



Date: 14th June, 2024

To
The Manager,
Listing Department,
BSE Limited,
PJ Towers, Dalal Street,
Mumbai - 400 001.

Scrip Code: 543547/ ISIN: INE0HR601026

Dear Sirs

Sub: Presentation as placed at Analyst / Institutional Investor meetings held on 12.06.2024
Ref: Regulation 30 of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015

Pursuant to Regulation 30(6) of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015 ("SEBI Listing Obligations") read with Part A of Schedule III to the SEBI Listing Obligations, we wish to inform you that the event Market Marvel Series – 21st Edition hosted by PhillipCapital (India) Private Limited in respect to Analyst/Investors Meeting with the Company was held on 12.06.2024, as per schedule intimated vide Letter dated 07.06.2024.

The presentation used by the Management team at the said event is enclosed herewith and the same will also be available on the website of the Company at www.ddevgroup.in.

No unpublished price sensitive information pertaining to the Company was shared with the Analysts/ Investors.

This is for your information and records.

Thanking You,

Yours faithfully,

For **Ddev Plastiks Industries Limited**

Tanvi Goenka (Membership No. ACS 31176)
Company Secretary



Ddev Plastiks Industries Limited

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CIN : L24290WB2020PLC241791



Ddev Plastiks Industries Limited
Leading Manufacturer Of Compounds

Earning Presentation
Q4FY24

Visit Our Website
www.ddevgroup.in 

Disclaimer



This presentation contains statements that contain “forward looking statements” including, but without limitation, statements relating to the implementation of strategic initiatives, and other statements relating to Ddev Plastiks Industries Ltd.'s (“Ddev Plastiks” or the Company) future business developments and economic performance.

While these forward looking statements indicate our assessment and future expectations concerning the development of our business, a number of risks, uncertainties and other unknown factors could cause actual developments and results to differ materially from our expectations.

These factors include, but are not limited to, general market, macro-economic, governmental and regulatory trends, movements in currency exchange and interest rates, competitive pressures, technological developments, changes in the financial conditions of third parties dealing with us, legislative developments, and other key factors that could affect our business and financial performance.

Ddev Plastiks Industries Ltd undertakes no obligation to publicly revise any forward looking statements to reflect future / likely events or circumstances.



About Us
4-10

Ddev Plastiks : India's Largest Manufacturer of Polymer Compounds



- 4 Decade of Operations - current capacity **2,37,500 MTPA (as of April, 2024)**.
- **5 manufacturing units** with state-of-the art machinery, infrastructure, equipment, and R&D facilities.
- Diverse product portfolio with more than 200+ compounds.
- **Proven track record: FY20-FY24 CAGR**
Revenue - 9%, EBITDA - 36%, PAT-60%
- India's largest and leading manufacturer of XLPE compounds, product portfolio further extended to High Voltage PE based Cable Compounds and HFFR Compounds.

FY24 Financial Performance

Rs.2,431 cr

Revenue

28%

ROE

Rs.282 cr

EBITDA

11%

EBITDA Margin

Rs.182 cr

PAT

7%

PAT Margin

CRISIL A/Positive & CRISIL A1

Long term & Short term Credit Rating

~INR 300cr

Capex
Over the next three years

200+

Products

400+

Employees

50+countries

Geographical Presence

Note: EBITDA includes Other Income. ROCE is calculated as Earning before Interest and Tax divided by Capital Employed (i.e. Total Assets less Current Liabilities). ROE is calculated as Profit after tax divided by Total Equity (i.e. Equity Share Capital+ Reserve and Surplus+ Money Received against Share Warrants). Net Debt to Equity is calculated as Long and Short-term borrowing less Cash and Cash Equivalents divided by Total Equity.

Q4 and FY2024 Management Commentary

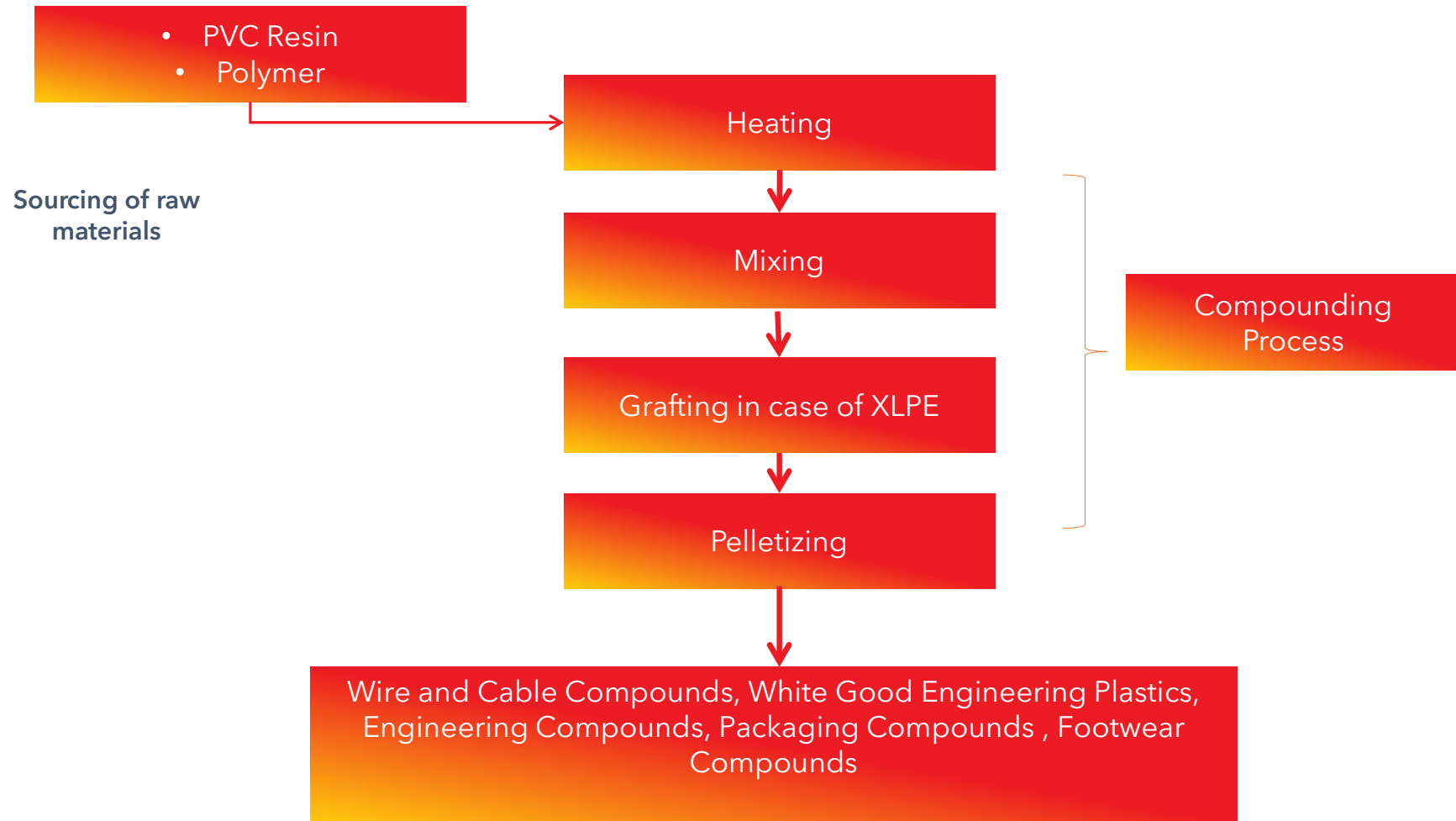


Commenting on the Performance, Narrindra Suranna, Chairman and Managing Director said:

I am excited to share another exceptional fiscal of strong performance. We achieved a remarkable 52% EBITDA growth yoy expanding the margin to 12% in FY24; this has been the first year post the de-merger we were able to record a double-digit EBITDA Margin and aim to sustain it in the coming years as well. In the current fiscal Net profit (PAT) grew substantially by 75% to Rs182cr, solidifying our strong financial performance.

