



**APOLLO
TYRES LTD**



apollo
TYRES

VREDESTEIN
TYRES

Investor Presentation | June 2023

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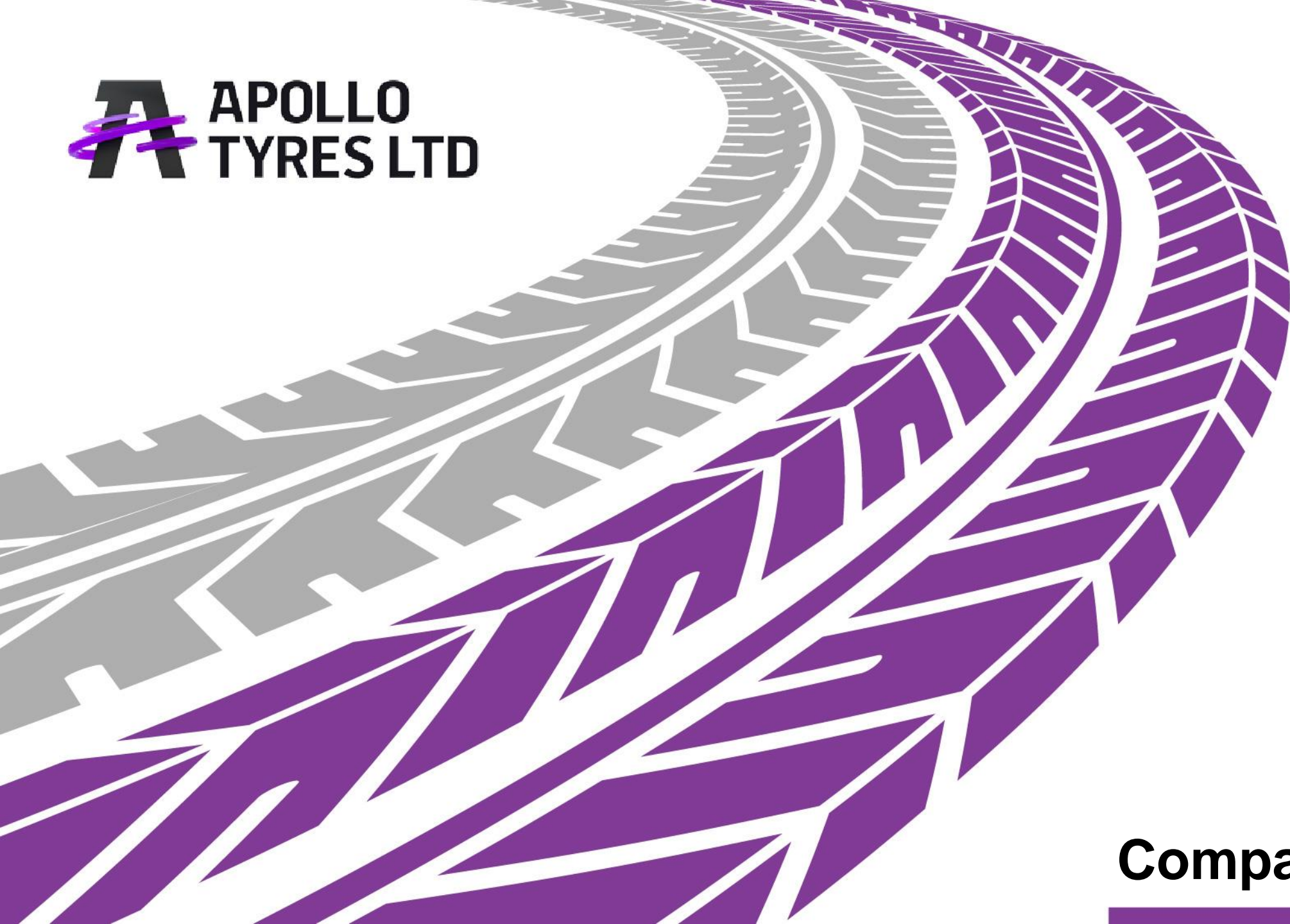
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Company Overview

Apollo Tyres Snapshot (FY23)



INR 245,681 Mn
Revenue



15%
3 Yr Revenue CAGR



INR 33,137 Mn
EBITDA



20%
3 Yr EBITDA CAGR



INR 11,044 Mn
PAT



32%
3 Yr PAT CAGR



26%
Dividend % of Net Profit
Dividend – INR 4.50/share



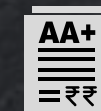
INR 6,369 Mn
Free cash flow



10.1%
RoCE



1.4x
Net Debt/EBITDA



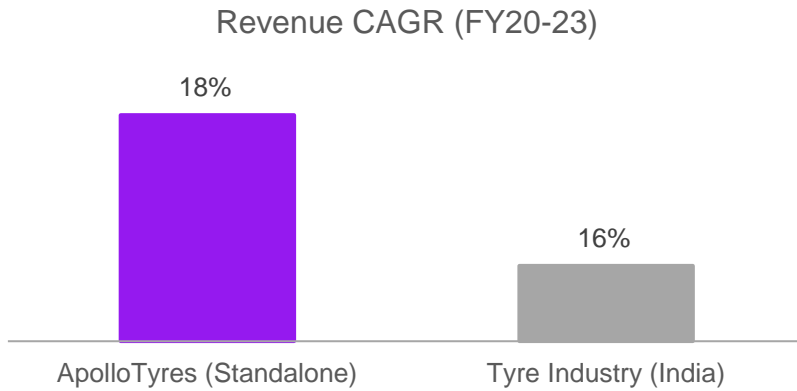
AA+ (LT), A1+ (ST)
Credit Rating CRISIL



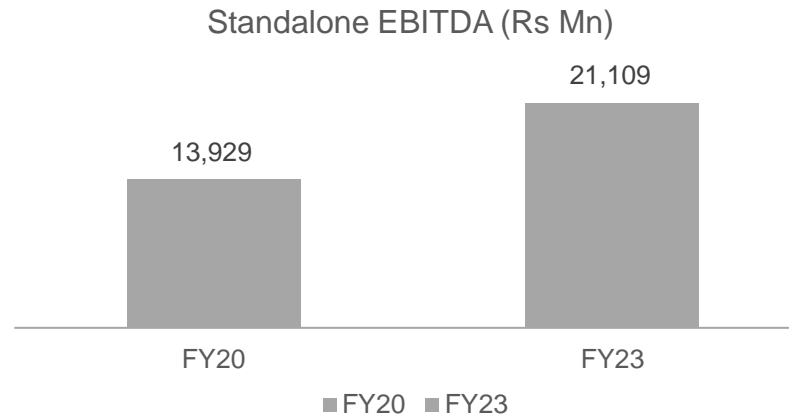
B
CDP Score
(taking action on climate issues)

Strong execution – track record of superior performance

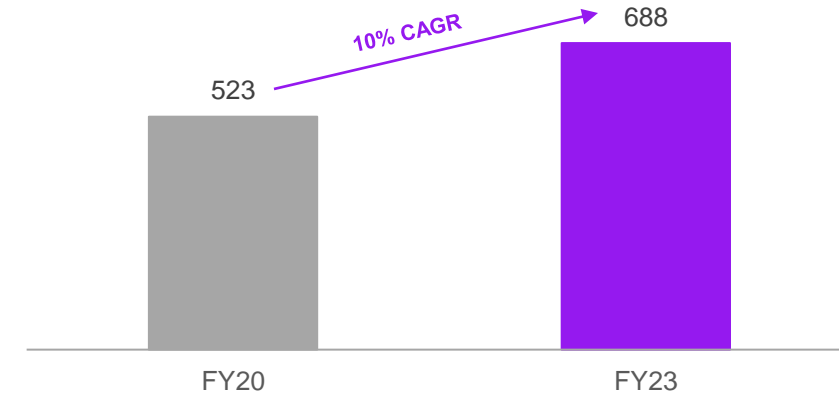
Superior revenue performance in India¹



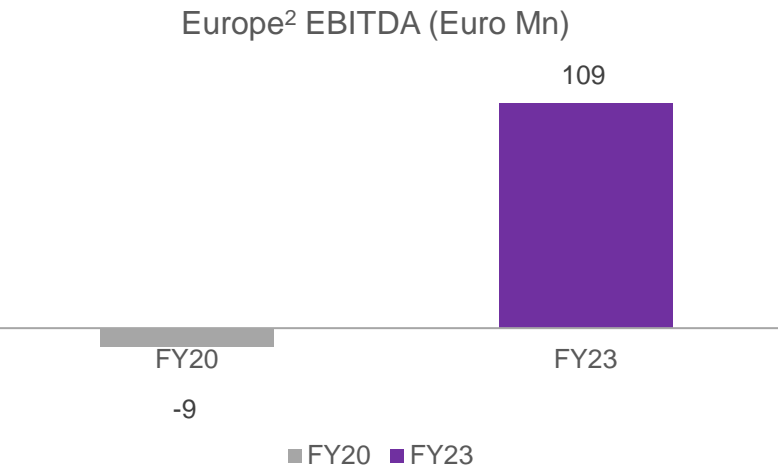
While attaining best in class profitability



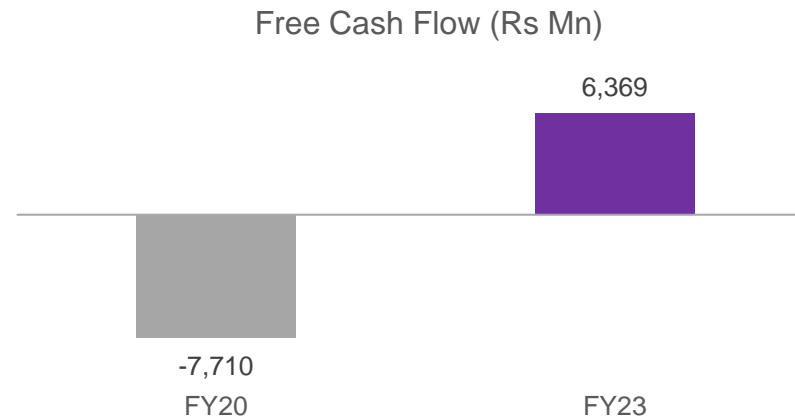
Robust revenue growth in Europe (Euro Mn)²



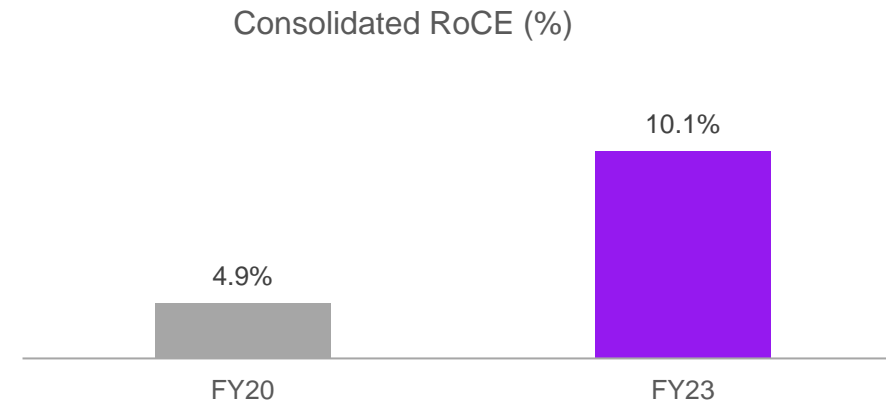
Strong recovery in Europe² operating performance



Focus on free cash flow generation



Significant improvement in return ratio



Company Overview



Leading global tyre manufacturer

- Incorporated in 1972
- A full range player
- Long standing client relationship with many of the marquee OEMs across the globe
- Listed on both NSE and BSE with an approximate current Market Capitalisation of ~INR 26 Bn



