



NONWOVEN

GROWING YOUR BUSINESS OPPORTUNITIES

FOR YEARS TO COME

DECEMBER 2022

ANDRITZ

ENGINEERED SUCCESS

CHAPTER OVERVIEW



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THE ANDRITZ GROUP



ANDRITZ is a globally leading supplier of plants, equipment, systems, and services for the pulp and paper industry, the metalworking and steel industries, hydropower stations, pumps, solid/liquid separation in the municipal and industrial sectors as well as for animal feed and biomass pelleting



GLOBAL PRESENCE

Headquarter
**GRAZ,
AUSTRIA**

Production sites and service/
sales companies worldwide:
OVER 280

REVENUE BY REGION 2021



KEY FINANCIAL FIGURES

	UNIT	Q1-Q3 2022	2021
Order intake	MEUR	7,451.0	7,879.7
Order backlog (as of end of period)	MEUR	10,822.2	8,165.8
Revenue	MEUR	5,207.8	6,463.0
Net income (including non-controlling interests)	MEUR	262.3	321.7
Employees (as of end of period; without apprentices)	-	27,925	26,804

A WORLD MARKET LEADER WITH FOUR BUSINESS AREAS



- Equipment for production of all types of pulp, paper, tissue, and board
- Boilers for power generation
- Flue gas cleaning systems
- Plants and equipments for the production of nonwovens and absorbent hygiene products (AHP)
- Recycling and shredding solutions



- Presses/press lines for metal forming (Schuler)
- Systems for production of stainless steel, carbon steel, and non-ferrous metal strip
- Industrial furnace plants



- Electromechanical equipment for hydropower plants (turbines, generators)
- Pumps
- Turbo generators



- Equipment for solid/liquid separation for municipalities and various industries
- Equipment for production of animal feed and biomass pellets

„WE CARE“ - THE ANDRITZ ESG PROGRAM



Sustainability has always been an integral part of ANDRITZ's corporate policy

It is a decisive factor in order to be successful in the long-term and is an important element of the company's corporate policy and strategy

OUR ESG VISION

We are amongst the best in class regarding sustainability in the markets we serve and we create maximum value added for all our stakeholders.

As a leader in sustainability, we focus on responsible corporate governance and on ensuring a safe and viable future for society, our employees, and all other stakeholders as well as on creating sustainable and durable products that contribute towards conserving natural resources and protecting the environment and climate.





WHAT WE WANT TO ACHIEVE: OUR ESG GOALS AT A GLANCE

ENVIRONMENTAL

- Reduce green house gas emissions by **50%** until end of 2025
- Reduce waste volume by **10%** until end of 2025
- Reduce water consumption by **10%** until end of 2025
- Increase revenue from sustainable solutions and products to over **50%** until end of 2025



SOCIAL

- Reduce annual accident frequency rate (>1 day's absence) by **30%** compared to the preceding year
- Increase the proportion of women in the workforce
- Reduce fluctuation rate due to voluntary departures to **5%** by the end of 2022



GOVERNANCE

- Audited suppliers by 2025* **85%** of procurement volume
- Implement and continuously monitor **highest corporate compliance standards**
Goal: no infringements
- Detect company risks at an early stage
Goal: no event-driven profit warnings



* Accumulated external purchasing volume from suppliers with an annual purchasing volume of over 250,000 EUR and who are audited using the standardized, online Supplier Relationship Management tool

SAFETY AT ANDRITZ



We strive for **ZERO ACCIDENTS**

OVER THE PAST YEARS

AFR* reduced
BY APPROX. 30%
(every year)

TARGET 2022

Reduce the AFR*
BY FURTHER 30%
(AFR 2021: 3.1)

**TAKE GOOD
CARE OF
YOURSELF!**

We are **constantly improving** and **monitoring** our safety performance



MEDIUM-TERM GOAL

- have all employees working under ISO 45001 certification
- get them comprehensive safety training



ANDRITZ NONWOVEN

OUR MISSION, VISION, AND VALUES



„We love what we do and we do everything to make sure that our customers succeed“

ANDRITZ

ENGINEERED SUCCESS

OUR MISSION

We drive the success of our customers through **innovative and quality engineering and services**, and we form strong and sustainable relationships – with a positive impact for the **nonwoven and textile** industries and for the planet. The world keeps changing, our passion stays the same.

