



Jain Irrigation Systems Ltd.

Small Ideas. Big Revolutions.®

Regd. Office: Jain Plastic Park, P.O.Box: 72, N.H.No. 6, Jalgaon – 425 001. India.

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CIN: L29120MH1986PLC042028

JISL/SEC/2024/07/B-2/B-6

31st July, 2024

To,
BSE Ltd.,
Corporate Relationship Department,
1st Floor, New Trading Wing, Rotunda Building,
P. J. Tower, Dalal Street,
Mumbai - 400 001.
Fax No.022– 22723121/22722037(Day)
022-22721072 (Night)
Email: corp.relations@bseindia.com

To,
National Stock Exchange of India Ltd.,
Exchange Plaza, C-1, Block G,
Bandra Kurla Complex,
Bandra (East),
Mumbai - 400 051.
Fax No. : 022-26598237/38
Email : cc@nse.co.in

**Ref: Code No. 500219 (BSE) & JISLJALEQS (NSE) for Ordinary Equity Shares
Code No. 570004 (BSE) & JISLDVREQS (NSE) for DVR Equity Shares**

Sub: Investor Communication Q1 FY25

Dear Sir/Madam,

Attached is the Investor Communication issued by the Company after the Board Meeting held on 31st July, 2024 for your record and reference.

Please receive the above in order and acknowledge.

Thanking you,

Yours faithfully,
For Jain Irrigation Systems Ltd.

A. V. Ghodgaonkar
Company Secretary

Investor Presentation Q1FY25

31 July 2024



“Leave this world
better than you found it”

Shri. Bhavarlal H. Jain (1937-2016) 1

Founder

About the Company

Jain Irrigation Systems Ltd (JISL), with its Corporate Mission "Leave this world better than you found it" is a diversified entity with turnover of close to US\$750 million. JISL has done pioneering work in water-management through Micro Irrigation in India. We have successfully introduced some hi-tech concepts to Indian agriculture such as 'Integrated System Approach', One-Stop-Shop for Farmer, 'Infrastructure Status to Micro Irrigation & Farm as Industry. Jain Irrigation is a worlds largest tissue culture company in Banana plantations with more than 140 million plants annually. We have a global presence with 19 manufacturing bases spread over four continents. Our products are supplied to 126+ countries with able assistance from 4,000+ dealers and distributors worldwide. We have reached to over 10 million farmers.



Jain Irrigation Systems Ltd.

Small Ideas. Big Revolutions.®

₹61.5Bn

Consolidated Revenues
31st March, 2024

₹7.9Bn

Consolidated EBITDA#
31st March, 2024

9,000+

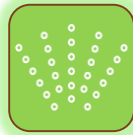
Associates Globally

Consistent with our discussion during the last earnings call, EBITDA numbers are presented as per market practice. Previous figures have been realigned accordingly.

Touching lives in more than one way



**DRIP
IRRIGATION**



**SPRINKLER
IRRIGATION**



**PRECISION
FARMING**



**TISSUE
CULTURE**



**RESOURCE
TO ROOT**



**PVC PIPES &
FITTINGS**



**PE PIPE &
FITTINGS**



**PLUMBING
SYSTEMS**



**DRINKING
WATER SOLUTION**



**PLASTIC
SHEETS**



**FRUIT
PROCESSING**



**SPICES
PROCESSING**



**DEHYDRATED
PRODUCTS**



**IQF
PRODUCTS**



**RENEWABLE
ENERGY**

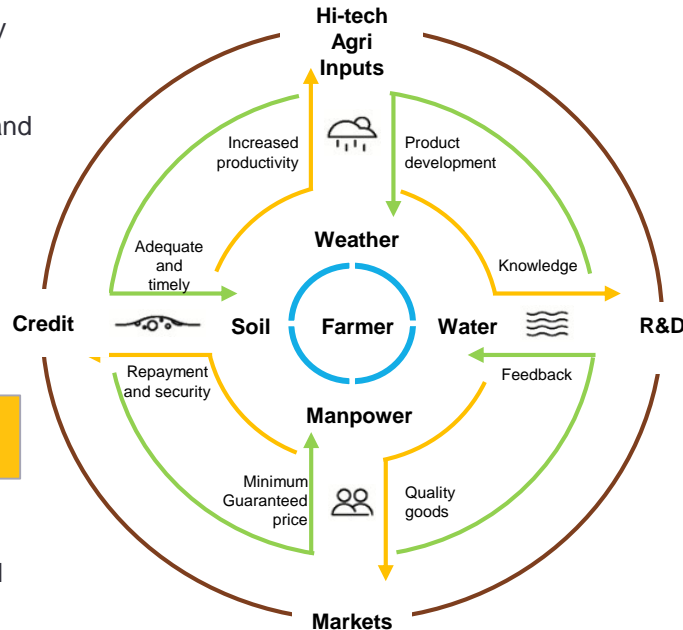
Unique, Well Diversified, Fully Integrated Agri Value Chain Business

