



# THE SANMAR GROUP



Where Integrity Meets Excellence

*Our Vision*

***“Combining integrity with excellence to ensure prosperity to all stakeholders on a continuous basis”***



**Contents**

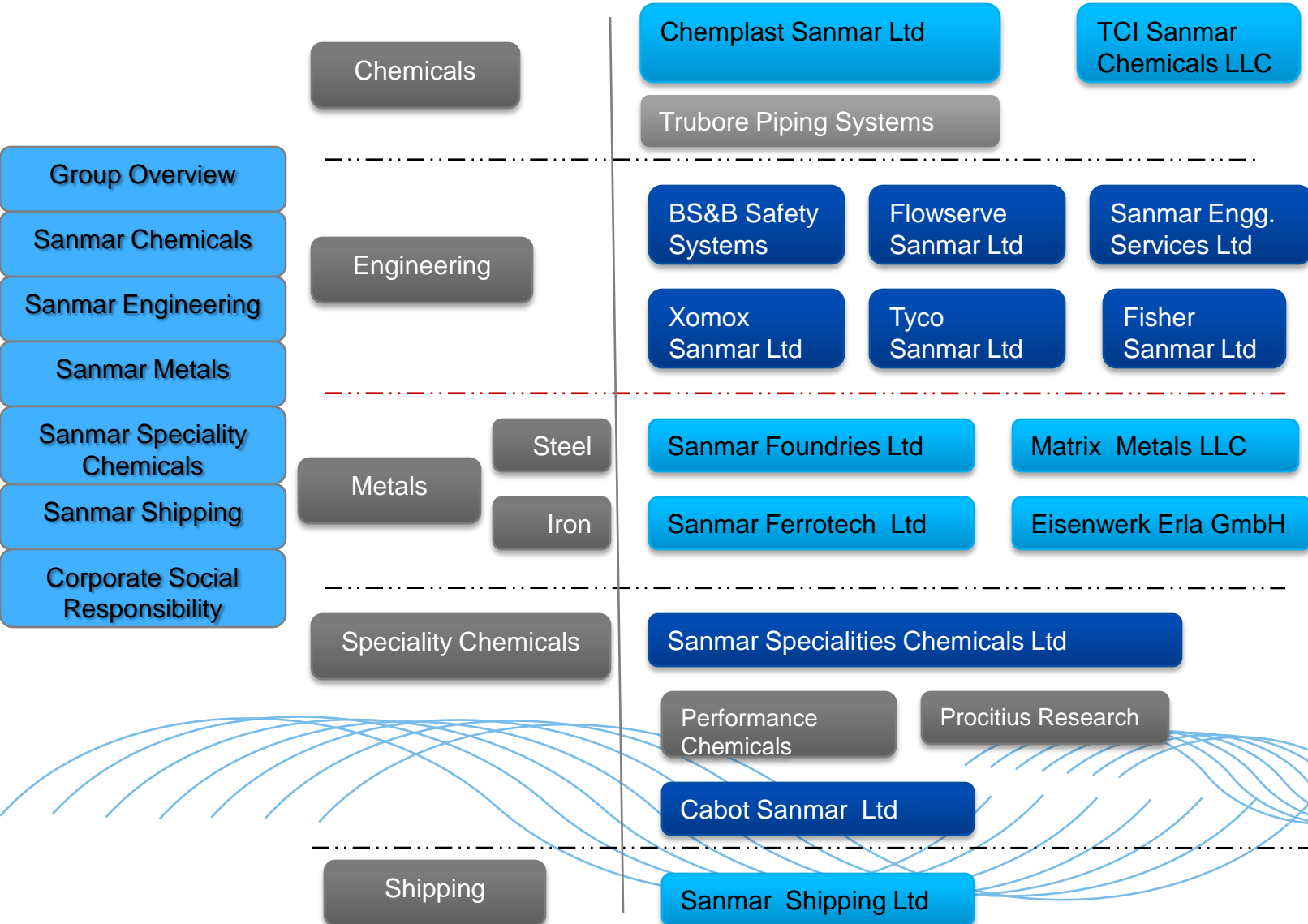
Business  
Overview

Group  
Overview

Corporate Social  
Responsibility



# The Sanmar Group



- Group Overview
- Sanmar Chemicals
- Sanmar Engineering
- Sanmar Metals
- Sanmar Speciality Chemicals
- Sanmar Shipping
- Corporate Social Responsibility



