



SRF
We always find a better way

SRF

An Overview



What's Inside



Who we are...



Our Journey
& Legacy



Our Values



Aspirations
2030



Our
Businesses



Research and
Development



Our
Presence



Financial
Snapshot



Commitment
to Community




Our
Accolades





Who we are..


FY 2021 –'22: A Snapshot



 **7,000+** Global Workforce


 **₹ 1,889** Cr PAT

 Operations in **4** Countries*

 **₹ 12,549** Cr Revenue

 Exports to **90+** Countries

 **14** Manufacturing Plants

 **₹ 3,146** Cr EBIDTA

**India, Thailand, South Africa and Hungary*



We are a Multi-Business Chemicals Conglomerate



Actual Site Image of SRF's Chemicals Manufacturing Facility at Dahej, India

Our Business Verticals



**Specialty
Chemicals**

Fluorochemicals

**Packaging
Films**

**Technical
Textiles**

**Coated and
Laminated
Fabrics**

Our Ranking



GLOBAL RANKING



#1

Difluoro & Trifluoro Alkyl Intermediates



#2

Nylon 6 Tyre Cord Fabric



#3

Conveyor Belting Fabrics

INDIAN RANKING



#1

• Specialty Chemicals • Refrigerants
• Tyre Cord • Belting Fabrics • Coated Fabrics



#2

• Packaging Films • Laminated Fabrics



Leading the way...



ONLY COMPANY IN INDIA MANUFACTURING



F 134a and F 32 refrigerants using in-house technology



Dymel® F 134a/P, our propellant for asthma inhalers



Polyester Tyre Cord Fabrics



We are also known as



A Business with roots dating back **two centuries**



The promoters of **Lady Shri Ram College for Women**



The promoters of **The Shri Ram Schools Delhi NCR**



The winner of the **Deming** prize for two Businesses, namely Tyre Cord and Chemicals

Industries we serve...



Automotive



Pharmaceuticals



Air-conditioning



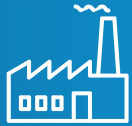
Agrochemicals



Mining



FMCG



Manufacturing



Chemicals



Food & Agro



Refrigeration



Technical Textiles



Advertising



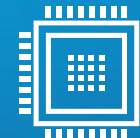
Renewable Energy



Lifestyle & Décor



Events & Exhibitions

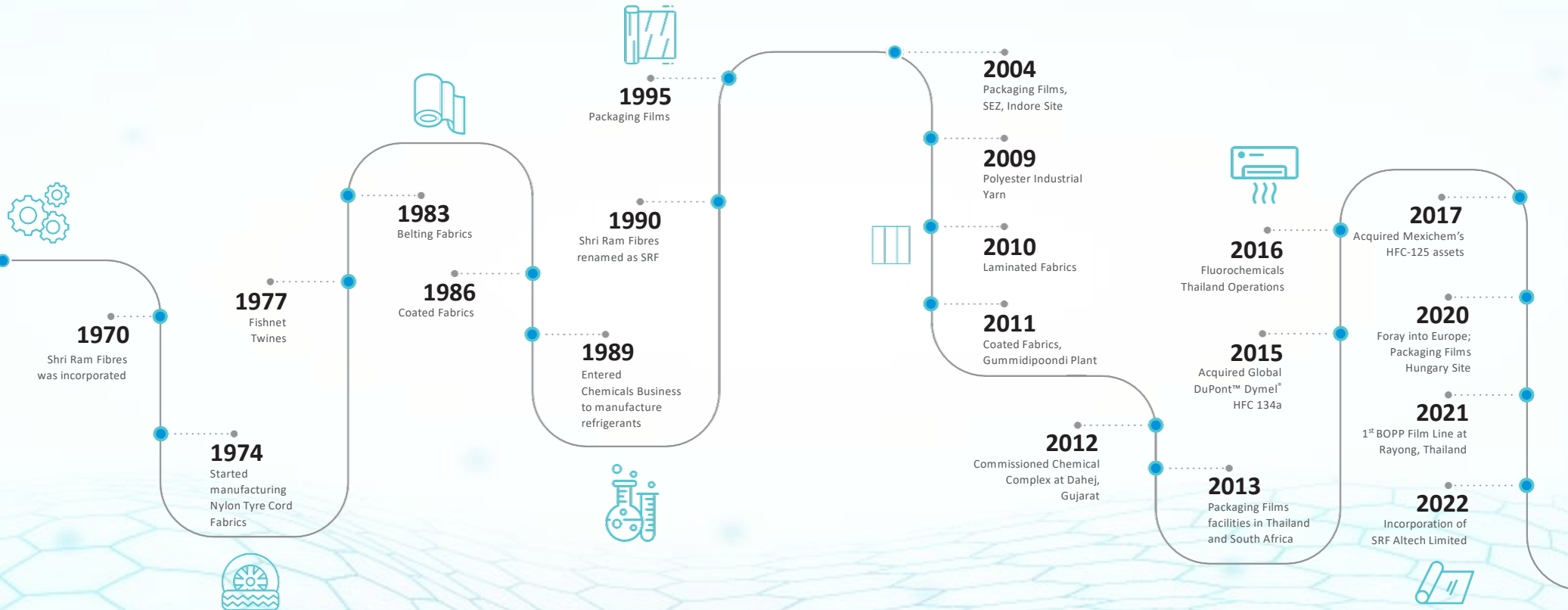


Electronics



Our Journey & Legacy

SRF's Journey



Sir Shri Ram



Founder, The Shri Ram Group
April 27, 1884 – Jan 11, 1963

1889

The Beginning of the DCM Group
Delhi Cloth & General Mills Ltd.
later known as DCM, was set up in Delhi

Evolution of the Shri Ram Group

DCM under the leadership of Sir Shri Ram transformed into an industrial empire manufacturing a vast variety of goods like – textiles, sugar, chemicals, vanaspati, pottery, fans, sewing machines, electric motors, and capacitors.

