

 **Nestlé PURINA**

European Food Manufacturing Summit – Dusseldorf 11-12 June 2025

Professional Overview

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Global Strategic Business Unit Nestle'
Purina



MAIN RESPONSIBILITIES

- Establish and deploy standardized manufacturing processes across all regions.
- Ensure capital expenditure plans align with strategic goals and deliver value.
- Oversee initiatives that drive growth and innovation within key product categories.
- Lead efforts to enhance operational efficiency and effectiveness globally.
- Streamline supply chain operations to improve delivery and reduce costs.

Nestle' Purina in Numbers

First Petfood produced in **1926**

Acquired by Nestle in **2001**

About **20,000** associates

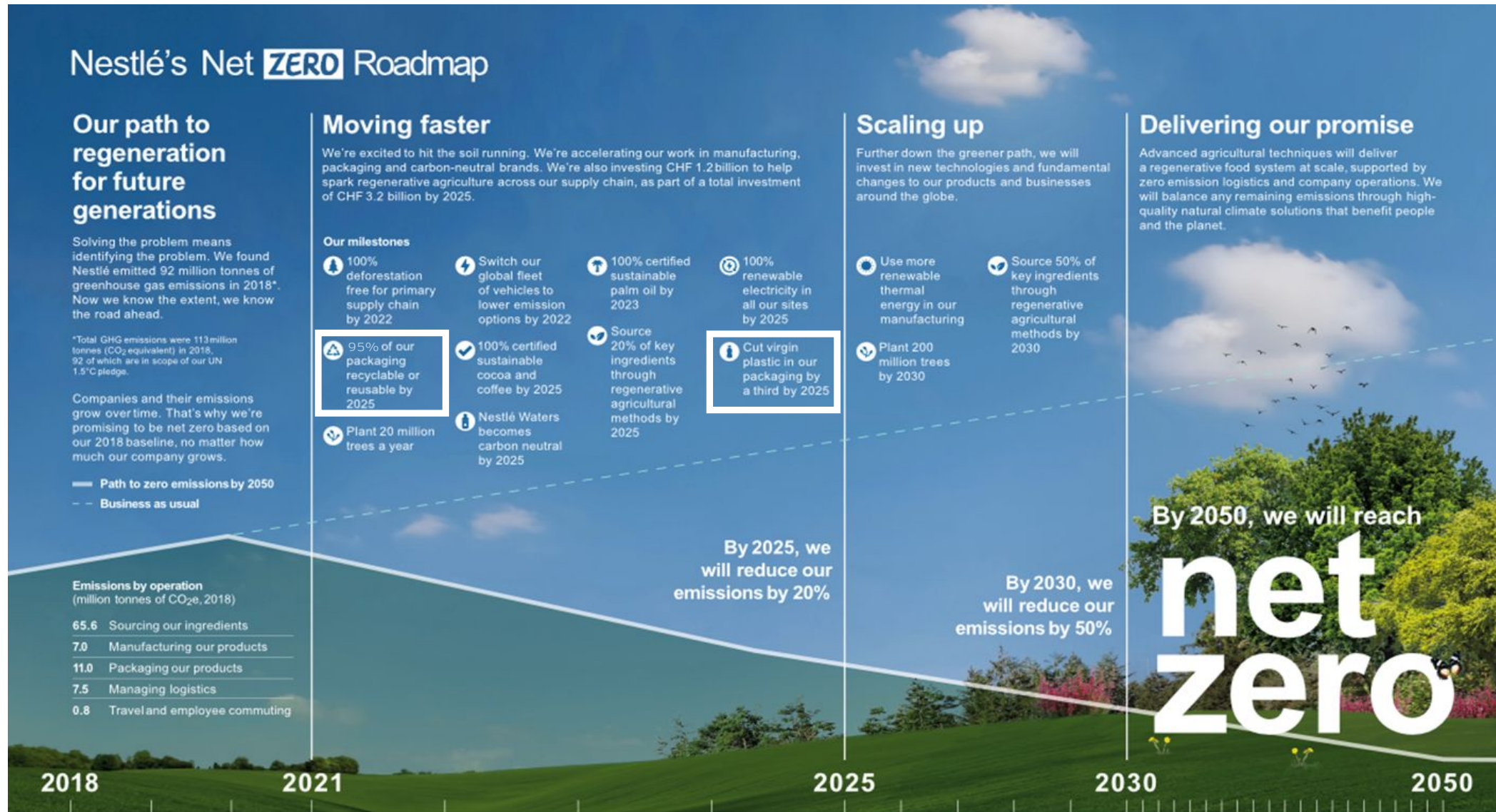
40+ factories in **19** countries Worldwide