# The Sanmar Group

A US \$ 750 million Group with transcontinental presence





# Who we are

A US \$ 780 million  
Group

## Group Overview

Sanmar Chemicals

Sanmar Engineering

Sanmar Metals

Sanmar Speciality  
Chemicals

Sanmar Shipping

Corporate Social  
Responsibility

Over three decades old, Rs 3,600 crore Group

Investment of over Rs 4,500 crores in progress

Projected turnover of Rs 7,000 crores by 10-11

Presence in Chemicals, Engineering, Metals, Shipping and  
Speciality Chemicals

Well-known for its high ethical standards, long standing joint  
ventures , management strengths and reputation

# Success Drivers

Group Overview

Sanmar Chemicals

Sanmar Engineering

Sanmar Metals

Sanmar Speciality  
Chemicals

Sanmar Shipping

Corporate Social  
Responsibility





# Management Philosophy

- Group Overview
- Sanmar Chemicals
- Sanmar Engineering
- Sanmar Metals
- Sanmar Speciality Chemicals
- Sanmar Shipping
- Corporate Social Responsibility

Set of core values



Good corporate governance

Ownership & management separated.



# Ethics Philosophy

## Group Overview

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Sanmar Engineering

Sanmar Metals

Sanmar Speciality  
Chemicals

Sanmar Shipping

Corporate Social  
Responsibility

How we do things here  
Why we do what we do  
What we do not do  
around here

Policies on ethics and  
guiding principles spelt  
out in a clear cut  
manual.

Ethics  
Philosophy

Appointed Ombudsman as a  
reference point for ethical issues

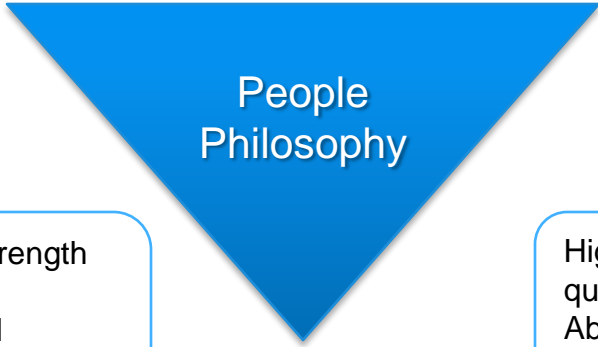


# People Philosophy

- Group Overview
- Sanmar Chemicals
- Sanmar Engineering
- Sanmar Metals
- Sanmar Speciality Chemicals
- Sanmar Shipping
- Corporate Social Responsibility

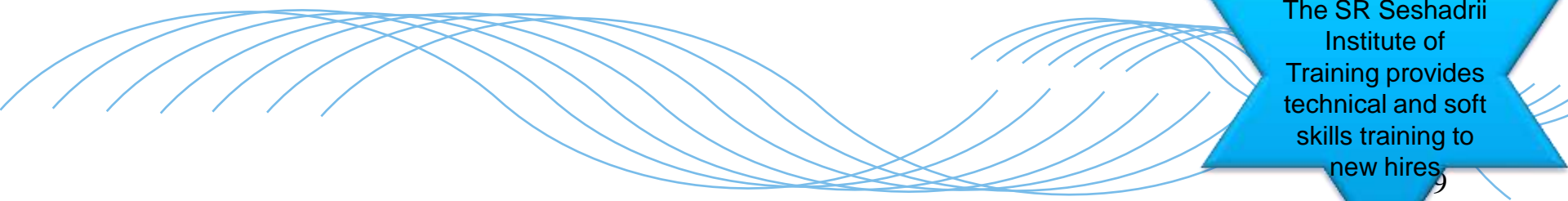
Leading edge HR Practices.

Fair and transparent policies well documented



Total employee strength of 4928 people  
Intellectual capital strength of about 2616 professionals

High employee loyalty quotient  
Ability to hire and retain best talent



# The Driving Force

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Sanmar Chemicals

Sanmar Engineering

Sanmar Metals

Sanmar Speciality  
Chemicals

Sanmar Shipping

Corporate Social  
Responsibility



N Kumar  
Vice Chairman

Vijay Sankar Deputy  
Chairman

K S Narayanan Chairman  
Emeritus



N Sankar  
Chairman



# Decades of JV Relationships

## Group Overview

Sanmar Chemicals

Sanmar Engineering

Sanmar Metals

Sanmar Speciality  
Chemicals

Sanmar Shipping

Corporate Social  
Responsibility

Over 250 man years of successful JV relationships with world leaders

Fair and consistent dealings with JV partners. System based on trust and transparency

