



February 06, 2025

To,
Listing/ Compliance Department
BSE LTD.
Phiroze Jeejeebhoy Towers,
Dalal Street,
Mumbai - 400 001

SCRIP CODE: 543748

To,
Listing/ Compliance Department
**National Stock Exchange of
India Limited**
"Exchange Plaza", Plot No. C/1,
G Block, Bandra Kurla Complex,
Bandra (E), Mumbai – 400 051
SYMBOL: AARTIPHARM

Dear Sir/Madam,

Sub: Results Presentation
Ref: Regulation 30 of the SEBI (LODR)
Regulations 2015

Please find enclosed herewith the Q3 FY25 Results Presentation of the Company for your records.

The same is also being uploaded on Company's website <https://www.aartipharmalabs.com/presentation>

Please take the same on your records.

Thanking you,

Yours faithfully,
For AARTI PHARMALABS LIMITED

JEEVAN MONDKAR
COMPANY SECRETARY AND LEGAL HEAD
ICSI M. NO. A22565

Encl. a/a.

AARTI PHARMALABS LIMITED

www.aartipharmalabs.com | CIN : L24100GJ2019PLC110964 | Email : info@aartipharmalabs.com


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Regd. Office : Plot No. 22-C/1 & 22-C/2, 1st Phase, G.I.D.C., Vapi 396 195, District - Valsad, Gujarat, INDIA, T : +91 260 2400467, +91 99099 94655



INVESTOR PRESENTATION

February 2025

SNAPSHOT



200+ Products
58 Patents Filed



500+ Global Clients
50+ Export Countries



3 State-of-the-art R&D facilities



6 Manufacturing Units
3 USFDA Units



2100+ Employees



47 US DMF
25 CEP



15-20% Global Market Share in Xanthine



0.18x Net Debt/Equity



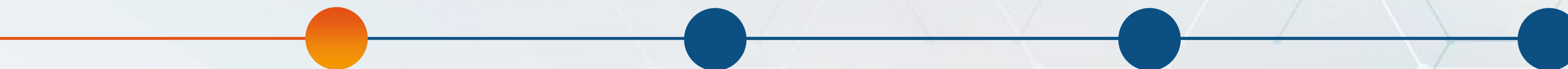
A+ Credit rating

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COMPANY OVERVIEW

- Aarti Pharmalabs Limited (APL) formerly known as Aarti Organics was established in 1984 as a wholly owned subsidiary of renowned Aarti Industries Limited. Got demerged in October 2022 into a separately listed entity (effective July 2021)
- Part of the Aarti group – a diversified chemical conglomerate with turnover of INR 134 bn (FY23)
- Established, internationally recognized manufacturer of generic Active Pharmaceutical Ingredients (API), Xanthine derivatives and offers CDMO/CMO services.
- Received accreditation from several agencies, including USFDA, EU GMP, EDQM (European Pharmacopoeia), KFDA (Korea), and COFEPRIS (Mexico).
- Over the years, demonstrated strong expertise in development of robust & cost-effective process for rapid scale up and commercial production.
- Focused on backward integration of intermediates for a majority of the API's that it manufactures.
- Strategically located: In western India with proximity to ports
- Preferred partner for beverages, nutraceuticals, and pharmaceutical industries globally.

HIGHLIGHTS



One of the leading small molecule CDMO/CMO company in India.

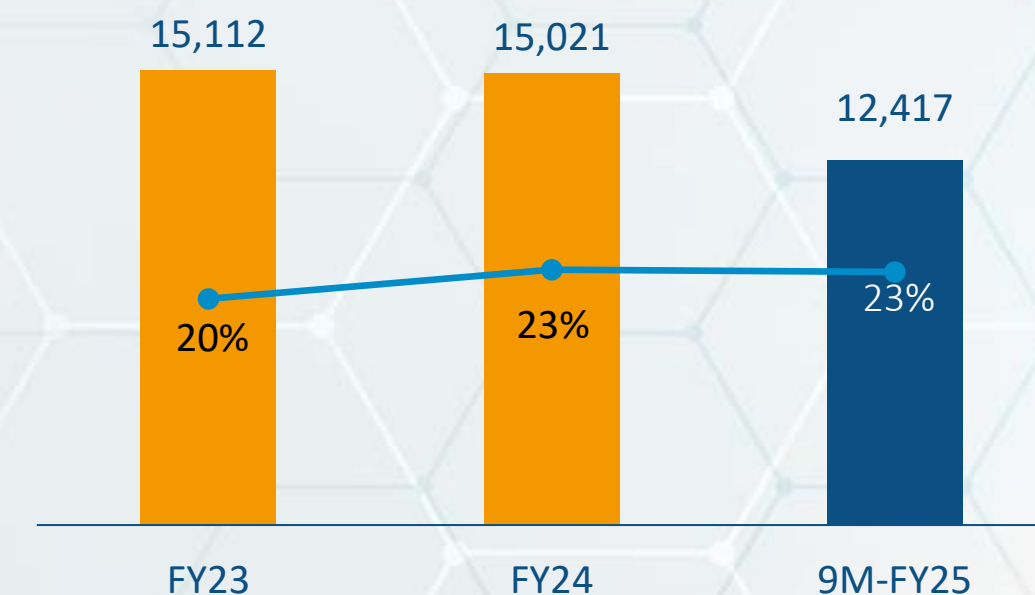


Regulatory focussed operations with expertise in novel chemistries;

