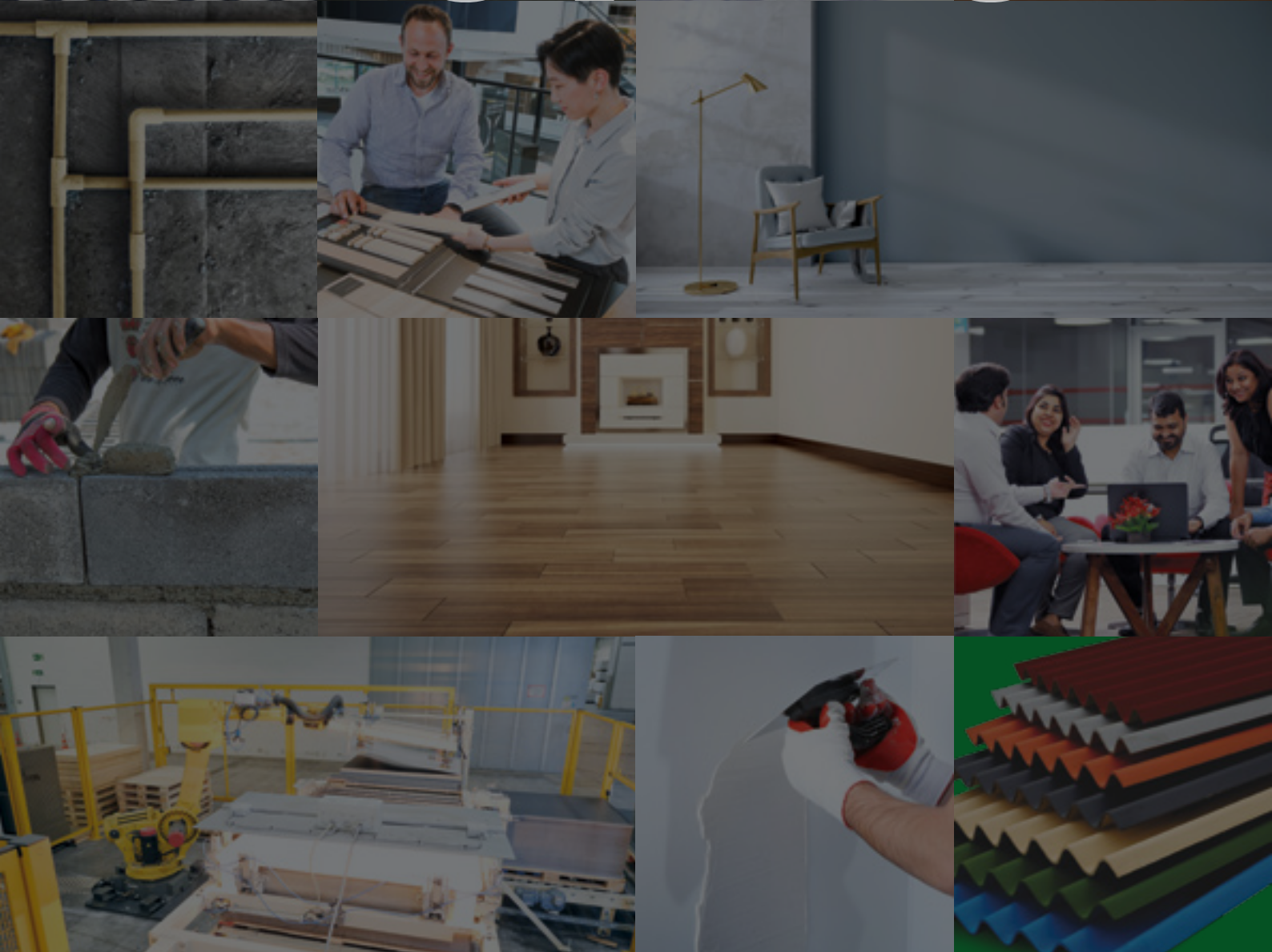


# POWERING GROWTH WITH **DIVERSITY** AND INNOVATION



Pivoted on the cornerstones of Diversity & Innovation – HIL remains committed to power growth with cutting-edge solutions that reaffirm its position as a global brand. As an organization driven by the zeal to excel at home and abroad, HIL believes in setting aspirational targets that validate its market leadership, relying on its diverse workforce to enhance productivity and increase profitability.

