

Mahindra Agri Business



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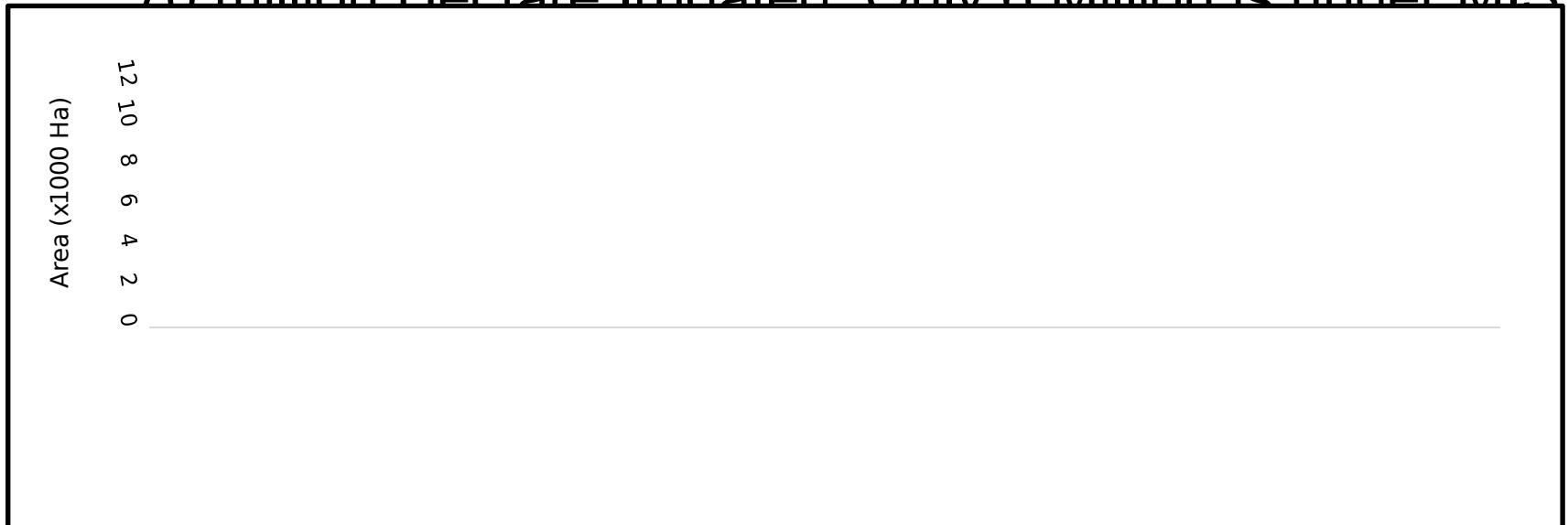
Micro Irrigation Industry

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%;

