



GTFL:SEC:2022

May 29, 2022

BSE Limited

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

(Company code: 509557)

National Stock Exchange of India Ltd.

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

(Symbol: GARFIBRES, Series: EQ)

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

Dear Sirs,

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

Schedule of the Investor / Analyst Meet / Conference:

Date	Investor / Event	Mode of Meeting	Type of Meeting
May 30, 2022	Ambit Capital Private Ltd. - Analyst / Investor`s conference	Physical	One-on-One / Group Meeting
May 31, 2022	DAM Capital Advisors Ltd. - Analyst / Investor`s conference	Physical	One-on-One / Group Meeting
May 31, 2022	Group Meeting	Physical	Group Meeting

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

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

Please acknowledge this communications.

Thanking You,

Yours faithfully,

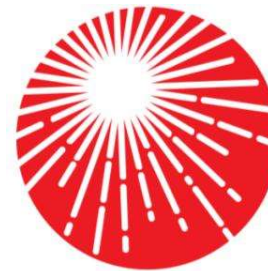
For **GARWARE TECHNICAL FIBRES LIMITED**

Sunil Agarwal
Company Secretary
M. No. FCS6407

Registered Office

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

Better Ideas in Action



GARWARE
TECHNICAL FIBRES

www.garwarefibres.com

Garware Technical Fibres Limited – At a Glance

- Pioneer in Technical Textiles in India
- Rs. 6089 Cr market capitalization*
- Presence in 75 countries
- 5000 + Work Force
- We produce 80MT per day & 20,000 SKUs
- Great Place to Work Certified.
- Well qualified team of 22 scientists and 5 Ph.Ds

