



## EARNINGS PRESENTATION – Q4FY23 & FY23

Driving smartly into the future



# **Business Overview**



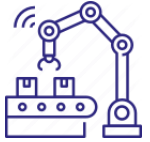
**40+**

Years of experience in tyre manufacturing



**22<sup>th</sup>**

Ranked top tyre company in the world



**12**

manufacturing facilities

**33**

million tyre capacity



**450+**

Total number of SKU's



**100+**

Countries of Operations around the world



**6,000+**

Extensive dealers distribution network



**10,000+**

Employees globally



**25+**

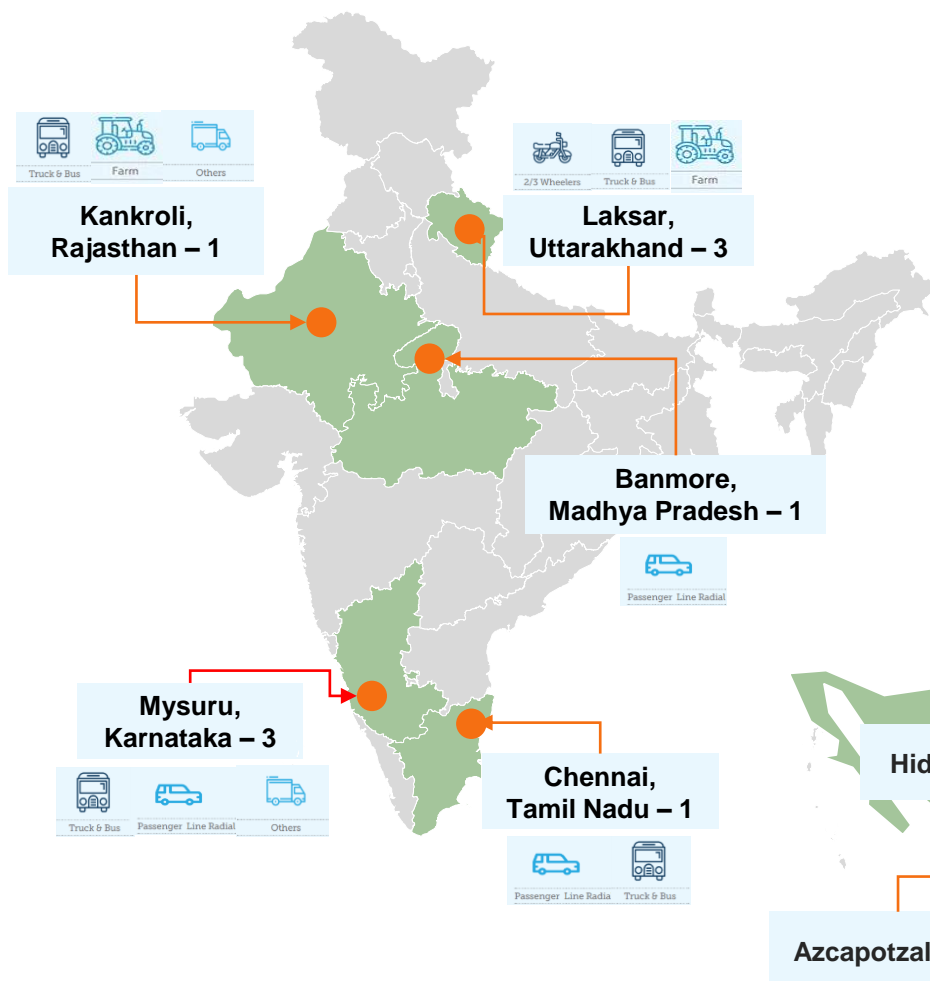
OEM client and relationships

## Innovation at JK Tyre

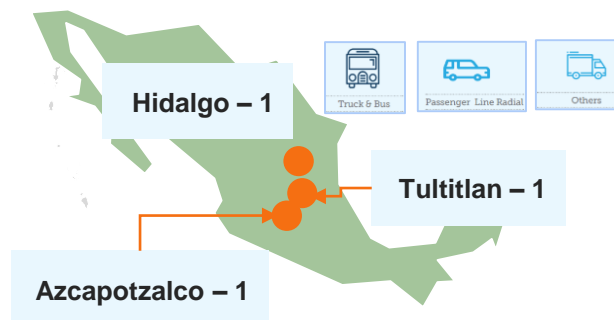
- ❖ Pioneer of radial technology in India and **No. 1 in Truck/Bus Radial (TBR) manufacturer**
- ❖ State-of-the-art Centralized Tech Centre at Mysore – **“Raghupati Singhania Centre of Excellence (RPSCOE)”**
- ❖ **1st company in India with OE fitment of tubeless passenger radials.** Also, 1st in India to launch high performance H, V and Z-rated passenger radial tyres
- ❖ Acquired smart tyre technology start-up to revolutionize Indian tyre market – **First in India to launch Tyre Pressure Monitoring System (TPMS)** based on sensor technology
- ❖ Globally among the **top 3 in lowest energy consumption**

