



## Amcor Australasia - Glass

Brian Lowe, Vice President & General Manager  
Beverages

Aspiring to  
new heights

## Glass - Key messages

### 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



Glass



### Key Facts and Figures (FY 2012)

Sales (m units)	741
Co-workers	285
Customers	50+

### Key Markets & Segments

Alcoholic beverages	Wine and Beer
Non Alcoholic beverages	CSD's & Cordial

### Capabilities and Technologies

Three furnaces
Offers a diverse range of bottle shapes and colors
Vertical integrated solution offering
Import / Distribution

### Capital Investments

New glass bottle making technology (Press and Blow method)
Short run manufacturing capability

3

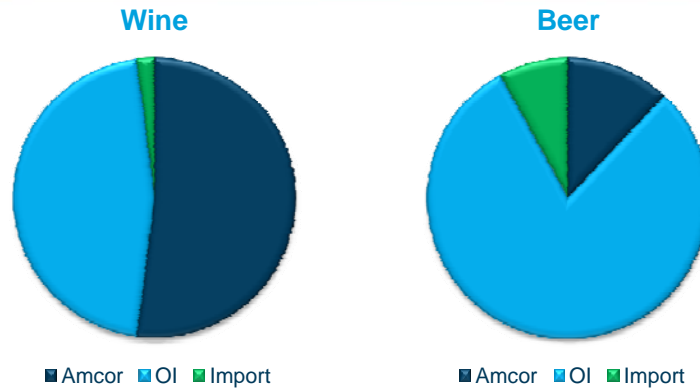
## Glass

- Fully integrated supplier of glass
  - Wine packaging
  - Beer & CSD packaging
  - Globally sourced glass offerings



4

## Glass - Segments & Market Share

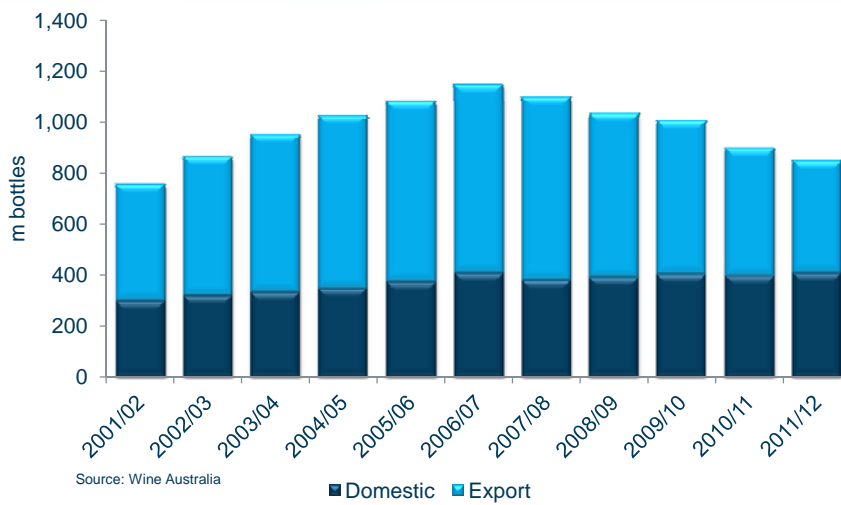


Strong position in wine end markets and a strong niche position in beer



5

## Glass – Industry wine volumes



6

## Glass - Gawler Plant Key Facts

- Commissioned May 2002
  - G1 – 2002, G2 – 2004, G3 – 2010
  - 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



7

## 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 unique new innovation for the Australian wine market – an internally embossed glass bottle. Featuring a swirl shape within the bottle, while retaining a completely smooth exterior surface, this new product will change the nature of glass embellishments.



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8

## Wine Closures



9

## Wine Closures - Key messages

### 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® range)
- Innovation leader
- Strong customer support

Strong business generating significant cash



10

## Wine Closures - business overview



**STELVIN**<sup>®</sup>



### Key Facts and Figures (FY 2012)

Sales (m units)	321
Co-Workers	108
Customers	100+

### 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

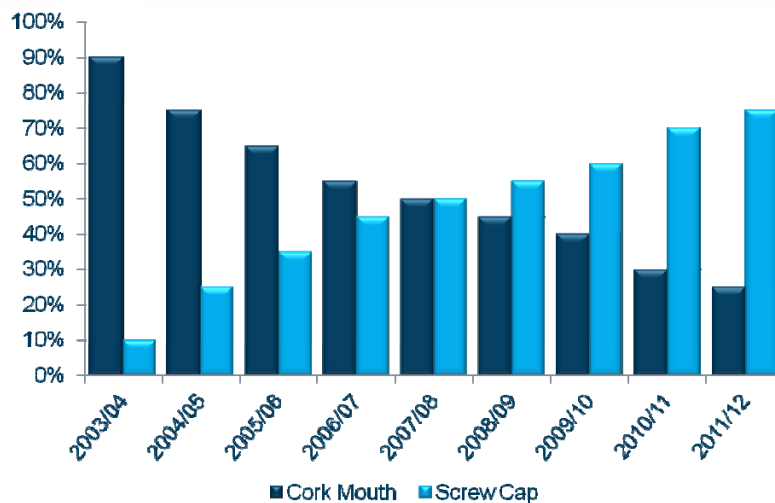
Amcor Closures offers a full service solution (closures, capping equipment & technical expertise)

### Capital Investments

Upgrade in metal decoration with UV capability

11

## Wine Closures - Volumes



12



## 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



13

## 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.



14

## 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

15

## Wine Closures – Value Proposition

### 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

16



Wine Closures – Video



**amcor**



17



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