

**Borosil Limited**

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August 18, 2025

BSE Limited Phiroze Jeejeebhoy Towers, Dalal Street, Mumbai - 400 001 Scrip Code: 543212	National Stock Exchange of India Limited Exchange Plaza, C-1, Block - G, Bandra Kurla Complex, Bandra (East), Mumbai - 400 051 Symbol: BOROLTD
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Dear Sirs,

Sub: Investor presentation

Pursuant to Regulation 30 of the Securities and Exchange Board of India (Listing Obligations and Disclosure Requirements) Regulations, 2015, please find enclosed a Presentation on the performance of the Company for the quarter ended June 30, 2025.

The said presentation is also being uploaded on the Company's website at www.borosil.com.

Thanking you.

Yours faithfully,
For **Borosil Limited**

Suresh Savaliya
Company Secretary & Compliance Officer

Encl.: as above



Safe Harbour

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The material that follows is a Presentation of general background information about the Company’s activities as at the date of the Presentation or as otherwise indicated. It is information given in summary form and does not purport to be complete and it cannot be guaranteed that such information is true and accurate. This Presentation has been prepared by and is the sole responsibility of the Company. By accessing this Presentation, you are agreeing to be bound by the trading restrictions. It is for general information purposes only and should not be considered as a recommendation that any investor should subscribe to or purchase the Company’s equity shares or other securities.

This Presentation includes statements that are, or may be deemed to be, “forward-looking statements”. These forward-looking statements can be identified by the use of forward-looking terminology, including the terms “believes”, “estimates”, “anticipates”, “projects”, “expects”, “intends”, “may”, “will”, “seeks” or “should” or, in each case, their negative or other variations or comparable terminology, or by discussions of strategy, plans, aims, objectives, goals, future events or intentions. These forward-looking statements include all matters that are not historical facts. They appear in a number of places throughout this Presentation and include statements regarding the Company’s intentions, beliefs or current expectations concerning, amongst other things, its results or operations, financial condition, liquidity, prospects, growth, strategies and the industry in which the Company operates. By their nature, forward-looking statements involve risks and uncertainties because they relate to events and depend on circumstances that may or may not occur in the future. The factors which may affect the results contemplated by the forward looking statements could include, among others, future changes or developments in (i) the Group’s business, (ii) the Group’s regulatory and competitive environment, and (iii) political, economic, legal and social conditions in India or the jurisdictions in which our Group operates. Forward-looking statements are not guarantees of future performance including those relating to general business plans and strategy of the Company, its future outlook and growth prospects, and future developments in its businesses and its competitive and regulatory environment. No representation, warranty or undertaking, express or implied, is made or assurance given that such statements, views, projections or forecasts, if any, are correct or that the objectives of the Company will be achieved.

There are some important factors that could cause material differences to Company’s actual results. These include (i) our ability to successfully implement our strategy (ii) our growth and expansion plans (iii) changes in regulatory norms applicable to the Company (iv) technological changes (v) investment income (vi) cash flow projections etc. The Company, as such, makes no representation or warranty, express or implied, as to, and does not accept any responsibility or liability with respect to, the fairness, accuracy, completeness or correctness of any information or opinions contained herein. The information contained in this Presentation, unless otherwise specified is only current as of the date of this Presentation. The Company assumes no responsibility to publicly amend, modify or revise any forward-looking statements, on the basis of any subsequent development, information or events, or otherwise. Unless otherwise stated in this Presentation, the information contained herein is based on management information and estimates. The information contained herein is subject to change without notice and past performance is not indicative of future results. The Company may alter, modify or otherwise change in any manner the content of this Presentation without obligation to notify any person of such revision or changes.

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About Borosil



Brand with a
60+ year
legacy



Enjoys strong consumer
equity in serving-ware,
kitchen appliance
and storage



One of the leading
brands in glass
microwavables
&
Largest Opalware
Player in India

Our Vision

‘To Be The Most Customer-Centric Company in India’

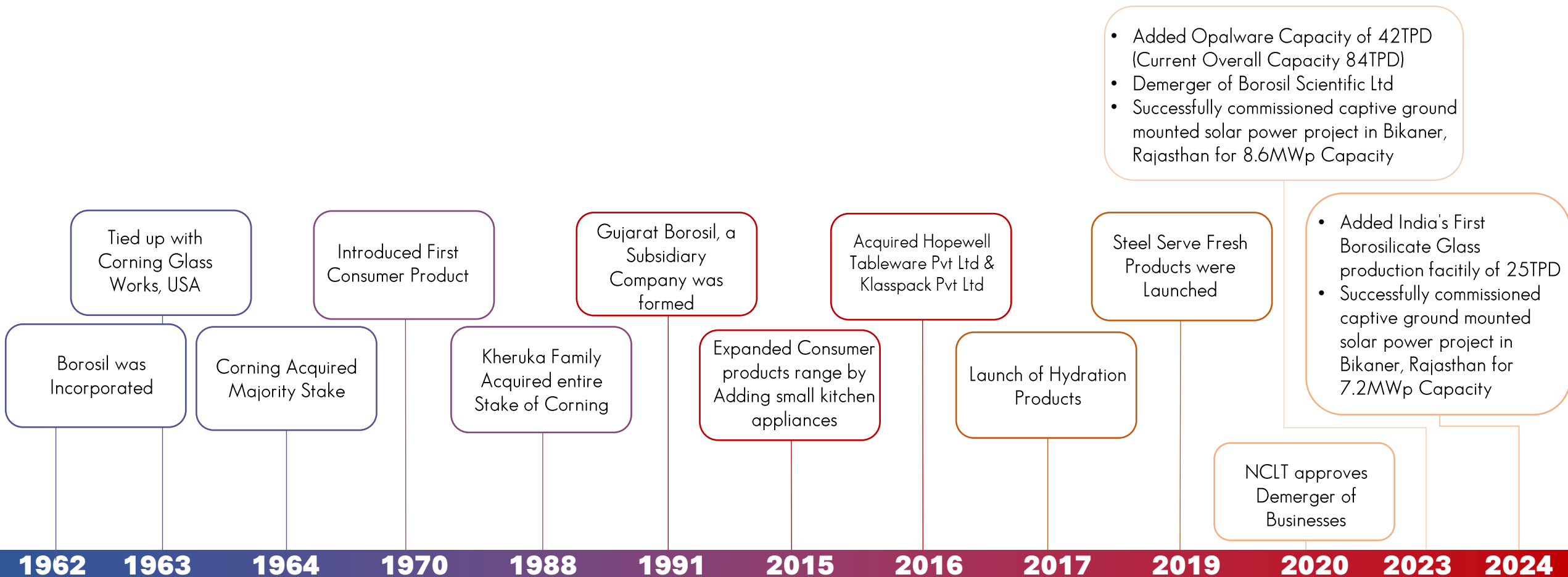
Develop innovative products to meet evolving customer needs

Be a dependable partner that creates value for customers

Nurture long-term relationships with all stakeholders

Company Timeline

60+ Years Of Excellence, With Consistent Accomplishments



Key Highlights

24000+

Presence in Retail Outlets

26

Presence in Countries

18000+

SKUs

2

Opal Glass Mfg Furnaces (84 TPD)

