

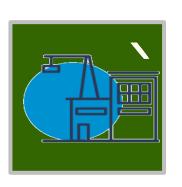


# **KEC International Limited**

## **Corporate Presentation**



Power T & D



Civil



**Transportation** 



Oil & Gas Pipelines



Renewables





**Cables & Conductors** 





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## **RPG Group: Powered by Passion, Driven by Ethics**

# UNLEASHTALENT TOUCHLIVES OUTPERFORM AND ©

RPG Enterprises was founded in 1979. The group currently operates various businesses in Infrastructure, Technology, Life Sciences, Plantations and Tyre industries. The group has business history dating back to 1820 AD in banking, textiles, jute and tea. The Group grew in size and strength with several acquisitions in the 1980s and 1990s. RPG Group is one of India's fastest growing conglomerates with 35,000+ employees, presence in 135+ countries and annual gross revenues of USD 5.2 Bn





Cables



One of India's leading tyre manufacturers



Global technology consulting and IT services company



Integrated pharma company in formulations and synthetic APIs

#### Raychem RPG

Technology solutions company catering to energy and infrastructure



One of India's
largest
plantation
companies
producing tea,
rubber, etc.





## **KEC International : A Legacy of 8 Decades, A Promise of Happiness**











**HAPPINESS SCORE** 

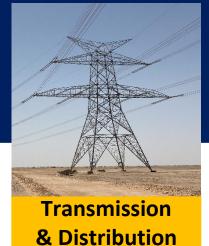


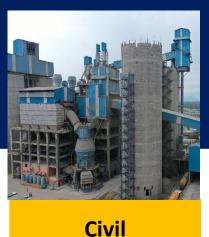
7500+ **EMPLOYEES** 

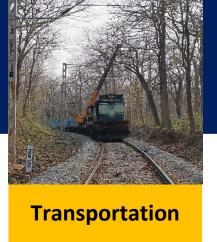


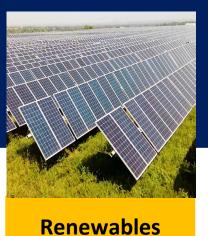
**NATIONALITIES** 



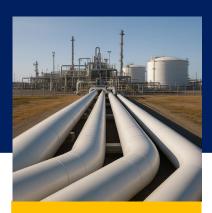




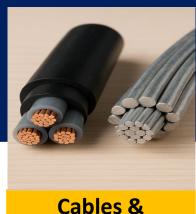








Oil & Gas



**Conductors** 





## **KEC Overview**

- Global infrastructure EPC major
- FY25 Sales: Rs. 21,847 crore (USD 2.6 billion)
- Eight manufacturing facilities across India, Dubai, Brazil and Mexico









## **Diverse Portfolio of Offerings**







**Factories** 



**Underground Cabling** 



Water



**Airports** 



**Hospitals** 



Semiconductor



**Substations** 



**Residential Buildings** 



S&T



Metros - Civil



**Metros - Tech** 



**Commercial Buildings** 



**Petrochemicals** 



OHE



**Track Laying** 



**Railway Bridges** 



**Data Centre** 



TCAS - Kavach



**Automatic Signalling** 



Ropeway



Solar



**Tunnel Ventilation** 



Warehouses



**Defence** 



**Speed Upgradation** 



**HVDC** 



**STATCOM** 



**Cables** 



**Depot & Workshops** 





Oil & Gas Pipelines



Logistics



**Conductors** 





## **Purpose Statement and Culture Pillars**

# "WE TRANSFORM LIVES BY BUILDING SUSTAINABLE WORLD CLASS INFRASTRUCTURE"







## **Board of Directors**



H. V. Goenka Chairman, Non Executive Director



Vimal Kejriwal
Managing Director
& CEO



Arvind Singh
Non Executive
Independent Director



M.S. Unnikrishnan Non Executive Independent Director



Neera Saggi Non Executive Independent Director



Shirish Sankhe
Non Executive
Independent Director



Vikram Gandhi Non Executive Independent Director



Vimal Bhandari Non Executive Independent Director



Vinayak Chatterjee Non-Executive Non-Independent Director





## **Management Team**



Vimal Kejriwal

Managing Director & CEO, KEC International Limited



Rajeev Agarwal
Chief Financial Officer



Anand Kulkarni Executive Director -Business Operations



Ganesh Srinivasan President – T&D



Prateek Bhattacharya Managing Director, KEC Asian Cables Ltd.