Exemplary respect for Intellectual Property Rights (IPR)

## Chairman N Sankar on joint venture relationships

“Both partners should appreciate the need for the joint venture

“They must accept that their gains will flow only from the gains of the joint venture

“The partners should clearly agree on the way the joint venture will be managed

“Both of them must work towards a system based on trust and transparency”



# JV Partnerships

Over three decades of successful JV relationships with world leaders

## JV Partners

## Products/ Services

BS&B Safety Systems LLC, USA

Rupture Disks



Fisher Controls International LLC, USA  
(Subsidiary of Emerson)

Control valves & Regulators



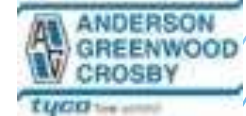
Flowserve Corporation, USA

Mechanical Seals



Tyco International Ltd., USA

Safety Relief valves



Xomox Corporation, USA  
(Subsidiary of Crane Co.)

Valves & Actuators



Pacific Valves

Pressure seal valves



Cabot Corporation, USA

Fumed Silica



Group Overview

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Sanmar Engineering

Sanmar Metals

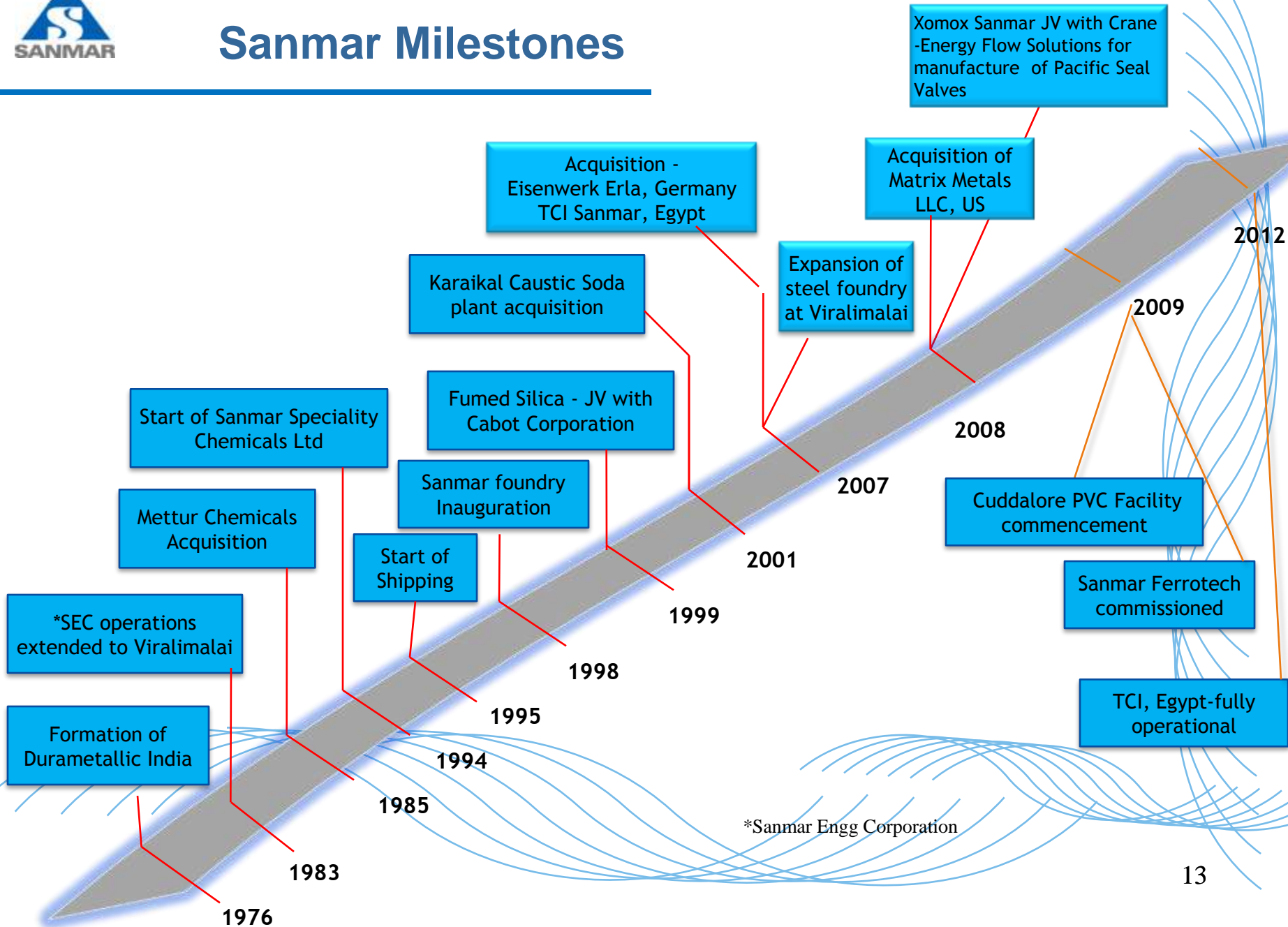
Sanmar Speciality  
Chemicals

Sanmar Shipping

Corporate Social  
Responsibility



# Sanmar Milestones





# Financial Outlook

## Turnover

USD 780 million

Turnover (Rs Mn)



- Group Overview
- Sanmar Chemicals
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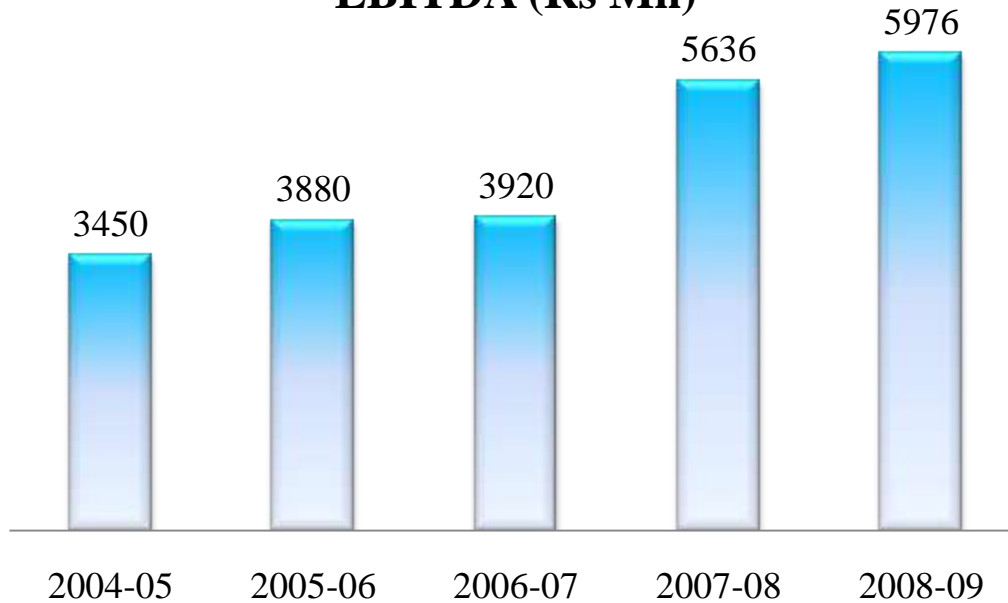


# Financial Outlook

## EBITDA

USD 130 million

### EBITDA (Rs Mn)



Group Overview

Sanmar Chemicals

Sanmar Engineering

Sanmar Metals

Sanmar Speciality  
Chemicals

Sanmar Shipping

Corporate Social  
Responsibility



# Chemplast Sanmar Ltd

- Group Overview
- Sanmar Chemicals
- Sanmar Engineering
- Sanmar Metals
- Sanmar Speciality Chemicals
- Sanmar Shipping
- Corporate Social Responsibility