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

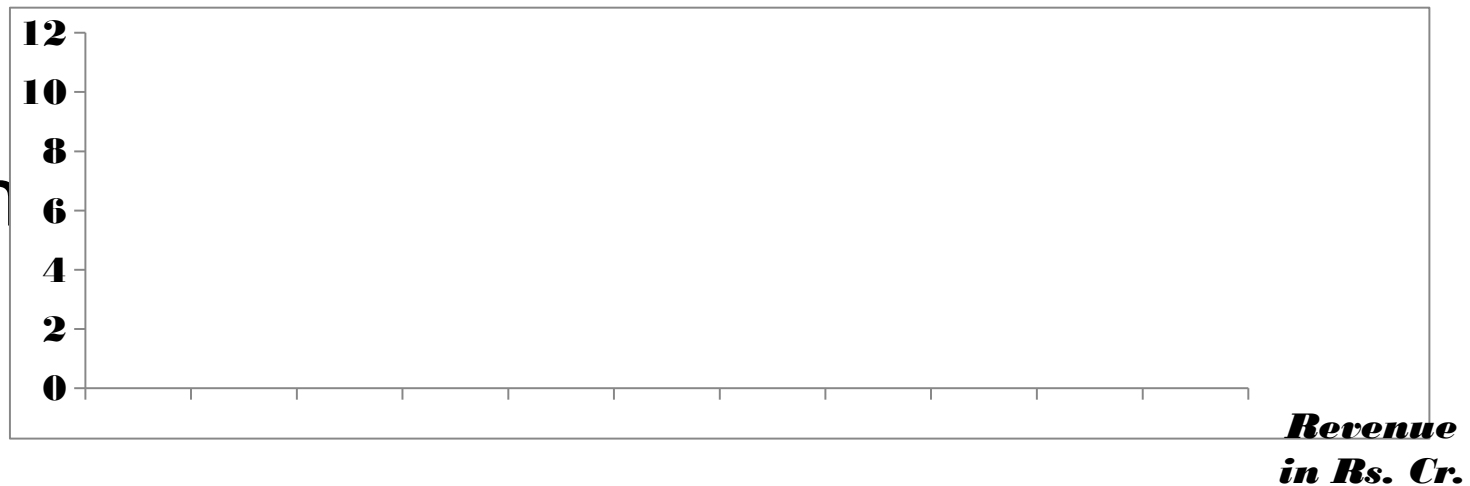
- Industry becoming more structured & streamlined
 - Gujarat & AP Project markets; use Tripartite agreements
 - Use of IT to streamline ‘application to subsidy disbursement’ cycle
- Bank support
 - Banks Financing MIS systems aggressively.
 - SBI, DENA, ICICI & IDBI initiators

EPC Industriè Ltd.

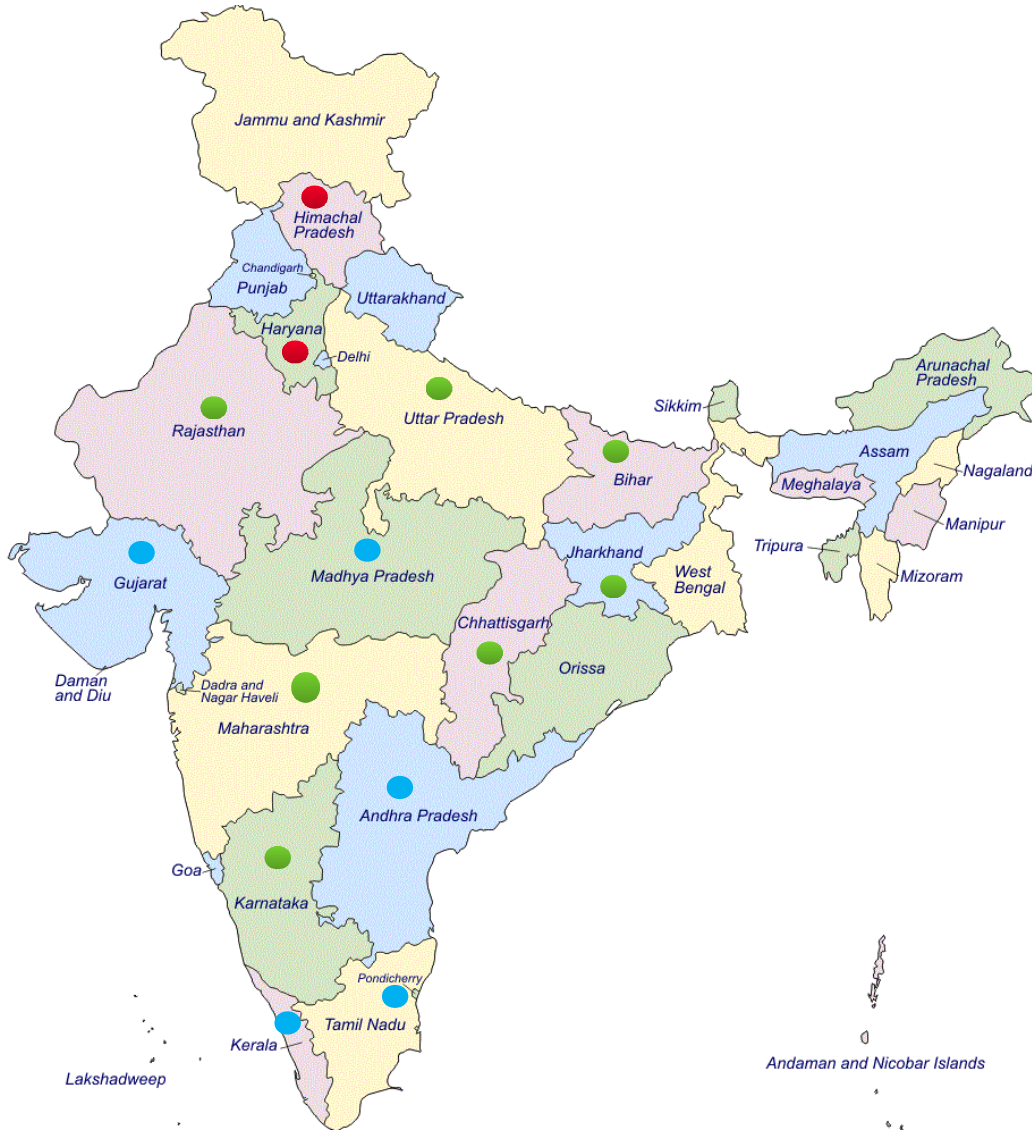
- Pioneered Micro-Irrigation Systems (MIS) in India in 1986
- Registered in 15 states under subsidy program in India