Our Glorious Journey Started In 1889

1909 – Sir Shri Ram joined DCM Ltd.

1920s – Sir Shri Ram was elected the Vice-Chairman of the Delhi Municipal Committee, the highest any Indian could reach in those days



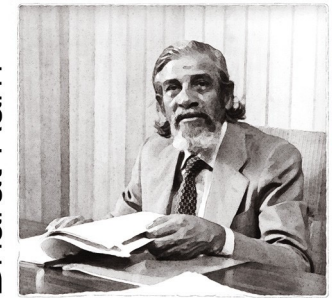
1930 – Sir Shri Ram was one of the first Indians to become the President of FICCI

1941 – Sir Shri Ram was knighted

1944-45 – Sir Shri Ram was one of the seven architects of the Bombay Plan which was set up to advise the future Indian Government on its Industrial Policy

1957 – Pt. Nehru invited Sir Shri Ram to become the Chairman of the public sector, Sindri Fertilizers and Chemicals and turn it around with his astute business acumen

Dr. Bharat Ram



Founder Chairman, SRF
October 15, 1914 – Jul 11, 2007

1958 – Chairman of DCM

1965 – President of FICCI

1967 – Chairman of Indian Airlines



1969 – First Asian President of International Chamber of Commerce



पद्म भूषण

1972 – Awarded Padma Bhushan by the Indian Government

Our Legacy



Mr. Arun Bharat Ram



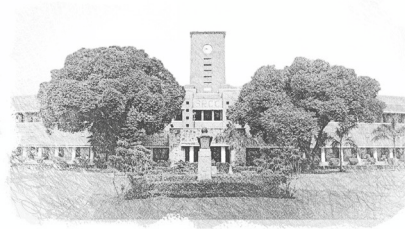
Managing Director
SRF Limited, Since 1975

2012 – Chairman, The Shri Ram Schools, Delhi NCR

2017 – Indian Chemical Council (ICC) Lifetime Achievement Award

2019 – EY Entrepreneur of the Year India Award in the Manufacturing category

Much before the Government of India mandated CSR spend, Mr. Arun Bharat Ram has been instrumental in driving community engagement initiatives in the areas of education, vocational skills & livelihood programs and natural resource management.



Education

1926 – Sir Shri Ram set up the Shri Ram College of Commerce in New Delhi

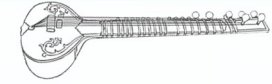
1956 – Sir Shri Ram established the Lady Shri Ram College in New Delhi



1988 – Padma Shri Mrs. Manju Bharat Ram set up The Shri Ram Schools in New Delhi and Gurugram



Art & Culture



The Shri Ram family set up The Shri Ram Centre for Arts & Culture and the Shriram Bhartiya Kala Kendra, New Delhi

Sports



1945 – DCM Football Tournament started in Delhi, the first tournament in the country which invited foreign club teams to participate along with the Indian teams

1975 – SRF Golf Matchplay - The oldest professional tournament on the Indian golf circuit played till 2011

Concern for Employees

Sir Shri Ram was one of the pioneers in the establishment of the concept of provident fund, bonus, free housing & schooling for children of employees

Sir Shri Ram encouraged workers to buy DCM shares. By 1923, a quarter of DCM was owned by its employees

Sir Shri Ram started workers' and officers' participation on the board in DCM in 1938

SRF is one of the first companies in India to adopt a death & disability policy



2000-01 – President of CII

2004 – Took over as Chairman & MD of SRF Limited and turned it into a leading, diversified chemicals conglomerate

2006 – Jamsetji TATA Award for Quality



2007 – Chairman, Lady Shri Ram College for Women

2008 – Conferred the Officer's Cross of the Order of Merit by the Federal Government of Germany



CHAIRMAN EMERITUS



Arun Bharat Ram

SRF'S LEADERSHIP



Ashish Bharat Ram

Chairman & Managing Director



Kartik Bharat Ram

Joint Managing Director



Prashant Yadav

President & CEO –
Fluorochemicals Business
& Technical Textiles Business



Anurag Jain

President & CEO – Specialty
Chemicals Business
& Chemicals Technology Group



Prashant Mehra

President & CEO – Packaging
Films Business, Coated &
Laminated Fabrics Business



Rahul Jain

President & CFO



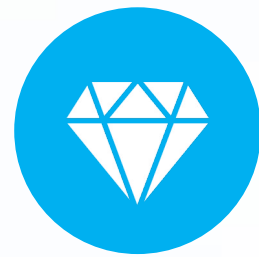
Ajay Chowdhury

President &
CHRO



Sanjay Rao

President & CIO



Our Values

Our Values



R

I

N

E

W

Respect

Integrity

**Non-
discrimination**

Excellence

Well-being

Our values guide the way we work with our business partners, within our communities, and with each other.



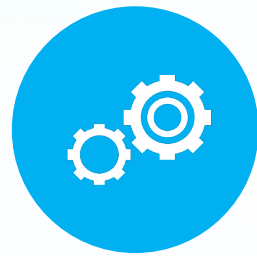
Aspirations 2030

We will continuously strive to be known for our Aspirations 2030



ASPIRATIONS 2030





Our Businesses

Fluorochemicals Business



A Global Scale Fully Integrated HFC Player

Fluorochemicals - Our Offerings



Refrigerants

Brand: FLORON

- F 22, F 32,
- F 134a, F 125
- **HFC Blends:** F 410A, F 404A, F 407C, F 600a, F 467A



Industrial Chemicals

- Methylene Dichloride (MDC)
- Methyl Chloride
- Chloroform
- Carbon Tetra Chloride
- Trichloroethylene
- Perchloroethylene
- Hydrofluoric Acid
- Tetrahydrofuran
- Anhydrous Hydrogen Chloride



