



A FORCE FOR GOOD



GROUP PRESENTATION



ADITYA BIRLA GROUP

LEGACY

THE GROUP

KEY FIGURES

ACQUISITIONS & MILESTONES

SECTORS

SUSTAINABILITY

PEOPLE

CSR



A LEGACY OF OVER 165 YEARS

The history of Aditya Birla Group is intertwined with that of India.

Mahatma Gandhi's concept of **TRUSTEESHIP** has guided our business-thinking and actions through generations.

G.D. Birla was a close confidant of Mahatma Gandhi and played a critical role in India's freedom struggle



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The values of Aditya Birla Group can be traced back to the inspiring ideals and vision of two legendary leaders, who established the foundation of the Group.

OUR HERITAGE

Mr. G D Birla
Founding father;
set up many of
pre-independent
India's critical
industries



Mr. Aditya Vikram Birla
Established the first
India-based multinational;
put India on the world map



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A Chartered Accountant and MBA from London Business School, Mr. Kumar Mangalam Birla, has successfully led Aditya Birla Group on an accelerated growth over the past 3 decades

OUR CHAIRMAN



Mr. Kumar Mangalam Birla

Chairman, Aditya Birla Group

Spearheaded over 60 successful acquisitions, mergers & JV's

Globally highest by an Indian conglomerate

Raised the Group's turnover by over 30 times



In 2023, he was conferred with the Padma Bhushan - one of India's highest civilian awards, becoming the 4th member of the family to receive this prestigious award.



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DRIVEN BY OUR PURPOSE. LED BY OUR VALUES

Passion



Seamlessness



Integrity



Commitment



Speed



OUR PURPOSE

TO ENRICH LIVES, BY BUILDING DYNAMIC AND RESPONSIBLE BUSINESSES AND INSTITUTIONS, THAT INSPIRE TRUST.



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A **US\$ 66*** billion conglomerate

Consolidated market cap of **US\$ 111 bn #**

Across **6** continents and **40+** countries

180+ state-of-the-art manufacturing units globally

187,000+ employees of over 100 nationalities

300M+ Loyal customer base

*FY24, excluding currency fluctuation

#As on 30th September 2024/ Q2'FY25 end



ADITYA BIRLA GROUP

Global PRESENCE





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Globally, Aditya Birla Group is...



#1
IN ALUMINIUM ROLLING



#1
RECYCLER OF ALUMINIUM



#2
IN CARBON BLACK
(based on installed production capacity)



#2
IN CELLULOSIC STAPLE FIBRES



#2
IN COPPER RODS
(EXCLUDING CHINA)



#3
IN CEMENT
(EXCLUDING CHINA)

In India,
the Group leads
across diverse sectors.