Strong brands with leading market position

- India: Leading player in Truck & Bus and Passenger vehicles
- Europe: Premium market position in fast-growing passenger car segments



Experienced leadership team & board, and backed by long-term PE investor

- Experienced leadership team
- Strong Board: 8 independent directors & 7 Non-independent Directors
- Backed by global marquee private equity – Warburg Pincus



Deep distribution network built over time

- ~ 7,250 Dealers (India)
- ~ 6,500 Dealers (Europe)



State of art production facilities and continued focus on R&D

- 7 Manufacturing Plants (India: 5, Europe: 2)
- 2 R&D centres (India/Europe) and 1 testing centre (Europe)
- Digital Innovation Hub in UK and India. The Hub will use Artificial Intelligence and Machine Learning technologies to solve complex manufacturing problems
- Podium positions garnered in European and North American PCLT test results

Key Performance Indicators

Revenue (INR Mn)

FY19	175,488
FY20	163,502
FY21	173,970
FY22	209,476
FY23	245,681

EBITDA (INR Mn) & EBITDA Margins (%)

FY19	19,586 (11%)
FY20	19,387 (12%)
FY21	27,975 (16%)
FY22	25,741 (12%)
FY23	33,137 (13%)

Capital Expenditure Outflow (INR Mn)

FY19	22,932
FY20	28,361
FY21	11,902
FY22	18,164
FY23	7,604

Strong Management Team with Deep Experience



Onkar Kanwar

Chairman



Neeraj Kanwar

Vice Chairman &
Managing Director



Benoit Rivallant

European Operations

Total Experience: 35 years
Years with Apollo Tyres: 9



Daniele Lorenzetti

Research & Technology

Total Experience: 28 years
Years with Apollo Tyres: 7



Gaurav Kumar

Finance & Legal

Total Experience: 30 years
Years with Apollo Tyres: 19



Hizmy Hassen

Digitalisation & IT

Total Experience: 27 years
Years with Apollo Tyres: 3



K Prabhakar

Projects

Total Experience: 42 years
Years with Apollo Tyres: 34



Satish Sharma

Asia Pacific, Middle East &
Africa Operations

Total Experience: 34 years
Years with Apollo Tyres: 26



Sunam Sarkar

Sustainability, Human
Resources, Communications,
Procurement and Supply Chain

Total Experience: 34 years
Years with Apollo Tyres: 24

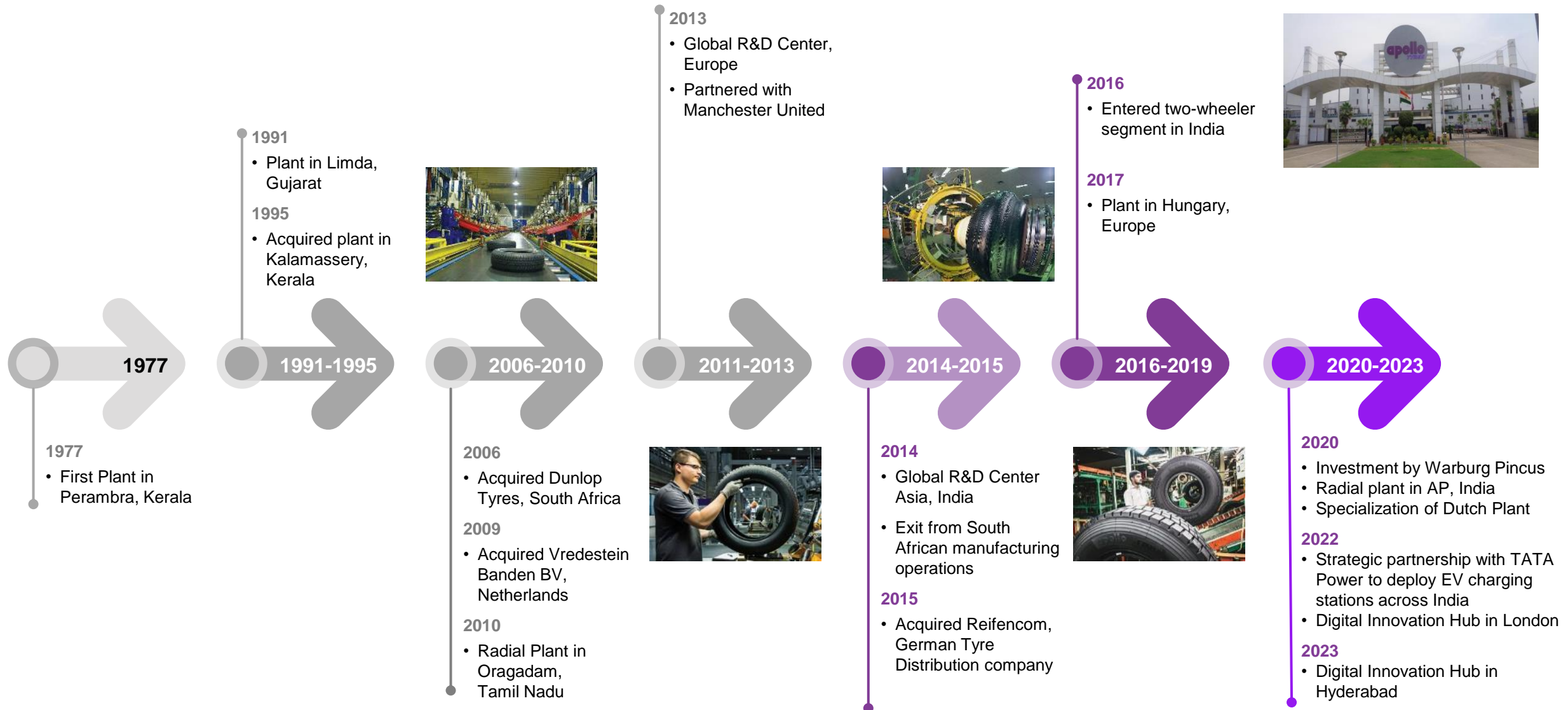


Yoichi Sato

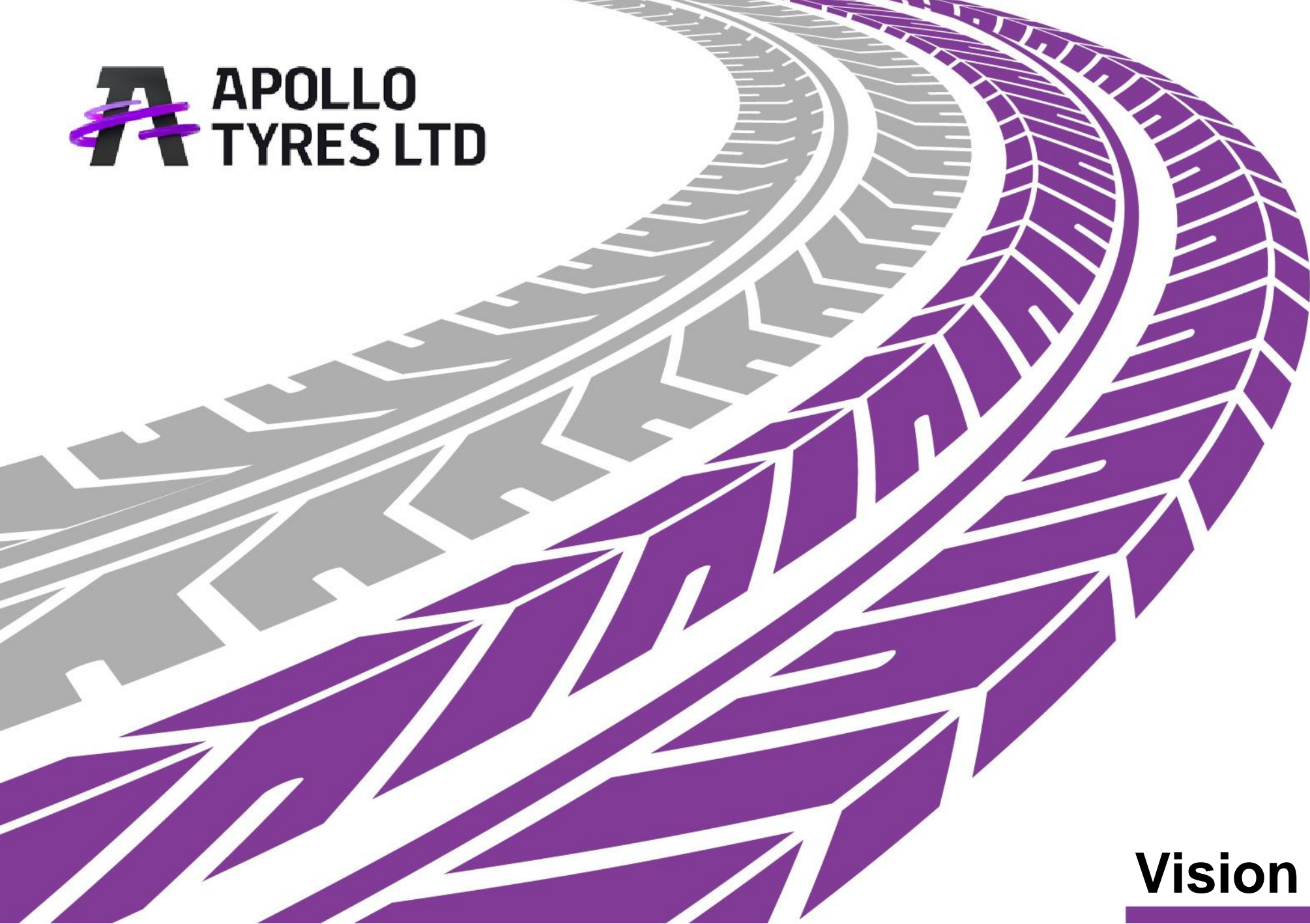
Quality, Health, Safety
& Environment

Total Experience: 26 years
Years with Apollo Tyres: 4

Key Milestones



Apollo Tyre's growth has been driven by a well thought out strategic and operational initiatives



Vision FY2026

Vision**DRIVING PROGRESS, TOGETHER****Purpose****ENABLING EXCELLENCE****Value****FOLLOWING
OUR PASSION****ONE
FAMILY****TAKING
RESPONSIBILITY**

Performance Goals (FY 26)

Revenue Goal \$5Bn

EBITDA > 15%

ROCE = 12% to 15%

Net Debt: EBITDA < 2

FY23 Vs Vision 2026

Particulars	FY 2023 Actual	FY 2026 Vision
Revenue (USD Bn)	3.1 ¹	5.0
EBITDA (%)	13.5%	>15%
ROCE (%)	10.1%	12% - 15%
Net Debt to EBITDA (x)	1.4x	<2x

1. Adjusted for movement in forex, the like for like FY23 revenue would be approximately USD 3.3 Bn

Enabling Excellence – 5 Key Enablers



Digitalisation

Business Growth, Efficiency Improvements and Risk Mitigation

Areas of focus under Vision 2026

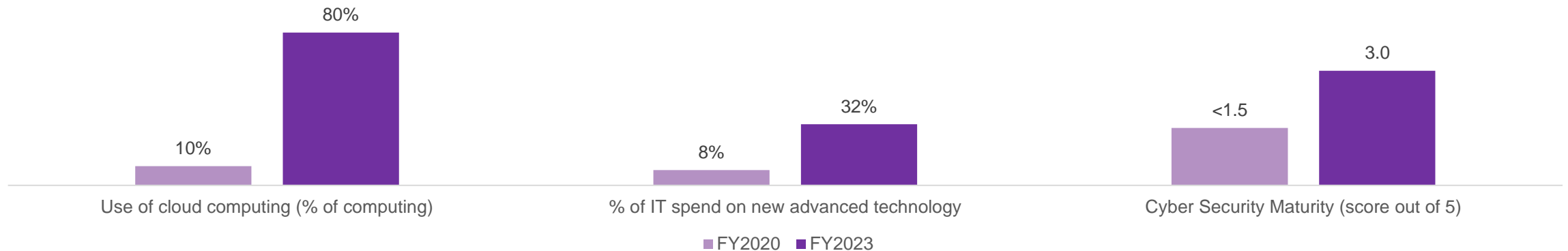
- Use latest digital technologies to create world class customer experience and new business models
- Create a best in class end to end integrated and agile global / regional supply chain
- Use Industry 4.0 technology to drive efficiency gains in manufacturing

