Meeting consumers where they are

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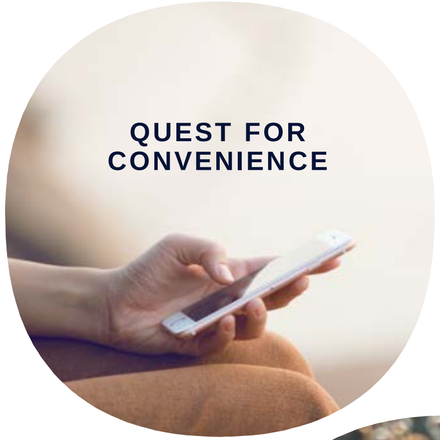
Making the **everyday** **extraordinary**

Changing consumer habits

GLOBAL INFLUENCES



Consumer habits continue to evolve rapidly

Consumer insight crucial for the company to:

- **continue to stay relevant**
- **be able to meet consumers where, when and however they want**
- **proactively develop offering and services**

Making the everyday extraordinary

Fiskars Group distribution channels

WHOLESALE	DIRECT TO CONSUMER	HOSPITALITY & B2B
Pureplay e-comm Wholesale e-comm & offline Other	~350 own locations E-comm:	

Target: increase share of direct to consumer sales

Current state:

- **LIVING:**
  Currently ~1/3 of net sales

- **FUNCTIONAL:**
  Currently small

E-commerce is the fastest growing channel in our categories

In the product categories we operate in, an estimated 10-30% is sold online

Both direct and indirect e-commerce channels

Indirect channel including pureplay e-commerce players and traditional players' e-commerce