Pharma Grade

Brand: DYMEL

F 134a/P

Brand: FLORON

F 134a Propellant

BHIWADI SITE



Plants

- Refrigerants
- HFC Blends
- Chloromethanes

DAHEJ SITE



Plants

- Refrigerants
- Dymel[®] 134a/P
- HFC Blends
- Chloromethanes
- Fluoropolymer (*Upcoming*)

Serving Customers in more than 60 countries with 75% of Refrigerant Gas sales to Overseas Markets

Applications



Products	Applications
Refrigerants	As the cooling medium in room A/Cs, automobile A/Cs, commercial refrigeration
Metered Dose Inhaler (MDI) (F 134a/P)	As a propellant in asthma inhalers
Industrial Chemicals	<ul style="list-style-type: none">• As a solvent in Pharma & Agro chemical industries• Feedstock for our range of refrigerants• As cleaning agent in steel industry
Others: <ul style="list-style-type: none">• N-Butane• Cleaning Chemicals	<ul style="list-style-type: none">• Fuel for Butane torch• Commercial use for toilet bowl cleaning, floor & glass cleaning

Our Certifications:



- ISO 9001 : 2015
- ISO 14001 : 2015
- ISO 45001 : 2018
- ISO 14064 – Carbon foot-printing verification (1st Chemical Company in India)
- SA 8000 : 2014
- Responsible Care Logo

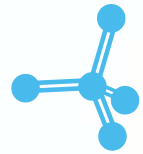


Specialty Chemicals Business



Responsible Care®
OUR COMMITMENT TO SUSTAINABILITY

Specialty Chemicals Business



**Organic and
Inorganic
Intermediates
for**



**Agrochemical
Industry**



**Pharmaceutical
Industry**

- **Capability to manufacture 10 Kg to 10 MT**
 - R&D Lab
 - Kilo Lab
 - Pilot Plant



- **Flexible Manufacturing Facilities**
- **Capability to manufacture 1 MT to 250 MT**



- **Dedicated Manufacturing Facilities**
- **Capability to manufacture 250 to > 3000 MTPA**



SCB's Unique Value Proposition



Deep Knowledge of Fluorine since the early 90s



Strong Differentiated Technology play



Contract Manufacturing with Strong Technology participation



Meeting Global Cost benchmarks



Specialty Chemicals - Our Offerings



Product / Service Category

Intermediates for AI / API

- Intermediates for the Agrochemical industry for Herbicides, Fungicides, Insecticides, etc.
- Intermediates for the Pharmaceutical industry for Active Pharmaceutical Ingredients (APIs)

Contract Research / Manufacturing

- Contract research and synthesis for intermediates for the Agro and Pharma innovators
- Production at commercial scale for Agro and Pharma majors

Intermediates for Other Applications

- Specialty chemicals that find application in Material Sciences, Surface Chemistry, etc.





Greenfield Site: Work started in 2010

Bird's Eye View of our Chemicals Complex at Dahej, Gujarat



Night View



World-class, Accredited, R&D Lab





Research & Development



R&D in the field of Fluorochemicals and Specialty Chemicals

R&D facilities at Bhiwadi and Gurugram, India



360+

Patent applications filed to date



110+

Patents granted globally



400+

people in R&D,
Engineering and Scale-ups



- **More than 125 molecules developed**
- **Scale-ups are carried out in the Pilot Plant**
- **In-house Safety studies for new molecules**
- **Introduction of novel technologies - Strong IP creation / protection**

SRF Packaging Films Business



Packaging Films Business



India



South Africa



Thailand



Hungary

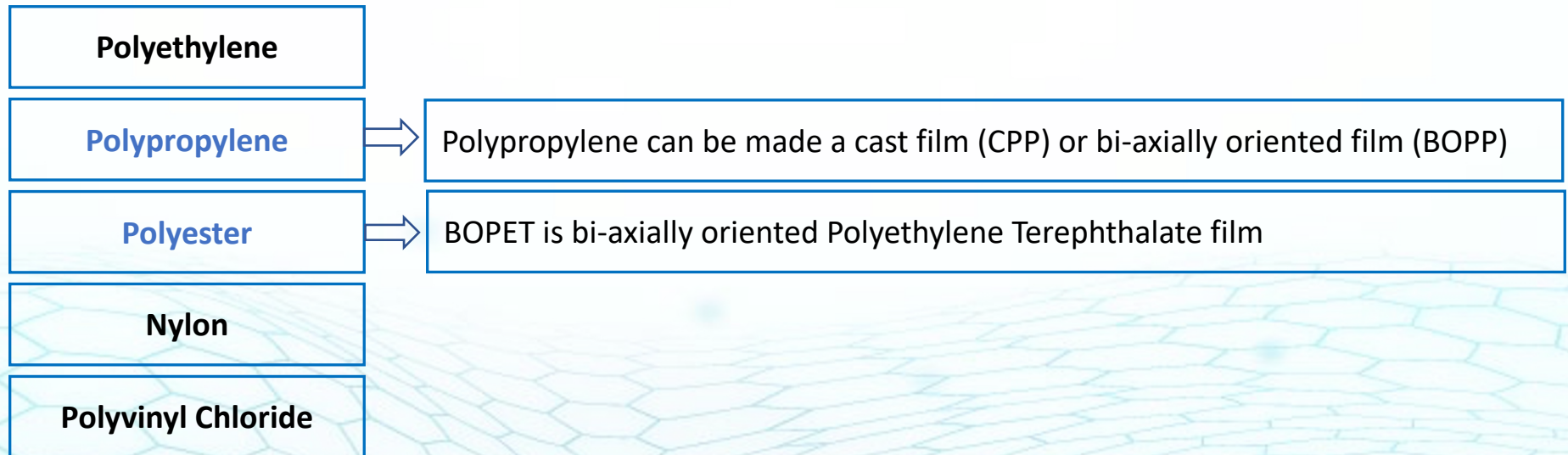
Serving over 90 countries



Classification of Plastic Films

Plastic film is a thin continuous polymeric material. Thicker plastic material is often called a “sheet”. These thin plastic membranes are used to separate areas or volumes, to hold items, to act as barriers, or as printable surfaces.

