

SEC: 20/2023-24

Date: November 09, 2023

National Stock Exchange of India Ltd.

Exchange Plaza, 5th Floor,
Plot No. C/1, G Block,
Bandra- Kurla Complex,
Bandra (East), Mumbai – 400 051

BSE Limited

1st Floor, New Trading Ring,
Rotunda Bldg., P. J. Towers,
Dalal Street, Fort,
Mumbai 400 001

Symbol: PYRAMID

Scrip Code: 543969

Through: NEAPS

Through: BSE Listing Centre

Dear Sir/Madam,

Sub: Investor presentation of earnings call with analysts/ investors

In compliance with Regulation 30 read with Para A of Part A of Schedule III and other applicable provisions of Securities and Exchange Board of India (Listing Obligations and Disclosure Requirements) Regulations, 2015 and further to our announcements dated November 04, 2023 on earnings conference to be held on November 09, 2023, we enclose herewith a copy of the investor presentation.

The intimation is simultaneously uploaded in the company's website at <https://pyramidtechnoplast.com/investor-presentation/>

Kindly take the above information on record.

Thanking you,

Yours faithfully,

For Pyramid Technoplast Limited

Chandrakant Joge
Company Secretary

Enclosure: As above

PYRAMIDTM

Technoplast Ltd.

Strong • Safe • Superior



PYRAMID TECHNOPLAST LIMITED

Investor Presentation
November 9th, 2023

Safe Harbor



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Pyramid Technoplast: An Overview



Founded in 1997, Pyramid is a prominent industrial packaging company known for our polymer-based molded products



Specialize in rigid Intermediate Bulk Containers (IBCs), Polymer Drums and Mild steel drums used by the chemical, agrochemical, specialty chemical, and pharmaceutical industries.



Pyramid operates across 7 manufacturing units with capacities of 22,818 MTPA for Polymer Drums, 420,000 Units of IBC, and 10,800 MTPA for MS Drums.



Robust network of domestic and international distributors and vendors, with a commitment to customer satisfaction.



Fully automated machines with advanced blow molding technologies are utilized in the manufacturing process.

Pyramid Technoplast: in Numbers



7

Manufacturing
Units



**Pan-India
Presence**



376 +
satisfied customer



Fleet of **54**
Trucks



Team size
465+



Production Capacity

IBC - 420,000 Units

Polymer Drum - 22,818 MTPA

MS Drums - 10,800 MTPA



**3 Year CAGR
FY21-FY23**

Revenue - 24%

EBITDA - 26%

PAT - 37%



FY23

ROE - 29.6%
ROCE - 28.8%



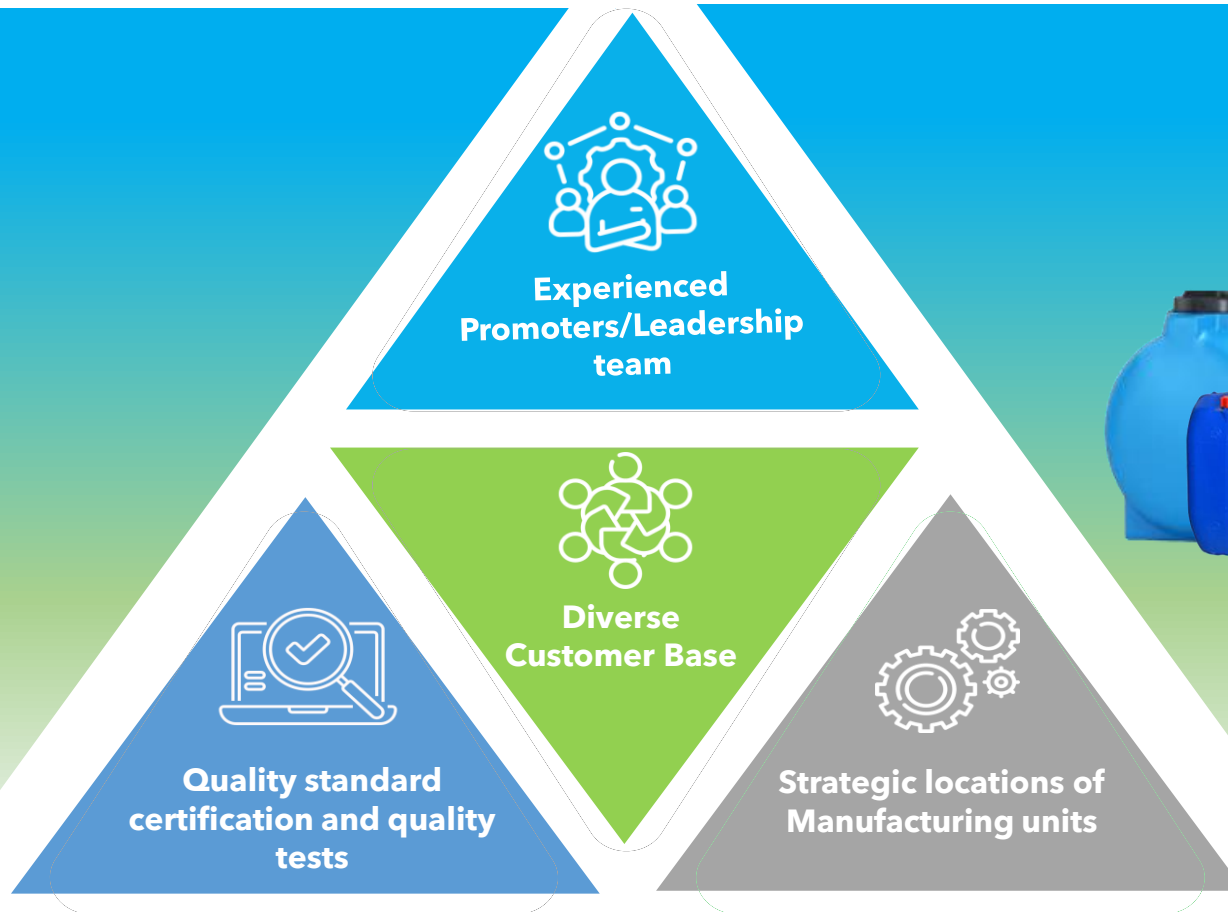
FY23

Revenue - ₹ 480 Cr

EBITDA - ₹ 51.8 Cr

PAT - ₹ 31.8 Cr

Our Key Strengths...

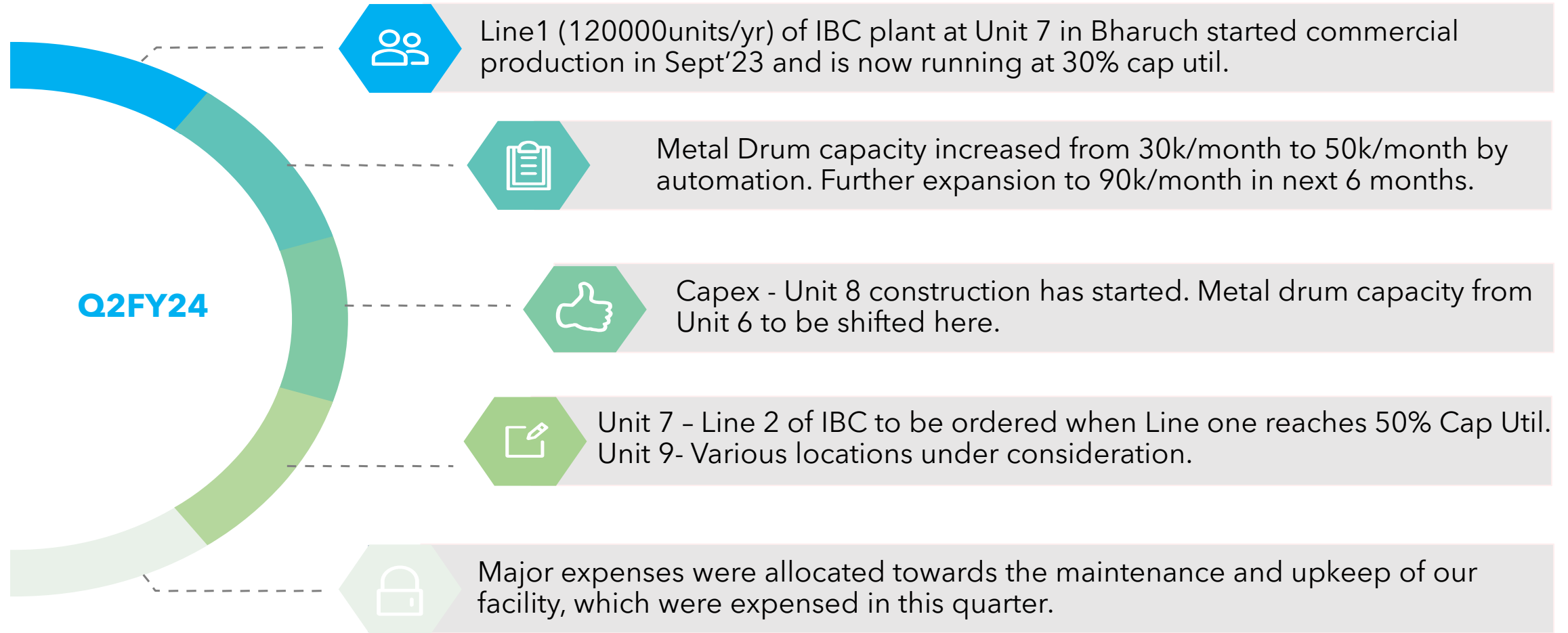


Comprehensive Product portfolio



Offering complete bulk industrial packaging solutions

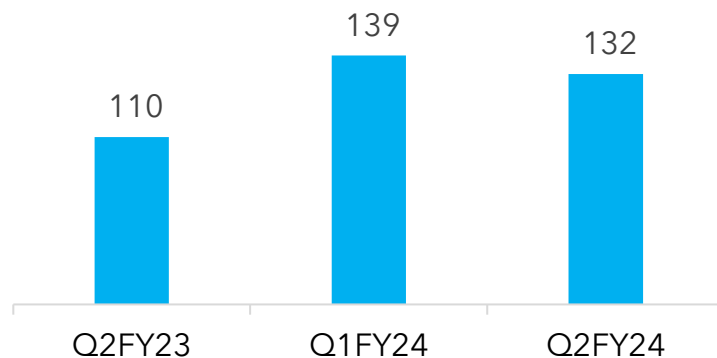
Key Highlights



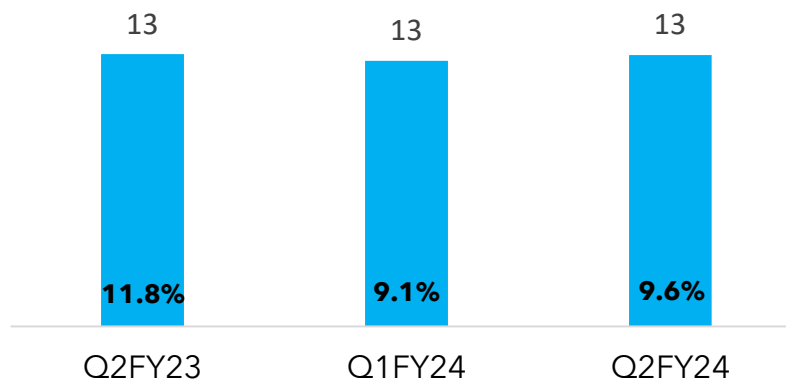
Q2FY24 Performance - Financial Highlights