OUR VISION

In our nonwoven (disposable and durable) and textile recycling markets, we are **global leaders with a passion for innovative engineering solutions**. As technology and quality leader, we create sustainable value for our customers and shareholders, thus ensuring the continuation of our long-term profitable growth.

OUR VALUES

We at ANDRITZ all share the same core values that define how we act and what we stand for.



Passion



Partnership



Perspectives



Versatility

ANDRITZ, a global leader in passionate and innovative engineering

OUR CORE BEHAVIORS



CUSTOMER FOCUS



OWNERSHIP FOR
PERFORMANCE



SHARED
COMMITMENT



OPENNESS



„The core behaviors are the visible expression of our values“

ANDRITZ Nonwoven management team



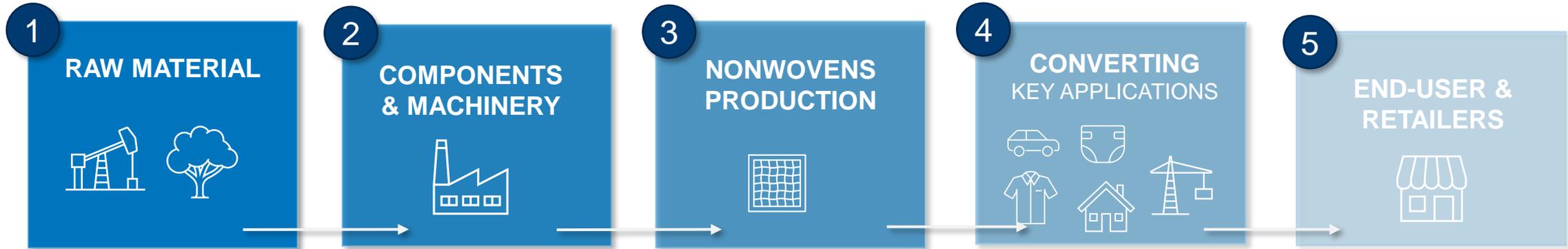
“We are one division fully committed to the nonwovens industry – from the raw material up to converting.”

Andreas Lukas, Senior Vice President and Division manager at ANDRITZ Nonwoven

ANDRITZ NONWOVEN



Nonwoven industry value chain and ANDRITZ involvement



RAW MATERIALS

Man-made staple fibers
 Man-made filaments, filament yarns
Natural fibers
Recycled fibers
Pulp
 Polymers chips or granule
 Biopolymers
 Additives & surface treatment
 Binders (latex, foam)
 Adhesives
Tissue papers
 Waddings suppliers

COMPONENTS

Film Membrane
 Medical film
 Closure systems, tapes, elastics
 Scrim and other reinforcement
 Plastic nets
 Release Papers (e.g. siliconized)
 Superabsorbent powders

MACHINERY

Machinery Nonwovens
Machinery Converters
Waste handling equipment - production waste
Post-consumer waste recycling
 Manufacturing auxiliary equipment
Online monitoring and inspection system
 Testing equipment and apparatuses

NONWOVENS PRODUCTION

Drylaid - Carded
Drylaid – High Loft
Wetlaid/Wetlace
Airlaid
Spunlaid/ Spunbond SMS/SMMS/...
Meltblown
 Fibrillated or **perforated film**
 Other structures

CONVERTERS KEY APPLICATIONS

Abrasives	Graphical & printing
Agriculture/Horticulture	Home furnishing
Automotive	Hygiene
Bed and table linen	Interlinings
Building	Medical / surgical
Composites/laminates	Packaging
Electric/Electronics	Shoe / leather
Filtration (air & liquid)	Sorbent products
Floor & beverage	Transportation
Garments	Waddings
Geotextiles & civil engineering	Wipes

- Machinery supply of ANDRITZ Nonwoven
- Raw materials where ANDRITZ Nonwoven machinery is involved
- Nonwovens production with ANDRITZ Nonwoven machinery
- Applications where ANDRITZ Nonwoven machinery is involved

