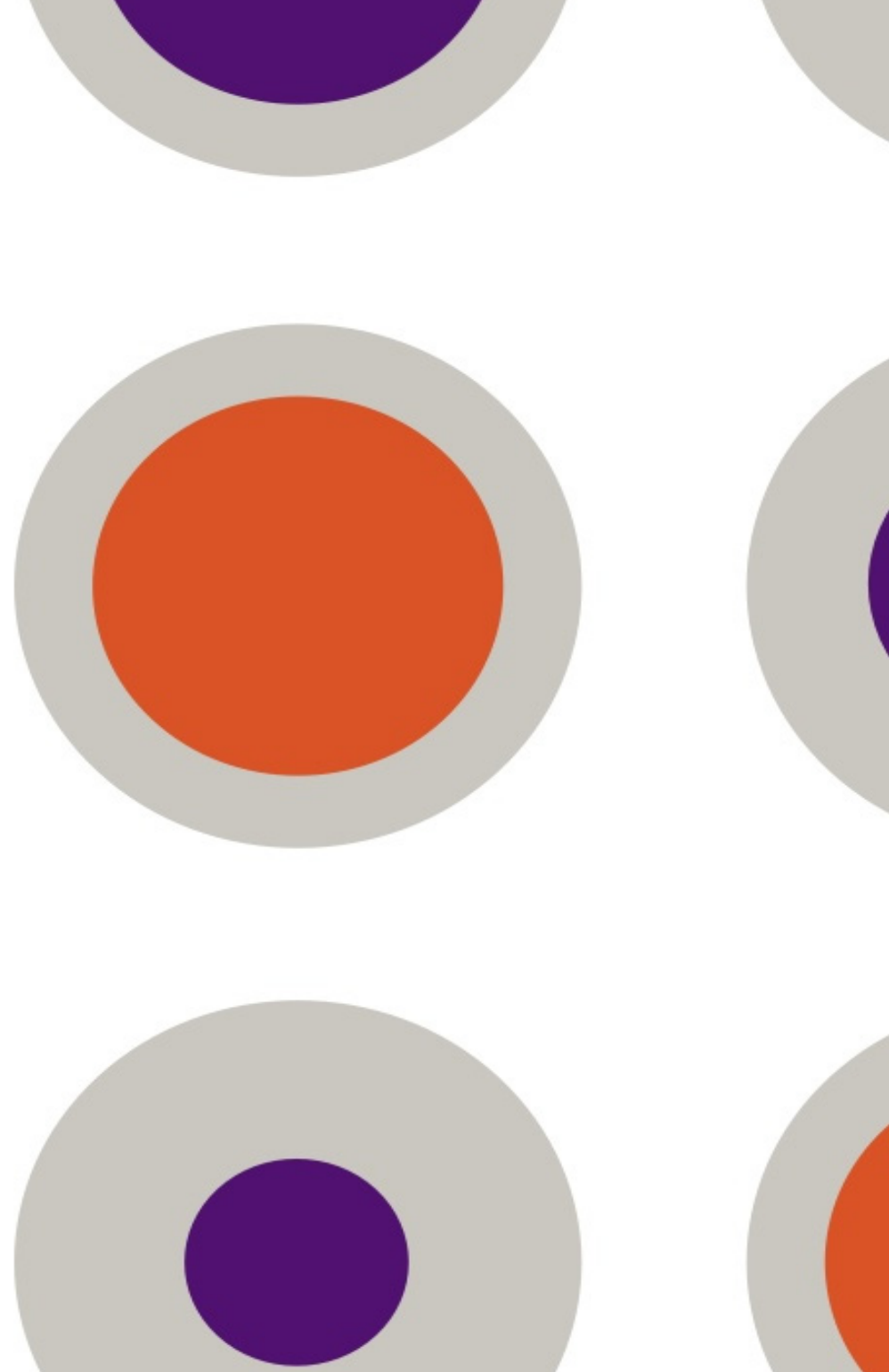


# apollo

**On a Journey  
Around the World.**

34 years young and raring to go!

apolloenergy.com



A silhouette of a person climbing a dark rock formation against a bright blue sky with a large, glowing sun in the upper right. The person is in a dynamic pose, with one leg extended forward and arms supporting their weight. The sun creates a strong lens flare effect across the sky.

# Our Vision





To be a significant player in the **global tyre industry** and a **brand of choice**, providing customer **delight** and continuously enhancing stakeholder **value**.



# Our Core Values



Care for Customer

Respect for Associates

Excellence through Teamwork

Always Learning

Trust Mutually

Ethical Practices



# A 34 years young company!

**1976:**  
Registration of Apollo Tyres

**1977:**  
First plant at Perambra, Kerala

**1991:**  
Second Plant at Limda, Gujarat

**1995:**  
Third Plant Kalmassery, Kerala

**1996:**  
Tubes plant at Ranjangaon, Maharashtra

**2004:**  
India's first H-Rated tubeless passenger car tyre range "Acelere"

**2005:**  
Passenger car tyre capacity expanded to 10,000 per day  
More than 7.5 million "XT-7" tyres sold - single largest brand in India

**2006:**  
April - Acquired Dunlop Tyres Intl. in South Africa  
May - DuraTreads retreading material launched  
Nov - India's first V-Rated tubeless passenger car tyre range "Acelere Sportz"  
Nov - India's first W-Rated tubeless UHP passenger car tyre "Aspire"



**2007:**  
Jan - Launch of "Regal" truck & bus radial tyres  
May - Launch of India's first branded retreaded tyre "DuraTyre"

**2008:**  
Announced greenfield plant in Chennai [Tamil Nadu], India  
Oct - Introduced new corporate identity.

**2009:**  
May - Acquired Vredestein Banden BV in the Netherlands

# Apollo's World





# A responsible corporate citizen

- HIV-AIDS Prevention Clinics
- Eye check-ups for truck drivers
- “Tyre Pressure Check Days”
- “Safe Drive” initiative
- Monsoon Disaster Management
- Emergency Medical Service





# A long-term corporate sponsor





# Our Mission



A journey called “Passion in Motion”  
to be a US\$ 2 billion company  
by the year 2010-11

# The three pillars of our company:





# People our assets



A virtual management knowledge academy for all promising employees



A global team to carry our values across the world.

## A “Learning Organisation”

# People our assets



An online performance and career enhancement system.



“Svago”– The ideal balance between work and pleasure



# A world-class manufacturer



## People

Young, skilled, and sincere.



## Materials

The best the world offers.