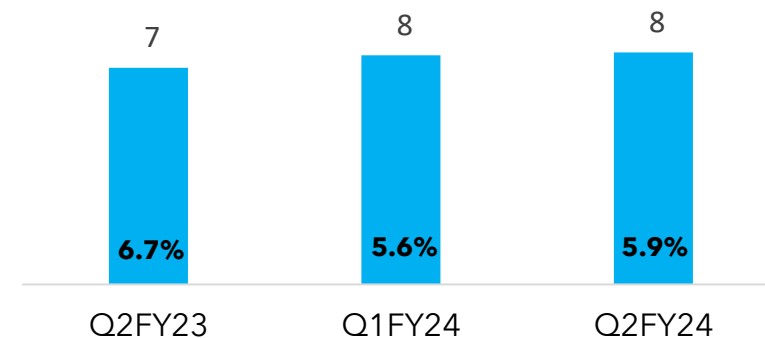
Revenue



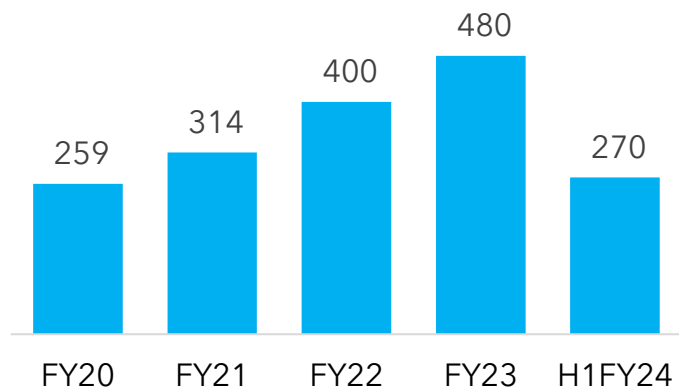
EBITDA and Margins (%)



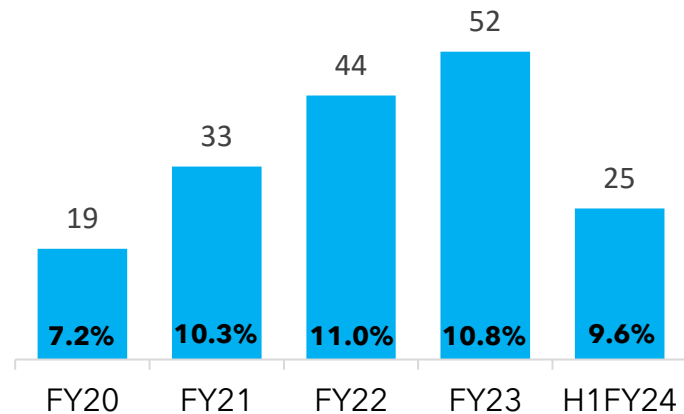
PAT and Margins (%)



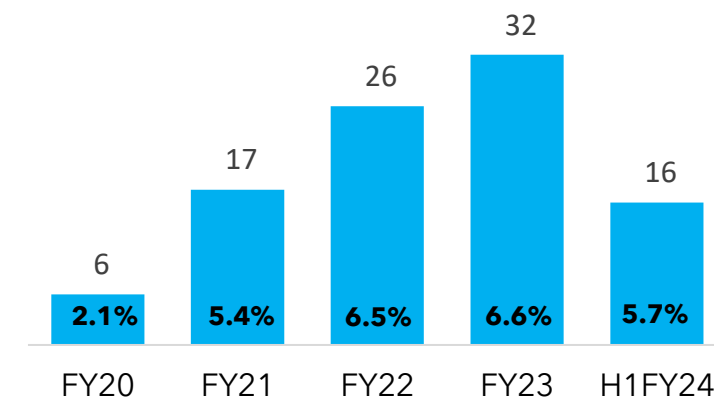
Revenue



EBITDA and Margins (%)

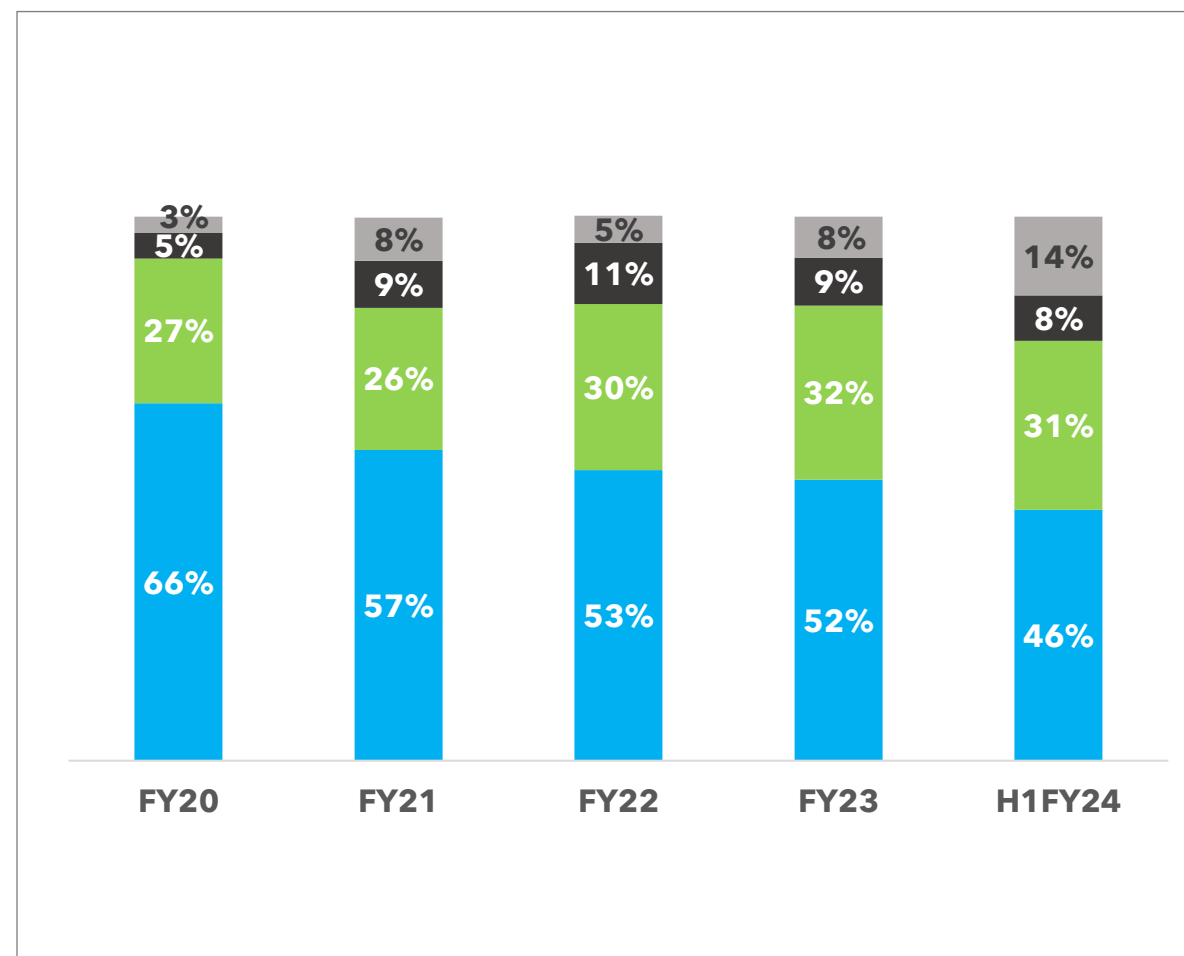
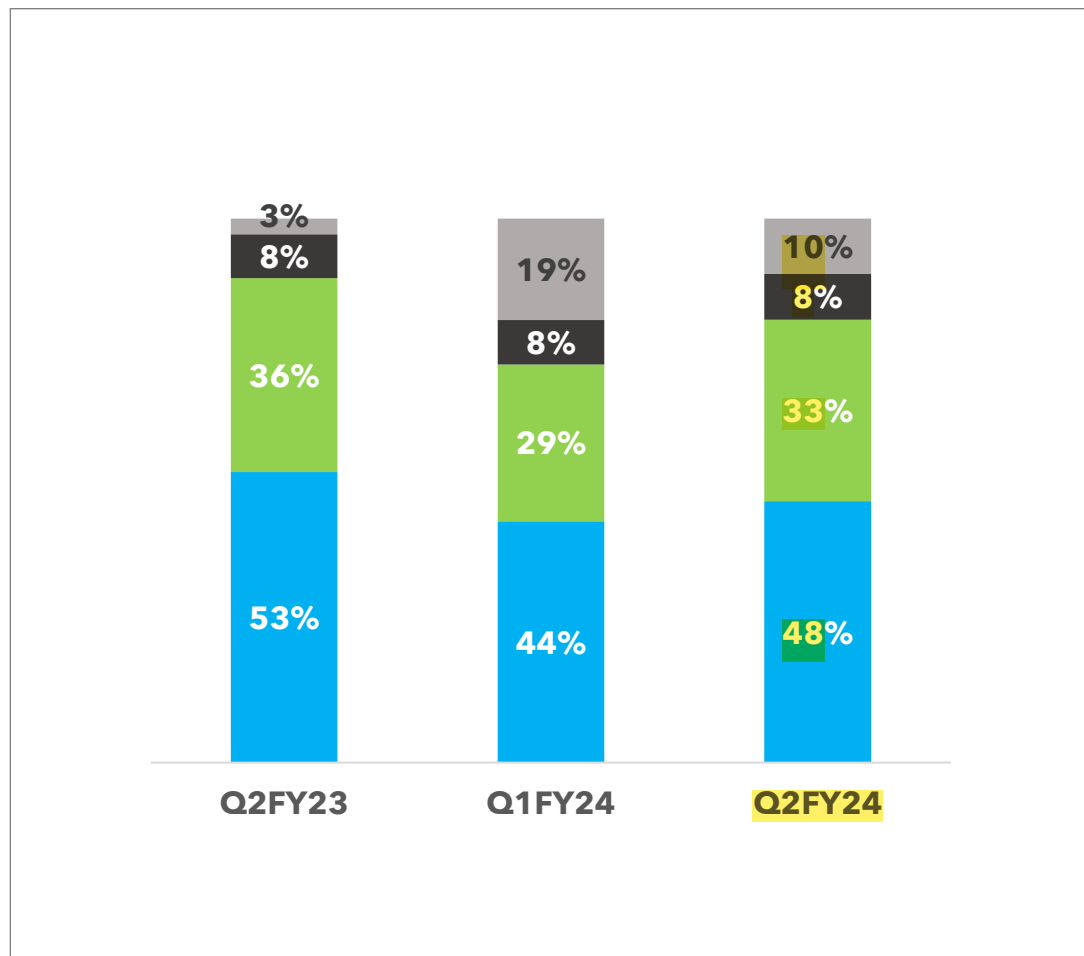


PAT and Margins (%)



All amounts in Rs. Cr

Product Wise Revenue Breakup



■ Polymer Drums
 ■ IBC
 ■ MS Drums
 ■ Others*

*Others includes trading, sale of raw material, scrap and accessories connected to our products.

