



GTFL:SEC:2021

June 06, 2021

BSE Limited

Corporate Relationship Department,
New Trading Ring,
Rotunda Building, P. J. Towers,
Dalal Street, Fort,
Mumbai 400001.

(Company code: 509557)

National Stock Exchange of India Ltd.

Exchange Plaza, Plot No. C/1, 'G' Block,
Bandra-Kurla Complex,
Bandra East,
Mumbai 400051.

(Symbol: GARFIBRES, Series: EQ)

Sub:- Disclosure under Regulation 30 of the Securities and Exchange Board of India (Listing Obligations and Disclosure Requirements) Regulations, 2015

Dear Sirs,

Pursuant to the aforesaid Regulations, please find below the schedule of investor / analyst meeting / conference to be held as under.

Schedule of the Investor / Analyst Meet / Conference:

Date	Name	Mode of Meeting	Type of Meeting
June 07, 2021	Ambit Capital Private Limited	Virtual Platform	One-on-One / Group Meeting
June 09, 2021	SBI Mutual Fund ICICI Prudential Mutual Fund	Virtual Platform	One-on-One
June 10, 2021	Axis Mutual Fund	Virtual Platform	One-on-One

Note: The above schedule is subject to change. Changes may happen due to exigencies.

A copy of the investor presentation to be made in the aforesaid meetings is enclosed for your reference and the same is also placed on the Company website i.e., www.garwarefibres.com.

Please acknowledge this communications.

Thanking You,

Yours faithfully,

For **GARWARE TECHNICAL FIBRES LIMITED**

Sunil Agarwal
Company Secretary
M. No. FCS6407

Registered Office

Garware Technical Fibres Ltd. (Formerly Garware – Wall Ropes Ltd.): Plot No.11, Block D-1, MIDC, Chinchwad, Pune 411 019, India
T +91 20 2799 0000/0306 E pune_admin@garwarefibres.com www.garwarefibres.com CIN L25209MH1976PLC018939

Better Ideas in Action



GARWARE
TECHNICAL FIBRES

www.garwarefibres.com

Garware Technical Fibres Limited – At a Glance

- Pioneer in Technical Textiles in India
- Great Place to Work certified.
- Approximately Rs. 6K Cr. market capitalization.
- Well qualified team of 22 scientists and 5 Ph.Ds
- Presence in 75 countries
- We produce 20,000 SKUs



Mission

“To Provide innovative,
application focused
solutions to enhance value of our
customers globally”



