



CREATING VALUE FOR A
BRIGHTER FUTURE



INVESTOR AND ANALYST MEET

June 7, 2012

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AGENDA

- Company Overview
- Investment Rationale
- Godrej Agrovet Deep Dive
- Q&A

COMPANY OVERVIEW

COMPANY OVERVIEW

Part of Godrej Group

- Established in 1897
- US \$ 3.9 billion in revenues
- 25,000 employees
- Among India's most trusted conglomerates

Diversified business model

- Leveraging the “India growth story” through presence in multiple high growth industries
- Portfolio of high quality products that successfully cater to growing aspirations of all consumers
 - Urban & Rural, Domestic & Global
- Diversified businesses provides a hedge against adverse developments in particular industry

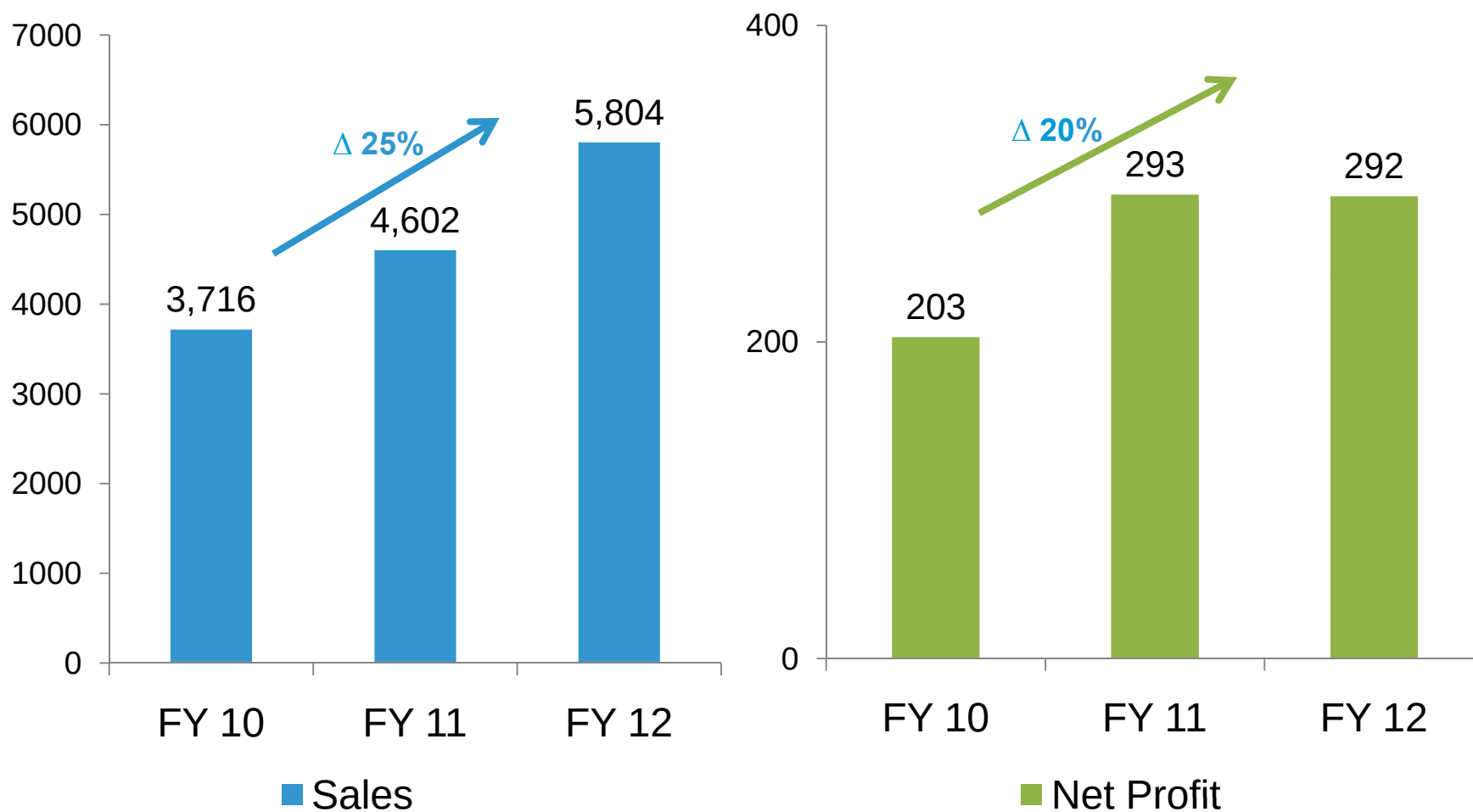
Experienced management team

- Sound qualifications along with strong entrepreneurial orientation
- Tremendous results track record

BALANCED PORTFOLIO OF GROWTH BUSINESSES

	BUSINESS SEGMENTS	FINANCIAL PERFORMANCE
CHEMICALS (own business)	- Fatty alcohols, fatty acids, glycerin & surfactants - Key ingredients for personal care, home care & specialized consumer products	Revenue growth in FY 12: 25% PBIT growth FY 12: 33%
GODREJ AGROVET (75.2%)	- Animal Feeds - cattle, layer, poultry & aqua feeds - Oil Palm plantations, genetic seeds & Agro-chemicals - Poultry & processed meats	Revenue growth in FY 12: 28% PBIT growth FY 12: 73%
GODREJ PROPERTIES (61.5%)	- Townships, Residential & Commercial projects - Presence in 12 cities across India 77 million sq ft of development area	Sales and Operating Income growth in FY 12 : 71% Profit from operations growth FY 12 : 52%
VIKHROLI PROPERTY DEVELOPMENT (40%)	3.5 Mn sq ft to be developed in prime Mumbai suburb - Mixed use development with best-in-class design and sustainable green buildings	
FMCG (GCPL – 21.2%) (GHL – 43.4%)	- Home care, Personal Care , Foods & beverages - Leadership in Insecticides & Hair color segment - Dominant presence in Soaps & confectionary - Significant increase in scale of international operations	GCPL – Revenue growth in FY 12 : 32% Net profit growth in FY 12 : 41%

FINANCIAL PERFORMANCE: GIL CONSOLIDATED



Note: Values in ₹ Crore

FINANCIAL PERFORMANCE: GIL STANDALONE

	FY 2011-12	FY 2010-11	% Increase
Total Income	1563	1255	25%
PBT	201	135	48%
Net Profit	202	133	51%
EPS	6.33	4.20	51%
Debt- Equity Ratio	0.40	0.49	

Note: Values in ₹ Crore

INVESTMENT RATIONALE

INVESTMENT RATIONALE



brand advantage

systematic **value creation** approach

Proven **track record** of value creation

strong value of **underlying assets**

POWERFUL BRAND

One of the most well known **brands** built around trust and reliability



500 million consumers use at least one Godrej product everyday

\$2.86 billion brand valuation determined by global brand consulting
agency *Interbrand*

LEADING MARKET POSITIONS

#1

Oleo-chemicals & Surfactants

Animal feeds

Oil Palm plantations

Hair color

Household insecticides

Liquid detergents

Soya milk

Processed Chicken

#2

Soaps

#3

Sugar confectionery

INVESTMENT RATIONALE

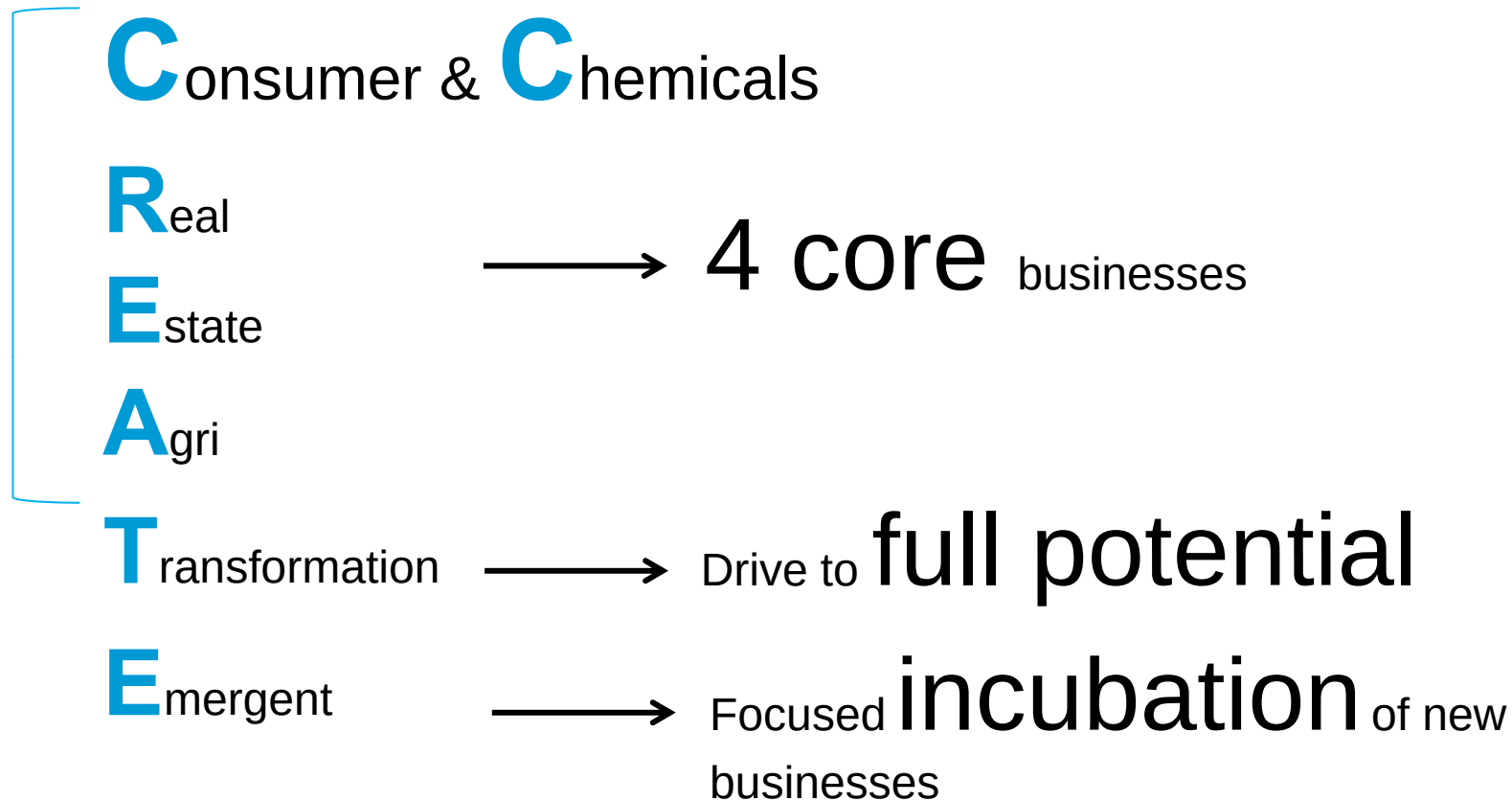
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OUR “CREATE” GROUP PORTFOLIO APPROACH

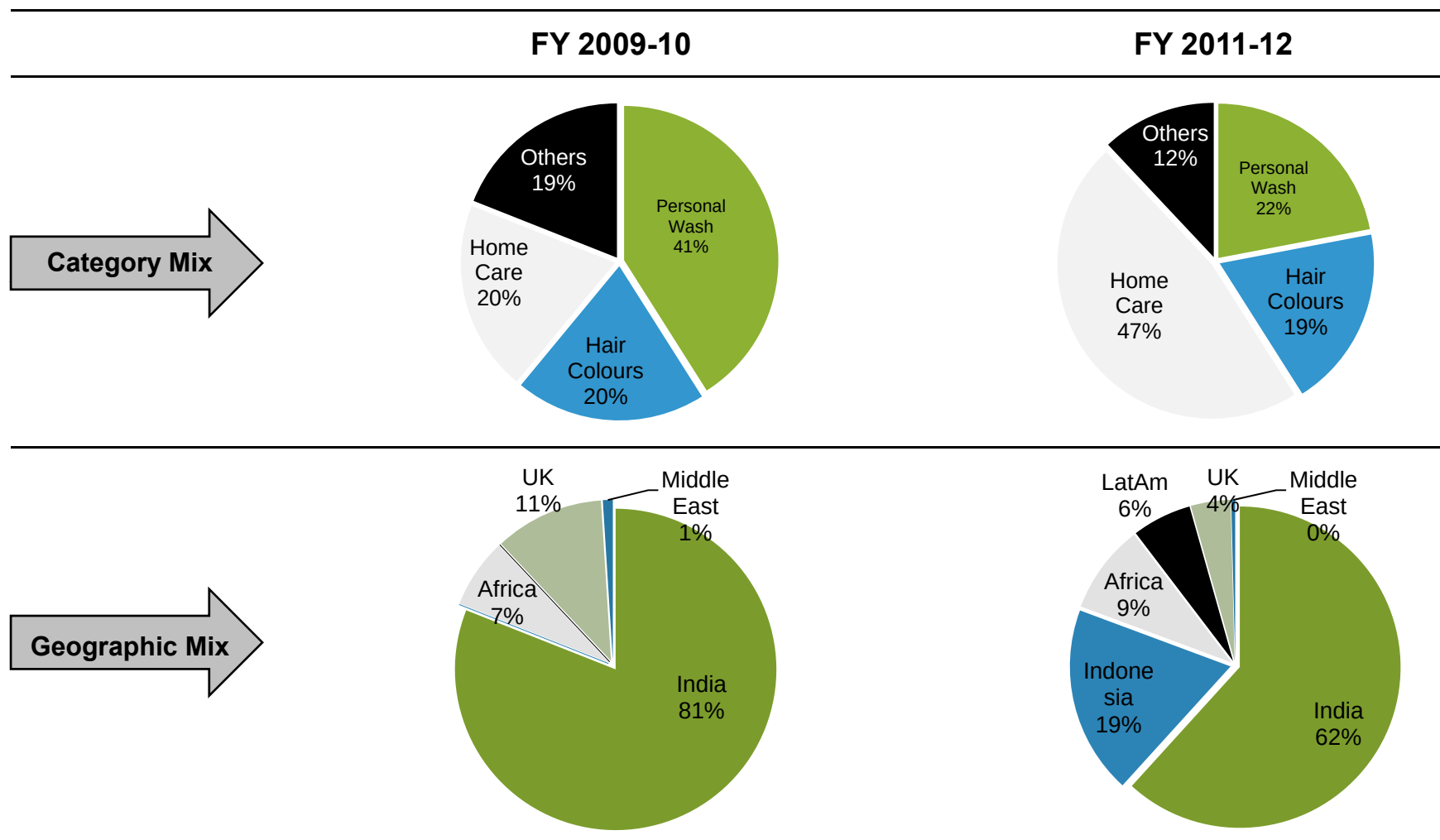


CONSUMER (GCPL)