Hi-Tech Agri

- ▶ Drip & Sprinkler Systems, Precision Farming Advisory including green & poly houses
- ▶ Large Tissue Culture plant capacity for Banana, Pomegranate, Sweet Orange and others
- ▶ Wide distribution presence – over 4,000 dealers / distributors
- ▶ World class manufacturing facilities
- ▶ Solution based approach
- ▶ Strong in-house R&D base

Agro Processing

- ▶ Fruit pulps, concentrates, vegetable dehydrations, spice processing, etc.
- ▶ Global leaders in Mango processing and Onion dehydration
- ▶ Catering to top global food companies
- ▶ Manufacturing in India, UK, USA and Turkey



Plastic

- ▶ PVC Pipes, fittings, Polyethylene Pipes Turnkey Projects, PVC Sheets
- ▶ Catering to Agricultural, Industrial & Infrastructural customer base
- ▶ Manufacturing primarily in India
- ▶ Forayed into urban markets by introducing plumbing systems
- ▶ Plastic Sheet manufacturing business in USA & UK to serve local customers

Others

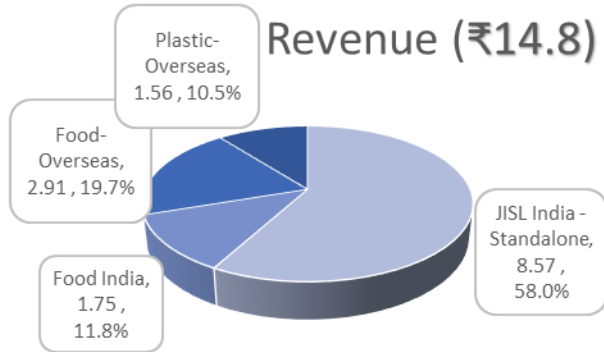
- ▶ Solar Thermal Products, Solar Photovoltaic Grid & Off-Grid Products
- ▶ Solar Power generation investments to reduce cost of power
- ▶ Agri R&D activities

Business Overview and product portfolio (1QFY25)

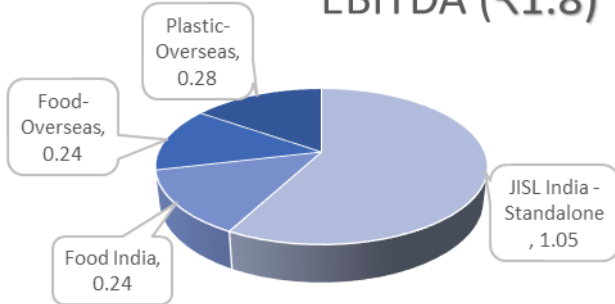
All fig. in ₹ bn

Consolidated

Revenue (₹14.8)



EBITDA (₹1.8)



JISL-India Standalone

Hi-tech Agri Input Products : *Micro Irrigation Systems, Tissue Culture Plants, Solar Agri Pump & Integrated Irrigation Projects.*

Plastic Products: *PVC Piping Products, PE Piping Products, Piping Projects, Plastic Sheets*

Others: *Solar Thermal Products, Solar Photovoltaic System, Solar Power Pack, Agri R&D Activities*

JFFFL-India Standalone

Fruits Processing
Onion and Vegetables dehydration Products
Spices Processing
Bio Gas

Food - Overseas

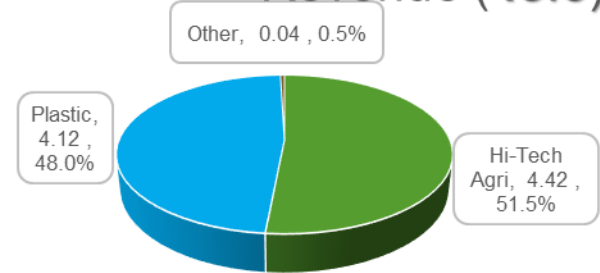
Fruits Processing
Spices Processing

Plastic - Overseas

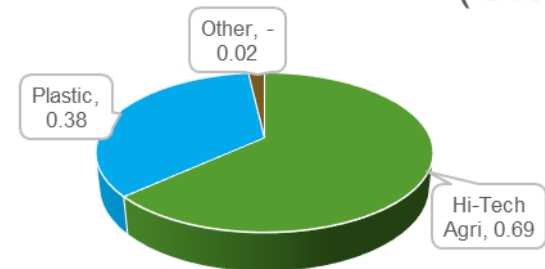
Plastic Sheets

Standalone

Revenue (₹8.6)



EBITDA (₹1.1)