With a constant focus on identifying better prospects, HIL remains perfectly poised to exploit opportunities to fuel sustainable growth – keeping diversity and innovation at its core.



A creative rendition depicts HIL's continuous focus on innovative and cutting-edge solutions, showcasing their zeal to drive sustained growth and productivity through concerted efforts. The cover design further illustrates HIL's philosophy to drive growth with innovation and diversity, to formulate plans to foster business success.

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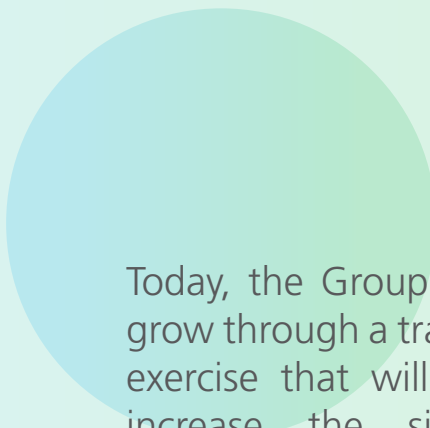
# Enduring Value - CK Birla Group

The CK Birla Group is a growing US \$2.4 billion conglomerate that has a history of enduring relationships with renowned global companies. The Group's operations are spread across six industry sectors: Automotive, Technology, Home and Building, Infrastructure, Healthcare and Education. Since its inception in 1862 by Seth Shiv Narain Birla, the group has maintained a consistent track record of creating value for all its stakeholders including customers, partners, people and communities.

With over

**30,000  
employees,**

various manufacturing facilities, service delivery locations and numerous patents and awards, the Group's businesses are present across five continents with a customer base that includes some of the world's best-known companies and has partnerships with several global leaders.



Today, the Group is poised to grow through a transformation exercise that will significantly increase the size of the business, with technology and talent driving the expansion. The Group's vision is to create value in tune with the rapidly changing needs of customers, partners and communities in the twenty-first century.

# HIL - Sustaining Excellence with Innovation

One of the leading manufacturers and sellers of building materials and solution providers, HIL provides innovative, superior quality and sustainable products to its customers. The addition of Parador flooring to HIL's portfolio has further amplified our offerings to end consumers.

## Vision

To be a leading, global, innovative and eco-friendly building and infrastructure solutions company and create sustainable value for our stakeholders.

## Mission

- To deliver** → a diversified portfolio of eco-friendly products and solutions fuelled by innovation
- To build** → a strong corporate brand present across all continents
- To ensure** → end-to-end digitization of processes for business excellence
- To be** → a diversified workplace and a preferred employer

while continuing to meet our highest standards of quality, corporate social responsibility, safety, health and environment.