18.9 billion CHF NNS in 2024

6 Iconic Billionaire brands



Our Corporate Roadmap to ZERO

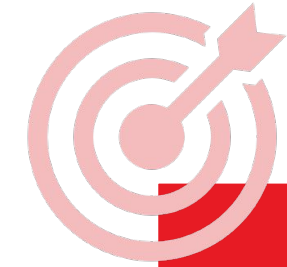


...Following a Five-Pillars Approach



Cascading Strategy from Corporate to Purina

...the importance of **SETTING THE RIGHT EXPECTATIONS...**



Targets by 2025

- 95% of Packaging Designed for Recycling
- Reducing Virgin Plastics Usage by one-third globally

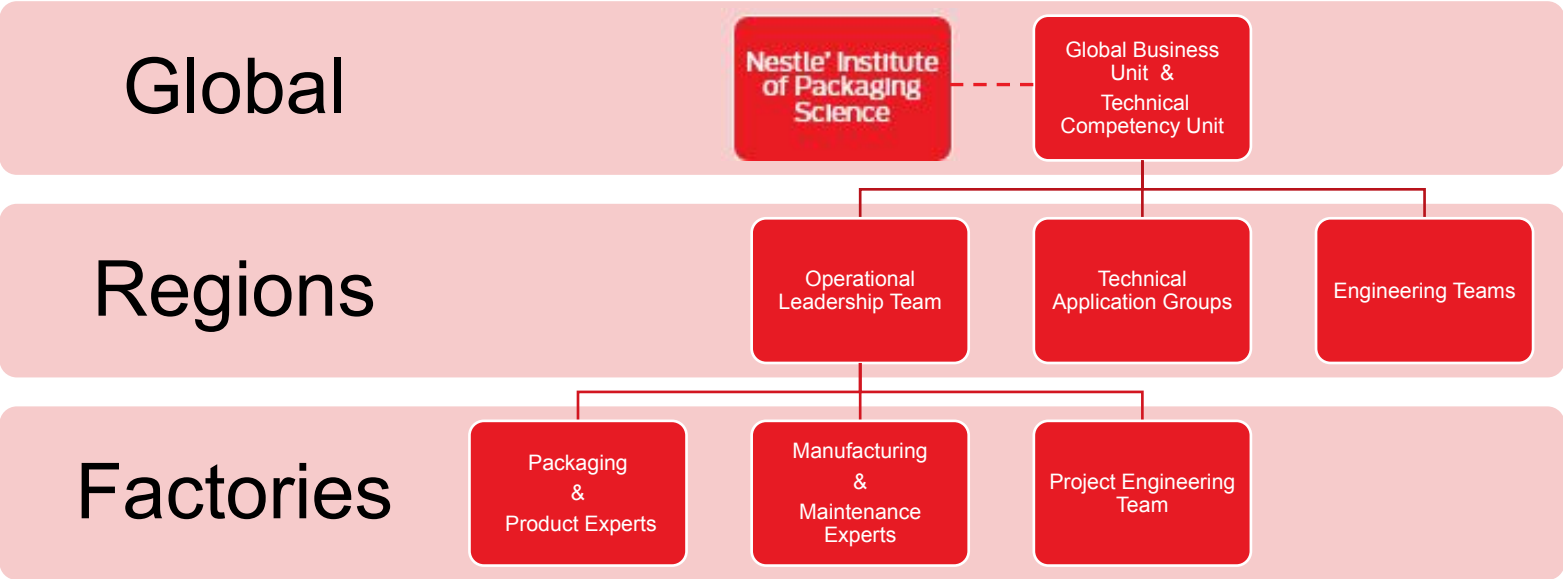


Non-Negotiables

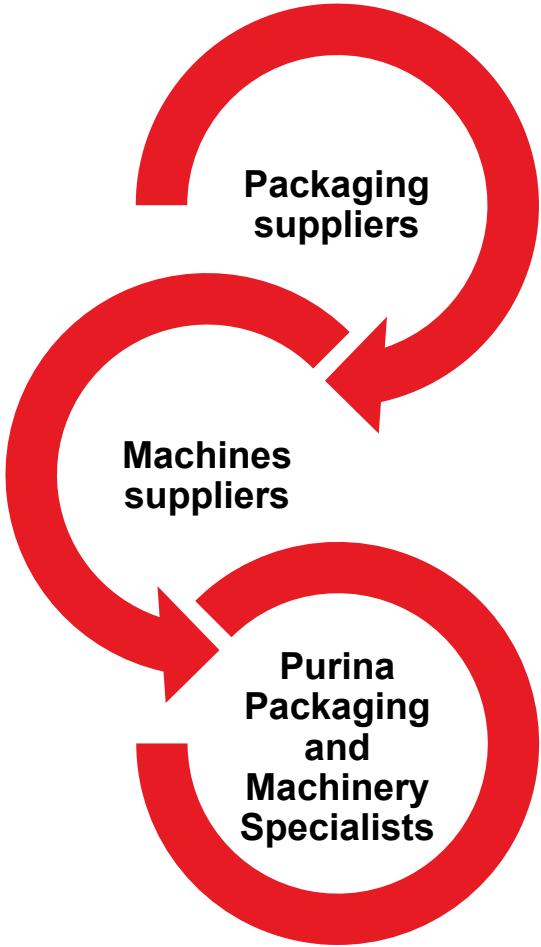
- Ensure Food Safety and Product Palatability
- Maintain Consistent Consumer Experience
- No Adverse Effects on Production Line Performance
- Minimal Impact on Cost of Goods Sold (COGS)

The Sustainability Journey of Purina Packaging

... **CLEAR GOVERNANCE** and **STRONG PARTNERSHIPS** ...



Monthly Steering Committee meetings are conducted at both Global and Regional levels to ensure coordinated execution of the roadmap and to address any roadblocks.



The Sustainability Journey of Purina Packaging

...with global alignment on **KEY STRATEGIC MILESTONES**...



DRY & SNACKS

- Transition from multilayer bags to mono-polyethylene.
- Increase the recycled plastic content across all plastic packaging materials.
- Increase filling rate.
- Promote paper-based packaging where technologically feasible

WET

- **Develop a monomaterial pouch suitable for retort processing.**
- Increase the recycled plastic content in all plastic packaging materials.
- Transition to beverage-grade aluminum cans to enhance the use of recycled content.
- Reduce the environmental impact of cans using new coatings.