75

Patents filed

23

Granted



**Great
Place
To
Work®**

Certified

MAR 2022 - MAR 2023

INDIA

TM

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



GARWARE
TECHNICAL FIBRES



Our Four Pillars of Value





GTFL Infrastructure



Manufacturing facility at Pune

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

Products

Ropes
Rope Articles
PPMF Yarns

PPMF Twines
Geo Textiles
Metal Gabions

Cargo Nets
Gangway Nets



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

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

Products

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

Sports &
Adventure Nets
Safety Nets

Agricultural Nets
Coated Fabrics



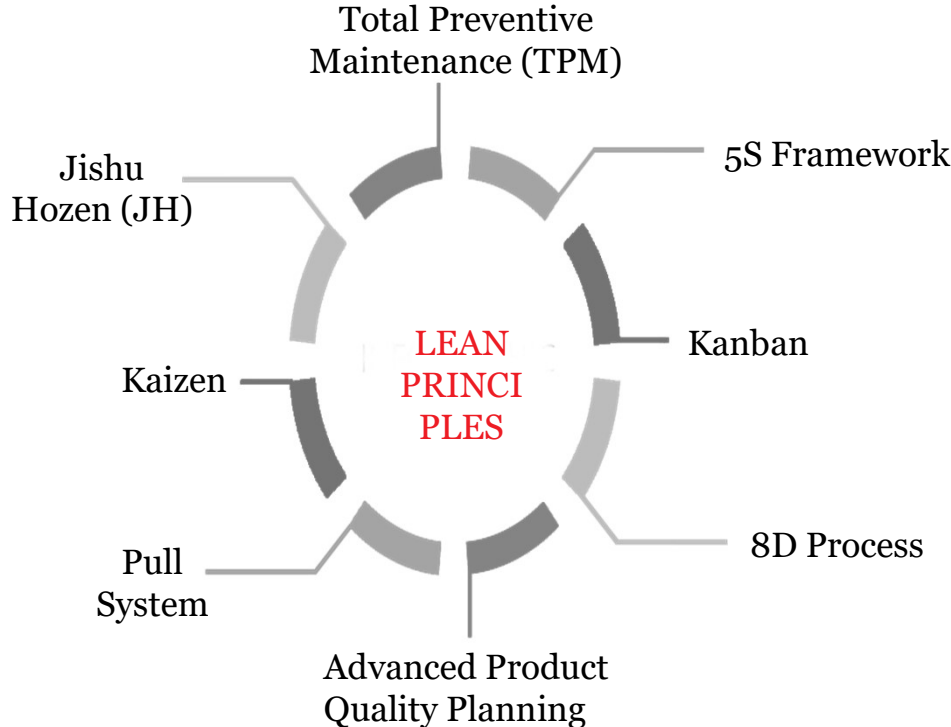


Wai Facility

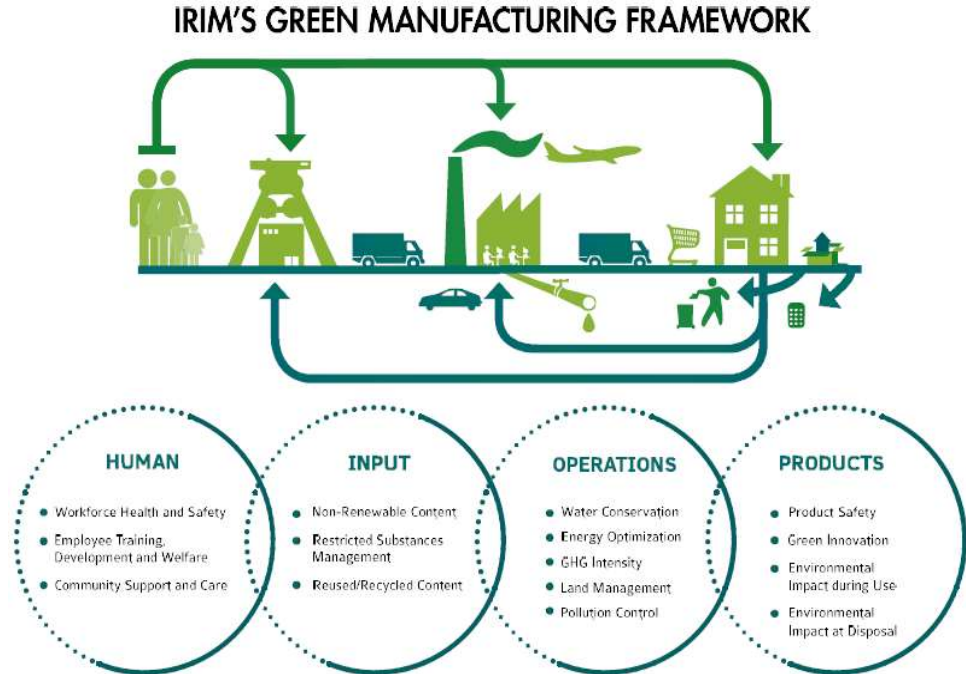


Netloft

GTFL's Strong Focus on Manufacturing Excellence



Silver award – India Green Manuf. Certification Challenge





GTFL

Application Areas

Our Innovative, Application focused Solutions Portfolio...



Fisheries

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



Aquaculture

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



Shipping & IPD

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



Sports

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

Our Innovative, Application focused Solutions Portfolio...