Right capabilities enabling direct e-commerce growth

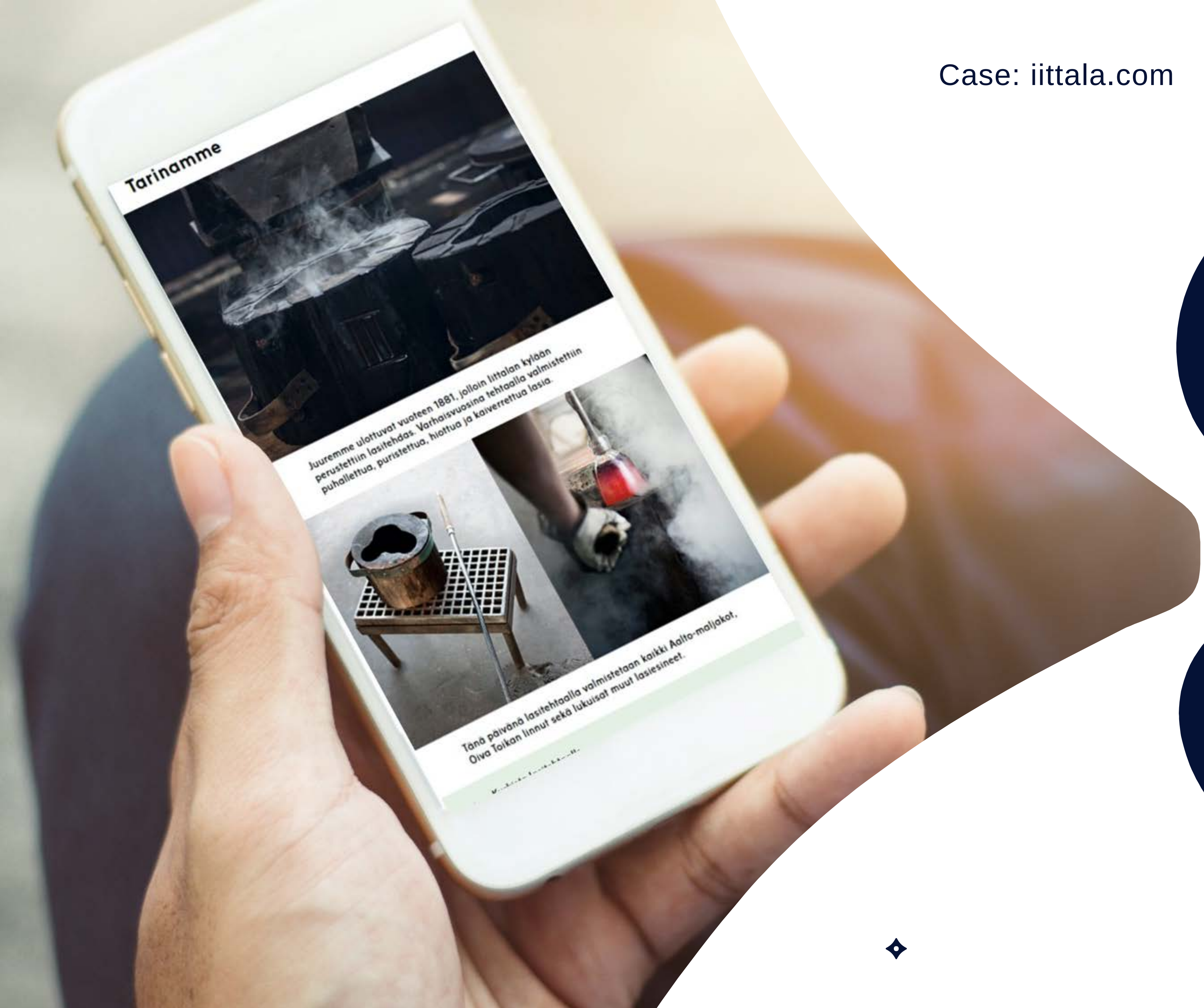
Direct e-commerce channel growing

Share of group net sales still lower than in other categories, such as fashion

Shared group capabilities

Unified platform in roll-out phase

Global logistics



Case: iittala.com

1.3
million myiittala members

Strong double-digit %
net sales growth CAGR in 2015-18

Strong double-digit %
Increase in average customer value with inspirational messaging

