

20 May 2021

Corporate Service Department <b>BSE Limited</b> 25 <sup>th</sup> Floor, Phiroze Jeejeebhoy Towers, Dalal Street, Mumbai 400 001	The Listing Department <b>National Stock Exchange of India Ltd</b> Exchange Plaza, Plot no. C/1, G Block, Bandra-Kurla Complex, Bandra (E) Mumbai 400 051
<b>Scrip:</b> Equity 500135. NCDs 960308, 960310 & 960311.	<b>Trading Symbol:</b> EPL

**Ref.: EPL Limited (EPL)**

**Sub.: Investors notes/updates with respect to the Audited Financial Results for the Quarter and year ended 31 March 2021.**

Dear Sirs,

Please find attached copy of the Investors notes/updates as mentioned in the subject line.

We request you to kindly take note of the aforesaid and acknowledge receipt.

Thanking You

Yours faithfully  
For EPL Limited



Suresh Savaliya  
Head - Legal & Company Secretary

**Encl.:** As above

Filed online



**EPL LIMITED**  
(Formerly known as Essel Propack Limited)  
Q4 FY21 Earnings Presentation

## Safe Harbour

Certain statements in this presentation concerning our future growth prospects are forward-looking statements. The Company cautions that, by their nature, forward-looking statements involve risks and uncertainties that could cause actual results to differ materially from those in such forward-looking statements. The risks and uncertainties relating to these statements include, but are not limited to, risks and uncertainties regarding fluctuations in earnings, our ability to manage growth, intense competition in packaging industry including those factors which may affect our cost advantage, wage increases, our ability to attract and retain highly skilled professionals, time and cost overruns on fixed-price, fixed-time frame contracts, client concentration, industry segment concentration, our ability to manage our operations, reduced demand for packaging products in our key focus areas, our ability to successfully complete and integrate potential acquisitions, liability for damages on our service contracts, the success of the companies in which is EPL (Formerly known as Essel Propack Limited) has made strategic investments, withdrawal of governmental fiscal incentives, political instability and regional conflicts, legal restrictions on raising capital or acquiring companies, and unauthorized use of our intellectual property and general economic conditions affecting our industry. The Company does not undertake to update any forward-looking statements that may be made from time to time by or on behalf of the Company.



## EPL 2.0

*Market Leading Revenue Growth  
and  
Capital Efficient, Consistent Earnings Growth*

## FY21 – Transformed EPL to deliver market leading, double digit revenue growth

### 1 Demonstrated resilience in business performance despite impact of Covid-19

- Double digit revenue growth
- High teens EPS growth
- RoCE improved by 290 bps to 21.3%.

### 2 Strengthened our competitive position across markets.

- Acquired Creative Stylopack in India

### 3 Delivered strong progress across all our identified levers:

- Accelerated growth in Personal Care
- Continued leadership in Oral Care
- Improved Performance in Europe
- Industry leadership in eco-friendly solutions

## Worked Proactively with All Stakeholders to Ensure Business Continuity and Minimize Covid-19 Impact

### Supply Enablement

*All plants operational*

- ▶ Proactively worked with regulatory authorities and customers to classify EPL in the “essential services” category
- ▶ All plants are currently operational

### Demand Generation

*New category launched: Hand Sanitizer/Hand wash*

- ▶ Product innovation extended to launch hand washes in tubes.
- ▶ Envisioning to become a large player in hand wash category going forward.
- ▶ Opportunity to increase wallet share in existing categories

### Employee Wellness

*Crisis Committee Constituted*

- ▶ Rigorous employee safety measures adopted across all factories
- ▶ Crisis committee constituted comprising CEO, COO, CFO, and regional heads

### Cost Management

*Project Phoenix*

- ▶ Project Phoenix continues to contribute towards margin enhancement.
- ▶ Initiatives and targets identified for FY22.

## FY21 - Double digit revenue growth coupled with strong earnings growth

(INR million)

	FY20	FY21	Growth		
<b>Growth<sup>1</sup></b>	Revenue	27,614	30,916	12.0%	↑
	Adjusted EBITDA	5,709	6,472	13.4%	↑
	Adjusted EPS (INR)	6.60	8.89	34.6%	↑
<b>Capital Efficiency</b>	ROCE <sup>2</sup>	As of March'20 18.4%	As of March'21 21.3%	290 bps	↑
	Net Debt	2,760	3,149	Includes INR 1675 mm of cash proceeds paid for Creative acquisition. Adjusted for this net debt is INR 1474 mm	
	Capex	FY20 1,286	FY21 1,760		

(1) Refer page 31 for details on Adjusted EBITDA and Adjusted EPS

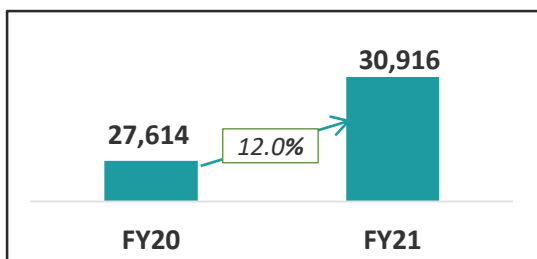
(2) Return on Capital Employed, defined as EBIT / Average Capital Employed, on a trailing twelve month basis and adjusted for INR 160 mn in Mar 21 (INR 98 mn for Mar20) of Transition Services Agreement (TSA) related expense, Nil in Mar 21 (INR 11 mn in Mar 20) of tax amnesty expenses and INR 144 mn for Mar 21 (Nil for Mar 20) of ESOP related expenses.

# FY21 Consolidated Financial Highlights :

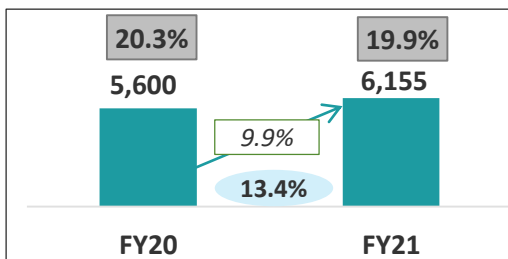
## Double digit revenue growth coupled with strong earnings growth

(INR million)

