



*Reimagining a
healthier planet!*



An Overview

NOVEMBER 2023



WE BUILD THIS TOGETHER!



OUR STORY THROUGH the GENERATIONS

WHERE WE CAME FROM...

WHERE WE WANT TO GO...



COURAGE & DETERMINATION

BUILDING A LEGACY

PI of the FUTURE MULTI-ENGINE GROWTH

CHEMISTRY TECH DIGITAL PEOPLE



CHEMIST at HEART
CUSTOMER DELIGHT

12 YRS OLD
FRESH FRUITS + VEGGIES
12 YRS OLD
LEADING INDUSTRY

RESILIENCE CREDIBILITY

SET UP PESTICIDES ASSOCIATION OF INDIA



MEET IN JAPAN
LET'S TALK
GLOBAL REPUTATION
NAKAWO-SAN

TECH VENTURES

DIVERSIFICATION OF BUSINESS
ENERGY METERING
MINERAL PROCESSING
POLYMER COMPOUNDS

GROWING CREDIBILITY



ESTABLISHED GLOBAL PARTNERSHIPS

INVESTING for the FUTURE



BOLDNESS

ENTREPRENEURSHIP

COURAGE TO GROW
CHALLENGE STATUS QVO
LARGEST SELLER PHOSPHATE GLOBALLY

CHALLENGE STATUS QVO
CUSTOMER DELIGHT NOMINEE

IMPACT ON FARMERS
IMPACT ON SOCIETY
PIONEER NEW TECH
BENEFIT COMMUNITY
SUPPORT ENVIRONMENT
VALUE CREATION LEADER IN INDUSTRY

CSM GROWTH
WE WILL MAKE IT HAPPEN!
GLOBAL RESPECT RECOGNITION

MARKET GROWTH
COURAGE TRANSFORMATION



ENTREPRENEURSHIP

IT'S OUR DUTY TO BUILD ON THE FOUNDATION and GROW the LEGACY
STRONG FOUNDATION

APPETITE TO INVEST

DIGITAL & AGILE

1st AGROCHEM PLAYER TO IMPLEMENT DCS SAP
PIONEERED CSM + DISCOVERY AG CHEM
SALES
PIONEER DIGITAL PLATFORMS
DIGITIZED PLANTS

COURAGE & INNOVATION

1946 ... PLANT the SEED
1965
1979
1995
DIGITAL
SET UP IN JAPAN
PARTNERSHIPS WITH COMPETITORS
100+ PATENTS
AGRO CHEM
AGRO SOLUTIONS

The mantra for growth the PI way ..

“What has brought us here, won’t take us there”

Focused on the future, not defined by its past

- *“We are as old as independent India” 75 years +*
- **Pioneers** in our space
- **First to digitize** the various functions of the organization
- **Technologically enabled** for efficiency
- Driven by **unrelenting ambition**
- Takes pride in being a **progressive, inclusive organization**

Channel restlessness to deliver excellence

- Driven by **clear internal goals**
- **Speed & agility**
- Sensitive handling of **complex processes**
- **Transparency**
- Committed to **sustainability**

Internal characterization of PI

- A company that operates in a **different league**
- Has legacy yet a **startup mentality**
- Sets itself apart from its competitors .. constant setting **global standards & processes**
- Belongs to the **league of innovators**

A belief in sustainability is a culture rather than an obligation

- Much before **sustainability** became a buzzword we started our journey .. **Our passion ..**



Rewards & Recognition

Chairman at CII-NR

Mr. Mayank Singhal appointed Chairman at CII-NR Regional Committee on Agriculture Food Processing & Dairy for FY23



Almedalen, Sweden

Mr. Mayank Singhal delivered the keynote address at flagship annual event 'Engaging India'



Golden Peacock National CSR Award 2022

A testament to PI's successful purpose-driven and innovative CSR interventions



Golden Peacock Quality Award 2022

PI's constant innovation and quality standards set the benchmark in the industry



Karkhana Suraksha Puraskar Award 2023

A testimony to the exceptional safety standards PI consistently maintains



PI Industries Ltd., Udaipur wins Gold Award in R&D sector

under the Apex India Occupational Health & Safety Award 2023





Reimagining a healthier planet!



Lead with science, technology and human ingenuity to create transformative solutions in life sciences



Courageous

Think *Bold*, act with *Integrity* and be *Accountable*.



Curious

Question conventional wisdom, be *Open-minded*, *Adaptable* and *Curious*.