Agriculture

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



Geosynthetics

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



Coated Fabrics

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



Plateena

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



GTFL

Aquaculture
Business

World's Largest Producer of Aquaculture Nets



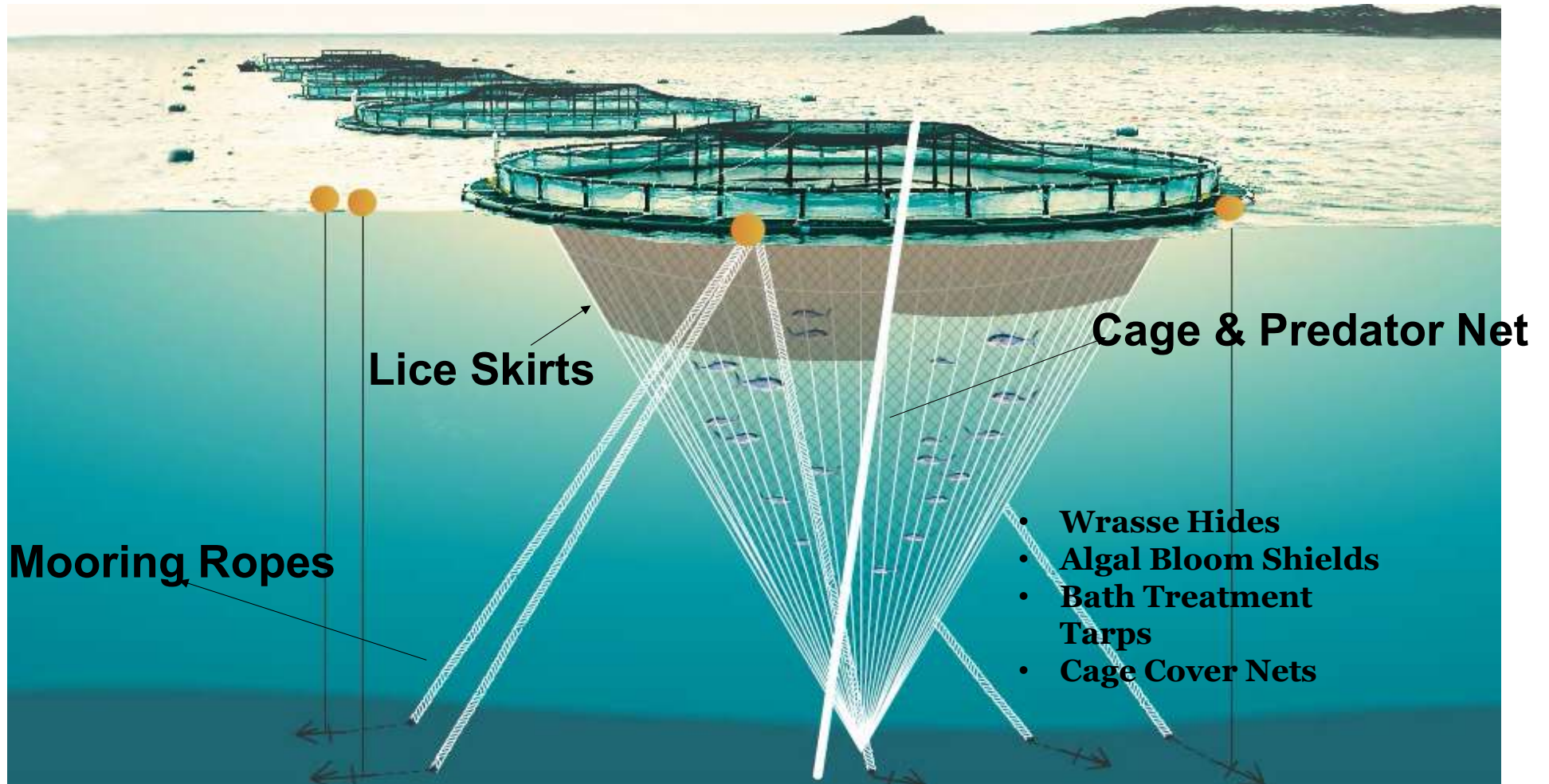
Preferred
Partner for
Aquaculture
Nets.