As we move forward, we remain committed to leveraging our operational strengths, fostering innovation, and strengthening our market presence and creating superior Stakeholder value .

Our Business Model



Key USP's

01

Operating in five high growth categories.

02

Diversified Revenue Structure; Leading supplier of cable compounds in India

03

Multi-location setup minimizing transportation costs.

04

Strong R&D Infrastructure.

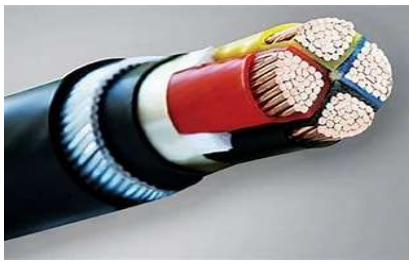
05

Customisation of products with 200+SKU's.

06

Highly competitive globally.

Operating in 5 High Growth Categories with 200+SKU's



Antifab/Filled Compounds/Master Batches

- Widely used in packaging industry like woven bag and cement bag.
- Ddev Plastiks stands as the leading organized player in the highly fragmented unorganized market.
- Margins- ~3-5%

PVC Compounds

- Niche product with high margin business.
- Widely used in Wire & Cable Industry, Construction Industry.
- **Global polymer compounding market is expected to reach USD115bn by FY30.**
- Margins- ~4-6%

Sioplas/XLPE Compounds/Semicons

- Global leader in XLPE and EHV compounds since 1980.
- Only player in country to offer products from the range of 66kv to 132kv.
- Major revenue contributor. **~50% market share in Sioplas and ~33% in XLPE compounds.**
- Margins- ~8-12%

Engineering Plastic Compounds

- Widely used in White Goods and FMEG Industry.
- High growth market with very limited players in India.
- **White Goods market is estimated to cross \$21bn by 2025 expanding at a CAGR of 11%.**
- Margins- ~10-15%

Halogen Free Flame Retardant (HFFR)

- Amongst the two producers of HFFR in India.
- **Sunrise sector with demand anticipated to reach from ~700tn to ~1,000tn over the next couple of years.**
- Margins: 10-12%

Our Organization & Business Structure



Value unlocked by the de-merger

Post Demerger Organization & Business Structure

Kkalpana Industries (India) Ltd

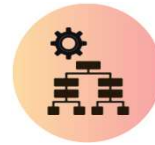
Demerger Ratio 1:1

Kkalpana Industries
(Listed on CSE & BSE)

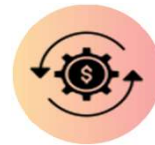
Ddev Plastiks
(Listed on BSE)

Reprocessing & Recycling
Business

Polymer Compounding



Simplified Corporate Structure



Maximizing Shareholders Value

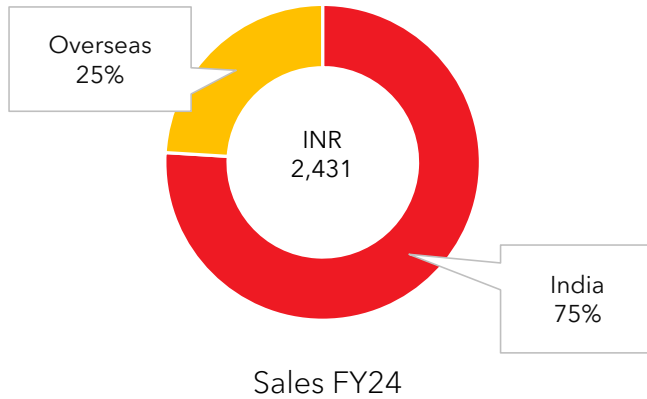


Focused Operations

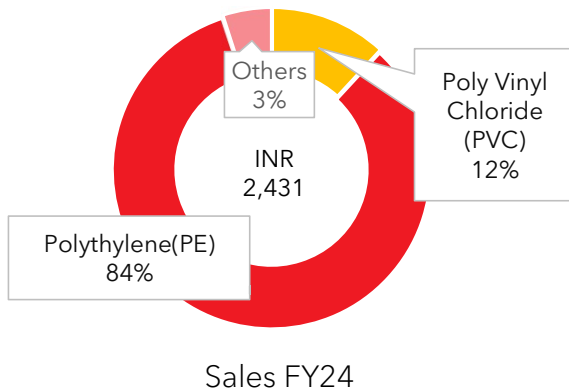
Largest Supplier of Cable Compounds in India



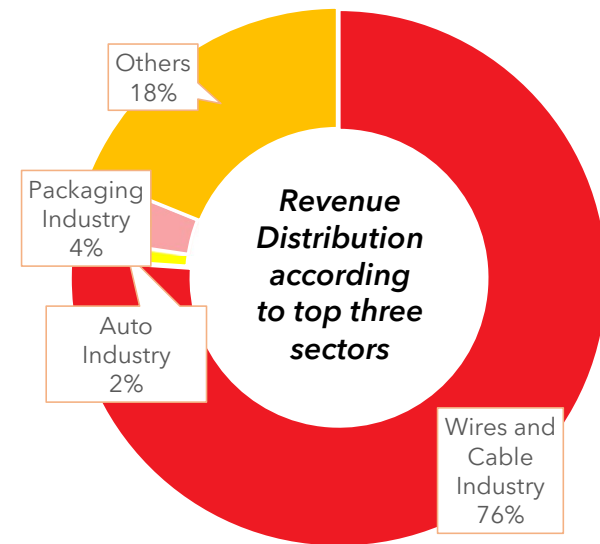
Revenue by Geography (INR Cr)



Revenue by Product Category (INR Cr)



Revenue distribution by sector (%)



Polymer compounding is a preferred material to electrical industry due to properties such as electrical insulation, corrosion inhibition, excellent heat resistance, high tensile and durability and low density.

Apar, Havells, KEC, KEI, Paramount and Polycab contribute to ~22% of Total Revenue.



Investment Thesis

12-27

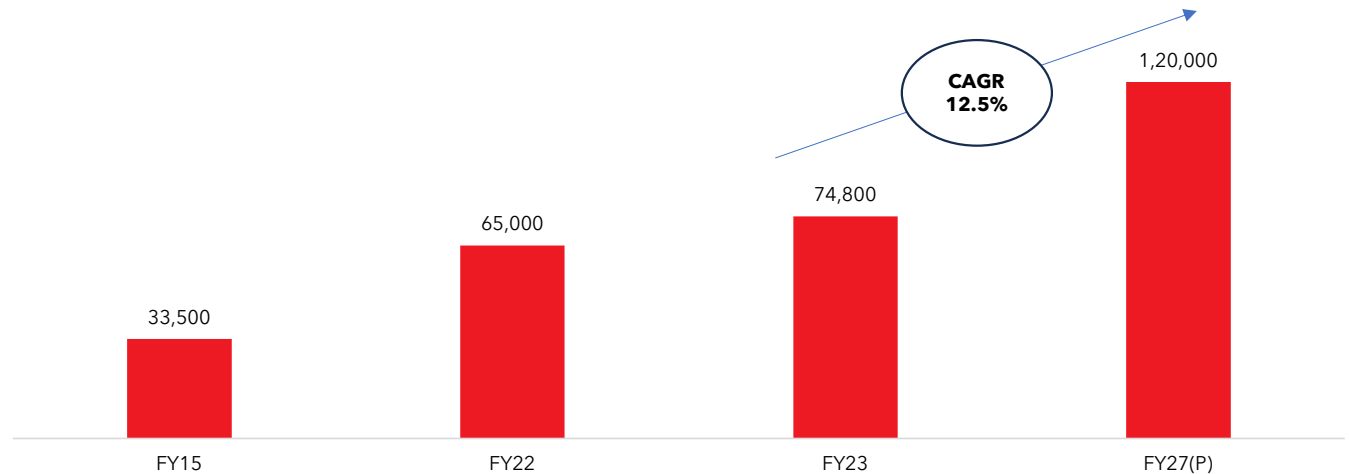
Renewables has emerged as the new unprecedented catalyst

Polymer compounding is a preferred material to electrical industry due to properties such as electrical insulation, corrosion inhibition, excellent heat resistance, high tensile and durability and low density.