## Values

### Innovation



Embed innovation in organizational processes across all levels

### Respect



Care and respect for all stakeholders

### Accountability



Complete ownership and responsibility of outcomes

### Teamwork



Together we build the success of ONE HIL

### Integrity



Being ethical and honest in our behaviour

### Excellence



Strive to achieve highest standards of performance

## Our Renowned Brands Portfolio

### Roofing Solutions

**CHARMINAR**  
Most Trusted Roofing Solution



### Building Solutions

Wet and Dry Walling Solutions

**BIRLA AEROCON**  
BUILDING SOLUTIONS

### Polymer Solutions – Pipes

**BIRLA | HIL**  
PIPES

### Polymer Solutions – Putty

**BIRLA | HIL**  
PUTTY

### Leading European Flooring Solutions

**PARADOR**



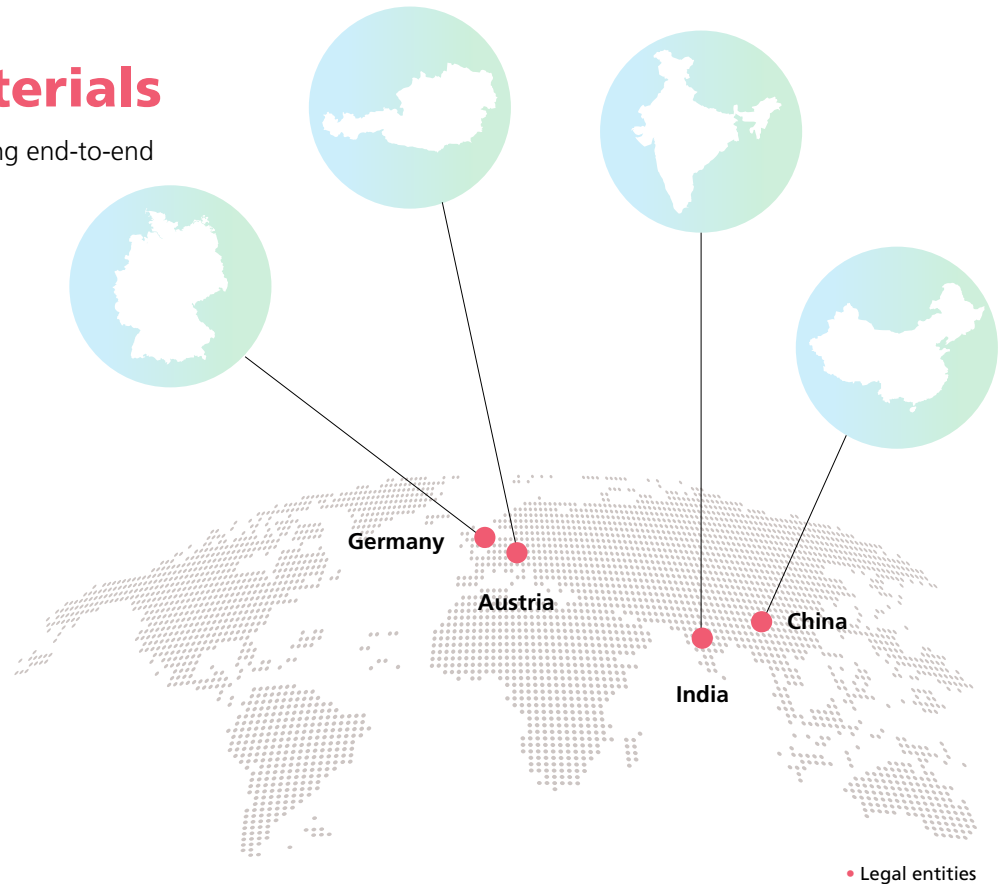


## Key Facts About Us

We are amongst the leading  
**Building materials company** providing end-to-end cutting-edge solutions

# #1

Ranked in India and Germany in specific product categories



**5500+ Employees** (across India and Overseas) form an integral part of our family

Our wide distribution network of  
**6000+ dealers** ensures last mile connect of products and solutions

We have been certified  
**Great Place to work** for a second consecutive year.

Our **R&D teams in India and Germany** help to deliver new products and solutions aligned to evolving market requirements

We are guided by our **experienced** Board of Directors and an extremely capable leadership team

Successfully create value for all  
**our stakeholders**

Presence in **80+ countries** globally

**23 state-of-the-art manufacturing units** enable us to produce high quality and innovative products

# Managing Covid-19

The outbreak of coronavirus continues to wreak havoc around the world, and it has affected human lives in unfathomable ways. To prevent its spread, a countrywide lockdown was imposed in India in mid March 2020, resulting in a complete halt of activities across sectors. Innumerable challenges on movement of goods in metro cities with uncertainties in the revival of real estate sector and our other focus areas continues to loom. The challenges owing to migration of workers and non-availability of workmen continues to daunt as we enter the new normal.