Nagesh Veeturi Executive Director -Civil



Kaushal Kodesia Executive Director -Transportation



Manjit Singh Sethi Executive Director – Renewables



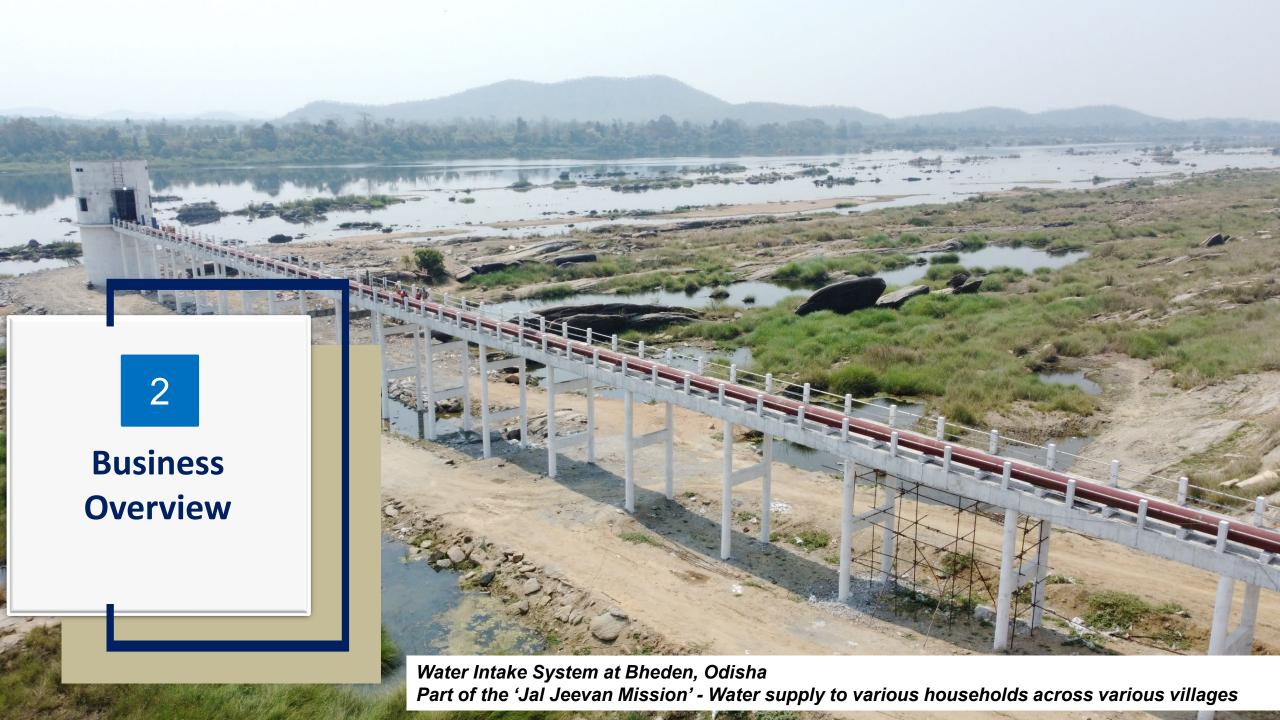
Mayank Agrawal Chief Executive -Oil & Gas Pipelines



Rakesh Gaur CEO – SAE & ED – T&D (Africa & CIS)



Rajinder Gupta Chief Executive – T&D (India & Sri Lanka)







## **Transmission & Distribution (T&D)**





400 kV IBRI-New Rustaq O/H Transmission Line, Oman



132 kV Air Insulated Substation, Papua New Guinea

- One of the largest Power T&D EPC companies; footprint across 75+ countries
- Global leadership with experience of 8 decades
- Integrated solutions on turnkey basis
  - Transmission Lines up to 1,200 kV
  - ➤ Large size substations Air Insulated up to 1,150 kV, Gas Insulated up to 765 kV & Hybrid Substations up to 220 kV
- Leading turnkey provider of Optical fibre cable laying & Optical ground wire stringing
- Strong capabilities in ahead of schedule & on-time delivery of projects
- Successfully ventured into emerging areas of STATCOM, Digital GIS Substations and HVDC terminal stations
- Leveraging robotic process automation, artificial intelligence, and advanced analytical techniques to improve design timeline and costing accuracy for tendering as well as execution.





