

PI Industries Ltd.

Investor Presentation Q4 FY25 Result



CDR India

Siddharth Rangnekar
siddharth@cdr-india.com

Nishid Solanki

nishid@cdr-india.com
Tel: +91 22 6645 1221 /1209
Fax: +91 22 6645 1213

PI Industries Limited

Rajnish Sarna
r.sarna@piind.com

Sanjay Agarwal

sanjay.agarwal@piind.com
Tel: +91 22 6266 5600
Fax: +91 22 6266 5765

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A G E N D A

- Consolidated Financial Performance
- Key Updates
- Business Model and Strategy
- ESG Credentials
- Rewards & Recognition

Resilient performance amid global industry headwinds...

New growth drivers taking shape



Figures in Rs. Million

Revenue

EBITDA

PBT

PAT

***Q4FY25**

17,871 ▲ 3%

4,569 ▲ 3%

4,322 ▲ 5%

3,305 ▼ 11%

***FY25**

79,778 ▲ 4%

21,833 ▲ 8%

21,420 ▲ 13%

16,602 ▼ 1%

Commercialised
6 new products in
Exports and
7 in Domestic
Agri Brands

New products in
Agchem Exports
growing ~31% Y-o-Y

Domestic Biologicals
revenue grew by
~20% Y-o-Y

DIO
improved to 45 days
from 62 days Y-o-Y

Cash flow from
operating activities in
FY25 is
Rs. 14,130 million

*Consolidated Financials

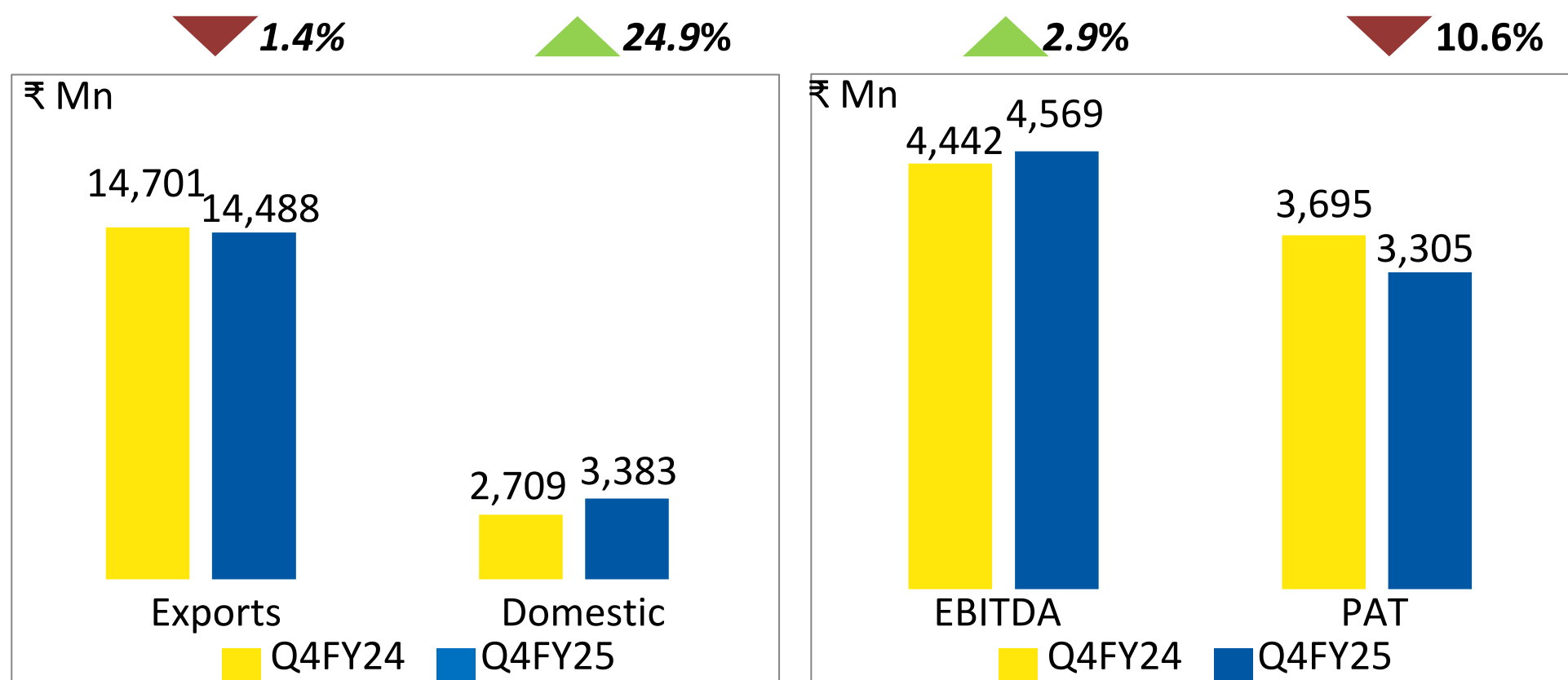
Standalone FY25 financials Revenue ▲6%, EBITDA ▲17%, PAT ▲ 8%

Surge in domestic brands led the growth in Q4...

..offsetting modest exports



Fig in Rs. Million	Q4FY24	Q4FY25	% YOY
Revenue	17,410	17,871	3%
Gross Margin	54%	55%	121 bps
Overheads	4,958	5,285	7%
EBITDA	4,442	4,569	3%
EBITDA as % of Revenue	26%	26%	5 bps
Net Profit	3,695	3,305	(11)%



- Revenue Y-o-Y growth ~3% (3-year Q4 CAGR 9%).
- ~5% decline in Agchem Exports (Volume +~7%) and New products¹ growth ~23% Y-o-Y.
 - Volume growth offset by price erosion due to input cost softening;
 - 15+ molecules commercialised over the last 3-years.
- Domestic branded revenue grew by ~21% Y-o-Y (Volume up ~24%).
 - Robust volume growth supported by a strong Rabi season, marked by increased acreage in wheat, rice, and pulses.
- Biologicals products driving growth and revenue increased by ~10% Y-o-Y.
 - Led by launch of new products;
 - Increased adoption of sustainable crop solutions at farmer-level.
- Pharma² contributed ~6% of total Exports revenue. Q-o-Q growth of 33% (sequential).
- ETR increased from 10.2% to 23.5%.
- The Board has approved **final dividend for FY24-25 of Rs 10 per share** (total dividend for FY24-25 of Rs 16 per share including interim dividend).

¹ New products are newly commercialised products over last 3-years

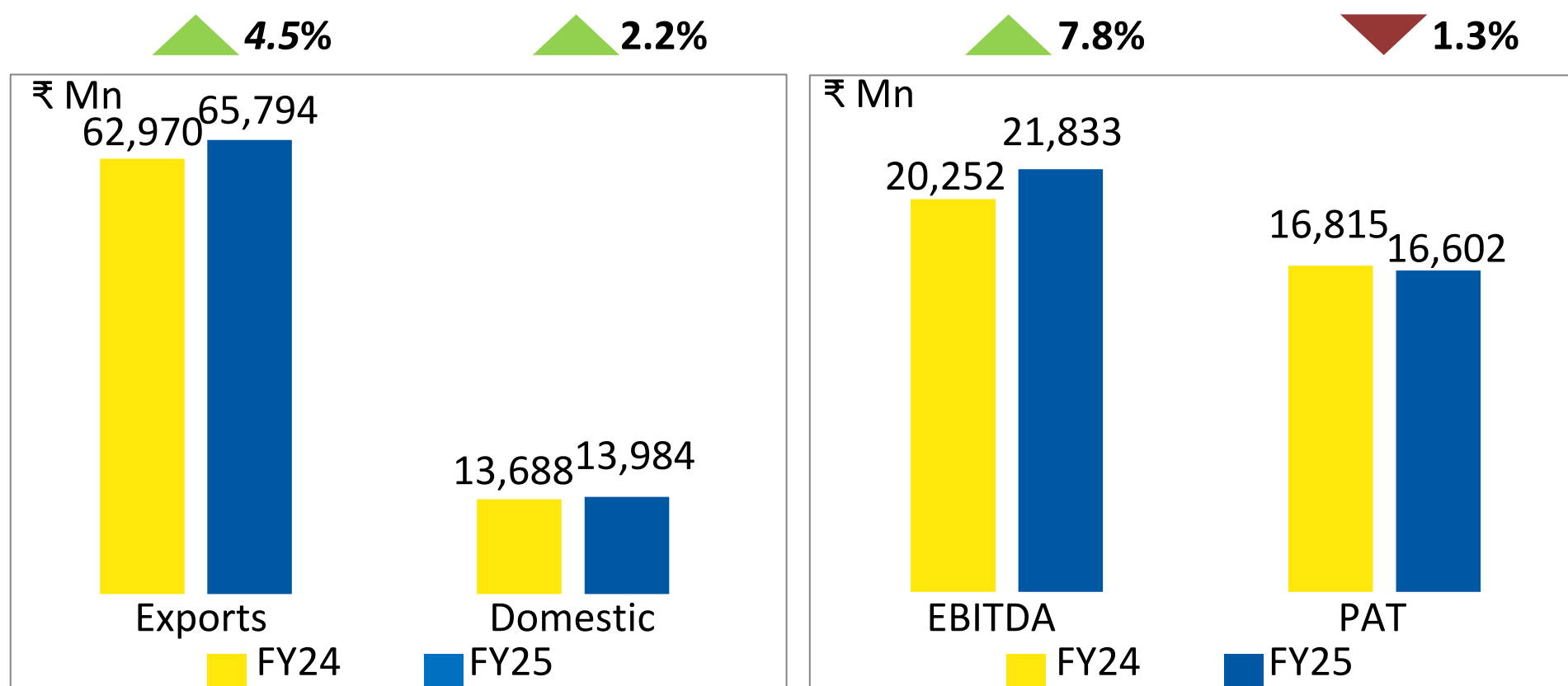
² Pharma: PI Health Sciences Ltd. ("PIHSL") Consolidated including overseas subsidiaries

