



Supply Chain Overview

November
2025



Our Vision

What We Offer

We craft extraordinary Ice Cream experiences.

From our products to packaging to communications to in-store and supply chain, we create the extraordinary at every touch-point to deliver on our promise to make Life Taste Better.

Why We Exist

Ice cream has the power to transform simple moments into lifelong memories.

We aim to bring the power of ice cream to more people, in more places, in new and unexpected ways.

How We Deliver

“We take pleasure seriously”* to make life taste better.

*Mr Thomas Wall, 1922

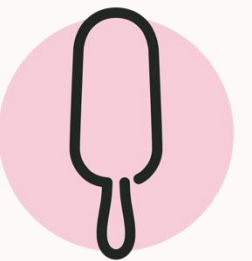


Create the

extraordinary



Take pleasure
seriously



Life tastes better with
ice cream



A Focused Strategy and Integrated Culture

Mission

“Life tastes **better** with ice cream”

Vision

As a global ice cream leader, grow the market by crafting extraordinary experiences that turn ordinary moments into lasting memories

Strategic pillars



Growth



Productivity



Re-investment

Enablers

Tech-enabled marketing, sales & supply chain operations

Focused **sustainability** agenda

The **Ice Cream** Way



35 Factories Worldwide | Serving consumers in over 80 Countries

■ Sales presence
■ India expected to be part of perimeter in 2026

Factory Location ●

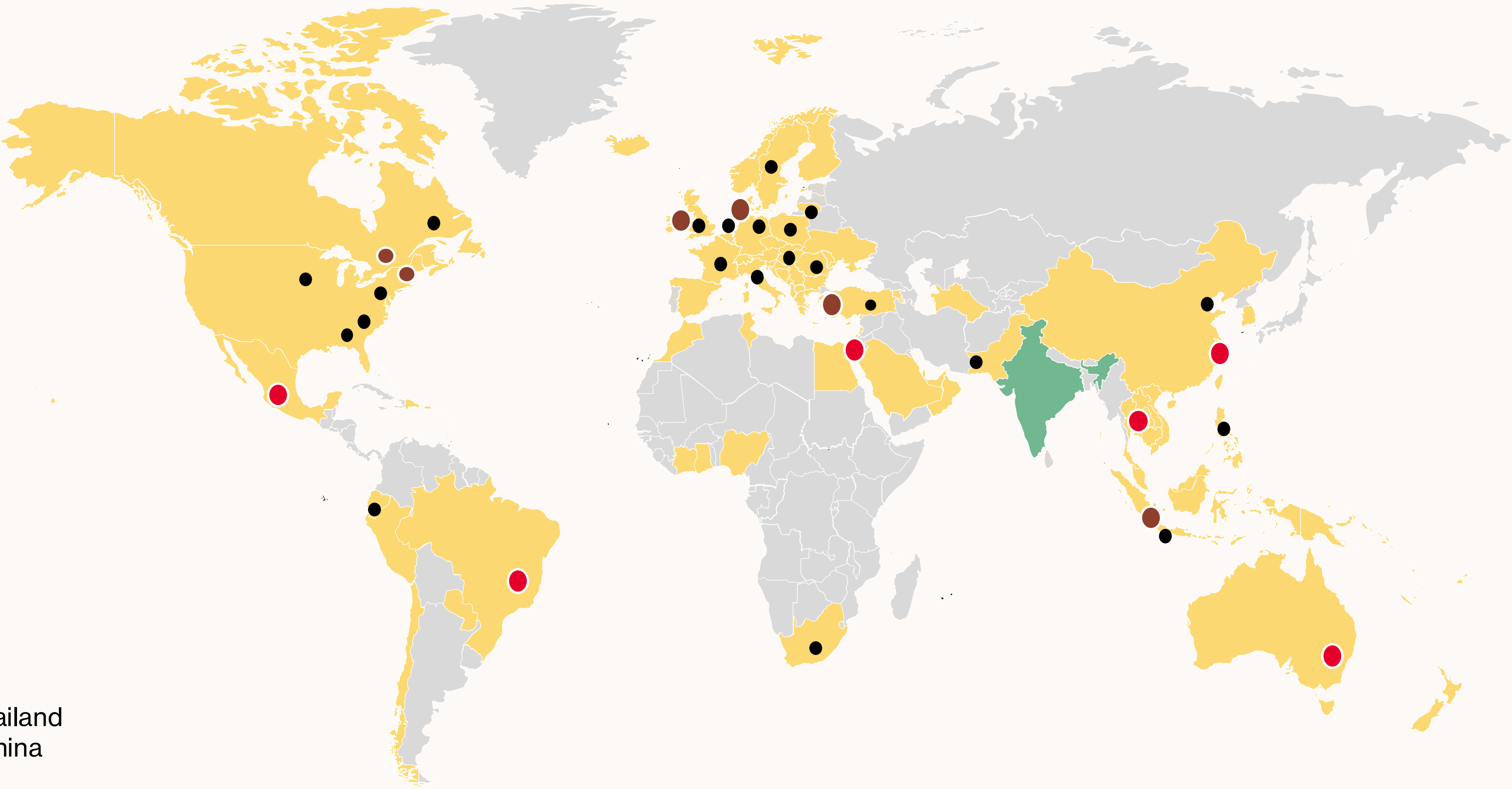
- | | |
|--------------------------|----------------------------|
| St Albans, USA | Veszprem, Hungary |
| Sikeston, USA | Gloucester, UK |
| Covington, USA | St Dizier, France |
| Waterbury, USA | Caivano and Mappano, Italy |
| Simcoe, Canada | Konya and Corlu, Turkey |
| Guayaquil, Ecuador | Lahore, Pakistan |
| Flen, Sweden | Lords View, South Africa |
| Heppenheim, Germany | Beijing, China |
| Hellendoorn, Netherlands | Pasig, Philippines |
| Mazeikai, Lithuania | Cikarang, Indonesia |
| Banino, Poland | |
| Suceava, Romania | |