Almost all plastics can be formed into a thin film. Some of the primary ones are:



Plastic Film Laminates

Permanently assembled material of multiple layers (by heat, pressure, adhesives), so that the composite material achieves improved strength, stability, appearance or other properties from the use of differing materials

Typically, a flexible packaging **laminates** is a layered structure comprising of three different 'substrates' (plastic films)



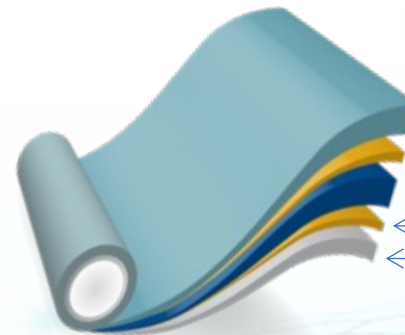
1

Plain Film



2

Printed Film



3

Flexible Laminate

Outer layer (for printing)
Adhesive
Core layer (for barrier)
Adhesive
Inner layer (for sealing)



4

Printed Flexible Pouch

Packaging Films – Our Offerings



**BOPET
films**

Brand: PETLAR

Transparent
Metallised
High-Performance



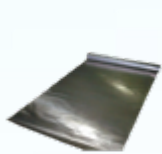
**BOPP
films**

Brand: OPLAR

Sealable
Non-sealable
Metallised
High-Performance



Applications



Metal Foil



Paper



Plastic Films



Jute



Woven Sacks



Mesh



Industrial

Flexible Packaging

Food

- Confectionery
- Dairy
- Bakery
- Household spices
- Ready-to-eat
- Pet food
- Tea & Coffee
- Milk Powder
- Flavored Powdered Drinks

Non-Food

- Cardboard
- Packaging for perfumes
- Shampoos, detergents
- Insecticides & pesticides

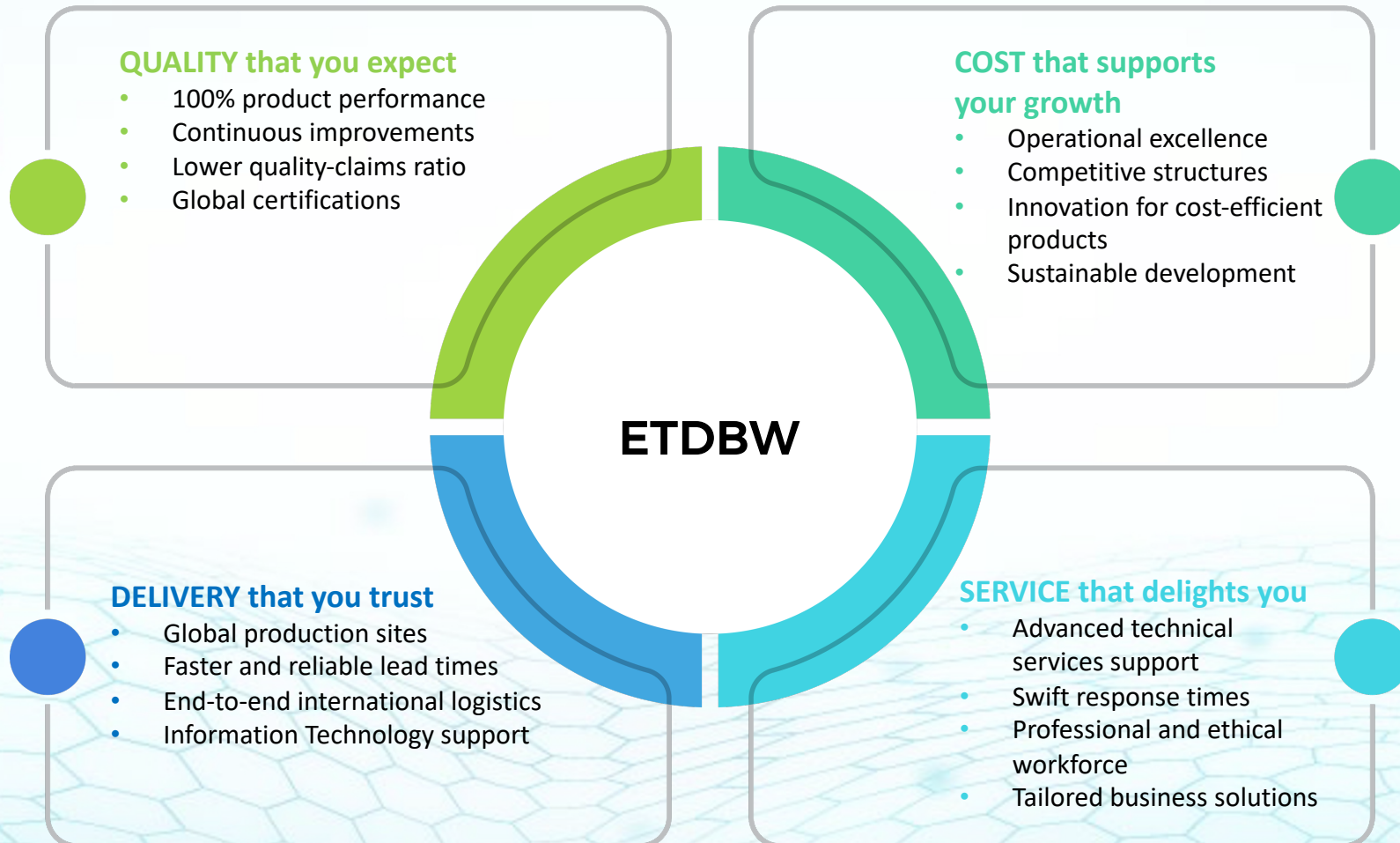
Industrial

- Hot stamping foils
- Electric cables
- Air ducting
- Thermal transfer
- Solar panels
- Electronics
- Flat screen display
- Battery separators