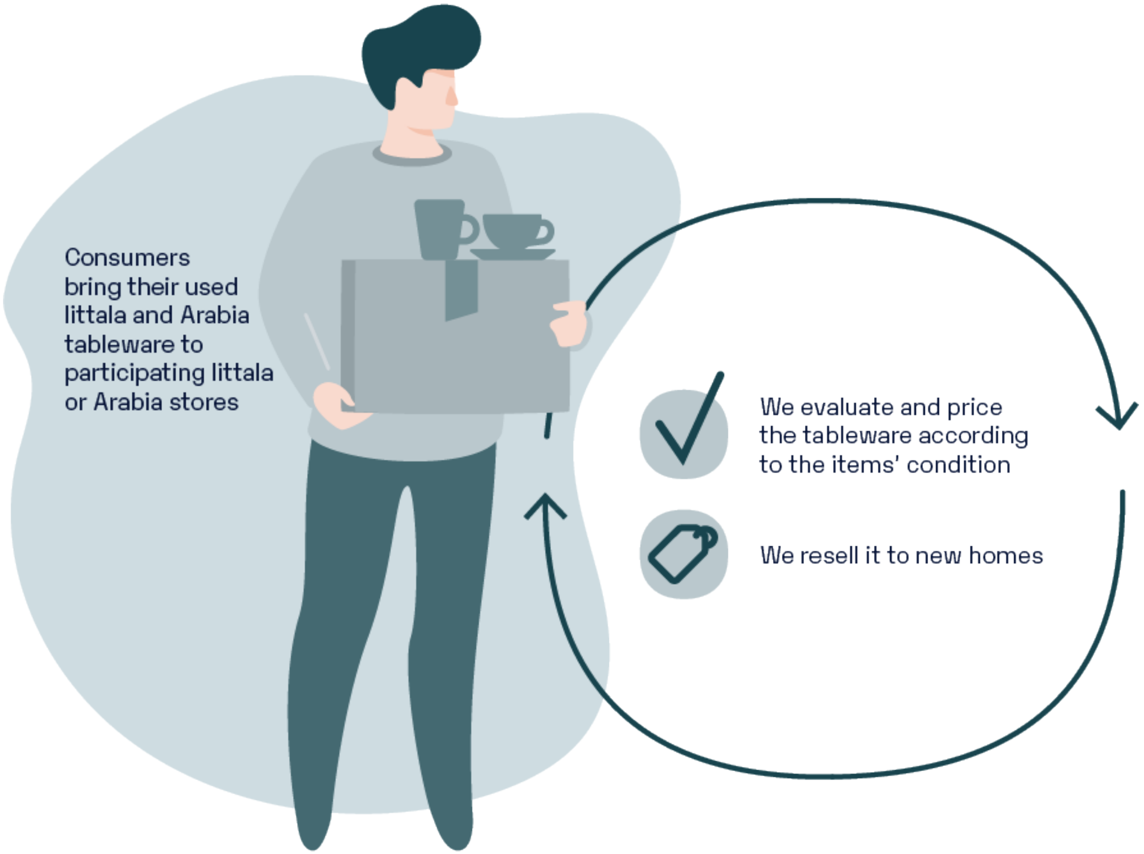
Size gives us an advantage

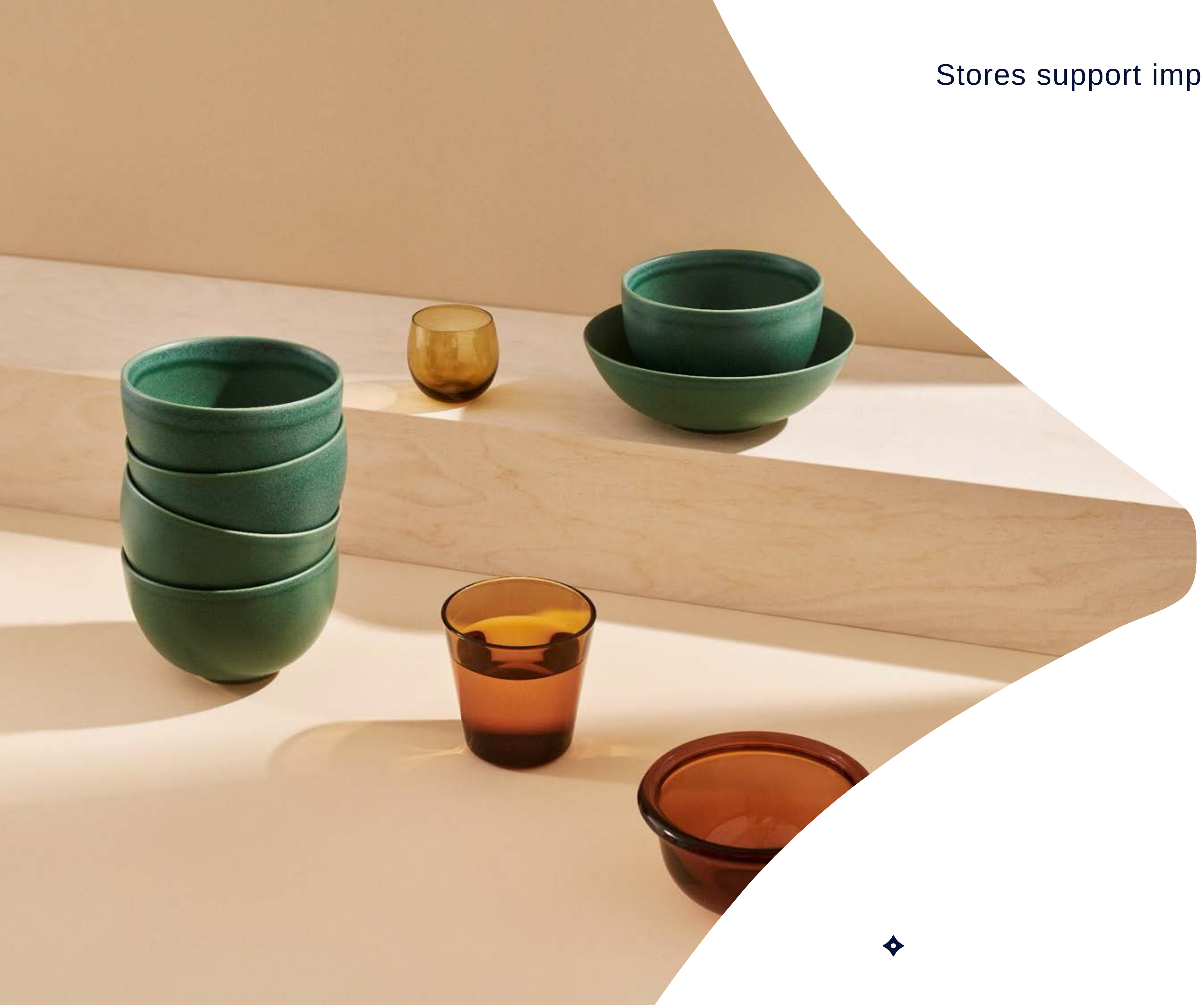
Efficiency in e-commerce

Consumer insight capabilities

New flagship store concepts to be rolled out, omnichannel focus

Stores as a platform for new services





Stores support implementation of services

vintage