Financial Performance : Consolidated

All figures in ₹ Million

Particulars	1QFY25	1QFY24	YoY change
Revenue	14,779	17,010	-13.1%
<i>Hi-Tech</i>	4,430	5,367	-17.5%
<i>Plastic</i>	5,668	7,222	-21.5%
<i>Agro Processing</i>	4,649	4,386	6.0%
<i>Other</i>	32	35	
EBITDA	1,808	2,186	-17.3%
<i>Hi-Tech</i>	689	909	-24.2%
<i>Plastic</i>	663	810	-18.1%
<i>Agro Processing</i>	481	529	-9.1%
<i>Other</i>	-25	-62	
Margin	12.2%	12.9%	
<i>Hi-Tech</i>	15.6%	16.9%	
<i>Plastic</i>	11.7%	11.2%	
<i>Agro Processing</i>	10.3%	12.1%	
PAT	122	366	
Cash PAT	732	956	

Financial Performance : Standalone

All figures in ₹ Million

Particulars	1QFY25	1QFY24	YoY change
Revenue	8,569	11,460	-25.2%
<i>Hi-Tech</i>	4,418	5,379	-17.9%
<i>Plastic</i>	4,116	6,041	-31.9%
<i>Other</i>	35	40	
EBITDA	1,046	1,522	-31.3%
<i>Hi-Tech</i>	685	908	-24.6%
<i>Plastic</i>	379	664	-42.9%
<i>Other</i>	-18	-50	
Margin	12.2%	13.3%	
<i>Hi-Tech</i>	15.5%	16.9%	
<i>Plastic</i>	9.2%	11.0%	
PAT	64	262	
Cash PAT	434	635	

Business Overview

All figures in ₹ Million

YoY Revenue



Hi-Tech Agri

During the quarter, the Hi-Tech segment saw a 17.5% drop on yoy basis as we have strategically reduced the project business. The retail business fell by 16% due to delay in release of subsidies by the state governments due to code of conduct for general elections. However, exports went up by 93%, mainly due to increased sales to 'Rivulis'.

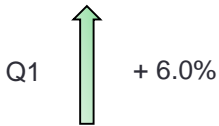
YoY Revenue



Plastic

During the quarter, the Plastic segment saw a 21.5% yoy basis decrease due to a drop in PE pipes for JJM. There was no new JJM business because of the general elections. The retail business mainly comprising of PVC pipes remained stable. However, the overseas plastic sheet business grew significantly by 31.5% yoy basis.

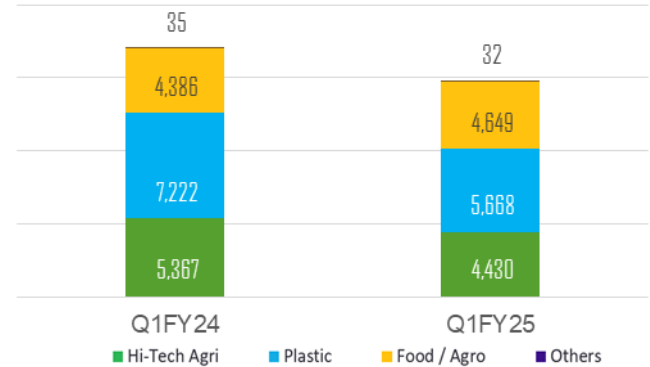
YoY Revenue



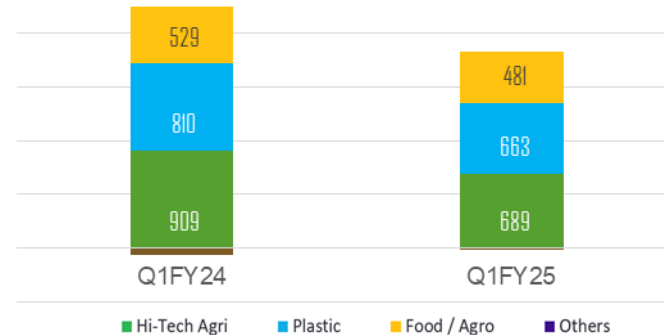
Food/ Agro

During the quarter, the Agro Processing segment increased by 6%. The Indian business grew by 3.7% mainly due to the export of dehydration products like onion, while the overseas business grew by 7.4%, primarily in the European market.

