

Constantia Flexibles

Company presentation

January 2025

Vienna, Austria





Company intro



Company growth



Global production network



Sustainability



Innovation and R&D



Products

The management of Constantia Flexibles

Management board



David Spratt
CEO



Richard Kelsey
CFO

Executive committee



Michael Müller
EVP Group HR



Marc Rademacher
EVP Consumer
Commercial



Thomas Glossner
EVP Procurement



Alan Saxon
EVP Operations



Pierre-Henri Bruchon
EVP Pharma Division

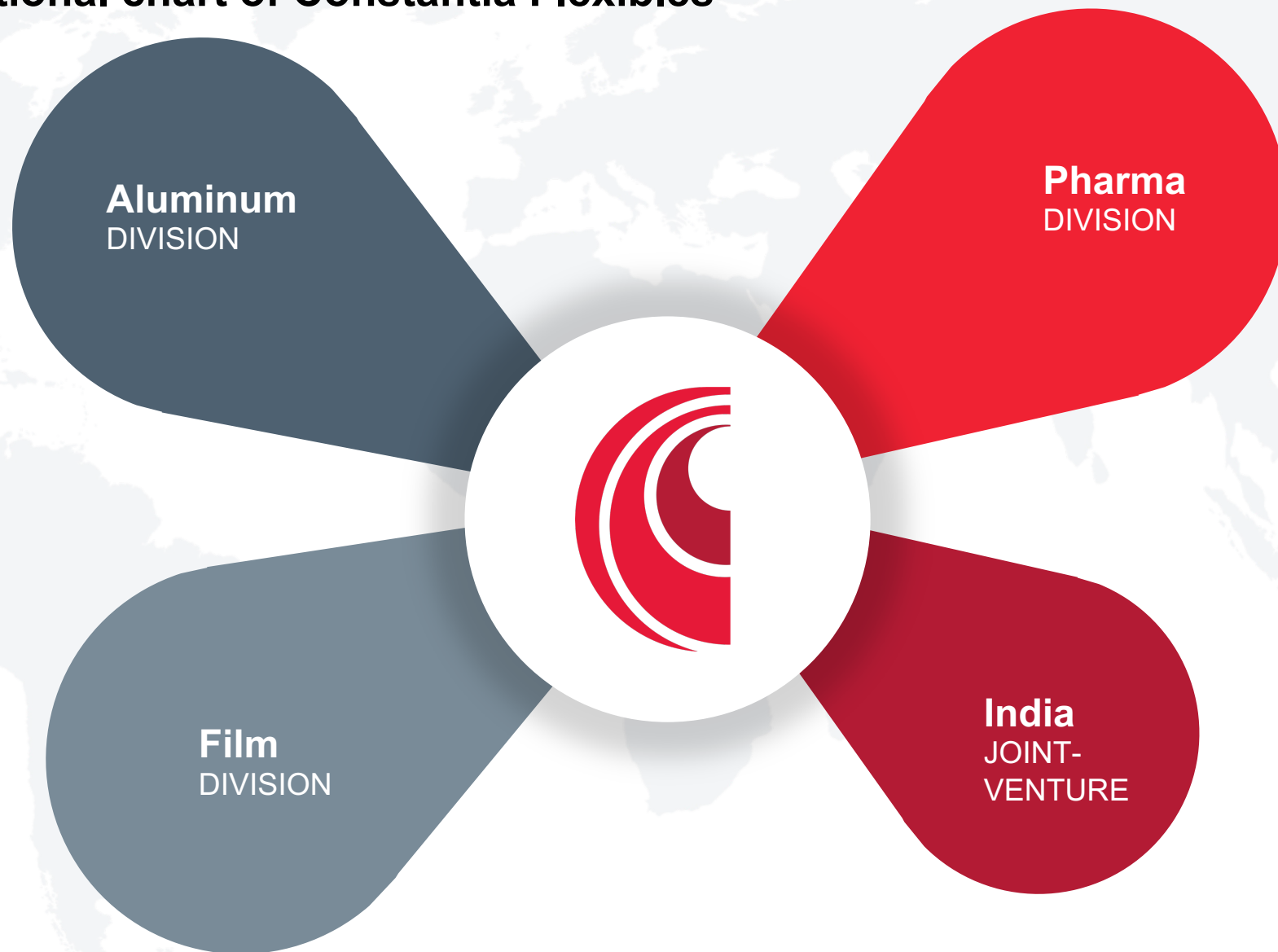


Daniel Winkler
EVP Aluminum Division &
Group Sustainability



Robert Plimbley
EVP Film Division

The organizational chart of Constantia Flexibles



Constantia Flexibles in a nutshell

Based on the guiding principle of **People Passion Packaging**, we manufacture tailor-made flexible packaging solutions.




#3
Globally



#2
Europe

>11,080*
Employees




Headquarters
In Vienna, Austria



45*
Production sites in 19* countries



2 business segments



Segment	Percentage
consumer	71%
pharma	29%

Sales by region

Region	Percentage
Europe	71%
America	19%
Middle East / Africa / Australia	6%
Asia	4%

Production

Material	Percentage
Aluminum based	54%
Film based	44%
Paper based	2%

Supporter
One Rock Capital Partners



*incl. Joint Venture SB-Constantia in India

Constantia Flexibles in a nutshell

Based on the guiding principle of **People Passion Packaging**, we manufacture tailor-made flexible packaging solutions.




