



Birla Cellulose

Increase in Export of MMF Garments



ADITYA BIRLA GROUP



Birla Cellulose
Fibres from nature



Date: 17th Sep, 2020

ABG - Pulp & Fibre Foot Prints



Pulp Units – 5

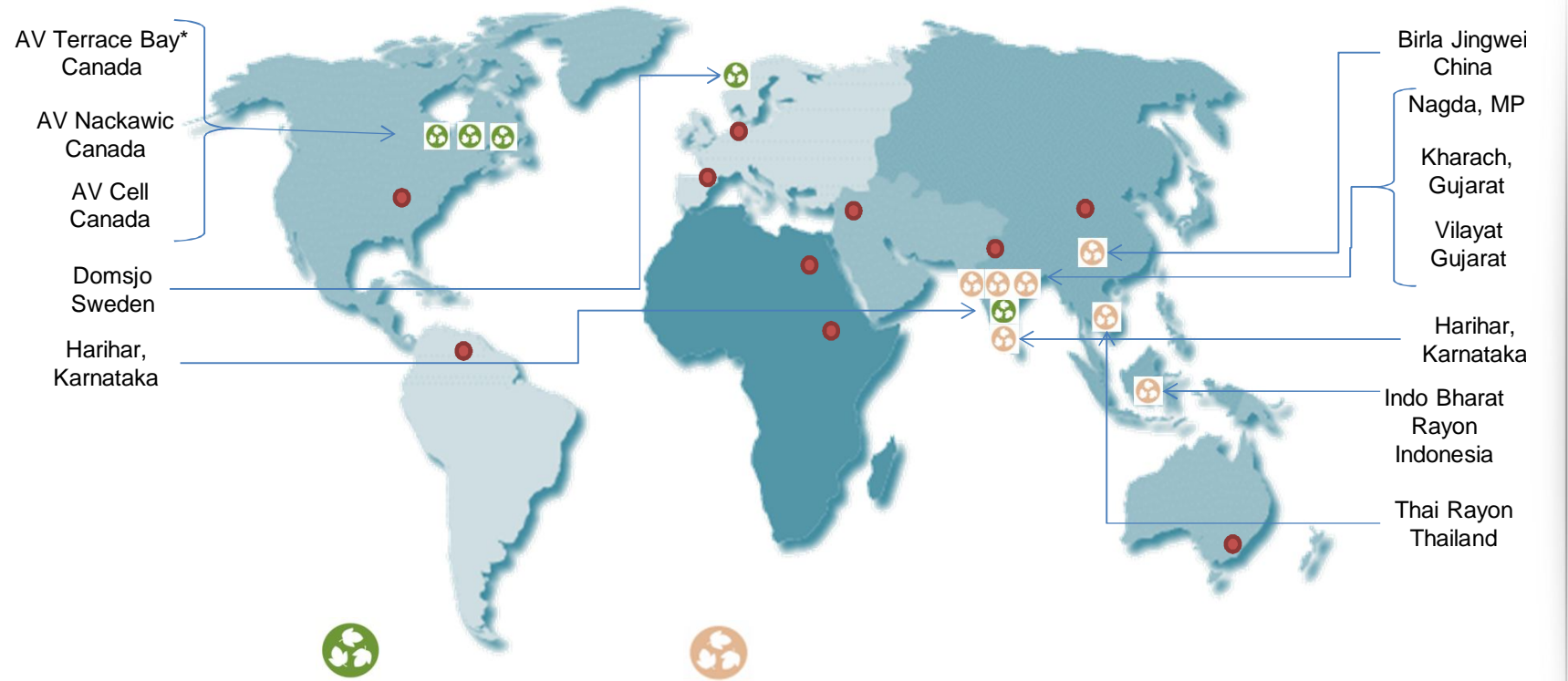


- AV Terrace Bay* Canada
- AV Nackawic Canada
- AV Cell Canada
- Domsjo Sweden
- Harihar, Karnataka