#1

IN GREY CEMENT
AND CONCRETE



#1

FASHION (BRANDED APPAREL)
AND LIFESTYLE PLAYER



#1

IN SPECIALTY
CHEMICALS



LARGEST CHLOR-
ALKALI PLAYER



#1

IN COPPER



ONE OF THE LARGEST
FINANCIAL SERVICES
PROVIDERS IN INDIA



Vi

INDIA'S LEADING
TELECOMMUNICATIONS
COMPANY



LEADERSHIP POSITION

ACROSS MANUFACTURING AND SERVICES BUSINESSES

Manufacturing Businesses



Service Sector Businesses



Market Capitalisation US\$ 111 bn



UltraTech
Cement
US\$ 40.6 bn



Grasim
Industries
US\$ 22.5 bn



Hindalco
Industries
US\$ 20.2 bn



Aditya Birla
Fashion & Retail
US\$ 4.4 bn



Aditya Birla
Capital
US\$ 7.4 bn



Vodafone –
Idea JV
US\$ 8.6 bn



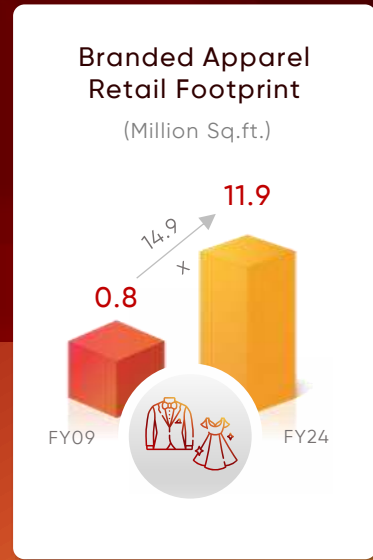
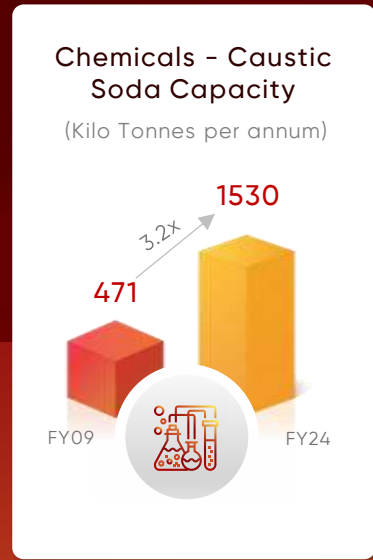
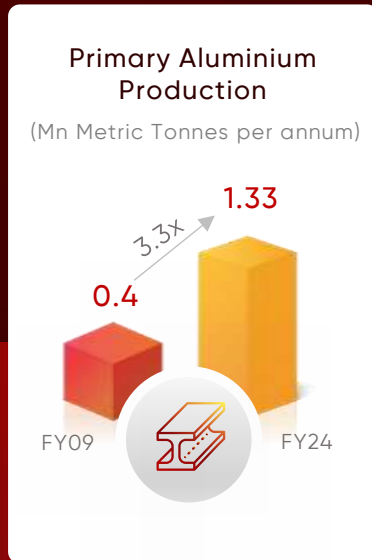
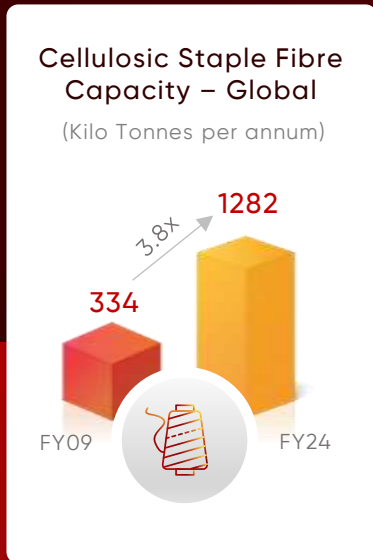
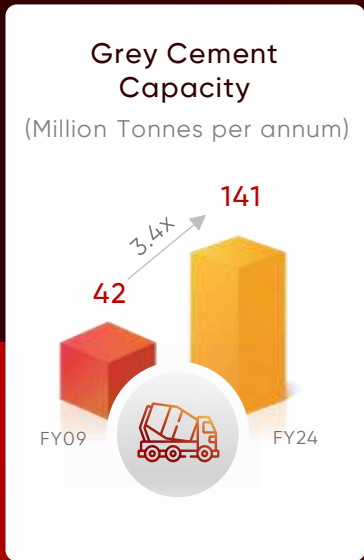
Aditya Birla
Real Estates
US\$ 3.1 bn



Aditya Birla
AMC
US\$ 2.4 bn



GROWTH ACROSS SECTORS



WE BUILT SIGNIFICANT SCALE ADVANTAGE



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KEY ACQUISITIONS

2007



Aluminium

Novelis
US\$ 6.1 bn.

2008



Telecom

Spice Communications
US\$ 1.8 bn.

2010



Cement

ETA Star
US\$ 375 mn.

2011



Pulp & Fibre

Domsjo Fiber
US\$ 370 mn.

2012



Branded Apparel

Pantaloon
US\$ 437 mn.



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KEY ACQUISITIONS

2014



Cement

Jaypee Cement
US\$ 634 mn.

2016



Cement

Jaiprakash Associates
US\$ 2.3 bn.

2018



Cement

Binani Cements
US\$ 1.1 bn.

2019



Cement

Century Cement
US\$ 1.2 bn.

2020



Metals

(Aluminium)
Aleris
US\$ 2.8 bn.