~250

Distributors

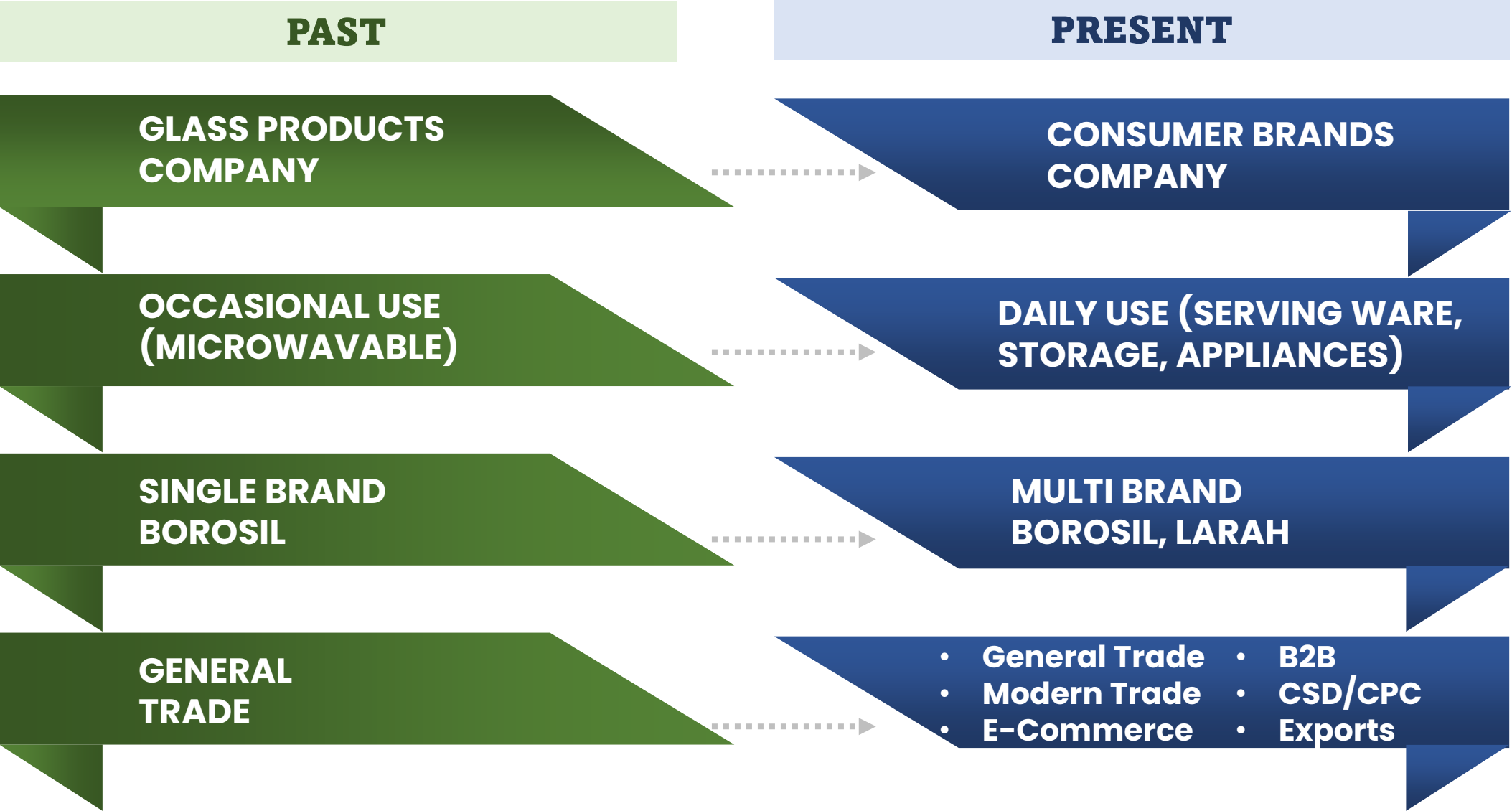
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Borosilicate Glass Mfg Furnace (25 TPD)

- **Part of Borosil Group:** Part of the esteemed Borosil Group with a track record of 60+ years.
- **Trusted Brand:** One of the oldest and most trusted brands in India
- **Larah:** One of the largest Opalware manufacturers in India
- **Borosilicate Glass Production:** Operates India's first Borosilicate Glass Production Facility
- **Institutional Investors:** Trusted by investors like DSP, Canadian World Fund, Quantum State MF and others.
- **Innovation & Technology:** Deeply committed to leveraging information and technology to drive innovation, efficiency, and growth.

- **Diverse Product Range:** Prides itself on offering a diverse product range that spans across multiple segments, catering to a wide variety of customer needs and preferences
- **In-house Development:** Strong in-house New Product Development team
- **Manufacturing Excellence:** Excellence in Opalware & Glassware manufacturing. First in various product concepts such as glass lunch boxes, Opalware lunch boxes, and the patented Spin-N-Store storage system.