ANDRITZ NONWOVEN



“One division fully committed to the nonwovens industry – from the raw material up to converting”

ONE OF THE WORLD’S
leading nonwoven and textile
machinery and line supplier

WIDE RANGE OF TECHNOLOGIES

Spunbond, Spunlace, Needlepunch,
Air-through bonding, Wetlaid/Wetlace,
Textile recycling, Airlay, Converting

4 TECHNICAL CENTERS



within ANDRITZ for
continuous innovation
and developments

>120 YEARS OF EXPERIENCE
in nonwoven and textile

~ 800 EMPLOYEES
worldwide



> 10% AAGR
Since 2011



3 RESEARCH CENTERS
equipped with ANDRITZ
machinery at CETI, STFI,
and NWI

11 LOCATIONS
worldwide



STRONG FOCUS ON
Sustainability & Environment
Long-term partnership
Continuous research & development

MEMBER OF
EDANA, INDA, VDMA,
BCH, CNITA



ANDRITZ NONWOVEN MIDTERM GOALS AT A GLANCE



CUSTOMER SATISFACTION
AND CLOSE PARTNERSHIP



LIFE-CYCLE SUPPORT WITH
A STRONG GLOBAL SERVICE
ORGANIZATION

STABLE GROWTH WITH A
STRONG FOCUS ON
INNOVATION AND
DIGITALIZATION



INCREASE REVENUE FROM
SUSTAINABLE SOLUTIONS
AND PRODUCTS

To over 50% until end of 2025

LEADING SUPPLIER
IN TECHNOLOGIES PROCESSING
SUSTAINABLE RAW MATERIALS



REDUCE ANNUAL ACCIDENT
FREQUENCY RATE
(> 1 day's absence)