GARWARE
TECHNICAL FIBRES

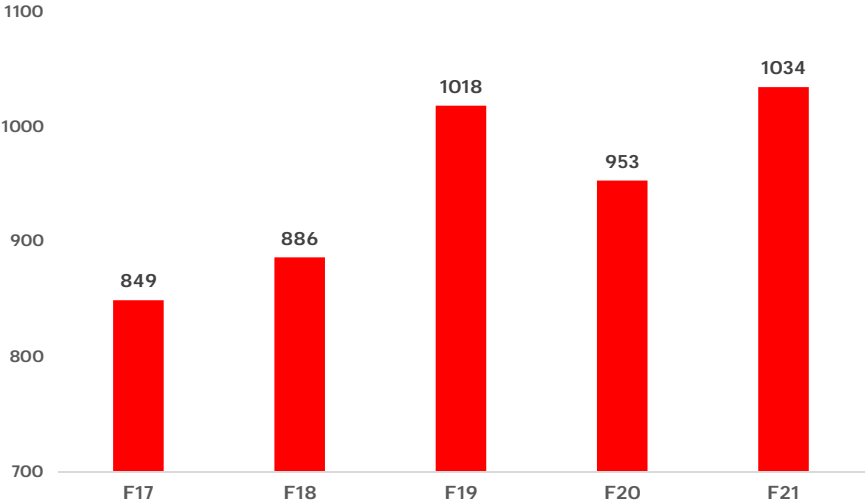


Our Four Pillars of Value

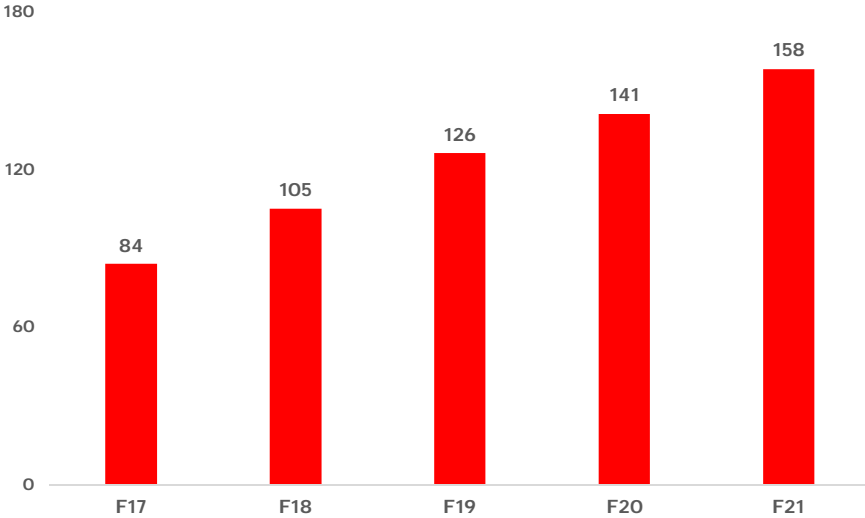


GTFL Financials

Turnover



PAT





GTFL Infrastructure



Manufacturing facility at Pune

Pune manufacturing facility conforms to ISO 9000:2015 standards and boasts state-of-the-art machinery

Products

Ropes
Rope Articles
PPMF Yarns

PPMF Twines
Geo Textiles
Metal Gabions

Cargo Nets
Gangway Nets



Manufacturing facility at Wai is the largest unit in India and spread across 40 acres

Wai manufacturing facility conforms to ISO 9000:2015 and ISO 14001:2015 standards and boasts state-of-the-art machinery

Products

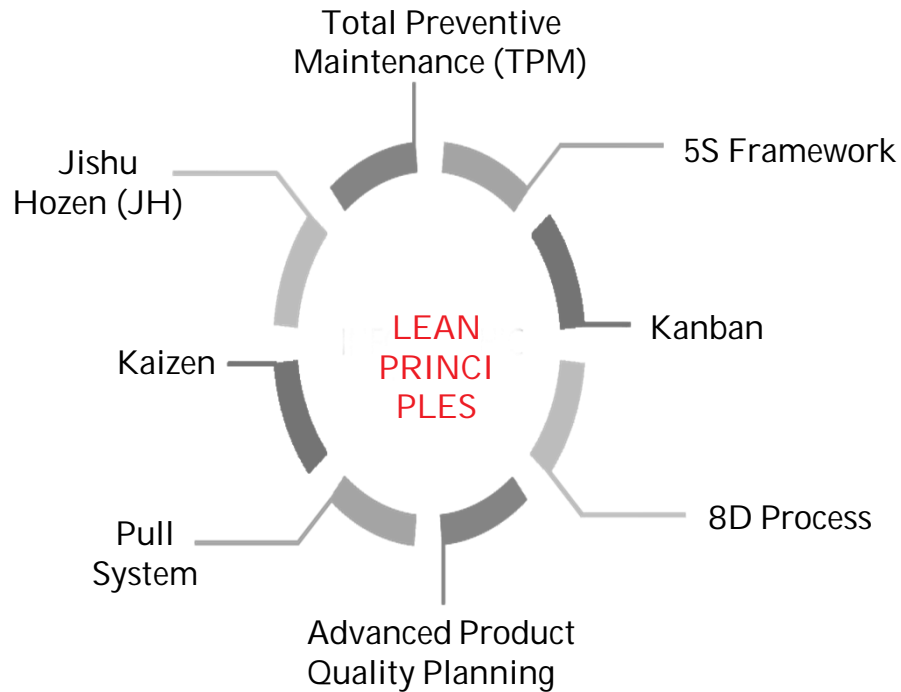
Aquaculture Cage Nets
Plateena (Dyneema)
Fishing Nets & Twines
Net Assembly