Re-Imagining Consumer Products



Product Categories

Glassware



Cook, serve, store
Glassware



Jugs & Bottles



Storage Jars



Glass
Containers



Vision Glass

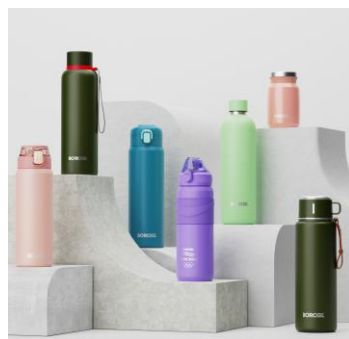


Glass Lunch Boxes

Non-Glassware



Domestic Appliances



Flasks & Bottles



Stainless Steel Cookware



Non-Stick Cookware



Gas Stoves

Opalware



Storage Containers



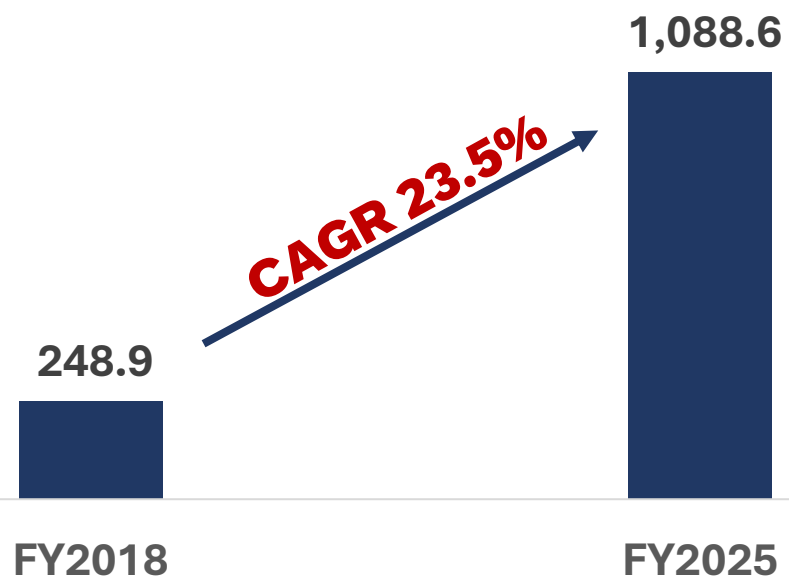
Dinner Sets

Tea & Coffee series

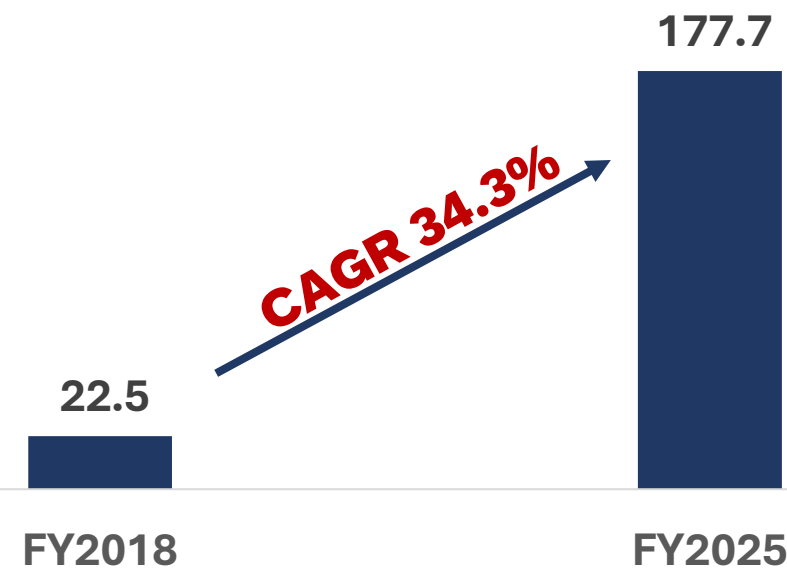


Journey over last 7 years

Sales (₹ Crs)



Operating EBITDA (₹ Crs)



Q1FY26 Consolidated Highlights

Leading the Industry in Year-on-Year EBITDA & PAT Growth

Revenues

₹ 232.7 CRS

↑ 5.2%
YoY

EBITDA

₹ 47.2 CRS

↑ 28.5%
YoY

PAT

₹ 17.4 CRS

↑ 87.4%
YoY

— Consolidated Financial Overview Q1FY26 —

Consolidated (₹ Crs)	Q1FY25	Q1FY26	Growth%	FY24	FY25	Growth%
Net Sales	216.8	226.5	4.5%	942.3	1,088.6	15.5%
Other Operating Income	4.4	6.2	40.0%	6.3	19.2	205.6%
Revenue From Operations	221.2	232.7	5.2%	948.5	1,107.8	16.8%
EBITDA	36.7	47.2	28.5%	150.5	197.1	30.9%
EBITDA (Before exceptional and one-time items)	34.6	40.2	16.1%	144.9	177.7	22.6%
EBITDA (%)	16.0%	17.8%		15.4%	16.3%	
EBIT (Before exceptional and one-time items)	15.2	18.2	19.3%	91.0	96.6	6.2%
PBT	12.9	23.5	81.6%	87.8	103.2	17.5%
PAT	9.3	17.4	87.4%	65.9	74.2	12.7%
Net Debt - period end/year end	57.8	5.1		159.4	26.5	

Note:

1. The operating EBITDA and EBIT excludes investment income of Rs.1.39 crs and one-time items of Rs. 5.56 crs for Q1FY26 as against exclusion of Rs.2.07 crs investment income in Q1FY25
2. $EBITDA\% = \frac{EBITDA \text{ (Before exceptional and one time items)}}{Net \text{ Sales}} \times 100$
3. $EBIT \text{ (Before exceptional and one-time items)} = EBITDA \text{ (Before exceptional and one-time items)} - \text{Depreciation}$
4. Other Operating Income includes Shared Services Income (with the associated expenses captured under total expenses) and Export Incentives

Category wise Sales

(₹ Crs)

Particulars (₹ Crs)	Q1FY25	Q1FY26	Growth%	FY24	FY25	Growth%
Glassware	55.7	56.2	0.9%	198.0	252.0	27.2%
Non-Glassware	85.1	94.2	10.7%	386.5	452.9	17.2%
Opalware	76.1	76.2	0.1%	357.7	383.8	7.3%
Total Consumerware	216.8	226.5	4.5%	942.3	1,088.6	15.5%



Market Opportunity



Category	Market Size Branded (₹ Crs.)	Market Growth %
Glass (Borosilicate) Includes Microwavable, Tumblers and Storage	~415	10.5 %
Tumblers (Soda lime)	~400	10 %
Cookware (Includes Cooking range of pans, cookers, kadhais etc made of steel, non-stick, cast iron, aluminium etc)	~7922	6.5 %
Insulated Steel Bottle Range	~2,000	10%
Opalware	~1,375	12%-15%
Domestic Appliances(Small)	~8,155	8.5%

Note : Source : Technopak Report and internal estimates

Channel Presence



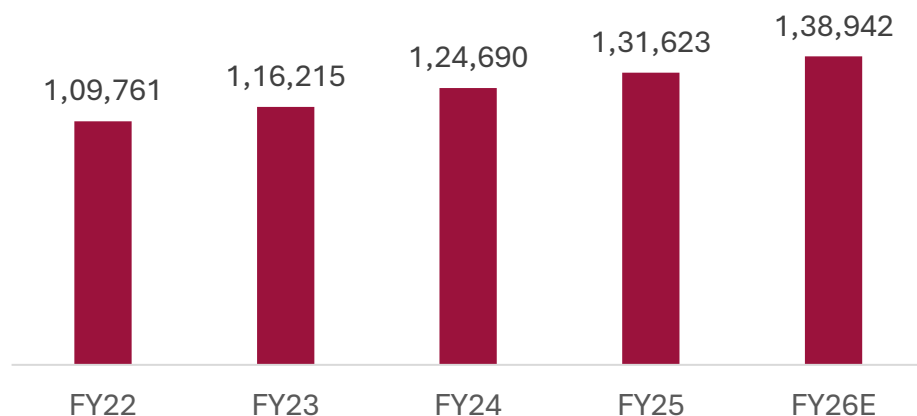
Why Borosil ?

