



Packaging for better

SIG Group

Samuel Sigrist, CEO

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Alternative performance measures

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Some financial information in this presentation has been rounded and, as a result, the figures shown as totals in this presentation may vary slightly from the exact arithmetic aggregation of the figures that precede them.

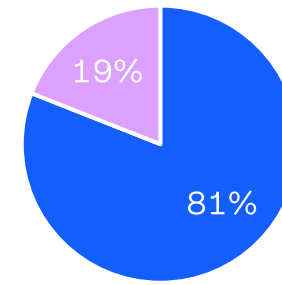
**SIG is a leader
in aseptic and sustainable
packaging for liquid food and
beverages**



Leading market positions across packaging substrates

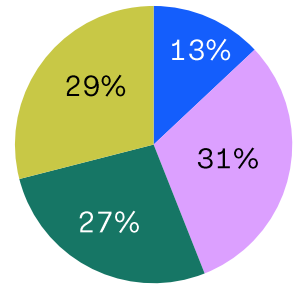
Revenue by substrate 2023

Carton
Bag-in-box & spouted pouch

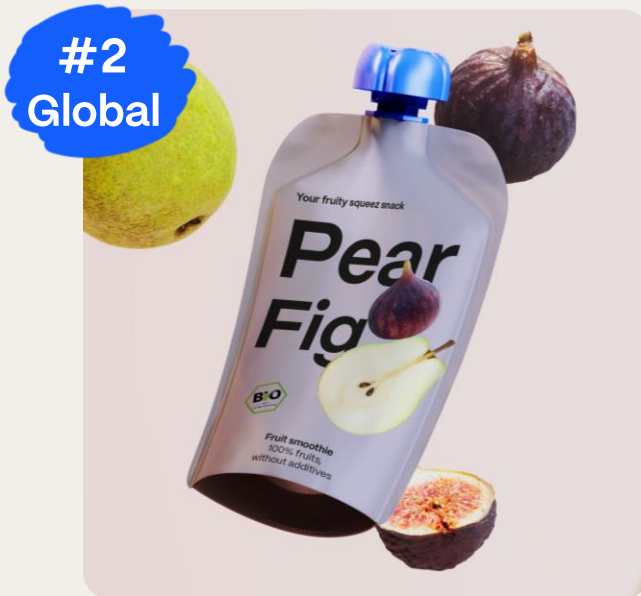


Revenue by geography 2023

Europe
Americas
Asia
IMEA



Spouted pouch¹

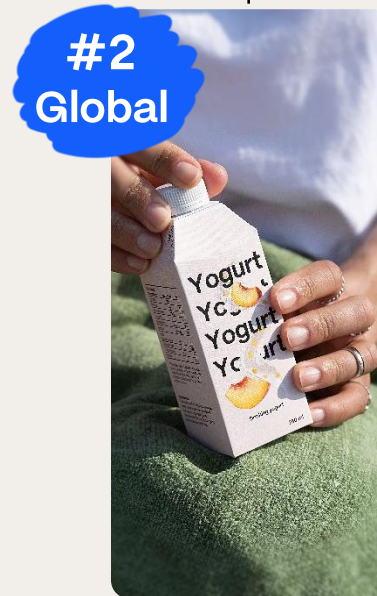


Dairy & yogurt drinks, fruit purees, baby food, sauces

50ml - 500ml+ packs

Carton

Aseptic



Fruit juices, non-carbonated soft drinks, liquid dairy and plant-based alternatives, liquid food

65ml - 2 L packs

Chilled



Bag-in-box



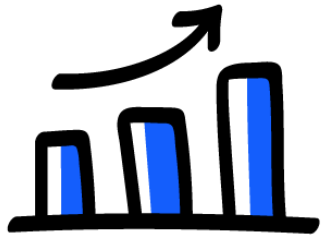
Food service, smart dispensing in dairy, water, beverage concentrates, wine, liquid food, tomato products

