

EPC Industriè Ltd



Contents

- **Micro Irrigation**
 - **Need for Micro Irrigation**
 - **Industry size & opportunity**
- **EPC Industriè Ltd.**
- **EPC Product & Service Portfolio**
- **Financial Performance Q2 F'16 & YTD Sep F'16**
- **Future Plans**
- **The Mahindra Group**
- **Mahindra Agri Business**



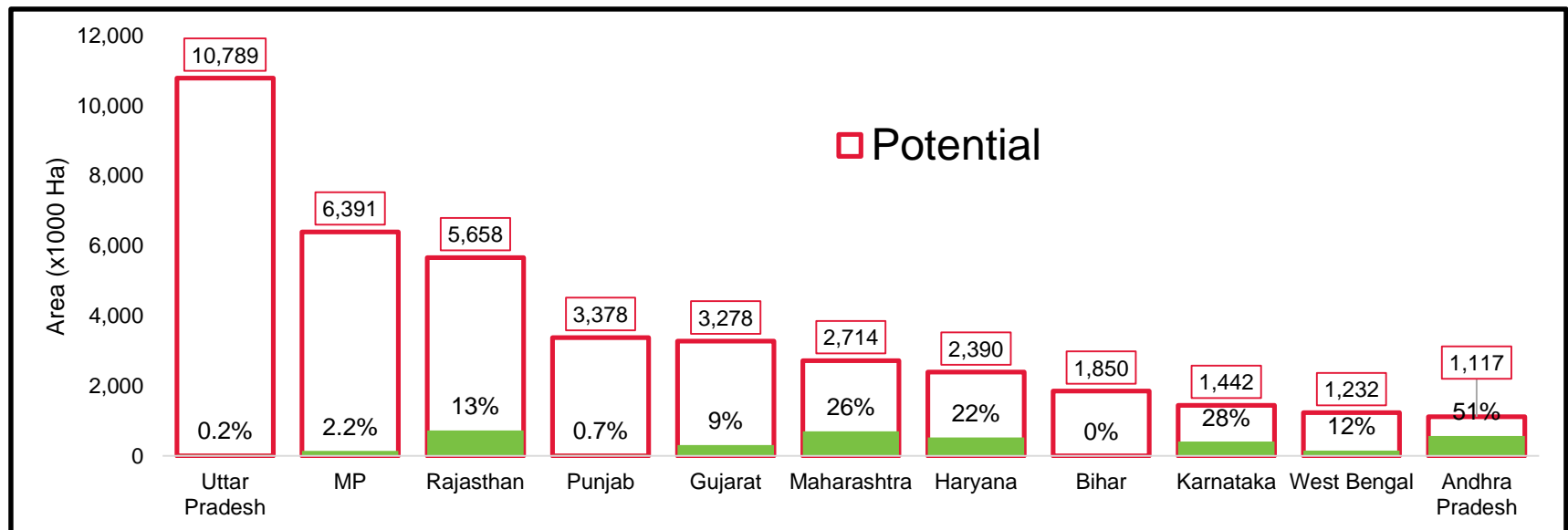
Micro Irrigation Industry

Need for Micro Irrigation

- India a water stressed economy ; will be water scarce by 2050
- 70% of the water available used for agriculture
- Need for water efficient methods of irrigation
- Benefits of Micro Irrigation:
 - Water saving: 30% - 40%;
 - Labour saving: 30% - 50%;
 - Power saving: 20% - 40%;
 - Fertilizer & Nutrition saving: 30%
 - Productivity improvement: 10% - 30%.