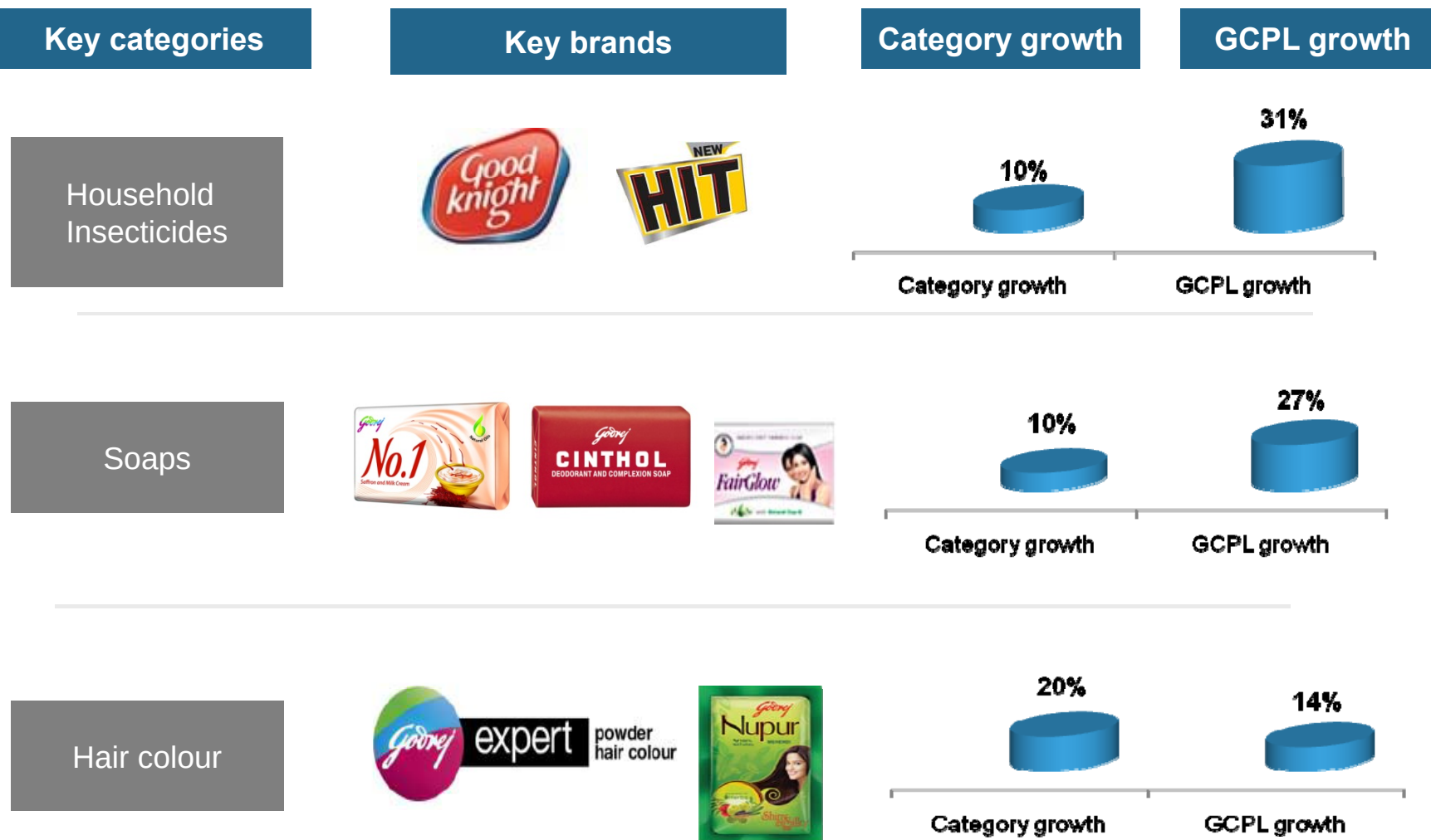
- Largest Indian home & personal care company - US \$1 billion in sales in FY 12
- Leading positions in core categories in the domestic market:
 - No. 1 in hair colours, household insecticides, and liquid detergents; No. 2 in soaps
- Strong positions in core categories internationally – home care, hair care and personal wash
- Successful integration of Phase 1 of Darling Group businesses in Africa
- Nearly 40% of revenues now come from international businesses
- Unparalleled track record of value creation among FMCG companies in India



GCPL PORTFOLIO - MORE BALANCED ACROSS CATEGORIES AND DIVERSIFIED ACROSS GEOGRAPHIES



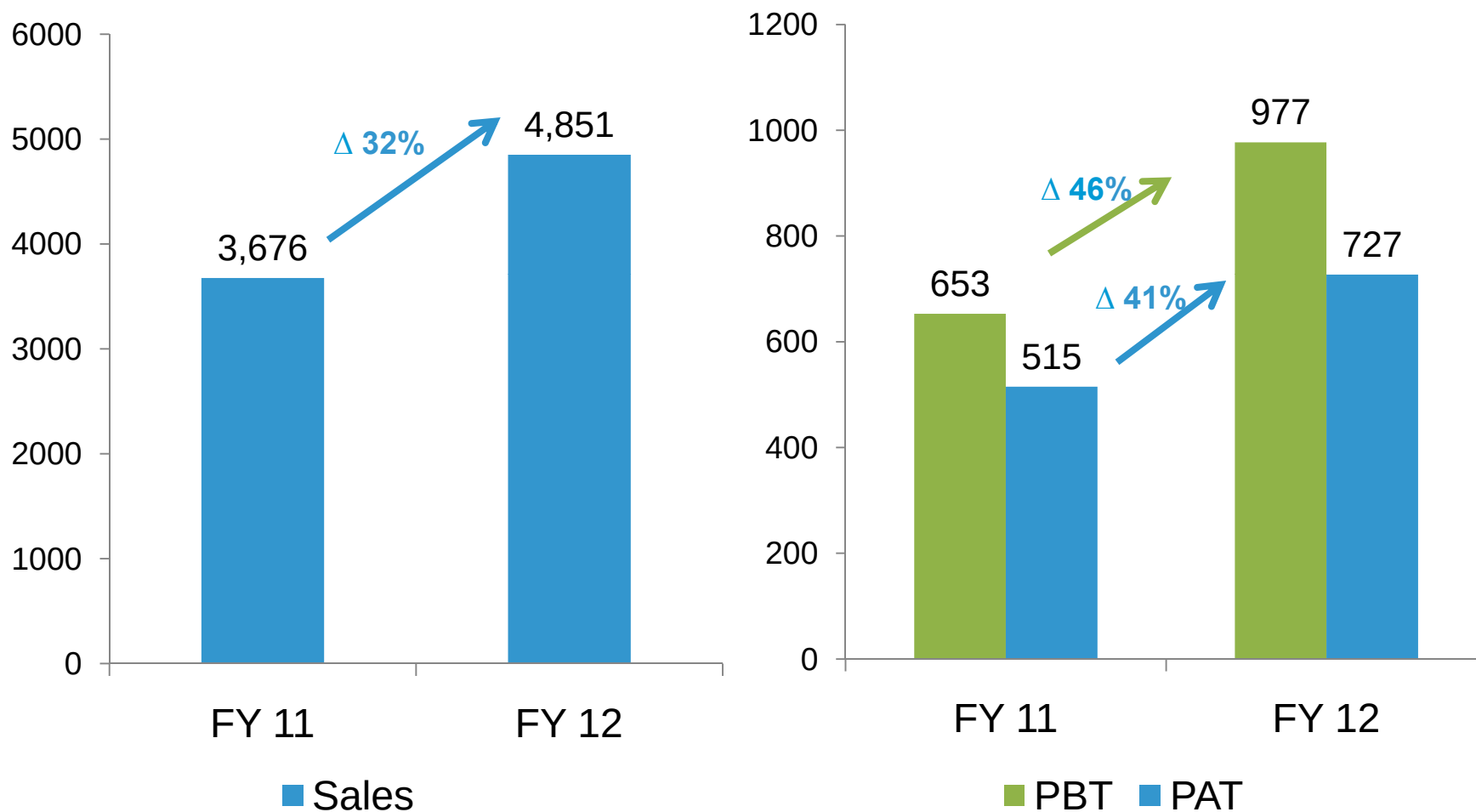
LEADING PRESENCE IN DOMESTIC CORE CATEGORIES



AND STRONG BRANDS INTERNATIONALLY

Geographies	Key brands	Category	Market share rank
Indonesia	  	Household insecticides, air care, baby wipes, & other	# 1 - Urban Home Insecticide, Air fresheners and Wet Tissues
Africa	  	Hair colours, hair extensions, soaps	# 1 - Hair extension # 1 - Ethnic Hair Colour (SA)
Latin America	 	Hair color	#1 – Volume in hair colour in several Latam markets
UK	  	Personal care	

STRONG FINANCIAL PERFORMANCE



CHEMICALS

- India's leading manufacturer of oleo-chemicals & pioneer in surfactants
- Caters to the raw material needs of high growth consumer goods sectors – Personal care, home care, tyre industry & specialised applications
- Reliable supplier to global MNCs
- Exports to over 60 countries across 6 continents.
 - 44% of FY 12 revenue came from exports
 - Eligible for status of “Star Trading House”
- New R&D centre recognized by the Department of Scientific and Industrial Research (DSIR), Ministry of Science and Technology.
- Operate from two plants: Valia (Gujarat) and Vikhroli (Maharashtra)
- FY 12 revenues of ₹ 1,284 crore are a 25% increase from previous year