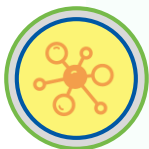
Creative

Differentiate, *Collaborate*, *Experiment* and *Execute ideas at speed*.



Caring

Be *Transparent*, build *Trust*, bring the best out of *People* and embrace *Sustainability*.



Partner Centric

First to identify & deliver on latent needs of our customers



Science & Technology Driven

Sustainable solutions by early adoption of cutting-edge science / technology



Digital Edge

Integrated digital solutions to gain competitive advantage



People First

Best opportunities for employees to learn & grow



ESG Anchored

ESG as a way of life



Business model built on the principles of respect for IP and Partnerships



Zero attrition in partnerships

Partnership spanning > 5 decades

> 79% customer satisfaction score among B2B partners recorded in FY22

Symbiotic partnerships with 20+ global innovators

Pioneering the identification and fulfilment of unmet needs for our valued partners

Non conflicting business model ... well respected by Global Innovators as Partners



Who are we? In Crop Protection, we are the only..

Indian Major..

25 Stock Points
10,000+ Distributors
80,000+ retail points



..with World-class manufacturing..



..Engaged in leading edge innovation



We succeed because of..

Deep Talent

4000+ Total Employees
48% Workforce <Age 35 Yrs
35% Post-Graduates
185+ Doctorates
32% Top Mgmt > 5 years PI Exp
7% Women Employees