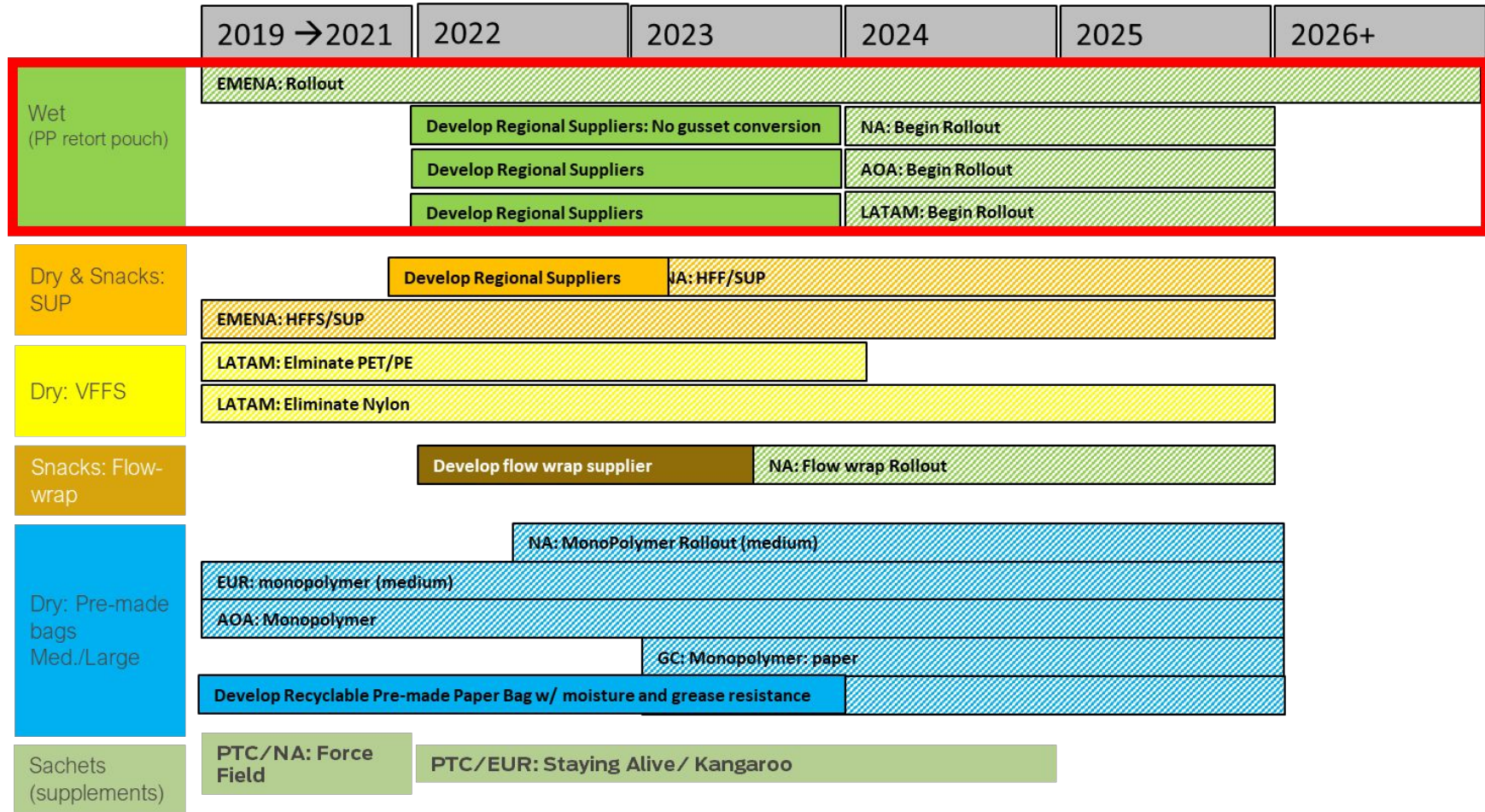


The Sustainability Journey of Purina Packaging

...and **RIGOROUS IMPLEMENTATION PLANS** by product category

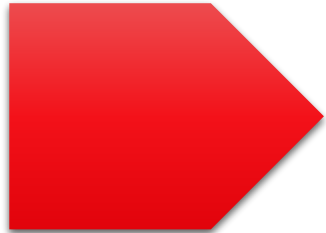
Legenda

Development
Commercialization

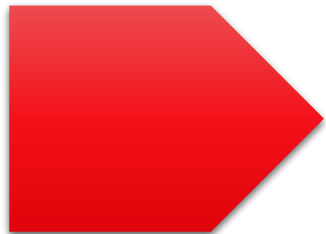


Purina's Sustainability Journey in WET Pouch

PIONEERING THE FUTURE in an unknown territory...



