



TIC Retail Accessories

Garment Hanger and Accessory Supply

Brief Overview

TIC Retail Accessories

- TIC Retail Accessories was established in Australia in 1989
- TIC pioneered a world-first innovation to design closed loop garment hangers & accessories supply chain programs
- Today TIC supplies garment and accessory hangers to apparel manufacturers, enabling them to deliver garments floor ready prior to shipping into the retailer distribution centres
- TIC RA also manages closed loop supply chain programs for EAS security tag retailers for a number of retailers
- TIC's core expertise is managing all back of store operations, simplifying store processes and moving products back through the supply chain - a closed loop model
- An experienced management team and global support structure. Over 2,000 direct employees
- In November 2018 TIC Retail Accessories was acquired by Pact Group (PGH.AX)



TIC Geography

Domestic & International Infrastructure

Our Operations

- Over 1 billion hangers and accessories sold annually worldwide
- More than 600 million hangers are collected, sorted and repacked annually
- More than 200 million EAS tags are collected, sorted and repacked annually
- New Hanger Manufacturing facilities: China, India, Bangladesh, Turkey & Vietnam
- Hanger sorting and repacking facilities: China, UK, Australia, Sri Lanka
- In-house hanger design and tooling expertise
- Corporate Governance: TIC maintains strict ongoing quality control processes and undergoes external independent audits covering global, ethical and environmental standards
- Supplies products to retailers and customers in Australia, Asia, Europe and USA



Company and Industry Overview

Market Share

- Globally delivering well over a billion hangers and EAS tags
- Key partnerships with leading mass merchant and department store retailers
 - > **USA** - Kohl's & Target
 - > **UK** - Tesco & Matalan
 - > **Australia** - Kmart, Target, Big W, Best & Less, Myer, David Jones, Harris Scarfe, Country Road, Forever New, Hanes, Noni B, Rebel and Anaconda
 - > **New Zealand** - The Warehouse
- TIC has never lost a retail client in over 30 years, since inception, mainly due to an intense focus on service
 - > The best way to service the customer is by exceeding their expectations
 - > Support the apparel suppliers with all the 'one percenters'
 - > Anticipate rather than react
 - > Total transparency
 - > Communications and reporting tantamount
 - > Invest into key infrastructure – sorting, repacking and manufacturing facilities
 - > Our people are our most important asset – experienced, dedicated and committed



Company and Industry Overview

Relationships With Apparel Manufacturers

- TIC works with more than a thousand apparel manufacturers and suppliers globally
- TIC's online ordering platform is simple and straightforward to use. It is published in English and Chinese
- Online training seminars and/or email user instructions
- Local company staff and offices in Australasia, China, Hong Kong, Bangladesh, India, Sri Lanka, Europe and USA
- Regular customer service visits to all apparel suppliers
- Larger suppliers meet for a seasonal review and share ideas for improvements going forward
- Annual meetings with key retailer sourcing offices and often including apparel suppliers



Company and Industry Overview

Number and Location of Manufacturing and Repacking Facilities

Location	Operation
Asia	
Ningbo, China	Repacking, Warehousing
Dongguan, China	Manufacturing, Warehousing
N.T, Hong Kong	Warehousing
Ho Chi Minh City, Vietnam	Repacking Warehousing, Manufacturing
Sub-Continent	
Colombo, Sri Lanka	Repacking Processing, Warehousing
Dahka, Bangladesh	Manufacturing, Warehousing
Mumbai, India	Manufacturing

Location	Operation
Europe	
Worksop, England	Repacking Processing, Warehousing
Izmir, Turkey	Manufacturing, Warehousing
Americas	
Guatemala City, Guatemala	Warehousing
Boca Raton, USA	Warehousing
Oceania	
Melbourne, Australia	Repacking Processing, Warehousing
Auckland, New Zealand	Warehousing

Company and Industry Overview

Offices & Operations

- New Hanger Manufacturing facilities:
China, Bangladesh, India, Turkey & Vietnam
- Hanger Repacking facilities:
China, UK, Australia, Sri Lanka & Australia