Long Term Commitment



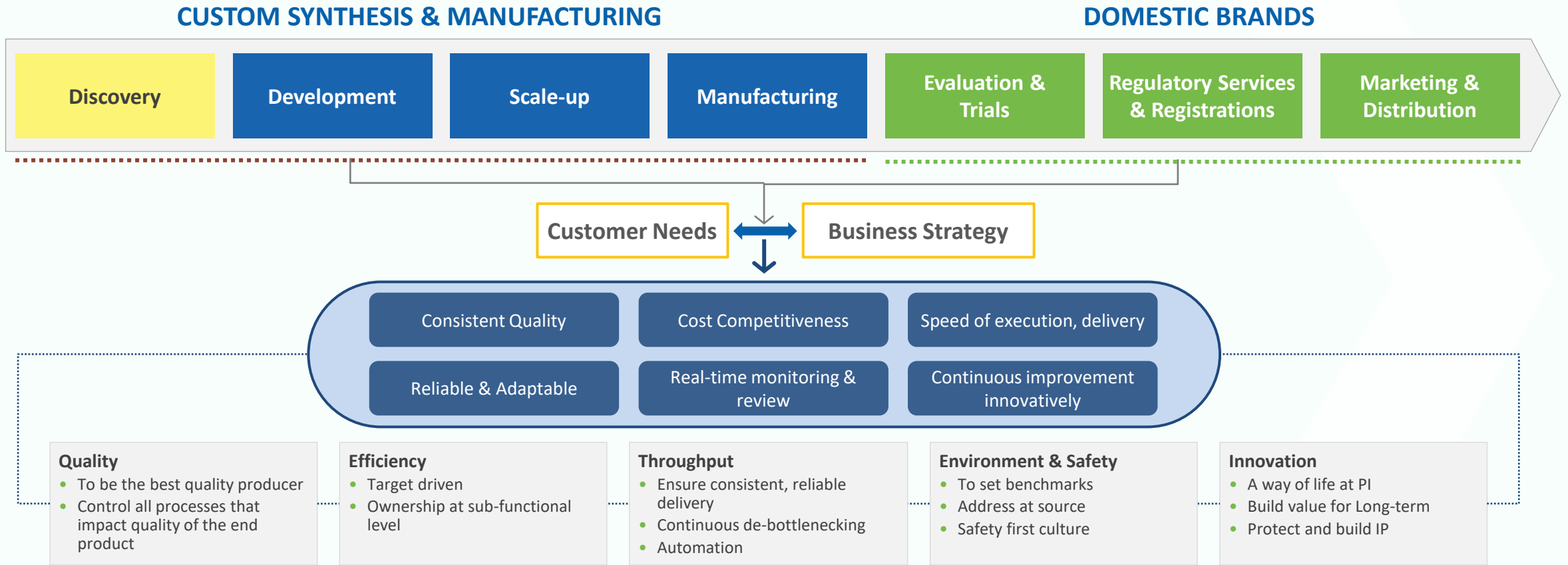
Partnering Model



Visionary Leadership



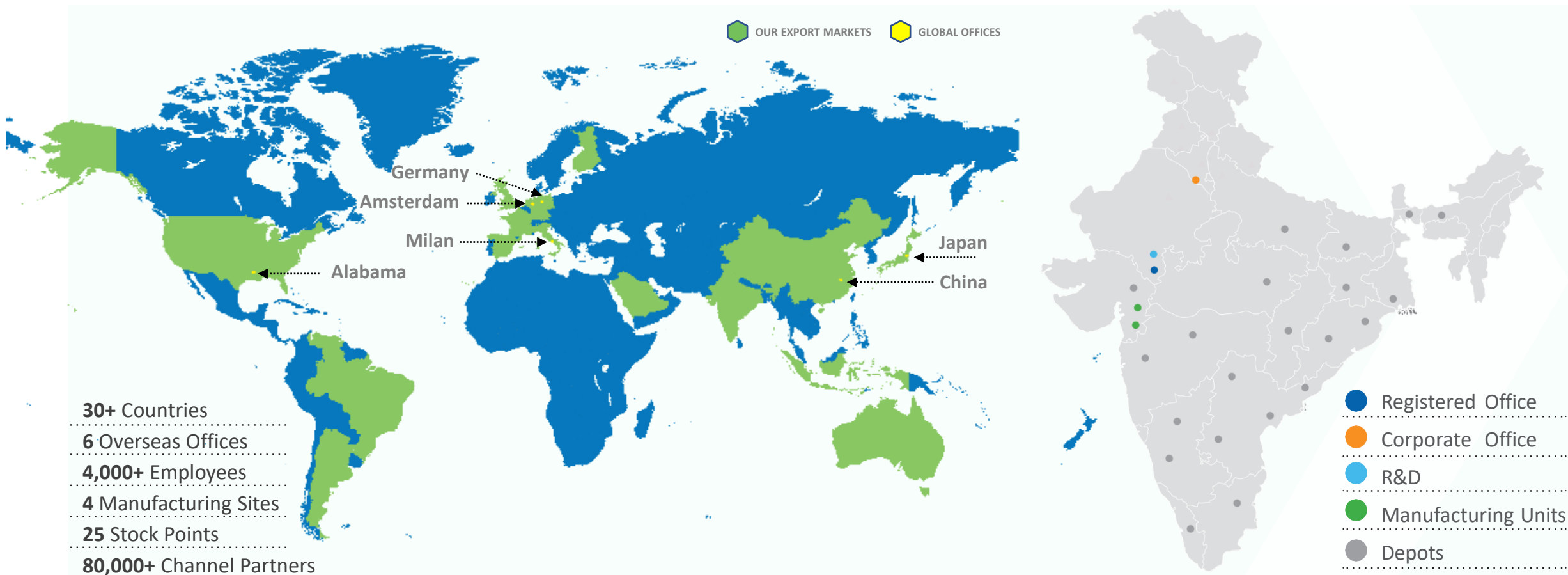
Partnering across the AgChem value chain



Strong focus on customer needs and continuous innovation



Global presence & markets served



Strong understanding of international work culture with > 5 decades of experience and deep-rooted relationships



