

SH/XII/2023

18th March, 2024

Corporate Relationship Department
BSE Limited
1st Floor, Phiroze Jeejeebhoy Towers
Dalal Street, Fort,
Mumbai-400 001
Scrip Code: 500040

Listing Department
National Stock Exchange of India Limited
Exchange Plaza, 5th floor,
Bandra-Kurla Complex
Bandra (East), Mumbai-400 051.
Scrip Code: CENTURYTEX

Dear Sir/ Madam,

Sub: Investor Presentation of Century Textiles and Industries Limited ('the Company')

Ref: Regulation 30 of Securities and Exchange Board of India (Listing Obligations & Disclosure Requirements) Regulations, 2015 ('Listing Regulations')

Pursuant to Regulation 30 of Listing Regulations, please find attached herewith a copy of 'Investor Presentation - December 2023' of the Company.

This is for the information of the investors and for your record.

The same is also available on Company's website: www.centurytextind.com

Thanking you,

Yours truly
For **CENTURY TEXTILES AND INDUSTRIES LIMITED**

ATUL K. KEDIA
Sr. Vice President (Legal) & Company Secretary

Encl: as above





Century Textiles and Industries Limited

TABLE OF CONTENTS



Company
Overview



Real
Estate



Pulp &
Paper



Textiles



Financials



Home of the real estate arm of Aditya Birla Group with a valuable portfolio of land parcels across premium locations

125-year-old rich legacy built under the leadership of Mr. B. K. Birla

Robust project pipeline of owned and joint development land parcels under the Real Estate division with an initial focus on 4 major cities

One of the most trusted brands in the country

Largest manufacturing facility for pulp & paper under one roof

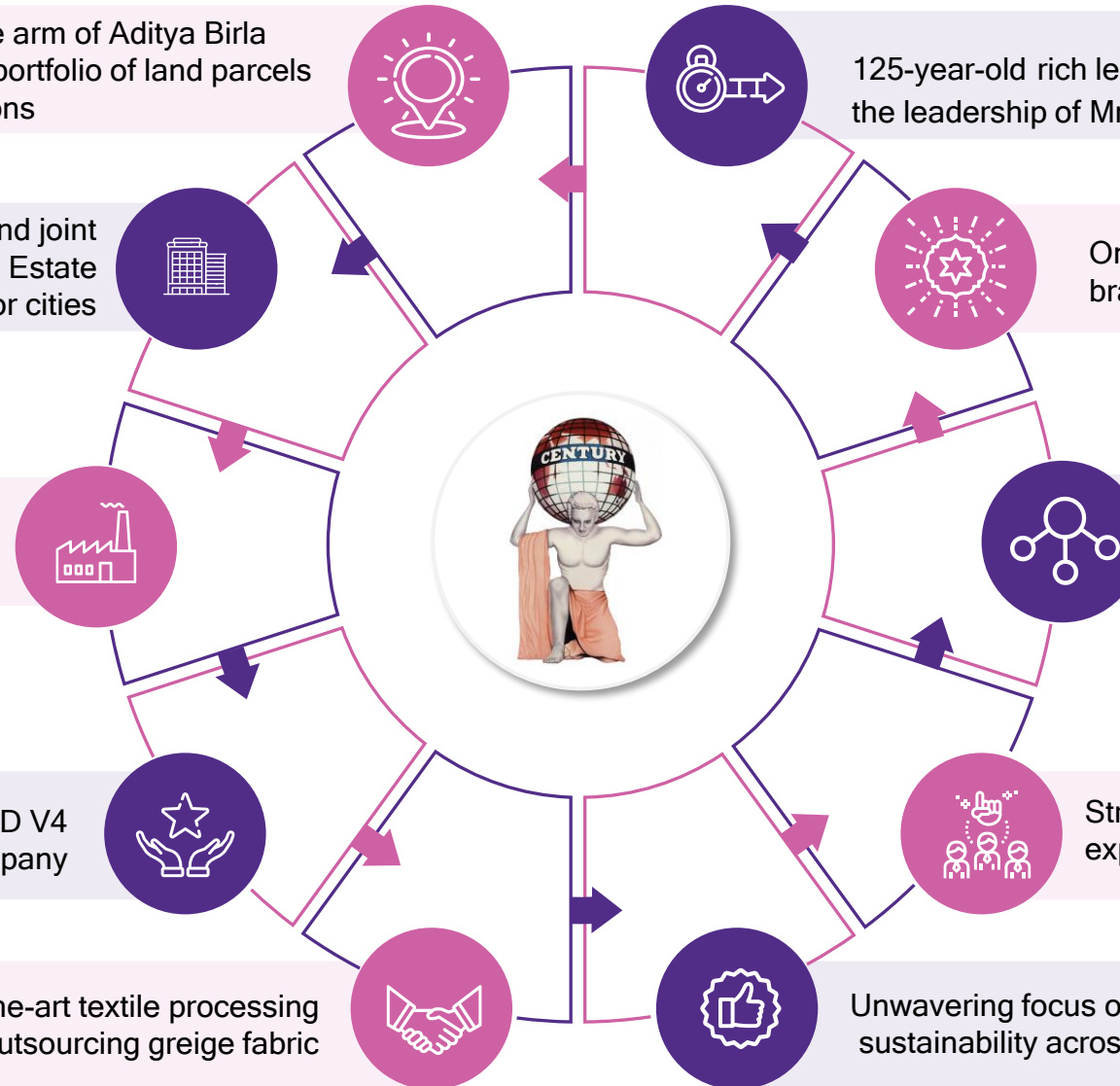
Diversified conglomerate with presence in Real Estate, Textiles and Paper

World's 2nd and India's 1st LEED V4 certified textile manufacturing company

Strong management team with experienced industry professionals

State-of-the-art textile processing house outsourcing greige fabric

Unwavering focus on quality, innovation and sustainability across all 3 business verticals



COMPANY OVERVIEW



- ▶ Incorporated in 1897, Century Textiles and Industries Limited (CTIL) has evolved from a single unit textile mill into a diversified conglomerate under the visionary leadership of Mr. B. K. Birla and is now a member of the Aditya Birla Group
- ▶ The Company's 125-year-old legacy is built on a steadfast commitment to the development of the nation. With an unwavering focus on quality and innovation, combined with agility and customer centricity, Century is in a good stead to capitalise on market opportunities

FY 2024-25 BUSINESS MIX



Birla Estates

With the aim of delivering exceptional and premium home and office spaces, the Company marked its entry into the realty sector in 2016.



Century Pulp & Paper

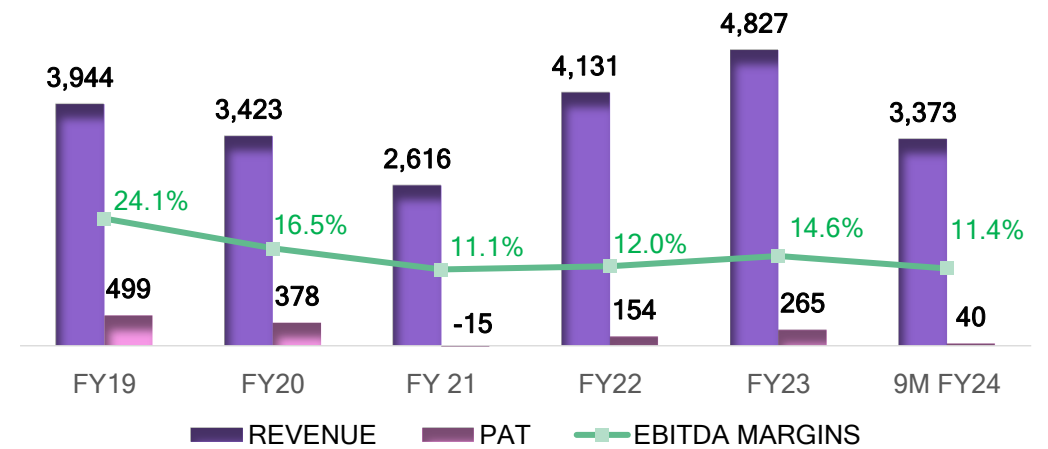
Is a producer of excellent quality writing and printing paper, and a leading manufacturer of tissue and board, as well as Rayon Grade Pulp products.



Birla Century

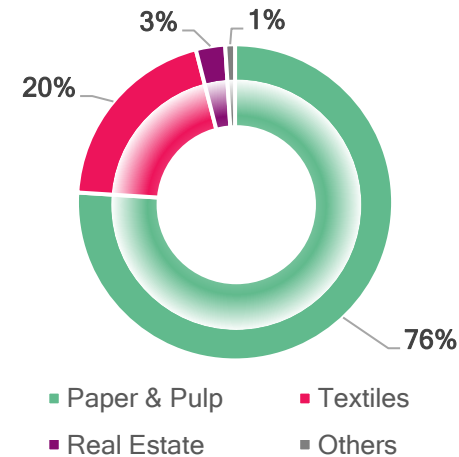
Produces a wide range of customised premium textiles that have applications in personal apparel and household linen.

Revenue* & PAT# (₹ In crores) EBITDA margin (%)

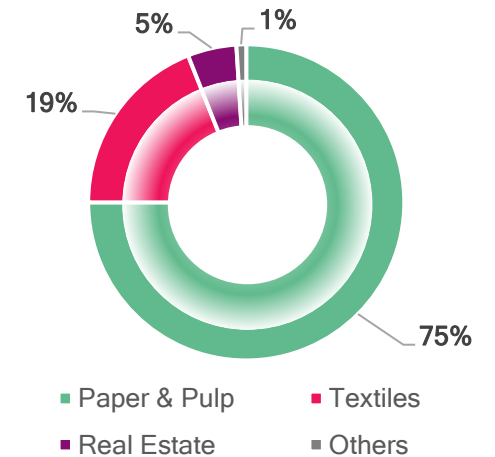


* Revenue includes: Other operating income # PAT represents net profit from continuing operations

Revenue mix - FY 2023-24



Revenue mix - 9M FY24



BOARD OF DIRECTORS



Mr. Kumar Mangalam Birla
Chairman

Mr. Kumar Mangalam Birla spearheads the iconic global conglomerate, Aditya Birla Group (ABG). Mr. Birla is the Chancellor of the Birla Institute of Technology & Science (BITS). He is Chairman of IIT-Delhi, IIM-Ahmedabad and the Rhodes India Scholarship Committee for Oxford University. He serves on the London Business School's Asia Pacific Advisory Board and is an Honorary Fellow of the London Business School. A qualified Chartered Accountant, Mr. Birla also holds a management degree from the London Business School.



Smt. Rajashree Birla
Non-Executive Director

As Chairperson of the Aditya Birla Centre for Community Initiatives and Rural Development, Mrs. Rajashree Birla spearheads the social and community welfare activities across 40 companies in the Aditya Birla Group (ABG). The centre's initiatives in education, healthcare, sustainable livelihoods and social reform have benefitted more than 3000 villages and created a positive difference in the lives of seven million people. Mrs. Birla is an iconic leader and a role model for those who aspire to bring about a positive transformation in society.



Mr. R. K. Dalmia
Managing Director,
Century Textiles &
Industries Limited

A chartered accountant by qualification, Mr. Dalmia has been with the Group for the last four decades. Under his stewardship, the mill went on to win numerous accolades from the textile industry. Mr. Dalmia played a vital role in setting up two new divisions of the Company, i.e. Century Yarn and Century Denim in 1993 and 1997, respectively. He was also instrumental in the establishment of a new ultra-modern textile mill near Bharuch in Gujarat in 2008 with 300 looms and over one lac spindles.

Mr. Sohanlal K. Jain
Independent Director

Ms. Preeti Vyas
Independent Director

Mr. Rajan A. Dalal
Independent Director

Mr. Yazdi. P. Dandiwala
Independent Director

KEY MANAGERIAL PERSONNEL



Mr. K. T. Jithendran
Chief Executive
Officer & Managing
Director, Birla Estates

Mr. K. T. Jithendran has over 26 years of work experience in the realty sector. Prior to joining Birla Estates, he was involved with Godrej Properties Limited (GPL) as an Executive Director. He has led most functions within the company while managing growth as well as building a strong talent team. A civil engineer from IIT Kharagpur, Mr. Jithendran also completed postgraduate diploma in Management from IIM Kolkata and an advanced management programme from Harvard Business School.



Mr. Vijay Kaul
Chief Executive
Officer (CEO),
Century Pulp &
Paper

Mr. Vijay Kaul has worked with the Aditya Birla Group for close to four decades, during which he has handled many challenging assignments in manufacturing and in sales & marketing. He has led manufacturing units and, set up various greenfield projects and has deep experience of commercialising new technologies. He holds a Bachelor's Degree in Engineering, and he has also pursued various management programmes at leading institutions such as Harvard Business School and Wharton School of Management. He has also served as a member of IIM Indore Board and also on various committees of CII and FICCI.



Mr. Vinod Chaturvedi
Chief Human
Resources Officer

As CHRO of Century, Mr. Vinod Chaturvedi orchestrates and drives HR strategies in sync with business objectives. In his prior roles within the Aditya Birla Group, he has held several significant positions, including CHRO - Mining Business, Business head - Noble Ferro Alloys Business and ABG Employee Relations Head (CoE) among others. With an illustrious career spanning over 33 years, he possesses a wealth of experience in HR & ER, coupled with expertise in areas such as Change Management, M&A, Organisational Redesign, and Cultural integration. With post graduations in Business Administration, Industrial relations and Psychology, his track record includes successfully leading business and cultural integrations as well as seamlessly merging People, Processes, and Technology.

KEY MANAGERIAL PERSONNEL



Mr. Snehal Shah
Chief Financial
Officer (CFO)

Mr. Snehal Shah is a seasoned management professional specialising in business strategy with a cumulative experience of over 30 years in operations, business processes, risk management, MIS, administration, vendor management, and team building. His expertise spans across financial services, metals, cement, carbon black, textiles, chemicals and refineries. A chartered accountant by qualification, Mr. Shah headed the Corporate Management Services division at Aditya Birla Group for over four years; before donning the mantle of the CFO at Century Textiles and Industries Limited



Mr. Atul K. Kedia
Sr. Vice President
(Legal) and
Company
Secretary

Mr. Atul K. Kedia is the Vice President (Legal), Company Secretary and Compliance Officer of the company. A commerce and law graduate, he is a member of the Institute of Company Secretaries of India. He has been with the organisation for more than 30 years. He possesses vast experience in the field of investor relations, apart from secretarial and legal matters.

OUR JOURNEY



The Century Spinning & Manufacturing Co. Limited founded as a one-plant company to process cotton

1897



The Company came under the fold of Birla management and Shri. B. K. Birla was roped in to look after the affairs of the Company

1951



Century Rayon was inaugurated

1956



Viscose tyre yarn/cord plant was established in collaboration with Algemene Kuntzidjeume NV, Netherlands and Glanzstoff AG, Germany

1963



Diversification into chemicals

Establishment of an additional caustic soda plant with a mercury cell process

1964



Foray into the cement sector with the launch of the Birla Gold Portland brand and a 0.6 MTPA Baikunth plant

1974



Demerger of the Cement Division; merged with UltraTech

2019



Rights and responsibilities to Manage, Operate, Use and Control the Century Rayon Business granted to Grasim Industries Limited for 15 years against an advance lease amount of ₹ 600 Crores

2018



Forayed into the realty sector with Birla Estates

Launched LifeDesigned workspaces - Birla Aurora and Birla Centurion

2016



A state-of-the-art, 100-acre textile mill set-up at Jhagadia in Bharuch, Gujarat

Textile business reinstated after closure of mills in Mumbai

2008



Company renamed as 'Century Textiles and Industries Limited'

1987



Diversification into the pulp & paper business with the 400-acre Lalkuan plant

1984



ADITYA BIRLA GROUP AT A GLANCE



METALS



CEMENT



CARBON BLACK



FASHION & RETAIL



RENEWABLE



PAINTS



CHEMICALS



FINANCIAL SERVICES



REAL ESTATE



PULP & FIBRE



TELECOM



- Global Top 3
- India Top 3
- Future Growth Engine

USD 60 billion
Conglomerate

140K+
Employees

36+
Countries

<1x
Net Debt to EBITDA

300 million+
Loyal Customer Base

200K+
Dealers & Partners

60+
Mergers & Acquisitions
(M&A) and JVs
Undertaken

130+
State-of-the-Art Global
Manufacturing
Facilities

USD 70 billion
Capital Invested by the
Group across Businesses
over the last 15-Years



The Real Estate Arm of the Aditya Birla Group



Projects with a revenue potential of more than ₹ 45,000 Crores (~23 million sqft) under development (including presales of ~₹ 6,280 Crores)

- ▶ Real estate venture of the Aditya Birla Group, Birla legacy of trust, excellence and leadership
- ▶ 100% wholly owned subsidiary of Century Textiles and Industries Limited
- ▶ Focus on 4 key markets in India - MMR, Bengaluru, NCR and Pune, to deliver premium real estate projects across residential, commercial and mixed-use segments
- ▶ Developing land parcels both through outright purchases as well as asset-light joint ventures. Also developing its own land parcels



Aims to be among the top real estate companies in India with a vision to transform the perception of the Indian real estate sector by delivering an exceptional experience and creating value; at every level, for every stakeholder.