817 GW India's power requirement by 2030

50% Cumulative electric power installed to be green by 2030

Transmission Market ~INR60,000cr



Anticipated growth in the Indian Wire and Cable Market Value (INR Cr)

- ~2.5ltpa size of cable compounding industry in India; ~1/3rd of market share with Ddev Plastiks.
- Direct co-relationship cable industry growth and demand for Polymer Compounds.

Sectoral Tailwinds to support growth



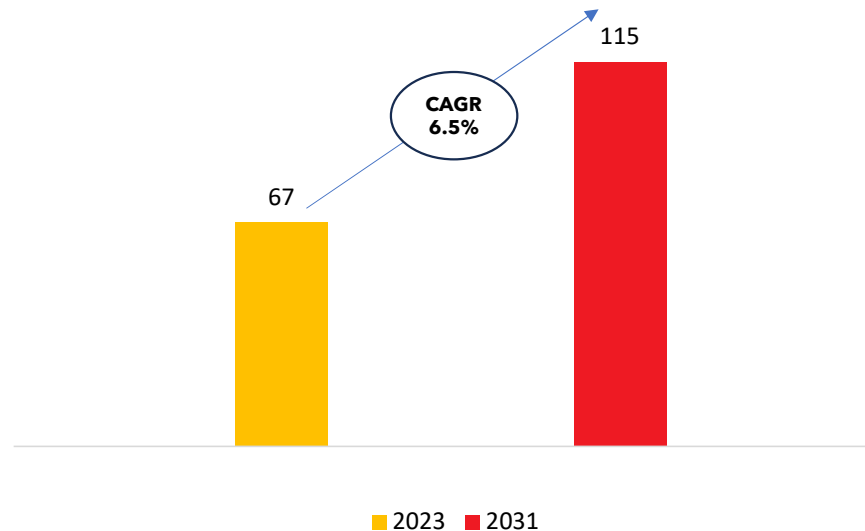
Demand

- Urbanization
- Changing consumer behavior
- Increasing per capita income
- Premiumization
- GDP growth

Sectoral ripple effect

- Renewable Energy
- Wires and Cables
- Electric mobility
- Real Estate
- Infra push
- Furniture applications

Global Polymer Compounding Market Growth (in USD bn)



Government Polices

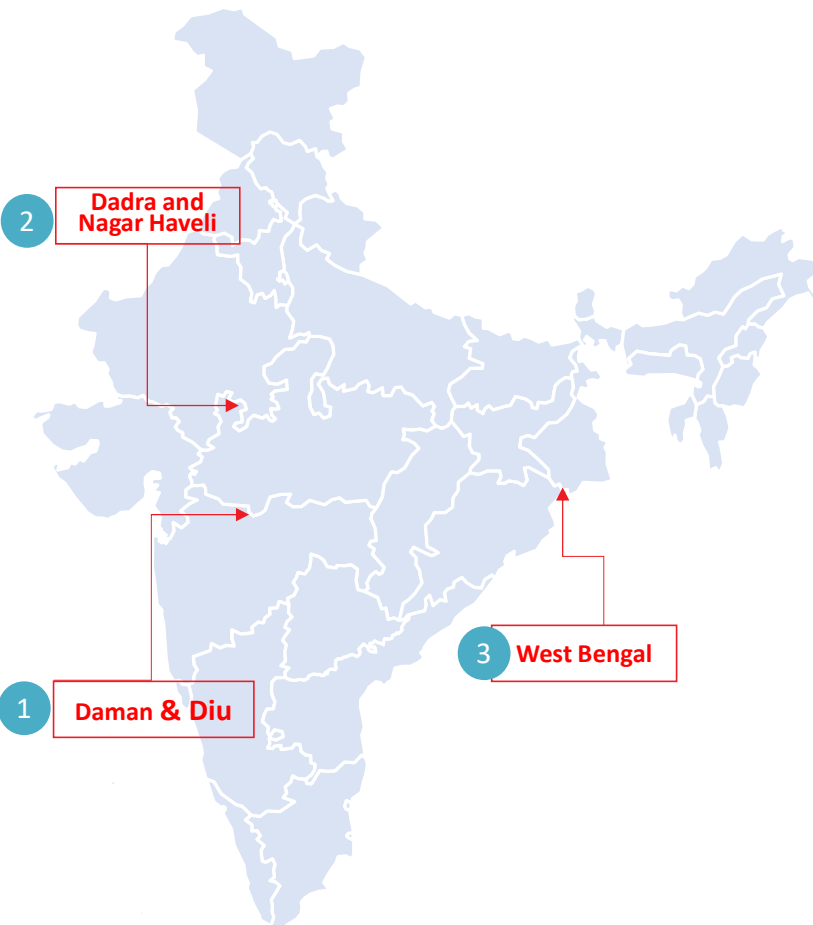
- National Infrastructure Pipeline
- Har Ghar Bijlee
- Capex cycle uptick
- Electrification
- Smart cities
- Plastic Parks

Global Trends

- Substitution effect for natural raw materials.
- Industrial applications
- China +1

The current opportunity landscape presents a fertile ground for businesses to achieve exponential growth in the medium-to-long term

Strategically located manufacturing capabilities



Name of the Plant	Products manufactured	Installed Capacity (MTPA)
Dhulagarh - West Bengal	Anti fibrillation Compound	12,000
	Sioplas & Semicon	15,000
	PVC Compound	6,000
Silvasa - Dadra Plant 1	PVC Compounds Cables	38,000
	HFFR	5,000
Silvasa - Dadra Plant 2	Semicon Compounds	2,500
Daman, Daman & Diu	EP Compounds	14,500
	Anti fibrillation Compound	8,500
Surangi, Dadra and Daman, UT	Semicon	8,400
	Sioplas	92,600
	Peroxide	35,000
Total		2,37,500

- **Largest manufacture of polymer compounds in India with Installed capacity of 2,37,500 MT**
- **Five modern state of art manufacturing plants** situated in the state of West Bengal, Daman & Diu and Dadra & Nagar Haveli
- Strategically located at both East & West coast of India results in lower freight costs
- **World class R&D** set up under the supervision of highly competent professionals
- **Science & technology collaboration with leading institutes** like IIT Kharagpur, University Institute of Chemical Technology (Mumbai) etc.
- Judicious choice of equipment from Germany, Switzerland, Italy, Taiwan etc.

Strong R&D Infrastructure

Strong R&D Capabilities enabling innovation and new products launches



R&D centre at Surangi

Product Pipeline

- XLPE Compound suitable for Insulation for Cables upto 132kv to be launched in the next few month.
- Next focus would be going up to 220Kv.

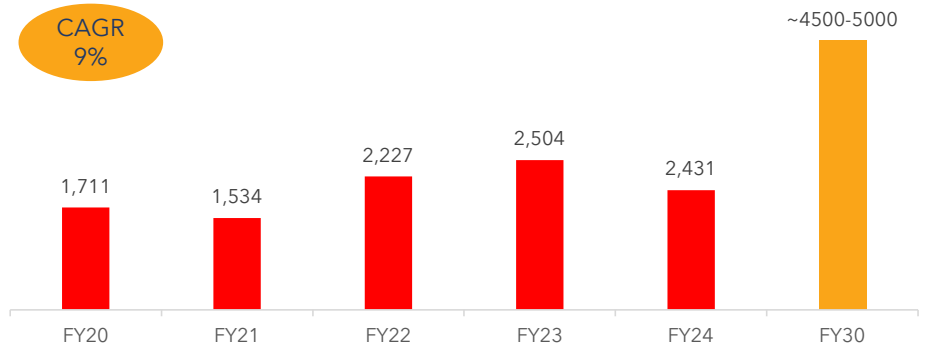
Powered by robust R&D

- Experienced R&D Engineers.
- Certificates from Domestic and International Labs.
- Large R&D center at Surangi

