

Cabka Capital Markets Day 2023

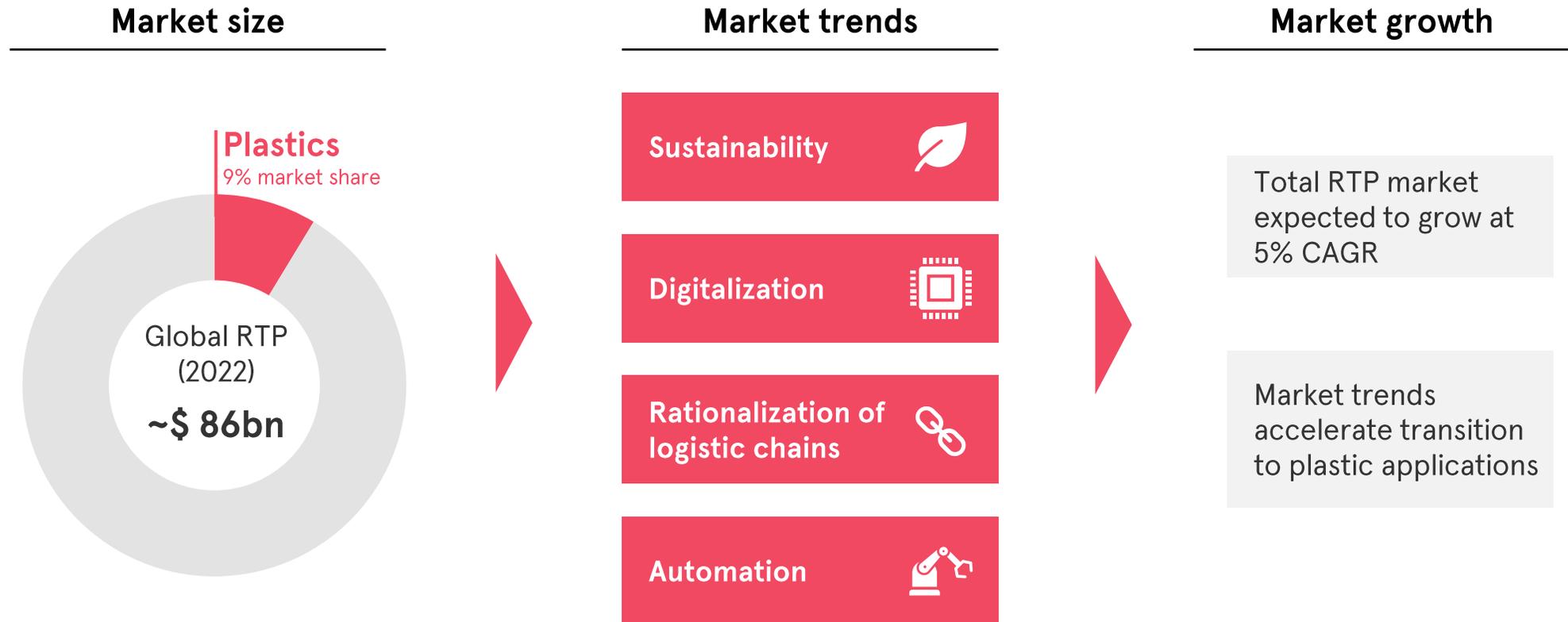
Jointly creating the load carriers of tomorrow

by Naiara Loroño and Guillermo Santamans

Valencia, June 13, 2023

Outpacing the global RTP market, driven by market trends

Plastic expected to outpace traditional feedstocks



Sources: Statista, Straits Research, Grand Views Research, Expert Market Research

Market Trend: Sustainability

Reducing the environmental impact of supply chains through material handling solutions

Corporate Social Responsibility (CSR) plays a crucial role in a company's brand perception:

- Reducing carbon footprint using sustainable manufacturing/production practices
- Products from plastic waste: in 2021 5.5t of plastic from post-consumer recycled plastic were introduced into the EU economy
- An increase of around 20% compared to 2020 consumption

Green Logistics:

- Any business practice that minimizes the environmental impact and the carbon footprint of logistic activities
- Activities like transport, packaging, recycling and storage

80%

of companies emphasizing **ESG initiatives**

40%

of consumers expected to make **purchasing decisions** supporting a **more sustainable future**

56%

of consumers say companies should be **transparent about social impact**

Market Trend: Digitalization

Facilitating the implementation of intelligent technologies in client's processes