- ✓ **Category Leader** : #1 in Opalware (Larrah)
- ✓ **Brand Stickiness** : trust built over decades, strong recall. Trusted across generations
- ✓ **Mass Premium Positioning** : bridges aspiration with affordability
- ✓ **India Consumption Play** : Rising PFCE & urban middle-class boom will benefit in long run.
- ✓ **5x Growth in Hydra Range** : tapping ₹2,000+ Cr Insulated Steel Bottle market
- ✓ **25 TPD Borosilicate Plant**: backward integration, margin accretive
- ✓ **84 TPD Opalware Capacity**: among India's largest
- ✓ **Consumption Megatrend Proxy**: plays India's next-gen kitchen, dining, and lifestyle story

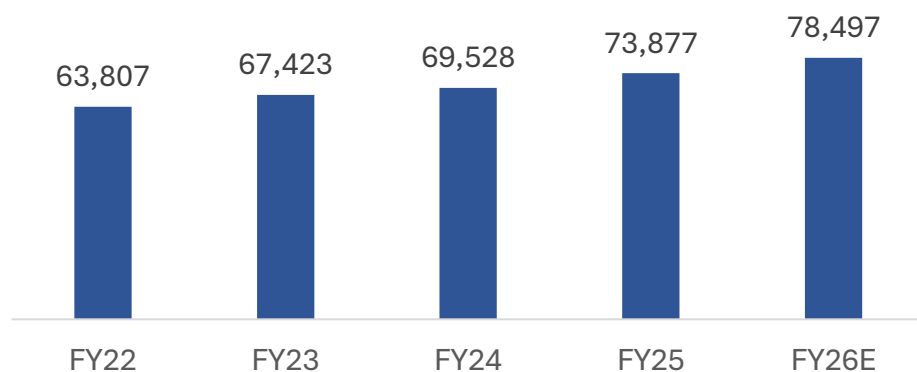
- ✓ **Plastic-to-Glass Shift** : riding health & sustainability wave
- ✓ **Distribution Reach**: Have extensive distribution footprint spanning General Trade, Modern Trade, E-commerce, B2B, CSD, and CPC
- ✓ **Make in India Manufacturing** : cost-efficient, scalable, high quality
- ✓ **High Operating Leverage** : capacity ramp-up = earnings upside and margin expansion.
- ✓ **Talent retention** through ESOPs + Innovation-driven workforce
- ✓ **Resilient Financials**: Strong Balance Sheet with steady cashflows and negligible net debt
- ✓ **Poised for Multi-Year Growth**: aligned with structural consumption tailwinds

India's GDP & PFCE growth

Per Capita GDP (₹)



Per Capita PFCE (₹)

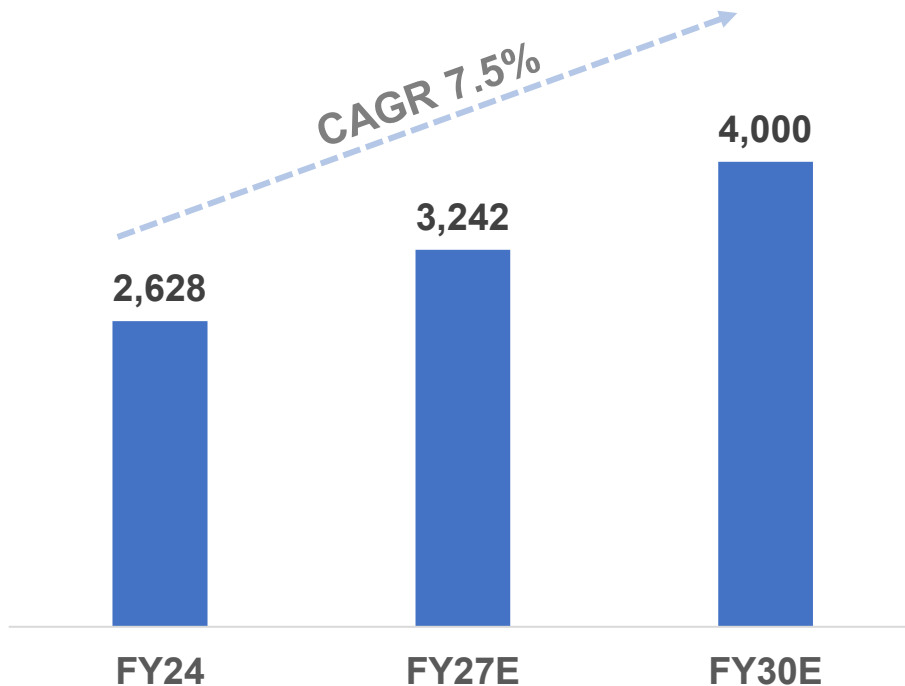


“With India’s per capita consumption on the rise, the demand for premium yet affordable kitchenware, storage, hydration, and serveware is poised for rapid growth propelling Borosil’s core growth engines.”

Rising Disposable Incomes & Discretionary Spend

A Strong Tailwind for Borosil

India's per capita income (\$)

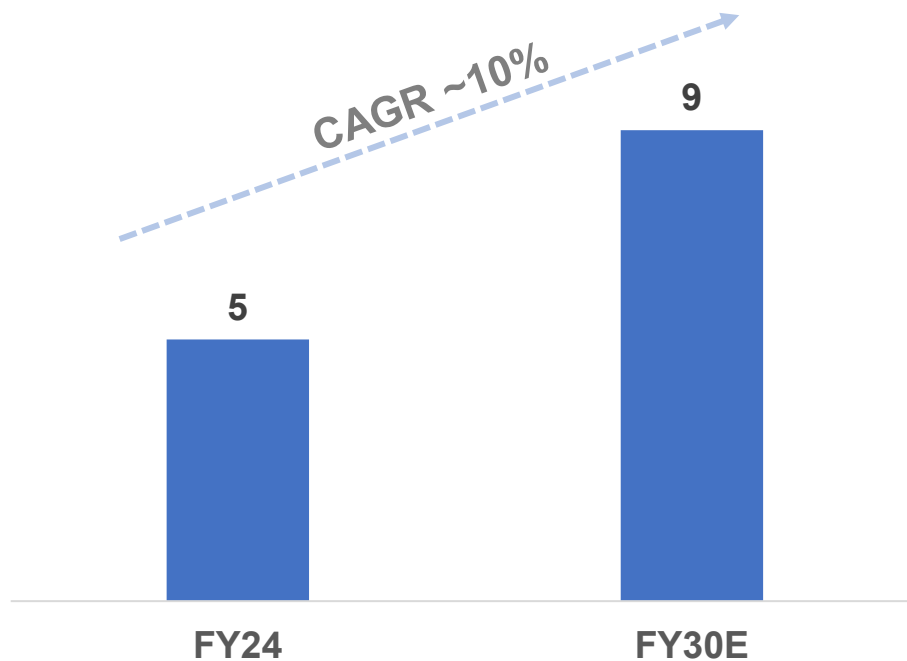


- With GDP per capita expected **to grow at 7.5% CAGR** during FY2024– 2030, this strong upward trend in purchasing power creates a favourable environment for consumer-driven growth
- India's per capita income **to reach \$4,000** by FY30, thereby creating an ideal environment for boosting consumerware & kitchenware demand
- Discretionary spending set to grow at **8.7% CAGR by FY30**, expanding opportunity for consumerware and kitchenware products
- Food share in household spend dropping; wallet share shifting to durables, appliances, lifestyle products

—— Brown Goods Boom – Fueling Demand in the long run ——

Brown Goods include microwave oven, kitchen appliances, home appliances, and personal care appliances

Size of Brown Goods (\$ Bn)



