



AN OVERVIEW

Apollo at a Glance



Leading Global Tyre Company

- Presence across India, Europe & other growing economies of Asia
- Delivered above industry growth of 18% as the company posted a consolidated revenue of ₹ 17,273 crores in FY2019

Manufacturing Across 2 Continents

- Manufacturing presence in Asia & Europe

Mix of Global & Regional Brands



Extensive Distribution Network

- ~6,200 retail dealers in India
- ~3,550 dealer outlets in Europe

Leading Tyre Manufacturer in India, Balanced Product Portfolio

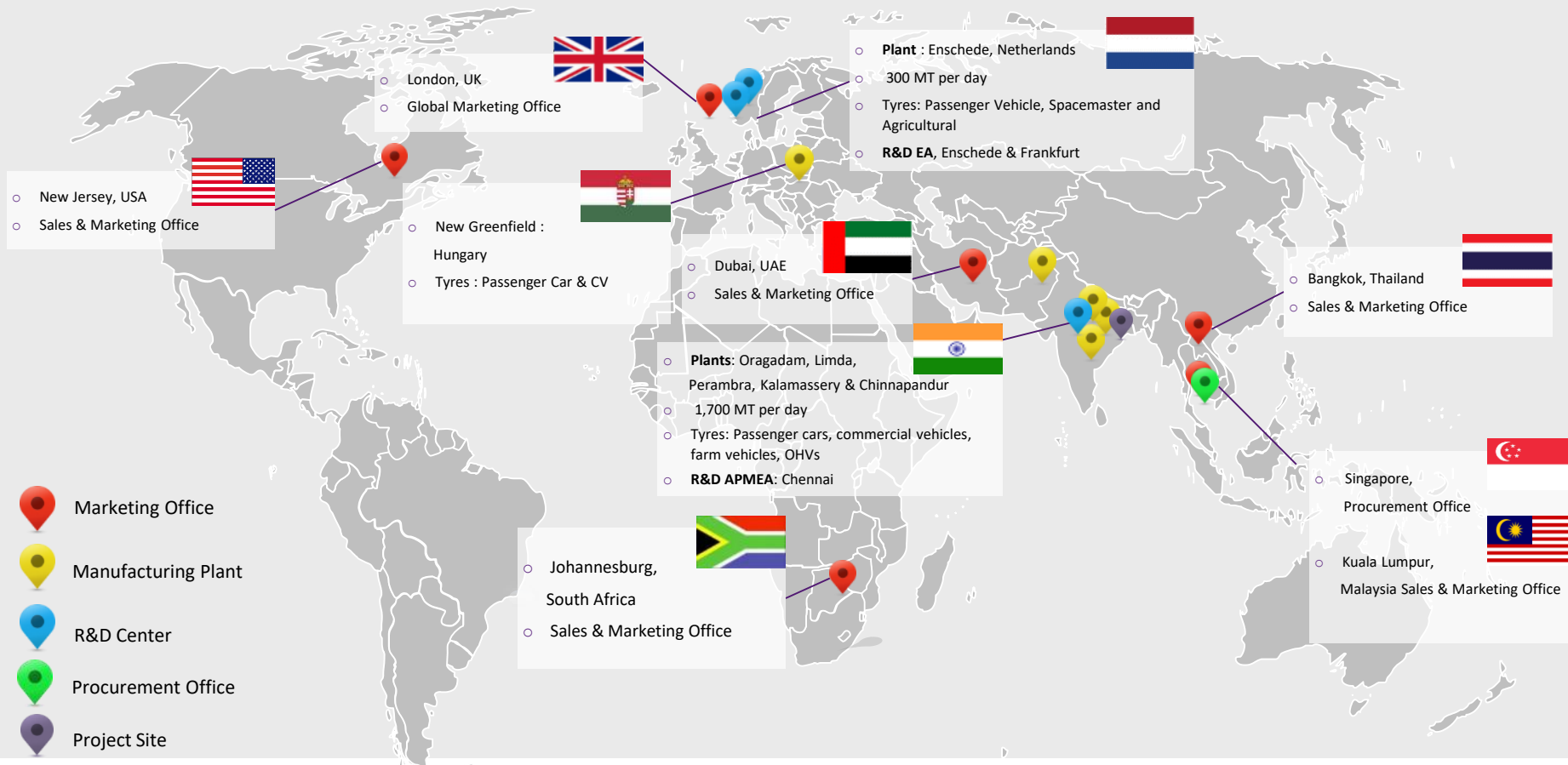
- Introduced multiple initiatives to ramp up Company's product portfolio
- Roped in Sachin Tendulkar as the company's brand ambassador
- Became the first tyre company in India to introduce a range of fuel-efficient tyres in FY2019 highlighting the role played by R&D team in creating first-to-market products
- Maintained leadership position in the CV tyre segment and built on the dominant position in the overall TBR market
- Doubled Apollo CV zones to 50 along with the expansion of Apollo Retread Zones
- Introduced SUV tyres—Apterra OWL (Outward White Lettering)—with white lettering on the sidewall
- Launched Apollo Alpha—'India's first zero degree steel-belted motorcycle radial tyre'
- Became the exclusive supplier to Tata Motors' Ultra-electric buses.