2L - 1,300L packs

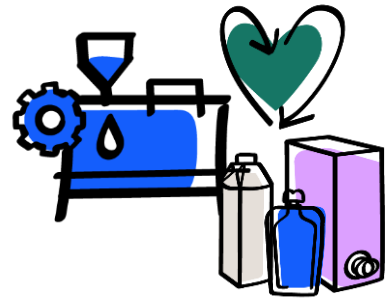


¹Represents spouted pouch systems

SIG's distinctive model for superior value creation



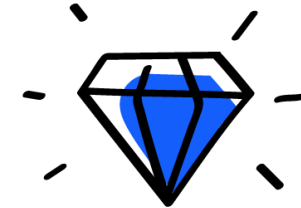
**Attractive industry
and end markets**



**Systems-based
business model**



**Industry-leading
innovations**



**Superior
value creation**



SIG has the right packaging systems and solutions portfolio to capture above-average growth

Healthy nutrition



Unique packaging and filling capabilities

Differentiated packaging shapes
SIG DomeMini, SIG Smile

Unique filling capability
(e.g., Drinkspus and aseptic pouch) with SIG Tech Centers as category co-creation hubs

Affordability



Leading in TCO and flexible systems

Lowest TCO performance defined by industry-leading output and waste rates

Unmatched size flexibility

AI powered Smart Service Solutions

Sustainability



Sustainability leader across substrates

Lowest carbon and fully recyclable with SIG Terra portfolio

Ready to be filled on current installed base

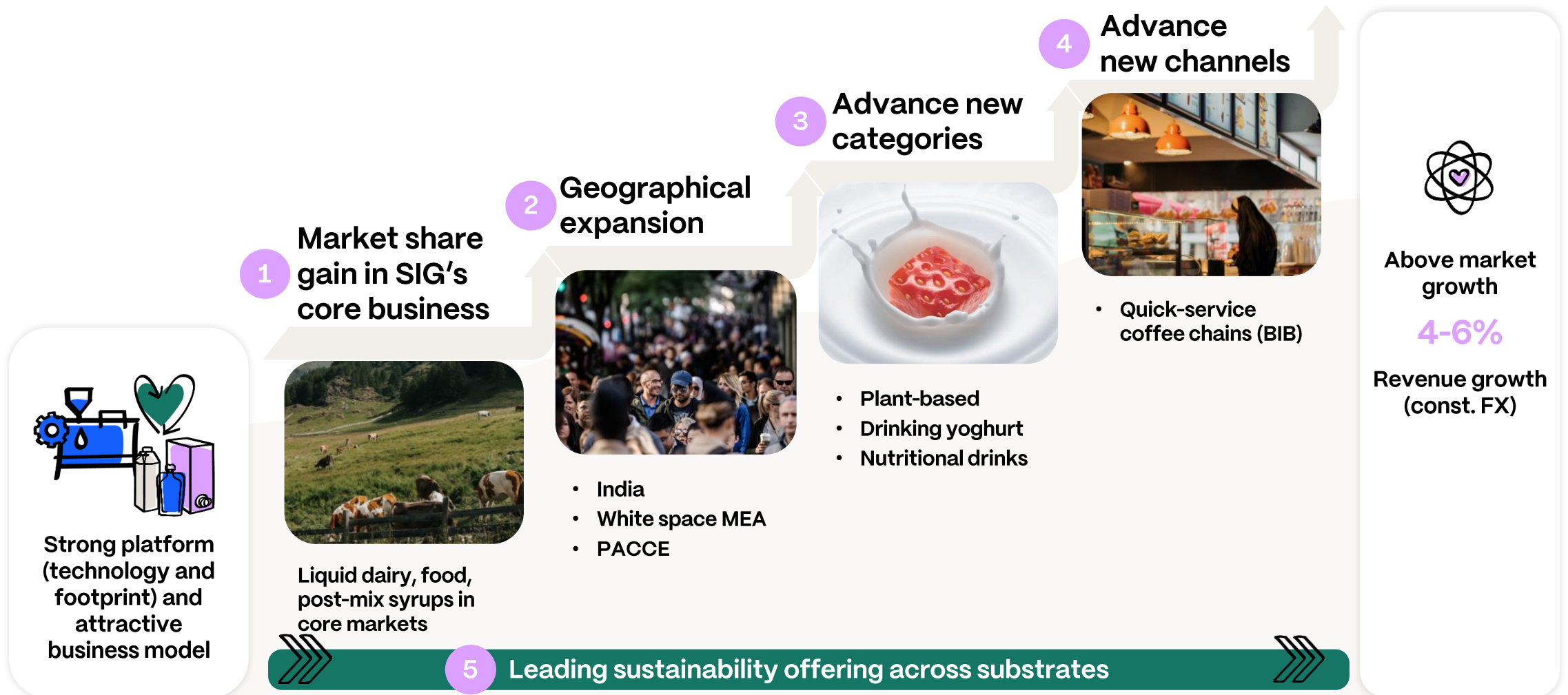
Convenience



Foodservice champion

Bag-in-box foodservice solutions with bespoke connection systems for smart dispensing (dairy, syrups and sauces)

Multi-faceted growth strategy along core, geographies, categories, and channels supported by sustainability

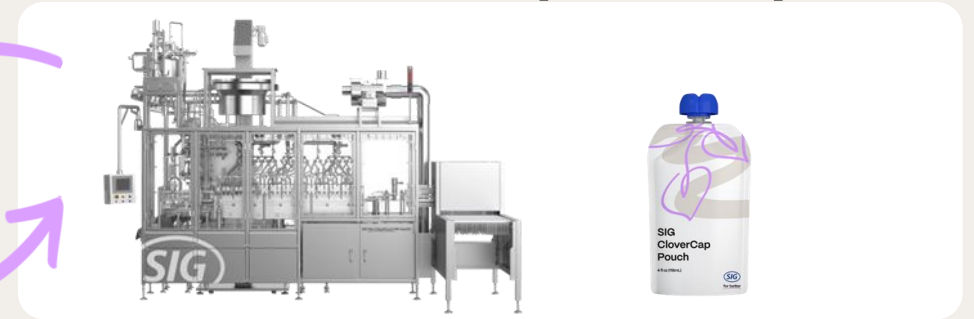


SIG's proprietary aseptic carton platform driving efficiency gains across all substrates

