



# THE INTEGRATED EDGE

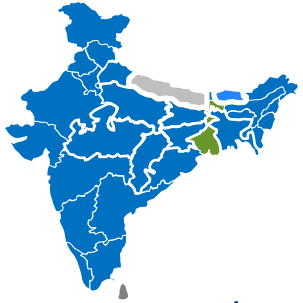
Solutions 2.0

 **Tetra Pak**<sup>®</sup>  
PROTECTS WHAT'S GOOD

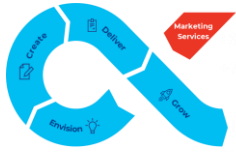


# Journey from Consumers to Market success

Customized approach to any opportunity / challenge across the value chain



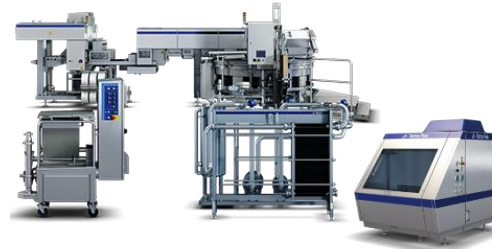
Consumer / Market



Opportunity / Challenge



Product innovation



Processing



Packaging



Services



High protein dairy



Low sugar juices



Differentiated ice Cream



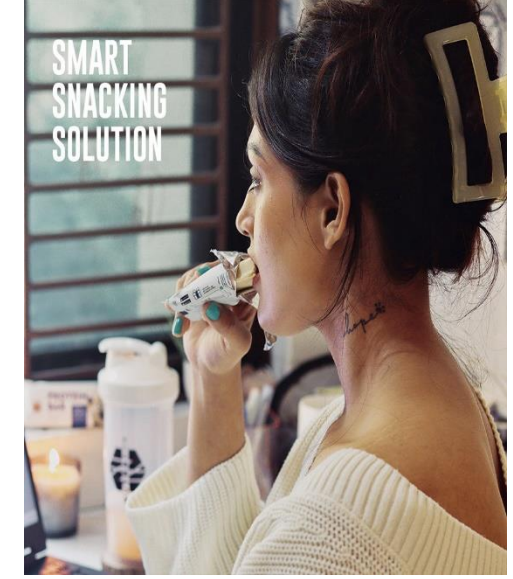
Affordability and Efficiency



# A Better me – Makes me feel and look good

**55%**

Indians inclined to lead an Active Lifestyle



**PROTEIN** associated with Fitness and Energy



**High protein content**

biggest purchasing motivators across food & beverage



# High protein becoming mainstream

Brands offering smart solutions with high protein for easy incorporation in diets

# 35%

Millennials find Ready-to-drink (RTD) protein beverages appealing

# 200+

Launches in beverages in last 2 years





# Key challenges in producing RTD High Protein Dairy

Consistent quality & taste in the right on-the-go package is imperative

## Challenge 1 : Foaming



Product losses  
and downstream  
downtime

## Challenge 2 : Protein degradation



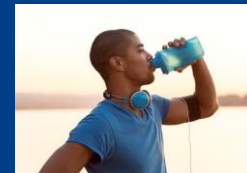
Due to high  
heat load along with  
loss of nutrients

## Challenge 3 : Right range of Flavors



Need for flavor range  
to mask taste of protein  
and widen appeal

## Challenge 4 : On the go consumption



Need for package  
with high functionality  
and drinking experience



# High protein line for consistent product quality and taste

Reduces product losses and increase runtime of downstream equipment



Milk Silos



Blender



UHT Sterilizer



Aseptic Tank

Protein Mixer



Annual savings of **INR 2.5 Cr (276 K €)**



# Tetra Pak® A3 Compact Flex for on-the-go packs with high functionality

Quick change across 3 sizes + Underfilling + Particulates capability

Tetra Prisma® Aseptic Edge –  
Prismatic shape & Enhanced drinking experience

Tetra Brik® Aseptic Edge –  
Simply Smart



Tetra Pak® A3 Compact Flex

200 ml

250 ml

300 ml

200 ml

250 ml



# Functional Care – My basic need of internal well-being

**87%**

Indian food choices driven by desire for good nutrition



Excessive **SUGAR** intake being linked to negative impact on health



**55%**

Urban Indians open to Packaged Products with 25%-75% Less Sugar





# Regulatory push to drive consumer awareness on sugar

Increasing launches of low sugar variants across F&B categories

Business Standard · 4d

Nestle launches Cerelac variants with no refined sugar in Indian market



**Sweet truth: In a first, ICMR proposes fresh dietary guidelines to limit sugar levels in packaged foods and beverages**

