



ORIOR GROUP

Half Year Results 2018



22 August 2018

Daniel Lutz, CEO
Ricarda Demarmels, CFO

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Agenda

Opening remarks by CEO

- CEO Statement
- ORIOR in the context of the ORIOR 2020 strategy

Half year results 2018

- New revenue recognition standard: IFRS 15
- Highlights
- Key figures
- Switch to Swiss GAAP FER announced

ORIOR 2020 strategy

- Value creation model
- Strategic pillars and overview of projects and measures 2015-2018

Outlook for the second half of 2018

- Environment and market, ORIOR Focus and Outlook

CEO Statement

- Good results in the first half thanks to ongoing rigorous execution of the ORIOR 2020 strategy
- Broad organic growth thanks to innovation, strong brands, key accounts and food service operations
- Gross margin under pressure: high raw materials and packaging materials costs, weaker Swiss franc
- Successful conclusion of Biotta takeover; official centre of competence for organic vegetable and fruit juices as of 17 May 2018
- Good and solid financial numbers and balance sheet

ORIOR in the context of ORIOR 2020 strategy goals

ORIOR in the year 2020

- 1 ORIOR remains a stable and financially strong food group. ✓
- 2 ORIOR has achieved solid growth in Switzerland including bolt-on acquisitions. ✓
- 3 ORIOR has steadily improved its operating results, supported by high cost efficiency. ✓
- 4 ORIOR remains the market leader in existing and new product niches. ✓
- 5 ORIOR is the most innovative food group in Switzerland, and owns strong and unique brands. ✓
- 6 ORIOR is European. ✓
- 7 ORIOR offers shareholders an attractive dividend yield and has steadily increased its dividend payout. ✓

All implemented initiatives and measures with positive impact on all ORIOR 2020 targets

THE **ORIOR**
RESPONSIBILITY

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PASCALE NAESSENS

Pur genießen

NATÜRLICH & GESUND



my ENERGY



New ready meals concepts to go





Ticinella
with a brand
new look



REDESIGN
From mid-2018



Le Patron Orior Menu AG

Rohrmattstrasse 1 | CH-4461 Böckten | T +41 61 985 85 00 | info@lepatron.ch | www.lepatron.ch



BALLOTTINE

A classic with a modern touch

- ✓ Top-quality Suisse Garantie label
- ✓ Tender inside, crispy outside
- ✓ Sourced from local farmers



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SUPERPOWER
FOR
EVERYDAY HEROES

FRUITS ♡
VEGGIES



Biotta®
Der Schweizer Bio-Pionier

VIVITZ

MEIN SCHLUCK FREIHEIT

NEU

FRISCH AUFGEBRÜHTER
BIO EISTEE

VIVITZ

MEIN SCHLUCK
FREIHEIT

HANF

KALORIEARM
OHNE KRISTALLZUCKER
VEGAN

BIO

VIVITZ

NATÜRLICH TRINKEN

BIO - VEGAN - SWISS MADE

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New revenue recognition standard: IFRS 15

- New revenue recognition standard IFRS 15, effective as of 1 January 2018
- Introduces a single, principles-based five-step model for the recognition of revenue, applicable to all contracts with customers
- Impact on ORIOR Group:
 - Under the amended standard, the Group is now considered an agent rather than a principal in certain transactions with customers
 - This leads to a reduction in both revenues and cost of sales
 - There is no impact on the bottom line, the consolidated balance sheet or the cash flow statement
- 2017 numbers have been restated

in CHF million	First half 2017		
	Reported	IFRS 15 effect	Restated
Revenues	281.3	–22.2	259.1
Cost of Sales	–163.9	22.2	–141.7
Gross margin	117.4	0.0	117.4
as a % of revenues	41.7%	+357bps	45.3%
EBITDA	27.7	0.0	27.7
as a % of revenues	9.9%	+84bps	10.7%