Operational Performance



| | Value | | | | | Volume | | | | |
|-------------|-------|------|------|------|--------|--------|------|------|------|--------|
| Particulars | UoM | FY21 | FY22 | FY23 | H1FY24 | UoM | FY21 | FY22 | FY23 | H1FY24 |

Turnover

Regular Business:

| | | | | | | | | | | |
|------------------|---------------|------------|------------|------------|------------|-------------|---------------|---------------|---------------|---------------|
| Polymer Drums | Rs. Cr | 179 | 214 | 249 | 125 | MTPA | 15,930 | 16,636 | 16,811 | 9,190 |
| MS Drums | Rs. Cr | 27 | 45 | 44 | 22 | MTPA | 1,717 | 2,359 | 4,726 | 2,546 |
| Sub Total | Rs. Cr | 206 | 259 | 293 | 147 | MTPA | 17,647 | 18,995 | 21,536 | 11,736 |

Value Added

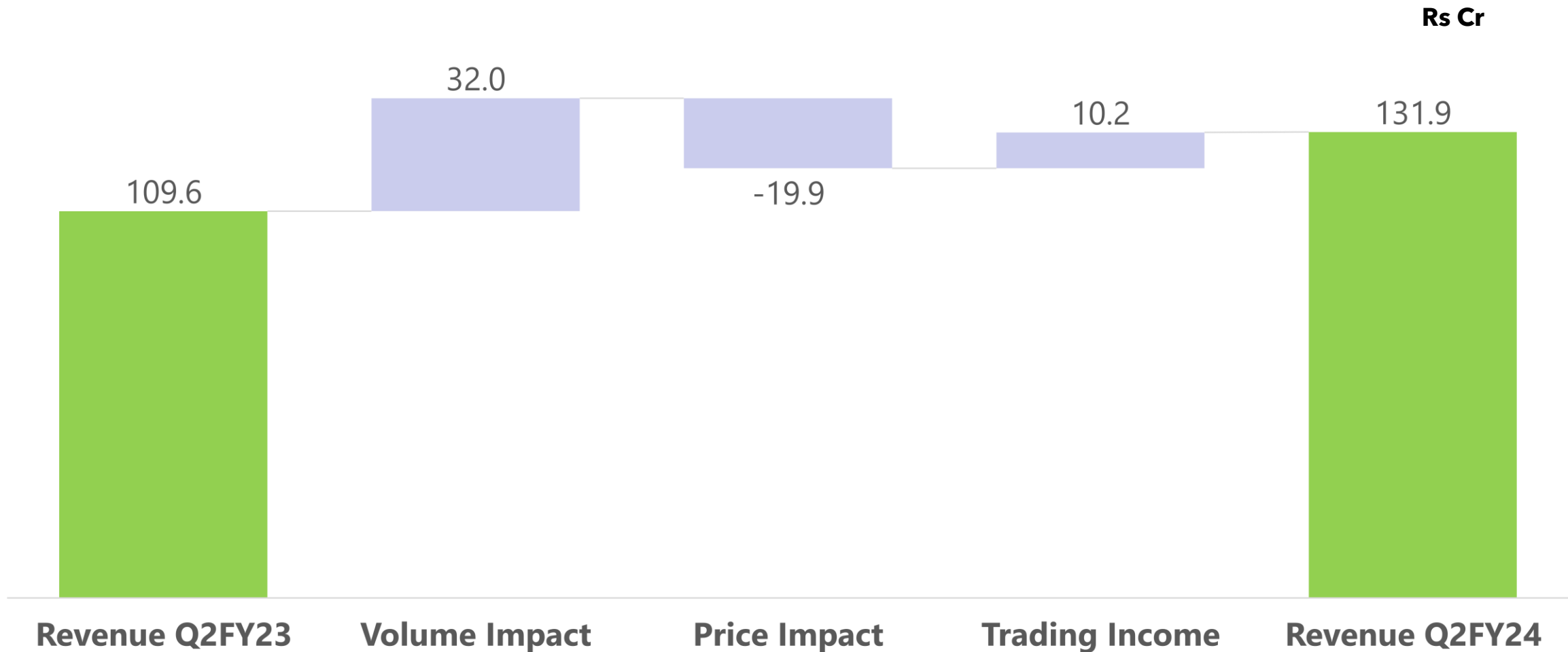
Product:

| | | | | | | | | | | |
|--------------|--------|----|-----|-----|----|-------|----------|----------|----------|--------|
| IBC Business | Rs. Cr | 82 | 122 | 154 | 84 | Units | 1,13,701 | 1,36,448 | 1,66,737 | 99,152 |
|--------------|--------|----|-----|-----|----|-------|----------|----------|----------|--------|

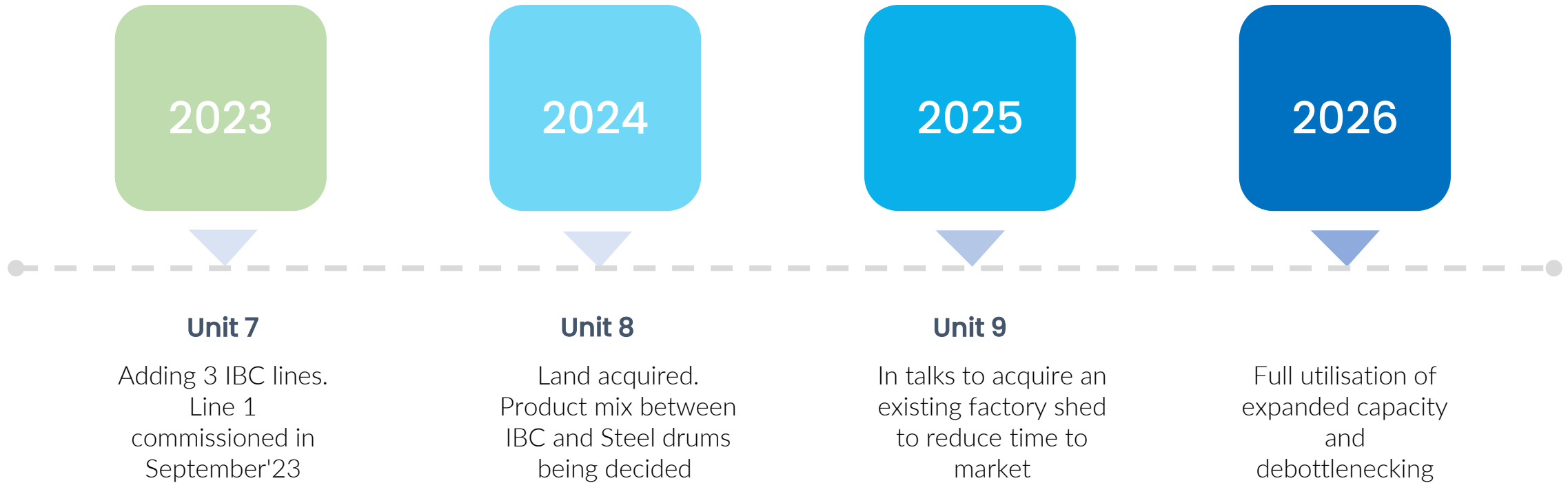
*Others

| | | | | | | | | | | |
|-----------------------------|---------------|--------------|--------------|--------------|--------------|-------------|---------------|---------------|---------------|---------------|
| | Rs. Cr | 25 | 20 | 33 | 39 | | | | | |
| Total | Rs. Cr | 314 | 400 | 480 | 270 | MTPA | 26,448 | 27,950 | 29,843 | 18,008 |
| Capacity Utilization | % | 69.1% | 74.5% | 75.3% | 76.7% | | | | | |

Revenue Bridge: Polymer Price Lag

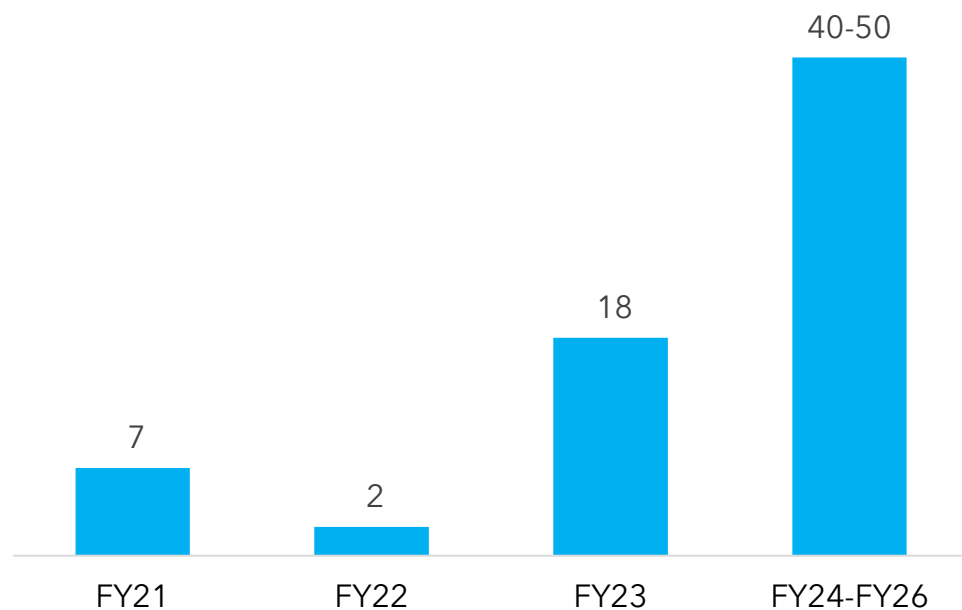


Project Update



Capex Trend and Outlook

Capex* (Rs. Cr)



*for incremental capacity



Strategic Priorities

01 Organic Growth

Capex budget of Rs. 40-50 Cr for FY24-FY26 for proposed Unit 8 and Unit 9. Asset turnover expected of 5x.

02 Balance Sheet Strength

To fund capex from internal accruals and cash balance. To maintain net debt zero balance sheet

03 Strengthening Portfolio

Greater revenue share of high-margin product like IBC. Increasing automation in metal drums production. Optimising production at each site.

Investment Thesis



Strong Macro Tailwind: for specialty chemical companies with China+1 strategy



Focusing on value-added products: such as IBC by expanding existing facilities; **Pyramid has a 40% market share in India**

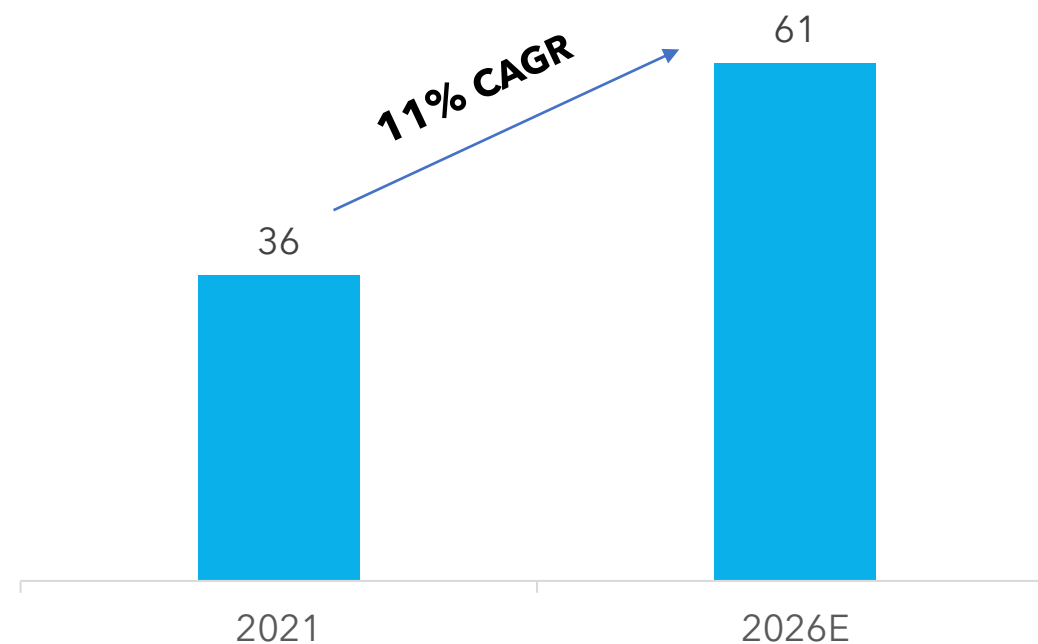


De-risked, sustainable growth with robust order book.