Key achievements in FY23

- Increased customer digitisation and launch of new business model in APMEA
- Data and computing is predominantly in the Cloud; Industry 4.0 launched
- Supply chain digitisation in EU, model for global roll out. Advancement in other core processes

FY24 target

- New advanced B2B portal and increased digitisation on all customer interactions
- Industry 4.0 to drive efficiency gains in manufacturing
- Creating a connected global / regional supply chain



Technology & Innovation

Drive Product Leadership and Enhance Technology Readiness

Areas of focus under Vision 2026

- Tyre technology for EV
- Green tyre technology
- Smart development - Virtual development, advanced testing, advanced materials

Key achievements in FY23

- New product development and launches
- OEM Journey: Premium approvals / EV Approvals
- Continued podium positions and OEM endorsements

FY24 target

- Focus on sustainability for all business categories
- Focus on OEM's "EV dedicated" platforms
- Add-on Tyre technologies: Tyre sensors; Noise cancellation



People

Attract, Engage and Retain Best Talent

Areas of focus under Vision 2026

- Digitize
- Engage & Recognize
- Empower & Energize
- Diversity & Inclusion

Key achievements in FY23

- Employee engagement: 90% global participation in Apollo Voice
- Professional growth and career advancement: Global learning calendar, Apollo laureate program and laureate future leaders program
- Succession planning: Concluded evaluation of 9-box grid for 1,000 plus employees

FY24 target

- Retain top talent: Invest in L&D, career enrichment, career path enhancement
- Employee experience & Engagement: Employee listening & action, enriched employee HR digital experience
- Balancing cost: Lower hiring cost and invest more in retaining and growing internal talent



Brand – Europe

Driving Premiumisation

Areas of focus under Vision 2026

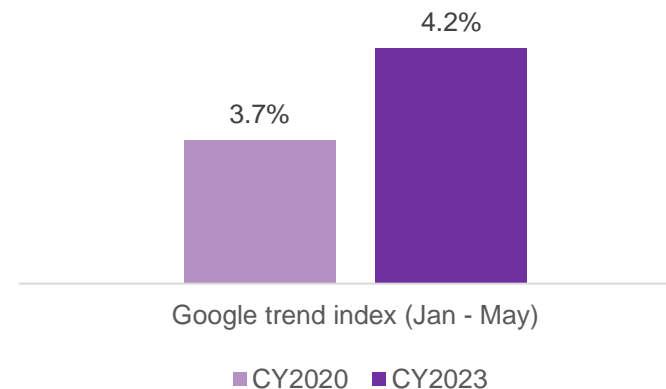
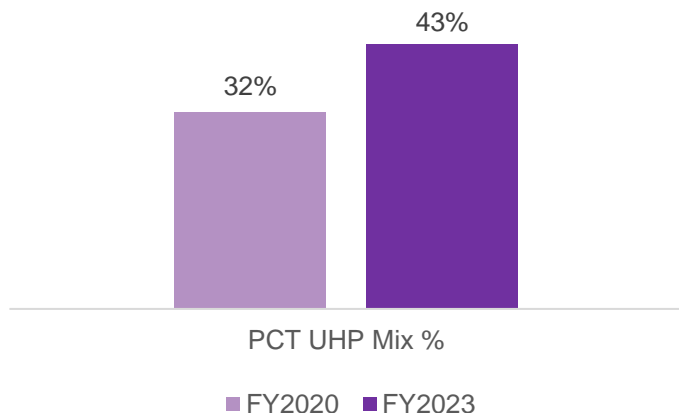
- Product Mix enrichment in each product category / brand
- Volume growth in targeted categories
- Price position vs Premium brands

Key achievements in FY23

- Market share gain particularly on All Season and UUHP tires as well as Agriculture tires
- Product mix enrichment: 170bps improvement in PCLT sales mix (UHP mix)
- Price position improvement: improved by 2 to 4pts average vs Top Tier 1 benchmark

FY24 target

- Despite challenging environment, target to achieve higher volume growth as compared to Industry
- Continue product Mix enrichment: Targeting further improvement in UHP proportion



Brand - India

Brand Leadership in India

Areas of focus under Vision 2026

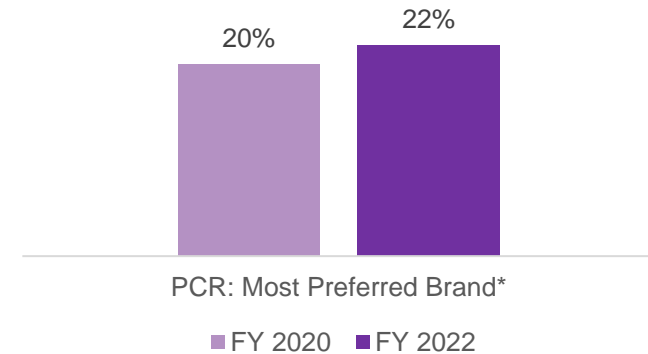
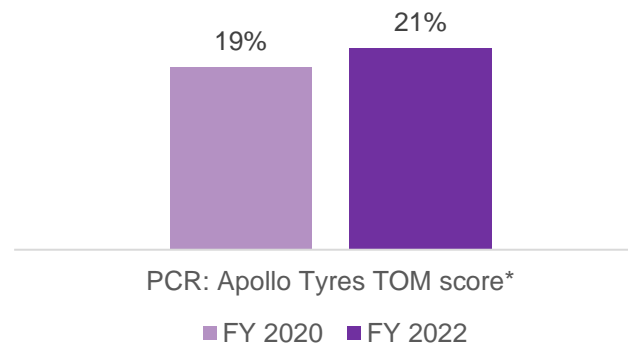
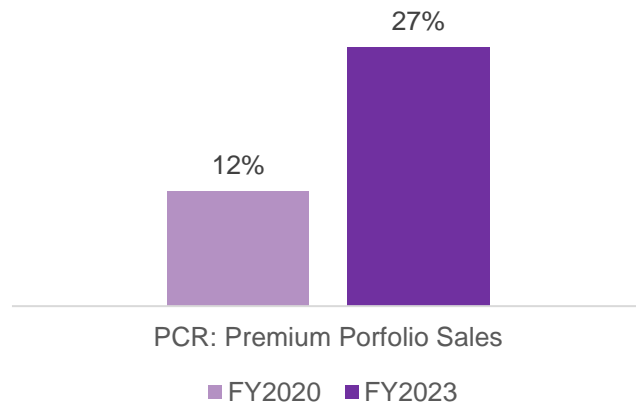
- Build premium Brand Experience across various category range
- Strengthen brand equity
- Build Omnichannel connected brand journey with enhanced Retail Experience

Key achievements in FY23

- Maintained volume leadership in PCR replacement segment for 3rd year in a row
- Launched more than 7 new products in CV segment
- Continued focus on Rural segment: 14% growth in business; 50+ distributors added

FY24 target

- Drive volumes while holding price premium positioning, Build VR brand
- Strengthen and build Apollo as Consumer Brand
- Leverage Sport Brand Assets across our Product Communications



Sustainability

Ensure Long Term Sustainability and target to be Carbon Neutral

Areas of focus under Vision 2026

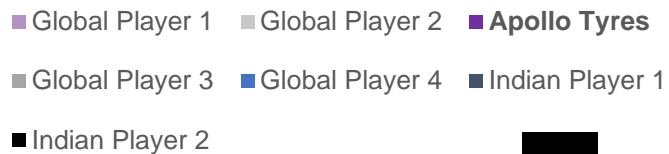
- Decarbonisation roadmap with 2030 commitments
- Raw material commitment of reaching 40% sustainable material by 2030
- Social projects in communities across Europe and India to reach target of 15 million beneficiaries.

Key achievements in FY23

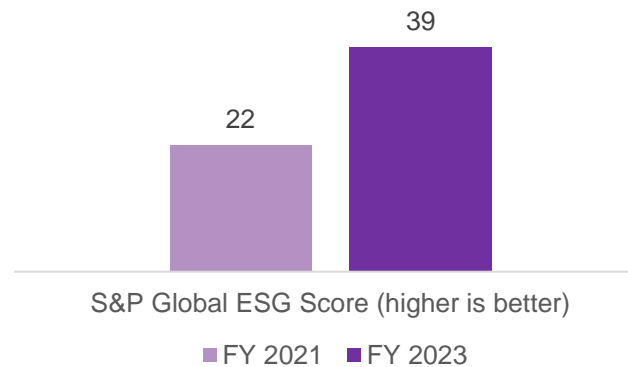
- Improvement in Sustainability Scores – Sustainalytics and Carbon Disclosure Project
- Showcased tyre with 75% sustainable raw material as a part of a pilot project (lab stage)
- Achieved reduction in CO2 emissions (Scope 1 & Scope 2) of ~ 13% in comparison to FY22

FY24 target

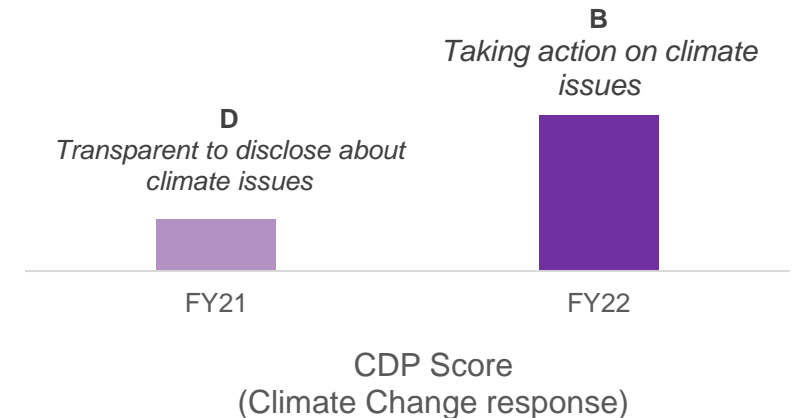
- Conduct a Materiality Assessment to align with the ongoing focus areas
- Work on internal Carbon Pricing project to support the climate strategy
- Work on Scope 3 commitments and project.