■ More region

■ M &



Strong All India Network



- Open Markets
- Project 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 roots



- **Sprinkler Irrigation:** Suitable for modern farming, provides uniform water distribution, and is suitable for quality, high yield and cost efficiency.



Product Differentiators

- 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

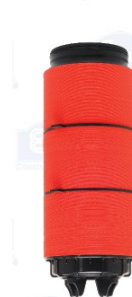


Product Portfolio: Drip Irrigation

■ Drip Fittings

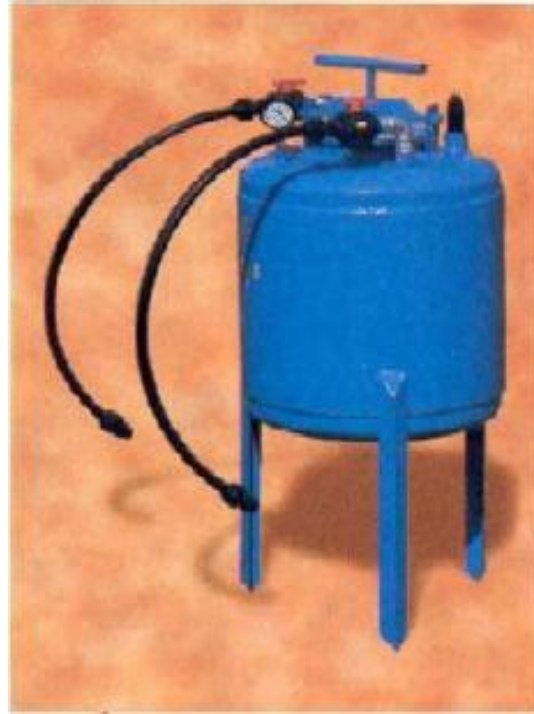


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Product Portfolio: Drip Irrigation