Revenue



EBITDA



Capital Allocation

All figures in ₹ Million

Consolidated

Standalone

Particulars	Consolidated			Standalone		
	30-Jun-24	31-Mar-24	30-Jun-23	30-Jun-24	31-Mar-24	30-Jun-23
Non current assets	57,305	57,471	56,691	44,371	44,510	44,178
Current assets	55,300	54,506	54,187	38,381	38,064	38,465
Non current liab.	1,659	1,766	1,561	476	466	351
Current liabilities	15,761	15,101	16,938	9,185	9,115	9,356
Capital employed	95,186	95,110	92,379	73,091	72,994	72,935
Net worth	57,625	57,391	55,726	48,405	48,337	46,619
Borrowings [^]	37,561	37,720	36,653	24,686	24,657	26,316
Sources of funds	95,186	95,110	92,379	73,091	72,994	72,935

([^] Long Term and Working Capital)

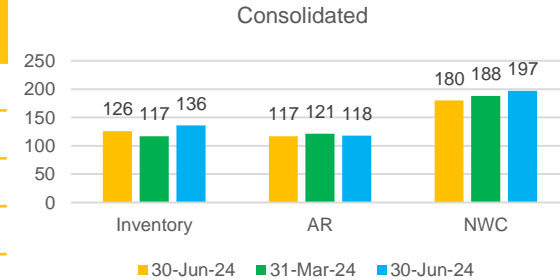
Working Capital Cycle – Days Sales Outstanding (DSO)

	30 Jun 24			31 Mar 24			30 Jun 23		
Consolidated	Inventory	AR	NWC	Inventory	AR	NWC	Inventory	AR	NWC
Hi-Tech Agri	145	197*	288	126	196*	269	115	196*	237
Plastic	55	75	88	42	71	77	50	75	107
Agro/Food	227	57	209	203	73	214	234	55	184
Total	136	118	197	117	121	188	126	117	180

* (i.e. excludes AR from discontinued operations)

NWC days increased by 9 days compared to March 24, mainly due to lower sales. Inventory in the Hi-Tech segment increased for the season, and inventory in the Agro Processing segment increased due to new production. Accounts receivable DSO improved by 3 days on account of good collections of ₹ 1,300 million (on net basis) in both the Hi-Tech and Agro Processing businesses.

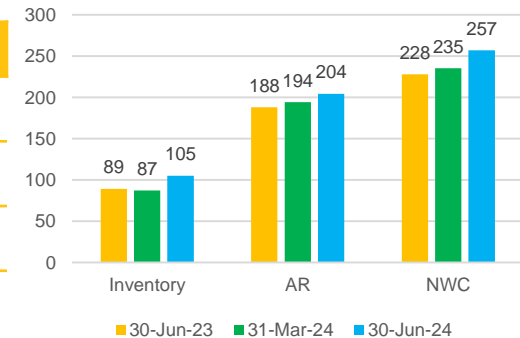
All figures in days (DSO)



	30 Jun 24			31 Mar 24			30 Jun 23		
Standalone	Inventory	AR	NWC	Inventory	AR	NWC	Inventory	AR	NWC
Hi-Tech Agri	149	260	353	129	260	334	116	246	287
Plastic	51	105	117	36	91	95	47	101	134
Total	105	204	257	87	194	235	89	188	228

NWC days increased by 22 days compared to March 24 mainly due to lower sales. Inventory has built up for the season, causing DSO to increase. However, absolute AR have reduced by ₹ 540 million.