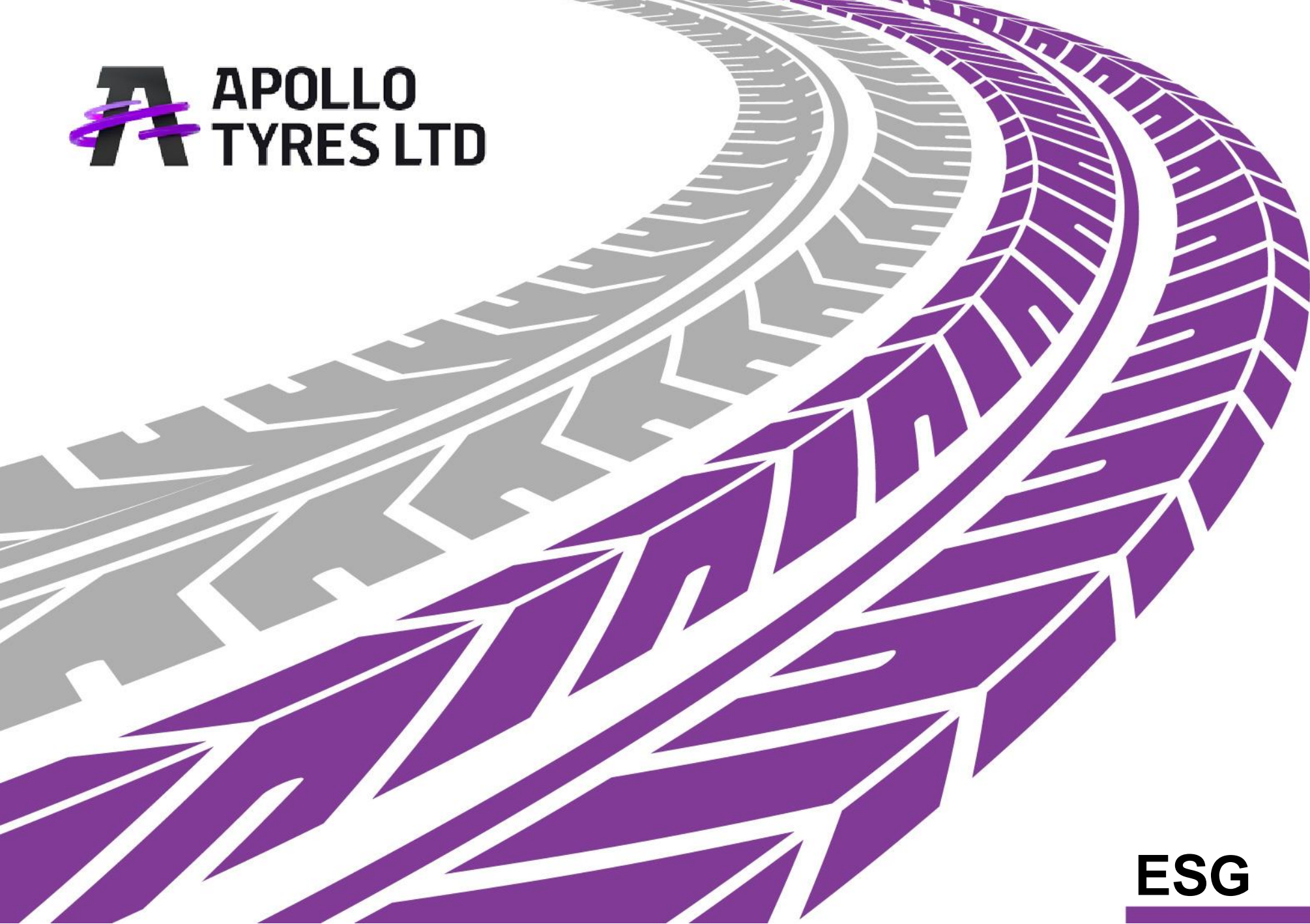
Sustainalytics Rating (lower is better)



S&P Global ESG Score (higher is better)



CDP Score (Climate Change response)



Environment, Social & Governance (ESG)

Sustainability Governance

- Sustainability Steering Group for decision making process
- Sustainability Model as per ISO 26000

Circular Economy

- Endeavour to set processes for environmentally friendly disposal of ELT- use of re-purposed tyres for sports pitches

People

- Invest in Human Capital– training and development
- Enhance Diversity & Inclusion
- Adoption of ISO 26000 Core Subjects of Labour Practices and Human Rights



Climate Change

- Commitment to Carbon Neutrality by 2050- Drawing de-carbonization roadmap for FY'26
- Water efficiency- Roadmap to improve water use efficiency
- Waste conscious operations

Value Chain – Supply Chain

- Use of sustainable material
- Practices influencing adherence to ESG practices in Value Chain

Communities – CSR

Target to reach over 15 million beneficiaries by FY'26 through our core programmes

Environment



Climate Change Strategy

- To be Carbon neutral by 2050
- Improve Scope 1 and 2 emission intensity by 25% respectively against baseline year of 2020
- To improve water withdrawal intensity by 25% against baseline year 2019
- Increase in renewable power in total power share to 25% by 2026
- Increase usage of sustainable raw material to 40% by 2030
- A prototype tyre developed with 75% sustainable materials

**Independently
assured Water
footprint***



* Water assurance started from FY22



Nature Based Solutions - Biodiversity Conservation (A global theme for Apollo)

India

- Mangrove Conservation Project in Kannur, Kerala
- Afforestation programme supporting 350,000 trees in Tamil Nadu and 10,000 tree plantation at Gujarat region

Europe

- Stadbeek project in Enschede- Netherlands and Conservation of Bukk National Park, Gyöngyöshalász, Hungary

**Independently
assured Carbon
Footprint**
*(Includes Scope 1, 2
and 3)*



Social



CUSTOMER

- Healthcare Programme for Trucking Community (Customer) at 32 locations in 19 Indian states
- Total 11 of Commercial Vehicle (CV) zones have been equipped with electric vehicle charging stations in collaboration with Tata Power



PEOPLE

- For the 10th year in a row, Apollo Tyres has been certified as a #GreatPlaceToWork by the Great Place to Work® Institute (India)
- Singapore and UK offices are certified as top employer by Top Employers Institute (global authority on recognising excellence in people's practices)
- To improve D&I to 12% globally



COMMUNITIES

India

- Around 10 million beneficiaries outreach till FY'23
- Livelihood programme for Rural women - Over 17,000 women are outreach

Europe

- Blood donation camps in Hungary
- Campaigns to support treatment of sick children, who can not afford treatment

Governance

A Strong Board

- More than 90% attendance in board meetings held in FY23
- Eminent people with strong Industry experience across domains
- Eight Independent directors on board, including two independent women directors
- Strong governance model in place with representation from industry leaders and independent board members in various committees
 - Audit Committee
 - Stakeholders Relationship Committee
 - Risk Management Committee
 - Nomination and Remuneration Committee
 - CSR Committee
 - Business Responsibility and Sustainability Committee

Eminent Board of Directors with Wide Ranging Expertise



Onkar Kanwar

Chairman



Neeraj Kanwar

Vice Chairman & Managing Director



Akshay Chudasama

Independent Director

Regional Managing Partner
Shardul Amarchand Mangaldas & Co



Gen. Bikram Singh (Retd.)

Independent Director

Former Chief of Indian Army



Francesco Crispino

Independent Director

Co-Founder
Greater Pacific Capital



Francesco Gori

Non Independent Director

Former CEO, Pirelli Tyre



Dr. Jaimini Bhagwati

Independent Director

Former India's High Commissioner to UK and Ambassador to the European Union



Lakshmi Puri

Independent Director

Former Ambassador to Hungary & Assistant Secretary General (UN)



Pallavi Shroff

Independent Director

Regional Managing Partner
Shardul Amarchand Mangaldas & Co



Robert Steinmetz

Non Independent Director

Former Chief of International Business, Continental AG



Satish Sharma

Non Independent Director

President (APMEA) & Whole-Time Director



Sunam Sarkar

Non Independent Director

President & Chief Business Officer



Vikram S Mehta

Independent Director

Former Chairman
Shell Group of Companies



Vishal Mahadevia

Non Independent Director

MD, Head of
Warburg Pincus India



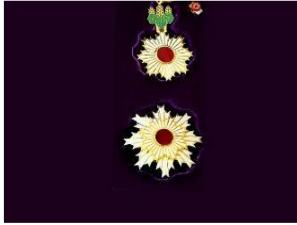
Vinod Rai

Independent Director

Former Comptroller and Auditor General of India

Awards & Recognitions

Leadership



Onkar S Kanwar awarded Order of the Rising Sun, Gold and Silver Star by Japanese Govt.



Onkar S Kanwar awarded with the Officers Cross (Civilian Division) of the 'Order of Merit' of Hungary

Compliance



Compliance Team Award 2022

Marketing / PR



Cannes: Silver Lion for 'Adopt a Pothole'