#3
Globally



#2
Europe

>8.650
Employees



37
Production sites in 18 countries



Sales by region

Europe	71%
America	19%
Middle East / Africa / Australia	6%
Asia	4%

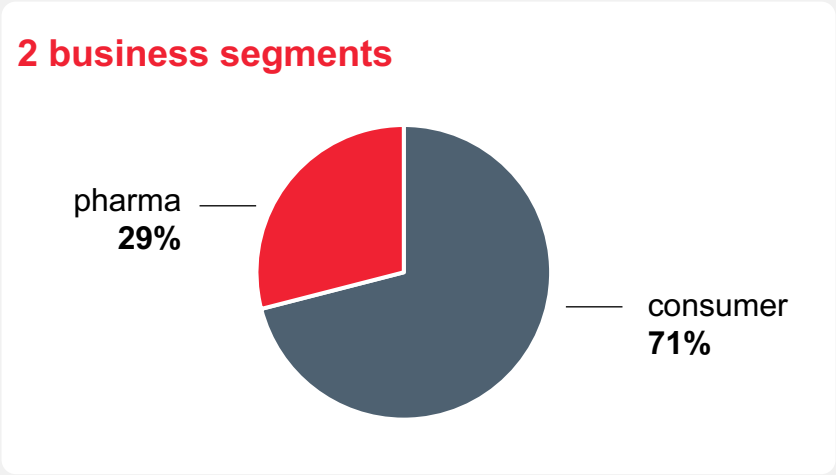
Production

Aluminum based
54%

Film based
44%

Paper based
2%

Headquarters
In Vienna, Austria

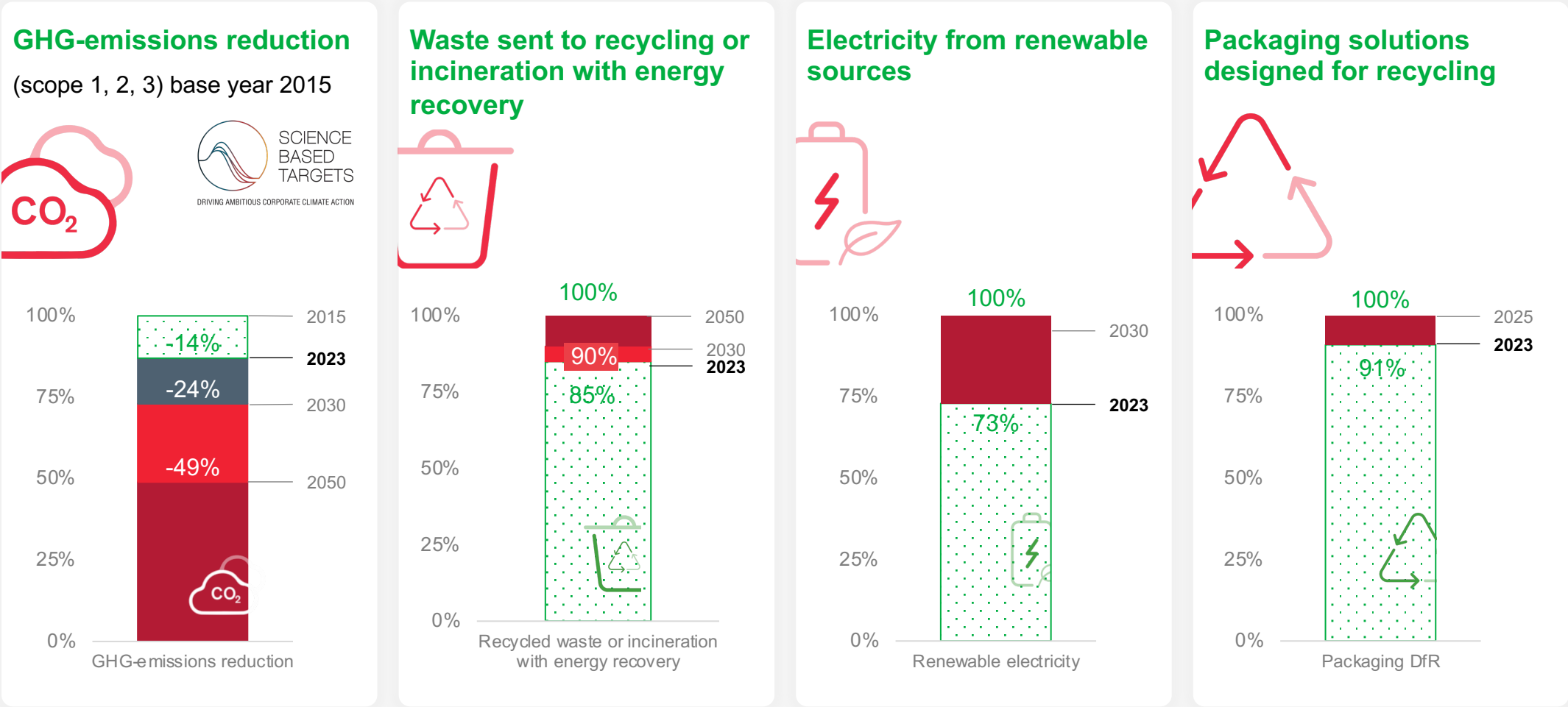


Supporter

One Rock Capital Partners



Our sustainability targets and the status quo



Our ambitious transformation

Developing packaging materials Designed for Recycling (DfR)

Collecting

+

Sorting

+

Recycling

Responsible sourcing





Reporting publicly and transparently

Platinum Rating



Setting ambitious targets for GHG emissions reduction



SCIENCE
BASED
TARGETS



Collaboration along supply chains















Verifying externally our high standards

for SMETA, quality management, product safety, and environment at plants worldwide

Covering all materials with our 360 degrees approach



Our vision

We envision a world in which packaging provides people with the highest benefit at the lowest impact on the environment.

Our mission

We rethink packaging every day to make a positive, more sustainable and meaningful contribution to our customers and the environment.

We are driven by passion and our aspiration for know-how and competence to make people's lives healthier, better and safer.



Our long-term partnerships with customers

 Consumer



 Pharma




We manufacture globally


A global manufacturer of flexible packaging solutions for consumer and pharma products.