Aquaculture

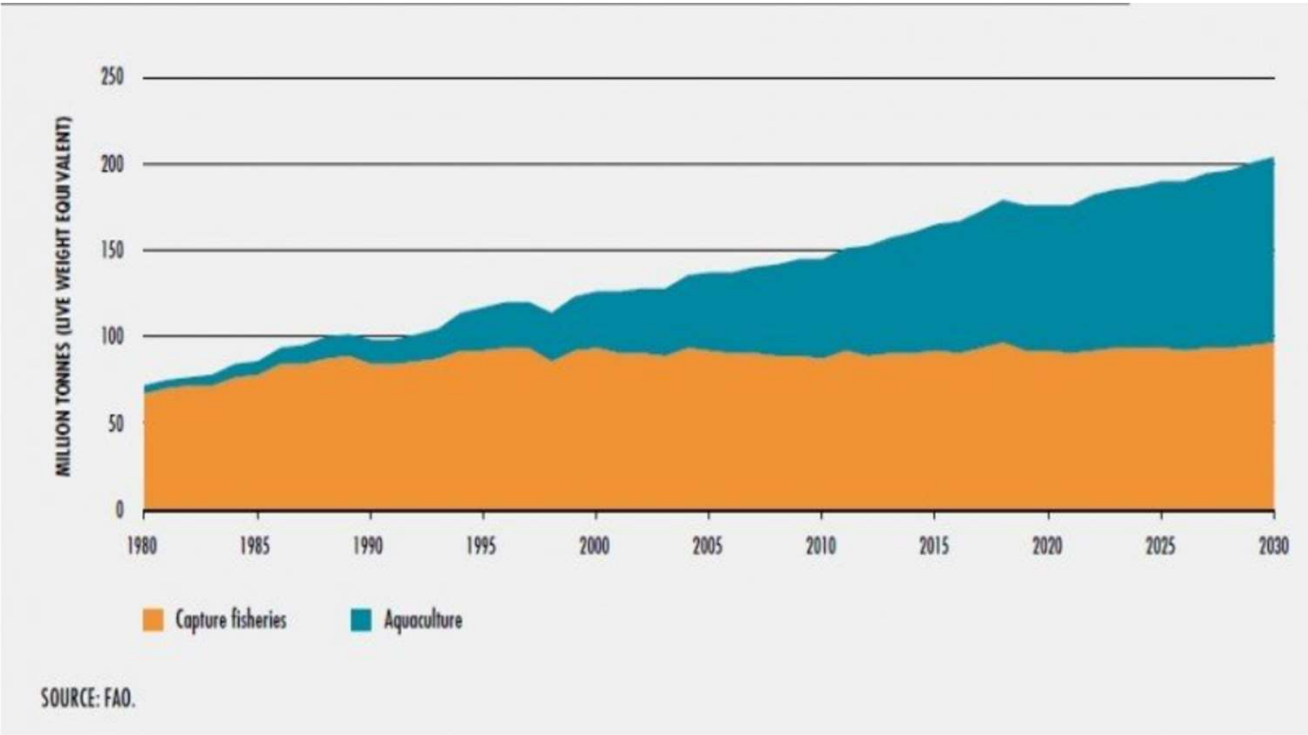
- In farmed salmon aquaculture, each cage holds 800-1000 MT of salmon valued at USD 4-5 million (e.g. : 205m circumference * 35m depth/ 163m circumference * 55m depth)
- The cage nets used have to be extremely resilient to the currents, predators and also ensure no fish escape
- We are the No.1 supplier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



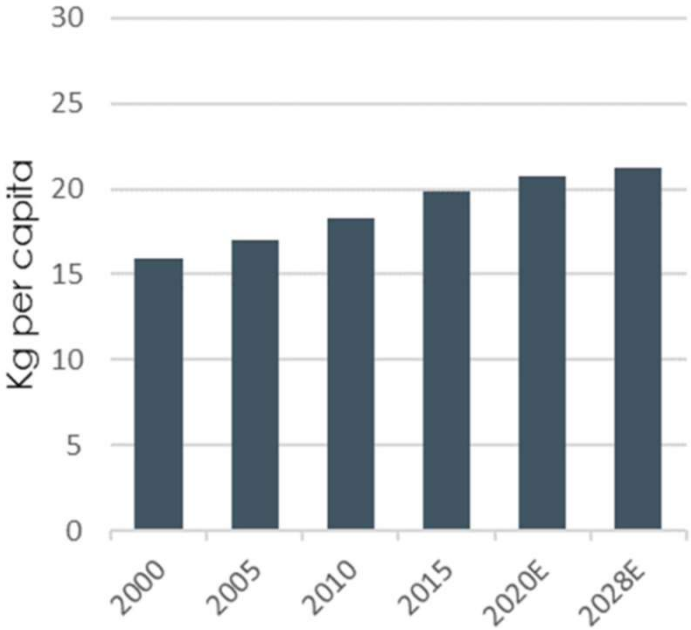
Holding Salmon Farmer's most Valuable Asset