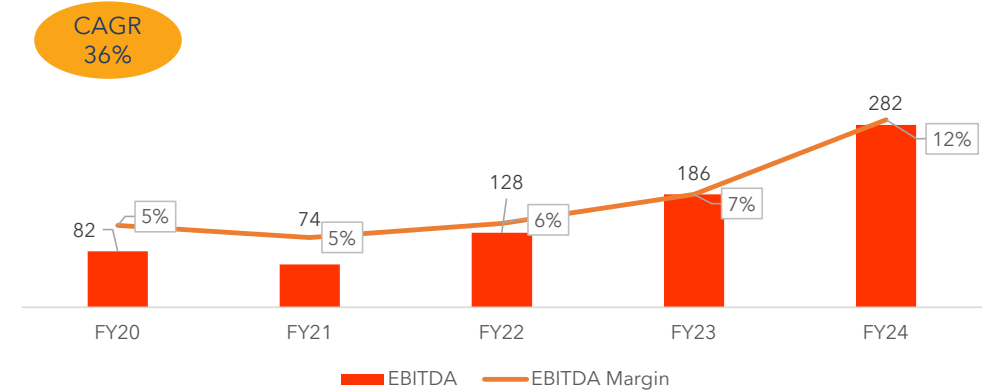
Profit 6x in 5 years: Focus on High Margin Products



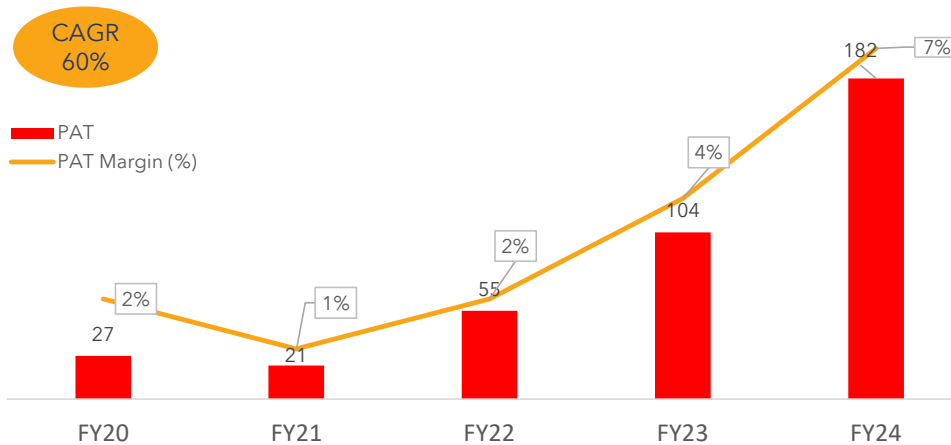
Net Revenue (INR Cr)



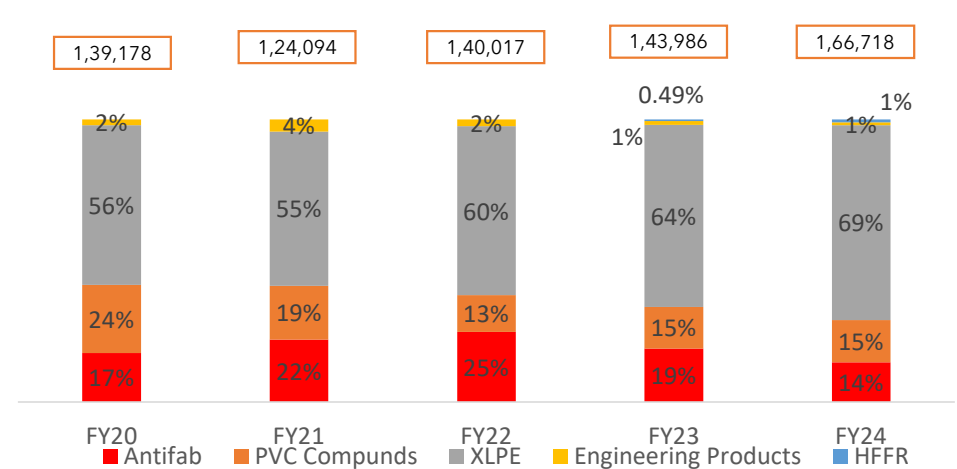
EBITDA (Rs Cr) & EBITDA Margin %



PAT (INR Cr) & PAT Margin %



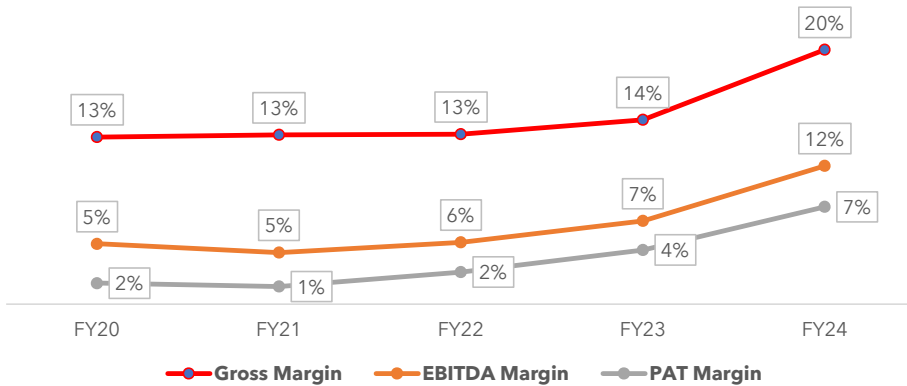
Production Volumes (in MT) & Product Wise Volume Split (%)



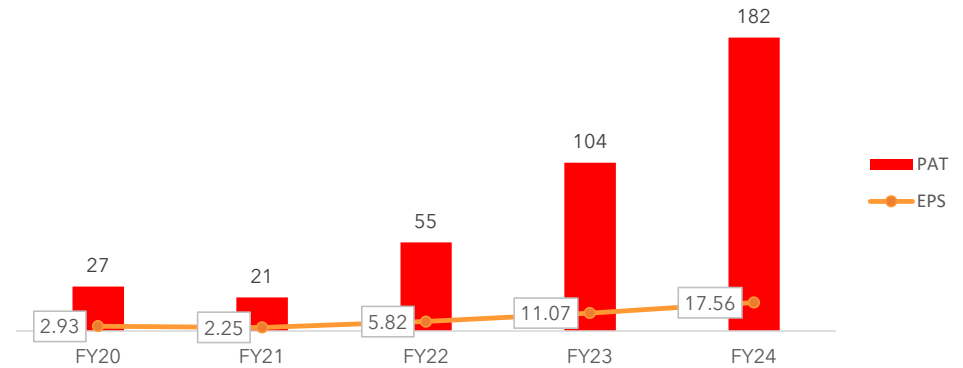
Focus on shareholder value creation



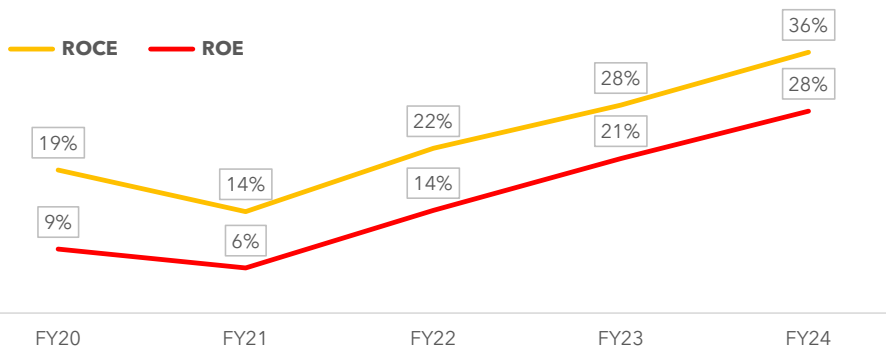
Margins (%)



PAT (INR cr) and EPS (INR per share)



Return Ratios (%)