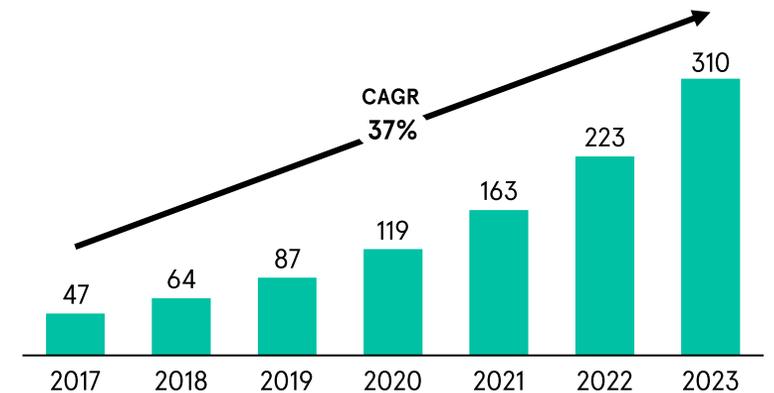
Industry 4.0:

- Companies increasingly gaining awareness that integration of advanced technologies is crucial to achieving operational excellence when adopted at scale
- COVID-19 pandemic disruptions have accelerated the transition to I4.0 tech
- Represents long-term resilience to and sustained competitive advantage

IoT in logistics:

- CAGR of +14% (2022-2026)
- Impacts shipment, inventory, fleet management, etc.

Global Industry 4.0 Market Size (2017-23), in USDbn



Cabka clients among the leading adopters of I4.0

#2 in EU

ABB

#3 in EU



#3 in US



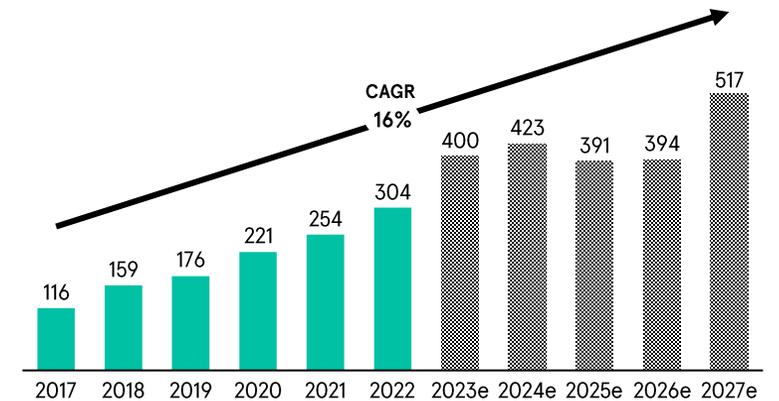
Market Trend: Automation

Facilitating the implementation of intelligent technologies in client's processes

Automation and Robotics in logistics:

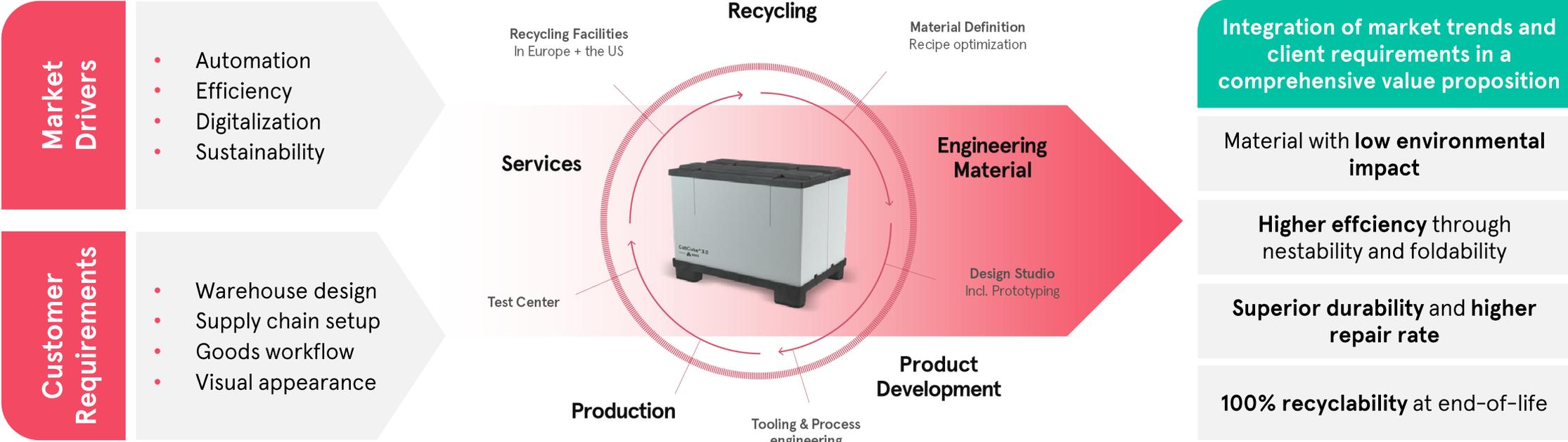
- Increase of productivity and efficiency, leading to cost savings and improved quality of products or services
- Reduces risk of workplace injuries by taking over repetitive or dangerous tasks, allowing human workers to focus on more complex and higher-value activities
- Offering opportunities for increased precision, speed, and accuracy
- Also being adopted in sectors beyond manufacturing, such as healthcare, agriculture, and logistics
- Automation CAGR +11% (2023-30)
- Robotics CAGR +15% (2023-30)

