



20
26

Investor Day

11 June 2026

Super Retail Group
5-Year Strategy

Paul Bradshaw
Group Managing Director
& Chief Executive Officer



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Acknowledgement of Country

I would like to acknowledge the Traditional Owners of the country on which we are each present.

Today I'm on the lands of the Gadigal people of the Eora nation and I recognise their continuing connection to lands, waters and communities.

I pay my respects to their Elders past and present.

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Safety briefing

Fullerton Hotel Sydney

SUPER RETAIL GROUP



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Agenda

Welcome and introduce our strategy	Paul Bradshaw	8.30 – 9.00am
Brands	Supercheap Auto	Ben McConnell 9.00 – 9.15am
	rebel	Jenny Child 9.15 – 9.30am
	BCF	Michael Wassman 9.30 – 9.45am
	Macpac	Reuben Casey 9.45 – 10.00am
Q&A (Brands)		10.00 – 10.30am
BREAK		10.30 – 11.00am
Transformation	Mandy Ross	11.00 – 11.20am
Supply chain	Amy Bentley	11.20 – 11.35am
Capital management	David Burns	11.35 – 11.55am
Q&A and wrap up		11.55 – 12.30pm
LUNCH		12.30 – 1.30pm

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1

Group strategy

Paul Bradshaw
Group Managing Director & Chief Executive Officer



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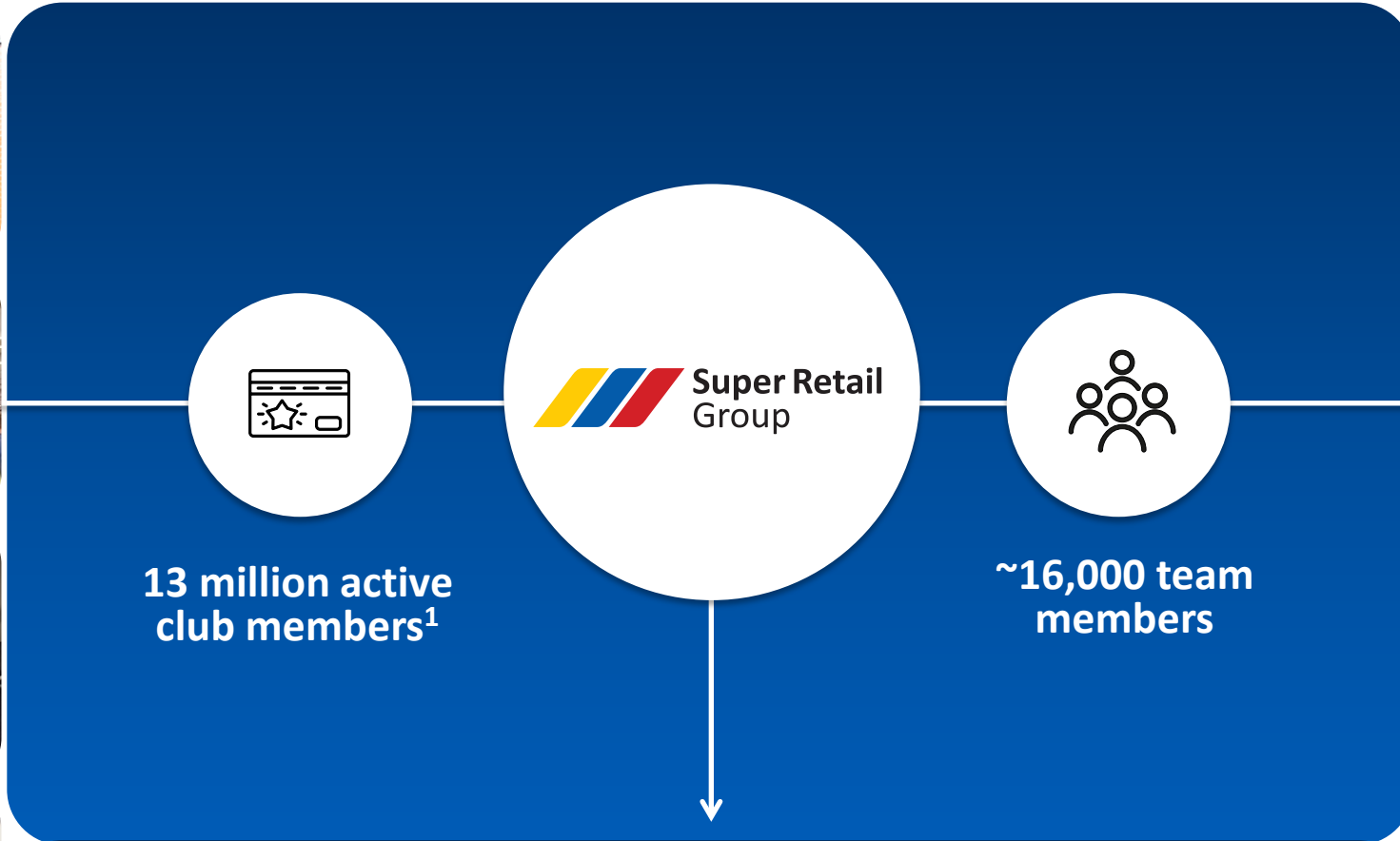
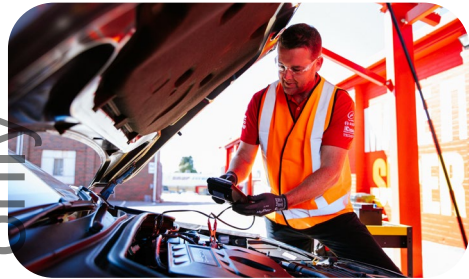


Super Retail Group



We inspire and equip everyone to live their passion every day

Super Retail Group is where loyal and passionate customers interact with highly engaged team members across four powerful brands



~790 stores
across Australia and
New Zealand²



1. Active club member is a club member who purchased in the last 12 months. As at December 2025
2. As at May 2026

Powerful brands in high involvement leisure and lifestyle categories

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Auto

Supercheap Auto

- +7% CAGR¹ revenue growth FY19-FY25
- 68% (AU) / 61% (NZ) brand awareness²

Sport

rebel

- +5% CAGR¹ revenue growth FY19-FY25
- 60% brand awareness²

Outdoor

BCF

macpac

← **Leisure** X **Adventure** →

- +11% CAGR¹ revenue growth FY19-FY25
- 62% brand awareness²
- +9% CAGR¹ revenue growth FY19-FY25
- 14% (AU) / 53% (NZ) brand awareness²

1. CAGR is the compound annual growth rate
 2. Source: Stellar Market Research, Q3 FY26 results, 'Spontaneous Awareness' (Q: Thinking about [category] stores, where would you go to buy these types of items? Which stores can you think of?)