## **Transmission & Distribution (T&D) (contd.)**





- Leading manufacturer of steel lattice transmission towers in the Americas
- 7 decades of rich and diverse experience in the region
- Manufactures Transmission Towers, Poles, Substation structures and hardware at 2 facilities (Brazil & Mexico)
- Offering comprehensive tower testing solutions
- Expanded hardware portfolio with fittings for OPGW, Crossrope steel wire and Stock Bridge Damping system



**Tower Manufacturing Facility, Brazil** 



**Tower Manufacturing Facility, Mexico** 





## In-house capabilities for turnkey solutions





#### **Design & Engineering**

- In-house design centers with 350+ engineers across eight centres in India, the Middle East and Americas
- >70 years library of transmission lines design database, including towers, hybrid poles and monopoles; expertise across designing substations (AIS, GIS, Hybrid) and solar structures
- Equipped with latest design, detailing and profiling software



#### Manufacturing

- Largest globally operating manufacturing capacity of 4,68,200 MTs p.a. (including Transmission towers, Steel poles, Hardware, Structures for Railways, Solar, and Substations)
- Six tower manufacturing plants 3 in India, 1 in Dubai, 1 in Mexico and 1 in Brazil



#### **Tower Testing**

- Only company in the world to have 4 tower testing stations 3 in India; 1 in Brazil
- Complete testing solutions for all kinds of transmission towers of up to 1,200 kV, including Lattice and Guyed Towers, Tubular Towers and Monopoles





## **Transportation**



- End-to-end EPC solutions (Railways, Metros & Ropeways)
- Proven capabilities in railway electrification (OHE/2x25 kV), track laying, gauge conversion, and civil works
- Expertise in signalling & telecommunication systems including advanced safety technologies like TCAS (KAVACH) and Automatic Block Signalling (ABS)
- Strong portfolio in metro systems covering viaducts, stations, depots, third rail, power supply, and ballastless track laying

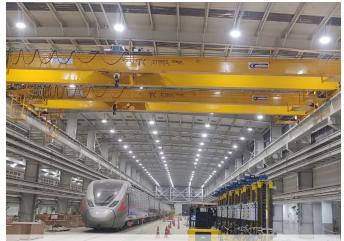
- Experience in tunnel ventilation, MEP systems, and portconnectivity infrastructure
- Pioneer in erecting heavy precast metro superstructures in high-density urban areas
- Entered the ropeway infrastructure segment
- Track record of delivering projects across 21+ Indian states and union territories
- Deep domain expertise, integrated delivery model, and focus on safety, quality, and innovation across all transportation modes



Third Line between Mathura, Uttar Pradesh & Dholpur, Rajasthan



Hubli - Tinaighat Railway Electrification project, Karnataka



Duhai Depot, Delhi-Meerut RRTS project



## **⋙RPG**

#### Civil



- End-to-end EPC solutions across residential, commercial, industrial, data centres, defence, and water infrastructure
- Expertise in delivering high-rise buildings, smart campuses, and complex industrial structures
- Strong execution in water transmission, reservoirs, and treatment plants under national missions
- Early mover in Tier III/IV data centre construction with inhouse MEP capabilities

- Advanced use of digital tools like BIM, Al planning, IoT monitoring, and automated scheduling
- Expertise in modern construction techniques, including precast, aluminium formwork, and modular systems
- Focused on safety, sustainability, and client-centric delivery with growing presence in domestic and international markets
- Executing more than 70 high-rise luxury residential and commercial buildings



Beneficiation Plant at Dariba, Rajasthan



Construction of luxury residential project in Goa



Kochi Metro Rail project, Kerala



## **₩RPG**

#### Renewables



- Comprehensive EPC solutions across Solar, Wind, and Green Hydrogen
- Executing over 500 MWp of solar projects including ground-mounted, rooftop, and carport systems
- Offers integrated services for generation and evacuation, supported by in-house design, civil works, and O&M
- Delivering Wind EPC projects with full Balance of Systems (BOS) and evacuation infrastructure

- Extending capabilities into Green Hydrogen, covering generation, storage, and end-use applications
- Backward integration with in-house manufacturing of mounting structures, cables, and towers
- Strong utility and developer relationships across domestic and global markets, aligned with India's renewable and hydrogen energy goals



150 MWp Ground Mount Solar Project, Rajasthan



20 MW Solar Carport project, Haryana



30 MW Tracker Based Installation, Andhra Pradesh





## Oil & Gas Pipelines





Station Piping Works at Sultanpur-Jhajjar Pipeline Project



**Kandla Gorakhpur Pipeline Project** 

- End-to-end EPC capabilities across oil, gas, slurry, and water pipeline infrastructure
- Expertise in cross-country pipelines, terminal works, process piping, and storage tankages
- Successfully delivered **1,200+ km** of hydrocarbon pipelines across India
- Currently executing **125+ km** of slurry pipelines for a leading private player
- 30+ projects under execution across diverse terrains and geographies
- Expanding presence in Africa with ongoing execution of international pipeline and terminal projects
- Proven capability in laying pipelines ranging from 8" to 32" diameter
- Strong track record in mechanical, civil, electrical, and instrumentation works for terminal stations
- Strengthened offerings through the acquisition of **Spur Infrastructure** in 2021
- Emphasis on **quality, safety, and on-time delivery** through robust project management and supply chain systems