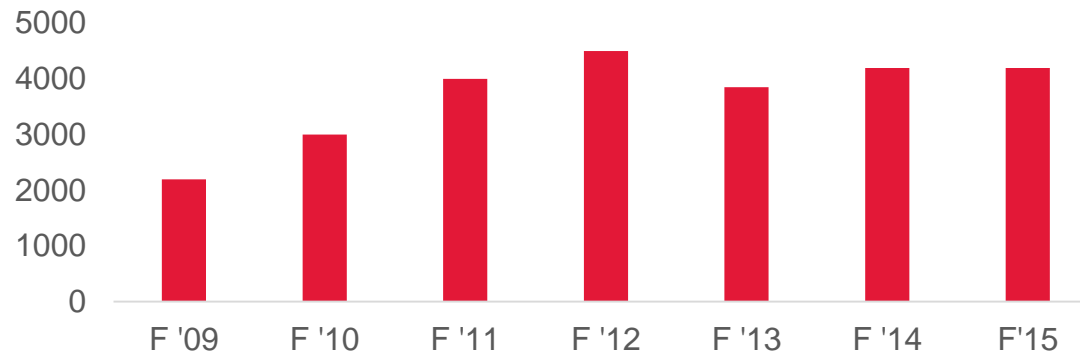
Industry Size & Opportunity

- Strong potential for growth
 - Almost 60% of cultivable land is still Rain fed in India.
 - 70 million Hectare Irrigated; Only 6 Million is under MIS



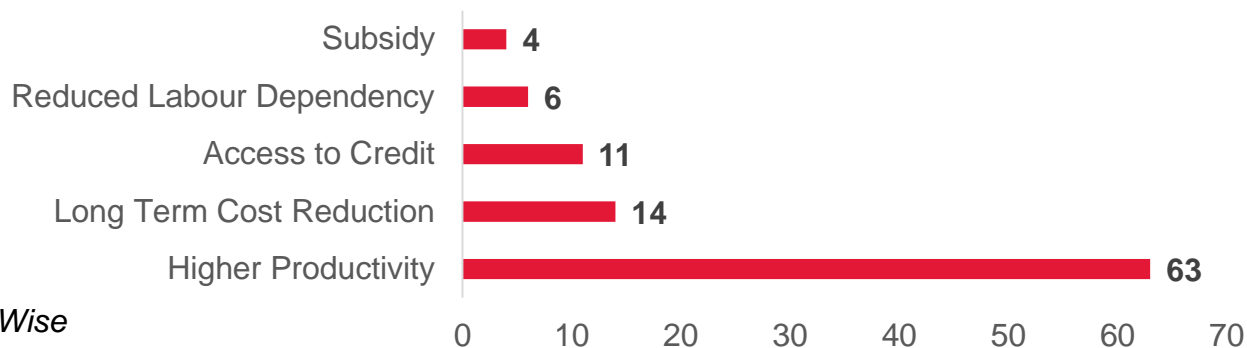
Industry Size & Opportunity

- The industry has been flat for the last 4 years, showing early signs of recovery this year



- Strong Customer Pull

Reasons for Micro Irrigation Purchase



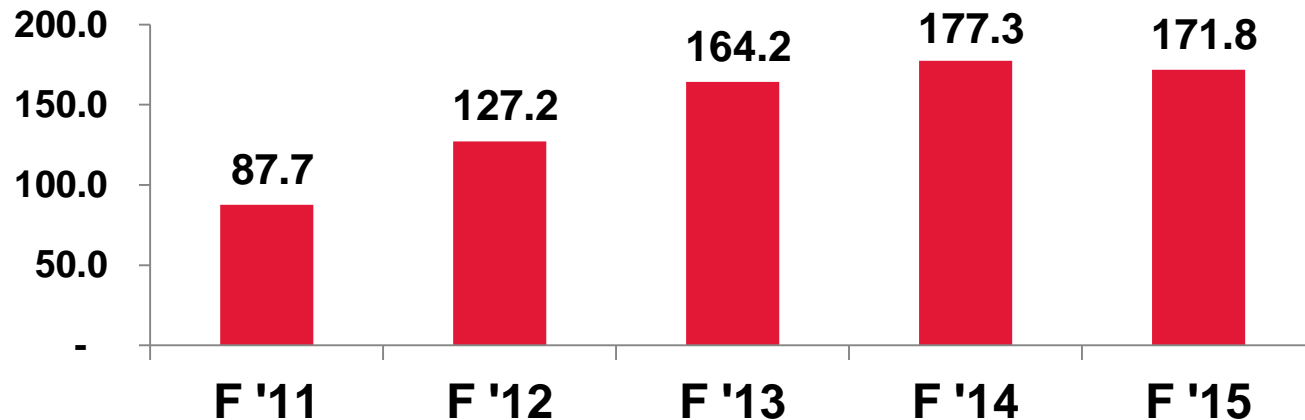
Industry Size & Opportunity

- Industry becoming more structured & streamlined
 - Gujarat & AP Project markets use Tripartite agreements
 - Use of IT to streamline 'application to subsidy disbursement' cycle
- Bank support
 - Banks Financing MIS systems aggressively.
 - SBI, DENA, ICICI & IDBI initiators
 - Loan availability has increased business potential

EPC Industriè Ltd.