Highly engaged and loyal customer base

**SUPERCHEAP
AUTO**



- 5m active club members
- 75 NPS
- 85% of sales from active club members

rebel



- 4.3m active club members
- 70 NPS
- 82% of sales from active club members

BCF



- 2.8m active club members
- 77 NPS
- 92% of sales from active club members

macpac



- 0.9m active club members
- 75 NPS
- 81% of sales from active club members

Powerful first party data and analytics with ability to communicate and engage directly with over 13 million members

Our leadership team to deliver the strategy

And the values that guide the team and the way we work

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Paul Bradshaw
Group Managing Director and Chief Executive Officer



David Burns
Chief Financial Officer



Amy Bentley
Chief Supply Chain and Efficiency Officer



Ray Birt
Acting Chief Information & Digital Officer



Reuben Casey
Managing Director - Macpac



Jenny Child
Managing Director - rebel



Kevin Figueiredo
Chief People & Safety Officer



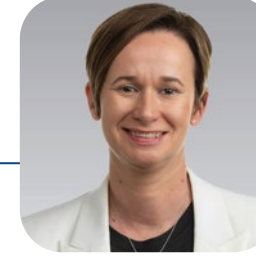
Sarah Hunter
Chief Financial Officer, Designate¹



Inga Kirkman
Chief Legal Officer & Company Secretary



Ben McConnell
Managing Director - Supercheap Auto



Mandy Ross
Chief Transformation Officer



Michael Wassman
Managing Director - BCF

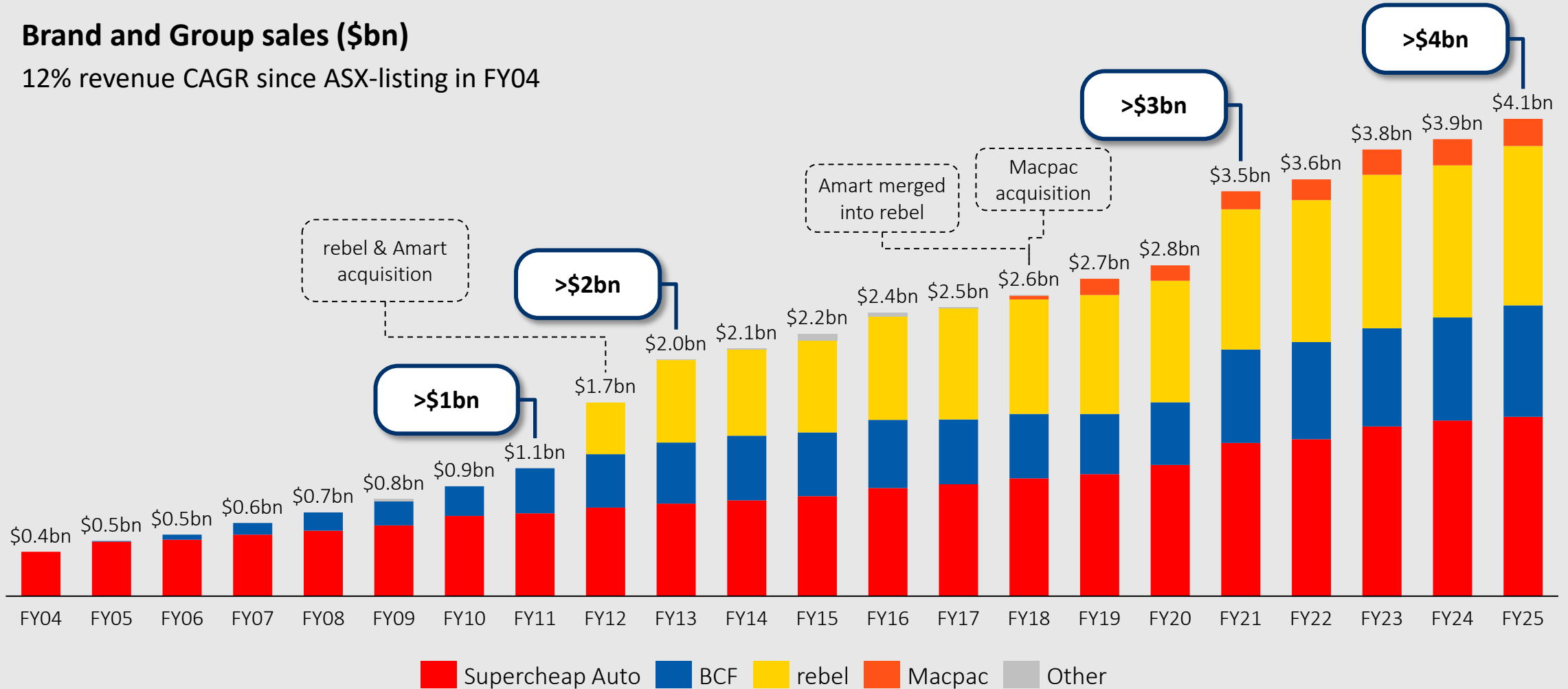


1. Sarah Hunter will assume the role of Chief Financial Officer on August 28, 2026

Delivering consistent growth over 20+ years

Brand and Group sales (\$bn)

12% revenue CAGR since ASX-listing in FY04



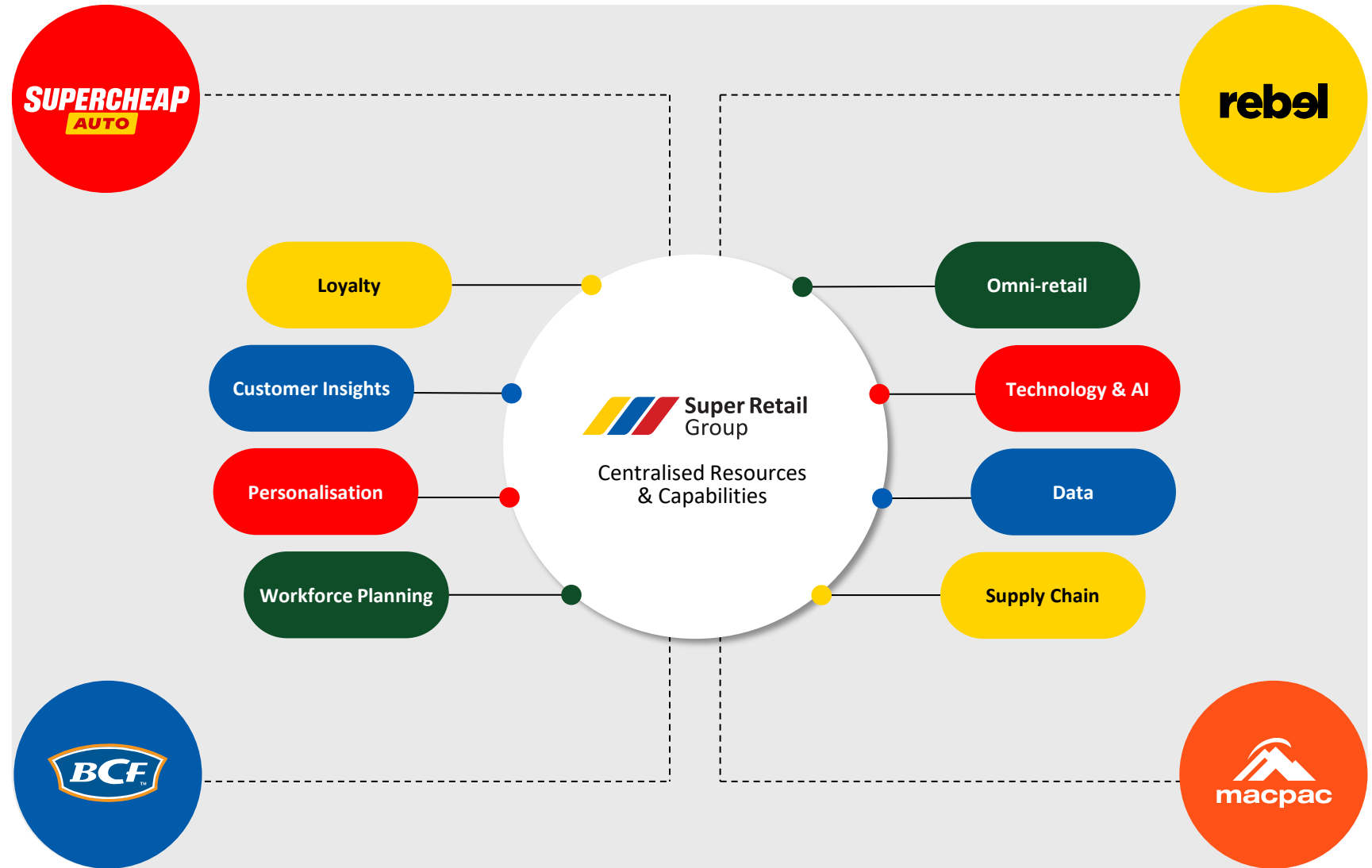
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1. rebel sales are inclusive of Amart before all stores were converted to rebel in 2017
 2. Rays sales are included in BCF until 2018, and included in Macpac from 2019