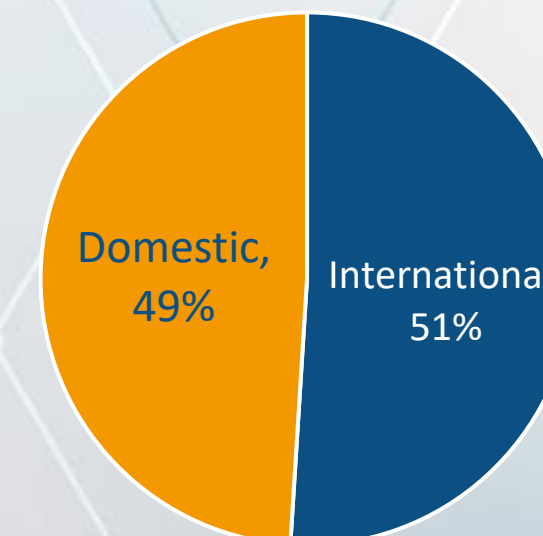


Largest manufacturer of Xanthine Derivatives in India

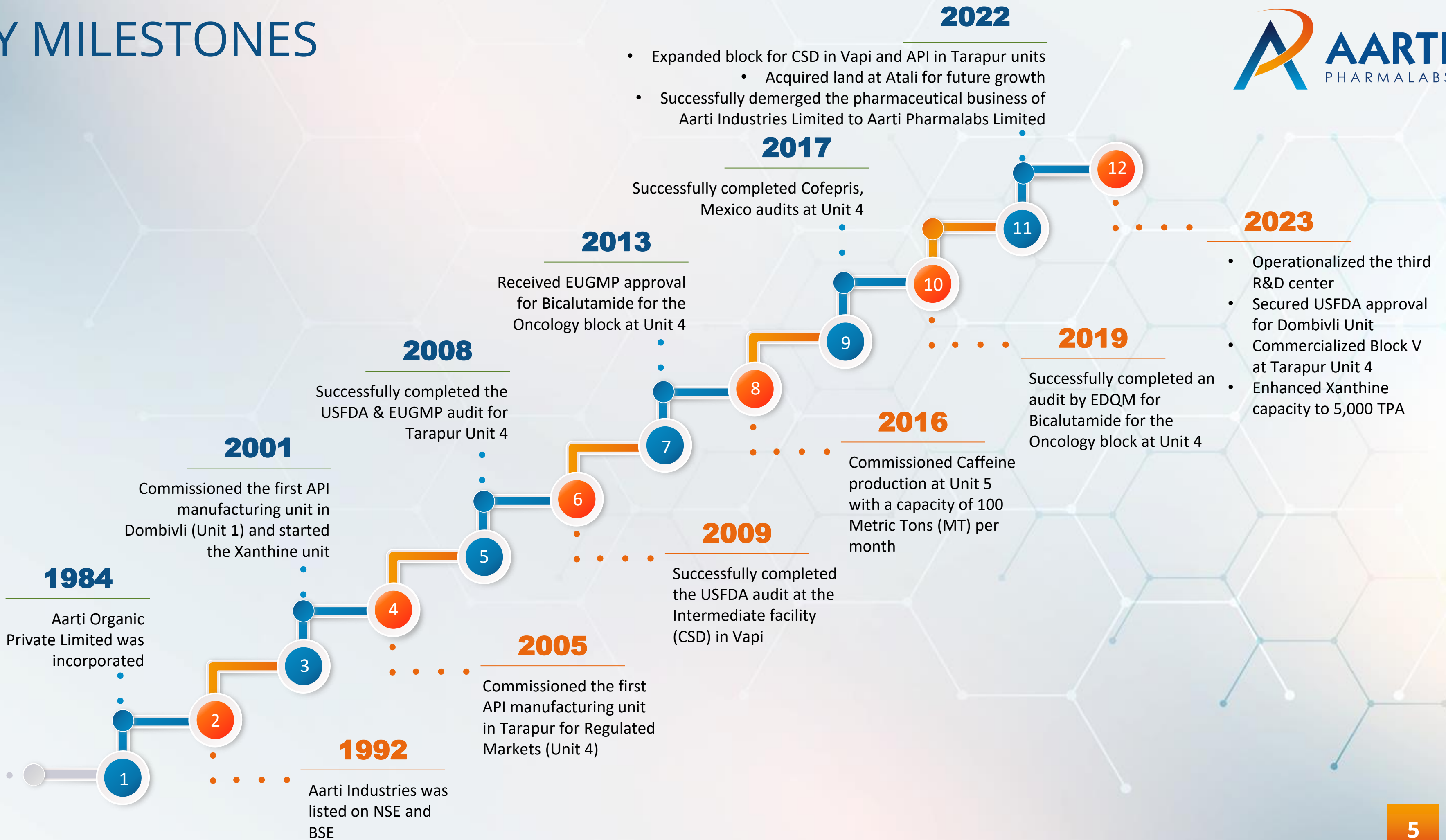
STANDLAONE REVENUE (INR Mn) & EBITDA MARGINS (%)



GEOGRAPHICAL SALES (Q3-FY25)



KEY MILESTONES



BOARD OF DIRECTORS



Shri Rashesh C. Gogri
Chairman

Shri Rashesh Gogri was appointed as the Chairman of the company in 2022. A production engineer from Mumbai University, he has played a key role in the growth of various strategic business units in the chemical, pharma, and personal care segments.



Smt. Hetal Gogri Gala
Vice Chairperson & MD

Graduate in electronics engineering from Mumbai University, Smt. Hetal Gogri Gala is the Vice Chairperson & Managing Director of the company since 2022. She has completed MEP from IIM-Ahmedabad. With rich experience in procurement & marketing functions, she oversees the commercial domain at the company



Shri Narendra Salvi
Managing Director

Shri Narendra Salvi is vastly experienced in the chemicals and pharma industry with an experience spanning over three decades. He is presently helping the quality system and projects and operations of the company.



Shri Rajendra V. Gogri
Non-Executive Director

Shri Rajendra V. Gogri has been associated with the company since its inception. A rank holder from UDCT, Mumbai, he possesses a master's degree in chemical engineering from the USA. He possesses a keen understanding of the financial and commercial aspects of the business



Shri Parimal H. Desai
Non-Executive Director

A chemical engineer from UDCT, Mumbai, Shri Parimal H. Desai has more than 34 years of experience in development and project implementation in the chemical and pharma industry.



Smt Nehal Garewal
Non-Executive Director

With 30+ years of work experience, Smt Nehal Garewal has worked in Pharma, Social & Education sector, security safety and risk management industries - gaining extensive knowledge of commercial strategy, planning, execution and innovation.



Prof. Vilas Gaikar
Independent Director

Prof. Vilas Gaikar holds a Ph.D. degree in Chemical Engineering from Institute of Chemical Technology (ICT). He is a recipient of numerous awards and has published more than 190 publications in referred International Journals.



Shri Bhavesh Vora
Independent Director

Shri Bhavesh Vora is a practicing Chartered Accountant, with more than 24 years of experience in the field of stock brokers' audits, compliances, derivatives, futures and options, accounting standards and internal management audit.



Shri Vinay Nayak
Independent Director

A pharmaceutical professional, Shri Vinay Nayak has worked with organizations such as Cipla, Lupin, Watson, Marksans, Alembic and Emcure pharmaceuticals for 32+ years. He specializes in the areas of manufacturing, quality, R&D, compliance and regulatory affairs, for API & formulation manufacturing.



Smt. Jeenal Savla
Independent Director

Smt. Jeenal Savla is a Chartered Accountant by qualification and has 14 plus years of experience in the areas of Internal Audit and Risk Management.



Smt. Rupal Vora
Independent Director

Smt. Rupal Vora is a Commerce and Law graduate from Government College, Mumbai University. She is a practicing advocate with 30+ years of experience and having specialization in direct taxation



