

NEROLAC

Corporate Presentation



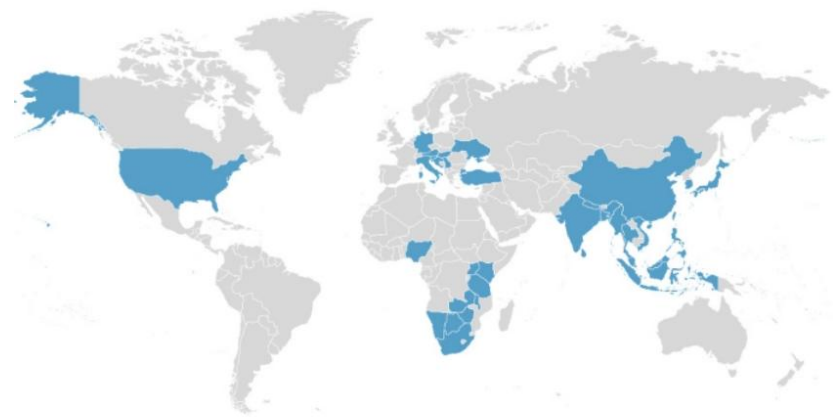
Kansai Paints, Japan Introduction (Parent Company)

NEROLAC

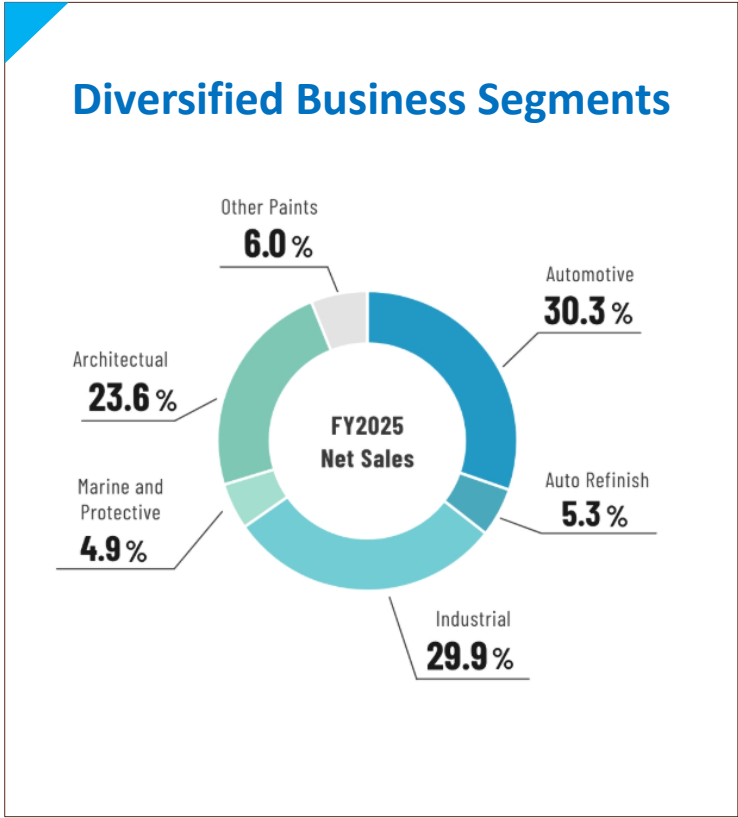
Established in **1918**

Consolidated net sales
¥589.8 Billion | ~\$3.6 Billion

No of Group Companies **140**



Number of Employees (Consolidated)
16,739 people





KNPL Introduction



Ownership

Subsidiary of



Founded

Gahagan Paints & Varnish Co. Ltd.

1920

Indian Paint Industry

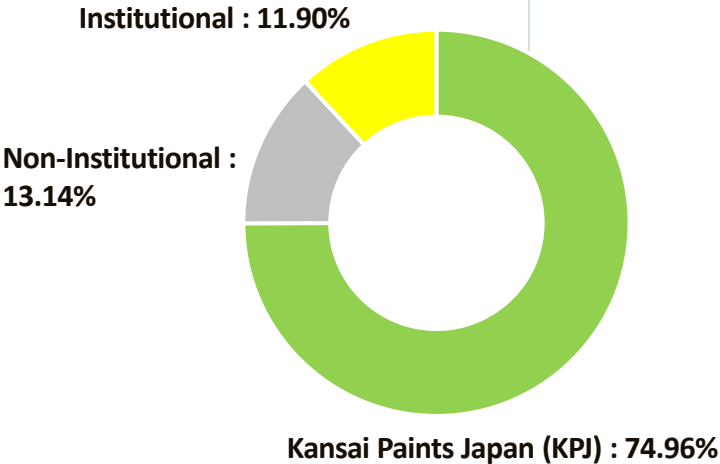
Market Position

Leader in Industrial Paints

Shareholding Pattern

as on **March 31st, 2026**

- 9 strategically located plants
- 112 Depots Pan India
- 8 Regional Distribution Centres