Aseptic carton



Spouted pouch



Cross-substrate
technology expertise

Bag-in-box

Our main areas of innovation

Recently launched key innovations

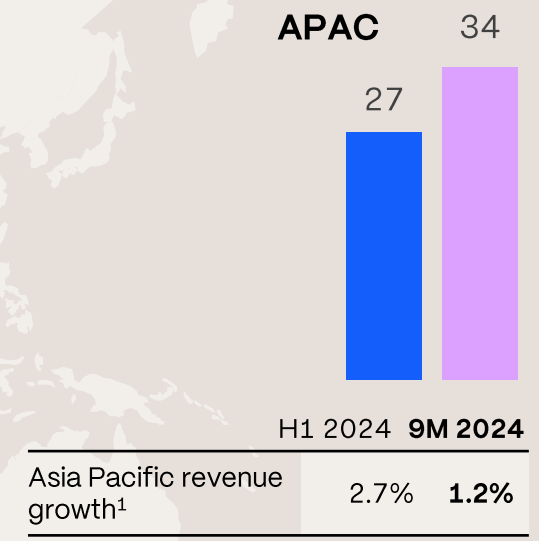
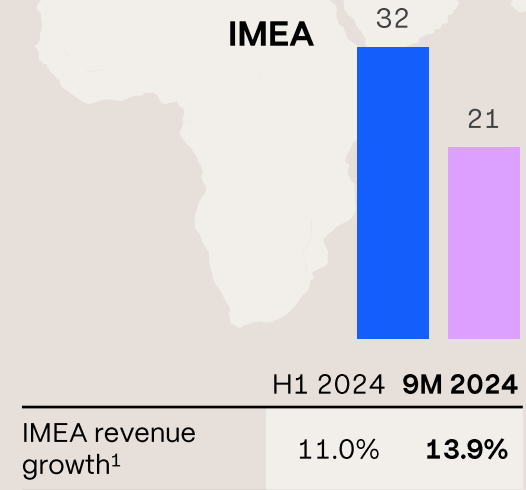
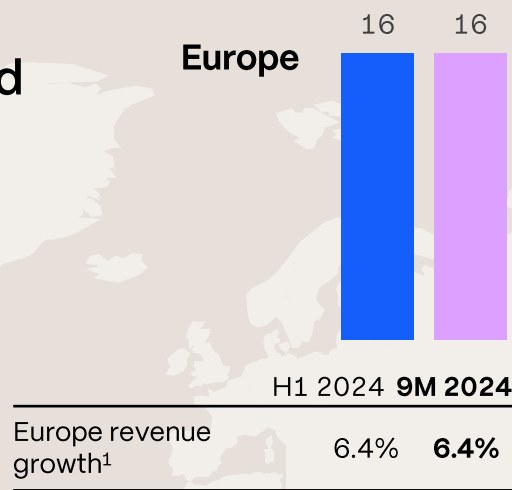
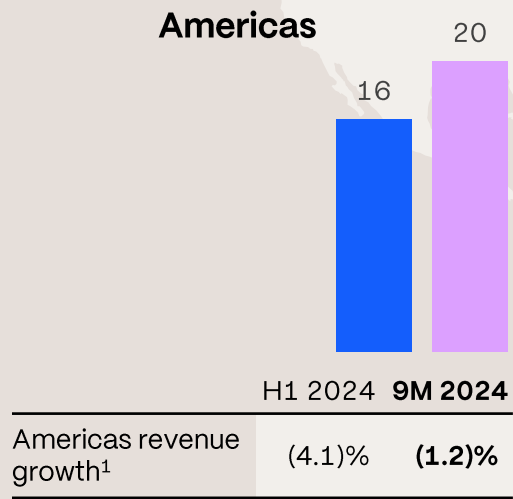
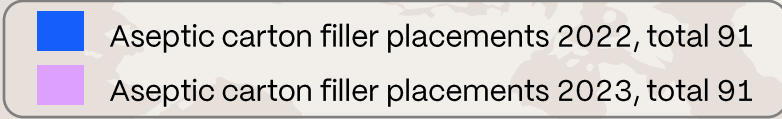
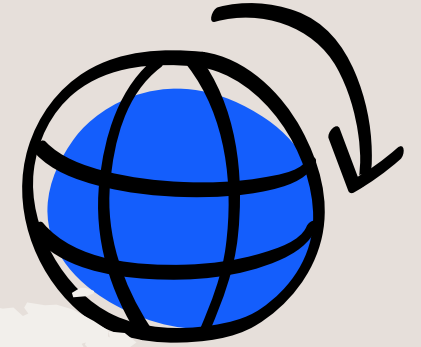
Pioneers in sustainable packaging solutions

Highest product, format & closure flexibility



Carton continues to thrive +6.7% revenue growth in H1 2024

Aseptic carton filler placements and regional revenue¹ growth



¹Regional revenue growth H1 2024 vs. H1 2023 incl carton, bag-in-box and spouted pouch, at constant currency

Creating value by category and channel

November 2024



'Chess-board' of available channels – grow the core and unlock adjacencies



Home						On-the-go, including Leisure and events						On premise					Home food delivery	At work																					
Online - Delivered		Grocery - Brought home				On-the-go non-food		Food-to-go		Leisure		Cine.	Temp. events	QSR	Rest-aurant	Café/ Bar	Bar/ club	Sports	Canteen		In-office	Mixed (hospitals, etc.)		Oth.															
Online D2C	eRetail	Hypermarkets	Supermarkets	Discounters	Cash & Carry	Traditional trade	Convenience stores	Petrol stations	Night shops	Vending machines	Kiosks (press, tobacco..)	Bakeries	Sandwicheries	Other	Theme parks	Theatres	Event arenas	Gaming arcades	Cinemas	Temporary music events	Other temporary events	QSR/fast food	Restaurant	Food pubs	Café/Bars	Night bar/clubs	Sports clubs/fitness	Restaurant with website	Food delivery (Deliveroo)	Youth canteen	Adult canteen	Retirement home	Small office	Medium office	Large office	Hospitals	Police stations	Other	Vending machines