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KEY ACQUISITIONS

2021



Fashion

ABFRL acquires 51% stake in Sabyasachi Couture

2021



Metals

Hindalco acquires Polycab's 100% equity stake in Ryker

2022



Fashion

ABFRL acquired 51% stake in House of Masaba Lifestyle

2022



Fashion

TMRW acquired majority stake in Styleverse Lifestyle

2022



Dining

Aditya Birla New Age Hospitality (ABNAH) acquired 100% stake in KA Hospitality



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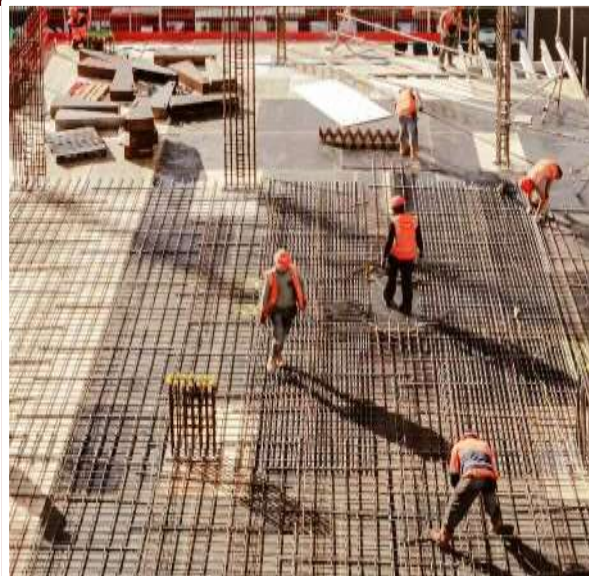
CSR

2024 MILESTONES



ADITYA BIRLA CAPITAL

Announces amalgamation of Aditya Birla Finance Ltd with itself



UltraTech

Upgrades consolidated production capacity for grey cement to 152.7 Million Tonnes Per Annum (MTPA)



VODAFONE IDEA (Vi)

Successfully launches India's largest (\$2.2bn) follow-on public offering (FPO)



INDRIYA

Launches the "New Age Jewellery" brand that transforms the jewellery experience for every Indian



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CORPORATE SOCIAL RESPONSIBILITY



ADITYA BIRLA GROUP

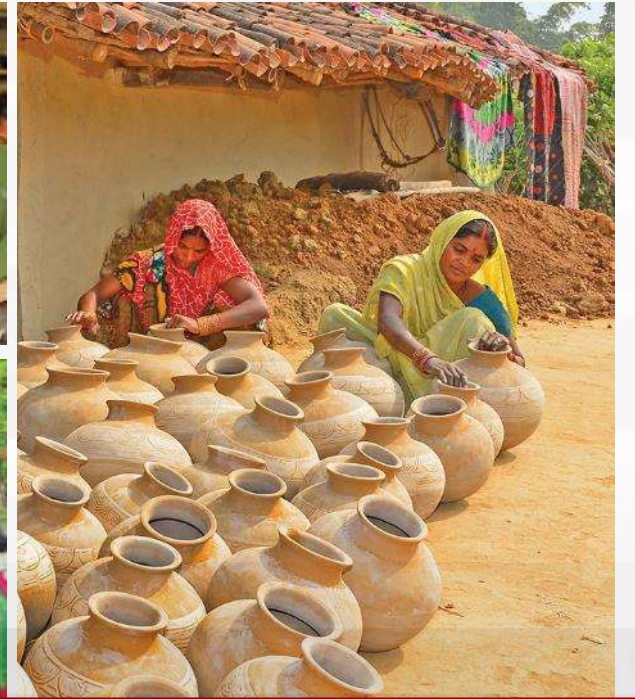
We reach
11 Million
people
across
9,000
villages



Our CSR Vision

To actively contribute to the social and economic development of the communities in which we operate and beyond. In sync with the UN SDGs our endeavour is to lift the burden of poverty weighing down the underserved and foster inclusive growth. In doing so, build a better, sustainable way of life for the weaker, marginalized sections of society and enrich lives. Be a force for good."

– Mrs. Rajashree Birla



MAKING A DIFFERENCE



100,000 people trained in skill sets under its sustainable livelihood initiatives



Over 100 Million polio vaccinations



5,000 self-help groups empowering over 45,000 women



Vaccinated 30,000 girls with HPV Vaccines to safeguard from cervical cancer



Over 300 model villages in rural India



Reach out to over 100,000 students through our network of formal and non-formal education institutions



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CEMENT



CARBON
BLACK



CELLULOSIC
FIBRE & TEXTILES



CHEMICALS



DIGITAL
PLATFORMS



DINING &
EXPERIENCES



ENTERTAINMENT



FASHION



FINANCIAL
SERVICES



JEWELLERY



METALS



MINING



PAINTS



PULP & PAPER



REAL ESTATE



RENEWABLES



TECHNICAL
TEXTILES



TELECOM



TRADING



VENTURE
CAPITAL

DIVERSIFIED INTERESTS

Click on each icon to learn more



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CEMENT





ADITYA BIRLA GROUP



CEMENT

UltraTech is a USD 8.4 billion building solutions powerhouse. It is the largest manufacturer of grey cement and ready-mix concrete (RMC) in India.