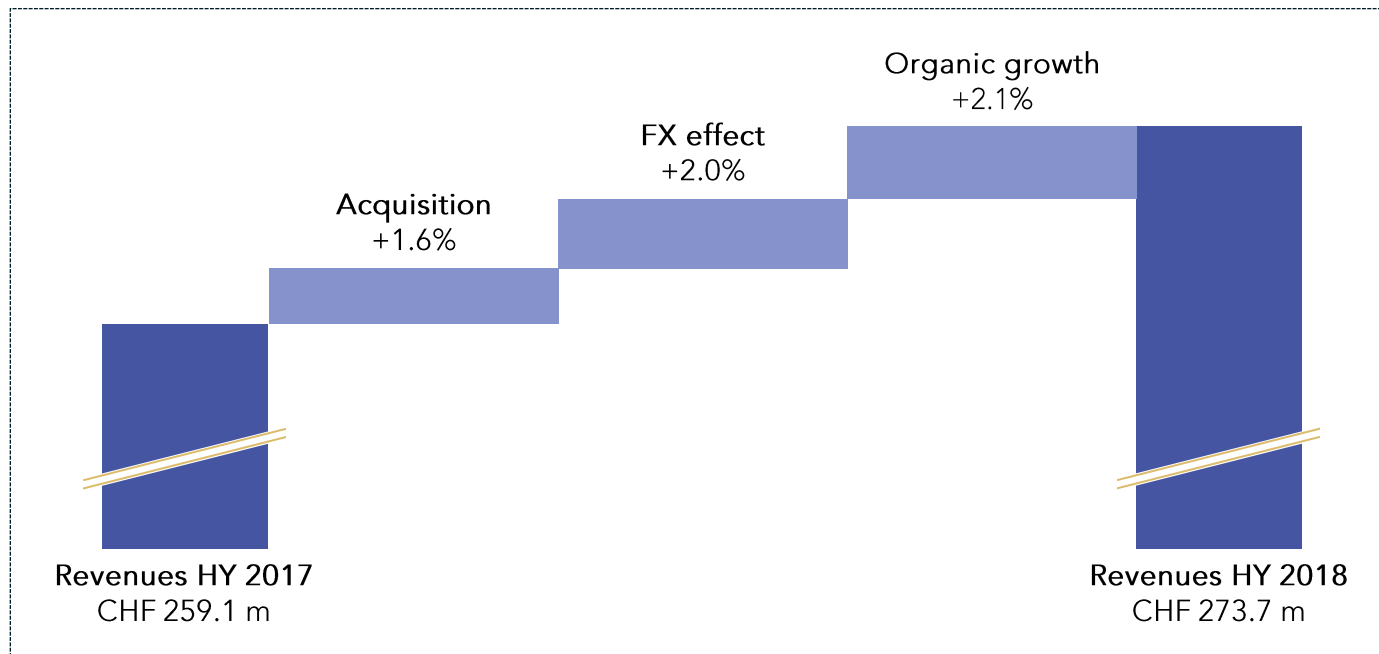
in CHF million	Fiscal year 2017		
	Reported	IFRS 15 effect	Restated
Revenues	585.5	–46.1	539.4
Cost of Sales	–345.0	46.1	–298.9
Gross margin	240.5	0.0	240.5
as a % of revenues	41.1%	+351bps	44.6%
EBITDA	57.7	0.0	57.7
as a % of revenues	9.9%	+84bps	10.7%

Successful first half – organic growth from all segments

Revenues	Adjusted EBITDA ¹	Adjusted Net profit ¹	Operating Cash flow
CHF 273.7 m +5.6%	CHF 28.7 m +3.7%	CHF 15.3 m +3.2%	CHF 20.8 m Cash Conversion 76.5%
Organic growth 2.1% from all segments	Adjusted EBITDA margin 10.5% -19 bps	Adjusted Net profit margin 5.6% -13 bps	Cash Conversion (Ø last 4 fiscal years) 75.9%

¹ Excluding acquisition-related transaction and extraordinary costs.

Revenues +5.6%



- Thurella (Biotta and GESA) consolidated as of 17 May 2018
- Organic growth of 2.1%
 - broadly based
 - thanks to steady focus on innovation, brands and customer relationship management

Adjusted EBITDA +3.7%

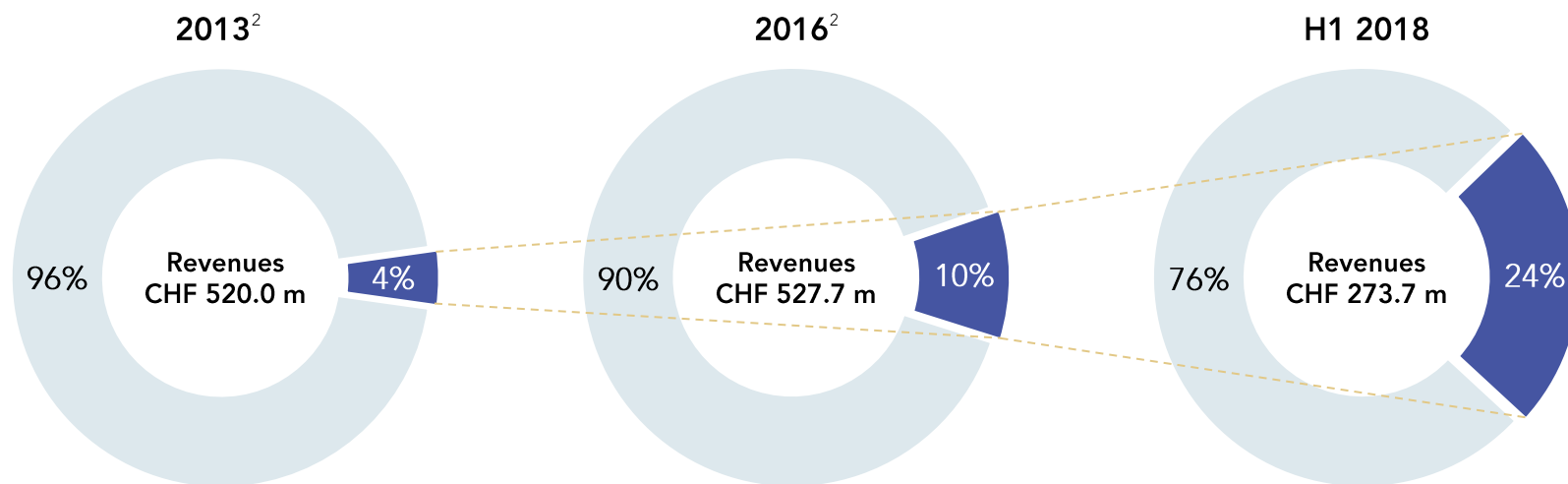
CHF million	Jan – Jun 2018	Jan – Jun 2017 Restated IFRS 15	Δ in %
Revenues	273.7	259.1	+5.6%
Cost of sales	–152.1	–141.7	
Gross profit	121.6	117.4	
as % of revenues	44.4%	45.3%	–87 bps
Adj. EBITDA¹	28.7	27.7	+3.7%
as % of revenues	10.5%	10.7%	–19 bps
Depreciation + amortisation	–9.4	–9.2	
Adj. EBIT¹	19.3	18.5	+4.3%
as % of revenues	7.1%	7.2%	

