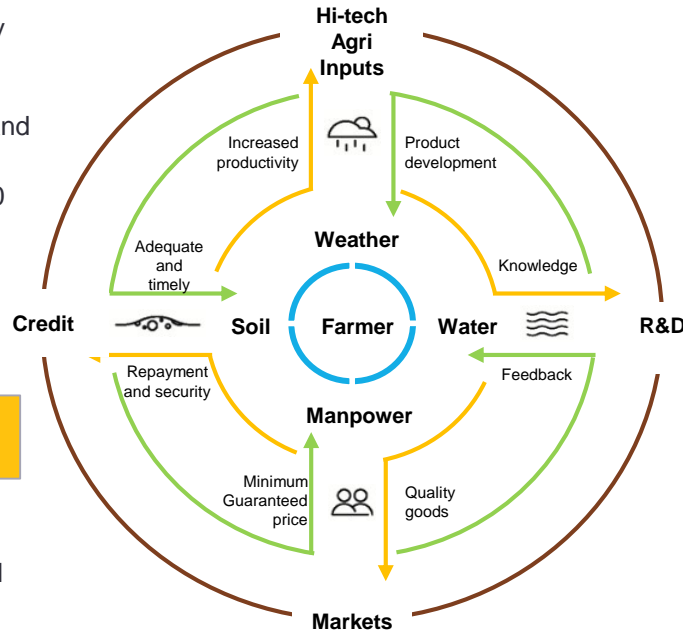
UNIQUE, WELL DIVERSIFIED, FULLY INTEGRATED AGRI VALUE CHAIN BUSINESS

Hi-Tech Agri

- ▶ Drip & Sprinkler Systems, Precision Farming Advisory including green & poly houses
- ▶ Large Tissue Culture plant capacity for Banana, Pomegranate, Sweet Orange and others
- ▶ Wide distribution presence – over 4,000 dealers / distributors
- ▶ World class manufacturing facilities
- ▶ Solution based approach
- ▶ Strong in-house R&D base

Agro Processing

- ▶ Fruit pulps, concentrates, vegetable dehydrations, spice processing, etc.
- ▶ Global leaders in Mango processing and Onion dehydration
- ▶ Catering to top global food companies
- ▶ Manufacturing in India, UK, USA and Turkey



Plastic

- ▶ PVC Pipes, fittings, Polyethylene Pipes Turnkey Projects, PVC Sheets
- ▶ Catering to Agricultural, Industrial & Infrastructural customer base
- ▶ Manufacturing primarily in India
- ▶ Forayed into urban markets by introducing plumbing systems
- ▶ Plastic Sheet manufacturing business in USA & UK to serve local customers

Others

- ▶ Solar Thermal Products, Solar Photovoltaic Grid & Off-Grid Products
- ▶ Solar Power generation investments to reduce cost of power
- ▶ Agri R&D activities

PRODUCTION FACILITIES : INDIA



Jain Plastic Park
Jalgaon (Maharashtra)
Micro Irrigation, Plastic
division



Jain Plastic Park
Hyderabad (Telangana)
Plastic Piping



Jain Plastic Park
Alwar (Rajasthan)
Plastic Piping



Jain Agri Park
Jalgaon
(Maharashtra)
Agri R&D - Tissue
Culture Lab



Jain Agri Park
Kurnool, AP
Planting Material



Jain Agri Park
Coimbatore (TN)
R&D Farm /
Planting Material



Jain Energy Park
Jalgaon
(Maharashtra)
Solar & BioGas



Jain Food Park
Jalgaon
(Maharashtra)
Fruit Processing



Jain Food Park-I
Chittoor (AP)
Fruit Processing



Jain Food Park-II
Chittoor (AP)
Fruit Processing



Jain Food Park
Jalgaon (Maharashtra)
Onion & Vegetable
Dehydration



Jain Food Park
Vadodara (Gujarat)
Onion &
Vegetable
Dehydration

PRODUCTION FACILITIES : OVERSEAS



Jain Farm Fresh,
Turkey
Food Processing



SQF Ltd. UK
Food Processing



Jain Farm Fresh Food Inc. USA
Food Processing



Innovafood N.V. Belgium
Food Processing



Ex-Cel Plastics Ltd. Ireland
Plastic Sheet



NIP UK
Plastic Sheet



Boomer Industries Ltd., UK
Plastic Sheet



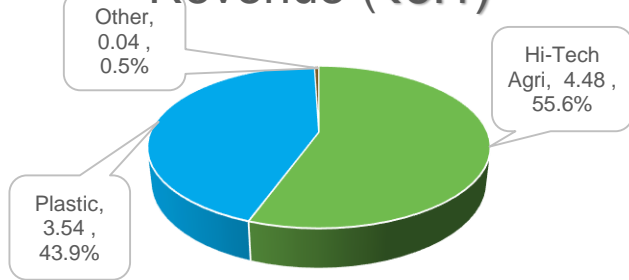
Nucedar Mills, USA
Plastic Sheet

BUSINESS OVERVIEW AND PRODUCT PORTFOLIO (3QFY24)