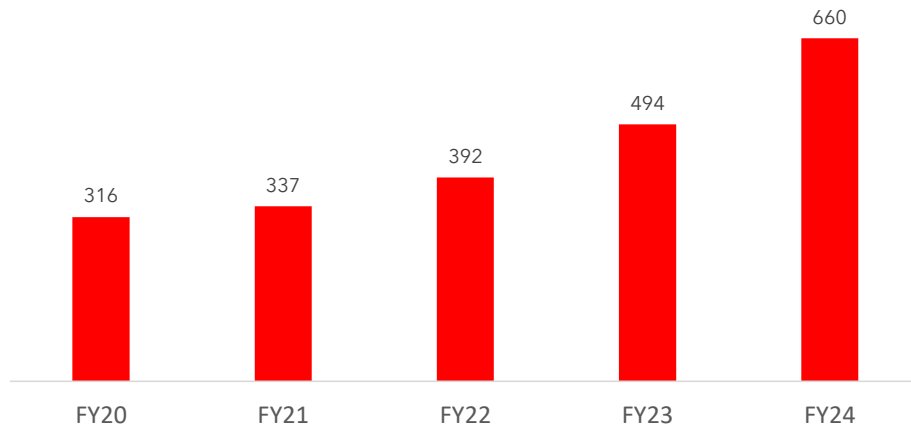


- Our margins have improved as we move towards more value-added high growth products.
- PAT has grown at CAGR of 60% from FY20-24 and EPS has grown 5.99x
- Strong return ratios has translated into superior wealth creation.

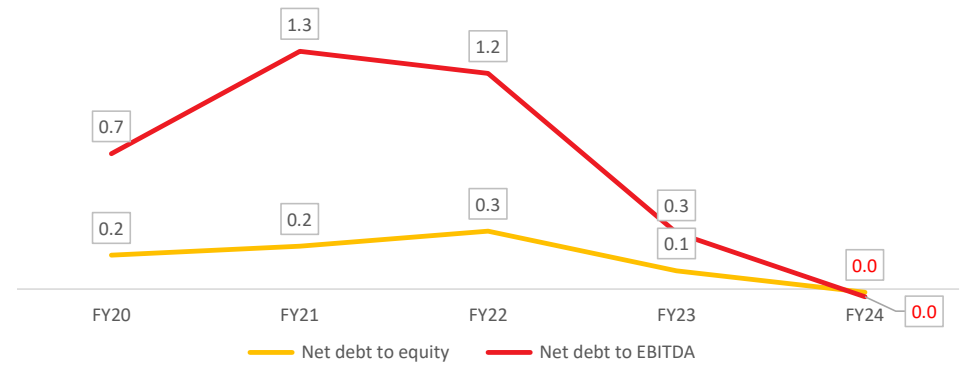
Note: ROCE is calculated as Earning before Interest and Tax divided by Capital Employed (i.e. Total Assets less Current Liabilities). ROE is calculated as Profit after tax divided by Total Equity (i.e. Equity Share Capital+ Reserve and Surplus+ Money Received against Share Warrants). EBIT and EBITDA margin include Other income.

Strong Balance Sheet to support future growth

Net-worth (INR cr)



Leverage Ratios



- Strong Balance to support capex plans of ~INR300cr to be done in staggered manner over the next three years via brownfield expansion of existing manufacturing facilities.
- We became net debt-free in 4QFY24 and are committed to maintaining this status through FY25.

Credit Ratings



Long Term Rating

A/Positive

Short Term Rating

A1

Strategic Priorities



1.

Strong focus on new product development

- Pioneering Product Launches on the back of strong R&D.
- Penetrating further in HFFR segment



2.

Maximizing Operating Leverage

- Capacity and Capability enhancements.
- ~INR300cr of Capex target over the next three years.



3.

Stakeholder value creation

- Profitable growth and sound Balance Sheet.
- Focus on being Net debt free by FY25.

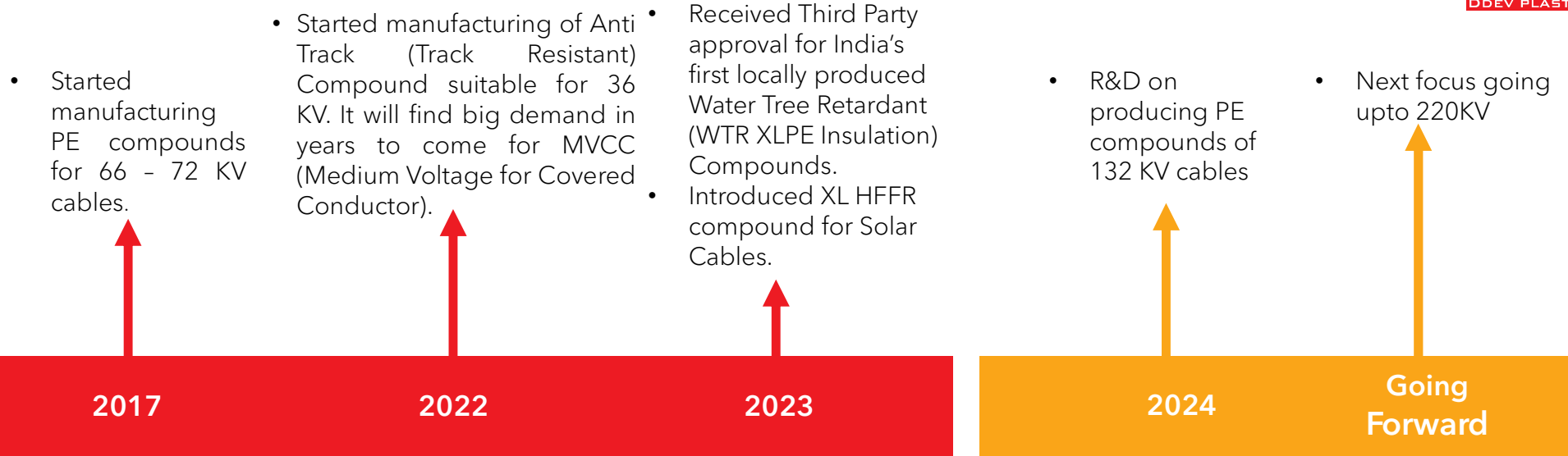


4.

Market Penetration

- Improve presence in domestic and overseas markets.
- Collaborative efforts with domestic and international customers to develop enhanced products.

Pioneering Product Launches Powered by Extensive R&D



WTR XLPE (Water Tree Retardant XLPE) for the insulation of cables (72kv application) was primarily imported, however, DPIL has introduced an exceptional version that has successfully passed a long-term test at a third-party laboratory

- A **novel compound** highly effective in reducing the growth of electrical treeing caused by water, making it a superior choice for insulation purposes.
- Successfully passed a two-year test on cable at a prestigious VDE laboratory, Germany.
- Reduced treeing result in better service life of the cable resulting into **better returns for electrical distribution companies.**

Note- Ddev Plastiks Ltd was part of Kkalpana Industries Ltd until 2022.

HFFR

5,000 MTPA
FY23



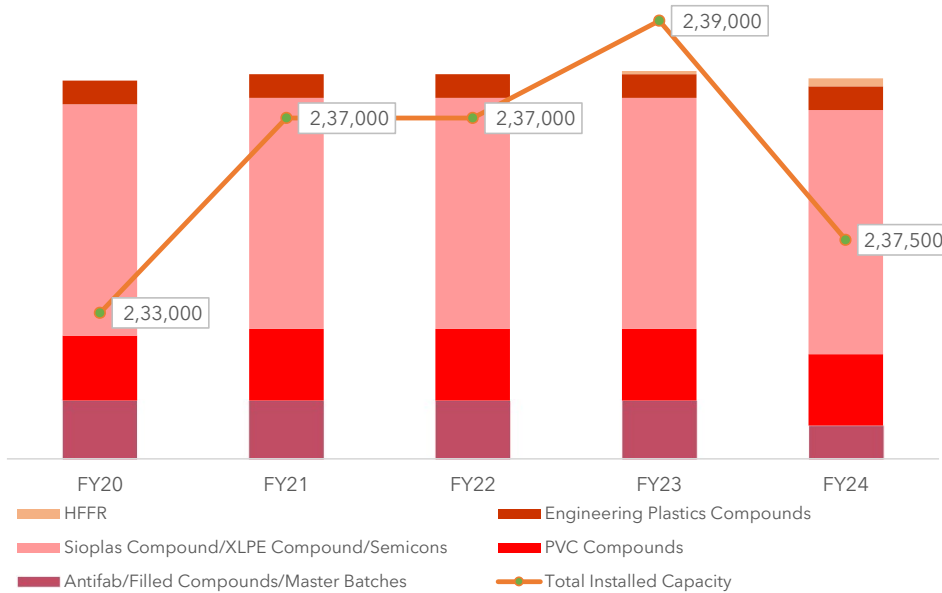
20,000 MTPA
FY26

- The HFFR market is poised to grow 7x from ~28,000 MT as of today to ~2 lakh MT by FY30.
- It is expected to replace fast PVC House wiring cables and the govt mandate has already come to use/replace in all public places.
- We would increase our HFFR capacity in a staggered manner to reach 20,000 MTPA by FY26.