of installed industrial robots p.a. (2011-27e), in '000



Cabka's Competitive Edge

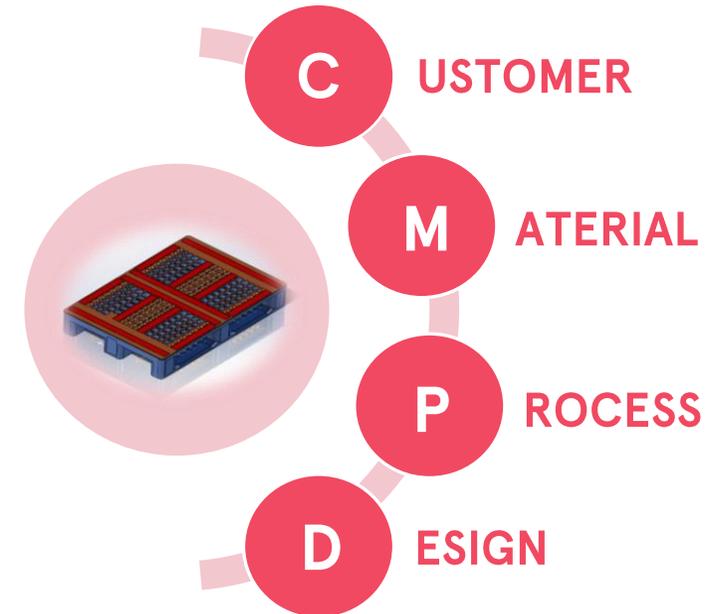
Integrating a detailed understanding of both market and customer demand in the development of benchmark products



“Innovation-as-a-Service”

Encompassing all disciplines relevant for solution-based product innovation

- **Essential expertise** consolidated under one roof:
 - Customer and Market experts
 - Process experts
 - Material experts
 - Design experts
- The **multidisciplinary** and **multiangled** approach guaranties that the product is optimized in every aspect