GEOGRAPHICAL PRESENCE



1

- Birla Vanya, Kalyan
- Birla Niyaara, Worli
- Walkeshwar, South Mumbai
- Birla Centurion, Worli (C)
- Birla Aurora, Worli (C)
- Thane, MMR

2

- Wellesley Road, Central Pune

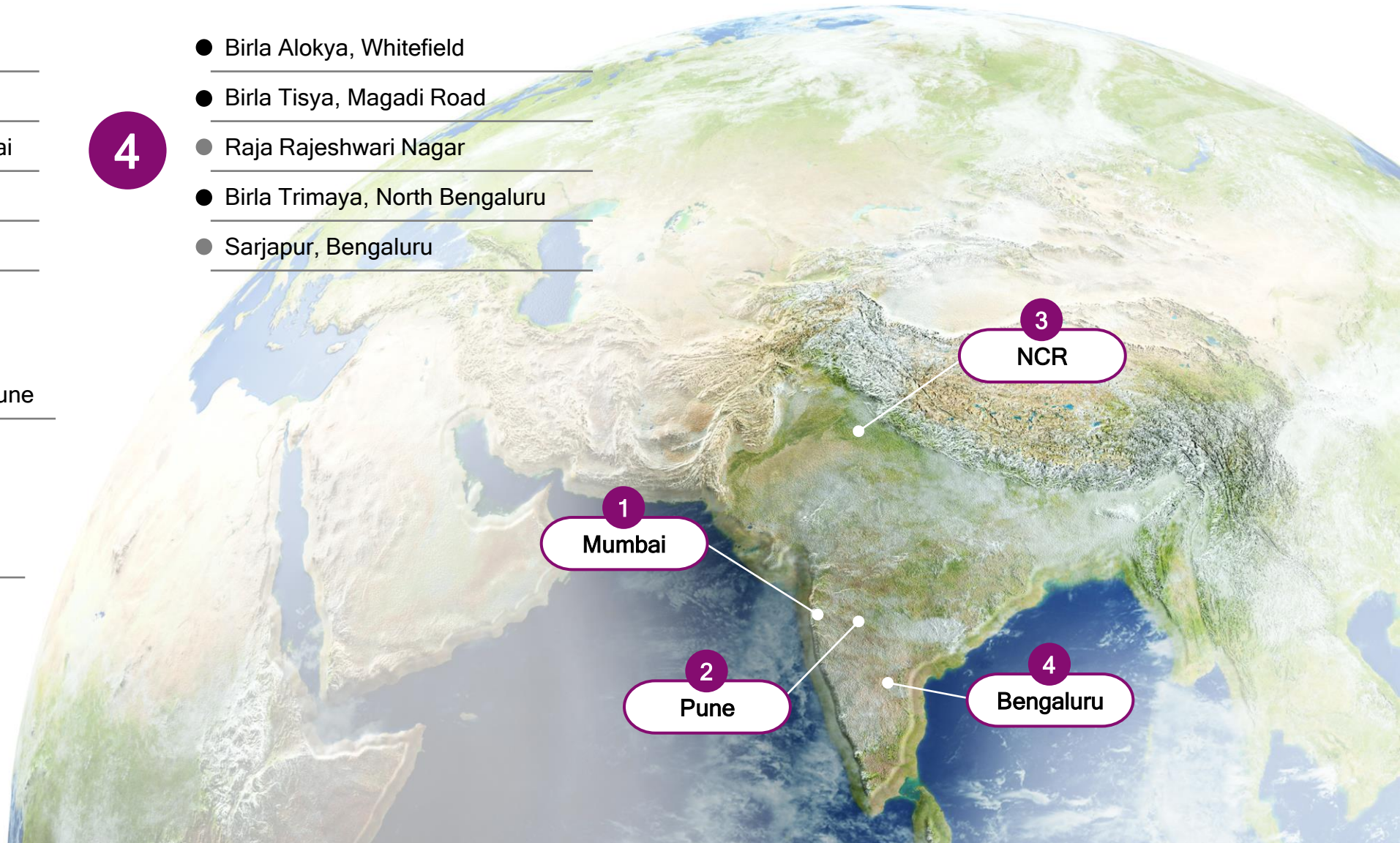
3

- Birla Navya, Golf Course Extension Road
- Mathura Road, Delhi

- Launched
 - Upcoming
- (C) - Commercial

4

- Birla Alokya, Whitefield
- Birla Tisya, Magadi Road
- Raja Rajeshwari Nagar
- Birla Trimaya, North Bengaluru
- Sarjapur, Bengaluru



1
Mumbai

2
Pune

3
NCR

4
Bengaluru

LAUNCHED RESIDENTIAL PROJECTS



**Birla Vanya,
(Kalyan)**



Launch Period
Q1 FY19-20



Land Area
22 acres



Booking Value (PTD)
₹ 807 Crores



Collection Value (PTD)
₹ 427 Crores



Total Saleable Area
13.3 lakhs sqft



Share
100%



Saleable Area
Launched (PTD)
13.3 lakhs sqft



Saleable Area
Sold (PTD)
10.2 lakhs sqft (77%)



**Birla Alokya,
(Whitefield,
Bengaluru)**



Launch Period
Q3 FY19-20



Land Area
8 acres



Booking Value (PTD)
₹ 379 Crores



Collection Value (PTD)
₹ 218 Crores



Total Saleable Area
5.5 lakhs sqft



Share
100%



Saleable Area
Launched (PTD)
5.5 lakhs sqft



Saleable Area
Sold (PTD)
5.3 lakhs sqft (97%)



**Birla Navya,
(Golf Course
Extension,
Gurugram)**



Launch Period
Q3 FY 20-21



Land Area
48 acres



Booking Value (PTD)
₹ 1,526 Crores



Collection Value (PTD)
₹ 510 Crores



Total Saleable Area
18.5 lakhs sqft
(Ph 1+2+3-11.66)



Share
50%



Saleable Area
Launched (PTD)
11.7 lakhs sqft



Saleable Area
Sold (PTD)
11.3 lakhs sqft (97%)

All PTD numbers are as on Dec-23

*All PTD numbers are as on Dec-23

LAUNCHED RESIDENTIAL PROJECTS



Birla Niyaara, (Worli, Mumbai)



Launch Period
Q4 FY21-22



Land Area
14 acres



Booking Value (PTD)
₹ 2,528 Crores



Collection Value (PTD)
₹ 763 Crores



Total Saleable Area
24.8 lakhs sqft
(Residential)



Share
100%



Saleable Area
Launched (PTD)
9.1 lakhs sqft



Saleable Area
Sold (PTD)
7.4 lakhs sqft (81%)



Birla Tisya, (Rajajinagar, Bengaluru)



Launch Period
Q3 FY21-22



Land Area
5 acres



Booking Value (PTD)
₹ 565 Crores



Collection Value (PTD)
₹ 262 Crores



Total Saleable Area
6.5 lakhs sqft



Share
40%



Saleable Area
Launched (PTD)
6.5 lakhs sqft



Saleable Area
Sold (PTD)
5.9 lakhs sqft (90%)



Birla Trimaya, (Devanahalli, Bengaluru)



Launch Period
Q2 FY23-24



Land Area
52 acres



Booking Value (PTD)
₹ 481 Crores



Collection Value (PTD)
₹ 73 Crores



Total Saleable Area
36.2 lakhs sqft



Share
47%



Saleable Area
Launched (PTD)
7.2 lakhs sqft

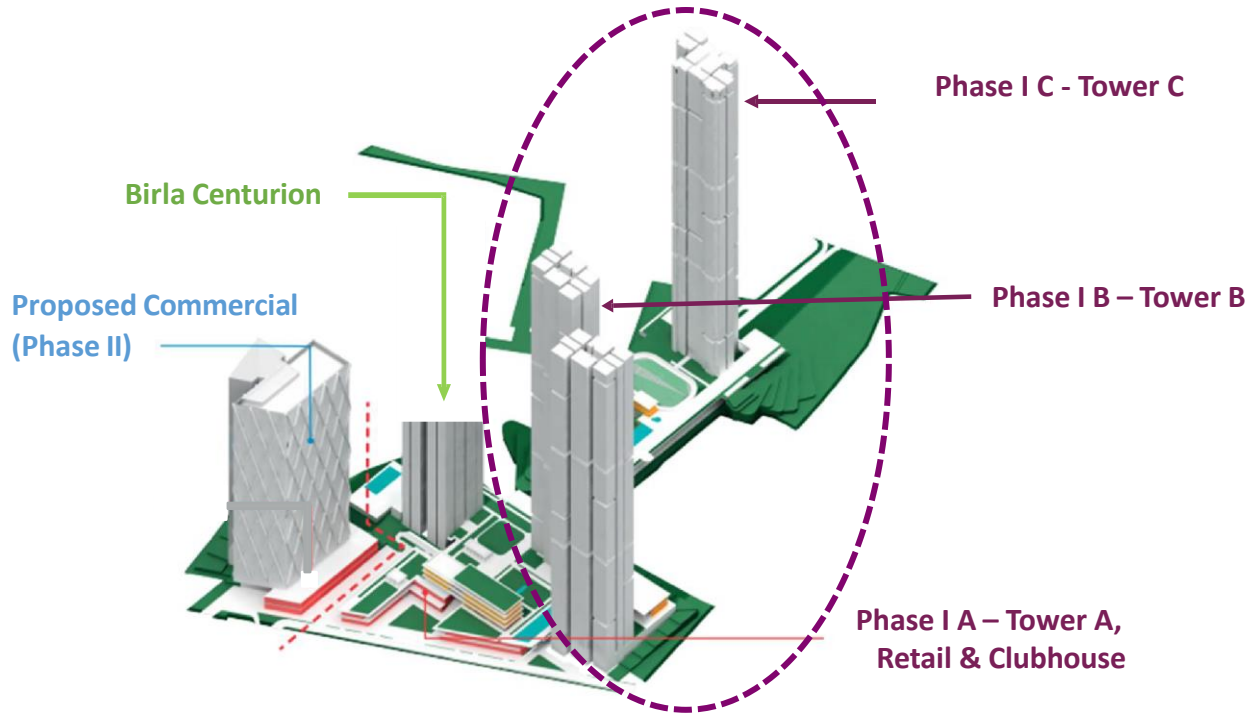





Saleable Area
Sold (PTD)
7.1 lakhs sqft (99%)

*All PTD numbers are as on Dec-23

Overall there is a saleable area potential of 5 million sqft in Worli. Breakup of the same is as follows:

- Birla Niyaara, (Worli, Mumbai)



 Towers	 Area	 Status
A	0.8	Launched
B	0.9	Launched
C	0.7	Yet to be Launched

- Balance commercials/residential potential in Worli East of 1 million sqft
- Worli West has a potential of 1.5 million. sqft
- Since its launch in Feb 2022, 87% of the launched inventory of Tower A is sold
- Prices have appreciated > 33% since its launch
- The masterplan of the project is designed and planned by globally recognised architects and designers as follows:
 - Foster + Partners, UK
 - Sasaki Associates, USA
 - LERA, USA
 - Coopers Hill, Singapore
 - BPI Design, Singapore
 - Priedmann, UAE

UPCOMING PROJECTS



Raja Rajeshwari Nagar, Bengaluru



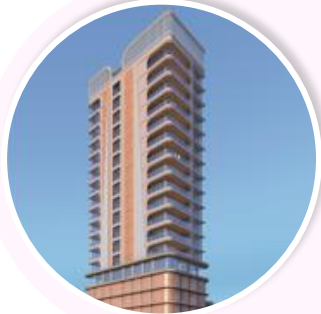
Land Area
10 acres (own)



Total Saleable Area
10.1 lakhs sqft



Estimated Gross Development Value (GDV, ₹)
983 Crores



Walkeshwar, Mumbai



Land Area
0.21 acres (own)



Total Saleable Area
0.6 lakhs sqft



Estimated Gross Development Value (GDV, ₹)
573 Crores



Wellesley Road, Pune



Land Area
6 acres (own)



Total Saleable Area
15.4 lakhs sqft



Estimated Gross Development Value (GDV, ₹)
2,420 Crores

UPCOMING PROJECTS



Sarjapur, Bangalore



Land Area
29 acres (Own)



Total Saleable Area
28.7 lakhs sqft



Estimated Gross Development
Value (GDV, ₹)
2,726 Crores



Thane, Mumbai



Land Area
30.5 acres (Own)



Total Saleable Area
53.9 lakhs sqft



Gross Development Value
(GDV, ₹)
7,648 Crores



Mathura Road, Delhi



Land Area
6.8 acres (JV - India
Hume Pipes)



Total Saleable Area
14.2 lakhs sqft



Gross Development Value
(GDV, ₹)
2,718 Crores

PROJECT LAUNCHES

● Launched/To be Launched ● Ongoing ● Delivery



FY 20
GDV - ₹ 1,500 Crores

Birla Vanya
TSA - 13.3 lakhs sqft

Birla Alokya
TSA - 5.5 lakhs sqft

FY 21
GDV - ₹ 600 Crores

Birla Navya (P1)
TSA - 5.7 lakhs sqft

Birla Vanya
TSA - 13.3 lakhs sqft

Birla Alokya
TSA - 5.5 lakhs sqft

FY 22
GDV - ₹ 4,000 Crores

Birla Niyaara (P1)
TSA - 9 lakhs sqft

Birla Tisya
TSA - 6.5 lakhs sqft

Birla Navya (P1)
TSA - 5.7 lakhs sqft

Birla Vanya
TSA - 13.3 lakhs sqft

Birla Alokya
TSA - 5.5 lakhs sqft

FY 23
GDV - ₹ 950 Crores

Birla Navya (P2)
TSA - 3.7 lakhs sqft

Birla Niyaara (P1)
TSA - 9 lakhs sqft

Birla Tisya
TSA - 6.5 lakhs sqft

Birla Navya (P1)
TSA - 18.8 lakhs sqft

Birla Vanya
TSA - 13.3 lakhs sqft

Birla Alokya
TSA - 5.5 lakhs sqft

FY 24e
GDVe - ₹ 7,500 Crores

Birla Niyaara (P2)

Walkeshwar, MMR

Devanahalli, B'lore

RR Nagar, B'lore

Birla Navya (P2)
TSA - 3.7 lakhs sqft

Birla Niyaara (P1)
TSA - 9 lakhs sqft

Birla Tisya
TSA - 6.5 lakhs sqft

Birla Navya (P1)
TSA - 18.8 lakhs sqft

Birla Vanya
TSA - 13.3 lakhs sqft

Birla Alokya
TSA - 5.5 lakhs sqft

FY 25e
GDVe - ₹ 9,500 Crores

Wellesley Rd.,
PuneSarjapur, B'loreBirla
Mathura Road Birla Navya
(P3) Birla Trimaya (P2)

Birla Niyaara (P2)