- Pioneered Micro-Irrigation Systems (MIS) in India in 1986
- Registered in 15 states under subsidy program in India
- More than 600 channel partners; 11 regional offices.
- M & M Ltd. holds majority stake & Management Control

Revenue



Revenue in Rs. Cr.

Strong All India Network



- Open Markets
- Project Markets*
- Newly Opened Markets



Product & Service Portfolio

Strong Presence in Various segments

- **Drip irrigation System:** Targeted, intelligent application of water, fertilizer, and chemicals directly to the plant roots



- **Sprinkler Irrigation System:** Suitable for modern farming as they offer quality, high yield and cost efficiency



Product Portfolio

- Superior Product Quality
- Good Brand Equity in Indian market.
- All the products comply to Indian Standards.

Product Portfolio: Drip Irrigation

- Online Drippers



- Inline Drippers

- Round Inline drippers



- Flat Inline drippers



- Irrigation laterals



Product Portfolio: Drip Irrigation

■ Drip Fittings

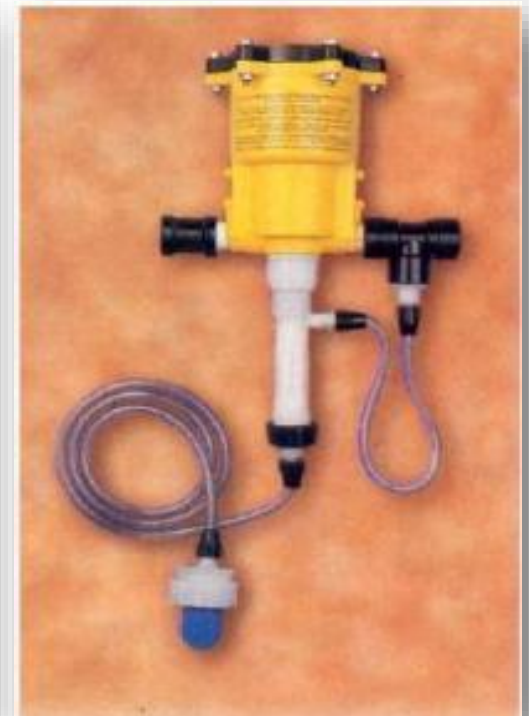


■ Drip Filters



Product Portfolio: Drip Irrigation

- Fertigation Equipment



Product Portfolio: Sprinkler Irrigation

- Sprinkler Irrigation pipes



- Pipe fittings



- Sprinkler Nozzles



Field Services

- **Survey:** Surveys of individual farms to collect data on crops to be irrigated, its water & fertilizer requirements and agronomical practices to be followed
- **Design:** Complete designing of drip / sprinkler Irrigation layouts for individual farms as well as for large plantation projects
- **Installation & Commissioning:** Installation & commissioning of micro-irrigation (drip & sprinkler) systems by trained and experienced team

Field Services

- Agronomy service
- Demo Plots to explain & establish best practices
- Soil and water testing
- Crop Suitability recommendation
- Fertigation & Irrigation schedules as per crop need
- Farmer & Dealer training for
 - Operation & maintenance of irrigation systems
 - Fertigation
 - Suitable chemical treatments