Shri Pradeep Thakur
Independent Director

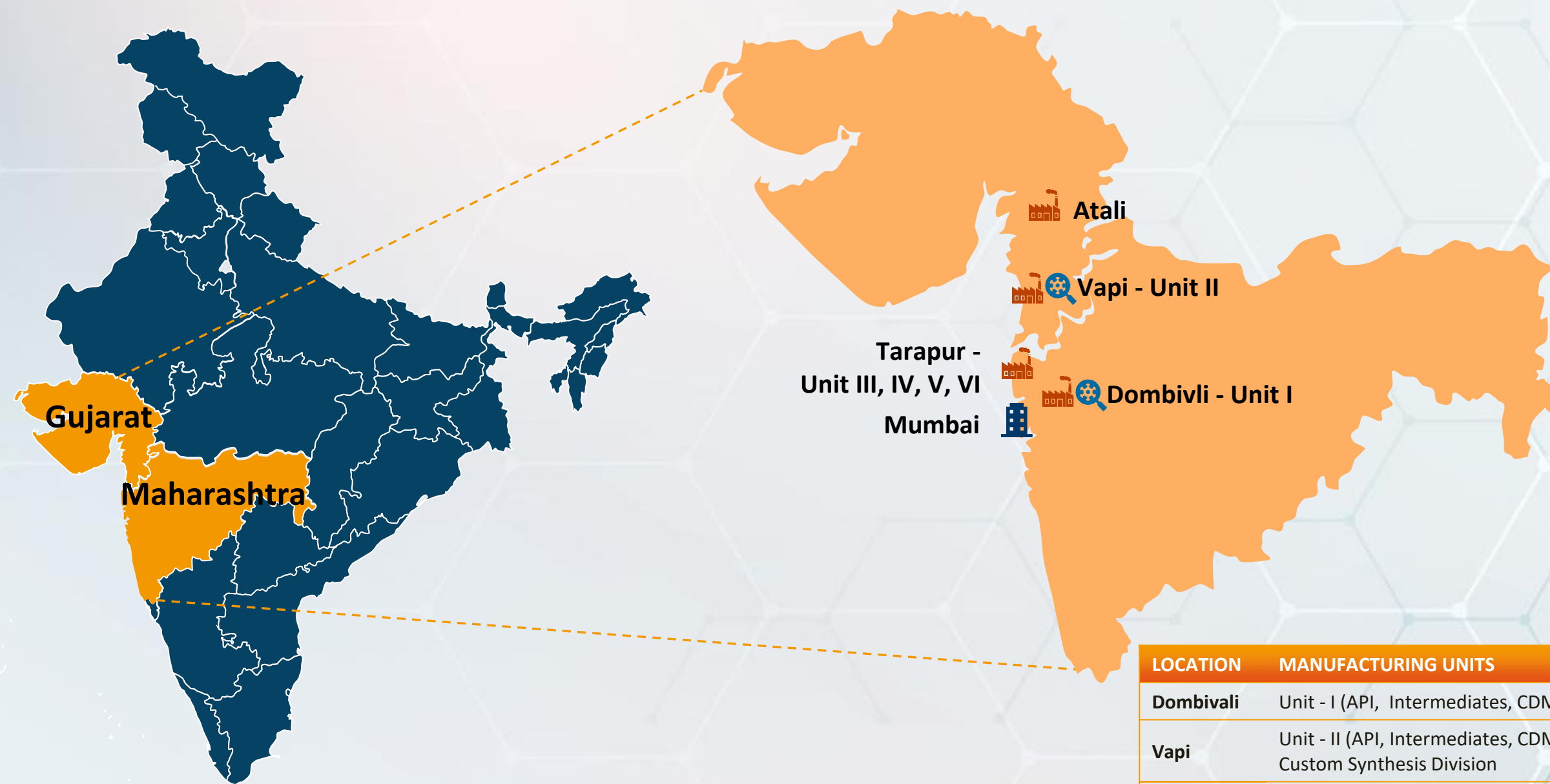
Shri Pradeep Thakur is a post-graduate in chemistry from Mumbai University. In 30+ years of experience with firms like Cipla, Dr Reddy, Bayer India, Aceto Pharma, he has extensively worked in areas of process development, quality control, business development etc

GEOGRAPHICAL PRESENCE



 Countries Exporting To

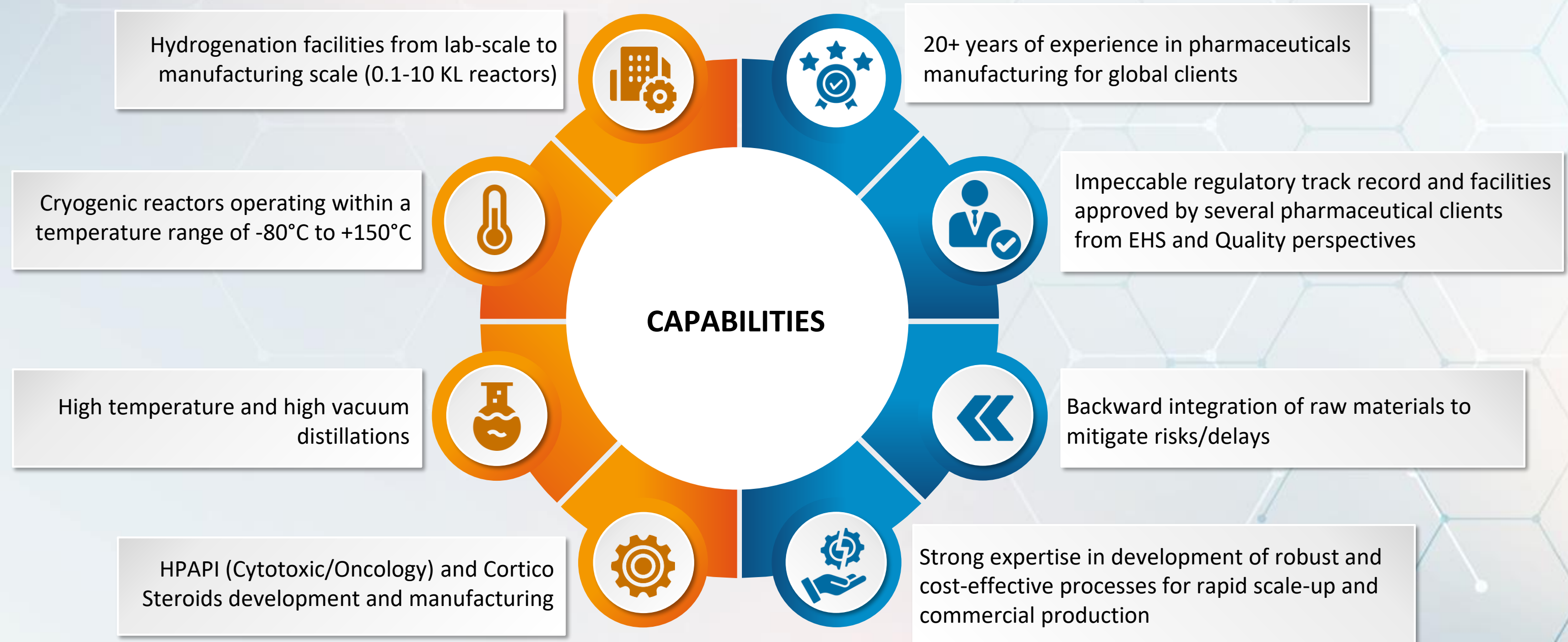
MANUFACTURING PRESENCE



LOCATION	MANUFACTURING UNITS	CERTIFICATIONS & AUDIT DATE
Dombivli	Unit - I (API, Intermediates, CDMO)	USFDA - Jun 2022
Vapi	Unit - II (API, Intermediates, CDMO) Custom Synthesis Division	USFDA - Sep 2009, Aug 2017
	Unit - III (Xanthine Unit)	
Tarapur	Unit - IV (API, CDMO-API)	USFDA - Mar 2008, Sep 2011, Mar 2015, Dec 2016, Feb 2020 EUGMP - Apr 2008, May 2012, Aug 2013, Jan 2015 EDQM - Sep 2019, KFDA - Nov 2017, COFEPRIS - Apr 2017, May 2017
	Unit - V (Xanthine Unit)	
	Unit - VI (Intermediate unit of Xanthine, speciality & allied products)	
Atali	New unit under construction ((CDMO, Intermediates)	

-  HEAD OFFICE
-  R&D CENTER
-  MANUFACTURING UNIT

END TO END CAPABILITIES UNDER ONE UMBRELLA



TECHNICAL CAPABILITIES

MANUFACTURING CAPABILITIES

RESEARCH & DEVELOPMENT

3

State of the art
R&D Centers at
Maharashtra & Gujarat

150+

Process for more than 150
intermediates developed
and manufactured on kilo-
lab scale