Walkeshwar, MMR

Devanahalli, B'lore

RR Nagar, B'lore

Birla Navya (P2)
TSA - 3.7 lakhs sqft

Birla Niyaara (P1)
TSA - 9 lakhs sqft

Birla Tisya
TSA - 6.5 lakhs sqft

Birla Navya (P1)
TSA - 18.8 lakhs sqft

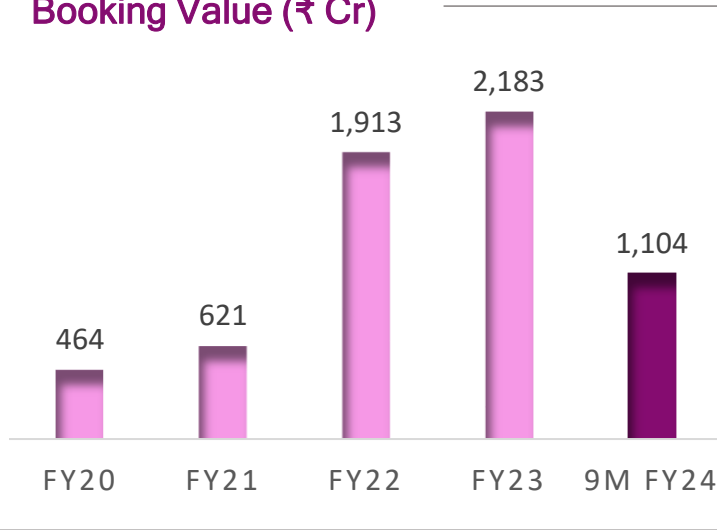
Birla Vanya
TSA - 13.3 lakhs sqft

Birla Alokya
TSA - 5.5 lakhs sqft

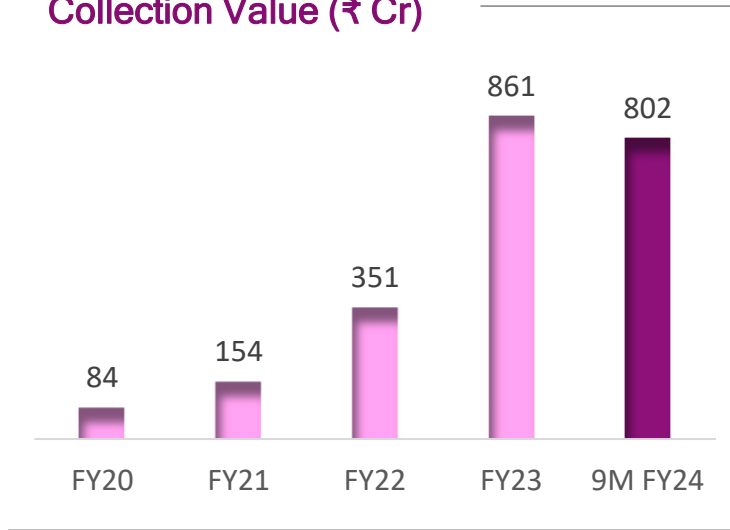
KEY QUARTERLY PERFORMANCE INDICATORS



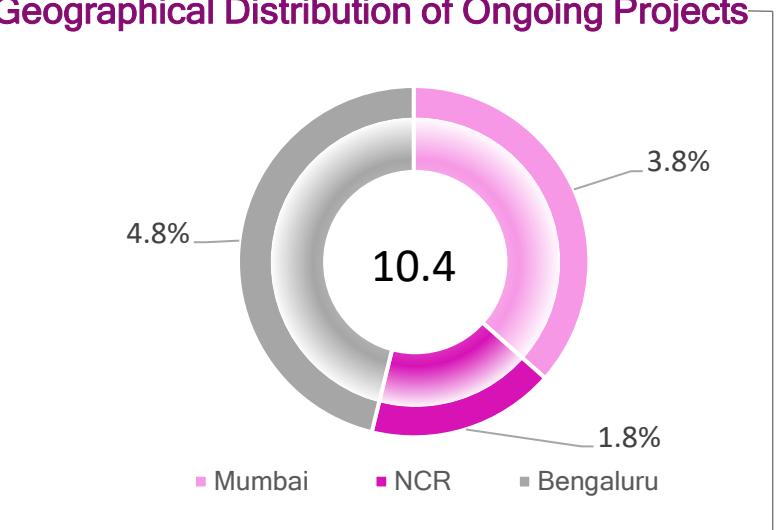
Booking Value (₹ Cr)



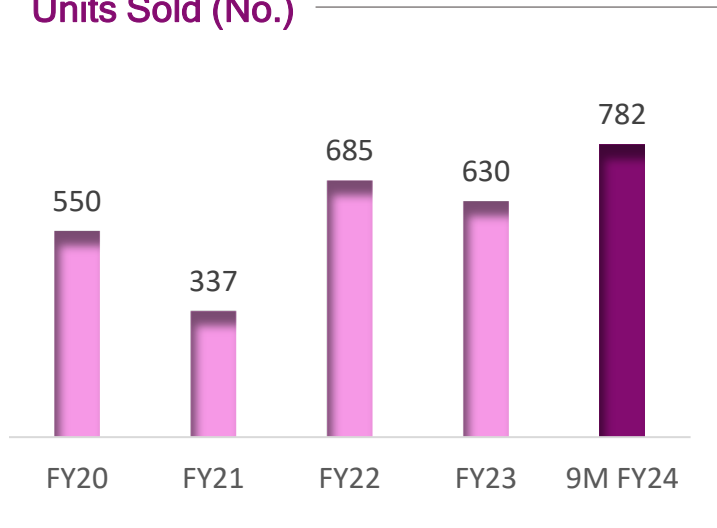
Collection Value (₹ Cr)



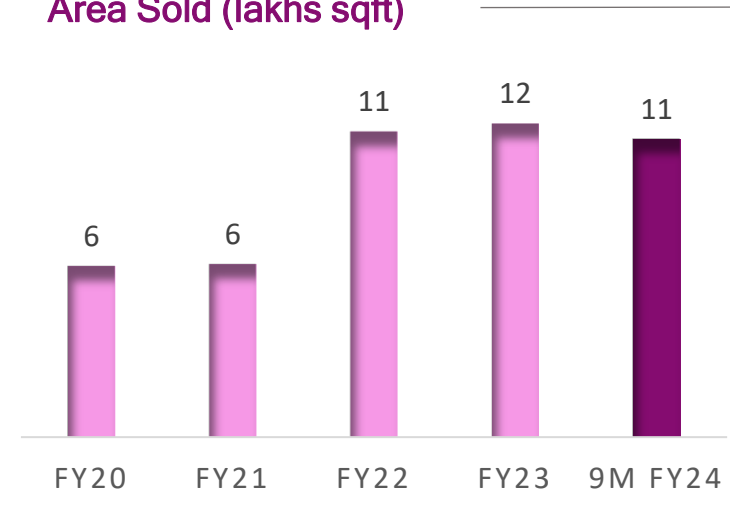
Geographical Distribution of Ongoing Projects



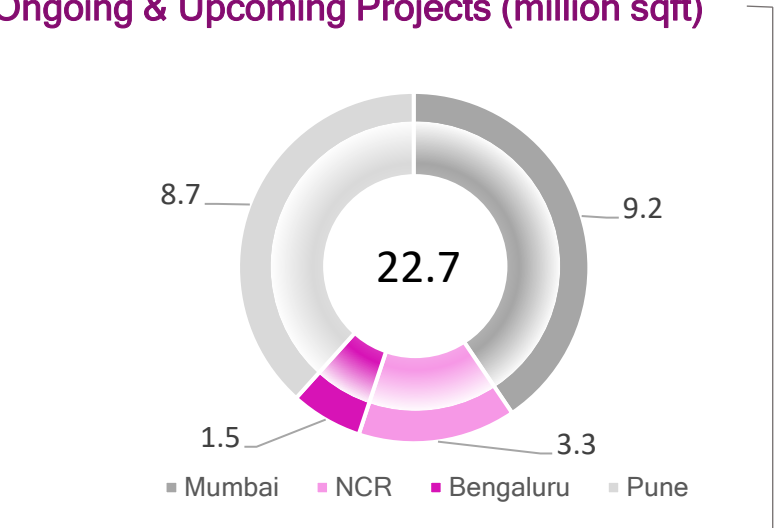
Units Sold (No.)



Area Sold (lakhs sqft)



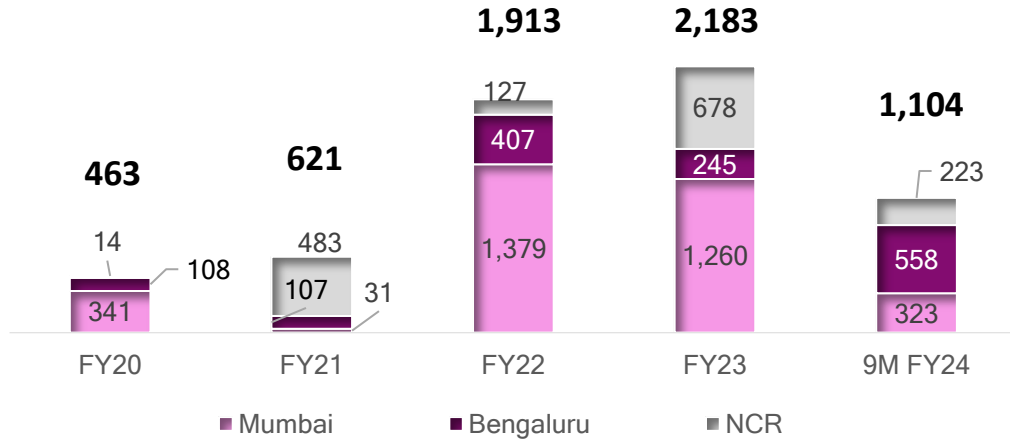
Ongoing & Upcoming Projects (million sqft)



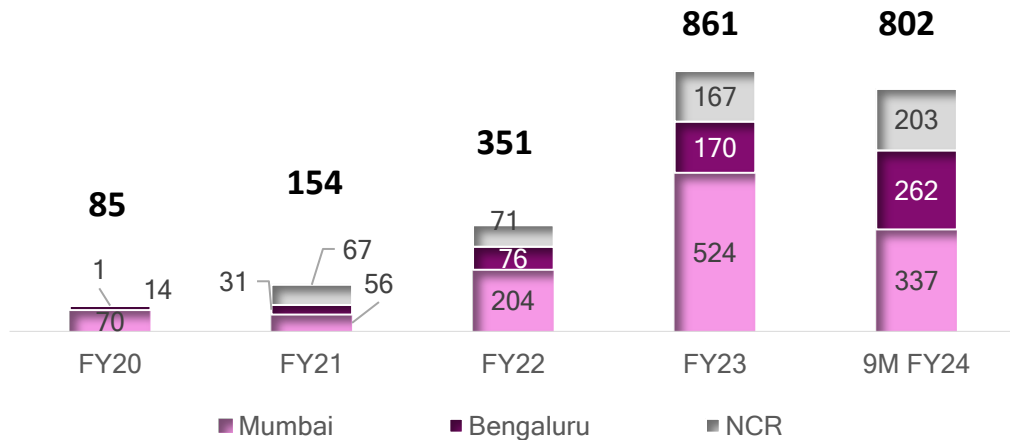
SUMMARY (REGION-WISE INFORMATION)



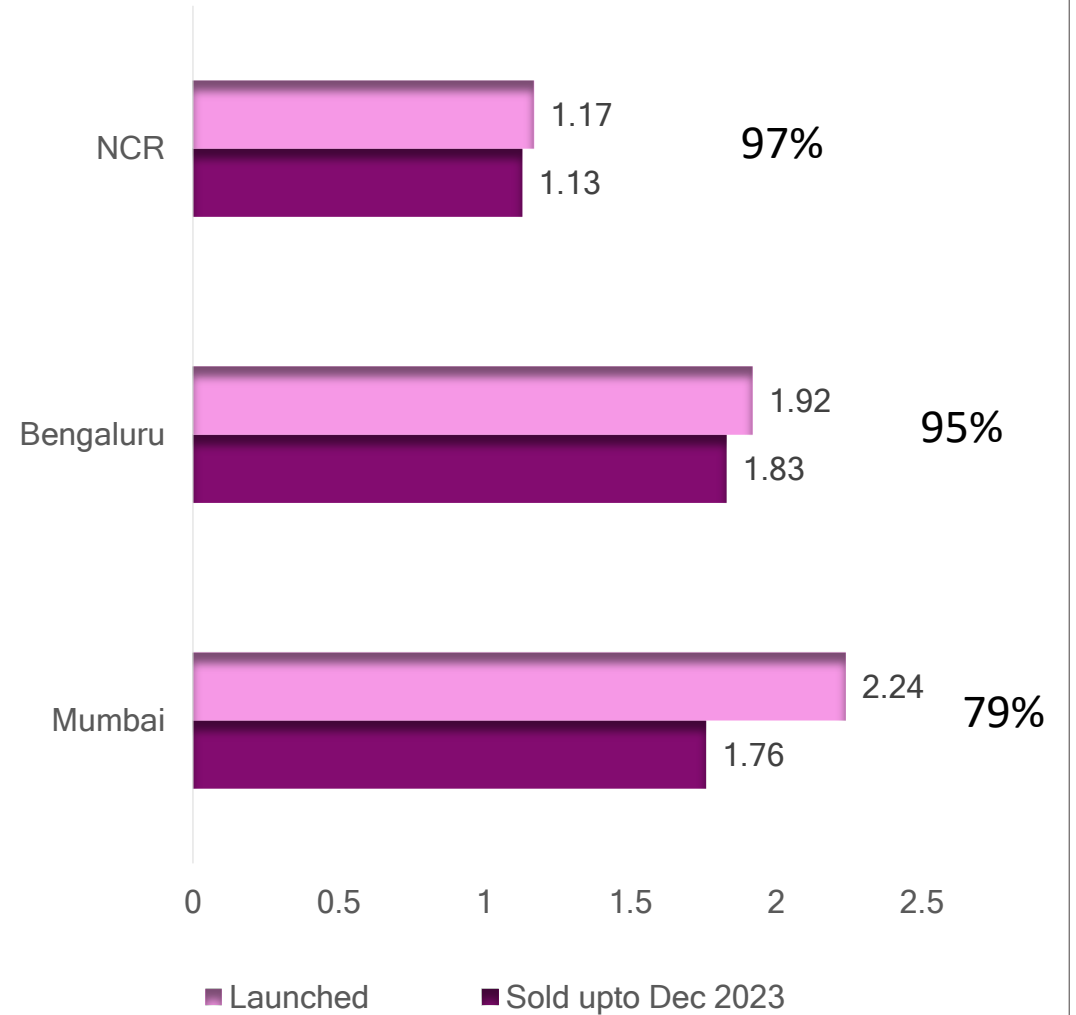
City-Wise Historical Pre-sales (in Crores)



City-Wise Historical Collections (in Crores)



Area (million sqft)



EXISTING COMMERCIAL PROJECTS



**Birla
Aurora**



Land Area
Leasable (in sqft)
2.4 lakhs



Annual Lease Rental
FY 2023-24 (9M)
₹ 47.1 Cr.



Location
**Dr. Annie Besant Road,
Century Bazaar, Mumbai**



Annual Lease Rental
FY 2022-23 (12M)
₹ 57.1 Cr



**Birla
Centurion**



Land Area
Leasable (in sqft)
3.2 lakhs



Annual Lease Rental
FY 2023-24 (9M)
₹ 47.6 Cr.



Location
**Pandurang Budhkar
Marg, Century Mills
Compound, Mumbai**



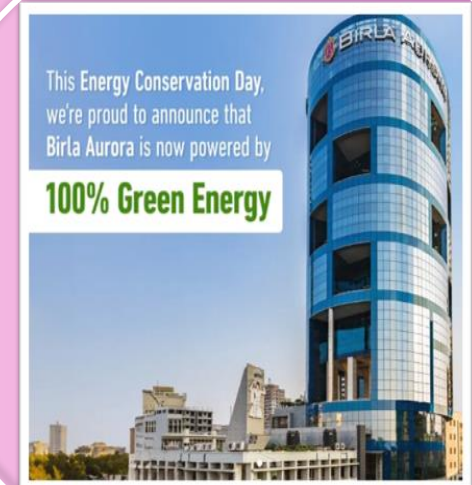
Annual Lease Rental
FY 2022-23 (12M)
₹ 57.7 Cr



ENVIRONMENT



Birla Aurora has completed a **100% transition** and **Birla Centurion** has achieved a **38% shift to green energy**, resulting in a **43% reduction in CO₂ emissions** in our commercial properties.





SOCIAL



A 5-day training, testing and certification programme organised for workers from different trades, such as carpenter, fitter, scaffolder, welder and electrician, was conducted by CIDC-trained experts. The programme, aimed to enhance the capabilities of the workers, improving their overall work performance and employability. This Certificate is valid for their visa approval to work in Gulf countries.



GOVERNANCE - ROBUST COMPLIANCES OF ALL STATUTORY REGULATIONS

AWARDS & CERTIFICATIONS



Green Project of the Year

National Infrastructure & Construction Awards



Green Building Project of the Year

Times Network Presents National Awards for Marketing Excellence - For Excellence in Real Estate & Infrastructure



Commercial Property of the Year

DNA Presents Real Estate & Infrastructure Round Table & Awards



Commercial Property of the Year

ET Now Presents Real Estate Awards



Green Building Project of the Year

ET Now Presents Real Estate Awards



Project Launch of the Year

The 11th Realty+Excellence Awards 2019 West Zone



Innovative Marketing Campaign of the Year

DNA Presents Real Estate & Infrastructure Round Table & Awards



Iconic Marketing Campaign of the Year

Times Realty Icons Awards



ACE Alliance Award 2019 by SAP

For Customer Excellence and Delivery in SAP Product Support



Iconic Emerging Developer, India

Mid-Day Real Estate & Infrastructure Icons



Best Real Estate Company

Global Real Estate Congress Real Estate Awards



Best Brand Marketing

Global Real Estate Congress Real Estate Awards

AWARDS & CERTIFICATIONS



Emerging Developer of the Year (North) - Birla Estates

RE/MAX Presents Estate Awards



Luxury Project of the Year (North) - Birla Navya

RE/MAX Presents Estate Awards



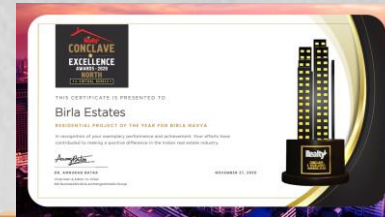
Iconic Project of the Year - Birla Alokya

Realty+ Conclave & Excellence Awards 2020 (South)



Birla Estates

CIDC Partners in Progress Trophy - 2022



Residential Project of the Year - Birla Navya

Realty+ Conclave & Excellence Awards 2020 (North)



Birla Vanya

13th CIDC Vishwakarma Awards - 2022



Birla Alokya

National Safety Council of India - Safety Awards 2021



Birla Vanya

National Safety Council of India - Safety Awards 2021



Birla Vanya

Greentech Effective Safety Culture Award - 2021



Birla Alokya

National Safety Council of India



Commercial Birla Birla Vanya

RoSPA - Health and Safety Awards 2022



Pulp & Paper

Flag Bearer in
Paper Industry



PULP & PAPER - EXECUTIVE SUMMARY

- ▶ Century Pulp & Paper is the largest single-location integrated pulp & paper producer of renewable, recyclable and eco-friendly, excellent quality writing and printing paper, tissue and board, as well as Century Green Pulp (CGP) products
- ▶ Established in 1984, with a relentless focus on quality, the Company manufactures international-grade products and is now a leading player in India's pulp and paper industry

PRODUCT PORTFOLIO



WRITING & PRINTING PAPER

We manufacture a versatile range of writing and printing paper products like copiers for photocopying, maplithos for notebooks and textbooks and of the industrial papers for packaging, insulation and wrapping purposes. We plan to aggressively ramp up production capacity to 930 TPD in next 3 years.



