

Carton Solutions for Tomato^{///} Evolution

Unpacking the
latest trends





Paolo Volpari

Head of Marketing Europe
SIG Group



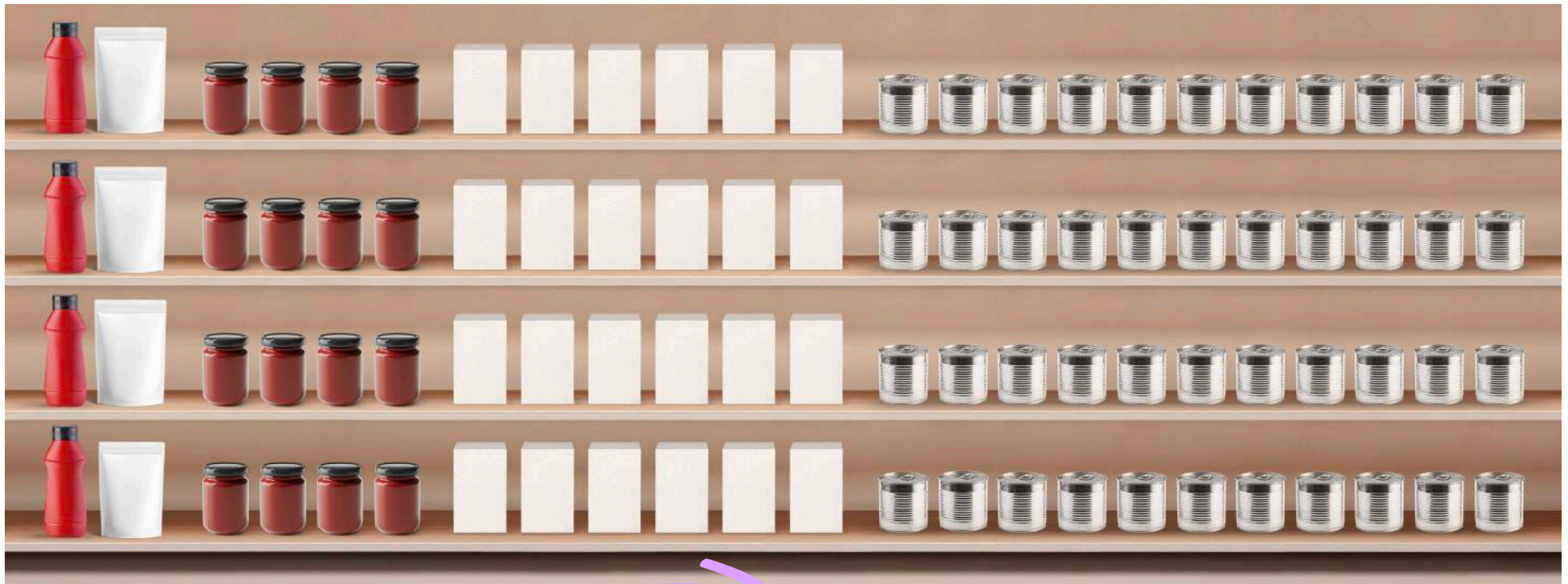
Tomato packaging today



Tomato shelves are changing

Market share FY22; change over past 10 years

Traditional packaging is losing share!



Others:
9 %
market share
+0.5 pp

Glass:
17 %
market share
-0.7 pp

Carton:
27 %
market share
+3.4 pp

Cans:
47 %
market share
-3.2 pp

Source: Euromonitor, Tomato tastes & puree + Shelf stable tomatoes; in number of packs