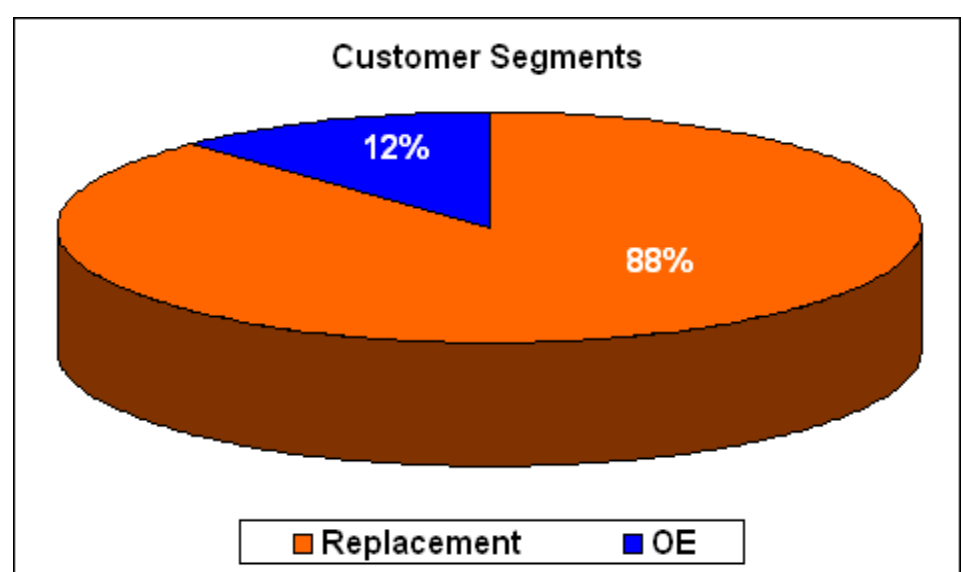
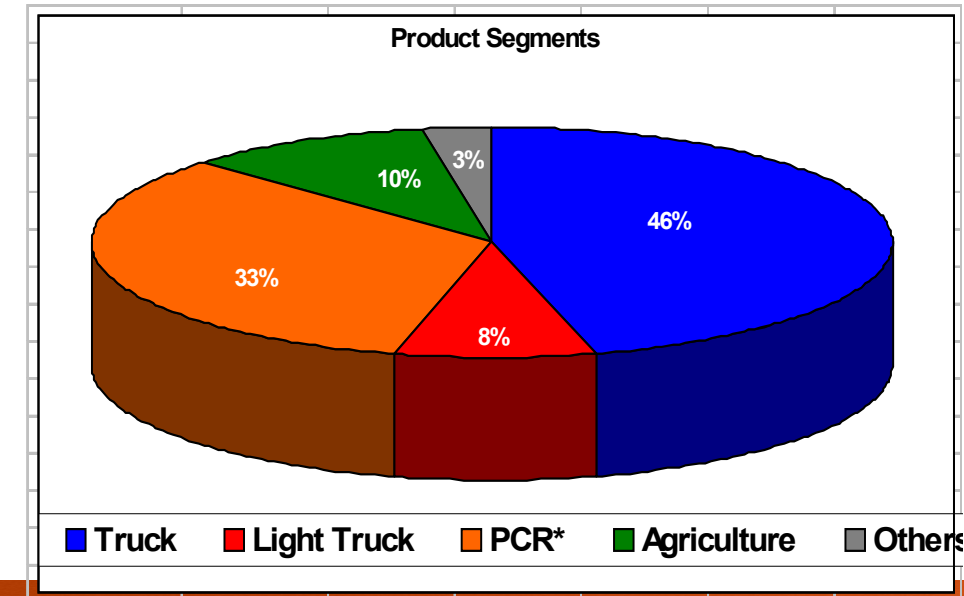
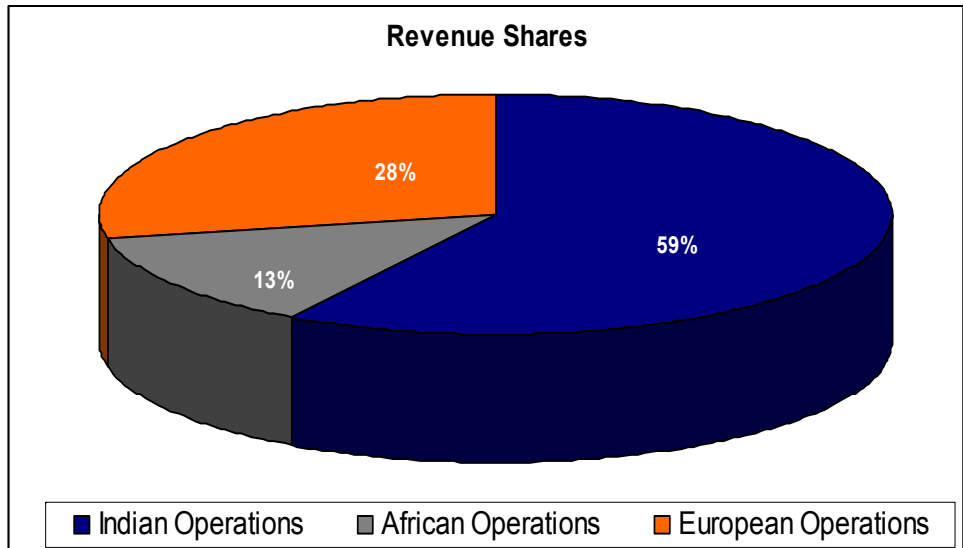
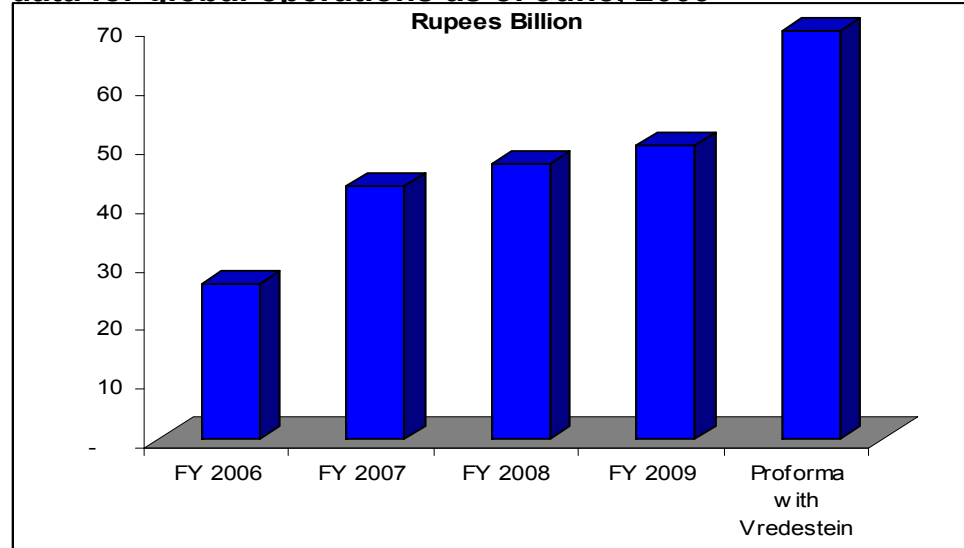


## Machines

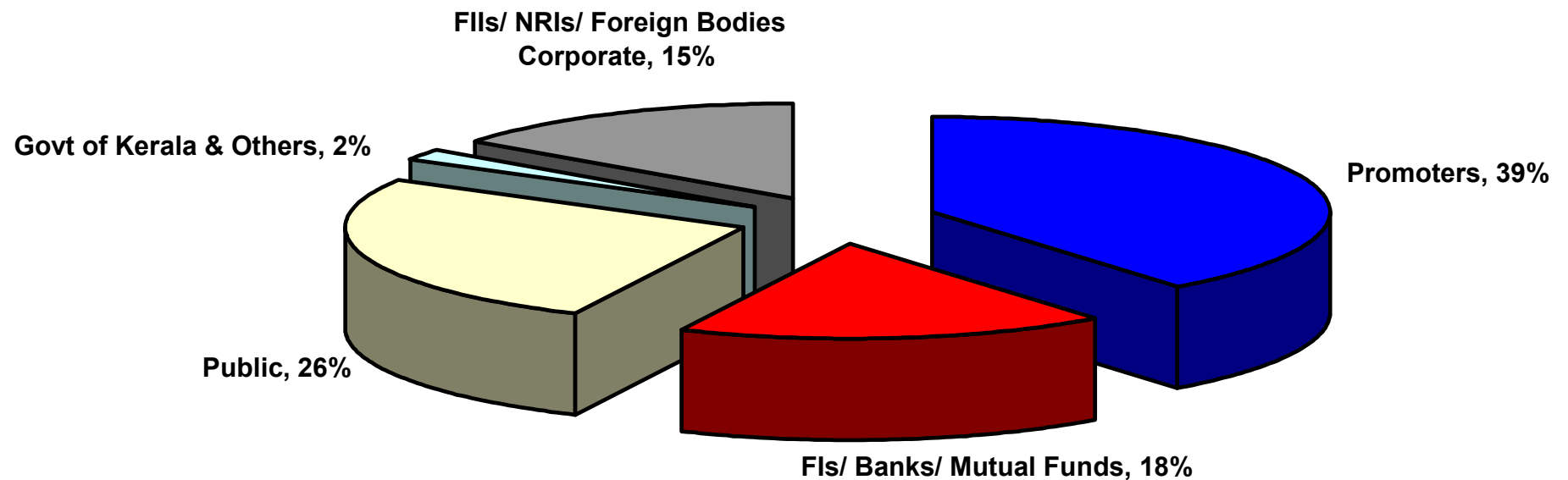
World-class quality assuring consistency.