World's 3rd largest cement producer (excluding China)

UltraTech is India's No. 1 Cement.* ~25% of India's market share (by capacity)



Only cement company with 100+ MTPA capacity in a single country (excluding China)

One of the leading producers of white cement in India

Enroute 200 MTPA capacity by FY2027



Operations in four countries - India, UAE, Bahrain, and Sri Lanka

First company in India, and the second company in Asia, to issue dollar-based sustainability-linked bonds



*IN SALES VOLUME Q4FY24





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CARBON BLACK





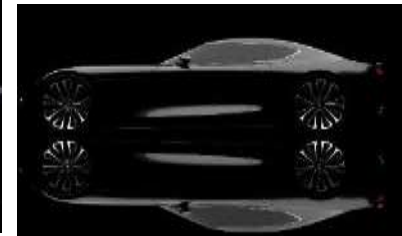
ADITYA BIRLA GROUP



BIRLA CARBON

CARBON BLACK

BIRLA CARBON is one of the largest global manufacturers and suppliers of high-quality carbon black additives with an annual production capacity of over 2 million tonnes



Birla Carbon has been at the forefront of the carbon black industry for over 160 years



Current footprint extends across 13 countries across 5 continents with 17 manufacturing facilities, 8 offices and 3 technology centres



Entered the energy systems market as a key player in conductive carbon blacks for Lithium-ion and Lead-Acid batteries



Key industries for carbon black: tires, rubber, plastics, coatings, inks, toners, adhesives, sealants, textile fibres, wire and cables etc.

KEY BRANDS: Raven, Conductex and Continua™





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CELLULOSIC FIBRE





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DOMESTIC TEXTILES, ACRYLIC FIBRE & OVERSEAS SPINNING

CELLULOSIC FIBRE

Aditya Birla Group has multiple businesses in Cellulosic Fibre segment



No. 1 linen yarn, linen fabric, and wool (worsted yarn) producers in India



6% share of Cellulosic Fibres in the global fibre basket; huge growth opportunity due to cotton constraints



11 manufacturing facilities across 7 countries

Technical Textiles acquisitions in Europe – SPL and PyroTex





ADITYA BIRLA GROUP



FASHION YARN

CELLULOSIC FIBRE

Aditya Birla Group has multiple businesses in Cellulosic Fibre segment



Globally, 3rd largest Viscose Filament Yarn (VFY) player.

India's largest VFY producer



India's exclusive producer of VFY manufactured by unique Spool Spun Yarn technology



Only company equipped with all three VFY manufacturing technologies



VFY creates premium fashion yarn for apparel, embroidery and home textiles





ADITYA BIRLA GROUP



Birla Cellulose
Fibres from nature

BIRLA CELLULOSE

CELLULOSIC FIBRE

Aditya Birla Group has multiple businesses in Cellulosic Fibre segment



India's largest viscose producer



100% natural, manmade & biodegradable fibres having 360-degree sustainable green goals



Major brands: Liva, Liva Eco, Liva Reviva, Birla Viscose, Birla Modal, Birla Excel, Liva Navyasa



Over 80 million Liva tagged garments sold annually





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CHEMICALS



ADITYA BIRLA GROUP



CHEMICALS

ADITYA BIRLA CHEMICALS

Is a global chemicals player with a diversified portfolio and leadership positions across businesses.



Chlor-Alkali: One of the largest Indian players, and among the top global manufacturers



Advanced Materials: Largest Indian player in epoxy polymers and curing agents with global manufacturing footprint. Presence in India, Thailand and Germany



Sulphites: Among world's leading producers, offering advanced and sustainable solutions





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DIGITAL PLATFORMS





ADITYA BIRLA GROUP



DIGITAL PLATFORMS

Birla Pivot helps MSMEs unlock their potential and aims to become a one-stop destination for all procurement needs of building solutions industry.



The platform offers over 40,000 SKUs from over 300+ Indian and International brands at competitive prices with ease of access to finance and a smooth delivery experience



Categories include steel, cement, tiles & surfaces, ply & laminates, doors, windows, sanitary & bath fitting, among others



Crossed milestone of INR 1 billion revenue in the first year of operations





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DINING & EXPERIENCES





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DINING & EXPERIENCES

ADITYA BIRLA
NEW AGE HOSPITALITY

Is building the most preferred house of F&B brands in India



Aditya Birla New Age Hospitality (ABNAH) currently operates Jolie's, an exclusive members-only luxury club in Mumbai.