- Gross margin –87 basis points to 44.4%: high meat procurement prices, higher raw materials and packaging materials prices, weaker Swiss franc
- ¹ Incl. acquisition-related transaction and extraordinary costs in the amount of CHF 1.5 m
- Adjusted EBITDA +3.7% to CHF 28.7 m; margin –19 basis points to 10.5%: lower gross margin partially offset by strict cost discipline and focus on operational efficiency

Growing international footprint and diversification

Switzerland¹

Abroad¹



- **Categories:** Leading positions in growing niches within our domestic and foreign markets.
- **Channels:** From traditional retailers and discounters to food services providers (e.g. HoReCa, system gastronomy, schools, wholesale channels).
- **Customers:** Broad portfolio of local, regional, national and international customers.

¹ Revenue data is based on customer domicile.

² Reported revenues, i.e., excluding the effects of IFRS 15.

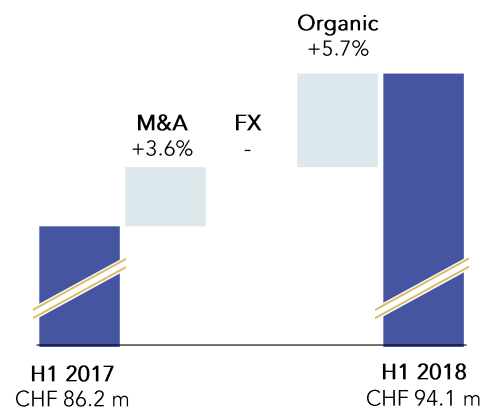
Biotta is an autonomous competence centre

Convenience <i>Category pioneer</i>				Refinement <i>Strong traditional brands</i>			International		
Fredag	Le Patron	Pastinella	Biotta	Rapelli	Spieß	Möfag	Culinor	Gesa	Spieß Europe
									
									

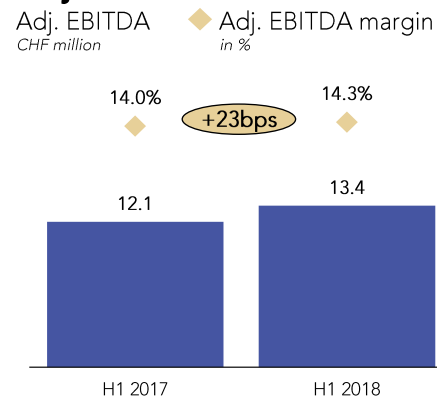


Convenience segment

Revenues +9.2%

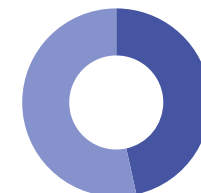


Adj. EBITDA +11.0%¹



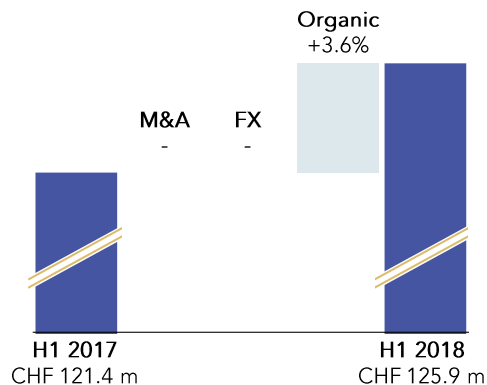
- Organic growth +5.7%
- ¹ Allocation of acquisition-related transaction and extraordinary costs in the amount of CHF 1.2 m
- Adjusted EBITDA +11.0% to CHF 13.4 m
- Adjusted EBITDA margin +23 basis points to 14.3%

Convenience
in % of Group revenues
33.0%



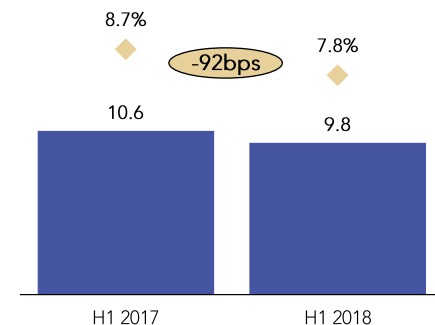
Refinement segment

Revenues +3.6%



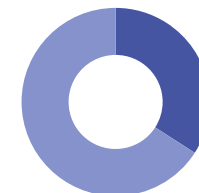
EBITDA -7.3%

EBITDA CHF million EBITDA margin in %



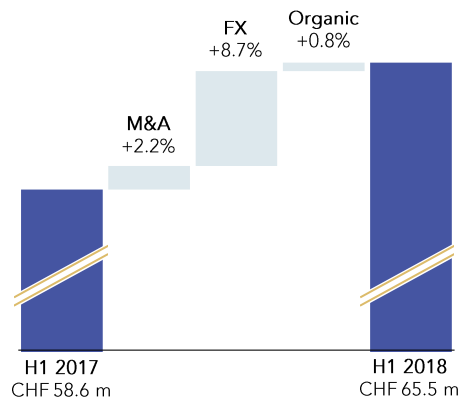
- Organic growth +3.6%
- EBITDA -7.3% to CHF 9.8 m
- EBITDA margin -92 bps to 7.8%
 - High meat procurement prices, volatile markets