1920

Started as Gahagan Paints and Varnish Co Ltd. with factory at Lower Parel



1933

Acquired by Lead Industries, UK

1933

Name changed to Goodlass Wall (India) Ltd.

1946

Name changed to Goodlass Wall Pvt Ltd.

1957

Changed name to Goodlass Nerolac Paints Ltd

2000

Company implements SAP ERP across all locations

2000

Tata Group divested its holding in favour of Kansai Paint Japan Co., Ltd, Japan

1986

Kansai Paint Japan Co., Ltd acquired stake of the UK Partner, Cookson

1983

Technical collaboration with Kansai Paint Japan Co., Ltd

1976

Tata group acquired a part of the foreign shareholding

2006

Name changed to Kansai Nerolac Paints Ltd. with a new logo



2012

Acquisition of Nepal Shalimar Paints Pvt. Ltd. In Nepal

2015

Tie-up with Capital Holdings Maharaja Pvt. Ltd., Sri Lanka for Lanka Operations

2018

Acquisition of Marpol Pvt. Ltd.

2018

State-of-the-art R&D Lab in Vashi, Mumbai commissioned



2020

Unveiled the new corporate identity of Nerolac - Colours that Care



2019

JV with Polygel Industries Pvt. Ltd. to form Nerofix Pvt. Ltd

2019

Acquired Perma Construction Aids Private Ltd

2018

Acquisition of RAK Paints, Bangladesh



MISSION

We leverage superior technology to contribute to our customers and society, in a sustainable manner, with innovative Products and Services, through a competent workforce built on a culture of Customer Focus, Integrity and Respect for our stakeholders.



PURPOSE

Create an environment for a healthy and beautiful future



VISION

We design Solutions that Protect, Inspire and Touch Lives every day.



BRAND PROMISE

Renew Life

CORE VALUES



Integrity



Customer
Focus



Accountability



iCare!



Respect



Entrepreneurial
Mindset



Innovation

Our Operational Footprint

Mumbai

Head office (HO)