- Fertigation Equipment



Product Portfolio: Sprinkler Irrigation

- Sprinkler Irrigation pipe



- Pipe fitting



- Sprinkler Nozzle



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

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

Field Services



Agronomy training



Demo Plots



Consumer Engagement

Consumer Engagement



■ Farmers Training Program



■ Van Campaign



■ Rural Exhibition Participation



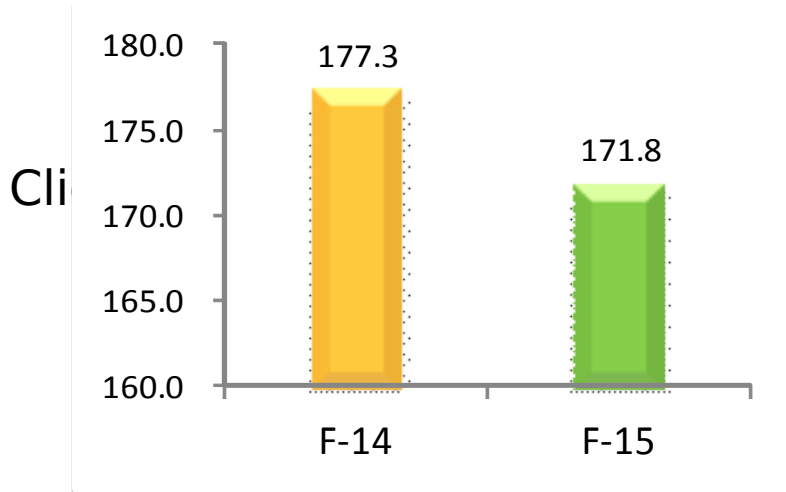
■ Demo Plot

Financial Performance F-15

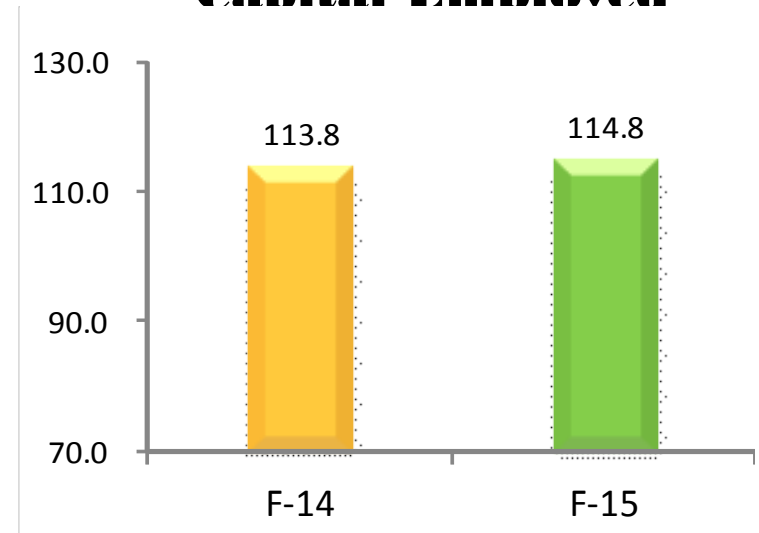
Performance at Glance F-15

Figures in Rs. Cr.