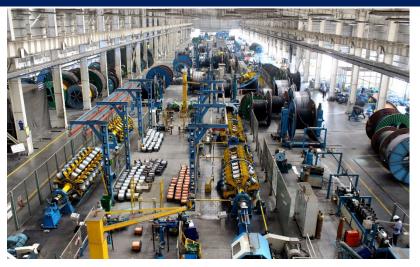


## **₩RPG**

#### **Cables**



- KEC's wholly owned subsidiary KEC Asian Cables manufactures a comprehensive range of power cables, special cables, & O/H conductors
- Product portfolio spans Extra High Voltage (up to 220 kV), High & Low Voltage, Control & Instrumentation, Railway, Telecom, and Solar cables
- Two state-of-the-art, fully integrated manufacturing facilities in Vadodara and Mysuru, India
- Equipped with NABL-accredited lab and DSIR-certified in-house R&D centres for continuous innovation
- Vadodara plant is the first cable factory in India to receive IGBC Green Factory Platinum certification
- Offers customised cable solutions across T&D, Railways, Metro, Renewables, Oil & Gas, and industrial applications
- Manufactures key railway components such as Cu–Ag contact wire, signalling cables, catenary conductors, and dropper wires
- Specialised in niche offerings like hybrid cables, mining cables, cathodic protection cables, and CPR-compliant fire-resistant cables
- Strong presence in both domestic and international markets with a wide base of industrial and infrastructure clients
- Delivers reliable, high-performance cabling solutions aligned with global quality and sustainability standards



Cables Manufacturing Facility at Vadodara, Gujarat



Cables manufacturing unit, Mysore, Karnataka

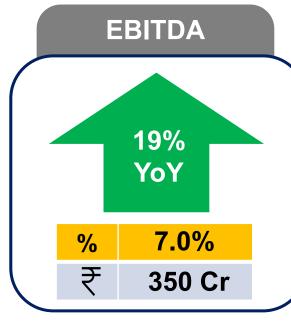


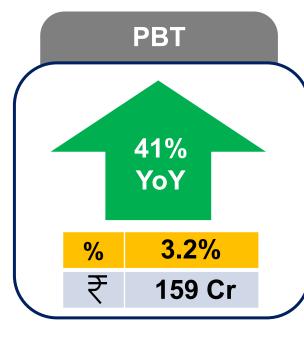


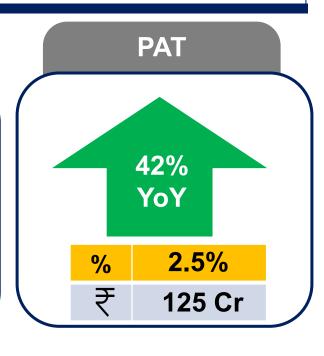


## **Consolidated Financial Highlights Q1 FY26 – Healthy Performance**









Robust execution in T&D business, both in India and international

T&D segment's contribution to overall revenues increased to 63%, up from 55% in the same quarter last year EBITDA margins have increased by 50 bps to 7.0% from 6.5% in Q1 FY25

Continues to deliver healthy double-digit EBITDA margins

Reduced interest expenses by 40 bps as a percentage of Revenue to 3.0% from 3.4% in Q1 FY25