Fibre Units – 7



- Birla Jingwei China
- Nagda, MP
- Kharach, Gujarat
- Vilayat Gujarat
- Harihar, Karnataka
- Indo Bharat Rayon Indonesia
- Thai Rayon Thailand



Pulp
1051 KTPA, 2880 TPD

Fibre
1033 KTPA, 2830 TPD

Servicing 650 customers
in 48 countries



*AV Terrace Bay produces paper grade pulp

ABG Presence in Textiles – Forest to Fashion



 **Pulp & Fibre Business** 

Textiles & Overseas Spinning

Madura Garments (ABFRL)



Wood **Pulp** **Fibers** **Yarn** **Fabric** **End product**

Managed forests

Pulp units in Sweden (1), Canada (3) & India (1)

Fibre units in India (4), Thailand (1), Indonesia (1) & China (1)

Yarn units in India (3), Thailand (1), Indonesia (3) & Philippines (1)

Fabric units in India

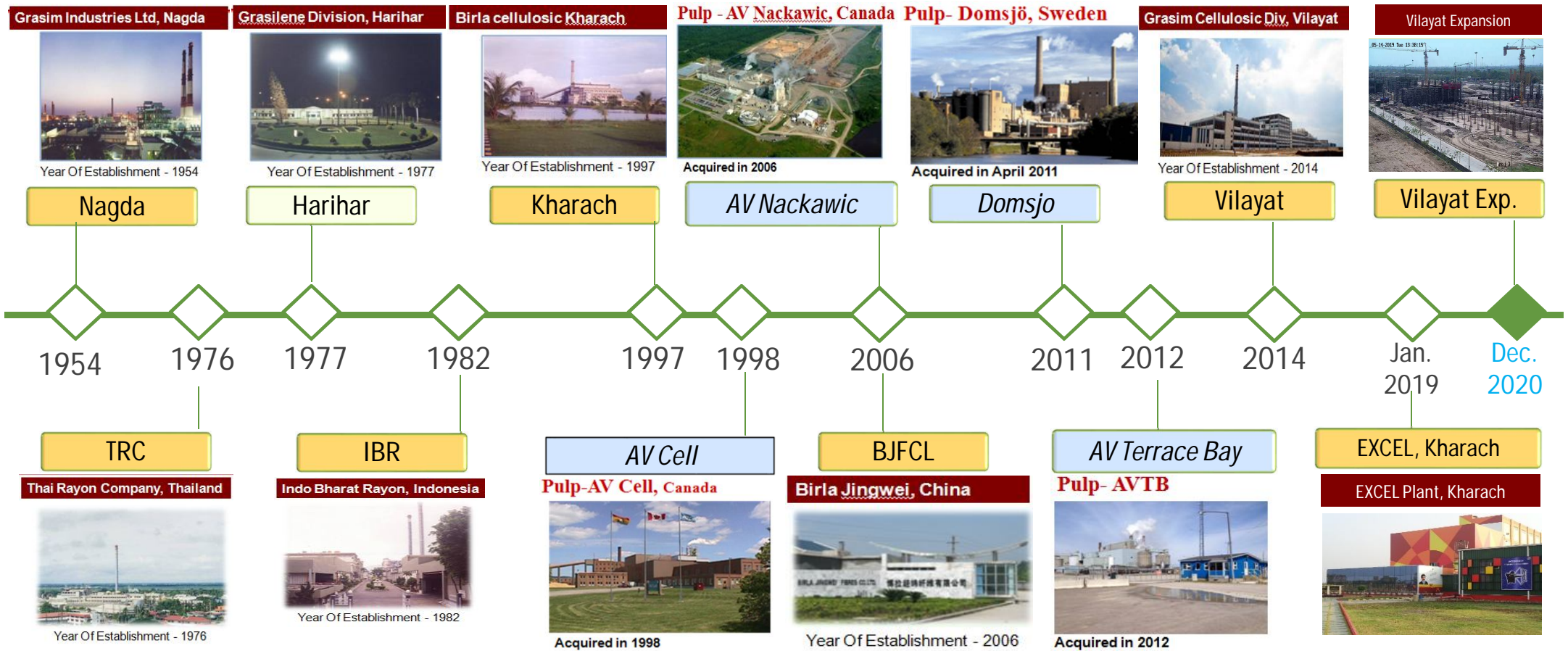
Apparel & Retail (India)