TISSUE

Established in 2009 and expanded in 2021 to an overall rated capacity of 200 TPD, we are among the largest and most advanced manufacturers of tissue products, having a 44% share of the virgin domestic market. We manufacture virgin tissues in the facial, towel, napkin, and toilet tissue categories, with a specialty in jumbo soft tissue paper rolls.



MULTI LAYER PACKAGING BOARD

We manufacture various multilayer packaging boards, like FBB and SBS, used in the packaging of pharmaceutical and FMCG products, as well as coated boards for food and beverage products. We plan to ramp up our production capacity to over 600 TPD in the next 3 years.



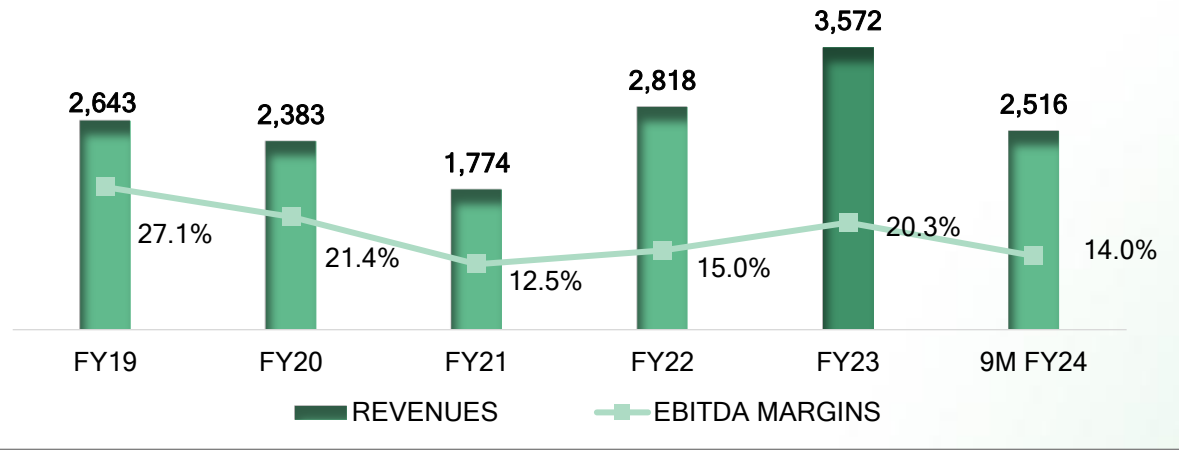
CENTURY GREEN PULP

Century Green Pulp is made from Bagasse, which is a fibrous matter left over after crushing of sugarcane. Mostly used in molded packaging for electronics, cosmetics and in tableware, it serves as an eco-friendly alternative to plastic and thermocol, offering a sustainable solution with significantly reduced environmental impact. Century has developed a unique way of converting biowaste to high GSM dry sheets of eco-friendly CGP products.

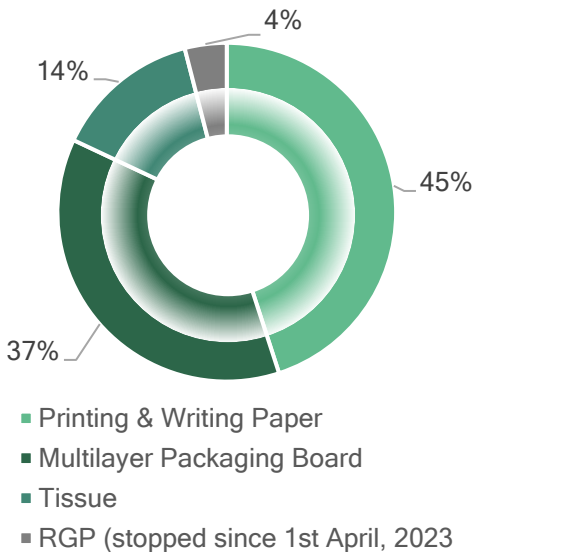
PULP & PAPER - EXECUTIVE SUMMARY



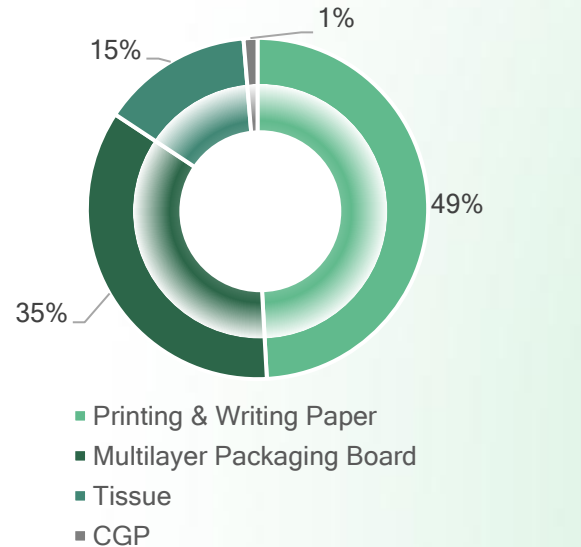
Turnover (₹ in Crores) & EBITDA Margins (%)



Revenue Mix - 9M FY23

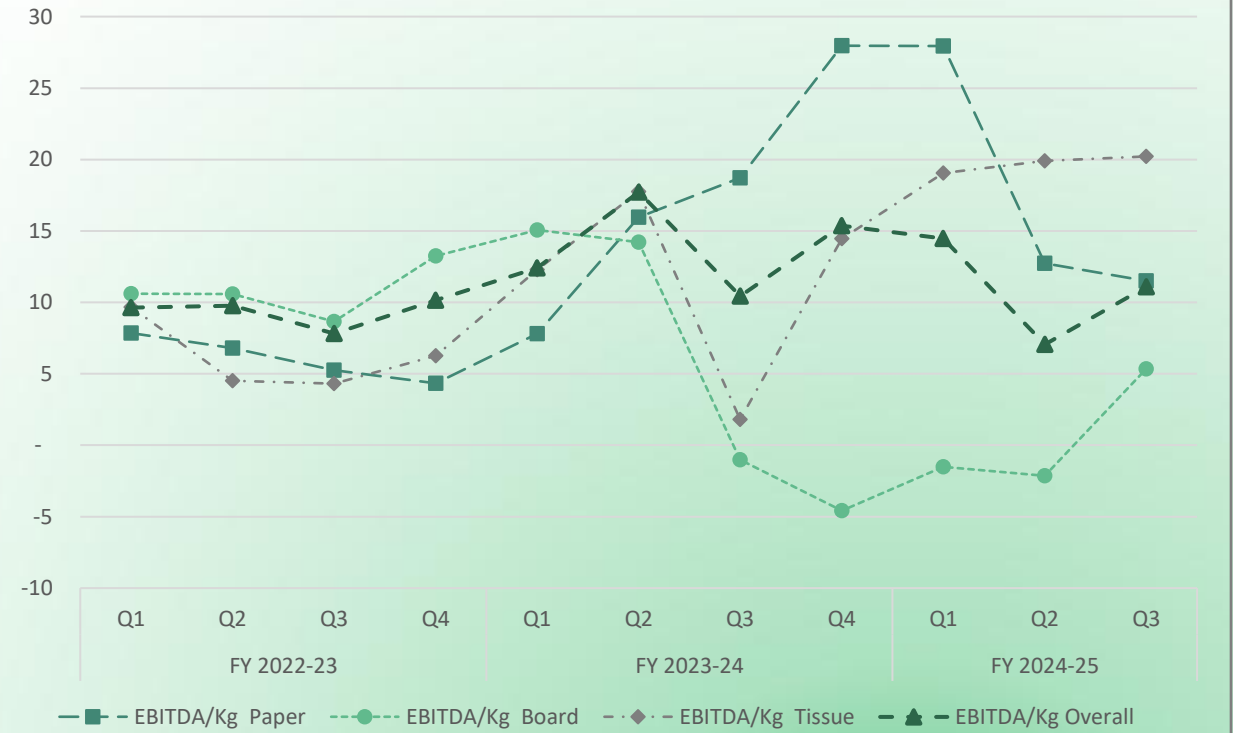


Revenue Mix - 9M FY24

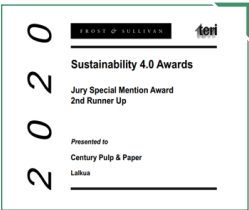


*RGP discontinued in FY24

Segment-Wise Profitability (EBITDA per Kg)



AWARDS & CERTIFICATIONS (2020-23)



Frost & Sullivan and Teri Sustainability 4.0 Challengers Award under 4 major pillars, i.e. People, Partnership, Purpose and Planet.



Frost & Sullivan and Teri Sustainability 4.0 Jury Special Award-2020 (2nd runner-up) towards various Energy Conservation efforts made by the plant. Covering various energy conservation parameters and plant's contribution to environment, among others.



1st Prize – All India Farmer's Fair and Agro Industrial Exhibition, 2023, G B Pant University of Agriculture & Technology, Pantnagar, Uttarakhand.



2nd Prize – Outstanding Business Association as 'Importer' in Container Corporation of India (CONCOR) – FY 2023-24



Quality Circle Award – In 36th Quality Circle Competition organised by govt 'CII Award for Creativity' (Confederation of Indian Industry).

Century Pulp & Paper is the holder of following certifications:



ISO 9001



ISO 14001

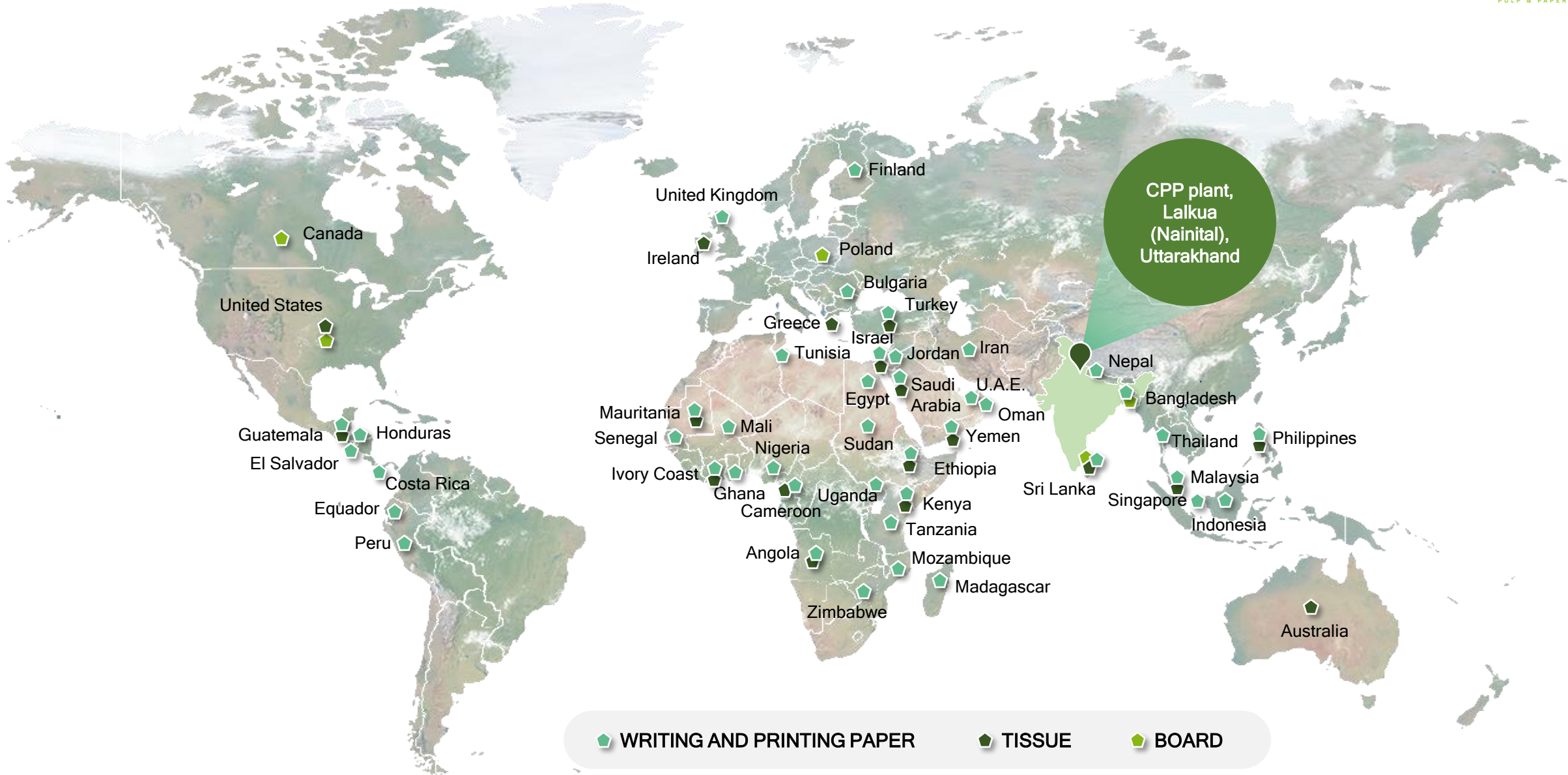


ISO 45001:2008



FSC C104223

GEOGRAPHICAL PRESENCE



CENTURY PULP & PAPER MILL - MANUFACTURING CAPACITIES



- ▶ Established in 1984, the manufacturing facility is India's only integrated Pulp & Paper mill that delivers comprehensive solutions in finest varieties of Writing & Printing Paper, Virgin fiber grade fine tissue, Multilayer Packaging Board and Rayon Grade Pulp.
- ▶ Situated at the foothills of the Himalayas in Lalkua (Nainital), Century Pulp and Paper is a committed employer of the local community.



Fiber Line Pulp Mill



Bagasse Pulp Mill



PGP Pulp Mill



Raw Material Storage and Chipping



WPP Pulp Mill



DIP

CENTURY PULP & PAPER MILL - MANUFACTURING CAPACITIES



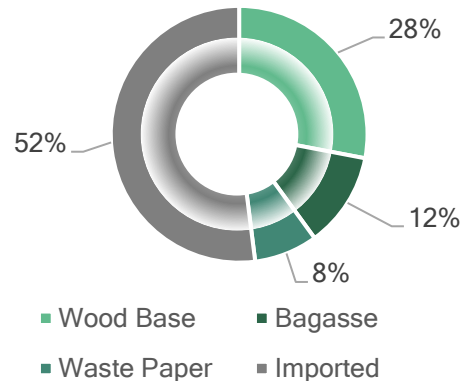
4.81 lakhs MTPA
Total Capacity

> 6,500 (Approx)
Manpower

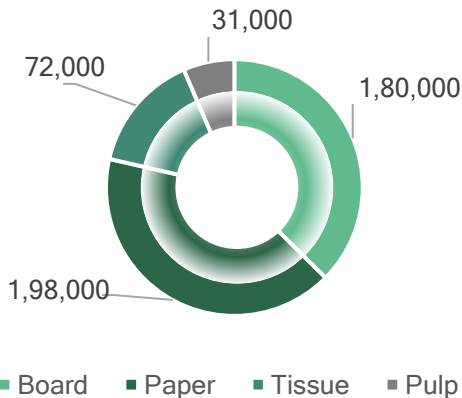
87 MW (Self Generation Turbine)
Power

₹ 4,607 Crores (31st December 2023)
Fixed Assets

Raw Material Flexibility (Volume in mt) - 9M FY24



Production Capacity Break-up (tons/per year)



PRINTING, WRITING PAPER & INDUSTRIAL PAPER



- ▶ Century Pulp & Paper range of writing and printing paper is used to produce a wide range of stationery such as notebooks and envelopes.
- ▶ Printing paper is specially designed for printing books, note books, publishing and printing due to its uniform, fast ink-trapping and drying qualities, as well as its dimensional stability.
- ▶ The products manufactured include Cream Wove, Maplitho and Specialty Paper.
- ▶ Century manufactures different type of paper used in Industrial use: wide range of packaging, cardboard, tissue, insulation and wrapping products.