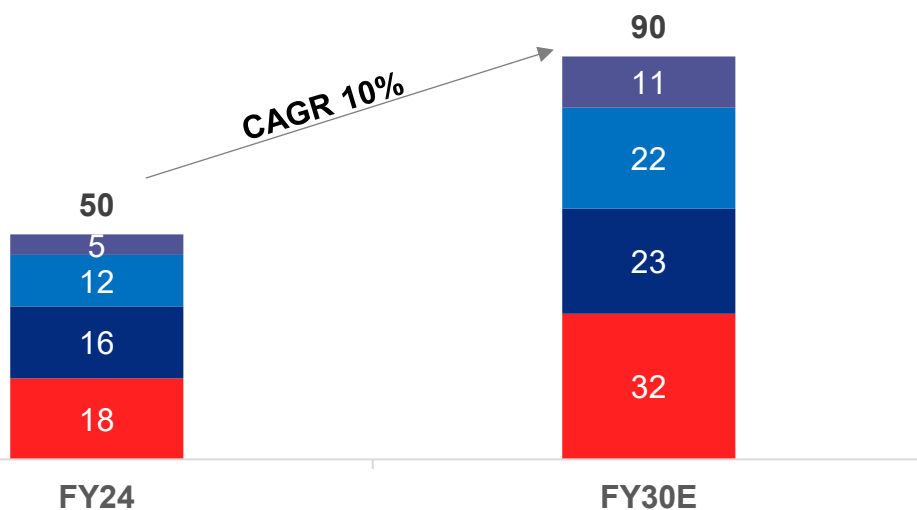
- The brown goods market in India is expected to grow from \$5 billion in FY24 to \$9 billion by FY30, implying a CAGR of ~10%.
- Rising demand for kitchen-centric appliances such as microwaves, choppers, mixers, grinders, and toasters.
- Growth driven by urbanisation, premiumisation, lifestyle upgrades, and online retail access, all directly relevant to Borosil's product portfolio.

Rise of Health-Conscious India – Driving Demand for Steel, Glassware & Opalware

“Rising spend on nutrition, health and fitness directly correlates to awareness towards leading a healthy life which would have effects on choices of adopting safer food & drink practices, where steel, glassware & Opalware would be preferred over plastic.”

Size of the Indian health and wellness market (in US\$ Bn)

■ Nutrition ■ Beauty & Personal Care ■ Fitness ■ Mindfulness



Source: India's changing discretionary spending: RAI & Deloitte, Industry view

Health Awareness on the Rise

- Indians have become more aware and have increased spending on nutrition, health and fitness
- Strong consumer shift towards nutrition, hydration, and toxin-free lifestyles

Plastic Rejection Accelerating

- Growing concerns around BPA, microplastics, and endocrine disruptors
- Urban millennials and Gen Z avoiding plastic in food/beverage use
- Single-use plastic bans and sustainability concerns pushing demand for alternatives

The shift to steel, glassware and opalware is gradual but inevitable, driven by rising demand for safer, healthier, and premium alternatives.

Make in India – Strengthening Domestic Manufacturing for Scalable Growth

Borosil is investing in future-ready capacity — built in India, for India and the world.

- **Established Leadership in Opalware & Borosilicate Glassware Manufacturing:**

- Operates 84 TPD Opalware Furnaces – among the largest in India
- 25 TPD Borosilicate Glassware Furnace commissioned in Mar'24
- Manufacturing premium Borosilicate & Opalware microwave-safe products under Borosil & Larah brand
- Scale enables cost-efficiency, consistent quality, and faster market response.

84 TPD

Opalware

25 TPD

Borosilicate Glassware

- **Expanding Manufacturing**

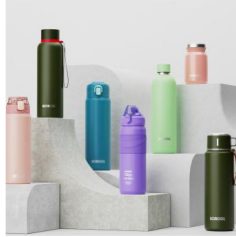
- New facility to manufacture Vacuum-insulated stainless steel bottles, flasks, and containers in Rajasthan
- Estimated initial capex: ₹40 crore
- Initial capacity: ~2.4 million units annually
- Target launch: Commercial production by Q4 FY26

Planning for

~2.4 mn units annually

Vacuum-insulated stainless-steel bottles, flasks, and containers

Mass Premium Products



Healthier, Stylish, Durable, Non-toxic

Borosil glassware is a non-toxic, eco-friendly alternative to plastic. It's fully recyclable, reusable, and designed to preserve the original taste and quality of contents, making it a superior choice for a healthier and more sustainable lifestyle.



Increasing Disposable Income

Rising disposable income among the upper middle class is transforming India's consumer market, with significant growth driven by both urban and rural areas.



Borosil's Unique Positioning

Borosil is offering high-quality products at affordable prices, positioning itself between mass market and premium market segments with its "Mass Premium Products."



Value Proposition

Borosil offers 'Mass Premium Products' that prioritize safety, affordability, durability, and modern design. Our focus on innovative product development and exceptional customer service ensures we consistently exceed customer expectations.

Storage, Cooking, and Serving Needs of a Modern Kitchen

Expanding from being synonymous with microwavable glass to storage, serving-ware, and domestic appliances



- Contemporary
- Everyday Use

- Performs Beautifully
- Ally to the progressive homemakers

Ally Of Progressive Homemaker


Touching Consumer Life Everyday



— Our Products are Highly Rated and Widely Loved —


Rankings & Ratings on Amazon & Flipkart

#1




Borosil Chef Delite 300 Watts Electric Chopper for Kitchen, Twin Blade Technology, 600 ml 'chop-n-store' plastic bowl with lid, Vegetabl...
★★★★☆ 11,068

#4




Borosil Hydra GoSports 900 ml Stainless Steel Water Bottle | Double Wall Vacuum Insulated Flask, Black | 14 Hrs Hot & 18 Hours Cold |...
★★★★☆ 5,272

#4




Borosil - Vision Glass Set, 295 ml, Set of 6, Transparent
★★★★☆ 4,000

Bestseller




BOROSIL Teal Lunch Box with Bag, 3 Pc (320 ml x 2 + 240...
★★★★ (28,182) Assured

#21



Borosil Klip n Store Universal Lunchbox | Set of 4 (320ml x 2 Square + 240ml x 2 Round), Borosilicate Glass | Microwave & Dishwasher...
★★★★☆ 5,602

Sponsored



Larah By Borosil Blue Eve Silk Series Opalware Dinner Set with Glasses, 35 Pieces for Family of 6, Microwave &...
★★★★☆ 3,709

Reviews on Amazon & Flipkart



Himanshu sharma

★★★★★ My search stops when i purchased this product

Reviewed in India on 14 March 2024

Colour: Black | Size: 300 ml | Pattern Name: Hydra Coffeemate | **Verified Purchase**



Sreevardhan

★★★★★ Quality

Reviewed in India on 2 July 2024

Size: 35 Pcs with Vision Glass | **Verified Purchase**

Nice design with good quality. We received 35 pieces. The printed blue colour design is also nice.



Amrit Koijam

★★★★★ More than the value and Quality

Reviewed in India on 23 June 2024

Size: 300 ml | Pattern Name: Traveller | **Verified Purchase**

5 ★ Must buy!

Borosil means quality product

Vipul Rastogi Certified Buyer, Noida 11 days ago

5 ★ Perfect product!