**PVC**

**Resin**  
Suspension, Paste grade, Battery separator

**Pipes**

PVC Pipes & Conduits

**Chlorochemicals**

**Caustic chlor**  
Caustic soda, chlorine

**Metkem Silicon**  
Silicon Wafers, Polysilicon

**Mettron**  
Refrigerant Gases

**Solvents**  
Chloromethanes



# Chemplast Sanmar Ltd

Group Overview

Sanmar Chemicals

Sanmar Engineering

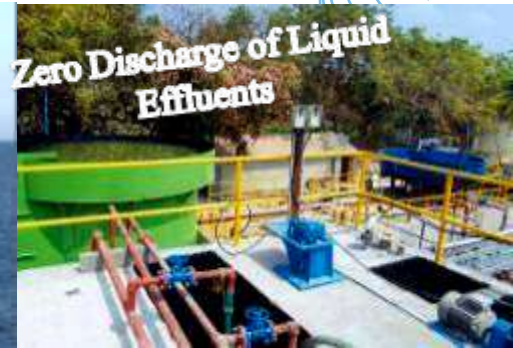
Sanmar Metals

Sanmar Speciality  
Chemicals

Sanmar Shipping

Corporate Social  
Responsibility

- Greenfield state-of-the-art PVC facility at Cuddalore with a capacity of 170,000 tpa commissioned. (Investment Rs 600 crore) Total PVC capacity -235,000 tpa
- Conversion of LSHS-based power plant to a coal-based plant nearing completion
- Switched to the environment-friendly membrane cell production process in the manufacture of caustic soda, well ahead of time
- The first integrated chemical company to commission a unique facility to achieve zero discharge of liquid effluents.
- Commissioning of pipes facility at, Shinoli, Maharashtra. Total capacity for PVC pipes- 56,000 tpa
- Commissioning of the marine terminal facility at Karaikal & Cuddalore





# Chemplast Sanmar Ltd

Greenfield PVC facility-Cuddalore  
commissioned on 21 Sept 2009  
Investment: Rs 600 crore

Group Overview

Sanmar Chemicals

Sanmar Engineering

Sanmar Metals

Sanmar Speciality  
Chemicals

Sanmar Shipping

Corporate Social  
Responsibility

## TRUBORE

Greenfield PVC Pipes facility in  
Shinoli, Maharashtra





# TCI Sanmar Chemicals LLC, Egypt

Products

Chlorochemicals

EDC

VCM

PVC

Group Overview

Sanmar Chemicals

Sanmar Engineering

Sanmar Metals

Sanmar Speciality  
Chemicals

Sanmar Shipping

Corporate Social  
Responsibility

Overseas acquisition for vertical integration and scale up of operations

Strategic location giving easy access to Asia, Africa and Europe

Cost-competitive

EDC, VCM and PVC manufacturing facility under implementation

Caustic soda capacity (275,000 tpa),  
VCM manufacturing facility (capacity 400,000 tpa) and  
PVC facility (200,000tpa)

Opportunity to fully integrate the Group's PVC  
business and position it within the world's top 20

Environment systems being aligned  
to Equator Principles



# Sanmar Engineering Corpn.

Group Overview

Sanmar Chemicals

Sanmar Engineering

Sanmar Metals

Sanmar Speciality  
Chemicals

Sanmar Shipping

Corporate Social  
Responsibility



Focus on operational excellence initiatives such as 5S, LEAN & SIX SIGMA

Strategic player in the global supply chain of JV partners

Strong presence in the power, petrochemicals, refinery and chemicals sector in the domestic and global markets

## JVs





# Sanmar Engineering Corpn.

- Group Overview
- Sanmar Chemicals
- Sanmar Engineering
- Sanmar Metals
- Sanmar Speciality Chemicals
- Sanmar Shipping
- Corporate Social Responsibility

	Products	Constituents
Sealing, Safety & Services	Mechanical seals	Flowserve Sanmar Ltd
	Rupture discs	BS&B Safety Systems (India)Ltd
Valves	In-plant maintenance solutions	Sanmar Engineering Services Ltd
	Control valves & regulators	Fisher Sanmar Ltd Control Valves, Regulators
	Isolation valves & actuators Pressure Seal Valves	Xomox Sanmar Ltd Xomox Valves, Pacific Valves
	Safety relief valves	Tyco Sanmar Ltd



A synergistically integrated group of engineering companies



### Eisenwerk Erla GmbH, Germany

**Products** : High Ni iron alloy castings for turbo charger housing and integrated manifolds

**Application**  
Automobile and refrigeration

**Customer Base**  
Borg Warner, Danfoss, IHI, Audi/VW Group, BMW, Daimler Chrysler, Honeywell, MAN, MTU, Liebherr, Luk



### Sanmar Ferrotech Ltd, Chennai, India

State- of- the- art iron foundry

**Products** : Exhaust manifold, bearing caps, auto components.



Group Overview

Sanmar Chemicals

Sanmar Engineering

Sanmar Metals

Sanmar Speciality  
Chemicals

Sanmar Shipping

Corporate Social  
Responsibility



### Matrix Metals LLC, N. America

**Foundries :** Keokuk Steel Castings, Iowa; Acerlan Foundry, Mexico; Richmond Foundry, Texas(30,000 tpa total foundry capacity)