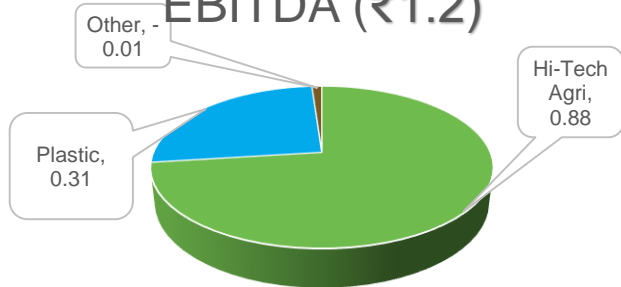
All fig. in ₹ bn

Standalone

Revenue (₹8.1)



EBITDA (₹1.2)



JISL-India Standalone

Hi-tech Agri Input Products : *Micro Irrigation Systems, Tissue Culture Plants, Solar Agri Pump & Integrated Irrigation Projects.*

Plastic Products: *PVC Piping Products, PE Piping Products, Piping Projects, Plastic Sheets*

Others: *Solar Thermal Products, Solar Photovoltaic System, Solar Power Pack, Agri R&D Activities*

JFFFL-India Standalone

Fruits Processing
Onion and Vegetables dehydration Products
Spices Processing
Bio Gas

Food - Overseas

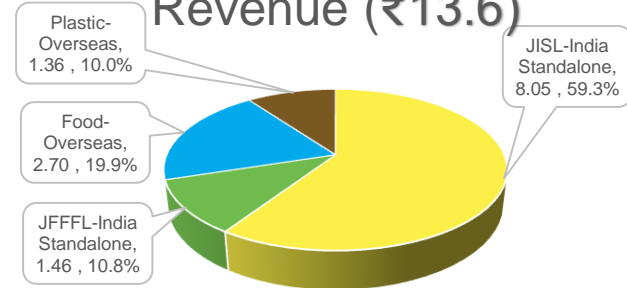
Fruits Processing
Spices Processing

Plastic - Overseas

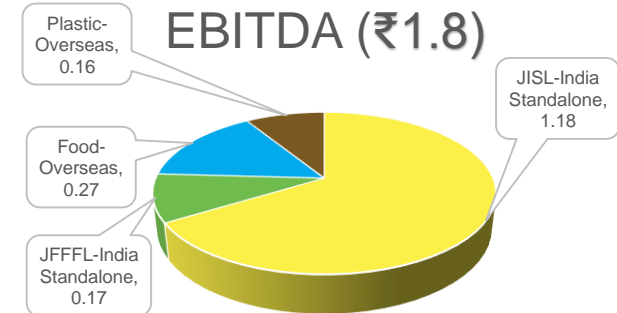
Plastic Sheets

Consolidated

Revenue (₹13.6)



EBITDA (₹1.8)

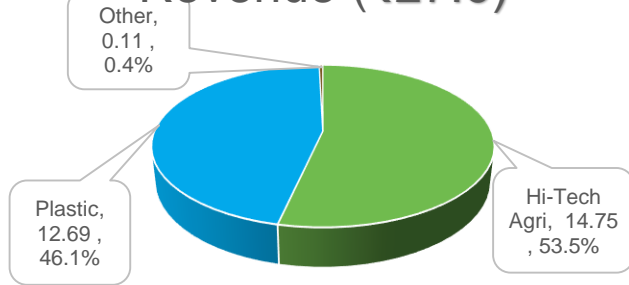


BUSINESS OVERVIEW AND PRODUCT PORTFOLIO (9MFY24)

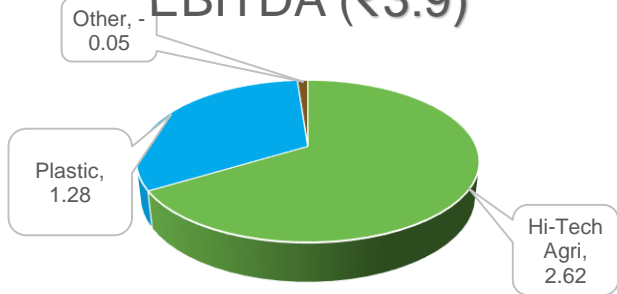
All fig. in ₹ bn

Standalone

Revenue (₹27.6)



EBITDA (₹3.9)



JISL-India Standalone

Hi-tech Agri Input Products : *Micro Irrigation Systems, Tissue Culture Plants, Solar Agri Pump & Integrated Irrigation Projects.*

Plastic Products: *PVC Piping Products, PE Piping Products, Piping Projects, Plastic Sheets*

Others: *Solar Thermal Products, Solar Photovoltaic System, Solar Power Pack, Agri R&D Activities*

JFFFL-India Standalone

Fruits Processing
Onion and Vegetables dehydration Products
Spices Processing
Bio Gas