100+

New products to be
developed in next few
years

6%

R&D Spend (as a
percent of API &
CMDO sales) in FY 24

7

PhDs

70+

Scientists

43 Cr

R&D
Spend in FY24

50+

APIs commercialized

58

Process Patents Filed

28

Patents Granted



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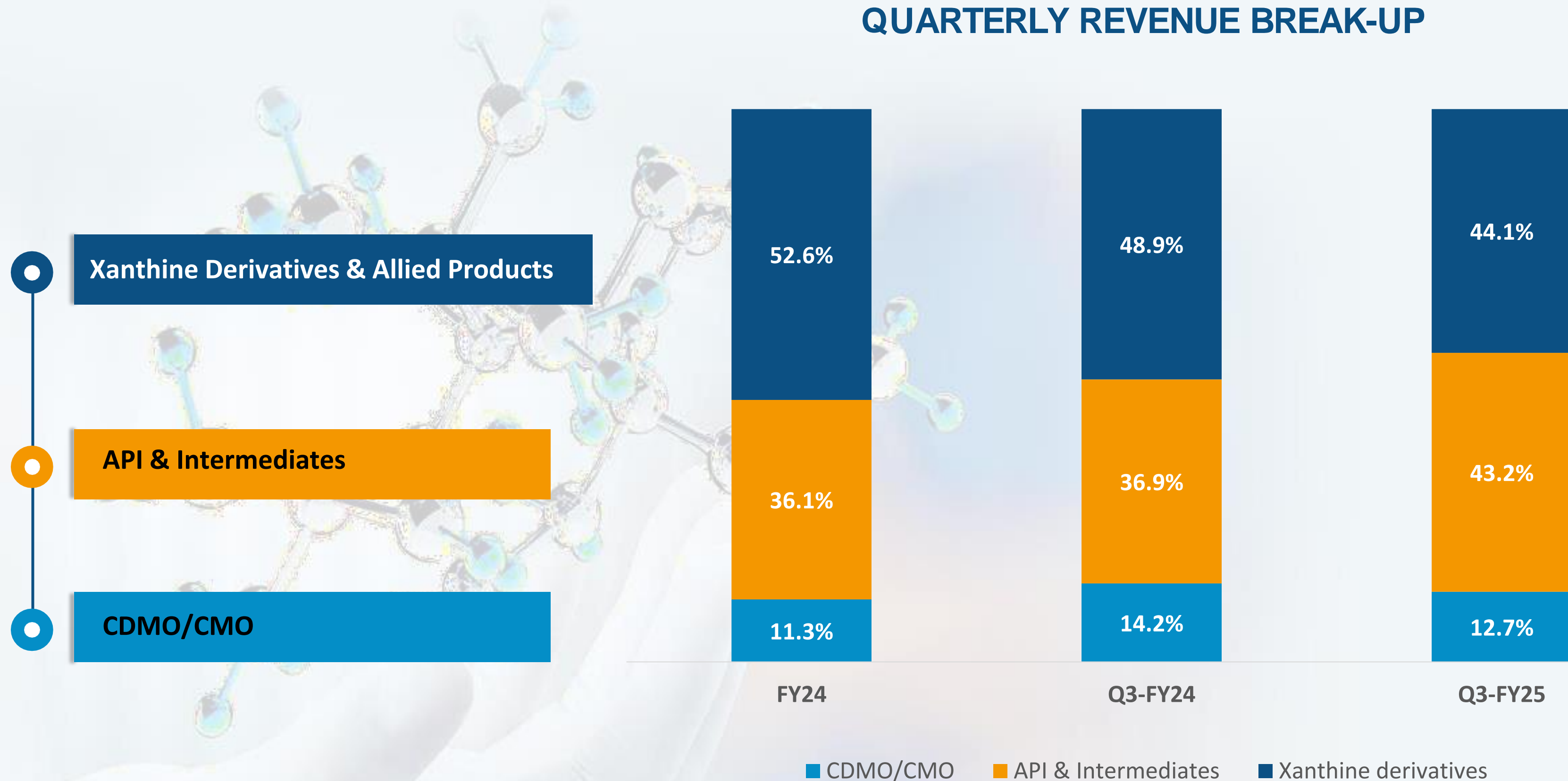
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KEY BUSINESS SEGMENTS

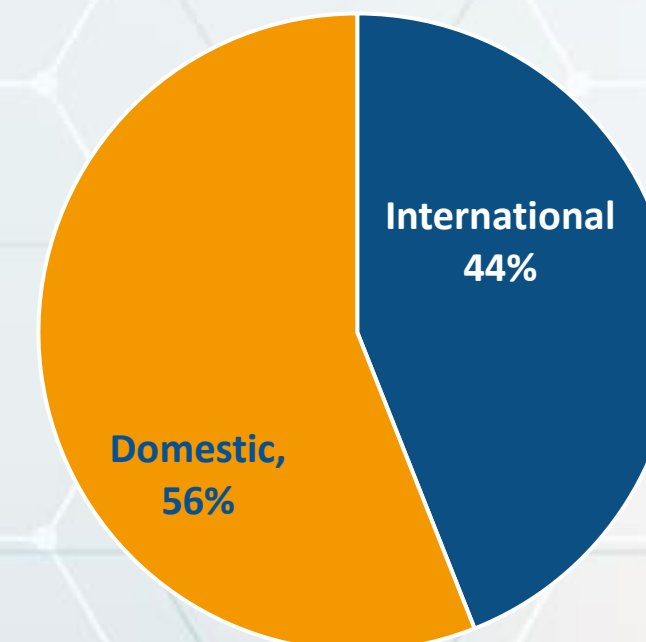
QUARTERLY REVENUE BREAK-UP



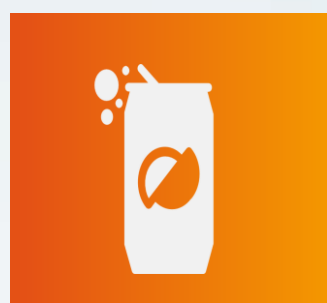
XANTHINE DERIVATIVES & ALLIED PRODUCTS

- Aarti Pharmalabs is the largest Indian manufacturer of Xanthine Derivatives, including Caffeine, Theophylline Anhydrous, Aminophylline, Etophylline, and Theophylline that find applications in beverages, nutraceuticals, and pharmaceutical industries.
- Largest manufacturing capacity in India for the flagship product 'caffeine'.
- Non-Chinese dependent and an integrated manufacturer of Xanthine derivatives, positioning them advantageously amidst trends like "China + 1" strategy.
- Xanthine derivatives are frequently used as mild stimulants and bronchodilators, particularly in managing symptoms associated with Asthma or Influenza.
- Operates two dedicated plants with a combined capacity of about 5,000 MTPA for producing Xanthine Derivatives.
- With a global market share of 15-20%, APL holds a significant presence in the global Xanthine industry.

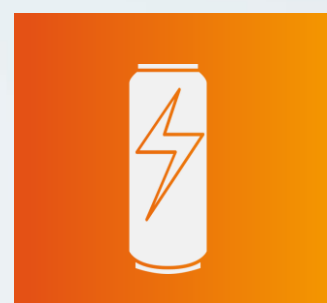
GEOGRAPHICAL SALES SPLIT (Q3-FY25)



END USE



Cola Drinks



Energy Drinks



Pharmaceutical



Nutraceutical

CERTIFICATIONS



API & INTERMEDIATES

- Aarti Pharmedlabs specializes in the development and manufacturing of Highly Potent Active Pharmaceutical Ingredients (HPAPIs), catering to the demand for critical drugs used in oncology, corticosteroids, and cytotoxic medicines.
- Backward integrated for most Active Pharmaceutical Ingredients (APIs), giving them control over the entire production value chain and ensuring high-quality intermediates.
- Operates USFDA approved manufacturing facilities, ensuring stringent compliance and quality standards.
- Enjoys a distinct advantage over competition in having dedicated US, EU, and Japan approvals in place.
- One of the preferred partners in regulated markets led by robust regulatory documentation and IPR support required for such markets.