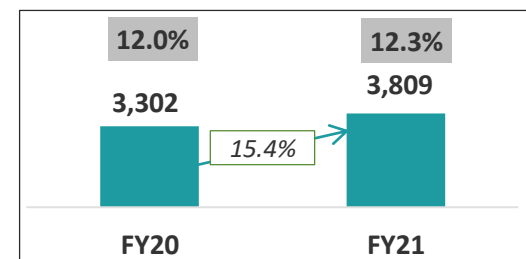
### Revenue from Operations



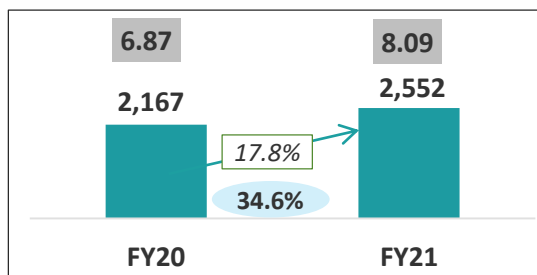
### EBITDA and EBITDA Margins



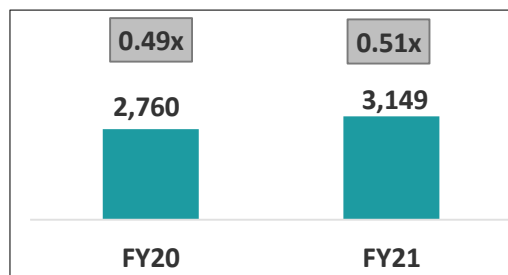
### EBIT and EBIT Margins



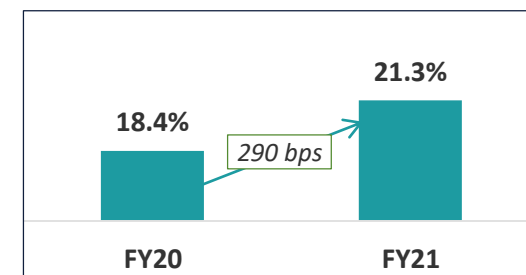
### PAT<sup>1</sup> and EPS (INR)



### Net Debt and Net Debt/EBITDA



### ROCE<sup>2</sup>



Adjusted growth %

Includes INR 1675 mm of cash proceeds paid for Creative acquisition. Adjusted for this net debt is INR 1474 mm

- ▶ Robust revenue and PAT growth despite Covid-19. Organic revenue growth at 11.3%
- ▶ EBITDA margin maintained despite steep RM price increase and Covid-19 situation.
- ▶ Net Debt to EBITDA at strong 0.5 times.
- ▶ Focus on capital efficiency yielding results, driving increase in ROCE to 21.3%.

(1) Excluding exceptional items (2) Return on Capital Employed, defined as EBIT / Average Capital Employed, on a trailing twelve-month basis and adjusted for INR 160 mn in Mar 21 (INR 98 mn for Mar20) of Transition Services Agreement (TSA) related expense, Nil in Mar 21 (INR 11 mn in Mar 20) of tax amnesty expenses and INR 144 mn for Mar 21 (Nil for Mar 20) of ESOP related expenses.



## EPL - Double digit revenue growth coupled with strong earnings growth

(INR million)

	Q4FY20	Q4FY21	Growth		
<b>Growth<sup>1</sup></b>	Revenue	6,896	8,102	17.5%	↑
	Adjusted EBITDA	1,450	1,527	5.3%	↑
	Adjusted EPS (INR)	1.64	2.12	29.6%	↑
<b>Capital Efficiency</b>		As of March'20	As of March'21		
	ROCE <sup>2</sup>	18.4%	21.3%	290 bps	↑
	Net Debt	2,760	3,149	Includes INR 1675 mm of cash proceeds paid for Creative acquisition. Adjusted for this net debt is INR 1474 mm	
	FY20	FY21			
Capex	1,286	1,760			

(1) Refer page 32 for details on Adjusted EBITDA and Adjusted EPS

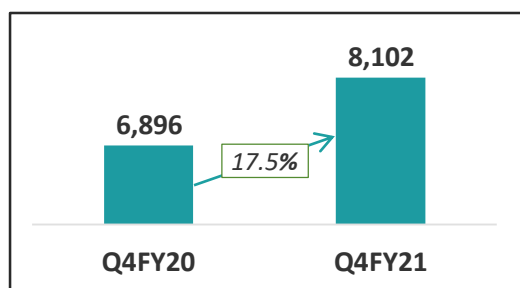
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# Q4FY21 Consolidated Financial Highlights :

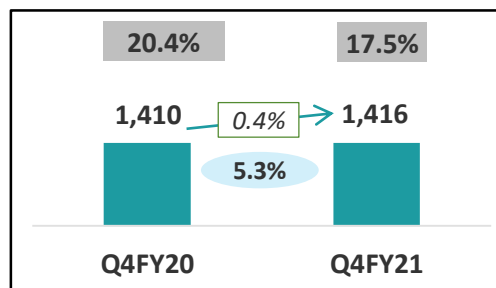
## Strong revenue growth of 17.5% with high teen growth in PAT

(INR million)

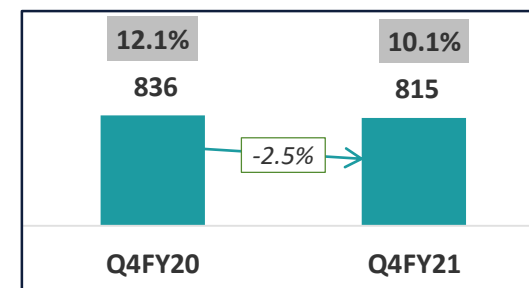
Revenue from Operations



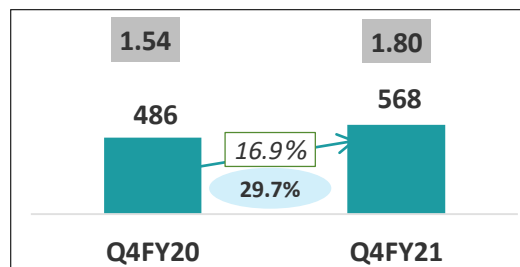
EBITDA and EBITDA Margins



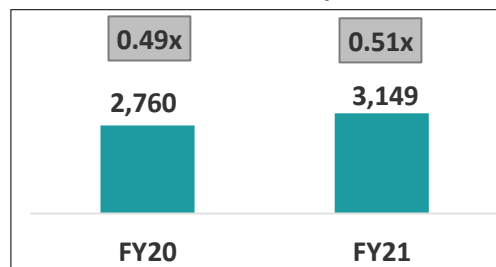
EBIT and EBIT Margins



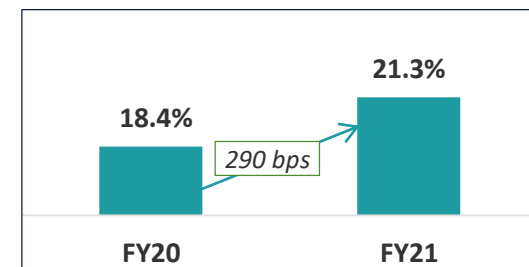
PAT<sup>1</sup> and EPS (INR)



Net Debt and Net Debt/ LTM EBITDA



ROCE<sup>2</sup>



Adjusted growth %

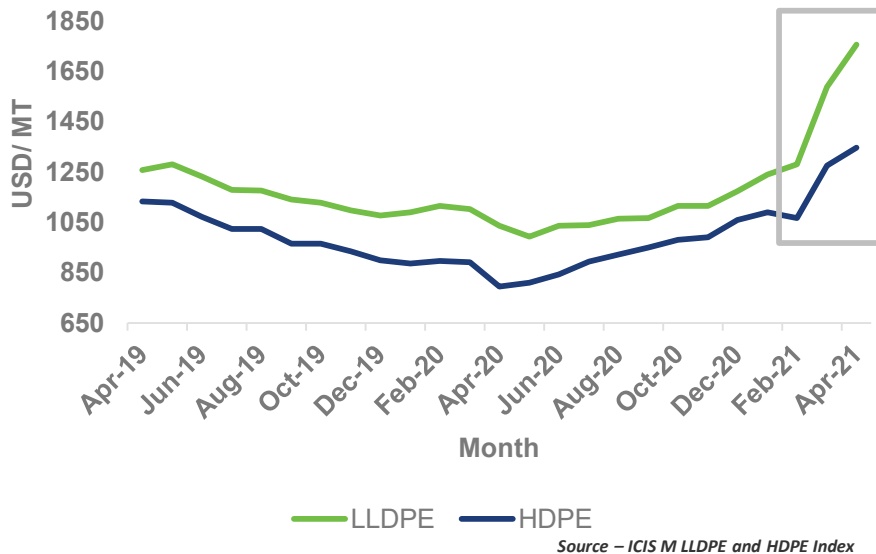
Includes INR 1675 mm of cash proceeds paid for Creative acquisition. Adjusted for this net debt is INR 1474 mm