Growing aquaculture demand and consumption



Development of global average fish consumption



Salmon Industry

- Oslo Seafood index price is reflecting a healthy high of 1885 and is well above YoY 1557



Aquaculture Industry – Key Challenges

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MATERIAL SUSTAINABILITY



- Fish Escapes
- Predation
- Sea Lice Management
- Bio-fouling Management



- Carbon Footprint



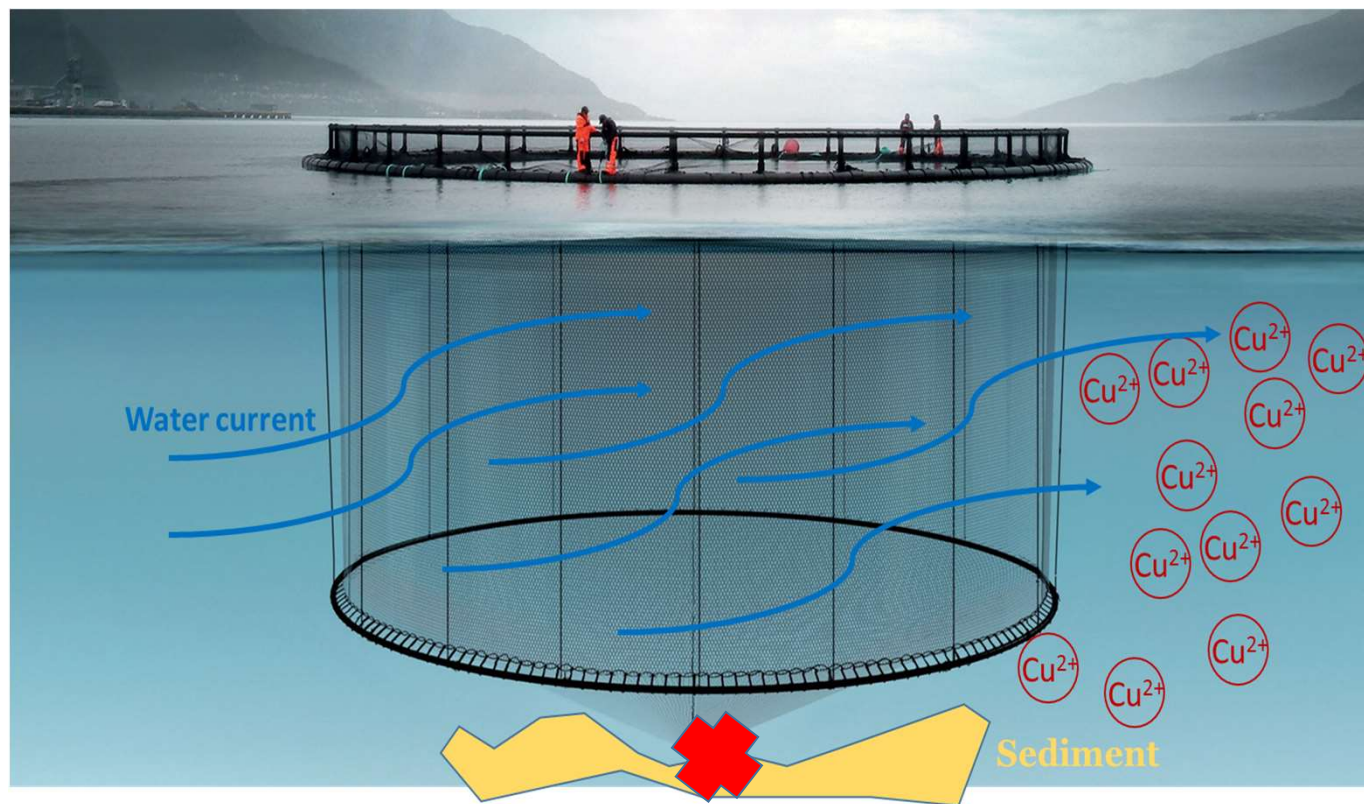
Aim to Support for Better Fish Health and Growth