TIC Locations



Australia

China

Ningbo & Shanghai

Hong Kong

Bangladesh

Sri Lanka

India

Turkey

Vietnam

New Zealand

United Kingdom

USA

Company and Industry Overview

Technology Required

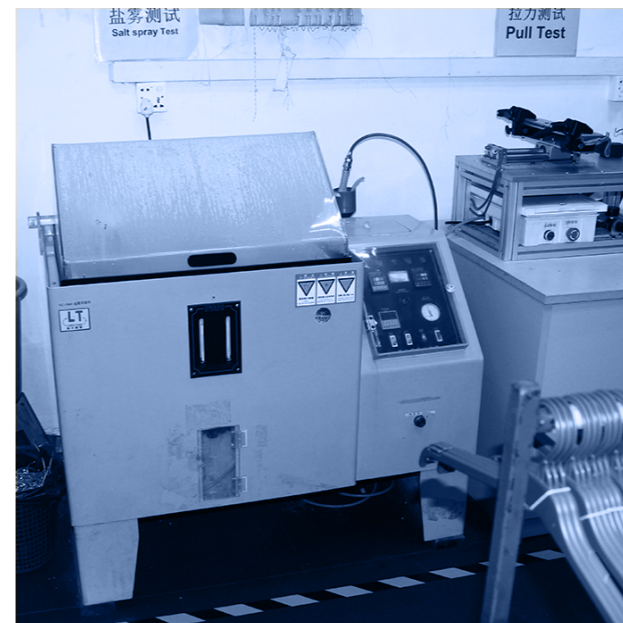
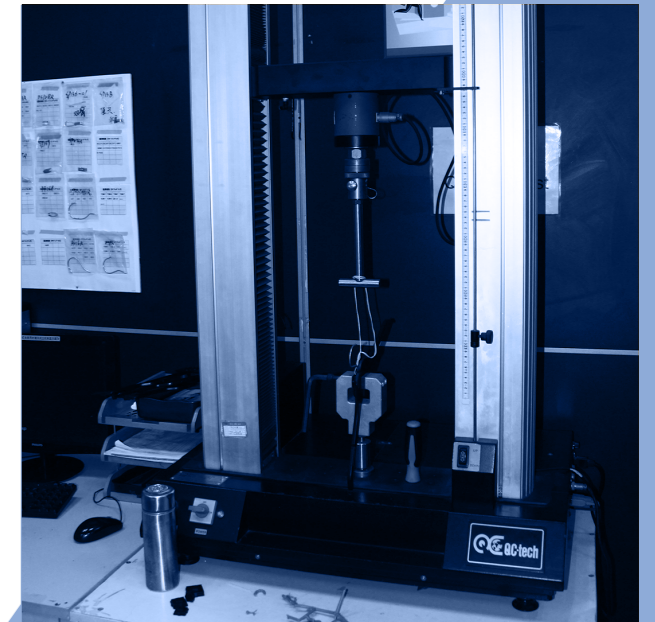
- TIC uses SAP platform and have on-boarded numerous retailers effortlessly
- Main technology requirement from apparel manufacturers will be web ordering access
- Variable supporting suite of reporting will be available



Company and Industry Overview

Quality Systems

- TIC has an established quality management procedure in all manufacturing & repacking plants
- The policies and procedures at these plants conform to the ISO9001 standard and compliance where the standard has been certified by third party auditors
- The quality systems are extensive and cover issues such as supplier selection, test methods and procedures, conformance to materials specification, conformance to finished product specification, and the physical quarantining of non-conforming products
- TIC has recently successfully implemented Business Social Compliance Initiative (BSCI) across all South and Central Asia operations to meet with UK & European requirements