Very acha quality

Rajeev Ranjan Certified Buyer, Giridih 1 month ago

New Product Development



Key Brand Partners

cromā


SHOPPERS STOP
START SOMETHING NEW

more.

Walmart 

METRO

SPAR 

HomeTown
Ab ghar banana kitna aasaan!


Reliance
RETAIL

A TATA Enterprise
STAR
★ Bazaar ★

D Mart


lifestyle
YOUR STYLE. YOUR STORE.

@home
by Nilkamal

Key Institutional Partners



Consumer Products Business Growth Theme



Made In India

Enhance/ build manufacturing capacity for Opal Glass and Borosilicate Glass in India



New Product Development

Our focus on innovation and customer needs is the backbone of our New Product Development



Leverage Brand Borosil

Borosil is one of the leading brands in India. We leverage this to provide world-class products

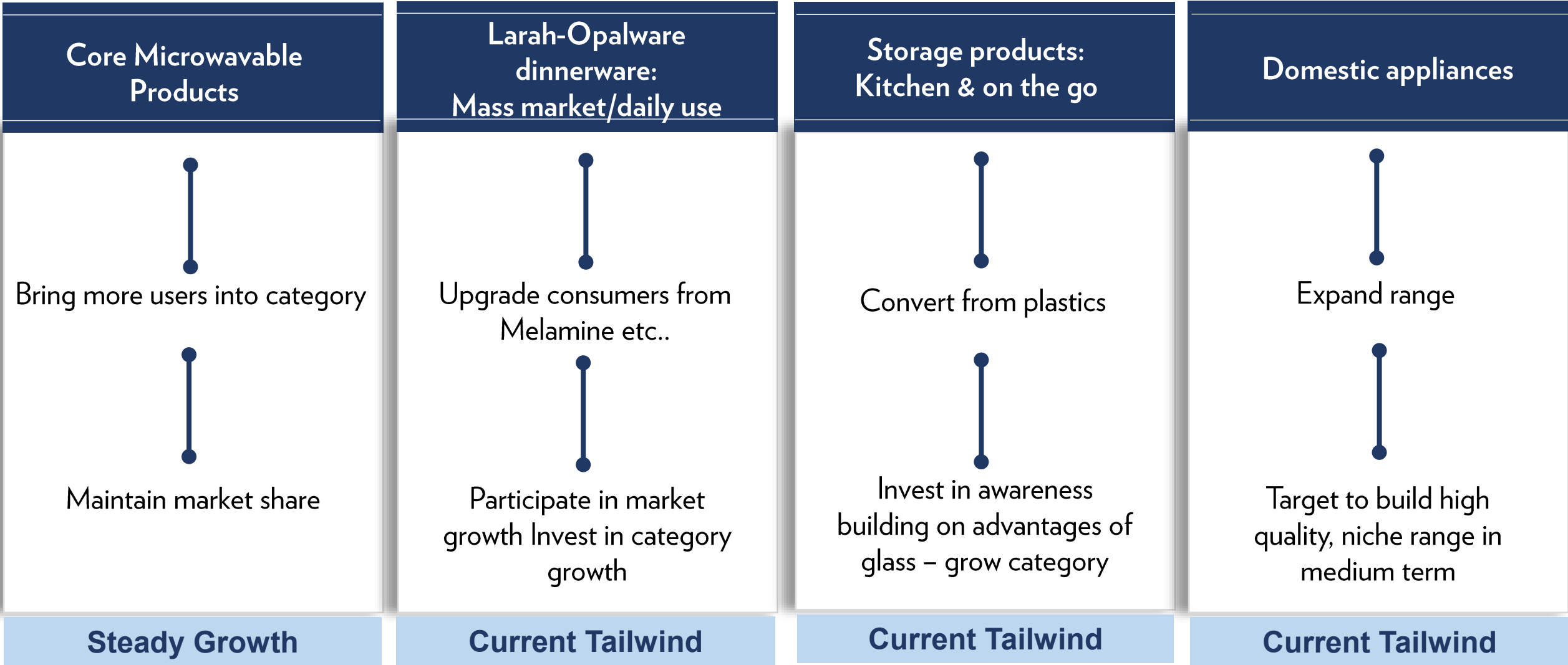


Everyday Usage

To make glassware affordable for mass consumers and promote it for daily use

Product Portfolio

Growth Pillars



Larah Opalware

Category Gaining Salience

**One of the leading player in
~INR 1500 cr category**

- Gaining share in growing market

Focus on market expansion

- Healthier, economic and aesthetic alternative to melamine or steel
- Microwavable, light, break-resistant, non-porous, stain proof, bone ash free



Adoption being led by

- Urbanization and nuclearization of families
- Increase in entertaining guests at home
- Changing lifestyles leading to aspirational preferences

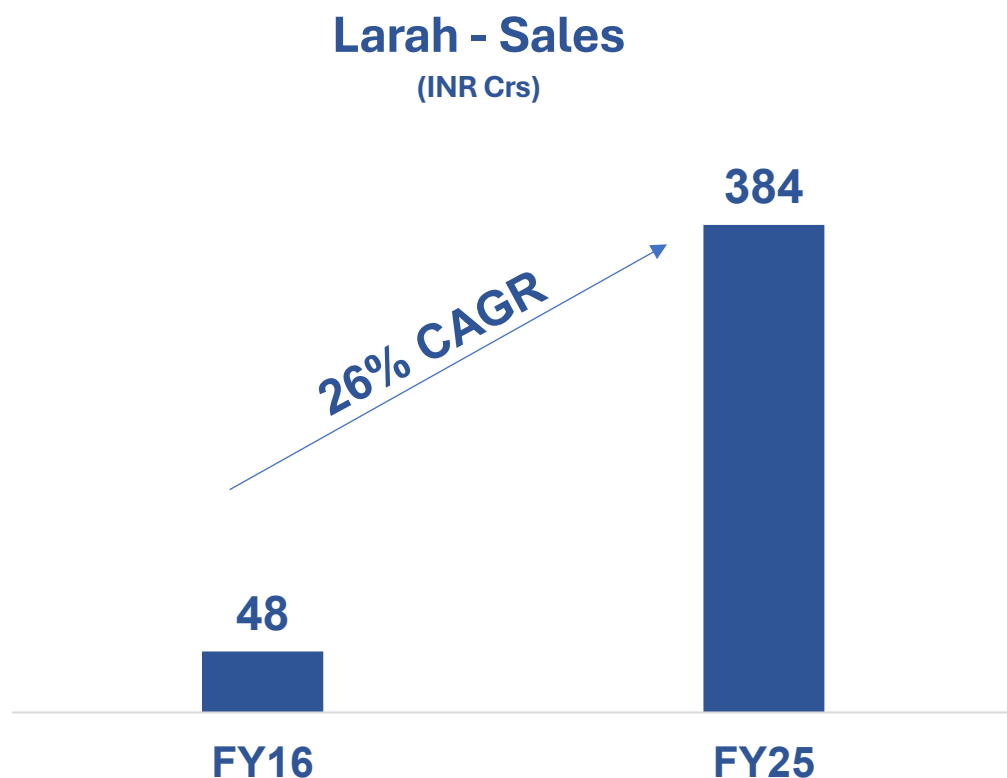
Future Growth Drivers

- Premiumisation of products
- Focused on developing and launching products in new categories



Larah's Remarkable Growth Story

Larah increased its market share significantly, post its acquisition in 2016



Acquisition and Transformation:

- Larah was acquired by Borosil in 2016.
- Strategic steps were taken to revamp operations and market positioning.