KEY HIGHLIGHTS

54

APIs Commercialized by APL since it entered the pharma business in year 2000

12

New APIs are under development at API dedicated R&D facility/validation for pharmaceuticals

47

US DMF Approvals obtained across multiple therapeutic areas for APIs & intermediates

25

CEP Approvals available for sale in European Union across multiple therapeutic areas

140+

Generic Intermediates are available at R&D, Pilot And Commercial Scales

THERAPEUTIC SEGMENT



CARDIOVASCULAR



ANTI ASTHAMATIC



ANTI CANCER



ONCOLOGY



ANTI DIABETIC



CNS AGENT



SKIN CARE



OVERACTIVE BLADDER



CALCIMIMETIC



DECONGESTANT

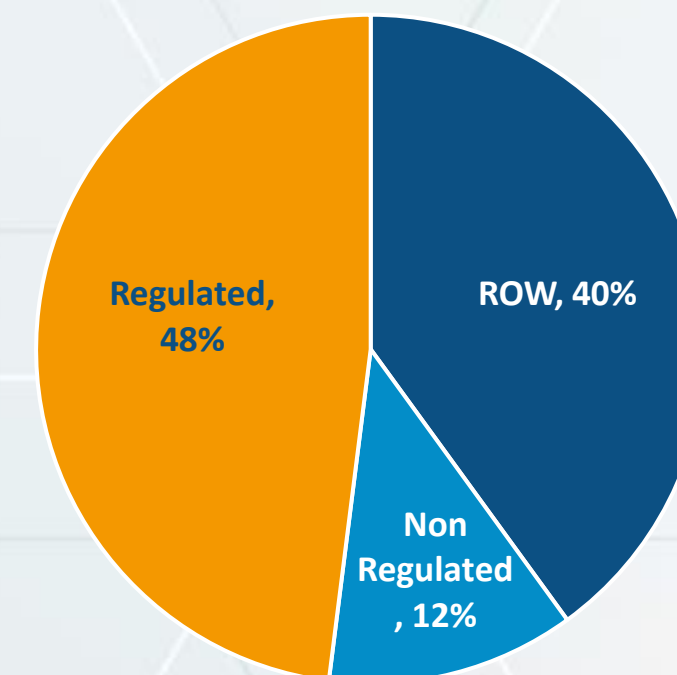


ANTI THALASSAEMIC

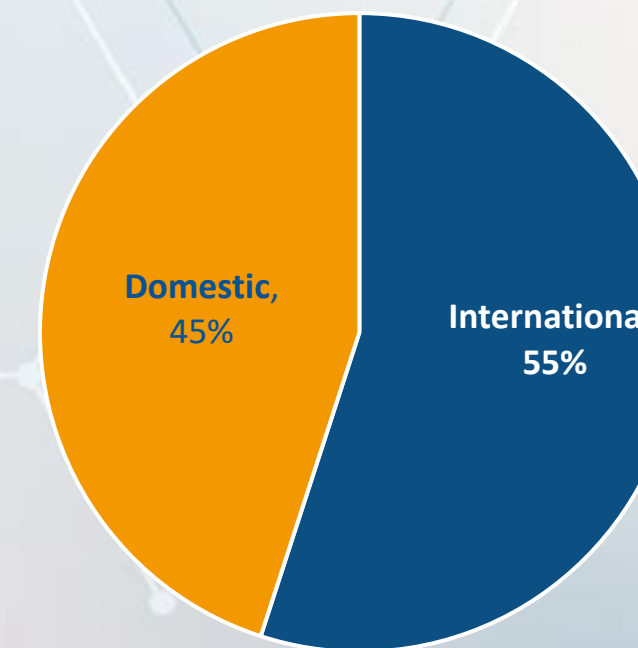


ANALGESIC

MARKET SEGMENTATION (Q3-FY25)



GEOGRAPHICAL SALES SPLIT (Q3-FY25)



CDMO & CMO

- Aarti Pharmalabs is one of the leading small molecule Contract Development and Manufacturing Organization (CDMO/CMO) in India.
- Offers services for drug substance projects including NCEs, APIs, RSMs, and Intermediates to global innovative pharmaceutical and biotech companies, Currently working with 16 innovator and big Pharma companies.
- Provides end-to-end services for small molecule NCEs drug development programs from lab scales to pilot and manufacturing scales focusing on clinical phases(Ph-I/II/III), launch, and commercial phase projects.
- CRAMS activity is primarily centered around the research and manufacturing services for active pharmaceutical ingredients (APIs) and intermediates with stringent intellectual property protection on the services offered.
- Dedicated R&D and pilot facilities focusing on CDMO. Presently working with 21 customers on 56 active projects, of which 28 are in the commercial stage and 28 are under different stages of development, both at customer's end.



SERVICES OFFERED



End-to-end solutions from synthetic route design to commercial manufacturing, specializing in HPAPIs, cryogenic reaction & hydrogenation



Comprehensive services like
1) Robust process development (DoE & QbD studies)
2) Process validation and
3) Analytical method development & validation



Drug substance manufacturing for Pre-Clinical, Clinical, Launch & Commercial manufacturing



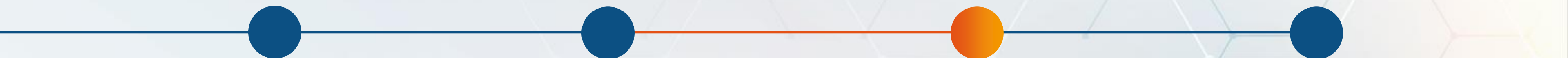
Strong CMC documentation expertise to ensure smooth regulatory approvals.

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GROWTH DRIVERS




FUTURE OUTLOOK



Fortify market leading position in the Xanthine segment by brownfield capacity expansion



Plan to strengthen API and CDMO segment by introducing more value-added products and acquiring new customers



Expect EBITDA growth of approximately 10-12% in FY25



Aim to achieve long-term goal of about 15% annual growth in the next 3 years



ENVIRONMENT

- ISO 14001 : 2015 certification
- All plants are Zero Liquid Discharge (ZLD)
- ~50% of total water consumed is recycled
- Green chemistry principles incorporated during product development stage
- Recycle & reuse of solvents and safe disposal of Hazardous waste
- Initiated GHG accounting following the GHG Protocol across all three scopes
- Installing a solar-based electricity generation plant, to further minimize our carbon footprint

- Hazard Identification and Risk Assessment (HIRA), Hazardous Area Classification (HAC) and work permit system in place
- Safety Trainings - Induction, On the job, Classroom, Demos
- Incident management - “Safety Alert”, Learning from Incidents, Root cause analysis and Global CAPA Implementation
- Industrial Hygiene study conducted
- Strengthened HR policies and procedures - considering UN Global Compact, International Labor Organization's (ILO) Declaration and Sexual Harassment of Women at Workplace Act, 2013 etc.