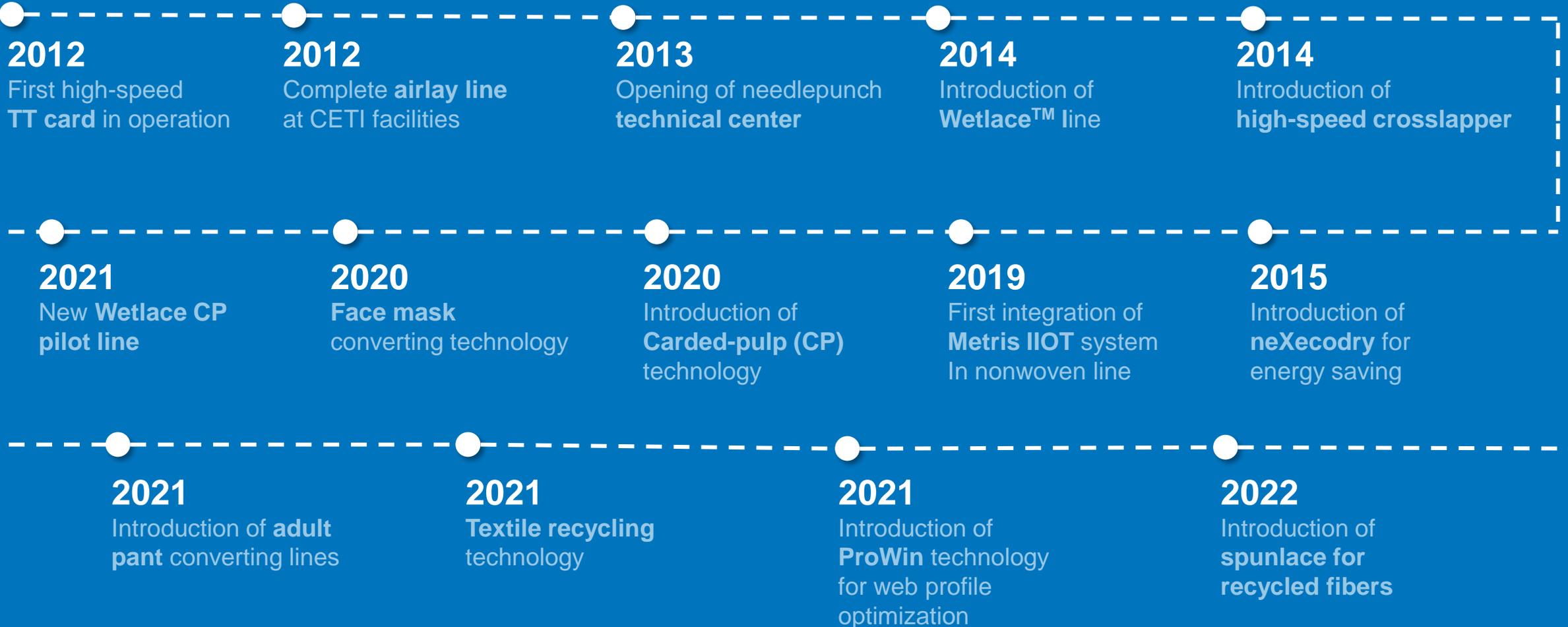
Goal: Zero accidents

LEADING SUPPLIER IN
TEXTILE RECYCLING
FROM SORTING TO FIBERS



SUSTAINABLE EMPLOYER WITH
A MULTI-CULTURAL APPROACH

TECHNOLOGY HIGHLIGHTS OF THE LAST 10 YEARS





OUR STORY - COMMITTED TO THE NONWOVENS INDUSTRY

The way to complete nonwoven processes and a global service network





FULL RANGE OF CAPABILITIES TECHNOLOGIES AND PRODUCTION LINES

MACRO DRIVERS IN NONWOVENS INDUSTRY

A constant growing market

ECONOMIC FORECAST

- China's growth and ambitious goals MIC25 (decoupling process)
- Trade protections and policy uncertainty in some regions
- The rising level of GDP per capita globally
- Global political uncertainties

DEMOGRAPHIC TRENDS

- Global population growth is slowing, as is the absolute number babies born
- The increasing total population of the elderly
- Urbanization

INDUSTRY TRENDS

- Sustainability (products, resources, waste, energy, consumption, etc.)
- Circular economy, shift from disposable to reusable or recyclable
- Shift from global to more regional supply chains
- Consolidation



ANDRITZ NONWOVEN



One division fully committed to the nonwovens industry – from the raw material up to converting



“We’re here to give you support in every aspect of your nonwovens production from low to high capacities. You benefit from the most advanced expertise and complete solutions for disposable and durable applications.”

Tobias Schäfer, Vice President Sales, ANDRITZ Nonwoven

ANDRITZ NONWOVEN



One division fully committed to the nonwovens industry – from the raw material up to converting



We're here to give you support in every aspect of your nonwovens production from low to high capacities. You benefit from the most advanced expertise and complete solutions for:

SPUNLACE

AIR-THROUGH-
BONDING

FINISHING
LINES

NEEDLEPUNCH

AIRLAY

DECORTICATIO/
COTTONIZING

Technologies for disposable products

Technologies for durable and textile products

WETLACE /
WETLACE CP

SPUNLAID /
CALENDER

CONVERTING

WETLAID

TEXTILE
CALENDERS

TEXTILE
RECYCLING

EXCEED MARKET SPEED WITH SPUNLACE



ANDRITZ neXline spunlace

- Complete production lines incl. opening/blending, carding, crosslapper (for technical products), hydroentanglement, dewatering, drying, winding and slitting/re-winding
- Leading and experienced supplier for complete spunlace production lines for premium to market entry solutions
- All types of raw materials – natural or synthetic can be used
- Wide range of end-products – baby, cosmetics, household wipes, technical and hard surface wipes, medical and surgical, facial masks, etc.



LET YOUR INVESTMENT FLOW BACK WITH WETLACE



ANDRITZ neXline wetlace

- Complete production lines incl. stock preparation, forming, hydroentanglement, drying
- The original ANDRITZ Wetlace™ technology combines wet forming/laying and hydroentanglement for the production of sustainable wipes
- All types of raw materials – natural (incl. pulp) or synthetic can be used
- Wide range of end-products – dispersible wipes, biodegradable wipes, composite wipes, industrial wipes