ABNAH acquired a 100% stake in KA Hospitality, adding four iconic restaurant brands – Hakkasan, Yauatcha, Nara Thai and CinCin – to its growing portfolio.



Collaborated with renowned chef Rahul Akerkar to launch, ODE, a chain of premium casual dining restaurants across India.

Launched Waarsa, a premium casual dining restaurant serving signature Awadhi food.





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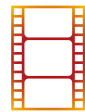
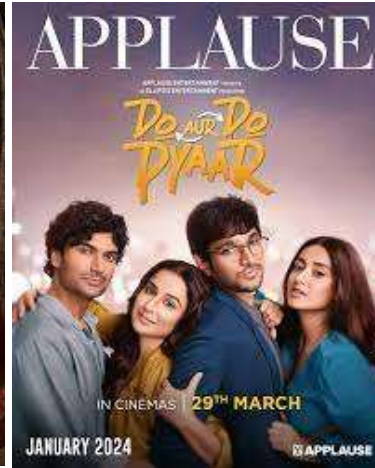
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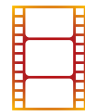
ENTERTAINMENT

APPLAUSE ENTERTAINMENT

is a first-of-its-kind content and IP creation studio operating on a 'hub & spoke' model



Established in 2017, Applause Entertainment invests upfront in content creation, collaborates with creators and partners with varied platforms to take the content to consumers across the globe



Some of its most celebrated and awarded OTT series in India includes titles such as Criminal Justice, City of Dreams, Hostages, The Office, Scam 1992: The Harshad Mehta Story, among others



Honoured with Dadasaheb Phalke Awards (2021) for its series Scam 1992: The Harshad Mehta Story. Awarded 'Digital Content Start-up of the Year' at the Talent Track Awards, 'Best Content Studio' at the SCREENXX Awards and 'Excellence Award for Content Studio' at the E4M Play Awards





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FASHION





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FASHION

ADITYA BIRLA FASHION AND RETAIL

is India's first billion-dollar pure-play fashion powerhouse with an elegant bouquet of leading fashion brands.



US\$ 1.7 billion fashion powerhouse

International business portfolio includes multi-brand retail formats and some of the most premium global brands



ABFRL's retail space spans over 12 million sq.ft.

A strong network of 4,538 stores, 37,952 multi-brand outlets across India



Ranked as Asia's most sustainable fashion retail company by S&P Global CSA





ADITYA BIRLA GROUP



AMERICAN EAGLE

FOREVER 21

THE COLLECTIVE



TED BAKER
LONDON



RALPH LAUREN



STYLE UP

marigold™
LANE

PANTALOONS
PLAY WITH FASHION



JAY PORE®

masaba

LOVECHILD
masaba

TARUN TAHILIANI

VAN HEUSEN
INNERWEAR

Tmrw

TASVA

KEY BRANDS





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FINANCIAL SERVICES



ADITYA BIRLA GROUP



FINANCIAL SERVICES

ADITYA BIRLA CAPITAL

is a financial solutions group that caters to the diverse needs of its customers across their life cycle



Among the top 5 private NBFCs in India.

AUM of INR 5 Lakh crore (~\$59 bn) and Consolidated Lending book of INR 1.38 Lakh crore (\$16 bn)



Largest Non-Bank AMC in India^.

Fastest growing standalone health insurer in India



Udyog Plus, Aditya Birla Capital's B2B platform for MSMEs crossed AUM of USD 344 million



PAN India presence with 1,470 branches and 2,00,000+ agents / channel partners and several bank partners

*AUM OF NBFC, HFC, AMC, LIFE AND HEALTH INSURANCE (FY24). CONVERSION: 1 USD = 84.29 INR





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JEWELLERY





ADITYA BIRLA GROUP



JEWELLERY

The Group's retail jewellery brand, Indriya, aims to transform the jewellery buying experience for every Indian through an extensive range of designs for all occasions.



Aditya Birla Group forayed into branded jewellery retail business with initial investment of \$600mn



Indriya offers over 5000 exclusive designs and 500 modular jewellery pieces, adaptable for various occasions.



Present across Delhi, Mumbai, Pune, Ahmedabad, Jaipur and Indore.

Plans to open 100 stores across India.





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METALS





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METALS

ALUMINIUM

A \$26 billion metals powerhouse, **HINDALCO** is the metals flagship of the Group with Novelis and Birla Copper as its key subsidiaries.