Food - Overseas

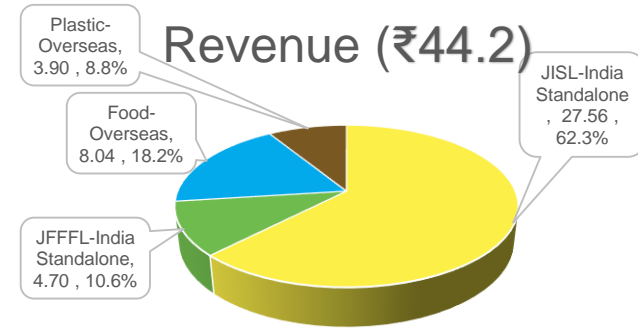
Fruits Processing
Spices Processing

Plastic - Overseas

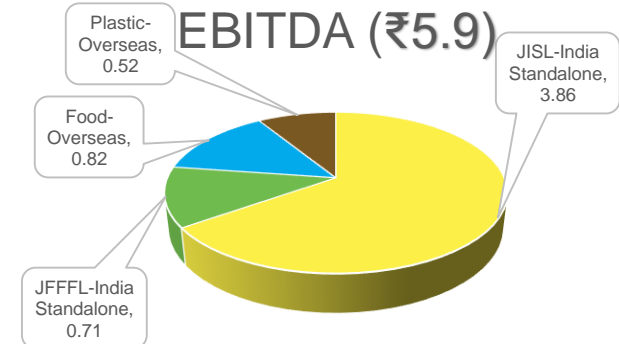
Plastic Sheets

Consolidated

Revenue (₹44.2)



EBITDA (₹5.9)



FINANCIAL PERFORMANCE : STANDALONE

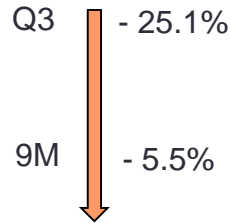
All figures in ₹ Million

Particulars	3QFY24	3QFY23	YoY change	9M FY24	9M FY23	YoY change
Revenue	8,053	9,829	-18.1%	27,559	24,475	12.6%
<i>Hi-Tech</i>	4,477	5,974	-25.1%	14,751	15,609	-5.5%
<i>Plastic</i>	3,536	3,812	-7.3%	12,693	8,649	46.8%
<i>Other</i>	40	43	-6.9%	114	217	-47.4%
EBITDA	1,177	1,435	-18.1%	3,859	3,298	17.0%
<i>Hi-Tech</i>	879	971	-9.6%	2,624	2,629	-0.2%
<i>Plastic</i>	311	500	-37.9%	1,282	616	108.3%
<i>Other</i>	-13	-36		-47	53	
Margin	14.6%	14.6%		14.0%	13.5%	
<i>Hi-Tech</i>	19.6%	16.3%		17.8%	16.8%	
<i>Plastic</i>	8.8%	13.1%		10.1%	7.1%	
PAT	18	225		304	47	
Cash PAT	387	600		1,421	1,170	

SEGMENT REPORTING : STANDALONE

All figures in ₹ Million

YoY
Revenue

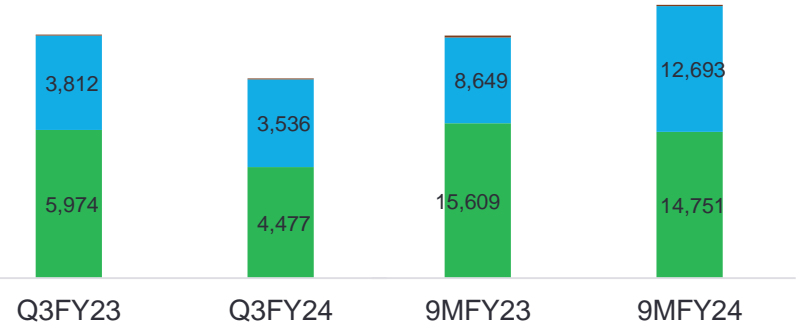


Hi-Tech Agri

During Q3FY24, Hi-Tech segment experienced 25.1% contraction, due to strategic reduction in the project business (-87%). Untimely rains in MH & KN impacted Retail business registering de-growth by 4%. However, TC business witnessed a healthy growth of 19%.

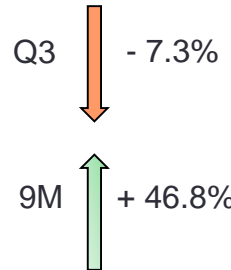
During 9MFY24, Hi-Tech segment experienced 5.5% contraction, due to strategic reduction in the project business (-59%). Retail business continued to do well and grown by 17% and TC business witnessed a strong growth by 42%.

Revenue



■ Hi-Tech Agri ■ Plastic ■ Others

YoY
Revenue

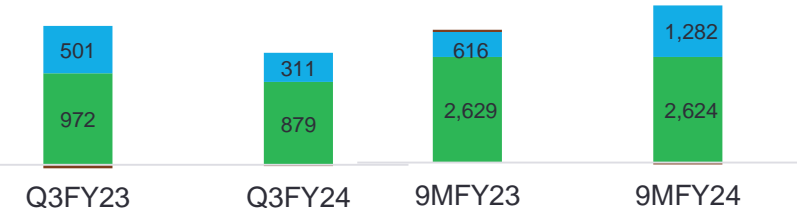


Plastic

During Q3FY24, Plastic segment experienced 7.3% reduction, due to strategic reduction in the project business (-46%). Retail business registered de-growth of 6%.