**Trading arm:** NEPCO International, Houston

**Customer Base:** Caterpillar, Fisher Controls, Emerson, Cooper Cameron, Hitachi, Komatsu, Flowserve, General Electric, E M D, Joy Global, Access Oil

### Sanmar Foundries Ltd, Viralimalai, India

Sand and Investment foundries & Machine Shop

**Steel Foundry Products:** Steel castings - Pressure retaining Valves and pumps castings, couplings, locomotive, transit and construction equipment

**Application:** Flow control, locomotive/transit cars, mining & construction equipment, track and oilfield equipment



Group Overview

Sanmar Chemicals

Sanmar Engineering

Sanmar Metals

Sanmar Speciality  
Chemicals

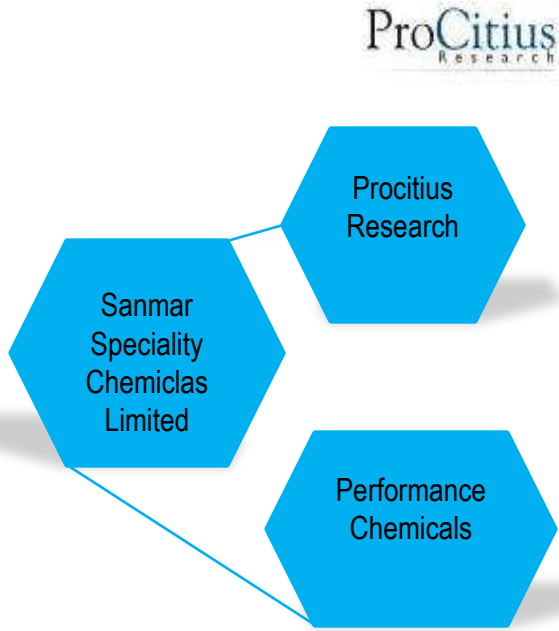
Sanmar Shipping

Corporate Social  
Responsibility



# Sanmar Speciality Chemicals Ltd

- Group Overview
- Sanmar Chemicals
- Sanmar Engineering
- Sanmar Metals
- Sanmar Speciality Chemicals
- Sanmar Shipping
- Corporate Social Responsibility



Certifications across divisions:

- ISO 9001-2000
- ISO 14001 for EMS
- OSHAS Certification

- State-of-the-art facilities
- Qualified talent pool





# Sanmar Speciality Chemicals Ltd

Group Overview

Sanmar Chemicals

Sanmar Engineering

Sanmar Metals

Sanmar Speciality  
Chemicals

Sanmar Shipping

Corporate Social  
Responsibility

Division	Products & Services
Phytochemicals/ Organic Chemicals	Phytochemicals, Chemicals for flavours and fragrances Organic Intermediates for pharmaceuticals
Procitius Research	Contract Research Services Custom Synthesis



# Cabot Sanmar Ltd



Group Overview

Sanmar Chemicals

Sanmar Engineering

Sanmar Metals

Sanmar Speciality  
Chemicals

Sanmar Shipping

Corporate Social  
Responsibility

A JV between Cabot Corporation of USA and the Sanmar Group

Manufactures and markets fumed silica under the brand name of Cab-O-Sil®

Among the first to manufacture the product outside USA, UK, Germany and Japan





# Sanmar Shipping Ltd

Group Overview

Sanmar Chemicals

Sanmar Engineering

Sanmar Metals

Sanmar Speciality  
Chemicals

Sanmar Shipping

Corporate Social  
Responsibility

## The first in the chemical tanker segment in India

Operating in the MR tankers, product tanker, chemical tanker and bulk carrier segments

Associated shipping pools- **TORM** and **Torvald Klaveness** group's **Baumarine** pool

Clientele - Exxon, Mobil, Shell, Chevron-Texaco, Total, Indian Oil, Reliance Petroleum, BP and others

## Quality and Safety Standards

- Compliance to ISM standards for safety, quality and ISPS
- ISO 9000, 18000, OSHAS, TMSA certifications underway