New launches and biologicals featuring as key growth drivers of FY25



Fig in Rs. Million	FY24	FY25	% YOY
Revenue	76,658	79,778	4%
Gross Margin	50%	53%	279 bps
Overheads	18,135	20,277	12%
EBITDA	20,252	21,833	8%
EBITDA as % of Revenue	26%	27%	95 bps
Net Profit	16,815	16,602	(1)%

- Overall 4% Y-o-Y revenue growth (3-year FY25 CAGR 15%).
- ~5% growth in Agchem Exports over a high base and New products growth ~31% Y-o-Y.
- Domestic branded revenue grew by ~6% (Volume up ~9%).
 - Delayed and erratic rainfall during the Kharif season along with pricing pressures from generics moderated the overall growth.
- Biologicals products grew by ~20% Y-o-Y.
 - Continued investment in R&D, partnerships and expansion of biological portfolio helped in the growth.
- Commercialisation of 6 new products in Exports and 7 in Agri Brands.
- Gross Margin improved to 53% due to better product mix.
- Overheads increase attributable to promotion expenses for the launch of the new products and adding resources to build the Pharma² business and PHC integration.
- Increase in ETR from 11.2% to 22.5%.



² Pharma: PI Health Sciences Ltd. ("PIHSL") Consolidated including overseas subsidiaries

Strong balance sheet & stable cashflows supporting growth investment... ..steady surplus ensures future flexibility



Fig in Rs. Million	Mar-24	Mar-25
Shareholders Fund	87,310	1,01,570
Non Current Liabilities	3,224	3,920
Long term borrowings	617	780
Other long term liabilities	2,607	3,140
Current liabilities	17,106	17,277
Short term borrowings	662	337
Trade payables	11,484	12,102
Other current liabilities	4,960	4,838
Total	1,07,640	1,22,767

Non Current Asset	40,854	53,245
Net Fixed Asset	34,453	42,050
Goodwill	3,611	5,539
Non current investments	903	2,716
Other assets	1,887	2,940
Current Assets	66,786	69,522
Inventories	13,012	9,839
Trade receivables	9,299	14,058
Contract assets	1,612	4,268
Cash, Bank & Investments	39,499	37,594
Other assets	3,364	3,763
Total	1,07,640	1,22,767

Key Ratios (%) Annualised

Net Sales to Trade Working Capital	6.16	4.97
Debt/ Equity Ratio	0.01	0.01
Net Sales to Net Fixed Assets	2.23	1.90
ROCE ³	35.1%	28.9%

³ ROCE computed excluding Cash, Bank & Investments

⁴ Trade working capital includes Contract assets

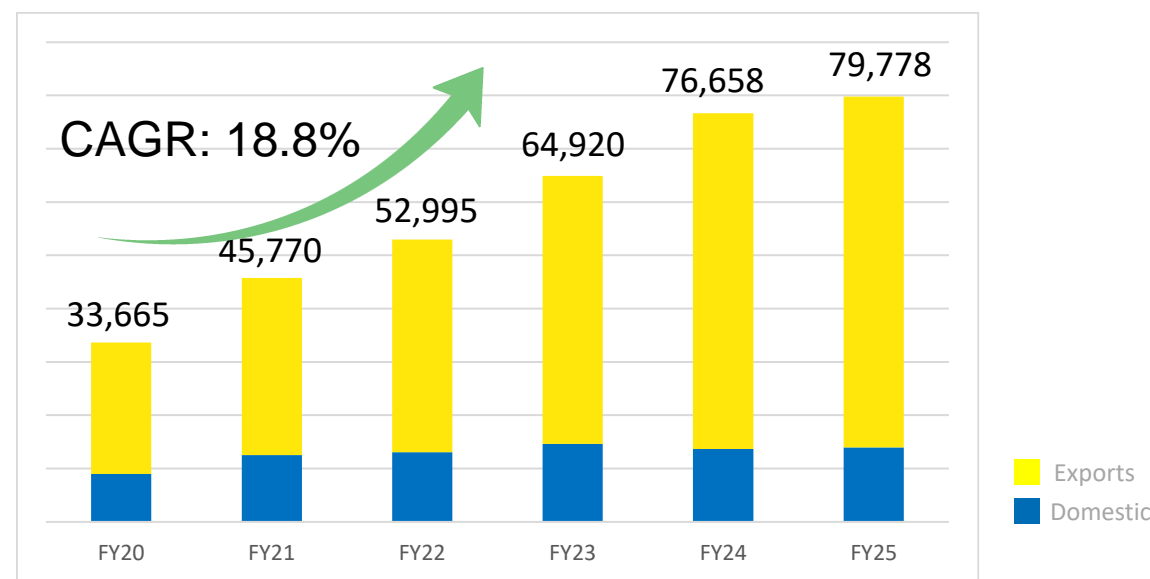
Highlights of FY25

- **Increase in Net worth** by Rs. 14,260 million **to Rs. 101,570 million.**
- **Total capex for FY25 is Rs. 9,280 million** including ~Rs 1,275 million capex in PIHS (FY24 Rs. 5,851 million).
- **Trade working capital⁴** in terms of Days of Sales **increased to 73 days** vs. 54 days as on 31-Mar-24. This is due to higher growth in Agri branded revenue and phasing of Agchem Exports in Q4, temporarily impacting the receivables.
- **Inventory levels** of Rs. 9,839 million, **reduced in terms of Days of Sales to approx. 45 days** vs. 62 days as on 31-Mar-24.
- Cash flow from operating activities is Rs. 14,130 million.
- **Surplus cash net of debt is Rs. 40,926 million** (vs. Rs. 38,825 million as on 31-March-24).

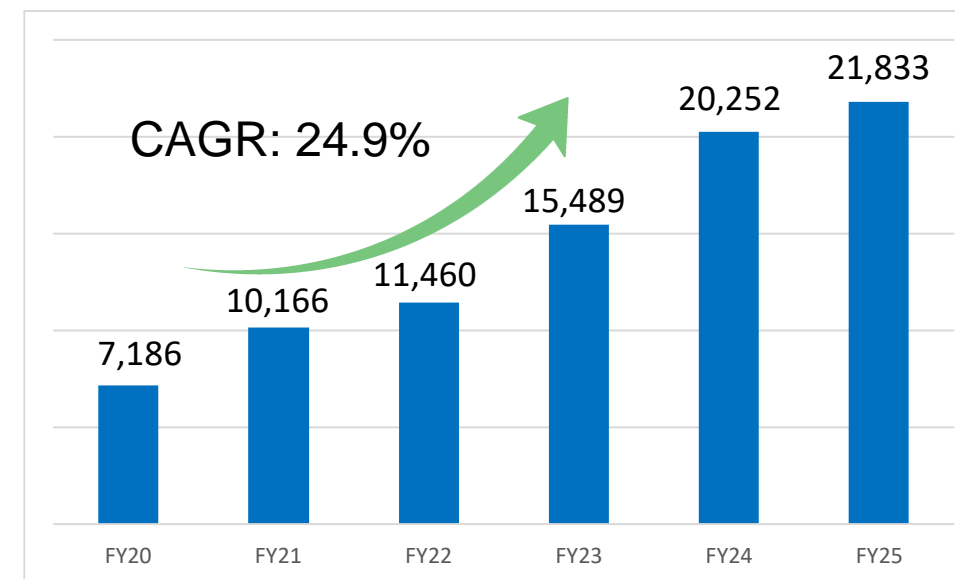
Decades of outperformance, profitable growth and value creation across cycles continues...