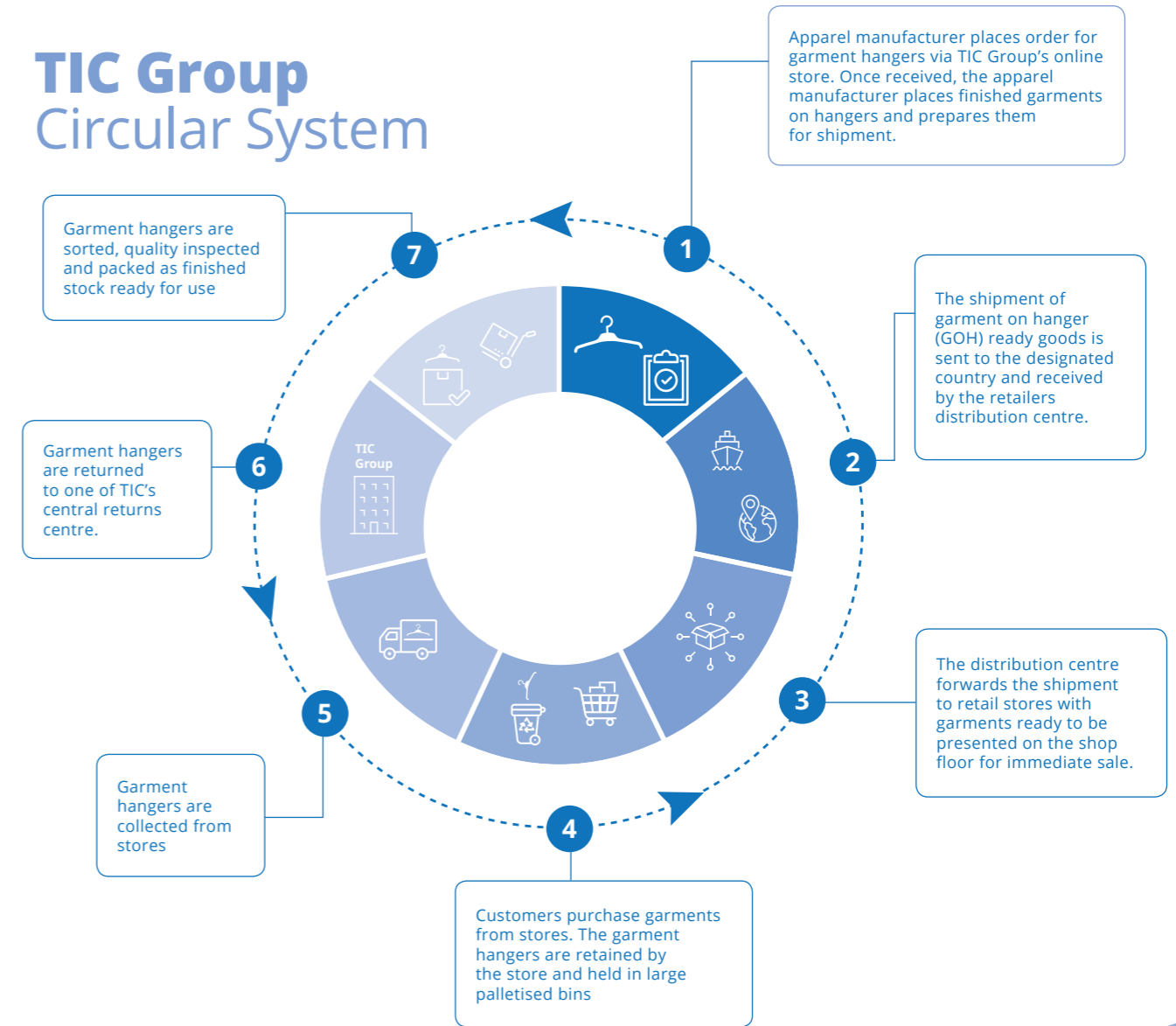
Company and Industry Overview

Closed Loop Hanger Supply Chain Specialists

- Each year TIC diverts enough garment hangers and accessories into its repacking program, that if laid end to end, the hangers would go around the world three times
- TIC works with all customer retail partners, establishing a suitable collection process for their individual solutions
- The process involves collecting garment hangers after sales from retail stores; quality inspection and distributing them to apparel, footwear & accessory suppliers around the world
- TIC currently has 5 repacking plants around different parts of the world to cover all customer requirements



TIC Group Circular System



Company and Industry Overview

Environment & Sustainability

- TIC sorts and repacks up to 8 million garment hangers & 2 million EAS tags each week
- TIC is committed to positive environmental outcomes and commissions independent third party assessments to provide analysis and feedback on our hanger programs

The following are realised

- Using Closed Loop hanger supply chain programs rather than manufacturing new saves 86% of water and 34% of carbon emissions
- TIC is diverting well over a million hangers a day from landfill



TIC RA and TIC Group Retail Partners