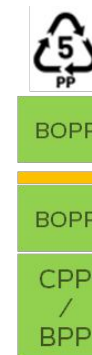
Project "Green Lantern" started in 2018



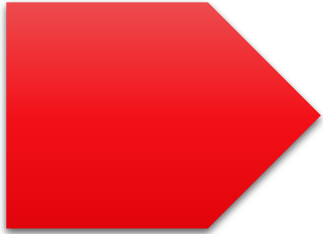
A **MULTIDISCIPLINARY TEAM** has been created involving all Internal experts and establishing a **PARTNERSHIP WITH THE PACKAGING & FILLER SUPPLIERS**



A **CLEAR AND AMBITIOUS SCOPE** agreed with all stakeholders

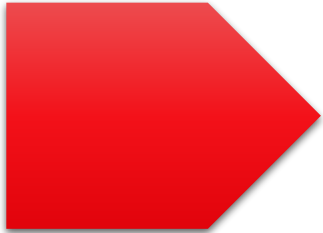


Purina's Sustainability Journey in WET Pouch ...overcoming **CHALLENGES** since the beginning...



OXIDATION PROTECTION:

Developing a Monomaterial structure that replicates the barrier provided by the multilayer's aluminate film with all products texture and in all climatic zones.



PRODUCTION LINE READINESS:

Addressing the readiness of fillers given the different generations of machines installed.



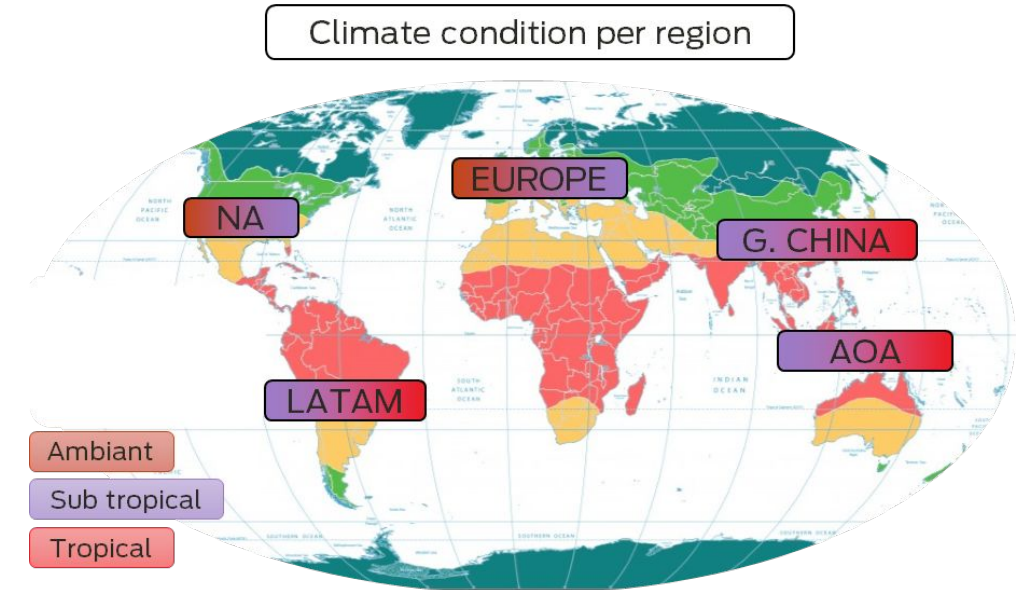
CAPACITY LIMITATIONS AND INCREASED PACKAGING COSTS:

Establishing a network of alternative suppliers to ensure packaging availability at the right cost.

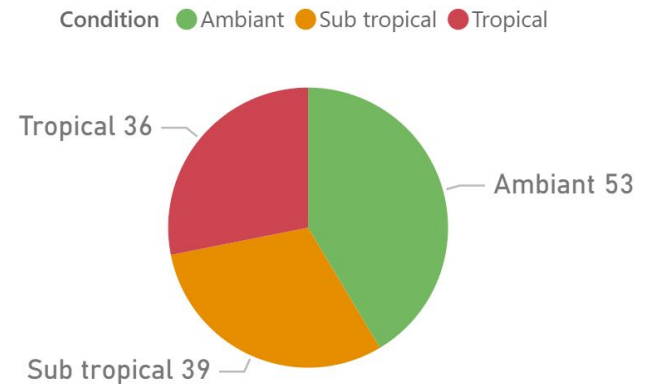
Purina's Sustainability Journey in WET Pouch

...with **ADAPTED SOLUTIONS** & **CONTINUOUS DEVELOPMENT**...