Global production network



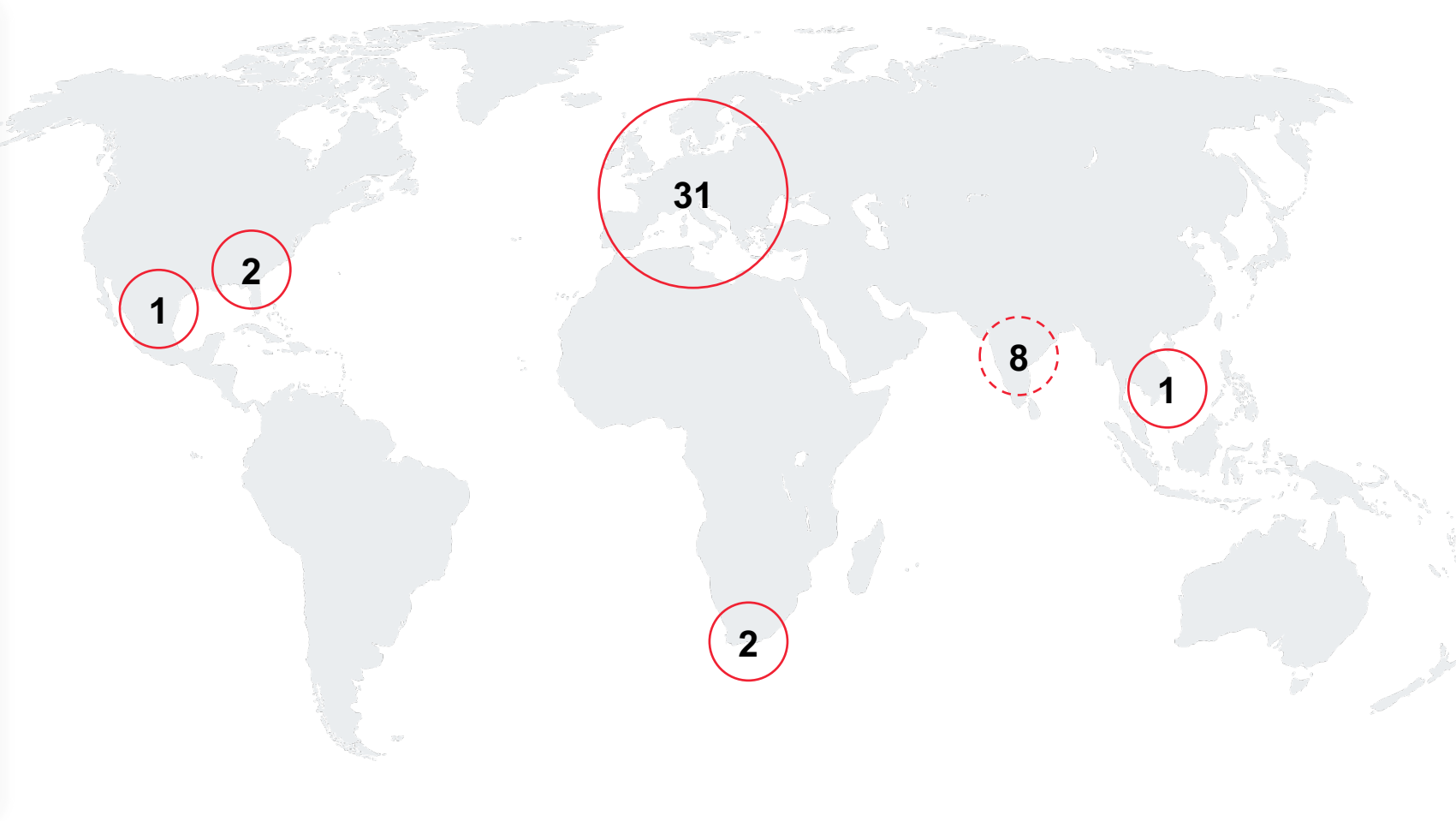
45 plants*

 Consumer


 Pharma



19 countries*




Consumer business plants

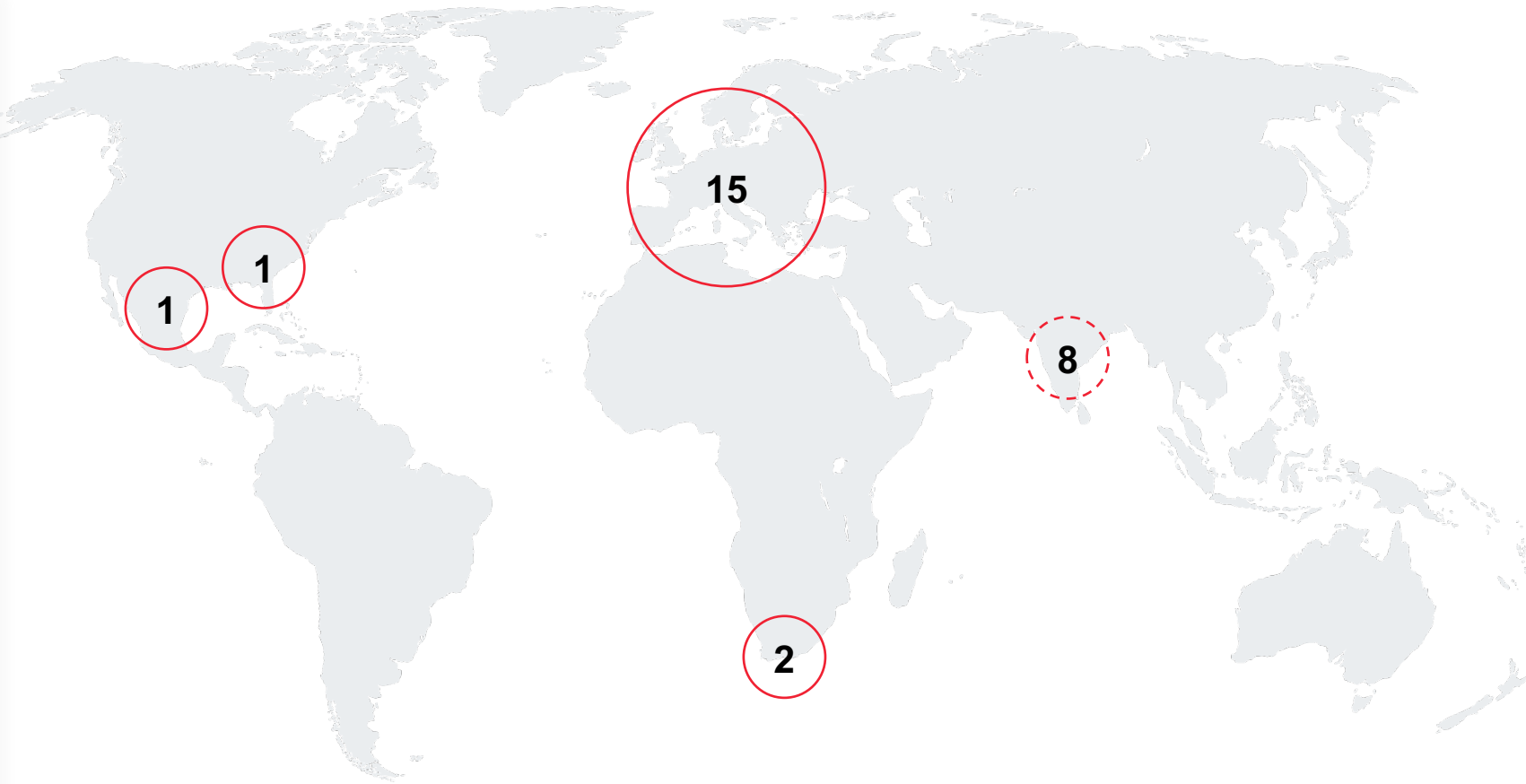


27 plants*

 Consumer




16 countries*





*incl. Joint Venture SB-Constantia in India

Pharma business plants



12 plants

 Pharma



11 countries



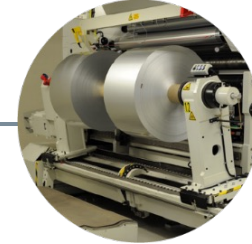
Pharma satellite concept: global scale with local flexibility

Hub

Incoming goods
Foil, Film, Paper



**Lacquering
lamination**



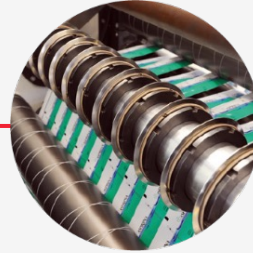
**Master reel
slitting**

Satellite

Satellites are located near customers, specializing in small- to medium-sized volume orders, and generating major market shares in local and/or surrounding countries.