ABG is Present across the entire Textiles Value Chain – perhaps the only Group in the World

Pulp & Fibre Business - Our Journey to Date

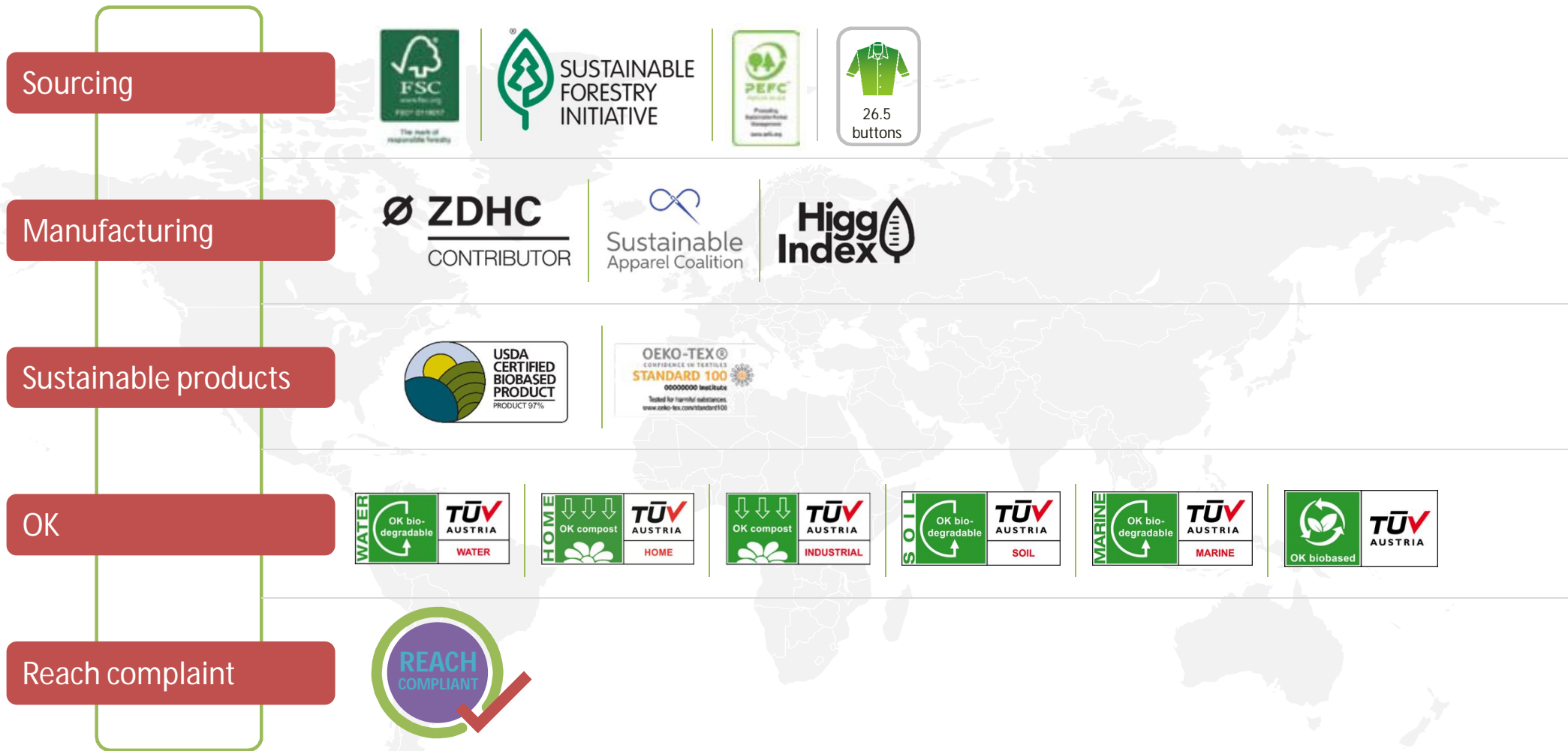


From 10 TPD in 1954 to 2830 TPD in 2020



Underpinned by 5 R&D centers and 15000 employees || Over 55% of revenues from Overseas operations

Global Certifications



Changing World of Fashion



**ENVIRONMENTAL
PRESSURES**



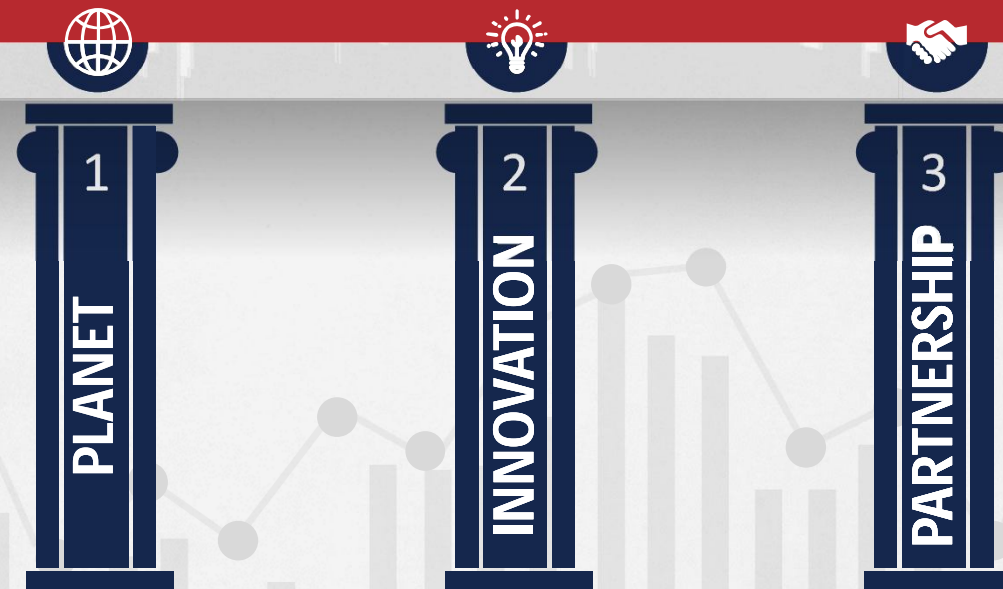
**CONSUMER
EXPECTATIONS**



**TECHNOLOGY
DISRUPTIONS**

Transforming Challenges Into Opportunities

Key Pillars of our Strategy



This is not just a strategy, but a philosophy

“Birla Cellulose aspires to be the Leader in the Sustainable Business Practices in the MMCF Industry”

Five Pillars



RESPONSIBLE SOURCING



RESPONSIBLE MANUFACTURING



SUSTAINABLE PRODUCTS & CIRCULAR ECONOMY



VALUABLE PARTNERSHIPS



SOCIAL RESPONSIBILITY

THESE PILLARS UNDERPIN HEALTH & WELL-BEING OF THE PEOPLE AND THE PLANET

Birla Cellulose – Sustainability Strategy



Sustainable Products & Circular Economy

Sustainable Innovations – LivaEco, Lyocell, Dope dyed, Recycle textile waste
OEKO-TEX® Standard 100, Biodegradability & Compostability, No Toxicity, Tracer