- ❑ Conducted over 130 shelf-life studies in climatic chambers for all different textures and sensitive recipes.
- ❑ Tested multiple specifications until arriving at the current one; a new film structure adapted for severe conditions is currently under evaluation.
- ❑ Developing a shelf-life model to predict results and expedite the development process.



Number of SL Studies by Condition

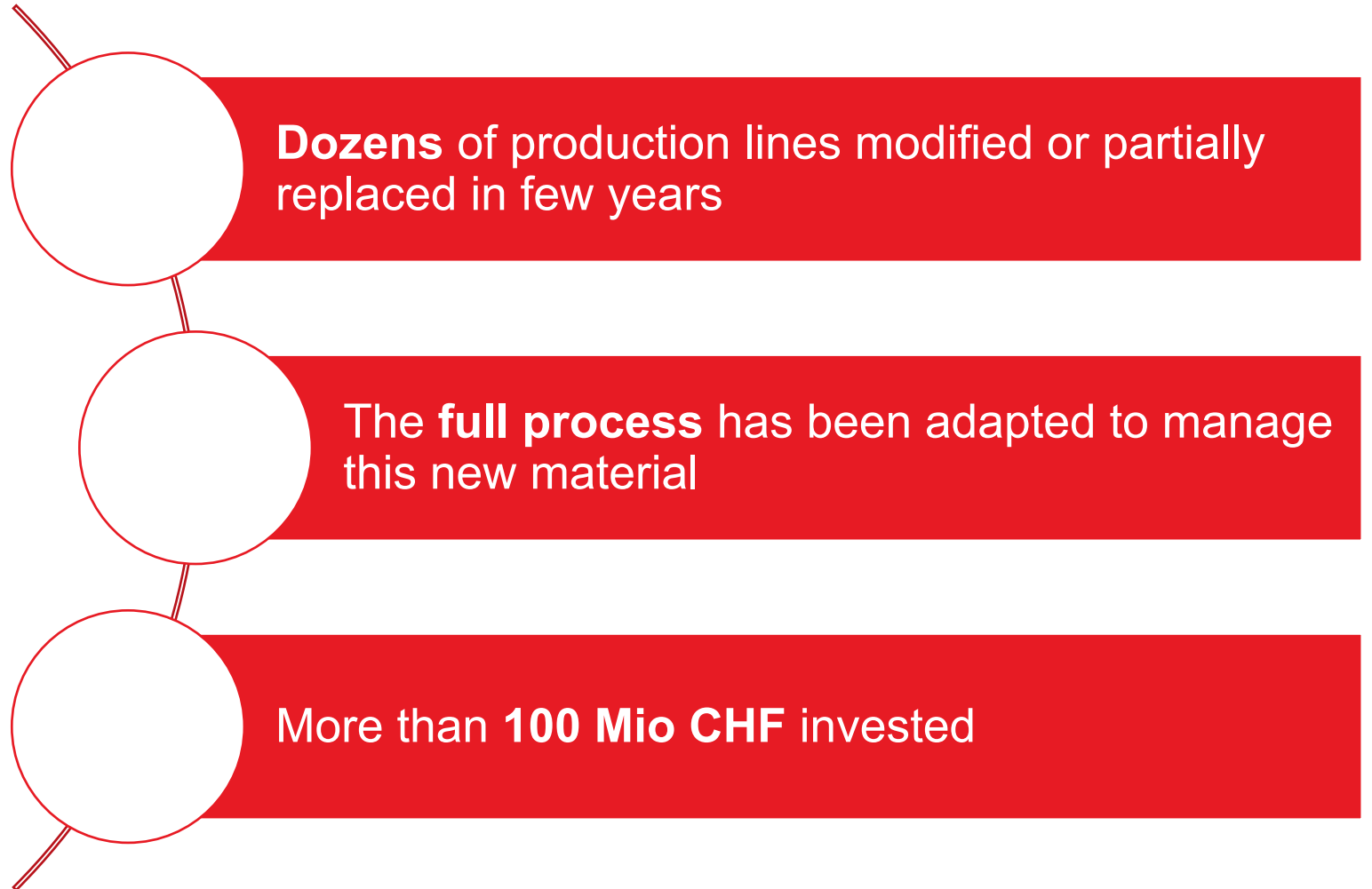


Purina's Sustainability Journey in WET Pouch

... **EXTENSIVE RESOURCE DEPLOYMENT** and **CAPITAL INVESTMENT** ...

Key Enablers

- Implementation of Filler Upgrade Kits.
- Adoption of Total Productive Maintenance (TPM) Methodologies.
- Development of Comprehensive Training Programs for Operators and Maintenance Technicians.



Dozens of production lines modified or partially replaced in few years

The full process has been adapted to manage this new material

More than 100 Mio CHF invested

Purina's Sustainability Journey in WET Pouch ...

Finding solutions to **MAINTAIN TOTAL DELIVERED COST**

PRODUCTIVITY INCREASE

- Replace existing fillers with High-speed ones