**FSSAI to mandate salt, sugar, and fat labelling on packages in bold, bigger font**



Energy

Sugar

Fats

Salt

Protein

Fiber





# Key challenges in producing Low Sugar juices

Controlled Sugar reduction without loss of nutrients is key

## Challenge 1 : High natural sugars



To reduce both added and natural occurring sugar

## Challenge 2 : Sensitive Nutrients



To retain the natural nutrients in juice while reducing sugar

## Challenge 3 : Lost in the clutter

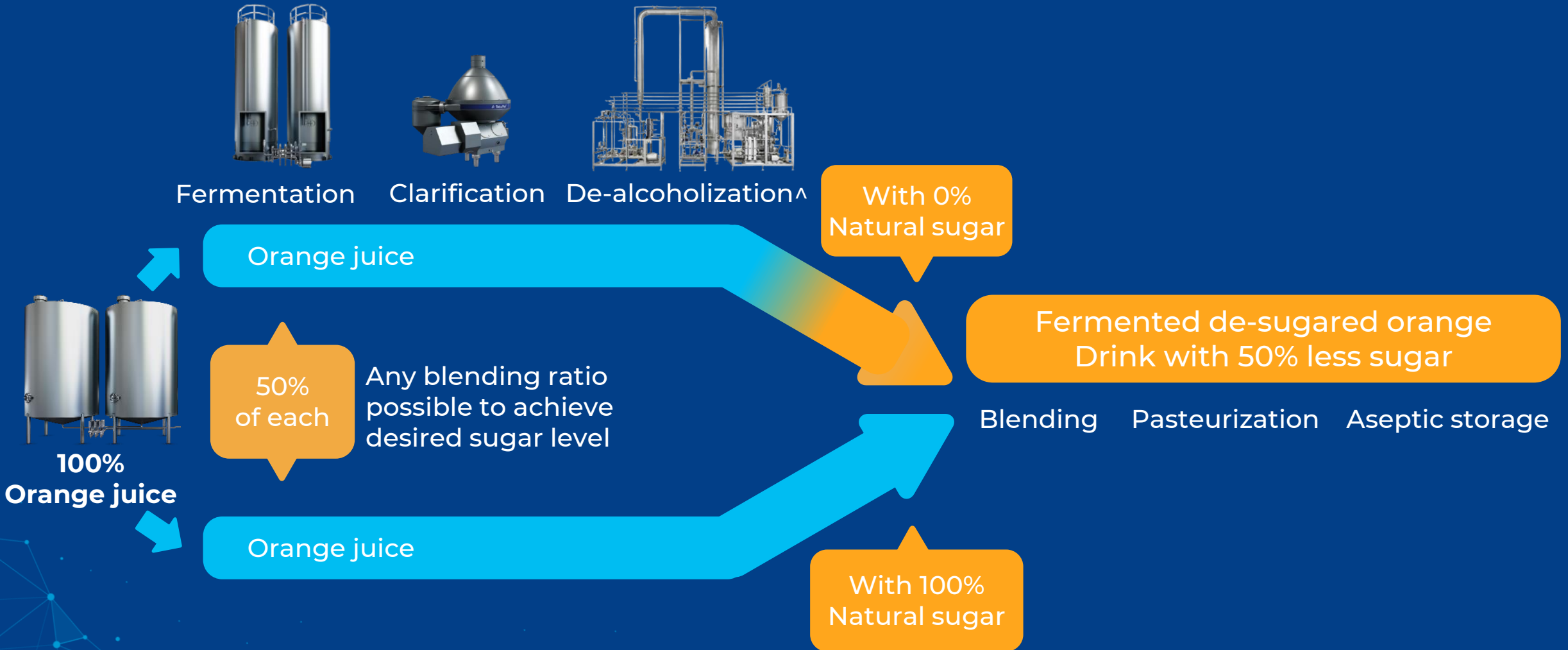


Stand out on shelf to gain noticeability & trials from consumers



# De-sugared technology to reduce natural sugars as well

Same nutrients and vitamins content as conventional juices



<sup>^</sup>Subject to regulatory approval



# A3 Flex Filling machine with clutter breaking differentiation

Quick change + Robust caps with One step opening + Particulates capability

Tetra Stelo® Aseptic Edge –  
All round experience

Tetra Brik® Aseptic Ultra  
Edge – Tall and Ultra Smart

Tetra Prisma Aseptic –  
Prismatic shape & Easy to pour



500 ml 1 L



500 ml 750 ml 1 L



500 ml 750 ml 1 L

A3 Flex Filling machine



# Self-rewarding Indulgence – Enjoy and satisfy my craving



New chunks & textures and signal indulgent experience



**44%**  
of Indian Consumers prefer ice cream for treating themselves



# Key challenges facing ice cream industry today

Differentiated product experience amidst increasing cost of cold chain

## Challenge 1 : Need for Novelty



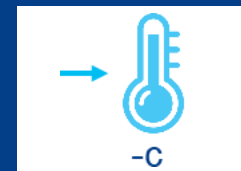
Ice Cream with different types of chunks and textures

