



## Future Supply Chain Solutions Limited



**FSC –NE Joint Press Conference**  
**December 11, 2019**



India to be amongst the fastest growing economies; Growth in manufacturing and consumption demand driving the need for logistics service



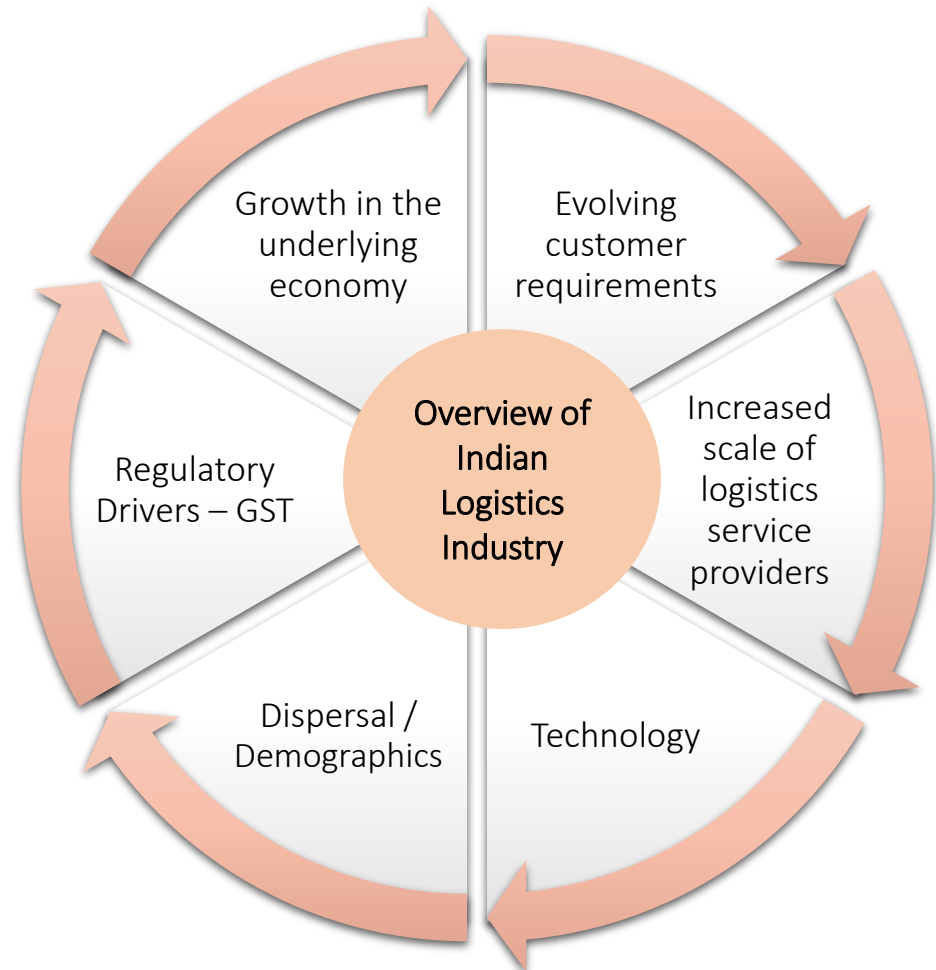
Opportunity to optimize logistics spend as industry is 2x less efficient than US and China; Unorganized participants constitute ~85% of the logistics demand