PBT margins have increased by 70 bps to 3.2% from 2.5% in Q1 FY25

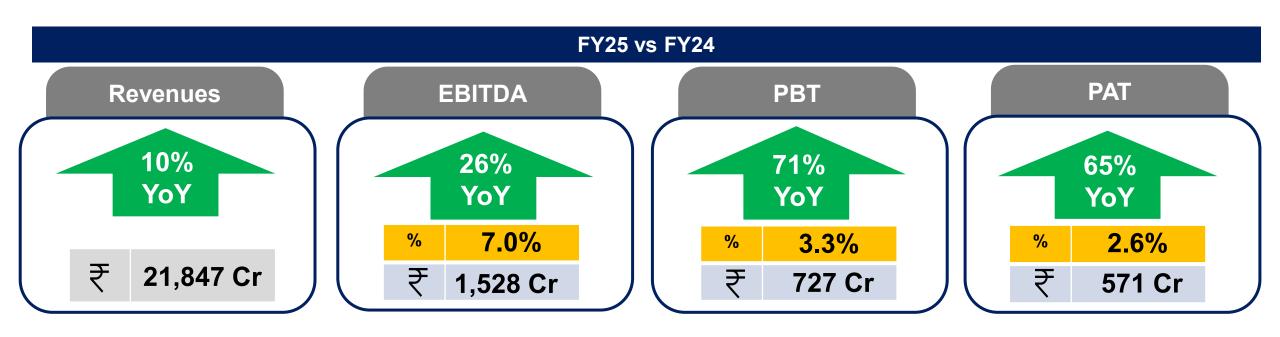
Robust growth in bottom line

PAT margins have increased by 60 bps to 2.5% from 1.9% in Q1 FY25





## Financial Highlights FY25 – Growth Across Parameters







## **Key Business Highlights – Q1 FY26**



#### T&D

- Revenues of Rs. 3,157 Cr, growth of 26% YoY
- •Order intake of over ~Rs. 3,200 Cr across India, Middle East and Americas
- Initiated capacity expansion at Butibori tower manufacturing facility post successful expansions in Dubai, Jaipur and Jabalpur
- Robust order & L1 of ~Rs. 26,000 Cr



#### Civil

- Revenues of Rs. 940 Cr execution impacted by continued labor shortages and delayed payments in water projects
- •Order inflow of ~Rs. 2,100 Cr+ in Buildings & Factories segment
- Strong order book & L1 of over Rs. 10,000 Cr



#### **Transportation**

- Revenues of Rs. 471 Cr
- Kavach
- Executing orders for the deployment of KAVACH across ~500 tkm, in partnership with our JV partner
- Well placed to secure additional orders
- Focus on fast-tracking completion of existing projects & collection of receivables



#### Cables

- Revenues of Rs. 383 Cr.
- Commissioned Aluminium Conductor Plant;
   initiated process of doubling the capacity
- Capex for E-Beam facility and Elastomeric cables is progressing well



#### Renewables

- Revenues of Rs. 136 Cr, growth of 87%
- Executing two large solar projects in Karnataka & Rajasthan
- Continue to bid for select opportunities in Solar, Wind and Battery Energy Storage Systems (BESS)



#### Oil & Gas

- Won 2<sup>nd</sup> international order for terminal station in Africa in addition to ongoing pipeline laying project in the region
- Focusing on the international market considering the low tender pipeline and extremely competitive scenario in India





## **Management Commentary**



We have started the year on a strong note by delivering a healthy revenue growth, substantial increase in profitability and a reduction in debt levels. Despite headwinds such as persistent manpower shortages and geopolitical uncertainties, we have continued to deliver consistent profitable revenue growth. Profitability has also seen stellar growth, with PBT and PAT both growing by over 40%.

The outlook across major businesses remains optimistic. With a strong focus on execution, a robust and diversified order book & L1 of over Rs. 40,000 crore and a substantial tender pipeline, we are well positioned to deliver sustained profitable growth in the coming quarters.

Vimal Kejriwal

Managing Director & CEO





## **Key Business Highlights – FY25**



#### T&D

- Milestone Revenues of Rs. 12,833 Cr, growth of 23% YoY
- •Significant traction in order intake with a staggering growth of over 60% Orders Intake of ~Rs. 18,000 Cr
- Expanded tower manufacturing capacity in Dubai, Jaipur and Jabalpur plants by 46,000 MTPA



#### Civil

- Revenues of Rs. 4,483 Cr
- •Order inflow of over Rs. 2,400 Cr+ in industrial, residential building & Defence
- Diversified customer base adding renowned clients in the industrial & residential segments
- •Strong order book & L1 of ~Rs. 10,000 Cr



#### **Transportation**

- Revenues of Rs. 2,112 Cr
- Order intake of ~Rs. 2,200 Cr maiden orders in Ropeway and Gauge conversion segments
- Kavach
- ✓ Successfully completed 1st TCAS project
- ✓ Secured additional orders
- Focus on fast-tracking completion of existing projects & collection of receivables



#### Cables

- Transferred Cables business to KEC Asian Cables Ltd., a WOS of KEC, wef Jan 1<sup>st</sup>, 2025
- Highest ever Revenues, Order Intake and Profitability
- Commissioned Aluminium Conductor Plant;
   initiated process of doubling the capacity
- Capex for E-Beam facility and Elastomeric cables is progressing well



#### Renewables

- Revenues of Rs. 853 Cr, growth of 90%+
- Execution of the two large solar projects in Karnataka & Rajasthan on track
- Started bidding for Wind EPC projects
- Confident of significantly scaling this business in coming years



#### Oil & Gas

- Revenues of Rs. 363 Cr
- Progressing well on the execution of its first international project in Africa
- Widened footprint by securing 1<sup>st</sup> order in composite space (Design, supply & build)
- Focusing on International opportunities