Rolled out in all own iittala stores in Finland in 2019

E-commerce extension in piloting phase

Assessing expansion to other countries

Responding to new consumer habits, such as sharing and renting

Arabia launched subscription service on November 18, 2019

Appendices

Brands with own e-commerce

iittala

ROYAL COPENHAGEN
PURVEYOR TO HER MAJESTY THE QUEEN OF DENMARK

ROYAL DOULTON
LONDON

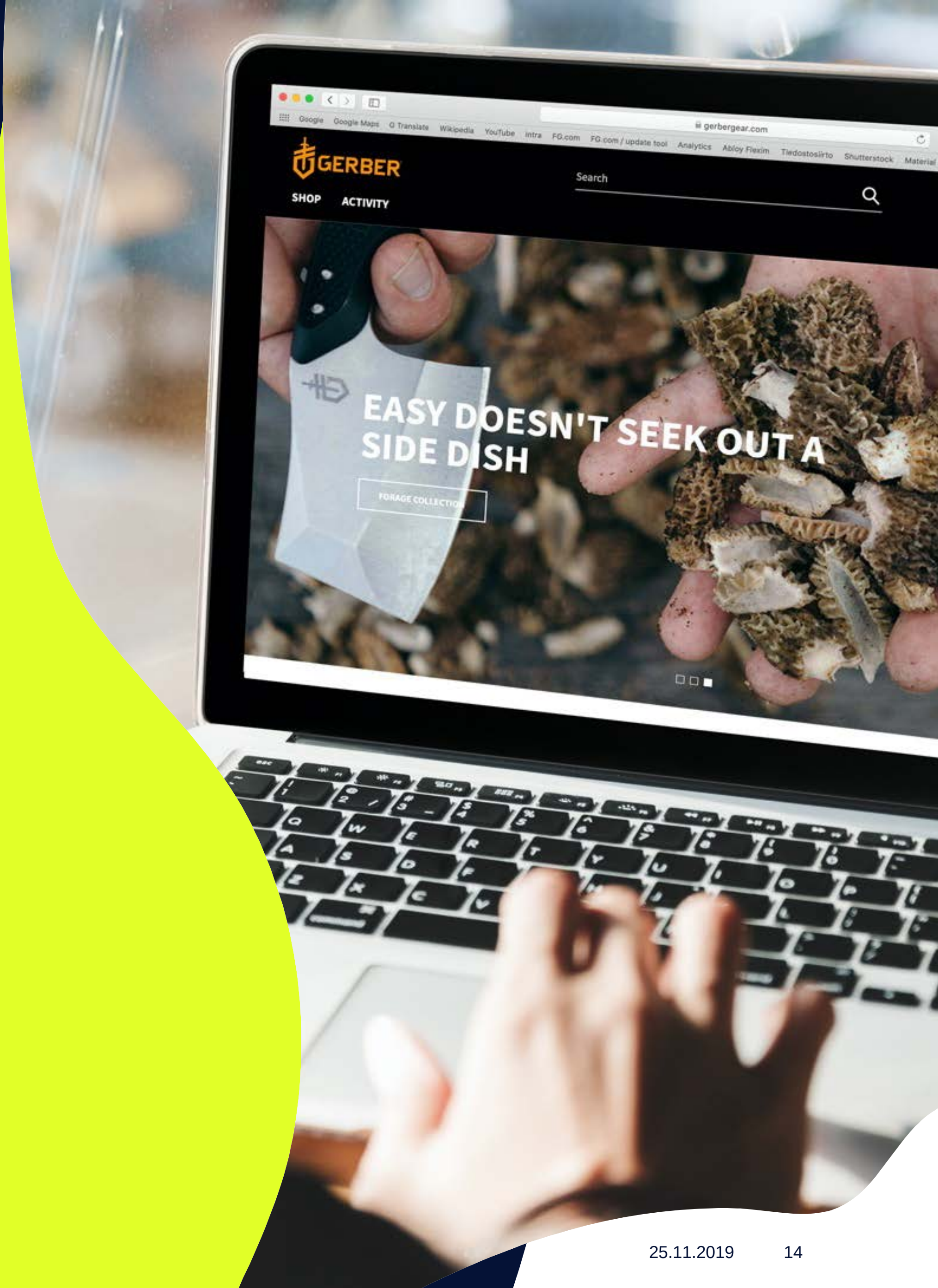
WATERFORD

WEDGWOOD
ENGLAND 1759

FISKARS®

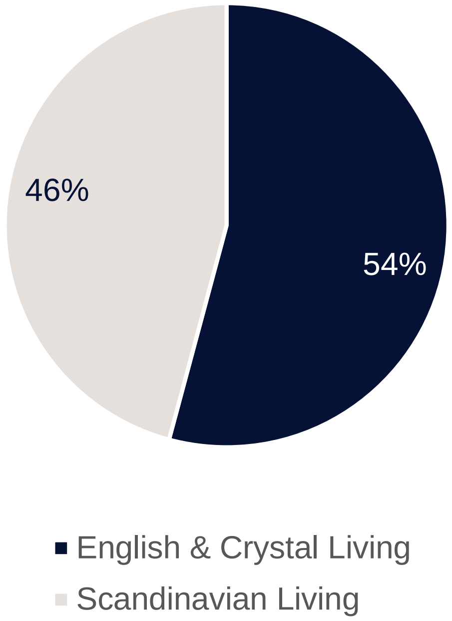
GERBER

Gilmour

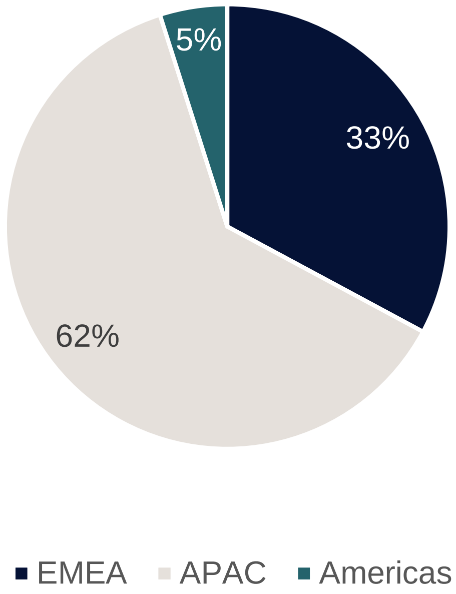


A total of 347 own stores at the end of 2018

BY BUSINESS



BY REGION



BY TYPE