Better Ideas in Action

Biofouling Management

www.garwarefibres.com

Key Challenges – Bio Fouling and Copper Sedimentation



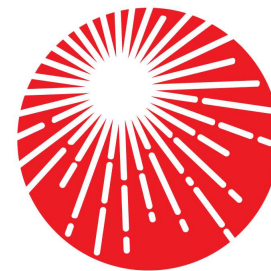
Top

Challenges in
Aquaculture

- Causing an annual release of more than 1000 Tons of copper into Norwegian waters alone.
- This is added with current high cost of cleaning operation during the production cycle.
- Frequent net cleaning causes loss of appetite leading to reduced biomass growth

Better Ideas in Action

GTFL
Sports Nets Business



GARWARE
TECHNICAL FIBRES

www.garwarefibres.com

Sports Nets business of GTFL

- The sports nets business has a double digit CAGR in Sales Value for last 5 years
- Under the sports portfolio, we provide around 50 different products conforming to International Standards.
- GTFL holds the major market share in the tennis nets and baseball netting segment in the US
- GTFL holds the major market share in the soccer nets segment in UK

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GTFL
Marine Fisheries

Fisheries

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

India



Up to 300 HP

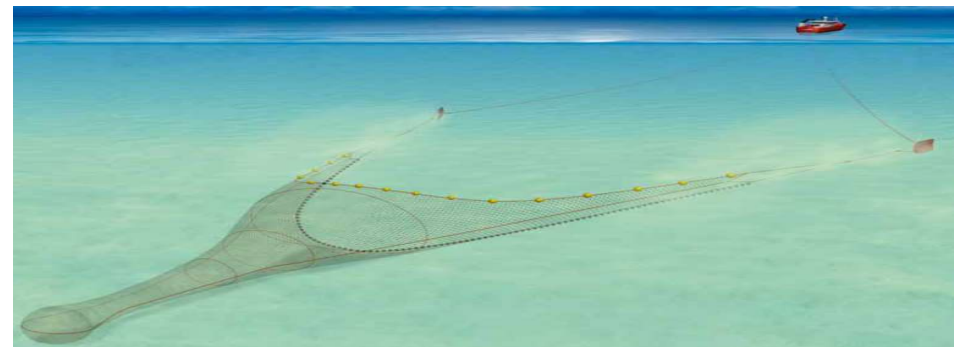
Global



Up to 18,000 HP

Fisheries

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



VALUE FOR CUSTOMER

FISH CATCH

(Catch per voyage need to increase)

&

FUEL EFFICIENCY

(Diesel consumption per voyage need to decrease)

Fisheries



SNG
bottom
Trawl



SNG
made
Trawl



Pelagic
Trawl



Pelagic
Trawl

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GTFL
Geo-synthetics
Business