PACKAGING BOARD



PACKAGING BOARD

- ▶ The Company is a provider in primary and secondary packaging, offering ready to use material required by the pharmaceutical, food and FMCG sectors among others

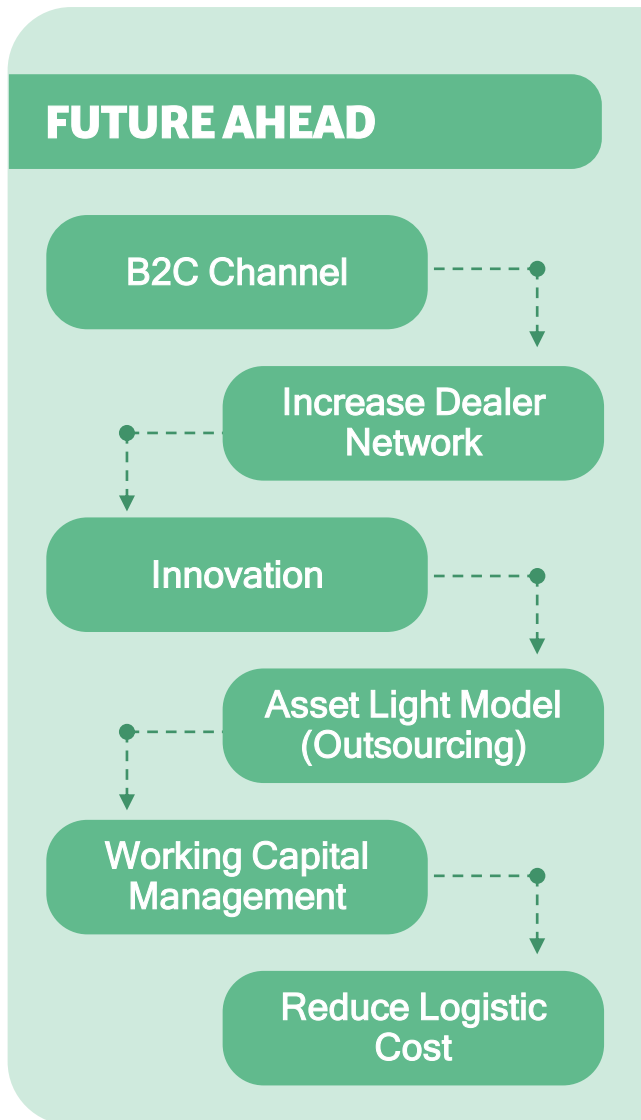
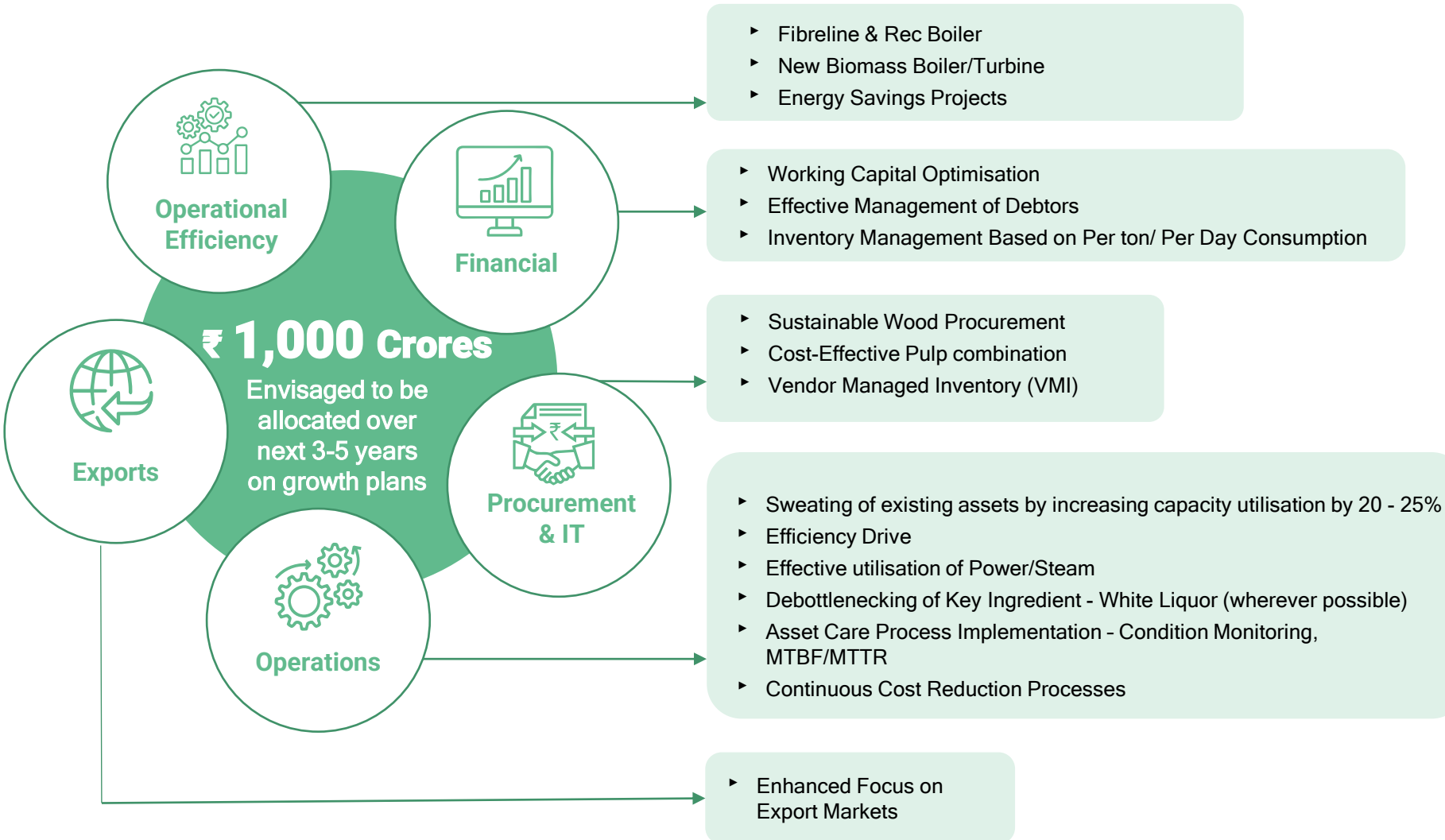
TISSUE PAPER



TISSUE PAPER

- ▶ Set up in 2009 & 2021, Century is the largest and most advanced manufacturer of Jumbo Soft Tissue Paper Rolls in India.
- ▶ The products include Facial Tissue, Towel Grade Tissue, Napkin Tissue and Toilet Tissue.

KEY INITIATIVES ENVISAGED





CARBON MANAGEMENT

Century Pulp & Paper takes every effort to reduce its carbon footprint and impact to the environment by continued improvements and process modification and Fuel Switch/Alternate Renewable Energy Source.



Fuel Switch



Process Modification

Energy Consumption

CPP's Total Energy requirement is of 3,12,700, out of which 33.80% is Renewable Energy, which is planned to increase to 65% by FY 2025-26.



OTHER INITIATIVES FOR CONSERVATION OF ENERGY INCLUDE



Conservation of Energy

Steps Taken on Conservation of Energy

In FY 2023-24, savings of about 4 GWh and equivalent to ₹ 8.5 Crores by implementing 39 energy saving schemes like:

- ▶ Installation of VFDs and cleaning of condenser tubes in powerhouse, leading to saving electricity
- ▶ Coal crusher in coal plant, thereby reducing CHP running hours, leading to saving electricity
- ▶ MP Heater for Boiler 8 taken in line, thus increasing boiler efficiency
- ▶ Installed Shell & Tube heat exchanger in Bagasse Pulp mill leading to thermal savings
- ▶ Blow Heat Recovery utilised to generate heat from digester
- ▶ For steam saving, installed efficient secondary air heater,
- ▶ Installed burner at lime kiln for higher utilisation of PG gas, in place of FO
- ▶ Installed Centralised Refining System to feed pulp at multiple plant's need,
- ▶ Improved turbine vacuum
- ▶ Optimised PGP's consistency to save refining energy
- ▶ Steam valve optimisation to minimise MP steams peaks in various pulp mills

Steps Taken for Utilising Alternative Sources of Energy

- ▶ Continued usage of Black Liquor & Pith (Biomass product) for steam generation
- ▶ Continue usage of CMG at Tissue Plant in place of LPG
- ▶ Increased usage of Producer Gas in lime kiln
- ▶ Utilisation of Solar Energy
- ▶ Replacement of FO with LSHS



Technology Absorption

Efforts Made Towards Technology Absorption

- | | |
|----------------------------------|-------------------------------------|
| ▶ New HeadBox at WPP Plant | ▶ Upgradation of COL System at PM#3 |
| ▶ New CHM Cutter at PM#3 | ▶ WPP Calendar Upgradation |
| ▶ Installation of New Evaporator | ▶ Industry 4.0 at PM#4 |

Benefits Derived as a Result of the above Efforts

- ▶ Reduction in Power Consumption
- ▶ Quality Improvement
- ▶ Reduction in Steam Consumption



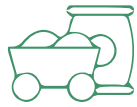


CONSERVATION ACTS

Century Pulp & Paper runs a number of forest and water conservation initiatives in line with its corporate philosophy.

Forest Conservation

- ▶ Bagasse and recycled waste paper used as a raw material eventually help in conservation of Virgin Wood thus promoting resource efficiency
- ▶ ECF pulping at the new fibre line (pulp mill) is chlorine-free
- ▶ Installation of screw presses for effluent solids to be reused
- ▶ Steam prehydrolysis process at fibre line acts as an energy saver, helping in water conservation and reduction in effluent load
- ▶ Reuse of machine back water in the pulp mill after clarification and filtration process
- ▶ Reuse of RGP bleaching back water for washing of bagasse
- ▶ PH liquor is mixed with weak black liquor, concentrated in the evaporator, and finally fired in the recovery boiler to curb pollution and generation of steam



RAW MATERIALS

- ▶ Century Pulp & Paper follows local legislations closely as it is committed in the conservation of the environment and the protection of its stakeholders' interests. As a result, the Company adheres to major raw material requirements set by the Agro-forestry sector.
- ▶ Century Pulp & Paper uses a variety of raw materials and pulvable raw material species, such as eucalyptus, poplar, vineer waste, bamboo, bagasse and recycled waste paper to manufacture its products.
- ▶ As a technologically advanced company, Century Pulp & Paper generates its own plantation activities by preparing high-yielding eucalyptus clones of one of the best soils in India. This increases the size of the catchment areas and fulfils the Company's own raw material requirements.
- ▶ Century Pulp & Paper has its own chemical recovery process where the Company treat black liquor into white liquor and recycled to pulping process. This is done as black liquor is harmful to the environment when left as an effluent. The Company also adopts wood-free paper manufacturing, where a chemical pulping process is used to create its products. Made from pulpwood, chemical pulp is not considered wood as most of the lignin is removed and separated from the cellulose fibres during processing. This is unlike mechanical pulp where it retains most of its wood components. In addition, wood-free paper is not as prone to yellowing as papers made of mechanical pulp.
- ▶ Due to its numerous capabilities, Century Pulp & Paper is known to house one of the most complex manufacturing setups under one roof.





ENVIRONMENT



Development of grassland and water holes for wildlife at the Forest Division, Haldwani



Catering to about 10000 direct and indirect beneficiaries



Grassland restoration increases the area of grazing ground for both livestock and wild ungulates. Water holes will provide drinking water for wildlife as well as recharge ground water thus helping in creating a sustainable environment



SOCIAL

Installation of 37 nos. of hand pumps for drinking water at Bindukhatta, Lalkua & Shanti Puri. Catering to about 4,000 Nos. of direct beneficiaries



Community Medical camp was organised at Government Inter-College, Lalkua on Feb 26, 2023, with a team of expert doctors including physicians, ENT Specialists, Gynecologist, Child specialist, Neurologist and pathologist

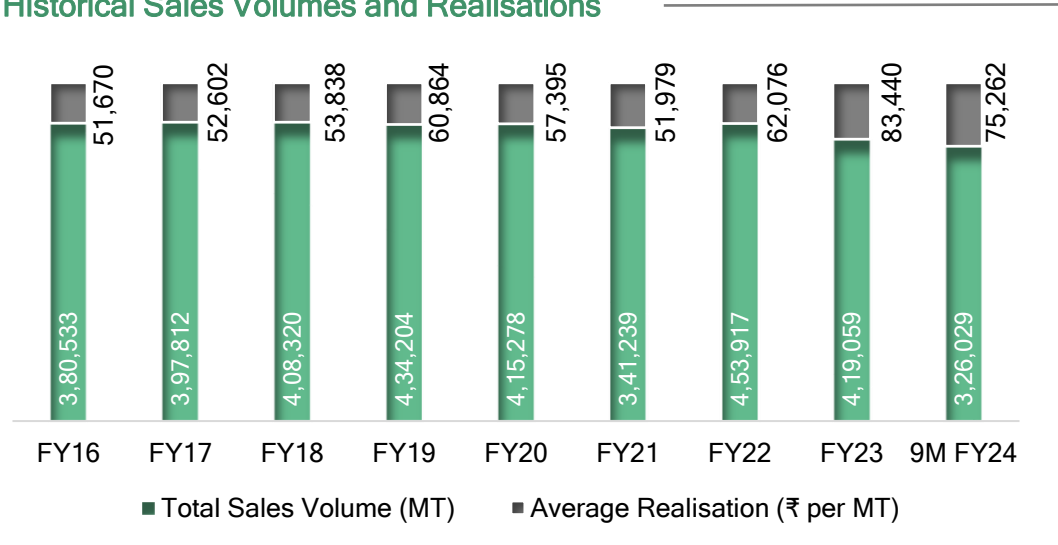


- Free medicines provided with required checkup
- Direct beneficiaries of the camp - 748 Nos.

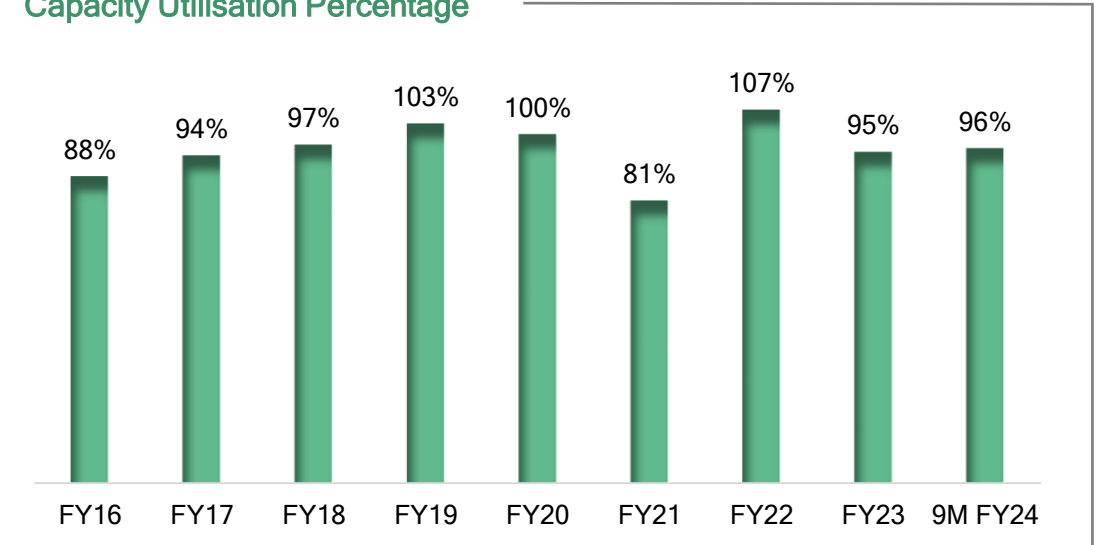
Governance - Robust Compliances of All Regulatory Requirements

STRATEGIC PERFORMANCE (2015-2024)

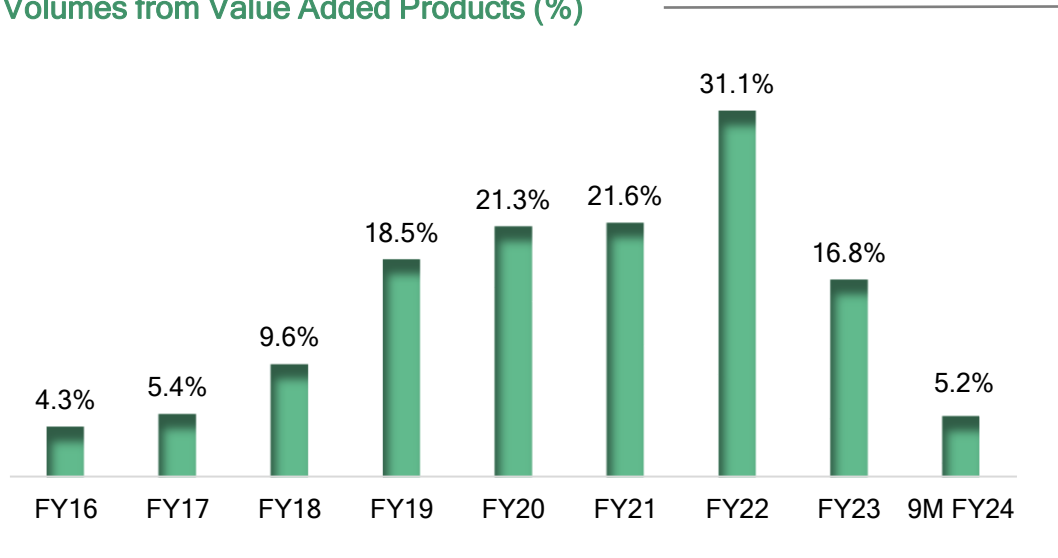
Historical Sales Volumes and Realisations