## Challenge 2 : Manual tub filling



Product loss with overall and cost of manpower

## Challenge 3 : Expensive cold chain

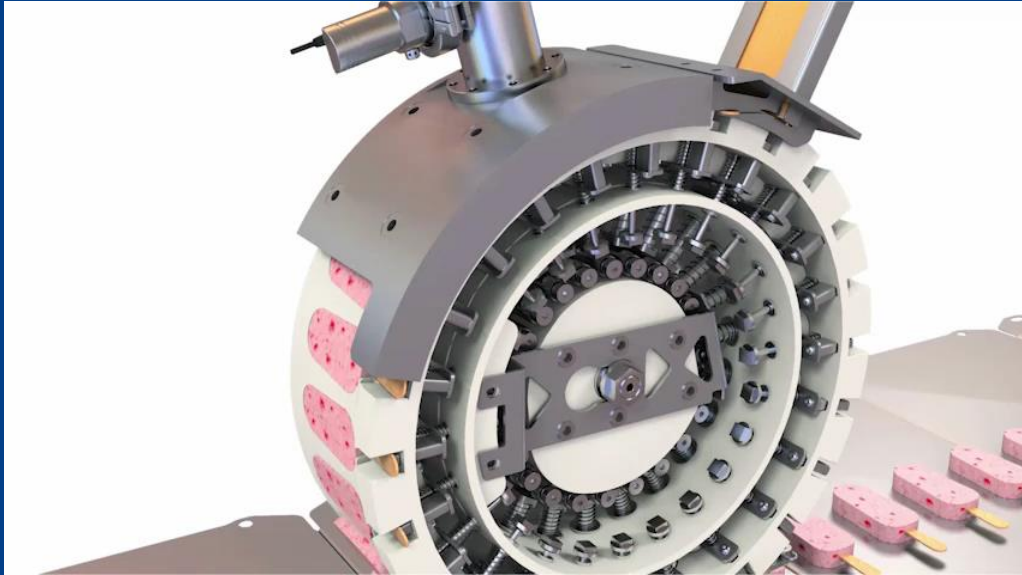


Barrier to entering the category and expanding distribution



# Tetra Pak® Extrusion wheel for large inclusions

Driving efficiency and accuracy with Tetra Pak® Robot Filler



Inclusions size up to **25 mm**

Retrofittable on existing lines



Prevent losses from overfilling by **70%**

Saves manpower by at least **1 person**



# Ambient distribution and chilled consumption of ice cream

Wide variety of ice lollies with long shelf life – without cold chain distribution

## Tetra Pak® A1 filling machine



# 9,800

packs per hour

Underfilling possibilities

Flexibility to bypass MiM

## Tetra Fino® Aseptic 100 ultra with Micro Injection Moulding (MiM)



Dairy based



Juice based



Water based



Yogurt based



Plant based





# Snacking time – Enjoy small moments and reload during the day

# 79%

Indians prefer small portions of indulgent snacks



Almost 30% of our business comes from small packs that operate at magic price points



# ~ 15 bio

Non-carbonated beverages portion packs consumed by masses in South Asia (2024)