9

Manufacturing
Plants

1

Centralised R&D unit
at Navi Mumbai

5

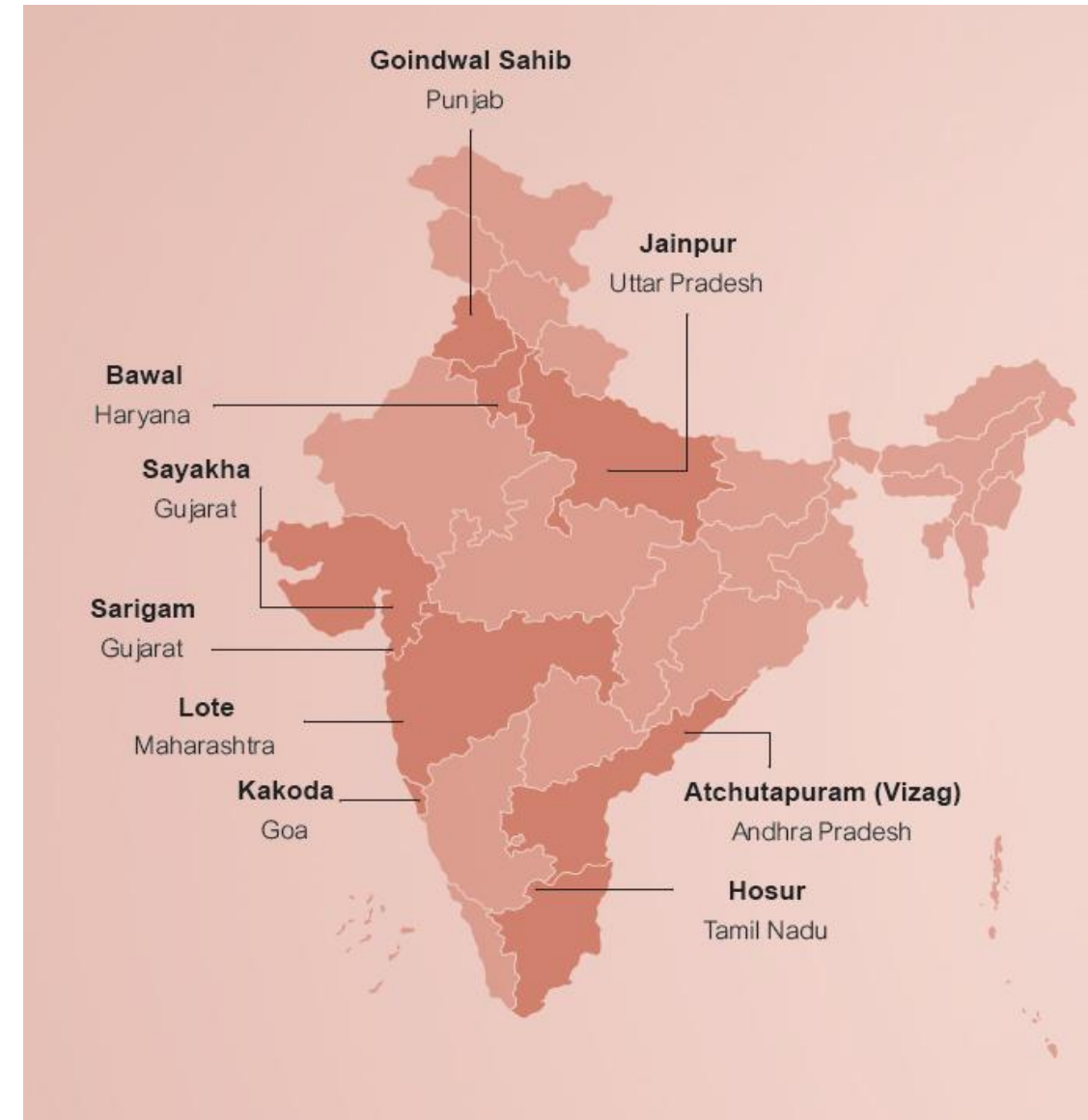
Satellite R&D units (2 at Lote
and 1 each at Hosur, Bawal
and Sayakha)