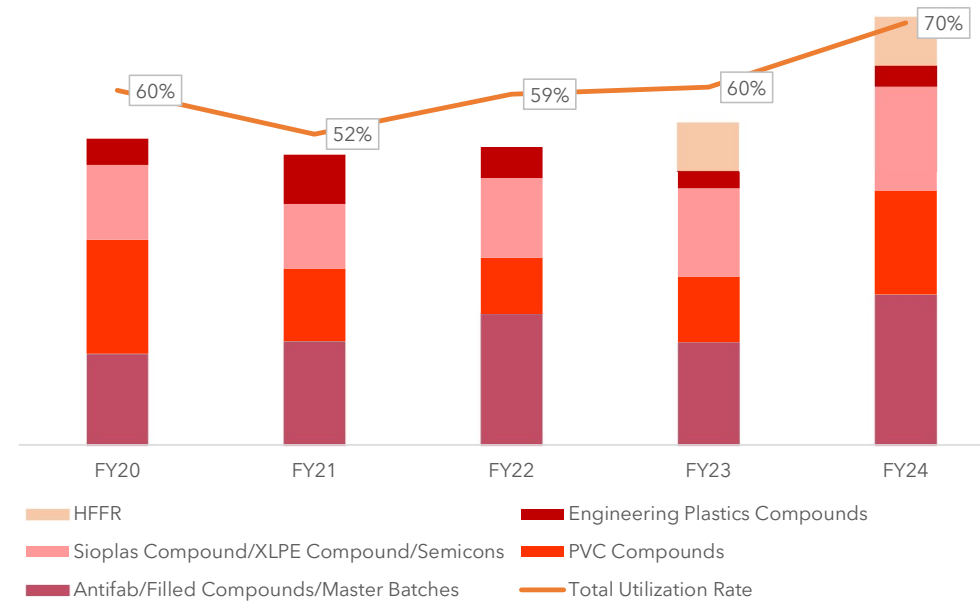
Higher Capacity Utilization and Addition to drive future growth



Installed Capacity (MTPA)



Utilization (%)

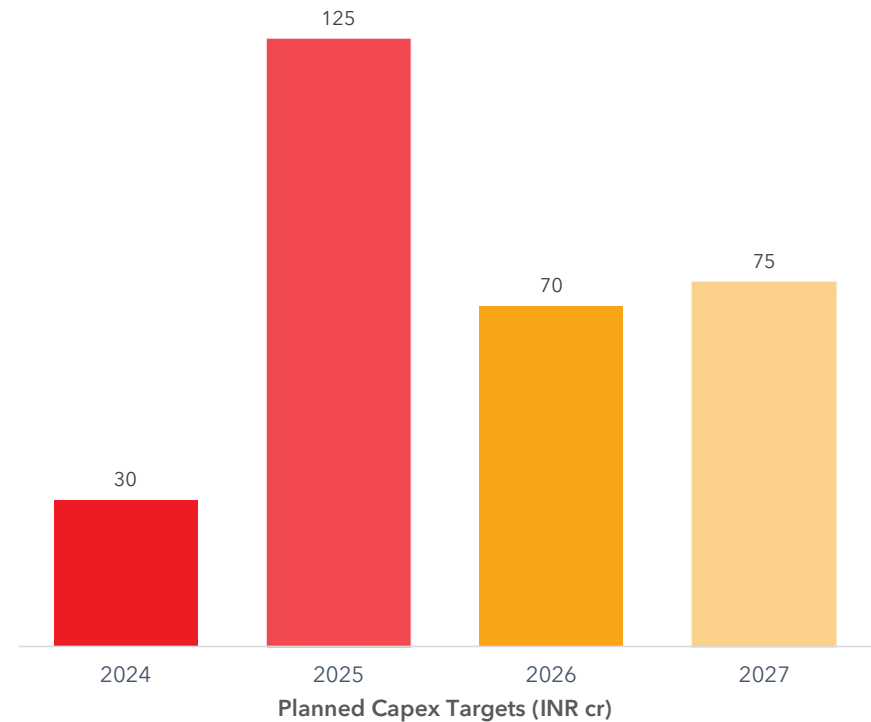


- High demand for Sioplas and XLPE/Sioplas compound from Wire and Cable Industry over the next decade.
- Full capacity utilization by FY26.
- INR300cr of capex to be incurred over the next three year.
- Decreasing utilization rates of PVC compounds and increasing utilization rates of XLPE compounds as the company reduces exposure from low margin commodity products to value added high margin products.

Capex



- **2024:**
Expansion of HFFR compounding capacity by 5,000 MTPA.
Debottlenecking.
- **2025:**
New Greenfield Site at East & West
Debottlenecking.
- **2026:**
Expansion of HFFR compounding capacity by 15,000 MTPA.
Building space for further capacity for all compounds.
- **2027:**
Expansion of PE compounding capacity by 25,000 MTPA.



Operational Performance



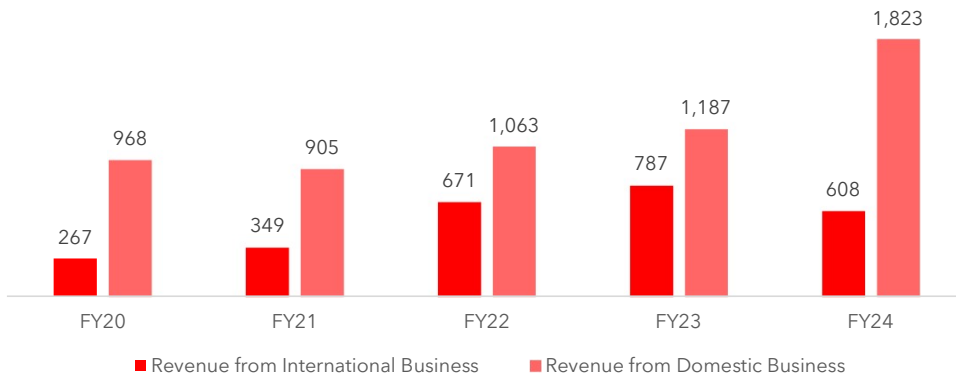
FYE March,	FY20	FY21	FY22	FY23	FY24
Antifab Installed Capacity	50,000	50,000	36,000	36,000	20,500
% Utilization	48%	55%	96%	76%	111%
PVC Compounds	40,000	44,000	44,000	44,000	44,000
% Utilization	84%	54%	42%	48%	57%
Sioplas/XLPE/Semicons	1,28,500	1,28,500	1,42,500	1,42,500	1,53,500
% Utilization	61%	53%	59%	65%	75%
Engineering Products	14,500	14,500	14,500	14,500	14,500
% Utilization	20%	36%	23%	13%	12%
HFFR	-	-	-	2,000	5,000
% Utilization				35%	27%
Total	2,33,000	2,37,000	2,37,000	2,39,000	2,37,500
% Utilization	60%	52%	59%	60%	70%

Note- There was shift of capacity from Antifab to Sioplas/XLPE/Semicons.