Responsible Manufacturing

- Closed Loop Process (target EU BAT, EU Ecolabel)
- ZDHC MMCF Standards
- Higg (3.0) FEM 3rd party verified score
- OSHAS 18001, ISO 14001, LCA

Responsible Sourcing

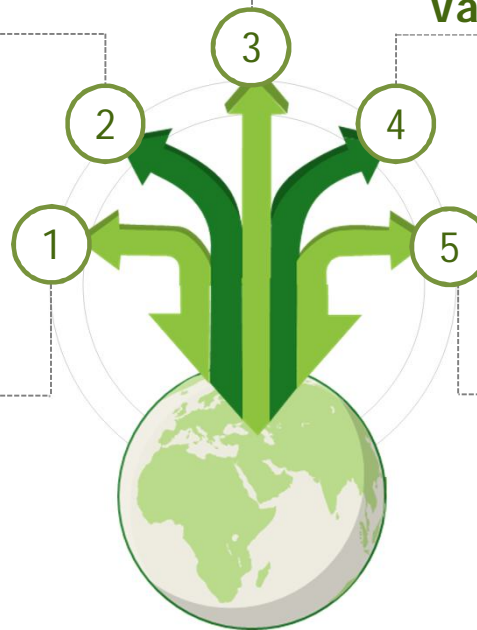
- 100% FSC®, SFI®, PEFC™, Canopy - Green
- Supplier Code of Conduct - Ethics, Human Rights
- Chemicals Management, no use of MRSL
- Implement Environment and Safety best practices

Valuable Partnerships

- ZDHC, SAC, Textile Exchange, CMF, Canopy
- Value Chain – LAPF, LivaEco, Block Chain traceability
- Technology & Research Institutes, Licensers
- STS, ERM, Ernst & Young

Social Responsibility

- 7.5 million lives touched, healthcare to millions
- 46,000 children educated
- Daily meals for 63,000 students
- 35,000 women empowered
- SA 8000, SMETA Audit | Sedex



Sustainable Business Strategy - Collaborative approach covering entire MMCF Value Chain

LivaEco™ – Brand Eco-system

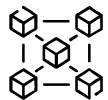
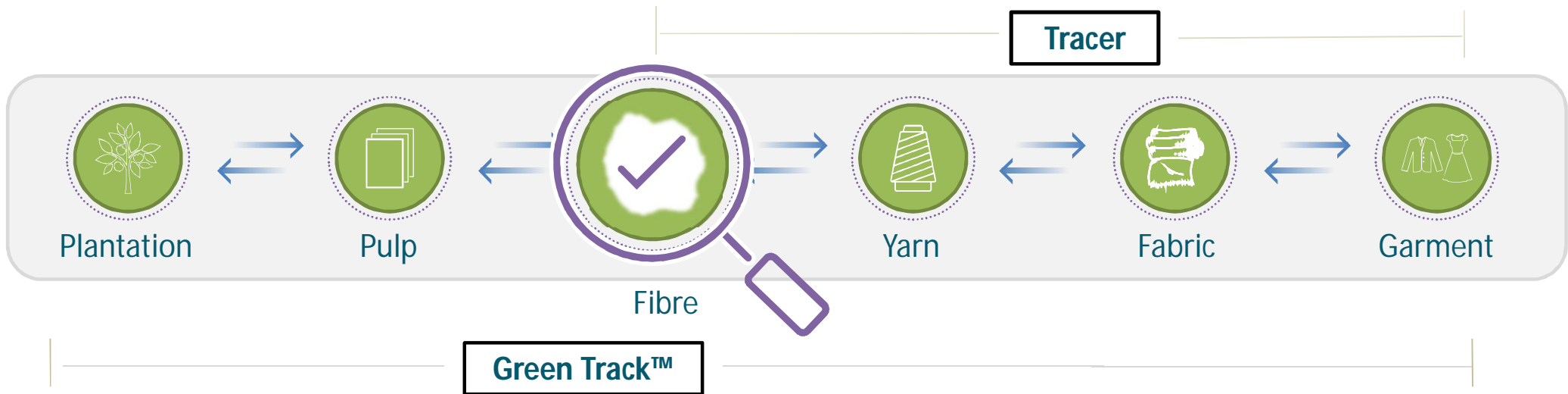