112

Depots across
India

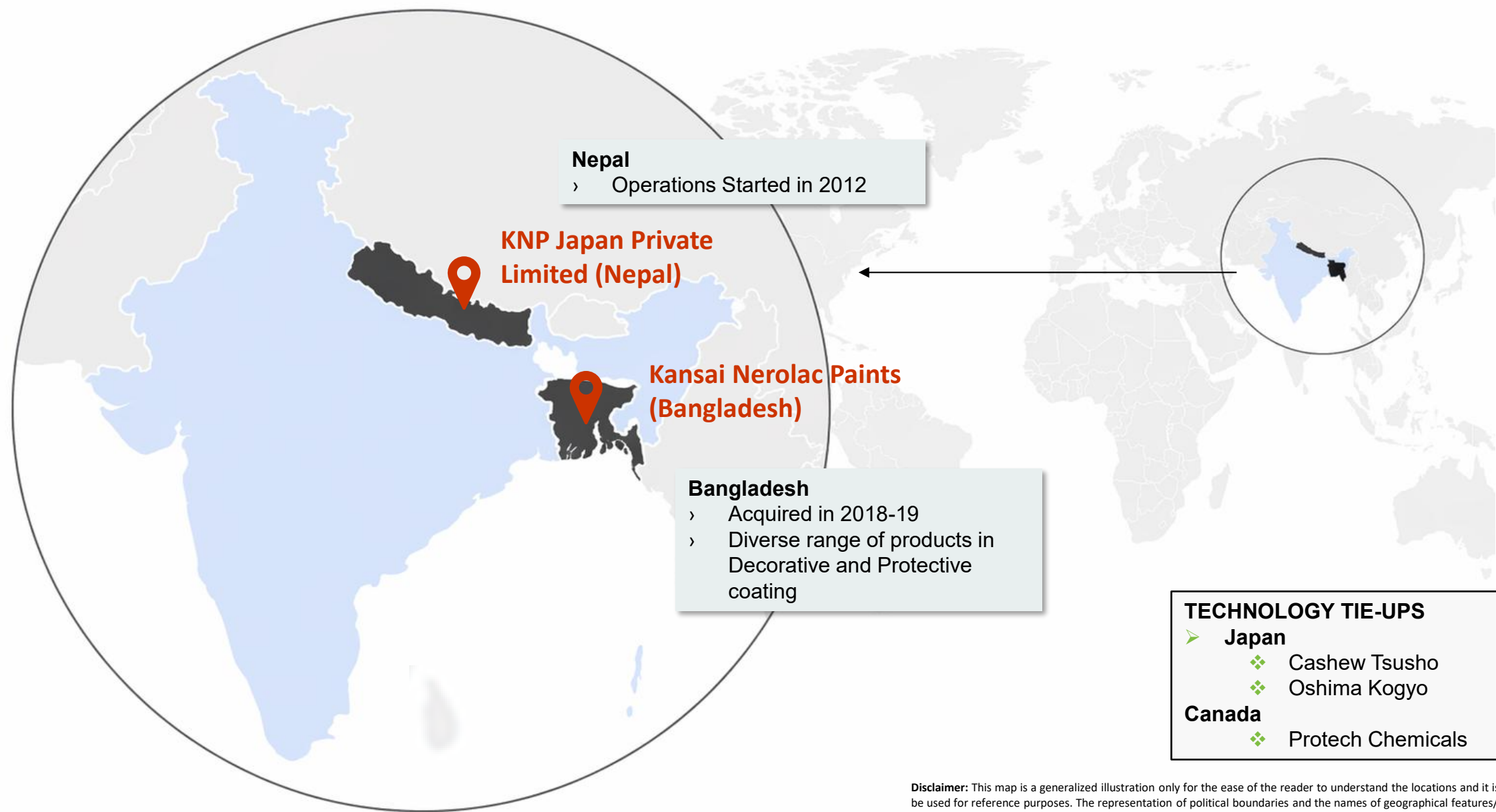
8

Regional Distribution
Centers (RDCs)



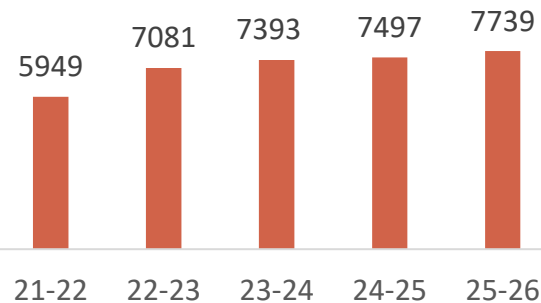
Disclaimer: This map is a generalized illustration only for the ease of the reader to understand the locations and it is not intended to be used for reference purposes. The representation of political boundaries and the names of geographical features/states do not necessarily reflect the actual position. The Company or any of its directors, officers or employees, cannot be held responsible for any misuse or misinterpretation of any information or design thereof. The Company does not warrant or represent any kind of connection to its accuracy or completeness.

International Presence & Tie Ups

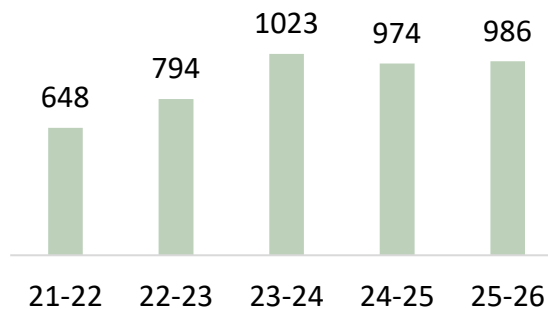


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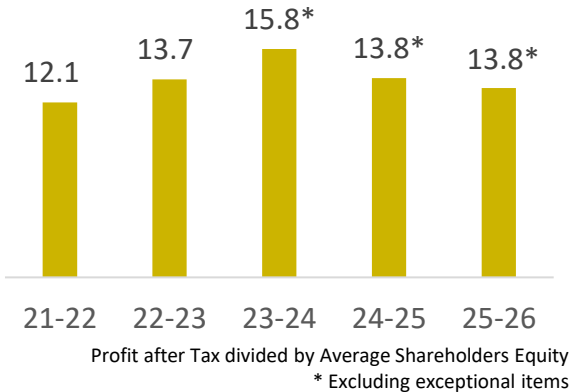
Revenue from Operations (₹ Crores)