Sports &
Adventure Nets
Safety Nets

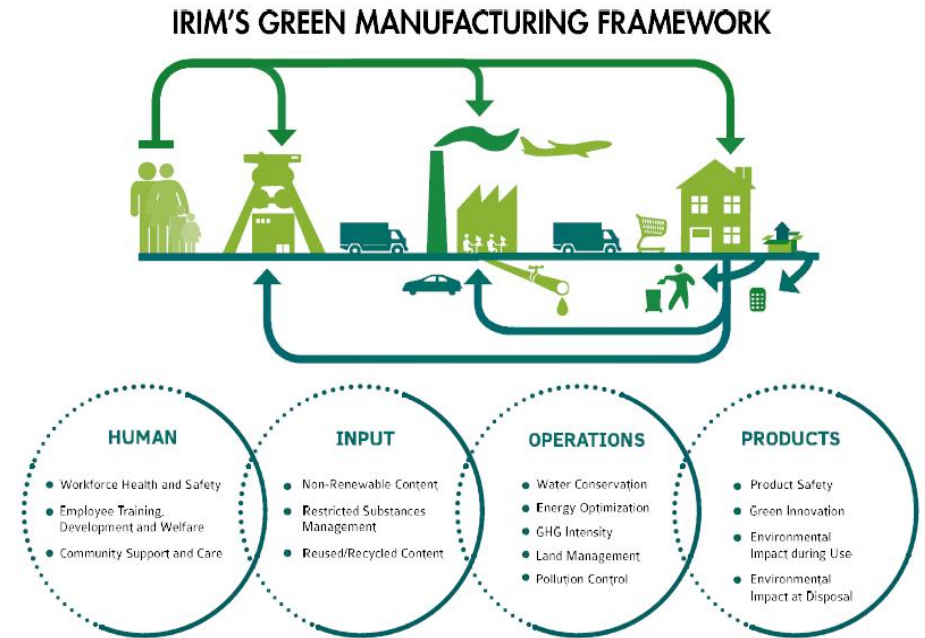
Agricultural Nets
Coated Fabrics



GTFL's Strong Focus on Manufacturing Excellence



Silver award – India Green Manuf. Certification Challenge





GTFL

Application Areas

Our Innovative, Application focused Solutions Portfolio...



Fisheries

- Fully assembled Trawls
- Purse Seine Nets
- Gill Nets
- Dole Nets
- Pelagic Nets
- Ropes & Twines



Aquaculture

- Cage Nets
- Predator protection Nets
- Anti Bird Nets
- Mooring System
- Sea Lice Solutions



Shipping & IPD

- 8 Strand Shipping Ropes
- 3 Strand Industrial Ropes
- Specialty Ropes
- 12 Strand Ropes
- Safety Nets
- Cargo Nets
- Braided Ropes
- Rope Articles



Sports

- Tennis Nets
- Volley Ball Nets
- Basket Ball Nets
- Ski Nets
- Cricket Nets
- Badminton Nets
- Golf Practice Nets
- Soccer Nets
- Batting Cages
- Handball Nets

Our Innovative, Application focused Solutions Portfolio...



Agriculture

- Anti Bird Nets
- Anti Hail Nets
- Shade Nets
- Sericulture Nets
- Floriculture Nets
- Insect Nets
- Grape Nets
- Crop Support
- Stacking Cord
- Banana Ropes



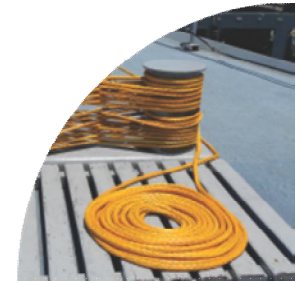
Geosynthetics

- Reinforced Soil Structures
- Landfill
- Coastal & River Protection
- Rock fall Protection
- Gabion Walls
- Geosynthetics Lining
- Erosion Control



Coated Fabrics

- Tarpaulins
- Hanger Covers
- Awnings
- Inflatables
- Biogas Covers
- Tents
- Pandals
- Pitch Covers/ Ground Covers



Plateena

- Aquaculture Cage Nets
- Mooring & Towing Ropes
- Trawl Nets
- Purse Seine Nets
- Conductor Cable Pulling
- Hot Line Stringing
- River Cross Cable Pulling