# Global Manufacturing Platforms

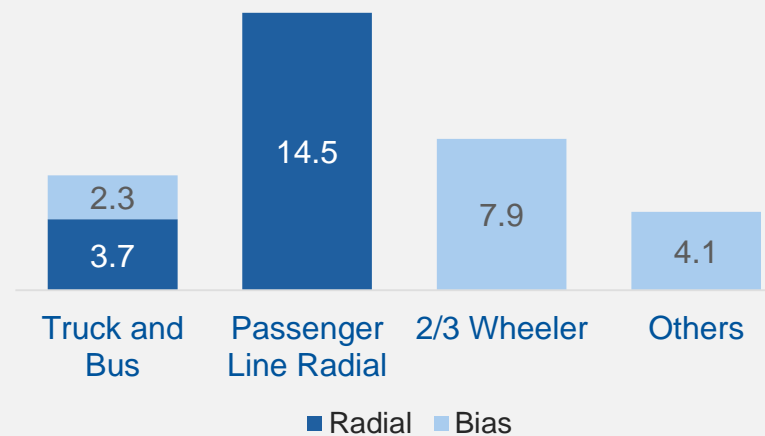
## India



## Mexico



## Annual Capacity by Product Line – Volumes in Million



**Manufacturing Facilities - 12**  
**Installed Capacity - 6,22,000 MT**  
**~33 million tyres annually**  
**Capacity Utilization FY23 – ~86%**

1 Consistent Social Media Presence

2 Content Oriented Digital Marketing

3 Google My Business &  
Always-On-Search

4 E-Commerce Associations  
with Leading Platforms :

**CarDekho & TyrePlex**

- Lead Generation
- Re-Targeting

## Social Media



No.1 Tyre Brand at Social Media in terms of Followers at Facebook & Instagram

## Content Marketing



Tyre Industry Highest no. of views at YouTube 77Mn+ for You Tube Campaign

## Google My Business



600+ Brand Shops listed at Google My Business and being optimized to have better visibility at Google Search

## E-Commerce



To give our customers an alternate touch point to explore and buy JK Tyre

## Lead Gen. & Re-Targeting



For Lead Generation & Re-targeting the prospective customers looking for Tyre at Google

## Awards



Leader in Digital Transformation, Motorsports & Digital PR, Best campaign in Automotive category 'Zindagi ke Pahiye' & Campaign of the Year by World Digital Marketing Congress

# Extensive Distribution Network and Customer Connect



## Extensive Distribution Network

### India Distribution Network

- ❖ 6,000+ Dealers
- ❖ 500 Distributors
- ❖ Tie up with 1260 Fleet Operators
- ❖ Tie up with 3 Oil Marketing Companies
- ❖ 146 Sales, Service and Stocking Points
- ❖ 28 Regional Offices



#### 64 JK Tyres Truck Wheels

Fully equipped Tyre service centre offering Total Tyre Solutions



#### 626 JK Tyre Steel & Xpress Wheels

Exclusive passenger car tyre retailing & services



#### 69 JK Re-tread centres

Value added services such as re-treading

### Mexico Distribution Network

- ❖ 97 Dealers
- ❖ Network of 144 third party dealers/distributors
- ❖ Network of 34 Distributors for Exports

### Other Geographies Network

- ❖ 76 Distributors in Middle East and South East Asia
- ❖ 61 Distributors in Africa
- ❖ 60 Distributors in North and Latin America

## Mega Customer Interaction Programs (CIPs)



4500+ Fleet owners across 40 CIPs



9000+ Farmers across 55+ Kisan Mitra Program

# Leadership Team



**Dr. Raghupati Singhania**  
*Chairman &  
Managing Director*



**Anshuman Singhania**  
*Managing Director*



**Arun K. Bajoria**  
*Director & President – Int.*



**Anuj Kathuria**  
*President - India*



**A. K. Kinra**  
*Financial Advisor*



**Sanjeev Aggarwal**  
*CFO*



**V. K. Misra**  
*Technical Director*



**Dr. R. Mukhopadhyay**  
*Director (R&D)*



**A. K. Makkar**  
*Manufacturing Director*



**Srinivasu Allaphan**  
*Marketing Director*



**Ashish Pandey**  
*Sr. VP–Materials*



**Bharat Aggarwal**  
*Head - International Trade*



**P.K. Rustagi**  
*VP (Legal) & CS*



**Pravin Chaudhari**  
*ED – JK TORNEL*

## Technology – Global Tech Centre (RPSCOE):

- Centralized Tech Center in Mysore, Karnataka with more than 200 R&D and Technology Scientist and Engineers in following facilities: **HASETRI - Asia's first and India's foremost highly versatile and State-of-the-art Tyre / Elastomer Institute** and **JK Tyre Tech Centre**
- R&D efforts focused in the field of advanced materials, alternate materials, nanotechnology, process and product simulations, predictive technology, advanced tyre mechanics, etc.
- **India's Biggest Anechoic chamber for Noise and Vibration Analysis** capable to test all tyres including truck tyres.
- Green Technology – Eco-range of tyres for cars, buses and two wheelers with ultra low rolling resistance.



R&D activities aimed at offering technologically advanced products to gain higher market share and enhanced profitability

# Innovative Products Gaining Traction



## TBR - JUH XF & JDH XF

- ✓ Fuel Saver Technology Design
- ✓ Low RRC & Low Noise
- ✓ High Mileage



## Puncture Guard Tyre

- ✓ Self-repair multiple punctures
- ✓ Hassle-free ride throughout life
- ✓ Better Traction & Ride Comforts



## Levitas Ultra (UHP)

- ✓ Utmost Comfort
- ✓ Low Cabin Noise & high durability
- ✓ Shortest braking distance



## PCR – UX Royale

- ✓ 5 Rib Asymmetric Design
- ✓ Stable Shoulder Tread Blocks
- ✓ Variable Draft Groove Technology



## 2 wheeler - Blaze

- ✓ High Speed Stability
- ✓ Ride Comfort & Smooth Cornering
- ✓ High Mileage & Better traction



## Farm - Shresth

- ✓ Step Lug Design & Superior Tread
- ✓ Superior Dimensions & aesthetics
- ✓ High Load Carrying Capacity & Control