**Printing
gravure / flexo**



**Printed reel
slitting**



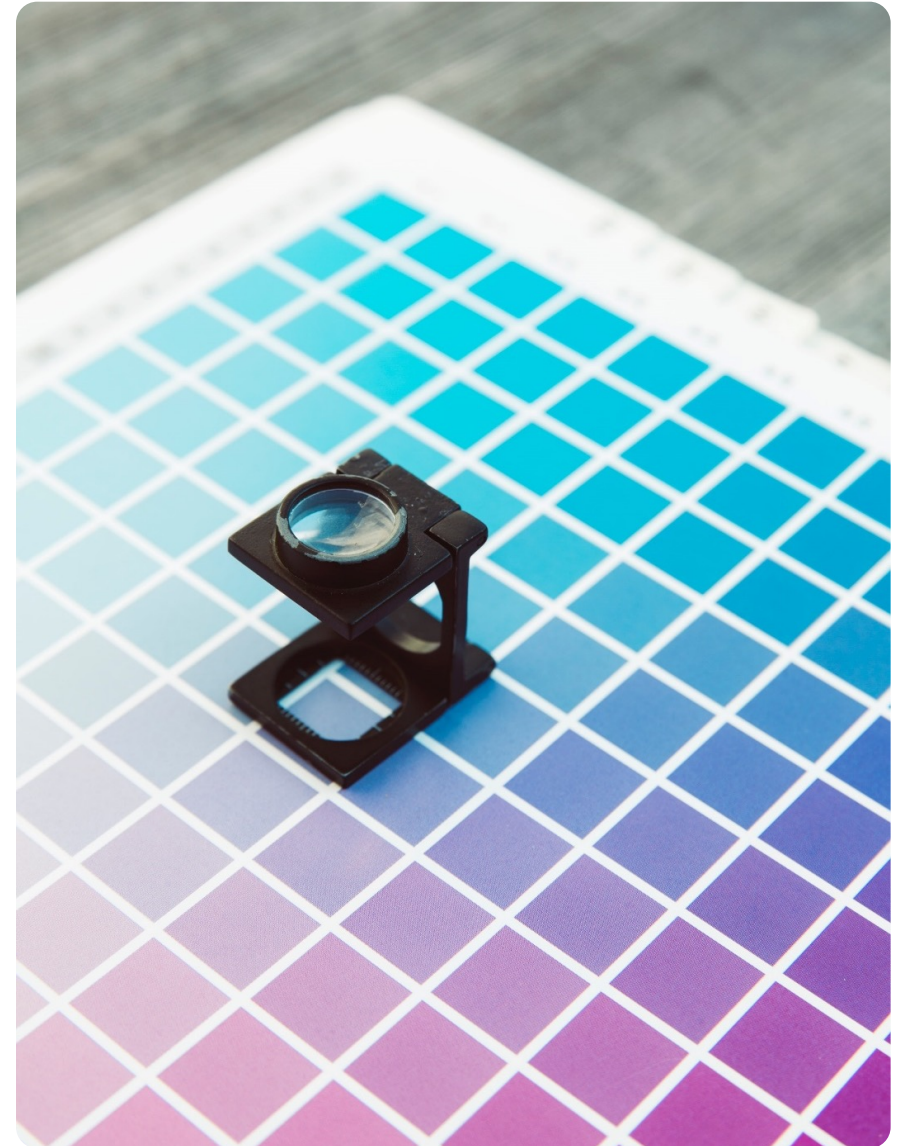
**Final
packaging**



Shipping

Superior quality, continuous improvement and product safety

- ✓ Integrated corporate-wide quality management system ISO9001 based
- ✓ Advanced certifications according to international standards, our plants meet all the demands facing a global company
- ✓ Consistent traceability in our whole supply chain, from raw materials to each single packaging unit
- ✓ Raw materials are sourced from reliable suppliers
- ✓ Full compliance to legal and customer requirements
- ✓ Competent quality control labs at our sites



Health, Safety, Security & Environment (HSSE)

H

Health

S

Safety

S








Security

E

Environment

HSSE is an integrated part of the company's business and decision-making process and drives forward Operational Excellence.

We protect all assets, especially

-  Personnel
-  Contractors
-  Neighbors
-  Machinery
-  Equipment
-  Reputation
-  Environment

LTIFR reduced by more than 40%

The Lost Time Injury Frequency Rate (LTIFR) improved within Constantia Flexibles Group worldwide by more than 40% within the last three years.

Following our motto

ZERO LOSS – NO HARM

Accidents affect your loved ones too.



We invest in innovation.

Innovation is at the core of our DNA.

We strongly believe that only those who rethink packaging every day will succeed together with customers and ultimately with consumers alike.



Our 8 innovation themes



**Resource
management**



**Sustainable
Business**



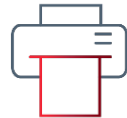
**Circular
Economy**



**Product
safety**



Digitalization



**Digital
printing**



**Consumer
centricity**



**Value
engineering**

We recognize innovation as a **key driver for profitable growth** and **strive to become innovation leader** in **strategically prioritized market segments** by strongly focusing group efforts on the key market and customer needs.

Global R&D network & goals

We act as a global company for our global customers!

- Driver of push innovations based on cooperation with suppliers and other external partners
- Supporting market and customer-driven innovations
- Improving efficiency in raw materials usage and production
- In- and external technical consultant
- Global knowledge transfer and standardization of raw materials
- Sustainable transformation



