



## Business Presentation

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Cosmetics & Perfumery



## About Us

Global leader and specialist in **D**esign, **P**roduction and **D**ecoration of glass packaging solutions for:



Pharmaceutical

Beauty

Food & Beverage

## Purpose Statement:

“Enhance the value of the **customer brands** by providing **specialty glass packaging** produced in an increasingly **sustainable environment**”

## Key Drivers of Sustainability:

1. Environment
2. Social
3. Governance





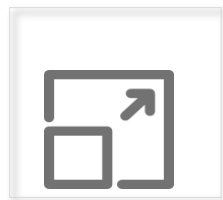
Founded Gujarat Glass

1974



Acquired by Piramal Group

1984



Green-field expansion

1998



Acquisition of CGC, Sri Lanka

1999



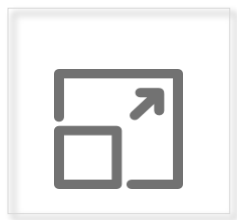
Started making Nail Polish bottles

2000



Started making Perfume bottles

2005



Green-field expansion

2007



One of the world's largest capacities dedicated for Beauty Glass packaging

2015



Certified in 4 consecutive years 2019, 2020, 2021, 2022

2019



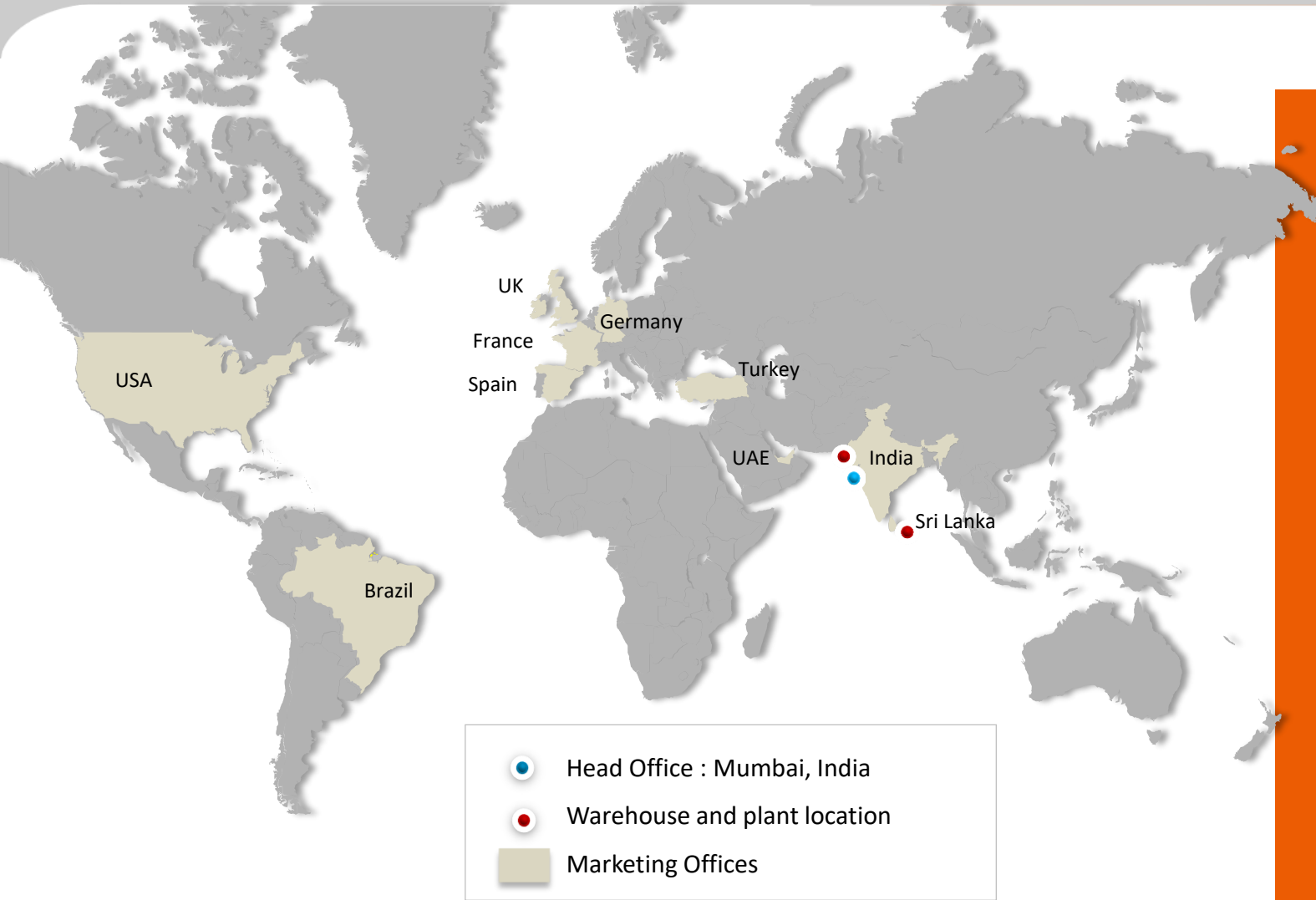
Doubled premium decoration capacity

2019



US-based private equity major Blackstone Group acquired 100% stake

2020



- Head Office : Mumbai, India
- Warehouse and plant location
- Marketing Offices

**Customers in 50+ countries**

Total global production capacity of 1,530 tons per day from 11 furnaces and 64 production lines



**India**

- Kosamba, Gujarat
- Jambusar, Gujarat



**Sri Lanka**

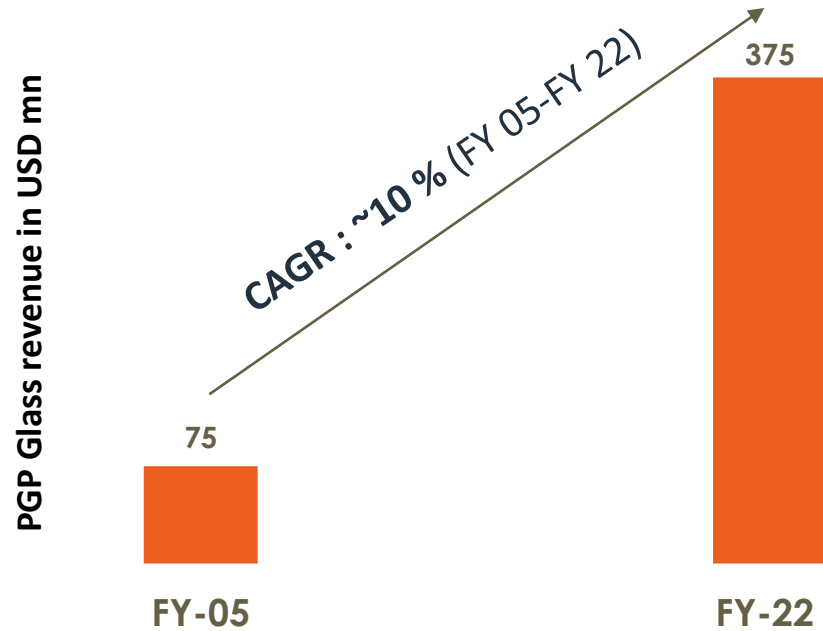
- Ratmalana

**Legend:**

- Cosmetic & Perfumery
- Specialty Food & Beverage
- Pharmaceutical
- Decoration

One of the world's largest production capacities (**705 tons per day**) dedicated for **Cosmetics & Perfumery**





**Our Beauty Business**  
grew at a CAGR of  
**8%**  
(FY12-FY22)

**Our Premium Beauty Business**  
grew at a CAGR of  
**12%**  
(FY12-FY22)

## Our milestones in segments we cater:

### Cosmetic & Perfumery:



A Global leader in Color cosmetics  
Serving majority of the world's top 21 beauty companies