Our group structure enables us to scale investments and capabilities

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- Centralised model delivers operating and cost efficiencies across the Group
- Single, scaled investments in loyalty, customer data, supply chain and omni-retail
- Group-wide platforms provide brands access to systems and capabilities not viable on a standalone basis



\$65 billion total addressable market across our three categories

... of which we currently capture approximately \$4bn in revenue

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\$65bn

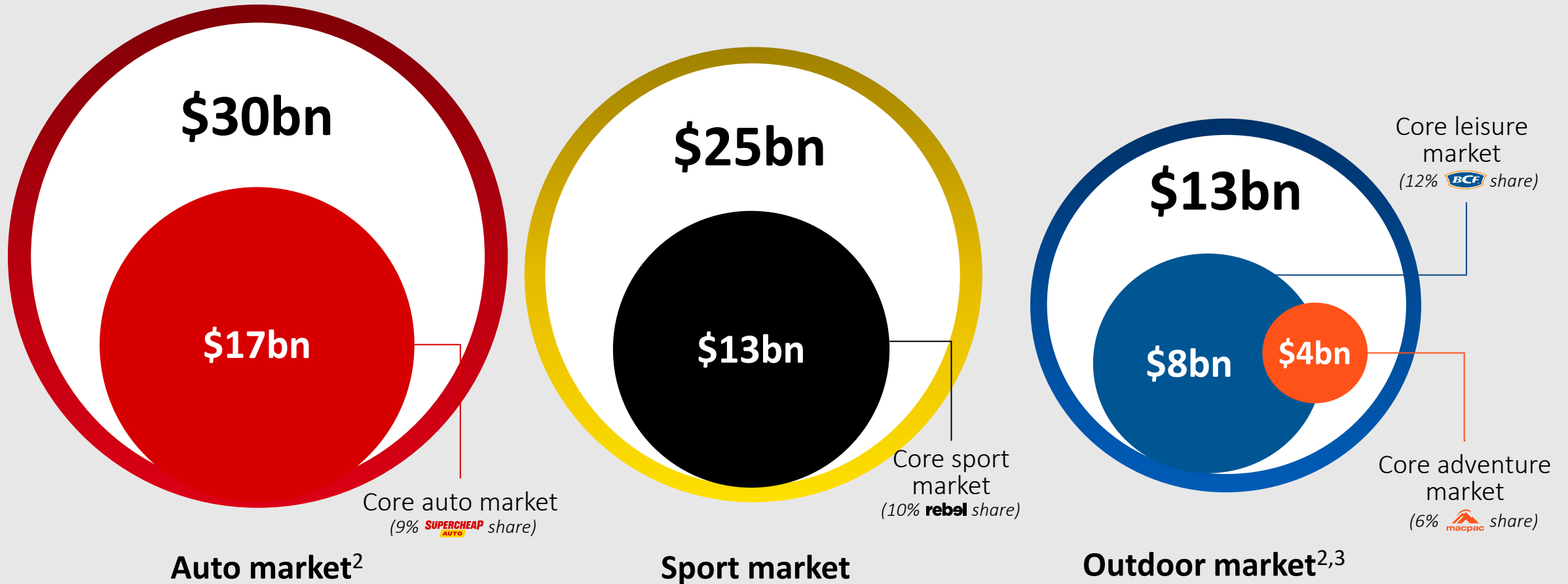


TOTAL ADDRESSABLE MARKET (TAM)
across Auto, Sport & Outdoor



All four brands have clear headroom for growth

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1. Boston Consulting Group and Super Retail Group management team FY25 market estimates, as at 31 October 2025
2. 4WD category duplicated in Auto and Outdoor markets but included only once in \$65bn TAM
3. There is overlap between Core Adventure and Core Leisure market categories, with both existing within the overall Outdoor market

Our strategy to fuel the next phase of growth

OUR PURPOSE

We inspire and equip everyone to live their passion every day

OUR VISION

Be the first choice for customers in Australia and New Zealand

OUR GROWTH ENGINES



- Range
- Store format
- Fitment



- Regional stores
- Private brand
- Owning sport



- Superstores
- Large format
- 4WD fitment



- Product
- Brand awareness
- Network

Maintained by

Continuous improvement in retail execution

POWERED BY TRANSFORMATION



CUSTOMER

Meeting customers where and how they shop

TEAM

Helping teams perform at their best

FLOW

Streamlining end-to-end retail processes

VALUE

Sustainable cost advantage



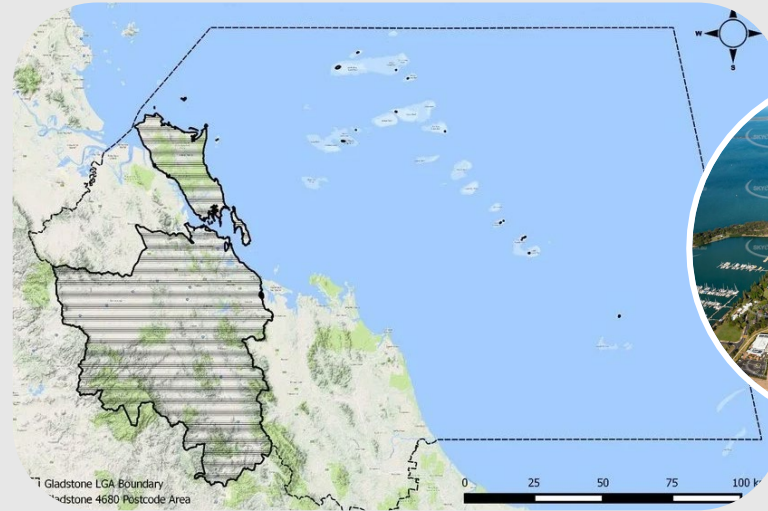
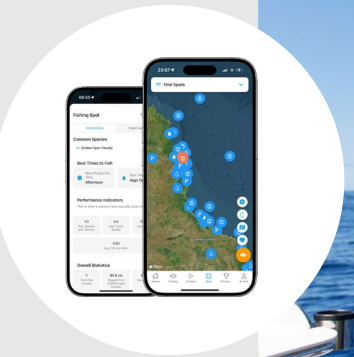
FOUNDATIONS

Embedding digital, data, AI and process foundations that enable integration and scale.