R&D goals for more sustainable packaging development



Thinner packaging
at same performance



Designed for Recycling packaging
at same performance



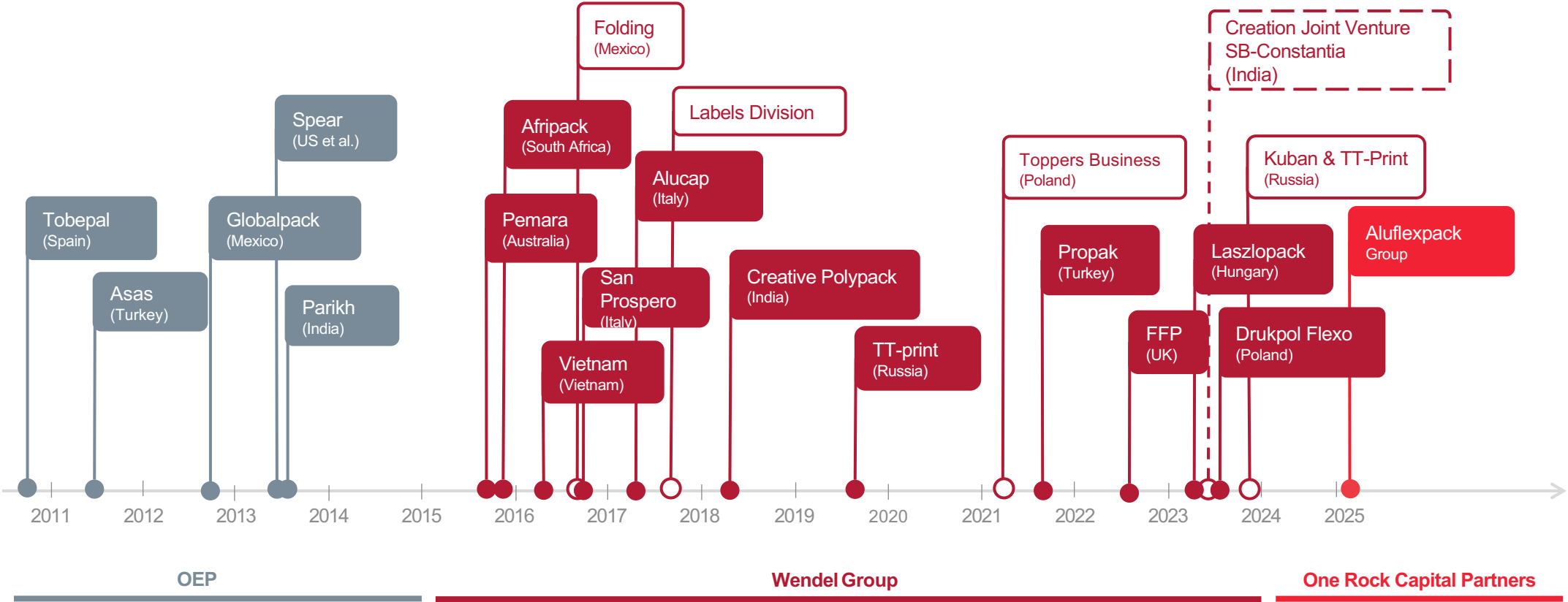
Food law compliance
Avoidance/reduction of volatile & migrating substances

We are growing strongly.

Our ambition for growth, together with our customers, is what keeps us going the extra mile every day. Through both organic development and strategic acquisitions, we aim for short to long term growth.



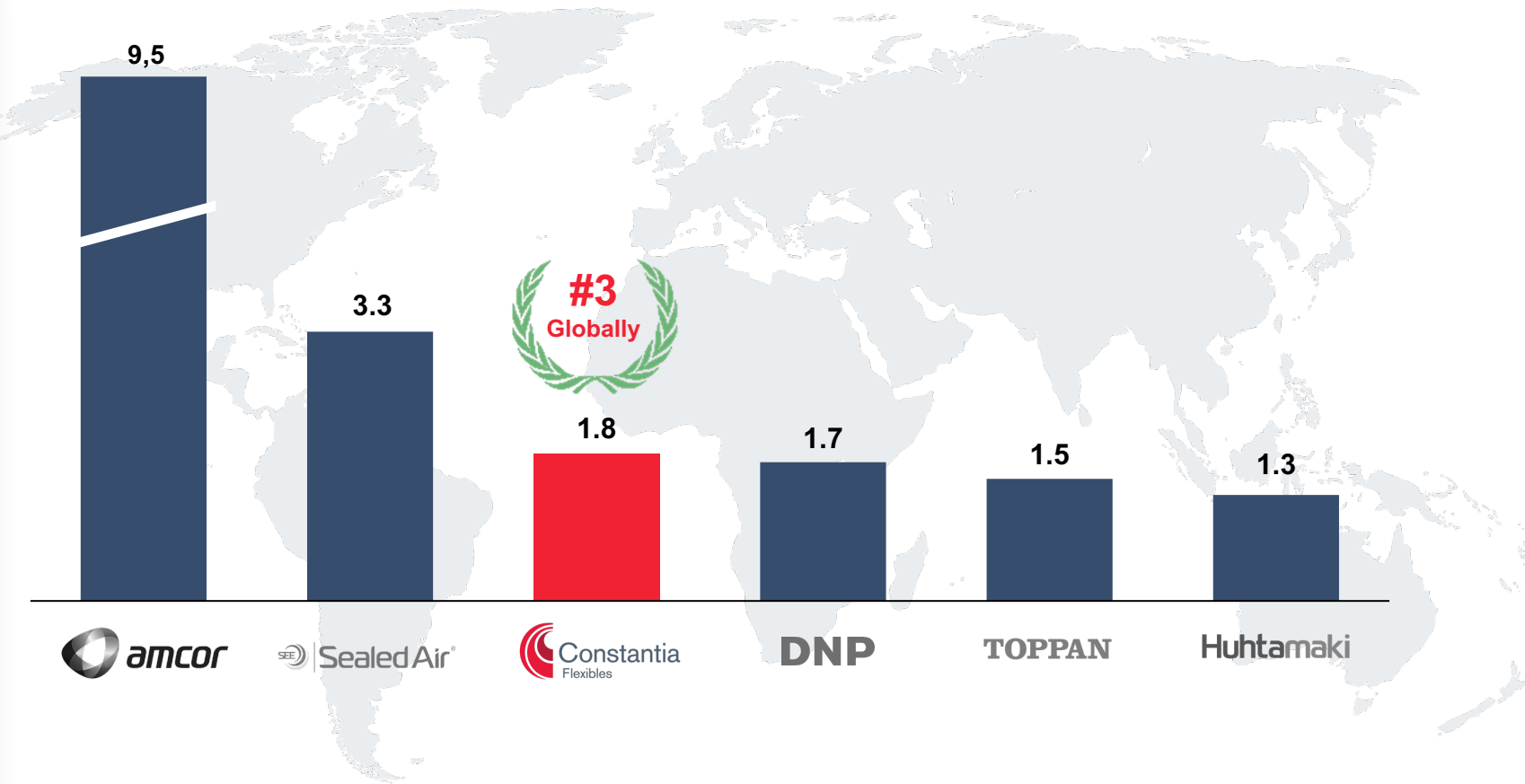
Strong track record of M&A



Competitor overview

Top flexible packaging players globally, revenue (EUR bn).

Information herewith stands for converted flexibles only; tertiary & secondary flexibles as well as industrial applications are excluded. Data for the financial year 2024.



Sustainability

We envision a world in which packaging provides people with the highest benefit at the lowest impact on the environment.