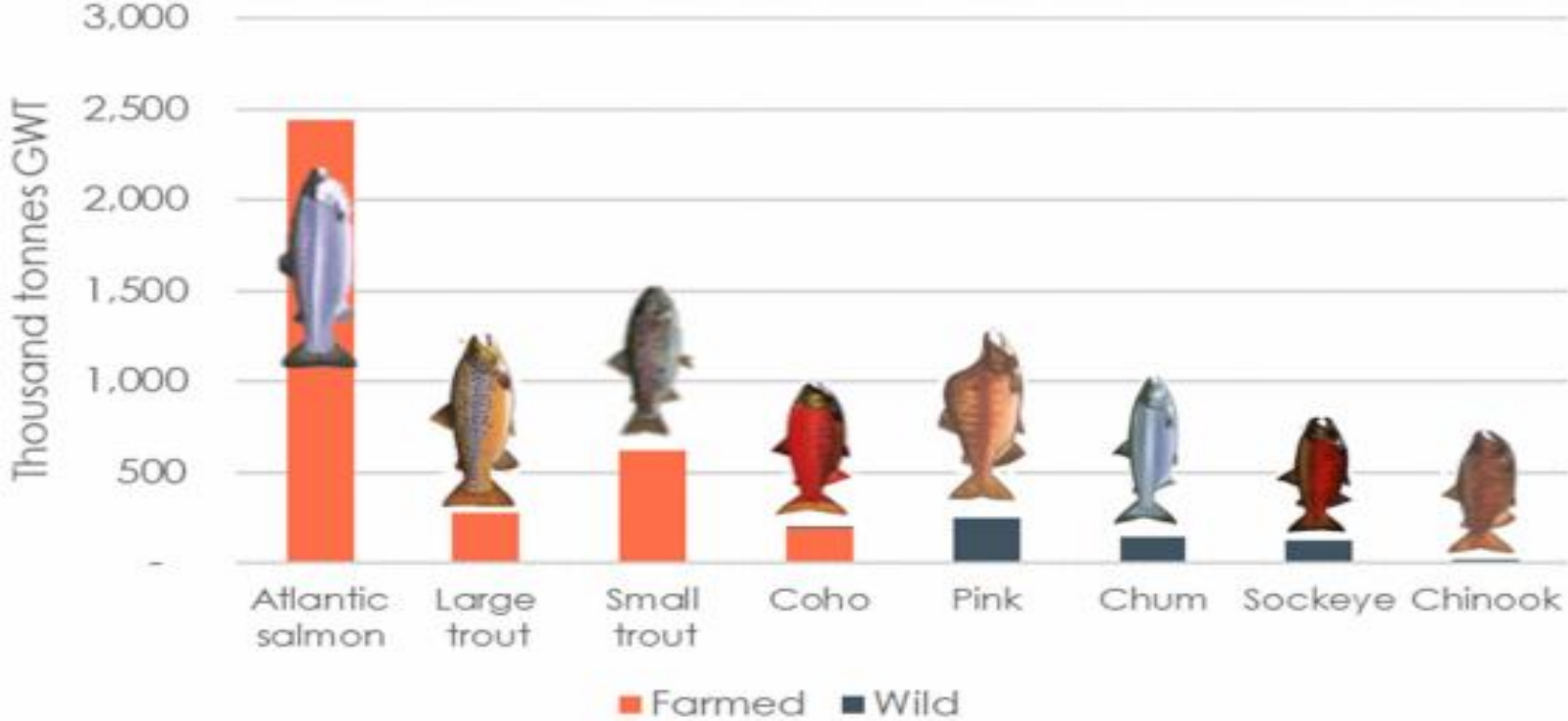
GTFL

Aquaculture
Business

Supply of farmed and wild salmonids



Salmonids Harvest 2020



Total harvest of Atlantic salmon 2001-2020



Salmon Industry

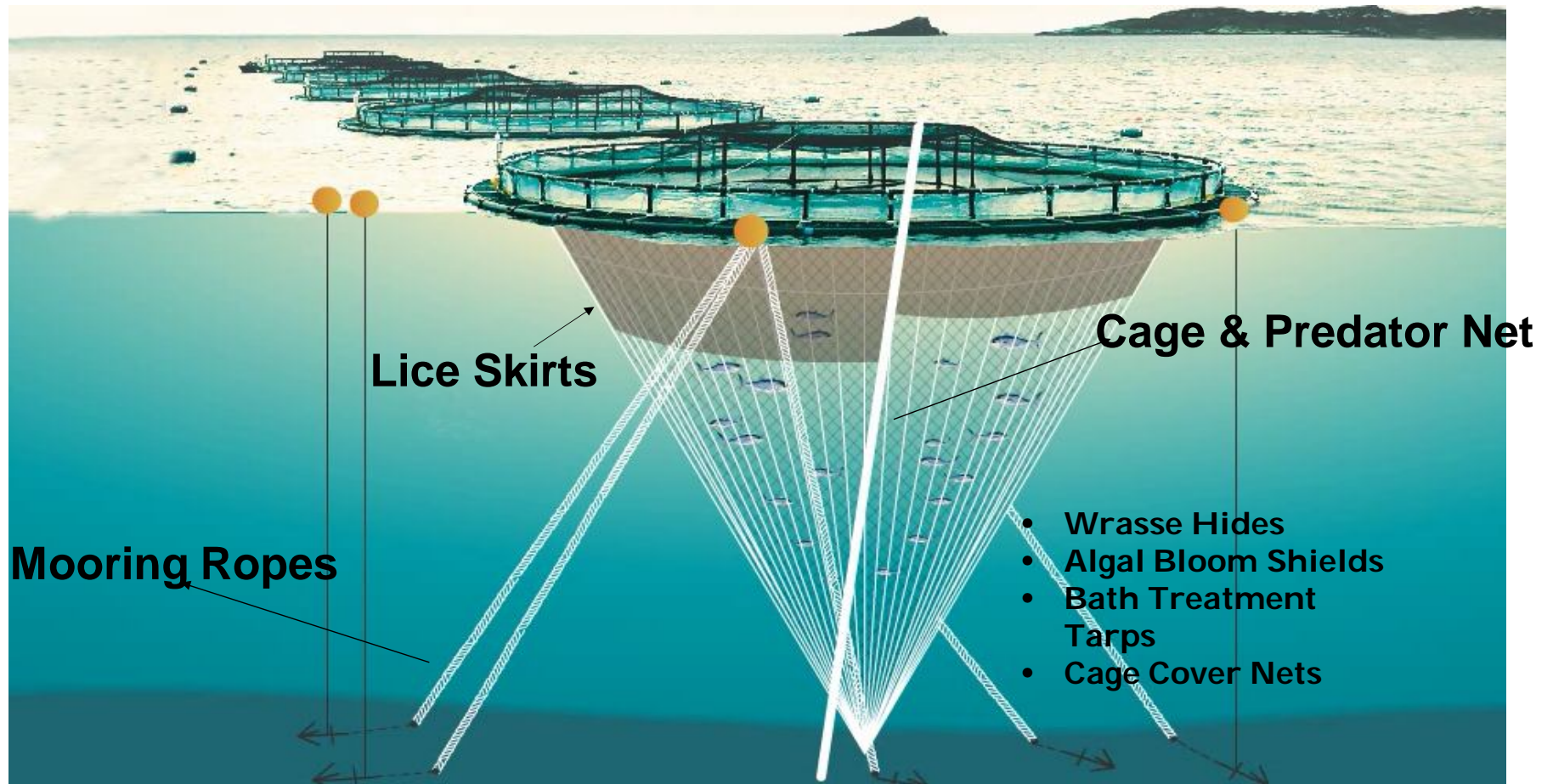
- Fish consumption per capita will rise from 20.5 Kg in 2016 to 21.3 Kg by 2027
- Salmon is the most efficient source of protein globally – feed to conversion ratio.
- The world is coming out of a pandemic lockdown and the hotel, restaurant, and catering market is set to enjoy a material rebound.
- Cruise industry to add another leg up on demand
- Oslo Seafood index near all-time highs and above the pre-pandemic levels of February 2020.
- The main cost-reducing factor for farmers will be reduced biological challenges through better sea-lice mitigation.