Cannes: Golden Dolphin for Marketing Communication

Human Resources



India's Best Companies to Work for

CSR



ICSI CSR Excellence Awards

Quality / Manufacturing



Deming Prize – Apollo Tyres Chennai Plant



EY Entrepreneur of the Year - Manufacturing

Risk Management

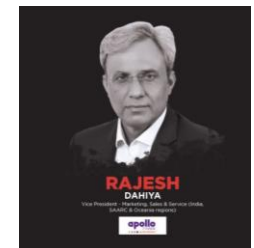


Masters of Risk at the India Risk Management Awards by CNBC-TV18

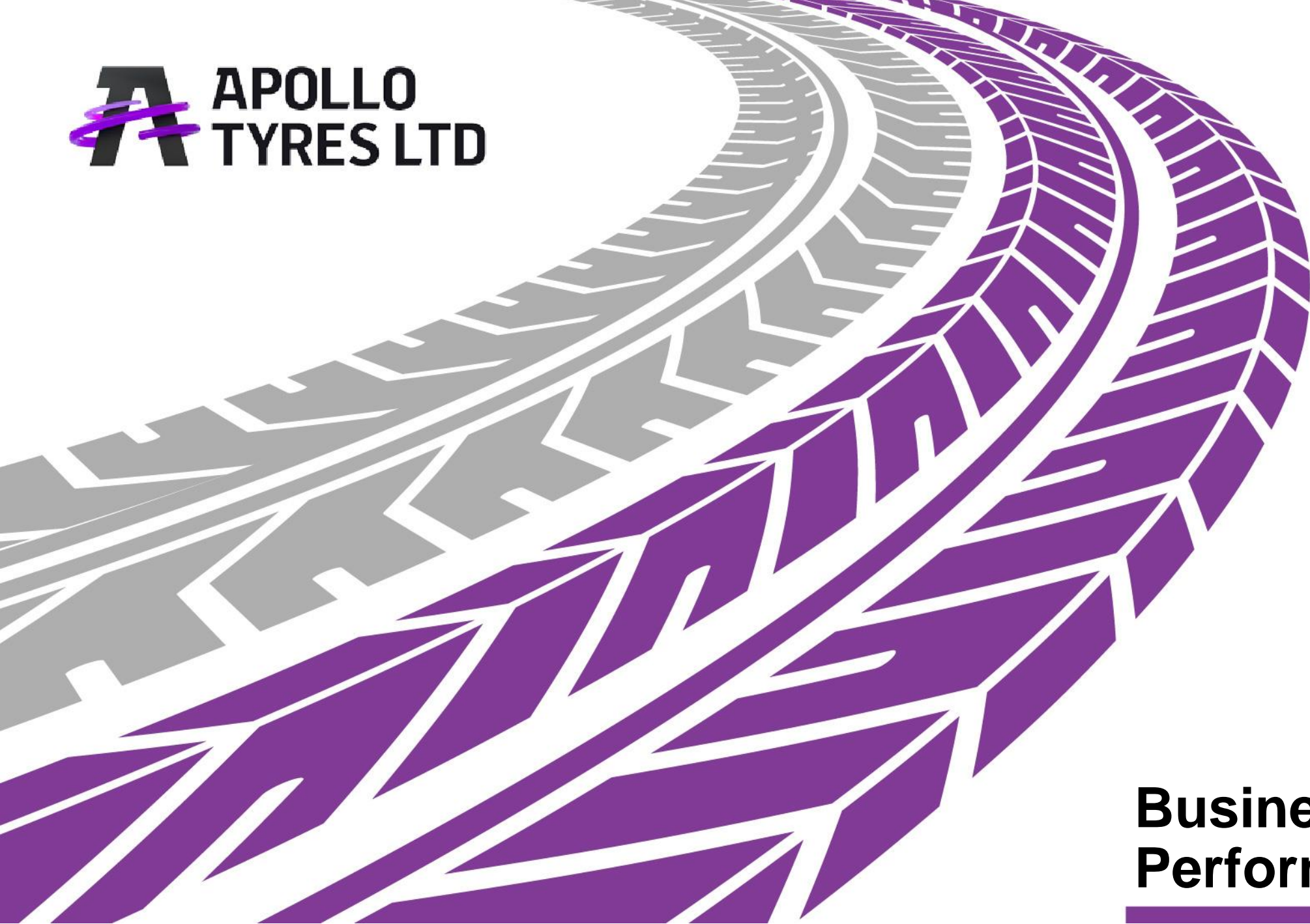
Innovative and Winning Products



Golden Peacock Award for Innovative Product/Service

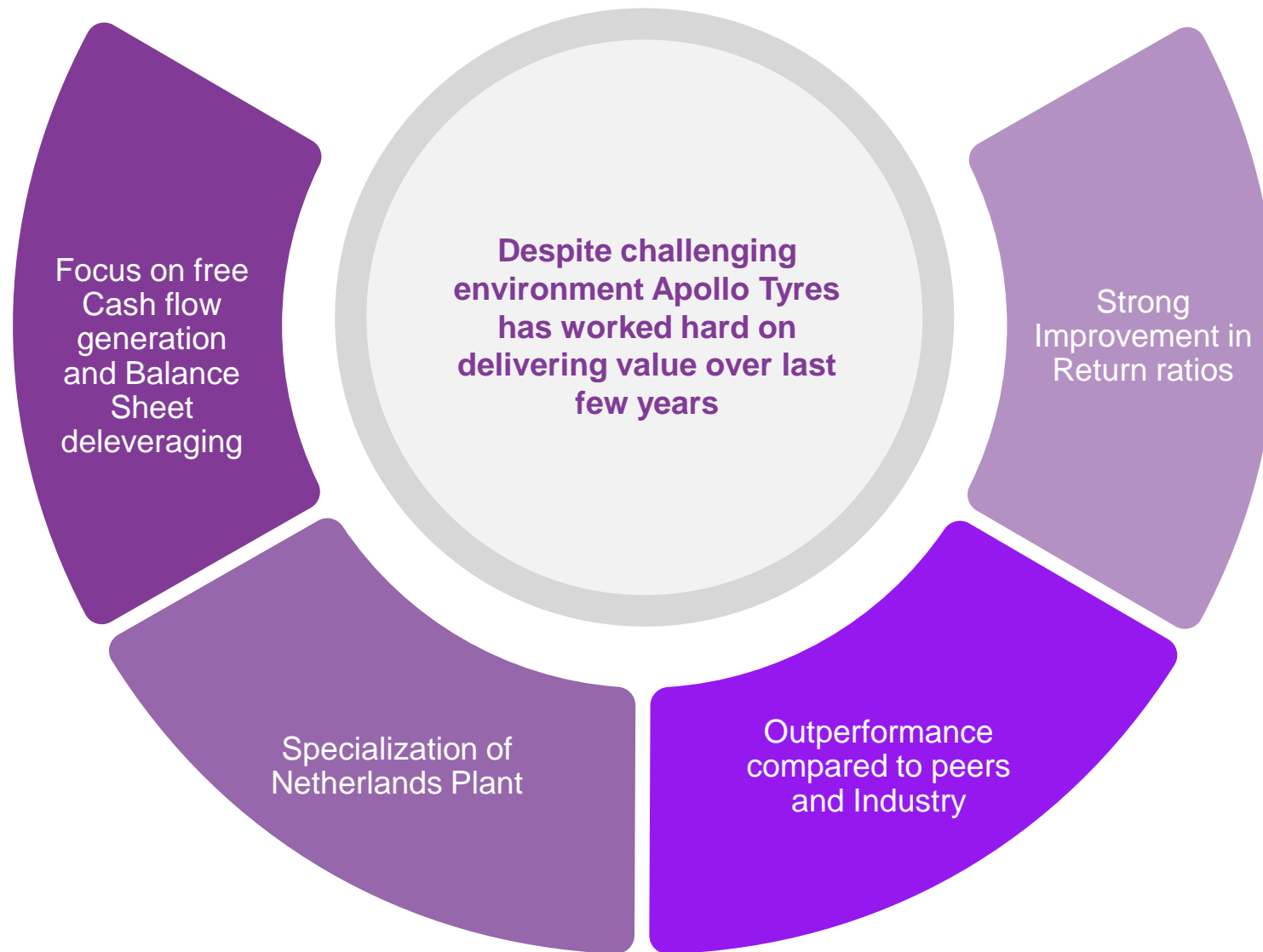


CMO Sustainability award (marketing strategy) at the Pitch CMO Awards



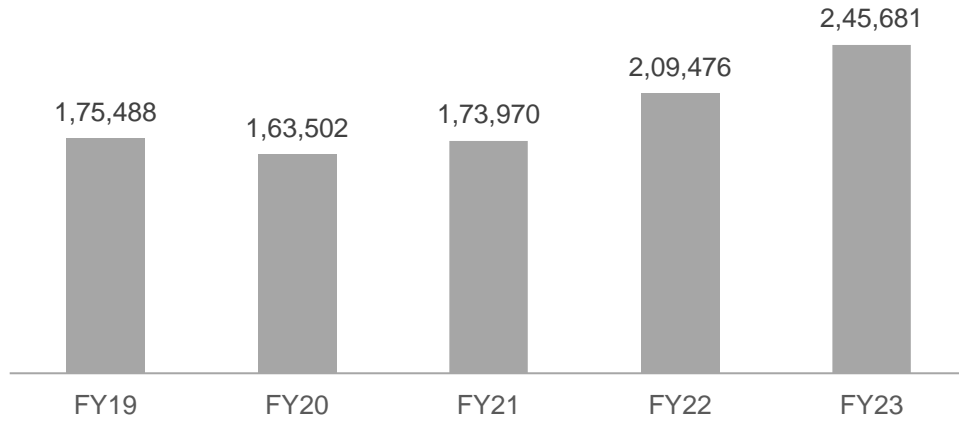
**Business
Performance**

Robust execution in last few years

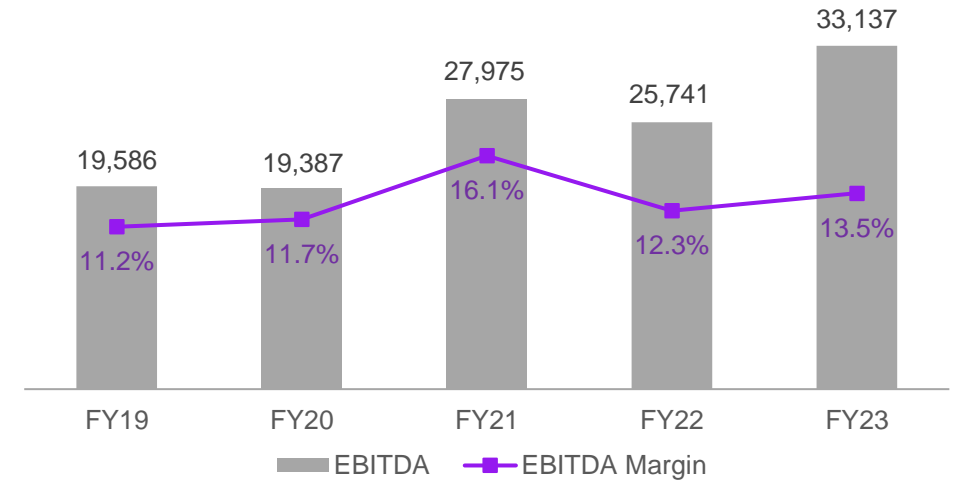


Historical Consolidated Financial Performance

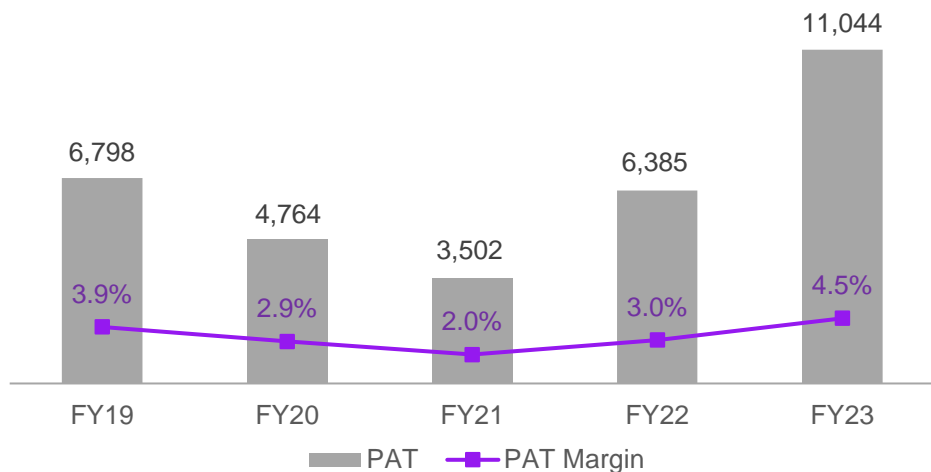
Revenue (INR Mn)



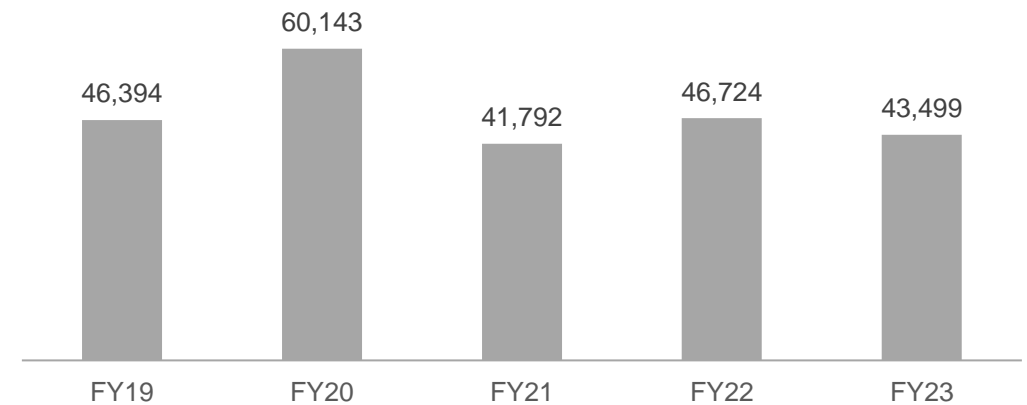
EBITDA (INR Mn) and EBITDA Margin (%)



PAT (INR Mn) & PAT Margin (%)

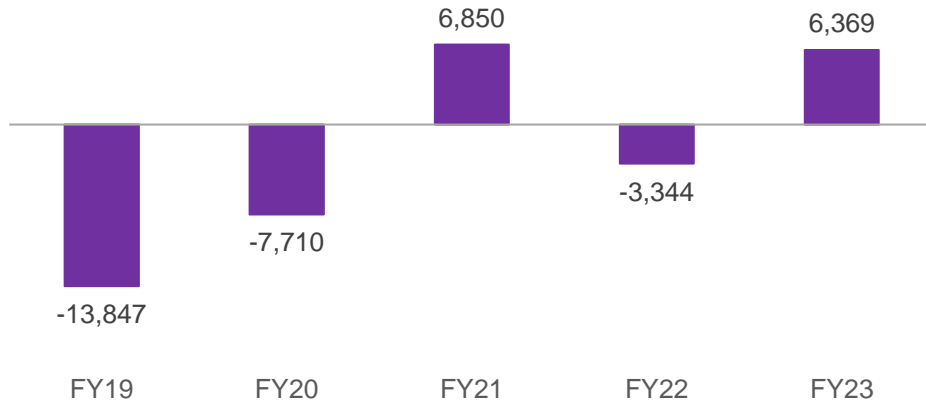


Net Debt (INR Mn)