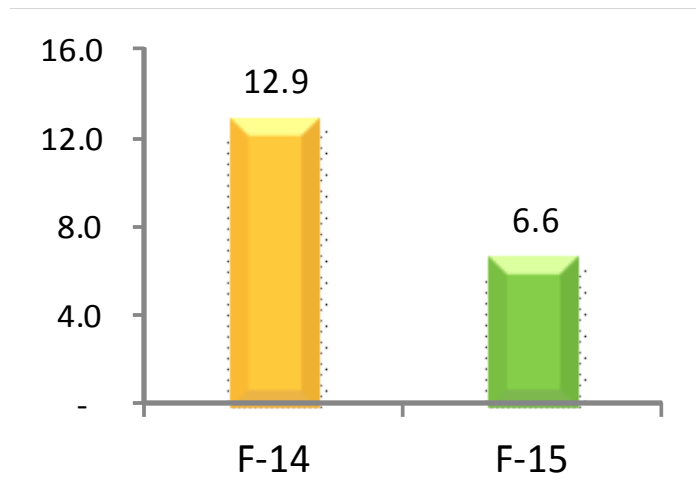
Revenue



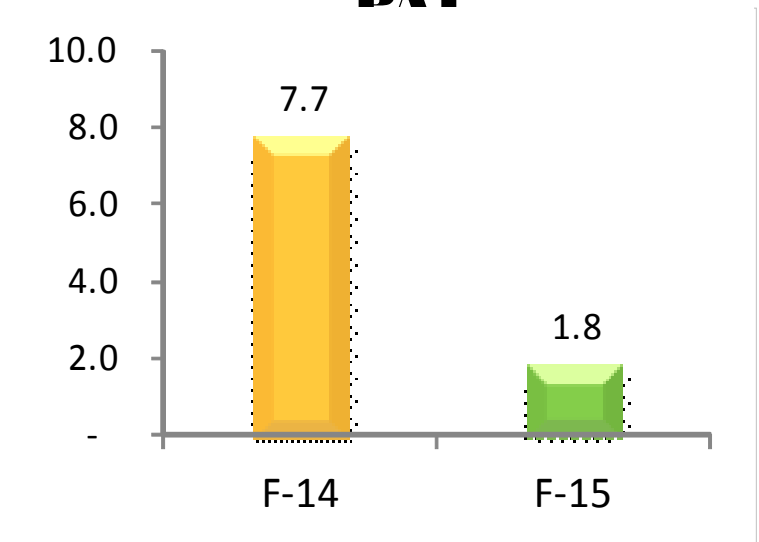
Capital Employed



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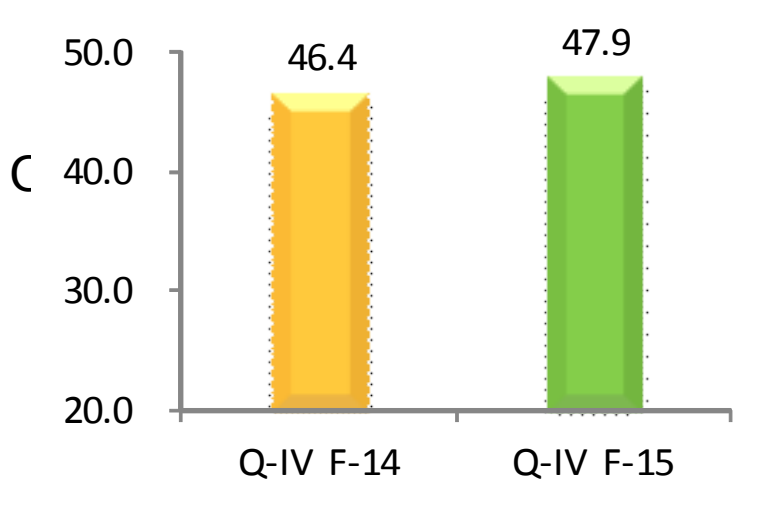