PRODUCTS USED AS INPUT MATERIAL IN A VARIETY OF APPLICATIONS

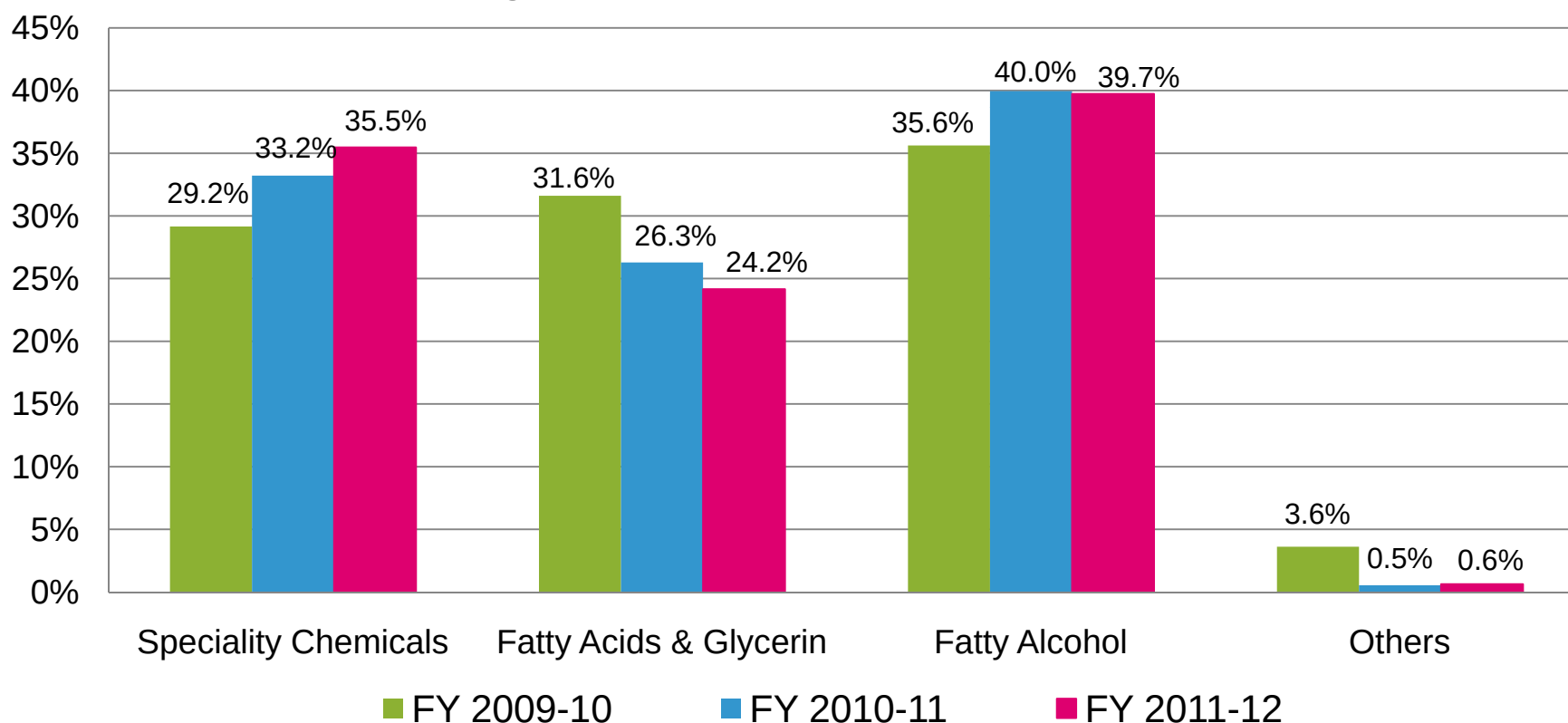
Products	Applications	Drivers for GIL
Fatty acids & glycerin	• Cosmetics and Toiletries • Rubber • Polymer • Pharmaceutical, Humectants	• Movement into specialty fatty acid to drive growth and profitability • GIL's positioning – Present across the range of applications
Fatty alcohols	• Cosmetics • Industrial applications • Personal care • Laundry	• Export sales to drive growth • Developing direct relationships with MNC clients to meet their global requirements
Surfactants	• Shampoos, Conditioners • Toothpaste • Cosmetics • Detergents	• Plans to: • Gain greater share of existing customer businesses • Upgrade to value added variants

STRATEGIC SHIFT TO SPECIALTY CHEMICALS CONTINUES

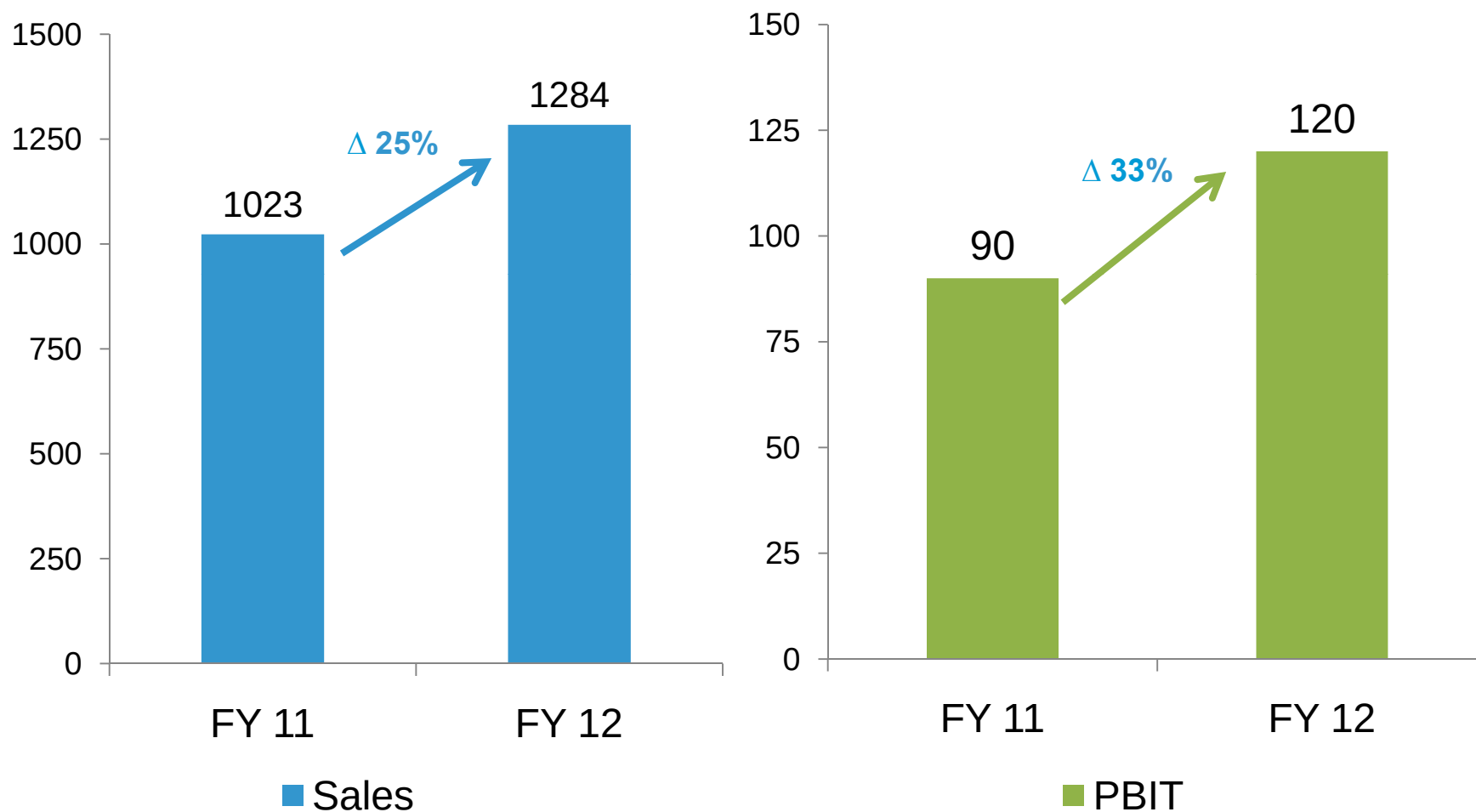
De-risking strategy resulted in increased sales in specialty products.

- Share of specialty chemicals increased to over 35% in the overall revenue mix as compared to 33% last year

Percentage share of products to Division's turnover



STRONG GROWTH IN TOPLINE AND OPERATING INCOME



Note: Values in ₹ Crore

LOOKING FORWARD FOR CHEMICALS

- Continue to build strong global position in ***long chain fatty alcohols***
- Leverage competitive advantage India has in Rapeseed oil – increase share of ***high margin derivatives of rapeseed oil*** in the portfolio
- Maintain leadership position as domestic supplier of ***Alpha Olefin Sulphonate***
- Expand product portfolio with ***adjacencies*** to current offering

GODREJ PROPERTIES LIMITED

Brings the Godrej Group philosophy of innovation and excellence to the real estate industry

- Established in 1991
- Presence in 12 cities across India
- 77 million sq ft of potential developable area
- Residential | commercial | townships
- Core expertise – Joint development model



KEY STRENGTHS FOR GODREJ PROPERTIES

Godrej Brand

- Among India's most trusted brands in an industry known for relative lack of transparency

Differentiated Business Model

- Competitive advantage in executing joint development projects
- Asset light, capital efficient and high ROE development model

National developer with strong project pipeline

- National presence with projects in 12 cities
- Added 10 projects with 10.5 million sq ft in FY 2012
- Access to Godrej Group's land banks (e.g., Vikhroli)

Access to Capital

- Confidence of financial investors – demonstrated by recently concluded IPP
- Project level equity dilution to mitigate risk and remain capital efficient
- Low bank funding rates for GPL

HIGHLIGHTS FOR GODREJ PROPERTIES IN FY 12

FY12 strongest year for new business development at GPL

- Witnessed highest deal flow : 10 JDA of 10.5 mn sq ft developable area across 6 cities
- Concluded agreement with Godrej & Boyce for the development of its entire Vikhroli landholding
- Seven deals across target markets of Mumbai, Bengaluru and NCR
- Nine residential projects and one commercial project added
- Successful entry into Mumbai Redevelopment Space
 - Entered into a Tripartite agreement to redevelop 18 residential buildings in Sahakar Nagar, Chembur having a saleable area of ~0.6 mn sq ft

Successful completion of Institutional Placement Programme (IPP)

- Raised ₹ 470 crores through Indian's first IPP
- Programme was oversubscribed 1.17 times in a capital scarce environment

HIGHLIGHTS FOR GODREJ PROPERTIES IN FY 12

Continued progress in ongoing sales in spite of a tough environment

- Total booking value of ₹ 1,563 Cr. in FY 12 compared to a total booking value of ₹ 1,072 Cr. in FY 11
- Strong growth in commercial sales, compared to previous year
 - 6.74 lakh sq. ft of commercial sales in FY 12 (including Godrej One) compared to 0.90 lakh sq. ft of commercial sales in FY 11

New launches

Apart from new phases in on going projects, new projects launched in:

- Bengaluru (Godrej Platinum)
- Nagpur (Godrej Anandam)
- Chennai (Godrej Palm Grove)
- Mumbai (Godrej Platinum)
- Mangalore (Godrej Alpine)

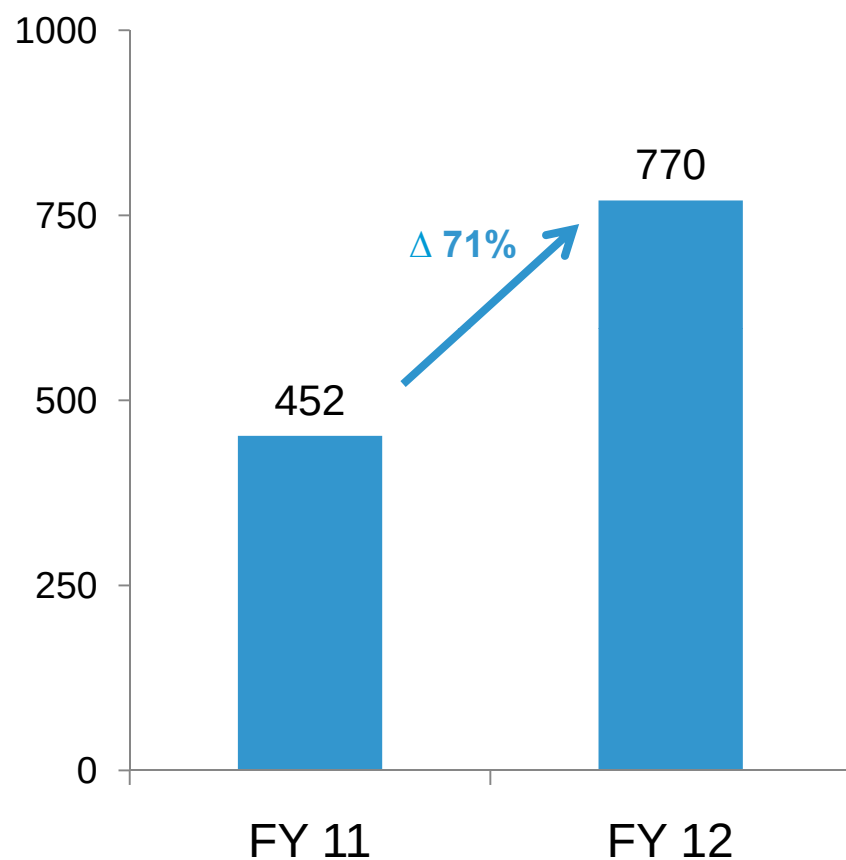
AWARDS AND RECOGNITIONS

12 awards won in FY12 including:

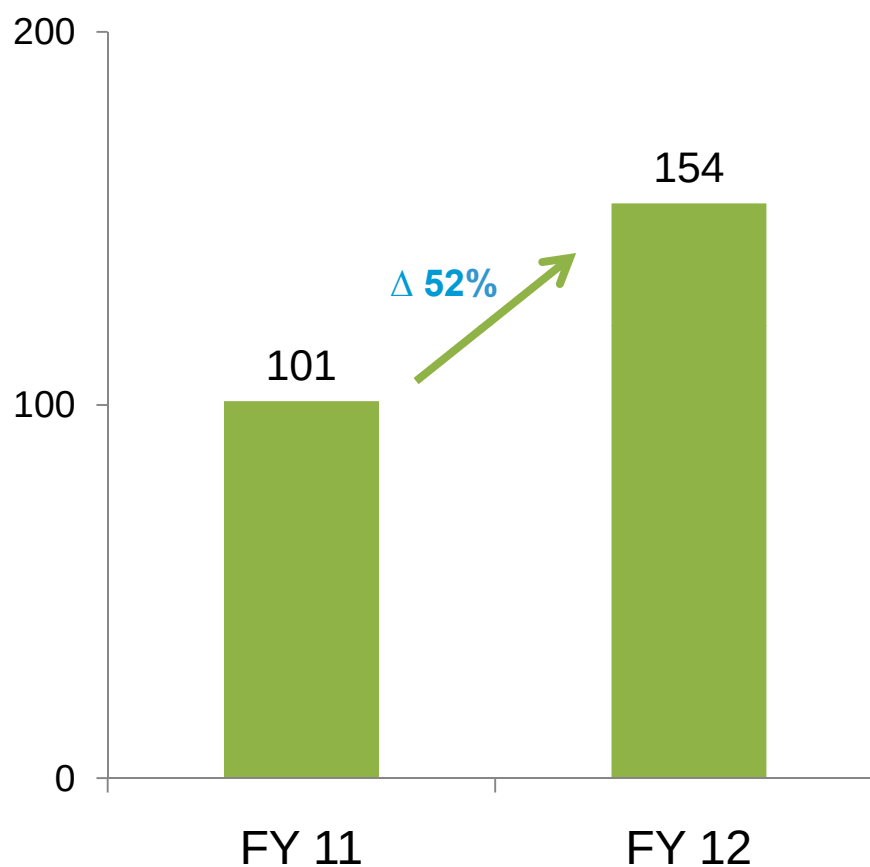
- **'Corporate Governance of the Year', 2011** by Accommodation Times at 26th National Real Estate Awards
- **'Top Ten Real Estate Companies'** at STAR REALTY 2011-12
- **'Best Emerging National Developer'** at Zee Business -RICS Real Estate Awards
- **'Most Trusted Names in the Real Estate industry' & 'India's Best Marketed Real Estate Company, 2011'** by 4Ps Business and Marketing in association ICMR
- **1st Rank in Real Estate Industry and amongst Top 100 companies** in India's "Best Companies to Work For" by The Great Place to Work Institute, India
- **Top 200 Power Brands 2011-12** by ICMR
- **'Asia's Most Admired Brand'** award in the Real Estate Sector for Godrej Garden City, Ahmedabad at the Asian Leadership Awards 2011
- **'Best Marketing Campaign of the Year'** at the CMO Asia Awards