Standalone



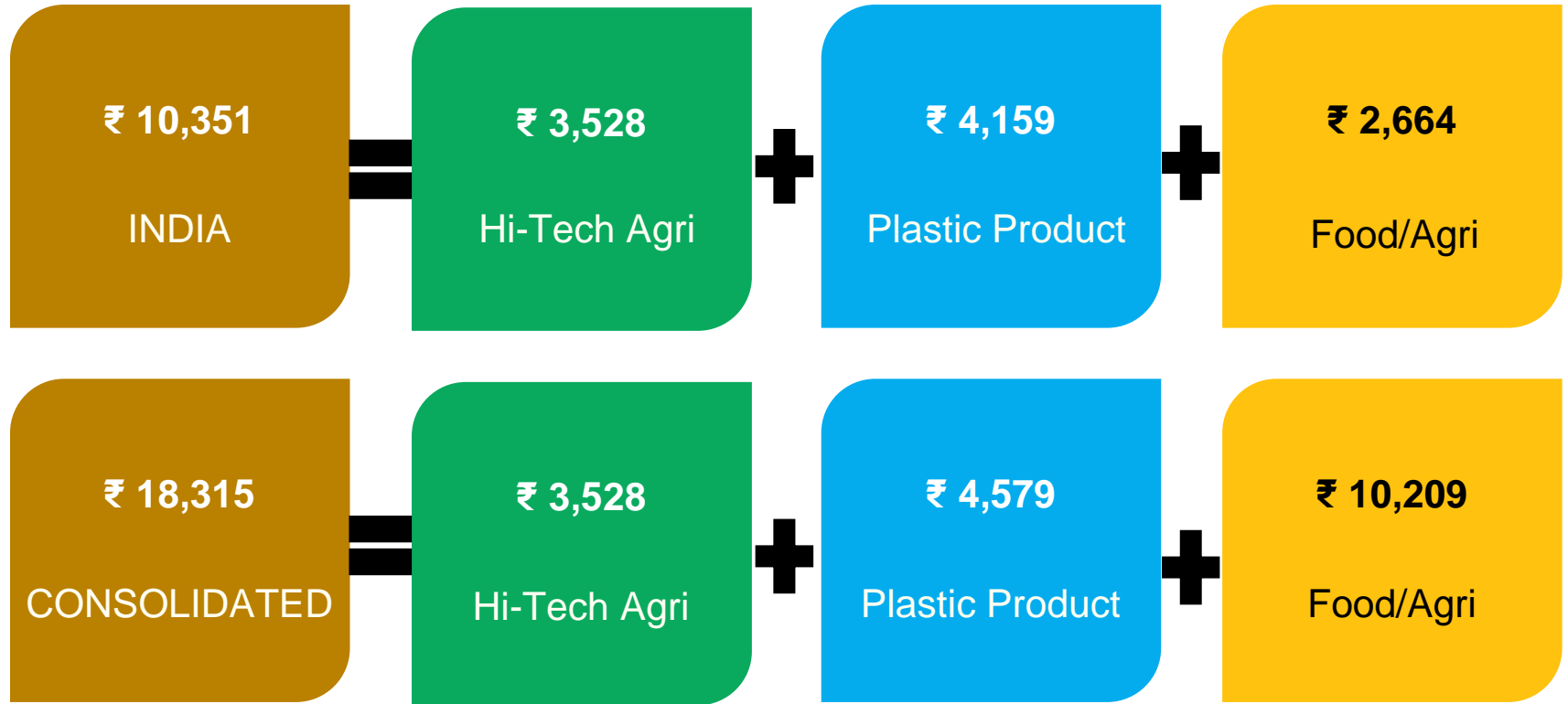
Standalone Debt Profile as on 30 Jun 2024

All figures in ₹ million

Particulars	Outstanding	Outstanding	Repayment Schedule			
	31 Mar 24	30 Jun 24	FY25 [9M]	FY26	FY27	FY28
Term Loans	3,736	3,383	1,568	1,815	-	-
NCDs @0.01%	8,554	8,553	-	-	7,156	1,397
Sub Total	12,290	11,936	1,568	1,815	7,156	1,397
Fund Based Working Capital	14,778	14,988	-	-	-	-
Total Debt	27,068	26,924				
Less: Impact of FV gain of 0.01% NCDs	(2,411)	(2,238)				
Reported Debt	24,657	24,686				

Order Book Position

All figures in ₹ million



This Order book does not factor the orders received by the company on a daily basis from Retail business.

Major push in Union Budget 2024-25 for Agriculture and MSME

Ministry of Agriculture and Farmers' Welfare

- ▶ Union Budget 2024-25 allocated **INR 1.52 lakh crore** for the agriculture and allied sector, increase of ~5% from 2023-24.
- ▶ Allocation of **INR 7,553 Cr** under RKVY scheme (hike of 23% from 2023-24)
- ▶ Increased focus on integrated agriculture sector development, inclusive of sustainable agriculture, provision of advanced and climate-resilient seed varieties

Jain Irrigation doing pioneering work in this area, will help the Company to reach more farmers across the country

Ministry of Jal Shakti

- ▶ Allocation of **INR 69,925 Cr** under JJM / NRDWM
- ▶ Focus on providing functional house tap connection (FHTC) to every household.

Jain irrigation should benefit from government allocation for JJM and NRDWM

Support to MSME

- ▶ Introduction of Credit Guarantee Scheme in line with **CGTMSE**, a major credit guarantee scheme for MSMEs
- ▶ JISL's dealers to avail credit at 9.50%-9.95% pa under EDFs through Banks without collateral and without recourse to JISL

4000+ Dealers of JISL will benefit from the support

Management Commentary

“Leave this world better than you found it.” – Shri. Bhavarlal H Jain

As anticipated, Q1FY25 had lower revenue and consequentially had an impact on margins. The overall revenue was lower by around 13% on consolidated basis mainly due to lower domestic sales on account of institutional business of Jal Jeevan Mission. We continued to reduce project business as planned.

Historically, during rainfall we see a softer business environment for micro irrigation. However, we expect demand revival and pent-up demand in H2FY25 on the back of good monsoon and government announcement in the recent Budget for higher support and commitment to agriculture, irrigation sector, MSME and agri-related businesses. We expect good business opportunities in all our business verticals going forward.

The company continues to focus on creating sustainable profitable growth.