During 9MFY24, Plastic segment demonstrated strong growth of 46.8%, despite of strategic reduction in the project business (-36%). However, Retail business has significantly grown by 66%.

EBITDA



■ Hi-Tech Agri ■ Plastic ■ Others

FINANCIAL PERFORMANCE : CONSOLIDATED*

All figures in ₹ Million

Particulars	3QFY24			3QFY23			YoY change			9M FY24			9M FY23			YoY change		
Revenue	13,578	15,040	-9.7%	44,207	40,022	10.5%												
<i>Hi-Tech</i>	4,510	5,981	-24.6%	14,792	15,632	-5.4%												
<i>Plastic</i>	4,897	4,767	2.7%	16,613	11,977	38.7%												
<i>Agro Processing</i>	4,157	4,249	-2.2%	12,720	12,201	4.3%												
<i>Other</i>	14	43	-67.4%	82	212	-61.3%												
EBITDA	1,774	1,853	-4.3%	5,916	4,854	21.9%												
<i>Hi-Tech</i>	890	977	-8.9%	2,650	2,619	1.2%												
<i>Plastic</i>	493	567	-13.1%	1,828	872	109.6%												
<i>Agro Processing</i>	435	360	20.8%	1,529	1,370	11.6%												
<i>Other</i>	-44	-51		-91	-7													
Margin	13.1%	12.3%		13.4%	12.1%													
<i>Hi-Tech</i>	19.7%	16.3%		17.9%	16.8%													
<i>Plastic</i>	10.1%	11.9%		11.0%	7.3%													
<i>Agro Processing</i>	10.5%	8.5%		12.0%	11.2%													
PAT	86	-83	2x	535	-160	6x												
Cash PAT	677	503		2,311	1,590													

*Results from Continuing operations

SEGMENT REPORTING : CONSOLIDATED

All figures in ₹ Million

YoY Revenue

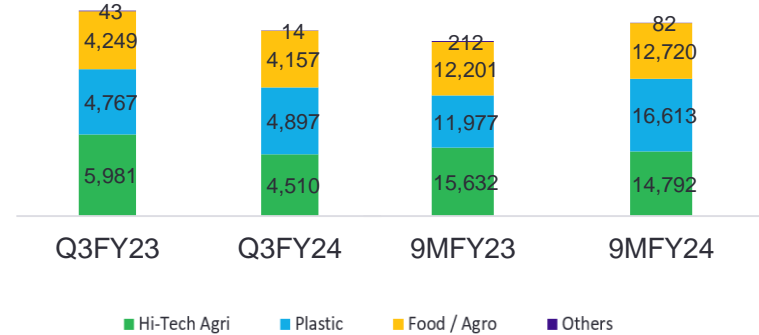


Hi-Tech Agri

During Q3FY24, Hi-Tech segment experienced 24.6% contraction, due to strategic reduction in the project business (-87%). Untimely rains in MH & KN impacted Retail business registering de-growth by 4%. However, TC business witnessed a healthy growth of 19%.

During 9MFY24, Hi-Tech segment experienced 5.4% contraction, due to strategic reduction in the project business (-59%). Retail business continued the rally and grown by 17% and TC business witnessed a strong growth by 42%.

Revenue



YoY Revenue

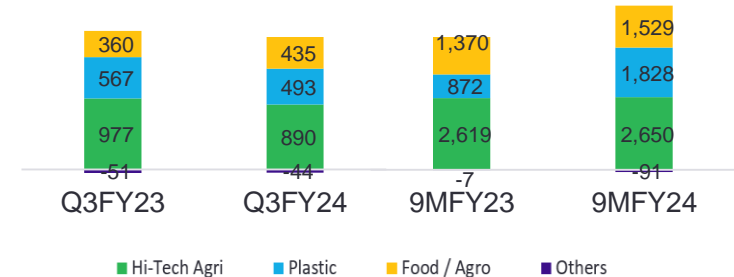


Plastic

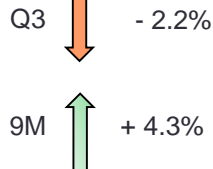
For Q3FY24, the Plastic segment reported slight revenue increase indicating resilience in a competitive environment, driven by our international plastic business despite of de-growth in India business.

On a 9MFY24 basis, the Plastic segment demonstrated impressive performance with a substantial revenue boost of 38.7%, highlighting our competitive edge and growth strategy in international and India business.

EBITDA



YoY Revenue



Food/ Agro

During 3QFY24, The Agro Processing segment emerged as a strong performer with a 20.8% increase in EBITDA and an improvement in margin to 10.5%.

During 9MFY24, Agro Processing segment demonstrated 4.3% growth with considerable growth of 11.6% in EBITDA margins.