FINANCIAL RESULTS FOR GODREJ PROPERTIES



■ Sales & Operating Income



■ Profit from Operations

Note: Values in ₹ Crore

Profit from operations is before interest charges and other income

VIKHROLI DEVELOPMENT PROJECT

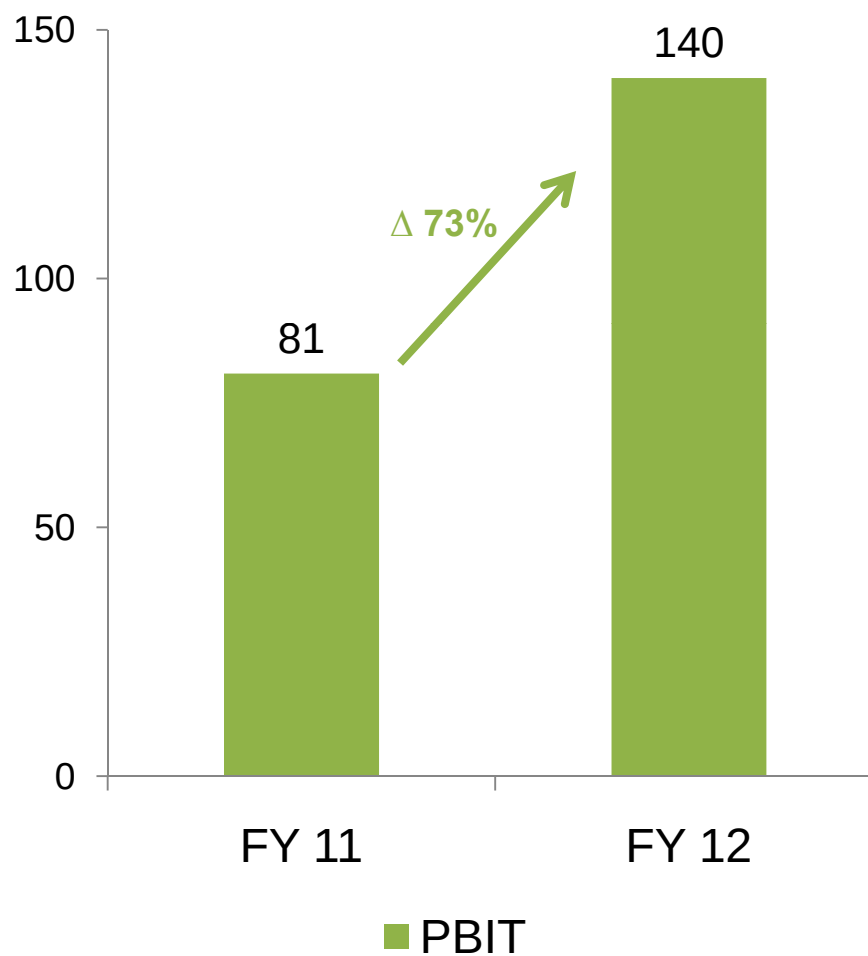
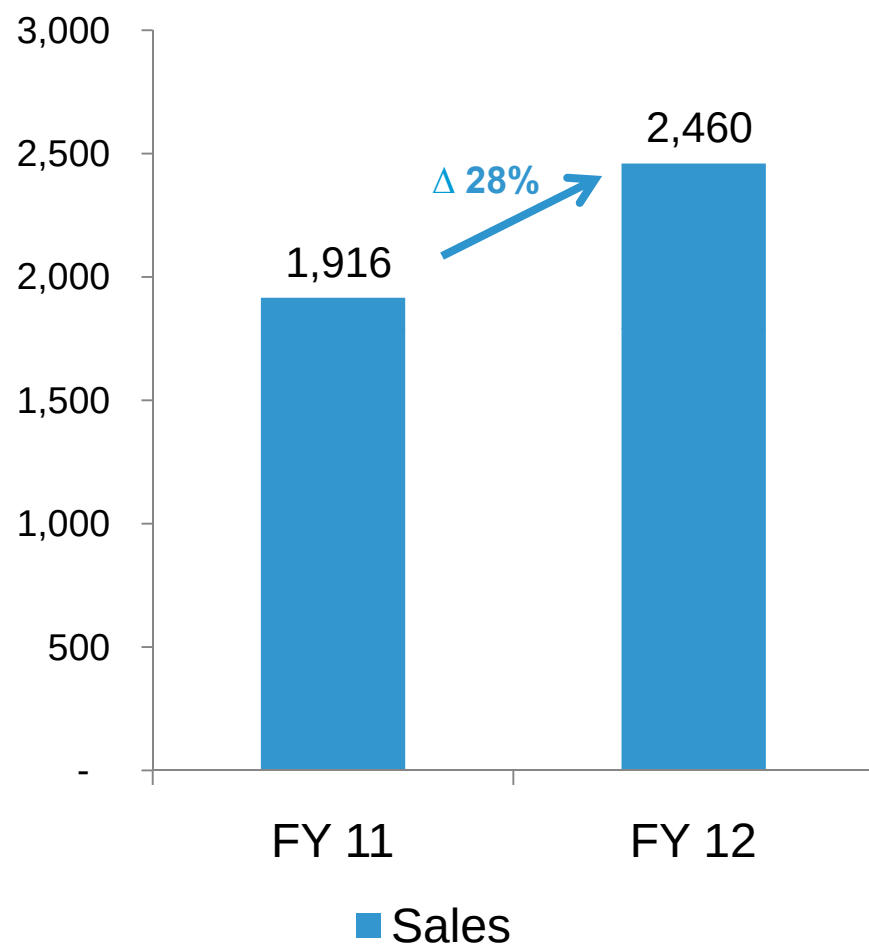
- 34-acre mixed development project “**The Trees**” at Vikhroli being developed by Godrej Vikhroli Properties LLP (GVPL)
- Land purchased from Godrej & Boyce for a total consideration of ₹ 717 crores to be paid over five and a half years
- Saleable area of project expected to increase from 2.8 million sq ft to 3.5 million sq ft based on new changes in Mumbai’s DCR rules
- GPL’s strategy will be to sell significant amount of space in the mixed use project compared to leasing out finished space as initially planned
- 60:40 JV between GPL & GIL on profit sharing basis
- GIL would effectively be beneficiary of **76.9% of profits** (through its direct 40% share in profits + its 61.5% stake in GPL)
- Construction of “**Godrej One**” - a 0.75 million sq ft commercial office building – is on schedule; existing buildings will be vacated to free up space for “The Trees” development

AGRI BUSINESSES

Godrej Agrovet (GAVL) is a diversified agribusiness with FY 2012 sales of ₹ 2,460 crore

- **Animal Feed** – India's largest commercial feed miller; market leader in cattle, poultry and aqua feed
- **Oil palm plantations** – largest oil palm cultivator in India
- **Agri inputs** – niche player focused on plant growth regulators, herbicides, etc.
- **Poultry** – JV with Tyson Foods, the world's largest meat processor

STRONG FINANCIAL RESULTS FOR GAVL

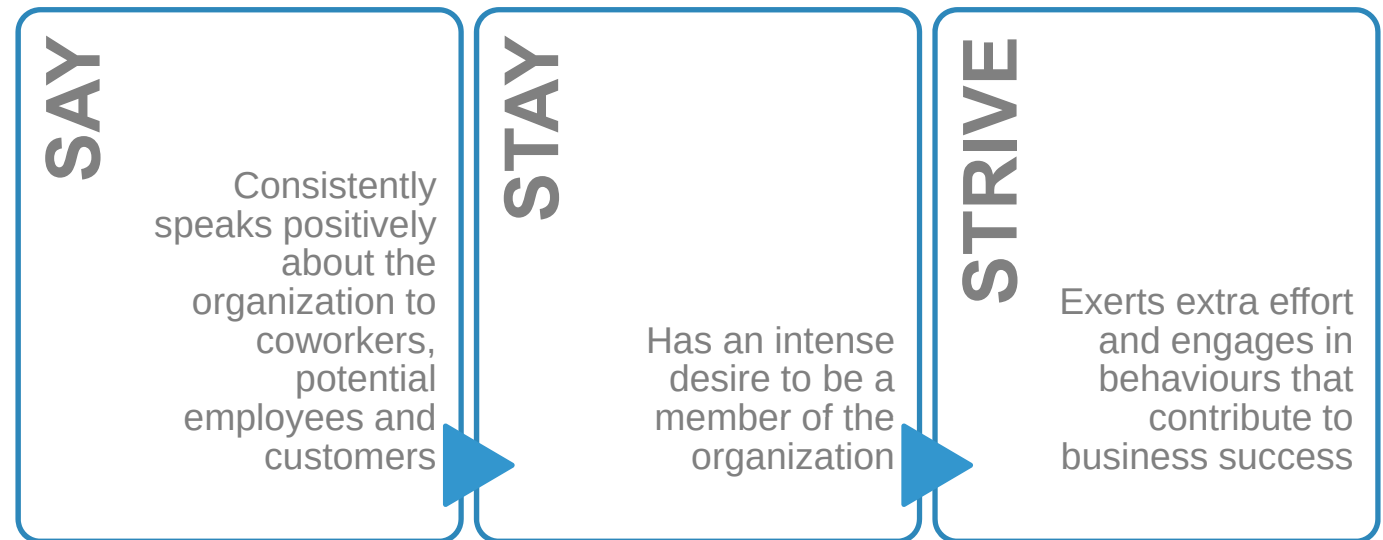


Note: Values in ₹ Crore

TRANSFORMATION

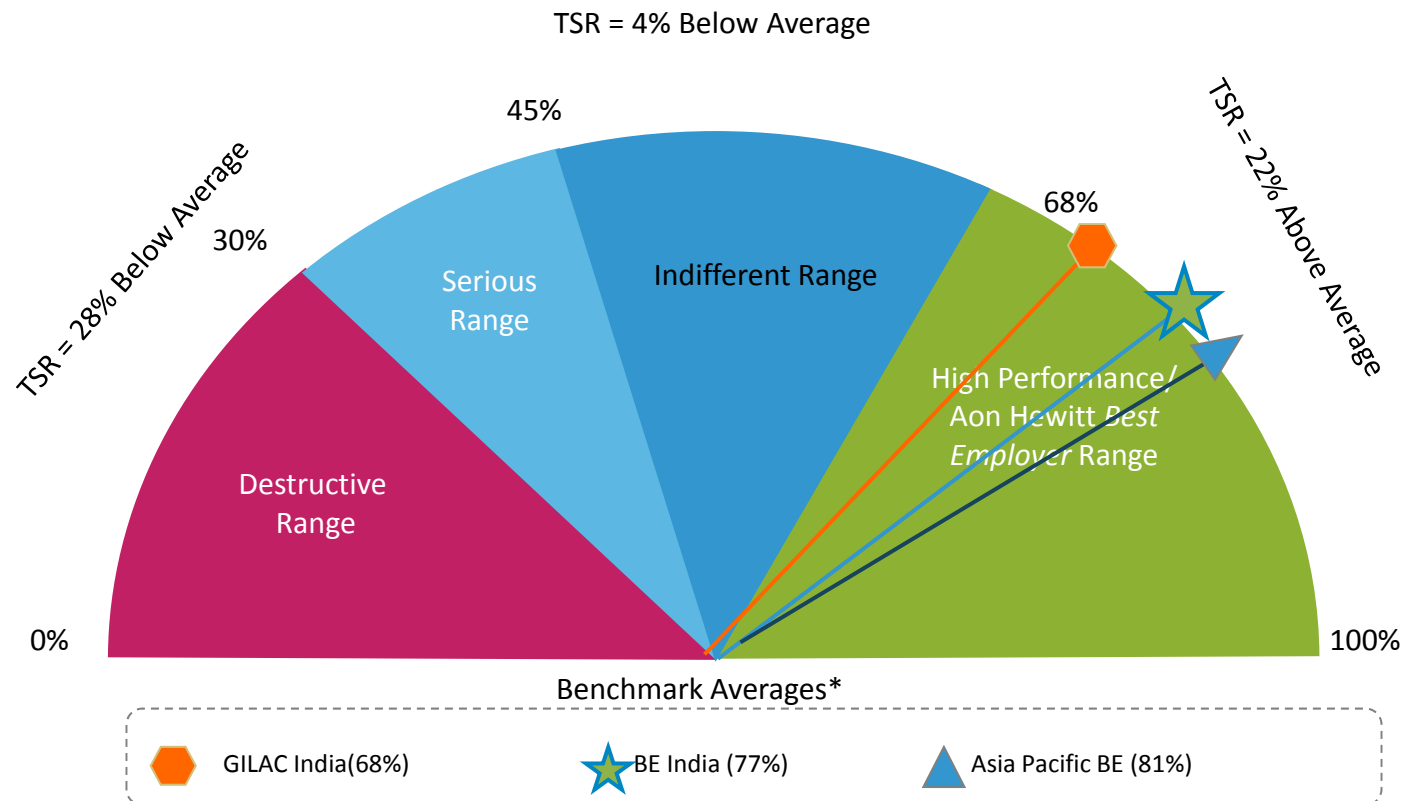
GODREJ IN TUNE EMPLOYEE ENGAGEMENT SURVEY 2011