### Pharmaceutical:



Amongst the global top 4 players  
with in-house capability in Type 1



### Specialty Food & Beverage :

Market leader in focus markets





We work with some of the world's best logistic companies



75%

Revenues from exports

600+ containers  
shipped every month

Furnaces designed to minimize emissions



Natural gas used which has less content of Sulphur

4 wind-mills  
Generating a total of 8.4 MW power



5 Rain water harvesting points installed at Kosamba plant



**Effluent Treatment Plant:**  
We do not discharge any effluent water outside. After treating, we use for plantation

**Reverse Osmosis**  
To purify drinking water and distribute to PGP employees' quarters and nearby villages



**Tree plantations (2500+)** to create an ecological balance

Women Empowerment



Education



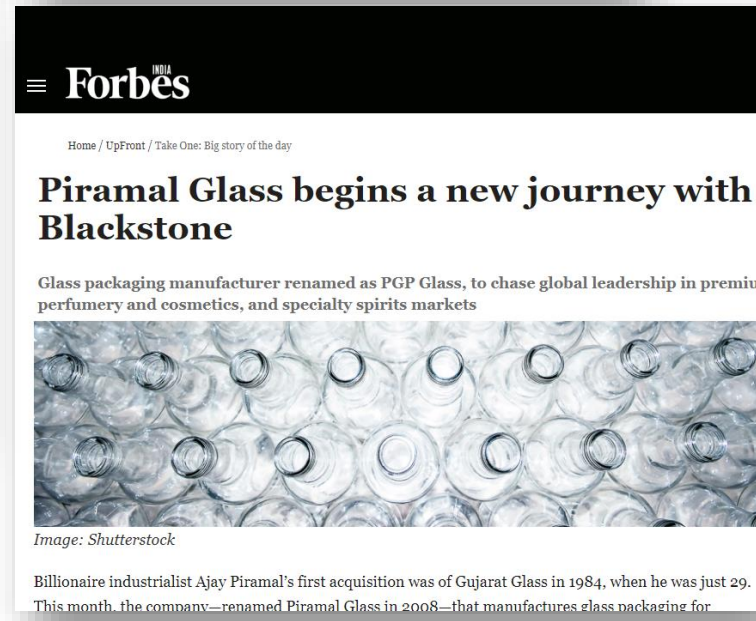
Health-care







Microsoft CEO, Satya Nadella showcases RTMI, Piramal Glass' Smart Manufacturing platform at 'Future Decoded 2020'





Nail Polish bottles



Perfume & Cologne bottles



Diffusers & Car Fragrance bottles



Skin care jars, foundation & Roll on bottles



Caps, brushes & accessories



- 
- |               |  |                           |  |                  |  |          |  |                      |
|---------------|--|---------------------------|--|------------------|--|----------|--|----------------------|
| Printing      |  | Hot-Foil Stamping         |  | Coating          |  | Frosting |  | Decal Fitment/Gluing |
| Metallization |  | Grinding & Hand-polishing |  | Metallic Fitment |  | Sleeving |  |                      |

*A global leader in color cosmetics,*

*with*

**35%**  
*market  
share*



Every 3<sup>rd</sup> nail polish bottle in the world is manufactured by PGP Glass