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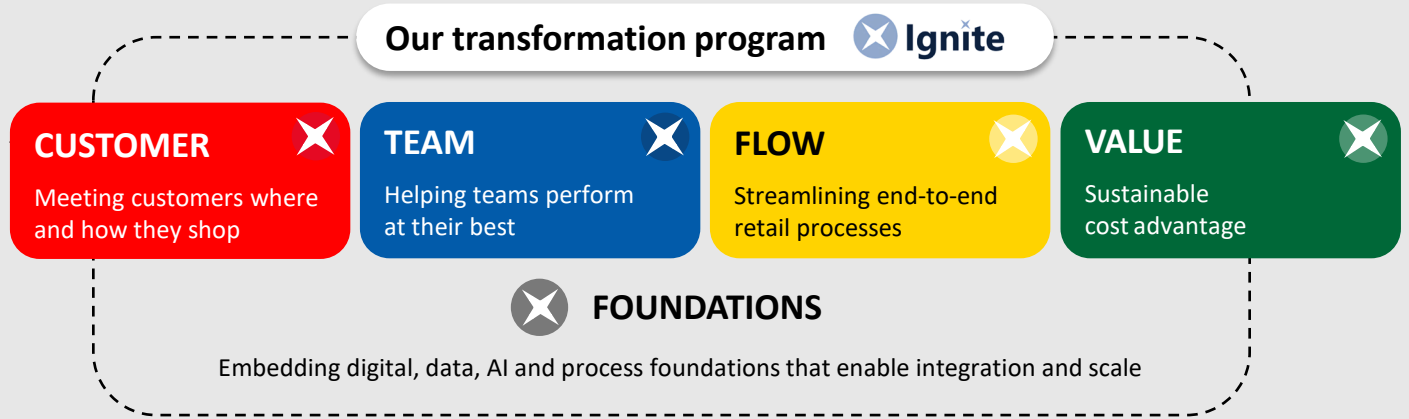
We must be closer to our customers than ever before

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Ignite will ensure we transform with a rapidly evolving customer

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We made strong progress in the last five years, moving closer to our customers

Retail is rapidly evolving, our transformation program will unlock growth over the next five years

Ignite aims to deliver:

 Better customer moments

 Teams equipped to serve

 Business built for growth

Our transformation program will be people-led, technology-enabled

A strong balance sheet provides optionality to pursue growth


Exercising strong financial discipline and capital management

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Existing portfolio

- Investments in the store network to protect and grow sales, market share, and enhance the customer experience
- Investments in omni-channel capabilities with digital being the front door for customers

Growth opportunities

- Pursuing growth initiatives that create and enhance Group capabilities and strengthen competitive advantage (e.g.,  Ignite)
- Expansion into adjacent categories / profit pools with existing brands

Inorganic opportunities

- Capacity to consider new opportunities within existing Auto, Sport and Outdoor categories that may be outside of current scope of existing brands

Primary focus on driving growth from the core four brands in existing categories, whilst enhancing Group capabilities that can be leveraged across each of the business units

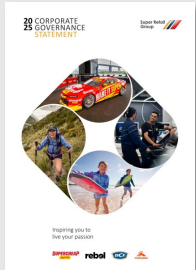
We are committed to growing in a sustainable way

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Fostering an engaged, safe, and future fit workforce

Delivering meaningful community and environmental impact



Preserving our social licence to operate

Strengthening supply chain resilience and responsibility



Our 2030 Sustainability Framework

Acting and disclosing on climate-related risk and opportunity

Supporting the transition to a circular economy



Ahead of schedule toward our target of diverting >90% of waste from landfill

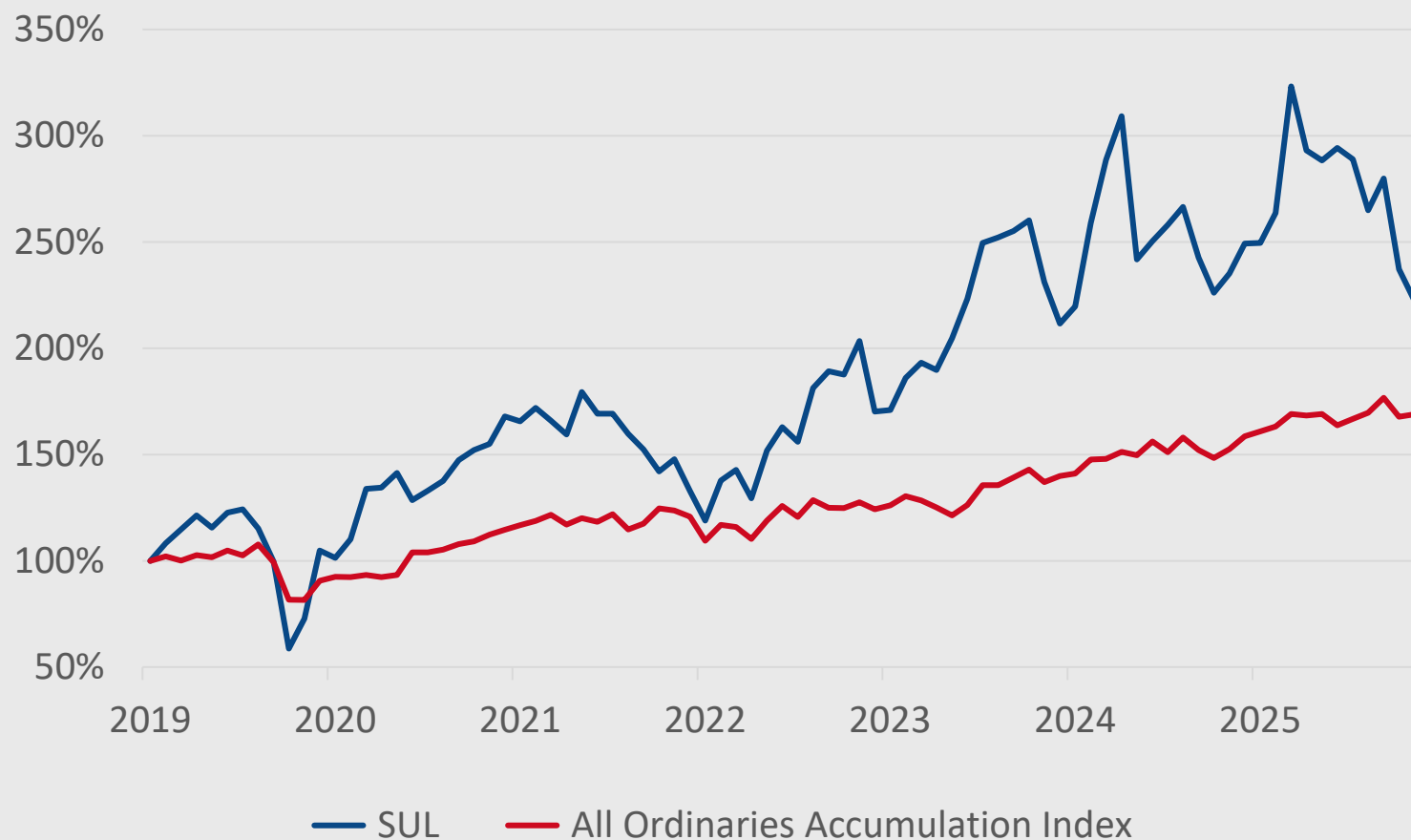


Truganina DC



Total shareholder returns have exceeded the broader market over the previous strategic arc