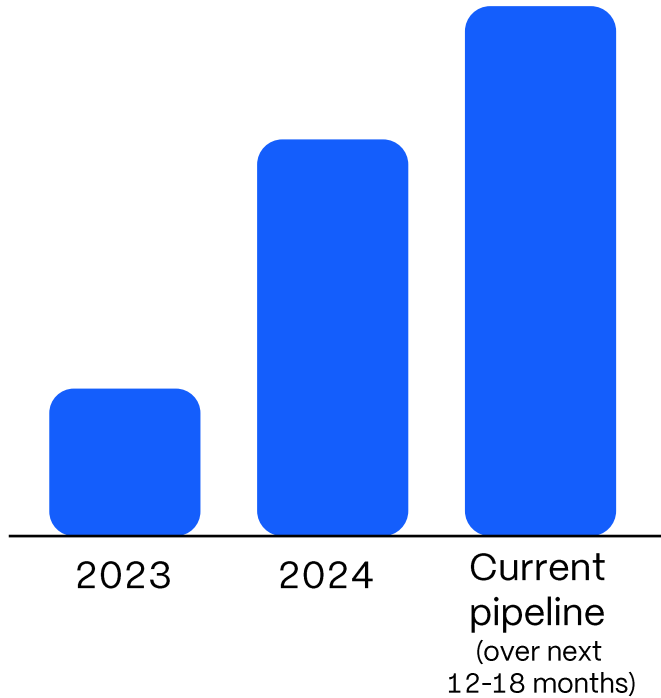
Grocery Co



● Low coverage ● Limited coverage ● High coverage

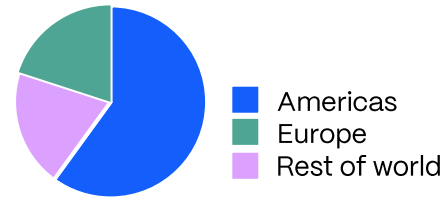
Synergy wins gaining momentum with solid pipeline

Number of synergy deals signed

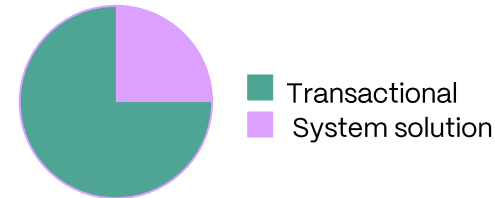


Status at acquisition

Revenue by geography



Revenue by sales structure



Majority of revenue transactional at acquisition

Status as of H2 2024

Pipeline by geography

~50% of pipeline based in **emerging markets**

Pipeline by sales structure and filling technology

~3/4 of global pipeline structured as **systems solutions**

~60% of synergy pipeline based on **aseptic filling technology**

Bag-in-box case study

Setting new standards in foodservice

Lighthouse customer win with 2nd largest dairy in China, aseptic system solution



Proposed concept



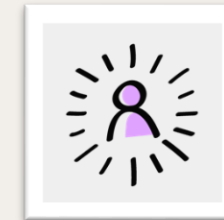
Ease operation.

- No need to pour out from multiple 1L packaging



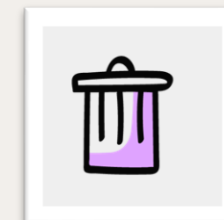
Ensure food safety.

- Close-loop dispensing minimizing exposure.
- Close system from bag-in-box extending shelf life.



Hygienic.

- Disposable bag-in-box reducing workload of daily cleaning
- Risk would be better controlled from cleaning of the milk box



Reduce waste.

- Bag-in-box has excellent evacuation vs. incumbent set-up
- Post-consumed packaging waste significantly reduced

Spouted pouch case study

Unlocking aseptic concept for spouted pouch – first inline aseptic filling machine

Lighthouse customer win with largest banana puree producer in the world, aseptic solution

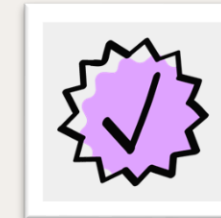


Second filler signed with customer



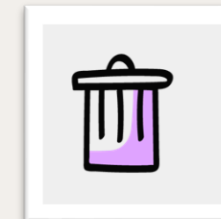
Product nutrition.

- Aseptic technology ensures nutritional content without the need for preservatives or additives



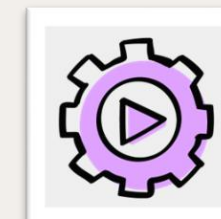
Food appearance.