# Our Global Business Profile

data for global operations as of June, 2009



# The Shareholding Structure





# The Brands to leverage:

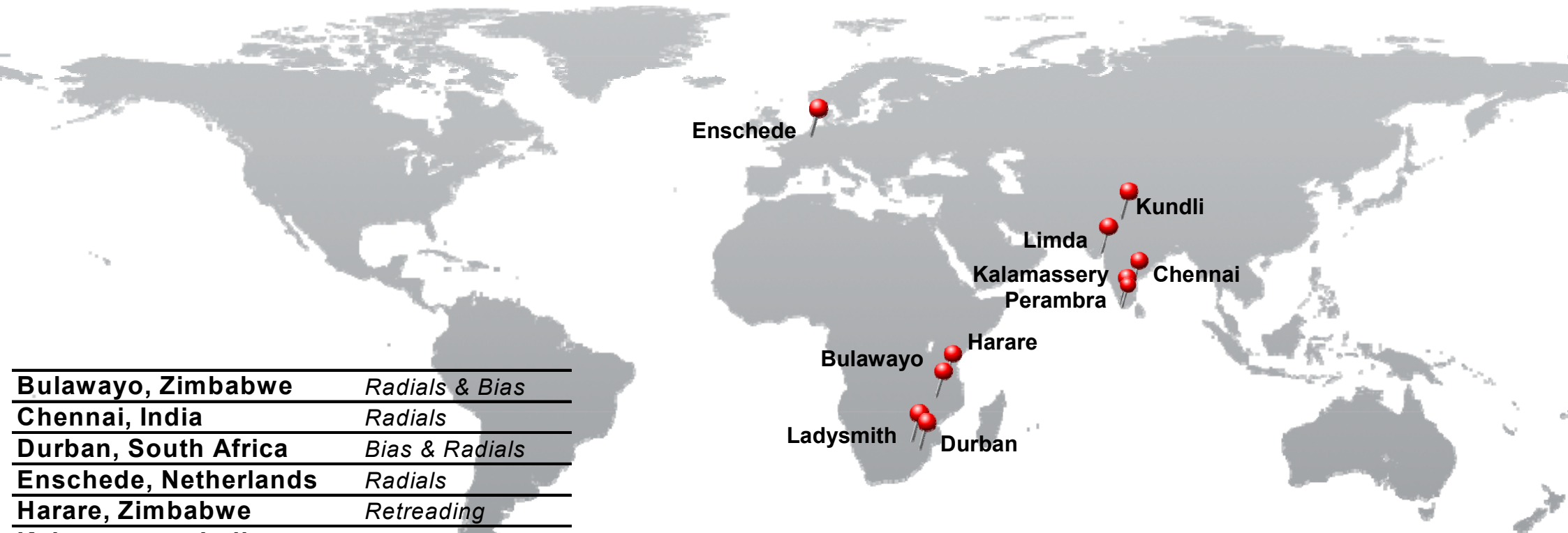
Across the world



In South Africa and select parts of Africa



# Our global manufacturing facilities



Enschede

Kundli

Limda

Kalamassery  
Perambra

Chennai

Harare

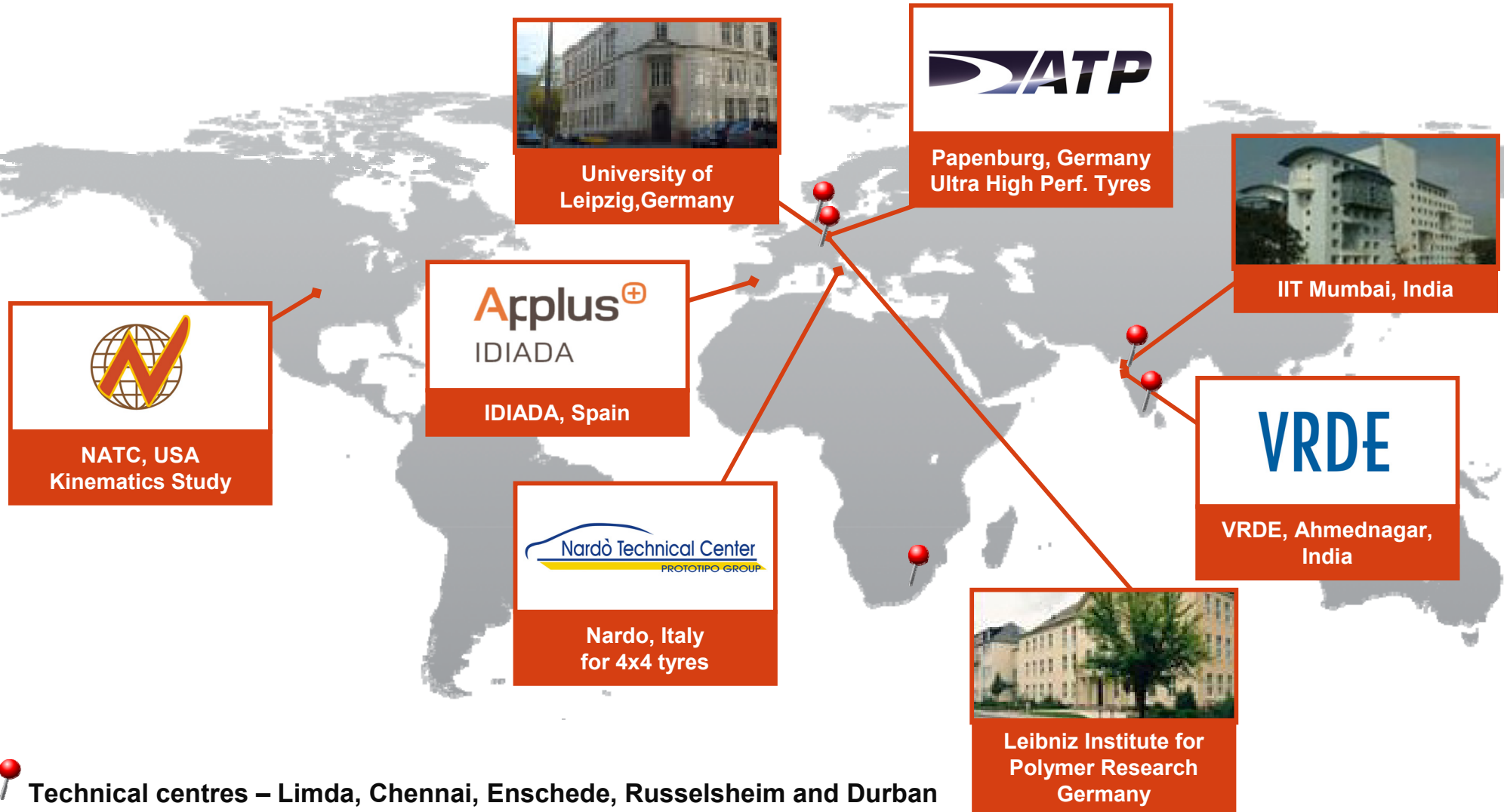
Bulawayo

Ladysmith

Durban

<b>Bulawayo, Zimbabwe</b>	<i>Radials &amp; Bias</i>
<b>Chennai, India</b>	<i>Radials</i>
<b>Durban, South Africa</b>	<i>Bias &amp; Radials</i>
<b>Enschede, Netherlands</b>	<i>Radials</i>
<b>Harare, Zimbabwe</b>	<i>Retreading</i>
<b>Kalamassery, India</b>	<i>Bias</i>
<b>Kundli, India</b>	<i>Retreading</i>
<b>Ladysmith, South Africa</b>	<i>Radials</i>
<b>Limda, India</b>	<i>Radials &amp; Bias</i>
<b>Perambra, India</b>	<i>Bias</i>