PI has all that is required to be your Partner of Choice

We meet

**CUSTOMER
EXPECTATION**

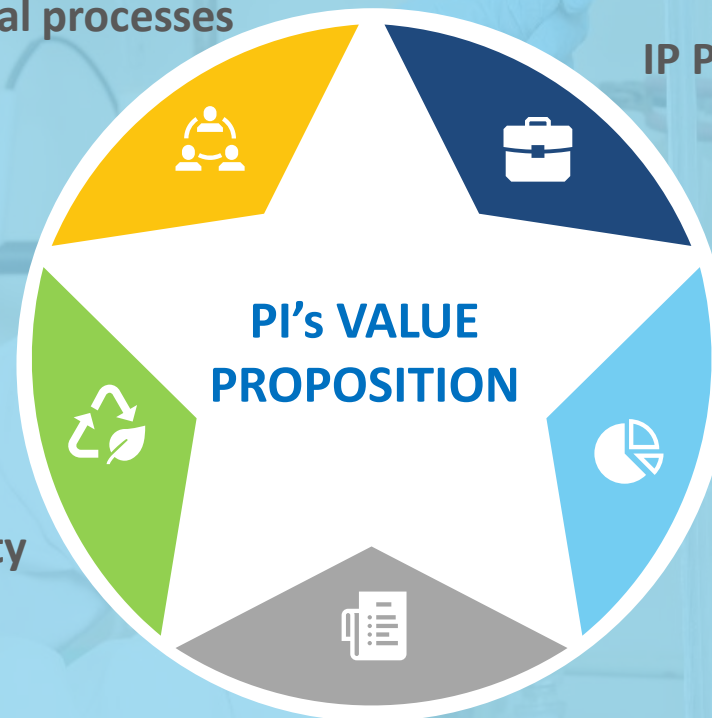
by turning them into

COMMITMENTS



Deep Talent / Expertise
across all chemical processes

IP Protection



Sustainability

Cost Efficiency

Robust Systems &
Processes



World-class R&D set up and technological capabilities enabling future business pipeline

R & D

State-of-the-art R&D Lab at Udaipur

Specialized department of **IT experts** focusing on advanced data management

Kilo Lab & Pilot Plant



Fulfilling **Customer needs** for semi-commercial production for **Product Development** and scale-up
15+ multicapacity reactors with various MOCs (SS-316, MSGL, etc.)



500+ Scientists & Researchers incl. **120+** Doctorates

NABL ISO 17025 Accredited and GLP certified

40+ Products at different development stages

~25% of the new enquiries from non-Agchem space

145+ Patents filed

4 New Products Commercialized in FY23

In-house library with a vast array of knowledge resources





Agri



Industry Overview

1

GLOBAL AGRICULTURE

- CAGR- 9.4%
- Expected to grow from \$12,245 (2022) to \$13,398 (2023)
- Food & Agri- 35% of all jobs & 4% of Global GDP
- Inclining towards net-zero emissions, nature positive goals, and dignified life to all by 2030

2

INDIAN AGRICULTURE

- CAGR- 4.6%
- Agri-dependent economy catering to more than 50% population
- Largest area under wheat, rice and cotton
- Leading producer in Spices, Pulses, Tea, Milk
- Food security to nutritional security

3

CHALLENGES IN AGRI-INDIA

- Low yields
- Insufficient farm mechanization
- Inadequate irrigation
- Poor adoption of modern agronomy

4

AGRI-CHEMICAL SECTOR

- Globally pegged at \$235.2 billion
- Expected to grow by 3.7% for next 5 years
- **INDIA**- 5th largest producer, 4th largest exporter, 13th largest importer
- Indian Agro-Chemical Market- \$6 billion (to grow at 8.5% till 2028)
- Exports account for 53% of total revenue

CHALLENGES

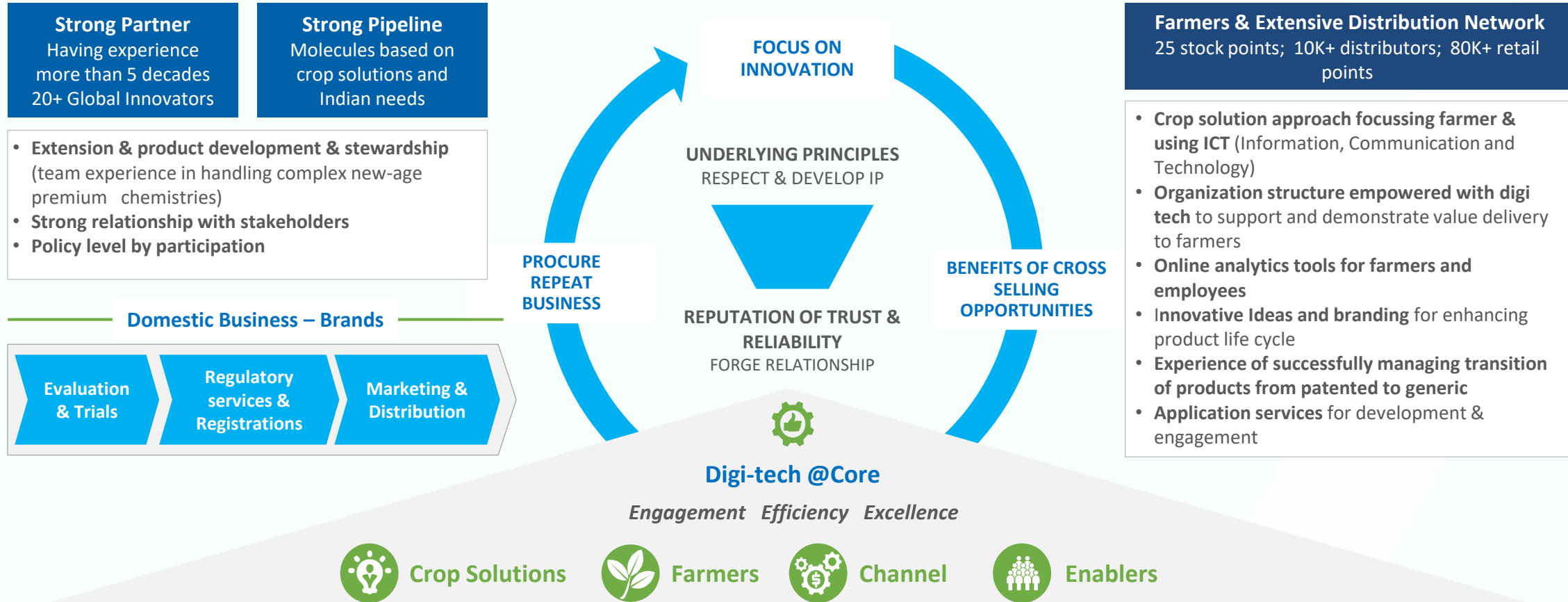
- Counterfeit Agro-Chemicals
- Poor quality standards
- Inadequate testing protocols
- Indian Agro-Chemical Market- \$6 billion (to grow at 8.5% till 2028)