## Our Focus Areas

In these unprecedented circumstances HIL is rethinking and re-evaluating the new normal

- Formation of 10 work streams with clear charters towards a common goal of protecting profitability and people's health
- Challenging each cost line item – ZERO based approach
- Converting a crisis into an opportunity to create a lean and efficient business model
- Enhancing a customer centric business model by effectively leveraging digital media
- Continuously add value to society in the time of distress - Distribution of sanitizers made inhouse as per WHO guidelines to our wider community.
- Maximizing operational efficiencies
- A systematic day zero plan helped us positively enhance business operations.
- Reviewing external risks (associated with the business and formulation of mitigation plans)
- Working with Parador to explore e-business, government supports and banking connects

## Strategy to Convert Crisis to Opportunity

We are undertaking following steps to convert the global pandemic into an opportunity for enhancing our efficiency

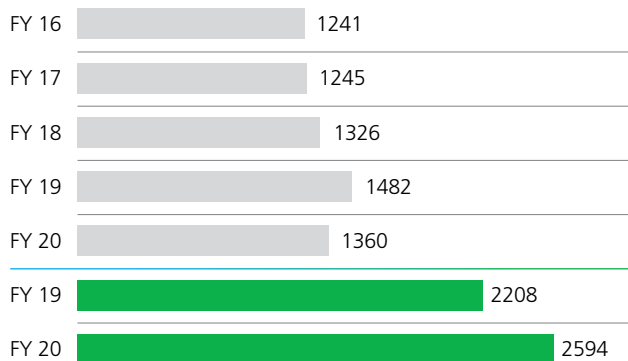
- Prudent cash-flow management (cross border) to strengthen our sustainability during this unprecedented time
- Modified credit terms in discussion with customers and suppliers to optimize working capital
- Improving connect and cohesion through digital platforms to make working from home more impactful
- Enhancing digital connectivity through lead generation and lead management portal
- Grass root district planning and mapping of secondary and tertiary showing promising results in these testing times
- Utilize digital as an efficient mode to improve transparency and effectiveness while ensuring cost efficiencies.
- In Parador, we modified our sales approach through DIY and E-business where we safely provide deliveries to customers and the customers took responsibility of the installations. This worked well for Parador and helped maintain its momentum.



# Sustaining Momentum- Our Financial Metrics

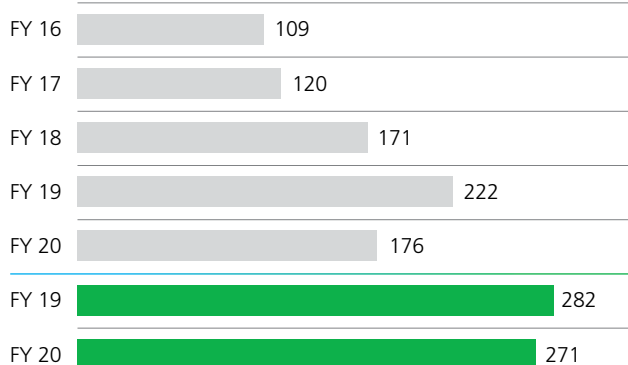
## Revenue from operations

(₹ in Crores)



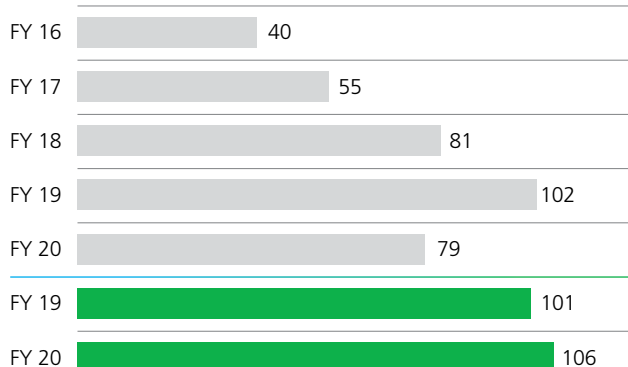
## EBITDA

(₹ in Crores)