# Product Portfolio Differentiation

## Smart Tyres

Recently acquired smart tyre technology start-up to revolutionize Indian tyre market – First in India to launch Tyre Pressure Monitoring System (TPMS) based on sensor technology

### Key Features and Benefits

Reduces fuel bills by increasing fuel efficiency

Enhances tyre life

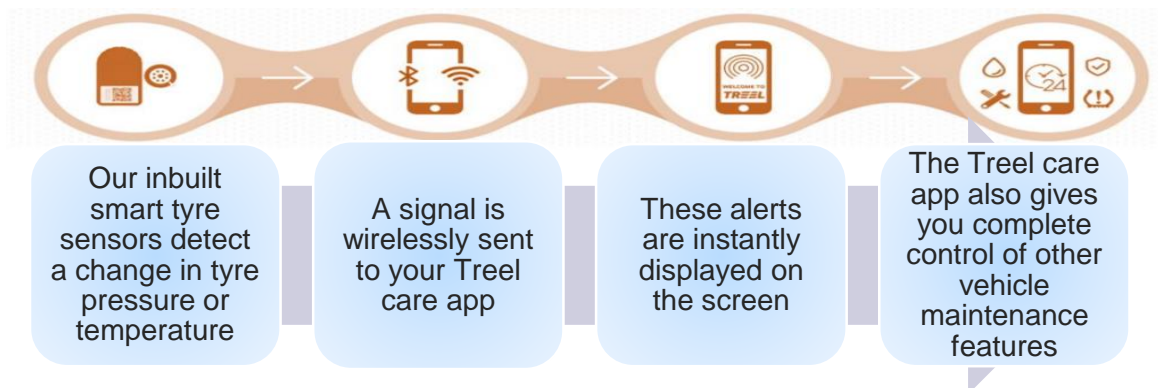
Reduces breakdowns

Offers real time asset tracking to avoid tyre theft

Enables real time mobile application based alerts for inflation & temperature breeches



### How does it work?



## Green Tyres

“Green tyre” technology increases fuel efficiency thereby conserving natural resources

### Key Characteristics

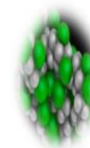
Use eco-friendly materials leading to reduced emissions and increased tyre life-cycle

Offer reduced rolling resistance (RRC) of up to 40% - today we have one of the lowest rolling resistance Tyre in supply

No compromise in safety - globally benchmarked and certified by European test agency (ECE R117)



Silica System with low Hysteresis Loss



2017

RRc 8.5 N/kN

Specialized Green polymer with hyper Bonding Silica Tech



2018-2019

RRc 7.5 N/kN







































Special Alloy Steel Belts Gen.4 Hi performance polyester, Hybrid fabrics



2020-2022

RRc 6.5 N/kN

# Key Customers

Passenger Car	Tractor	Truck & Bus	OTR	2 Wheeler
  <b>HYUNDAI</b> <b>TATA MOTORS</b>  <b>Mahindra</b>  <b>FORCE</b> MOTORS  <b>HONDA</b> 	 <b>Mahindra</b>  <b>TAFE</b>  <b>ESCORTS</b>  <b>JOHN DEERE</b> <b>SWARAJ</b>  <b>SONALIKA</b> INTERNATIONAL  <b>CAPTAIN</b> Pioneer of The Mini Tractor  <b>EICHER</b>  <b>INDO FARM</b> EQUIPMENT LIMITED	<b>TATA MOTORS</b>  <b>SWARAJ</b> <b>MAZDA</b>  <b>ASHOK LEYLAND</b>  <b>BHARAT BENZ</b>  <b>Mahindra</b> Trucks and Buses  <b>VOLVO</b>  <b>FORCE</b> MOTORS  <b>SCANIA</b>  <b>JBM</b> Group	 <b>बी ई एम एल</b> <b>beml</b> NEW FRONTIERS. NEW DREAMS  <b>Bobcat</b>  <b>ACE</b> Hardware  <b>SCHWING</b> Stetter <b>TATA HITACHI</b> Reliable solutions  <b>SANY</b>  <b>JCB</b>  <b>ESCORTS</b>	 <b>Hero</b>  <b>BAJAJ</b>  <b>TVS</b> <b>2 Wheeler – Electric</b>  <b>VVA Auto Industries Pvt. Ltd.</b>  <b>RACCOON</b>  <b>OKINAWA</b> Power the Change  <b>JITENDRA</b> ELECTRIC VEHICLES  <b>BENLG</b>  <b>COSBIKE</b> FUN   FUTURISTIC   FANTASTIC

## Gaining OEM footprint and volumes across segments

### HYUNDAI CRETA, & ALCAZAR



### MARUTI SUZUKI SWIFT DZIRE, SWIFT, WAGONR



### TVS APACHE



### FORCE TRAVELER



### KIA CARENS, & SELTOS



### TATA INTRA



### TATA GOLD



## JK Tyre unveils complete range of EV-specific smart radial tyres

### EV Tyres range

Developed a complete range of electric vehicle (EV)-specific Smart radial tyres for all categories of trucks, buses, LCVs and passenger cars in India.