# A creator of world-class tyres





# The minds that lead Apollo



**Neeraj Kanwar**  
Managing Director



**K. Prabhakar**  
Chief, Projects



**Luis Ceneviz**  
Chief, South Africa



**P.K. Mohamed**  
Chief Advisor, R&T



**Peter Becker**  
Chief, R&T



**Rob Oudshoorn**  
Chief, the Netherlands



**Satish Agarwal**  
Chief, Manufacturing



**Satish Sharma**  
Chief, India



**Sunam Sarkar**  
Chief Financial Officer



**Tapan Mitra**  
Chief, HR



**U.S. Oberoi**  
Chief, Corp. Affairs



**Onkar S Kanwar**  
Chairman



# 1st 'home' market India

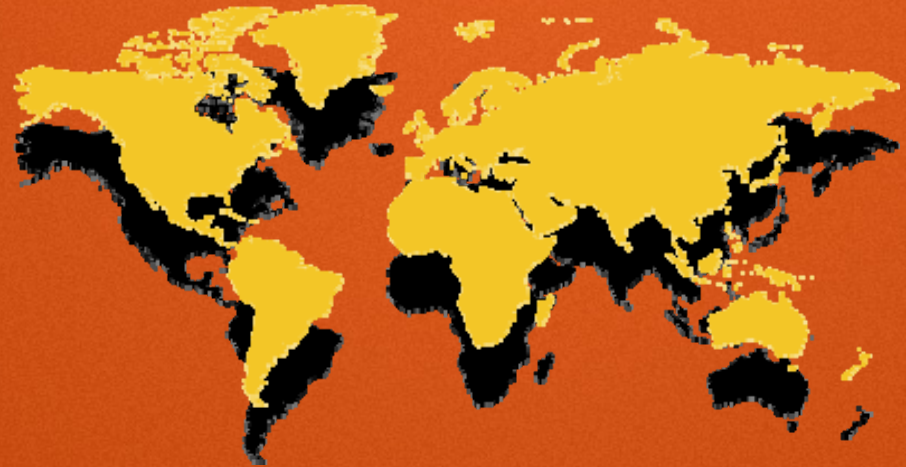




# India's leading tyre brand!



The **First** and **Largest** Indian  
Multinational Tyre Corporation



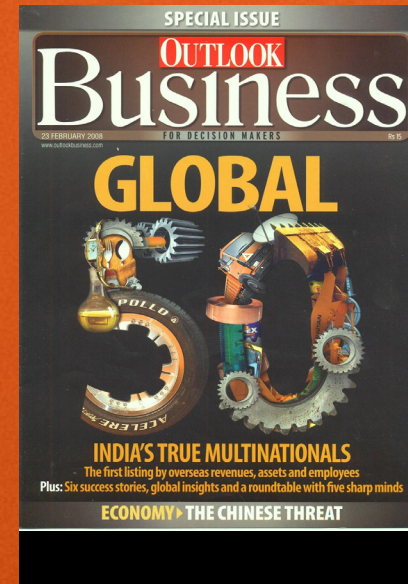
One of the world's **fastest growing**  
tyre companies



# India's leading tyre brand!



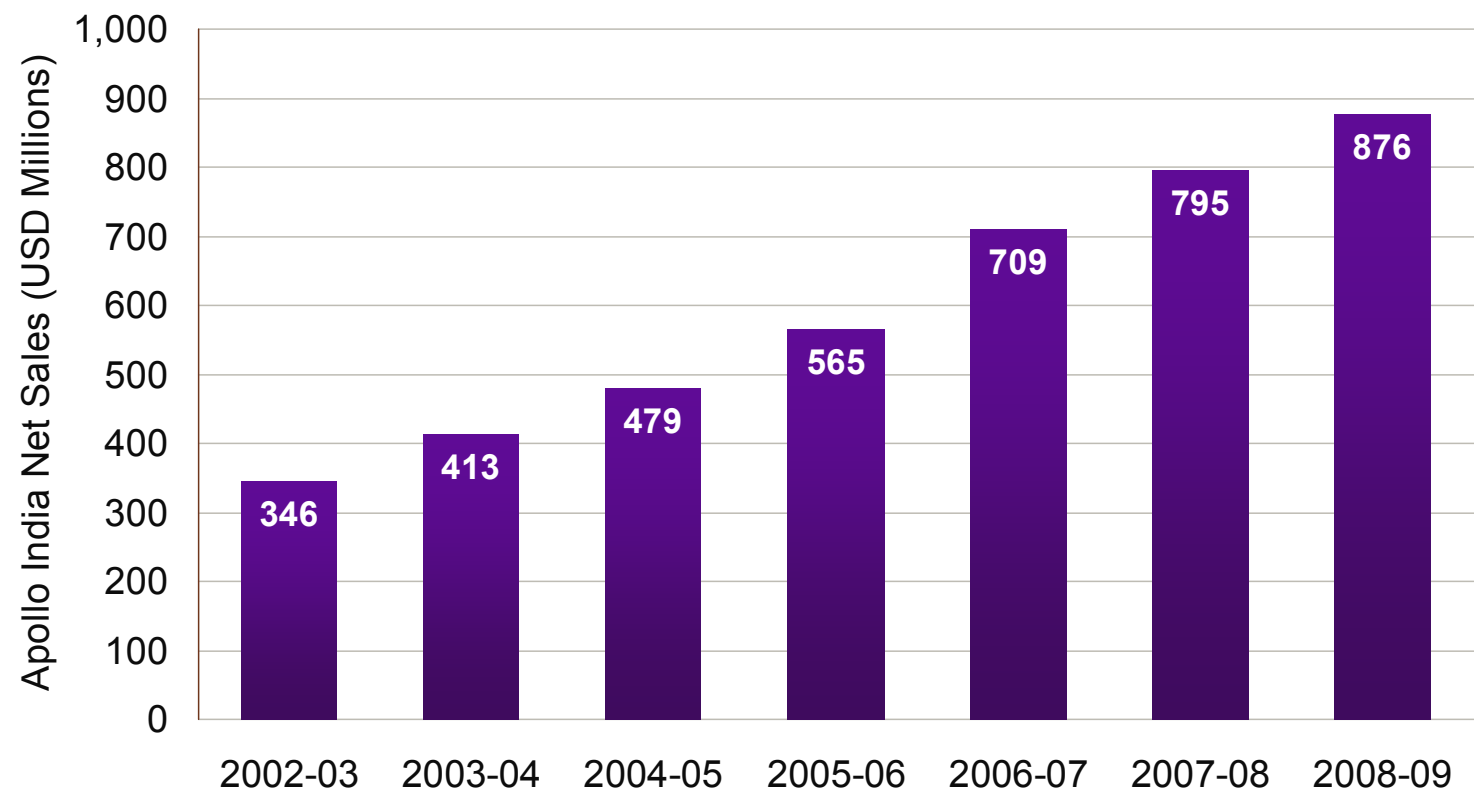
Three decades of manufacturing expertise and marketing innovation



Among the **Top 50** MNCs in India.