Refinement
in % of Group revenues
44.1%

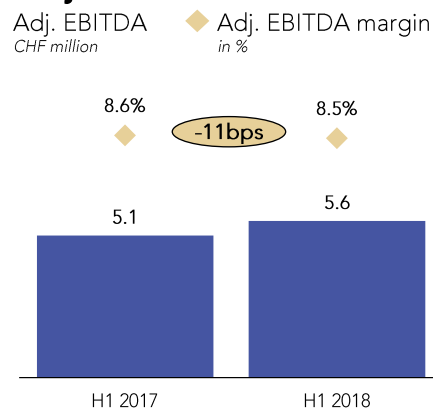


International segment

Revenues +11.7%

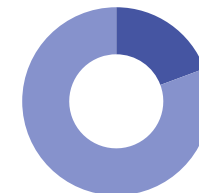


Adj. EBITDA +10.3%¹



- Organic growth +0.8%
- ¹ Allocation of acquisition-related transaction and extraordinary costs in the amount of CHF 0.3 m
- Adjusted EBITDA +10.3% to CHF 5.6 m
- Adjusted EBITDA margin –11 basis points to 8.5%

International
in % of Group revenues
22.9%



Albert
Spieß

GESA®

Adj. Net profit +3.2%

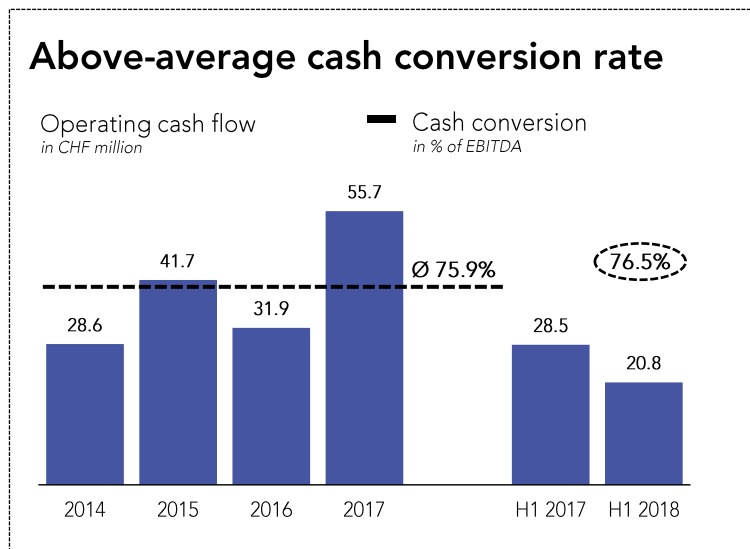
CHF million	Jan – Jun 2018	Jan – Jun 2017 Restated IFRS 15	Δ in %
EBIT as % of revenues	19.3 7.1%	18.5 7.2%	+4.3%
Financial income/financial expense	–0.6	–1.7	
Pre-tax profit¹ as % of revenues	18.7 6.8%	16.8 6.5%	
Income taxes	–3.4	–2.0	
Adj. Net profit^{1,2} as % of revenues	15.3 5.6%	14.8 5.7%	+3.2%

- Adjusted net profit +3.2%, with a slight decrease in the margin of –13 basis points

¹ Excluding acquisition-related transaction and extraordinary costs.

² Adjusted net profit, incl. tax effect of the transaction and extraordinary costs

High cash conversion



- High cash flow of CHF 20.8 m; cash conversion of 76.5%
- Steadfast deleveraging policy
- Pro forma annualized leverage ratio, adjusted for transaction-related costs, is 2.13x

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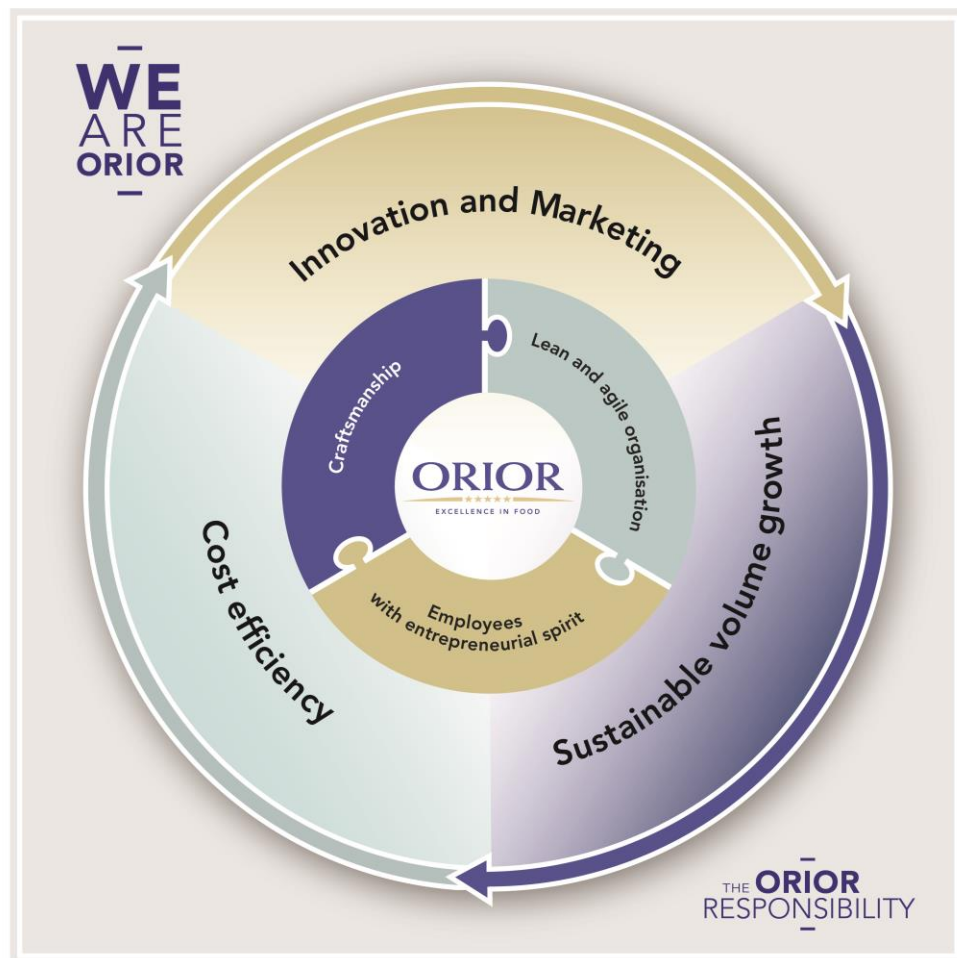
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ORIOR 2020 strategy – goal: steady value creation