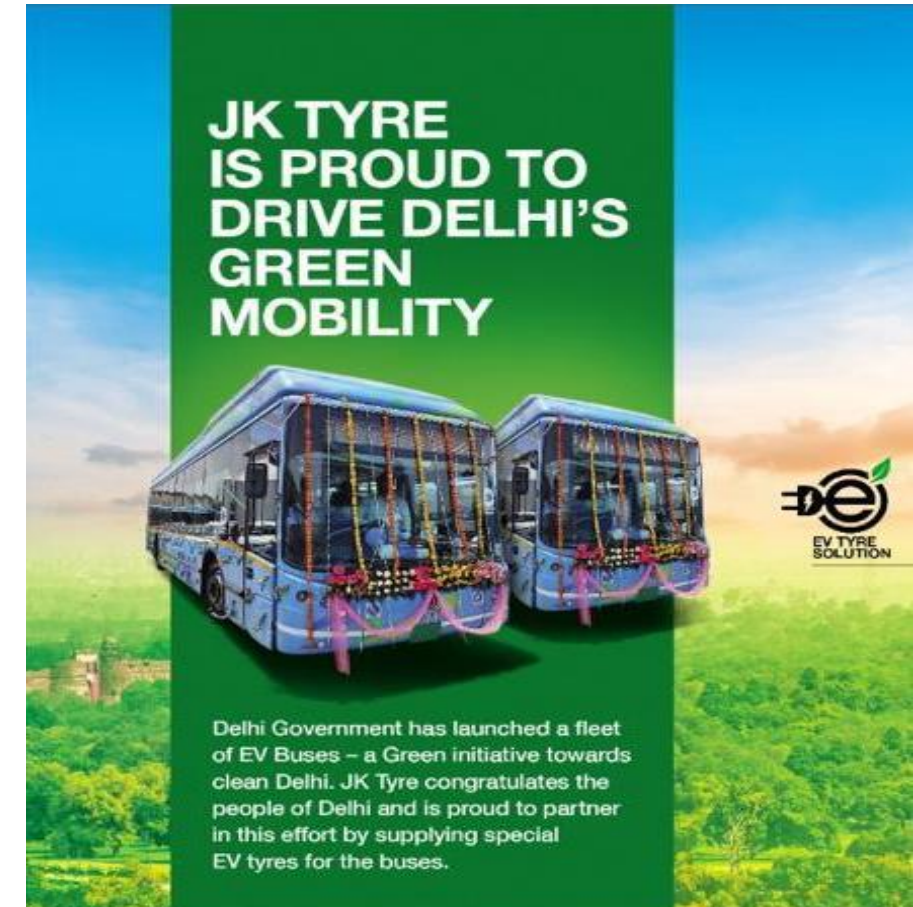
Ensures ultra-low rolling resistance

Improved wet and dry traction



High Durability & low noise

Low energy consumption



Innovation and technology are our core pillars and our product is ahead of its time to meet need of customers and industry

# Key Marketing Initiatives



## LEVITAS ULTRA (UHP TYRE)

- Best in class ride quality & experience
- Lowest cabin noise & high cornering stability
- Shortest braking distance in dry & wet conditions
- Speed Rating – W and Y with 5 star fuel savings

Launch of “The Levitas Ultra (Ultra High Performance) – Made for Dream Machines”

# Key Marketing Initiatives



**INDIAN CAR OF THE YEAR  
2023  
KIA CARENS**



**PREMIUM CAR AWARD  
2023  
MERCEDES-BENZ EQS 580**



**INDIAN MOTORCYCLE  
OF THE YEAR 2023-  
ROYAL ENFIELD  
HUNTER**



**GREEN CAR AWARD  
2023  
KIA EV6**

Presented 18<sup>th</sup> edition of ICOTY & IMOTY Awards 2023, most coveted awards, a platform created by JK Tyre.



## An Iconic Win, 4th Time in a Row!

JK Tyre is proud and honoured to feature among the Iconic Brands of India 2022 at the 5th Edition of The Economic Times Iconic Brands of India

Recognised for “ET ICONIC BRANDS OF INDIA 2022”

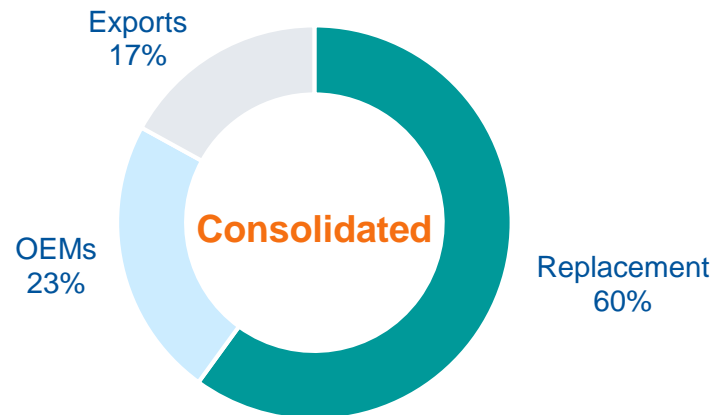


## PROUD TO BE A SUPERBRAND FOR THE 9th TIME!

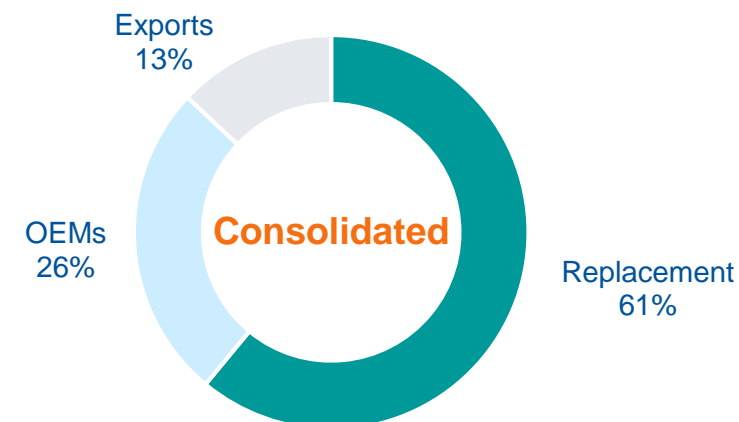
Conferred “SUPER BRANDS 2023”