Field Services



Agronomy Training



Demo Plots



Sales & Marketing

Sales & Marketing



Farmers Training Program



Van Campaign



Rural Exhibition Participation

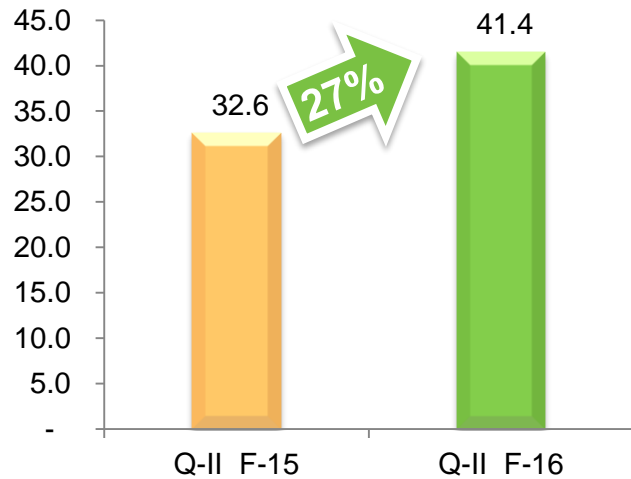


Demo Plot

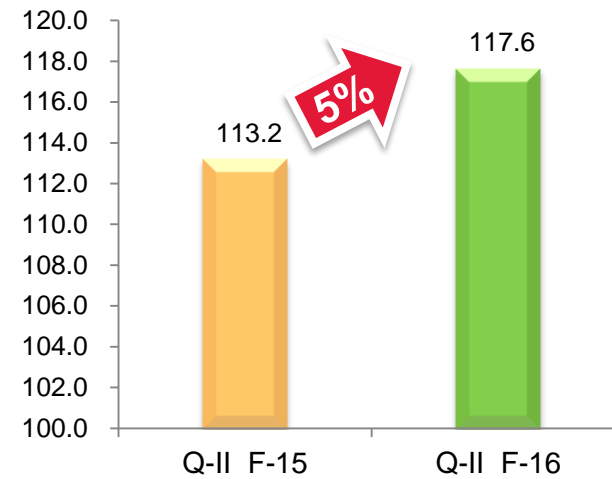
Financial Performance for Q2 F'16 and YTD Sep-2015