World's largest aluminium company by revenue, and among the leading producers of primary aluminium in Asia

\$10 bn planned capex for future growth opportunities



Operates across the value chain, from bauxite mining, alumina refining, coal mining, captive power plants and aluminum smelting to downstream rolling, extrusions, and foils



Hindalco's global footprint spans 52 manufacturing units across 10 countries

World's most sustainable aluminium company in the Dow Jones Sustainability Indices (DJSI) for five consecutive years





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METALS

ALUMINIUM

NOVELIS is a leading sustainable aluminum solutions provider and a world leader in aluminum rolling and recycling.



World's No. 1 Aluminium rolling and recycling company



Novelis is the world's largest supplier of aluminum sheet to automotive industry, & leading supplier of rolled aluminium products to the aerospace industry



Globally, 1 in 3 cans are recycled by Novelis. Recycles more than 84 billion cans a year





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METALS

COPPER

BIRLA COPPER is one of the leading producers of copper in India



No. 2 in copper rods, globally (excluding China)



One of the world's largest single-location copper smelters in the world



Leading producer of copper cathodes and continuous cast copper rods



One of the major manufacturers of 19.6mm diameter copper rods, which is used for railway electrification





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MINING





ADITYA BIRLA GROUP



MINING

ESSEL MINING & INDUSTRIES LIMITED (EMIL)

is a diversified natural resource company operating in the sectors of coal mining, iron pellets, Noble Ferro Alloys (NFA) and contract coal mining through its mining services



~75 years of rich legacy serving India's growing energy and infrastructure needs

Operates world's first plant using Circular Pelletisation process for iron ore



Leading integrated mining services provider with over 50 MTPA coal capacity

Forayed into commercial coal mining



Leading Supplier of high-quality Noble Ferro Alloys in India – extracted from waste sludge – which is used in steel

Presence in 6 States – Odisha, Gujarat, Maharashtra, Jharkhand, Madhya Pradesh, and Chhattisgarh





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PAINTS





ADITYA BIRLA GROUP

PAINTS

BIRLA OPUS

Aspirational player in India, with ambition to achieve ₹10,000 Cr. revenue and breakeven by FY28



Birla Opus is India's second largest player in decorative paints by installed capacity

Capacity of 1,332 MLPA with backward integration; greater than combined current capacity of existing 2nd, 3rd and 4th largest players in India



Committed \$1.2 billion investment to set up six state-of-the-art manufacturing facilities and an efficient pan-India distribution network

Aims to break even in the next three years



Offering a diverse spectrum of 2300+ tintable colour choices and 216 iconic Indian colours

Products available across 4,300+ towns of India and expanding rapidly





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PULP & PAPER





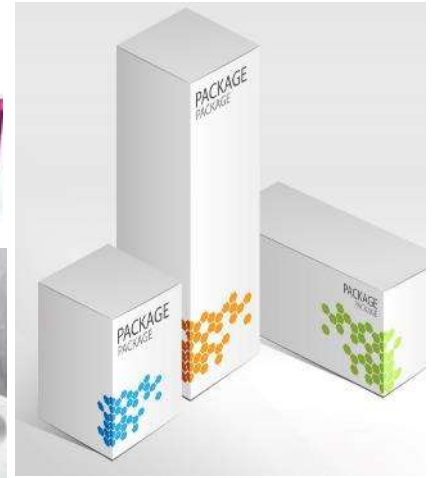
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PULP & PAPER

Aditya Birla Group is a leading player in the Indian pulp and paper industry.



CENTURY PULP AND PAPER



The leading manufacturer of writing & printing paper, including MICR Cheque, Overlay Tissue, Maplitho and Copier, as well as virgin fibre-grade soft tissue including Facial Napkin, Kitchen, Toilet and Carrier tissue.



Leading manufacturer of Multilayer Packaging Board, supplying Folding Box Board (FBB), Solid Bleached Sulfate (SBS), and Cup Stock grades.



Manufacturing capacity of 4.81 lakhs MT per annum across units at Lalkua, Baddi, Sonipat, Bharuch and Hyderabad





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REAL ESTATE



ADITYA BIRLA GROUP



BIRLA ESTATES

REAL ESTATE

ADITYA BIRLA REAL ESTATE through its entity Birla Estates is a premium player in the residential and commercial real estate segment.



GDV of ~\$6.5Bn.
Representing ~30 mn sq.ft.