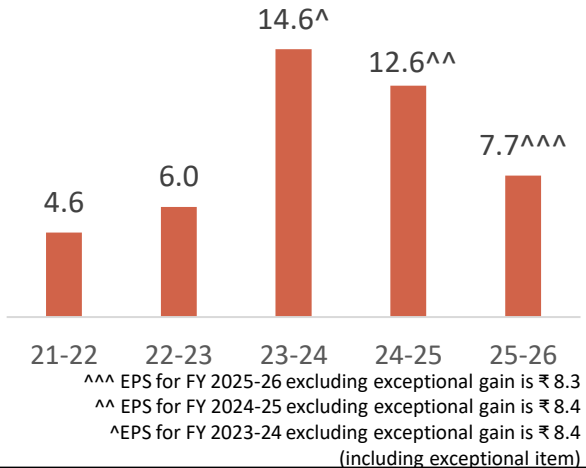
PBDIT (₹ Crores)



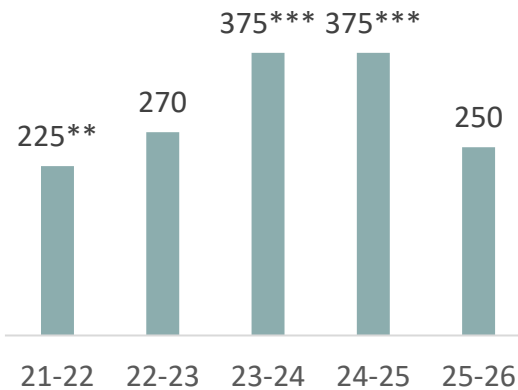
Return on Capital Employed (%)



Basic Earnings Per Share (₹)

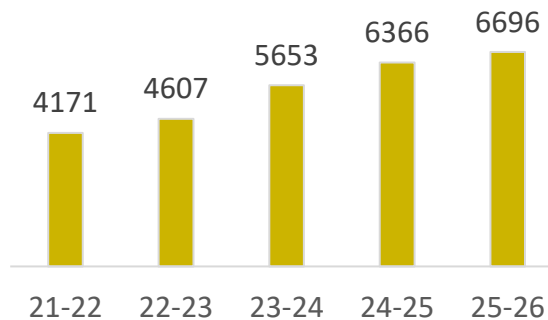


Dividend (%)

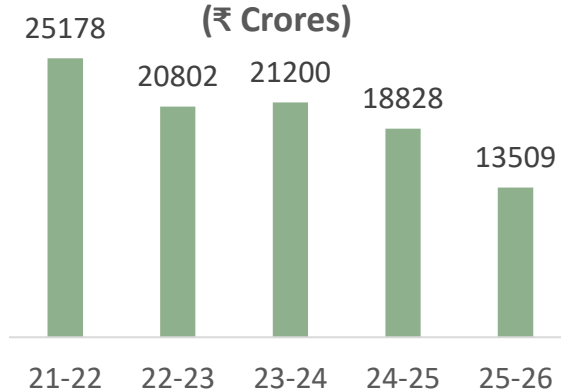


**Includes interim dividend of 125%
***Includes special dividend of 125%

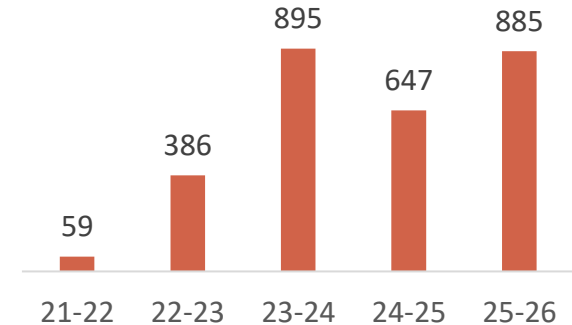
Shareholders fund (₹ Crores)



Market Capitalization (₹ Crores)



Operating Cash Flow (₹ Crores)



DECORATIVE OFFERINGS

UNIQUE & INNOVATIVE PRODUCTS

We are constantly adding to our portfolio in lines with the evolving needs of customers across segments



INTERIOR WALL PAINTS



EXTERIOR WALL PAINTS



WATERPROOFING



WOOD COATINGS



ENAMELS



NEROFIX ADHESIVES

INDUSTRIAL COATINGS

UNDISPUTED LEADERSHIP

Leaders in Automotive Coatings in India and Customised solutions for the unique high-technology requirement of industrial coatings