Figures in Rs Million except EPS

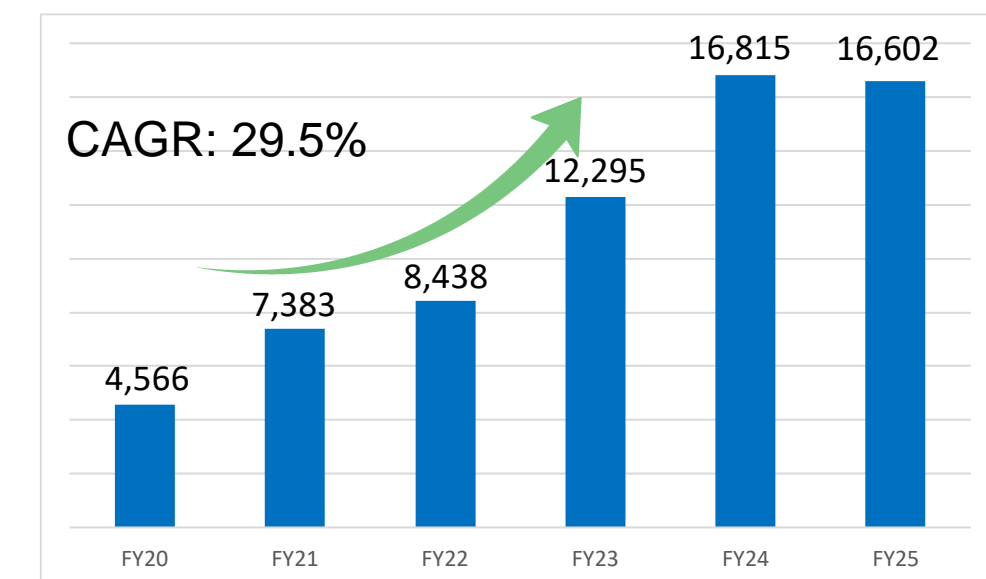
Revenue



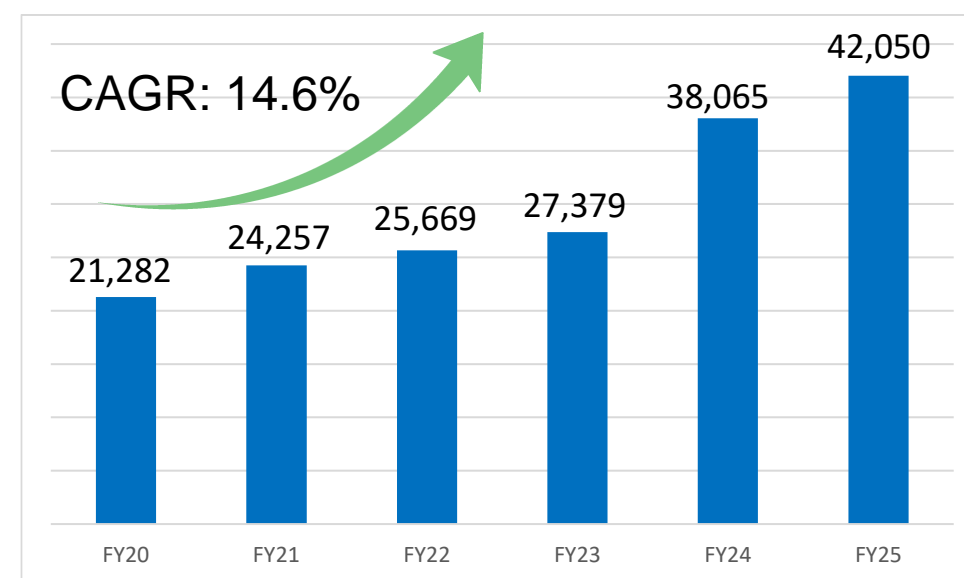
EBITDA



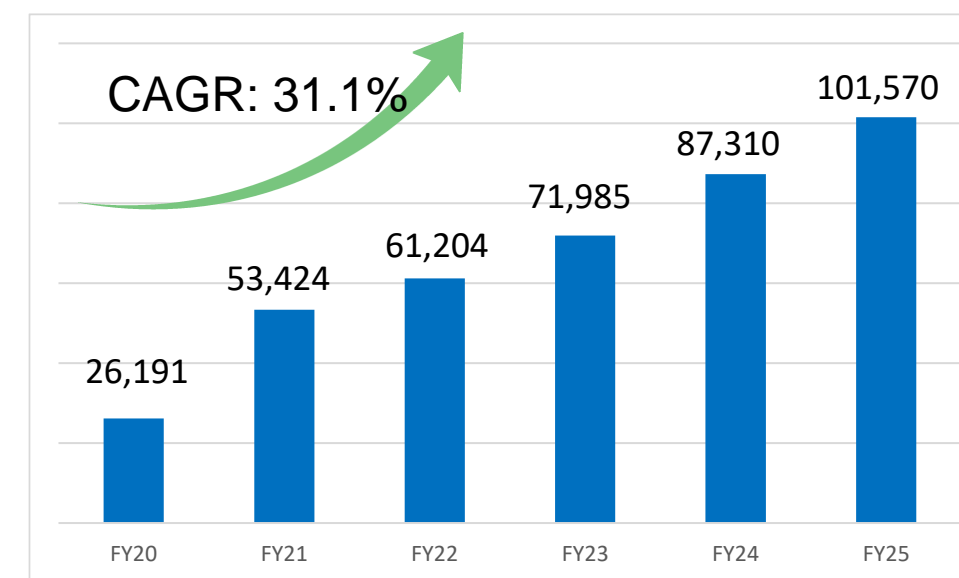
PAT



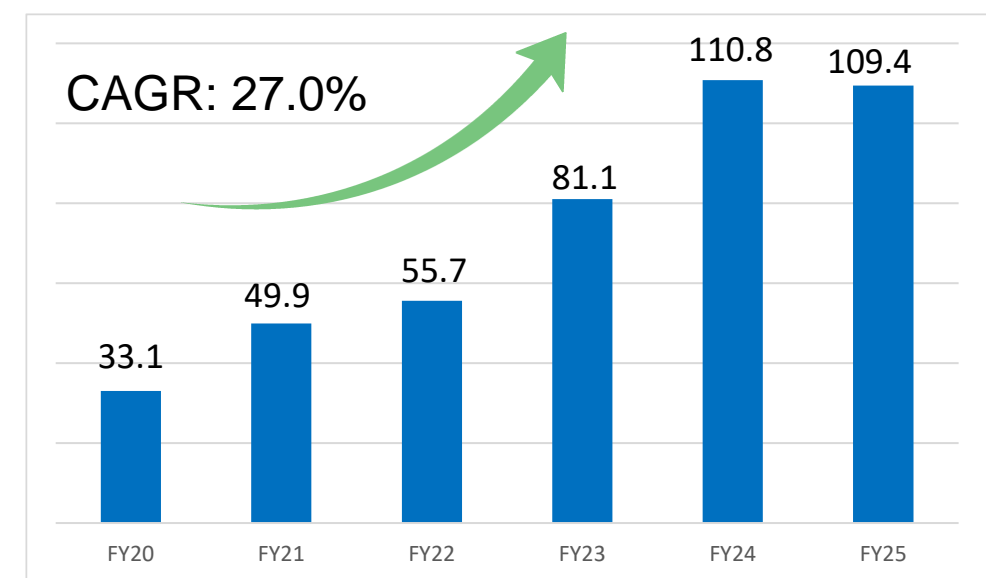
Fixed Assets



Net Worth



EPS



PI is transforming from Agchem Leader to Life Sciences Powerhouse...

Addressing 10X BIGGER Opportunities

- 1 R&D
- 2 Agchem Exports
- 3 Agchem Brands
- 4 Biologicals
- 5 Pharma

Past

*Pioneered bringing Innovative
Agchem Products to Indian
Farmers & achieved Scale*

- Built world-class research & process development capability
- Best Financial Metrics in the Global Ag Industry
- Impeccable Reputation built on Trust & Integrity
- Constant Passion & Investments in Science & Technology to differentiate

Present

*A fully integrated Innovated AgScience
Company from Discovery to Distribution
with deep-rooted partnerships*

- Scaling up CSM play in Ag and diversifying into new product areas
- Leveraging Tech Platforms & Capabilities to build differentiated new business models
- Strong relationships in the Chemical sector, deepening & widening
- A Global benchmark in the ESG space
- Industry-leading Revenue CAGR of ~19% and EBIDTA CAGR ~25% over last 5 years, with ROCE >30%

Future

*Global Technology platform Leader in
Biologicals;
Differentiated CRDMO player in Pharma*

- Consolidate Leadership position in global CSM and Agri distribution in India
- Bring new NCEs from India to the World with Global Partnerships
- Diversified Specialty Chemicals portfolio to participate in newer verticals
- Chasing a much larger 10X market opportunity across diversified Life Sciences verticals
- Institutionalize High Quality Research & Development



..driven by a unique business model, excellent delivery and trusted relationships

World-class R&D set-up delivering innovative and disruptive solutions

State-of-the-art
R&D Labs
at **4 locations**

NABL ISO17025 and GLP certified
New ICP-OES
Addition of **UPLC-CAD**
(Charged Aerosol Detector)

700+ Scientists
200+ Doctorates

R&D

70+ projects at different
development stages

210+ Patents
till date with 44
Patents in FY25

In-house library
with a vast array of
knowledge resources



1st Indian company to receive approval from International Organization for Standardization (ISO) for groundbreaking insecticide named "PIOXANILIPROLE"

Phase 1-2	Phase 3
Additional leads in the pipeline	"PIOXANILIPROLE"

AgChem Labs



Pharma Labs



Robust product portfolio and pipeline providing long term growth visibility for CSM Exports

..non-AgChem projects gaining traction



15+ molecules have been commercialized over the last 3-years



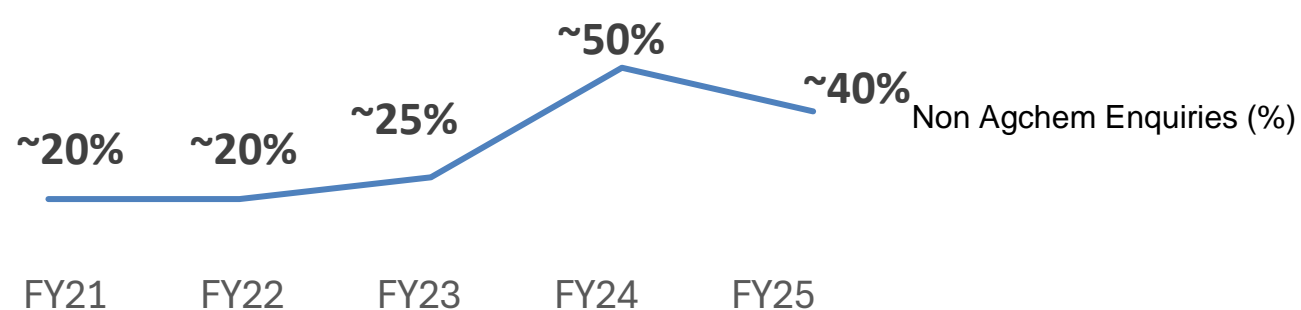
90+ molecules are currently in active pipeline with **> 45%** in advanced stages of development



Increased Contribution of Revenue from New Products **Freshness Index# ~15% (FY25)**



Ramp-up in Pipeline from **Diversified Segments**. **Non-AgChem's** share in new enquiries has increased from **~20% (FY21) to ~40% (FY25)**



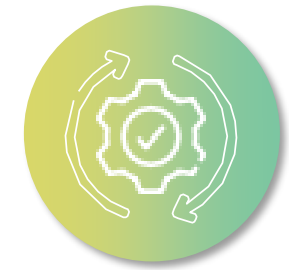
Agchem continues to Grow; Diversifying Portfolio with new segments like Electronic & Specialty Chemicals..