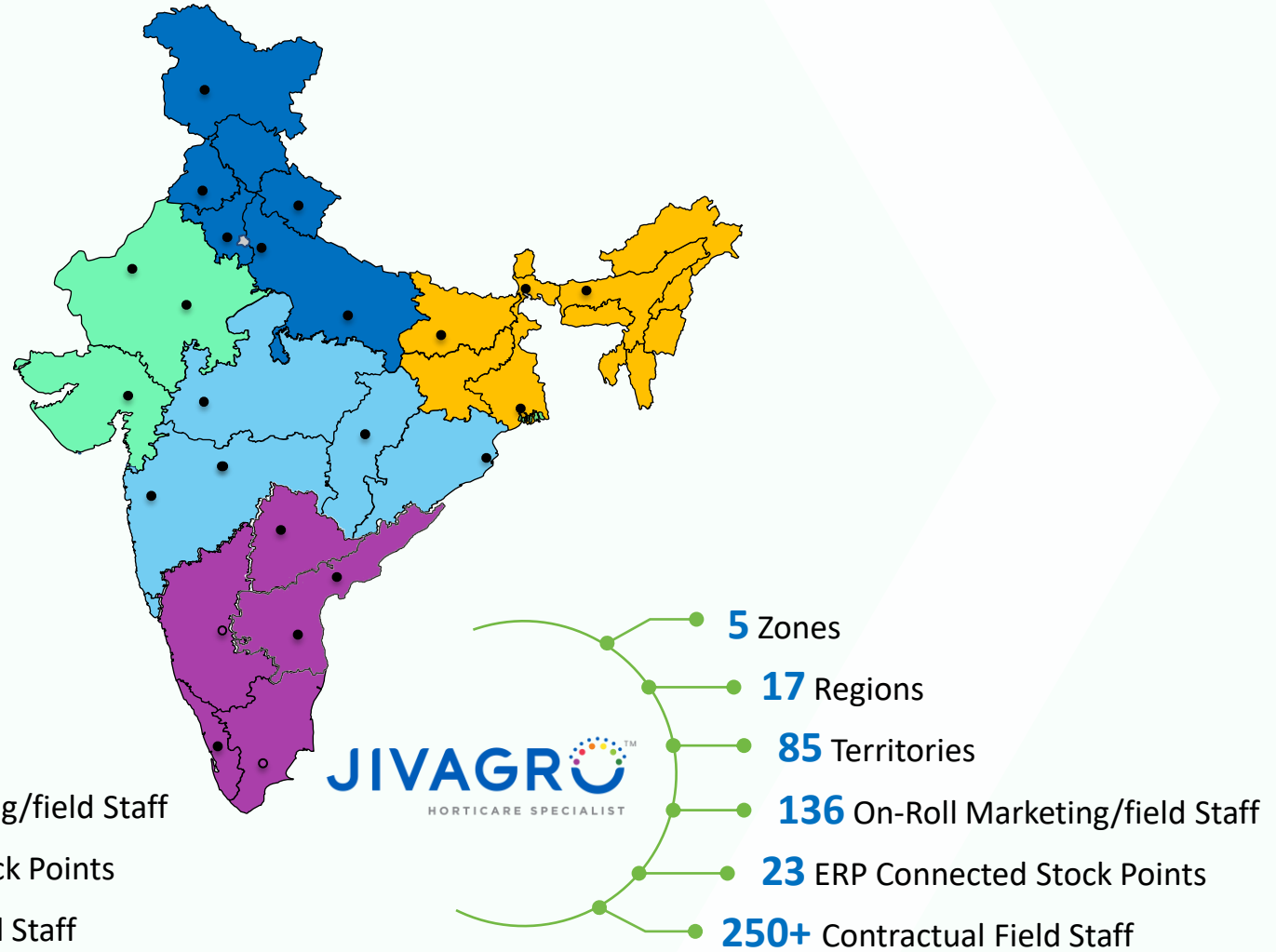
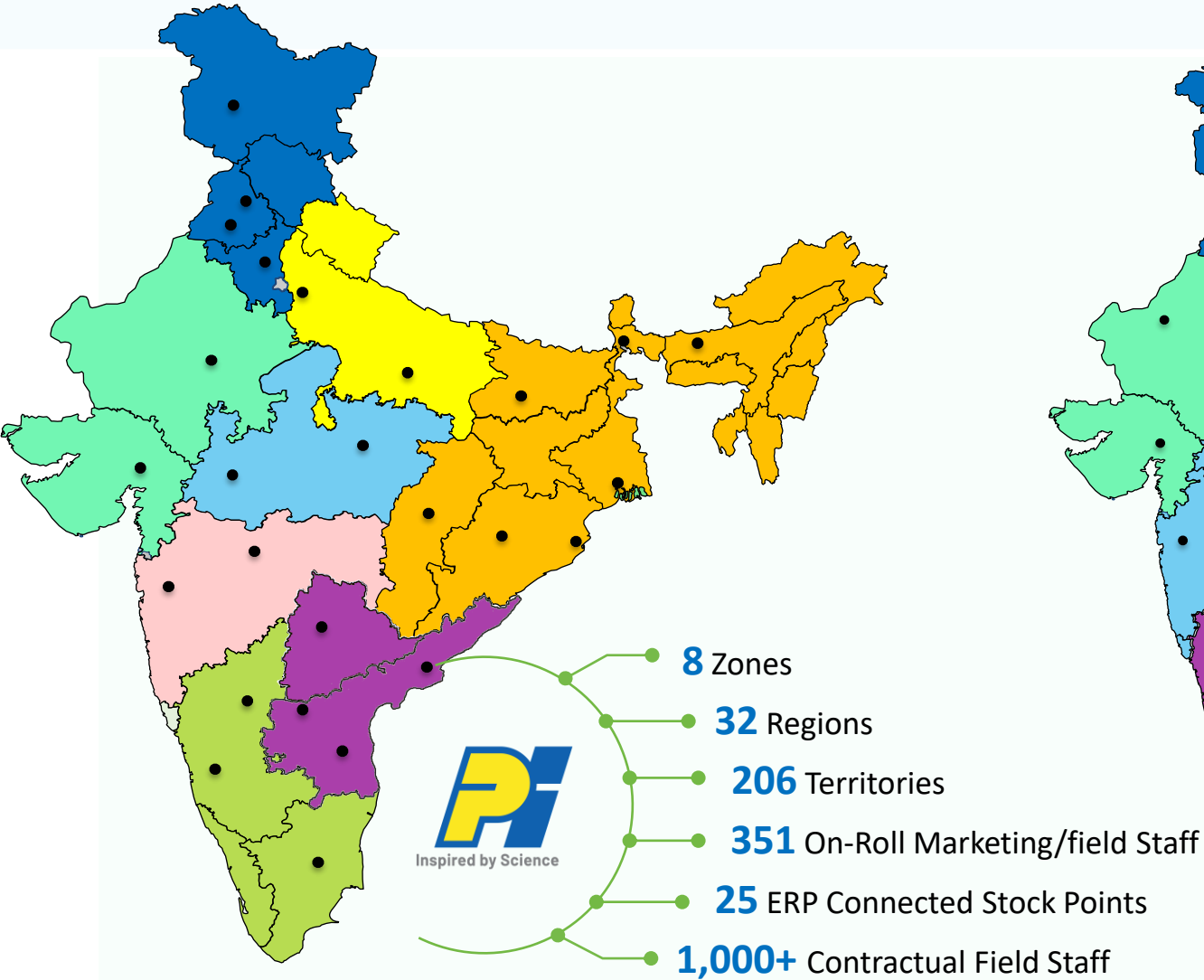
Differentiated Domestic Distribution Model

