



ITME - Bandung

Date - 13th Apr 2026

Our **COMPASS**

Purpose

Essential materials. Better lives.

Vision

The materials company of choice for customers and employees
Driving scale, growth and sustainability

Capabilities



Investing for the future



Lasting relationships



People first



Best-in-class assets and operations

Values



Act like owners



Be adaptable



Care deeply



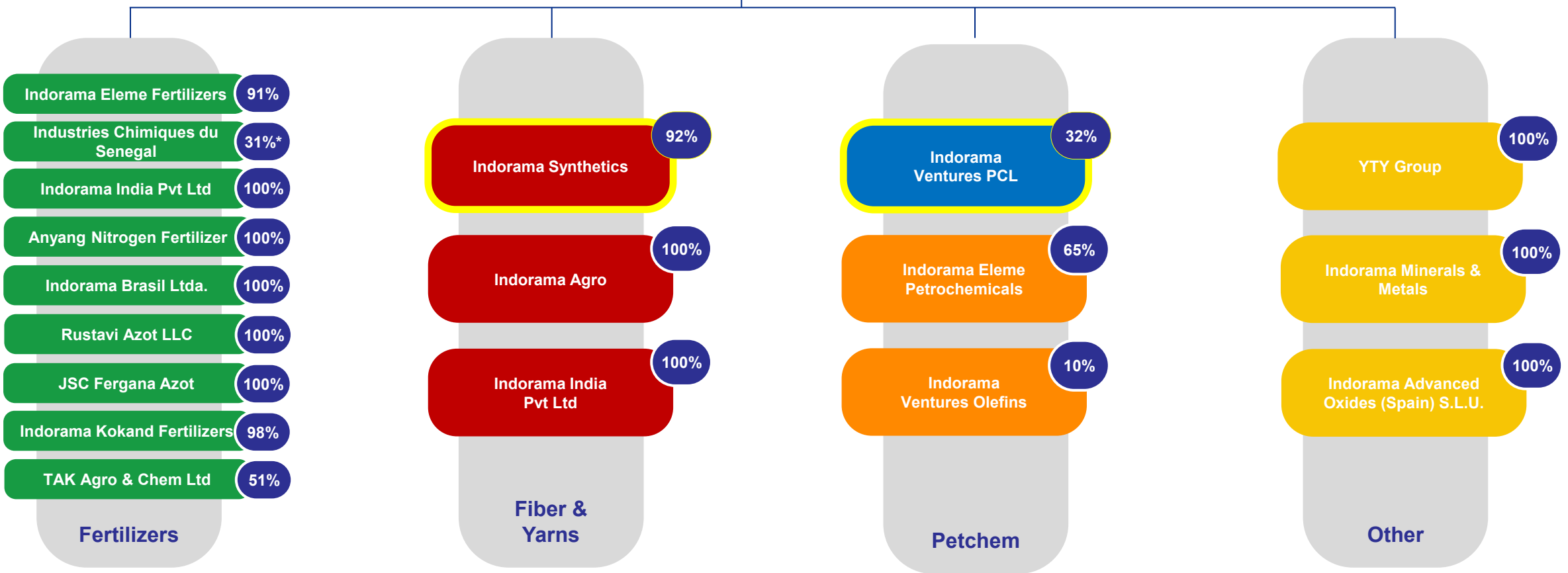
Deliver excellence

A Leading Materials Organization



Shareholding %

Public Company







* 47% is held by an affiliate.

A Brief History



Global Manufacturing Capacity

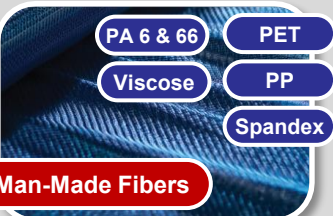
Million Metric Tons

REGIONS	PET ¹	OLEFINS	AROMATICS	EOD	FIBERS ²	FERTILIZER	Others	TOTAL
	2.2	0.7	2.4	4.7	0.4	2.2	-	12.6
	2.8	-	1.9	1.9	4.2	0.1	10.9	
	1.8	0.4	1.3	-	0.5	6.1	0.2	10.3
	6.8	1.1	5.6	4.7	2.8	12.5	0.3	33.8

¹ includes bottles. ² includes yarns & fabrics.