Agchem CSM, a global leader, backed by strong technological strengths



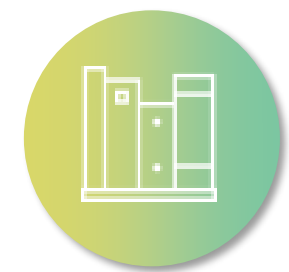
Technology pioneer with technological and IP based interventions in global contract manufacturing



15 Fully automated Multipurpose Plants (MPPs) with Distributed Control System (DCS) spread across 5 locations



Product portfolio consists of early stage molecules with continued thrust to adapt sustainable practices



Extensive experience in handling Hazardous Chemistry with over 130 unit processes



Amongst Top 25 global chemical companies part of the S&P Global Sustainability Yearbook

- ✓ ISO-certifications
- ✓ Golden Batch Tool
- ✓ 2 dedicated scale-up facilities at Udaipur and Panoli
- ✓ Completely online documentation for input traceability and digital batch logs
- ✓ World-class Environment Management Facilities
- ✓ Extensive in-house waste treatment facility



Domestic Agri Brands to continue growth momentum through launching new products and focusing on Crop Solution approach

Over 6 Decades creating Industry-Leading Brands

Pan-India Distribution Network

- 15,000+ distributors
- 100,000+ retail points

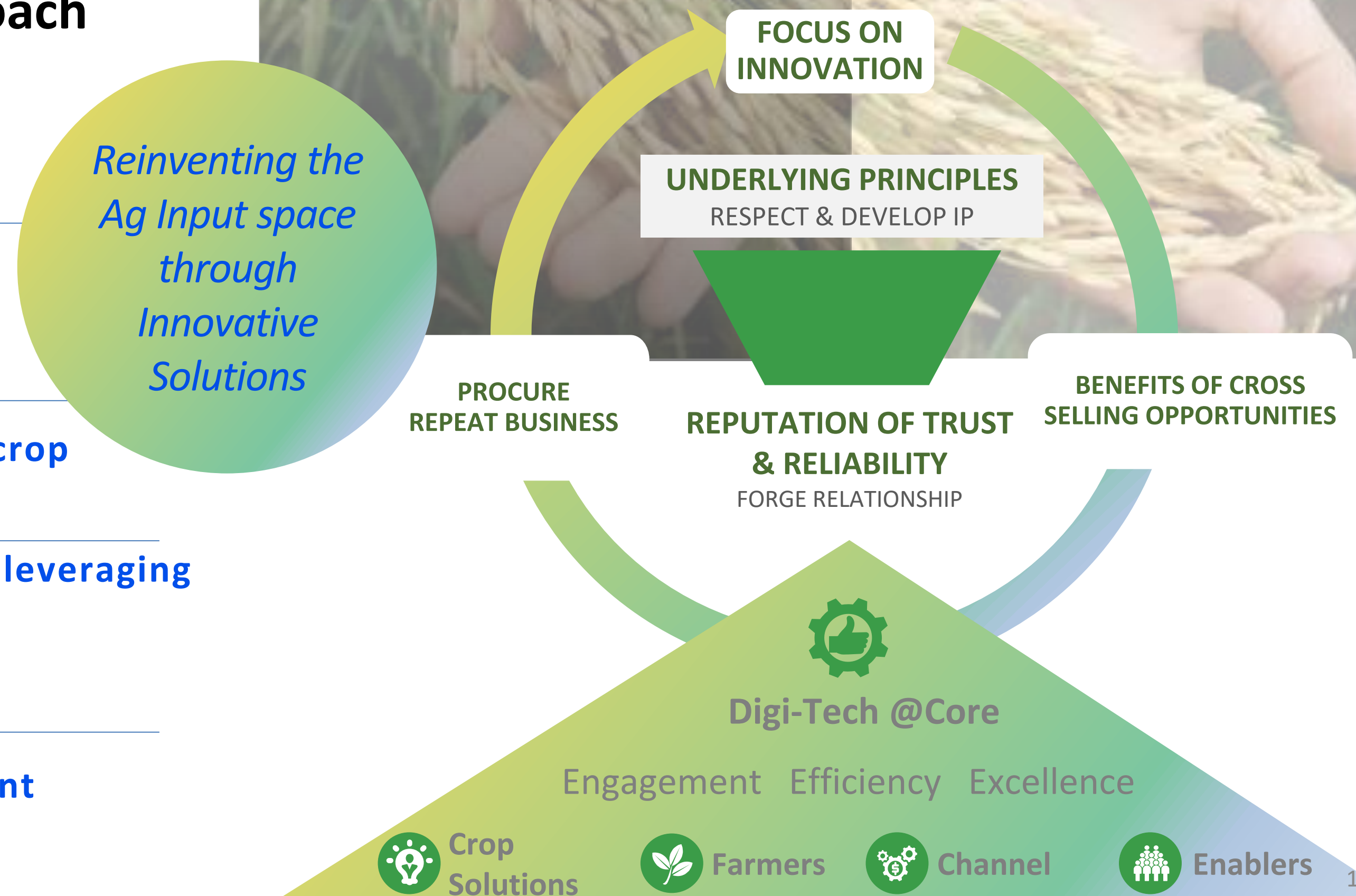
Focusing on 8 strategic crops as a part of crop solution approach

Growth through Innovation, Biologicals & leveraging Partnerships

- New product launches
- Expansion of Biologicals portfolio

Robust pipeline of 20+ products at different stages of development and registration

...Constantly Investing to bring Innovative & Technological Solutions through Research Partnerships, Global Innovators and Inhouse Development....



Momentum for launching new innovative products continued...