- ▶ Robust revenue and PAT growth despite Covid-19. Organic Revenue growth at 14.9%
- ▶ EBITDA growth lower than revenue growth because of steep increase in raw material prices, time lag in recoveries and Covid-19 related one-time operational expenses.

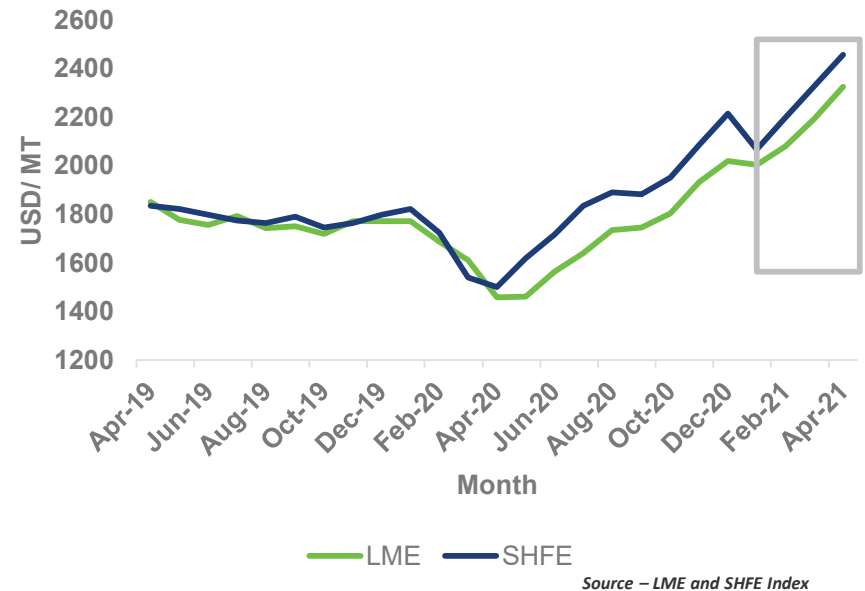
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## Unprecedented price increase in key raw materials

### Polymer Movement



### Foil Movement



- ▶ Unprecedented RM price increase of ~ 25% QoQ as against historical movement in the broad band of +/-5%

## Holistic EBITDA margin improvement plan in place

Holistic EBITDA margin improvement plan already in place for FY22 through a three-pronged approach:

### 1 Judicious Price Increases

- ▶ Contractual pass-through in long term contracts has a 3-month lag
- ▶ Price corrections being negotiated across geographies to offset the raw material price increase

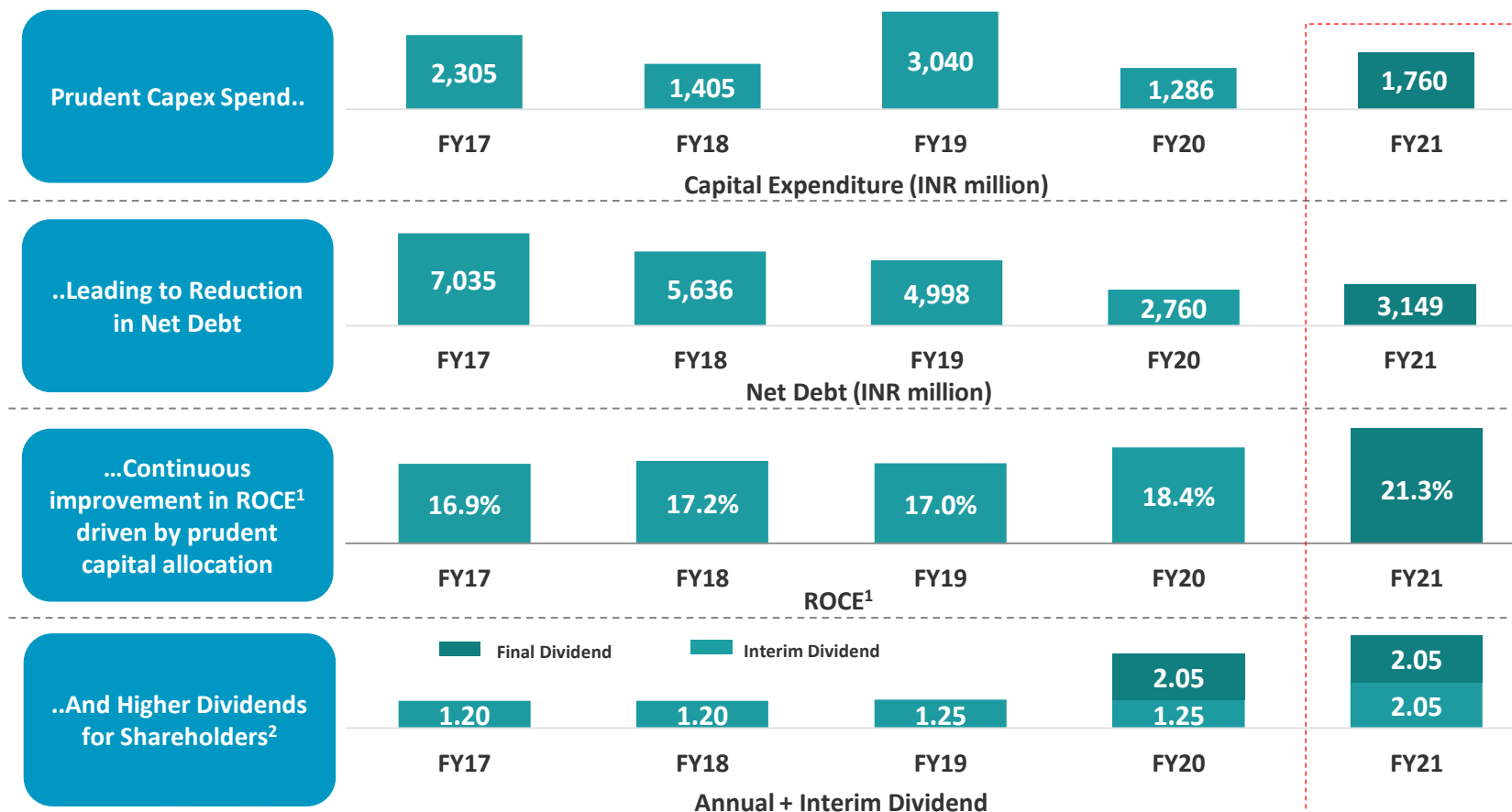
### 2 Cost Productivity Initiatives: Project Phoenix Phase II

- ▶ “Modern Times”: Improving manufacturing efficiency through automation
- ▶ Increased in-house manufacturing of caps and closures
- ▶ Scrap and wastage reduction
- ▶ Rationalization of energy consumption

### 3 Mix Improvement

- ▶ Focus on higher-profit segments and value-added offerings

## Continued Focus on Capital Efficiency



(1) Return on Capital Employed, defined as EBIT / Average Capital Employed, on a trailing twelve-month basis and adjusted for INR 160 mn in Mar 21 (INR 98 mn for Mar20) of Transition Services Agreement (TSA) related expense, Nil in Mar 21 (INR 11 mn in Mar 20) of tax amnesty expenses and INR 144 mn for Mar 21 (Nil for Mar 20) of ESOP related expenses.