We want to steadily **create sustainable value** for our employees, our customers, our business partners, the local communities and our shareholders.

ORIOR 2020 – strategic pillars

ORIOR 2020 - OUR STRATEGIC PILLARS

HOUSE OF INNOVATION



BRAND STRENGTHENING AND EXPANSION



AGILITY AND COST EFFICIENCY



THE ORIOR RESPONSIBILITY



WE ARE ORIOR



House of Innovation

- Consumer insights: Identify new needs/trends at an earlier stage, gain a better understanding of hybrid consumers, food scouting.
- Concept innovations: New formats for established and new market niches, existing retail floor space and new sales channels, including new services.
- Category innovator thanks to competence centre model: Focus, flexibility and speed (concept 30 days).
- Strengthen our innovation competence through the new organisation.

A snapshot of projects and measures under way

- Innovation Controlling set up.
- New concepts and seasonal specialties successfully introduced.
- New to-go products and concepts developed.
- Innovation Champions: 3-year pipeline 2016-2018 per competence centre.
- Group Innovation Manager (Champion Model); Oscar Marini since 1 January 2016.
- Additional investment into Innovation and Marketing.
- 360° Innovation throughout the whole value chain.

Steady value creation





POWER SALAD



Rich in protein – 25% vegetables – low in fat



Condividere il buono della vita
Gutes im Leben teilen
Partager le bon côté de la vie

Creative and surprising: Fredag's new veggie burger



Albert® Spiess

SEIT 1906



Die Bündner Trockenfleisch Spezialitäten
handgelegt in der Frischeschale.

NEU

Bündner
Spezialitäten –
sichtbar frisch





TO GO



Mediterranean antipasti
in convenient
to-go portions.



Brand strengthening and expansion

- Better differentiation of core brands and increase brand awareness.
- Take advantage of modern communication tools to reach out to consumers more effectively and efficiently (Facebook, digital communications, etc.).
- Greater focus on in-store concepts that enable direct interaction with consumers at point-of-sale (impulse purchases).
- Selectively build and expand Group marketing capabilities (Champion Model).

A snapshot of projects and measures under way

- Ticinella's new visual identity; high brand and marketing investments.
- Redesign Pastinella brand.
- New Le Patron design as of summer 2018.
- La Bottega di Mario opened in Zurich.
- Successful new Rapelli brand identity; brand awareness and brand sales improved.
- Successful repositioning of the core brand Noppa's.
- Additional investments in marketing; consistently increased since 2015.
- Acquisition of the Swiss organic beverage pioneer Biotta.

Steady value creation





my ENERGY



100% Switzerland

100% Beef

36% Proteins

3% Fat



100%	36%	3%
Rindfleisch	Elweiss	Fett
Viande de	Protéines	de mat.

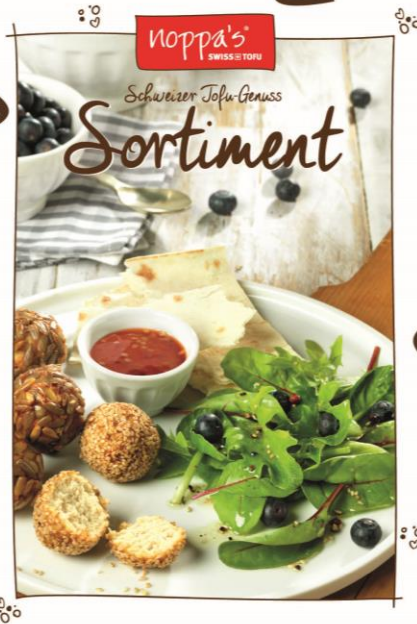
noppa's®
SWISS+TOFU

Redesign noppa's

Unadulterated Swiss tofu bliss

Font

Represents the craftsmanship and creativity behind the vegetarian and vegan recipes.



Logo

The Swissness of the products is reflected in the colour scheme

Communication

All communication tools and the packaging are designed in German and French. All the product range flyers, exhibition stands and advertisements have been adapted to the new style.

Agility and cost efficiency

- Strengthen competence centre model: flat hierarchies shorten decision-making processes and bring the organisation closer to customers and consumers.
- Take advantage of the Group's strengths:
 - ✓ Create efficiency advantages through common systems and processes and joint optimisation projects
 - ✓ Create know-how advantages with the functional Champion Model
- Continuous optimisation of production and process workflows.
- Continuous optimisation of product portfolios.