# The Sanmar Group

## Corporate Social Responsibility

Group Overview

Sanmar Chemicals

Sanmar Engineering

Sanmar Metals

Sanmar Speciality Chemicals

Sanmar Shipping

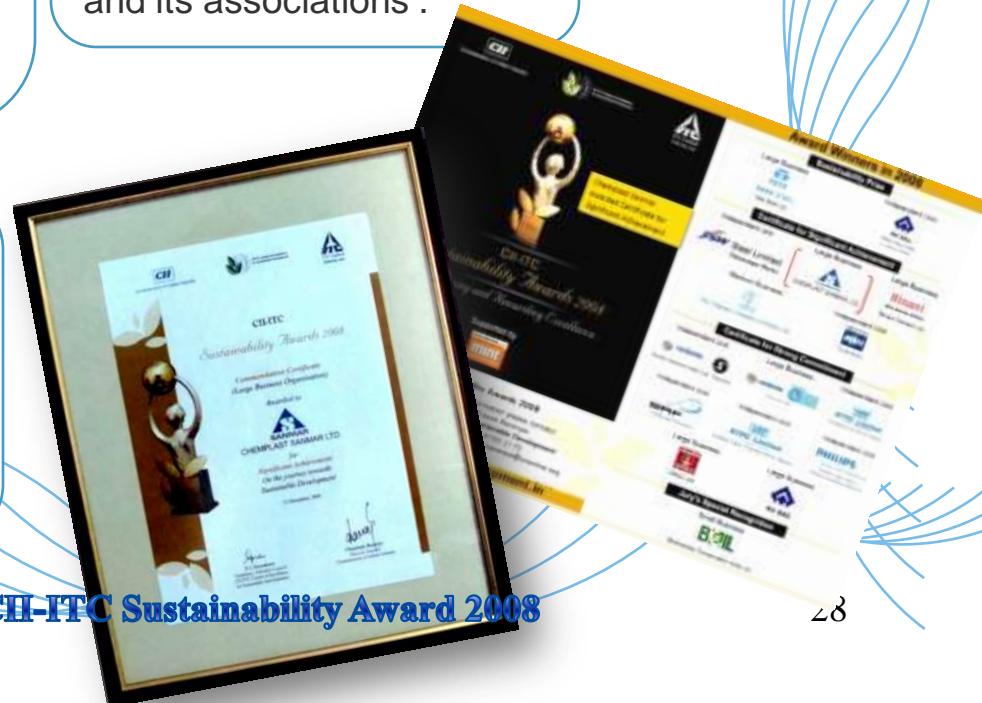
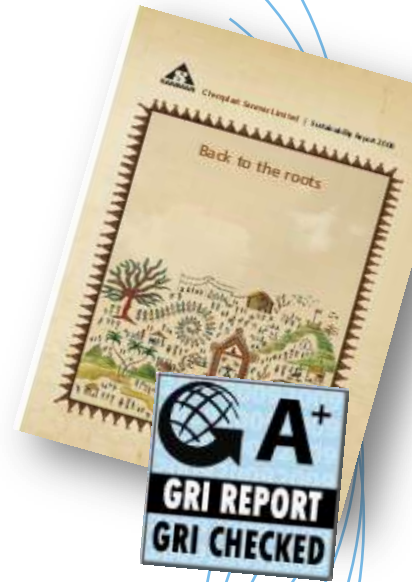
Corporate Social Responsibility

Chemplast Sanmar's second Sustainability Report "Back to the Roots" was assured by Deloitte and verified by GRI

Chemplast Sanmar qualified for the CII-ITC Sustainability Awards 2008 - Received Commendation Certificate for Significant Achievement in Sustainability Practices in the large business category

Sanmar partners with Bombay Natural History Society to establish the Sanmar-Nahar Bird Migration Study Centre at Vedaranyam - the first of its kind in the country.

Support to schools, promotion of sports and the arts and partnerships with industry and its associations .



CII-ITC Sustainability Award 2008

# The Sanmar Group

Greenbelt around facilities



Tennis coaching to children from Corporation schools through Tamil Nadu Tennis Association



Bird migration study centre in association with Bombay Natural History Society constructed



# The Sanmar Group

Madhuram Narayanan Centre for special children





# The Sanmar Group

Support to community welfare through the Madhuram Narayanan Charitable Trust and Madhuram Narayanan Foundation



**Support to orphanage managed by the Sangeetha Charitable Trust**

# The Sanmar Group

Support to health care facilities and research institutes such as Voluntary Health Services, Sankar Nethralaya and Cancer Institute





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Sanmar Metals

Sanmar Speciality  
Chemicals

Sanmar Shipping

Corporate Social  
Responsibility



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