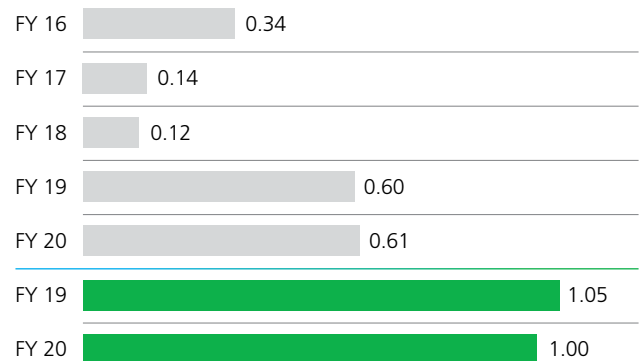
## PAT

(₹ in Crores)



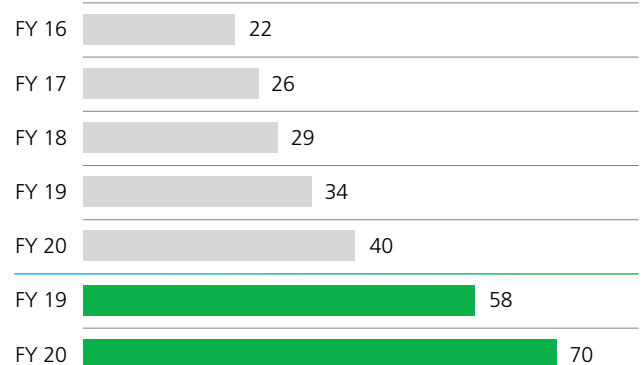
## Debt equity ratio

(in times)



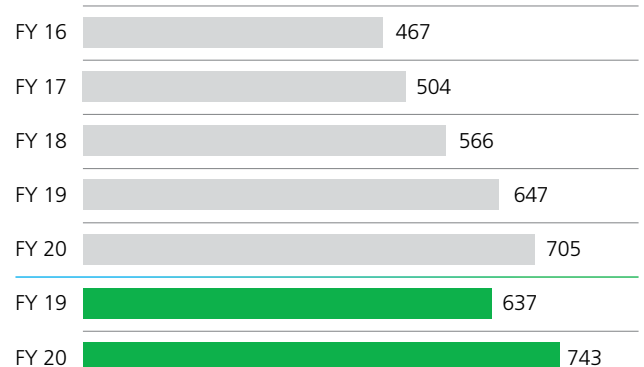
## Share of Non-Asbestos

(% to Total Revenue)



## Net Worth

(₹ in Crores)



# Brands with a Difference

HIL has always remained at the forefront with innovative and improved products that meet customer needs. Our ability to offer a diverse portfolio of products ensures sustained leadership for all our brands. With our diverse brand portfolio including Charminar, Charminar Fortune, Birla Aerocon, Birla HIL Pipes and Putty and Parador, HIL remains poised to create a differentiated identity. We are the only company providing end-to-end building material solutions, ranging from roofing and walling to plumbing and flooring.



## Roofing Solutions

We offer an exhaustive range of innovative and eco-friendly roofing solutions, ranging from Fiber Cement Sheets to Colour Coated Sheets and Next Gen Eco-friendly sheets. Our flagship Charminar brand remains the most trusted and renowned brand in the roofing solution space.

### Brands



India's largest manufacturer of fiber cement roofing solutions



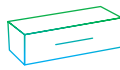
The Next Gen eco-friendly and non-asbestos roofing solution

### Products

- Fiber Cement Sheets
- Next Gen non-asbestos corrugated roofing sheets
- Coloured steel sheets
- Charminar Coloured Cement Roofing Sheets

## 1078000

Cumulative capacity of Fiber Cement Sheets per annum (in MT)



## Building Solutions

With a wide range of effective and innovative building solutions for modern buildings, HIL offers a one-stop solution to meet varied requirements. This segment is classified into two divisions i.e. Wet Walling and Dry Walling Solutions.