High return ratios: RoE of 29.6% and RoCE of 28.8% in FY23; Focus on efficiency, profitability and on time delivery of products.

India's Specialty Chemical Market (USD b)



Source: EY Report

FINANCIAL OVERVIEW

Q2FY24 Performance - Results



In ₹ Cr

| Particulars | Q2FY24 | Q1FY24 | QoQ | Q2FY23 | YoY |
|--------------------------------------|--------------|--------------|------|--------------|------|
| Net Sales | 131.9 | 138.5 | -5% | 109.6 | 20% |
| Other Income | 1.5 | 1.0 | 52% | 0.3 | 508% |
| Total Income | 133.5 | 139.5 | -4% | 109.8 | 22% |
| Raw Material costs | 99.0 | 109.2 | -9% | 82.1 | 21% |
| Employee Cost | 5.7 | 4.7 | 20% | 4.1 | 38% |
| Other Expenses | 16.4 | 13.0 | 26% | 10.9 | 50% |
| Total Expenditure | 120.6 | 126.9 | -5% | 96.9 | 24% |
| EBIDTA | 12.9 | 12.6 | 2% | 12.9 | 0% |
| EBIDTA(%) | 9.7% | 9.1% | | 11.8% | |
| Interest | 0.7 | 0.9 | -19% | 1.0 | -28% |
| Depreciation | 1.5 | 1.4 | 6% | 1.1 | 30% |
| PBT | 10.6 | 10.3 | 3% | 10.7 | -1% |
| TAX Expense (Including Deferred Tax) | 2.8 | 2.6 | 7% | 3.4 | -18% |
| PAT | 7.8 | 7.8 | 1% | 7.3 | 7% |
| Total Comprehensive Income | 7.9 | 7.8 | 2% | 7.4 | 7% |
| NPM (%) | 5.6% | 5.6% | | 6.7% | |

Profit & Loss Statement



In ₹ Cr

| Particulars | FY20 | FY21 | FY22 | FY23 | H1FY24 |
|--------------------------------------|--------------|--------------|--------------|--------------|--------------|
| Net Sales | 259.3 | 313.5 | 400.4 | 480.0 | 270.4 |
| Other Income | 0.9 | 2.7 | 2.2 | 2.0 | 2.5 |
| Total Income | 260.1 | 316.2 | 402.6 | 482.0 | 273.0 |
| Raw Material costs | 190.9 | 229.8 | 298.7 | 362.9 | 208.2 |
| Employee Cost | 11.8 | 14.8 | 15.7 | 17.6 | 10.4 |
| Other Expenses | 38.9 | 39.1 | 43.8 | 49.8 | 29.4 |
| Total Expenditure | 241.5 | 283.7 | 358.2 | 430.2 | 247.5 |
| EBIDTA | 18.7 | 32.5 | 44.4 | 51.8 | 25.5 |
| EBIDTA(%) | 7.2% | 10.3% | 11.0% | 10.8% | 9.4% |
| Interest | 7.1 | 5.2 | 4.9 | 4.1 | 1.6 |
| Depreciation | 3.7 | 4.4 | 4.4 | 4.9 | 2.9 |
| PBT | 7.9 | 22.9 | 35.2 | 42.8 | 20.9 |
| TAX Expense (Including Deferred Tax) | 2.4 | 5.9 | 9.0 | 11.1 | 5.4 |
| PAT | 5.6 | 17.0 | 26.2 | 31.8 | 15.6 |
| Total Comprehensive Income | 5.4 | 16.9 | 26.4 | 32.1 | 15.7 |
| NPM (%) | 2.1% | 5.4% | 6.5% | 6.6% | 5.8% |

Balance Sheet

In ₹ Cr

| Equities & Liabilities | FY20 | FY21 | FY22 | FY23 | H1FY24 |
|---------------------------------------|---------------|---------------|---------------|---------------|---------------|
| Equity | 3.91 | 3.91 | 3.91 | 31.28 | 36.8 |
| Reserves | 28.03 | 44.94 | 71.29 | 75.97 | 171.3 |
| Net Worth | 31.94 | 48.85 | 75.20 | 107.25 | 208.11 |
| Non-Current Liabilities | | | | | |
| Long-Term Borrowing | 19.06 | 21.58 | 11.30 | 17.53 | 2.42 |
| Lease Liabilities | 1.13 | 0.78 | 0.44 | 0.10 | - |
| Deferred Tax Liabilities | 3.84 | 4.01 | 4.24 | 4.64 | 4.78 |
| Long-Term provision | 1.21 | 1.59 | 1.80 | 1.99 | 2.17 |
| Total Non-Current Liabilities | 25.23 | 27.96 | 17.78 | 24.26 | 9.37 |
| Current Liabilities | | | | | |
| Short-Term Borrowings | 27.37 | 29.72 | 53.47 | 37.81 | 2.77 |
| Lease Liabilities | 0.34 | 0.34 | 0.34 | 0.34 | 0.10 |
| Trade Payables | 35.63 | 41.50 | 31.60 | 49.43 | 56.81 |
| Current Tax Liabilities (Net) | 0.73 | 0.68 | 0.21 | 2.28 | 0.27 |
| Short-Term Provisions | 0.10 | 0.18 | 0.24 | 0.29 | 0.34 |
| Other Current Liabilities | 3.87 | 4.23 | 4.91 | 4.12 | 7.29 |
| Total Current Liabilities | 68.04 | 76.65 | 90.77 | 94.27 | 67.59 |
| Total Equity & Liabilities | 125.20 | 153.46 | 183.76 | 225.78 | 285.07 |

| Assets | FY20 | FY21 | FY22 | FY23 | H1FY24 |
|------------------------------------|---------------|---------------|---------------|---------------|---------------|
| Non-Current Assets | | | | | |
| Fixed Assets | 48.81 | 51.43 | 51.81 | 69.19 | 87.93 |
| Non-Current Investment | 1.09 | 1.05 | 1.01 | 2.88 | 2.86 |
| Other Non-Current Financial Assets | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Deferred Tax Assets | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Other Non-Current Assets | 2.22 | 4.63 | 3.03 | 2.20 | 4.23 |
| Total Non-Current Assets | 52.12 | 57.10 | 55.85 | 74.27 | 95.02 |
| Current Assets | | | | | |
| Inventories | 14.13 | 21.57 | 37.45 | 45.50 | 54.00 |
| Trade Receivables | 49.02 | 64.36 | 75.11 | 76.97 | 88.95 |
| Cash & Bank Balance | 2.42 | 4.58 | 3.50 | 5.79 | 27.67 |
| Other Current Financial Assets | 0.12 | 0.15 | 0.46 | 0.42 | 0.52 |
| Current Tax Assets (Net) | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Other Current Assets | 7.39 | 5.70 | 11.39 | 22.84 | 18.84 |
| Total Current Assets | 73.08 | 96.35 | 127.90 | 151.51 | 189.98 |
| Total Assets | 125.20 | 153.46 | 183.76 | 225.78 | 285.07 |

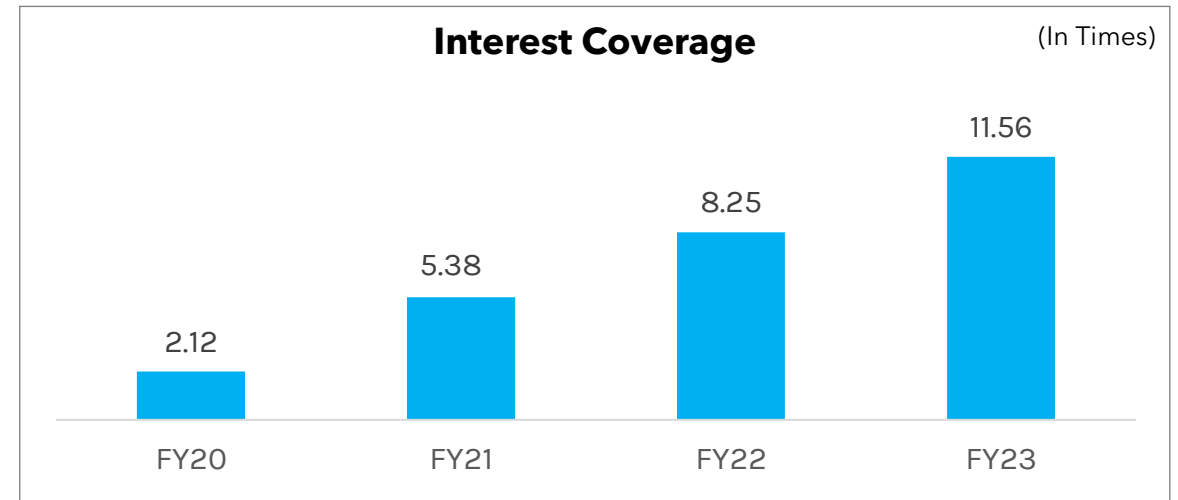
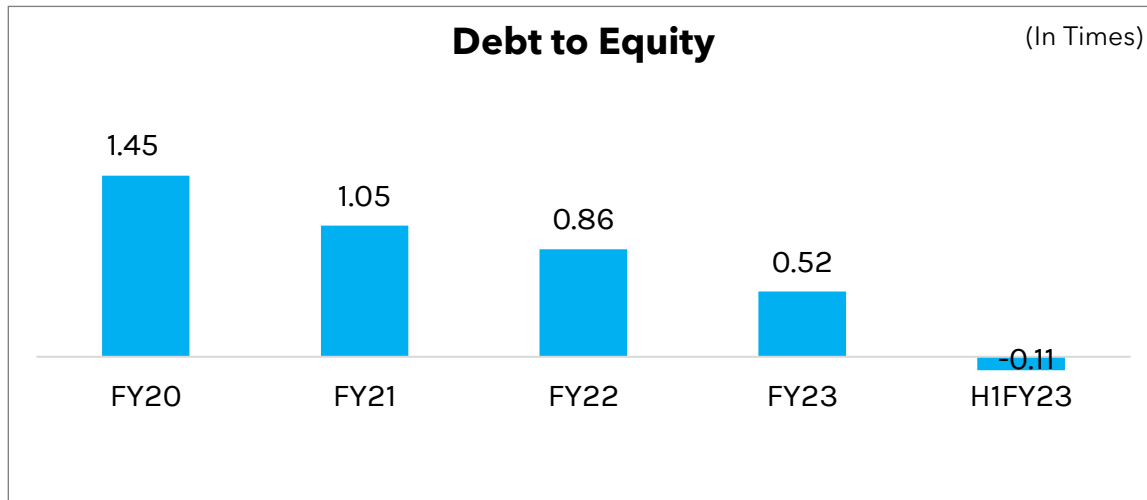
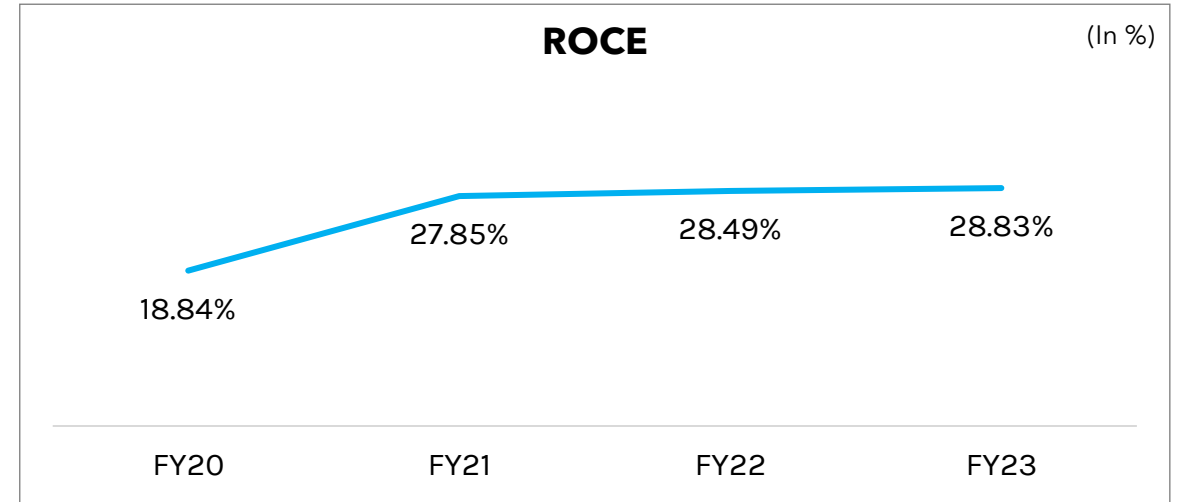
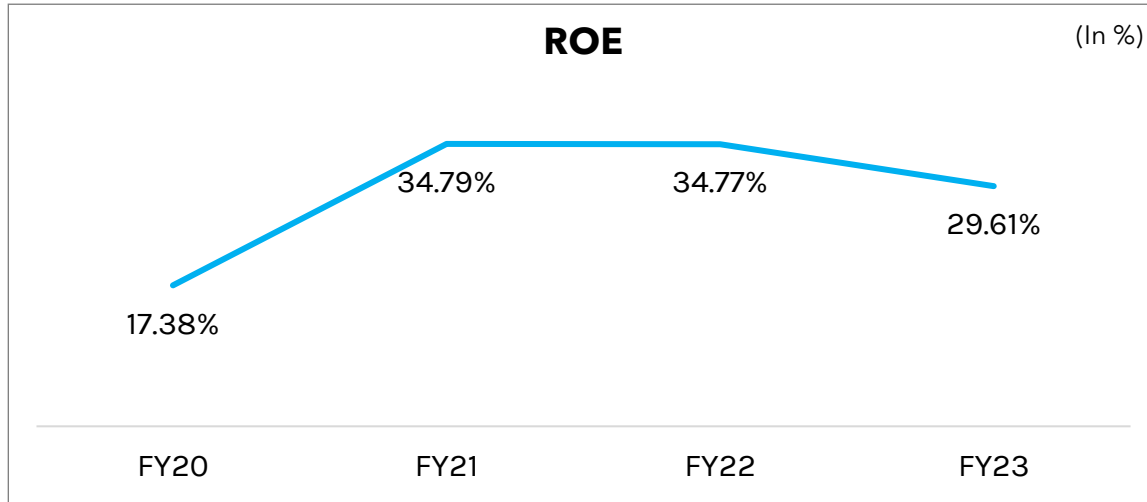
Cashflow Highlights