Innovation and Market Study:

- Conducted rigorous market studies to understand and capture consumer preferences and regional design trends.
- Developed wide offerings in designs, shapes and compositions based on customer need.

Operational Efficiency:

- Streamlined production processes to enhance efficiency.
- Adopted advanced technologies to improve product quality.

Brand Strengthening:

- Strengthened Larah's brand presence in the market.
- Leveraged Borosil's reputation to boost Larah's market credibility.

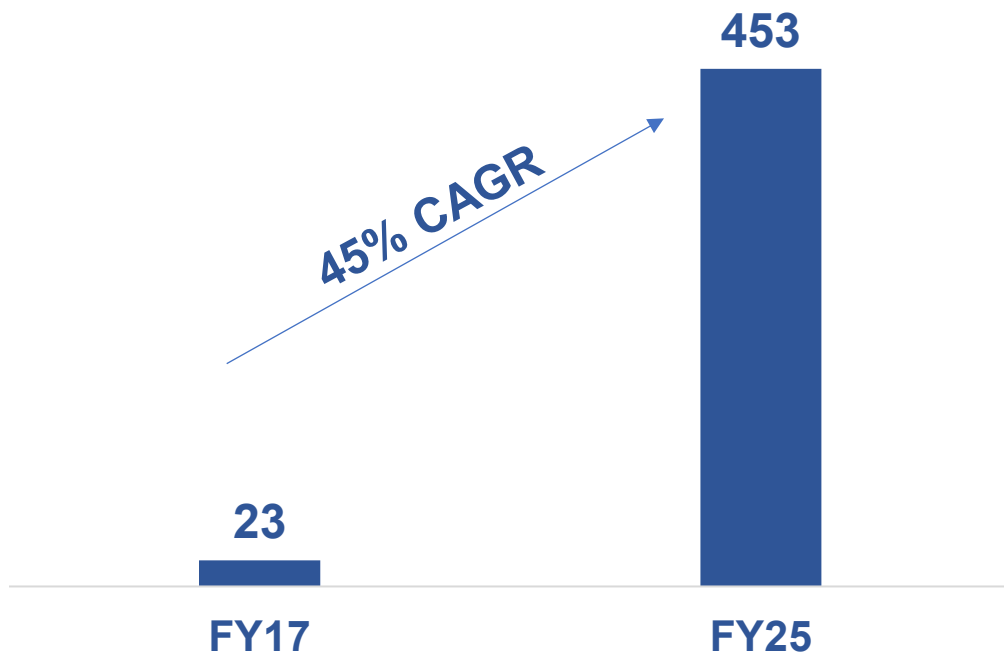
Customer Satisfaction:

- Enhanced customer satisfaction through robust quality controls and tech-advanced CRM systems
- Focused on customer feedbacks resulting into increased customer loyalty.

Non-Glassware the Rising Star

Non-Glassware category has significantly grown over the years

Non-Glassware - Sales
(INR Crs)



Sales of Non-Glassware were majorly driven by:

- Emphasis On Research And Product Development
- Leveraging Our Brand Value
- Effective Marketing And Branding Strategies
- Effective Product Positioning And Pricing Strategies
- Strong Focus On E-commerce
- Emphasis On Quality And Technological Advancements
- Expanding Retail Outlets & Distribution Networks
- Customer Feedback and Engagement

Medium-Term Thrust Areas

Achieve revenue CAGR of ~ 15%-20%



- Increase penetration of glass storage and Opalware
- Introduce high-quality & innovative To-Go storage products
- Gain share in premium niche domestic appliances
- Accelerate growth in E-commerce

Become brand of consumer choice



- Maintain investments in brand building
- Introduce new and improved range of products
- Benchmark online consumer experience with best-in-class
- Establish feedback loops with customers to improve existing products and gather insights for new product development.

Improve EBITDA margins



- Premiumization of products
- Improve warehousing and logistics cost
- Control fixed overheads

Optimise capital employed



- Better estimation of channel inventories
- Increase share of domestic sourcing
- Digital Transformation Initiatives

Domestic Appliances

New Engine of Growth



- Opportunity to create a high quality mass premium range leveraging the Borosil brand

- Commenced without investments in manufacturing assets

- Expanding range of product offerings

- Increase Made in India's portfolio and reduced dependence on China supply chain

Storage Range

Thoughtful Products Creating A New Pillar of Growth



Indian kitchen storage dominated by plastic and steel

- Very low penetration of glass storage



Awareness of glass as an option on the rise

- No health hazard as compared to plastic
- Transparent as against opaque steel & plastic getting stained and translucent over time
- Looks as good as new for extended period of time
- Good design ensures stack-ability & space optimization