HIGHLIGHTS FY 25-26

9 Strategically located manufacturing facilities

With 112 Depots and 8 RDCs serving PAN India customers

192 X-matrix

Projects undertaken

11,000+ Kaizens

Received across all plants

26 Awards

Received from CII, QCFI, and other prominent bodies

Certifications	Bawal	Hosur	Jainpur	Lote	Sayakha	Goindwal Sahib	Perma, Sarigam	Marpol, Goa	Vizag
IATF 16949:2016	Yes	Yes	Yes	Yes	Yes	NA	NA	NA	NA
ISO 9001:2015	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	-
ISO 14001:2015	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	-
ISO 45001:2018	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	-
ISO 50001:2018	Yes	Yes	Yes	Yes	Yes	Yes	-	-	-
ISO 46001: 2019	Yes	Yes	Yes	Yes	Yes	Yes	-	-	-

As on 31st March 2026

Year	Annual Capacity (Million Liters)
2024-25	664
2025-26	692

WORLD CLASS MANUFACTURING SYSTEMS:

- MES (Manufacturing Execution System)
- WMS (Warehouse Management System)
- ASRS (Automatic Storage and Retrieval System)
- Modular Paint and Pigment Production (MoFa) Technology
- Closed Pneumatic Conveying System for Powder Conveying
- Bar Coding & Robotic Palletisers
- Latest Bells to Simulate Line Conditions for Auto, HSPMs, amongst others

CAPACITY ADDITIONS:

We undertook the following capacity additions in the reporting period to meet the increasing customer demands and align our investment plans

- **Jainpur** – Extended capacity for Water-based paints
- **Sayakha** – Enhanced capacity for Cathodic Electro Deposition (CED)
- **Internal Capacity Creation** – Through debottlenecking, resource utilisation, new technology and innovative projects

HIGHLIGHTS FY 25-26

₹ 54.32 Crores

Were invested in R&D during the year

27 Patents

Filed in total, out of which 14 were granted

1 R&D Centre

Dedicated R&D Centre in Navi Mumbai

5 Satellite R&D Centre

At respective plant locations (Bawal, Hosur, Lote Liquid, Lote Powder, Sayakha)

1 Colour lab

To create colour shades that help meet customer requirement

Building a Future Ready Organisation:

Empowering Success with cutting-edge R&D infrastructure

Innovation for Impact:

Investing in R&D to create sustainable, user-friendly products

Creating a Competitive Edge:

Continuously developing innovative solutions as per industry demands



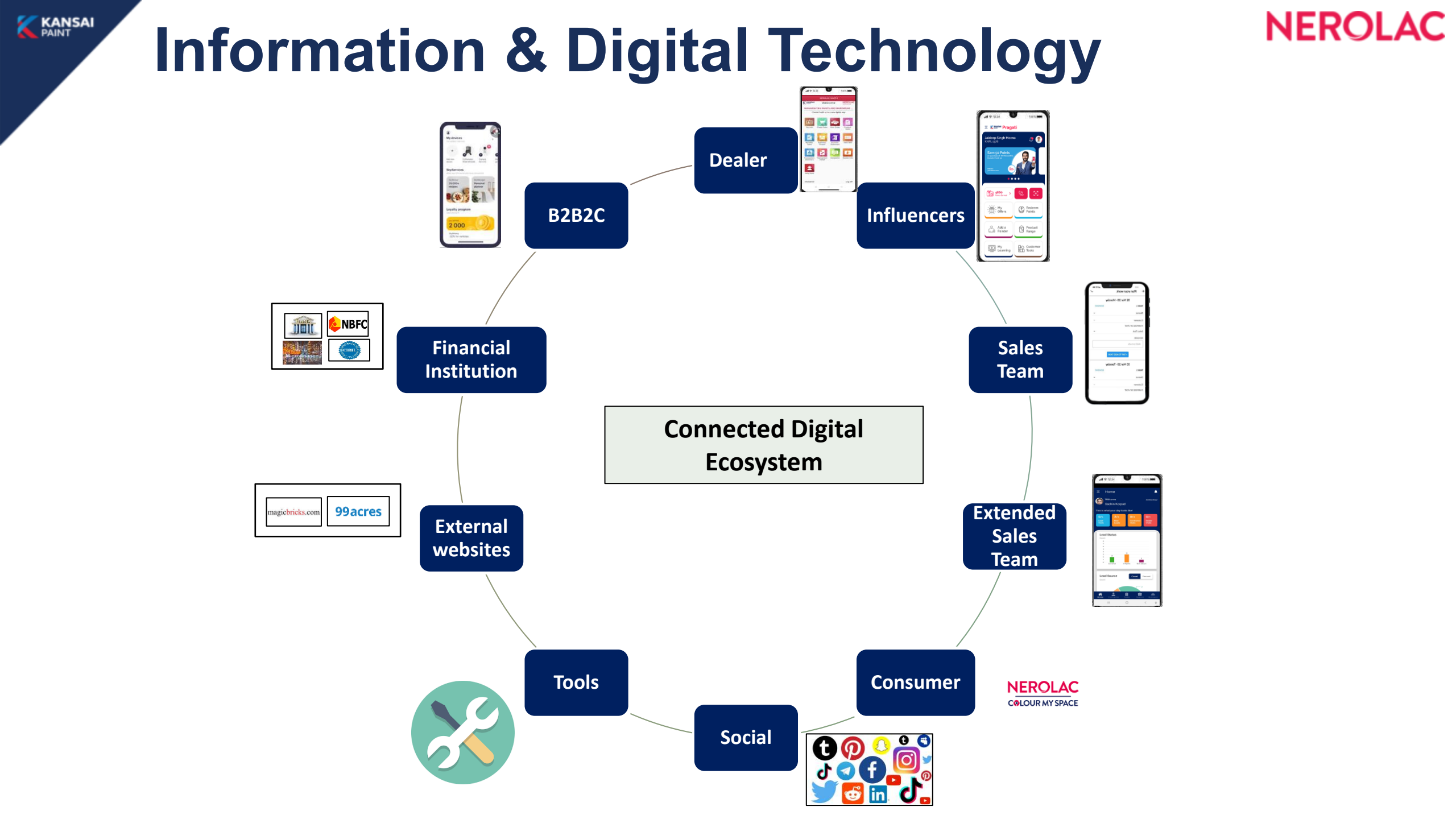
Decorative – Our Edge

- Our Paint+ range addresses shifting customer needs with product attributes that go meaningfully beyond the standard category offering
- We track megatrends in how people build and live to develop coatings with greater longevity and effectiveness



Industrial – Our Edge

- We provide best-in-class technical services directly to our industrial customers, drawing on deep application knowledge
- We develop alongside customers and industry experts, so products are shaped by real world requirements from the start
- We offer cost-effective, tailored formulations built around the specific requirements of individual customers



Launched our Employee Value Proposition

WHERE YOUR PASSION TAKES COLOUR

This year, we introduced our Employee Value Proposition, **'Where Your Passion Takes Colour,'** reflecting our belief that the passion of our workforce is central to everything we do. Through this proposition, we aim to foster a positive environment that encourages growth, ownership, continuous learning and open communication across the organisation.



People – Life @ Nerolac

People Centric Approach



The underlying belief is that success of the organization is strongly connected with its employees' well-being and growth

Life@Nerolac Platform

Employee Engagement Initiatives

Innovation, Collaboration, Empowerment



This multi-disciplinary approach and teamwork ensured a collaborative approach and alignment across functions

Engagement Sessions

Diversity & Inclusion



KNPL understands that diversity and inclusion are both moral imperatives and critical components of our business strategy

Accessibility Audit

Equal Opportunities

Talent Management



Our L&D teams have ensured that our employees receive the necessary trainings by leveraging virtual mediums

Digital Academy Trainings

Campus Collaboration

Employee Wellbeing



Employee wellness is highly valued, and several initiatives have been introduced to support it

Wellness Wednesday

Wellness Corner

Our ESG Approach - Materiality

Environment

Materiality 1: Decarbonisation



- Emission Management
- Energy Management
- Climate Change

Materiality 2: Resource Use



- Water Management
- Waste Management
- Product Stewardship
- Responsible Product
- Sustainable Supply Chain

Social

Materiality 3: Quality of Life



- Occupational Health and Safety
- Community Development
- Employee Engagement and Well-being
- Human Rights
- Customer Satisfaction

Materiality 4: Diversity



- Diversity (Age, Gender, Regional)
- Inclusivity

Governance

Materiality 5: Governance



- Corporate Governance
- Risk Management
- Compliances
- Innovation / IP Management

Our ESG Progress

Decarbonisation

24.5%

Reduction in Scope 1 + Scope 2 emissions since FY2018-19

46.5%

Total energy consumption through renewable energy

45.6 %

Renewable electricity consumption

Resource Use

Water Positive

KNPL maintained water positive status since FY 23-24

33%

Reduction in specific water Consumption since FY 2018-2019

12%

Reduction in specific Hazardous waste generation since FY 2018-19

Quality of Life

1,00,000+

Lives touched through CSR initiatives

Zero

Lost time injury frequency rate

ISO 45001

All major plants certified with ISO 45001

Diversity

>4.6%

Gender Diversity (Excluding Workers)