FY23



Provide®
Herbicide for Cotton



Dinoace™
Dual action insecticide for cotton



Sectin®
Combination Fungicide



Brofeya®
Revolutionary Insecticide



Ultimare®
Novel Model of action



Taurus®
Nematicide for Vegetable crops



Tomatough®
Biological product for plant health

FY24



Claret®
Unique combination of systemic and contact insecticide



Eketsu™
1st 3-way Rice Herbicide



Kadett®
Combination Fungicide



Pilin®
Bio-fungicide with Novel Mode Of Action



Aminogrow Activ™
Amino acid & Peptides product



Campana™
New systematic insecticide

FY25



Pressedo®
Broad-spectrum novel insecticide



Osheen Ultra®
Superior quality formulation for sucking pest control



Solju™ Gr & Solju™ SP
Unique microbial biofertilizer



Dorito®
Broad spectrum Insecticide



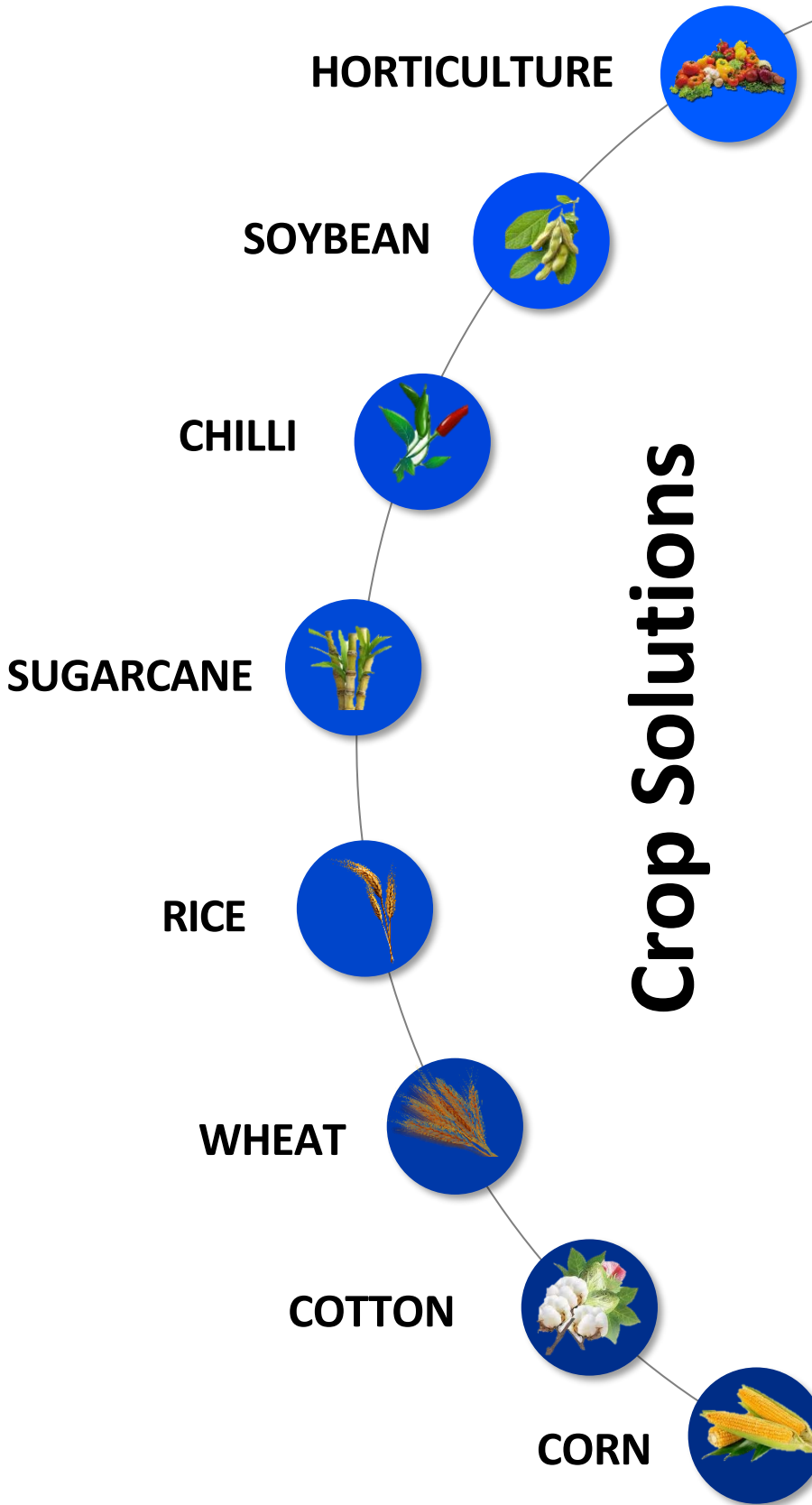
BYROCK®
Fungicide



Kaprigin®
Organic Fertiliser



Vachan™
Insecticide for Leps management



Deep engagement with farmers and channels with innovative approaches

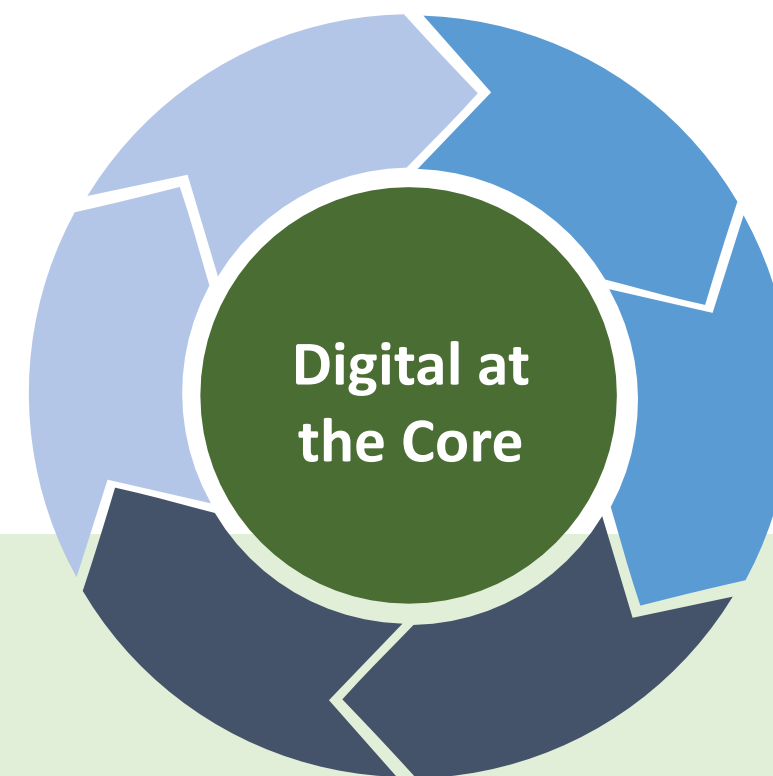
Farmer Connect

- **7 product launches**
- **20+** innovative product campaigns
- **50,000+** product demos
- **1.6+ million farmers connected** across 45,000 villages
- **6.3+ million acreages covered**



Channel Connect

- **80,000+** retailer connect across multiple marketing campaigns



Precision Farming Services

- **10,000+** farmers served across **600+ villages** with spraying machines
- **~0.5 million** acreages covered



Biologicals - PI's future growth engine...

..our passion for over 2 decades

Aspiration Milestone

PI's global biologicals revenue to grow 5x over 5-years

Scale-up Plans

Introduce Products through New Technology platforms

Leverage India Distribution

Research & Development

Complement Seattle Tech Center with R&D Center in India by adding infrastructure & capabilities

Acquire complementary technologies & expand portfolio

Leadership Team to build products & markets



Rafael Del Rio
Chairperson
30+ yr. exp.



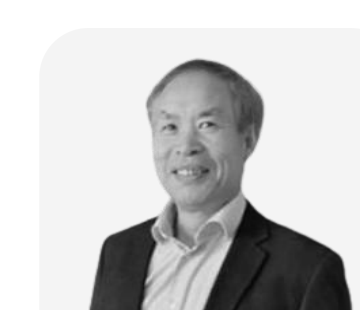
Jagresh Rana
Global CEO
30+ yr. exp.



Piyush Nagar
Head, BD & Strategy
22+ yr. exp.



Anne Suty-Heinze
Global Biological Solutions
Lead 30+ yr. exp.



Zhongmin Wei
Peptide technology lead
25+ yr. exp.



Intellectual
Property

PREtec Technology Platform

Derived from natural proteins, PREtec is an environment friendly technology that stimulates crop growth, ability to withstand abiotic stresses, improves disease control, plant health & yield

- State of the art **R&D Centre in Seattle USA**
- Unique technology: **Harpin $\alpha\beta$**
- **Patented peptide products**

- Sales in USA, Brazil, Mexico, UK, EU
- Global Tech Development team formed as Center of Excellence for field trials, sales support and product recommendation

Assets

Distribution

Global Product Portfolio

Harpin (Obrona®)

Protein technology –
Environmentally friendly

Saori®

Innovative biological seed treatment
for control of critical soybean disease

Teikko®

Control of root-lesion nematode

Pharma - Long term growth engine under strategic buildout

PIHS TODAY

- Solution platform from Discovery through Commercialization
- Knowledge Driven Partnerships
- Global Leadership Team



Dr. Ramesh Subramanian
Global CEO; 21+ yr. exp.



Mr. Franco Moro
Global COO; 40+ yrs. exp.



Dr. Mahavir Prashad
CDO; 35+ yrs. exp.



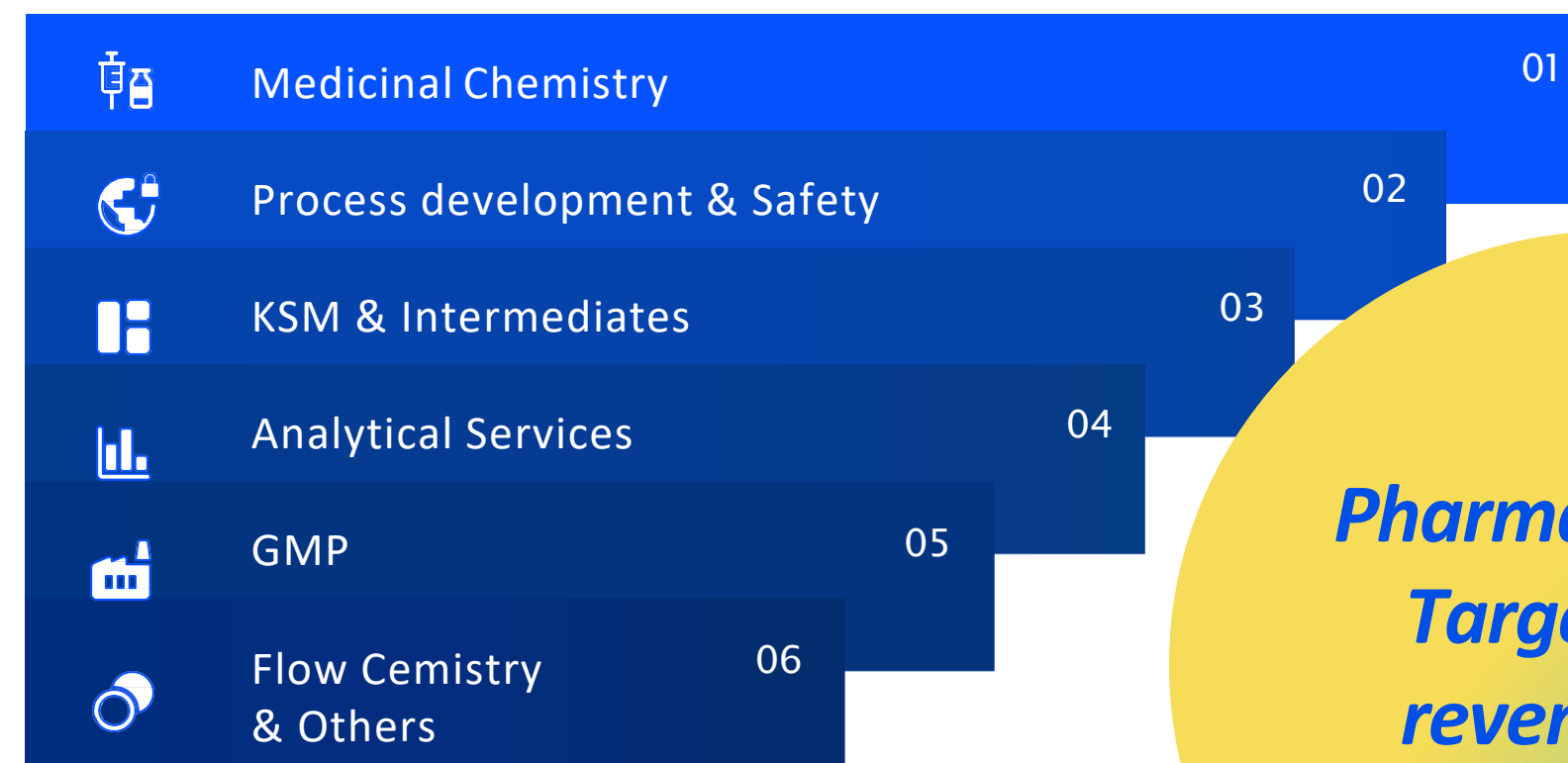
Dr. Simon Haydar
CSO; 20+ yrs. Exp.