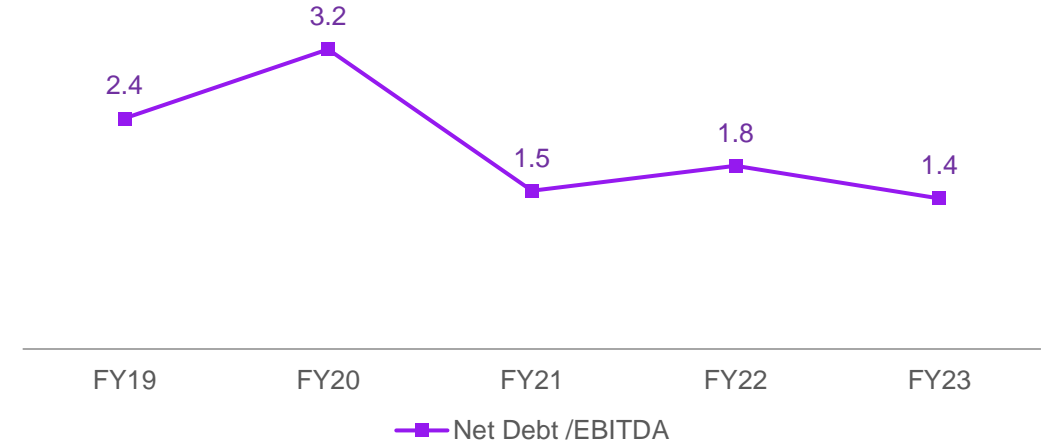


Historical Consolidated Financial Performance

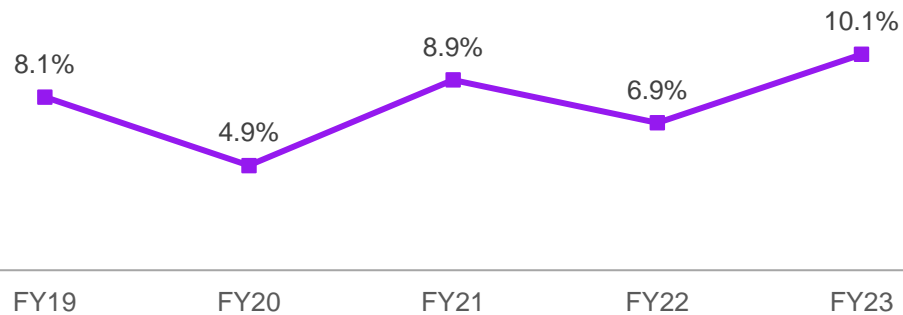
Free Cash Flow (INR Mn)



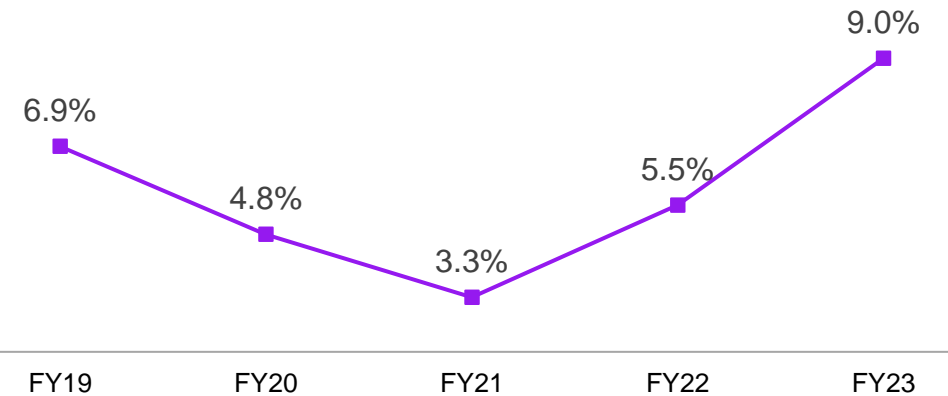
Leverage Ratios (x)

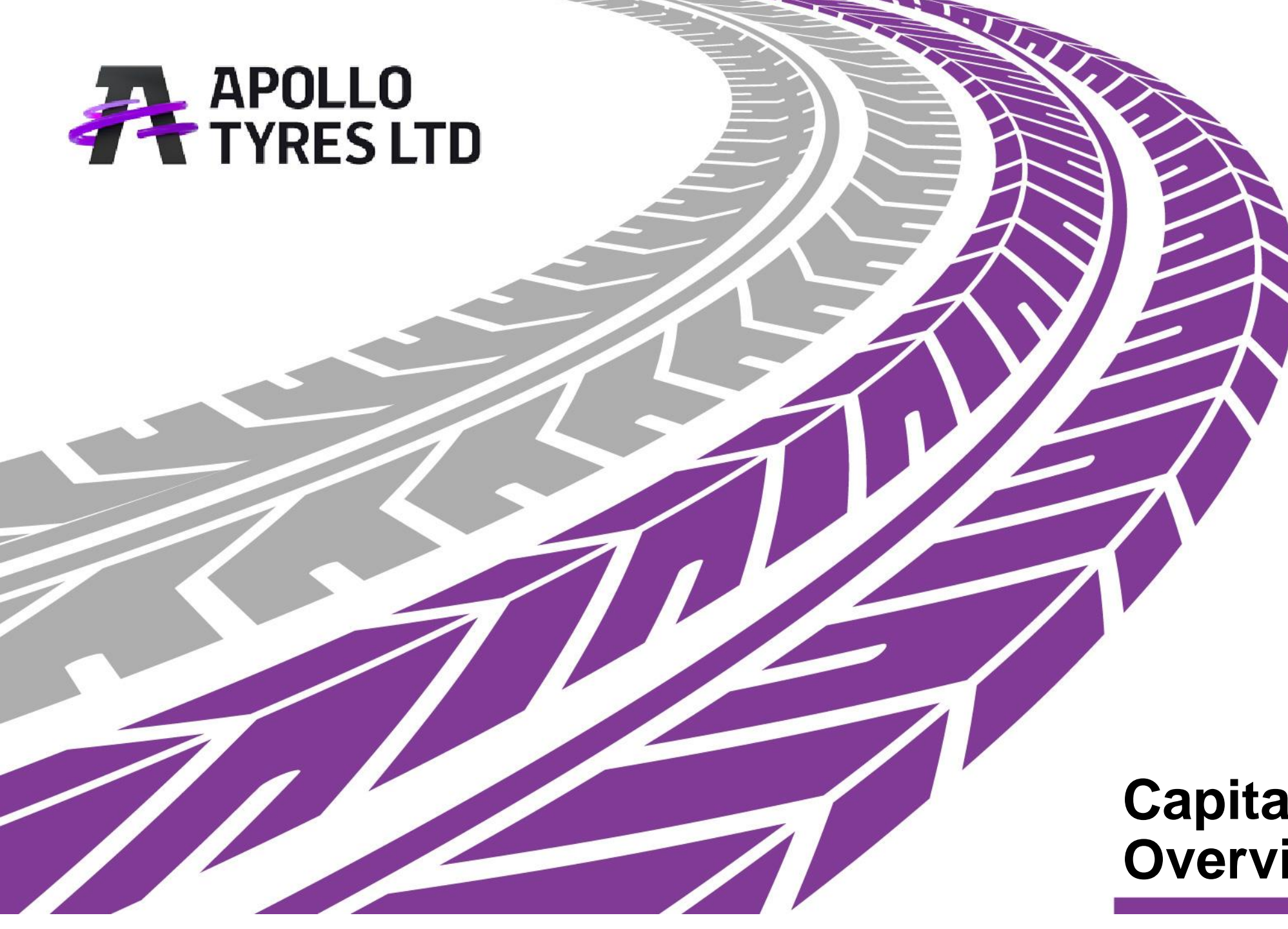


ROCE (%)



ROE (%)





Capital Markets Overview

Coverage Details

Sell Side Coverage Details (Indicative Lis)

Firm Name	Analyst Name	Rating	Target Price
Morgan Stanley	Binay Singh	Overweight	400
JP Morgan	Amyr Pirani	Overweight	445
Citi	Arvind Sharma	Buy	445
Nomura	Siddhartha Bera	Neutral	386
IIFL Securities	Joseph George	Add	410
Equirus Securities	Ashutosh Tiwari	Buy	477
Kotak Securities	Rishi Vora	Sell	310
Axis Capital	Nishit Jalan	Buy	435
Elara Securities	Jay Kale	Accumulate	425
JM Financial	Ronak Mehta	Buy	415
Investec	Aditya Jhawar	Buy	460
HDFC Securities	Aniket Mhatre	Add	394
Motilal Oswal Securities	Jinesh Gandhi	Buy	430
B&K	Annamalai Jayaraj	Buy	444
Avendus Spark	Mukesh Saraf	Add	400

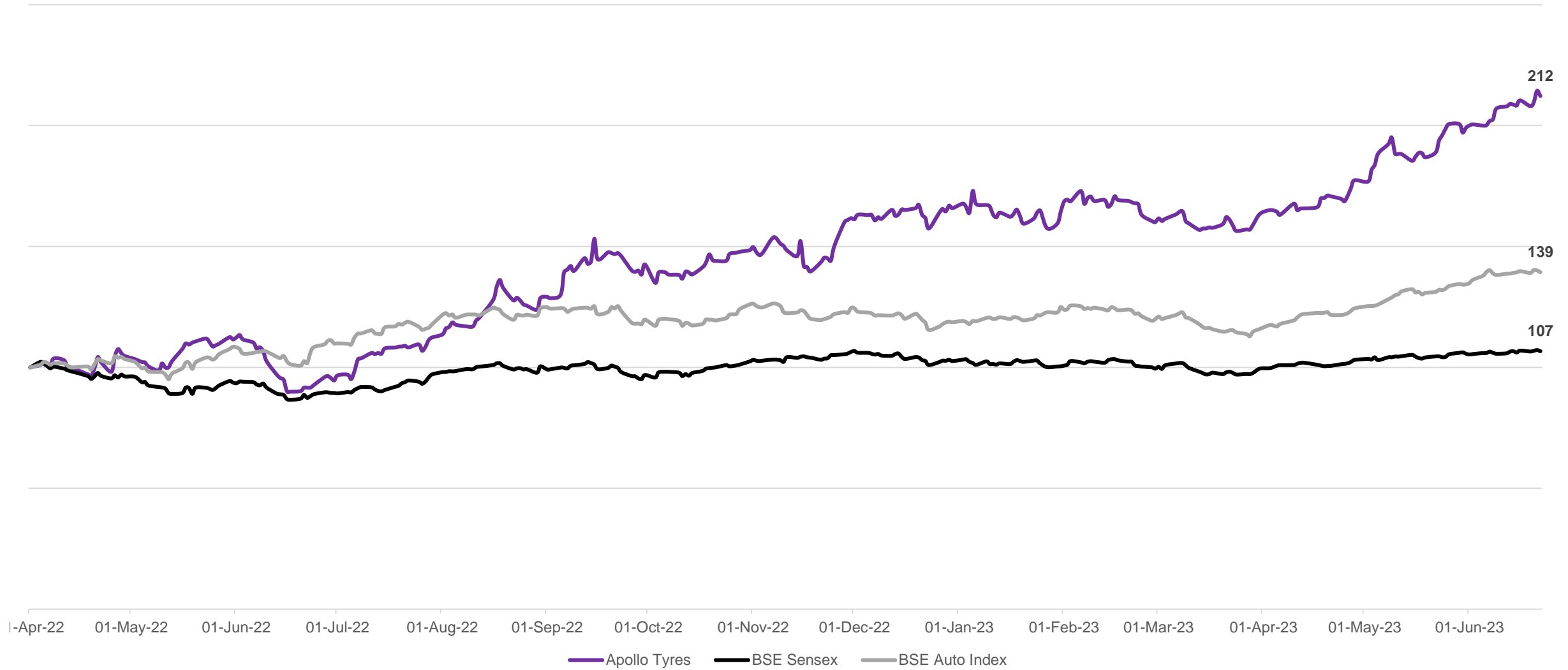
Source: Bloomberg; As on 23rd June 2023

Shareholder Details

Top Marquee Shareholders as on 16-06-2023

Shareholder	% Shareholding
Warburg Pincus Affiliates	18.0%
Housing Development Finance Corp. Ltd	8.6%
Kotak Mahindra Bank Ltd	4.0%
The Vanguard Group, Inc	2.3%
Dimensional Holdings, Inc	1.6%
BlackRock, Inc.	1.6%
Government Of Singapore	1.1%
Franklin Templeton Asset Management	0.9%
Norges Bank Investment Management	0.8%
State Street Corp.	0.7%
RBC Global Asset Management (UK) Ltd.	0.7%