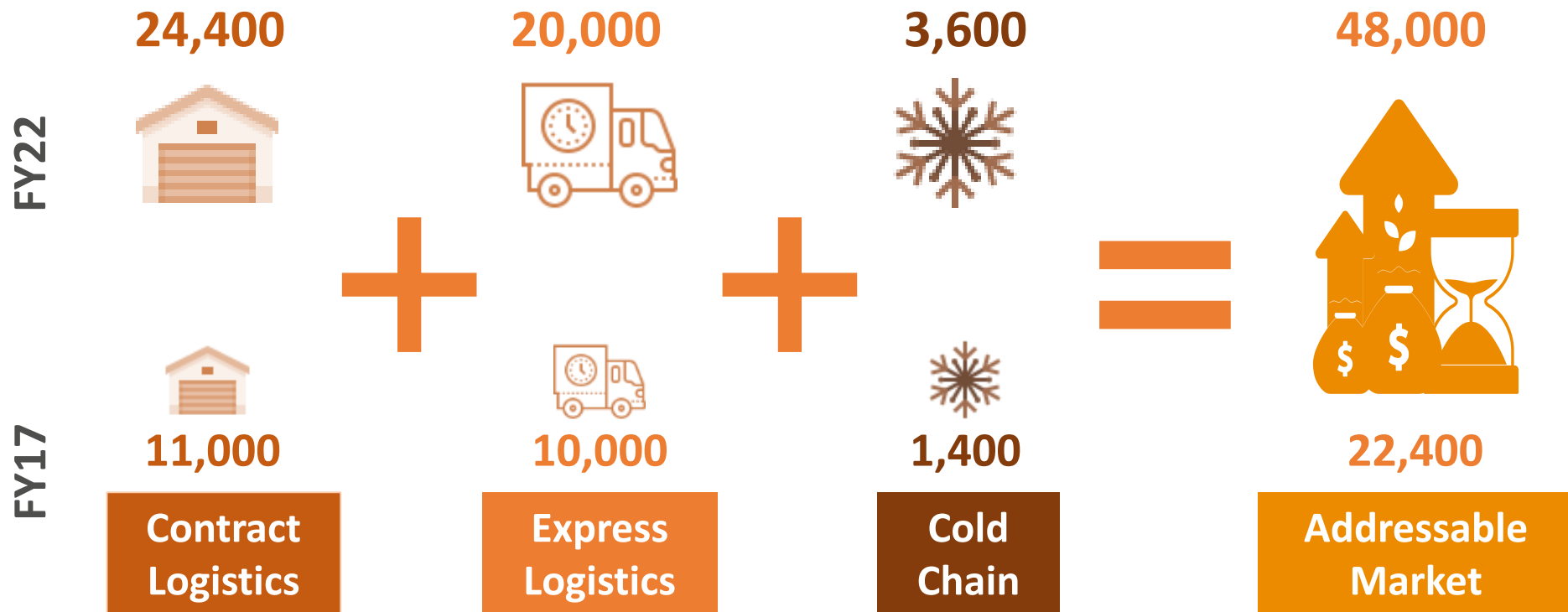
GST expected to improve performance of all logistics sub sectors; GST likely to create multiple opportunities



Organizations are increasingly focusing on their core competencies, while outsourcing crucial and complex operations, such as IT and Supply Chain.