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SUL +12.4% CAGR

Market +8.0% CAGR

Since inception in 2004, SUL shares have delivered TSR CAGR of 12.9%, relative to total market CAGR of 8.6% over the same period

We have a compelling investment proposition

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Attractive high involvement and passion-led categories in large and growing addressable markets

A unique portfolio of powerful brands



A large customer loyalty base contributing 85% of Group sales

Building an unrivalled national network of stores in Australia and New Zealand

An efficient omni-retail model allowing customers to shop where and how they want

A passion-led team with deep brand and customer connection

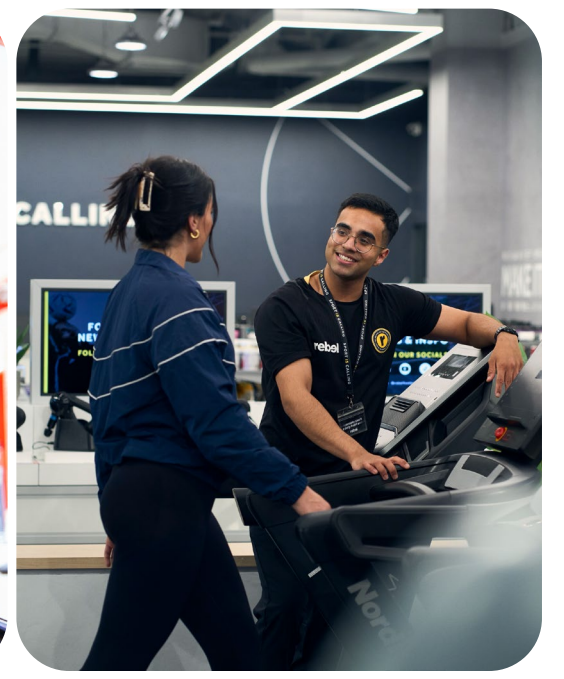
Our Group structure enables us to scale investments and capabilities

A highly cash generative business and strong balance sheet

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2 Our brands

Brand Managing Directors



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SUPERCHEAP

AUTO

Ben McConnell
Managing Director – Supercheap Auto



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SUPERCHEAP AUTO

WHATEVER YOU DRIVE

SUPERCHEAP
AUTO

Australia and New Zealand's leading automotive aftermarket retailer

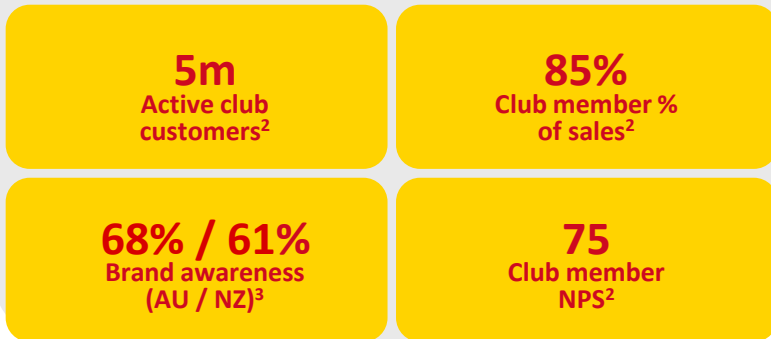


Who we are

- Australia and New Zealand's leading automotive aftermarket retailer
- A highly accessible, one-stop destination for vehicle owners
- Trusted for range, convenience and value, supporting both DIY and Do-It-For-Me customers (Fitment services)
- The destination of choice for three key shopper missions:
 - Keep your vehicle running
 - Make your vehicle look good
 - Enhance your vehicle to get the most out of it

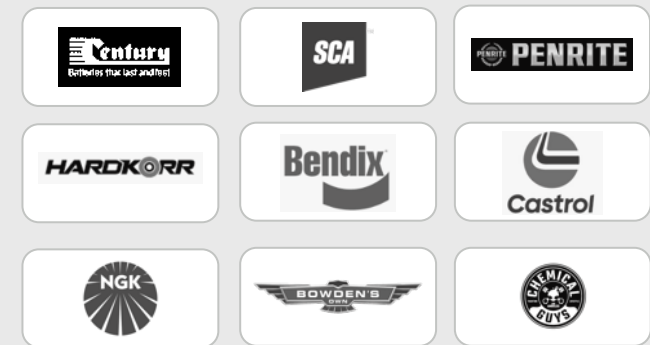
Our customers

- Car enthusiasts: their car is their passion, high spenders across categories (e.g., project cars, 4WD, car service products and tools)
- Broader market: basic car needs like car care and accessories
- Trade customers: use automotive products and tools in their daily business activities



Our trade partners

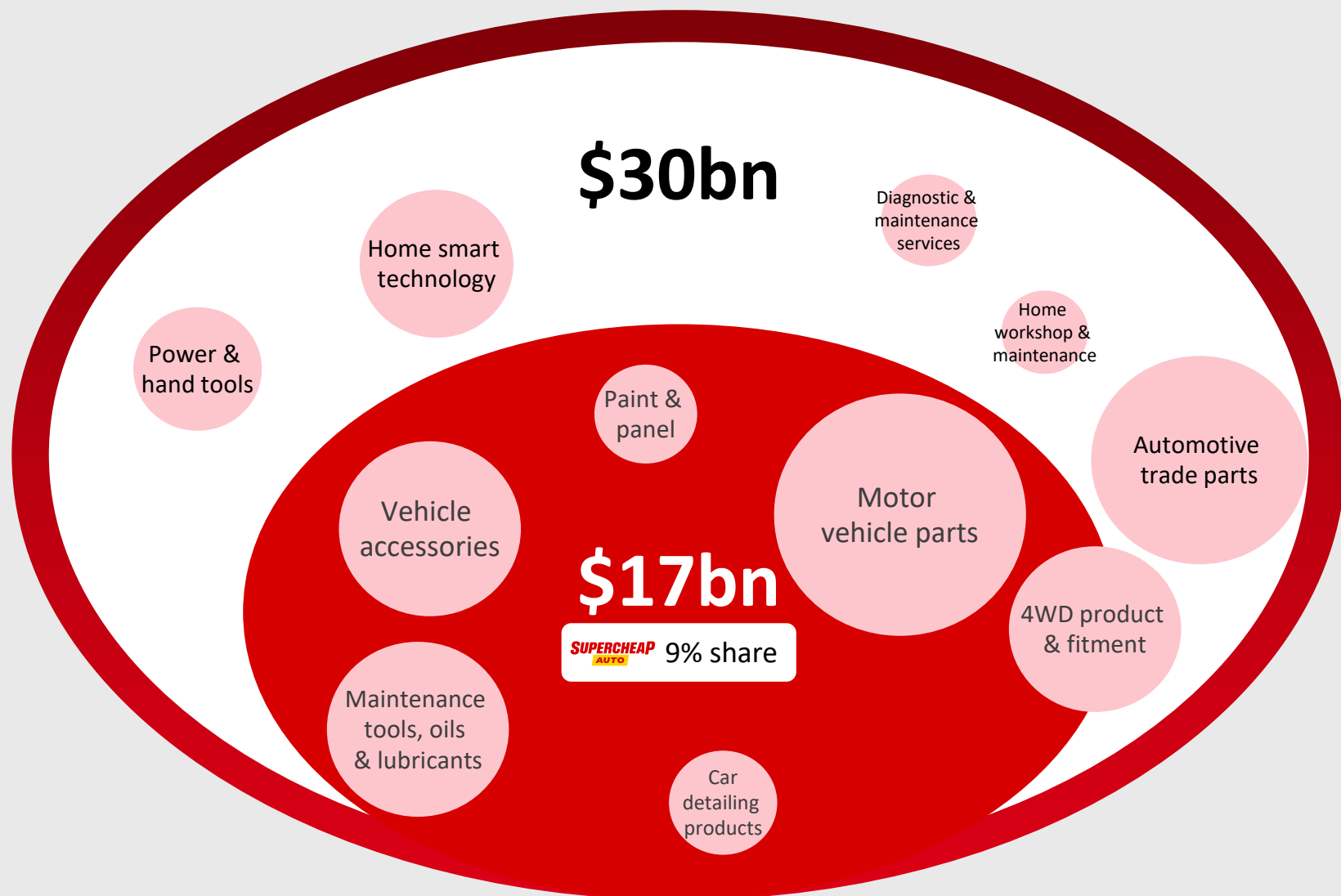
- We collaborate with over 350 highly engaged and capable partners worldwide
- These range from agile small businesses to leading multi-national conglomerates, enabling scale, innovation, and flexibility
- Strong supplier relationships are critical to the delivery of our CVP



