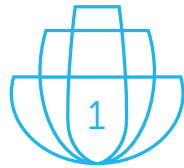


## CORPORATE PRESS



Innovative glass for a better world



## Arc Group, the global leader in tableware

7,000  
employees

4,1 M  
items  
produced every day

4  
production sites  
worldwide

160  
present in  
over 160 countries

12  
patent applications  
each year

€900 M  
revenue  
in 2022

€74 M  
invested  
in 2022

### Arc's Governance

Nick Hodler, *Group & Europe CEO and member of the Board of Directors*

Eric Trupin, *Group & Europe CFO/CIO*

Joël Corcessin, *Group General Counsel*

Xavier Ibled, *Group VP Innovation*

Grégoire Nollet, *Group VP Engineering*

Gwenaëlle L'Hénoret, *Group VP Sales and Marketing*

Jean-François Decroocq, *Group & Europe VP Operational Excellence*

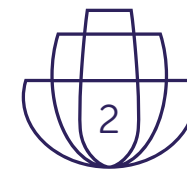
Dean Kimber, *Americas CEO*

Nicolas Motte, *Africa-Middle East CEO*

Bharat Bhushan, *Asia-Pacific CEO*







## Arc, two centuries of expertise and innovation

Founded in 1825 in the heart of Arques in northern France, Arc is the global leader in tableware. For nearly two centuries, the Group's story has been forged by countless innovations, with the same enthusiasm throughout the years: bringing fascination back into daily life for countless people by offering more beautiful, practical, resistant, versatile, health-conscious, and accessible products over the years.

Beginning in 1930, Arc began building its first tank furnaces and installed its first presses. The first glassblowing machines appeared in 1948. Opal glass and shock-resistant glass emerged in 1958. Then, automated stemmed glass manufacturing began in 1960.

Ten years later, the company was at the height of its craft when it developed the world's first mechanical crystal production. It was a veritable revolution that made crystal accessible to all, challenging the status quo.

Since then, the Group's R&D department has not stopped innovating. They developed new types of glass, including Krysta®, an extra-strong lead-free crystalline as sparkling and resonant as crystal, colored opal or culinary opal: voted 2019 Product of the Year.

Over the course of these innovations, Arc has developed new brands that have been a constant presence in the daily lives of people all over the world for several generations: Luminarc®, Arcopal™ and Cristal d'Arques® Paris for the general public, and Arcoroc® and Chef&Sommelier® for professionals.

The Group adapts its collections to local trends and optimizes its logistics in order to offer them at the best price everywhere. Designers, marketing teams, and R&D combine experience with market needs in order to exceed consumers' expectations, developing new concepts, renewing collections, and creating new forms.

Today, the Arc Group's production capacity has reached 4,1 million glassware items per day thanks to its production sites in France, China, the United Arab Emirates and the United States.

French production makes up approximately 50% of global sales revenue. At the end of 2019, 200 collections produced at the Arques site received the Origine France Garantie (Guaranteed French Origin) certification. Certification was renewed in 2022.





## A Group undergoing profound transformations

Several years ago, the Arc Group began a dramatic transformation that was simultaneously human, technological, and financial.

On the human front, the Arc Group had to meet the challenge of ensuring its knowledge transfer. With an average employee age of over 47 and the prospect of many upcoming retirements, the company had to hire and train several hundred people, in order to ensure that the knowledge of existing employees would be transmitted to newer employees, thereby conserving precious expertise. The Arques site is the 8th industrial site in France in terms of jobs.

On the technological front, the Group was facing an equally important challenge: the transformation of its production equipment, designed to meet improved working conditions and safety requirements, while increasing capacity, agility, and profitability. Arc launched a new wave of modernization in 2019. This equipment evolution will continue for several years.

These changes mobilize significant financial resources: in 2021, the Arc group invested €74 million, including €5.7 million in Research & Development.