- Aseptic technology allows contents to keep its color and appearance



Reduce waste.

- Aseptic technology enables long shelf life without a cold chain and without added sugar



Continue to lower TCO.

- Next stage development: significant increase in filler output per hour higher

Customer win examples

Offering new revenue opportunities to existing customers



Tirol, one of the largest dairies in Brazil, is an established carton customer.
Expanding into 10L bag-in-box for ice cream and spouted pouches for yoghurt



Amul is an established carton customer
Category expansion into spouted pouch for sweetened condensed milk to largest dairy in India.

SIG key success factors:

- Cross-selling synergy and collaboration
- Technology and know-how
- State of the art bag aseptic filler (BiB)

Key features:

- Full system solution
- 8-year agreement

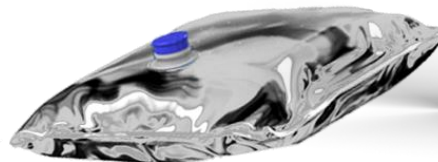


SIG key success factors:

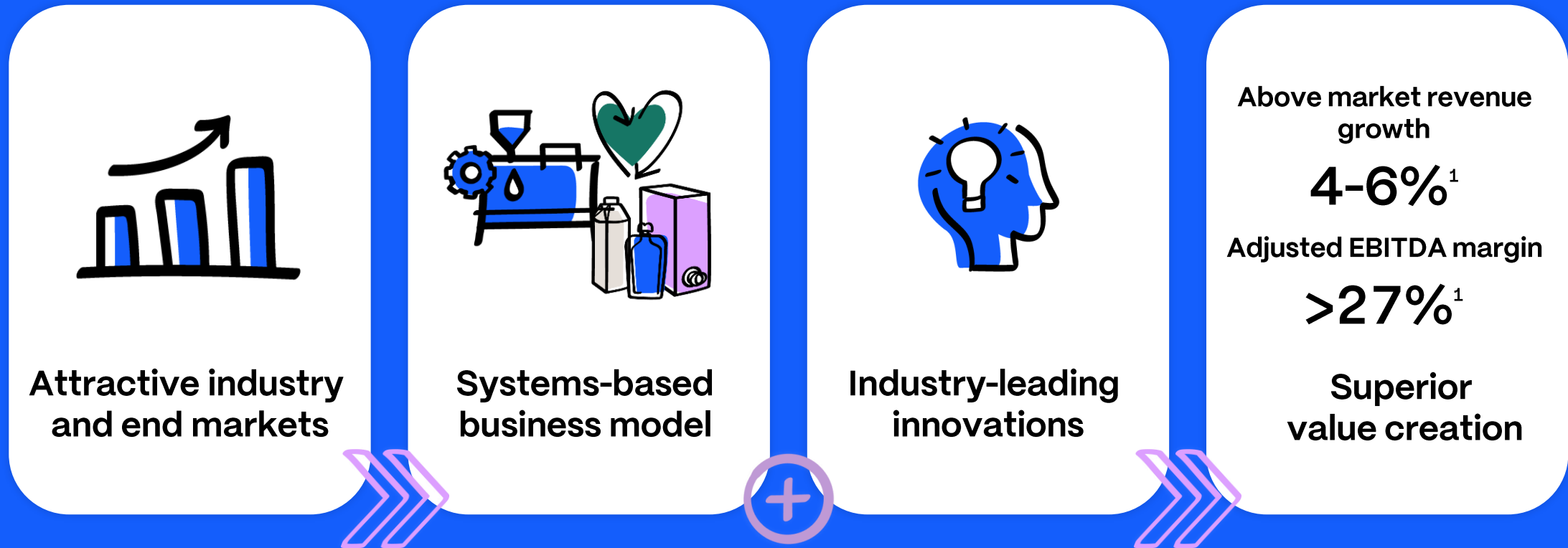
- Cross-substrate collaboration
- Technology and know-how
- Sustainability: recycle ready material

Key features:

- Can to spouted pouch conversion
- Full system solution



SIG's distinctive model for superior value creation





for better