Mr. Alessio Piccoli
CCO; 24+ yrs. exp.

- Leveraging Technologies (Flow Chemistry & BioCatalysis)
- State of the art R&D Center, Hyderabad
- Manufacturing sites that combine the best of East (India) and West (Italy)

Integrated CRDMO services



Pharma CRDMO:
*Targeting 3X
revenue over
next 3-4 years*

PIHS Way Ahead ...

Expanding & enhancing GMP site in Lodi, Italy; non-GMP in India

Building relationships with Biotech & Big Pharma through Global Business Development

Strengthening the Regulatory capabilities to be Best-in-Class

Leveraging PI's Scientific & Business Process Capabilities for Pharma

Evaluating OEB 5, HP-PI, Peptide, ADCs, Large Molecules...

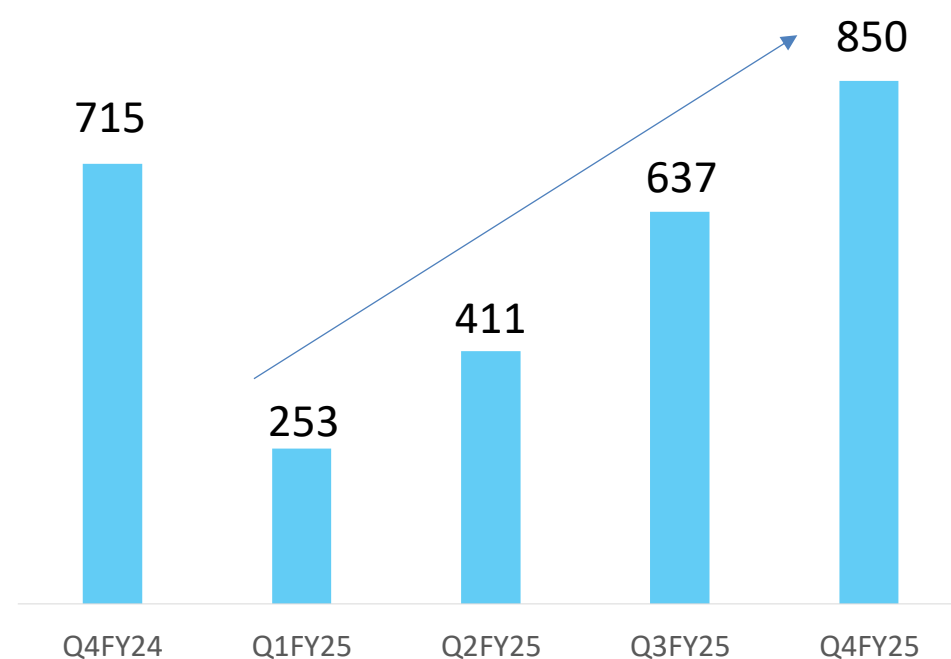
Financials reflect transition to CRDMO delivery model...

..margin drag is one-off and developmental...



Fig in Rs. Million	Q4FY24	Q4FY25	FY24	FY25
Revenue	715	850	3,149	2,151
Gross Margin	62%	41%	65%	52%
Overheads	618	806	2,268	3,067
PBT⁵	(390)	(667)	(1,104)	(2,494)

⁵ Post intercompany eliminations



Reported revenue in Rs. Million

- Revenue accelerated in Q4FY25

FY25 update

- Revenue degrowth is mainly on account of inventory pile-up and deferred offtake of key products.
- QoQ sequential revenue growth clearly reflecting gradual normalization of product offtake.
- Gross Margin drop due to one-time impact of old inventory write-off.
- Overheads increase driven by development spending, doubtful debt provision and other one-off cost.
- Capex ~Rs. 1,275 million of which spend in Lodi ~Rs. 675 mn for Kilo-facilities, R&D Hyderabad is ~Rs 370 mn and Jaipur facility is ~Rs 230 mn.

Outlook

- Good traction of new CRDMO enquiries
- Commissioning of Kilo-facilities in Lodi, Italy in Q1FY26
- Improved order book / business visibility over next 1-2 years
- Expecting to achieve > 75% revenue growth in FY26 with improved margins

Navigating transitory headwinds with focused growth plays...

..targeting single-digit revenue growth for FY26 with sustained margins...



Domestic:

Focus on portfolio diversification
with high quality revenue

- Stable commodity prices coupled with favourable monsoon forecast to drive Agri-sector
- New launches and focus on biologicals to drive growth
- Overall price pressure expected to persist in the generics space
- Focus on quality revenue growth alongside prudent NWC management



CSM Exports:

Technology focused approach
to drive incremental business

- Scale-up of products commercialized over the last 3-years
- Aggressive commercialization of new products in FY26: 8-10 new products
- Continued momentum in new enquiries and conversions
- Cautious optimism despite destocking of inventory and uncertain US tariff regime



Health Science:

Building a differentiated play
in Pharma CDMO space

- GMP Kilo-facilities to begin operations
- Build-up of pipeline projects for CRO and CDMO
- Global business development team in place to intensify leads
- Progressing on the mid to long term growth path



Progressing on strategic
initiatives in line with plan

- Technology development to build new frontiers of growth
- Commercialisation of PI's own NCEs; other leads progressing well
- Strong pipeline of Biological products at different stages of development
- Several inorganic growth opportunities under evaluation

..long term growth outlook remains solid with double-digit growth

PI the Company

An organization that is committed to excellence in whatever it does . . .

known for over 2 decades to be the Top wealth creator . . .

“ **Outshines competitors in delivering business needs of the customers by unlocking value & fearlessly reinventing ourselves** ”



A Trusted Brand & Partnerships

- 5+ decades of relationship with Global innovator companies
- **Zero conflicts** till date

Successful Product Brands & Services

- Amongst **Top 3** in the world in Agchem CSM
- **70% +** revenue from proprietary products

ESG Anchored

- ESG, the ***way of life***
- Featured in the **S&P Global Sustainability Yearbook 2025**