SOCIAL



GOVERNANCE

- Robust Compliance Monitoring Framework - implemented PWC’s GRC tool to track & regularly monitor various governance aspects
- Internal monitoring and control systems for anti - corruption, bribery and anti - competitive practices
- Core Business Process digitized on a robust SAP ERP backbone
- Environment, Health, Safety & Quality processes digitized on Intellex Cloud platform
- Plan to release sustainability report for FY24 to showcase our integration of ESG principles in business & decision making

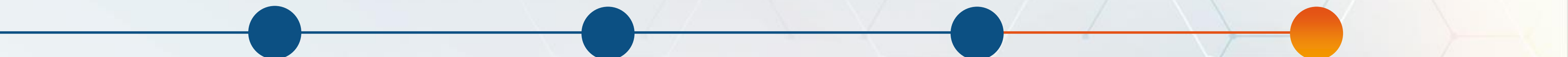


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QUARTERLY CONSOLIDATED INCOME STATEMENT



PARTICULARS (INR Mn)	Q3-FY25	Q2-FY25	Q-O-Q	Q3-FY24	Y-O-Y
Operational Revenue	5,378	4,580	17.4%	4,487	19.9%
Operating Expenses	4,092	3,643	12.3%	3,530	15.9%
EBITDA	1,286	937	37.2%	957	34.4%
EBITDA Margin (%)	23.91%	20.46%	345 Bps	21.33%	258 Bps
Depreciation and Amortisation	230	209	10.0%	188	22.3%
Finance costs	100	55	81.8%	45	NA
Other Income	50	45	11.1%	14	NA
PBT	1,006	718	40.1%	738	36.3%
Tax Expense	266	172	54.7%	210	26.7%
PAT	740	546	35.5%	528	40.2%
PAT Margin (%)	13.76%	11.92%	184 Bps	11.77%	199 Bps
Other Comprehensive Income	(27)	(27)	-	3	NA
Total Comprehensive Income	713	519	37.4%	531	34.3%
Diluted EPS	8.16	6.02	35.5%	5.82	40.2%

YTD CONSOLIDATED INCOME STATEMENT



PARTICULARS (INR Mn)	9M-FY25	9M-FY24	Y-O-Y
Operational Revenue	15,513	13,468	15.2%
Operating Expenses	12,325	10,784	14.3%
EBITDA	3,188	2,684	18.8%
EBITDA Margin (%)	20.55%	19.93%	62 Bps
Depreciation and Amortisation	641	541	18.5%
Finance costs	203	125	62.4%
Other Income	117	29	NA
PBT	2,461	2,047	20.2%
Tax Expense	620	531	16.8%
PAT	1,841	1,517	21.4%
PAT Margin (%)	11.87%	11.26%	61 Bps
Other Comprehensive Income	(50)	-	-
Total Comprehensive Income	1,791	1,517	18.1%
Diluted EPS	20.30	16.73	21.3%

HISTORICAL CONSOLIDATED INCOME STATEMENT



PARTICULARS (INR Mn)	FY23	FY24	9M-FY25
Operational Revenue	19,452	18,526	15,513
Total Expenses	16,031	14,666	12,325
EBITDA	3,421	3,860	3,188
EBITDA Margins (%)	17.59%	20.84%	20.55%
Depreciation and Amortisation	625	732	641
Finance costs	211	172	203
Other Income	23	49	117
PBT	2,608	3,005	2,461
Tax	673	836	620
PAT	1,935	2,169	1,841
PAT Margins (%)	9.95%	11.71%	11.87%
Other Comprehensive Income	(35)	(4)	(50)
Total Comprehensive Income	1,900	2,165	1,791
Diluted EPS (INR)	21.35	23.93	20.30

QUARTERLY STANDALONE INCOME STATEMENT



PARTICULARS (INR Mn)	Q3-FY25	Q2-FY25	Q-O-Q	Q3-FY24	Y-O-Y
Operational Revenue	4,709	3,773	24.8%	3,730	26.2%
Operating Expenses	3,559	2,925	21.7%	2,848	25.0%
EBITDA	1,150	848	35.6%	882	30.4%
EBITDA Margin (%)	24.42%	22.48%	194 Bps	23.65%	77 Bps
Depreciation and Amortisation	210	189	11.1%	169	24.3%
Finance costs	97	54	79.6%	44	NA
Other Income	119	29	NA	5	NA
PBT	962	634	51.7%	674	42.7%
Tax Expense	227	156	45.5%	192	18.2%
PAT	735	478	53.8%	482	52.5%
PAT Margin (%)	15.61%	12.67%	294 Bps	12.92%	269 Bps
Other Comprehensive Income	(19)	(11)	72.7%	7	NA
Total Comprehensive Income	716	467	53.3%	489	46.4%
Diluted EPS	8.11	5.27	53.9%	5.32	52.4%

YTD STANDALONE INCOME STATEMENT

PARTICULARS (INR Mn)	9M-FY25	9M-FY24	Y-O-Y
Operational Revenue	12,417	10,873	14.2%
Operating Expenses	9,584	8,485	13.0%
EBITDA	2,833	2,388	18.6%
EBITDA Margin (%)	22.82%	21.96%	86 Bps
Depreciation and Amortisation	582	487	19.5%
Finance costs	193	122	58.2%
Other Income	170	53	NA
PBT	2,228	1,832	21.6%
Tax Expense	543	456	19.1%
PAT	1,685	1,376	22.5%
PAT Margin (%)	13.57%	12.66%	91 Bps
Other Comprehensive Income	(33)	13	NA
Total Comprehensive Income	1,652	1,389	18.9%
Diluted EPS	18.58	15.19	22.3%

HISTORICAL STANDALONE INCOME STATEMENT

PARTICULARS (INR Mn)	FY23	FY24	9M-FY25
Operational Revenue	15,112	15,021	12,417
Total Expenses	12,028	11,560	9,584
EBITDA	3,084	3,461	2,833
<i>EBITDA Margins (%)</i>	20.41%	23.04%	22.82%
Depreciation and Amortisation	558	660	582
Finance costs	205	166	193
Other Income	13	110	170
PBT	2,334	2,745	2,228
Tax	617	738	543
PAT	1,717	2,007	1,685
<i>PAT Margins (%)</i>	11.36%	13.36%	13.57%
Other Comprehensive Income	(7)	1	(33)
Total Comprehensive Income	1,710	2,008	1,652
Diluted EPS (INR)	18.95	22.14	18.58

HISTORICAL CONSOLIDATED BALANCE SHEET



ASSETS (INR Mn)	FY23	FY24	H1-FY25
Non-current assets			
Property, plant and equipment	9,227	9,942	10,944
Capital work-in-progress	622	785	1,160
Right-to-use assets	11	205	179
Goodwill	18	18	18
Other Intangible assets	2	169	267
Intangible assets under development	397	584	633
Financial assets			
Investments (others)	355	368	358
Loans	59	59	72
Other Financial Assets	94	113	160
Other non-current assets	25	122	208
Total of Non-current assets	10,810	12,365	13,999
Current assets			
Inventories	6,020	6,429	7,198
Financial assets			
Investments	510	704	582
Trade receivables	4,501	5,193	4,334
Cash and cash equivalents	121	236	408
Bank balances other than above	1	4	5
Loans	13	13	12
Other financial assets	51	63	46
Other current assets	413	780	1,127
Current Tax Assets (Net)	-	34	57
Total Current assets	11,630	13,456	13,767
Total Assets	22,440	25,821	27,765