PFB's Unique Value Proposition



ETDBW EASY TO DO BUSINESS WITH



Our Global Capacity

Global Capacity – 311,500 MT

- BOPET : **209,500** MT
- BOPP : **102,000** MT
- **Upcoming** : **60,000** MT BOPP



Strong Customer Orientation



Significant % of Value-Added Products Sales



Certifications



ISO 9001: Quality Management

ISO 14001: Environmental Management

OHSAS 18001: Occupational Health & Safety

SA 8000: Social Accountability

ISO 50001: Energy Management System

FSSC 22000: Food Safety System Certification

SEDEX: Supplier Ethical Data Exchange

HALAL/ KOSHER

TQM Driven Robust Processes Accredited by Global Quality Standards

Member of BOPET Films Europe and Petcore Europe

Products Fully Compliant to US FDA, REACH & All Major Industry Specifications

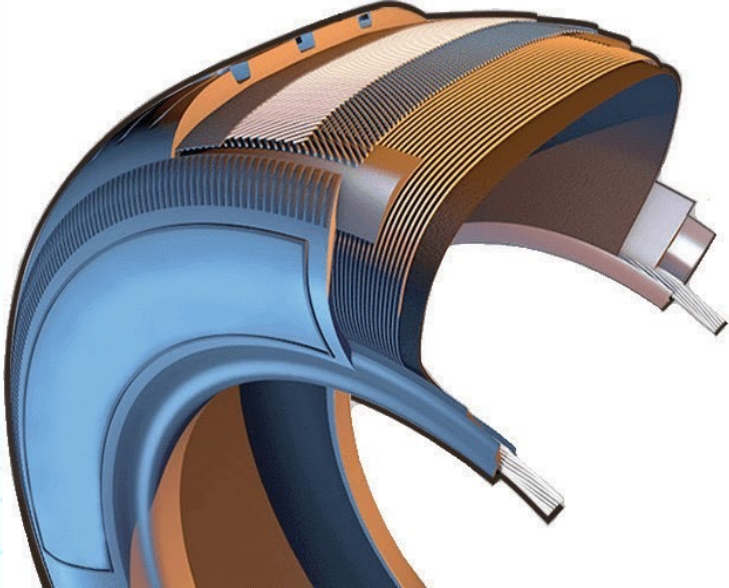
Our R&D Capabilities



- A comprehensive NPD lab
- Offline coating facility
- Pilot polymerisation plant
- Pilot printing and lamination machine
- Skill enhancement



Technical Textiles Business



Technical Textiles – Our Offerings



A textile product manufactured for non-aesthetic purposes. Finds application in textiles for automotive, medical textiles, geotextiles, among others.

Tyre Cord Fabrics

- Nylon Tyre Cord Fabric
- Polyester Tyre Cord Fabric

Belting Fabrics

Industrial Yarn

Polyester/Nylon





Tyre Cord Fabrics

- NTCF :Tyre Reinforcements in Bias Tyres
- PTCF : Tyre Reinforcements in Radial Tyres



Belting Fabrics

- Textile Conveyor Belts
- Breakers for Steel Belts
- Pipe Conveyors
- High Temperature Automotive Hoses
- Rubber Sheets
- Rubber Doors
- Special Purpose Static Covers



Industrial Yarn (Polyester/Nylon)

- Geo Textiles
- Seat Belts
- Ropes and Cordage
- Solid Woven Fabric
- Transmission Belts
- PVC Conveyor Belts
- Hoses
- Narrow Woven Belts
- Industrial Sewing Threads
- Fishing Net

Applications

Aerial View of Overland Conveyors – An Application of Belting Fabrics



Other Businesses



Coated Fabrics Business



Laminated Fabrics Business

Coated & Laminated Fabrics – Our Offerings



Coated Fabrics

Brands:
SRF TUFTOP, SRF FABAWN,
SRF DURALITE, SRF
DURASHIELD,
SRF DURATUFF, SRF ECOLITE,
SRF SAVEN

Applications include:

- Awnings
- Tents
- Pagodas
- Customized tarpaulin
- Static covers



Laminated Fabrics

Brands:
SRF FABGLOW, SRF Hi-GLOSS,
SRF FLEXIKAWACH, SRF Arjun

Applications include:

- Print banners
- Hoardings
- Billboards
- Tent dome covers
- Pandal covers





HR Practices & Policies



Empowerment & Well-Being

- We practice progressive, industry best and people friendly policies



Learning & Development

- Through our Talent Transformation Framework, we encourage people to learn, develop and discover their full potential



People Analytics

- We have an evolved approach towards analyzing and visualizing people data and decision making



Future-Ready

- We have a structured and tailor-made competency-based framework for managing talent identification and people development



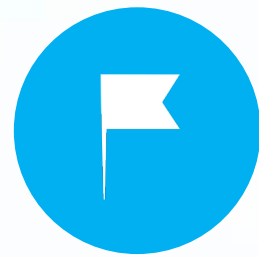
Our Unique Policies



More than **60 formalized people policies** for Officers across SRF

Some key points are:

- PRAISE
- Long Service Award
- Self Education
- Referral Scheme
- Sabbatical
- Sahyog
- Death and Disability
- Scholarship for Children of Employees & SC/ST Students



Our Presence

Our Presence



FLUOROCHEMICALS & SPECIALTY CHEMICALS

2 National Operations

1. Rajasthan, India - Bhiwadi
2. Gujarat, India - Dahej

TECHNICAL TEXTILES

4 National Operations

1. Madhya Pradesh, India - Malanpur, Bhind
2. Tamil Nadu, India - Manali
3. Gummidipoondi
4. Viralimalai

PACKAGING FILMS

3 National Operations

1. Uttarakhand, India- Kashipur
2. Madhya Pradesh, India - Special Economic Zone (SEZ),
3. Pithampur, Indore - Bagdoon, Pithampur, Indore