Stock Price Performance (since 1st April 2022)



Source: BSE

APOLLO TYRES LTD

Apollo Tyres – A long term story



1

Large Indian Market with Strong Tailwinds and Favorable Dynamics

2

Portfolio of Leading Brands with Deep Distribution Network within India

3

Focused on Fast Growing and Profitable segments in Europe and North America with a Cost Competitive Footprint

4

Significant Progress on Sustainability and ESG

5

Strong Focus on R&D and Digitalization (leveraging technologies like AI/ML/Data sciences/ Industry 4.0)

6

Experienced Leadership Team & Board, and backed by a Marquee, Long-Term Investor

7

Consistent Execution Track Record in an Uncertain Environment



For further details please feel free to get in touch with the IR team

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Head – IR & Budgeting
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Thank you





Apollo Tyres Ltd – AP plant



Content

- AP Plant – Glance
- Uniqueness of AP Plant
- Tyre Manufacturing process & technological advancements
- Certification Status
- Sustainability
- Corporate Social Responsibility
- Employee Engagement

AP Plant Overview



257 Acre (104 Hectare) Greenfield campus located in the Chinnapanduru village, Andhra Pradesh (7 Kms from Sricity, AP)

Capacity

- PCR: 15,000 Tyres/day
- TBR: 3,000 Tyres /day

AP Plant Vision

Supply of world class radial tyres from a continually learning, improving, conscious factory through an ambience of mutual respect and ownership.



Vision of AP Plant

“Supply of world class radial tyres from a continually learning, improving, conscious factory through an ambience of mutual respect and ownership”

AP Plant Uniqueness



Lean Layout

Technological advancements

Safety & Quality Culture

Advanced Automations

Manufacturing Execution System (MES)

Smart Factory - Digitization

AP Plant Uniqueness – Lean layout



- Zero Back flow of material
- Dedicated PCR & TBR Product line
- Centre Spine Concept
- Vertical Stacking in RMS, Mixing, Building & FGS
- Planned for Future expansion
- Distributed Cafeteria

Benefits of Centre Spine concept



Areas located centrally between PCR & TBR product line which has common facilities such as Mould shop, Utility areas, Test centre etc., which serves for PCR & TBR.

- Reduction in Material handling cost & material flow distance
- Improvement in Machine utilization which reduces the production lead time
- Reduction in the Energy consumption

Unique Equipment and Process Features

01 **Quadraplex & Quintaplex Extruder**
Sandwiching of 4 layered tread compounds through Pressure head extrusion

02 **Tandem Mixer**
Improved Silinazation & dispersion of silica mixing (Reactive) without affecting the product performance

03 **Online Profilometer**
Real-time measurement system for monitoring key profile dimensions in complex tread and sidewall extrusions.

04 **Hexa Bead Construction**
Wrapping a single strand of rubber coated bead wire into a bundle of a desired cross sectional shape

05 **No touch GT Concept**

- Auto carcass loader
- 100% Green tyre online weighment
- Auto Bar Code application

06 **Auto Gauge Control**
Auto adjustment of the Nip gap to maintain the Gauge of the Calendared material

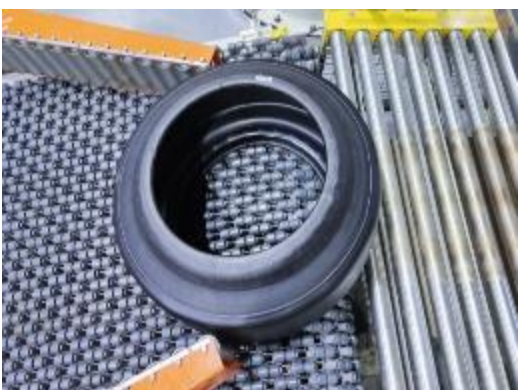
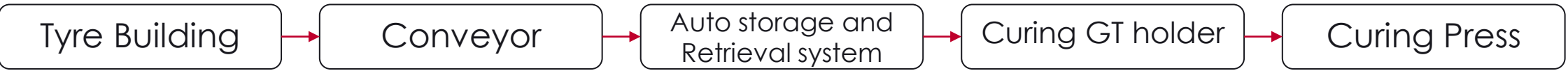
No Touch Green tyre concept



NO Touch Green tyre Concept

- The process of transferring Green Tyre (GT) from Tyre Building to Curing press is fully automatic.

GT Transfer flow:



Transferring of Green tyre after building from TBM to Conveyor



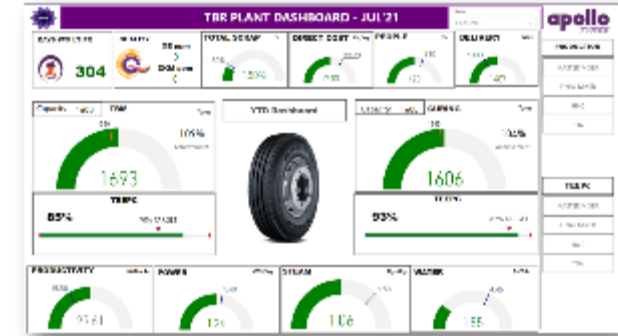
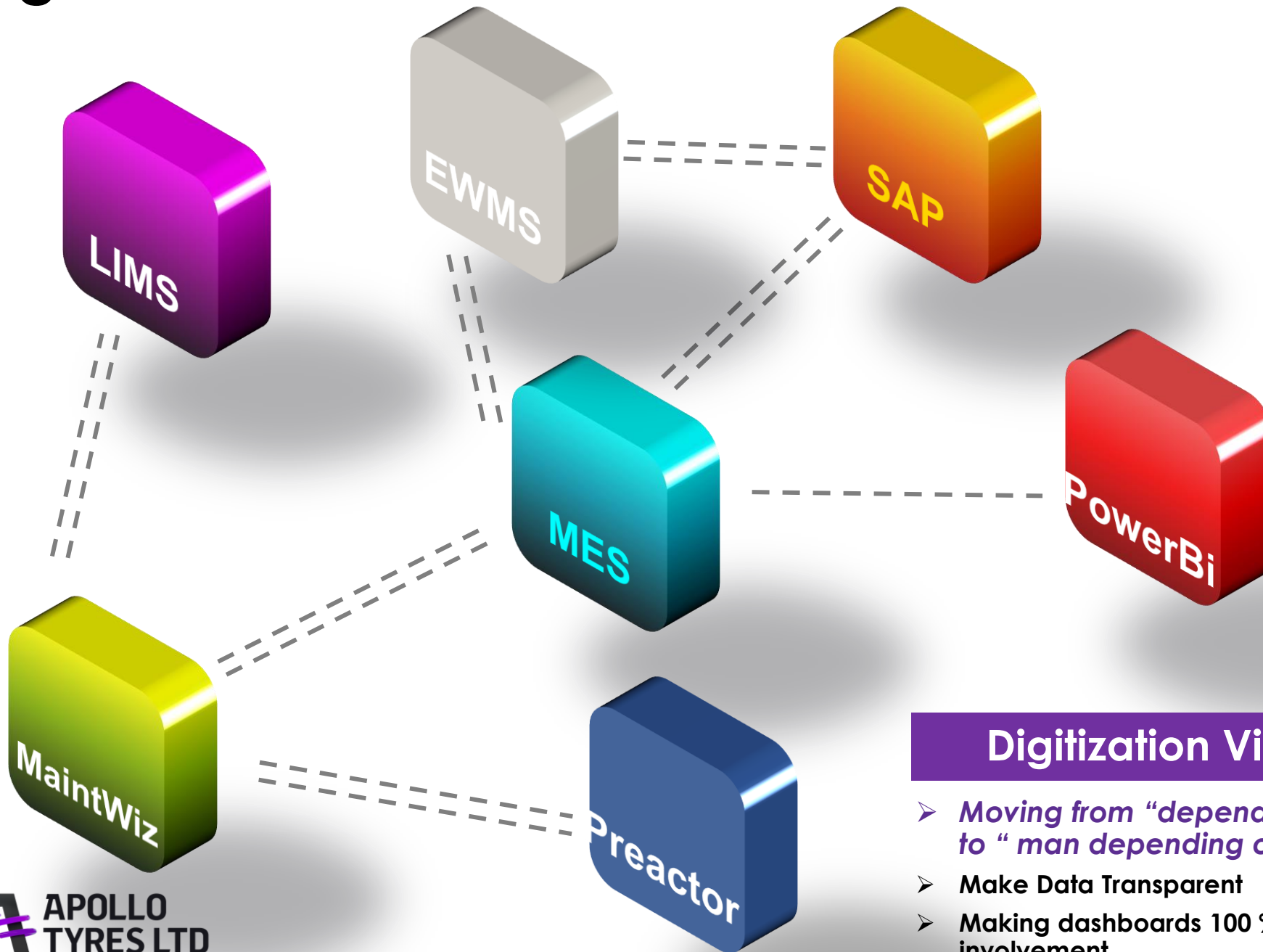
Transferring of Green Tyre from Conveyor to ASRS



Transferring of Green Tyre from ASRS to VCL Arm



Transferring of Green Tyre from VCL Arm to Curing press



- Daily Performance monitoring dashboard
- Live dashboard
- DWM dashboards
- 73% Data captured directly from the system (Online)

Digitization Vision

- *Moving from “depending on man to make data” to “man depending on data to make decisions”*
- **Make Data Transparent**
- **Making dashboards 100 % digitized to eliminate man involvement**



- Real time inventory monitoring
- Size wise stacking
- FIFO adherence
- Auto palletising