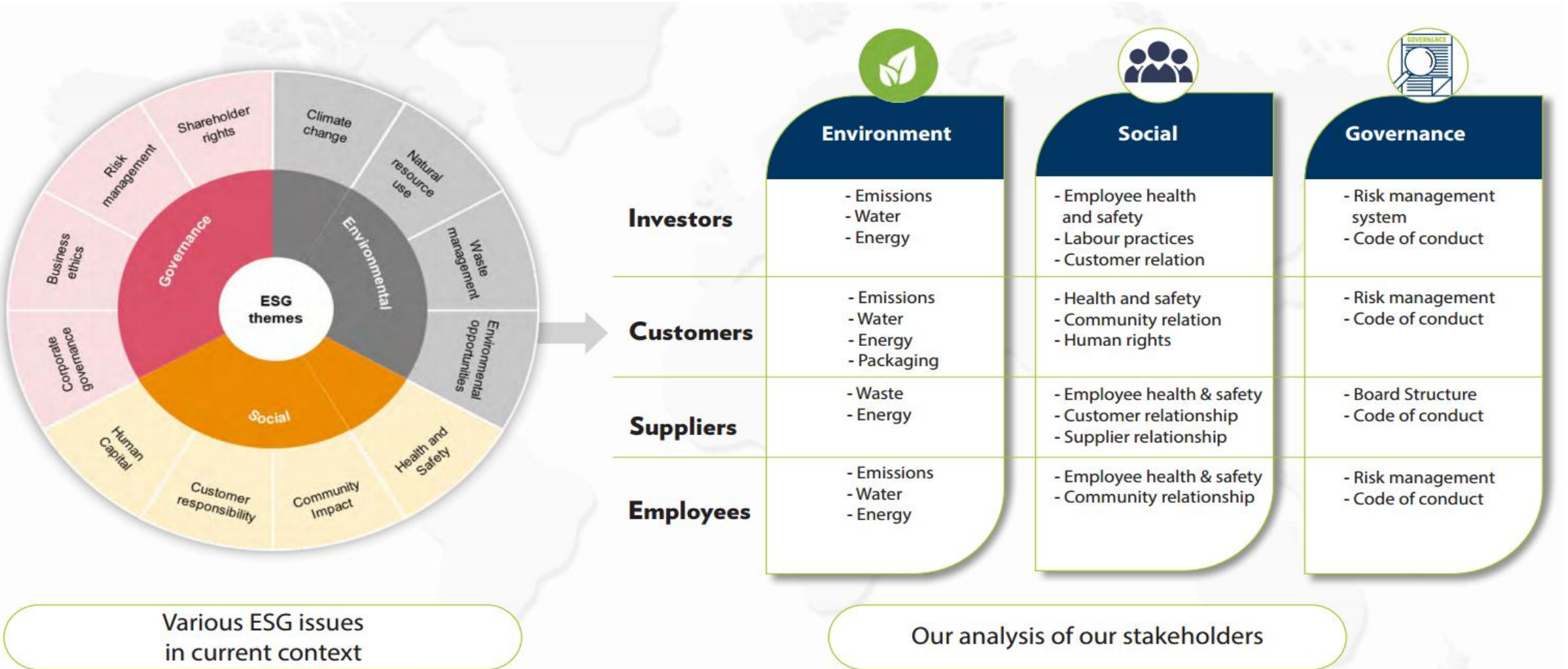


High grade steel design for on-the-go products like flasks & hot food cases an opportunity

Our understanding of ESG

ESG for us is about how we create profits.

It is outcome-driven and not just good intentions.



Borosil 2.0: Leading a responsible tomorrow

Borosil Limited is on a transformational journey to address key ESG opportunities and create long term value for our customers.

Our strategic ESG priorities

- Aim to achieve Carbon neutral operations
- Create a positive water balance
- Explore waste management opportunities
- Transition to low carbon energy

- Achieve a zero-accident workplace
- Become an equal opportunity employer
- Integrate suppliers as business partners
- Building resilient communities
- Empowering customers

- Enhancing transparency & fairness
- Focusing on highest ethical standards
- Creating a risk management framework
- Creating a strong IT infrastructure



Our Actions

- ESG targets disclosures & Dashboard to track the emissions
- Upgradation of Effluent Treatment Plant (ETP) and integration with Zero Liquid Discharge (ZLD) system for optimum utilization of water
- Using recyclable corrugated packaging and limit use of thermocol packaging
- Investment in 8.6MWp and 7.2MWp ground mounted Solar

- Achieved Zero Fatality year on year
- Launched an equal opportunity policy FY24
- Sustainable supply chain management policy in place & Initiated deployment of Supplier code of conduct (SCOC)
- Multiple community development programs launched on a need basis
- Highly customer focused operations with special grievance redressal department for customers

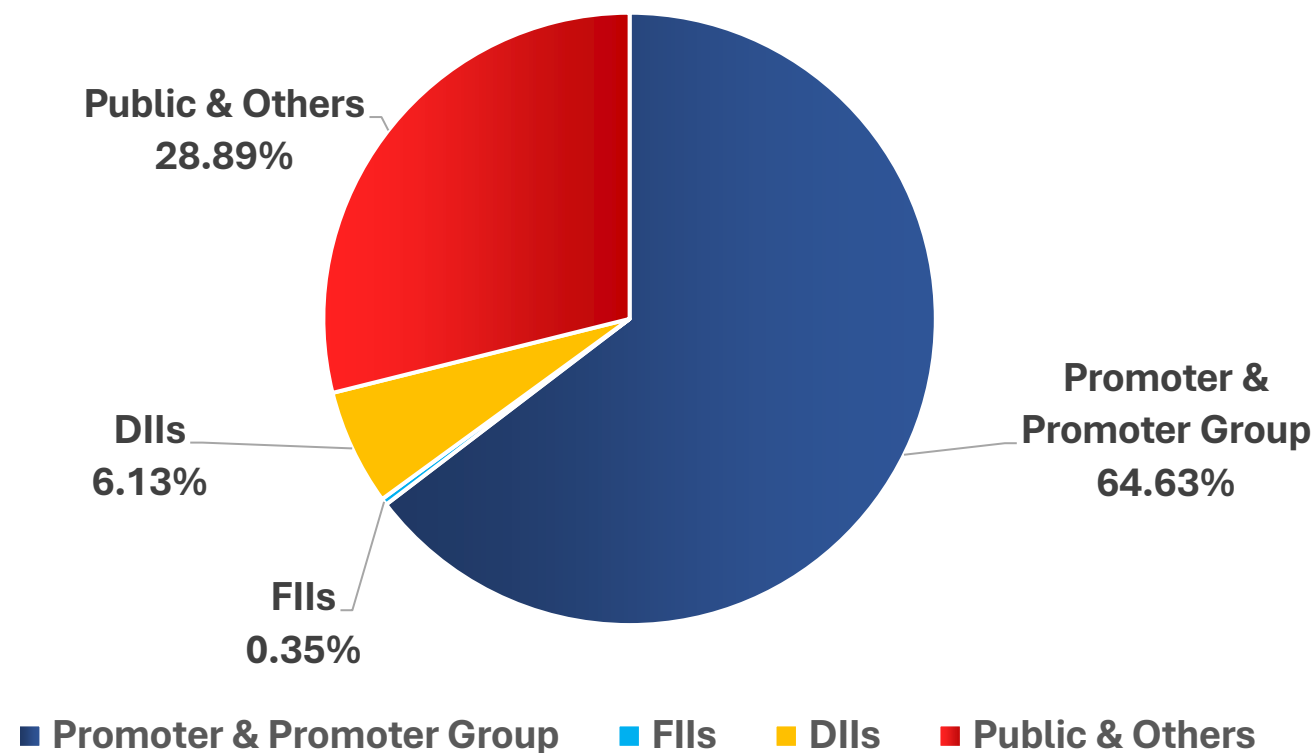
- Establishing Ombudsman to address grievances
- A group-wide Code of Conduct applicable to all employees and leadership. Awareness session & training is being conducted
- ESG risks are incorporated in the risk management framework
- A group-wide program on the evaluation of IT risks.

Borosil Limited aims to disclose quantifiable targets in short to medium term and transparently report performance against the targets.

Equity Information

No. of Shares issued of ₹1 each, as at 30th June 2025: 11,95,51,311

Shareholding % as on 30th June 2025



1369812D:IN Bloomberg Ticker	BOROLTD NSE Ticker
543212 BSE Ticker	~₹4075crs Market CAP

Market Cap (NSE) as on 30th Jun 2025

Board Of Directors



Mr. Pradeep Kumar Kheruka
Chairman



Mr. Shreevar Kheruka
Vice Chairman, Managing
Director & CEO



Mr. Rajesh Kumar Chaudhary
Whole-Time Director



Mr. Kewal Handa
Independent Director



Mr. Kanwar Bir Singh Anand
Independent Director



Ms. Anupa Sahney
Independent Director



Mr. Adarsh Menon
Independent Director



Thank You

Anand Sultania

(Chief Financial Officer)

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(VP Investor Relations)

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