



## RALLIS INDIA LIMITED

February 27, 2025

BSE Limited  
Phiroze Jeejeebhoy Towers  
Dalal Street  
Mumbai – 400 001  
Scrip Code: 500355

National Stock Exchange of India Limited  
Exchange Plaza  
Bandra-Kurla Complex Bandra (E)  
Mumbai – 400 051  
Symbol: RALLIS

Dear Sir/Madam,

**Sub: Submission of Analysts/Investors Presentation**

**Ref: Letter dated January 24, 2025 informing about Analysts/Investors Call**

With reference to the aforesaid letter, we enclose herewith the presentation to be made at the 'IIFL's 16th Enterprising India Global Investors' Conference' scheduled to be held today i.e. Thursday, February 27, 2025.

The presentation is being submitted in compliance with Regulation 30 read with Schedule III Part A Para A of the Securities and Exchange Board of India (Listing Obligations and Disclosure Requirements) Regulations, 2015.

A copy of the presentation is also being uploaded on the Company's website at [www.rallis.com](http://www.rallis.com).

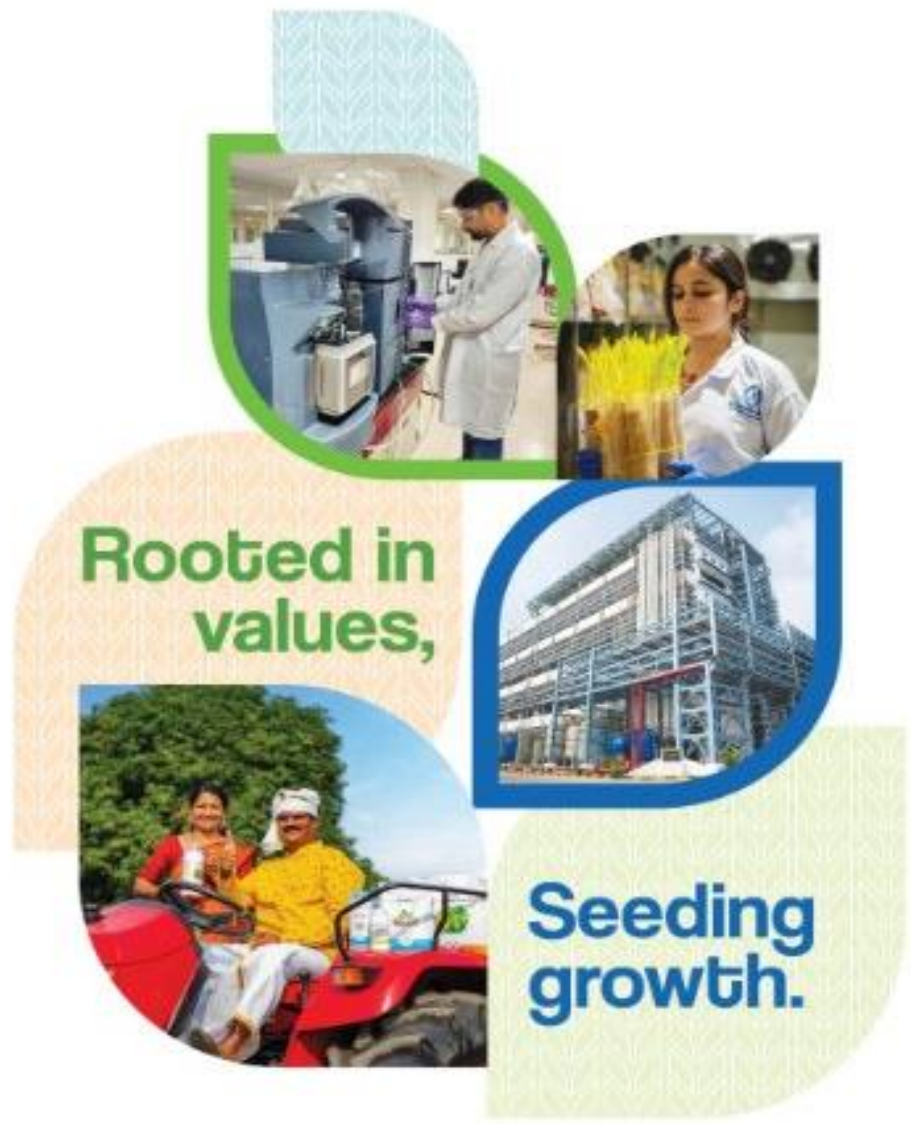
You are requested to take the same on record.