- Revised the GILAC Employee Engagement Study, in association with Aon Hewitt, a leading HR consultancy firm
- Survey conducted across both domestic and international businesses
- GILAC India engagement level is high (68%) and falls within the Aon Hewitt Best Employer Range



WE ARE BUILDING AN INSPIRING PLACE TO WORK

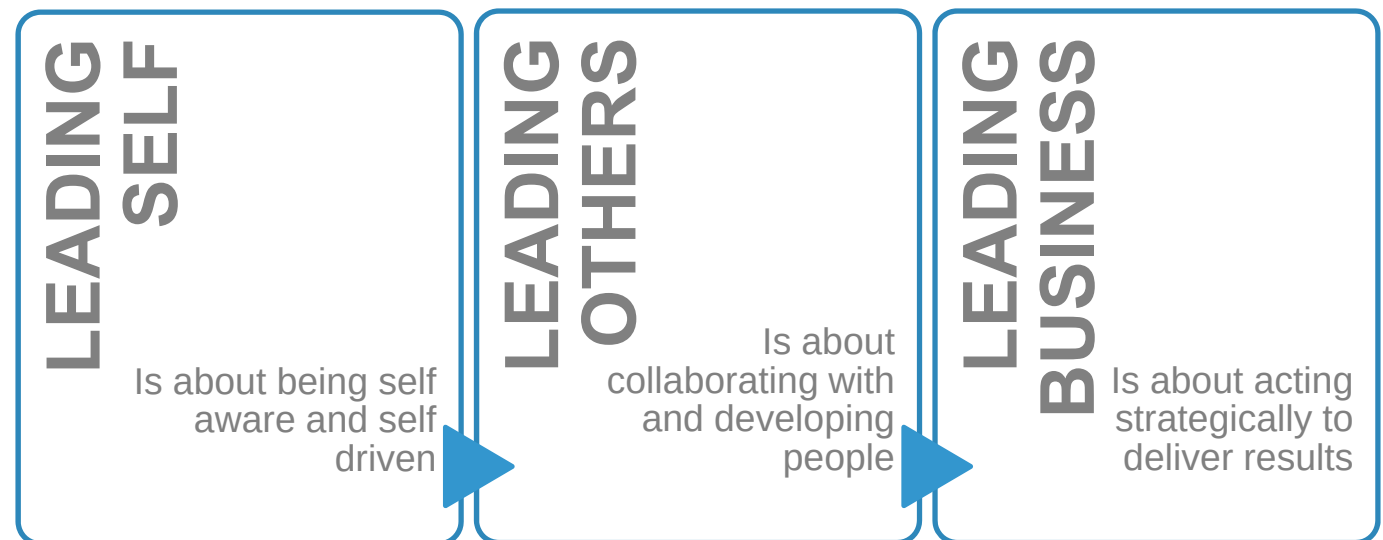
GODREJ IN TUNE RESULTS



TRANSFORMATION

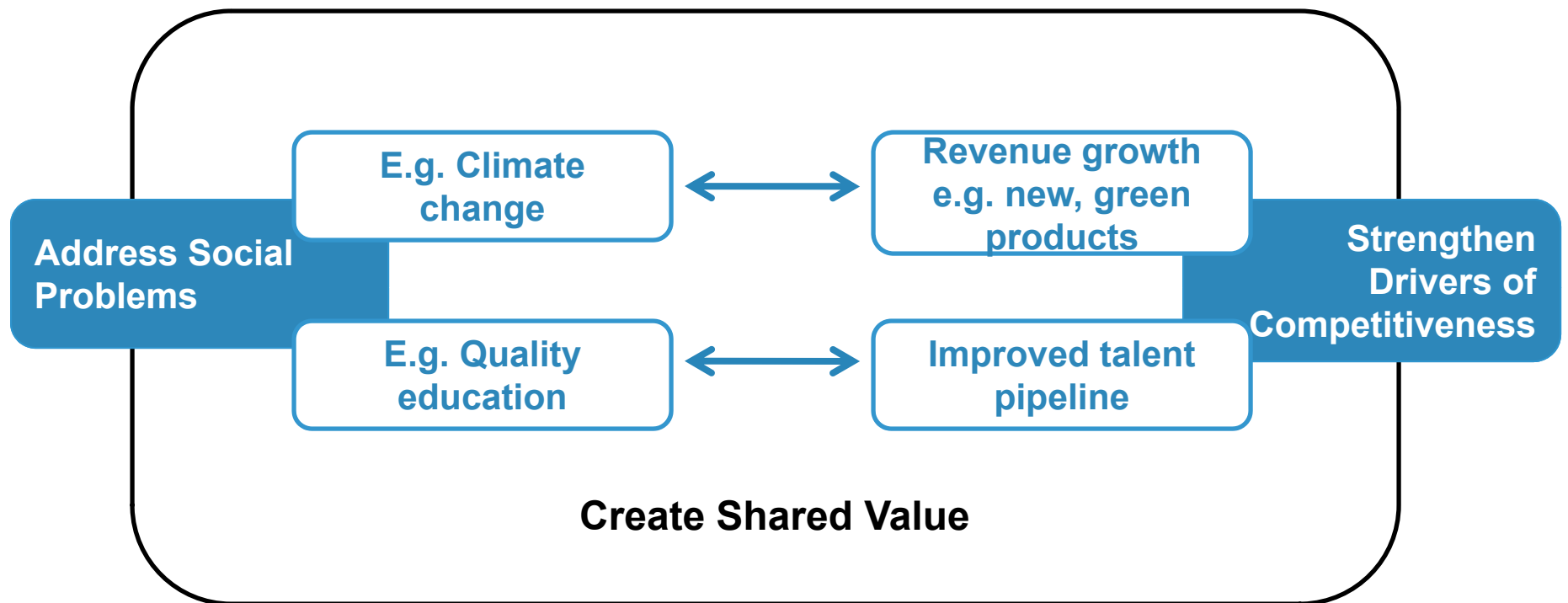
BUILDING A FUTURE READY ORGANISATION

- Building the talent pipeline – Strengthened and launched a new set of leadership competencies: the Godrej Capability Factors
- Developing our people through the Godrej Leadership Series based on Leading Self, Others and Business – 89 leaders have already participated in these specially designed programmes
- Investing in HR technology platforms – Tied up with Success Factors, a best in class performance management software



TRANSFORMATION

EMBRACING SHARED VALUE ACROSS THE GROUP



The concept of **shared value** can be defined as policies and operating practices that enhance the competitiveness of a company while simultaneously advancing the economic and social conditions in the communities in which it operates.

TRANSFORMATION

WE HAVE DEFINED A COMMON SOCIAL RESPONSIBILITY VISION FOR THE GROUP



Beyond Business: Building a More Inclusive and Greener India

by 2020...

**ensuring
employability**

train 1 million rural and
urban youth in skilled
employment

**creating a
greener India**

achieve zero waste, carbon
neutrality, positive water
balance and 30% renewable
energy usage

**innovating for
good & green**

have a third of our
portfolio revenues
comprising good and/
or green products and
services

EMERGENT

GODREJ HERSHEY LTD

- FY 2011-12 revenues were ₹ 392 crores - 8% higher than previous year
- Market leader in the candy segment with over 20% market share
- **Hershey's Milk Mix** sales grew by 23% in FY12; **Sofit** sales up by 5%; **Jumpin** sales by 8% ;
- Business highlights during FY 2011 -12:
 - Product improvements – **Jumpin** straw on pack, formulation upgrade
 - **Choco Rocko**, a unique experience offered in a differentiated product format, launched at higher price points (₹ 2, 5 & 12) to up-trade the consumer and drive profitability



EMERGENT

NATURE'S BASKET LTD

- Started in 2005 as a fresh food retailer; morphed into fine food retailer in 2008
- Now India's leading fine Gourmet retail chain and a leader in the niche space
- 20 stores located in premium residential catchments across 5 key metros - Mumbai, Delhi/NCR, Pune, Hyderabad, and Bengaluru
 - 7 new stores opened in FY 11-12 across 3 metros
- Caters to up-market urban consumers for authentic world food, ingredients, organic foods, health foods, delicatessen, boulangerie, and finest beverages including wines and beer
- Loyalty program unveiled across all metros in FY 12
- Online retailing presence enhanced
- Revenues at ₹ 82 crore for FY 11-12 grew by 48% over FY 10-11
- Awarded the 'Most Admired food retailer of the year in the Foreign Foods Category' at prestigious Coca Cola Golden Spoon Awards - 2011



INVESTMENT RATIONALE

 brand advantage

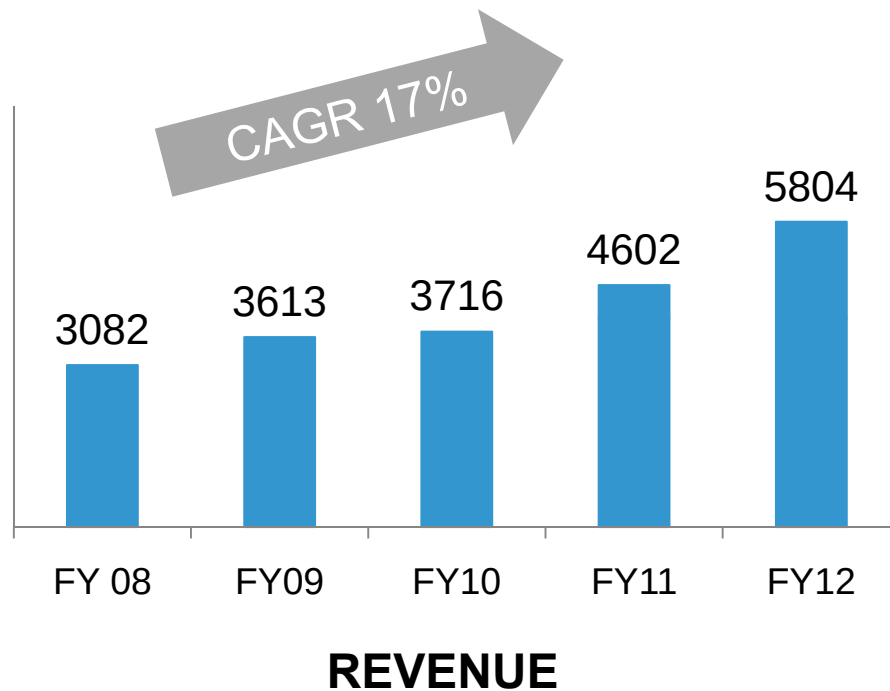
systematic **value creation** approach



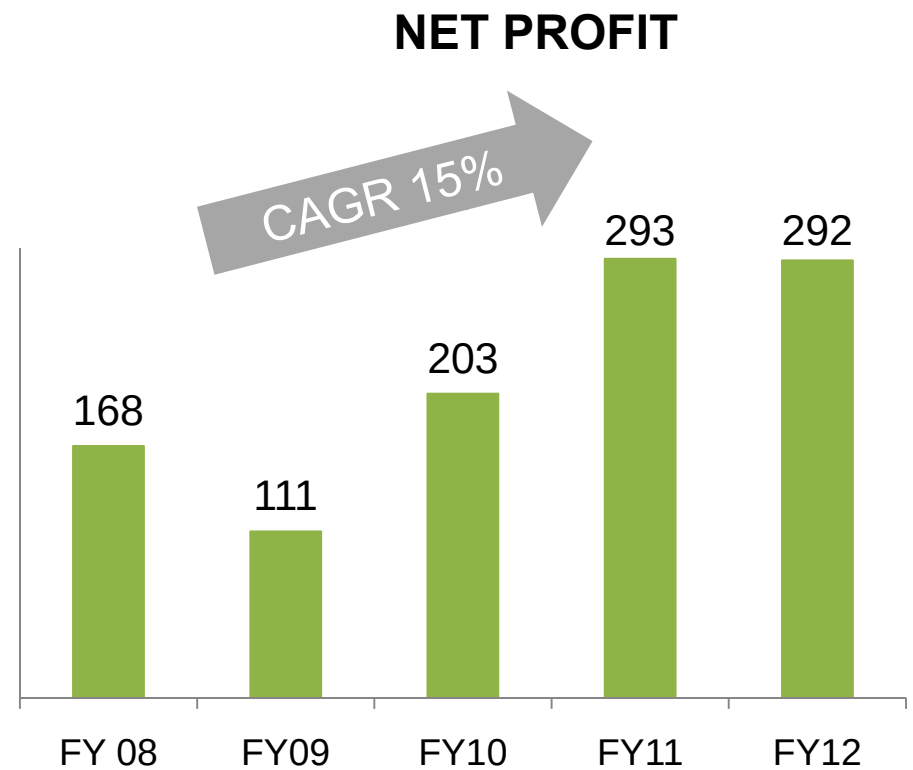
Proven **track record** of value creation