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Headroom to grow in a \$17bn core auto market

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Strategy on a page

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OUR PURPOSE →

Whoever you are,
whatever you
drive, we are here
to Make it Super

OUR VISION →

To be the
ultimate automotive
destination across
Australia and
New Zealand

OUR CVP →

Famous for range,
trusted advice and
great value
everyday

OUR GROWTH ENGINES

Range

Stocking the range and brands our customers want

Store formats

Evolving our store format and offering

Fitment

Fitting more of what we sell, across more of our network

Maintained by

Continuous improvement
in retail execution

POWERED BY TRANSFORMATION



CUSTOMER ✕

TEAM ✕

FLOW ✕

VALUE ✕

FOUNDATIONS

Stocking the range and brands our customers want

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4WD & outdoor customer

- Introducing new 4WD brands to drive credibility
- Increasing national brand share in tools through 'best' brands

Examples



RHINO-RACK
MAKE SPACE FOR ADVENTURE

Car enthusiasts

- Introducing and expanding brands our customers want to strengthen our position with 'Project Car' customers
- Offering solutions for key vehicles so we can say "Yes" to more customers



Electric Vehicle (EV) owners

- A range of products available to service the growing EV segment
- Filtration, braking and charging are key categories



Maroochydore Gen5

- Adding over 700 new lines and 20+ new brands to our range



Evolving our store format and offering

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Generation 5 (~1000m²):

- Next-generation store model
- Improved customer experience and operating performance
- Pilot tested and optimised for network rollout

Generations 1-4

- Progressively upgraded through refurbishments and relocations

Small format (~450m²)

- Opportunity for 50 stores nationally
- Scalable model for regional towns
- Expands customer reach and brand presence
- Maintains operational efficiency and profitability

Large format (~2,000m²):

- Opportunity for 30 stores nationally
- Scalable flagship format in priority markets
- Deeper range and stronger fitment capability
- Facilitating expansion of online fulfillment and click and collect
- Distinctive, brand-defining customer experience

SUPERCHEAP AUTO STORE NETWORK

	JUN 19	JUN 26 ¹	JUN 31 ²
Generations 5	-	-	80
Generations 1-4	323	362	315
Small	-	-	10+
Large	-	-	10+
Total	323	362	~415



Fitting more of what we sell, across more of our network



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TRANCHE 1

DSA network expansion

(Dedicated Service Area)

- DSA rollout to existing network FY27
- DSA inclusion in all new network activity FY28
- Currently in 157 of 362 stores in ANZ

TRANCHE 2

Introduce auto electrical fitment

- First trial in Maroochydore G5 store FY27
- Extend trial into large format
- Expansion thereafter *(pending trial results)*