# Key challenges in growing mass portion packs

Continuous optimization of Total Cost of ownership

## Challenge 1 : Fixed Consumer price



Constant strive for  
Operational cost  
reduction

## Challenge 2 : Limited real estate



Constraining capacity  
expansion to meet  
demand

## Challenge 3 : Need for mass appeal



Scaling up across  
multiple consumer &  
price segments



# Conventional beverage production line

25% juice concentrate mixed with 75% of water is pasteurized together



Pasteurization of the entire product stream



# Sustainable beverage production line

Savings in Energy & Water consumption with pasteurization of only juice



25%  
Juice



Tetra Pak®  
high shear mixer



Premix  
tanks



Tetra Pak® In-line  
blender B



Tetra Pak®  
pasteurizer B



Tetra Pak®  
aseptic tank LV



75%  
Water



Tetra Pak®  
water treatment unit FUV

Upto **67%**  
Energy reduction

Upto **50%**  
Water consumption  
reduction

**Only pasteurizes concentrate stream**



# High speed lines driving reduction in Total Cost of Ownership (TCO)

Range of packs with closures & straws – catering to different price segments



Tetra Pak® E3 Speed/Hyper Filling machine



250 ml 200 ml 150 ml 125 ml Next

**40,000**

Packs per hour speed

**66%** more

Capacity in similar footprint

E-Beam sterilization -  
Good for planet



Tetra Pak® A3 Speed Filling machine



250 ml 200 ml 200 ml 200 ml

High speed line for portion packs with **closures**

Underfilling possibilities



# TCO reduction through usage of Maintenance units

Reduction in maintenance time resulting in extra output from line

## MU Assemblies

**A3/S**

Jaw



✓ Increase Uptime

✓ Secured Quality

✓ Vertical Startup

✓ Lower Cost

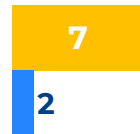
**A3/S**

FFU  
Station Chain



**A3/S**

Peroxide  
Pump



 **Total Downtime**  
by parts ( hrs)

 **Total downtime**  
by MU ( hrs)

**Upto 1.5** Million more  
packages / machine per year



# Solutions 2.0 with the Integrated edge

From Consumer demand space to 4 Big opportunities to Solutions 2.0

A Better me



High Protein Dairy

Functional Care



Low Sugar Juices

Self rewarding indulgence



Differentiated Ice Cream

Snacking time

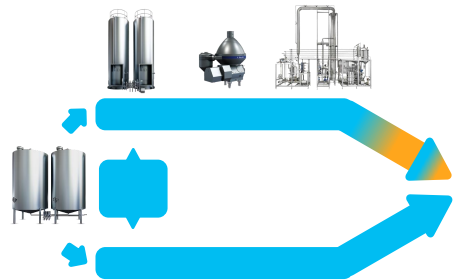


Affordability and Efficiency



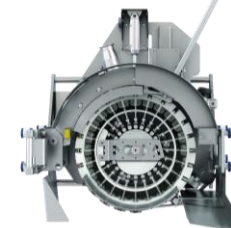
Protein Mixer

Tetra Prisma® Aseptic 200/250/300 Edge



Desugared Juice line

Tetra Brik® Aseptic 500/750/1000 Ultra Edge



Extrusion wheel



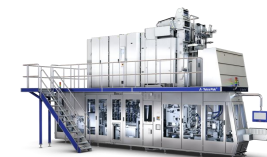
Tetra Pak® Robot filler



Tetra Fino® 100 Ultra MiM



Sustainable Beverage line



Tetra Pak® E3 Speed/Hyper



Maintenance unit

Innovation starts here.



# From Solutions 2.0 to Tasting the Future



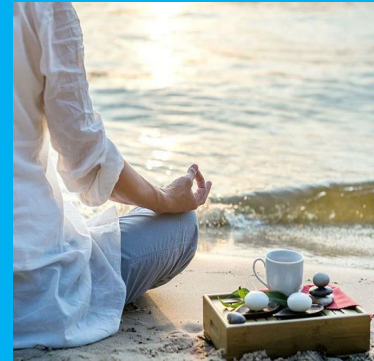
**A BETTER ME**



**High Protein**  
Milkshake –  
Mixed berry



Plant Based **High Protein** shake -  
Chocolate



**FUNCTIONAL CARE**



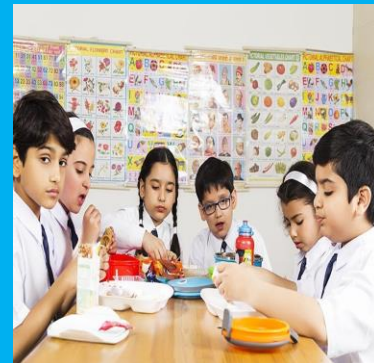
- Juice with  
Reduced Sugar
- Grape (50%)
  - Apple (50%)
  - Orange (30%)



**SELF-REWARDING INDULGENCE**



Pista **Kulfi**



**SNACKING TIME**



**Millet**  
Milkshake



**Probiotic Lassi –**  
Peach flavored





# Solutions 2.0 with the Integrated edge

From Consumer demand space to 4 Big opportunities to Solutions 2.0

A Better me



High Protein Dairy

Functional Care



Low Sugar Juices

Self rewarding indulgence



Differentiated Ice Cream

Snacking time

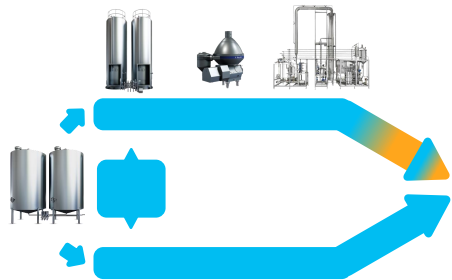


Affordability and Efficiency



Protein Mixer

Tetra Prisma® Aseptic 200/250/300 Edge



Desugared Juice line

Tetra Brik® Aseptic 500/750/1000 Ultra Edge



Extrusion wheel



Tetra Pak® Robot filler



Tetra Fino® 100 Ultra MiM



Sustainable Beverage line



Tetra Pak® E3 Speed/Hyper



Maintenance unit

Innovation starts here.

# Integrated Edge

Tetra Pak®  
Global Specialist