A snapshot of projects and measures under way

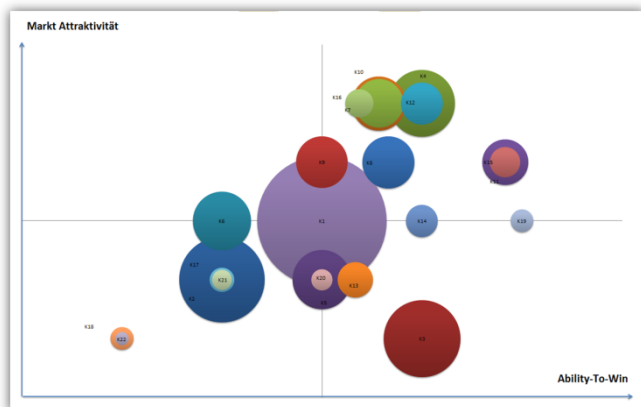
- Champion Model; Innovation, procurement, sales retail, sales food service, quality management, Web.
- Head of Supply Chain Excellence since Q2 2017.
- Digitalisation designated a priority topic for 2020: IT roadmap for every centre of competence.
- Operational footprint; closure of Churwalden plant; Rüti site integrated into Root site, transfer of production from Hildisrieden to site in Oberentfelden.
- Ongoing rollout of automated payment transaction system.
- Successful refinancing and issue of debut bond.

Steady value creation

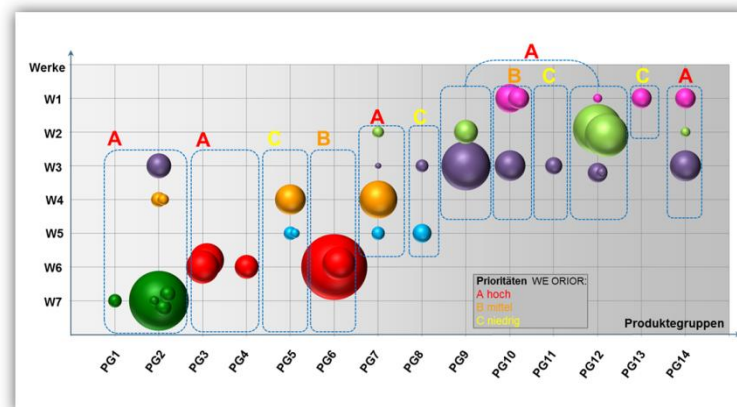


Agility and cost efficiency

Portfolio analysis



Operational footprint



Champion model



Cost and lean management



The ORIOR responsibility (sustainability)

- Sustainability is part of our core business and foundation of Excellence in Food.
- We embrace responsibility throughout the value chain.
- Sustainable procurement of raw materials, environmental responsibility and humane treatment of farm animals (animal welfare).
- Further reduction of food & non-food waste, energy consumption and wastewater at our production plants. Reduction of packaging for consumers.
- Continuous renewal of product range with products that have natural ingredients and no artificial additives, and recipes with reduced levels of sodium and sugar.
- Competent employees who constantly receive training and development.

A snapshot of projects and measures under way

- Sustainability Reporting with monthly measures, incl. food and packaging waste.
- Strengthening organic food competence thanks to Biotta.
- Realisation of GRI sustainability report started.
- Ongoing recipe management: e.g. Clean Label, etc.
- Procurement: Swiss raw materials, project “animal welfare without borders”.
- Responsible use of natural resources: Energy recovery projects, exemption received from Swiss carbon tax.
- Product range: reduce sodium and additives.
- Health management project incl. courses for supervisors.
- ORIOR Campus: new courses.

Steady value creation



The ORIOR responsibility (sustainability)