SUSTAINABLE FUTURE WITH WETLACE CP



ANDRITZ neXline wetlace CP (carded-pulp) for the production of bio-based wipes

- Complete production lines incl. stock preparation, wetlaid forming, opening/blending, carding, hydroentanglement, drying
- Cost-efficient, flexible and reliable process, which combines the benefits of Wetlace™ and spunlace technologies perfectly
- Great expertise in processing wood pulp as raw material and a large installed base for pulp production lines
- Wide range of end-products – biodegradable wipes such as baby wipes, personal care wipes, disinfection wipes, cleaning wipes, and more

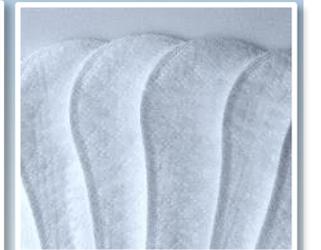


GET INTO CARE BUSINESS WITH AIR-THROUGH BONDING



ANDRITZ neXline air-through bonding

- Complete production lines incl. opening/blending, carding, bonding, winding and slitting/re-winding
- Vast expertise in a wide range of hygiene nonwovens technologies for web forming and finishing
- Bi-component fibers are used for this process
- Wide range of end-products – top sheets, ADL and back sheets for baby diapers, adult incontinence, fem care



BE ON TOP OF THE SPUNLAID RACE



ANDRITZ neXline finish - from bonding to finishing

- Complete lines from bonding to finishing incl. calenders, spunjet, low-add on and dryers
- Highest capabilities, reproducibility, reliability and efficiency
- Over 60 years of experience and more than 600 nonwovens calenders in operation worldwide
- State-of-the-art Hot S-Roll technology
- Wide range of end-products – hygiene (baby diapers, adult incontinence, fem care), medical, filtration, geotextiles and roofing



ADDING VALUE TO NONWOVEN WITH FINISHING LINES



ANDRITZ finishing solutions

- Low add-on for hygiene applications with the neXkiss kiss-roll applicator and perfect impregnation with the neXchem padder
- Improved product properties, manifold functionalities, and significant added value
- Finishes: hydrophilic, permanently hydrophilic, anti-static, alcohol repellent, flame resistant and many more
- Wide range of end-products – hygiene (baby diapers, adult incontinence, fem care) and medical



CONVERT IDEAS INTO PROFIT



ANDRITZ converting lines

- Complete converting lines for hygiene, food pads, lamination and face masks
- Our machines ranges from market entry to high capacities and are built with a modular frame concept that allows customized configurations
- Wide range of end-products – baby diapers, baby pants, adult diapers, adult pants, underpads, light Inco products, shaped pads, sanitary napkins, panty shields, food pads, lamination, medical products and face masks



INCREASE YOUR SUCCESS WITH NEEDLEPUNCH



ANDRITZ neXline needlepunch - state-of-the-art needlepunch lines for durable end-uses

- Complete production lines incl. opening/blending, carding, crosslapping, drafting, needling, thermobonding/calendering and end of line equipment
- Our needlepunch portfolio offers you premium and market entry technologies and enables you to produce exactly the fabric characteristics you want.
- Wide range of end-products – geotextiles, automotive, filtration, furniture, roofing felts, coating substrates, artificial and synthetic leathers, flooring, high-tech composite felts, ceramics, and more.



LET YOUR INVESTMENT FLOW BACK WITH WETLAID



ANDRITZ neXline wetlaid

- Complete production lines incl. stock preparation, forming, drying, winding and slitting/re-winding
- Years of development competence in the wetlaid sector and special expertise in the processing of glass fibers
- We provide you with concept and engineering know-how for complete glass fiber lines, where gentle fiber treatment is essential within stock preparation and the laying process
- Wide range of end-products – construction, building, roofing, carpet and ceiling tiles, filtration, battery separators



ONE STEP AHEAD WITH AIRLAY TECHNOLOGY



ANDRITZ airlay technology

- Complete production lines incl. blending line, pre- and fine opening, mat forming, mat consolidation with needling and/or thermobonding
- With close to a century of experience in the fine art of textile processes, we offer high quality, efficient and proven solutions
- Wide range of end-products – bedding, furniture, carpet underlay, horticultural, insulation, automotive, geotextile, filtration...