# Healthy topline growth in India

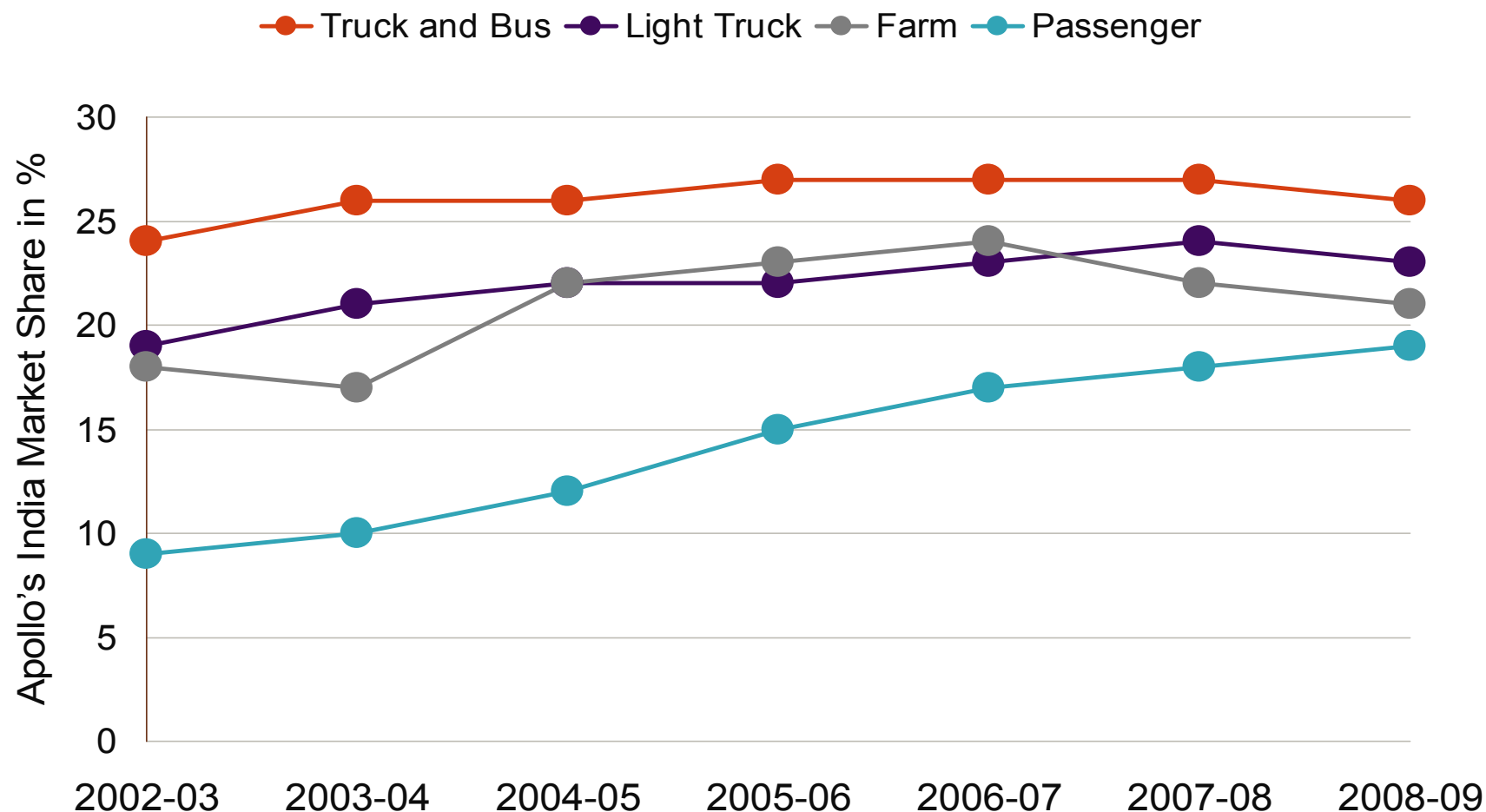
The fastest growing Indian tyre brand.



All data as on March 31, 2009



# Market Share across product categories in India



All data as on March 31, 2009

# Closest to the customer



**Largest team of trained manpower on product and service technology.**

---

**+130** Sales, Service and Stock Points

---

**5** Zonal offices

---

**19** State offices

---

**11** Redistribution centres

---

All data as on March 31, 2009



# Closest to the customer



Largest team of trained manpower on product and service technology.

---

**+4000**

Network Partners

---

**+2000**

Exclusive dealers

---

**+150**

“Apollo Radial World” outlets

---

**+60**

“Apollo Pragati Kendra”

---

All data as on March 31, 2009



# Growing with the vehicle makers



## Heavy & Light Commercial Vehicles

Tata Motors, Ashok Leyland, Eicher, Tatra Udyog, Force Motors, Swaraj Mazda, Mahindra, Asia Motors, Kamaz-Vectra



## Farm Vehicles

Mahindra, TAFE, New Holland, Punjab Tractors, International Tractors, John Deere



## Passenger Vehicles

Maruti Suzuki, Tata Motors, Mahindra, General Motors, Hyundai Motors, Skoda Auto, International Cars & Motors, Volkswagen

All data as on March 31, 2009

# The vehicle dynamics workshop

<b>Audience:</b>	The automobile industry
<b>Partners:</b>	ATP Papenburg and TUV SUD of Germany
<b>Objective:</b>	Create an industry-wide forum on the subject of vehicle dynamics. Held every 2 years. First workshop in Jan 2008.
<b>Participants:</b>	100 delegates from the automakers and India's leading automotive journalists





**2nd 'home' market**  
**South Africa**

**Apollo Tyres South Africa**



# The Dunlop history in South Africa

<b>1935:</b> First factory opened in Durban	<b>1973:</b> Second factory opened in Ladysmith	<b>2000:</b> Expansion and modernisation of TBR facility	<b>2004:</b> Expansion and modernisation of Ultra High Performance passenger car tyre facility
	<b>1992:</b> Launch of Truck & Bus Radial [TBR] tyres	<b>2002:</b> <b>World record for land speed</b> on standard production tyre @ 388.5 kmph – The “Spirit of Dunlop”	<b>2008:</b> Launch of Dunlop Zone.
	<b>1997:</b> Technical agreement with Sumitomo Rubber		