FINANCIAL PERFORMANCE

All figures in ₹ Million

Standalone

Consolidated

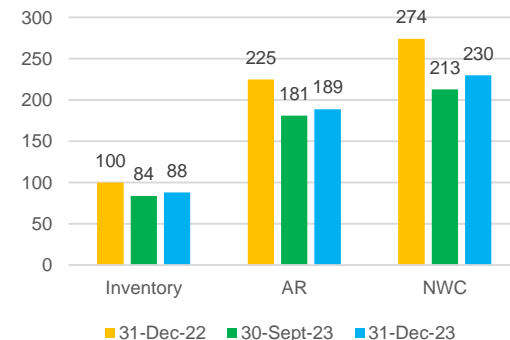
Particulars	Standalone			Consolidated		
	31-Dec-23	30-Sep-23	31-Dec-22	31-Dec-23	30-Sep-23	31-Dec-22
Non current assets	44,277	44,493	44,688	56,946	56,884	60,610
Current assets	38,616	39,278	38,320	54,895	55,503	65,405
Non current liab.	338	343	1,187	1,643	1,678	3,019
Current liabilities	9,172	9,948	8,770	14,302	17,233	20,072
Capital employed	73,383	73,480	73,051	95,895	93,477	102,924
Net worth	48,088	47,572	45,579	57,481	56,838	36,427
Borrowings [^]	25,295	25,908	27,472	38,414	36,639	66,497
Sources of funds	73,383	73,480	73,051	95,895	93,477	102,924

([^] Long Term and Working Capital)

WORKING CAPITAL CYCLE : DSO

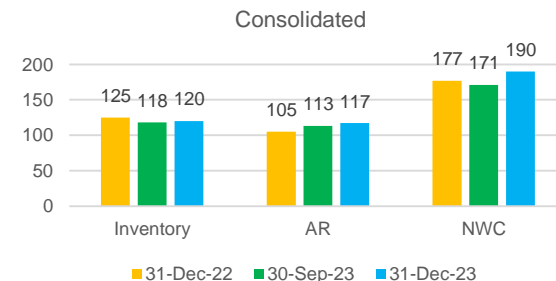
All figures in days (DSO)
Standalone

	31 Dec 23			30 Sep 23			31 Dec 22 ^		
Standalone	Inventory	AR	NWC	Inventory	AR	NWC	Inventory	AR	NWC
Hi-Tech Agri	122	266	311	110	245	269	116	270	322
Plastic	40	89	121	45	94	127	58	138	170
Total	88	180	230	84	181	213	100	225	274



The elongation of the working capital cycle days for the quarter is primarily a result of decrease in revenue.

	31 Dec 23			30 Sep 23			31 Dec 22 ^		
Consolidated	Inventory	AR	NWC	Inventory	AR	NWC	Inventory	AR	NWC
Hi-Tech Agri	121	211*	256	108	194*	218	111	127	192
Plastic	49	63	96	51	69	102	60	85	118
Agro/Food	208	65	222	214	56	184	220	57	183
Total	120	117	190	118	113	171	125	105	177



* (i.e. excludes AR from discontinued operations)

^ Consolidated numbers for 31-Dec-22 includes current assets and liability of discontinued operations Accordingly, the numbers are not comparable with corresponding Sep 2023 & Dec 2023.

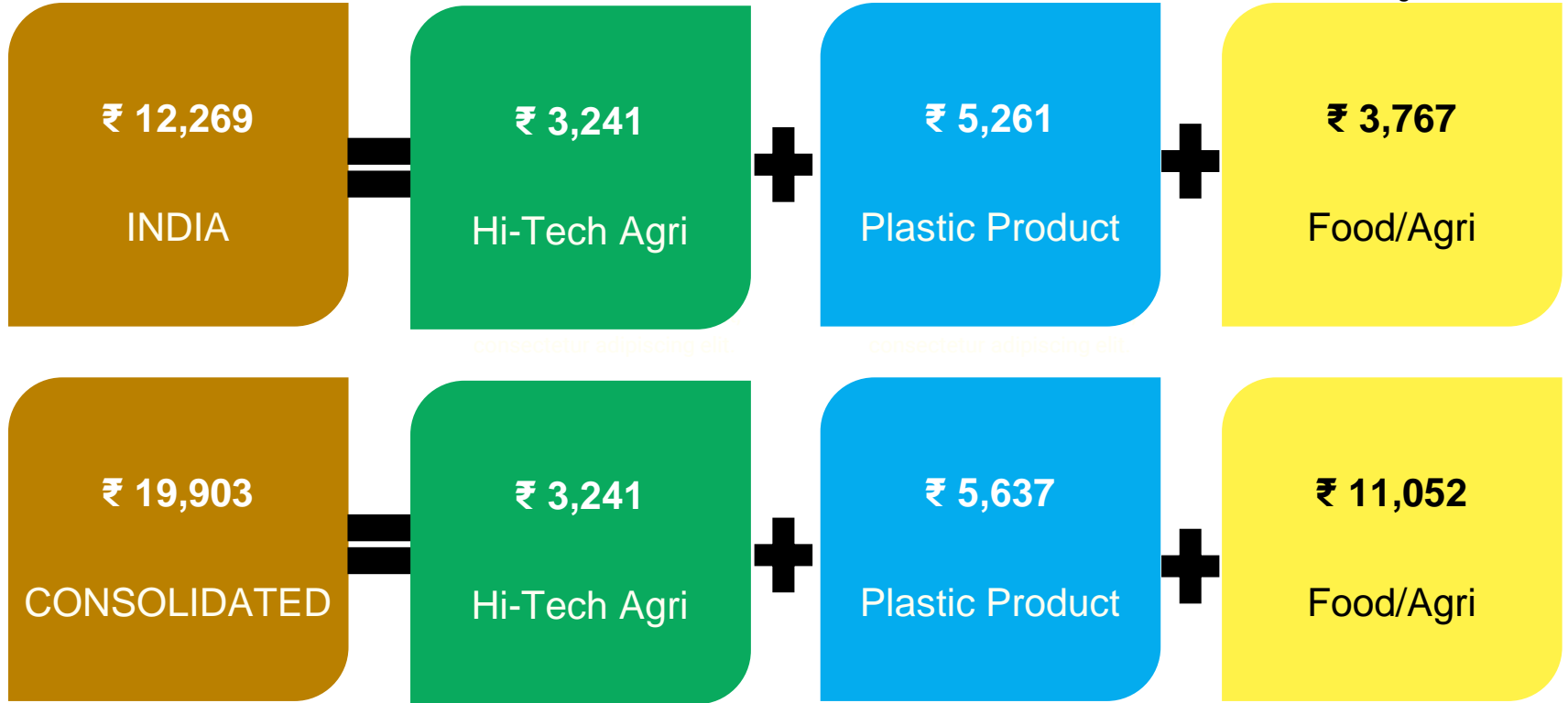
STANDALONE DEBT PROFILE AS ON 31 DECEMBER 2023