Carton packaging surges all over EU

And already leads in numerous markets

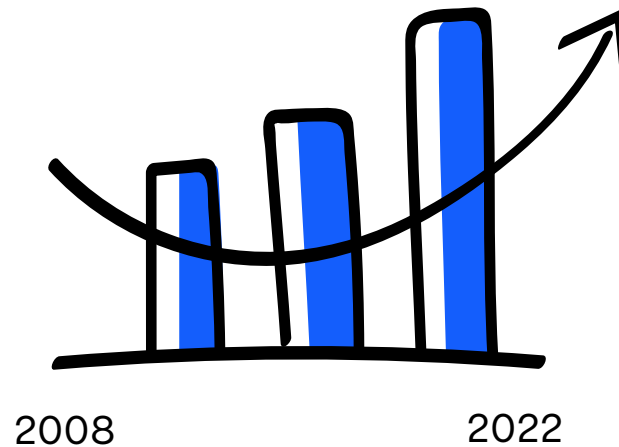


1,4 bln

Cartons in 2022

+ 43 %


vs 2008




Carton share by country

 Greece
87%

 Spain
55%

 Germany
54%

 Scandinavia
45%



What's behind carton growth?

Unique carton pack
properties



Unique carton pack properties



Light Weight

At least 3x lighter vs metal cans

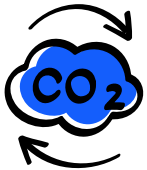


Unique carton pack properties



Light Weight

At least 3x lighter vs metal cans



Sustainable

Lower carbon footprint,
>75% renewable



Unique carton pack properties



Light Weight

At least 3x lighter vs metal cans