Anil Jain
Vice Chairman & MD

Our Gallery



Jain Seedling

Precision Farming
MUSKMELON
with JAIN Technology



Jain Seedling

- ▶ CROP SPECIFIC SOILLESS MEDIA
- ▶ HEALTHY ROOT SYSTEM
- ▶ ZERO DAY FIELD SETTING
- ▶ DISEASE FREE PLANTS

JAIN CHILI SEEDLINGS



Jain Seedling

Watermelon Seedlings

- ✓ No seed mixture
- ✓ Healthy & Vigorous Root system
- ✓ Uniform Seedling Growth
- ✓ Varieties available: Sugar Queen, Sindhia, Super queen, Bahubali, MAXX, Sugar King are available on demand.



जैन स्वीट ऑरेंज
साप्लिंग

- आनुवंशिक शुद्ध, सुदृढ़ एवं शीघ्रपक कोषे
- उपत्यका में लगाया जायेगी
- उत्कृष्ट फल गुणवत्ता



Profuse Fruiting & Vigorous Growth

Jain Tissue-Culture

Pathogen & Disease Free Plants

Available in BD cup Packaging

Varieties: Bhagwa, Super Bhagwa, Mrudala

Pomegranate
TISSUE CULTURE PLANTS



Jain Graftling

CUSTARD APPLE
Graftlings

DID YOU KNOW?

At Jain Hi-Tech Plant Factory, we manufacture planting material above customer expectations.



Jain Seedling

PAPAYA SEEDLINGS

- Seedlings raised through seeds procured from authentic sources.
- Assures No seedling mixture
- Variety Available: TAIWAN 286 (Red Lady)



Chili Seedlings

BRING HEALTHY, DISEASE FREE PLANTS TO YOUR FARM!

Jain Seedling

Our Gallery



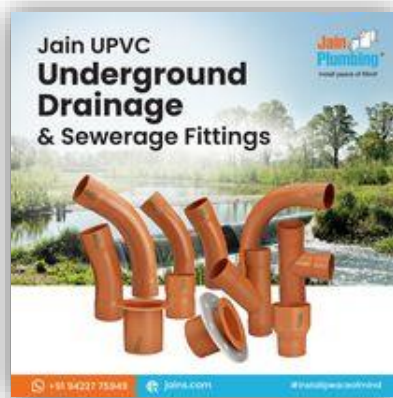
Our Gallery



JAIN PLUMBING
brings you pipes and fittings that are lead-free and non-toxic, ensuring your drinking water stays as pure as a mountain stream!

Jain Plumbing
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Jain UPVC Underground Drainage & Sewerage Fittings

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Jain UPVC SWR Fittings: Single Y Rubber Ring Type With Door

Jain Plumbing
Small Ideas. Big Revolutions.®

Features & Benefits:

- Lightweight & Strong
- Quick & Easy to Install
- High quality standard
- Maintenance Free

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Where Strength Meets Reliability

Jain Plumbing
Small Ideas. Big Revolutions.®

- Easy to Install
- Economical
- Durability 50+ years
- No Electrical work required

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Jain UPVC SWR Fittings 87.5° Solvent Type Bend With Top Door

Jain Plumbing
Small Ideas. Big Revolutions.®

Features & Benefits:

- Uniform wall thickness
- Non corrosive
- Can resist high flow rates
- Chemical Resistant

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Jain UPVC ASTM Piping System

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Safe for Drinking Water

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Concerned about the potential contamination of your drinking water?

Jain Plumbing
Small Ideas. Big Revolutions.®

Make the switch to the Jain uPVC

ASTM PIPING SYSTEM

today & witness the difference firsthand.

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Jain UPVC SWR Pipe

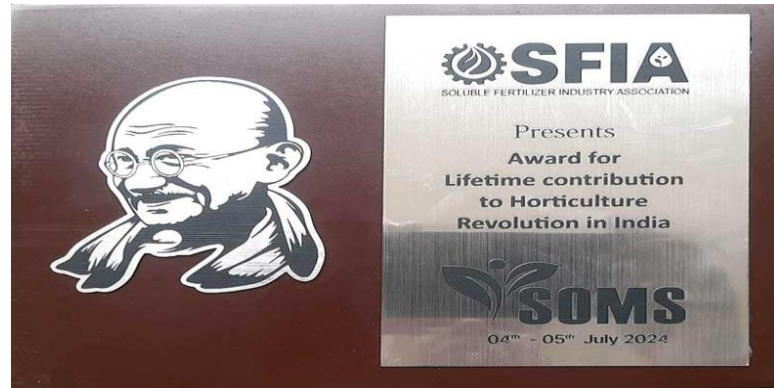
Jain Plumbing
Small Ideas. Big Revolutions.®

Features & Benefits:

- UV stabilized - Weather resistant
- EPDM rubber ring joint / Solvent Type with Leak Proof Joining
- Highly resilient and Impact Resistant
- Smooth inner surface

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Awards



Jain Irrigation Honored with "Heroes of Horticulture" Award. 5-July-2024

Gandhi Nagar, India Jain Irrigation Systems Ltd. is proud to announce its recognition with the prestigious "Heroes of Horticulture" award at the National Conference on Soluble Fertilizers, held on July 4-5 in Gandhi Nagar. This esteemed accolade, presented by the Specialty Fertilizers Association of India, honors Jain Irrigation's innovative contributions to the soluble fertilizers industry.