Brand Tagged with
LIVA Eco are not just fashionable but consciously fashionable

Best in Class Traceability & Transparency

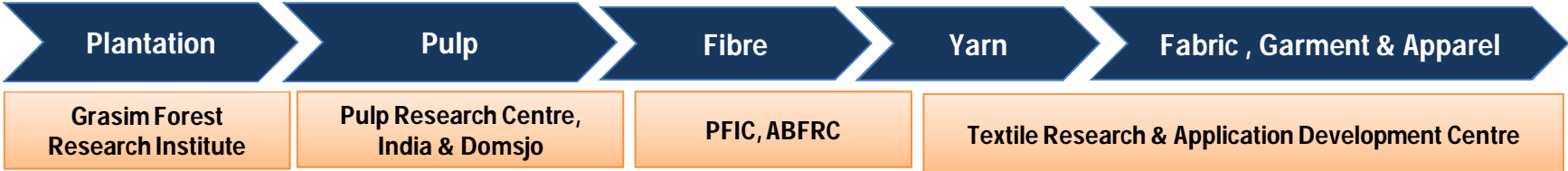


This tracer helps you to do source verification at all stages of the value chain from fibre to fashion



Block chain technology platform – Green Track™ is used to trace upward and downward value chain, to maintain authenticity of sourcing

Innovation – Idea to Value Creation



R&D network services entire value chain – **FOREST TO FASHION**

Examples of Major Initiatives

A	New Product Development		B	Process Improvements	
	• Dye catcher	• Short cut		• Lower cost VSF	• Viscosity control
	• Antimicrobial	• Super absorption		• CS2 recovery	• Recycling
	• Superwhite Sno	• Fire retardant		• Cost reduction	• Yield improvement

T.R.A.D.C. (Textile Research and Application Development Center)



TRADC offers many services that assist you - our value chain partners, in bringing MMCF to the market and continuous upgrade our offering

- ✓ Provide a comprehensive Textile Research
- ✓ Facilitating innovation to Textile & Fashion Industry
- ✓ Quality up-gradation
- ✓ Manufacturing efficiency improvement
- ✓ Achieving Global Leadership by innovating design
- ✓ Products with technological research and application



Testing



Spinning



Weaving



Knitting



Textile Wet Processing



Garmenting



Product Perfection & Technology Transfer



Reactive Orders From Customers



New Fibre Development Support and Feedback



Research Projects & Training Services



Tests, Evaluation & Solution Services



Proactive Collections

A well equipped design studio at Mumbai Head Office

- ✓ Integrated and multi-disciplinary approach,
 - Market and trend research
 - Creates fabric & garment collections
 - Design innovation and style directions.
- ✓ D&D department works on 2 fabric collections
 - Spring-Summer and
 - Autumn-Winter
- ✓ Works on designs for various product categories in MMCF
Co create with design team of brands to adopt design and quality
- ✓ Facilitates the supply chain to align to the trends for global demand.