Quality down to the last detail



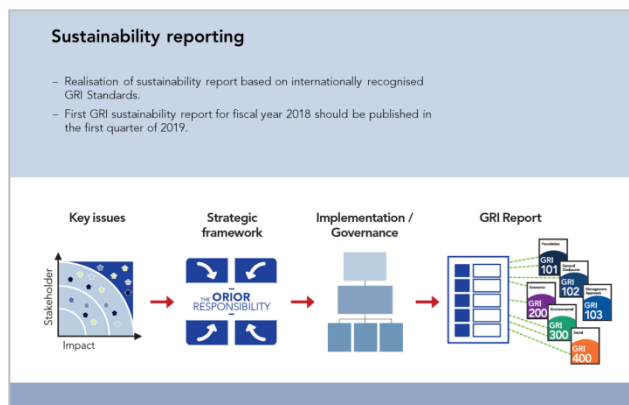
ORIOR Campus



Food Waste

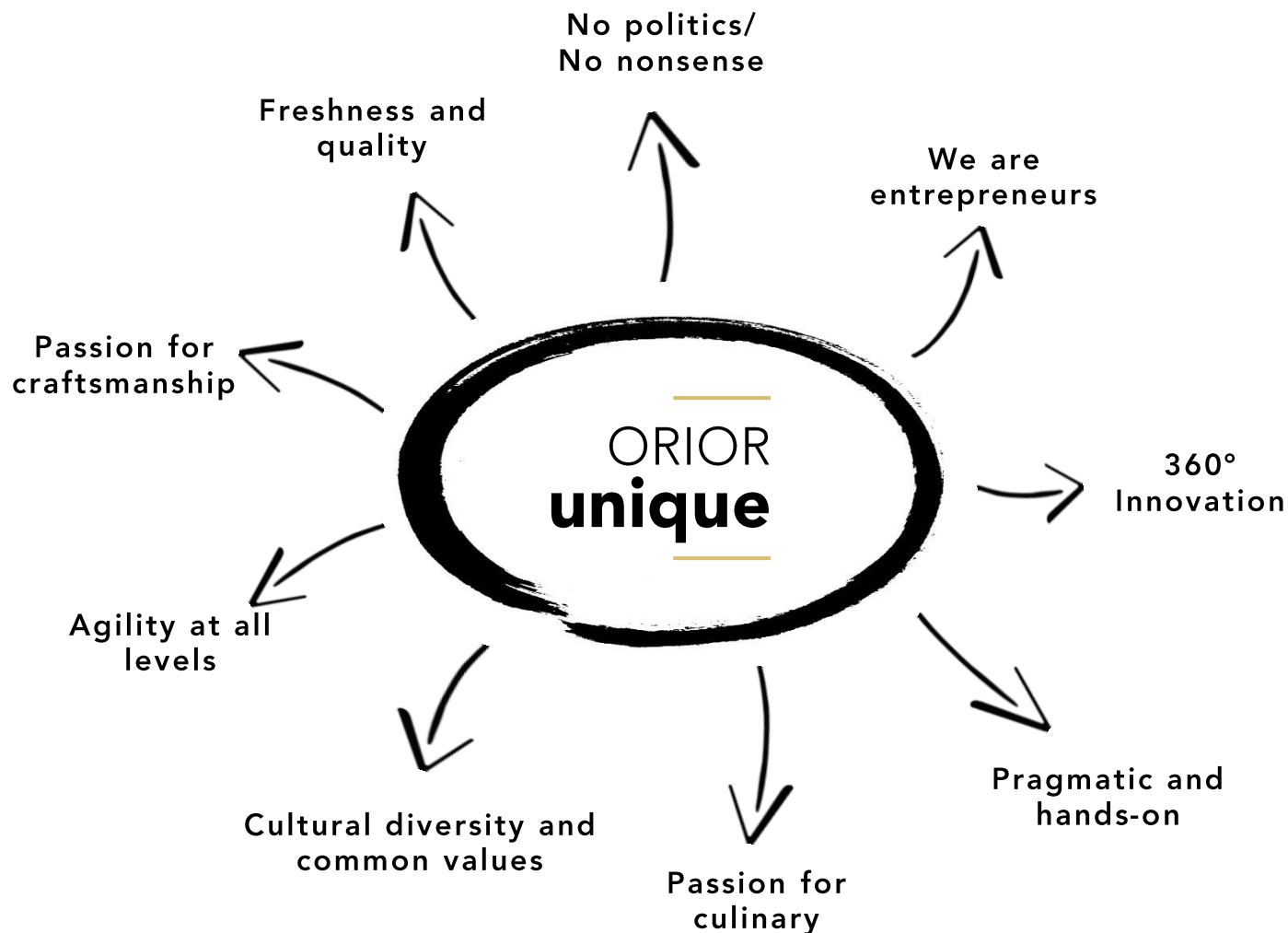


GRI report



We are ORIOR

Successful thanks to a unique and entrepreneurial spirit



Dynamic organisation

Competence centre philosophy, Champion Model & lean holding structure



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Outlook 2018

Environment

- Demanding markets, despite stabilization of market volumes.
- Raw materials and packaging materials prices still at high levels.
- High volatility: Meat prices, lower crop yields.
- Unrelenting stiff competition.

ORIOR Focus

- Steadfast implementation of initiatives and measures under the ORIOR 2020 strategy.
- Focus on innovation, concepts and services, ongoing brand-building efforts.
- Biotta: gradual integration into the various ORIOR Champion groups.

Outlook

- Good second half year expected.
- Slower growth rate versus H1.
- Further improvement in our operating performance and efficiency.



Accounting standard switched to Swiss GAAP FER

- BoD decided to switch accounting standard to Swiss GAAP FER as of the 31 December 2018 reporting date.
- Methods used to prepare the balance sheet and to value balance-sheet items will remain unchanged.
- The major changes will be the reporting of pension-fund liabilities and the treatment of intangible assets and goodwill.
- Upon adoption of the new accounting standard, total assets as of 31.12.2017 will amount to approximately CHF 343 m and the equity ratio to approximately 25%; equity is lower primarily due to the retro-active write-off of all intangible assets and the offsetting of goodwill against equity.
- A detailed transition report will be given with the 2018 accounts.
- Reason for the transition: increasing complexity of IFRS and the ensuing substantial administrative costs.



Impact on ORIOR's financial statements

Consolidated income statement

- Revenues: No impact
- EBITDA: Transaction costs, recognition of pension liabilities
- EBIT: Transaction costs, recognition of pension liabilities, amortization of intangible assets

Consolidated balance sheet

- Equity ratio: Offsetting of all goodwill against equity, effects from income statement (see above)

Consolidated cash flow statement

- No impact

Fiscal year 2017: Revenues by segment

in CHF million	Fiscal year 2017		
	Revenues Reported	IFRS 15 effect	Revenues Restated ¹⁾
ORIOR Group	585.5	−46.1	539.4
ORIOR Convenience	187.7	−7.4	180.3
ORIOR Refinement	290.2	−38.7	251.5
ORIOR International	124.7	0.0	124.7

1 Restated revenues by segment based on unaudited figures.

Our ambition:
Excellence in Food

We are **striving** for **uniqueness**
and offering **best quality**
in order to **surprise**
our **consumers** time and again
with **enjoyable**
food moments.