strong value of **underlying assets**

STRONG FINANCIAL PERFORMANCE



Figures in ₹ crore

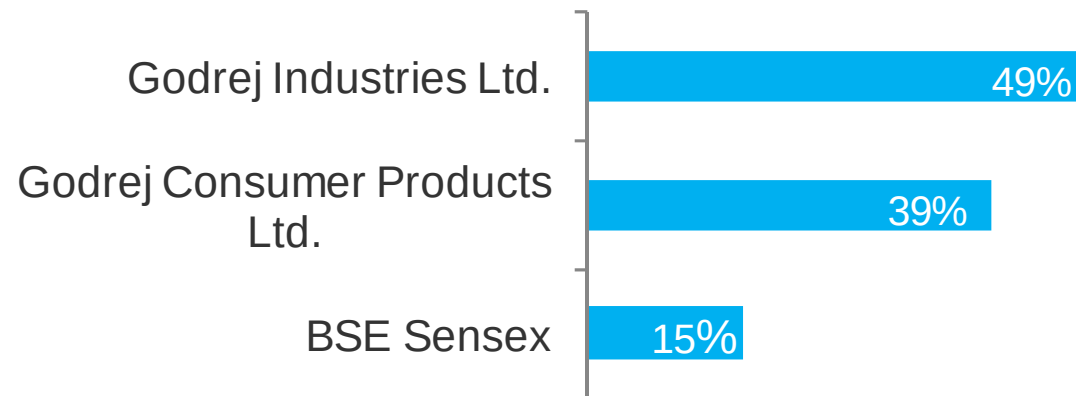


Due to JVs, restructurings, acquisitions, divestitures, etc. revenue and profit figures are not strictly comparable from year to year.

HISTORY OF VALUE CREATION

A proven track record of **value creation**

11 year compounded annual growth rate (CAGR)



Note: CAGR calculated on closing stock prices as of June 18th, 2001 and May 31st, 2012

INVESTMENT RATIONALE

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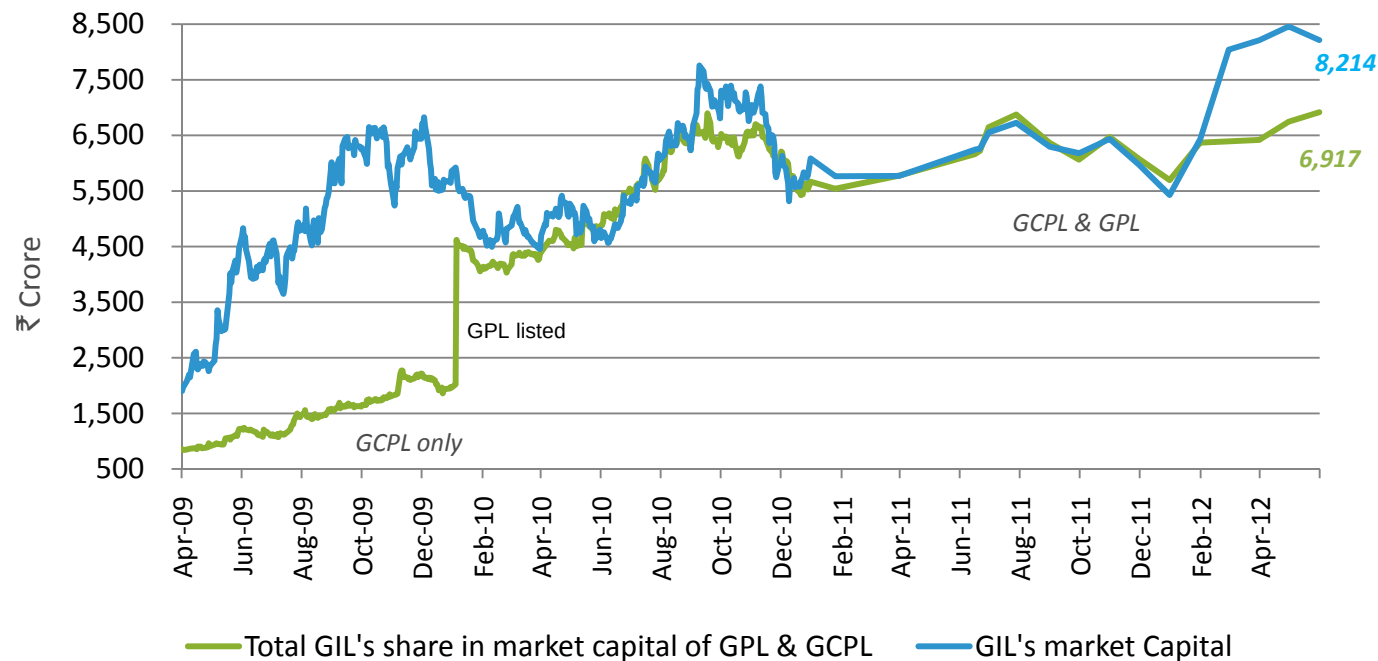
 strong value of **underlying assets**

SIGNIFICANT APPRECIATION IN INVESTMENT VALUE

Company	Business	Holding (%)	Investment at cost (₹ Crore)	Market Value* of investment (₹ Crore)
Godrej Consumer Products	FMCG, Personal and Household Care Products	21.2	583	3,453
Godrej Properties	Real Estate and Property Development	61.5	230	2,967
Godrej Agrovet	Animal Feed, Agri-inputs, Poultry & Oil Palm	75.2	163	
Godrej Hershey	Food, Beverages and Confectionery	43.4	221	
Godrej International	International Trading	100.0	15	
Natures Basket	Fresh food & Gourmet Stores	100.0	41	
M*Modal (formerly MedQuist)	Medical Transcription	2.6	31	79
Others	Bio- Technology, KPO, etc.		70	
Total			1,354	

* as on March 31, 2012

VALUE UNLOCKING POTENTIAL



- GIL represents a unique opportunity to participate in several high growth sectors in India while remaining de-risked from the vagaries of any single industry
- With a presence in industries that are cyclical (Properties) and more stable (FMCG); businesses that are rural (Agrovet) and urban (Properties); businesses that are global (FMCG) and domestic (Properties), GIL offers a multifaceted opportunity to participate in the India growth story

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Other Valuable interests

Animal Feed
(FY 2012 Revenue :
₹ 1,748 crore)

Oil Palm Plantation
(FY 2012 Revenue :
₹ 224 crore)

Confectionary / Foods
(FY 2012 Revenue :
₹ 170 crore) (for 43.4% share)

Oleo Chemicals/Veg Oils
(FY 2012 Revenue :
₹ 2,516 crore)

Other Agri / Poultry
(FY 2012 Revenue :
₹ 431 crore)

The Trees
3.5 million sq feet
mixed use development

GODREJ AGROVET DEEP DIVE



Animal Feed

- India's largest commercial feed miller
- Market leader in cattle, poultry, and aqua feed
- Bangladesh JV with ACI



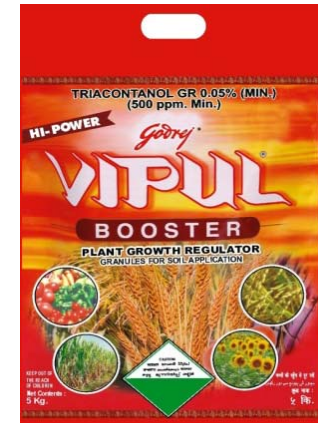
Poultry (Godrej Tyson)

- Market leader in processed poultry, frozen snacks
- Partnered with Tyson Foods, the world's largest meat processor



Oil Palm

- Largest oil palm cultivator in India, with over 45,000 hectares
- Operating in AP, TN, Goa, Orissa, Gujarat, Mizoram, Maharashtra, and Karnataka

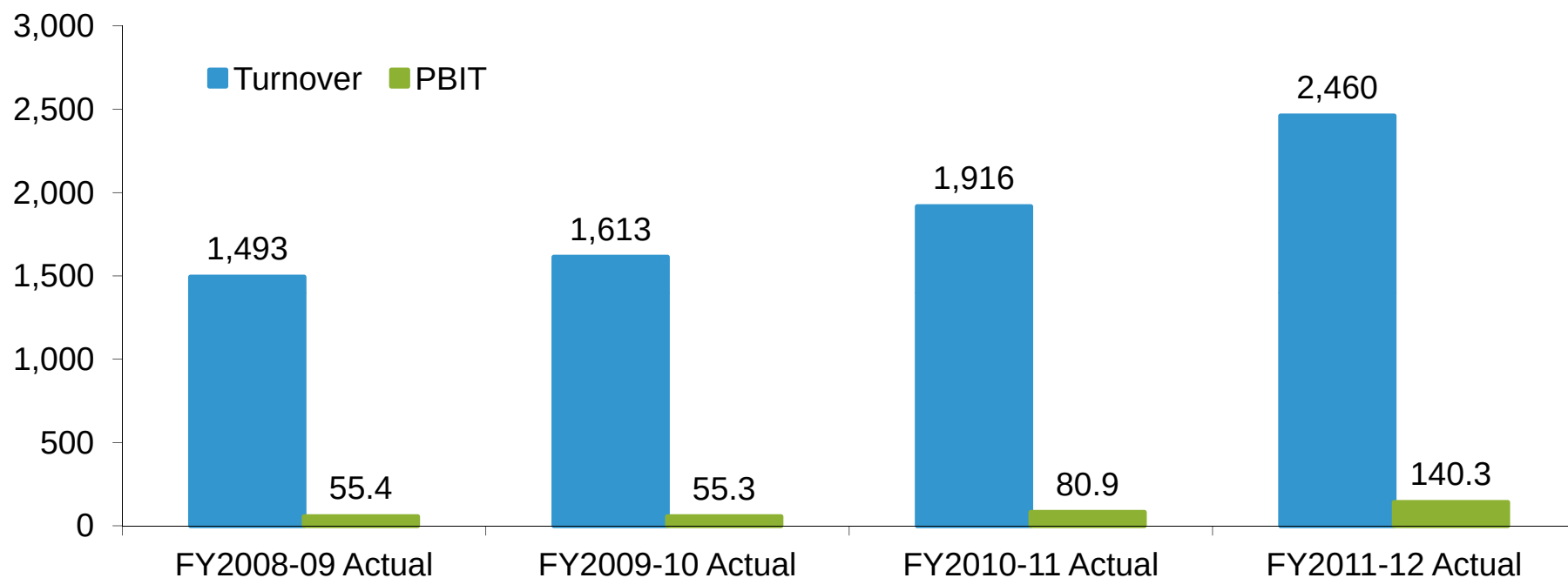


Agri Inputs

- Market leader in plant growth regulators, soil conditioners, cotton herbicides
- Strong pipeline of innovative products

GAVL DELIVERED EXCELLENT FY2012 PERFORMANCE

Annual Consolidated Results (₹ crore)