Financial Performance for Q-IV

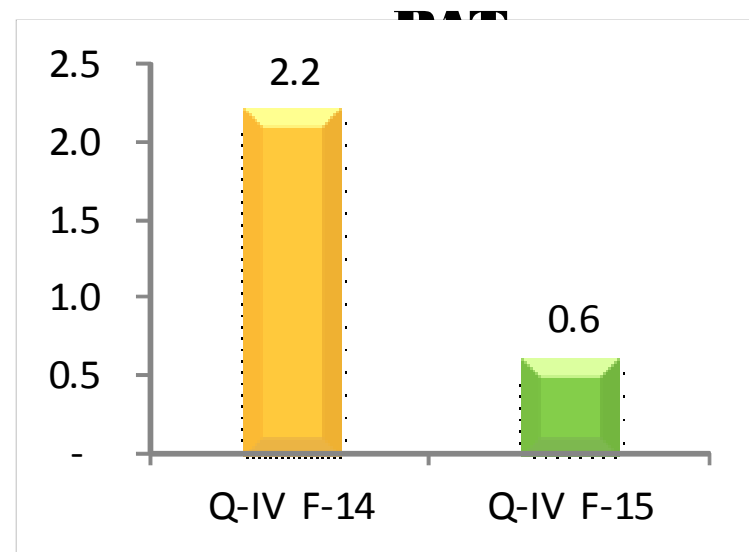
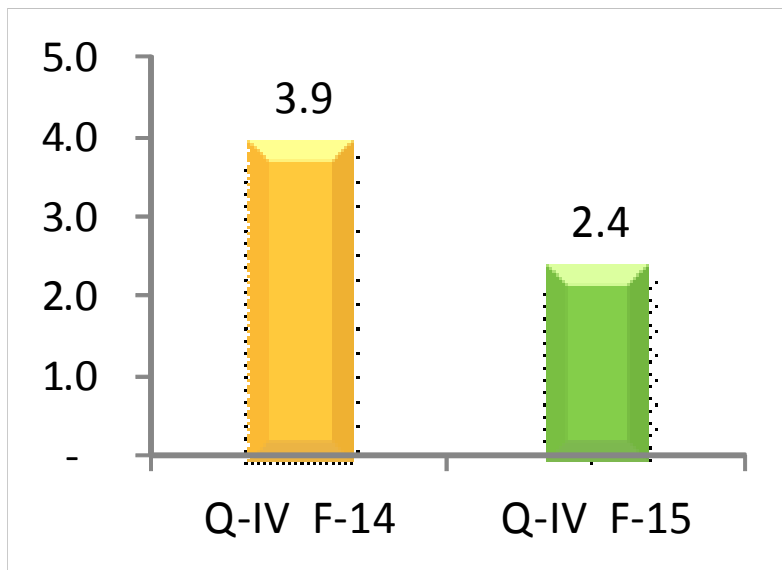
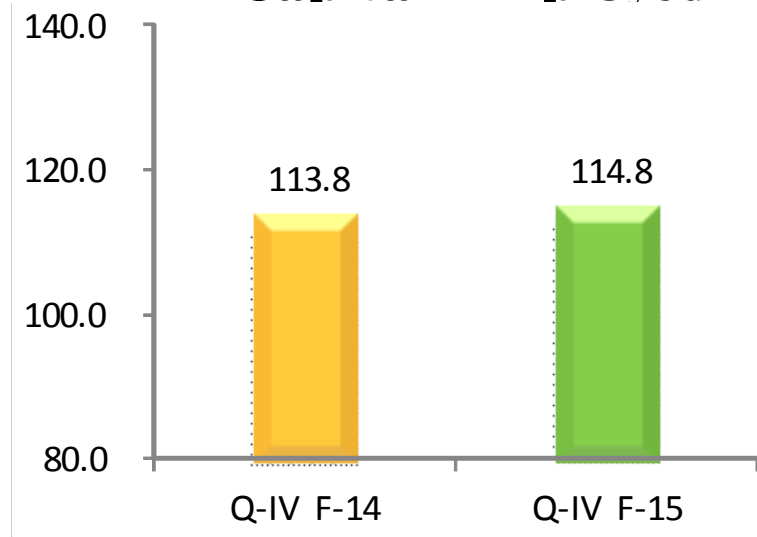
Performance at Glance Q-IV

Figures in Rs. Cr.

Revenue



Capital Employed



Industry Environment

- At the start of F '15, because of change from NMMI to NMSA there was lack of policy clarity across many states
- This led to considerable slowdown in business and industry dropped by around 20% in H1 over F '14