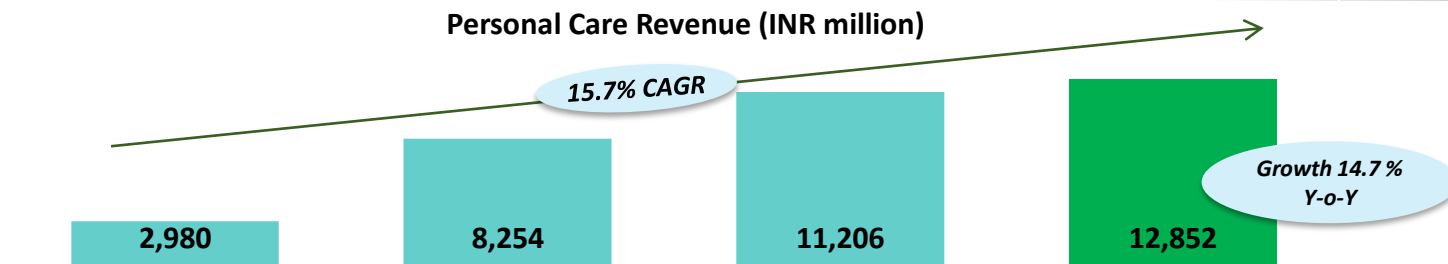
(2) Dividend adjusted for bonus shares to make it comparable

## Delivered strong progress across all our identified levers

- **Accelerated growth in Personal Care**
- Continued leadership in Oral Care
- Improved Performance in Europe
- Industry leadership in eco-friendly solutions

## Personal Care has grown at a 15.7% CAGR Over the Last Ten Years and Continues to be the Major Growth Driver for EPL in FY21

Personal Care Revenue (INR million)



Sub-categories	FY11	FY15	FY20	FY21
Face Care	✓	✓	✓	✓
Hair Care	✗	✗	✓	✓
OTC Medication	✗	✓	✓	✓
Prescription Medication	✗	✗	✓	✓
Food	✗	✓	✓	✓
Home	✗	✗	✓	✓
Hygiene Products	✗	✗	✓	✓
Eye Care	✗	✗	Actively Pursuing → ✓	✓
Hand Cream	✗	✗	✓	Actively Pursuing ← ✓
New Applicator (B&C)	✗	✗	✗	✓

Ongoing shift towards laminated tubes across Beauty & Cosmetics and Pharma is driving growth in Personal Care

## Personal Care Contribution stood at 46% in FY21

Personal Care Contribution to Tube Revenue

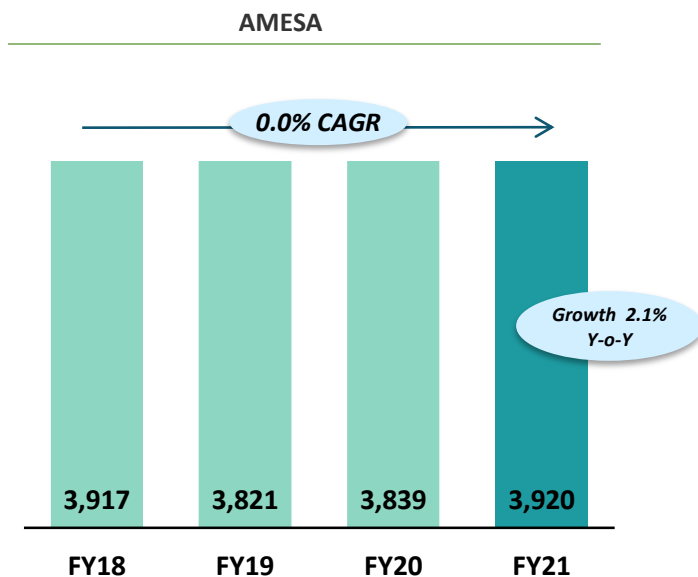


Despite clear headwinds in B&C, Personal care share held by increased demand of Hygiene Products



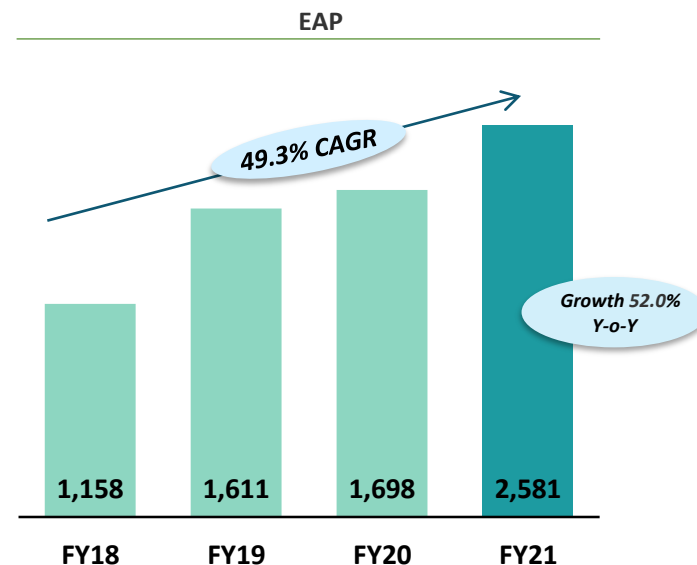
## Continued Growth in Personal Care (1/2)

(INR million)



**Highlights**

- ▶ Personal Care contribution declined to 49.2% in FY21 (v/s 49.9% in FY20), due to sluggish demand in B&C on account of ongoing Covid-19 outbreak, However B&C has recovered in the second half.
- ▶ Timely innovation and launch of Hygiene products aided in boosting the FY21 performance.