**The only brand of “Super Single” TBR and UHP in 17” and 18” sizes in South Africa**

# The “Dunlop” brand territories



## Africa

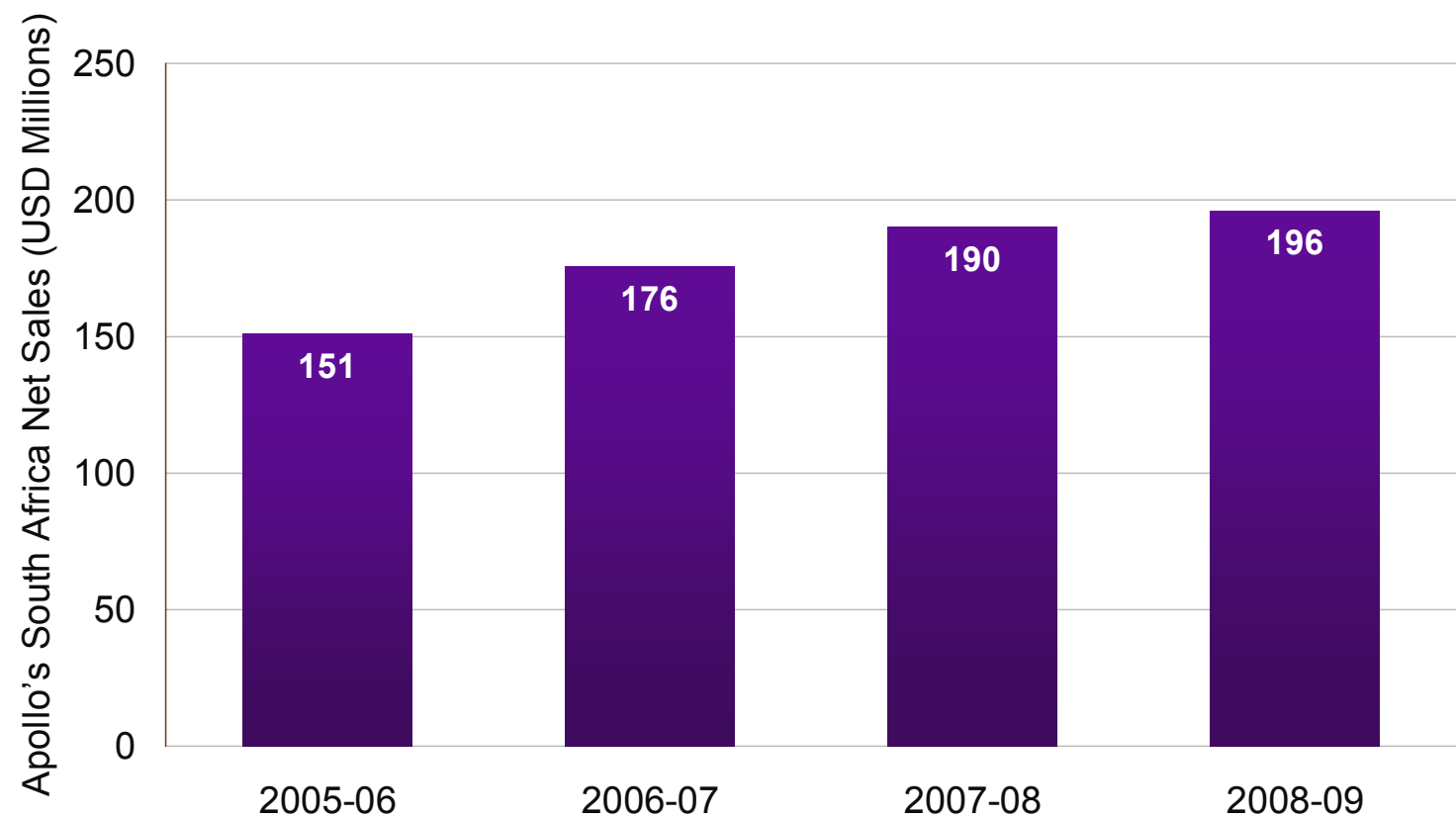
Angola	Lesotho	Somalia
Botswana	Liberia	South Africa
Burundi	Libya	Sudan
D.R.C	Malawi	Swaziland
Egypt	Mozambique	Tanzania
Equ. Guinea	Namibia	Uganda
Ethiopia	Nigeria	Zambia
Gambia	Rwanda	Zimbabwe
Ghana	Sao Tome	
Kenya	Sierra Leone	

## Indian Ocean

Mauritius  
Seychelles

# Healthy growth over the years

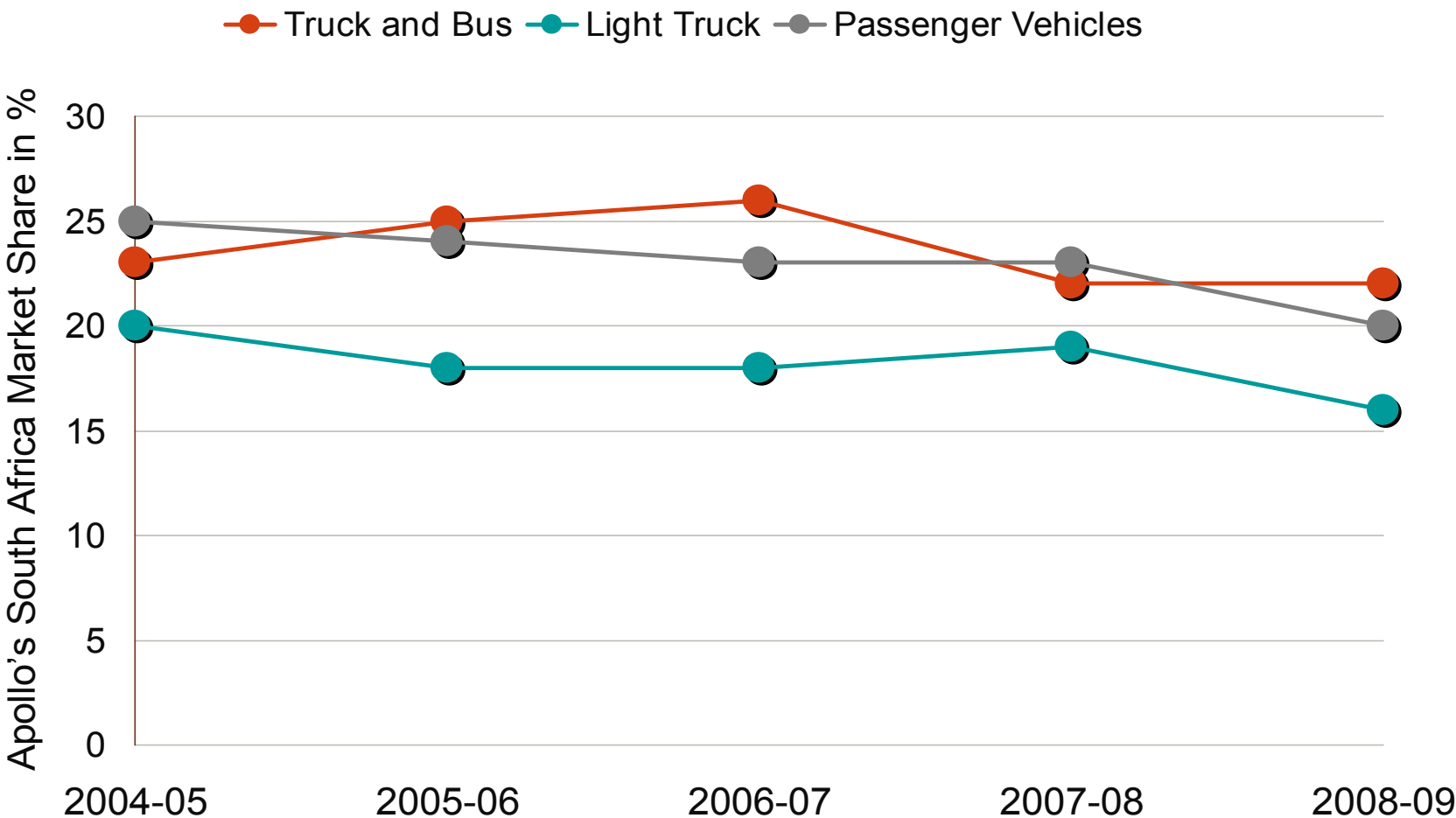
29% Growth since 2005



All data as on March 31, 2009



# Market Share across product categories



All data as on March 31, 2009

# Closest to the customer



All data as on March 31, 2009

Largest team of trained manpower on product and service technology.