Driven by Unique Solutions through Global Partnerships, Brands Building Capabilities and Market Reach

More than 5 decades creating market-leading brands
 Significant revenue from Brands ranked No. 1 or 2 in the market, some brands are more than a decade old



Agri Distribution Network



PI - A leading player in the Agrochemicals space

	Market Leadership	01 ➤	PI Industries features among top 5 agrochemical players in India
	Research and Manufacturing Prowess	02 ➤	Among the first few to set up agrochemical formulation Lab in India (1960), with continuous investment in manufacturing capacity
	Vast and Robust Distribution Network	03 ➤	25 Stock points, 10,000+ Dealers & Distributors and over 80,000+ retail network. PI's presence is spread across whole India
	Strategic Partnership	04 ➤	Strategic partnership with Industry bodies, farmers and cooperatives. Our partnership is built on TRUST & SUSTAINABILITY and aims to increase the stakeholders' value
	End-to-End Solution	05 ➤	PI caters to all needs of its partners ranging from Research to Marketing & Manufacturing to Distribution

PI has a deep understanding of INDIAN FARMERS and their preferences



Inspired by Science

Robust product portfolio for all major crops



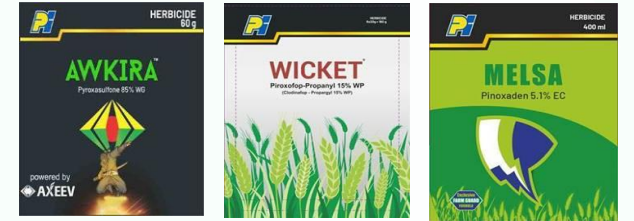
HORTICULTURE



RICE



SOYBEAN



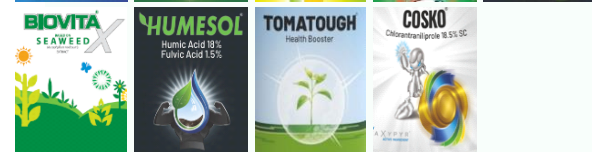
WHEAT



CHILLI



COTTON



CORN



Community Outreach

Committed to CSR (Corporate Social Responsibility)



Numbers in FY23



 **18,835**
Farmers benefitted

 **13,178 acres**
Brought under sustainable cultivation

 **91,734**
Medical treatments administered through Mobile Health Units

 **7,000**
Women beneficiaries empowered

 **506**
Women-led SHGs formed

 **5,508**
Women reached through financial inclusion initiative

Employee volunteering

 **Employee volunteering 347 hours**
Blood donation camp organized in Jambusar and Panoli

 **~30,000**
Tree plantation drive conducted in March 23 in Ankleshwar



Why Join PI

Employee Engagement and wellbeing Activities: At PI Industries, every day is a celebration

1 Festival Extravaganza

- Diwali, Holi, and other festive celebrations
- Special Women’s Day events



Diverse celebrations

2 Outdoor and Indoor Sports

- Unleash your competitive spirit

Yoga Sessions

- Rejuvenate with wellness



Well-being

3 PI Founder’s Day

- Celebrate the spirit of PI Industries

Corporate Town Halls

- Transparent & inspiring discussions



Corporate Unity

4 World Environment Day

- Tree Plantation Drive
- Cleanliness drives



Community Involvement

A Dynamic culture: Where innovation meets purpose, ideas thrive, and a supportive community fuels your growth

Impactful Purpose:
Redefining the future and contributing to a healthier planet

1

Innovative Environment:
Scientific excellence and cutting-edge technologies, fostering continuous learning and growth

2

Openness for Diverse Perspectives: where unique perspective is not only valued but celebrated

3

Collaborative Community: A community that thrives on collaboration, where experimentation is the key to unlocking new possibilities