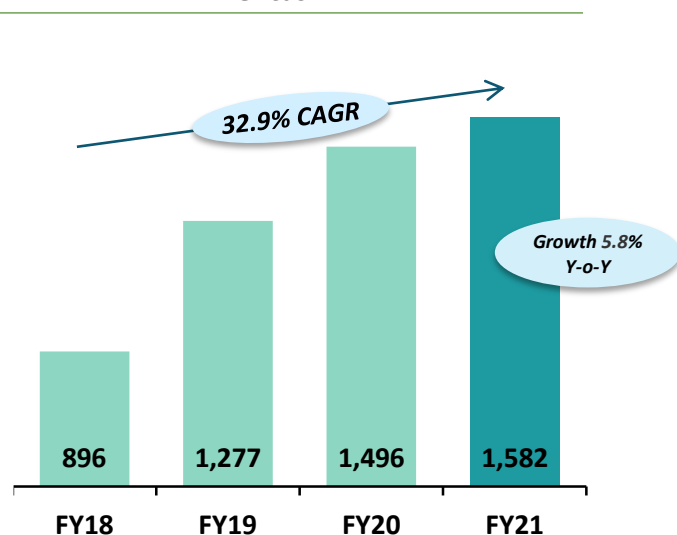
**Highlights**

- ▶ Personal Care contribution increased to 40.4% in FY21 (v/s 34.5% in FY20). Growth is majorly driven by B&C and Pharma segments.
- ▶ Strong business pipeline and increased focus on fast-growing regional players has driven robust growth in FY21.

## Continued Growth in Personal Care (2/2)

(INR million)

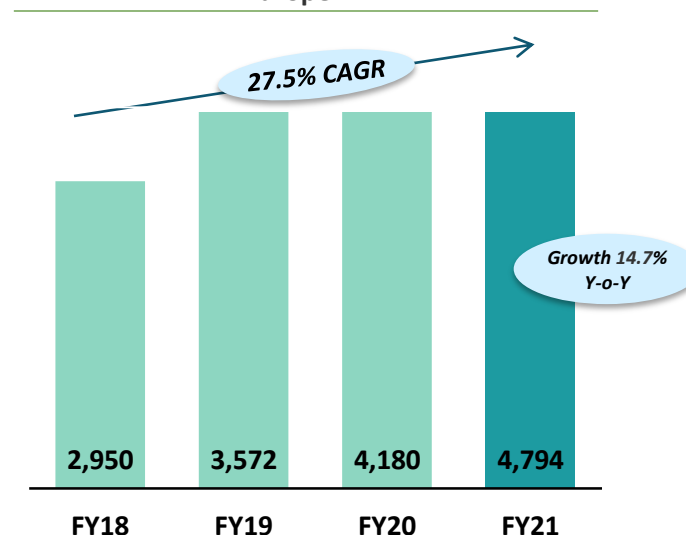
### Americas



#### Highlights

- ▶ Personal Care contribution is maintained at 25.0% in FY21 (v/s 25.4% FY20).
- ▶ New customer wins across categories; bottle to tube product conversions; cross-selling Personal Care products to existing Oral care customers

### Europe



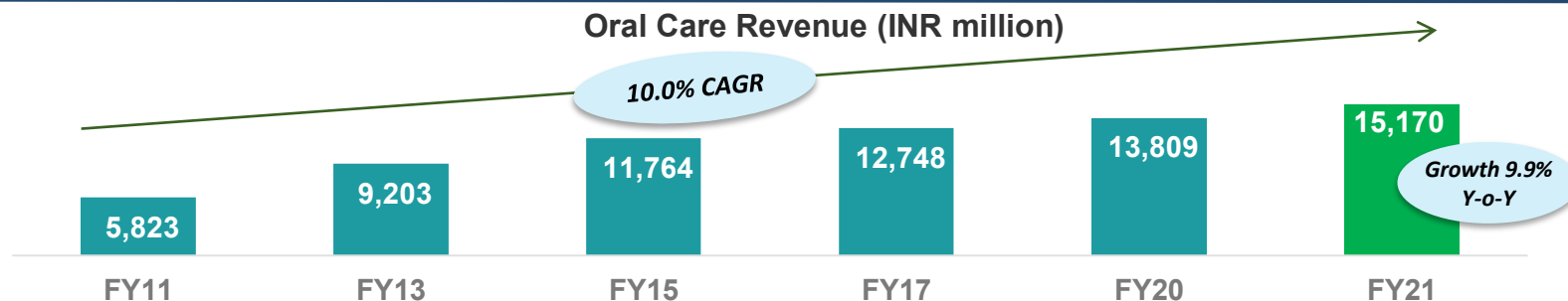
#### Highlights

- ▶ Personal Care contribution increased to 65.2% in FY21 (v/s 64% in FY20).
- ▶ Strong new customer wins across Personal Care categories; robust business development pipeline

## Delivered strong progress across all our identified levers

- Accelerated growth in Personal Care
- **Continued leadership in Oral Care**
- Improved Performance in Europe
- Industry leadership in eco-friendly solutions

## EPL has Established Global Leadership in Oral Care with the Segment Demonstrating Steady Long-Term Revenue Growth at a CAGR of 10.0%



### Customers



### Market Positioning

1. Market leader across key markets
2. Long term relationships with customers
3. Continued leadership through product and process innovation
4. Unique, agile, and customer-specific supply chain models

#1

### Business highlights

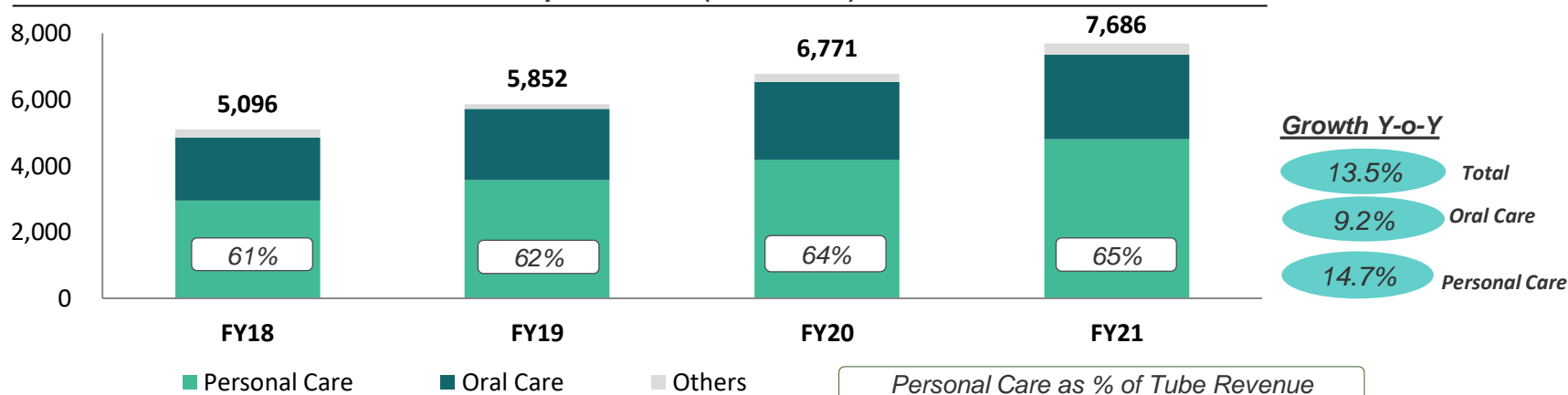
1. Wallet share gain with marquee global consumer companies. Global major added in Europe.
2. Market share gain from regional players in China.
3. Wallet share gain in the leading Oral brands in Americas
4. Oral care category grew in India with strong wallet share gain.