Thanking you,

**Yours faithfully,  
For Rallis India Limited**

**Srikant Nair  
Company Secretary & Compliance Officer**

Encl: As above



SERVING FARMERS THROUGH SCIENCE



**RALLIS INDIA LIMITED**  
A **TATA** Enterprise

**Dr. Gyanendra Shukla, MD & CEO**  
**27<sup>th</sup> February 2025**

R A L L I S

# Declaration

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Information shared in this document is as per our internal analysis based on publicly available information and is meant only to share general insights about agriculture and associated industries to the intended audience only.

This presentation should not be used for any other purpose without prior written consent from an authorized representative of Rallis India Limited.

# Agri Sector Growth: Domestic & Global Insights

## ✓ Global Trends:

- Precision farming, AI-driven analytics, vertical farming
- Sustainable practices, organic farming adoption
- Increasing investment in agri-tech and biotech

## ✓ Indian Agri:

- Adoption of hybrid and high-yielding seeds
- Mechanization and digital integration (IoT, AI, drones)
- Increasing export potential in fruits, vegetables, and processed foods

## ✓ Challenges:

- Climate variability affecting crop yields
- High input costs (fertilizers, seeds, agrochemicals)
- Land fragmentation reducing scalability

# Government's Perspective on Agriculture

## ✓ Policy Objectives:

- **Food Security:** Strengthening soil health
- **Farmer Welfare:** Doubling farm income
- **Technology Adoption:** Boosting AI, IoT, agri-startups

## ✓ Key Government Initiatives:

- **PM-KISAN:** Direct income support
- **PM Fasal Bima Yojana:** Crop insurance
- **Agri Infrastructure Fund:** Investment in storage, processing
- **National Mission on Sustainable Agriculture:** Climate-resilient farming

## Govt. & Private Initiatives - Benefits & Roadblocks

### ✓ Govt Initiatives:

- Seed certification programs ensuring quality
- Subsidies for high-yielding seed varieties
- Expansion of eNAM for better price discovery

### ✓ Private Sector Contributions:

- Agri-tech startups using AI for precision farming
- Expansion of contract farming
- Increased investment in biotech-driven seed innovations

### ✓ Challenges:

- High cost of seed R&D and regulatory approvals
- Limited awareness and training for farmers
- Infrastructure bottlenecks in rural areas

# Export Market Challenges - China Impact

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- Dependence on China for agrochemicals and raw materials
- Trade restrictions and tariff policies
- Global supply chain disruptions affecting exports
- Immediate supply disruptions and rising costs in the short term
- Need to develop alternative sources and local production in the long term
- Africa, Middle East, and ASEAN (Association of Southeast Asian Nations) countries as emerging export destinations
- Strengthening trade agreements with Europe and the US

# New Initiatives & Opportunities in Seeds

## ✓ **Biotech & Genetic Advancements:**

- Climate-resilient, drought-resistant seed varieties
- CRISPR and gene-editing for better crop traits

## ✓ **Agri-Tech & AI Integration:**

- AI-driven seed selection improving productivity
- Blockchain for seed traceability and quality assurance

## ✓ **Sustainable & Organic Seed Growth:**

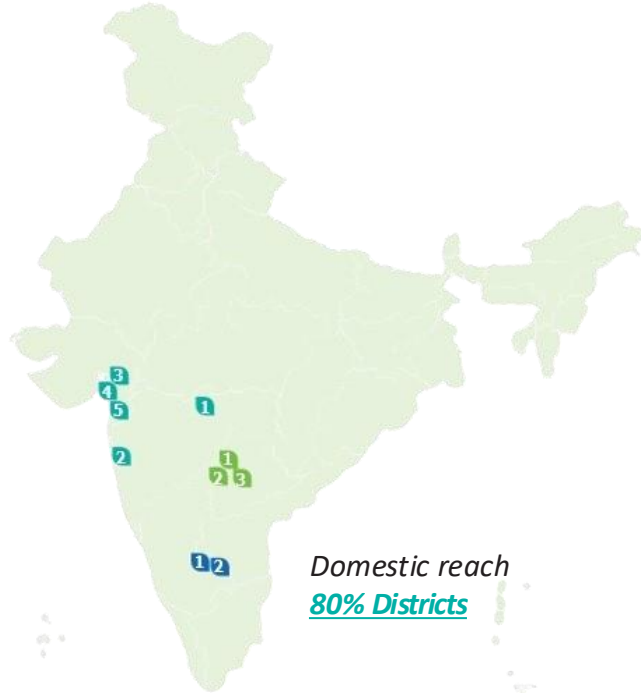
- Rising demand for organic and bio-seeds
- Government push for sustainable and eco-friendly agriculture

## ✓ **Private Investment & Startups:**

- Increasing R&D investments in hybrid and GM crops
- Digital platforms for precision farming solutions

# Rallis Overview

## Operations



Domestic reach  
**80% Districts**



Global access  
**70+ Countries**

### ■ Crop care: Manufacturing Facilities

1. Akola
2. Lote
3. Ankleshwar
4. Dahej Special Economic Zone (SEZ)
5. Dahej Chemical Zone (CZ)
6. Third Party Facilities (TPF): 9 nos.