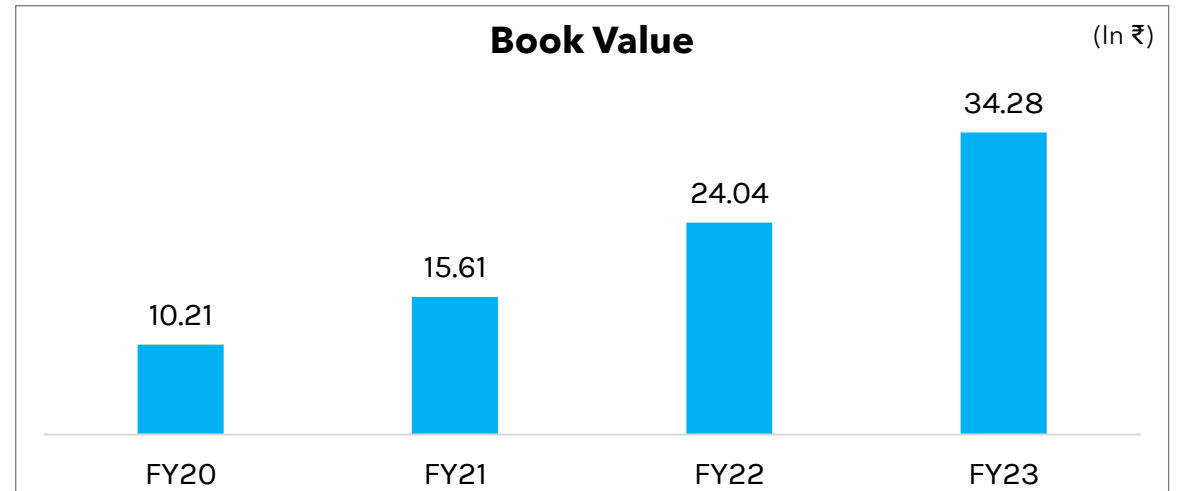
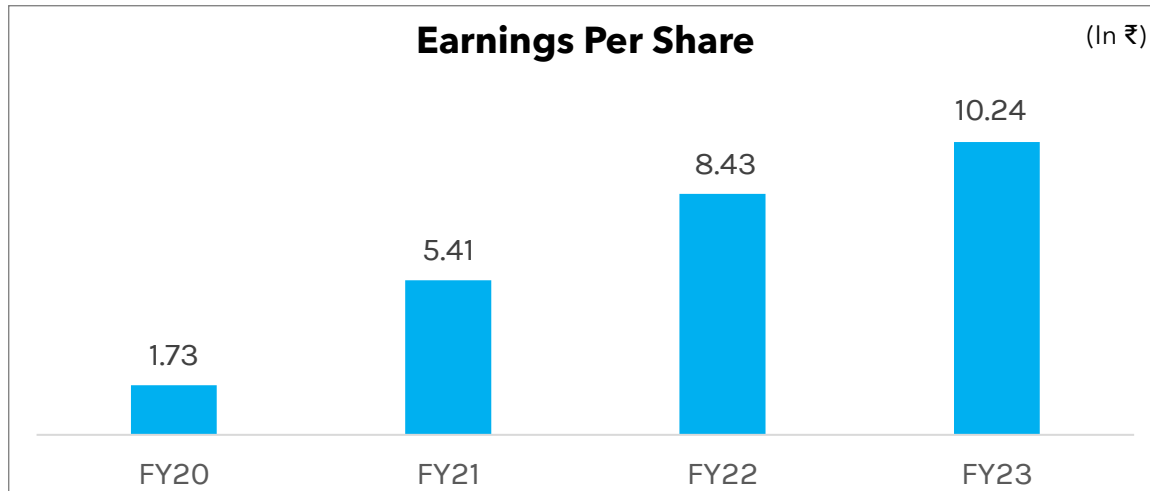
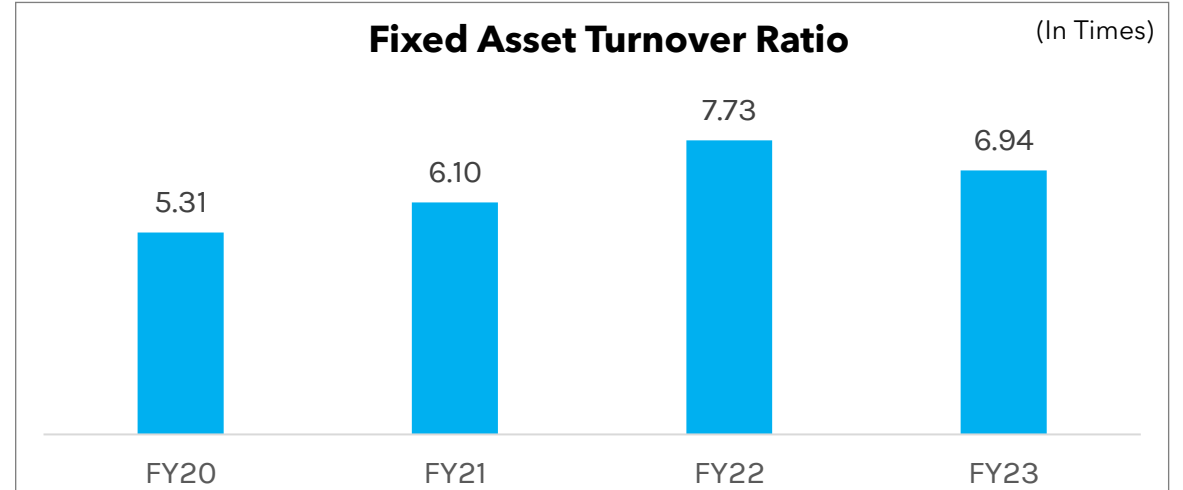
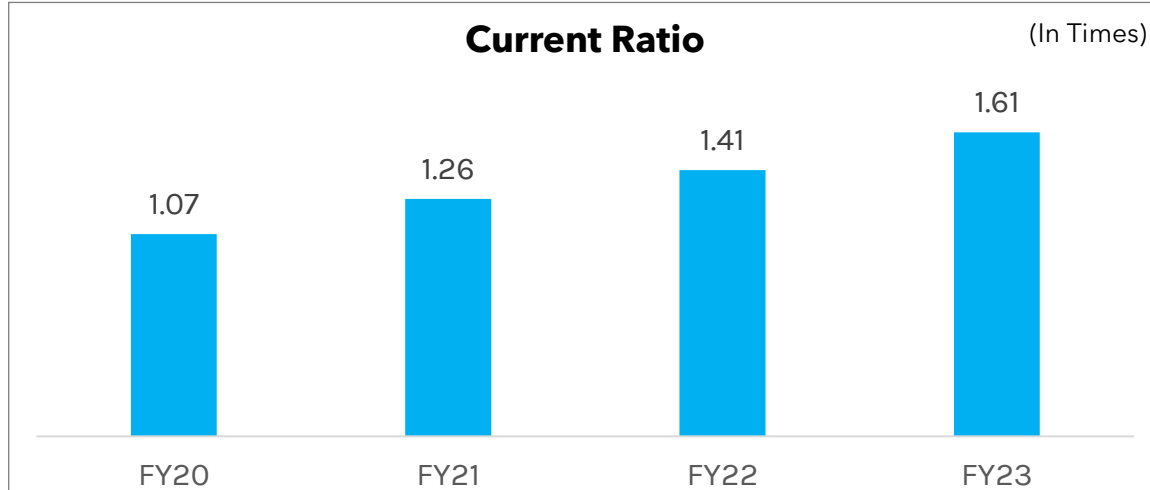
In ₹ Cr

| Particular | FY20 | FY21 | FY22 | FY23 | H1FY24 |
|----------------------------------|--------------|--------------|--------------|---------------|---------------|
| Cashflow from Operations | 12.42 | 8.39 | -6.04 | 38.95 | 15.75 |
| Cashflow from Investments | -6.88 | -6.73 | -4.28 | -23.92 | -27.56 |
| Cashflow from Financing | -5.85 | 0.50 | 9.23 | -12.74 | 33.68 |
| Net Cash Flow | -0.31 | 2.16 | -1.09 | 2.30 | 21.87 |
| Opening Cash Balance | 2.73 | 2.42 | 4.58 | 3.50 | 5.79 |
| Closing Cash Balance | 2.42 | 4.58 | 3.50 | 5.79 | 27.67 |