# Indian Logistics Industry Size: Significant Growth Opportunity



All figures in INR Crore

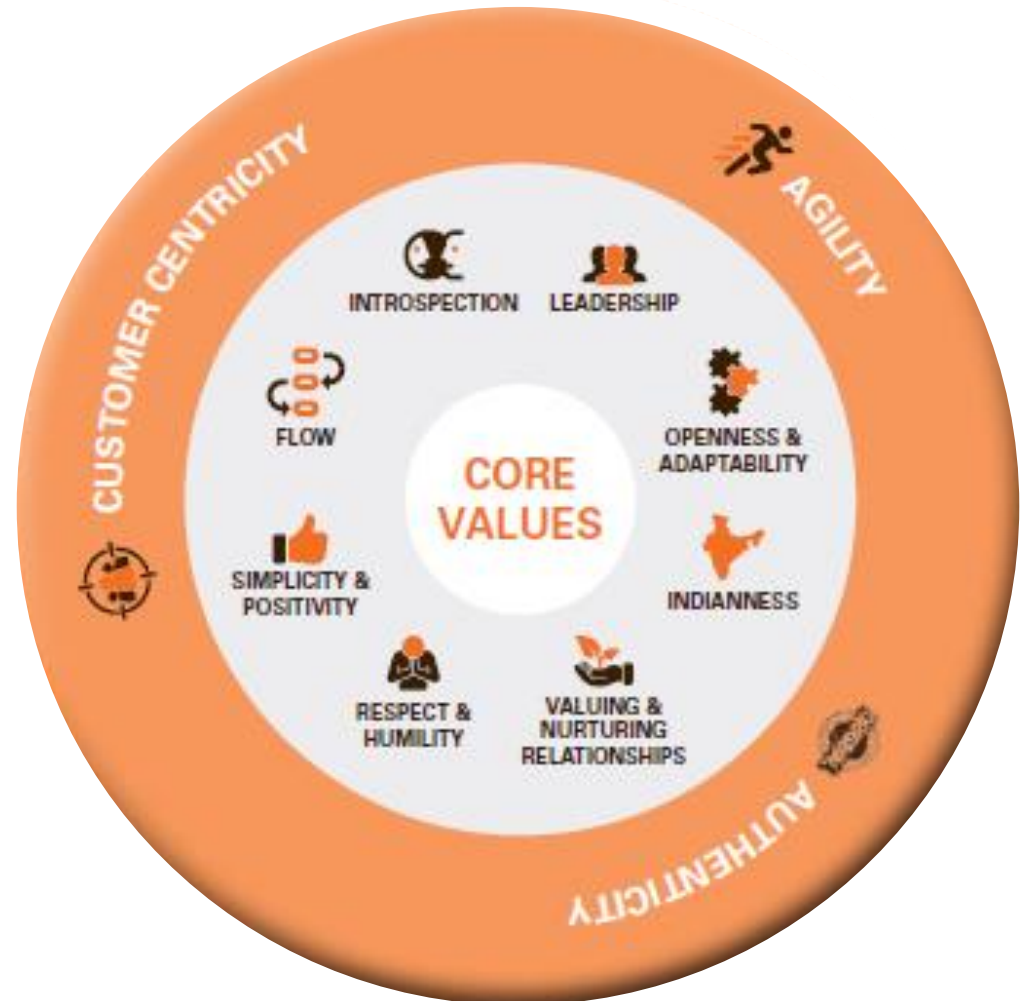
**FSC's Target Segments Expected To Grow at 15-20% CAGR**

## PURPOSE

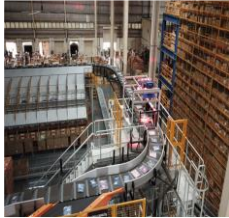
We **add velocity** to our customers' aspirations.

## VISION

To be a **₹ 10,000 crore** company by partnering with **consumer-facing businesses** offering them **agile, reliable and integrated** supply chain solutions through our **world-class, technology-enabled infrastructure**.



## Integrated Service Offering



### **Contract Logistics**

Warehousing, distribution and value-added services



### **Express Logistics**

Point-to-point, full and part truck-load, time-definite transportation services



### **Temperature Controlled**

Cold-chain warehousing & transportation for perishable products

## Amongst India's largest organized third-party logistics operators

Comprehensive solutions for supply chain requirement

At forefront in introducing new standards of technology & automation in the Indian logistics industry

Pan-India Supply Chain Network

Diverse customer base across many sectors; Longstanding relationship with Future entities

Asset Light Business Model

Well positioned to cater to the shift to pan-India distribution pursuant to GST implementation