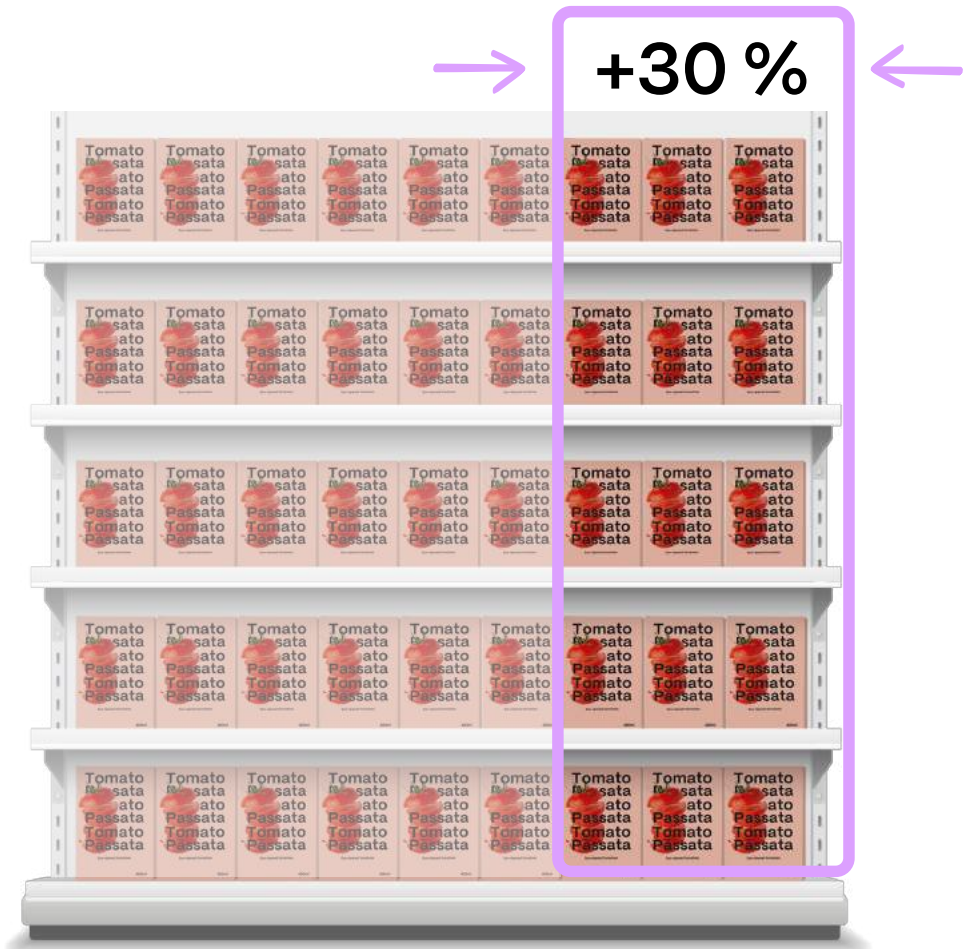
Sustainable

Lower carbon footprint,
>75% renewable



Optimal Shape

Easy to store, use, dispose and 30%
more packs in shelf utilization



Unique carton pack properties



Light Weight

At least 3x lighter vs metal cans



Sustainable

Lower carbon footprint,
>75% renewable



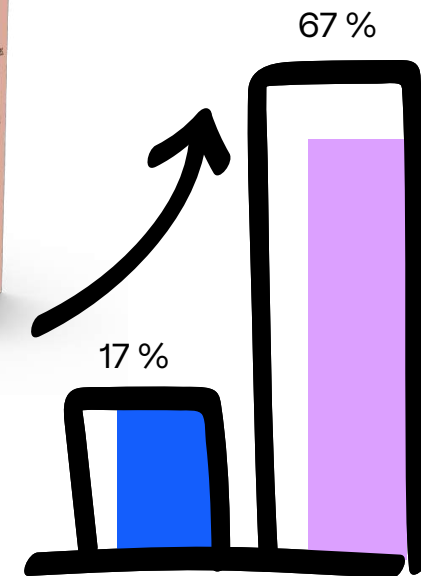
Optimal Shape

Easy to store, use, dispose and 30%
more packs in shelf utilization



Purchase intent

Consumers' acceptance indicated
high growth potential



■ Carton as the most often pack

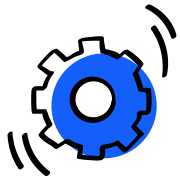
■ Purchase intent

What's behind carton growth?