ADDED-VALUE WITH DECORTICATION / COTTONIZING



ANDRITZ decortication/cottonizing technology

- Complete processes for bast fibers opening and cleaning (hemp, flax, coco, jute...) preparing them for spinning as well as for nonwovens
- 60 years of experience in processing bast fibers
- Technical center to demonstrate and optimize the process for your specific needs
- Soft process for high quality fibers for technical and/or spinning applications.



RECYCLE TEXTILE WASTE INTO PROFIT



ANDRITZ recycling technology

- Complete soft and hard waste recycling processes for re-spinning and nonwovens production
- Leading supplier in textile recycling with almost 100 years of experience in this field
- Wide range of end-products – woven and knitted products within the textile sector, and automotive, technical nonwovens, building insulation, bedding, furniture, etc. for the nonwovens area



KEEP YOUR PROFITS ROLLING WITH TEXTILE CALENDERS



ANDRITZ teXcal calender range – more than 150 years experience

- Our textile calender portfolio ranges from two-roll calenders to three-roll calenders to special configurations designed precisely to meet your needs
- State-of-the-art deflection-controlled roll technology with the renowned S-Roll and Raconip piston-controlled rolls
- Effects such as soft handle, gloss, air permeability or absolute flatness
- Wide range of end-products – home textiles, clothing, technical textiles, denim, African damask, and more





FULL RANGE OF CAPABILITIES RESEARCH AND DEVELOPMENT

ANDRITZ NONWOVEN



One division fully committed to the nonwovens industry – from the raw material up to converting



“Continuous research and development targeting customer needs is key in an increasing demanding market. Ensure a fast, profitable and sustained ROI based on decades of experience and expertise, is our daily aim to serve our customers investment benefit.”

Didier Vulliet, Vice President Technology, ANDRITZ Nonwoven

FULL RANGE OF CAPABILITIES



Technology

INNOVATION IS PART OF OUR DNA

Benefit from:

- Developments that optimize nonwoven processes, cut energy costs, and add value to your production
- More than 100 granted patents
- Close collaboration with international institutes, professional associations and universities
- Highly skilled engineers for full support for customers
- Highly professional product management, commissioning and start-up



FULL RANGE OF CAPABILITIES



Technology - Innovation is a part of our DNA

STATE-OF-THE-ART TECHNICAL CENTER

- Covering the main nonwoven technologies and nonwoven processes
- Forming technologies: Drylaid, wetlaid, composites
- Bonding technologies: Spunlacing, needlepunching, calender bonding, air-through bonding
- Finishing: Kiss roll, foulard, calender, hydro-patterning
- Airlay, bast fiber process and textile recycling

Open to ANDRITZ customers for their own R&D and products development

- From raw materials to finished rolls of nonwoven fabrics
- Excellent correlation with real industrial production conditions (speeds, basis weights, machines format)





FULL RANGE OF CAPABILITIES OPERATIONS

ANDRITZ NONWOVEN



One division fully committed to the nonwovens industry – from the raw material up to converting