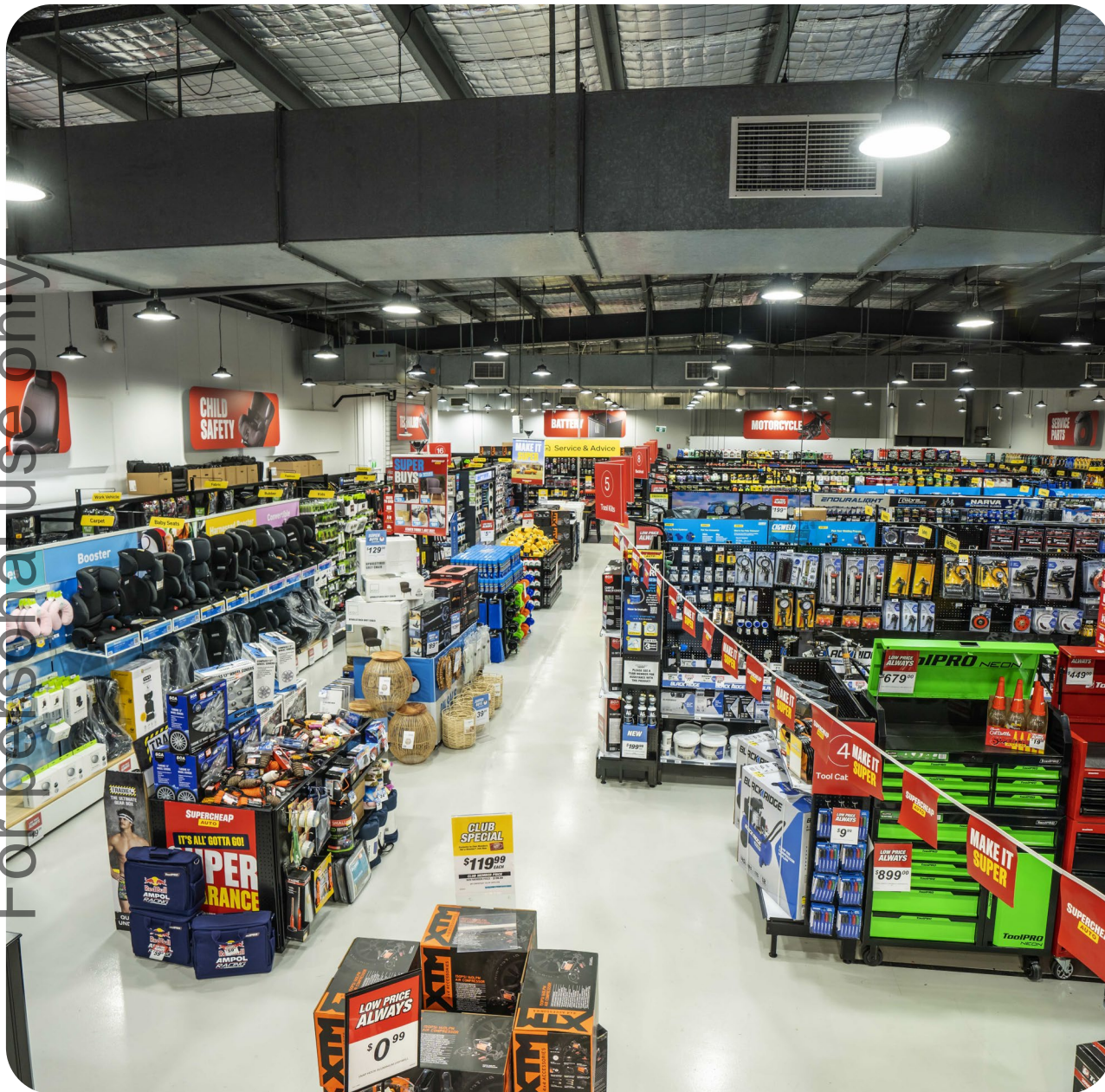
TRANCHE 3

Build 4WD fitment business

- Begin with pre-planning and trial, followed by implementation pending trial results

In summary

- Australia and New Zealand's leading automotive aftermarket retailer
- Headroom to grow in a \$17bn auto market and beyond
- Future growth driven by addressing gaps in our range portfolio, focusing on brands that our customers want, fitting more of what we sell across more of our network, and trialing new large and small formats



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rebel

Jenny Child

Managing Director - rebel



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rebel
BROADWAY
AN EPIC COMEDY

WON

NOW OPEN

rebel rebel rebel

NOW OPEN

NOW OPEN

rebel

Australia's largest multi-branded sporting goods retailer



\$1,362m
FY25 revenue
5% FY19-FY25 CAGR

161
Stores¹

6,400+
Team in stores and
support office

80%
In-store

6%
Click & Collect

14%
Home delivery

--- Omni-retail % of 1H26 sales ---

Who we are

- Australia's largest sporting goods retail specialist, offering apparel, footwear, accessories and equipment
- A multi-branded curator of the world's leading global and emerging sports brands
- Positioned at the intersection of performance, participation and inspiration, serving athletes of all levels
- A scalable omni-retail platform combining destination stores with a strong digital presence

Our customers

- Solo specialists: performance-driven athletes
- Team players: social and team-based sports participants
- Home heroes: customers staying active through at-home workouts

4.3m
Active club
customers²

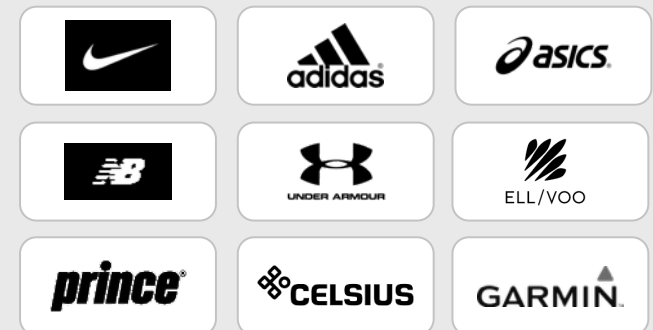
82%
Club member %
of sales²

60%
Brand
awareness³

70
Club member
NPS²

Our range

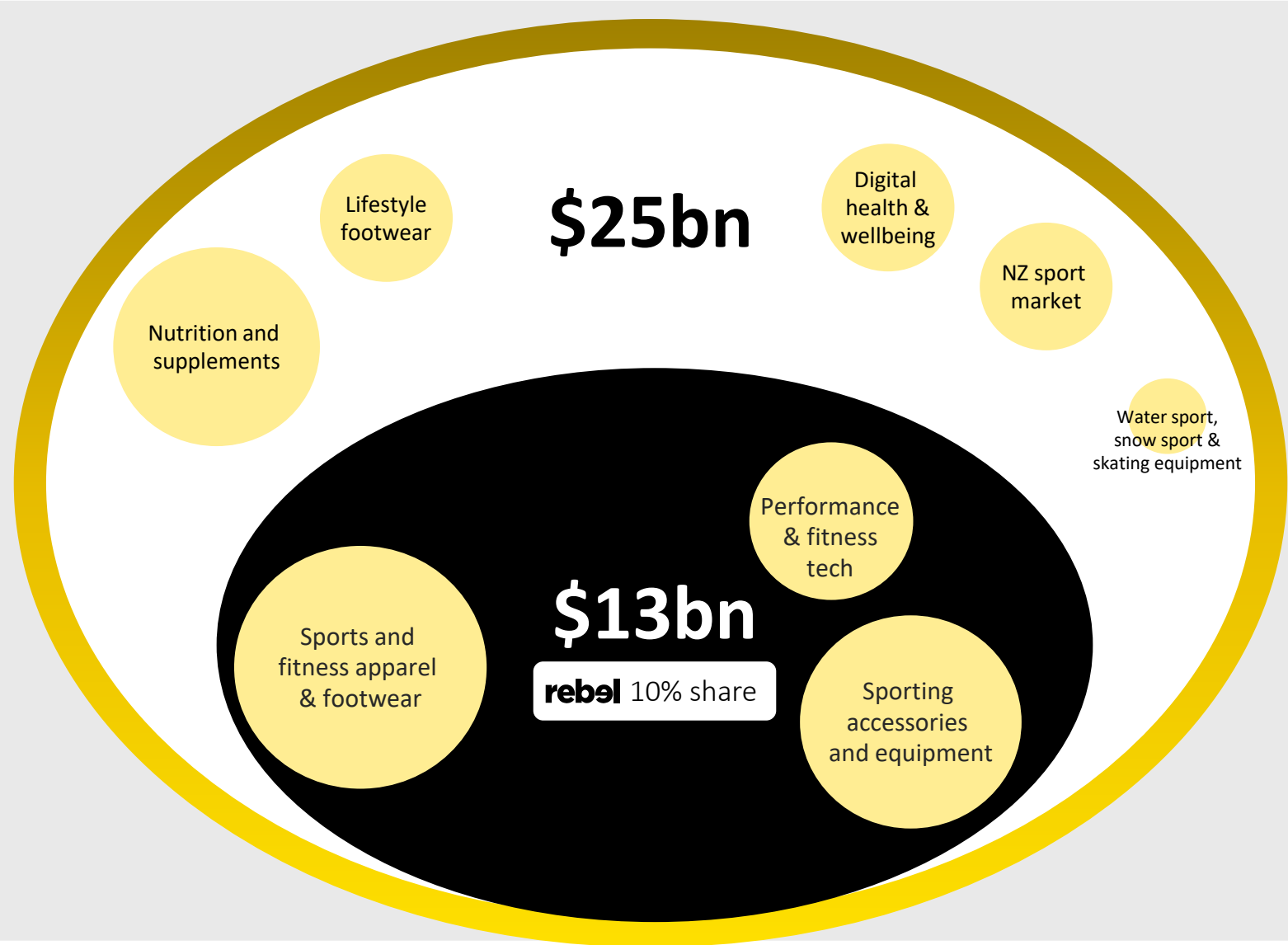
- Strategic partnerships with the world's leading sports manufacturers
- Exclusive distribution agreements with Under Armour, Prince and Puma Football
- Strong performing private label brands in ELL/VOO, Tahwalhi, Celsius