ORIOR business model

ORIOR is an **internationally operating Swiss food and beverage group** that combines craftsmanship with a pioneering spirit and is thriving on entrepreneurship and strong values.

ORIOR claims leading positions in attractive and growing **niche markets** with attractive **value creation potential**.

ORIOR's **decentralized** and **agile structure** allows to drive the market at the forefront with **innovative products, concepts** and **services**.

ORIOR has a **strong presence** in all **retail and food service** channels underpinned by long-standing **partnerships with customers**.

Convenience <i>Category pioneer</i>				Refinement <i>Strong heritage brands</i>			International		
Fredag	Le Patron	Pastinella	Biotta	Rapelli	Spiess	Möfag	Culinor	Gesa	Spiess Europe
									
									

ORIOR sites

ORIOR International



Culinor Food Group, Destelbergen
Chilled premium ready meals and meal components.



Vaco's Kitchen, Olen (BE)
Production of sous-vide products, chef meals and meal components.



GESA, Neuenstadt-Stein (DE)
Organic vegetable juices for food and beverage industry.



ORIOR / Spiess Europe
Distribution centre in Haguenau.

ORIOR Switzerland



Fredag, Root
Poultry specialities, convenience meat dishes and vegetarian/vegan.



Le Patron, Böckten
Pâtés and terrines, ready meals, meal components.



Pastinella, Oberentfelden
Fresh, filled and unfilled Italian-style pasta.



Biotta, Tägerwilen
Organic juices made from naturally grown fruits and vegetables.



Rapelli SA, Stabio
Charcuterie specialities like salami, prosciutto and coppa.



Albert Spiess, Schiers
Grisons specialities like Bündnerfleisch, Salsiz and cured ham.



Möfag, Zuzwil
Fürstenländer specialities such as Mostbröckli and hams.

Convenience (CH) – category pioneers



Fredag

- Pioneer and leader for vegan and vegetarian products
- Inventor and leader of tofu specialties
- Strong competence in meat and poultry convenience for retail and food service



Le Patron

- Inventor and innovation driver of ultra-fresh ready to eat meals
- High premium ultra-fresh pasta sold in Shop-in-shop concepts
- Pioneer and leader of pâtés and terrines



Pastinella

- Strong competence in filled and unfilled denaturing pasta production
- Leader in premium chilled pasta creations
- Inventor of gluten/lactose free chilled pasta and pasta ranges for dieters and people with food intolerances



Biotta

- THE Swiss organic pioneer
- All-natural organic vegetable and fruit juices and beverage specialties
- Strong concepts with well-known and highly trusted brands: Biotta, Vivitz, Traktor and C-Ice
- Very high culinary and quality standards



Refinement (CH) – strong heritage brands



Rapelli SA

- Modern character with a hint of history
- Mastri Salumieri
- Ticino Specialities
- Top-level brand awareness in Switzerland
- Since 1929

Albert Spiess

- The finest raw ingredients
- Bündnerfleisch = GGA brand article
- Pure mountain air and time-honoured tradition
- Highest-lying meat-curing facility in Europe
- Since 1906

Möfag

- Traditional Swiss recipes
- Cleanroom technology
- Innovative / flexible / customer oriented
- Handles small volumes very efficiently
- Time to market
- Since 1978



ORIOR International



Culinor Food Group

- Leading producer of ready-made meals and meal components serving retailers and food service providers throughout the Benelux region
- Strong platform for the entire European market
- Modern systems and processes with a variety of technologies

Gesa

- Premium vegetable juices and concentrates, pressed from freshly harvested vegetables
- Natural processing methods only
- Broad distribution network across Europe

Export

- Sales office ORIOR/Spiess Europe in Haguenau (F) serves as the export platform for distribution outside Switzerland
- Bündnerfleisch “Albert Spiess of Switzerland” is our most popular export product



Share information

Listing SIX Swiss Exchange
Security number 11167736
ISIN code CH011 1677 362
Ticker ORON
LEI 50670020184ZA17K9522
UID CHE-113.034.902

Share price on 17.08.2018 CHF 87.00

Dividend	2017	2016	2015	2014	2013	2012	2011
Dividend per share in CHF	2.17	2.09	2.03	2.00	1.97	1.95	1.93
Dividend increase vs. previous year in %	3.8	3.0	1.5	1.5	1.0	1.0	1.6

→ ORIOR's attractive dividend policy was confirmed in the ORIOR 2020 strategy and a steady increase in the absolute dividend in coming years is targeted

Stock information / data	30.06.18	30.06.17
Share price on 30.06. in CHF	85.20	76.20
High in CHF	88.40	86.00
Low in CHF	71.40	64.80
Market cap CHF million	555.3	451.5
Earnings per share in CHF	2.25	2.51
Operating cash flow per share in CHF	3.32	4.82
Shareholders' equity per share in CHF	51.61	42.93

Major shareholders (17.08.2018) ¹

Ernst Göhner Stiftung (CH)	10.46 %
UBS Fund Management AG (CH)	8.86 %
Schroders Plc (GB)	4.88 %
Rolf U. Sutter / Gruppe (CH)	3.07 %
Swisscanto Fondsleitung (CH)	3.28 %
Credit Suisse Funds AG (CH)	3.16 %

Calendar

04.03.19	Publikation of full year results 2018
11.04.19	Annual General Meeting 2019

¹ Detailed information on major shareholders is given on page 17 of the 2018 interim report.