Geosynthetics – A Brief Overview

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

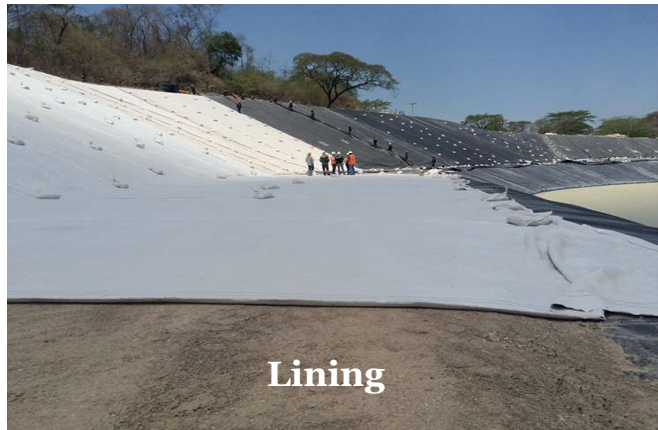
- Roads
- Railways
- Airports
- Ports



Geosynthetics - Benefits

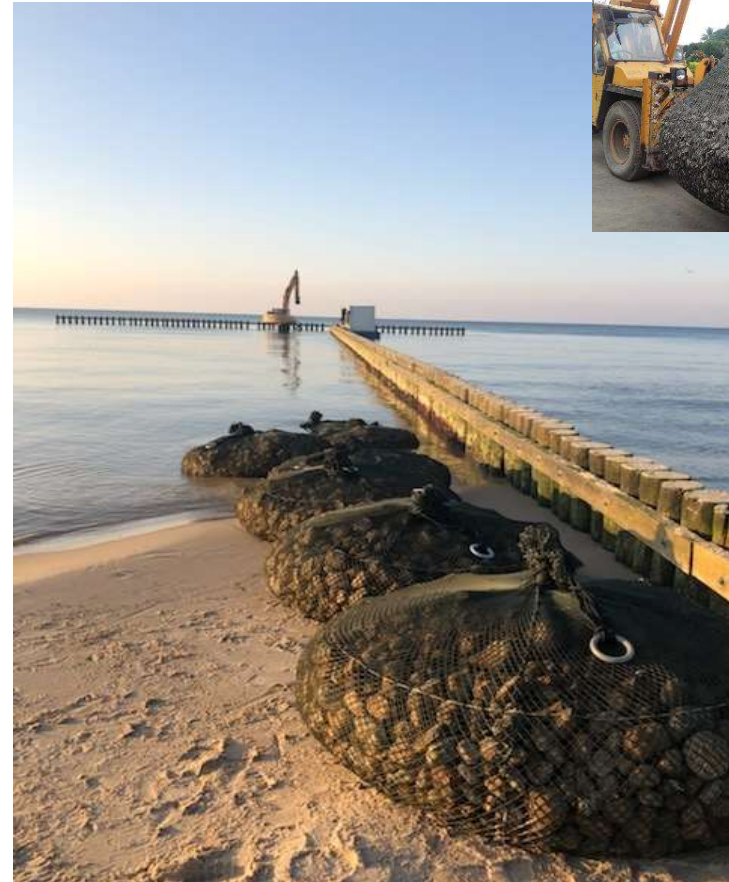


Focused Applications



Case-Studies

Product: AquaRockBag, Application: Coastal Erosion



Gdansk Maritime Office, Sea Coast Erosion Protection in Poland, Europe

**Courtesy our distributors Roess Nature Group and their partner in Poland*



Case-Studies

Product: Geotextile Bag/ Geotextile Container, Application: Temporary retention



Singapore river bank protection using Geo-containers, Singapore

Future – Rockfall Protection and Erosion control

- Out of a total allocation of Rs 110 L Cr by the Central Government under the National Infrastructure Pipeline from 2020 – 2025, Roads & Highways share is Rs 20 L Cr. And Railways is Rs 14 L Cr.
- There is an increasing awareness of the need to protect roads from disasters like rock fall / landslides, etc that impact the safety of the road users. Nowadays, Clients like NHAI, NHIDCL, etc. which are the owners of these highways do not give completion certificates to Contractors unless the safety aspects are taken care of by them.
- Limitations of land availability along highways means that Clients have to depend on modern and innovative techniques for stabilization
- Additionally, there are separate tenders that are being floated specifically to cater to safety aspects of Roads & Highways
- With road safety gaining importance, this is a key driver for the GEO business wherein the business model of design+ supply+ installation positions Garware as a single stop source for solutions.
- New products developed by the R&D team also add to the innovativeness of solutions proposed by Garware

Future – Rockfall Protection and Erosion control

- There is a similar momentum in Railways for protection of running as well as new tracks.
- This is one of our core sectors and demand is growing well.
- Garware's solution for erosion control are currently being tried out on a major project, with a good scope for penetration across the country, once the project is completed successfully.