### Brands



India's leading Building Solutions brand comprising of dry and wet walling solutions

### Products

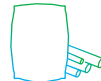
- Block Jointing Mortar
- Cement Sandwich Panels
- Fly Ash (AAC) Blocks
- Fiber Cement Boards
- Designer Boards
- Tile Adhesive
- Ready Mix Plaster

## 873000

Capacity of Fly Ash (AAC) Blocks per annum (in CUM)

## 84000

Cumulative capacity of Panels per annum (in MT)



## Polymer Solutions

Our polymer solutions consist of Pipes & Fittings and Wall Putty. The plumbing segment offers an extensive range of pipes and fittings ideal for households, industrial and commercial applications. We also manufacture superior quality putty for walls.

### Brands



Birla HIL is a major player in the Polymer segment for Pipes and Wall Putty.

### Products

- CPVC & UPVC Pipes & Fittings
- SWR Pipes and Fittings
- Column Pipes
- Pressure Pipes
- Wall Putty

## 29449

Cumulative Capacity of Pipes & Fittings per annum (in MT)

## 165000

Cumulative capacity of wall putty per annum (in MT)



## Flooring Solutions

The acquisition of Parador has strengthened our flooring solutions segment. With our innovative range of products, HIL offers premium quality wooden, laminate and resilient floor covering to provide comprehensive flooring solutions.

### Brands



A leading international brand for wooden flooring

### Products

- Engineered Wood Flooring
- Laminate Flooring
- Resilient Floor Covering / Vinyl Flooring
- Skirting & Accessories

## 15

Cumulative capacity per annum (in M SQM)



# Brand Power

Over the last two years we have leveraged our association with Chennai Super Kings and achieved the most out of the partnership. This year, we shifted our focus by engaging with last mile channel partners, leveraging BTL advertising and digital space for all our brands.

Our Birla HIL Pipes and fittings and Birla HIL Putty brands leveraged the following BTL advertising:

- Branding through Long Vehicle and Delivery Vehicle to increase our brand visibility across the country.
- Changed the colour palate of our signage to bi-colour with emphasis on larger

logos to increase mass engagement.

- Leveraged social media platform to connect with our customers, showcase our products and interact with them through schemes and contests.

Our Birla Aerocon brand leveraged its connections with channel and end customers

through participation in various events and exhibitions, such as Alleppey Boat Race, CREDAI Home Expo and BNI Trends 2020 Exhibition.

Parador conducted trainings and workshops for their dealers at Delhi, Mumbai and Bangalore and the brand participated in renowned exhibitions such as Elle Décor, D code, India Design 2020 and LivSpace which benefitted

the brand in terms of visibility, exposure to wide audience and familiarity with its range of offerings. Parador has also utilized Digital media and associated with premium magazines such as Elle Décor, Vistara In-flight magazine and Surface Reporter for its brand building activities.



▲ Parador represented at India Design 2020

# Leading with Innovation

At HIL, innovation is underpinned in our value creation model, constantly focusing on meeting customer expectations and needs. Creating value for customers is a prerequisite at HIL. As a result, innovation goes far beyond our products and includes various services and processes that enhance productivity and efficiency. Our ability to offer a diverse range of innovative products helps us to create a differentiating experience, enabling us to sustain and expand our market leadership while maintaining a high level of performance and operational excellence.

## Innovation at Parador

### Parador StudioConcept

The new Parador StudioConcept allows customers to discover a variety of products in an inspiring atmosphere. It gives an opportunity to address the requirements of a wider

customer base, offering a range of modules which can be easily adapted according to individual requirements of space, flexibility and productivity.

The Parador StudioConcept is also equipped with a digital info point - an interactive new-age technology. It provides a simple, intuitive tool that helps the buyer as well as the seller during the purchase process by providing relevant information

about the product, including its price. It also enables the customer to compare products. All samples at the point of sale (POS) are equipped with QR codes to provide quick support, informing about product or process updates.



▲ Parador Corporate Office