(₹ crore)

## **Profit and Loss Summary - Consolidated**

**Particulars** Revenues EBITDA\* **EBITDA Margins** (+) Other Income (-) Depreciation (-) Interest Interest as % to sales **PBT PBT Margins** Tax Tax Rate % PAT **PAT Margins** 

Q1 FY26	Q1 FY25	Growth (Y-o-Y)
5,023	4,512	11%
350	294	19%
7.0%	6.5%	
5	19	
46	47	
151	155	-2%
3.0%	3.4%	
159	112	41%
3.2%	2.5%	
34	24	
21.4%	21.8%	
125	88	42%
2.5%	1.9%	

<sup>\*</sup>EBITDA for Q1 FY25 includes an amount of Rs. 24 Cr received towards an arbitration award

<sup>^</sup>Wef 1st Jan'25, Cables business has been transferred into a wholly owned subsidiary, KEC Asian Cables Limited and hence its financials have ceased to be a part of standalone numbers





## **Profit and Loss Summary - Standalone**

**Particulars** Revenues EBITDA\* **EBITDA Margins** (+) Other Income (-) Depreciation (-) Interest Interest as % to sales **PBT PBT Margins** Tax Tax Rate % PAT **PAT Margins** 

Q1 FY26	Q1 FY25	Growth (Y-o-Y)
4,030	3,888	4%
197	198	0%
4.9%	5.1%	
8	20	
32	38	
123	137	-10%
3.1%	3.5%	
50	43	15%
1.2%	1.1%	
13	11	
26.0%	25.4%	
37	32	15%
0.9%	0.8%	

<sup>\*</sup>EBITDA for Q1 FY25 includes an amount of Rs. 24 Cr received towards an arbitration award

(₹ crore)

<sup>^</sup>Wef 1st Jan'25, Cables business has been transferred into a wholly owned subsidiary, KEC Asian Cables Limited and hence its financials have ceased to be a part of standalone numbers. On a like-to-like basis, excluding Cables from the previous year's standalone numbers, the Revenue growth stands at 14% YoY.





## **Businesswise Revenue Performance - Consolidated**

(₹ crore)

Particulars	Q1 FY26	Q1 FY25	Growth (Y-o-Y)
T&D:	3,157	2,499	26%
- T&D (KEC)	2,797	2,153	30%
- SAE Towers	359	346	4%
Non T&D:	1,990	2,092	-5%
- Civil	940	1,059	-11%
- Transportation	471	471	0%
- Oil & Gas Pipelines	60	126	-52%
- Renewables	136	73	87%
- Cables	383	363	5%
Inter SBU:	-124	-79	
Total Net Sales	5,023	4,512	11%
T&D Share	63%	55%	
Non T&D Share	37%	45%	





## **Borrowings & Working Capital - Consolidated**

(₹ crore)

Particulars	30-Jun-25	30-Jun-24	Increase/ (Decrease)
I) Net Debt	3,660	3,973	-313
II) Interest Bearing Acceptances	1,689	1,624	65
Total (I + II)	5,348	5,596	-248

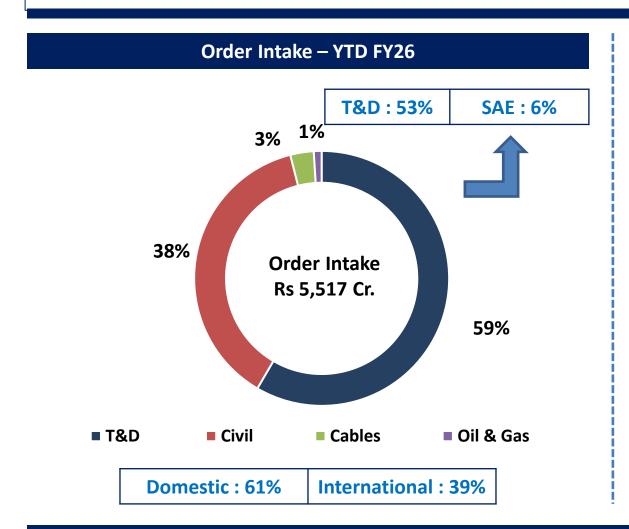
31-Mar-25	Increase/ (Decrease)
3,051	609
1,507	181
4,558	790

