

Indian macro-environment drivers

- ▶ 100 percent growth in the demand for speciality fertilisers (chief use for fruits and vegetables)
- ▶ 28 percent contribution of horticultural crops to the agri-GDP
- ▶ 35 percent is the proportion of horticultural exports to the total agri-exports
- ▶ 10 million tonnes is projected shortfall of urea in 2010-11
- ▶ 6.5 percent is the projected growth in the mining and quarrying sector in 2009-10
- ▶ 467 million tonnes is the projected coal production in 2008-09, doubling in 8-10 years
- ▶ Rs. 254 billion is the projected investment in road transport and infrastructure projects over 2009-10
- ▶ 6 percent is the current growth in per capita income; projected growth of 9 percent
- ▶ Projected 12 percent CAGR for the Indian pharmaceutical sector over the next five years

Our strategic focus areas

- ▶ DFPCL is among the few Indian fertiliser manufacturers that is now forward integrating successfully into comprehensive farm solutions and output management
- ▶ DFPCL is enhancing strategic international presence through exports of agri-products and Technical Ammonium Nitrate
- ▶ DFPCL is India's only manufacturer of porous Prilled Technical Ammonium Nitrate and is creating new capacity in order to exploit emerging market opportunity in the mining sector
- ▶ DFPCL provides top-class chemicals for the high quality, growing needs of the pharma sector
- ▶ DFPCL has created India's largest design centre and specialty mall, Ishanya, focused on catering to the most comprehensive residential / commercial real estate needs taking advantage of the burgeoning needs of the Indian middle and upper middle class

Our recent business initiatives

- ▶ Recently completed retrofitting of the Ammonia plant to raise the overall capacity to 125,400 MTPA
- ▶ Completed the 15,000 MTPA Ammonia tank at JNPT to create an efficient make-or-buy option, thereby ensuring maximum feedstock assurance
- ▶ Commissioned the 25,000 TPA Sulphur Bentonite plant (speciality fertiliser)
- ▶ Agri-services strategy initiated based on four pillars: 1) strong Agronomy; 2) customised fertiliser manufacture; 3) direct farmer contact through retail chain 4) produce procurement comprising fresh fruits and vegetables catering to retail and food processing sectors in India and abroad
- ▶ Within a short period, Mahadhan Saarthie farmer membership increased to 5,500 members
- ▶ Focus on India's emerging consumption pattern and the retail surge through Ishanya, India's largest design centre and specialty mall, with a scale of 5.5 lakh sq. ft. Ishanya is currently home to over 5,000 brands and over 50 retail outlets