Apollo at a Glance



Sales To More Than 100 Countries Worldwide



Global presence in line with the company's vision of being a significant global player

Management Board



Onkar S Kanwar
Chairman & Managing Director



Neeraj Kanwar
Vice Chairman & Managing Director



Sunam Sarkar
President & Chief Business Officer



Gaurav Kumar
Chief Financial Officer



K Prabhakar
Chief, Projects



Robert Steinmetz
Director



Satish Sharma
President, APMEA



Benoit Rivallant President,
Europe



P K Mohamed
Chief Advisor, R&D



Francesco Gori
Director



Pedro Matos
Chief Quality Officer



Markus J Korsten
Chief Manufacturing Officer



Daniele Lorenzetti
Chief Technology Office

Highly experienced team with average tenure of over 10 years in Apollo Tyres

VISION

To be a premium tyre company with a diversified and multinational presence



VALUES

- Customer First
- Business Ethics
- Care for Society
- Empowerment
- One Family
- Communicate Openly

Key Milestones



First Plant in
Perambra, Kerala

1977

Second Plant in
Limda, Gujarat

1991

1995

Acquired plant in
Kalamassery, Kerala

2006

Acquired Dunlop
Tyres, South Africa

2009

Acquired Vredestein
Banden BV, Netherlands

All Radial Plant in
Oragadam, Tamil Nadu

2010

2011

Sales & Marketing
Office, Dubai

2013

- Sales & Marketing Office, Thailand
- Global R&D Center Europe, Netherlands
- Global Marketing Office in London, UK
- Partnered with Manchester United

2014

Global R&D
Center Asia, India

2015

- Acquired Reifencor German Tyre Distribution company
- Laid the foundation stone for the Hungary Greenfield Plant
- Global Procurement Office, Singapore

2016

- Launched two-wheeler tyres in India
- Sales & Marketing Office, Malaysia

- Inaugurated the Hungary Plant
- TBR Launch in Europe

2017

2018

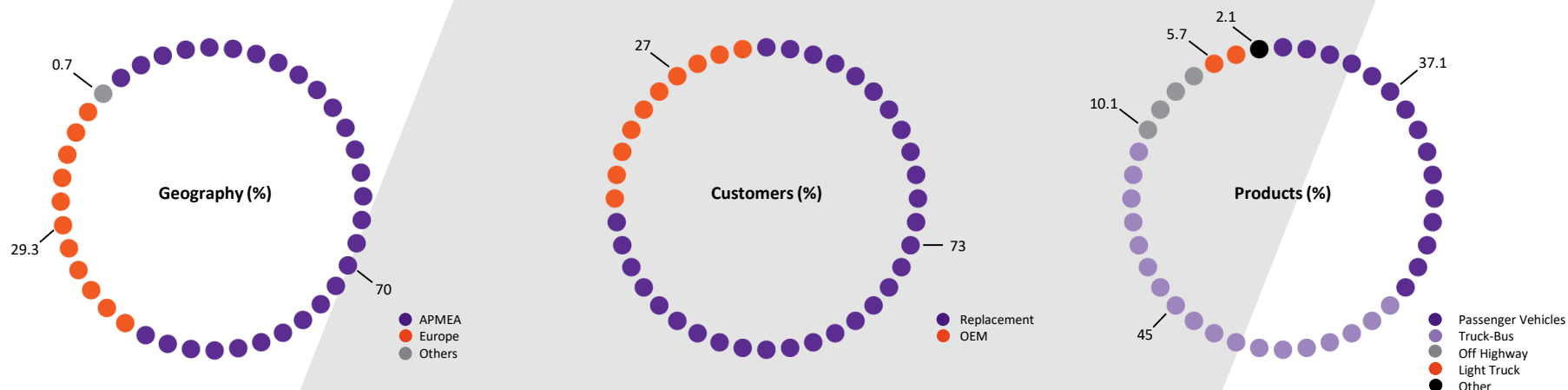
Laid the foundation stone for the company's seventh manufacturing facility in Andhra Pradesh

Apollo's growth has been driven by a well thought strategy of organic and inorganic initiatives

Key Performance Indicators



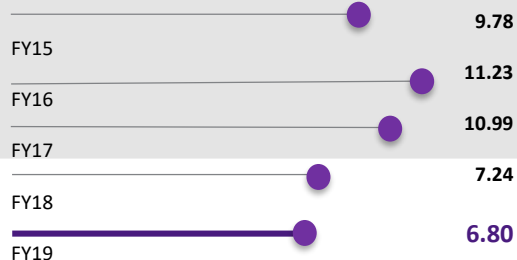
Revenue Segmentation



Gross Sales (₹Bn)



Net Profit (₹Bn)



Capital Expenditure (₹Bn)