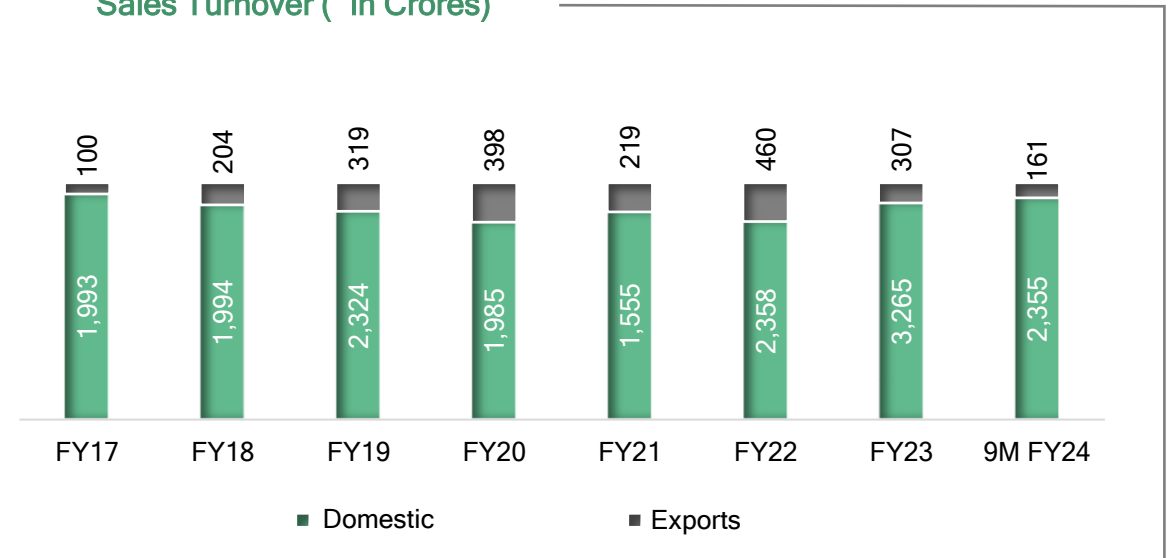
Capacity Utilisation Percentage



Volumes from Value Added Products (%)

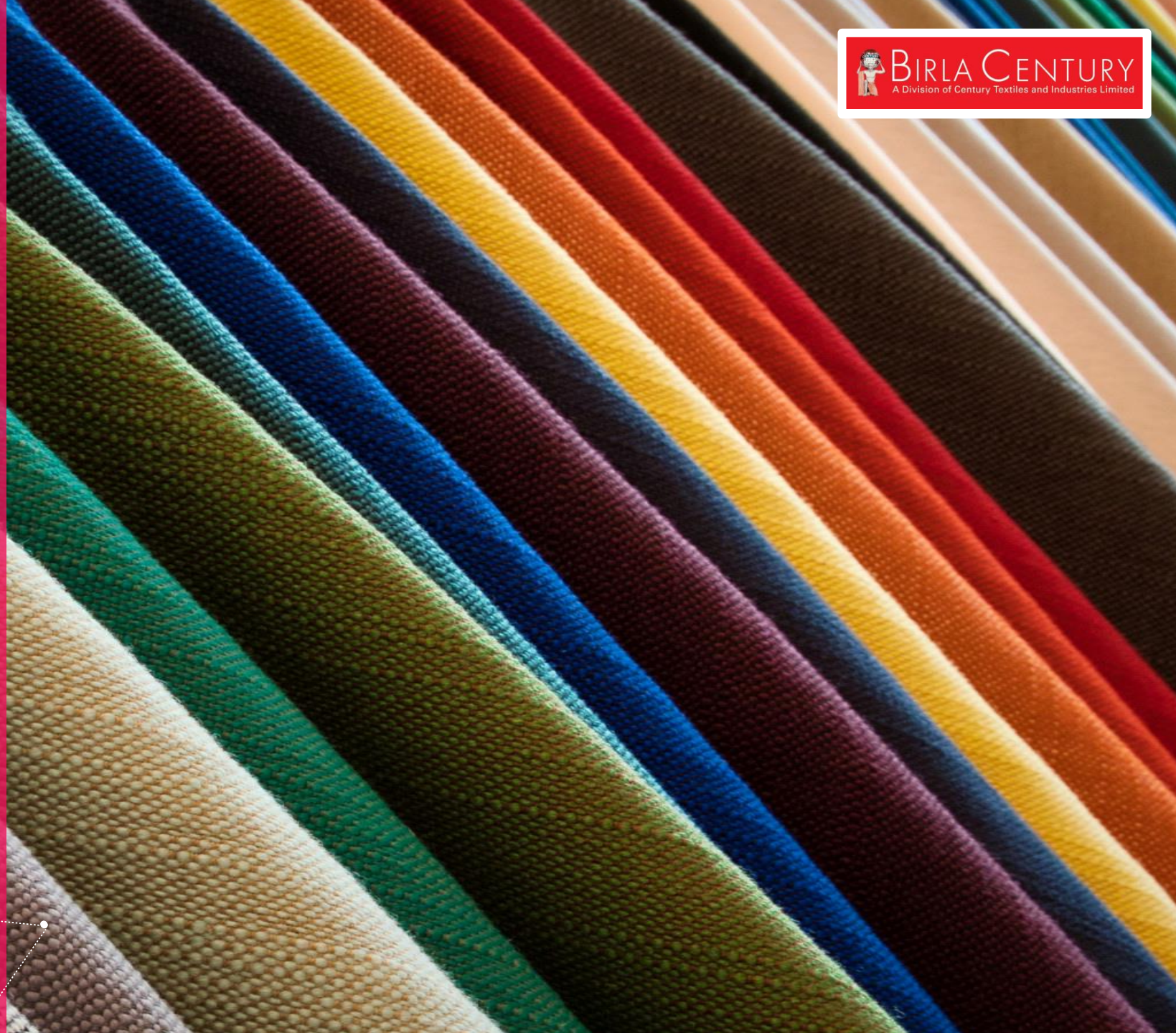


Sales Turnover (₹ in Crores)



Textile

World's 2nd and
India's 1st LEED
V4 certified Textile
Mfg. Co.



- ▶ Century Textiles and Industries Limited (CTIL), was incorporated in Mumbai, India, in 1897. A state-of-the-art, vertically integrated plant, Birla Century (A Division of CTIL) was set up at Jhagadia, Bharuch, Gujarat, in the year 2008, using the best modern machinery to produce a wide range of premium textiles.
- ▶ The Company's USP is the customisation it offers clients in terms of the weave, design, and texture of its products. It has an extensive network of distributors and dealers in India and also sells its exclusive range of home-textiles and other products in the global market.
- ▶ The focus is on manufacturing products of excellent and consistent quality; adding value by offering a variety of weaves, designs, and finishes, innovating continuously to create new products, and satisfying our customers with our excellent service and timely delivery.

PRODUCT PORTFOLIO



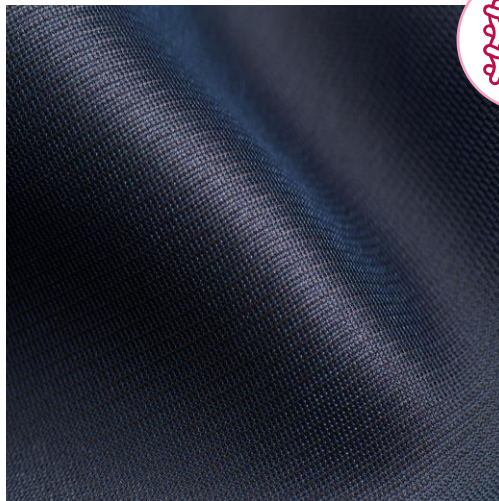
SHIRTINGS

Manufactures premium range elite shirting in elegant designs, weaves and colours in the range of Ne 40 to Ne 150 in singles and Ne 2/80 to Ne 2/200 in 2 plys.



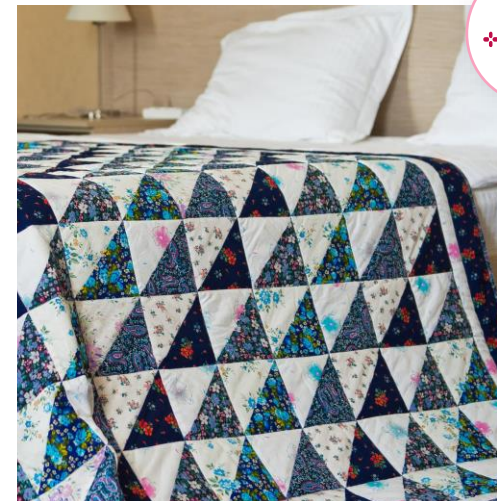
BOTTOM WEIGHT

As one of the leading bottom-weight fabric manufacturers in India, the company manufactures luxury bottom weights in the range of Ne 10 to Ne 4/100 and is available in whites, solids, prints, and yarn dyed with special weaves and designs.



FINER FABRICS

The Birla Century range of finer fabrics i.e. dress materials are available in a variety of contemporary designs, weaves and colours. Poplin, cambric, lawn, twill, satin, mull, voile, dobby and slub dress materials are manufactured at the technologically-advanced factory in the range from Ne 40 to Ne 150 in singles and doubles.

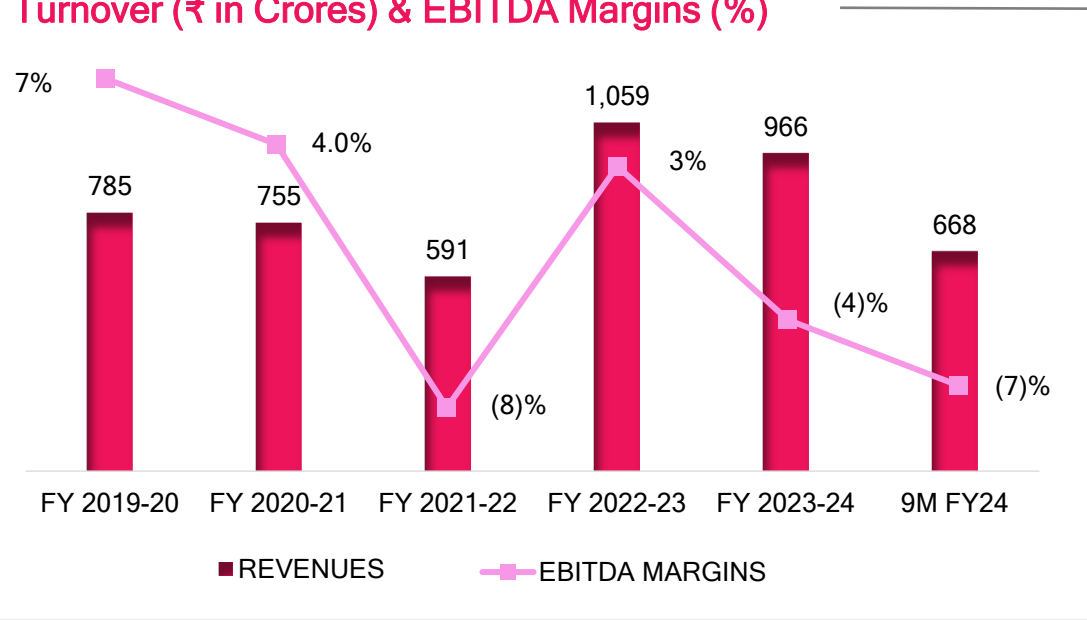


BED LINEN

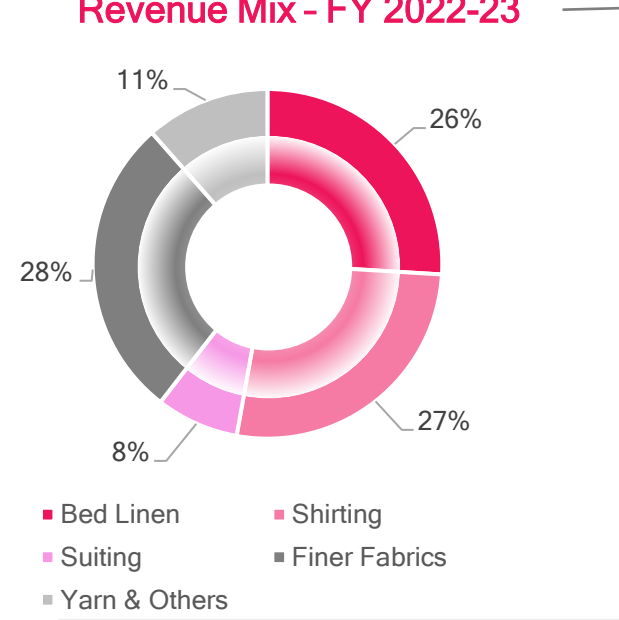
Premium quality household linen from Birla Century includes a wide range of elegantly tailored sheets, and bed and bath coordinate pieces. Suited perfectly for domestic as well as international markets, the 100% cotton products are available in varied styles and designs in the range of 180 TC to 2000 TC.

EXECUTIVE SUMMARY - CENTURY TEXTILES

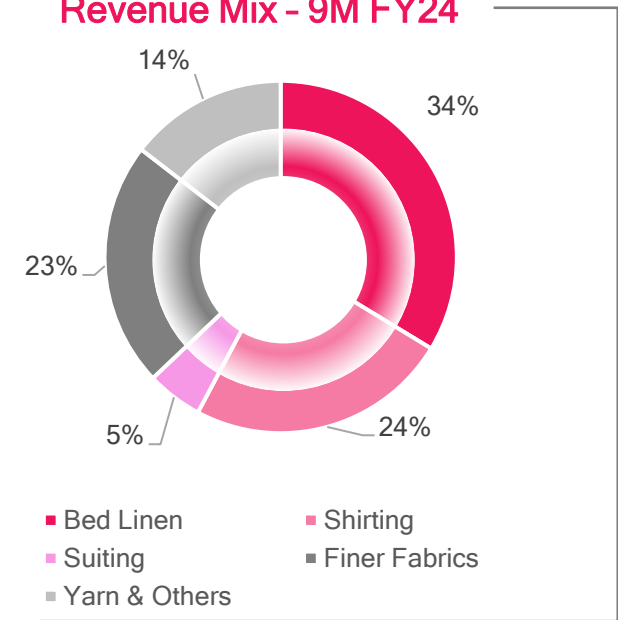
Turnover (₹ in Crores) & EBITDA Margins (%)



Revenue Mix - FY 2022-23



Revenue Mix - 9M FY24





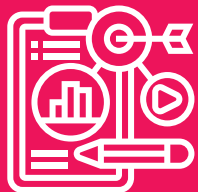
Strengths

- ▶ Legacy of Textile for more than 100 years
- ▶ Birla Century brand
- ▶ STEP Certification - The 1st fabric manufacturing Company in India to receive this for sustainability



Growth Drivers

- ▶ US-China trade war has increased the demand for Indian products in USA
- ▶ RCEP (Regional Comprehensive Economic Partnership) non-signing at present helps India's domestic market
- ▶ Go-green & zero-discharge at Bharuch unit, justifies parameters of global brand
- ▶ Opened LLC at USA to cater to big brands, regional retailers, and hospitality industries, among others.



Advantages

- ▶ Increased penetration of organised retail, better demographics and rising income levels
- ▶ Growing exports demand and direct catering to big brands in USA

BIRLA CENTURY - JOURNEY OF BUSINESS SUSTAINABILITY



Oeko-Tex Standard 100



NABL Accreditation for our Testing Laboratory of Birla Century



STeP- Certification



MIG Tags



SA 8000- 2014



LEED (Leadership in Energy and Environmental Design)



BCI Registered Member (Better Cotton Initiative)



Global Organic textile Standards (GOTS)

Apart from above, Birla Century has similar certifications from world renowned international accreditation institutes, certifying either Go-Green, product safety, safer environment, social performance expectation, healthy working conditions, sustainability etc. Other sustainability initiatives include Fair Trade, HIGG Index Level 3, ZDHC participation, Joint Life Program approved unit from Inditex (Zara). Birla Century is the approved supplier of international brands like Macy's, West point Home, William Sonoma, COSTCO, Standard Fibre etc. for Bed linens.