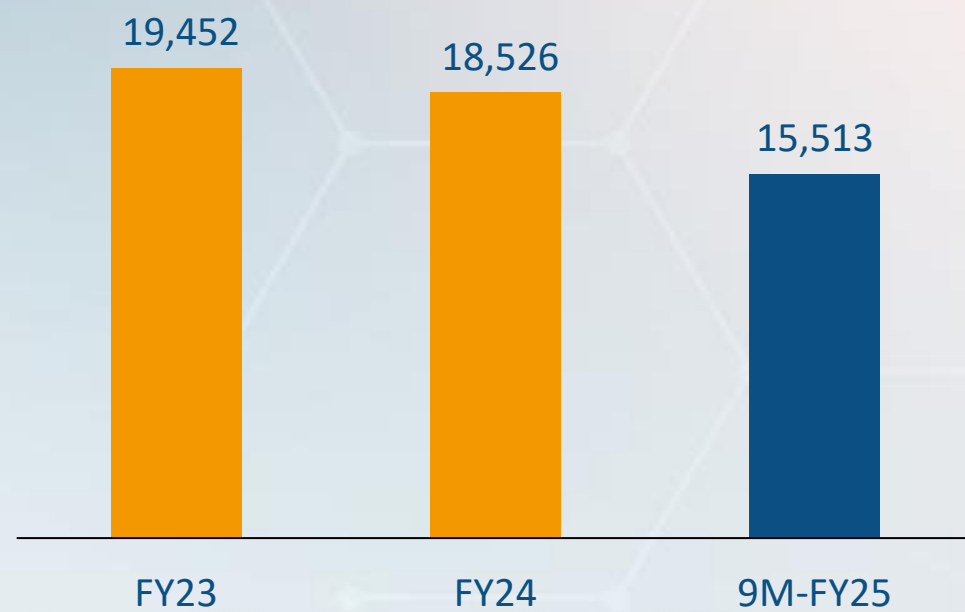
EQUITY & LIABILITIES (INR Mn)	FY23	FY24	H1-FY25
Equity share capital	453	453	453
Equity Share Capital Pending allotment	-		
Other equity	15,132	17,117	18,114
Total Equity	15,585	17,570	18,567
Liabilities			
Non-current liabilities			
Financial liabilities			
Borrowings	2	0	1,016
Lease liabilities	5	167	128
Provisions	54	61	71
Deferred Tax Liabilities (Net)	788	1,079	1,149
Total of Non-current liabilities	849	1,307	2,364
Current liabilities			
Financial liabilities			
Borrowings	2,142	2,641	2,659
Lease liabilities	4	45	62
Trade Payables	3,396	3,783	3,335
Other financial liabilities	247	302	429
Provisions	55	63	128
Current Tax Liabilities (Net)	35	-	-
Other Current Liabilities	127	110	224
Total of Current liabilities	6,006	6,944	6,837
Total Liabilities	6,855	8,251	9,198
Total Equity & Liabilities	22,440	25,821	27,765

HISTORICAL STANDALONE BALANCE SHEET

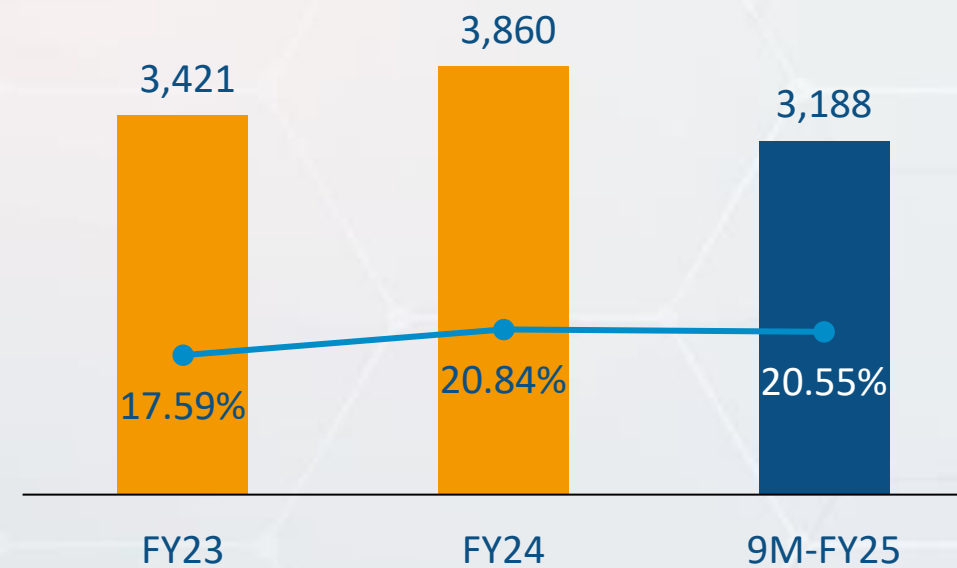
ASSETS (INR Mn)	FY23	FY24	H1-FY25	EQUITY & LIABILITIES (INR Mn)	FY23	FY24	H1-FY25
Assets				Equity & Liabilities			
Non-current assets				Equity share capital	453	453	453
Property, plant and equipment	8,471	9,160	10,167	Equity Share Capital Pending allotment	-	-	
Capital work-in-progress	622	785	1,160	Other equity	13,933	15,762	16,616
Right-to-use assets	11	205	179	Total equity attributable to equity holders	14,386	16,215	17,069
Other Intangible assets	2	169	266	Liabilities			
Intangible assets under development	397	584	633	Non-current liabilities			
Financial assets				Financial liabilities			
Investment in Subsidiary & Joint Control	135	135	135	Borrowings	0	0	1,015
Investments (others)	292	303	306	Lease liabilities	5	167	128
Loan	59	59	72	Provisions	47	53	56
Other Financial Assets	88	107	146	Deferred Tax Liabilities (Net)	688	979	1,054
Other non-current assets	25	122	207	Total of Non-current liabilities	740	1,199	2,253
Total of Non-current assets	10,102	11,629	13,271	Current liabilities			
Current assets				Financial liabilities			
Inventories	5,377	5,822	6,342	Borrowings	2,067	2,508	2,659
Financial assets				Lease liabilities	4	45	62
Trade receivables	3,717	4,488	3,873	Trade Payables	2,125	2,548	2,261
Cash and cash equivalents	131	218	394	Other financial liabilities	231	284	416
Bank balances other than above	1	4	5	Provisions	54	62	117
Loans	10	9	10	Current Tax Liabilities (Net)	29	-	-
Other financial assets	51	63	46	Other Current Liabilities	128	108	224
Other current assets	375	706	1,053	Total of Current liabilities	4,638	5,555	5,739
Current Tax Assets (Net)	0	30	67	Total Liabilities	5,378	6,755	7,989
Total of Current assets	9,662	11,340	11,787	Total Equity & Liabilities	19,764	22,969	25,058
Total Assets	19,764	22,969	25,058				

CONSOLIDATED FINANCIAL HIGHLIGHTS

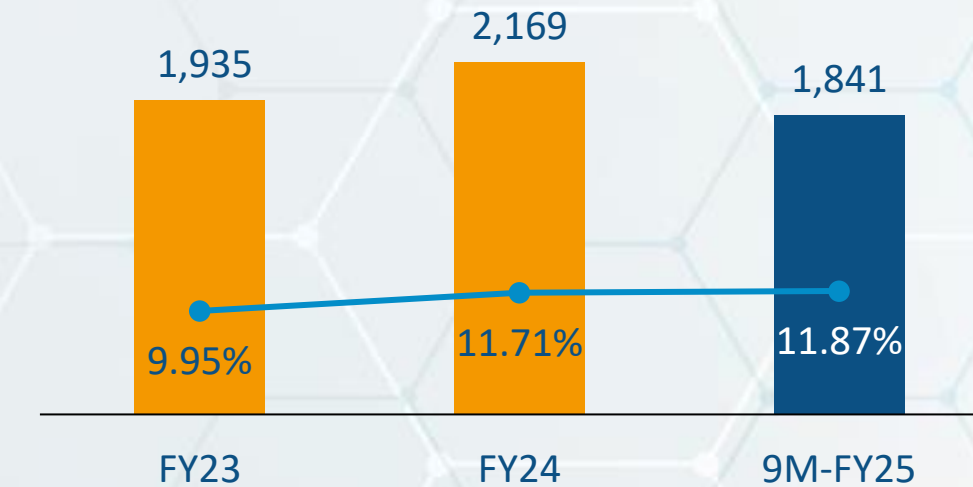
OPERATIONAL INCOME (INR Mn)