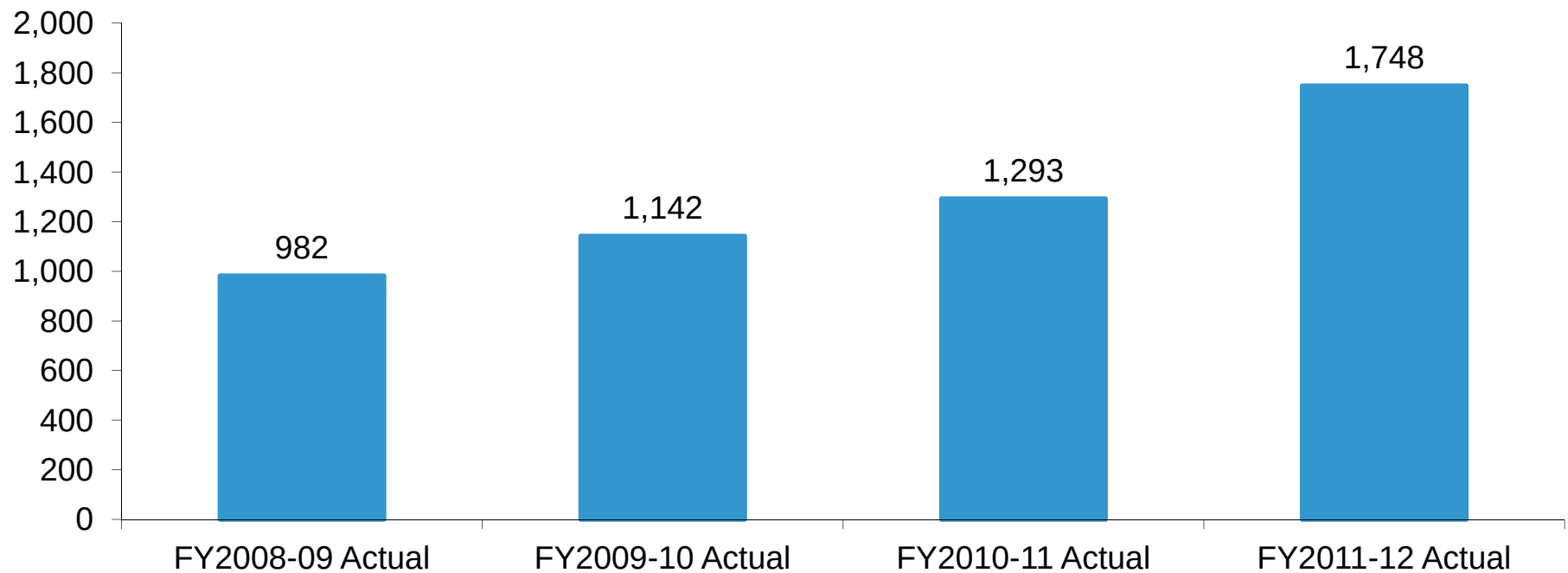


PBIT/Sales	3.7%	3.4%	4.2%	5.7%
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- Consolidated Turnover increased by 28.4% since FY2010-11
- Consolidated PBIT increased by 73.4% since FY2010-11
- PBIT as % of Sales has increased to 5.7% from 4.2% in FY2010-11
- Investments in R&D, Quality, Marketing, and Tech Service have reshaped GAVL

ANIMAL FEED ACHIEVED AGGRESSIVE SALES GROWTH

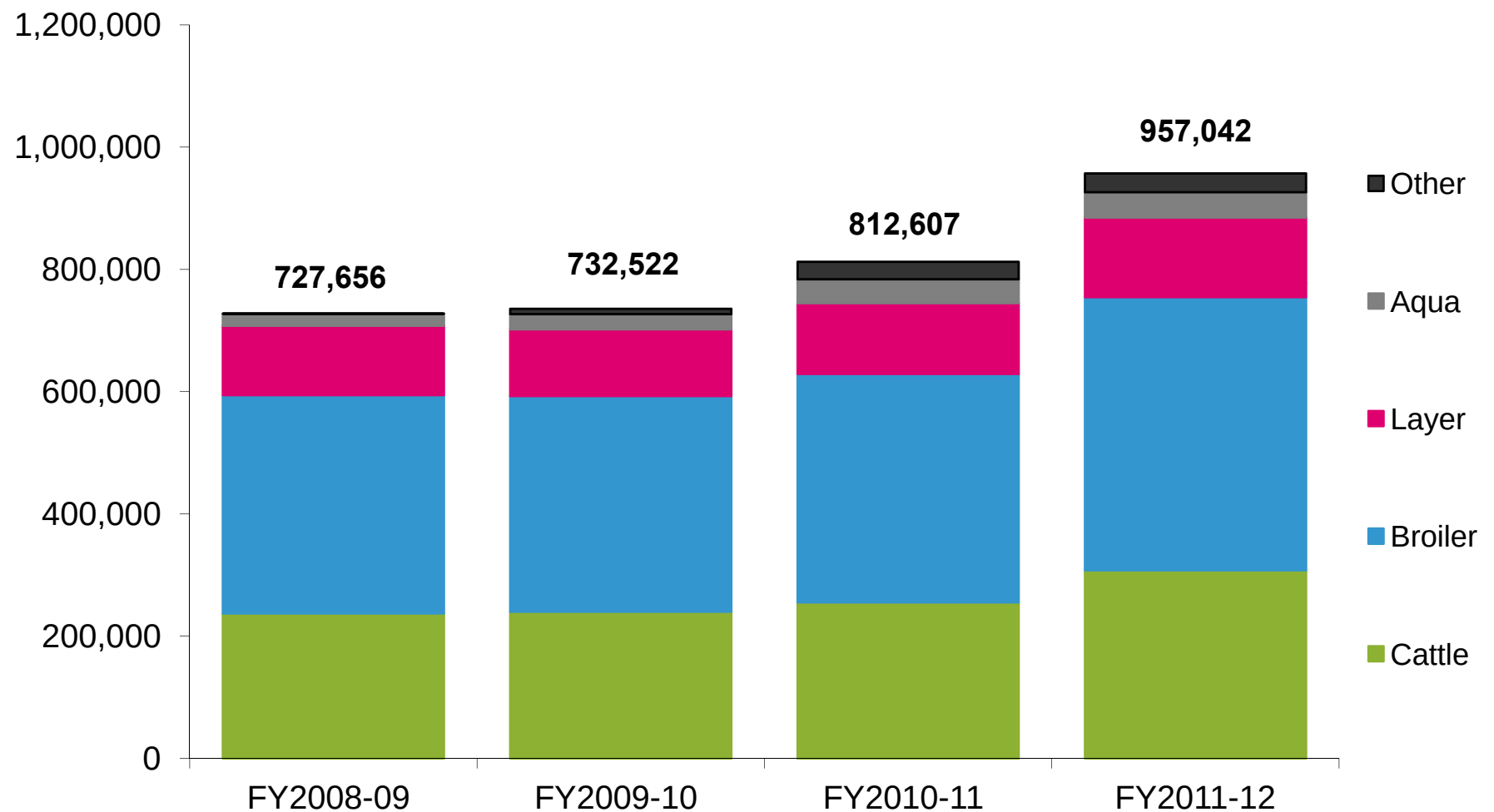
Annual Animal Feed Sales (₹ crore)



- Animal Feed Sales increased by 35.2% since FY2010-11
- Feed sales volumes increased by 17.8% since FY2010-11
- Return on Capital Employed (ROCE) for FY2011-12 was 337%
- Volume growth realized across all categories and regions
- New feed mill capacities coming online across India

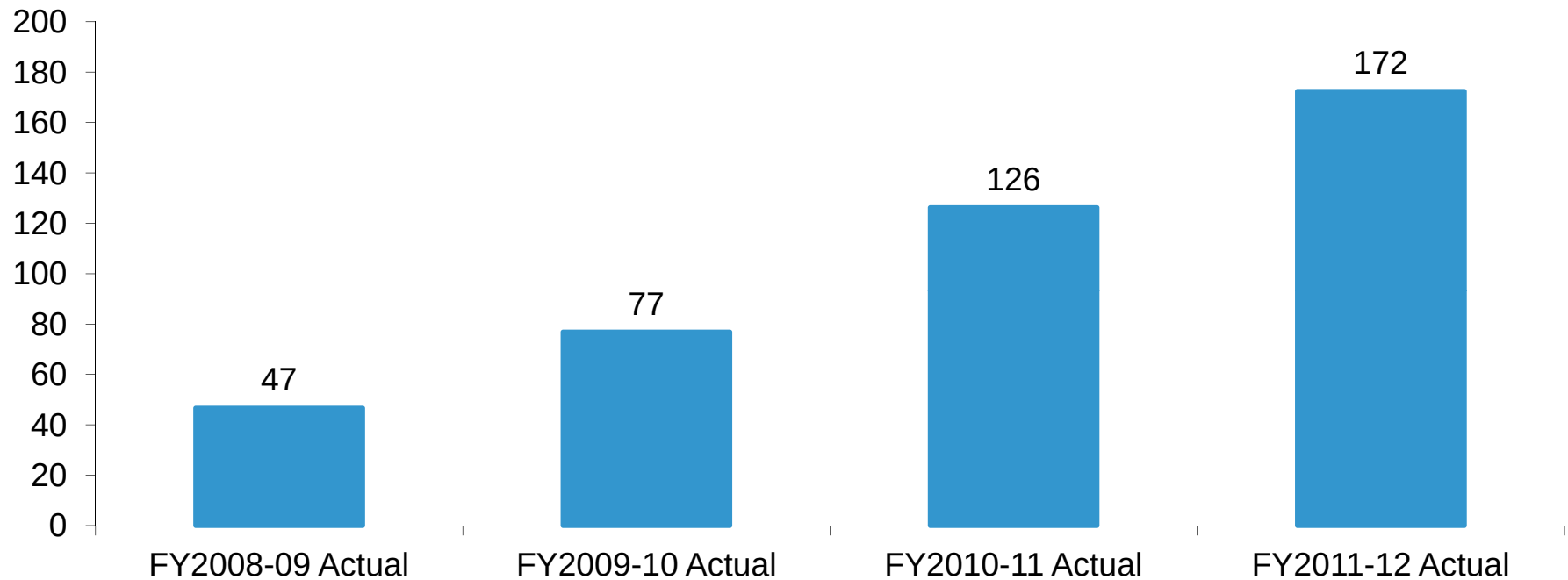
ANIMAL FEED TONNAGES HAVE CONTINUED TO CLIMB

Animal Feed Volumes (MT)



BANGLADESH JV IMPACTED BY WIDESPREAD BIRD FLU

Annual ACI Godrej Sales (₹ crore) *



- ACI Godrej Sales increased by 36.6% since FY2010-11
- Given bird flu, pushing fish feed volumes to deliver FY2012-13 business growth
- Currently expanding floating fish feed production capacity
- Poultry breeding business currently on hold due to disease situation

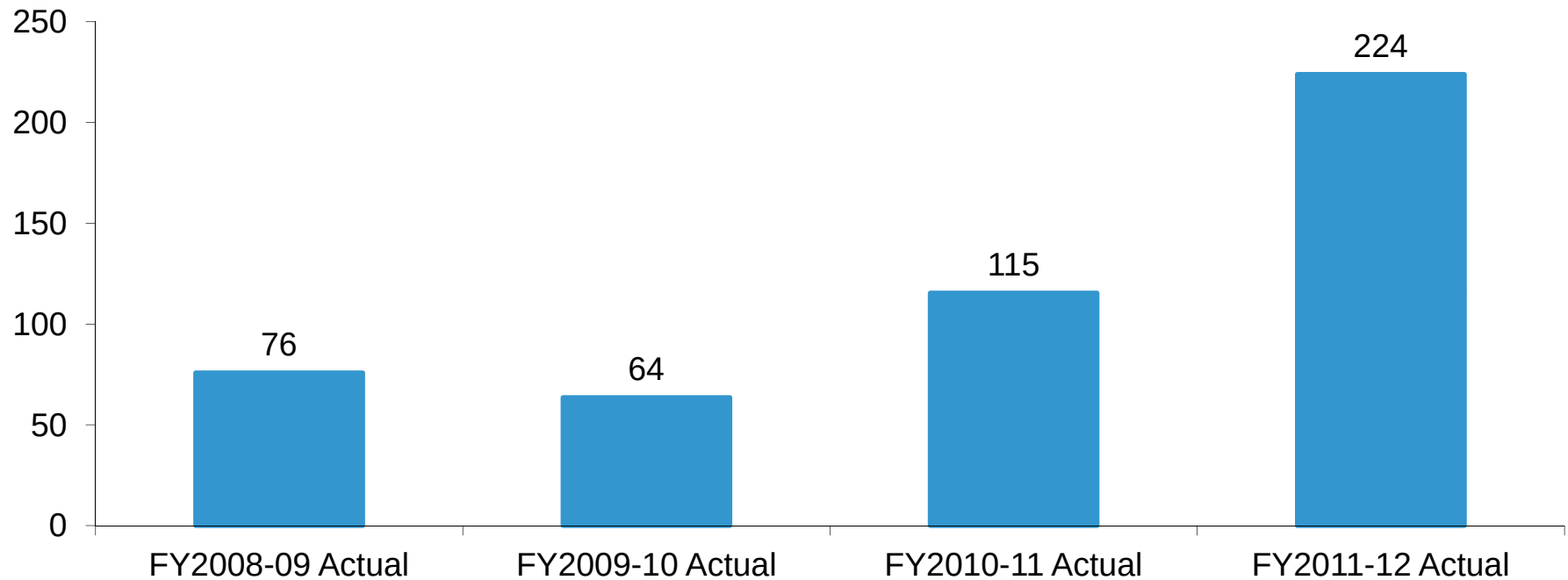
STRATEGIC PRIORITIES FOR ANIMAL FEED BUSINESS

- Augmenting capacities, with new feed mills being established
- Expanding margins through nutrition R&D, strategic purchasing, and logistics
- Accelerating development of innovative livestock nutrition products
- Completing world-class animal nutrition R&D facility at Nashik
- Rebuilding cattle feed business in UP and Punjab
- Exploring Myanmar market for animal feed/nutrition opportunities