We Make Essential Materials

Fibers & Yarns



PA 6 & 66
Viscose
PET
PP
Spandex

Man-Made Fibers

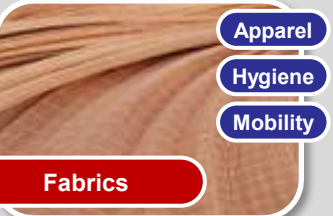


Cotton Fiber



Cotton
Poly
Wool

Spun Yarns



Apparel
Hygiene
Mobility

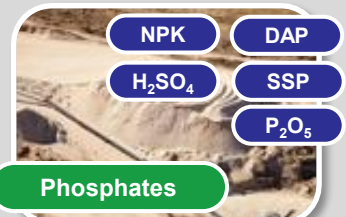
Fabrics

Fertilizers



Urea
AN
Amsul

Nitrogen



NPK
DAP
H₂SO₄
SSP
P₂O₅

Phosphates



Additives
Liquids
SRF
SOP

Specialties

Petchem



PX
PTA

Aromatics



MEG
Surfactants

EO Derivatives



NaCN

Specialty Chemicals

Polymers



COPP
HDPE
LLDPE
HPP

Polyolefin Resins



Virgin
Recycled

PET Resins & Bottles

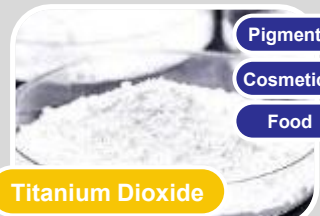
Other



Medical Gloves



Magnetite

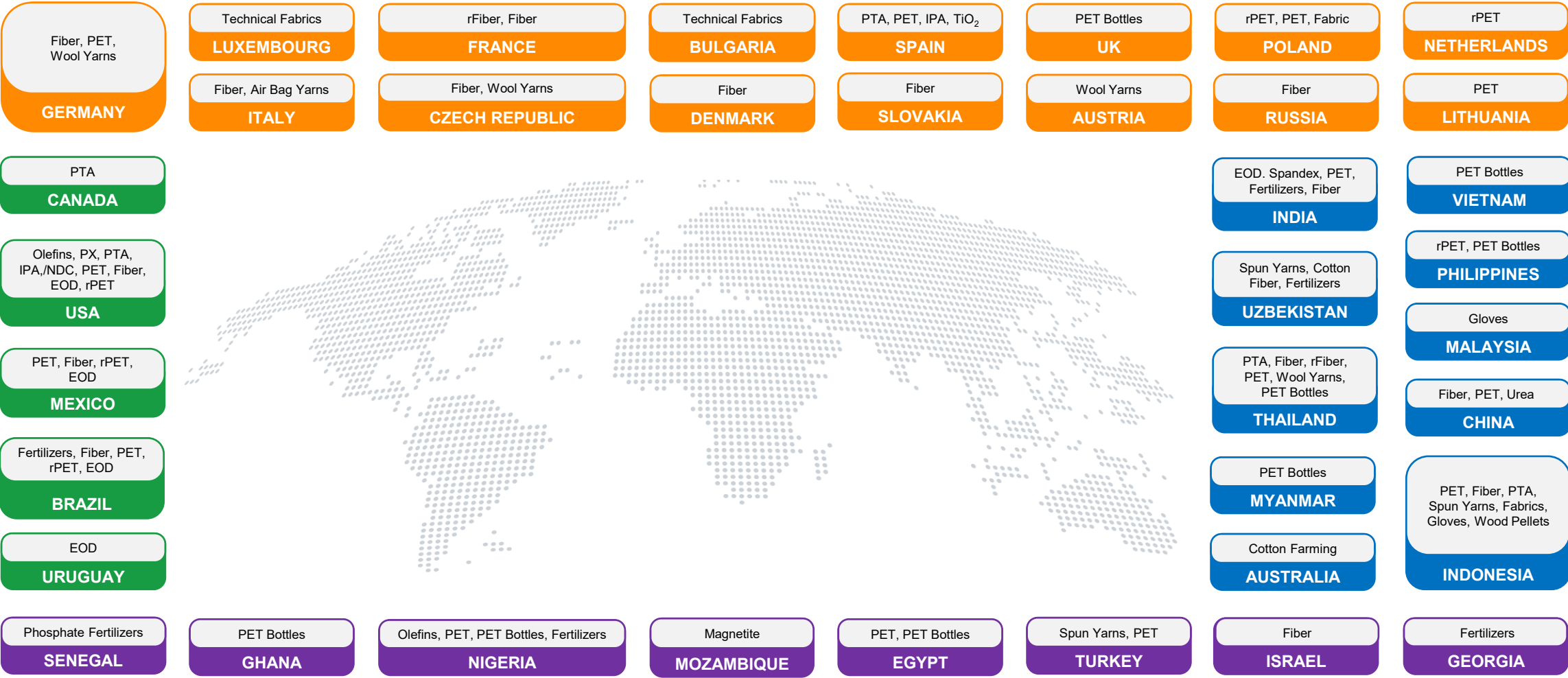


Pigments
Cosmetics
Food

Titanium Dioxide

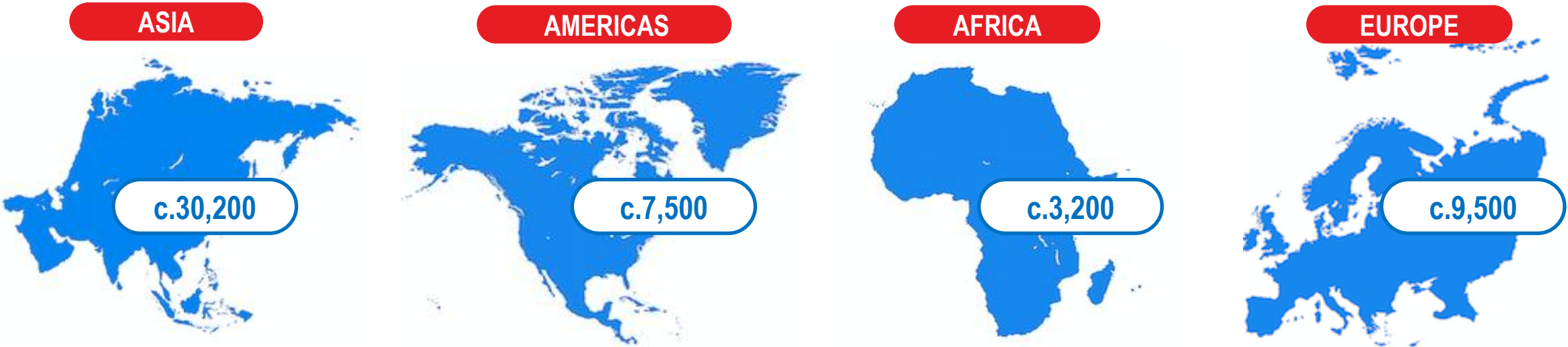
Indorama Group's Global Footprint

Over 100 sites on 38 countries.



The Indorama family includes: Indorama Ventures, Indorama Corp, and associates in Senegal.