**Color feeder**



**Fire polishing**



**Complex profiles**



- **Thick Bottom**
- **Heavy-weight**
- **Small MOQ**



**Off-centric neck**



**Thick bottom**



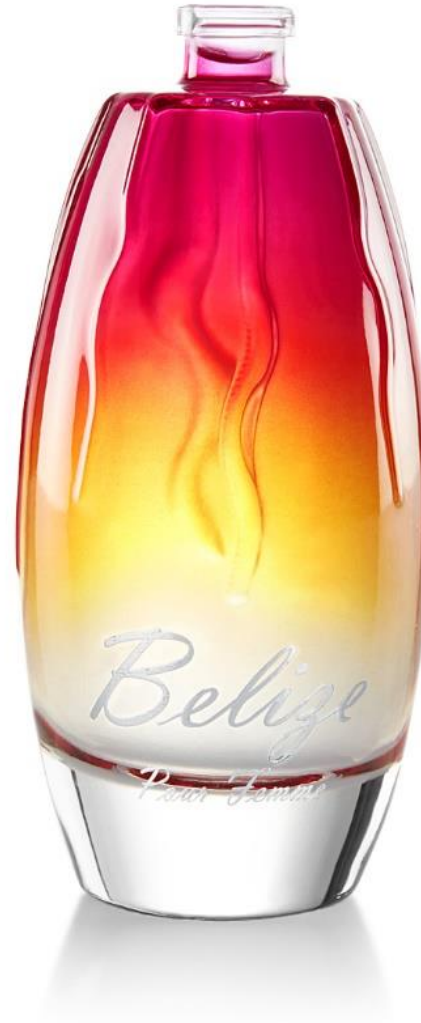
**Tall bottles**

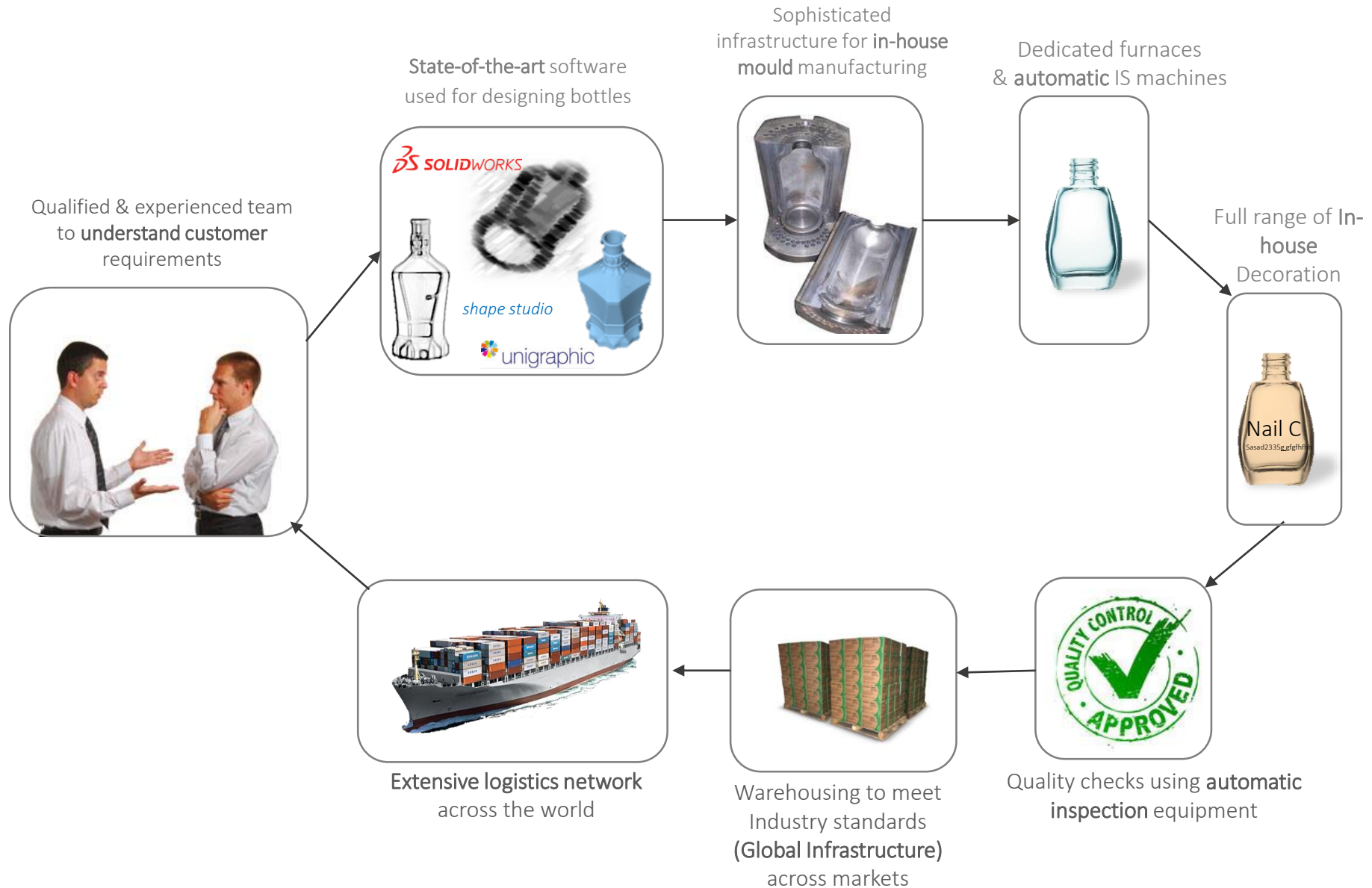
Integrated automated fire-polish facility & hand-polish facility to provide *finest surface finish*