# Revenue Segmentation : End User Market

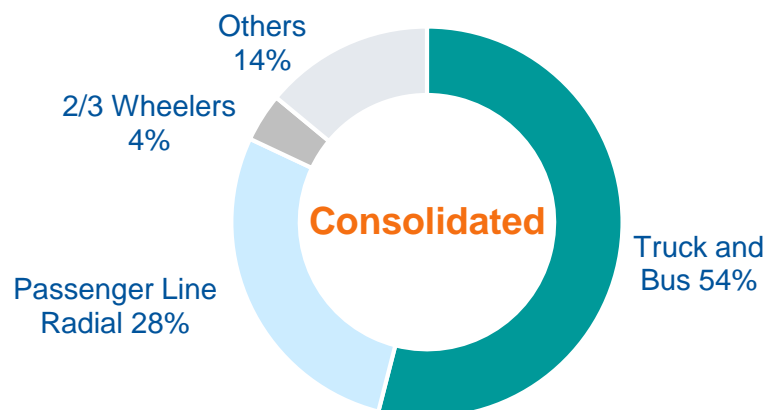
## Revenue Mix by Market – FY23



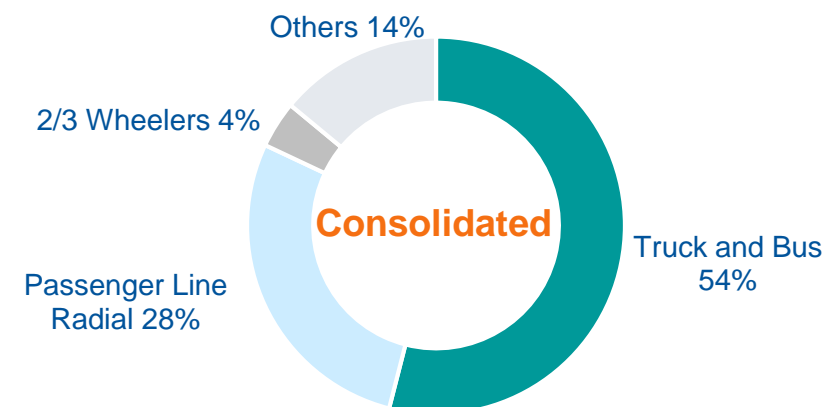
Q4FY23



## Revenue Mix by Product Line – FY23



Q4FY23





# **Q4FY23 & FY23 Performance Review**



# Q4FY23 Financial Performance Highlights



(Rs. Crore)	Consolidated				Standalone			
	Q4FY23	Q3FY23	Q4FY22	y-o-y change	Q4FY23	Q3FY23	Q4FY22	y-o-y change
Turnover	3,645	3,623	3,320	10%	2,404	2,488	2,170	11%
EBITDA	389	349	236	65%	231	218	140	65%
Margin	10.7%	9.6%	7.1%	+360 bps	9.6%	8.7%	6.5%	+310 bps
PBDT (Cash Profit)	263	228	135	95%	158	147	83	90%
PBT	168	113	44	3.8x	98	84	28	3.5x
PAT	112	67	38	2.9x	67	54	26	2.6x
Margin	3.1%	1.8%	1.2%	+190 bps	2.8%	2.2%	1.2%	+160 bps
EPS (Rs)	4.37	2.66	1.63	2.7x	2.71	2.18	1.06	2.6x

# FY23 Financial Performance Highlights



(Rs. Crore)	Consolidated			Standalone		
	FY23	FY22	% change	FY23	FY22	% change
<b>Turnover</b>	<b>14,681</b>	<b>12,020</b>	<b>22%</b>	<b>9,649</b>	<b>8,062</b>	<b>20%</b>
<b>EBITDA</b>	<b>1,334</b>	<b>1,110</b>	<b>20%</b>	<b>806</b>	<b>731</b>	<b>10%</b>
<i>Margin</i>	<i>9.1%</i>	<i>9.2%</i>	<i>(10) Bps</i>	<i>8.4%</i>	<i>9.1%</i>	<i>(70) Bps</i>
<b>PBDT (Cash Profit)</b>	<b>880</b>	<b>691</b>	<b>27%</b>	<b>549</b>	<b>501</b>	<b>10%</b>
<b>PBT</b>	<b>411</b>	<b>309</b>	<b>33%</b>	<b>270</b>	<b>264</b>	<b>2%</b>
<b>PAT</b>	<b>263</b>	<b>201</b>	<b>31%</b>	<b>184</b>	<b>183</b>	<b>Flat</b>
<i>Margin</i>	<i>1.8%</i>	<i>1.7%</i>		<i>1.9%</i>	<i>2.3%</i>	
<b>EPS (Rs)</b>	<b>10.64</b>	<b>8.53</b>	<b>25%</b>	<b>7.45</b>	<b>7.43</b>	<b>Flat</b>

# FY2023 Performance Highlights (Consolidated)



## Key Business Highlights

1. Recorded high revenues of Rs.14,681 crore, driven by strong domestic demand with buoyancy witnessed in OEM segment.
2. Operating margins recovered sequentially to 10.7% in Q4FY23 aided by softening in input costs.
3. Subsidiaries, Cavendish (CIL) and Tornel reported significant improvement in revenues and profitability.
4. Cavendish Industries turned net positive during the year.
5. Net debt stood at Rs.4,518 crore in FY23 viz-a-viz Rs.4,940 crore in FY22.
6. IFC (a member of World bank group) reposed trust in the Company by investing Rs.240 crore (\$30 Million) by way of Compulsorily Convertible Debentures (CCDs) on preferential basis.