Future – Landfills & Linings

- Landfills are increasingly being recognized as the most viable alternative for disposal of solid waste. Garware is well positioned as a reliable turnkey solution provider for industrial waste landfills.
- The key driver for industrial waste landfills is industrial production and mining . As industrial production and mining increases, so also the waste to be disposed of according to environmental norms
- Proactive legislation on this front along with stiff penalties on erring industries are also a key driver for growth of the landfill business
- Ability to provide a reliable high quality turnkey solution from design to implementation adds value to the client.



GTFL

Recognitions

The Economic Times Polymers Award

We are pleased to inform you that your company Garware Technical Fibres LTD. [for X-18-Ultra Stiff Net] has been adjudged as the Winner at 'The Economic Times Polymers Awards 2022' in the category of Open (Large).



6th EDITION

THE ECONOMIC TIMES
POLYMERS
Awards 2022

Excellence in Plastics

24th February 2022 | Sahara Star, Mumbai

Powered By
YUDO
HOT RUNNER SYSTEM

Lubricant Partner
Mobil

Supporting Partner
DOMO
caring to our formulae

The Economic Times Polymers

Mr. Shujaul Rehman- CEO of the Year Award by The Economic Times Polymers.



GTFL - The Plastics Export Promotion Council Award

Awarded by The PLEX Council for Fish Nets for the Year 2020 to 2021.



GTFL – The Sports Goods Export Promotion Council Award

Awarded by The Sports Goods Export Promotion Council for achieving the Highest Export of Sports Goods & Toys for the year 2019 to 2020.



GTFL – Maharashtra Industrial Development Corporation

MAHARASHTRA INDUSTRIAL DEVELOPMENT CORPORATION

(A Government of Maharashtra Undertaking)

HEAD OFFICE : "Udyog Sarathi" Marol Indl. Area, Mahakali Caves Road,
Andheri (E), Mumbai - 400 093
Tele : (022) 2687 0052 / 52 / 54 / 27 / 73 Fax : (022) 26871587
PRINCIPAL OFFICE : 4, 4 (A), 12th Floor, World Trade Centre, Complex I,
Cuffe Parade, Mumbai - 400 005.
Tele : (022) 22151451 / 52 / 53 Fax : (022) 22188203
Website : www.midcindia.org, www.maharashtraaitparks.com
Email - feedback@midcindia.org



॥ उद्योगार् सक्तल समृद्धि ॥

MIDC

CERTIFICATE OF APPRECIATION

AWARDED TO

M/s.Garware Technical Fibres Ltd. (Formerly Garware Wall Ropes Ltd.) **C-1 Plot**, Wai MIDC, Dis-Satara 412803, India

For Outstanding work done toward reducing water consumption Avg. **Qty - 16560 KL/Annum (Qty - 1.65 Cr. Ltrs** of Potable Water / Annum), since last 1 years (2021-2022) as per our records.

We appreciate your contribution to take care of Natural resources by reducing the water consumption continuously.

Date:- 18th Day of May-2022

Authorized Signature

Sandip Pawar 18/05/2022
(Shri. S.S.Pawar)
Sectional Officer
MIDC, Section, Wai

No/D E/STR/8-66847/2022
Office of the Deputy Engineer
M.I.D.C Sub Dn-1 Satara
Date 18/05/2022.

GTFL – Inventicon Business Intelligence



Experienced Management Team



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

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



Mr. Shujaul Rehman
Chief Executive Officer

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



Mr. Mukesh Surana
Chief Financial Officer

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



Experienced Management Team



Mr. Vivek Kulkarni
President–Operations

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



Mr. Ravendra Mishra
Head-Human Capital

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

Better Ideas in Action

INDIA • USA • UK • CANADA • AUSTRAILA • CHILE • NORWAY

www.garwarefibres.com

Thank You