### ■ Seeds: Drying, Processing and Packaging Plants

1. GP Pally (TPF)
2. Kokkonda
3. Medchal (TPF)

TPF: Third Party Facilities

### ■ Innovation Centres

1. Rallis Innovation Chemistry Hub (RICH), Bengaluru
2. Agri-Biotech Centre, Bengaluru

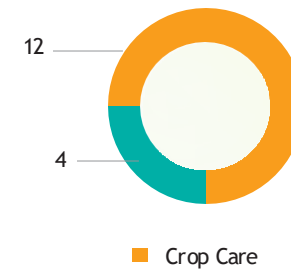


## Comprehensive presence in Agri-input business

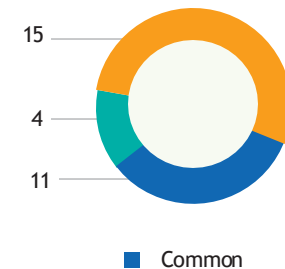
	Crop Care	Seeds
Businesses	Crop Protection, Biologicals & Specialty solutions	Focused Crops
Domestic Presence	B2C (Domestic Brand) and B2B	B2C (Domestic Brand)
Exports	Catalogue products and CSM	No presence
No. of Customers	Brand: 4,975; DIB: 45+; Exports: 75+	Brand: 2,765
No. of Farmers Connected with	~3 million	~4 million

DIB: Domestic Institutional Business; CSM: Custom Synthesis and Manufacturing

REGIONAL OFFICES (nos.)



DEPOTS (nos.)



Serving Farmers through Science



# Long Term Strategy

## CROP CARE

Crop Protection,  
Biologicals & Specialty Solutions







## SEEDS



Focused Crops







### OVERALL:

-  **WIDEN REACH, EXTEND PORTFOLIO OFFERINGS –GROW HERBICIDES**
-  **TARGETED R&D INVESTMENTS**
-  **DIGITAL / DATA DRIVEN ORGANIZATION CULTURE**
-  **FOCUS ON COST COMPETITIVENESS**

### B2B (Domestic, Exports, CSM):

-  **BUILD STRATEGIC ALLIANCES**
-  **INTENSIFY CUSTOM SYNTHESIS MANUFACTURING**

### B2C (Domestic Brand):

-  **CAPTURE UNDERSERVED CROP PROTECTION SEGMENTS**
-  **ENHANCED FOCUS ON BIOLOGICALS & SPECIALITY SOLUTIONS**
-  **PLUG PORTFOLIO GAPS IN MAIZE, PADDY**
-  **EXTEND NORTH COTTON SUCCESS TO OTHER MARKETS**

Customer Centricity. Leveraging Digital, Collaborations and Alliances

# Rallis - Manufacturing Units



**Ankleshwar**



**Lote**



**Dahej SEZ**



**Akola**



**Dahej CZ**



# Rallis - Key Brands

## Crop Protection



## Biological & Specialty Solutions



## Seeds



# Rallis - Digital Initiatives



SEED SURE



SEED SAY

# Rallis - Awards & Recognition

Rallis honored with the '*Treasure Tech Innovation Initiative of the Year*' award at the 12th Edition of the CFO Vision & Innovation Awards!



Rallis honored with the *Best Safety Performance Award* for its commitment to safety and excellence!



Rallis's 'Jal Dhan' recognized as the *Best Water Conservation Initiative* at the 4th Edition of the ESG Summit!



Rallis Dahej SEZ Plant wins the prestigious *FICCI Award* for excellence in Water Management!



Rallis wins *2nd Prize* at the *iNNCOTECH Awards* for the project '*Driving Sustainable Efficiency – Continuous Operation (Nitrification)*' & *Best Safety Performance*!



Rallis wins *Significant Adoption Award* from TATA Group Chairman Mr. N Chandrasekaran for 500+ TAAP score & *Essential Enablers Award* for Best in Class!