Aquaculture

- In farmed salmon aquaculture, each cage holds 800-1000 MT of salmon valued at USD 4-5 million (e.g. : 205m circumference * 35m depth/ 163m circumference * 55m depth)
- The cage nets used have to be extremely resilient to the currents, predators and also ensure no fish escape
- We are the No.1 supplier of cage for Salmon farming globally.



Holding Salmon Farmer's most Valuable Asset



Aquaculture Industry – Customer VOC Challenges

- Fish Escapes
- Carbon footprint
- Fish Health & Growth (Winter Ulcers)
- Bio Fouling & Sedimentation Management
- Sea Lice Management
- Predation

Top
Challenges in
Aquaculture

Fish Escapes & Predation – GTFL PE Solutions

Increased salmon farm protection leads to drop in seal culls

© 4 February 2019

f     Share



A salmon producer has reported seeing a reduction in seal culling after introducing new nets to keep them away from fish.

BBC article : <https://www.bbc.com/news/uk-scotland-47108133>

“Seal Pro netting was piloted at Orkney fish farms. No culls were required there.”

Drop in Seal Culls

Article Featured in BBC

Farmers can't shoot seals, so how do they keep their fish safe?? - Fishfarmer Apr'21

Seal strategies





Farmers can't shoot seals, so how do they keep their fish safe?

By Robert Duxan

One of the important functions of containment in aquaculture is to protect the fish in pens against predation by other creatures. The principal threat varies depending on where in the world the farm is sited – on Chile's Pacific coast it is sea lions, in Australia it is sharks and in Scotland and Norway, seals.

The options available to farmers in Scotland looking to protect their stock against seals are now more limited. Sea culling, which was available on a strictly controlled basis, is now virtually outlawed following changes to the Animals and Wildlife (Penalties, Protection and Powers) (Scotland) Act 2020. These removed live grounds – for the purpose of protecting the health and welfare of farmed fish and to prevent serious damage to fisheries and fish farms – under which Scottish ministers can grant licences to kill or take seals. The regulations mean, effectively, that farmers can no longer shoot seals as a last resort.

The regulations on acoustic deterrent devices (ADDs), which are designed to keep seals away from fish pens, have also been tightened up. All these changes on the part of the Scottish government have been brought in to ensure that exports of seafood to the United States can continue after 1 January 2023. This is the date from which the US Marine Mammal Protection Act (MMPA) will apply, meaning that the US will not import fish from jurisdictions where marine mammals are not sufficiently protected.

For farmers, however, the new regime presents a problem. The Scottish Salmon Producers' Organisation estimates there are more than 130,000 seals in Scottish waters, and they are intelligent and determined predators.

For sites where seal predation is a problem locally, operators are looking to ensure that their nets are up to the job of keeping the seals out.