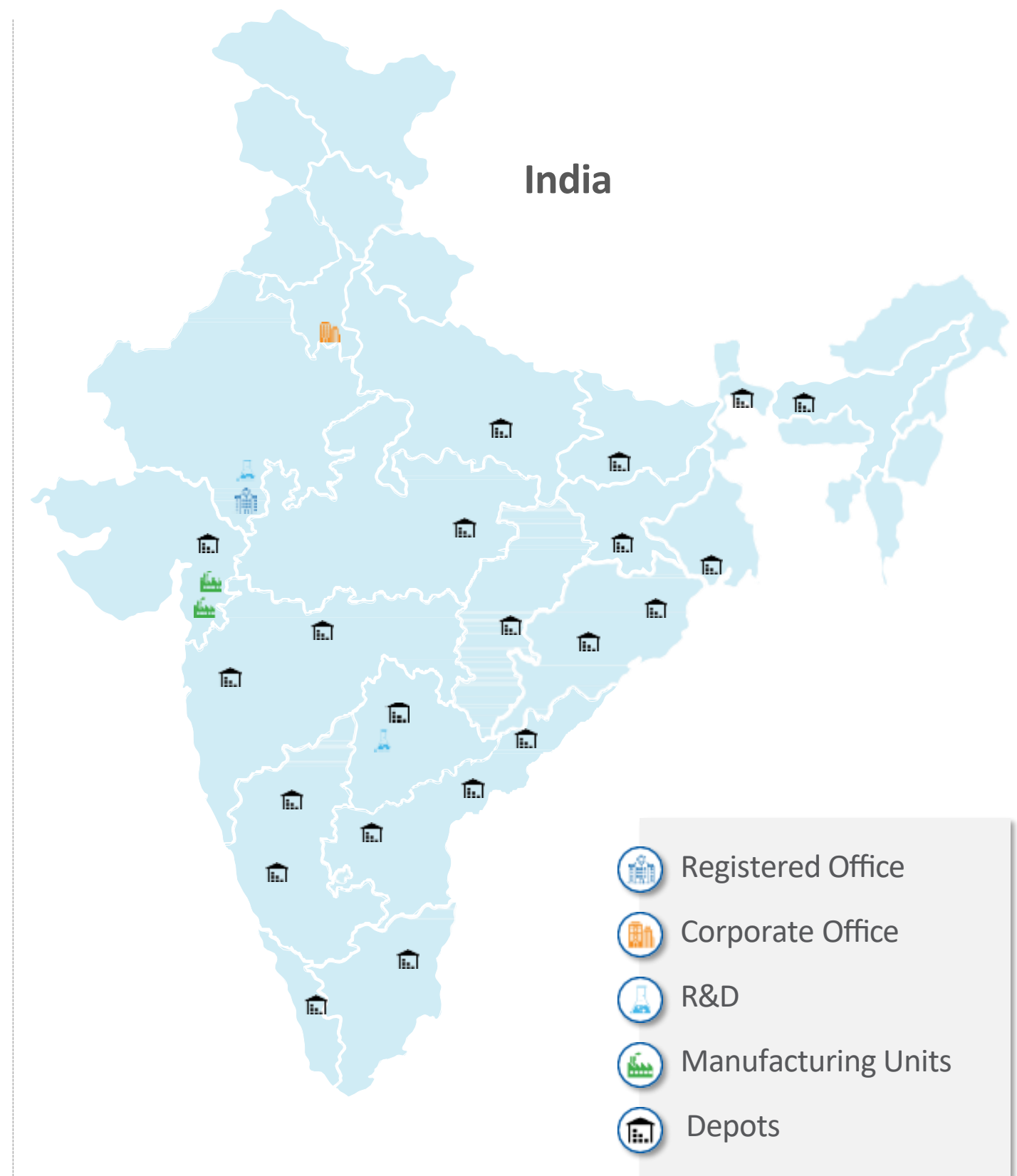
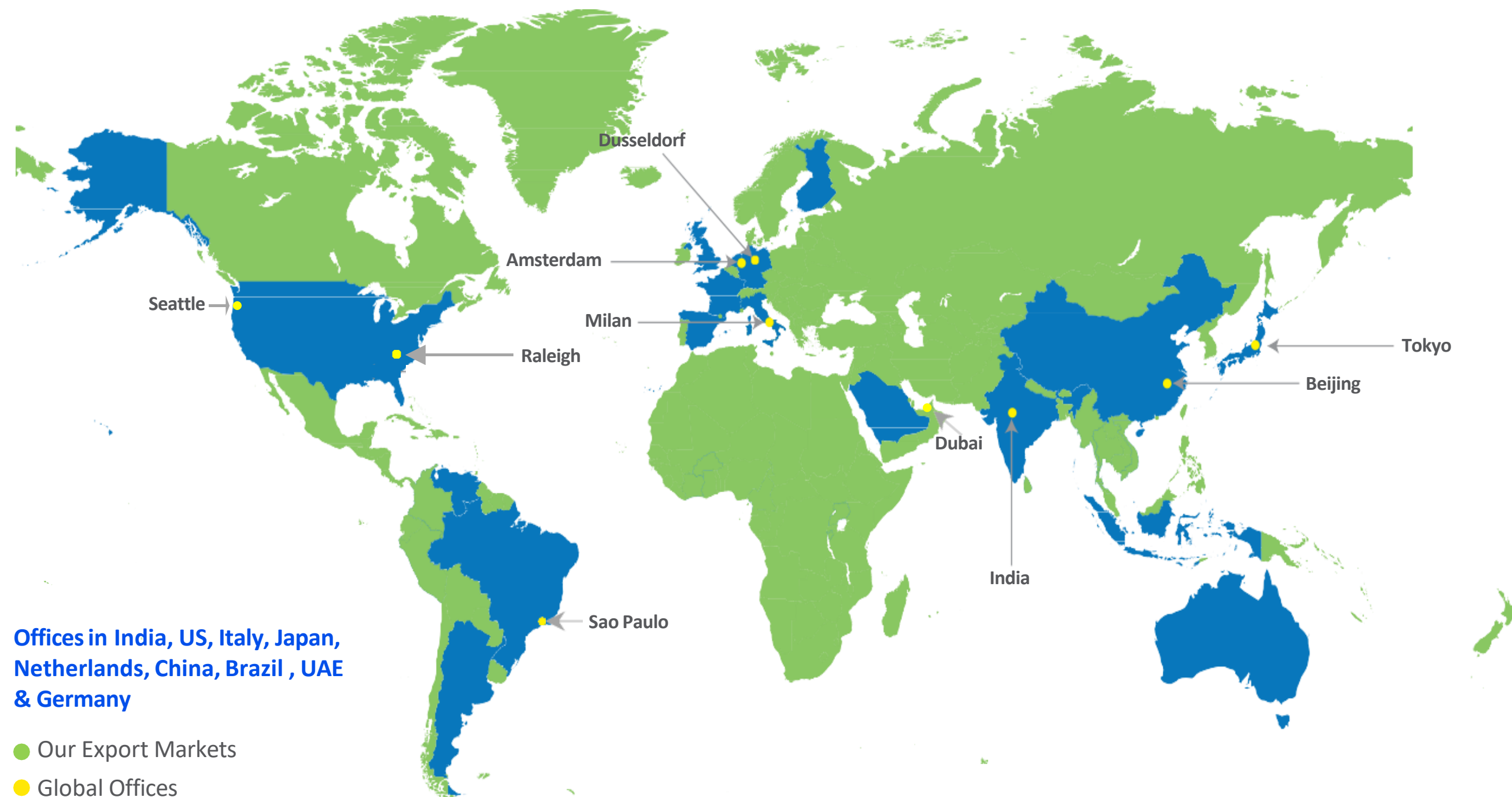
High on Governance

- Non-Executive Chairperson
- 44% of Board Members are **Independent Directors**
- **External evaluation** of Board performance

Investing Ahead Of Time

- Focused on **Innovation**
- Establishing **new frontiers** of Horticulture, Biologicals, Health Sciences
- Building up capabilities in advance – people, digital, technology etc.

Our Global Presence



Strong understanding of international work culture with >6 decades of experience & deep-rooted relationships

Reimagining a healthier planet!



“Lead with science, technology and human ingenuity to create transformative solutions in life sciences”



COURAGEOUS

Think *Bold*, act with *Integrity*
and be *Accountable*.



CURIOUS

Question conventional wisdom,
be *Open-minded*, *Adaptable* and *Curious*



CREATIVE

Differentiate, *Collaborate*, *Experiment*
and *Execute ideas at speed*.



CARING

Be *Transparent*, build *Trust*, bring the best
out of *People* and embrace *Sustainability*.



Partner Centric

First to identify & deliver on
latent needs of our customers



Science & Tech Driven

Sustainable solutions by early
adoption of cutting-edge
science/technology



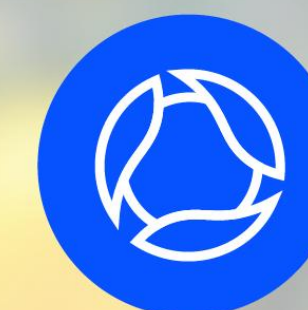
Digital Edge

Integrated digital solutions
to gain competitive advantage



People First

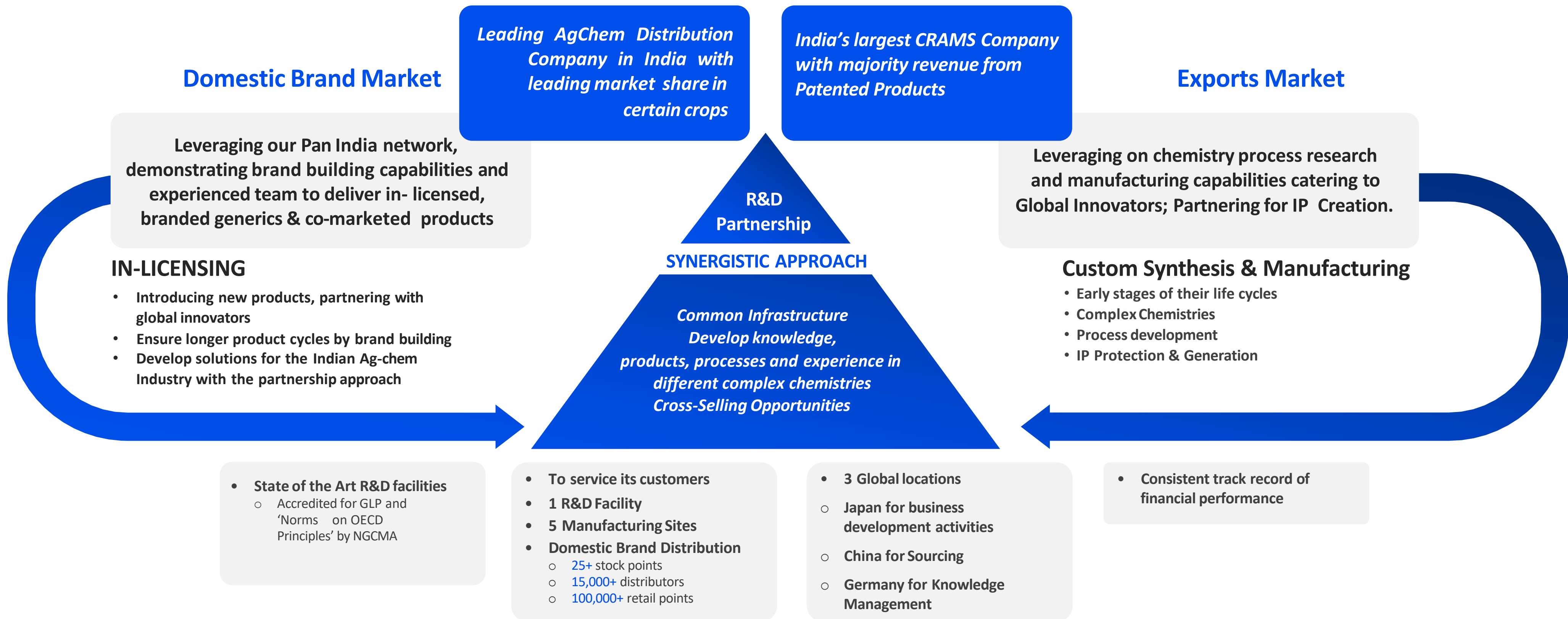
Best opportunities for
employees to learn & grow



ESG Anchored

ESG the way of life

Agchem Business model built on the principles of respect for IP and established relationships



Non conflicting business model ... well respected by Global Innovators as Partners

Multipronged strategy to sustain the growth momentum backed by multiple growth engines & aggressive M&A