All figures in ₹ million

Particulars	Outstanding	Outstanding	Repayment Schedule				
	31 Mar 23	31 Dec 23	Q4FY24	FY25	FY26	FY27	FY28
Long Term Debt							
Term Loans	5,423	4,348	718	1,804	1,826	-	-
NCDs @0.01%	9,983	8,553	-	-	-	7,155	1,398
Sub Total	15,406	12,901	718	1,804	1,826	7,155	1,398
Fund Based Working Capital	15,010	14,972	-	-	-	-	-
Inter Corporate Deposit	484	-	-	-	-	-	-
Total Debt	30,900	27,873					
Less: Impact of FV gain of 0.01% NCDs	(3,500)	(2,579)					
Reported Debt	27,400	25,294					

ORDER BOOK POSITION

All figures in ₹ million



This Order book does not factor the orders received by the company on a daily basis from Retail business.

MANAGEMENT COMMENTARY

“Leave this world better than you found it.” – Shri. Bhavarlal H Jain

India is witnessing challenges due to global warming which is resulting in untimely rains and drought conditions impacting agriculture and related businesses. It has impacted farmers doing value added agriculture as well.

For the first 9 months, Company has posted double digit growth in revenue & much higher level growth in EBITDA across all business segments.

In last quarter, overall demand from rural segment has remained subdued. There was a noticeable decrease in liquidity among farmers, stemming from a decline in the market prices of key commodities such as cotton. Even though India's long term story of robust consumption remains intact, the company witnessed lower demand in its key markets like Maharashtra & Southern India resulting in lower revenue during the quarter. In addition, Company has de-growth in revenue as its project business has reduced as per declared strategy. However, with our focus on retail and innovative products, the company could maintain its earnings.

We believe this is temporary and the demand will revive in next few quarters. Structurally we are moving in right direction with sustained growth and optimum leverage under new business model.

Anil Jain
Vice Chairman & MD

OUR GALLERY



OUR GALLERY



Jain Drip

MORE CROP PER DROP®



Jain PE Pipes
Your Lifetime to Prosperity®




J-Turbo Line® Super



Jain Drip + Jain Tissue-Culture

BETTER YIELD GREATER PROFITS

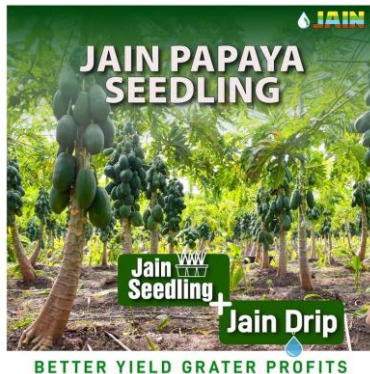


Quick Connect PC+ Pipes
Better B-Sure. Never Be Sorry!

Quick Connect
The only connection device in the world that is designed to be used in the field. It is easy to use, easy to transport, flexible and safe.

Built to Last
The only connection device in the world that is designed to be used in the field. It is easy to use, easy to transport, flexible and safe.

Unique Design
The only connection device in the world that is designed to be used in the field. It is easy to use, easy to transport, flexible and safe.



JAIN PAPAYA SEEDLING

Jain Seedling + Jain Drip

BETTER YIELD GREATER PROFITS



More Crop Per Drop



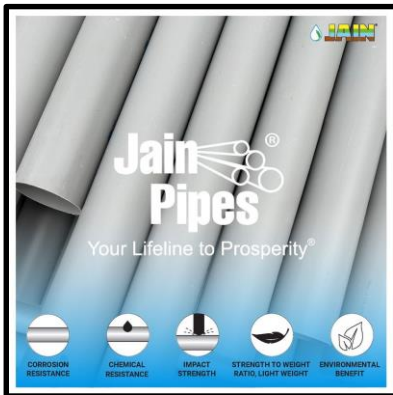
JAIN SPRINKLER PIPES

Quick Connect PC+ Pipes
Better B-Sure. Never Be Sorry!