Inclusivity

Accessibility Audit conducted for HO, Mumbai

Governance

Zero

Non-compliance

ESG

Framework for Corporate Governance on ESG matters with Board Oversight

ISAE (3000)

Assured by a third-party external agency (M/s Aneja Associates)

Recognition

S&P Dow Jones Indices

A Division of S&P Global

Rated in the **Top 12 Percentile** within the Chemical Industry Group in the **S&P Global Large-Midcap ESG Index 2025**



Rated in **"B" Category** in both Climate Change and Water Security in **CDP 2025 Cycle**



KNPL has been awarded a Bronze Medal. This result places KNPL among the **top 18% of companies** assessed by Ecovadis

CRISIL

An S&P Global Company

Recognized in the **"Strong"** Category by CRISIL ESG Ratings 2025



Ranked 19/550 in the chemical industry and received **Low risk** rating indicating lower ESG risk.



FTSE4Good
Ranked in the **Top 12 Percentile** of FTSE4Good Index 2024 Review

Product Certification



19 Products from Interior and Exterior emulsion & Construction chemicals are GRIHA Certified



32 Products from Interior and Exterior emulsions and construction chemicals received the GreenPro Certification

3rd Party Assurance

Limited assurance by 3rd party undertaken in line with the requirements of the International Federation of Accountants (IFAC) International Standard on Assurance Engagement (ISAE) 3000 on selective non-financial disclosures.

Other recognitions

- **Hosur Plant** received the Corporate **Biodiversity Award** for contribution towards biodiversity conservation under the 'Biodiversity Inside the Campus' category from **Tamil Nadu Climate Change Mission**
- **Sayakha Plant** team received the **Gold Award** at the CII National Excellence Practice Competition for presenting the **Fresh Water Reduction Green Initiative**

Awards and Recognition



**Best Raw
Material Supplier
Award**

Toyota Kirloskar
Motors Private
Limited



**Excellence Award
in Paints Category**

Honda Motorcycles



**26 Awards for 'Dukaan-
It-Yourself' campaign at
Mahakumbh**

Goafest, Baby Blue,
Kyoorius Creative
Awards



**Platinum Award –
Future ready factor of
the year**
(Jainpur Plant)

India Manufacturing
Excellence Award
(IMEA)



**Best organization
in Overall EHS
Practices**
(Hosur Plant)

CII National EHS
competition 2026



**Gold Award at
National 3M
Competition**
(Bawal Plant)

Confederation of Indian
Industry (CII)



**Gold Award in Quality
Improvement and
Productivity**
(Bawal Plant)

Quality Circle Forum of
India (QCFI)



**Gold Award for
Productivity and Skill
Enhancement**
(Sayakha Plant)

Annual Convention for
Quality Concepts



Selective List of Customers

Automotive Coatings OEMs	General Industrial	High Performance	Powder Coatings
MARUTI SUZUKI	WHIRPOOL	RELIANCE INDUSTRIES	GODREJ
TOYOTA KIRLOSKAR	KIRBY BUSINESS SYSTEMS	ADITYA BIRLA	HITACHI
HONDA CARS	ZAMIL STEEL	LARSEN & TOUBRO	WHIRPOOL
RENAULT NISSAN	ORIENT FANS	BHARAT PETROLEUM	PANASONIC
MAHINDRA & MAHINDRA	HAVELLS	INDIAN OIL	BAJAJ AUTO
TATA MOTORS	BALMER LAWRIE	JSW	HERO MOTOCORP
FIAT	PANASONIC	THERMAX	ASHOK LEYLAND
VOLKSWAGEN	STUDDS	BHEL	MINDA
ISUZU	STEELBIRD	AFCONS	USHA
VOLVO EICHER	YKK	SUZLON	JCB
ASHOK LEYLAND	TIRTH AGRO	TATA STEEL	CROMPTON GREAVES
DAIMLER INDIA CV	KOBELCO		POWERICA
FORCE MOTORS	KOMATSU		SIEMENS
HERO MOTOCORP	STI SANOH		
HONDA MOTORCYCLES & SCOOTER	T&D		
TVS MOTORS			
BAJAJ AUTO			
SUZUKI MOTORCYCLES			
YAMAHA			
ROYAL ENFIELD			
TAFE			
SONALIKA INTERNATIONAL			
ESCORTS KUBOTA			

THANK YOU