## Delivered strong progress across all our identified levers

- Accelerated growth in Personal Care
- Continued leadership in Oral Care
- **Improved Performance in Europe**
- Industry leadership in eco-friendly solutions

## Continued Growth Momentum in Europe across Oral and Personal Care Categories

Europe Revenue (INR million)



### Efforts/Investments in last few quarters starting to show results

1. Strengthening of front-end organization
2. Improved pipeline development process
3. Investments in capabilities and flexibilities
4. High customer engagement driven by best-in-class offerings and service levels

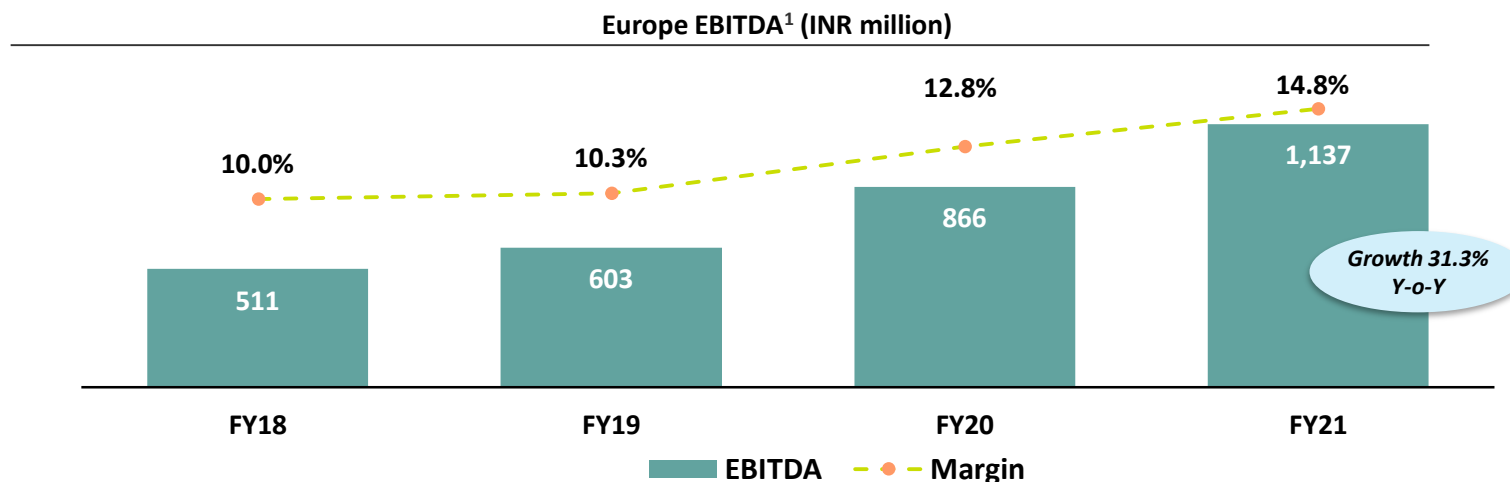


### Impact

1. Accelerated growth across categories
2. With the recent key customer wins in Europe, EPL now serves all major Oral Care players in the region

EPL continues to deliver robust growth driven by new customer wins and wallet share gain

## Leading to Strong EBITDA Growth and Margin Improvement



### Key elements to profit growth

1. Revenue growth contributing to fixed cost leverage
2. Shift towards premium products
3. Lean initiatives and productivity improvement

### Impact

1. Strong FY21 EBITDA<sup>1</sup> growth of 31.3% y-o-y
2. Margin expansion by 200 bps y-o-y.
3. Initiatives including operating leverage drives the improvement in EBITDA margins.
4. Operations further optimized with the closure of Russia Manufacturing facility.

Sustained momentum will lead to continuous performance improvement

## Delivered strong progress across all our identified levers

- Accelerated growth in Personal Care
- Continued leadership in Oral Care
- Improved Performance in Europe
- **Industry leadership in eco-friendly solutions**



## Sustainability: An Intrinsic Value at EPL



**Platina laminated tubes fully recyclable in HDPE bottle stream**

- ▶ Recognized and certified by **APR / RecyClass / Cyclos**
- ▶ Widest thickness range of tubes offering: 220u – 350u
- ▶ Designed to incorporate > **50% Green “Sustainably Sourced PE”**
- ▶ Designed to incorporate > **30% PCR resins**



The Association of  
Plastic Recyclers



RecyClass™

## Sustainability : “Leading the Pack”

### Platina Pro - Next gen sustainable laminated tubes

- ▶ Fully recyclable tubes in HDPE bottle stream approved by APR and RecyClass
- ▶ Enhanced haptics
- ▶ Enhanced chemical resistance
- ▶ Enhanced flavor barrier

RecyClass™



### Etain tubes with **Post Consumer Recycled (PCR)** resin content

- ▶ Eco-friendly tube from EPL with up to 30% PCR content in the tube wins the prestigious ETMA "Tube of the Year" Award 2020
- ▶ Successfully launched laminated tubes with up to 50% PCR content.

etma  
**TUBE**  
OF THE YEAR  
**2020**



### Building a portfolio through industry-leading pipeline

- ▶ **Platina vision**
- ▶ **Platina me**
- ▶ **Platina shine**
- ▶ **Platina pcrmax**
- ▶ **Platina biomax**

## Sustainability: A Promising Start



**Dave Ingram** • 2nd  
Chief Procurement Officer  
5h • 

+ Follow

Since 2019, **Unilever** has been committed to halving our use of virgin plastic by 2025, reducing plastic packaging by more than 100,000 tonnes, increasing the amount of recycled plastics that we use, and collecting and processing more plastic packaging than we sell.

Which is why I'm proud of our latest packaging innovation which will see our entire toothpaste portfolio shift to recyclable tubes by 2025. The new tubes are made from High-Density Polyethylene (HDPE), one of the most widely recyclable plastics globally, and have been approved by RecyClass, which sets the recyclability standard for Europe, as well as laboratories in Asia and North America.

Big thanks to our packaging manufacturers **EPL Limited**, **Amcor**, **Huhtamaki** and Dai Nippon Indonesia (DNPI), as well as global recycling organisations for your partnership in ensuring the value chain was aligned in the creation, collection and recycling processing of the product.

**#ProcurementwithPurpose**  
**#UniquelyUnilever #WasteFreeWorld**



The Association of  
Plastic Recyclers

First tube supplier in the world to  
get approval from APR for full tube  
along with barrier shoulder and cap



Commercialization begins with 100 mm units

## Corporate Social Responsibility



### Focus area:

EPL's Strategy will focus on Sustainability and Sustainable Development with core values of Prosperity, Balance & Harmony, Vitality, Regeneration & Renewal, and Invigoration



### Partnership:



EPL has Partnered with Samhita to build a comprehensive CSR strategy.



### Governance:

CSR Board Committee will review all the activities. In addition to this all the CSR activities will be governed by a 5 member CSR Governing Council consisting of the senior leaders of EPL.

### Our Vision: Greening Lives



#### Green communities:

Working on Waste management programs in communities to encourage and facilitate circular economy.

