Amcor Australasia - Glass
Brian Lowe, Vice President & General Manager Beverages

Attractive market segment
- Industry fundamentals
  - Good industry structure
  - High barrier to entry
  - Deep customer relationships
  - High A$ impact absorbed

Amcor
- Low cost producer
- Well capitalised assets
- Strong customer support

Strong business generating significant cash
Glass - business overview

Key Facts and Figures (FY 2012)

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<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Sales (m units)</td>
<td>741</td>
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<tr>
<td>Co-workers</td>
<td>285</td>
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<tr>
<td>Customers</td>
<td>50+</td>
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Key Markets & Segments

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<tbody>
<tr>
<td>Alcoholic beverages</td>
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<td>Non Alcoholic beverages</td>
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Capabilities and Technologies

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<tbody>
<tr>
<td>Glass</td>
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<tr>
<td>Fully integrated supplier of glass</td>
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<tr>
<td>Wine packaging</td>
<td></td>
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<td>Beer &amp; CSD packaging</td>
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<tr>
<td>Globally sourced glass offerings</td>
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Capital Investments

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<tr>
<td>New glass bottle making technology</td>
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<tr>
<td>(Press and Blow method)</td>
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<tr>
<td>Short run manufacturing capability</td>
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Glass - Segments & Market Share

Wine
- Amcor
- OI
- Import

Beer
- Amcor
- OI
- Import

Strong position in wine end markets and a strong niche position in beer

Glass – Industry wine volumes

Source: Wine Australia

- Domestic
- Export
Glass - Gawler Plant Key Facts

- Commissioned May 2002
  - Capital investment approx $450m
  - Beverage market focus

- Today
  - 290 staff
  - 3 furnaces – 400,000 tonnes per year in total
  - 7 colors
  - 36,000 + 36,000 sqm2 of warehousing
  - 70% wine focus equating to approximately 50% of the Australia wine market

Glass - Innovation

Light weighting
- As many of our customers have looked to bulk shipping wine we have looked to reduce their costs for our bottles through two different streams
  - Re-engineering existing bottles with very similar dimensions however reducing the weight
    - Weight reductions have been up to 20% in glass
    - No implications for customer line set-up or cartons
    - 52% of wine bottle sales are through re-engineered bottles
  - Narrow neck Press & Blow technology
    - Lighter weight bottles through production process
    - Lightest possible bottles different dimensions different
    - 6% of wine bottles sales (but growing)

Swirl bottle
- A unique ‘twist’ on conventional bottle design
- Internally embossed to allow standard labeling

A new take on glass embossing

Looking to differentiate your wine brand?
Amcor has recently developed a range of innovative wine packaging technologies. By using embossed glass bottles, customers can create an elevated image to their wine, adding an extra dimension to the wine offering and the consumer experience. This new product will change the nature of glass embossments.
Attractive market segment
- Industry fundamentals
  - Improving industry structure
  - Proprietary design and J.I.T demand structure creates barrier to entry
  - Deep customer relationships

Amcor
- Strong branding (Stelvin\textsuperscript{®} range)
- Innovation leader
- Strong customer support

Strong business generating significant cash
Wine Closures - business overview

Key Facts and Figures (FY 2012)

<table>
<thead>
<tr>
<th>Category</th>
<th>FY 2012</th>
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<tr>
<td>Sales (m units)</td>
<td>321</td>
</tr>
<tr>
<td>Co-Workers</td>
<td>108</td>
</tr>
<tr>
<td>Customers</td>
<td>100+</td>
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Key Market

- Wine

Capabilities and Technologies

- Amcor acquired Alcan Packaging in 2010 including the Dudley Park Stelvin business giving access to the Stelvin product range.
- Amcor Closures offers a full service solution (closures, capping equipment & technical expertise).

Capital Investments

- Upgrade in metal decoration with UV capability

Wine Closures - Volumes

- Graph showing the percentage of different closure types from 2003/04 to 2011/12.
  - Cork Mouth
  - Screw Cap
Wine Closures - Dudley Park Plant Key Facts

- Commissioned July 2006
  - 9 Lines
  - Exclusive Stelvin® & Stelvin® Lux manufacturing technology
- Today
  - 108 staff
  - 500m units capacity per annum
  - Specialised printing

Wine Closures - Innovation

**QR Codes**
- Features
  - A specific matrix barcode that is readable by QR readers / Smartphone’s.
  - Barcode triggers text, open a URL or link to other data.
- Benefits
  - Easy and self explanatory to use.
  - Creates direct engagement with the consumer.

**UV Orientation**
- Features
  - Invisible UV spot on the outside of the screw cap allowing for perfect alignment.
- Benefits
  - Perfectly presents the product to the customer through aligning cap with label.
  - Artwork on the cap can be integrated into the design of the label.
Wine Closures – Value Proposition

Security inks

- Features
  - Special luminescent properties are mixed with the inks used in the overcap.

- Benefits
  - Easily integrated into product packaging.
  - Diverse print format options.
  - Simple counterfeit identification.

HoloCap

- Features
  - Hologram printed on to the tin over cap tear-off strip.

- Benefits
  - Anti-counterfeiting system replacing transparent sleeve.
  - Visual guarantee for end-consumers that the product is authentic.

Stelvin® P

- Features
  - Utilising a unique liner designed for use on standard application equipment.
  - Tin liner providing the same barrier to oxygen as the standard tin saran liner

- Benefits
  - Convenient, Neutral, resealable, gas retention
  - Ideal for products with up to 6 bar

Stelvin® D

- Features
  - Adding a de-bossed feature to the Stelvin range
  - Available across all the range of products

- Benefits
  - Quality tactile alternative to embossing
Wine Closures – Video

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Aspiring to new heights