~\$5.4mn of area sold since FY20 till Q1'FY2



Focus on 4 key markets – MMR, Bengaluru, NCR & Pune Launched 6 residential projects



Among the Top 5, Birla Estates aspires to be a leading real estate player over the next 5 years





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A large background image showing a worker in silhouette on a roof covered with solar panels. The scene is set during dusk or dawn, with a soft glow on the horizon. The solar panels are arranged in a grid pattern, and the worker is positioned in the upper middle part of the frame, looking towards the left.

RENEWABLES



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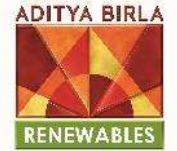
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RENEWABLES

ADITYA BIRLA RENEWABLES' areas of expertise spans across Solar, Wind + Solar, Floating Solar, and Battery Storage



Launched in 2011, Aditya Birla Group's energy transition platform – ABReL has a pan-India 744 MWp portfolio (Operating + Secured) with a high quality, diversified offtake base across 10 states



ABReL has strong visibility of a value accretive growth pipeline on the back of identified Aditya Birla Group's captive green power requirement over the next 7 years





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TECHINICAL TEXTILES



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CENTURY ENKA

TECHNICAL TEXTILES

Aditya Birla Group has a strong presence in the technical textiles sector.



One of the largest producers of Nylon Filament Yarn (NFY) and Nylon Tyre Cord Fabric (NTCF) in India



Producers of a wide range of high-quality Nylon Yarns used for varied applications including fish twines, conveyor belts, sports and active wear, sarees, intimate and foundation wear, etc.



Makers of customised NTCF for reinforcement of tyres which are used in motorcycles, scooters, light commercial vehicles (LCVs), medium & heavy commercial vehicles (MHCVs) farm and off the road (OTR) vehicles



Two state-of-the-art manufacturing facilities located in Pune (Maharashtra) and Bharuch (Gujarat), with a capacity of ~86,000 MTPA





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TELECOM





ADITYA BIRLA GROUP



TELECOM

Vi (VODAFONE IDEA LIMITED)

An Aditya Birla Group and Vodafone Group partnership, Vi is India's leading telecom service provider



3+ decades of operations backed by strong brand recall and management with global expertise



Trusted by ~210 million* Indian customers

#3 player in one of the largest global telecom markets



183k+ unique tower locations, ~430k broadband units, 299k Km Optical Fibre Cable



Successfully launched India's largest (\$2.2bn) follow-on public offering (FPO); oversubscribed ~7x





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TRADING





ADITYA BIRLA GROUP



TRADING

ADITYA BIRLA GLOBAL TRADING

One of the most diversified commodities traders in the world, handling 30+ different commodities across agri products, agri-inputs, energy and metals



Annual Revenue of
US\$ 5.6 bn

Present in 18 Countries
across 5 Continents



Trading over 35 MMT of
supplies (annually) from
70+ sourcing countries



Largest international
sulphur traders and the
largest lifter of South African
coal for various markets





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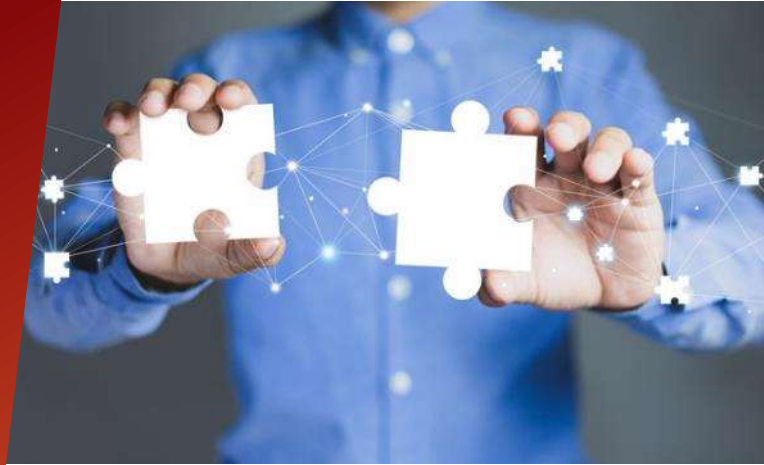
VENTURE CAPITAL





ADITYA BIRLA GROUP

ADITYA BIRLA
VENTURES



VENTURE CAPITAL

ADITYA BIRLA VENTURES

The Group's Venture Capital arm



ABV invests across a diverse range of sectors - from consumer tech to fintech, B2B commerce to healthtech, SaaS to space tech.