3 International Operations

4. KwaZulu - Natal, South Africa
5. Rayong, Thailand
6. Jaszfenyszaru, Hungary

LAMINATED FABRICS

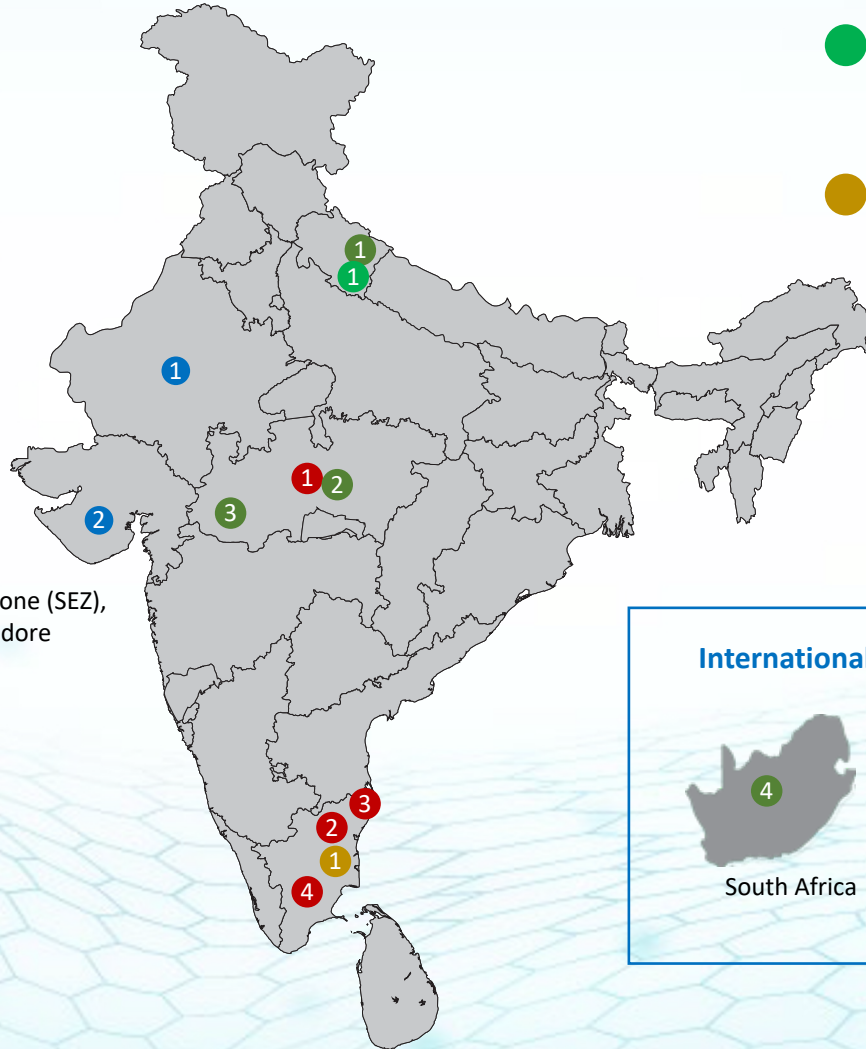
1 National Operation

1. Uttarakhand, India - Kashipur

COATED FABRICS

1 National Operation

1. Tamil Nadu, India - Gummidipoondi



International Operations



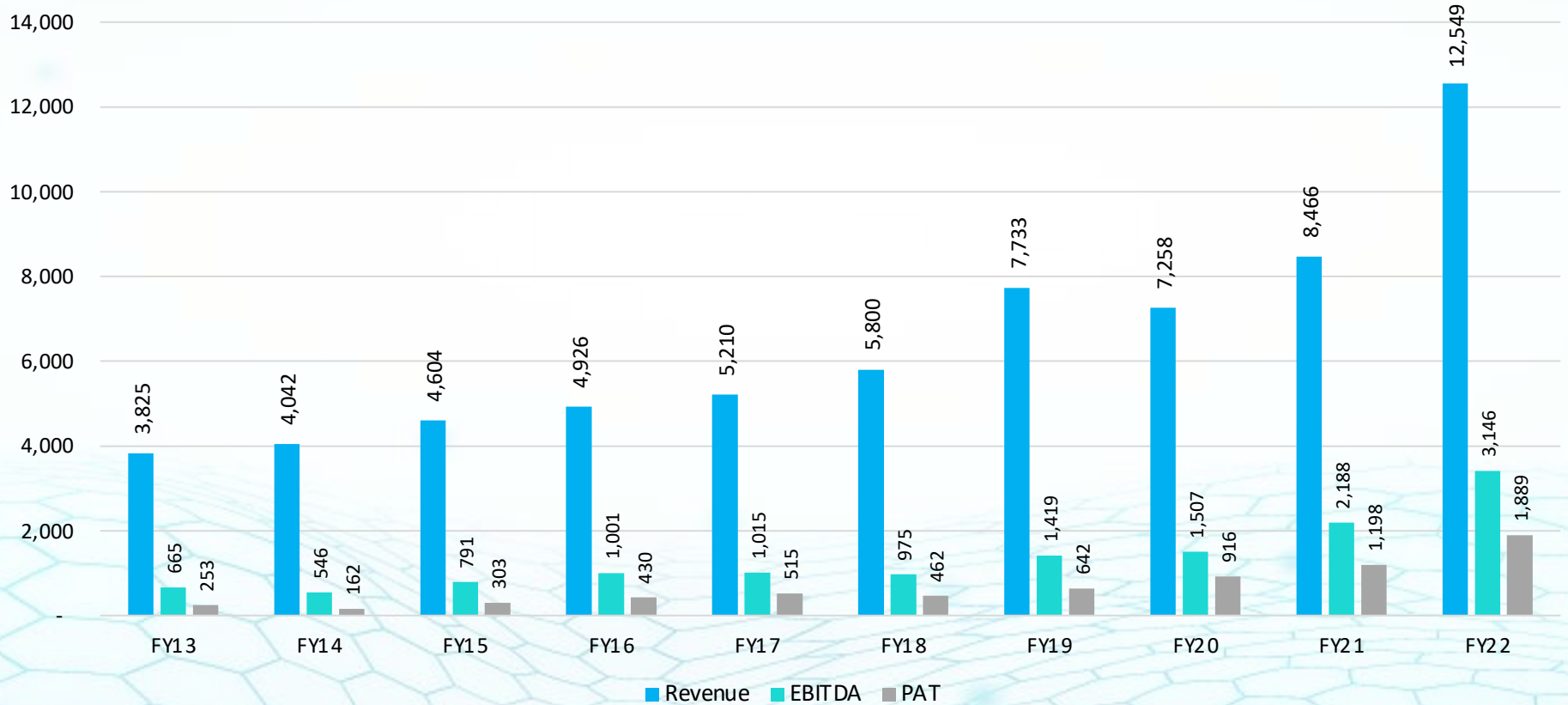


Financial Snapshot

SRF Consolidated Financials



Revenue 5 yr. CAGR 19%
 EBIDTA 5 yr. CAGR 25%
 PAT 5 yr. CAGR 30%



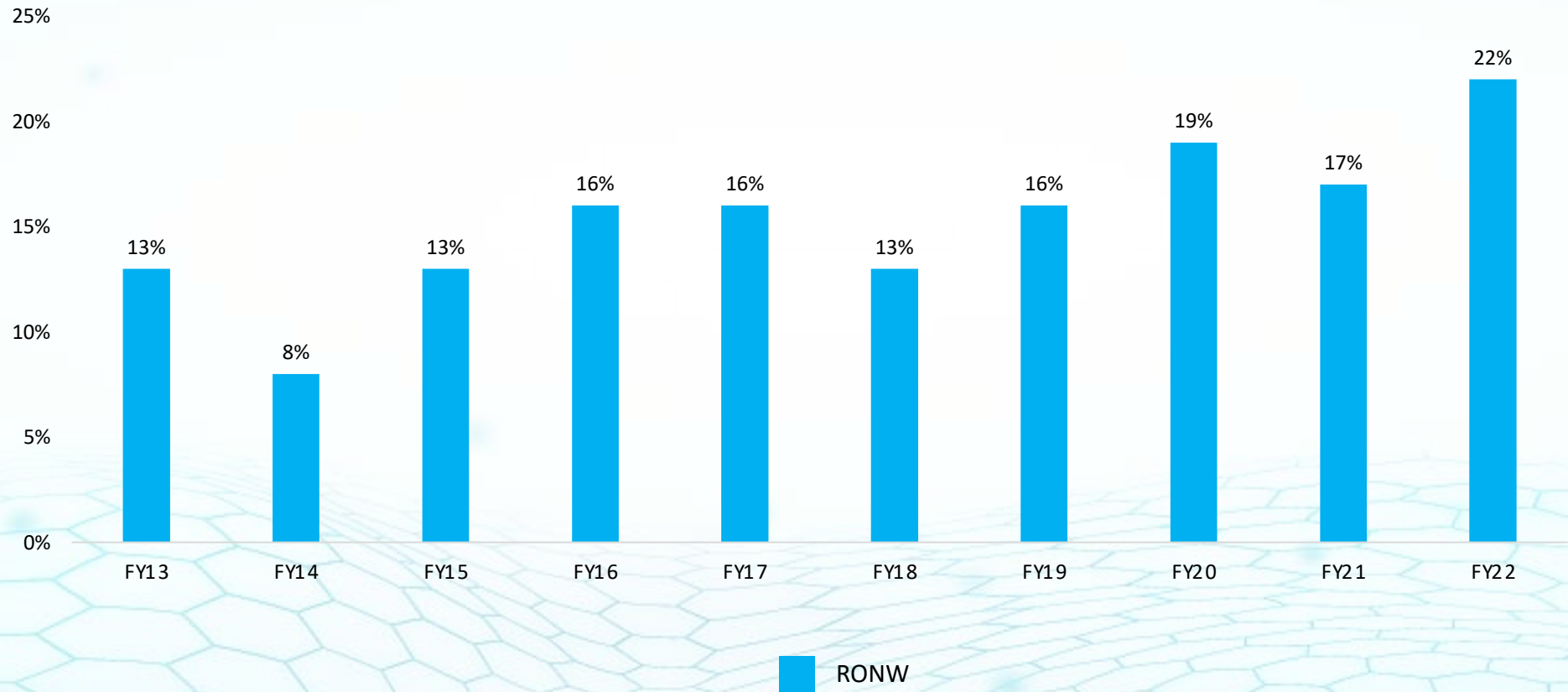
*CER income inflow until FY13

**Numbers have been shown only for continued operations from FY20 onwards

Consolidated Net Debt / Equity & Net Debt / EBIDTA



Key Ratios - RONW



*CER income inflow until FY13



Commitment to Community

SRF Foundation: Community Partnerships



**School
Education**



**Vocational
Skills**



**Natural Resource
Management**