The conference, inaugurated by Hon. Agricultural Minister Shri Raghavaji Bhai Patel, gathered key players from the Water Soluble Fertilizers (WSF) sector. Jain Irrigation stood out as the sole irrigation company invited to this significant event.

BD Jade, representing Jain Irrigation, delivered an inspiring presentation on the company's pioneering journey in fertigation technology. He highlighted Jain Irrigation's early adoption and continuous development of liquid fertilizers, emphasizing the company's commitment to advancing agricultural practices and supporting sustainable horticulture.

This recognition reaffirms Jain Irrigation's dedication to innovation and excellence in the agricultural sector. The company remains steadfast in its mission to provide cutting-edge solutions that promote efficient and sustainable farming practices.

Awards



Jain Irrigation bags 6 Plex Council awards for best export performance. 11-June-2024

Maharashtra Governor Ramesh Bais is seen giving six Plex Council Award awards to Jain Irrigation's D. M. Barhate, Dr. Kalyani Moharil, Atin Tyagi and Narendra Tyagi.

[READ MORE](#)

Recent Updates



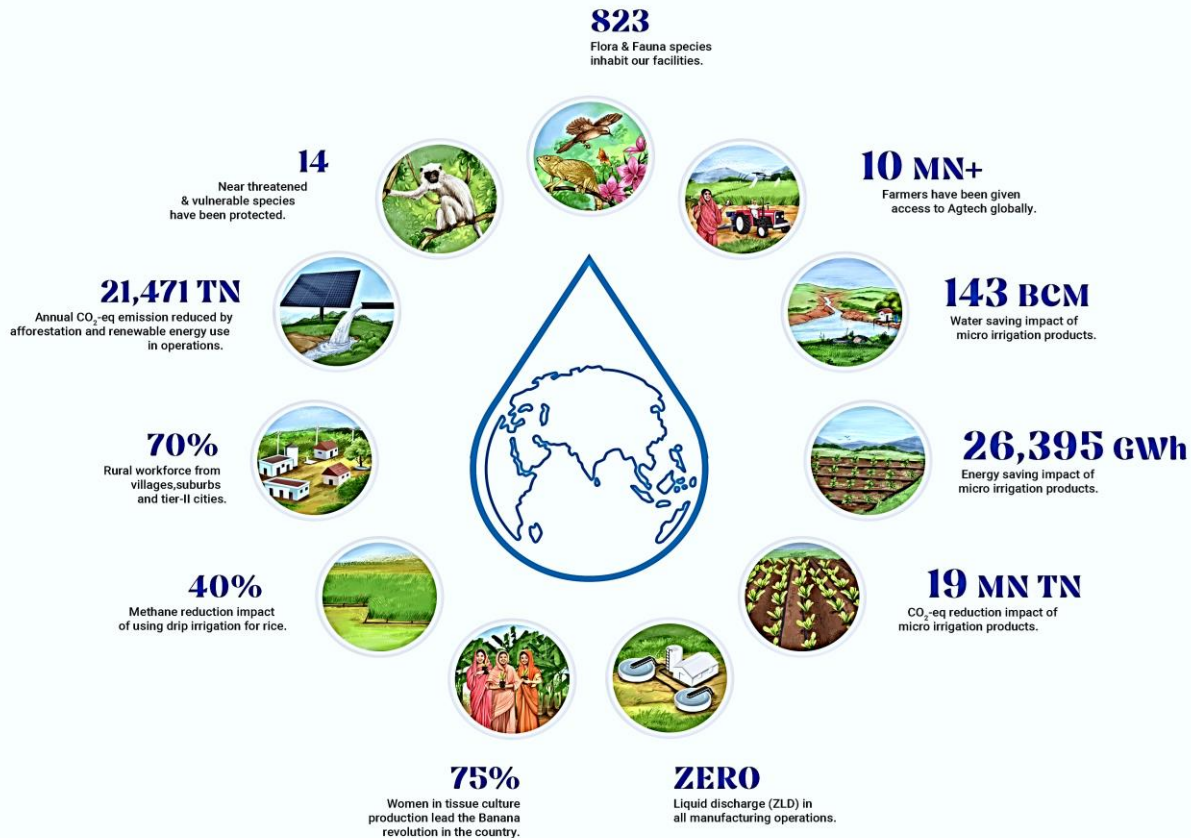
Agroforestry: A Sustainable Agriculture - Hope of Farmers.