- Wide Range of Quick Connect® Portable Joints
- Innovative Design & Sealing Ring
- Light Weight, Yet Strong & Robust
- Advance Manufacturing

TWO YELLOW LINES A SIGN OF QUALITY

OUR GALLERY



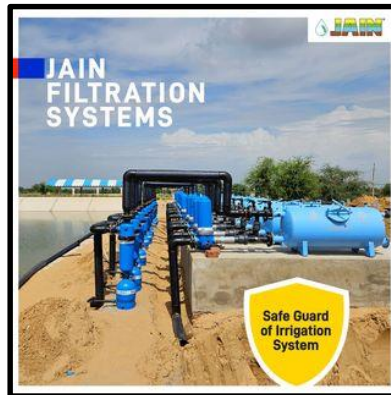
Jain Pipes
Your Lifeline to Prosperity®

- CORROSION RESISTANCE
- CHEMICAL RESISTANCE
- IMPACT STRENGTH
- STRENGTH TO WEIGHT RATIO, LIGHT WEIGHT
- ENVIRONMENTAL BENEFIT



NUTRICARE is extremely reliable, accurate and automated fertigation equipment ideally suitable for precision agriculture.

NUTRICARE Automatic Fertigation System



JAIN FILTRATION SYSTEMS

Safe Guard of Irrigation System



J-TURBO KEY SUPER

Jain Drip

8 LPH 14 LPH



AcuRain 5022 SDU

Patented Super Diffuser Plate
Unique barrier with 30 super-diffuser plate design for uniform distribution

Sprinkling Prosperity with Every Drop



J-SC PC-PLUS EMITTER

Jain Drip



JAIN DWC PIPES FOR DRAINAGE AND SEWERAGE

Drain well Corrugated Pipes



THE BEST DESIGN REGISTERED NEW PRODUCT

Jain Irrigation has developed a novel sprinkler irrigation system which uses best of engineering plastics. It overcomes all the limitations and maintenance issues faced in existing sprinkler set.

TUF RISER

Higher Coverage Higher Performance!

AWARDS AND EVENTS



Dr. Annasaheb Shinde Memorial Award presented to Jain Irrigation.

07-Jan-2024 Jalgaon: Pioneer of Green Revolution Dr. Annasaheb Shinde Memorial Award was presented to Jain Irrigation System Ltd. Ashok Jain, Chairman of the Company accepted the award during the birth centenary celebrations of Sahakar Maharshi Bhausaheb Thorat.

On the occasion of the birth centenary of Sahakar Maharshi Bhausaheb Thorat, various programs and award ceremony were organized at Sangamner. Former Chief Minister Prithviraj Chavan presided over the program while Maharashtra Congress in-charge Ramesh Chennithala, Karnataka Minister HK Patil, Congress Legislature Party Leader Balasaheb Thorat, MLA Jitendra Awad, Bhaskar Jadhav, former Legislative Council Member Dr. Dignitaries including Sudhir Tambe were present. On this occasion, the award was distributed by dignitaries. The awards are in the form of a shawl, a certificate, a cheque of one lakh.