By leveraging Group's 165+ years of experience in building industry-leading businesses, ABV mentors and support entrepreneurs from an early stage



Some notable investments:

- Dukaan: e-commerce solution provider
- Finbox: digital credit infrastructure company
- Eka Care: health-tech provider
- Giva: fine silver jewellery brand
- Digyantra: Space situational awareness solution provider
- Mokobara: Travel lifestyle brand





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Sustain-Ability



At Aditya Birla Group, we aim to mitigate operational environmental risks by undertaking projects on energy conservation, becoming energy efficient, and changing our fuel mix through use of renewables and waste heat recovery.



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Sustain-ability

Aditya Birla Group is committed to achieving Net-Zero Carbon Emissions by 2050



Hindalco achieved the Top 1% S&P Global ESG score in the Aluminium industry



UltraTech's ranked 6th in the Global Sectoral ranking of the S&P Global Dow Jones Sustainability World Index (DJSI)



ABFRL ranks 8th globally in the textiles, apparel and luxury goods industry as per S&P Global Corporate Sustainability Assessment



Birla Carbon achieved 'Platinum' rating by EcoVadis for sustainable business practices in 2023



World's largest aluminium recycler. Recycles 84 billion beverage cans every year.



Birla Cellulose is the first global viscose producer to receive a Dark Green Shirt ranking



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Decarbonisation



Climate Change Adaptation



Biodiversity Management



Water Resilience



Circularity

S



Employee & Contractor Safety; Occupational Health



Human Rights, Diversity & Inclusion



Supply Chain - responsible procurement with partners



Talent Management



Empowering Communities

G



Transparent Reporting



Corporate Governance



Strategic Stakeholder Engagement



Products and services



Use of digitalisation

MATERIAL AREAS

Other key group-wide commitments include zero harm approach (no fatalities), higher % of sustainable/ responsible products, use of latest global frameworks, talent management amongst others



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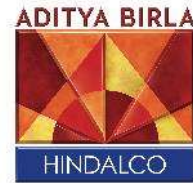
KEY ESG TARGETS



- VSF business: target of net zero carbon emission by 2040
- Achieve Net Zero GHG Emissions at Grasim level by 2050
- Adoption of EU BAT for all VSF manufacturing sites by 2025



- Zero net carbon & net loss of Bio-diversity by 2050
- 5 times water positive by 2024
- 100% of electricity requirement from Renewable Energy by 2050



- Carbon neutral & Water positive by 2050
- No net loss in bio-diversity by 2050
- Zero waste to landfill by 2050



- 50% renewable energy across facilities by 2025
- Critical Tier-1 & Tier-2 suppliers to be assessed by 2025
- Sustainability 2.0 : from 'Process-led to Product-led'



- Reduction in 50% freshwater consumption by 2030 (from FY19)
- Target to assess 100% of critical suppliers in ESG criteria by 2023 (Pulp & Paper)
- Real Estate projects : zero discharge target



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OUR PEOPLE



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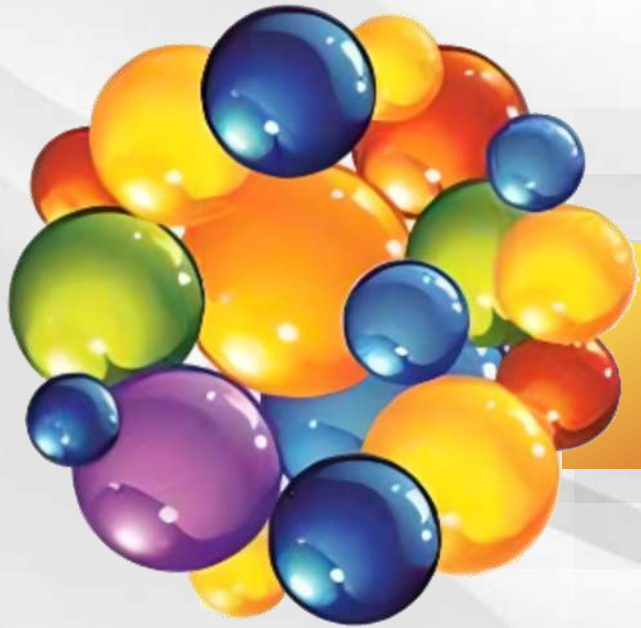
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A WORLD OF OPPORTUNITIES



Featured in the Top Companies to work for in India by LinkedIn for three consecutive years: 2020, 2021, 2022

Over **187,000** employees across **100** nationalities



We are Among India's top employers in manufacturing in the Forbes World's Best Employers 2022



Among AmbitionBox's Best Places to Work in India 2022



ADITYA BIRLA GROUP



THANK YOU