New Initiatives started

Customer Centricity: Enabling increased customer reach



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Samriddhi

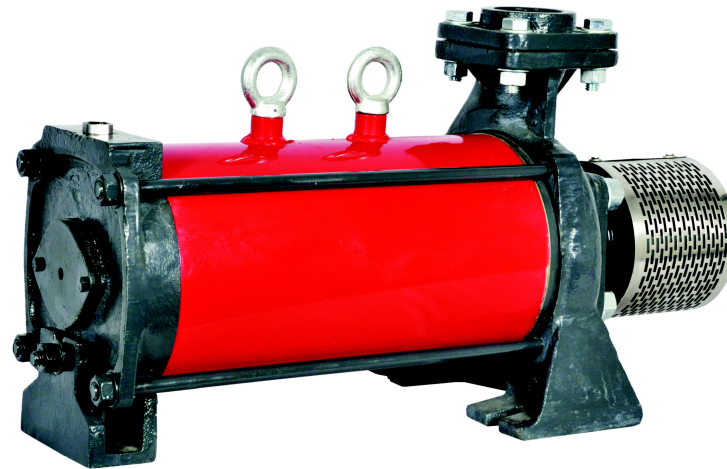
EPC A Mahindra Group Company

Agri Helpline

New Allied Businesses



Greenhouse



Pumps



Reducing Subsidy Dependence



Large Community



Landscaping



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

“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**



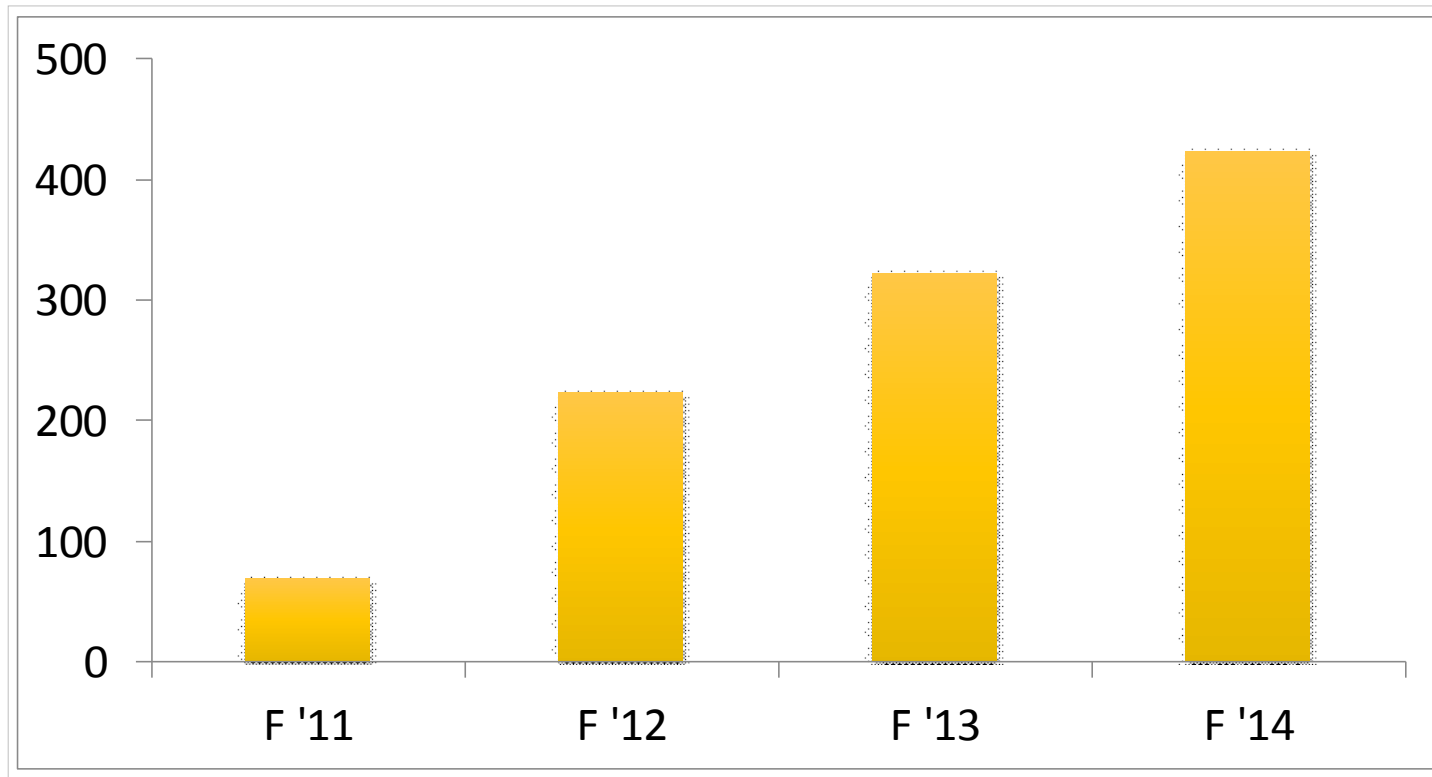
Mahindra Agri Business



BHAG: Big Hairy Audacious Goal

***Delivering
FarmTech Prosperity***

Agri Business Performance: Revenue



In Rs. Cr

Thank you

- “Investors don't invest in businesses, they invest in People.”

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