#### Support for Health care workers:

Donated INR 5 mm to India Protector Alliance via Collective Good Foundation to support India's fight against COVID 19.

Provided PPE kits, hand sanitizers, masks and other medical equipment to several health care workers in India

## Creative is a Subsidiary of EPL effective Feb 2021

- ▶ Transaction was consummated on 1<sup>st</sup> February 2021. The acquisition will help EPL further strengthen its position in the Personal Care segment.
- ▶ Enterprise Value: INR 2,539 mn
- ▶ Deal structure:
  - Purchase of 72.5% stake through cash
  - Purchase of balance 27.5% stake through issuance of 2.34 mm EPL shares to Creative founders pursuant to merger of Creative into EPL
- ▶ Creative founders will become part of EPL's senior management team after the transaction and will play role in expansion of EPL's global business.
- ▶ Merger process as per the scheme of merger approved by board of directors is ongoing.

## Looking Ahead: FY22

- 1 Sustain double digit revenue growth**
  - *Strong business development pipeline, FY22 entry 29% higher (April 2021 vs April 2020)*
- 2 Plan in place for Quarter-on-Quarter improvement in EBITDA margin through:**
  - Judicious price increases
  - Cost productivity initiatives
  - Mix improvement
- 3 Sustainability will be a key driver and EPL is leading the way for the industry.**
- 4 We are committed to delivering market leading revenue growth and capital efficient, consistent earnings growth.**
- 5 Severe Covid Wave 3 remains a concern.**



# Appendix

## FY21: Adjusted EBITDA grew 13.4% Y-o-Y & Adjusted PAT grew 34.6% Y-o-Y

(INR million)

<i>Adjustments</i>	EBITDA	PAT <sup>1</sup>
<b>Reported FY21 numbers</b>	<b>6,155</b>	<b>2,552</b>
• China Tax refund	-	-25
• TSA <sup>2</sup> related expenses	+160	+120
• One time acquisition related costs	+13	+13
• ESOP related cost	+144	+144
<b>Adjusted FY21 numbers</b>	<b>6,472</b>	<b>2,804</b>
<b>Reported FY20 numbers</b>	<b>5,600</b>	<b>2,166</b>
• China Tax refund	-	-112
• Tax benefit from one-time provision <sup>3</sup>	-	-51
• Tax amnesty	+11	+7
• TSA <sup>2</sup> related expenses	+98	+73
<b>Adjusted FY20 numbers</b>	<b>5,709</b>	<b>2,083</b>
<b>Like for Like Y-o-Y Growth (%)</b>	<b>13.4%</b>	<b>34.6%</b>

(1) PAT excluding exceptional items; (2) Transition Services Agreement (3) Tax impact of provision of INR 203 mm taken for outstanding inter company deposits



## Q4FY21: Adjusted EBITDA grew 5.3% Y-o-Y & Adjusted PAT grew 29.7% Y-o-Y

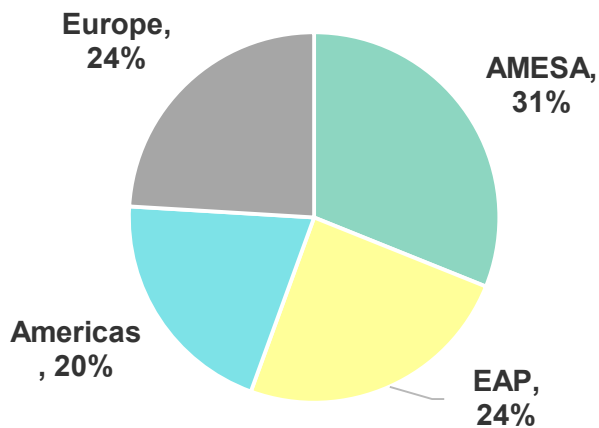
(INR million)

<i>Adjustments</i>	EBITDA	PAT <sup>1</sup>
<b>Reported Q4FY21 numbers</b>	<b>1,416</b>	<b>568</b>
• TSA <sup>2</sup> related expenses	+40	+30
• One time acquisition related costs	+13	+13
• ESOP related cost	+58	+58
<b>Adjusted Q4FY21 numbers</b>	<b>1,527</b>	<b>669</b>
<b>Reported Q4FY20 numbers</b>	<b>1,410</b>	<b>486</b>
• TSA <sup>2</sup> related expenses	+40	+30
<b>Adjusted Q4FY20 numbers</b>	<b>1,450</b>	<b>516</b>
<b>Like for Like Y-o-Y Growth (%)</b>	<b>5.3%</b>	<b>29.7%</b>

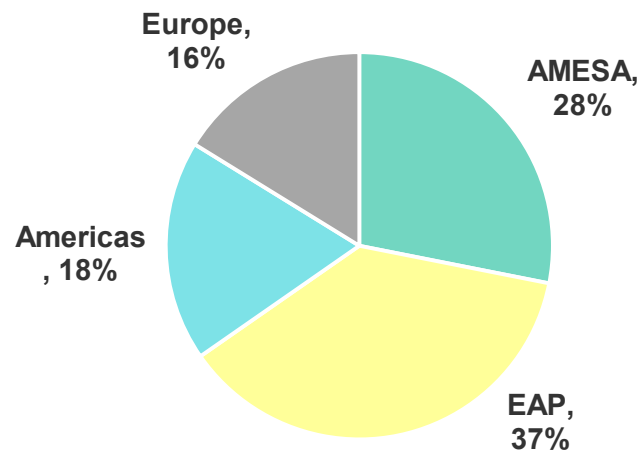
(1) PAT excluding exceptional items; (2) Transition Services Agreement

## FY21 Regional Performance – 1/2

### Revenue Split %



### EBIT Split %



- The revenue grew by 12.0% Y-o-Y, majorly driven by EAP and EUROPE.
- Despite Covid-19, all regions contributed to the strong performance for the year.
- Strong business pipeline across regions to enable continued growth momentum

## FY21 Regional Performance – 2/2

(INR million)

	Revenue	YoY Growth	EBITDA <sup>1</sup>	Margin
<b>AMESA</b>	9,934	6.1%	2,324	23.4%
<b>EAP</b>	7,820	25.5%	1,901	24.3%
<b>Americas</b>	6,521	5.4%	1,133	17.4%
<b>Europe</b>	7,686	13.5%	1,137	14.8%

(1) EBITDA is adjusted for ESOP cost for all the regions and also TSA related regions for AMESA

## Q4FY21 Performance – AMESA and EAP

(INR million)

AMESA			
Particulars	Q4FY21	Q4FY20	% change
Revenue	2,766	2,158	28.2%
EBITDA	565	526	7.4%
EBITDA %	20.4%	24.4%	
EBIT	310	281	10.3%
EBIT %	11.2%	13.0%	
EAP			
Particulars	Q4FY21	Q4FY20	% change
Revenue	1,849	1,353	36.7%
EBITDA	329	259	27.0%
EBITDA %	17.8%	19.1%	
EBIT	217	149	45.6%
EBIT %	11.7%	11.0%	