Human Resources. **People First**



c. 50,000+ Employees¹

Global Enabling Functions

70+ Nationalities

¹ includes IVL and other associates





World Class Customers. **Serving global brands**

Strategic Brands. Investing in innovation

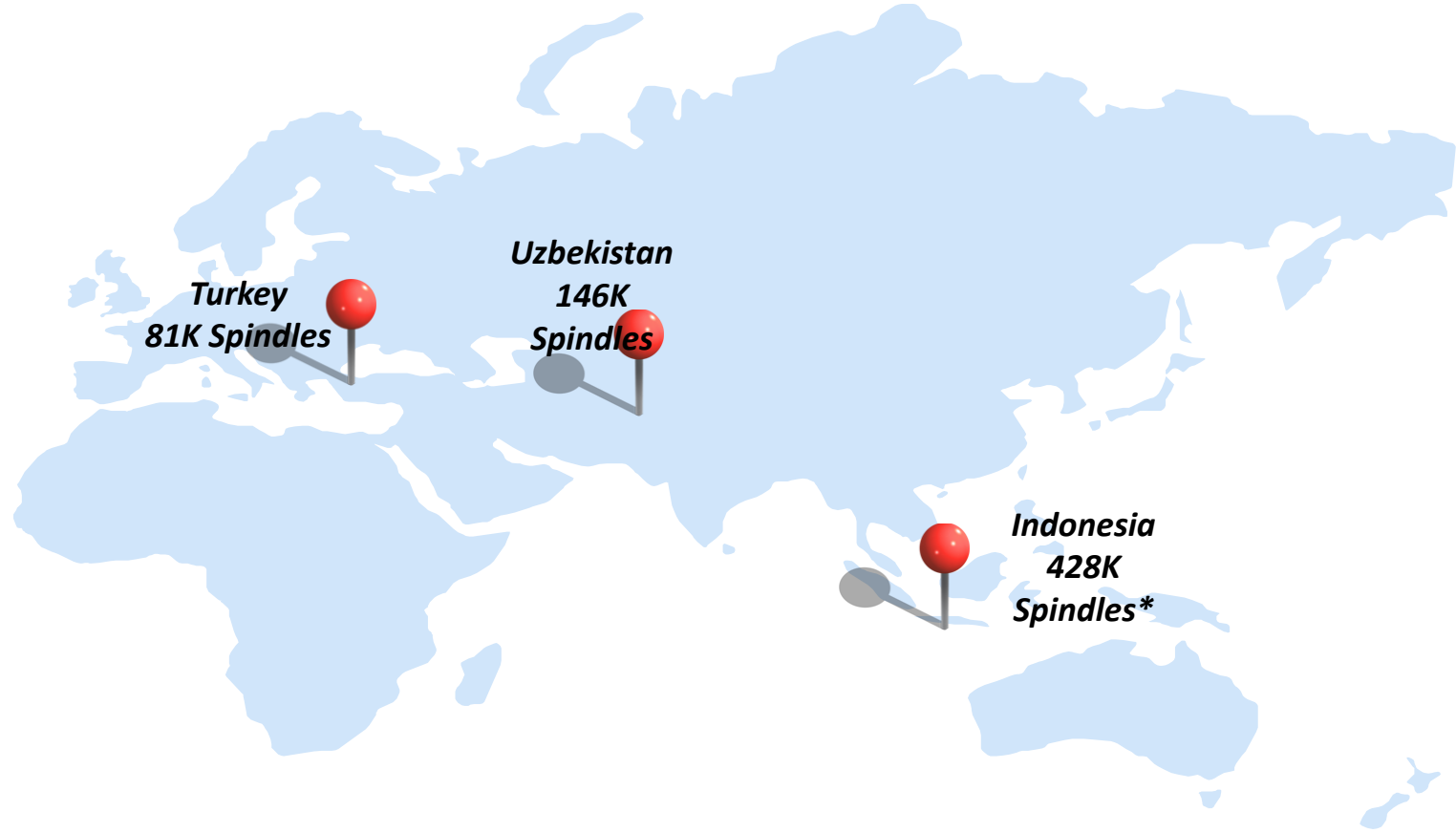
		
		
		

Strategic Supply Chain Relationships

Spun Yarn Business (SYB)

SYB Four Locations - 655,000 Spindles



SYB - Manufacturing asset in Four Countries

Location	Manufacturing Units	Installed Spindles	Product (Spun Yarn)	Capacity (MTs/pm)
Indonesia	PT. Indorama Synthetics, Tbk	163,968	Cotton, synthetics and others speciality yarns	3,500
Indonesia	PT. Indorama Teknologies	263,976	Cotton & Polyester Sewing Thread	5,700
Turkey	Indorama Iplik Sanve Tic A.S.	81,168	Cotton & Synthetics / blends	1,800
Uzbekistan	Indorama Kokand Textile JSC	145,968	Combed Compact Cotton	3,100

Raw Material Consumed and Product Mix

Products :

1. 100% Polyester Spun Yarn
2. Sewing Thread
3. 100% Polyester & Blended (Recycle Yarn)
4. 100% Cotton Spun Yarn
5. 100% Acrylic - Dyed Yarn
6. Various Polyester Cotton Blend

Raw Materials Consumed :