In Ray Oman, Commercial Director with net supplier WMA Knox, says his company has been working on customised net solutions, though its partnership with Indian net-maker Garware Technical Fibres. These vary from nylon nets through to the patented, knitted HDPE (high-density polyethylene) Sapphire range.

Oman says: "Sapphire Seal Pro has been essential in that it has provided a single layered solution to predator exclusion. The twine size required can limit the mesh size available, but with the average low of salinity snouts forever increasing, this is generally not a problem. The Garware Sapphire range has been designed from the ground up for aquaculture, with single sided knots to minimise the potential of abrasion on the inside of the net and conversely, imitate the snouts of the seals on the outside with a raised knot profile.

"The Sapphire range for aquaculture also benefits from a concept that Knox refers to as 'Locked Geometry Technology', where the netting has inherent stiffness and is also heat-set to keep the mesh wide open on the square, preventing it from relaxing back to the diamond orientation as woven. This significantly helps the extension of small snouts and cleaner fish who may readily exploit a relaxed nylon netting that has pulled back into the diamond shape."

Garware has even invented a mechanical device, known as the Aqua Terminator, that can be adjusted to replicate different types of predator attack, to put its work through their paces. The device, which boasts a heinous set of jaws, can not only bite but also push and pull its target, simulating a real predator attack very convincingly.

Oman adds that the roping, tensioning and weighting specification of an anti-predator net are of prime consideration for suppliers and customers.

He explains: "The inherent stiffness of the Sapphire products restrict the effectiveness of seal attacks, as it is not as easy to grab a handful of this material as it is for nylon or Dyneema. To date, Sapphire Seal Pro has been very successful at reducing stress induced mortalities through seal attacks and at the same time almost eliminated breaches of the netting. Where there is a will there is a way and some sites have had challenges from dogfish nibbling on mortalities in the base of the net, damaging the twines. In these instances, Ultra-Cone is now being specified with further developments due to come to the market in the coming months."

Arthur Campbell, Team Lead, Exports with ARVA Group, says HDPE nets offer a good deterrent against predators although they can be less manoeuvrable, for example when they are being cleared.

“Even the best net needs the right tension”

"The inherent stiffness of the Sapphire products restricts the effectiveness of seal attacks, as it is not easy to grab a handful of this material as it is for Nylon or Dyneema.

Till date Sapphire Seal pro has been very successful at reducing stress induced mortalities through seal attacks and at the same time almost eliminated breaches of the netting."

https://issuu.com/fishfarmermagazine/docs/fish_farmer_april_2021_830aa1a3f5734b



A large red graphic element on the left side of the page, consisting of a solid red rectangle that curves smoothly into a white semi-circular shape on the right.

GTFL
Marine Fisheries
&
Agriculture

Fisheries

- Capture fishing is a traditional business in India but has evolved globally
- The trawling vessels range from 200-300 HP in India to 18000 HP in global markets

India



Up to 300 HP

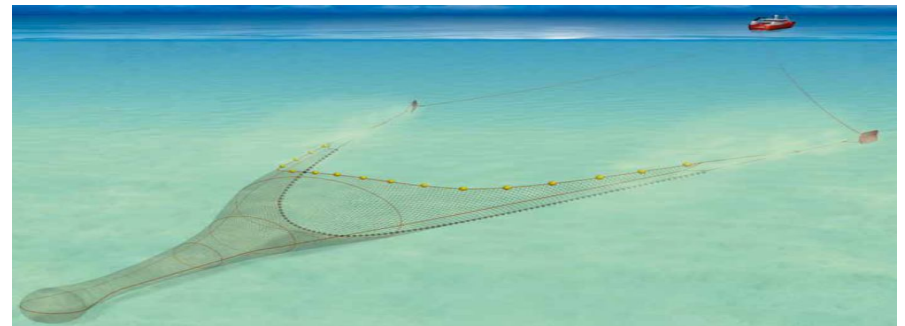
Global



Up to 18,000 HP

Fisheries

- In India, fisheries provides employment to 1.4 million people
- Our nets are customized for various applications.
- Our nets enhances scope for increased fish catch and reduces fuel consumption.