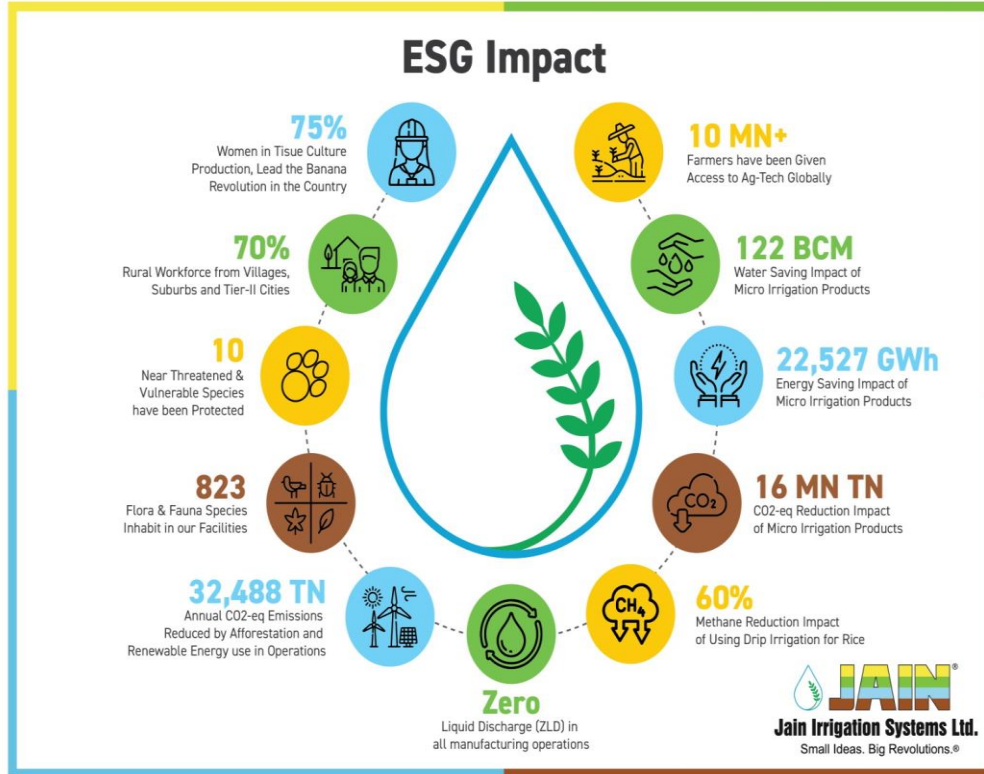


Good response to 'हायटेक शेतीचा नवा हुंकार' at Jain Hills

On the occasion of the birth anniversary of Padma Shri Bhawarlalji Jain, the founder of Jain Irrigation, the "Hi-Tech Agriculture Festival-हायटेक शेतीचा नवा हुंकार" was organized by Jain Irrigation Systems Ltd. at the Agricultural Research and Development Center on Jain Hills from 10 December 2023 to 22 January 2024. More than 61,000 farmers, agricultural experts, and researchers from various parts of the country, including the state of Madhya Pradesh, Gujarat, Karnataka, Rajasthan, Himachal Pradesh, Haryana, and Andhra Pradesh have visited the exhibition. These people have studied modern and new technologies in agriculture, and this festival has proved to be a boon for agriculture and farmers.

[For more info. Click here](#)

ESG IMPACT



- ✓ Commitment to global sustainability through robust ESG initiatives.
- ✓ Integration of ESG into core operations aligning with global sustainability goals.
- ✓ Protection of 10 near-threatened and vulnerable species, enhancing biodiversity.
- ✓ Strengthening global food security and farming practices through technology.
- ✓ Significant contribution to global water resource management.
- ✓ Direct impact on reducing global warming potential.
- ✓ Achieving Zero Liquid Discharge (ZLD) in all manufacturing operations.
- ✓ Preventing water pollution and highlighting water use efficiency.
- ✓ Active role in conserving ecological balance.

CSR UPDATE

Jain Irrigation Systems Limited (JISL) has actively engaged in various Corporate Social Responsibility (CSR) activities during the current financial year, focusing on rural development, education, sports, environmental conservation, hunger eradication and pandemic support. Below are the key highlights of our CSR initiatives:

Rural Development

- **Engagement in Rural Development Activities:** JISL has made significant contributions towards rural development, including support for projects and initiatives that aim at improving the quality of life in rural areas.
- **Representation of Rural Development Issues at G-20:** Through collaborations with NGOs, JISL has played a role in highlighting rural development issues on the global stage, specifically during the G-20 summit, showcasing their commitment to addressing rural challenges.
- **Contribution to Ba-Bapu-150 Project:** As part of their commitment to preserving cultural heritage and promoting rural upliftment, JISL has contributed to the Ba-Bapu-150 project, commemorating the 150th anniversary of Mahatma Gandhi and Kasturba Gandhi.
- **Conservation of Natural Resources:** JISL has undertaken initiatives focused on conserving natural resources and improving the quality of soil, air, and water, demonstrating their dedication to environmental sustainability.
- **Rejuvenation of City Gardens:** The company has been involved in rejuvenating city gardens by increasing tree cover, improving waste handling, and raising awareness about environmental and cultural values, contributing to the beautification and ecological balance of urban areas.

Promoting Education

- **Support to Anubhuti English Medium School:** JISL has contributed to enhancing educational opportunities for children by providing support to Anubhuti English Medium School, ensuring access to quality education.
- **Contribution to Gaurai Krushi Tantra Niketan, Wakod:** By supporting Gaurai Krushi Tantra Niketan in Wakod, JISL aims to promote agricultural education and training, fostering the next generation of agricultural professionals.
- **Future Agriculture Leaders of India (FALI) Program:** The FALI program is designed to nurture young agripreneurs, equipping them with the skills and knowledge necessary to lead the future of agriculture in India.

CSR UPDATE

Promoting Sports

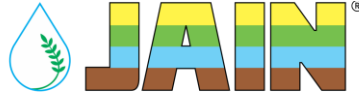
- **Support to Jain Sports Academy:** JISL has provided direct support to the Jain Sports Academy, covering the expenditures of coaches and players, and supplying sports materials and covering tournament fees. This initiative emphasizes the company's commitment to fostering sports talent and promoting physical well-being among the youth.
- **Pandemic Support and Hunger Eradication**
- **Snehachi Shidori Initiative:** In response to the pandemic, JISL launched the Snehachi Shidori initiative, providing food to patients, workers, laborers, migrants, and their families in Jalgaon City, addressing hunger and supporting those affected by the COVID-19 crisis.

These CSR activities reflect Jain Irrigation Systems Limited's holistic approach to corporate social responsibility, demonstrating our commitment to societal welfare, environmental sustainability, and the overall development of the community.

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Let's meet on "Q3 FY24 Earnings Conference Call"

On Monday, 12th February, 2024 at 03:00 PM IST

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