Performance at Glance Q-II F-16

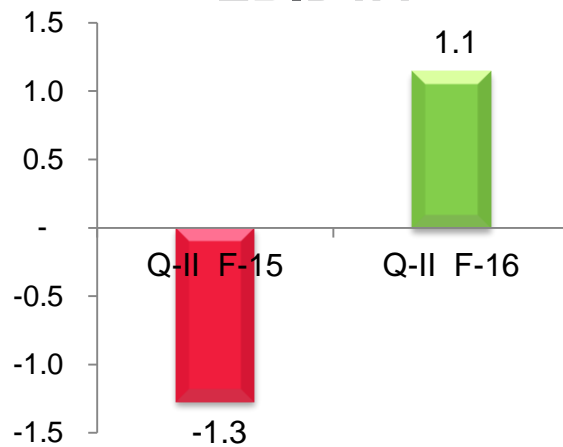
Revenue



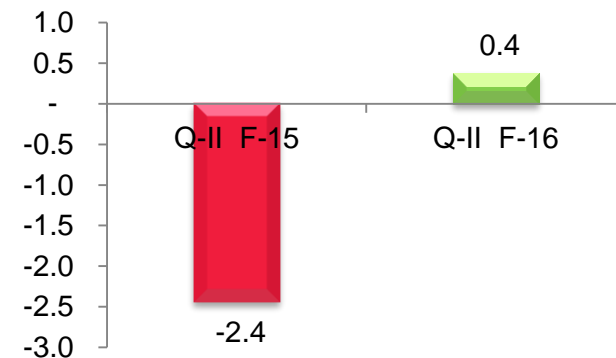
Capital Employed



EBIDTA

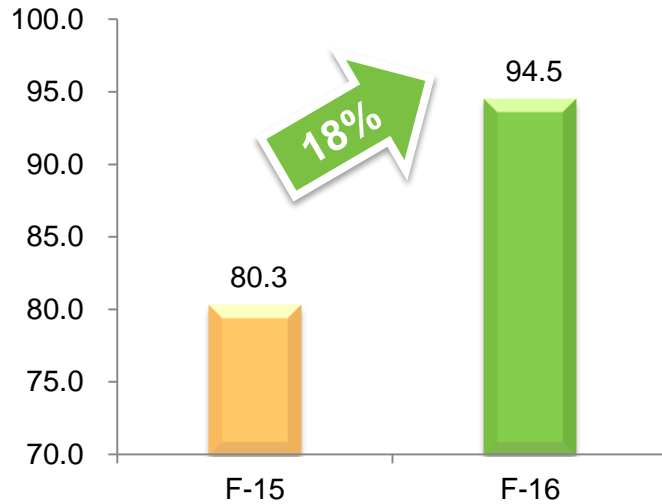


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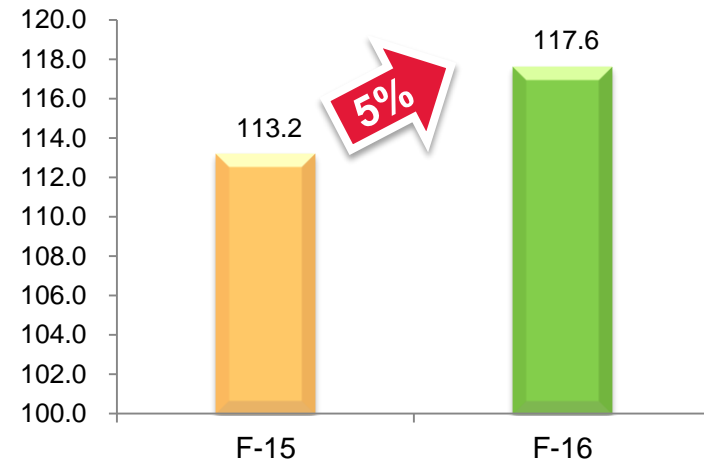


Performance at Glance YTD Sep-15

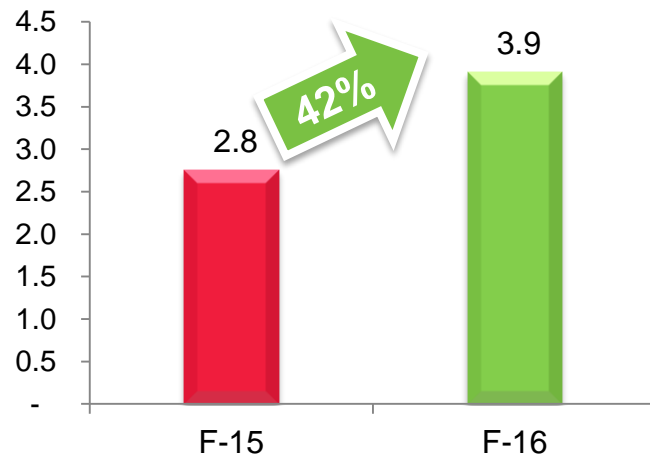
Revenue



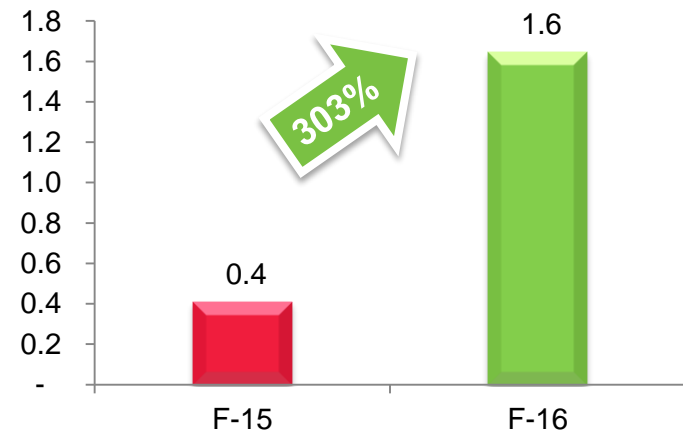
Capital Employed



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Reducing Subsidy Dependence

New Allied Businesses



Greenhouse



Pumps



Managing Large Projects



Large Community Projects

Newer Revenue Streams



Landscaping

Newer Revenue Streams



Exports



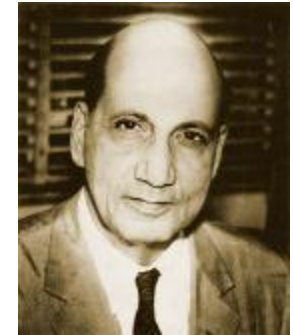
The Mahindra Group

The Mahindra Group

- Founded in 1945 as a steel trading company
- Diversified into manufacturing Willy's jeeps
- India's 7th Largest Group - From Automotive to Defense to Construction to IT to Agriculture
- Recognised as a global leader in Utility Vehicles and Tractors
- More than 120,000 people across 110 subsidiaries, 6 JVs and 11 Associates, in more than 100 countries



J.C. Mahindra



K.C. Mahindra



Mahindra Rise: House of Mahindra

CORE PURPOSE

“We will challenge conventional thinking and innovatively use all our resources to drive positive change in the lives of our stakeholders and communities across the world, to enable them to Rise.”