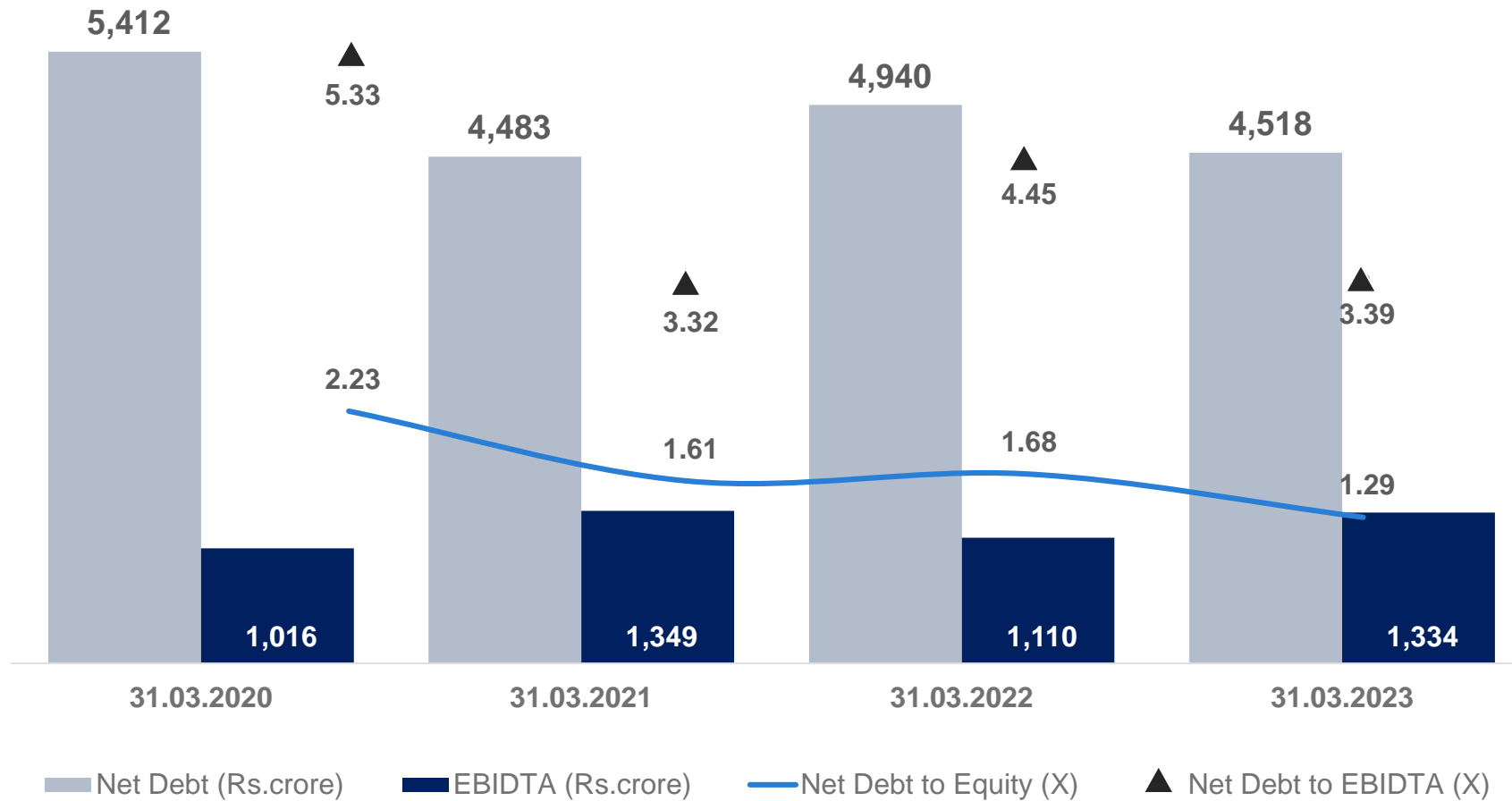
## Q4-FY23 Consolidated Financial Performance

INR 3,645 Cr. <i>Growth 10%</i>	INR 331 Cr. <i>Growth -28%</i>	INR 389 Cr. <i>Growth 65%</i>
Revenues (incl. exports)	Exports from India	EBITDA
INR 263 Cr. <i>Growth 95%</i>	INR 112 Cr. <i>Growth ~3x</i>	INR 4.37 /share <i>Growth ~3x</i>
Cash Profit (PBDT)	Profit After Tax	Earnings Per Share

## FY23 Consolidated Financial Performance

INR 14,681 Cr. <i>Growth 22%</i>	INR 1,787 Cr. <i>Growth -5%</i>	INR 1,334 Cr. <i>Growth 20%</i>
Revenues (incl. exports)	Exports from India	EBITDA
INR 880 Cr. <i>Growth 27%</i>	INR 263 Cr. <i>Growth 31%</i>	INR 10.64 /share <i>Growth 25%</i>
Cash Profit (PBDT)	Profit After Tax	Earnings Per Share

# Debt Movement and Financial Metrics position



**Significant reduction in Net Debt in FY23 over FY22**

**Net Debt to EBIDTA  
FY23 - 3.39x  
FY22 - 4.45x**

**Net Debt to Equity  
FY23 - 1.29x  
FY22 - 1.68x**

*Continuous journey towards deleveraging to improve overall leverage ratio*



# Growth Strategy



Management remains fully committed to implement its strategy to further expand its market presence and gain market share

## Strengthen Market Position across Segments

1. Focus on increasing volumes across all product segment in replacement and export segment
2. Expanding distribution channel through exclusive brand shops across PAN India to gain market share.
3. Extensive use of digital & AI tools