Unmatching advantages
of aseptic technology



Unmatching advantages of aseptic technology



Lean production

Less space.
Less utilities consumption and waste



Unmatching advantages of aseptic technology



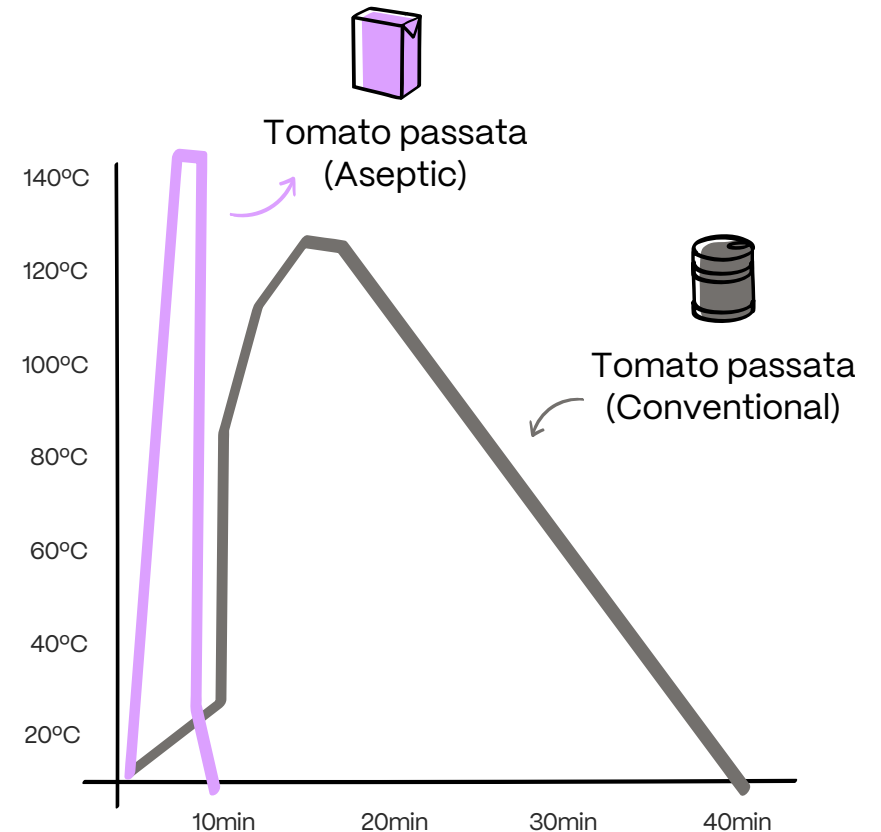
Lean production

Less space.
Less utilities consumption and waste



Better product treatment

Much shorter sterilization time



Unmatching advantages of aseptic technology



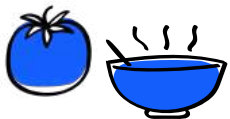
Lean production

Less space.
Less utilities consumption and waste



Better product treatment

Much shorter sterilization time



Wide range of recipes

Chunks, fibers, high viscosity...
filling made easy

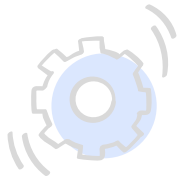


up to:

- ☆ 25mm cubes
- ☆ 40mm fibers/pieces
- ☆ 50 % solid cont.
- ☆ 5,000 mPas/cps



Unmatching advantages of aseptic technology



Lean production

Less space.
Less utilities consumption and waste



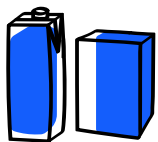
Better product treatment

Much shorter sterilization time



Wide range of recipes

Chunks, fibers, high viscosity...
filling made easy



Flexibility of volumes & shapes

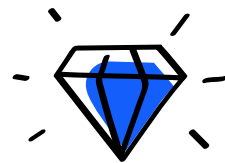
From 125ml to 2,000ml



**What's next
in carton
packaging for
tomato?**



Consumer needs are evolving and set the tone ...



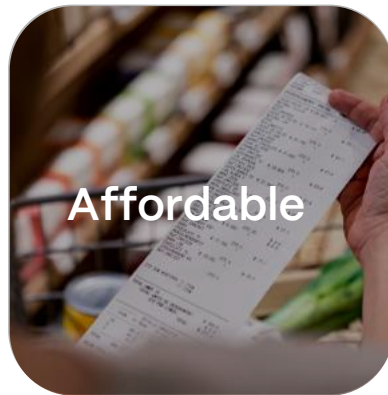
Levers for innovation / premiumization

... and carton packaging is a cutting-edge solution for future



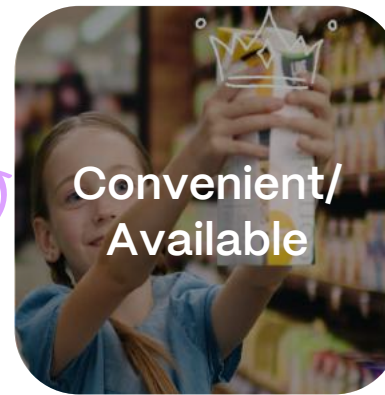
Healthy

and



Affordable

and



Convenient/
Available

and



Better for
the planet

- ☆ Preservation of food freshness and quality thanks to aseptic technology

- ☆ High efficiency of aseptic filling lines that helps to deliver affordability for consumer

- ☆ Light, easy to hold, carry, store & disposal
- ☆ High and growing consumers' acceptance & distribution across EU

- ☆ More sustainable pack by its nature
- ☆ The lowest carbon footprint pack solution
- ☆ Designed for recycling



SIG is on a journey to create the perfect packaging!