BIRLA CENTURY - JOURNEY OF BUSINESS SUSTAINABILITY



Oeko-Tex Standard 100



NABL Accreditation for our Testing Laboratory of Birla Century



STeP- Certification



MIG Tags



SA 8000- 2014



LEED (Leadership in Energy and Environmental Design)



BCI Registered Member (Better Cotton Initiative)



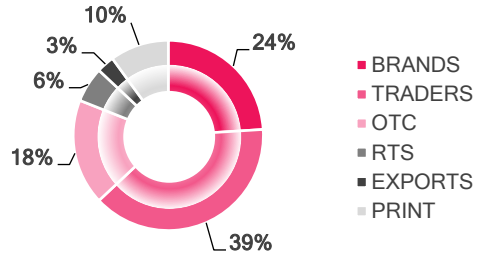
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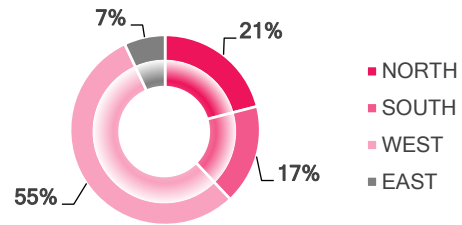
GEOGRAPHICAL PRESENCE

APPARELS

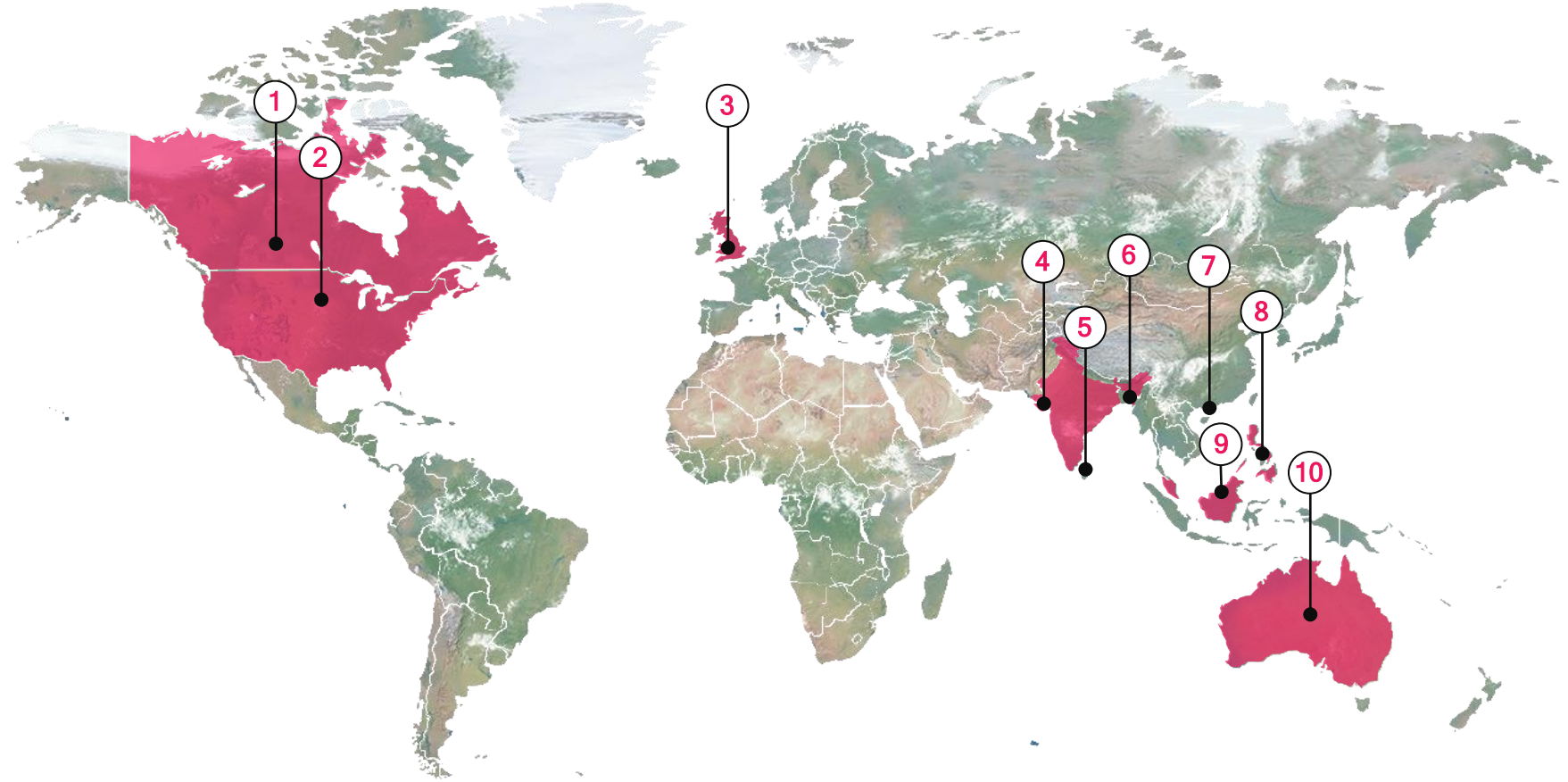
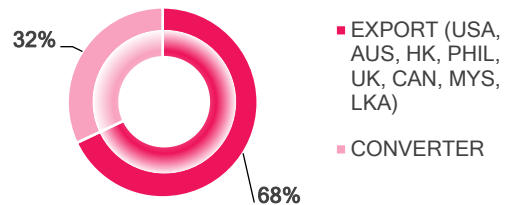
Segment-Wise



Zone-Wise



HOME TEXTILES



- 1 Canada
- 2 United States
- 3 United Kingdom
- 4 Birla Century Plant, Bharuch, Gujarat
- 5 Sri Lanka
- 6 Bangladesh
- 7 Hong Kong
- 8 Philippines
- 9 Malaysia
- 10 Australia

TEXTILES MANUFACTURING FACILITY & PROCESS

- ▶ Century Textiles & Industries Limited invested about USD 180 million (₹ 850 Crore) in setting up, a Greenfield project in Jhagadia, Bharuch, Gujarat known as 'BIRLA CENTURY' to manufacture textile products.
- ▶ Spread over an area of 42.56 million sqft (100 acres) of land, it's strategic location provides it logistical advantage in terms of easy connectivity and accessibility via rail, air and road links.
- ▶ Our manufacturing technology compares with the best across the globe, offering speed, versatility and quality. Most of the technology procured for the plant is from the best manufacturers of equipment in their respective fields.
- ▶ Our processing machines offer finished fabrics from 54" to 117" finish width with eco-friendly dyes and chemicals to suit the needs of the customers.
- ▶ We produce world-class cotton fabrics with soft, anti-wrinkle (MXL technology), water resistant, fragrant, stain release, bio-polish, stiff finish and various sustainable and performance finishes.

Innovation through Research & Development

The Company has an established design studio at our corporate office in Mumbai and at the plant in Bharuch, Gujarat, equipped with an active library of designs for weaves. Designers continue to add new designs to this portfolio every day and this ongoing design development and the extensive design database enables us to be a trendsetter in the market.



41 million
Metres of Fabric



Wet Processing



Finishing



On-line Control



Effluent Treatment



SHIRTINGS

- ▶ The Company manufactures premium range elite shirting in elegant designs, weaves and colours
- ▶ Birla Century's shirting with 100% Indian and Egyptian cotton with various blends etc. comes in innovative finishes like bio-polish, wrinkle-free and crease-resistant

BED LINEN

- ▶ Birla Century is one of the leading bed and bath linen manufacturers in India
- ▶ Birla Century's bed linen products come in innovative finishes like MXL, easy iron, easy care, anti-wrinkle, aroma, water-repellent, and anti-bacterial etc.
- ▶ The products are manufactured with yarn made of 100% cotton i.e. Indian, Suvin, Giza, Pima, Organic, and others, etc and blends of linen, Modal, Excel and Bamboo, among others



Marquee Clients





BOTTOM WEIGHTS

- ▶ Birla Century offers luxury suiting fabrics (bottom-weight fabrics) in myriad shades and textures to suit every taste.
- ▶ As one of the leading bottom-weight fabric manufacturers in India, our suiting is characterised by high dimensional stability, or, in other words, the ability to retain its size and form. It is wrinkle-free, crease recoverable, amazingly smooth, and exudes a brilliant lustre.

FINER FABRICS

- ▶ The Birla Century range of Finer Fabrics i.e. dress materials are available in a variety of contemporary designs, weaves and colours.
- ▶ Poplin, cambric, lawn, twill, satin, mull, voile, doobby and slub dress materials are manufactured at the technologically-advanced factory.
- ▶ In addition to products with cotton, fibres like modal, excel, and viscose, among others, are manufactured along with a range of traditional sarees and dhotis.

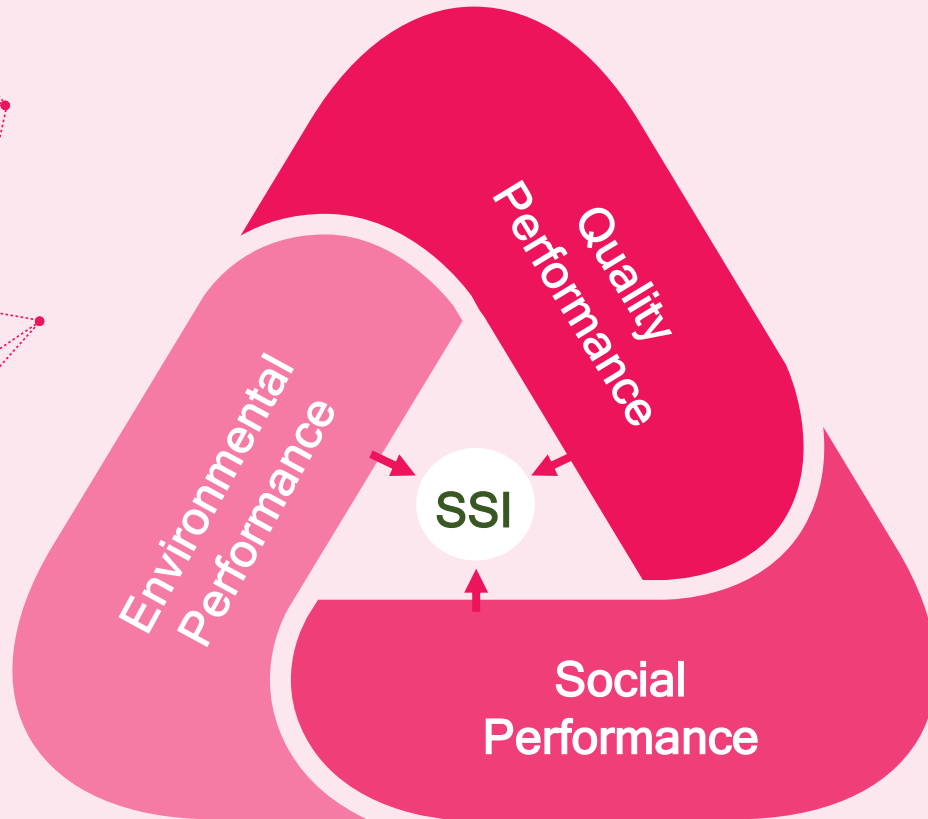


Marquee Clients

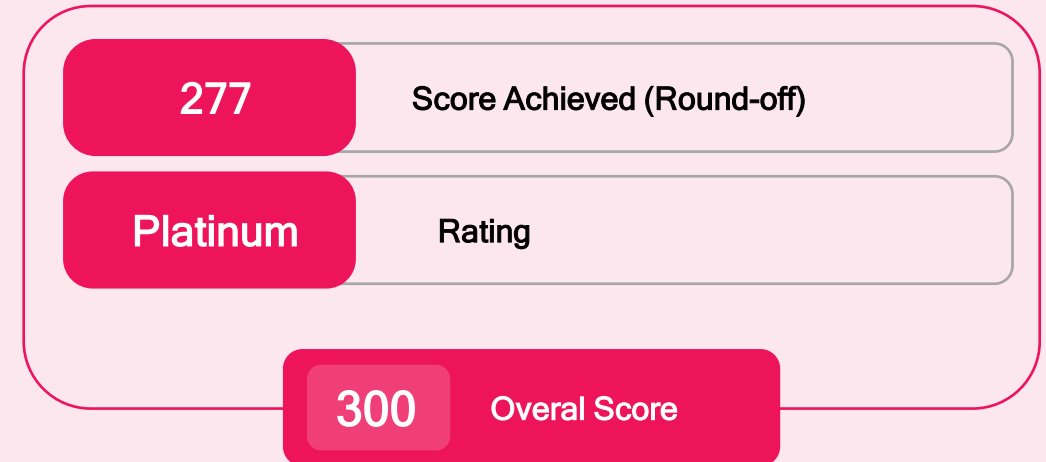




ENVIRONMENT



- ▶ Birla Century received PLATINUM category in the SSI (Suppliers Sustainability Index) assessment of Aditya Birla Fashion & Retail Limited
- ▶ Sustainability Index is a rating system designed to gauge the sustainability the supply chain. It provides an all-encompassing evaluation of a supplier's ESG performance, culminating in a singular score.





SOCIAL

CSR initiative of
BIRLA CENTURY, JHAGADIA

प्राकृतिक कृषिनो उपहार भेदूतोनी प्रगति अपरंपार MO:8264029259

**PRAGATI : Rural Development Project
for Organic Farming**
(प्राकृतिक भेती अपनावी भेतीनी आवक वधारो)



- ▶ Birla Century Designed a sustainable & easily adoptable solution i.e a vermicompost plant. We have installed this unit at 200 farms where farmer producing fertilisers through vermicompost plant & doing organic farming as well as selling fertilisers in the market for organic farming at a handsome cost.
- ▶ Recently we have conducted an appreciation ceremony for farmers for their efforts, and Our Chief Guest was SDM- Jhagadia.



GOVERNANCE

Organic

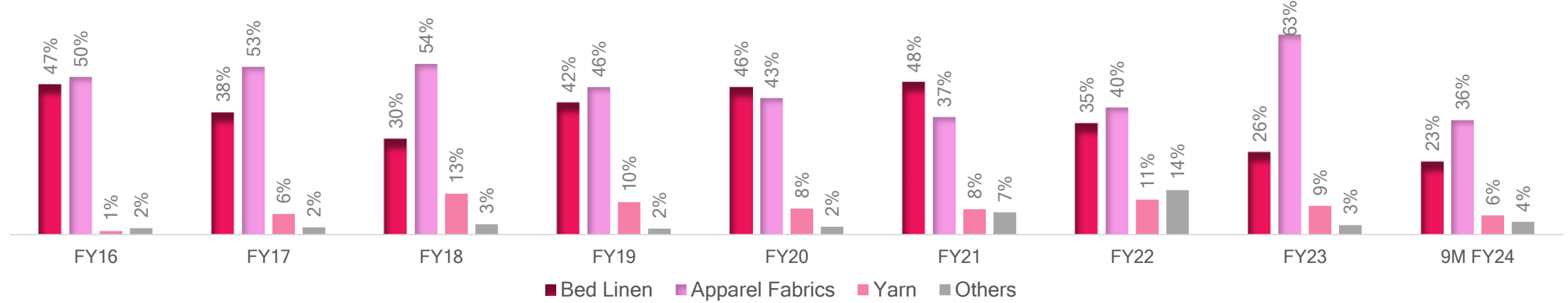


Commission
Dyeing & Finishing

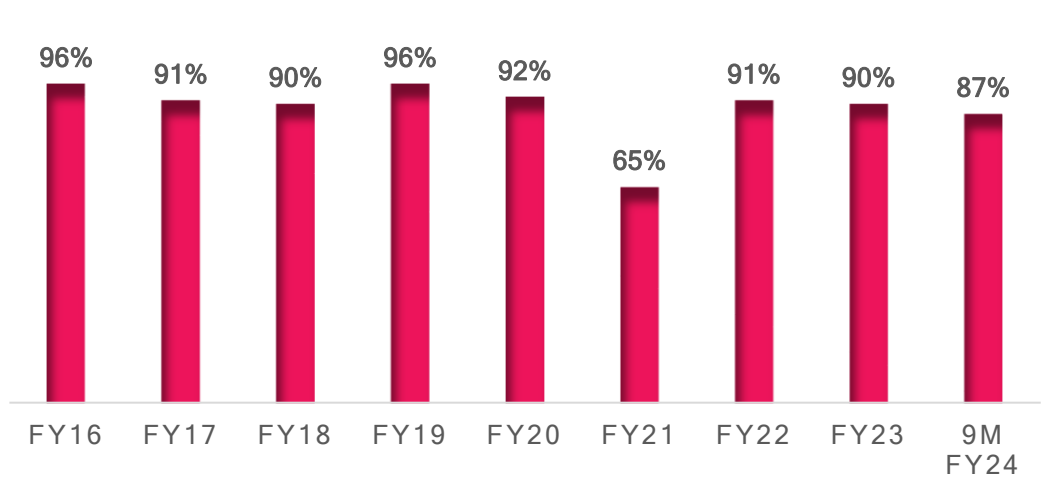


- ▶ Oeko-Tex for organic products: We can offer Organic & Oeko-Tex certified products in the market, it means product manufactured with sustainable fiber & used ecofriendly dyes chemicals which are tested by Oeko -Tex for more than 300 hazardous chemicals.
- ▶ Oeko -Tex certification for commission dyeing & finishing: Now, we can cater to customers who want to process their greige fabrics in Birla Century's factory. This certification has opened new business opportunities for us.