GAVL OIL PALM HAS BEEN RAPIDLY SCALING UP

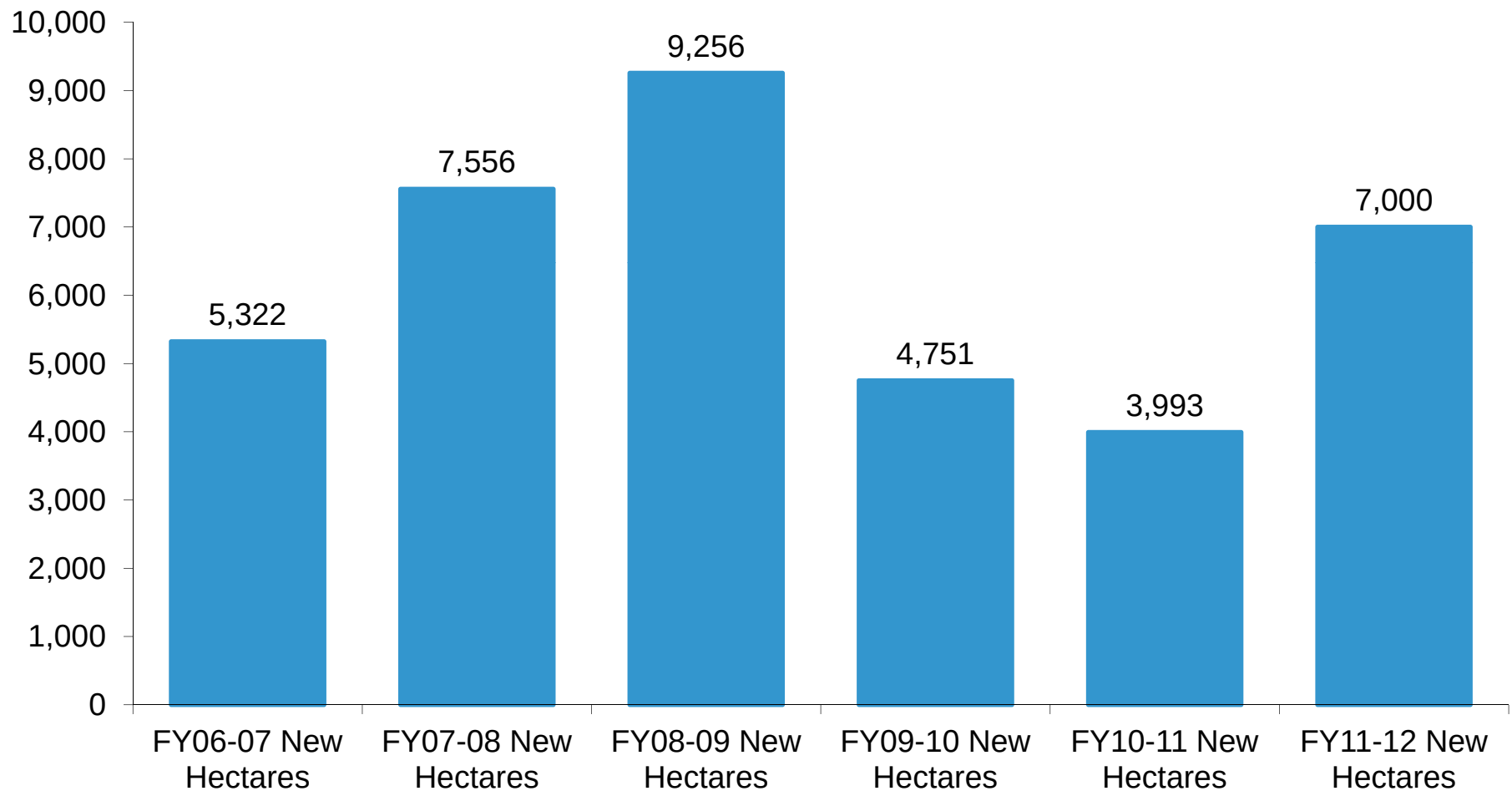
Annual Oil Palm Sales (₹ crore)



- Oil Palm Sales increased by 94.3% since FY2010-11
- Beginning to reap high volume growth from maturing plantations
- FFB tonnage increased by 63.9% since FY2010-11
- Over 7,000 new hectares of oil palm cultivated in FY2011-12
- New areas allotted include S. Baroda (Gujarat); Udipi & Dakshina Kannada (Karnataka); Sangli, Kolhapur & Sindhudurg (Maharashtra)

OPP NEW CULTIVATION RATE HAS ACCELERATED

Oil Palm New Cultivation (Hectares)



STRATEGIC PRIORITIES FOR OIL PALM BUSINESS

- Accelerating area expansion, especially in TN, Maharashtra, and Gujarat
- Launching two additional leaf & soil laboratories to improve oil palm yields
- Commencing oil palm R&D program, focused on harvesting and intercropping
- Introducing targeted interventions to support oil palm farmers
- Distributing high quality fertilizer and drip irrigation to oil palm farmers

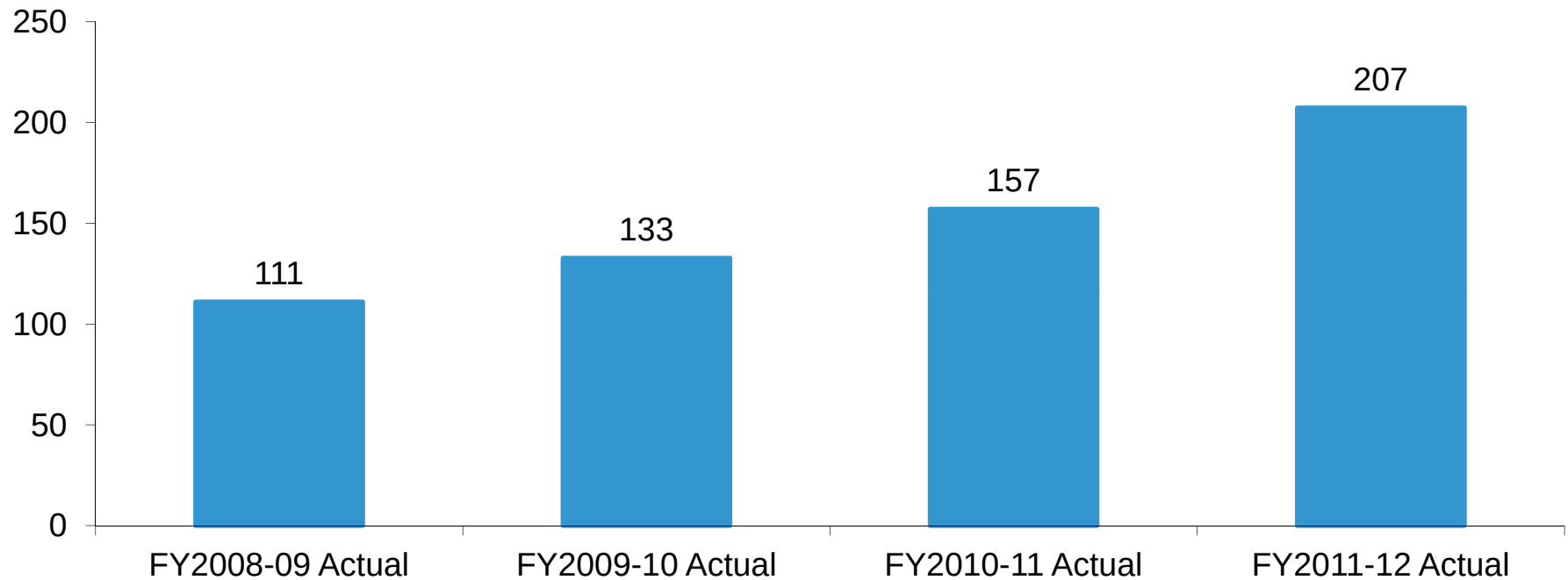


PUTTING DRIP IRRIGATION LAUNCH PLANS ON HOLD

- Over the past 24 months, GAVL has evaluated multiple opportunities in the drip irrigation industry
 - potential acquisitions, joint ventures, greenfield operations
- During this time, drip irrigation market conditions have steadily worsened
 - subsidies have been bottlenecked by state governments
 - receivables for drip irrigation companies have skyrocketed
 - scores of commoditized players have entered the market
- In light of changing circumstances, GAVL has decided to put its drip irrigation market entry plans on hold
 - for the time being, GAVL will focus on distributing high quality drip irrigation to our oil palm farmers across India
 - GAVL will continue to monitor drip irrigation industry conditions, keeping an open mind regarding future market entry

GAVL AGRI INPUTS CROSSES RS 200 CRORE IN SALES

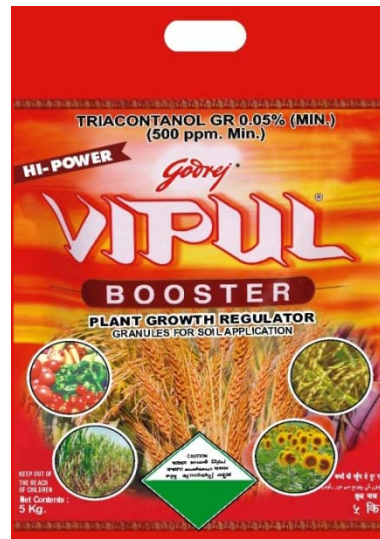
Annual Agri Inputs Sales (₹ crore)



- Agri Inputs Sales increased by 32.0% since FY2010-11
- Total Hitweed sales reached 139 KL vs. 71 KL in FY2010-11
- Capital employed brought down significantly through better trade management
- New product pipeline on track for FY2012-13 launches

STRATEGIC PRIORITIES FOR AGRI INPUTS BUSINESS

- Driving sales growth through Hitweed, Zymegold, and HBR
- Scouting for technical partnership to secure next generation products
- Registering new paddy herbicide and preparing for commercial launch
- Increasing salience of high-margin traded pesticides
- Reducing high working capital requirements through channel management
- Accelerating R&D program with strong focus on herbicide synthesis

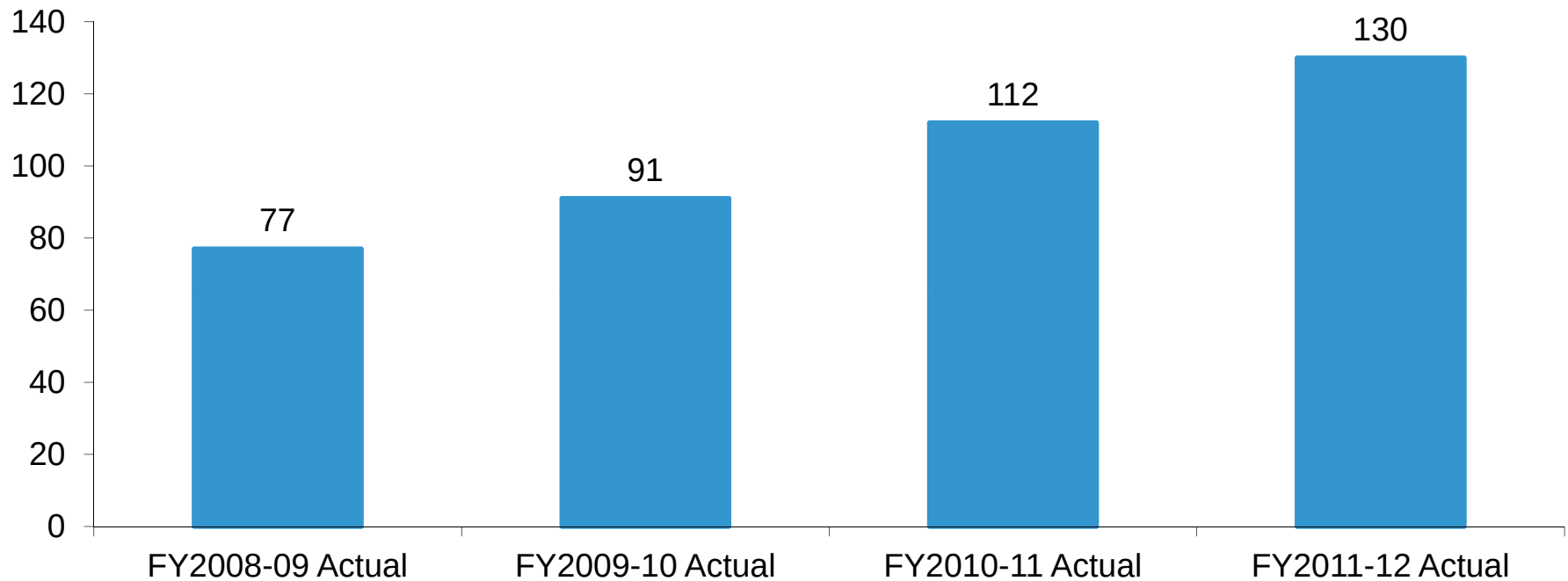


GODREJ SEEDS STRATEGY FOR INITIAL MARKET ENTRY

- Focusing on three core crops; product mix will keep trade interested
 - maize
 - paddy
 - bajra
- Building sales team covering highest potential states
 - resources prioritized to Maharashtra, Bihar, Karnataka, AP
- Investing in R&D, breeding capabilities to create long term differentiation
 - targeting FY2015-16 launch of new bajra hybrids
 - planning for R&D in new fodder hybrids for dairy cattle nutrition

GODREJ TYSON FOCUSING STRONGLY ON YUMMIEZ

Annual Godrej Tyson Sales (₹ crore) *



- Godrej Tyson Sales increased by 16.2% since FY2010-11
- Yummiez sales volumes increased by 35.7% since FY2010-11
- Launched new Yummiez products (e.g. shammi kebab, tikkas)
- Planning to expand existing plant processing capacity this year





THANK YOU FOR YOUR TIME AND CONSIDERATION