Market

Expansion

Creation

Segments

Operation excellence

Brands

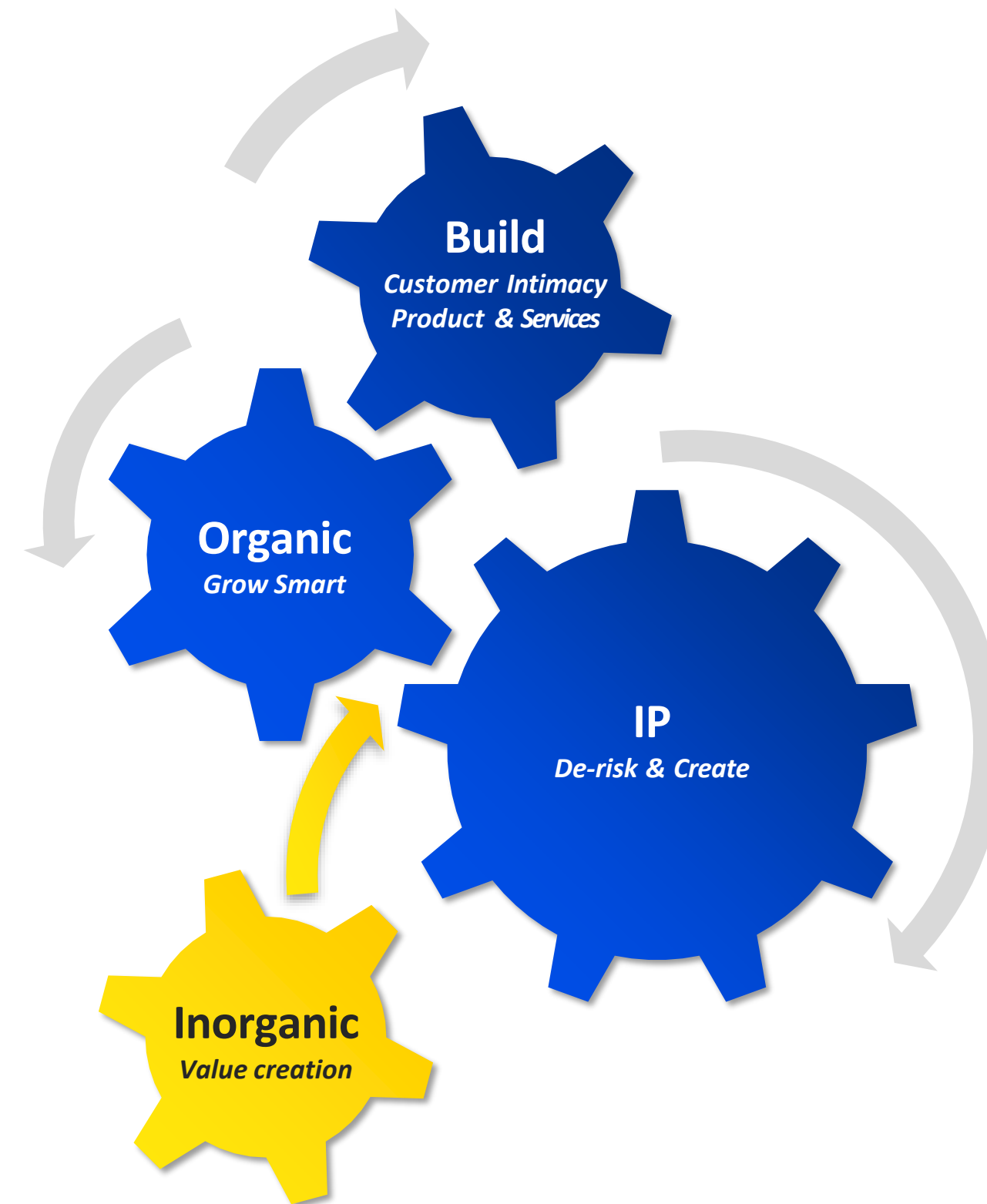
Inorganic

Disruptive Value added
Technologies

Products Assets

Niche vertical with a future
Pharma/ Specialty chemical

High growth application
areas having synergy



Deepening our technological capabilities to open new horizons

De-risk

- Manufacturing concentration
- New formulation of existing products
- Biological

Process

- Chemistry
- Block Builders
- Process engineering
- Flow

Digital

- Information integration
- Decision tools

Multiple Growth Engines / Levers

- Research and process innovation with global partnerships
- Marketing & Distribution - Product Pipeline
- Biologicals
- Horticulture Specialist
- PI Health Sciences - CRDMO

Prudent capital allocation to ensure the long-term shareholder value creation

PI in the S&P Global Sustainability Yearbook 2025...

..ranked among the Top 3 percentile of ESG Rated companies globally



Environmental

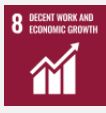


SDG Alignment	Key Highlights*
Environment – Climate change	Reduced CO ₂ emission intensity by ~45% from FY22
Environment – Climate change	Reduced Chemical Oxygen Demand by ~47% from FY22
Environment – Energy management	~7% renewable energy as a share of total electricity consumption
Environment – Water management	Reduced Water intensity by ~39% from FY22
Lost Time Injury Frequency Rate (LTIFR)	0 for permanent employees 0 for contractual workers

* YTD figures subject to audit



Social and Governance



Key Highlights*

Increased employees' average training hours per FTE by **86%**

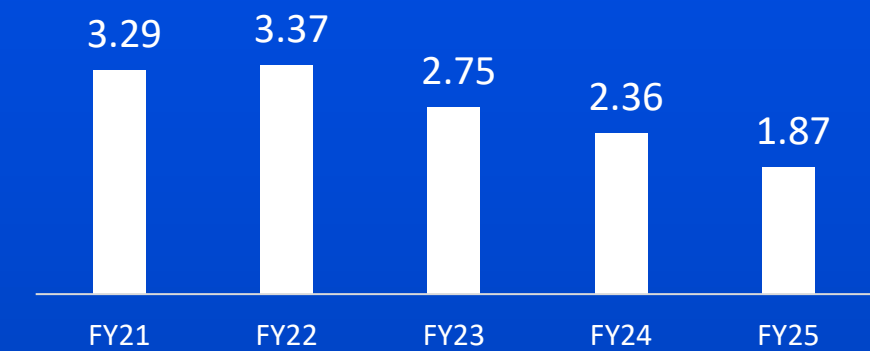
Increased women's participation in leadership positions by **50%**

25,300+ acres brought under sustainable agricultural practices by educating farmers about climate-resilient agricultural practices

70% of enrolled youth placed through skill development initiatives

350,000+ healthcare beneficiaries through Mobile Health units and **65,000+** students impacted through various initiatives

Carbon emissions intensity in terms of revenue from operations (INR million)



Water intensity in terms of revenue from operations (INR million)



Chemical Oxygen Demand (in MT)



Featured in the **S&P Global Sustainability Yearbook 2025** for the second consecutive year

Our CSR efforts focused on community welfare & environment...

CSR policy directed towards inclusive development that creates value for the society

Health & Hygiene

Health & wellness support for rural communities

- Supporting communities in **64** villages in Swasthya Seva Program, **85,000+** beneficiaries reached in FY25
- Supporting **50+** children from underserved communities suffering from congenital heart defects



Women Empowerment

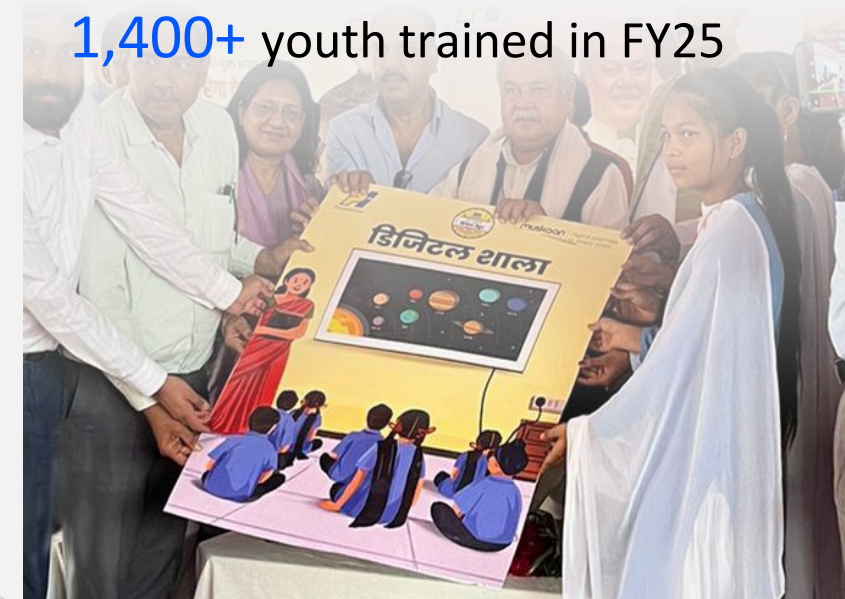
- Program running in **80** rural villages
- **6,500+** women smallholders directly benefitted in Q3, FY25
- **~25%** income levels have increased through this program



Education & Skill Development

Introducing digital learning & smart classes in rural India

- Program supporting **135** schools to improve learning outcomes of children
- **6,300+** students reached and **1,400+** youth trained in FY25



Environment Sustainability

Promoting Sustainable Farming Practices & Biodiversity Conservation

- **30,000+** farmers reached covering **28,000+** acres in FY25 in Sustainable Agriculture project
- **~30,000** trees planted for a significant positive impact on the environment



Recognition underscores PI's leadership, governance and innovation edge



Most Promising Company of the Year
by CNBC TV18 India Business
Leader Awards (IBLA)



**Barclays Private Client Hurun
India Award 2024** for Leadership
Excellence and Vision



**Most Preferred Workplace
2024-25** by Marksmen Daily



**India's Best Trailblazer CEO
(Agro Chemical) for
Mr. Mayank Singhal** by
Corporate Leadership
Awards 2024



**India's Top Value Creator
2024 - Agro Chemicals**
by Dun & Bradstreet



**PI's Agchem Supply Chain
identified as Supply
Chain Champion**
in Agri Business Sector



Gold Award
At India Green
Manufacturing Challenge
2024 for PI Udaipur



**Gold Trophy
NSCI Safety Award 2024** for
Excellence in Occupational
Safety & Health



Inspired by Science

Thank You