Our ESG roadmap commitments



Constantia Flexibles communicated complete ESG roadmap for the first time in 2021, including our commitments to:

- **Health and safety**
- **Climate change**
- **Circular economy**
- **Social and Governance**

(value chain collaboration, talent attraction & development, health & safety of consumers, diversity)



Our 360° Ecolutions approach

We believe every material has value. The key is selecting the right one for each application to **protect the contents effectively.**

Our priority is to promote **circularity and design for recycling.**

Therefore, we offer **packaging solutions from various materials**, not just one.



Experienced people with passion for packaging



Culture & respect

- Diversity and equal opportunities
- Three core competencies: Driving customer value, fostering collaboration, passion for results
- Full commitment to Global Ethical standards SEDEX, etc.,



Learning & development

- Global Training Toolbox for all employees, focusing on hard and soft skills
- Sales Academy to broaden skills of a salesforce
- Executive Leadership Program for managers
- Finance Academy for non-finance professionals
- Operational Excellence Center for all employees driving for lean six sigma know-how



Rewards & benefits

- Compensation philosophy based on individual performance
- Subsidized canteens, gym membership, commuting to work
- Team events
- Medical care (e.g., company doctor, medical checks)

6

PRODUCTS



Consumer



Pharma



Ecolutions*



EcoLam Family

Complete portfolio of mono PE laminates to replace nearly all conventional and non-recyclable structures in flexible packaging, even for the most demanding products.



EcoVer Family

Mono PP laminate applicable in a broad variety of packaging applications, designed for recycling, various barrier levels available.



EcoPaper Family

A range of mono-paper packaging solutions designed to meet modern packaging needs with varying barrier properties.



Beverages*



Aluminum Capsule Systems

Small, aluminum-based portion packs for liquids, gels, powders. Offer the best barrier and processing properties.



Lidding Reel Fed Beverages

Lacquered or coex-coated aluminum for closing PP, PE, and PBT-based coffee capsules. We ensure lids meet customer specifications with innovative solutions.



Coffee Packaging

Specially developed multi-layers for all kinds of packaging formats like pouches, stickpacks, and sachets.



**WE'VE
GOT THIS
COVERED.**

Confectionery*



Seasonal Wraps

Produced of printed or lacquered aluminum foil with a thickness of 9 - 20 μ , can be used for deep draw applications.



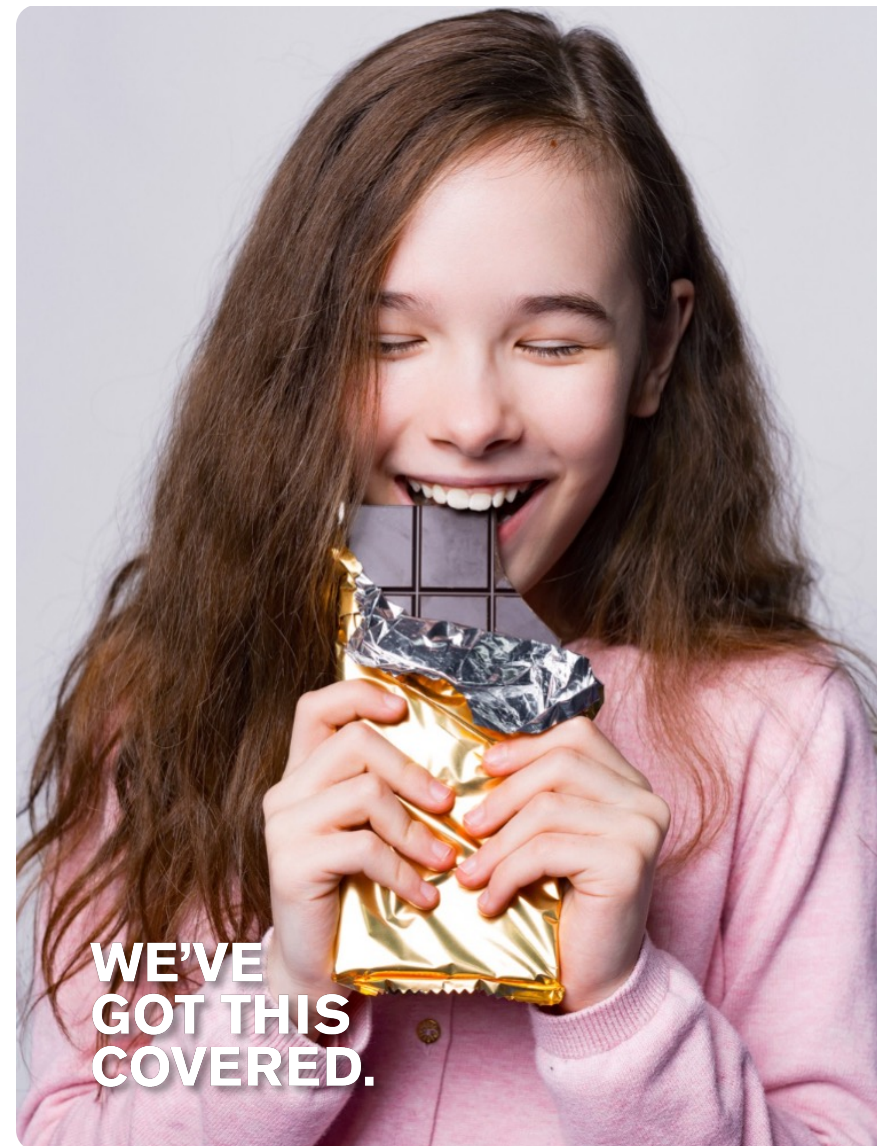
Tablet Foil

Classic chocolate bar wrapper with aluminum. It can be produced lacquered, unlacquered, embossed or unembossed.



EcoAluLam

Duplex aluminum structure with unique folding properties to replace multi-material structures.



Dairy*



ComforLid

A double-layer die-cut lid with aluminum and coextrusion sealing layer. The aluminum layer peels off, leaving the laser-cut plastic layer on the cup. Seals on PP-cups.



EcoPeelCover

The more environmentally-friendly lid. It is fully recyclable and has high barrier properties, thus can be used in various application areas.



WashOffBanderole

WashOffBanderole makes rigid containers recyclable by washing off during the recycling process and eliminating contaminants.



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COVERED.**

Home & Personal Care*



Promotional Sachet

High/medium barrier for personal care and hygiene products.