Product Categories

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TYRES

Passenger Cars



Trucks



OHT



Farm





Two Wheelers



Brand Strategy



Well Positioned Multi-brand Strategy Across Different Segments

Pricing Segment	Brand	Brand Positioning	Passenger Car Tyres		Commercial Vehicle Tyres	Off Highway Tyres	Two Wheeler Tyres	Bicycle Tyres
			UHP & Winter Tyres	All Season & Summer Tyres				
Top		Global Niche Premium	✓	✓		✓	✓	✓
Medium		Global	✓	✓	✓	✓	✓	

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GO THE ————— DISTANCE

- Formed a branding tie-up with Manchester United Football Club in 2013
- Starting with a few European countries, the company now has a global partnership with the football club

Technology

- Focus on New Product Development to grow market share
- Research of new transportation solutions with lowest possible impact on environment
- Partnered with various technical bodies, universities & OEM partners across the world

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TYRES

Commercial
Vehicle (CV)
R&D Centre,
Chennai, India

- Developed market leading brands in truck radial & cross-ply categories for India
- Developed superior compounds for Mileage, Rolling Resistance & cut chip resistance
- Launched the new XMR with LiveBond Steer mile technology in India: We believe it offers customers lower cost of ownership & more total tyre life



Passenger
Vehicle (PV)
R&D Centre,
Enschede,
Netherlands

- Proven history of manufacturing expertise & innovation
- Developed 'Spacemaster', a collapsible spare tyre for high end cars
- Launched the variable front spoiler made with a specially developed EPDM rubber for the European market that we believe helps in improving high speed handling & fuel efficiency
- Focus on sustainable material research: Development of the production chain of natural rubber & Inulin from Russian dandelions & use of reprocessed material as a replacement for natural rubber



Innovative and Winning Products

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TYRES

TEST WINNER!



SPORTRAC 5

ADAC
REKOMENDATION
Sommer 2015
www.adac.de

gnt test
Sommer 2015
www.gnt-test.de

GAMTC TEST
Sommer 2015
www.gamtc-test.de

"Very balanced summer tyre,
best tyre for wet roads."

"A very balanced tyre."

"Best tyre on wet, very
good on dry roads."




INTRODUCING
**APOLLO
AMAZER 461**
Performs up to 1,00,000 km*

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IN THE DISTANCE

QUATRAC 5



allrad
TESTSIEGER 2015
WIEDESTEN
Quatrac 5
Apollo 01/2015
Getriebene All-Range 185er
200 x 110 R 18

Auto Bild
09/2015
Quatrac 5
195/65R15 H
Empfehlenswert

India



Extensive Distribution Network in India

- 6,200 (incl. ~2,300 exclusive retail dealers)
- 143 sales offices including regional and area offices
- 17 Regional distribution centers servicing 143 stocking points
- Wide specialist network: Apollo Super Zone, Apollo Zone, Apollo CV Zone, Apollo Farm Zone, Apollo Point

EUROPE



Distribution Network across Europe

- ~3,550 third party dealers in Europe
- 13 European National Sales Offices with sales personnel and warehouses
- Further enhanced presence through acquisition of Reifencom which operates across 6 countries in Europe and has 37 stores in Germany

Key Partnerships



Customers



Testing Facilities



* This is only a representative listing and not comprehensive in any manner

Awards & Recognitions



Leadership



Onkar Kanwar - Ernst & Young
'Entrepreneur of the Year - Manufacturing'



Onkar S Kanwar awarded with the Officers Cross (Civilian
Division) of the 'Order of Merit' of Hungary

Awards & Recognitions



Customer Services



Excellence in Customer Delight Award -
Hyundai Motors India



Mahindra Supplier Excellence Award

Awards & Recognitions



Human Resources

India's Best Companies
To Work For 2018
THE ECONOMIC TIMES



India's Best Companies to Work for 2018

CSR



- Asia Responsible Entrepreneurship Award for HIV-AIDS initiative
- Global Sustainability Leadership Awards 2014
- Asian CSR Awards for Health Enhancement Category 2015

Awards & Recognitions



Manufacturing



Tire Manufacturer of the Year, by Tire Technology International

Legal



ICSI National Award
Excellence in Corporate Governance

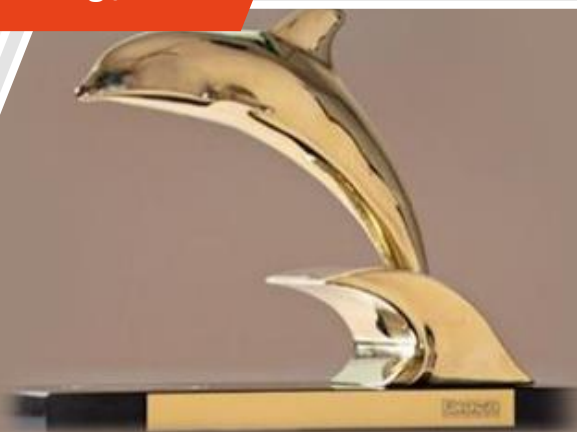
Awards & Recognitions

Marketing / PR



Cannes: Silver Lion for 'Adopt a Pothole'

Marketing / PR



- Cannes: Golden Dolphin for Marketing Communication



Thank You