New Product Creation Journey

Following a structured development approach to deliver on ambitious timelines



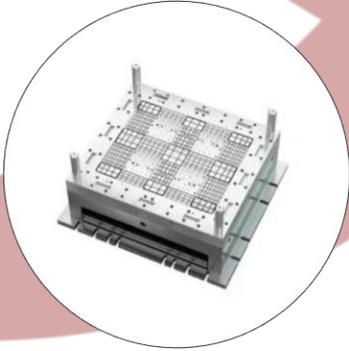
CHALLENGE



CONCEPT
1 – 3 Months



TECHNICAL DEVELOPMENT
6 – 9 Months



TOOLING & VALIDATION
6 – 9 Months

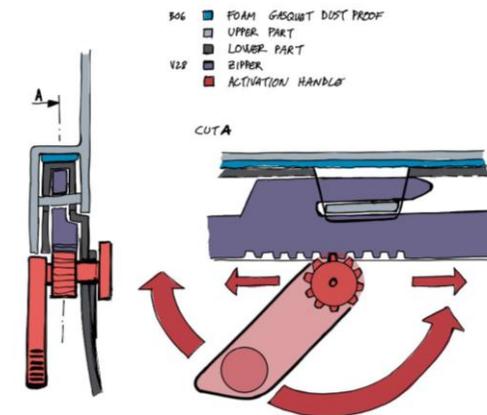
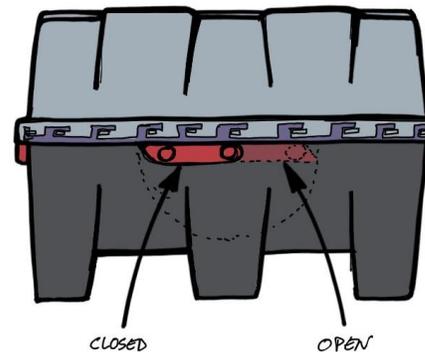


PRODUCT LAUNCH
2 Months

The Cabka Way: Creating a Concept

Finding unconventional and creative solutions to unconventional problems

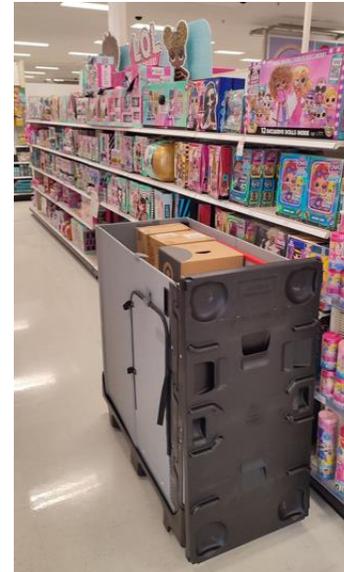
- Creativity and out-of-the-box thinking is key in the initial Conceptual Stage
- No limitation to produce innovative solutions



The Cabka Way: Co-Creation

Closely collaborating with our customers throughout the entire development process

- **Co-Brainstorming** and **Co-Creation** together with our customers to have all key inputs on the table from the very beginning
- The customer is in the driver seat – always



Jointly creating the load carriers of the future
Cabka CMD 2023
June 13, 2023

The Cabka Way: Prototyping is King

Introducing product prototypes into logistic systems only to assure ideal fit

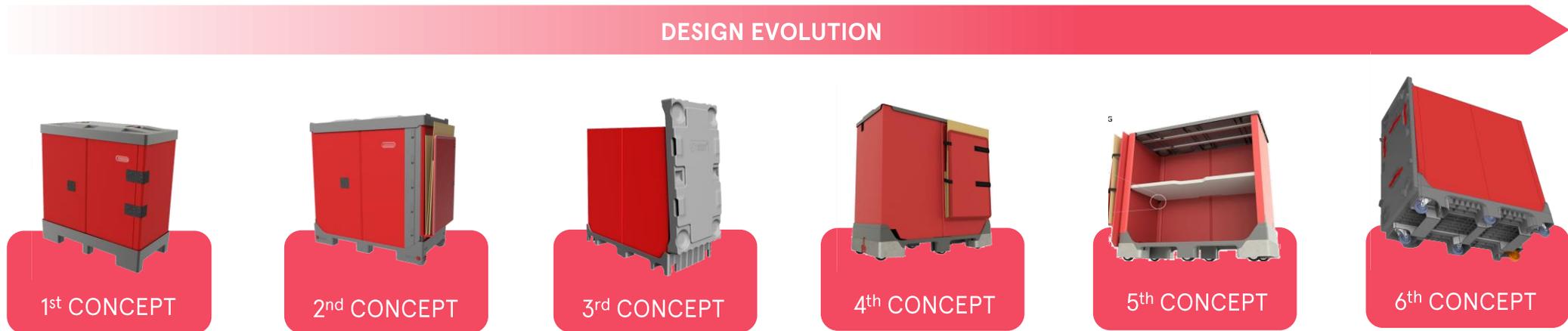
- “Learning by using” – The use of prototypes in real situations helps the team to understand the small details of the user case
- Prototypes allow for spreading the design concept throughout the client’s organization
- Enable the collection of feedback from all stakeholders and the buy-in from all relevant departments



The Cabka Way: Flexibility

Iterating the product concept to finetune the product for optimum performance

- **Adaptability to change** – As the project evolves the product requirements also change
- **Ultimate success lies in the details** – An excellent product requires fine tuning through multiple iterations until fully functional



Offering additional value – beyond plastic benefits

Cabka's unique integrated capabilities



Material
expertise



Processing
technology



Product
design



Customer
intimacy