---

**5** Sales, Service and Stock Points

---

**9** Regions

---

**2** Mother Warehouses

---

**970** Dealers

---

**185** Dunlop Zones

---





# 3rd 'home' market **Europe**

**Apollo Vredestein BV**



# The Vredestein brand



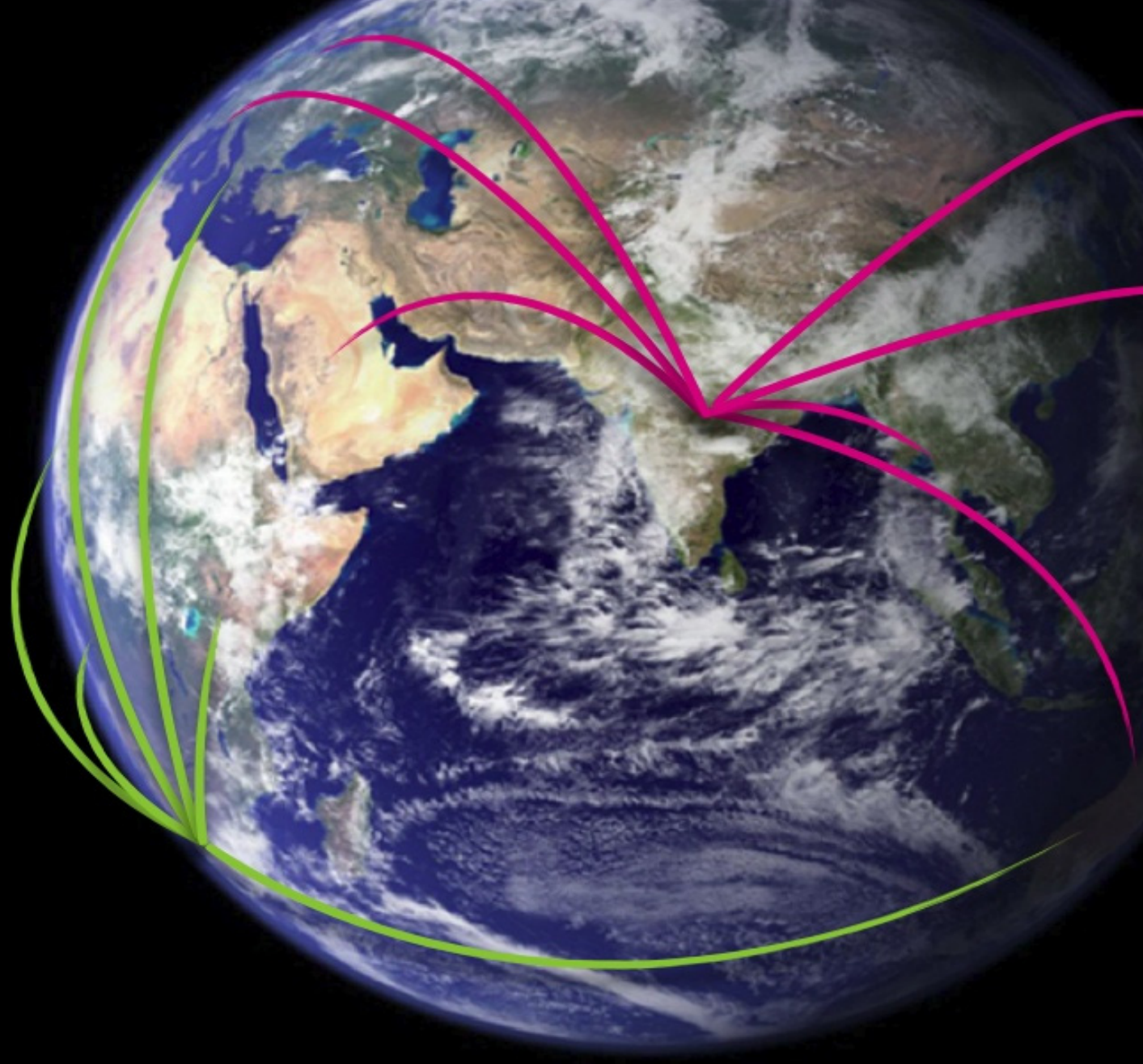
- Designer ultra high performance passenger vehicle tyre brand
- Very strong Farm & Bicycle tyre brand

# Vredestein Across the World





# The rest of the **World**







**50+**  
Countries

**2000+**  
Retail Points

All data as on March 31, 2009

[www.apollotyres.com](http://www.apollotyres.com)

**apollo**

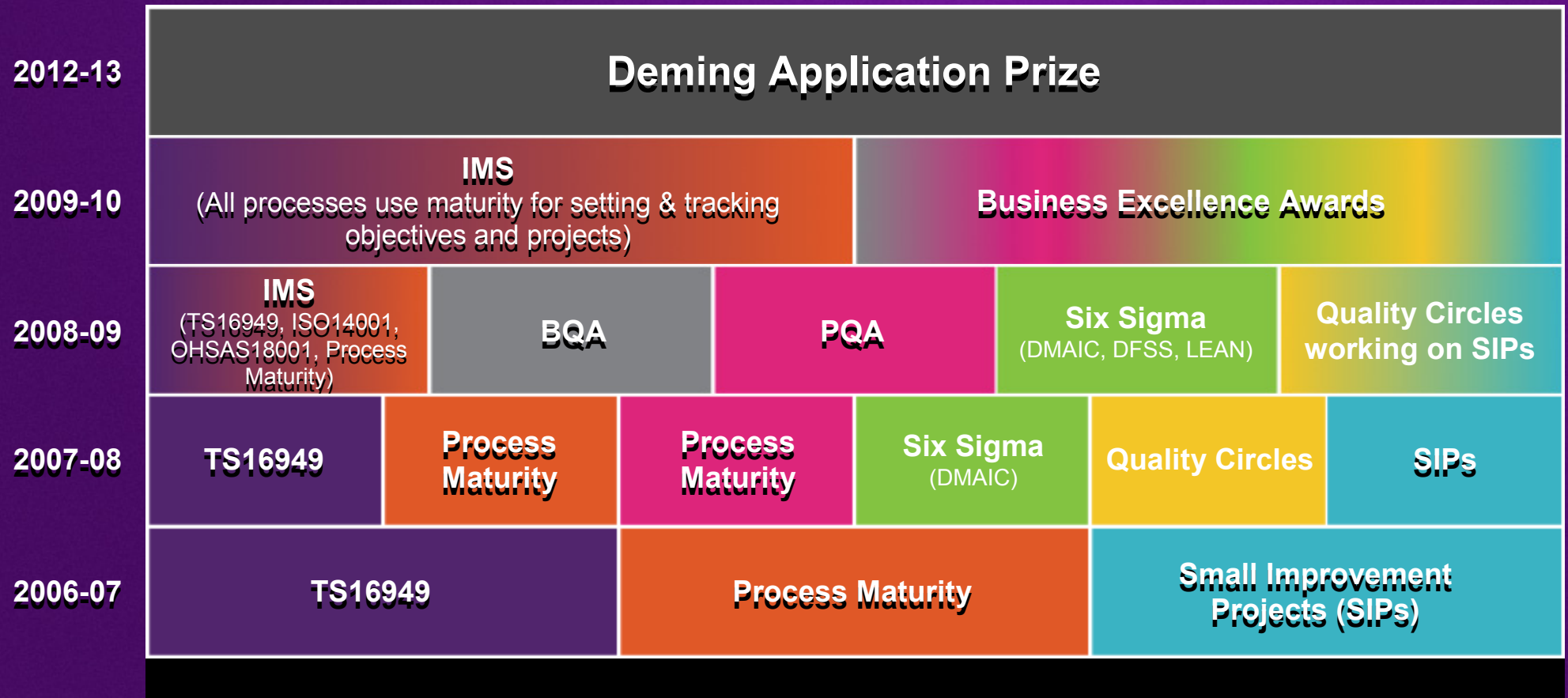


# Research, Design, and Development





# Our research and technology mission



# Product testing capabilities

## Outdoor Testing

- Ride Characteristics
- Handling Characteristics – Dry and Wet
- Subjective and Objective Noise
- Accelerated Tyre Endurance
- Wet and Dry Braking







## “Concept Tyres”

If the world can have concept cars,  
why not concept tyres?



Tom Tjaarda and the “Apollo Aspire TT  
concept” ultra high performance  
passenger car tyre.