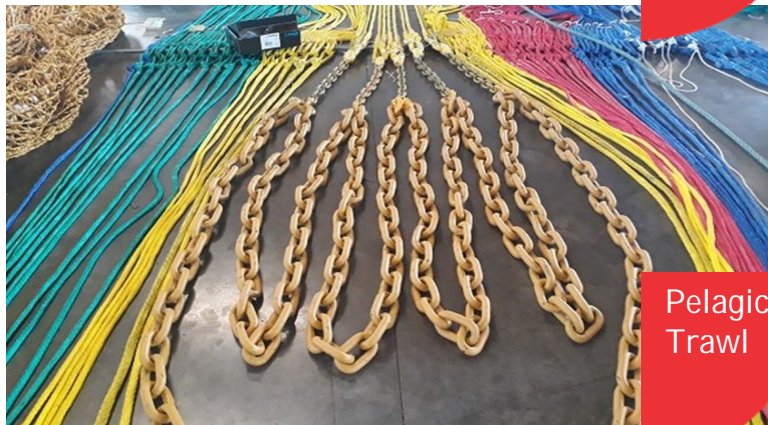
International Fisheries



SNG
bottom
Trawl



SNG
made
Trawl



Pelagic
Trawl



Pelagic
Trawl

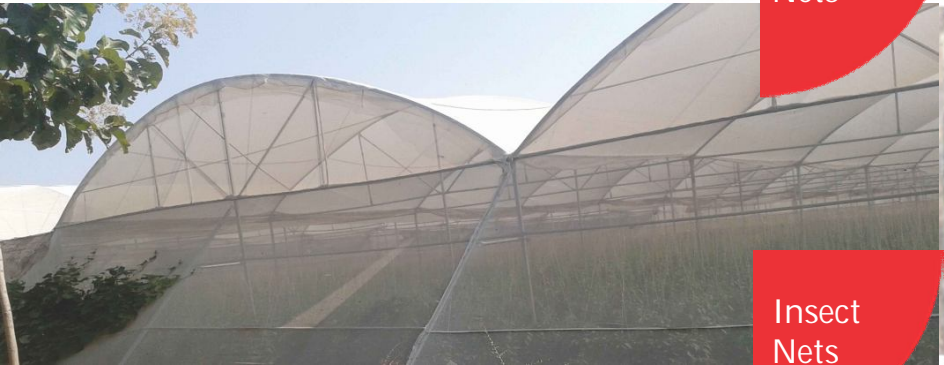
Agricultural Solutions



Shade Nets



Anti-Bird Nets



Insect Nets



Anti-Hail Nets

GTFL offers high-quality, UV-stabilized Agriculture Nets for variety of applications

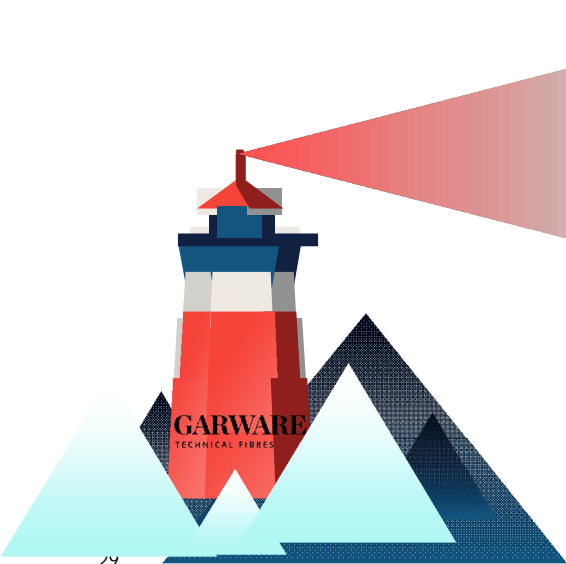
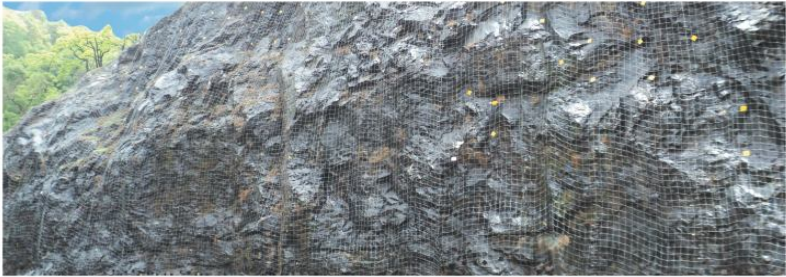


GTFL
Geo-synthetics
Business

Geosynthetics – A Brief Overview

Geosynthetics are polymer-based materials used in infrastructure solutions for environmental friendliness and lower overall cost