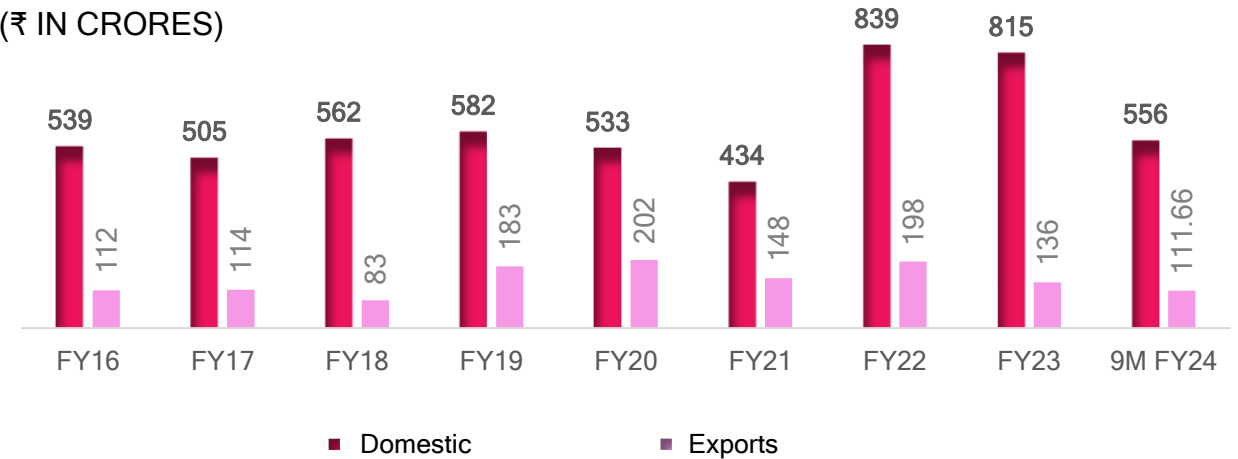
Business Mix (Revenue)



Capacity Utilisation Percentage



SALES TURNOVER (₹ IN CRORES)



Financial Summary

Moderate financial
performance in 9M
FY24 displaying
resilience in volatile
markets



HISTORICAL CONSOLIDATED FINANCIAL PERFORMANCE



(₹ In Crores)

Particulars	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	9M FY 2023-24
Continuing Operations						
Sales						
Textiles	765	735	582	1,036	951	651
Pulp & Paper	2,643	2,383	1,774	2,818	3,572	2516
Real Estate	159	146	142	140	137	164
Others	66	67	69	74	59	42
Total Sales	3,633	3,331	2,567	4,068	4,719	3373
EBITDA						
Textiles	58	34	-48	29	-38	-52
Pulp & Paper	716	511	221	424	725	352
Real Estate	232	4	31	-22	-50	30
Others	55	51	48	56	50	54
Interest Income of Income Tax Refund	-	-	33	-	-	-
Total EBITDA	1,061	600	285	487	687	384
Less : Finance Cost	102	87	71	52	54	46
PBDT	959	513	214	434	633	338
Less : Depreciation	193	229	230	231	227	179
Exceptional Item						-64
PBT	766	284	-16	204	407	96
Tax	266	-94	-1	50	142	39
Share of Profit from JV - BAKPL						-17
Net Profit after Tax	500	378	-15	154	265	40
Discontinuing Operations						
Profit after Tax	-30	-17	-19	8	-	0
Total Net Profit after Tax	470	361	-34	162	265	40

CASH FLOW - 9M FY24



(₹ In Crores)

No	Particulars	Textile	Rayon	Pulp & Paper	Birla Estates	H.O.	Grand Total
	EBITDA-Normal Business	-52	54	352	30		384
	EBITDA-Exceptional Item			156			-18
	MAT Paid				-34	-56	-90
	Dividend Paid (Including Tax)					56	-56
	Collections				802		802
	Project Development Cost				-1939		-1939
	Income Tax Refund					23	23
	Net Change in Working Capital	79	-55	-5	21		40
A)	Operating Cash Flow	9	0	347	-1119	-89	-854
	Capital Expenditure	-10	-	-65	-6	-2	-83
B)	Investing Cash Flow	-10	0	-65	-6	-2	-83
	Interest	-22	-6	-8	9		-28
	Contribution to CTIL Emp Welfare Trust (ESOP)					-95	-95
	Interest Accrued on Bond					53	53
C)	Financing Cash Flow	-22	-6	-8	9	-42	-70
D)	Free Cash Flow (A+B+C)	-23	-7	273	-1117	-133	-1007
E)	Capex Done on Behalf of BAKPL					21	21
F)	Free Cash Flow-CTIL & BAKPL (D+E)	23	-7	273	-1117	-112	-986

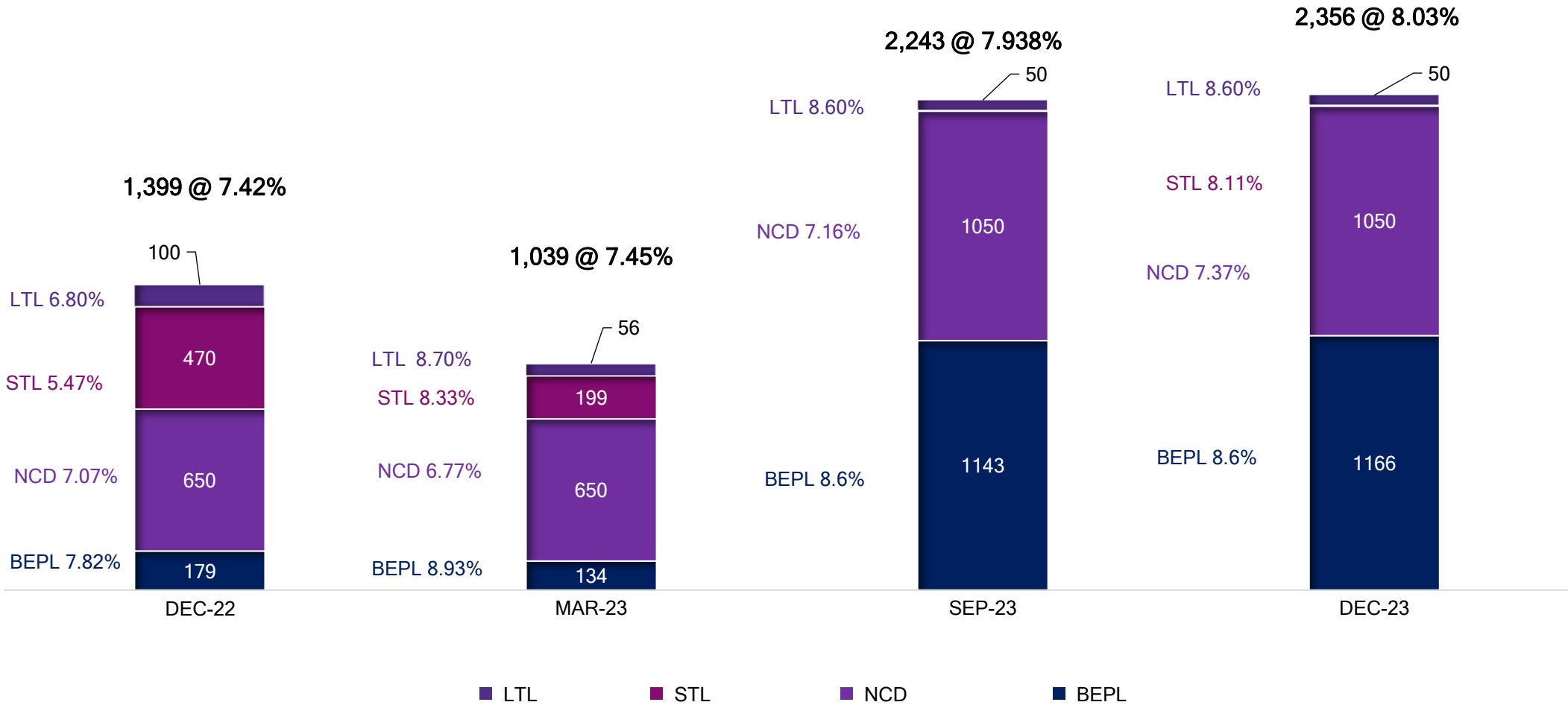
CAPITAL EMPLOYED - AS ON 31st DECEMBER, 2023



(₹ In Crores)

No	Particulars	Continued operations				Total
		Textile	Rayon	Pulp & Paper	Birla Estates	
A)	Net Block	351	217	2304	1142	4,014
B)	(i) Current & Non Current Assets	275	24	714	4760	5773
	Inventory	139	3	565	4182	4889
	Debtors	92	-	58	11	161
	Other Assets	44	21	91	567	723
	(ii) Current & Non Current Liabilities	277	675	531	2502	3985
	Creditors	271	-	398	165	834
	Other Liability	6	675	133	2337	3151
	Net Working Capital (i-ii)	-2	-651	183	2258	1788
	Net Working Capital (March 23)	47	-713	179	1114	626
C)	Cash & Bank Balances	0	3	3	170	176
D)	Capital Employed in the Segment	349	-431	2490	3570	5978
F)	Loan Allotment to Segment	0	0	88	2268	2356
	i. Specific Loan	0	-	-	1184	1184
	ii. Allocated Loan	0	-	88	1084	1172
	Ratios					
	Debt/Equity					0.57

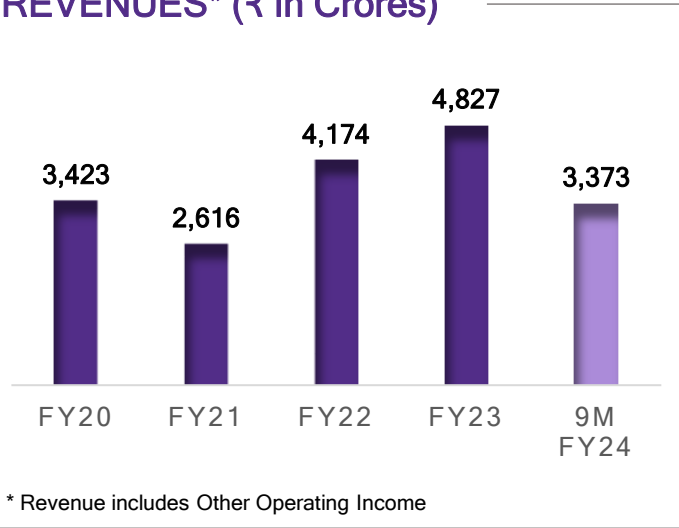
OUTSTANDING LOAN



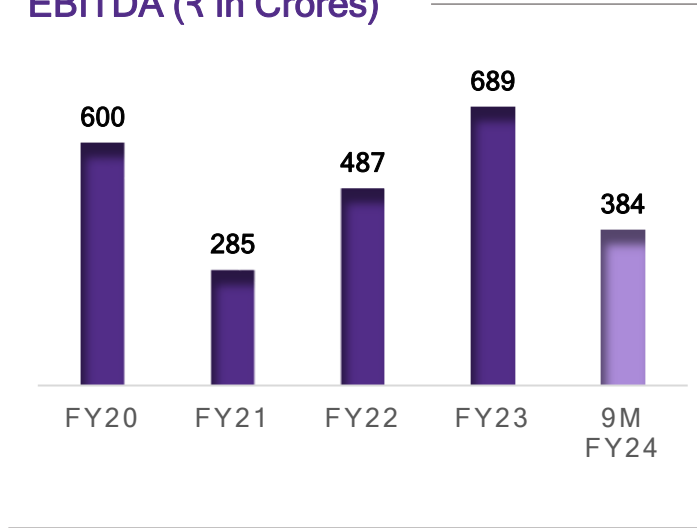
FINANCIAL PERFORMANCE



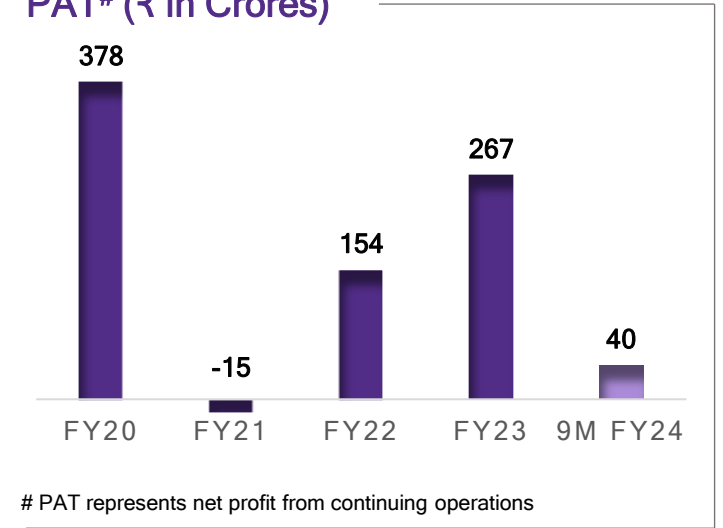
REVENUES* (₹ in Crores)



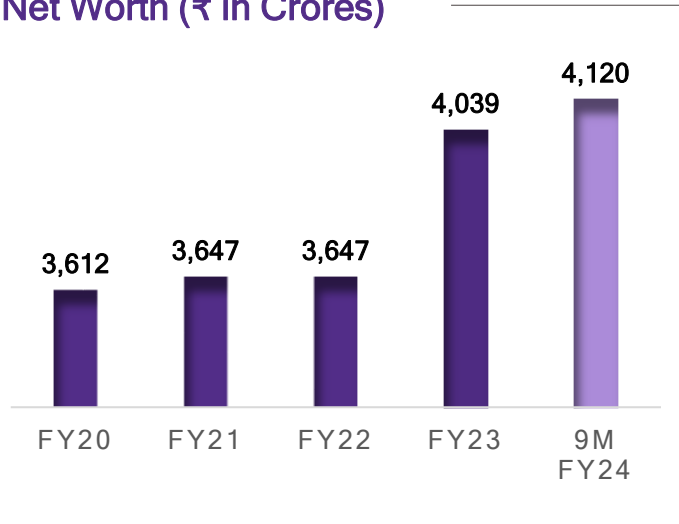
EBITDA (₹ in Crores)



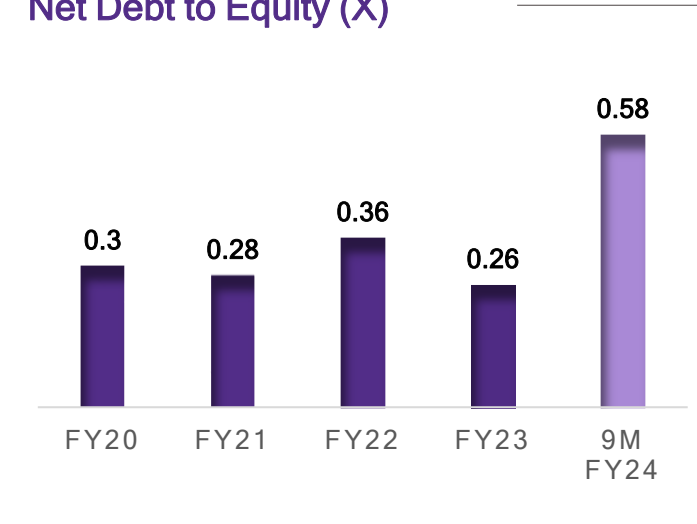
PAT# (₹ in Crores)



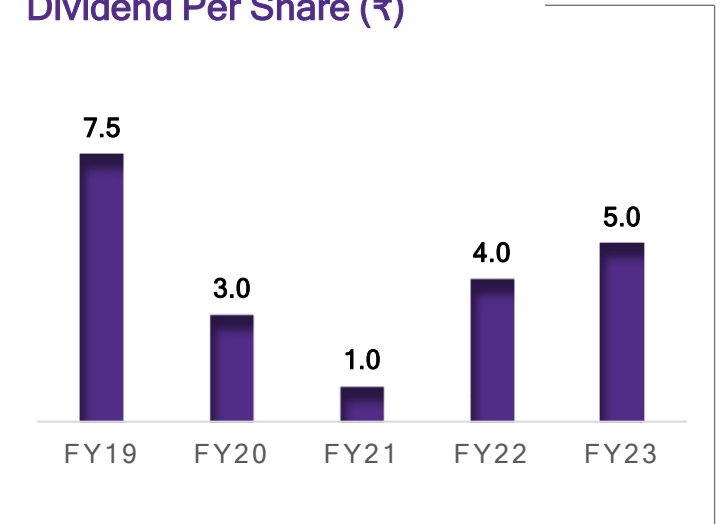
Net Worth (₹ in Crores)



Net Debt to Equity (X)



Dividend Per Share (₹)



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THANK YOU



Bringing our century old legacy and expertise into all our businesses while focusing on sustainability, customer centricity, technology and innovation to be future ready