## Our markets

The Arc Group is present in a wide range of markets:

- Tabletop (glasses, stemmed glasses, carafes, plates, small bowls, hot beverage glassware, mixing bowls, etc.)
- Food storage containers (lunch boxes, bulk purchase and take-out containers, etc.)
- Bakeware/Ovenware (baking dishes, pie pans, ramekins, pots etc.)
- Containers for the agro-food industry (mustard/condiment jars, pickle jars, etc.)
- Custom-made solutions for professionals and manufacturers (candle jars, beer mugs, personalized and promotions items, etc.)
- Accessories (vases, ashtrays, pitchers, jugs, butter dishes, jam jars, etc.)

Because of the span of its products, the Arc Group reaches a wide variety of target audiences:

- End consumers through its own web sites, Ecommerce and retail shops
- Mass retail (food and non-food)
- Selective retail
- Wine merchants
- Hotels
- Restaurants
- Bars and cafés
- Institutional (schools, hospitals, retirement homes, company cafeterias)
- Manufacturers and suppliers of finished and semi-finished products
- Marketing services (advertising, premium/gift and loyalty programs)
- ECommerce

The Arc Group supplies a large number of iconic brands, including Coca-Cola and McDonald's, as well as major international hotel chains such as Accor, Hilton, and Radisson.

1. Chef&Sommelier® decanter and Open Up Universal Tasting stemware
2. Luminarc® Diwali
3. Chef&Sommelier® Nectar
4. Luminarc® colored and marbled opal
5. Coca-Cola





Luminarc®

Brand for the general public

#### Feel Creative

Simple, stylish, and smart, Luminarc® collections invite creativity to the table on a daily basis. Truly French in its style and its art of living, the brand marries colors and shapes with truly stylish and simple glassware and dishware for everyday use, and offers smart collections of versatile products from the kitchen to the table. Both stylish and convenient, they are a beautiful way to drink, cook, eat, and share special moments at home or wherever you may go. It is the Group's first brand and is available in more than 160 countries, offering products adapted to local usage and customs.

Luminarc maintains the greatest sales revenues for the Group.

#### Iconic collections

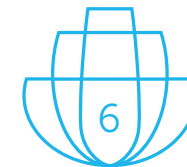
- Guingette glassware
- Diwali tableware white, black and colored opal
- Vache butter dish
- Pure box active storage box
- Carine cookware dish (Smart Cuisine)

#### Novelties

- Pure Jar jams for bulk
- Smart Cuisine cookware dishes
- Diwali tableware light blue, turquoise, granite
- Easy Box 250° / Pure Box active
- Le verre français

**Luminarc**





Cristal d'Arques® Paris

Brand for the general public

#### Casual Elegance

Cristal d'Arques® Paris is an elegant brand, inspired by French Art of living. A brand mixing Tradition & Modernity, imprint of Arc glassmaking know how.

A premium brand at affordable price, for consumers who love to celebrate, receive and set beautiful tables.

#### Iconic collection

- Macassar







Arcoroc®

Brand for professionals

#### Everyday Proof since 1958

Arcoroc® is a line of global tableware art solutions that are innovative and functional, designed for intensive use in the restaurant industry. The Arcoroc® collections anticipate professionals' needs and work closely and efficiently with professionals' creativity and their desire to satisfy their clients.

An ongoing quest for complete and high-performance solutions allow Arcoroc® to be the privileged partner of the most prominent hotel chains, restaurants, and bars. Rigorous and passionate, the Arcoroc® teams place innovation—both in design and in new usages—at the heart of their mission.

#### Iconic collections

- Gravity
- Islande
- Elegance
- Restaurant

#### Novelties

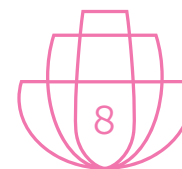
- Extension Broadway
- Brixton
- Nova Aquitania

ARCOROC

Arcoroc®  
Gastro'Cook







Chef&Sommelier®

Brand for professionals

#### Creator of experiences since 2008

Chef&Sommelier® embodies elegance, expertise, and innovation, serving the hotel, restaurant, and wine tasting industries. The brand celebrates the French “art de vivre”, offering professionals global solutions in tableware, dishware, glassware, and cutlery.