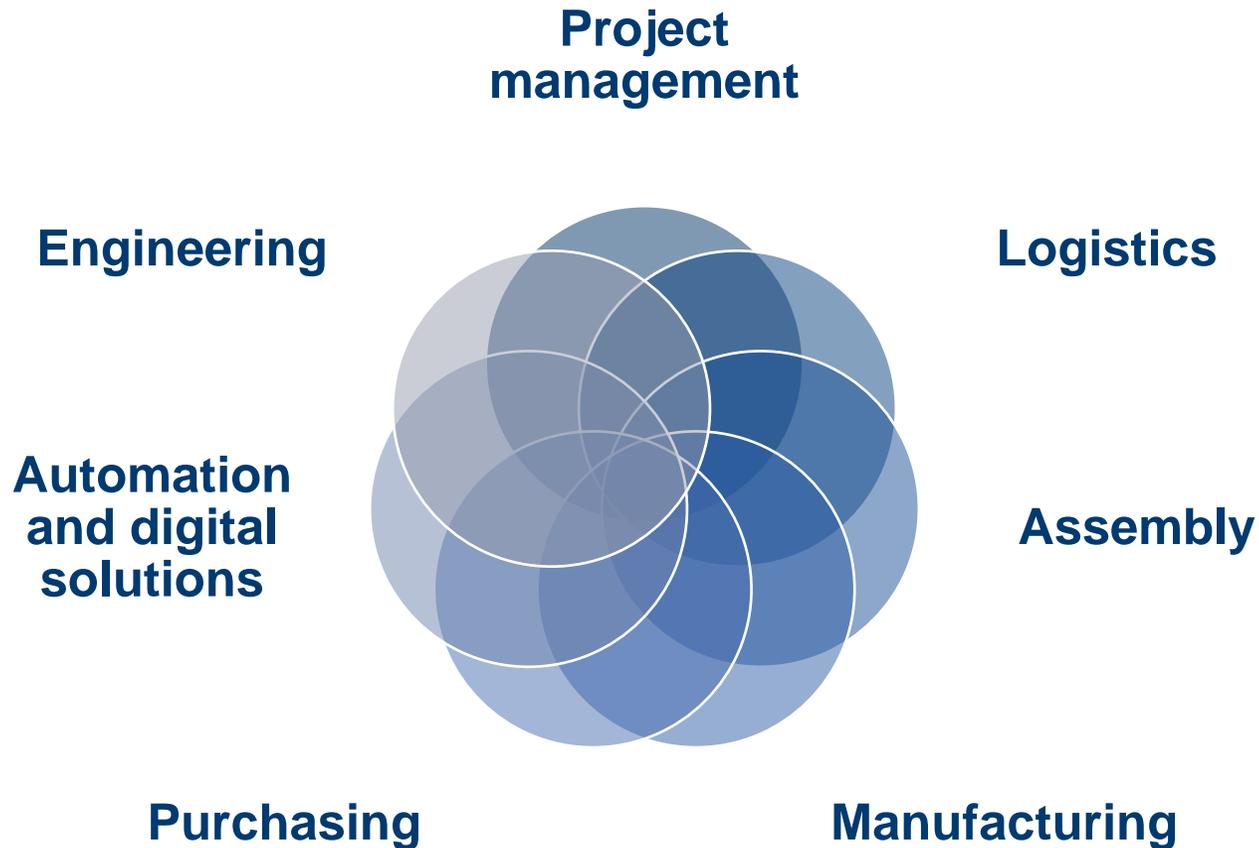
“Our mission in operations is to deliver on time and on budget to satisfied customers, through a collaborative approach that maximizes the success of our customers while having safety as a priority”

Carla Cunha, Vice President Operations, ANDRITZ Nonwoven

FULL RANGE OF CAPABILITIES



Operational excellence



Operations Mission

- Deliver on time and on budget
- Lean principles employed in all process steps of our value chain
- Maximum safety for our people and customers

FULL RANGE OF CAPABILITIES



Project and site management

ON-SITE TEAMWORK LEADS TO SUCCESS

Benefit from:

- Highly competitive solutions in terms of costs, quality and lead time.
- A worldwide network and global experience
- Great leadership abilities of our project & site managers
- Customer focused project management
- Logistics and shipment management



FULL RANGE OF CAPABILITIES



Engineering & Manufacturing

ENGINEERING & MANUFACTURING AS A BASIS FOR TECHNOLOGY LEADERSHIP

Benefit from:

- Highly skilled and proficient competencies in engineering, design and planning
- Continuous technological development, joint developments between the engineering and manufacturing teams
- High quality and safety standards
- High specialized manufacturing in international ANDRITZ Nonwoven locations, ensuring high-end consistent product quality – CIP culture



FULL RANGE OF CAPABILITIES



Automation and digital solutions with Metris

BROAD PORTFOLIO OF INTELLIGENT; DIGITAL SOLUTIONS AND PRODUCTS WITH THE BRAND METRIS

Benefit from:

- Fully tailored solutions
- Improving safety
- Enhancing plant efficiency and profitability
- Optimizing the use of resources
- Constant and highest product quality
- Avoiding production downtime
- Maximum user-friendliness, e.g. easy control via smartphone/tablet PC/smart glasses





FULL RANGE OF CAPABILITIES SERVICE

ANDRITZ NONWOVEN



One division fully committed to the nonwovens industry – from the raw material up to converting



“Our mission is to make sure that our customers can continuously meet their targets in terms of machine uptime, quality of the manufactured product as well as waste levels and energy consumption.”