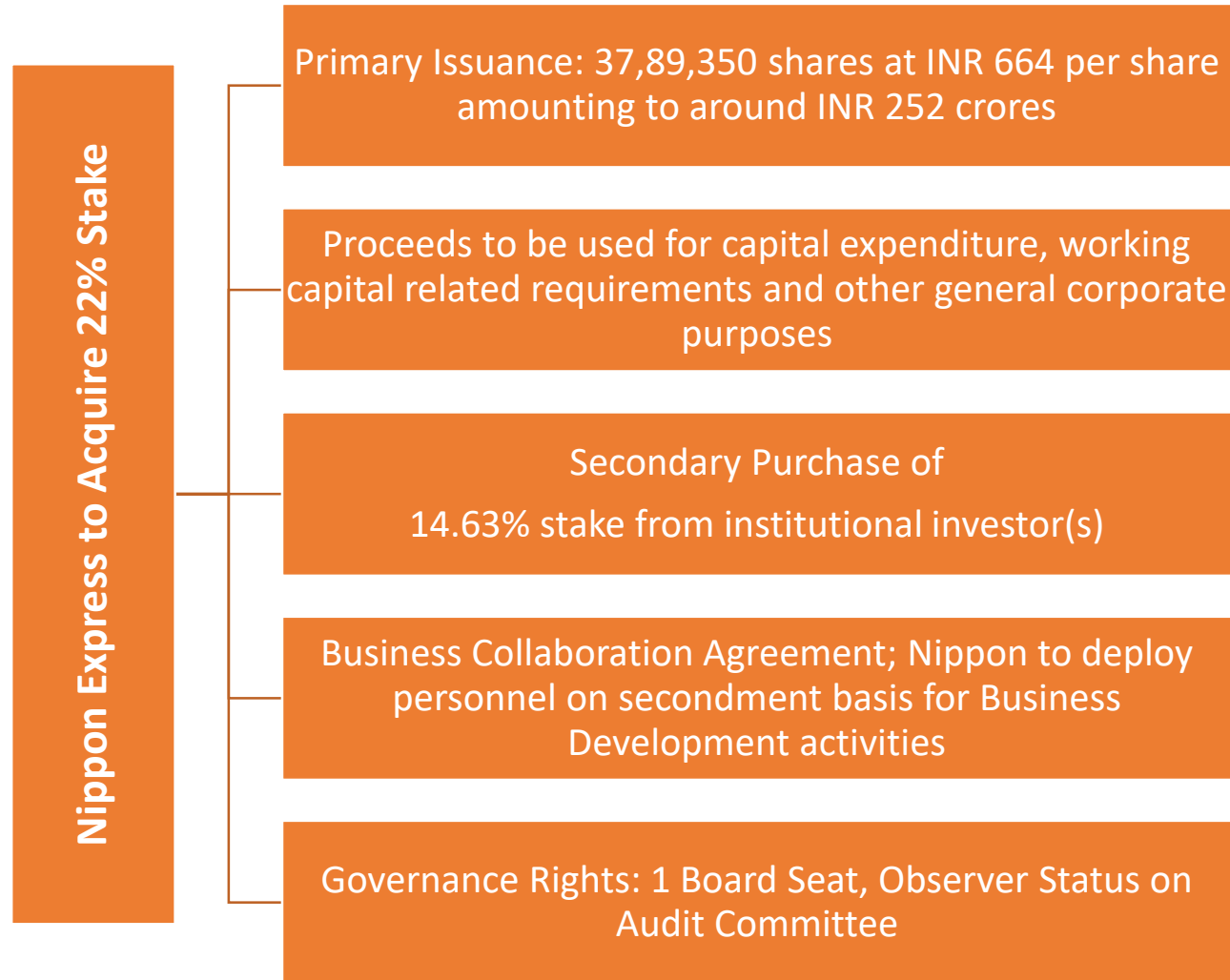


# Strong Presence in Fast Growing Consumption Sectors

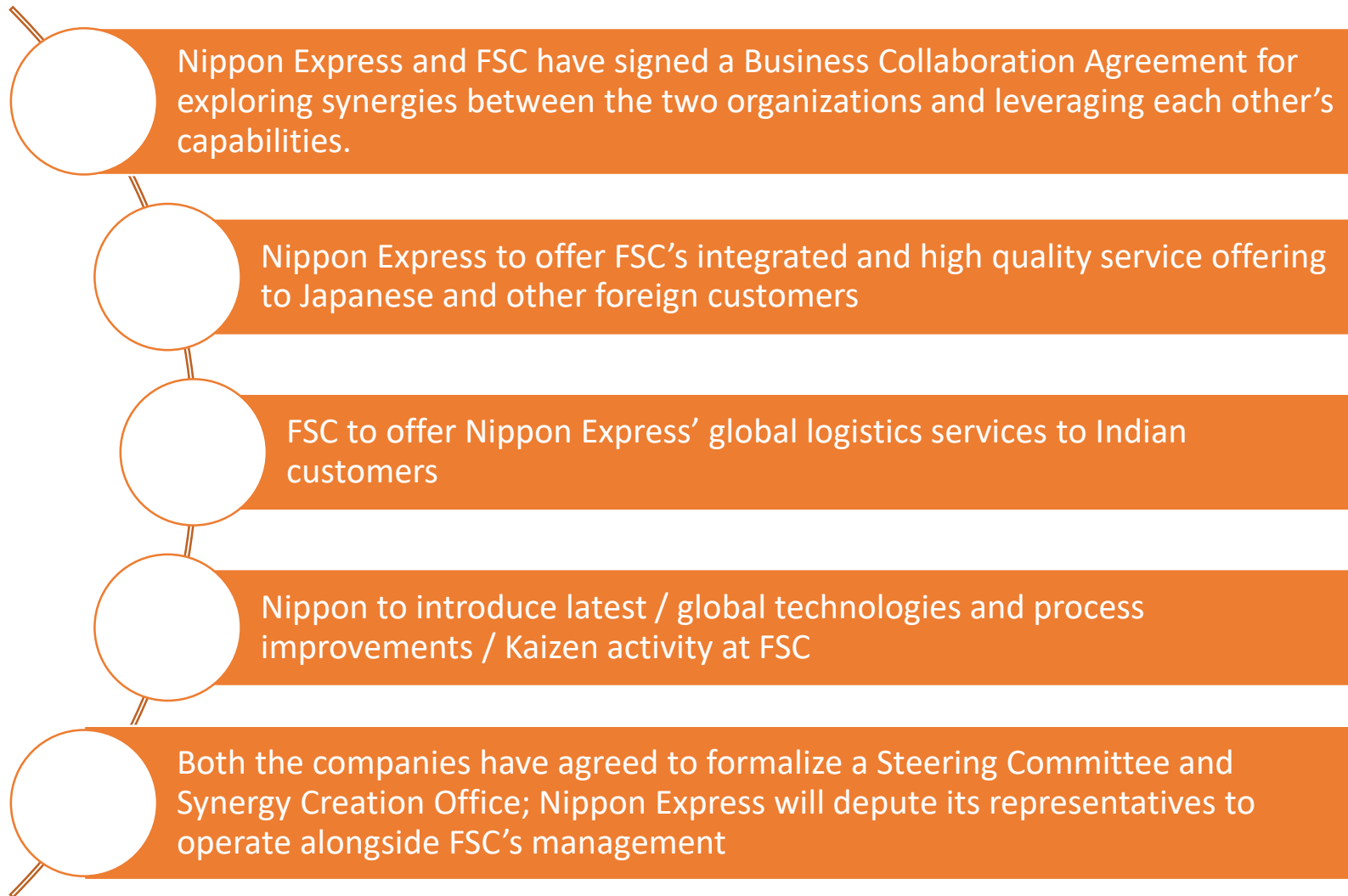


**85-90%** of the business is driven by the consumption-driven sectors.

# Nippon Express to Acquire 22% Stake in FSC: Deal Structure



Transaction has received all necessary approvals including Competition Commission of India, Stock Exchanges in India and FSC Shareholders





Let's aspire to become India's  
leading logistics player, capturing  
opportunities arising from  
remarkable growth in the Indian  
logistics industry



**NAMASTE**