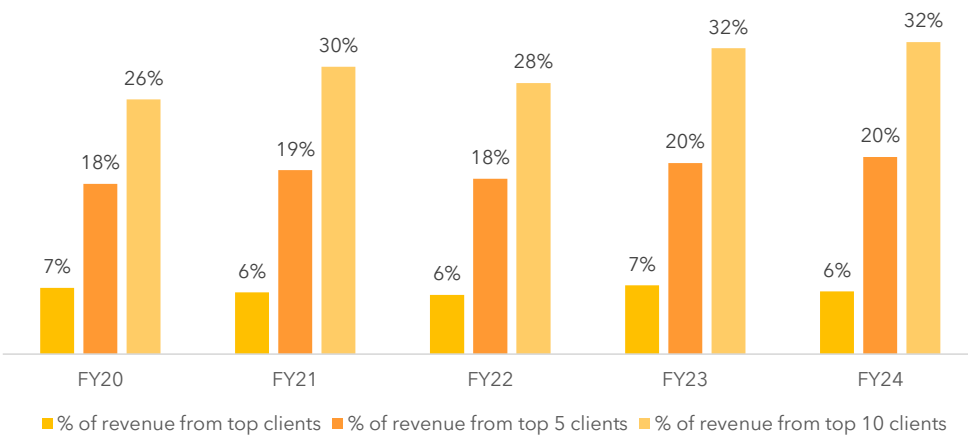
Penetrating in India and overseas markets



Geographical revenue structure (INR cr)



Wallet Share from existing clients



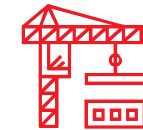
Leading supplier across sectors



Power



Oil & Gas



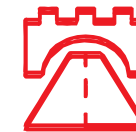
Construction



Non Metal



IT Park



Infrastructure



Renewable



Cement



Real Estate



Telecom



Railway



Agriculture



Data centers



Auto



Nuclear Energy

SWOT

Strengths



- Established market position.
- Capability of large scale operation allowing economies of scale.
- Diverse product portfolio

Weakness



- Supply chain disruption.
- Volatility in raw material prices.
- Restricted end use market

Opportunity



- Increased replacement of conventional material in various sectors.
- Surging need of Polyethylene (PE),(LDPE) (HDPE), in packaging.
- Rising demand for flame-retardant materials.

Threats



- Increasing wireless communication technology.
- Global economic slowdown concerns.
- Geo-political tensions

~15%

We Expect to Continue to Grow at 15% CAGR in Next 5 Years.

Looking ahead, we remain steadfast in our commitment to maintaining a growth and target a revenue of ~INR5,000cr over the next 5 years.



Overall Industry growth of double digit



Shift from unorganized to organized sector



Higher growth from recently launched products



New product launches



Entering new geographies



Capacity addition and enhancement



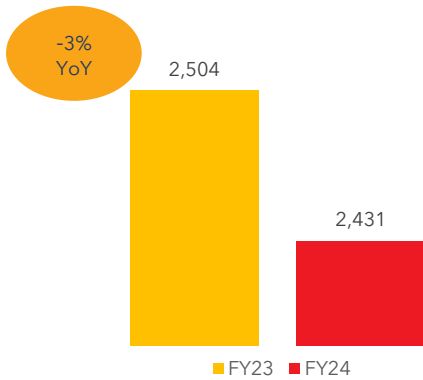
Improved Global market conditions



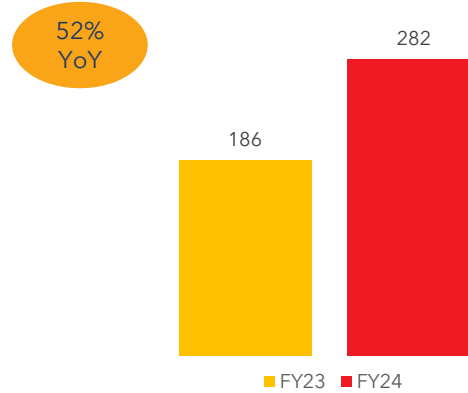
Financials
29-32

FY24 Consolidated Key Result Highlights

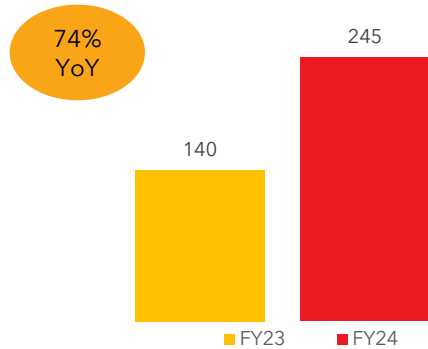
Revenue (INR Cr)



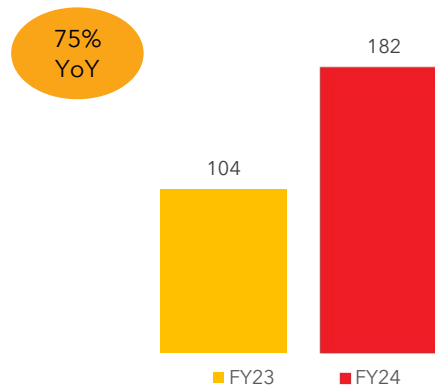
EBITDA (INR Cr)



Profit Before Tax (INR Cr)



Profit after Tax (INR Cr)



- In the fiscal, we experienced strong demand from the Cables segment, and our ongoing efforts to shift the product mix towards niche and high-voltage products led to better growth in volumes.
- Better Product mix, Cost reductions has resulted in better margins and improved bottom-line.

Note- Number are rounded of to the nearest digit.

Consolidated Q4FY24 Financial Performance



Particulars (INR in Cr)	Q4FY24	Q4FY23	YoY%	FY24	FY23	YoY%
Revenue from Operations	597	667	-10%	2,431	2,504	-3%
EBITDA	92	75	22%	282	186	52%
EBITDA Margin %	15%	11%	401bps	12%	7%	418bps
Depreciation	4	3	39%	14	12	17%
Earnings Before Interest & Tax	79	63	25%	244	148	65%
Interest	5	8	-35%	23	33	-31%
Profit Before Tax	82	64	28%	245	140	74%
Tax	21	16	28%	63	36	74%
Net Profit	62	48	27%	182	104	75%
PAT Margin (%)	10%	7%	306bps	7%	4%	331bps
Earnings Per Share Basic (INR)	5.95	5.13	16%	17.56	11.07	59%
Earnings Per Share Diluted (INR)	5.95	5.13	16%	17.56	11.07	59%

Note- Number are rounded of to the nearest digit .EBITDA includes Other Income.

Historical Income Statement

Particulars (INR in Cr)	FY 21	FY 22	FY 23	FY24
Revenue from Operations	1,534	2,227	2,504	2,431
Gross Profit	199	291	355	475
EBITDA	74	128	186	282
EBITDA Margin %	5%	6%	7%	12%
Depreciation	11	12	12	14
Earnings Before Interest & Tax	50	94	148	244
Interest	35	41	33	23
Profit Before Tax	28	76	140	245
Tax	8	21	36	63
Net Profit	21	55	104	182
PAT Margin (%)	1%	2%	4%	7%
Earnings Per Share Basic (INR)	2.25	5.82	11.07	17.56
Earnings Per Share Diluted (INR)	2.25	5.82	11.07	17.56