# “Designer Tyres”

Giugiaro Design  
and Vredestein

# Materials Research Facilities



# Material Research Capabilities

Nature of Analysis	Equipments
Chemical	Atomic absorption, Chromatography (Gas, liquid, thin layer), Spectrometry (FTIR, IR, UV) etc
Physical	Stress-strain, dynamic compression and extension, flex fatigue, heat generation, tear energy, temperature fatigue etc
Rheology	Rheometers, viscometers, plastimeters, etc
Aging and weathering	Climatic Chamber (-30 to 250 deg C), Aging ovens, etc



# Material Research Collaboration

**Process Aids** – Flexsys, Netherlands



**Silica** – Degussa A.G, Germany



**Carbon Black** – Hi-Tech Carbon, India



**Steel wire** – Bekaert, Belgium



**Polyester & Rayon** – Performance  
Fibres, USA



# Quality Certifications





# Recognition from the experts

What impresses me most about the Apollo team is the sheer **dedication and passion** with which they work. Their focus is clear – design and produce the best tyres in the world.

Jan Focke ATP Papenburg, Germany  
[one of the world's most respected test facilities]  
November 2006

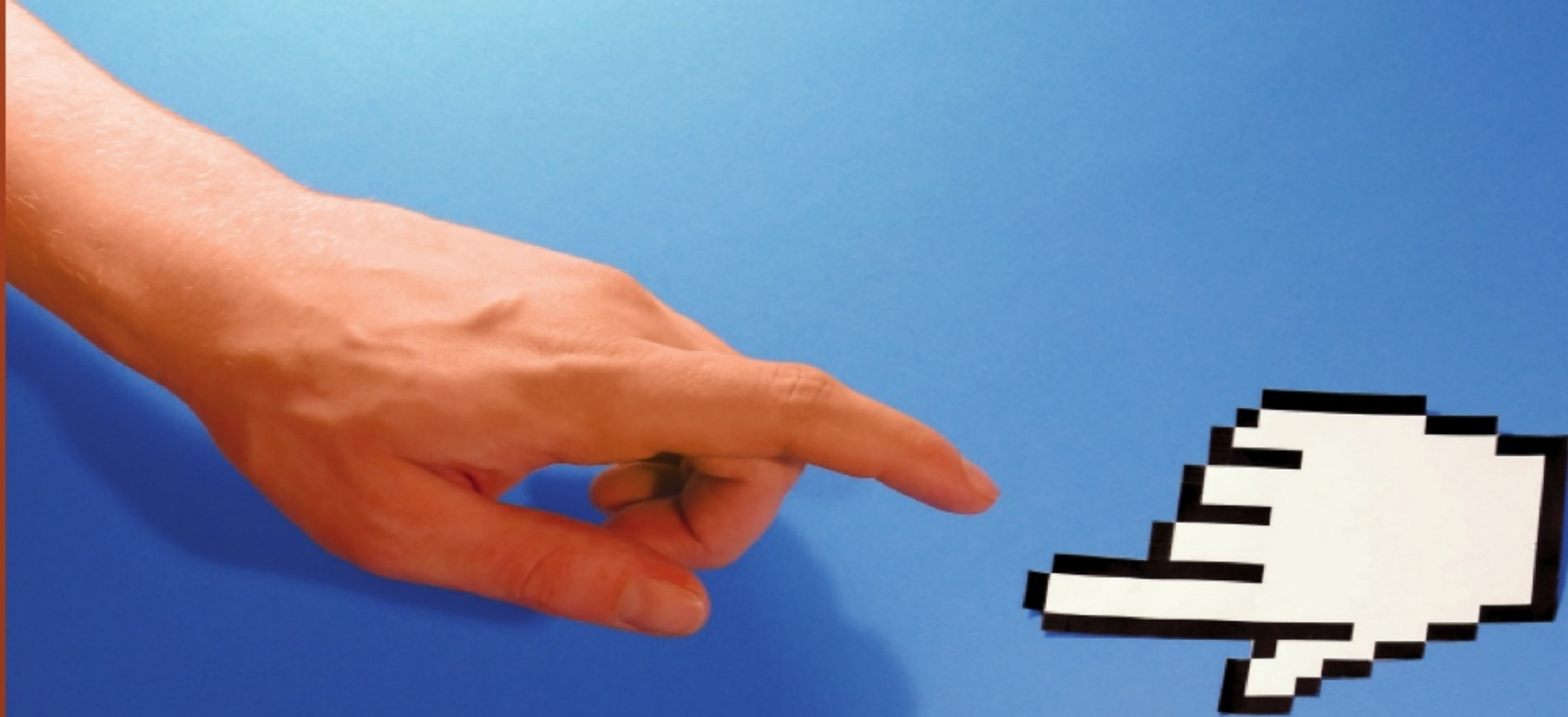


Having top of the line spec tyres helps too. GM has gone in for Apollo Aceleres as standard fitment on the Spark, and to say these help give the car the edge, **would be an understatement.**

Overdrive  
[leading Indian automobile magazine]  
May 2007 issue



*Karanbir Singh Bedi & Harinder Singh Sidhu created a **new India record** in June 2009[certified by the Limca Book of Records] of covering **3766 kms. in just 81 hours** from Koteswar [Gujarat] to Tezu [Arunachal Pradesh] in a Mahindra Xylo **on Apollo Hawkz tyres.***



**State of the art IT  
as an enabler of success.**



# APOLLO TYRES RUNS SAP



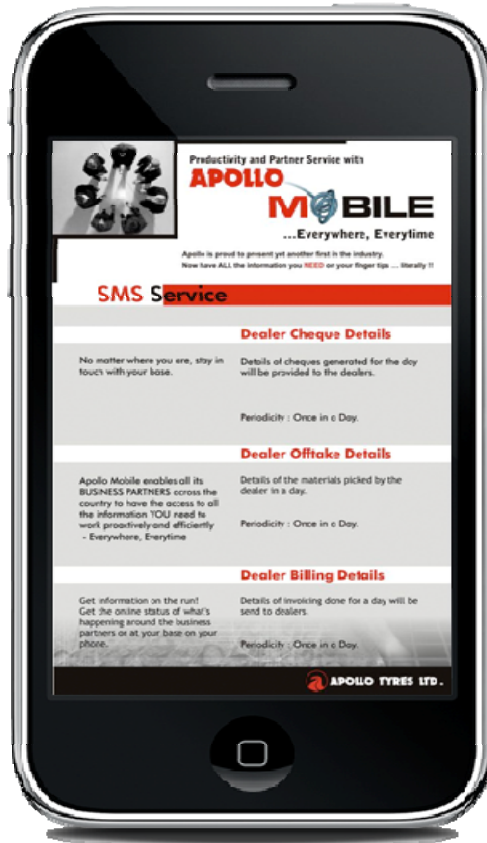
At SAP we have 32 years of experience developing flexible software solutions that can improve productivity and help you grow, no matter what your budget. That's why over 24,000 businesses large and small, in every industry, from banking to automotive to companies like Apollo Tyres, choose solutions from SAP. Find out how SAP can help your business run better at SAP.com, call toll free at 1800 425 5959 or write to us at [info.india@sap.com](mailto:info.india@sap.com)

THE BEST-RUN BUSINESSES RUN SAP™



We're the first Indian tyre company to implement SAP solutions.

# Our unique IT capabilities



## Apollo Mobile

Daily SMS updates

Unique in the tyre industry

Helps our dealer network and field personnel

## Dealer Portal

## Apollo Connect



# From Tyre to Tyre+



## Apollo DuraTreads

India's best pre-cured tread rubber



## Acelere Wheelz

Premium alloy wheels

First from a tyre company in India



## Apollo DuraTyre

India's first branded re-treaded tyre

Dedicated re-treading plant

Launched in May 2007

# We have what it takes.



**Design**

**Develop**

**Manufacture**

**Market**

**Service**



# The Sun Never Sets!