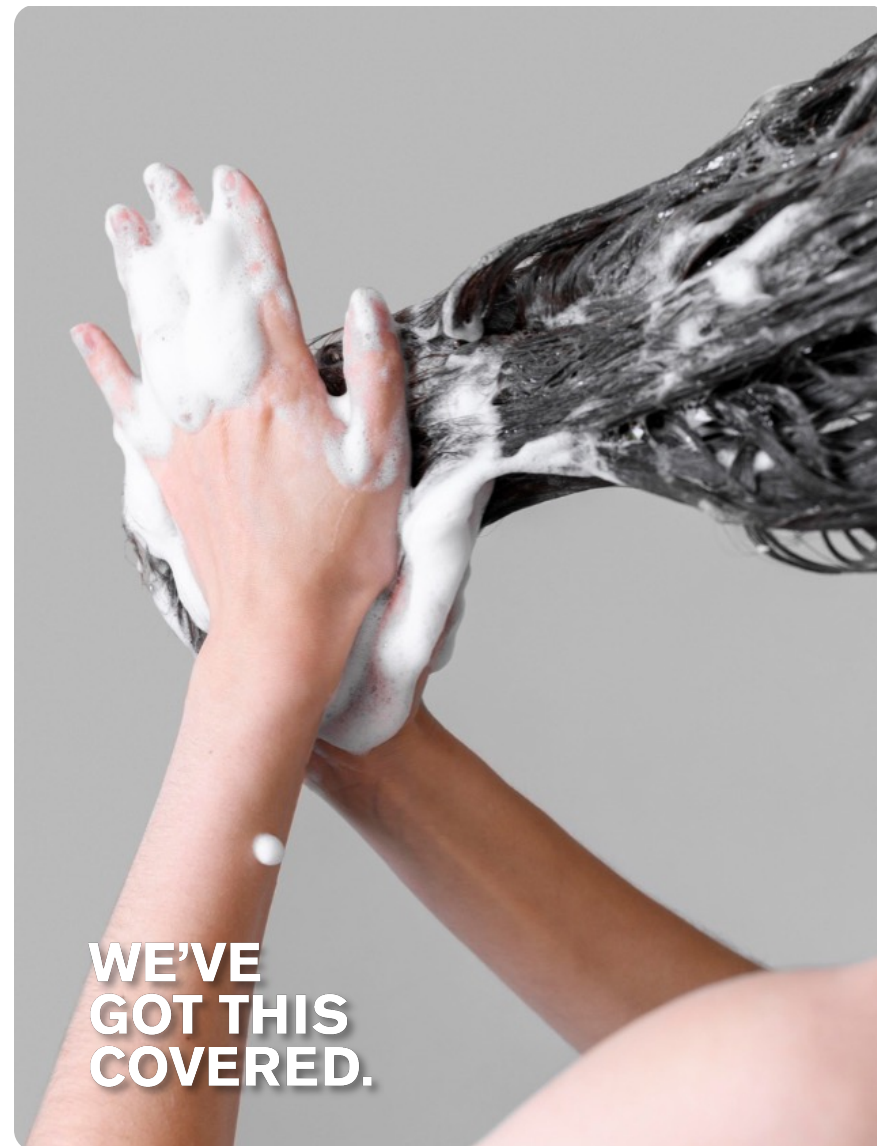
SoapWrap

Reliable quality packaging for soap blocks, offering suitable protection – mono-material available.



Water soluble film

Printed, water soluble PVOH packaging film suitable for liquids and powders for (typically) laundry and dishwash applications (pods, capsules, tablets)



**WE'VE
GOT THIS
COVERED.**

Processed Food*



DryFoodPouch

Special developed multi layers for all kinds of packaging formats: pouch, doypack, sachet, etc.



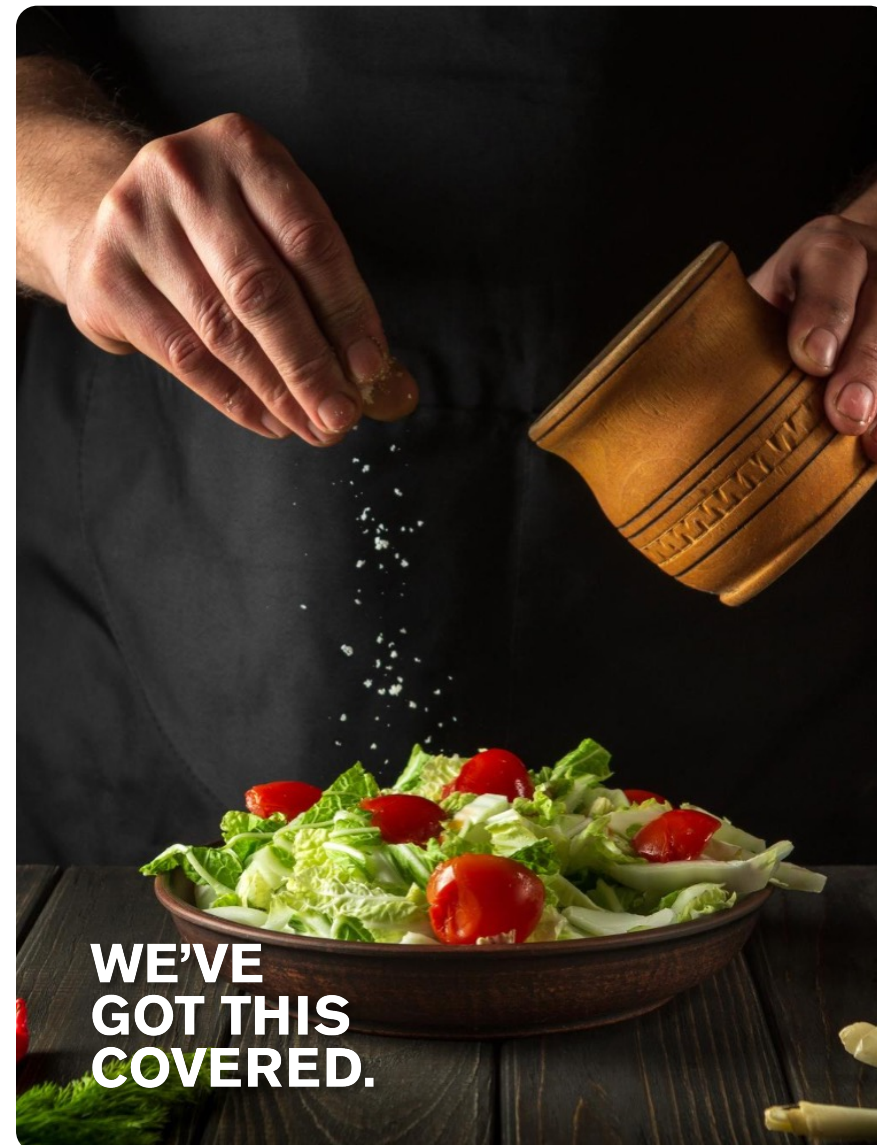
StickPack

Perfect laminates for liquid or dry products. Duplex or triplex materials are adapted to the filling and to customer request.