EBITDA and EBIT is adjusted for ESOP cost for all the regions and also TSA related cost for AMESA

## Q4FY21 Performance – Americas and Europe

(INR million)

Americas			
Particulars	Q4FY21	Q4FY20	% change
Revenue	1,749	1,715	2.0%
EBITDA	309	390	-20.9%
EBITDA %	17.6%	22.7%	
EBIT	207	297	-30.4%
EBIT %	11.8%	17.3%	
Europe			
Particulars	Q4FY21	Q4FY20	% change
Revenue	2,002	1,897	5.5%
EBITDA	323	258	25.3%
EBITDA %	16.1%	13.6%	
EBIT	196	135	45.3%
EBIT %	9.8%	7.1%	

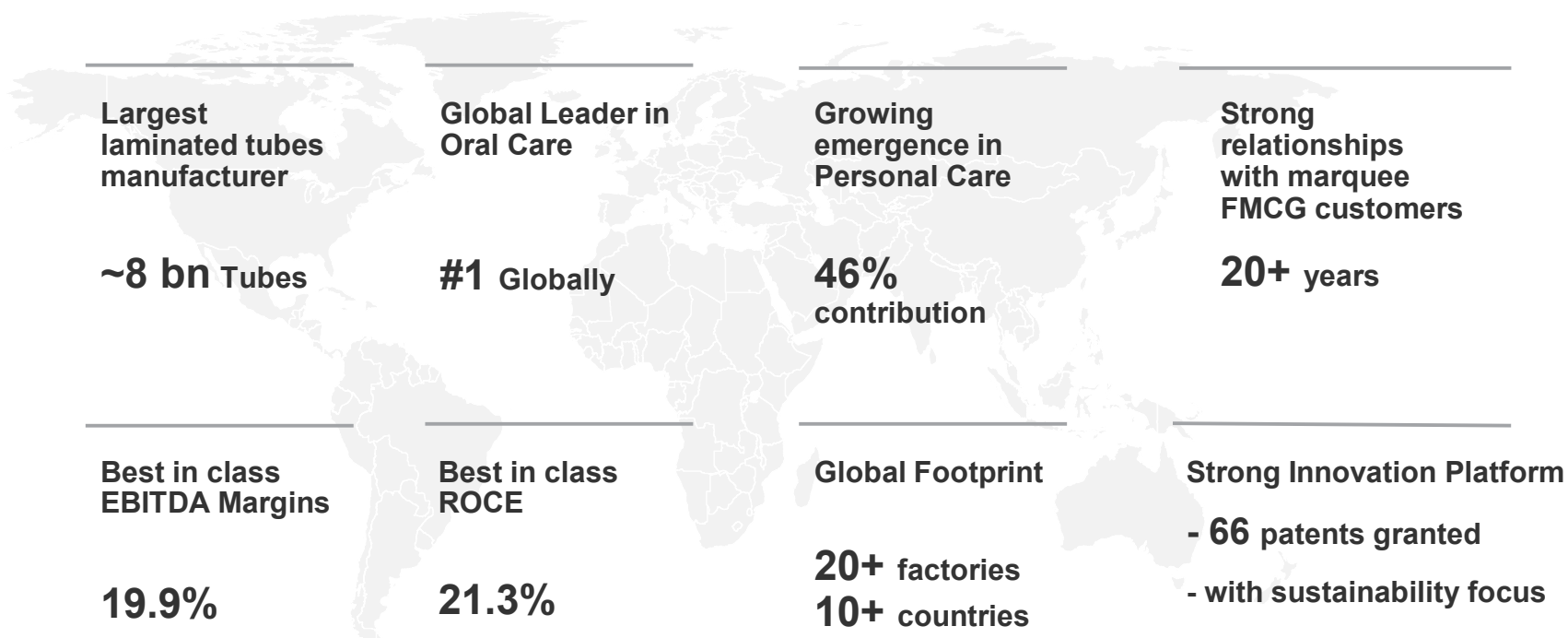
EBITDA and EBIT is adjusted for ESOP cost for all the regions.



# About EPL

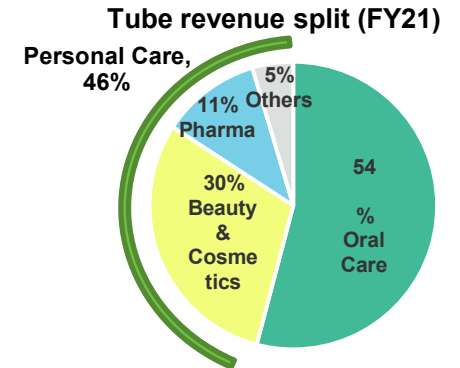
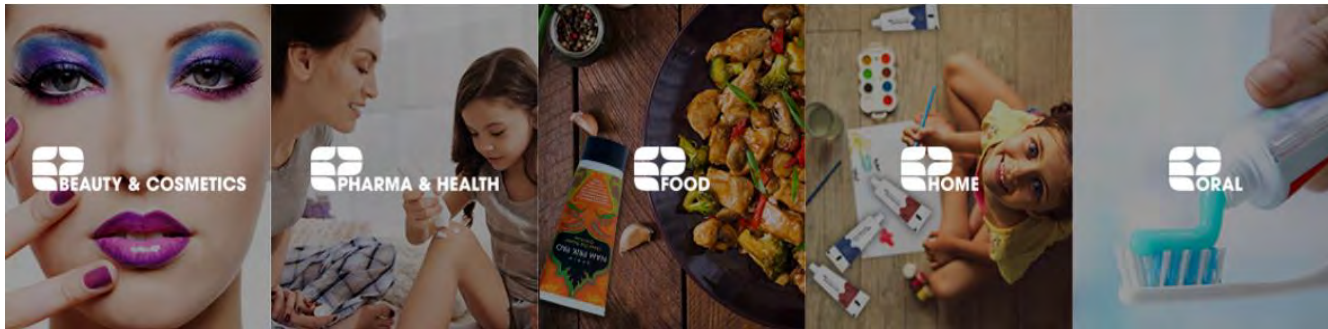
(Formerly known as Essel Propack Limited)

## EPL: Company Overview



Note: Numbers on this page are as of 31 March, 2021. ROCE on trailing twelve month basis; adjusted for INR 160 mn of Transition Services Agreement (TSA) related expense and INR 144 mn of ESOP related expenses.

## EPL Caters to Marquee Customers Across Trillion Dollar Categories





## About EPL

EPL is the largest global specialty packaging company, manufacturing laminated plastic tubes catering to the FMCG and Pharma space. Employing over 3,366 people representing over 25 different nationalities, EPL functions in ten countries through 19 state of the art facilities, and is continuing to grow every year.

EPL is the world's largest laminated tube manufacturer with units operating across countries such as USA, Mexico, Colombia, Poland, Germany, Egypt, Russia, China, Philippines and India. These facilities cater to diverse categories that include brands in Oral Care, Beauty & Cosmetics, Pharma & Health, Food, and Home, offering customized solutions through continuously pioneering first-in-class innovations in materials, technology and processes.

EPL (*Formerly known as Essel Propack Limited*)

CIN : L74950MH1982PLC028947

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