## Increase Global Business Share

1. Launching eco range of products for cars and buses (E-vehicle) fitted with ultra low rolling resistance tyres in domestic and export marketplace
2. Enhancing geographical reach in Europe, Australia and South Africa with wide product range

## Deleverage Balance Sheet

1. Committed to reduce long term borrowings significantly in next 2 years.
2. Accelerated reduction in borrowings through improved profitability

## Maximizing Benefits of Acquisitions

1. Acquired entities are contributing significantly to top and bottom line, creating value.
2. Substantial enhanced capacity across all product segments

## Product Portfolio Premiumization

1. Technologically advanced and eco-friendly tyres in line with market requirements
2. Dedicated domain experts for OHT/2W tyres to handle export markets



**Sustainability**

We strengthened our ESG initiatives around 5P's sustainability platform



## SUSTAINABLE DEVELOPMENT GOALS



\* Conceptualized by JK Tyre

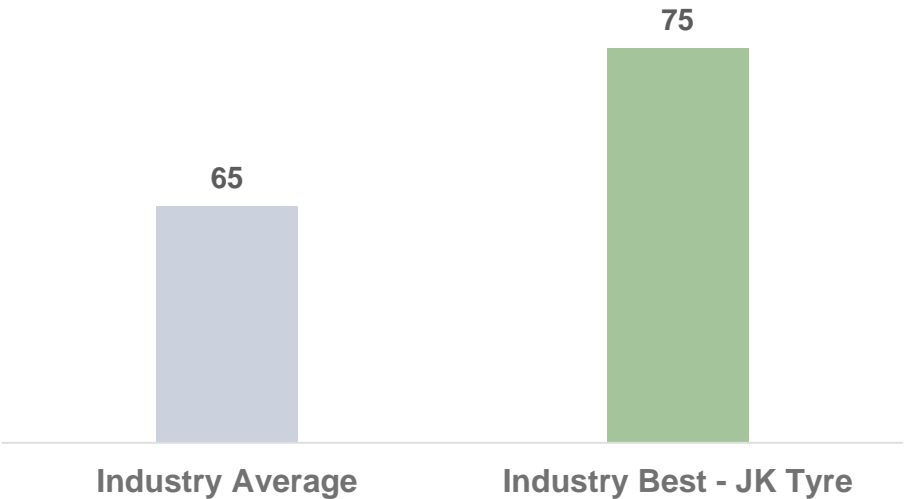
# JK Tyre secured 'Best in Class' rating on ESG performance - CareEdge



JK Tyre's ESG performance is driven by strong commitment and performance on majority themes to ensure ESG integration.



JK Tyre ESG Score Vs. Avg. Industry Score



Environment (80) – Long term vision on reduction in GHG emissions and water management.



Social (73) – Robust policies and practices to mitigate social risks.



Governance (74) – Well designed policies, disclosures and compliance adherence.

## Sustainability initiatives & practices leading to resource conservation and manufacturing excellence

### Research & Development Led

- Usage of Bio sourced materials
- Higher usage of recycled material

### Product Development Led

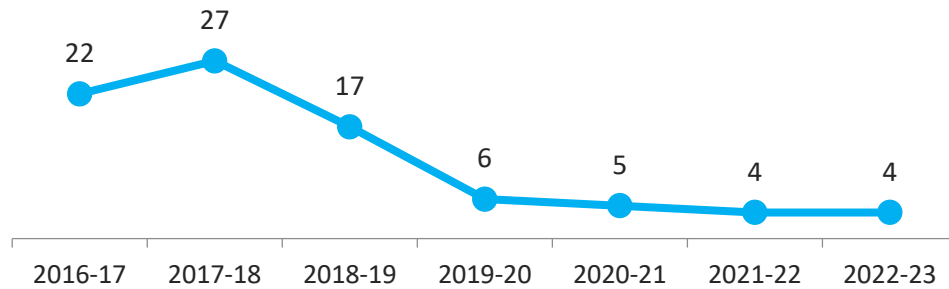
- Continuous improvement in RRC ( Rolling Resistance Coefficient)
- Continuous improvement in tyre dynamics, life and performance

### Manufacturing Led

- All plants in India awarded with “Sword of Honour” by British Safety of Council, UK and 3 locations awarded with “Globe of Honour” for highest safety standards
- GHG Emission – Reduction in Carbon footprints
- Energy Conservation – Global benchmark
- Material Conservation – Process waste reduction
- Raw water usage – Global benchmark
- Plantation and Alternate Fuel – eCO2 sequestration & Green Coal (Bamboo & Biomass)
- Manpower Productivity – Improved MDPT
- Zero Waste to landfill
- Single Use Plastic free

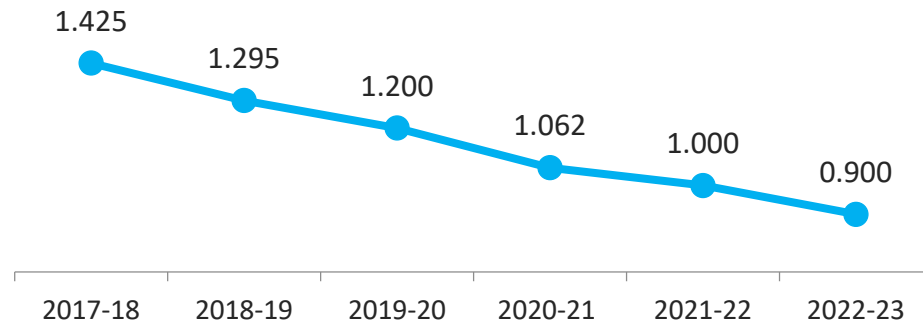
# Sustainability – Environment

## Safety – Reportable Incident (Nos.)



All Plants awarded with “Sword of Honour” by British Safety Council, UK and 3 locations awarded with “Globe of Honour”