CubeFoil

Aluminum laminates with film or paper, to form folded or sealed cubes. Lacquered, printed or embossed available.



Technical Films & Foils*



EcoVerHighPlus for sealant packaging

EcoVerHighPlus Technical Films achieved 95% recyclability in Cyclos tests (unprinted version).



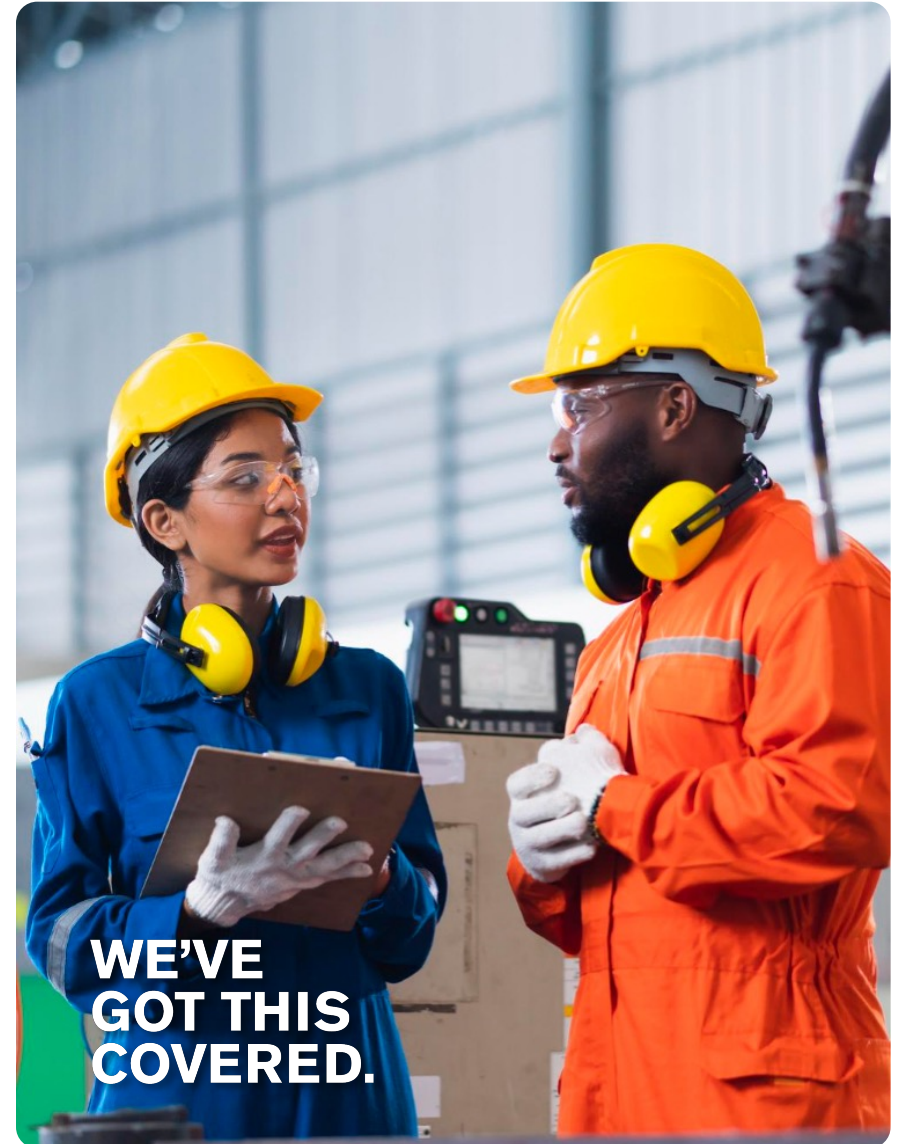
High performance laminates

Laminates with excellent processing, high puncture resistance, strong barrier properties, and pinhole-free sealing.



Technical Foils

Foil composites for construction, cables, and automotive.



**WE'VE
GOT THIS
COVERED.**

Pharma products

**LET'S SAVE
LIVES TOGETHER.**

COVERS

This product group comprises a range of **LIDDING FOILS** designed to cover different base web solutions such as blisters for medicines or trays for medical devices.



CARRIERS

All the products in this group are **COLDFORM FOILS** for various base web solutions that are used to carry various medications.



CASES

All our **LAMINATES** used as casing for medicines or medical devices are included in this product group.



Lidding foils



LET'S SAVE
LIVES TOGETHER.

COVERS

This product group comprises a range of **LIDDING FOILS** designed to cover different base web solutions such as blisters for medicines or trays for medical devices.



NORMA

High performance lidding foils for pharmaceutical blister packaging.



PURA

Pharmaceutical lidding foil for contact lens packaging.




Coldform foils



CARRIERS

All the products in this group are **COLDFORM FOILS** for various base web solutions that are used to carry various medications.






REGULA

Coldforming foil for total barrier blisters.



REGULA CIRC

The 100% barrier coldform foil, designed for recycling.



REGULA ARIDA

Coldforming foil for total barrier blisters with desiccant feature.

LET'S SAVE LIVES TOGETHER.



Laminates



LET'S SAVE
LIVES TOGETHER.

CASES

All our **LAMINATES** used as casing for medicines or medical devices are included in this product group.



NEXA

Packaging film for pharmaceutical purposes.



PERPETUA ALTA

The first High Chemical Resistant, recyclable mono-PP laminate.



SECURA

Aluminum container for sensitive medical devices.



NEXA ARIDA

Laminate for total barrier casings with desiccant feature.



PERPETUA

High barrier full PP laminates built for recycling and longevity in the value chain.



Safety features



CHILD-RESISTANT FEATURES

Pharmaceuticals can cause severe harm if accessed by children. We offer various child-resistant solutions with **different opening features to prevent accidental harm** and save lives.



APERTA

Patented TOF technology to perforate the PET layer.



DUO

Two steps to: First separate the cavity and then peel off the paper.



FLECTA

Separate the cavity from the blister, tear along the perforated line to access.



LUX

Laser perforating mechanism for child-resistant/senior-friendly feature.



TRIA

Three steps to: Separate the cavity, peel off the paper, and push through the product.



FORTE

Higher pressure is needed to press the product through the lidding foil.



Security features



LET'S SAVE LIVES TOGETHER.

ANTI-COUNTERFEITING FEATURES

Pharmaceuticals can cause severe harm if accessed by children. We offer various child-resistant solutions with **different opening features to prevent accidental harm** and save lives.



ORIGA

This tamper evident peelable lidding foil is damaged during opening and cannot be restored.



GRAPHICA

Ensures a high level of security by using complex graphical elements.



COLORA

A high-level security feature with unique optical effects.



INTRA

An integrated security feature with a special design inside the foil.



People Passion Packaging