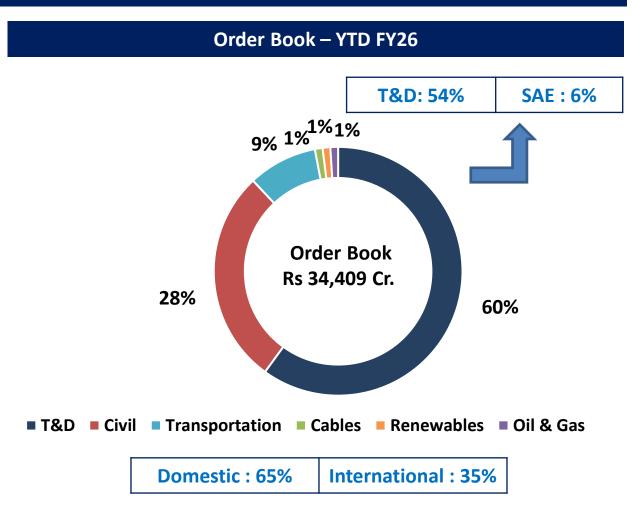
- Net debt including acceptances stand at Rs. 5,348 Cr, a reduction of Rs. 248 Cr vis-à-vis Jun'24, despite a Revenue increase of over Rs. 2,000 Cr i.e. 11% YoY in trailing 12 months
- Net Working Capital (NWC) stands at 128 days vis-à-vis 122 days as on 30 Jun'24. We continue to focus on below initiatives to optimize working capital:
  - Judicious monitoring of cash flows through daily/ weekly war rooms
  - Release of Retention through focused commercial closure of projects
  - Commercial execution of projects thereby reducing dependency receivables
  - Improving quality of order intake Avoiding tenders with adverse payment terms