R&D Centres ●

- | | |
|-----------------------|------------------------|
| Englewood-Cliffs, USA | Amsterdam, Netherlands |
| Burlington, USA | Sarigazi, Turkey |
| Colworth, UK | Jakarta, Indonesia |

Co-existing Factory and R&D Centre ●

- | | |
|-------------------------|-------------------------------|
| Tultitlan, Mexico | Minburi and Bangkok, Thailand |
| Valinhos, Brazil | Shanghai and Taicang, China |
| Konya and Corlu, Turkey | Minto, Australia |



€500m Cumulative Global Productivity Improvement Programme

01

Supply chain transformation



- A E2E network cost optimisation
- B Procurement efficiency
- C Step change in manufacturing productivity



~€350-380m¹

Medium-term gross savings

02

Overheads reduction



- A De-layered front-line focused organisation
- B Cost of standalone company less than operating as a division
- C Lean headquarters with E2E P&L accountability in markets



~€70-100m¹

Medium-term gross savings

03

Tech-enabled productivity



- A Efficient and fit-for-purpose tech infrastructure
- B Scale and leverage Global Business Solutions



~€30-50m¹

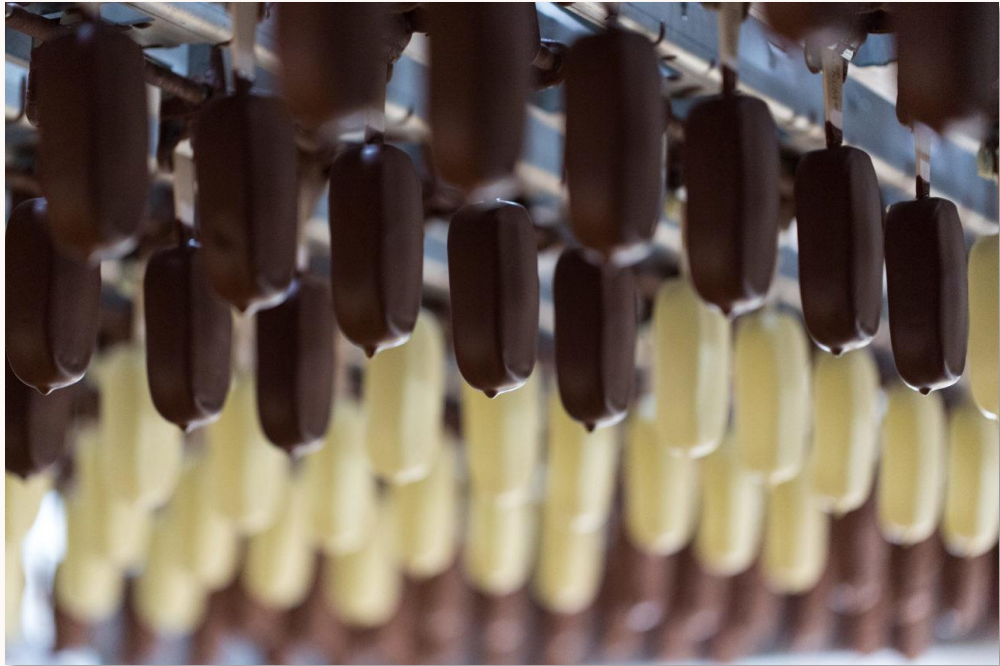
Medium-term gross savings

~€150m savings delivered to date (2024 & H1'25)



Note: 1. Targeted cumulative medium-term savings

Gloucester | The Home of British Ice Cream Since 1959



£50m

Direct investment

Delivered over 2 years

A multimillion-pound investment transforming the Gloucester factory into a world-class, sustainable ice cream hub – boosting capacity, driving innovation, and delivering 600 million treats a year in over 20 markets.



+25%

Capacity
with 3 new high-speed
lines



+25%

increased Twister line
speed, up to 500 pieces
per minute



+20%

increased Solero line
speed, up to 540 pieces
per minute



+5%

Energy efficiency
improvements



+20%

YoY reduction in food
waste



1,200 m²

new spare parts store
constructed



80%

of output serving
the UK market



67%

of EU Viennetta
supply produced on
site



Life tastes *better*
with ice cream