SRF Foundation's Key Initiatives



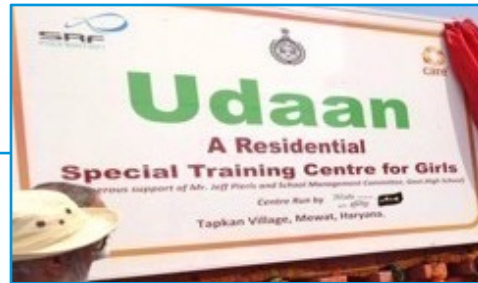
Model School Program

Infrastructural upgrades to enhance learning



Udaan

A residential learning camp for adolescent girls



World on Wheels

Promoting e-learning & entrepreneurship programs



Impact of our Community Engagement Initiatives



School Education Program



12 States



414 Schools



24 Locations



152,529+ Students



Vocational Skills Program



3 States



80% Learners employed



5 Skill Centers



6,500+ underprivileged youth

Impact of our Community Engagement Initiatives

Natural Resource Management Program



8,200+

farmer families positively impacted



Agro forestry on reclaimed land



Plantation



1,765

hectare of wasteland converted into cultivable land



Rain water harvesting



Check Dam

Our Partners



SRF Foundation collaborates with the Government, Schools, NGOs & Corporates for greater impact