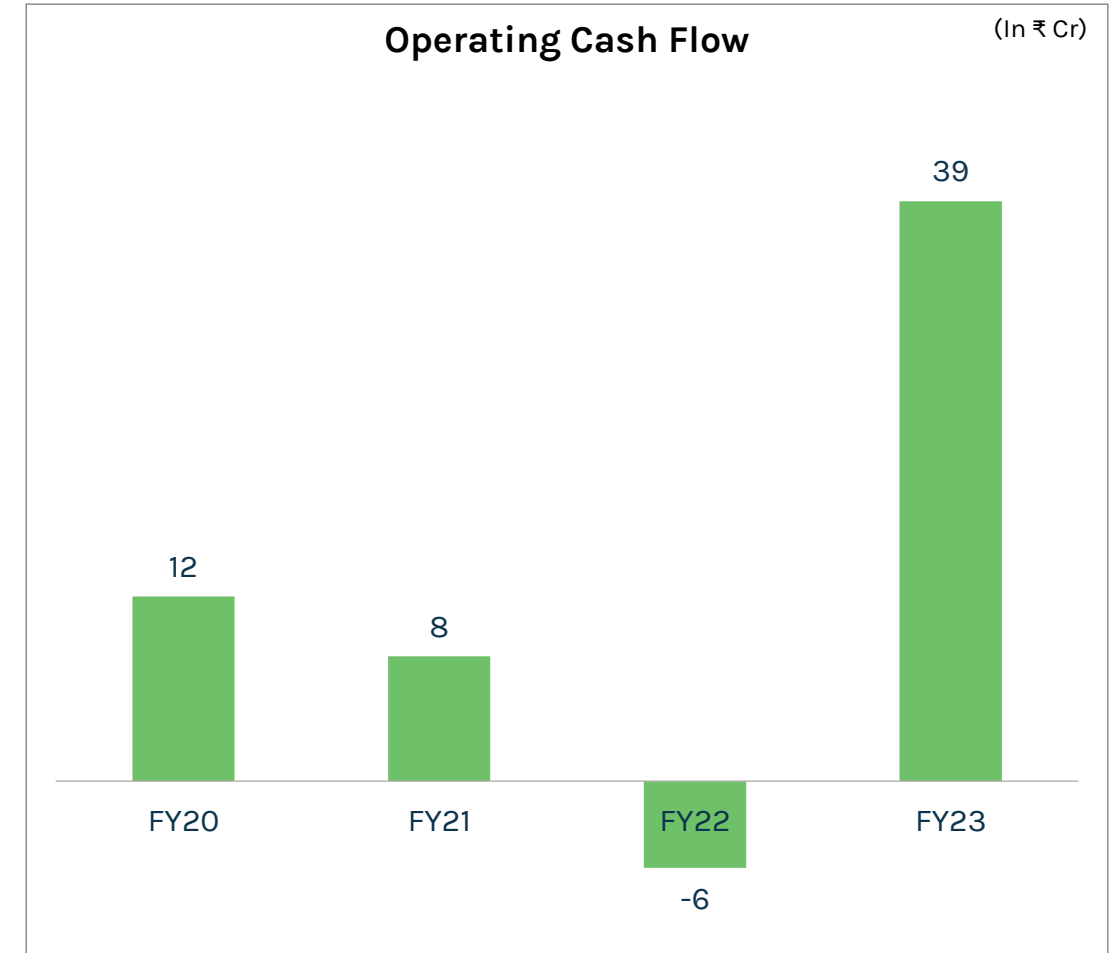
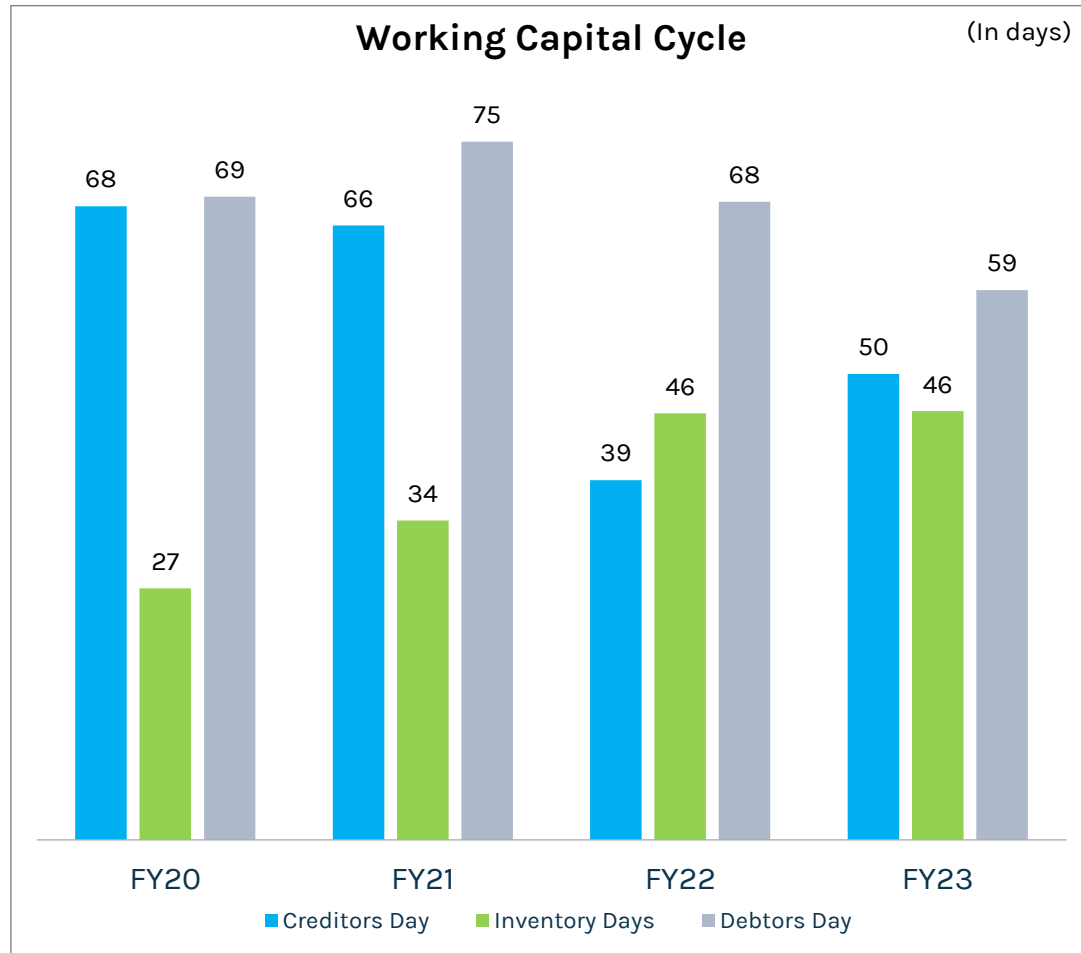
Key Ratios



Key Ratios

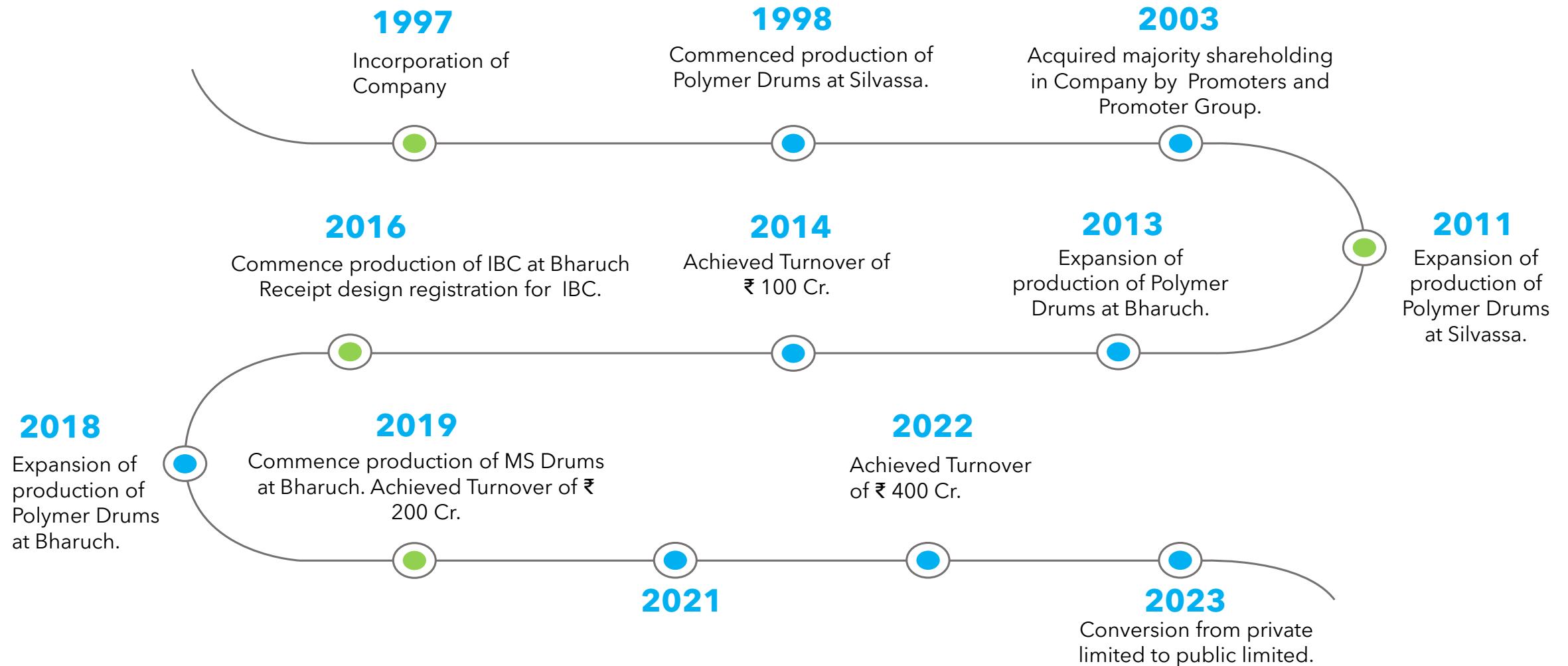


Key Ratios



ANNEXURE

Pyramid Technoplast: Our Journey



Board Of Directors

Experience in packaging industry over 3 decades.

Looks after Finance, Raw material Procurement, Customer Servicing and Business Development.



Mr. Bijaykumar Agarwal
Managing Director & Chairman



Mr. Jaiprakash Agarwal
Whole Time Director & CFO

B.com Graduate from Mumbai University and Masters from ICAI University, Dehradun.

More than 19 years of experience in the packaging Industry. Look after Manufacturing, Finance, Accounts, Sales & Marketing and Business Development.



Mrs. Madhu Agarwal
Whole Time Director

Holds a Bachelor's degree of commerce from Calcutta University

Over sixteen (16) years of experience in Human Resource, Compliance and Administration.

Holds a Bachelor's degree in science from CSJM University, Kanpur and a member of ICAI.

Over ten (10) years of experience in advisory in financial management, direct and indirect tax services.



Mrs. Vandana Agarwal
Independent Director

Holds a Bachelor's degree in commerce from Mumbai University & Law Graduate from Mumbai University.

Over eleven (11) years of experience in legal practice and advisory.