Note- Number are rounded of to the nearest digit. EBITDA includes Other Income

Historical Balance Sheet

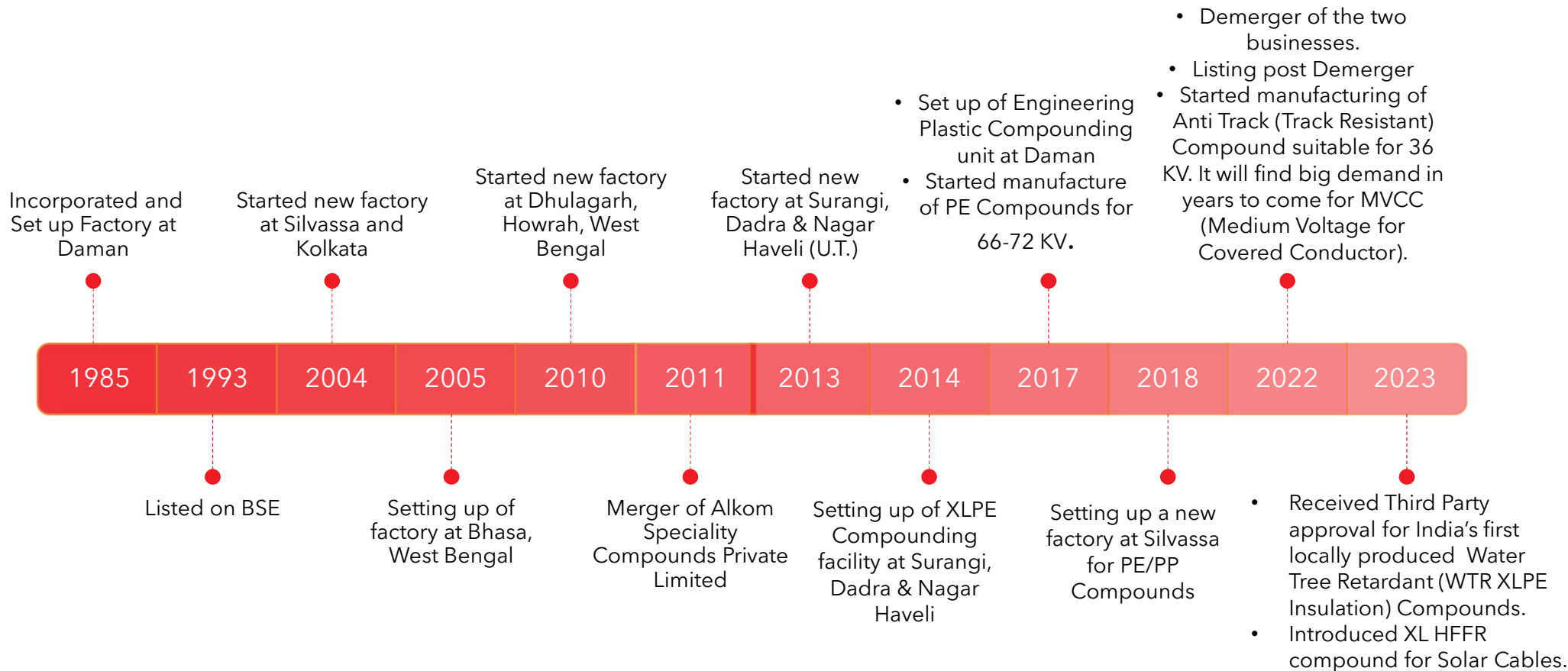
Particulars (INR in Cr)	FY 21	FY 22	FY 23	FY24	Particulars (INR in Cr)	FY 21	FY 22	FY 23	FY24
(a) Equity Share Capital	9	9	9	10	Non-Current Assets				
(b) Other Equity	328	382	485	650	Tangible Assets	201	206	225	231
Total Equity	337	392	494	660	Other Intangible Assets	0	0	0	0
Non-current Liabilities					Capital Work in Progress	0	2	1	3
Financial Liabilities					Right of use lease	0	1	1	0
(a) Borrowing	0	0.03	0	0	Other Financial Assets	0	7	15	11
(b) Lease Liability	0	0	0.22	0.06	Other Non-Current Assets	2	2	0	1
Provisions	0	3	3	4	Total Non-Current Asset	203	218	241	247
Deferred Tax Liabilities (Net)	23	24	24	23					
Total Non-Current Liabilities	23	27	28	26	Current Assets				
Current Liabilities					Inventories	228	276	218	205
Financial Liabilities					Trade Receivables	269	349	363	398
(a) Borrowings	86	129	56	66	Cash and Cash Equivalents	7	6	7	77
(b) Lease Liabilities	0	0	0	0	Other financial assets	0	2	4	5
(c) Trade Payables	0	351	291	181	Other current assets	77	78	80	63
(d) Other Financial Liabilities	0	11	29	38	Total Current Assets	581	711	671	748
Provisions	0	2	2	4					
Other current liabilities	338	9	4	5					
Current Tax Liabilities(net)	0	7	8	15					
Total Current Liabilities	424	510	390	309					
Total Equity and Liabilities	784	929	912	995	Total Assets	784	929	912	995

Note- Number are rounded of to the nearest digit.



Annexures
33-42

Major Milestones Achieved



Experienced Board of Directors



Mr. Narrindra Suranna
Chairman & Managing Director

- Associated with Company since inception. Wide experience in Plastic Industry, Company has reached its present height under his leadership.
- B.Com (Hons.) and L.L.B from Calcutta University.



Mr. Ddev Surana
Whole Time Director and CEO

- Dynamic business leader and key driving force of Company.
- B.Com (Hons.) from St. Xaviers, Kolkata, MSc from University of Warwick, UK and MBA from Babson University, USA.



Mr. Rajesh Kothari
Whole-Time-Director

- 25+ years of experience in the areas of marketing, after sale service and market research. He started his career at Kanoria Chemicals & Industries and been associated with the group since 1997.
- B.Com from Rajasthan University, Ajmer.



Ms. Mamta Binani
Independent Director

- 21+ years of experience in corporate consultation & advisory, on Board of several companies like GPT Infrastructure Ltd, Century Plyboards (India) Ltd, Anmol Biscuits Ltd.
- B.Com, Law graduate and Fellow member of the ICSI.



Mr. Samir Kumar Datta
Independent Director

- Served on multiple industries during his service tenure of 4 decades and started his practice as a Cost accountant since 2007.
- Science graduate from Calcutta University and Fellow Cost Accountant.



Ms. Ramya Hariharan
Independent Director

- In past, worked with Amarchand Mangaldas and Argus Partners. Founder of Citadel Law Chambers. On the board of various listed and unlisted companies.
- Qualified Company Secretary and LLB from Calcutta University.

Leadership Team



Mr Arihant Bothra
Chief Financial Officer

- He is an Associate member of Institute of Chartered Accountants of India and an IIM Calcutta Alumni. Vast working experience for more than a decade in the areas of Finance, Accounting, Insurance, Information System and Project Financing.
- Graduated from Calcutta University in 2010



Ms. Tanvi Goenka
Company Secretary

- She is a graduate in commerce and has received her membership of Institute of Company Secretaries of India in 2012. She holds working experience of over 12 years on mergers and acquisitions compliances involving listed as well as unlisted companies. She also has experience in all forms of restructuring including by way of scheme of arrangement

Accreditations and Industry Recognition



ISO Certificates



KEMA Approval



CPRI Approval



CACT Approval



VDE Approval



XLPE ROHS TESTS



POWERGRID Approval



UL Approval



PVC ROHS REACH TESTS



ERDA

Benefits of strong Research and Development Infrastructure



Maintenance of leading position in the market

1.

Developments of various grades of PVC & XLPE compounds to meet changing market needs

8.

Efficiency and yield improvement, loss reduction and modernization

2.

Increased output and labor saving

7.

Increased market share

3.

Import substitution

6.

Better market penetration

4.

Expand in new business areas

5.

Strong focus over development of compounds that have wider industrial applications, particularly in cable, piping, packaging and footwear industries

Awards & Recognitions



Sustainability at the Core



Distributed balanced nutrition food to School Students at Surangi Govt. High School



Undertaken the CSR Initiative of providing Nutrition Supplement to TB patients in Surangi Village.



Planted over 500 trees at manufacturing units and schools



Eye check ups of 600 persons and distributed 300 eye drops and 100 specs



Installed Solar Panels at Surangi Unit, reducing 80 MT carbon emissions per month

Diversified Customers - Domestic



Top clientele constitutes of prominent domestic and global companies

Well established relationships with renowned clientele provide stability to revenues and drive business going forward



Diversified Customers - Exports



Electro Cable Egypt





Ddev Plastiks Industries Limited

For further information, please get in touch with

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