22-June-2024

Farmers face a plethora of challenges today: labor shortages, fluctuating crop prices, and rising input costs. Climate change exacerbates these issues, making traditional farming increasingly untenable. However, agroforestry offers a sustainable alternative, providing farmers with a low-risk, low-input agricultural model that is a little more immune to climate variability. Though the economic returns from agroforestry might be modest, its resilience and sustainability make it an attractive option for farmers.

[READ MORE](#)

ESG Impact



CSR Update

Jain Irrigation Systems Limited (JISL) has actively engaged in various Corporate Social Responsibility (CSR) activities during the current financial year, focusing on rural development, education, sports, environmental conservation, hunger eradication and pandemic support. Below are the key highlights of our CSR initiatives:

- a) Rural Development Activities through Ba-Bapu 150 Project** Our Rural development interventions under Ba- Bapu- 150 project are inspired by the idea of “Gram Sarvodaya” (a self-sustained village) as proposed by the Father of the Nation - Mahatma Gandhi. The Ba- Bapu 150 team started its first phase by selecting and initiating its activities in 22 villages in Jalgaon district. Key focus of our rural development projects include promoting water sanitation and hygiene (WASH), and making safe drinking water available to the remote and rural communities. Entrepreneurship, watershed development, FPO and sustainable agriculture are the other key indicators under Ba-Bapu 150 project.
- b) Ensuring Environmental Sustainability** Ensuring environmental sustainability through natural resource conservation, and environmental protection is embedded in our mission statement. Company is committed to protect the environment from impacts of climate change and we are among very few organizations in the country that have incorporated GHG accounting and mitigation actions in their management systems and got it certified from a third party. We participate in a voluntary plantation program on world environment day every year. In addition we also support Maharashtra government’s afforestation mission from time to time.
- c) Promoting Education** Anubhuti is our flagship project in this area. Anubhuti English Medium School was conceived by Bhavarlal H. Jain and instituted in Jalgaon to provide quality English Medium Education to underprivileged children. It was initially started with 180 students in Classes I and II and today it has more than 500 students in class I to IX. Anubhuti English medium school for underprivileged children provides quality education with facilities comparable to the best schools. The classrooms have furniture and facilities specially designed for children. The school provides nutritious food three times a day to all students. Students are also provided with all clothes, books, educational material and medical attention. This directly reflects one of the principles of education at Anubhuti, where the limitations of individuality and need for inter-dependence are emphasized.

CSR Update

- d) Promoting Sports** Our Jain Sports Academy (JSA), which functions under the BKJMF trust, is responsible for coordinating and handling all activities related to sports. Today the Academy has more than 450 players across all over sports. The Academy provides training and conduct competitions in most traditional Indian games like kho kho, volleyball, table tennis, badminton, swimming, cricket, trekking, chess, cycle racing, skating, marathon, carom, basketball and football, among others. The academy also hosts inter-school/inter-district sports events with around 750 students. Jain Sports Academy has a Corporate Cricket Team where our associates are participating in various cricket tournaments. We are the champions of 'A' Division of Times Shield Cricket Tournament which is prestigious in the world of cricket in India Many players from Jain Sports Academy are a part of national team across various sports. JSA's national carom player represented India and was a part of Indian National Women Carom Team which won the World Championship at South Korea by beating Sri Lanka Women Carom Team in the finals. Company's most of spending goes towards sports material and infrastructure, coaching fees and payment made to budding sportsmen and their coaches.
- e) Healthcare** Kantai Netralaya is an eye hospital supported by JISL's one of the company foundations- Bhavarlal Kantaibai Jain Multipurpose Foundation (BKJMF) and managed by Poona Blind Men Association (PBMA). JISL and PBMA came together in this project with a common goal to eradicate preventive blindness and make Jalgaon cataract free district. Kantai Netralaya aims at providing comprehensive quality eye care without discrimination between free and paid patients. We conduct regular outreach programs in nearby rural areas to create awareness and provide free eye care treatment to poor and needy. This year Kantai Netralaya's aim is to complete 150 Squint Removal Surgeries out of which 60 surgeries will be done at free of cost.
- f) Hunger Eradication** Since the outset of Pandemic - COVID-19, JISL has been providing food to the migrating labors passing through the city, to the colony of labors/workers and to the other needy residents of Jalgaon. During the COVID Period Company has distributed 14,000 meals per day to labors/workers and other needy residents of Jalgaon and Company still continues to do so through project "Snehachi Shidori" by distributing 1,400 meals on daily basis to poor, needy and Niradhar people in Jalgaon. Anyone in need can access these food parcels free of charge. To date, this project has distributed over 1.5 million food parcels.

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Let's meet on “Q1 FY25 Earnings Conference Call”

On Wednesday, 31st July, 2024 at 03:30 PM IST

Dial-in numbers

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