Mr. Sunil Yadav
Independent Director



Mr. Venugopal Rao Kudipudi
Independent Director

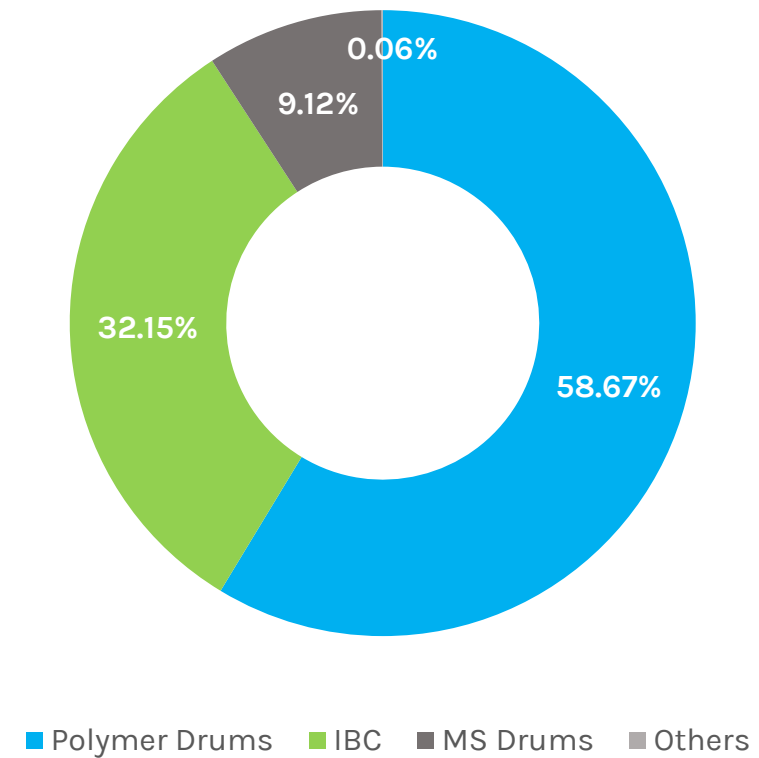
Holds a Bachelor's degree in commerce from Shivaji University, Kolhapur. Bachelor's degree in law and also the member of ICSI.

Over nine (9) years of experience in corporate law advisory and Company secretarial compliances.

Delivering Packaging Excellence: Our Product Portfolio



FY23 Revenue Breakup



IBC Containers: Streamlining Logistics and Enhancing Efficiency

- Pyramid Technoplast is a leading manufacturer of rigid Intermediate Bulk Containers (IBCs), specializing in the production of 1000-liter capacity IBCs.
- With a strong focus on organization, mobility, and integration capabilities, our IBC containers offer numerous benefits.
- They significantly enhance logistic and handling timelines, improve efficiencies, and increase capacity by enabling the filling, moving, loading, transit, and dispensing of materials in a single container.
- IBCs provide a reliable and consistent solution for the safe handling and storage of various substances, offering convenience to the customers.



Steel Pallet IBC

**L-1,200MM
W- 1,000MM
H- 1,153 MM
Capacity- 1,000L**



Composite Pallet IBC

**L-1,200MM
W- 1,000MM
H- 1,153 MM
Capacity- 1,000L**



Wooden Pallet IBC

**L-1,200MM
W- 1,000MM
H- 1,175 MM
Capacity- 1,000L**



Plastic Pallet IBC

**L- 1,200MM
W- 1,000MM
H- 1,173 MM
Capacity- 1,000L**

Plastic Barrels: Versatile Solutions For Industrial Packaging

- Pyramid Technoplast is engaged in the manufacturing of all types of plastic barrels, containers, and HDPE drums that are widely used for industrial and commercial applications. Their plastic drums and containers are supplied to chemical, agrochemical, specialty chemical and pharmaceutical companies.
- The Company manufactures drums with capacities ranging from 20 LTR to 250 LTR and even higher according to the clients' specifications
- Key Features of Plastic Barrel: Easy to handle, Tamper proof design, Leak proof, Easy to fill, Easy to transport, Easy to unload.



Full Open Top Drums

Height : 530 mm
Diameter : 330 mm
Mouth : 250 mm
Weight : 1.8 kgs



Narrow Mouth Drums

Height : 560mm
Diameter : 385 mm
Mouth : 50 mm & 25 mm
Weight : 2.5 kgs



Wide Mouth Drums

Height: 740 mm
Diameter: 485 mm
Opening: 8" And 10"
Weight: 5 kgs



Jerry Cans

Height : 470 mm
Width : 290 mm
Length : 325 mm
Mouth : 45 mm
Weight : 1.8 kgs

MS Drums: Meeting Diverse Packaging Needs



- Pyramid Technoplast serves as a one-stop shop for all your packaging needs, offering a wide range of drum options such as General-Purpose Metal drums, Epoxy Coated/Lacquered drums, Composite drums, Galvanized drums, and Open top drums.
- The Company's IBCs and MS Drums have received UN certification, meeting the safety levels outlined by the United Nations Recommendations and conforming to the quality standards of IS 1783:2014.
- MS Drums are capable of storing and transporting both liquid and solid raw/finished goods of 18 gauge to 20 gauges with storage capacity of 200 L to 210 L.
- With the diverse selection, customers can find the perfect drum solution for their specific requirements, including various shapes, sizes, & dimensions.



Close Mouth Barrel

Height - 883 + 3mm
Diameter - 584 mm (max)
Opening - 50mm & 20mm



Composite Barrel

Height - 890+ 3mm
Diameter - 584 mm (max)
Opening- 2 openings of 50mm



W-Bead GI

Height - 883 + 3mm
Diameter - 584 mm (max)
Opening - 50mm & 20mm



Goose neck Epoxy Coated Barrels

Outer Diameter - 563mm
Outer Height - 891mm
Inner Diameter - 559mm

State Of The Art Manufacturing Facilities: Powering Innovation & Production Excellence

Unit 1



Located in Silvassa.
Installed capacity 5,180 MTPA.
Area 4,018 Sq. M.

Unit 2



Located in Silvassa.
Installed capacity 3,282 MTPA.
Area 1,750 Sq. M.

Unit 3



Located in Vilayat Vagra GIDC Bharuch.
Installed capacity 6,694. MTPA.
Area 4,447.80 Sq. M.

Unit 4



Located in Vilayat Vagra GIDC Bharuch
Installed capacity 5,322 MTPA.
Area 4,447.80 Sq. M.

Unit 5



Located in Vilayat Vagra GIDC Bharuch
Installed capacity 3,240 MTPA.
Area 7,133.92 Sq. M.

Unit 6



Located in Vilayat Vagra GIDC Bharuch
Installed capacity 3,600 MTPA.
Area 4,447.80 Sq. M.

Unit 7



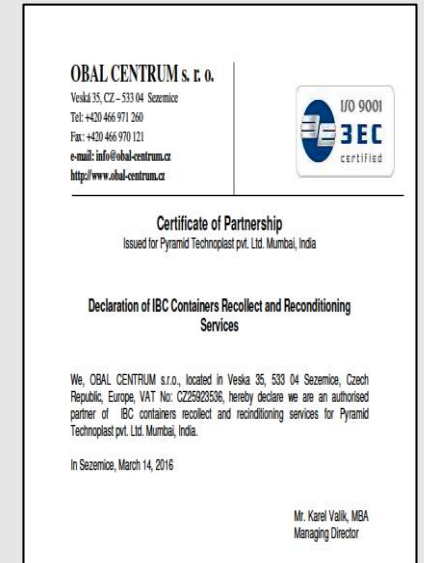
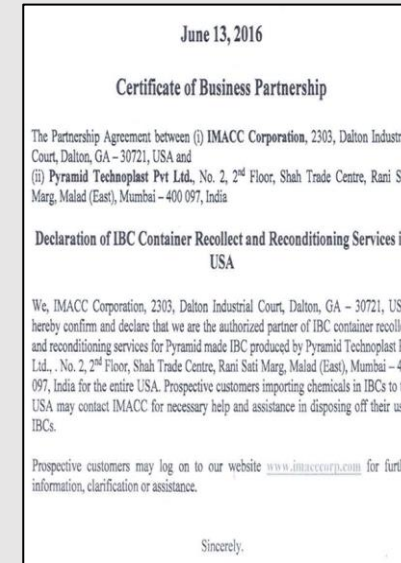
Located in Vilayat Vagra GIDC Bharuch
Installed capacity 120,000 Units
Area 10817.31 Sq. M.

Precision, Quality, Innovation: Empowering Manufacturing Excellence with Advanced Technologies



- Fully automated machines with advanced blow molding technologies are utilized in the manufacturing process.
- National and international standard molds and dyes are used to ensure high-quality production.
- Air Dryers to eliminate the moisture in the plastic material before processing it.
- Injection Molding Machine that facilitates manufacturing of a wide range of products.

Certifications: Recognitions Of Quality & Global Compliance



Quality Certification Approved and certified by IIP Govt of India Organization-UN Approved IBCs

International TUV Certification of IBC From TUV Singapore

International TUV Certification of IBC From TUV Singapore

Pyramid Technoplast IBC - Collection Service in USA

Pyramid Technoplast IBC - Collection Service in Europe



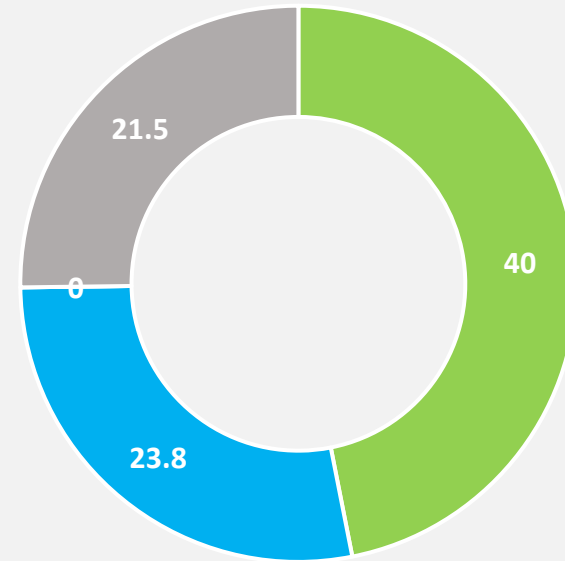
www.ecovadis.com



Utilization of Net Issue Proceeds

Utilization of Net Issue Proceeds (Rs. Cr)

| | |
|--|------|
| ■ Repayment/ Prepayment of Certain Outstanding Borrowing | 47 % |
| ■ Funding Working Capital Requirements | 28 % |
| ■ General Corporate Purpose | 0 % |
| ■ Unutilized as on Sep'23 | 25 % |



