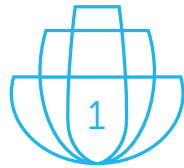


CORPORATE PRESS



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

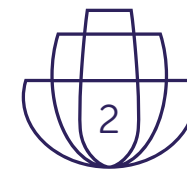
Jean-François Decroocq, Group & Europe VP Operational Excellence

Dean Kimber, Americas CEO

Gwenaëlle L'Hénoret, 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.

The group's R&D department has continued innovating ever since. They have developed new types of glass including Krysta®, an extra-strong, lead-free crystalline as sparkling and resonant as crystal, colored opal or culinary opal.

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.

In 2023, Arc's production capacity reached 4.1 million glassware articles per day, manufactured in the group's sites in France, China, the United Arab Emirates, and the US.

French production makes up approximately 50% of global sales revenue. Around 200 collections made on the Arques site received the «Origine France Garantie» in 2019 which has been renewed until 2026.

A tribute recognizing the expertise and excellent craftsmanship of Arc's glassmakers, as the group plans celebrations to mark its bicentenary in 2025.



A Group undergoing profound transformations

Arc had been undertaking far-reaching transformation at a human, technological, and financial level for several years when the global crisis hit in 2022. The shifting landscape obliged the group to review its strategy and put in emergency measures to ensure the continuity going forward.

The Arcadia plan was ready and launched by September 2022. It is probably one of the greatest challenges in Arc's history.

The entire Arc team is currently meeting major challenges, including producing efficiently with responsible methods, safeguarding profitability, proposing a product range that meets our customers' needs, and creating disruptive innovations for the market.

On the workforce front, Arc must renew a major proportion of its personnel with an average age of around 47. So many impending retirements means there will be a whole new generation of glassmakers to recruit and train. Expertise is a precious asset. A successful transfer of knowledge from the older generation to new employees is of capital importance. The Arques site is the eighth French industrial site for job numbers.

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. These last years, Arc launched a new wave of modernization. This equipment evolution will continue for several years.

These changes mobilize significant financial resources: in 2022, the Arc group invested €74 million, including €5 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.



Luminarc®

Brand for the general public

Simple, stylish and smart

Since its creation, Luminarc has created a range of stylish and practical tableware and cooking equipment. Reflecting current trends, the range is functional, durable, and affordable. Recognized for its quality, the Luminarc range offers tableware collection inspired by French hospitality and perfect for everyday use. The products are carefully designed to respect the environment.

Luminarc maintains the greatest sales revenues for the Group.

Iconic collections

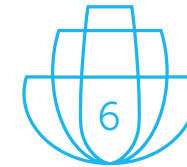
- Smart Cuisine
- Diwali tableware white, black and colored opal
- Vache butter dish
- Pure box active storage box
- Feston

Novelties

- Cottage
- Vicky
- Smart Cuisine Wavy
- Black Box

Luminarc





Cristal d'Arques® Paris

Brand for the general public

Simple French chic

A model of French expertise since 1968, Cristal d'Arques represents the essence of French lifestyle. With a lasting combination of tradition and modernity, an attachment for the elegant, premium brand reflecting French style has passed from generation to generation.

Cristal d'Arques makes every occasion unique. It's ideal for celebrations, receiving friends and family, and for creating beautiful table decorations.

Collection emblématique

- Longchamp
- Lady Diamond
- Macassar
- Rendez-vous

Nouveautés

- Swirly





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

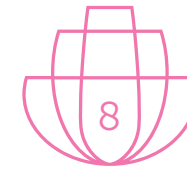
Novelties

- Extension Broadway
- Brixton
- Monti
- Silhouette
- Intensity White & Baril
- Spring
- So Urban

ARCOROC

Arcoroc®
Monti





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.

Iconic collections

- Open'Up
- Cabernet
- Primary

Novelties

- Symétrie
- Exaltation
- Evidence
- Champagne & Cocktail
- Absoluty





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

Glass is a sustainable material by nature: almost infinitely recyclable, insulating, nonflammable and durable. The Arc group's commitment to the environment began several years ago with the Arc Responsible 2030 plan based on two strategic themes: the circular economy and reducing our carbon footprint.

Consumers are increasingly sensitive to the issue of waste. Using glass containers is a genuine alternative to other materials which are more difficult to recycle. In line with the growing trend of unpackaged products, Arc began developing a new range of jars called Pure Jar Luminarc® in 2020. The jars are glass with a lid made of wood and cork.

Glass containers represent around 25% of storage containers on the market, whereas just ten years ago plastic was omnipresent. According to the 2023 AGEC law, fast food must no longer be served in single-use plastic for food and drinks served on site.

Convinced that glass is a serious alternative to single-use materials, in early 2020 Arc launched a new collection to replace disposable containers for the catering sector with the So Urban Arcoroc range. As well as products and their use, conscious of its impact on the environment, Arc aims to significantly reduce its carbon footprint. Between 2010 and 2022, the group reduced its CO2 emissions by 23% per tonne of glass produced.

The Arc Responsible 2030 plan is based on seven pillars:

- Development of new, more sustainable materials
- Eco-designed products
- Adapting to new consumption patterns
- Optimizing the entire supply chain
- The energy challenge
- The water challenge
- Recycling



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





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