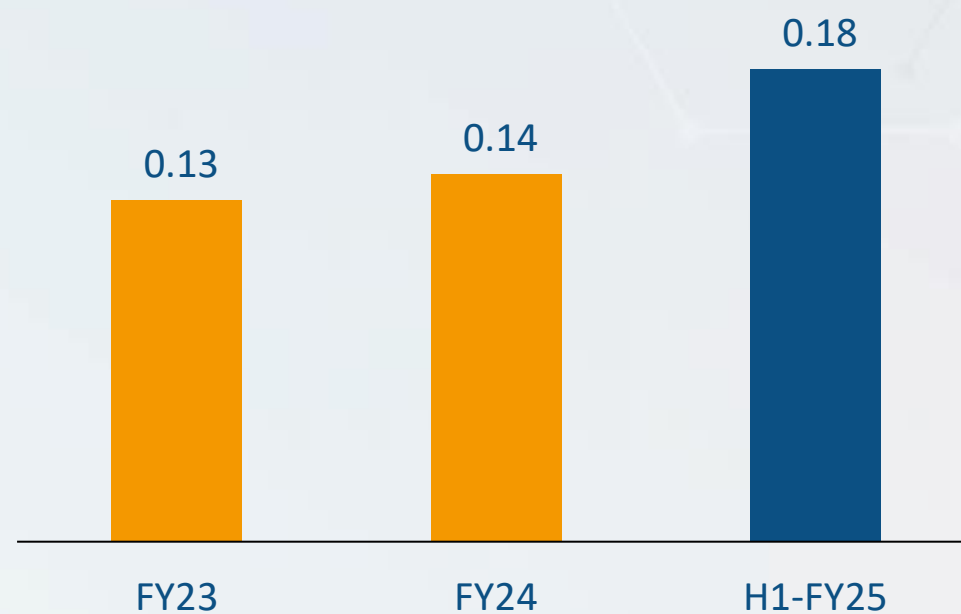
EBITDA (Mn) & EBITDA MARGINS (%)



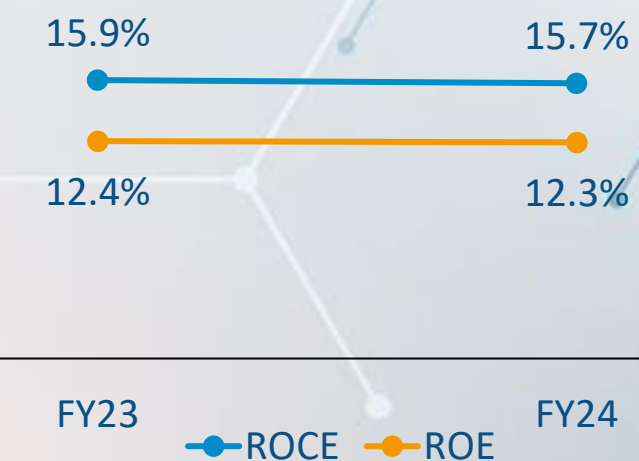
PAT (Mn) & PAT MARGINS (%)



Net Debt to Equity (X)



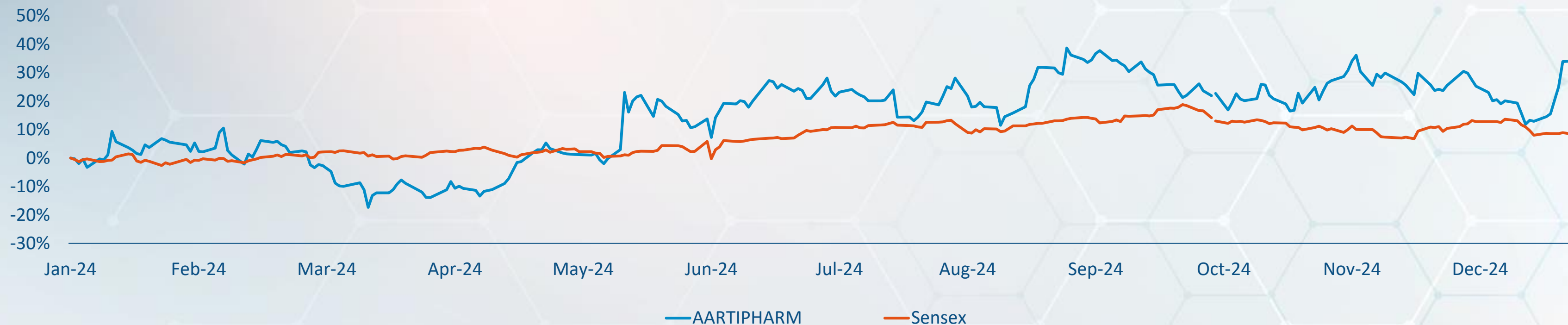
ROCE (%) & ROE (%)



CAPITAL MARKET INFORMATION

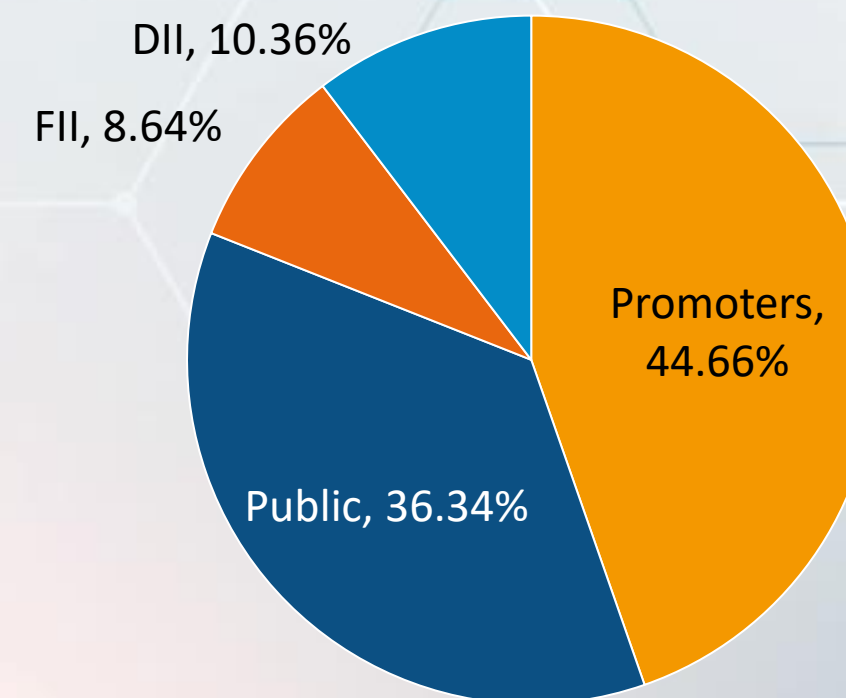


SHARE PRICE UP TO 31st December, 2024



PRICE DATA (AS ON 31 st December, 2024)	INR
Face Value	5.00
Market Price	686.25
52 Week H/L	722.00/400.00
Market Cap (Mn)	62,192.20
Equity Shares Outstanding (Mn)	90.63
1 Year Avg Trading Volume ('000)	334.66

SHAREHOLDING PATTERN (AS ON 31st December, 2024)



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THANK YOU

AARTI PHARMALABS LIMITED