**Accepting No
Limits**

**Alternative
Thinking**

**Driving
Positive
Change**

**CORE VALUES : Good Corporate Citizenship | Professionalism | Customer First | Quality Focus |
Dignity of the Individual**



Mahindra Agri Business

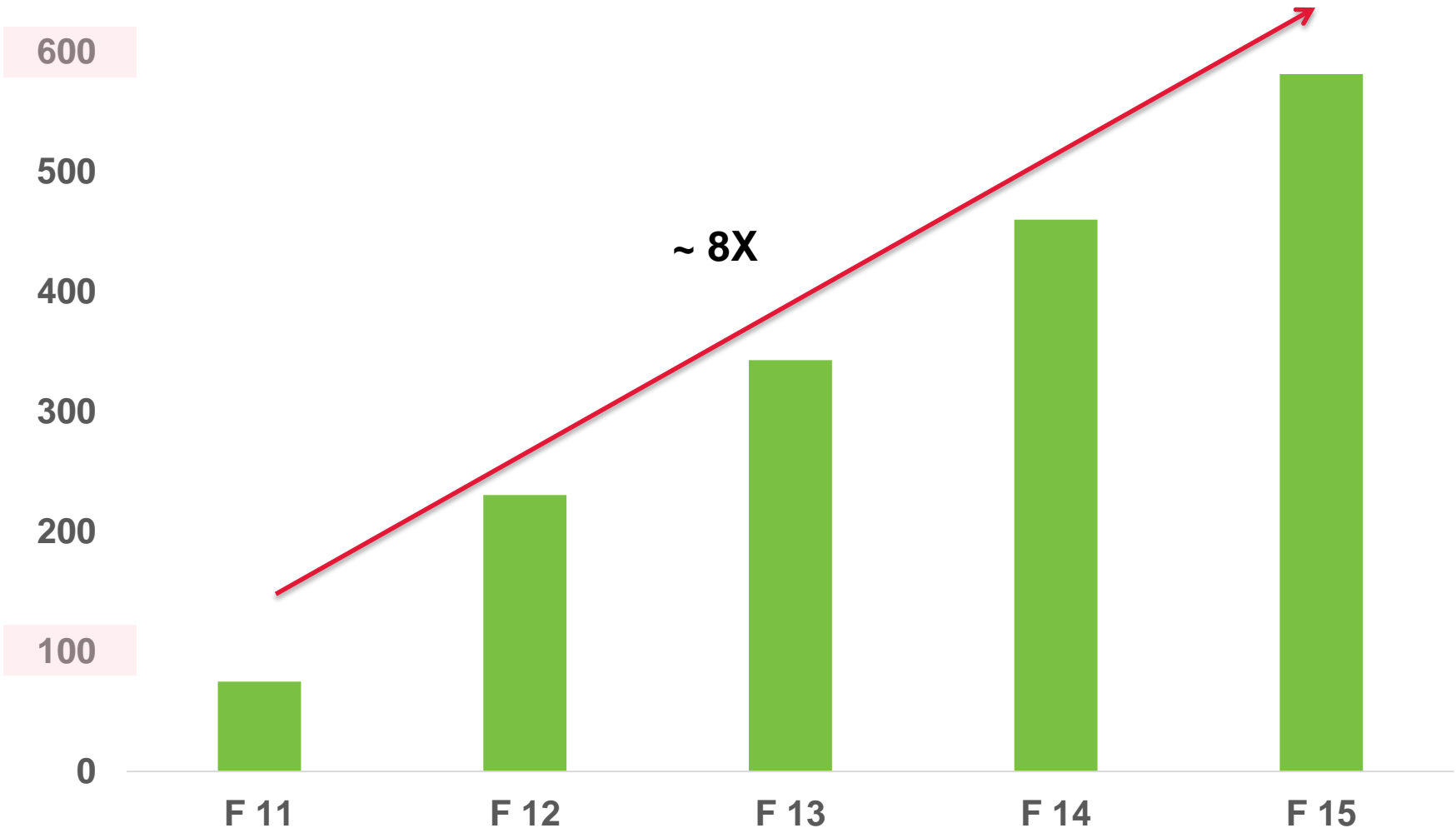
BHAG: Big Hairy Audacious Goal

Deliver FarmTech Prosperity

We will deliver *Farm Tech Prosperity* through a variety of existing and new agri initiatives to impact the lives of farmers enabling them to *RISE*



Agri Business Performance: Revenue



Thank you

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Mahindra
AGRI BUSINESS