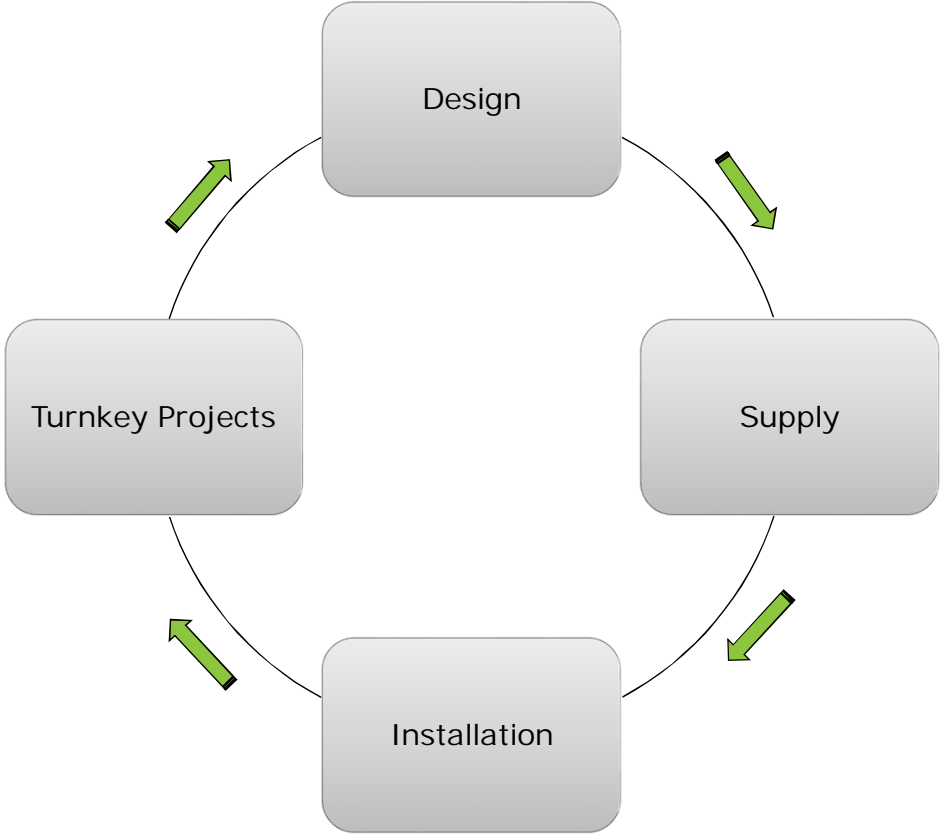
- Roads
- Railways
- Airports
- Ports



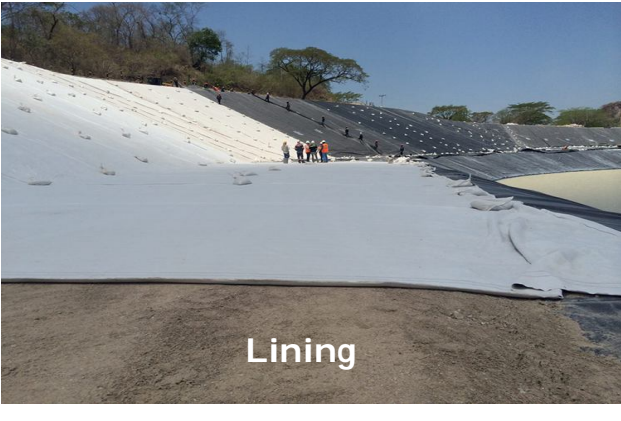
Geosynthetics - Benefits



Geosynthetics – Business Model



Focused Applications



Experienced Management Team



Mr. Vayu R Garware
**Chairman & Managing
Director**

- Graduate from Wharton Business School, USA
- Dynamic & Aggressive Leader



Mr. Shujaul Rehman
Chief Executive Officer

- Over two decades of experience in FMCG sector
- Strategic thinker and an aggressive marketer

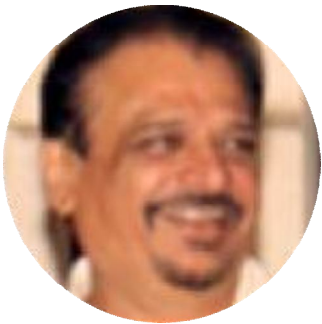


Mr. Mukesh Surana
Chief Financial Officer

- Over 2 decades of global experience in the entire gamut of finance, accounts, taxation, commercial and information technology
- Experience in the fields of Business strategy, M & A, Investor relations, Overseas operations and cross border structures



Experienced Management Team



Mr. P S Kamat
President –Operations

- More than 30 years of experience in manufacturing sector
- Expert in operational excellence & lean management systems



Mr. S V Raut
President -Technical and New Businesses

- More than 35 years of global experience in technical textiles
- Innovative thinker with in depth practical expertise



Mr. Vivek Kulkarni
President–Operations

- More than 30 years of valuable experience in manufacturing
- An expert in operations and operational excellence



Mr. Ravendra Mishra
Head-Human Capital

- More than 25 years of experience in operations & HRM
- An administrator par excellence with strong management skills

Better Ideas in Action

INDIA • USA • UK • CANADA • AUSTRALIA • CHILE • NORWAY

www.garwarefibres.com

Thank You