The IBM logo, featuring the letters 'IBM' in a blue, horizontally-striped font.	The HP logo, consisting of the lowercase letters 'hp' in white inside a blue circle.	The IndiGo logo, with 'IndiGo' in a blue, sans-serif font.
The Coca-Cola logo, featuring the brand name in its signature red script font.	The Times Group logo, which includes a royal crest above the text 'TIMES GROUP' in a black, serif font.	The Schneider Electric logo, with 'Schneider' in green and 'Electric' in a smaller green font below it, accompanied by a green circular icon.
The Tetra Pak logo, a circular emblem with 'PROTECTS' at the top, 'WHAT'S GOOD' at the bottom, and 'Tetra Pak' in the center.	The Capgemini logo, featuring a blue spade icon to the left of the word 'Capgemini' in a blue, serif font, with the tagline 'CONSULTING.TECHNOLOGY.OUTSOURCING' below it.	The PNB Housing Finance Limited logo, with 'pnb Housing' in white on a red background and 'Finance Limited' in white on a yellow background below it.

Other Partners:

Directorate of Elementary Education of Haryana, Rajasthan, Gujarat, Madhya Pradesh, Uttarakhand, Karnataka, Uttar Pradesh, Assam and Tamil Nadu, Sarva Shiksha Abhiyan, SCERT Haryana, Enrich Agro, Sequoia, UN Habitat, Brillio Technologies, Sunrise Sports, Signify, American India Foundation (AIF), CARE India, SMU, MDA, FORE.



Our Accolades

Accolades



2004

- **Deming Prize**
for the Tyre Cord Business



2006

- **Greentech Safety Platinum Award**
- **Jamsetji Tata Award**
conferred on Chairman,
Mr. Arun Bharat Ram by the Indian
Society for Quality (ISQ)

2007

- **Greentech Environment Excellence Platinum Award**

2008

- **CII ITC Sustainability Award 'Strong Commitment'**
- **Officer's Cross of the Order of Merit**
conferred on Chairman, Mr. Arun Bharat
Ram by the Federal Government of
Germany

2009

- **CII ITC Sustainability Award 'Significant Achievement'**
- **International Labour Organisation (ILO)** Recognition for creating awareness on HIV AIDS

2011

- **Forbes 'Best Under a Billion List'**



2012

- **Deming Prize for Chemicals Business**
- **Businessworld FICCI CSR Award**

2013

- **Aaj Tak Care Award** Category "Education"
- **Greentech CSR Award**

Accolades



2014

- **Pt. Madan Mohan Malviya Award**

2015

- **CRY Child Rights Champion Award**

2016

- **Syngenta Supplier Award** for Health, Safety & Environment

2017

- **Bayer Supplier Award** for Sustainability

2017

- **ICC (Indian Chemical Council) Lifetime Achievement Award** to Chairman, Mr. Arun Bharat Ram



- **FICCI CSR Award** for Education, Skill Development and Livelihood
- **YES Bank Natural Capital Award** Eco-Corporate of the Year – Manufacturing
- **CHEMEXCIL Export Award**

2018

- **Syngenta Supplier Award** for Innovation
- **Sword of Honour** by the British Safety Council



- **Bhamashah Award** by the Rajasthan Government
- **Oracle Cloud Platform Innovation Award** in the “Application Development & Deployment” category

Accolades



2019

- **The Economic Times Family Business of the Year** (Large Companies) Award



- **ICSI** (Institute of Company Secretaries of India) **CSR Excellence Award** – 2019 in the Best Corporate (Medium) category
- **National CSR Award 2018 in the category – Corporate Awards** in CSR in Challenging Circumstances – North by His Excellency, the President of India, Shri Ram Nath Kovind



2020

- **EY Entrepreneur of the Year 2019** in the manufacturing category conferred on Chairman, Mr. Arun Bharat Ram



- **ICC Award for Excellence in Management of Health & Safety** to SRF Bhiwadi

2021

- SRF's Specialty Chemicals Business awarded the **Syngenta Supplier Award 2020** for performance
- **'STATE SAFETY AWARD – 2021'** by the Rajasthan Government
- Managing Director, Mr. Ashish Bharat Ram named **India's Best CEO** in the emerging company category by Business Today



Accolades



- **CSR-Best STEM Education Project** – Through Partnership (Large Impact)' at the 9th INDIA CSR Awards
- Mr. Ashish Bharat Ram, MD of SRF Ltd. conferred the "**Transformational Leader Award -Mid Cap company category**" for 2020 by the Asian Centre for Corporate Governance & Sustainability
- Highly Commended Winner of the **Best Working Capital Management Solution** at the Adam Smith Awards Asia 2021
- **SRF's Packaging Films Business** facility in South Africa bestowed the 5 Star rating for **Occupational Health and Safety** by the **British Safety Council**

- SRF Annual Report FY21 wins a Silver and a spot in the **Top 100 Communications Materials** at the 2021 Spotlight Awards by the League of American Communications Professionals LLC



- SRF's Packaging Films Business – Indore conferred the **Quality Sustainability Award** at the international convention, organized by the **International Academy for Quality (IAQ)**

2022

- **Certificate of Sustainability by BW BUSINESSWORLD** – Top 50 category
- Best Family Business (Giga category) at the Moneycontrol Indian Family Business Awards



- Recognized as the **'Employer of the Future 2022'** by Fortune India

Thank You