AP Plant Awards & Certification



Best Organization for Promoting QC Circles

Par Excellence in NCQC

ISO 9001:2015

IATF 16949:2016

ISO 14001:2015

ISO 45001:2018



Chairmans Safety Award 2022

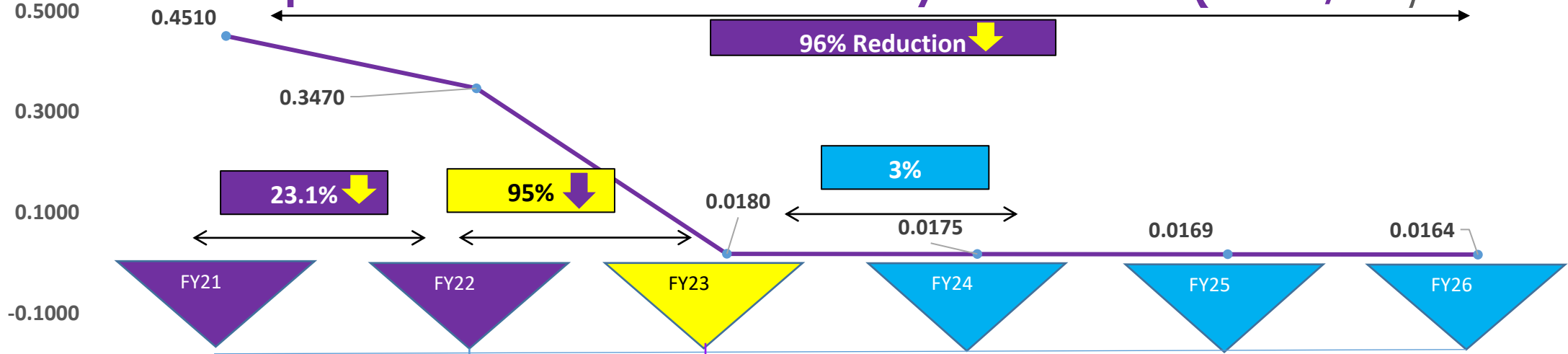
Winner of Global ATQM Competition FY23



Sustainability – CO2 Emission Intensity Reduction



Scope#1 - CO2 Emission Intensity Reduction (tCO2/MT)



Steam traps losses reduced by replacing with bucket type in place thermodynamic type. ●

- No stand by operation of FO/LDC boiler's since May'22. ●
- Coal Fired Boiler with 100% Biomass since May'22. ●
- Condensate recovery 70% to 85% (80% achieved) ●

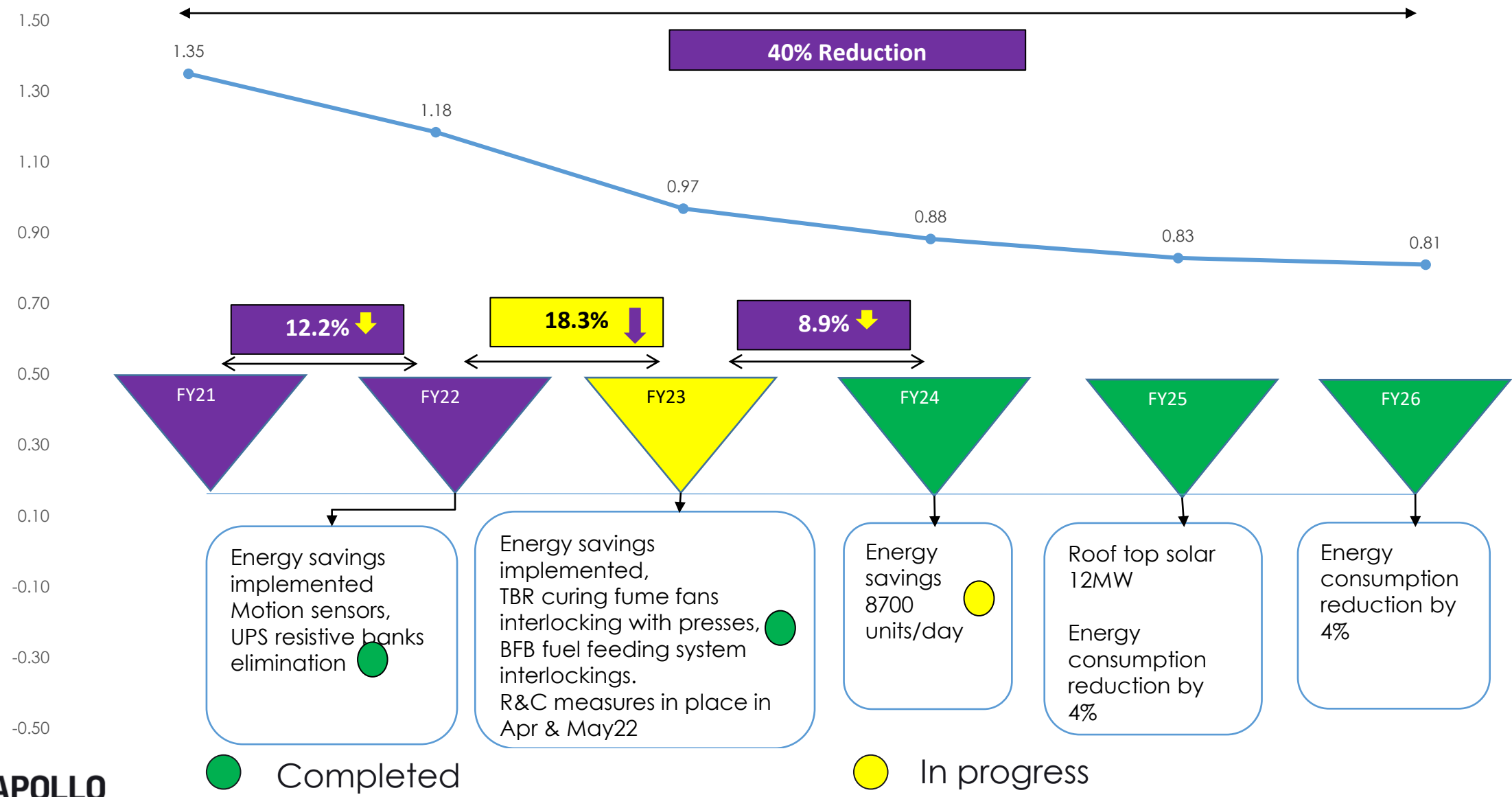
- Improvement of Boiler generation efficiency ●
- Sustenance of CFB with 100% Biomass ●

Steam consumption reduction 3%

Sustainability – CO2 Emission Intensity Reduction



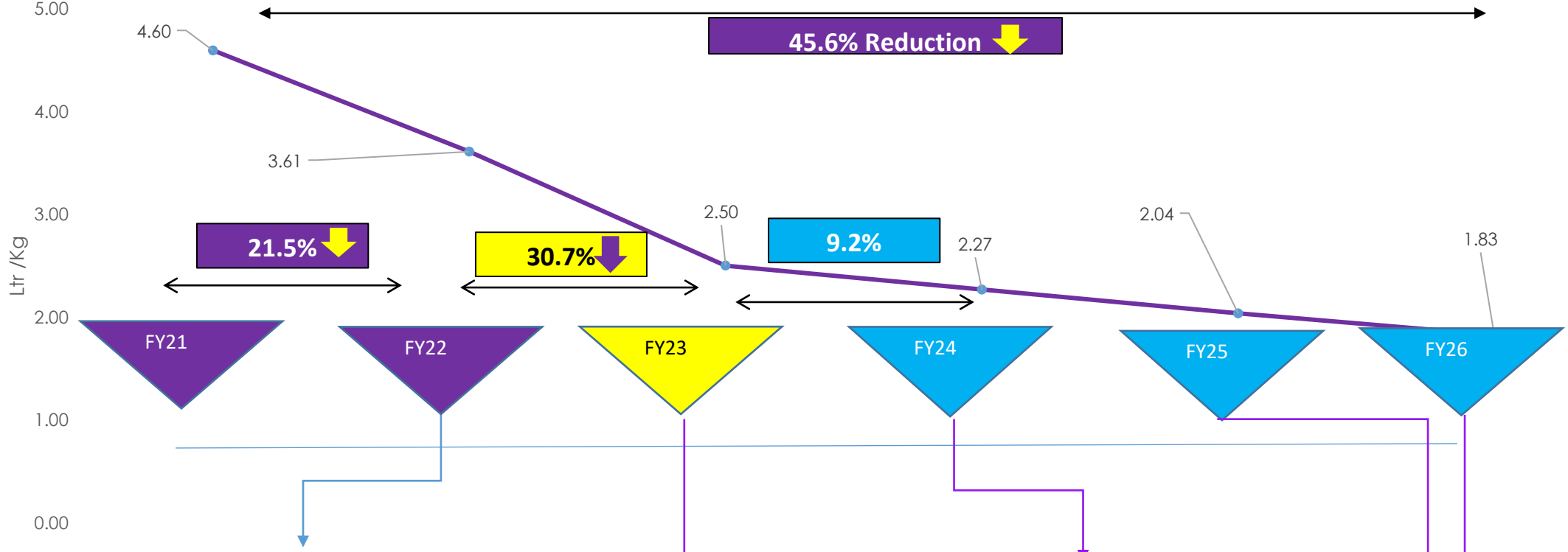
Scope#2 - CO2 Emission Intensity Reduction (tCO2/MT)



Sustainability – Water sustainability



Water sustainability (Ltr/Kg) Road Map



- Rain water usage to Horticulture ●
- Reuse of HVAC Condensate apprx. 40 KLD in CTs ●
- Improve Flash steam recovery from 0 to 50 KLD ●
- Overall steam condensate recovery improvement from 45% to 80% ●

- Zero Overflow from ETP & STP Pits achieved by modified level sensing device. ●
- Implemented the 60% drip irrigation system for Horticulture. ●

- Connecting all washrooms to STP treatment system to be Implemented ●
- Sludge drying beds to be made to avoid water losses during storage tank and collection pits maintenance ●

Steam consumption reduction 3%

Corporate Social Responsibility

Healthcare for Trucking Community



- **3,28,068** Beneficiaries coverage in awareness activities in and OPD in Vijayawada Andhra Pradesh From 2011.

Healthcare for Trucking Community



- Community Solid Waste Management for Chinnapanduru Panchayath covering **477** households and commercial shops.
- INR **61523** /- monetary income generated through dry waste sales from the project and utilized towards the project
- **2** ELT facility was set up in Chinnapanduru Primary school and around 122 children are using it.
- Till FY 23, **213** individual household toilet with bathing facilities provided to Racherla and Chinnapanduru Panchayath.
- Multiple awareness program conducted in both villages to promote Safe sanitation

Local Initiatives

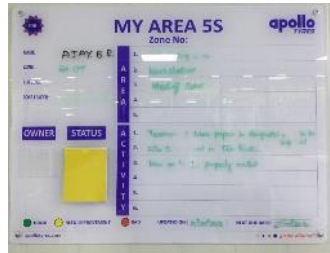


- **535** households of Chinnapanduru panchayath are currently using the Drinking water facility.
- Racherla Anganwadi renovation
- wall painting for primary school in Racherla
- Support for the DFO **100** Safety Uniforms for Fire officers
- Racherla Anganwadi renovation for kids safety in the school
- Covid Medical equipment's worth 19 Lakhs was provided to Government Hospital, newly established in Chittoor District. (Oxygen concentrator, Surgical gloves, CBC Machines & Kits, Auto analyser, fowler cot with IV stand with bed, Bed side locker, Nebulizer.)

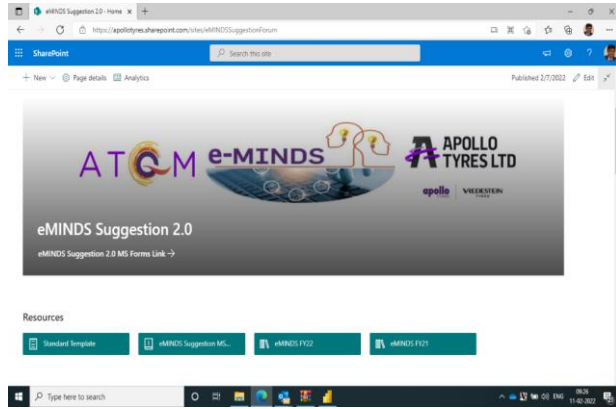
Employee Engagement Activities



Visual Factory & 5S



Employee Suggestion



Quality Control Circle



High Impact Projects



Employee Engagement Activities



Gender Diversity



Environment Day



Employee Appreciation



Employee Engagement Activities



Green Club



Riders Club



Toastmasters Club





Thank you

apollo
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