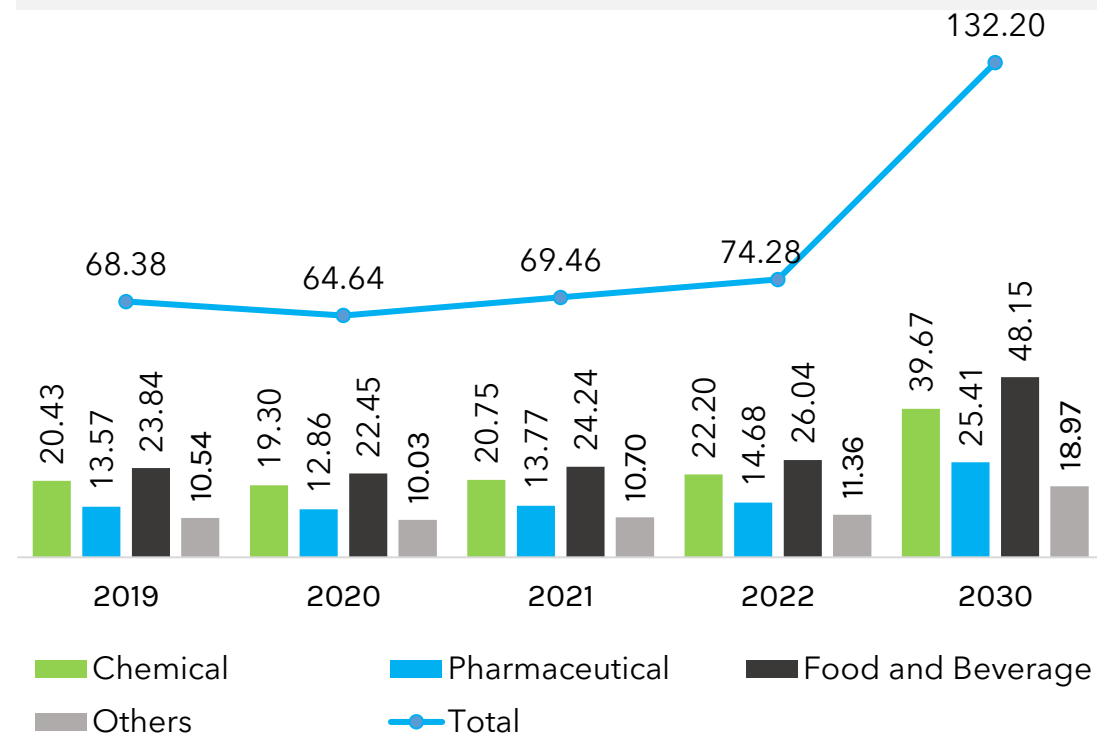
INDUSTRY OVERVIEW

Growing Demand for IBCs in India

India's Intermediate Bulk Container (IBC) market revenue is expected to grow at a CAGR of 10.56% from ₹ 4,001,261.80 lakhs in FY22 to ₹ 8,931,901.94 lakhs in FY30

- Rapid IBC demand growth is expected in India's end-use industries like chemical, pharmaceutical, and Food and beverage, fueled by efficiency, safety, and space optimization.
- India ranks fourth globally in agrochemical and specialty chemical production. This industry's growth along with export/import activities is further driving IBC demand for chemicals' transportation.
- The Indian chemicals market is projected to experience substantial growth with a forecasted CAGR of 9.3% from 2019 to 2025, contributing significantly to GDP growth.
- Government initiatives foster domestic production, attract investments, and ensure quality standards in the chemical sector.

India Intermediate Bulk Container Market Volume Estimates And Forecasts, By End Use, 2019-2030 (Mn Units)

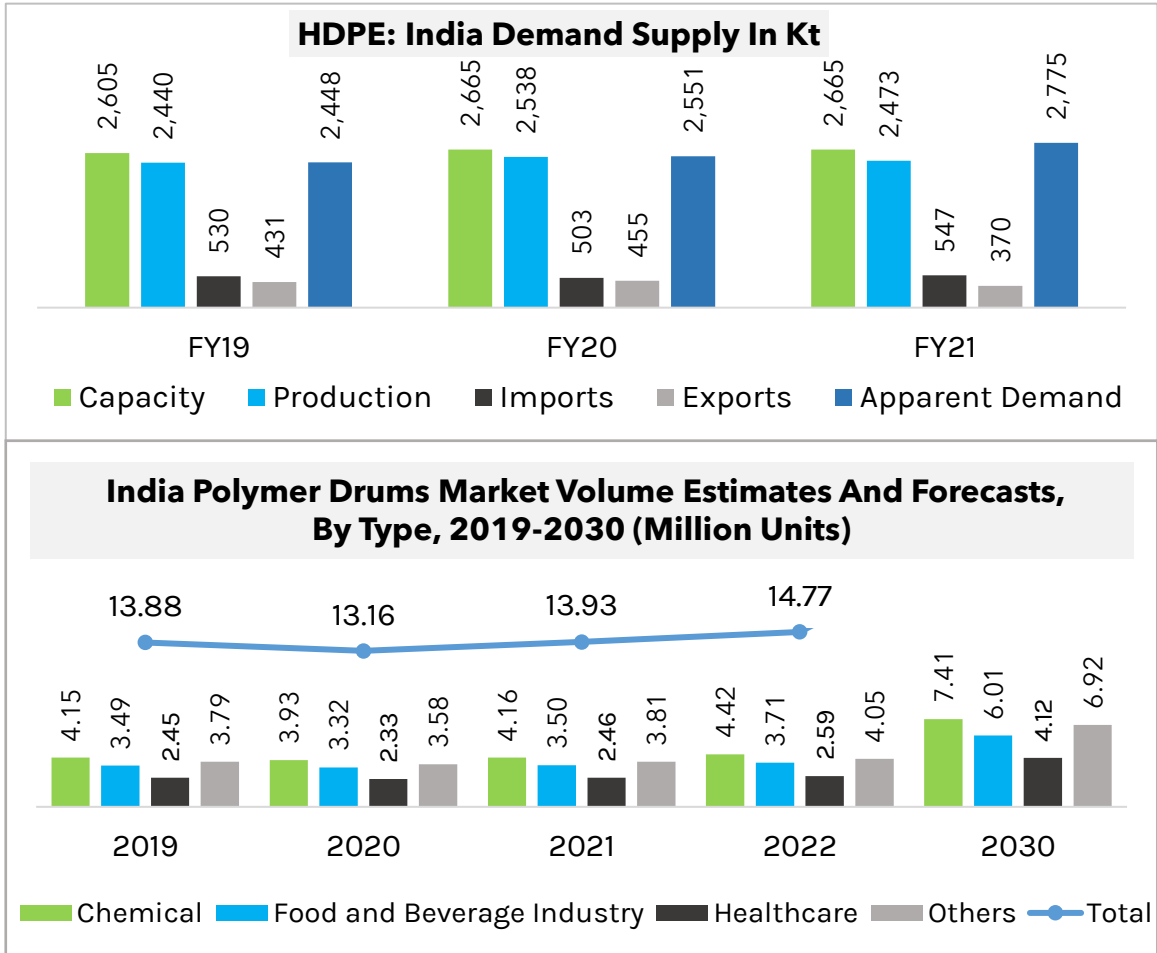


Source: India Plastics Manufacturers' Association (AIPMA), Indian Plastics Federation, Packaging Industry Association of India, Plastics Trade Association, IPMMI, PIAI, PMMAI Company Annual Report, Primary Interviews, Reports and Data.

The Rise of Polymer Drums in Industrial Applications

India's polymer drums market revenue is expected to grow at a CAGR of 9.87% from ₹ 127,584.77 lakhs in FY22 to ₹ 270,937.39 lakhs in FY30.

- High-density polyethylene (HDPE) usage for polymer drums is rising due to growing demand and the impact of plastic bans on certain polyethylene grades in India.
- Polymer drums are essential for storing and transporting various commodities such as chemicals, pharmaceuticals, and food products
- Despite COVID-19 disruptions, sectors like agriculture and pharmaceuticals display growth, while urbanization boosts food industry, creating opportunities for food grade polymer drums.
- Polymer drums are eco-friendly and recyclable, minimizing environmental impact and reducing carbon emissions. HDPE offers superior properties such as resistance to high and low pH contents, high tensile strength, and UV protection, making it ideal for polymer drum manufacturing.

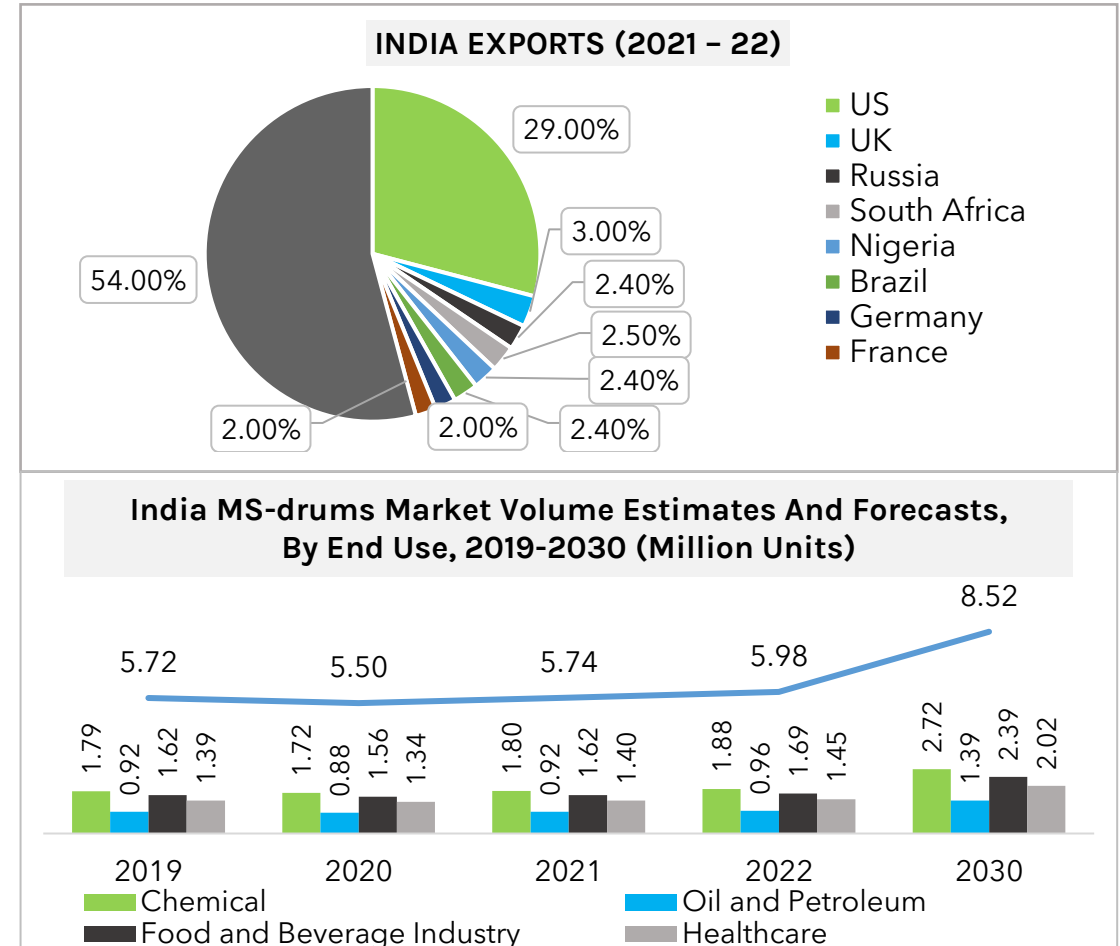


Source: CPMA; Source: India Plastics Manufacturers' Association (AIPMA), Indian Plastics Federation, Packaging Industry Association of India, Plastics Trade Association, IPMMI, PIAI, PMMAI Company Annual Report, Primary Interviews, Reports and Data

Industrial Demand Drives Mild Steel Drum Sales

India's MS-Drums market revenue is expected to grow at a CAGR of 9.14% from ₹ 280714.74 lakhs in FY22 to ₹ 517794.61 lakhs in FY30

- MS drums serve as a versatile packaging option, providing safe and secure storage for various sectors such as pesticides, fuels, medicines, fragrances, food, resins, lubricants, coatings, chemicals, and metallurgy.
- With advantages including cost-effectiveness, reusability, and fire resistance, the expanding demand for MS drums in India presents growth opportunities for manufacturers and suppliers.
- Increasing focus on sustainability and recycling due to rising material costs contributes to environmental conservation in the MS drums industry.



Source: India Plastics Manufacturers' Association (AIPMA), Indian Plastics Federation, Packaging Industry Association of India, Plastics Trade Association, IPMMI, PIAI, PMMAI Company Annual Report, Primary Interviews, Reports and Data



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Thank You