The ANDRITZ Nonwoven service team is dedicated to support customers with tailored designed services along the machine lifecycle time.”

Ettore Paolini, Vice President Service, ANDRITZ Nonwoven

FULL RANGE OF CAPABILITIES



Service

BROAD SERVICE PORTFOLIO KEEPS YOUR MACHINES AT PEAK PERFORMANCE

Benefit from:

- Outstanding service product portfolio – from spare parts to complete solution provider
- Close cooperation with the customer operation and maintenance personnel
- Committed to improved reliability, availability, and production while reducing overall operating costs
- Comprehensive service agreements



FULL RANGE OF CAPABILITIES



Leverage your competitive edge with our spot-on service

SERVICE POSITION STATEMENT

Among the nonwoven machinery service, ANDRITZ Nonwoven is the **total solution provider** that gives **best up-time** and **predictability** because we stock mission critical components and have expert field service engineers for **peace of mind**.



SERVICE CENTERS AROUND THE GLOBE



Global supplier – local presence



ANDRITZ Asselin-Thibeau, Elbeuf, France

Service offerings

- service center for needlepunch equipment
- sales and service
- assembly center
- project management
- Technical center incl. neXline needlepunch eXcelle



ANDRITZ Küsters, Krefeld, Germany

Service offerings

- roll service center
- sales and service
- assembly center
- project management
- Technical center incl. several calenders and neXline wetlace pilot line



ANDRITZ Laroche, Cours, France

Service offerings

- service center for airlay and recycling equipment
- sales and service
- assembly center
- project management
- Technical center incl. Airlay, bast fiber and recycling lines



ANDRITZ Perfojet, Montbonnot, France

Service offerings

- service center for spunlace equipment
- sales and service
- assembly center
- project management
- Technical center incl. neXline spunlace eXcelle and carded-pulp process



ANDRITZ Diatec, Collecchio, Italy

Service offerings

- service center for converting equipment for baby diapers, adult incontinence, fem-care, food pads and lamination products
- sales and service
- assembly center
- project management

SERVICE CENTERS AROUND THE GLOBE



Global supplier – local presence



**ANDRITZ Küsters
Spartanburg, USA**

Service offerings

- roll service center
- sales and service
- assembly center
- project management



**ANDRITZ SHW
Torrington, USA**

Service offerings

- roll service center
- sales and service
- assembly center
- project management



**ANDRITZ (China) Ltd. ,
Wuxi branch**

Service offerings

- sales and service
- roll service center
- roll test stand



**ANDRITZ Technologies
Pvt. Ltd., Chennai, India**

Service offerings

- sales and service
- service center for spunlace and needlepunch equipment

ROLL SERVICE CENTERS AROUND THE GLOBE



Global supplier – local presence



**ANDRITZ Küsters
Spartanburg, USA**

The service center encompasses:

- Roll repair, reconditioning and upgrades
- Three cutting-edge grinders and a lathe
- Roll balancing equipment
- State-of-the-art dynamic roll test stand



**ANDRITZ SHW
Torrington, USA**

The service center encompasses:

- Roll repair, reconditioning and upgrades
- Cutting-edge grinders and a lathe
- Roll balancing equipment
- State-of-the-art dynamic roll test stand



**ANDRITZ (China) Ltd.,
Wuxi branch**

The service center encompasses:

- Roll repair, reconditioning and upgrades
- Grinding equipment
- State-of-the-art roll test stand



**ANDRITZ Küsters,
Krefeld, Germany**

The service center encompasses:

- Roll repair, reconditioning and upgrades
- Five cutting-edge grinders and six lathes
- Two Milling and drill processing centers
- Two state-of-the-art dynamic roll test stands



STRATEGIC APPROACH

STRATEGIC APPROACH

One division fully committed to the nonwovens industry – from the raw material up to converting

- **Customer satisfaction and close partnership**
- Industrial IoT solutions: **METRIS**
- **Continuous development** of technical and service products
- Emphasized focus on **renewable energy and sustainability**
- Strengthened local **service support** – global technology platform
- Technological **leadership**



ANDRITZ
ENGINEERED SUCCESS

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