1. Cotton : 100% - Import (Contamination Free)
US , Brazil , Australia and Greece
2. Acrylic - Import (Thailand)
3. Polyester : Local
4. Polyester Recycle – Import (China , India)
5. Bamboo - Import (China)

Indo-Rama Synthetics (Indonesia)

Purwakarta



Campaka



Startup in 1976

No of Plants : 15

*Installed Spindles
428,000*

*Product
Spun Yarn*

*Employees
3,500*

Indorama Kokand Textile (Uzbekistan)



Startup in 2011

No of Plants - 4

Installed spindles 146,000

Product - 100 % Cotton

Employees -1100

Indorama Iplik (Turkey)



Profile

Indorama Iplik Sanayi Ve Ticaret A.S. (Iplik) was set up in Turkey in 1998.

Startup in 1998

No of Plants - 2

Capacity of 81,000 spindles

Product 100 % Poly Poly Visc

Employess 460

India & Indonesia - A New Force in Global Textiles

China+1 : An Opportunity

US Market Shift

China: 39% → 24%

- US tariffs of 25–145% on Chinese goods driving diversification
- US T&A imports: US\$ 108 Bn — India & Indonesia combined only 13%
- Vietnam constrained by capacity — India+Indonesia can fill gap

EU Market Shift

EU T&A imports: US\$ 127 Bn

- EU Carbon Border Adjustment & Sustainability mandates reshaping sourcing
- EU-Indonesia CEPA under negotiation — early movers gain tariff advantage
- India-EU FTA in progress — combined entry point for EU supply chains

Brand Diversification

Global Top 100 brands diversifying

- Nike, Inditex, H&M, PVH actively reducing China dependency
- Full-package sourcing from integrated hubs in high demand
- ESG compliance increasingly mandatory — India+Indonesia can deliver

IN INDIA BRINGS

- ✓ Competitively priced spinning, weaving & knitting machinery
- ✓ 100+ years of spinning technology expertise
- ✓ US\$ 145 Bn T&A industry — #2 global fiber consumer
- ✓ 45 Mn+ workers | US\$ 35 Bn exports
- ✓ R&D, digital transformation, Centres of Excellence
- ✓ PLI & TUFs: government-backed 'Make in India' machinery
- ✓ Rieter, Trützschler, LMW manufacturing locally



ID INDONESIA BRINGS

- ✓ 3.8 Mn T&A workers — strong shop-floor execution culture
- ✓ ~US\$ 41 Bn sector | 4,527 companies
- ✓ Dominant MMF & garment manufacturing base
- ✓ US\$ 35 Bn domestic market (40% served by imports)
- ✓ RCEP, ASEAN, EU-CEPA market access
- ✓ Established buyer relationships with US & EU brands
- ✓ Strategic location: Indian Ocean & Pacific shipping lanes

Indonesia - Gateway to Southeast Asia

~US\$ 41 Bn

T&A sector sales

3.8 Mn

T&A employees

4,527

T&A companies

US\$ 11.4 Bn

Exports (2024)

275 Mn

Population – largest SEA market

US\$ 35 Bn

Domestic textile market

Why Indonesia is Critical:

- Strategically positioned at the crossroads of Indian Ocean & Pacific shipping lanes
- Member of ASEAN, RCEP - preferential access to US\$ 5+ Tn regional market
- Strong MMF & garment base ready for vertical integration with Indian yarn & fabric

Expansion Opportunities for Indian Machinery Manufacturers

01

Spinning Mill Modernisation

Indonesia's 80%+ ageing spinning equipment base - immediate market for ring frame, rotor & air-jet replacements. Target: 500,000+ spindles

02

New Integrated Parks

10 new integrated textile parks planned under Indonesia Vision 2035. India can be the machinery supplier of choice from Day 1

03

Future Growth

Last 5 years: 5.5Bn T&A Invested
Next 10 Years: 40 Bn required

04

After-Sales & Service Hub

Establish a regional service centre in Indonesia to support Indian machines across SEA — a competitive moat vs. European OEMs

05

Technology Licensing

License Indian spinning tech to Indonesian manufacturers for local assembly — boosts adoption, creates JV opportunities

Thank you

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