The product of an art of living that is anchored in the richness of French gastronomy and oenology, Chef&Sommelier® designs versatile dinnerware, glassware, and cutlery collections using pure and elegant lines.

Chef&Sommelier® creations are part of the world of innovation, the world of professionals who seek to transcend their expertise, awaken their senses, and create unforgettable experiences and tastings. Here, more than anywhere else, passion and high standards remain the guiding principles, leaving space for joy, creativity, and shared discoveries.

Chef&Sommelier® works in partnership with the International Sommelier Association (*l'Association de la Sommellerie Internationale* [ASI]) and the Cité du Vin in Bordeaux.

#### Iconic collections

- Open'Up
- Cabernet
- Primary

#### Novelties

- Exaltation
- Vin au verre Cabernet







## Guaranteeing food safety

Glass, by its very nature, presents key advantages in terms of food safety: it is an inert material that does not leech into food. It does not transmit flavors or odors and preserves the vitamins in the foods that it contains.

Microwave cooking or reheating in glass containers does not cause any interaction with food, making glass a trusted material for consumers.

The Arc Group is constantly innovating in order to guarantee the most stringent food safety possible.

In 2010, the Group ceased all lead crystal production. Today, the Arc glassware collections in the premium segment are made from Krysta®, a perfectly transparent crystalline that is able to preserve the sonority of true crystal.

More recently, in 2018, the Group achieved a new accomplishment by offering self-colored opal glass dishware. Glassware manufacturers have never before been able to create opal dishware using such bright colors. As for the last 20 years, all decor from the collections sold under the Group's brands has been manufactured without lead.

The *Smart Cuisine* culinary collection, created in 2018, was voted Product of the Year in France in 2019. The collection is made of culinary opal which is 30% lighter than traditional materials used for baking dishes. Also three times more resistant to shocks than porcelain, it is easy to switch from the oven to the table.







## Environment

The Arc Group's social commitment didn't begin yesterday—since 2003, the Group has committed to adhering to the UN Global Compact Program.

Insulating, fireproof, resistant and infinitely recyclable, glass is a sustainable material by its very definition. The Arc Group has long been aware of environmental issues, and for many years has been committed to an approach that favors a circular economy, endeavoring to preserve natural resources and integrate sustainability criteria into the design of its products and offers.

Consumers are becoming increasingly sensitive to the issue of unrecyclable waste. Using glass containers offers a real alternative to difficult-to-recycle materials. Glass storage containers represent now about 25% of storage containers in the market, whereas 10 years ago, plastic was omnipresent.

As of January 1st, 2020, selling disposable tableware was prohibited in France. Confident that glass is the new preferred material, Arc launched a new collection in 2020 designed to replace plastic containers. Practical, lightweight and ergonomic, the Easy Box 250° Luminarc® glass storage containers can go directly from cold (refrigerator or freezer) to hot (traditional oven or microwave). This line received the 2020 German Design Award.

Arc is also expanding this sustainable approach to its food service and retail sectors. This Arc Group initiative does not apply only to plastic, but to cardboard as well. As more and more brands are offering products in bulk, Arc developed a new line of glass storage jars in 2020 called Pure Jar Luminarc®. The jars are glass and the lids are made from cork and wood.

The Group has reduced its CO<sub>2</sub> emissions by more than 23% per tonne of glass produced between 2010 and 2022.





## Global presence

A world leader in its business, the Arc group is present in many regions of the world, through its production sites, its distribution subsidiaries and its liaison offices. This global presence allows the Group to adapt its offer to the uses and expectations of consumers, while limiting transport and logistics costs.

### Production sites

France (Arques, Hauts-de-France)

United States (Millville, New Jersey)

China (Nanjing, Jiangsu Province)

United Arab Emirates (Ras Al Khaimah)

### Distribution Subsidiaries

Australia

United-States

Italy

United-Kingdom

Singapor

Turkey







@Arc International



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**Innovative glass for a better world**

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