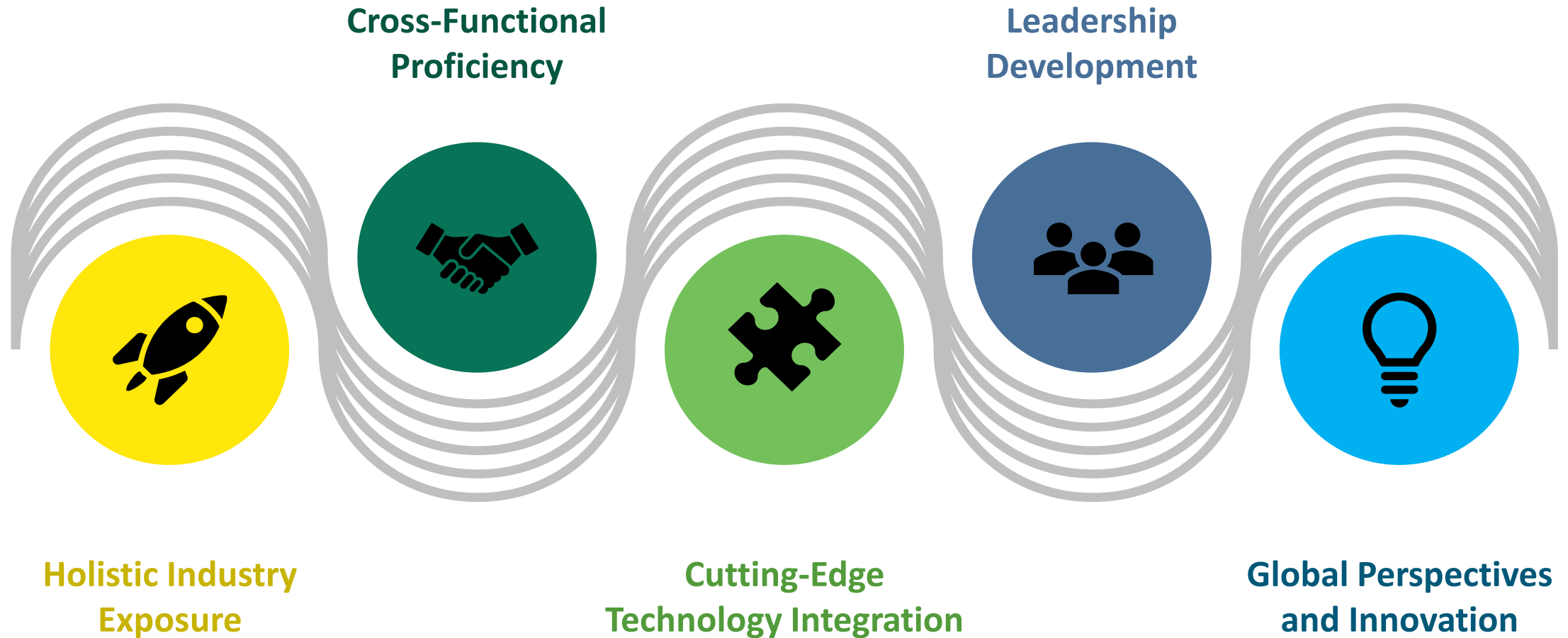
4

Caring Culture:
Experience a workplace where care, compassion, and trust create a supportive and uplifting environment




5





Elevate Your Learning Journey as a Executive Trainee



Recruitment Process and offering

<p>Resume Shortlisting</p>		<p>The first level shortlisting will be based on resume.</p>
<p>Group Discussion</p>		<p>Shortlisted candidates would go through one round of GD on relevant topics.</p>
<p>Personal Interview</p>		<p>Further, candidates clearing the GD round would be having one rounds of interviews.</p>

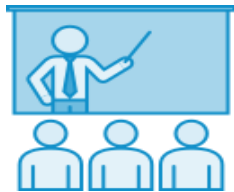
<p>Position Offered</p> 	<p>Executive Trainee – Sales</p>	
<p>CTC</p> 	<ul style="list-style-type: none"> ➤ Year 1 – Executive Trainee – INR 6 Per Annum (INR 5 lacs fixed and INR 1 Lac incentive) ➤ Year 2 – Once absorbed as Territory Incharge* (CTC – INR 9 Lacs per annum – INR 6 Lacs fixed & INR 3 Lacs incentives) <p>*Growth from ET to TI will be based on candidate performance and available vacancies. Individual Capability will be considered</p>	

Executive Trainee - One Year Journey



1. On boarding and Induction

- Diverse Locations
- Essential Trainings
- Meet Leaders
- Campus to Corporate



2. Business Induction Unveiled

- Personalized Alignment
- Strategic Insights



3. Project & Review

- Project allocation with mentorship
- Quarterly Cadence
- Diverse Committee
- Transparent Progress



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Thank you.