Better, accurate & *stable glass distribution* & solve defects like twisted or crooked neck



Heavy bottle with *bottom as thick as 25 mm*





**Social Accountability**  
SA-8000 : 2015

**2008**

**Occupational Health & Safety**  
BS OHSAS 18001 : 2007

**Environment Management System**  
ISO-14001 : 2015

**2010**

**Primary Packaging for medicines**  
ISO 15378 : 2017

**2014**

**Quality Management System**  
ISO-9001 : 2015

**1996**





**SEDEX – SMETA Audit Certified:**

The Supplier Ethical Data Exchange (**SEDEX**): continuous improvement of ethical performance in supply chains. SMETA ( Sedex Members Ethical Trade Audit) **head-quartered in UK** is Sedex’s social auditing methodology

**PGP Glass, Kosamba successfully cleared SMETA 4-Pillar audit:**

Labor Standards | Health & Safety | Environment | Business Ethics



**CDP (Carbon Disclosure Project) Disclosure:**

- **CDP, Head-quartered in London**, runs the global disclosure system for companies to manage their environmental impacts
- PGP Kosamba started participating in CDP questionnaire since 2020
- Questionnaires are in the area of “Water security” and “Climate Change”

Areas	CDP Disclosure Score in 2021
Water Security	B
Climate Change	C



**Ecovadis Platform for Business Sustainability :**

- **Founded in Paris**, Ecovadis provides business sustainability ratings to companies in Labour and Human rights , Environment, Sustainable procurement, Ethics
- PGP Glass, Kosamba has been participating in EcoVadis assessment since 2015
- PGP Glass is EcoVadis 2021 – Silver certified



**PGP overall Score: 58/100 (80<sup>th</sup> Percentile)**

**LCA (Life Cycle Assessment) Study:**

- Life cycle assessment is a methodology for assessing environmental impacts associated with all the stages of the life cycle of a commercial product, process, or service.
- **PGP Glass has completed LCA study** (Cradle to Gate & Cradle to Cradle) in the following areas with the help of CII:
  - Environmental impact of one tonne glass production
  - Environmental impact of 30ml/ 50ml/ 100 ml glass variant bottle production
  - Environmental impact of 100 ml Verveine & 50 ml Lyra Jar glass bottle & Decoration production



1. System upgraded to achieve world class standards with assistance of external consultants
2. State-of-the-art automatic inspection equipment to further enhance capability
3. Digitally transform its manufacturing operations by implementing Real-Time Manufacturing Insights for improved quality output

## Building a winning partnership

- Sustainability as the core of our purpose statement
- One stop solution for cosmetics & perfumery glass packaging
- Trusted by global beauty brands





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## Business Presentation



Thank You