#### **Order Intake & Order Book - Consolidated**





✓ Robust Order Book + L1 of over Rs 40,000 Crore

✓ Tenders under Evaluation and in Pipeline of over Rs. 1,80,000 Crore





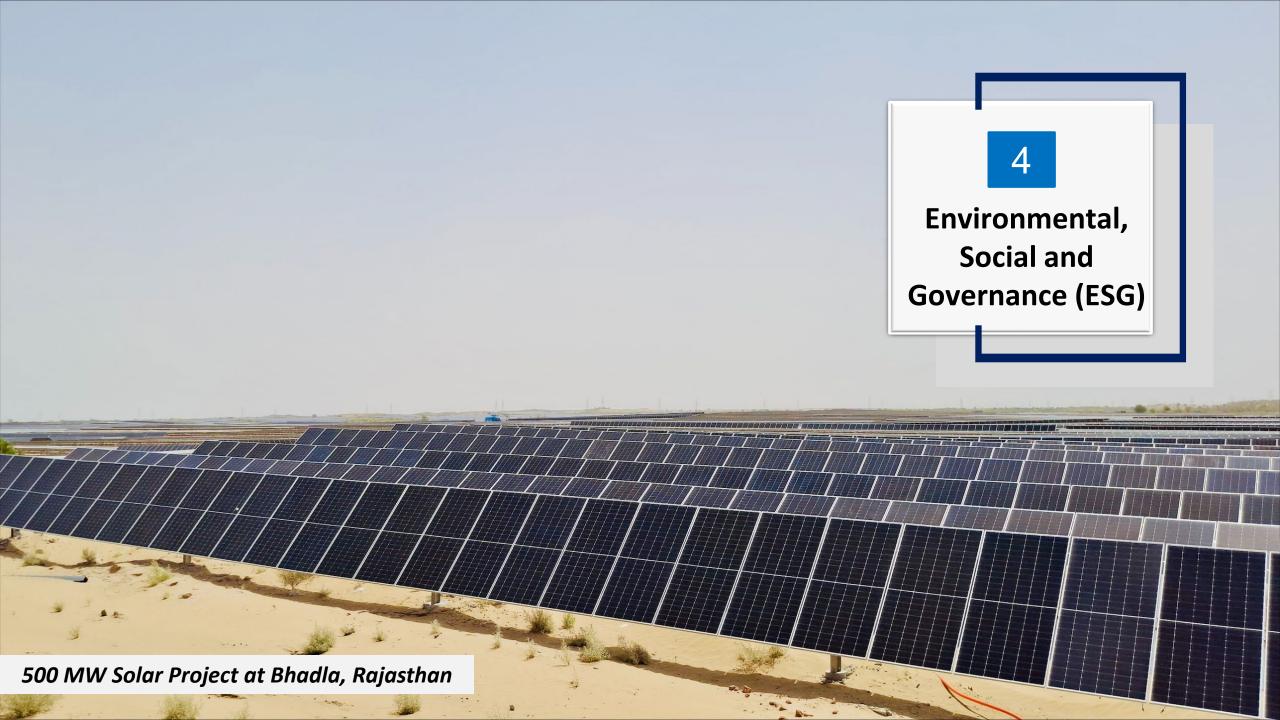
## **Promising Business Outlook**

#### **TAILWINDS**

- Robust T&D Business: ~60% share in YTD Order intake and Order book, driving superior margins
- Strong momentum in T&D continues, driven by renewable energy growth and opportunities in digital substations, STATCOM, and HVDC technologies, with a promising outlook across regions including the Middle East, Africa, CIS, and the Americas
- Real estate boom continues, green shoots in private capex
- Civil execution to pick up: Water segment payments are getting released progressively and execution is picking up
- Cables Growth Strategy on Track: Clear visibility for Revenue growth and Margin enhancement
- Sustained thrust of Govt. on Renewables Substantial opportunities across Solar, Wind, BESS
- International opportunities in Civil, Transportation and Oil & Gas

#### **HEADWINDS**

- Labour availability: Improving trend, though shortages continue to pose challenges
- Subdued performance in Transportation:
  - Margin and cash flow getting impacted by delayed completion of projects
  - Order book continues to be muted due to heightened competition from Road players
- Geopolitical unrests and tariff uncertainties







## **ESG & Sustainability Goals and Status**



# **Happiness Quotient**

**Target:** Increase Happiness Quotient to 85% by FY26

#### **Status:**

Happiness Quotient for FY25 has increased to 84% vis-à-vis 80% for FY21



## Diversity & Inclusion

**Target:** Increase in diversity by 25% by FY26

#### **Status:**

Diversity has increased by 57% in FY25 vis-à-vis FY21



# Occupational Heath & Safety

**Target:** Work towards the goal of achieving Zero accidents

#### **Status:**

LTIFR has reduced to 0.1 in FY25 vis-à-vis 0.68 in FY21, a reduction of 84%



# Corporate Social Responsibility

Target: Reach 2 lac CSR beneficiaries by FY 26

#### **Status:**

Cumulative CSR beneficiaries till FY25 from FY21 are more than 15 lac



#### **Circularity**

**Target:** Zero waste to landfill by FY 26 for manufacturing plants

#### **Status:**

Waste to landfill has reduced by 24% in FY25 vis-à-vis FY21



#### Water Positive Approach

**Target:** Reduce water consumption intensity in manufacturing plants by 20% by FY26

#### **Status:**

Water consumption intensity has reduced by 27% in FY25 vis-à-vis FY21



# **Energy Consumption**

**Target:** Reduce energy consumption intensity of manufacturing plants by 15% by FY26

#### **Status:**

Energy consumption intensity has reduced by 33% in FY25 vis-à-vis FY21



# **Carbon Emission**

Target: Reduce Greenhouse Gas (GHG) emissions intensity of manufacturing plants by 20% by FY26

#### **Status:**

GHG emission intensity has reduced by 27% in FY25 vis-à-vis FY21



# Sustainable Procurement

**Target:** 100% of key suppliers to be assessed under ESG criteria by FY23

#### **Status:**

100% of key suppliers assessed under ESG Criteria





## Sustainability Roadmap - Key Initiatives and Approach



# Happiness Quotient

- KECares 2.0 continues to focus on Holistic wellbeing encompassing Physical, Mental & Financial health
- Action planning workshops being undertaken across SBUs for improving scores



#### **Circularity**

- Implemented zero-based material consumption guidelines across all manufacturing plants
- Pit covers, water tanks, and building foundations have been constructed using waste rebar and tested concrete cubes



- Launched BRIDGE (Building Relationships, Inclusion, Diversity, Growth, and Equity) to foster an inclusive and equitable workplace
- Launched WeCare app for all women colleagues working at project sites



#### Water Positive Approach

- Achieved zero effluent discharge status across all manufacturing plants
- Developed 24 rainwater harvesting wells across project sites with a combined recharge potential of over 2,20,000 KL/year



- Multiple internal and external safety audits, including client and Integrated Management System (IMS) audits were conducted
- KEC EHS Management System has been reviewed and updated



#### **Decarbonisation**

#### Reducing energy consumption & carbon emission

- Transitioning to PNG usage in place of fossil fuels/LPG in plants
- Installing HVDC-charged emergency lighting systems at project sites



- Swayam Farm: 1,500 farmers are undergoing training in regenerative agriculture
- Provided clean cookstoves to 8,000+ underprivileged families in Maharashtra



# Sustainable Procurement

- Formulated the Code of Conduct (CoC) based on sustainability / ESG criteria
- Formulated Sustainable Procurement Policy





# **THANK YOU**



Global Footprint in 110+ countries\*

\*Includes EPC and Supply

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