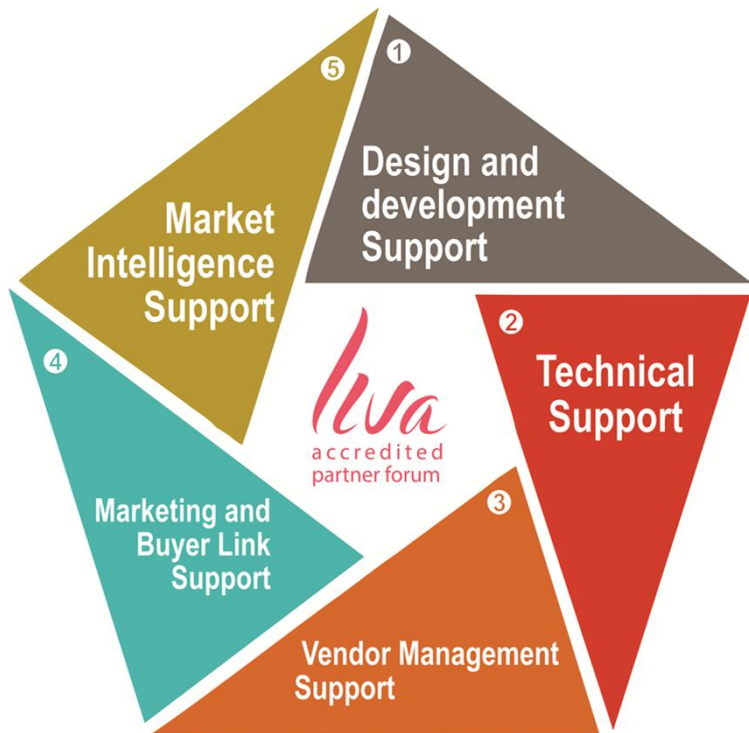
Primary focus of the Design team to influence consumers and inspire them to create the pull towards MMCF.



Business Development - LIVA Accredited Partner Forum



Downstream Value Chain



A community of Spinners, Fabricators & Processors who work closely with Birla Cellulose to improve on innovation, quality, technology and deliver world-class products to discerning buyers.



ABG – AGGREGATING THE FRAGMENTED VALUE CHAIN

LAPF Studios – Complete Sourcing Solutions



LAPF Studios offer **One Stop Solution for all fabric Sourcing needs** directly from LAPF Partners.
Sourcing with Multiple Options | Technical Guidance for Quality | New Product Development & Perfection

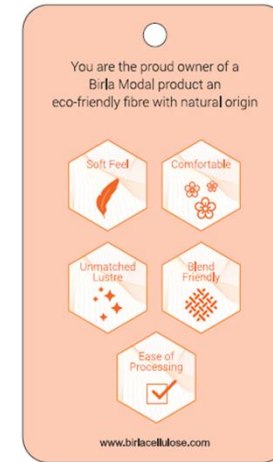


Exclusive LAPF Studios at:

NOIDA in association with NAEC
Tirupur, in Association with TEA
Jaipur in Association with GEAR

New York, USA
Bandung , Indonesia

Co – Branding (Liva Tags)



Co – Branding (Liva Tags)



Working with all leading brands



WAL*MART®

Park Avenue™

TARGET



JOCKEY™

RALPH LAUREN

H&M

Raymond

GAP

AMERICAN EAGLE
OUTFITTERS



aurelia
Women's wear

VAN HEUSEN

TESCO

BIBA

KOHL'S.com
expect great things™

Allen Solly™

ESPRIT

MARKS &
SPENCER

Li & Fung Limited

pantaloons

next

bon
prix
it's me!

★ macy's

lifestyle
YOUR STYLE. YOUR STORE.

SHOPPER'S
STOP Shopping. And beyond.

ZARA

Viscose Based Garment Exports



India: Apparel Exports							
Mn \$	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	CAGR
Total RMG	14935	16833	16966	17368	16705	16176	2%
Cotton based RMG	9069	9283	9090	8513	8509	8700	-1%
MMF based RMG	3128	3997	4182	5036	4745	3858	4%
VSF based RMG Exports	1530	2120	2580	2390	2630	2540	11%
RMG of other Textile Materials	2188	2942	3185	3463	3122	3226	8%
Wool based RMG	310	308	265	214	171	203	-8%
Silk based RMG	240	304	244	142	159	189	-5%

Viscose based garment exports have grown by 11% CAGR in last 5 years; while overall garments exports have stagnated.

Let us Collaborate & Grow together ...



Thanks