Our vision of packaging for better



Taking out aluminum layer



Remove more carbon from the atmosphere than is emitted during its lifecycle



Be entirely made from endlessly renewable or recycled materials



And be fully and easily recyclable – anywhere in the world

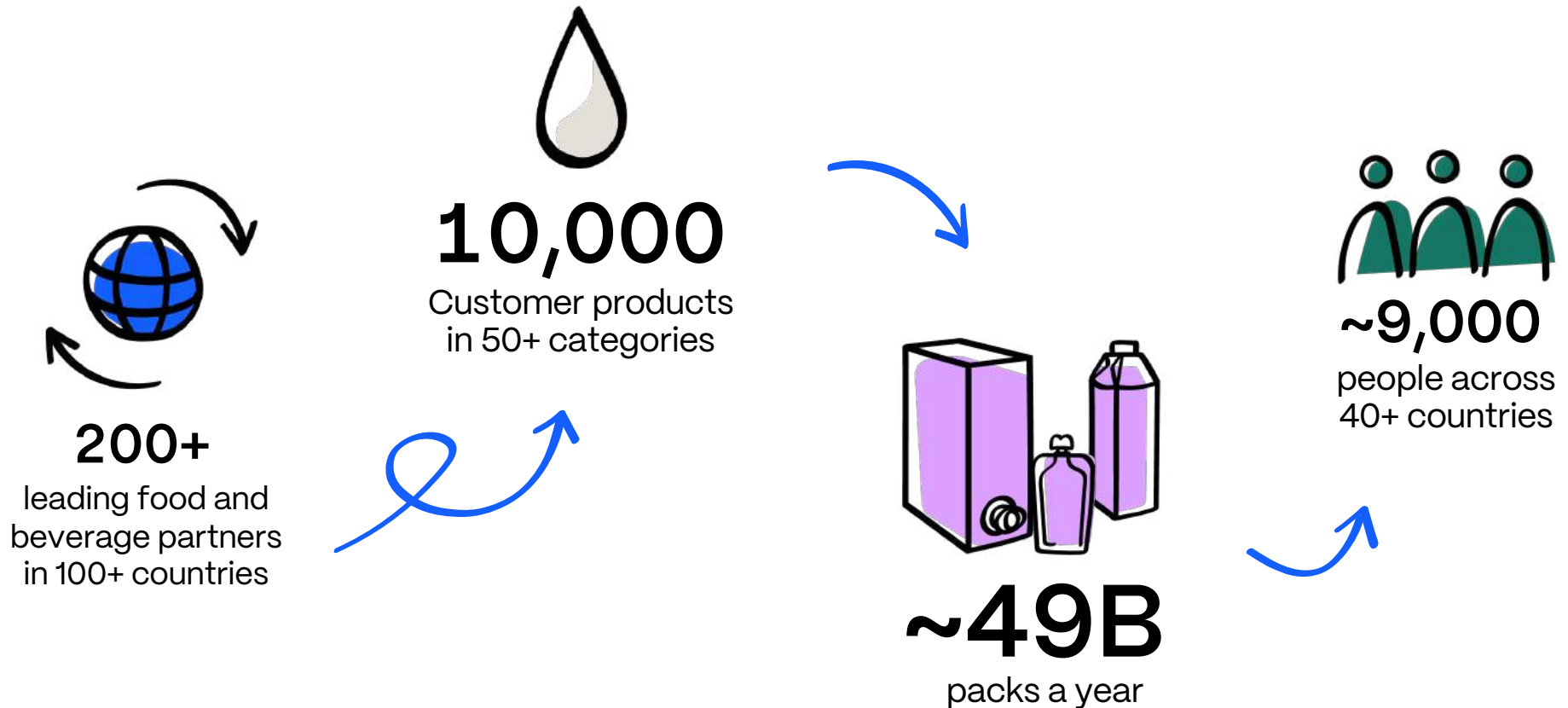
+85% fiber content with full barrier by 2025

As interim step to +90% by 2030



SIG is your trusted expert packaging system supplier

With full portfolio for tomato industry



SIG is your trusted expert packaging system supplier

Working with leading names in food industry





for better

Paolo Volpari

Head of Marketing Europe
SIG Group

Paolo.Volpari@sig.biz

www.sig.biz