- Increase the durability of new parts

PACKAGING REDESIGN

- Gusset Removal
- Headspace reduction
- Continuous improvement of the specifications

ALTERNATIVE SUPPLIERS

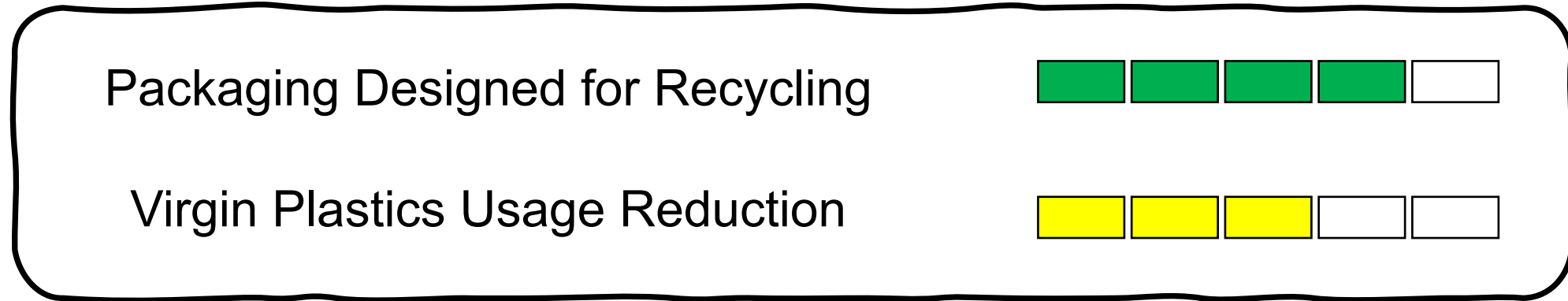
- Qualify additional suppliers to meet the same specifications
- Establish suppliers in each zone to ensure reliable supply



...And finally, upon reaching a critical mass in the market, prices will decrease.

The Sustainability Journey of Purina Packaging

WHERE WE ARE (Q1 2025)...



DRY & SNACKS

- All tasks have been completed in DRY.
- Some transitions are still planned for the Snacks category.

WET

- Some delays in Europe due to packaging availability.
- The start-up in AOA/LATAM has been postponed pending the validation of a new barrier.

The Sustainability Journey of Purina Packaging

WHAT'S NEXT?

Continue

- Achieve 100% recyclable or reusable packaging.
- Increase the use of recycled content in packaging materials.

Strive

- Reduce packaging complexity.
- Replace plastic with Paper.



More active
Advocacy for
Circularity

Questions?