

## Business model

Devro sells premium collagen products both directly to food manufacturers and, in some markets, through local distributors. We sell to over 1,000 customers in more than 100 countries.

### OUR MARKET POSITION

Devro is one of a few significant producers of collagen casing with a global footprint/reach. Approximately one-third of Devro's sales are in emerging markets and two-thirds are in developed markets.

Devro has a No.1 market position in many countries.

### OUR COMPETITIVE ADVANTAGE

Devro differentiates itself from competitors by developing innovative new products, by working closely with customers to enhance manufacturing efficiencies and by providing high-quality technical support to customers.

We can also offer support to our customers to innovate.

### KEY DIFFERENTIATORS

#### Customer intimacy

Having pioneered the conversion from gut to edible collagen casing, Devro has established intimate customer relationships both directly and through our global distributor network. We add unique value on the ground to strategic and key customers through our widespread local sales and technical applications support staff.

#### Our people

Devro employs over 2,100 people, with skills and knowledge ranging from chemical and electrical engineering to food technology, meat science and environmental health. Over 100 Devro employees work in customer-facing operations as sales and technical advisers.

#### Global reach

Devro has plants on four continents. This enables us to provide class-leading service to our global customer base.

#### Technology

Over the past 10 years we have made significant investments to upgrade our manufacturing facilities.

## WHAT WE DO



# EXTRACT

#### Extracting collagen

Collagen used for casing and gel is taken from the hides of carefully selected animals.



# REINVEST

#### Reinvesting in our business

Devro invests in applied research and development and in a phased and disciplined capital programme, supporting the growth ambition.





## INNOVATE

### Applied technology

The production of collagen casing is a complex technological process. Devro combines 85 years of expertise and innovation to produce edible casings that allow our customers to offer a variety of sausages that are adapted to local consumer needs.

### Manufacture

Devro is a world leader in the manufacturing technology of a highly sophisticated process. Our edible casings are consistent and reliable to suit the needs of both sausage manufacturers and consumer preferences.

## SELL

### Sales, marketing and distribution

Devro products are sold in over 100 countries across all continents. We sell directly to food manufacturers and via agents and distributors.

### Customer products to consumers

Devro's innovation and casing performance allow our customers to produce differentiated sausage products for the consumer. Our casing consistently scores highly for appearance, colour, bite and overall acceptance in independent research and consumer testing.