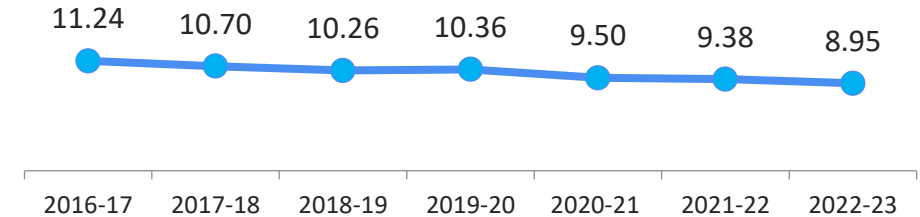
## Green House Gas (GHG) Emission – Eq. CO<sub>2</sub> / MT



Reducing GHG Emission every year, among top 5 globally

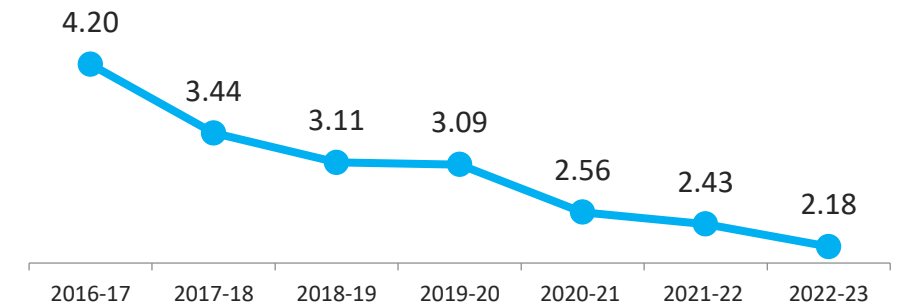
Source : Internal Estimates

## Energy Consumption (GJ / Tonne)



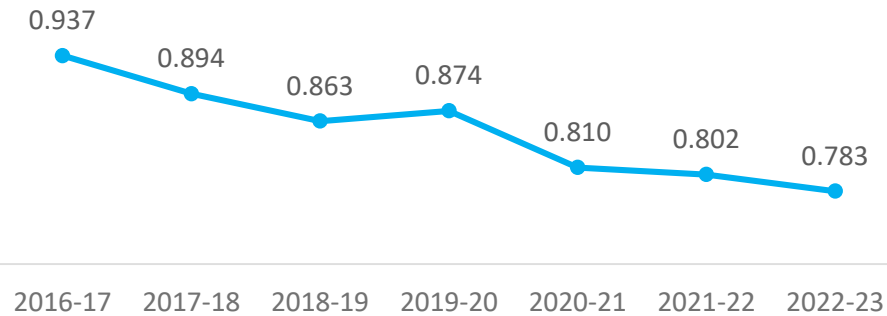
World's Lowest energy consumption per ton of finish product, amongst top 3 globally

## Raw Water Consumption – KL / Tonne



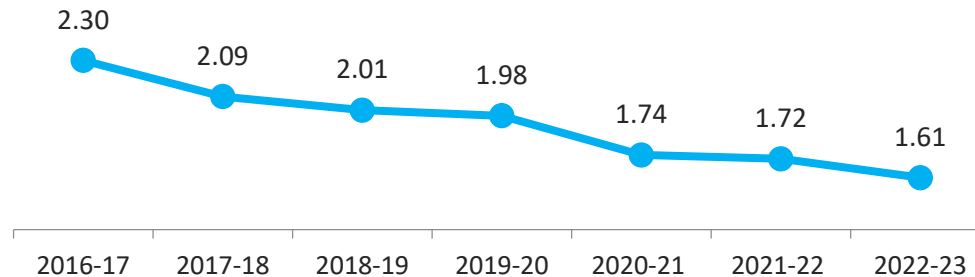
Lowest Specific Raw Water Consumption Globally

## Specific Power Consumption – Kwh / Kg



Reducing Power Consumption trend every year

## Specific Steam Consumption (Kg / Kg)



Achieved the best consumption level in FY23

Source : Internal Estimates

## Recognitions to our efforts



**“Among the India’s top 30 Most Sustainable companies, organized by Business World”**



**“ Energy Management Award for exemplary implementation of ISO 50001 Energy Management System Standard by Clean Energy Ministerial ”**



**“ National Water Award for Excellence in Energy and Water Management by CII ”**

# Corporate Social Responsibility (CSR)



## Livelihood Enhancement

More than 1 lac people benefitted through our projects, viz., skill building, SHGs, agricultural & livestock development etc.

## Education

Adult literacy programs in remote villages (over 50,000 beneficiaries), Mysuru prisoners (over 6,000), Adoption of three ITI's (over 5000 students benefitted), road safety awareness campaigns etc.  
Lakshmipat Singhania School in Jaykaygram, Rajasthan (more than 6,000 students in last one decade)

## Healthcare & Sanitation

HIV/ AIDS prevention programs, reproductive and child health care program "Parivartan", health camps & eye Camps, toilets construction under Swachh Bharat Mission .  
PSRI Hospital & Research Institute (Multi-speciality state-of-the-art hospital in New Delhi)

## Water Conservation & Environment

Construction / De-siltation of water tanks (Benefited >1 Lac farmers) & farm ponds, field bunding and plantation

## COVID Management

Donated oxygen plant, oxygen concentrators, hospital beds, medicines, masks, PPE kits, sanitizers, food packets to hospitals, health centers, poor and needy people.

**More than 10 Lac people have been benefitted through our CSR Initiatives.**

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