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Headroom to grow in a \$13bn Australian core sports market

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Strategy on a page

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OUR PURPOSE →

To inspire everyone to chase their sporting dreams and passions

OUR VISION →

To be the destination where Australia turns first for sport

OUR CVP →

We differentiate on experience and are famous for product

OUR GROWTH ENGINES

Taking rebel to more regions

Expanding into untapped regional locations with strong sporting communities

Delivering value through private and licensed brands

Broadening our portfolio to additional categories and more price points

Owning sport

Being the go-to destination for Australia's biggest, fastest growing, and most loved sports

Maintained by

Continuous improvement in retail execution

POWERED BY TRANSFORMATION



CUSTOMER ✕

TEAM ✕

FLOW ✕

VALUE ✕

FOUNDATIONS

Expanding into untapped regional locations

REGIONAL CASE STUDY

- Store: rebel Wodonga
- Opened: November 2024
- Local population: ~45,000
- Store size: 1800m²
- Year 1 revenue: \$6m
- Outperforming business case
- Strong contribution margin



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Why regional is attractive

- Contribution margin 200bps higher than network average
- Currently very low penetration by rebel
- Strong sporting communities
- 39 existing regional stores performing well

Further regional opportunity

- Historically targeted catchments >50k population
- New opportunity in 10-50k regional markets
- Targeted towns often include a Supercheap Auto and BCF already
- Enabled by a new, higher productivity store format

Expected benefits

- Attractive returns consistent with existing regional stores
- Lower cannibalisation compared with metro expansion
- Reduced rent risk through non-shopping-centre locations

Towns identified

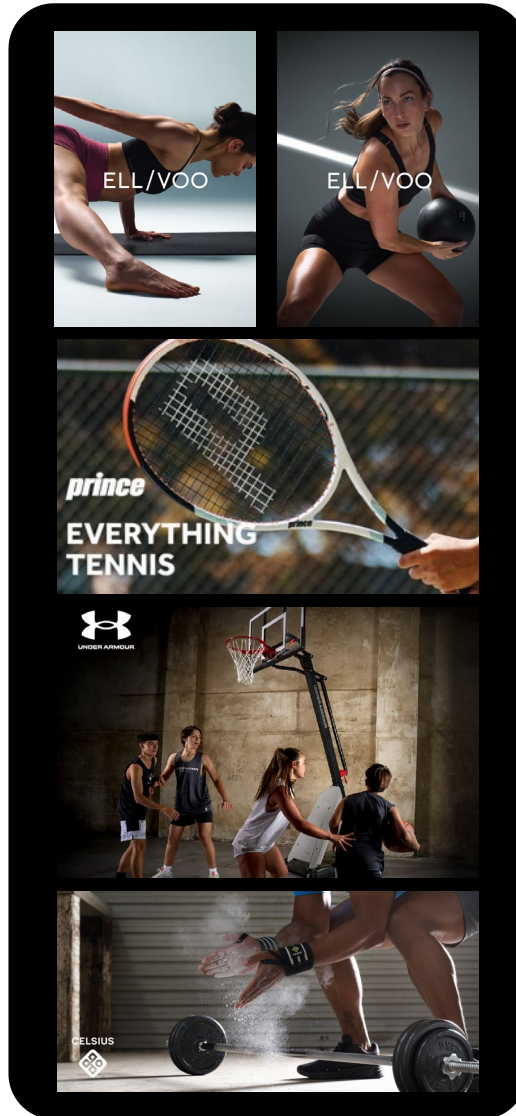
- 50+ regional towns identified as suitable for a smaller regional format
- 30 prioritised for delivery by FY31
- Many have a SCA or BCF store already
- Examples include Goulburn and Grafton

Accelerating growth of our private and licensed brands

Categories and our level of private or exclusive licensed brand penetration

Apparel	Men	None
	Women	Strong
	Teens	None
	Kids	Some
Sport	Performance sports	Strong
	Games, Ride, Hobbies	Some
Fitness	Equipment	Strong
	Accessories	Some

None Some Strong



A well-progressed, highly successful private and exclusive brand portfolio

- Six existing strong private brands driving almost 10% of rebel revenue across multiple categories
- ELL/VOO is rebel's #2 brand in women's apparel, growing from 6th position over the last 2.5 years
- Leverage strong brand credibility of Prince, Under Armour and Puma in Sports categories via licenced exclusive agreements
- Built Verao, Tahwalhi and Terrasphere as our #1 vertical games, ride and hobbies offerings
- Celsius is rebel's #1 brand in Fitness and 7th largest overall for rebel sales

Opportunity to broaden portfolio to additional categories

- Significant opportunity in large categories with no current offer
- Balances portfolio of global brands to meet the consumer demand at more price points
- Opportunity to increase the private and licenced portfolio toward 20% of revenue by FY31
- Supportive of margin expansion

Expanding in the \$13bn core market means elevating our ownership of sport **rebel**

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Owning sport means being the **go-to destination** for Australia's **biggest, fastest growing, and most loved sports...**

- Ranging with authority
- The one-stop-shop for the full kit
- Expertise that earns trust
- Owning the sporting calendar
- Embedded in the community fabric

ONE EXAMPLE CASE STUDY¹

Pickleball

A whitespace opportunity: one of Australia's fastest-growing emerging sports with no clear retail leader yet

155K+

Aussies playing pickleball

Up from ~92K in FY24

+50%

Membership growth YoY

24K+ members in Jan 2026

\$1.7B → \$3.6B

Global market (USD) by 2030

~16% CAGR FY25-30

#3

National membership globally

Behind only the US and Canada



The opportunity for rebel

No clear #1 retailer

Fragmented, niche specialists today – first mover takes scale

Cross-generational reach

Plays across all age groups – teens to seniors

Brisbane 2032 runway

Olympic catalyst lifting grassroots demand

Growing store footprint by 40+ stores over the next 5 years



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Regional

- Majority of new store growth planned in regional areas, including existing regional and smaller regional formats
- Execution includes rCX (e.g. Delacombe, Bathurst), and foundation stores (e.g. Albury, Ballarat)

rCX

- An rCX⁴ store is rebel's upgraded, larger-format experiential store designed to elevate the customer experience and leverages broader range to capture greater market share
- Includes new store opportunities and conversion of Foundation stores through relocations, expansions and refurbishments

Foundation

- Profitable stores with a basic fit-out
- Conversion of legacy rebel foundation and Amart stores to rCX format is ongoing

REBEL STORE NETWORK

	JUN 19	JUN 26 ²	JUN 31 ³
Regional ¹	-	39	70
rCX	-	53	100
Foundation	161	69	35
Total	161	161	~205



1. Mix of rCX (22) and Foundation (17) stores
 2. Anticipated store numbers at 27 June 2026
 3. Represents opportunity not guidance
 4. rCX stands for 'rebel customer experience'

Discipline in nailing the retail basics

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- Maintained by** Continuous improvement in retail execution
- 1 Availability**
Ensuring customers find what they need, when and where they need it
 - 2 Value**
Delivering simple, compelling value that wins customer preference
 - 3 Service**
Raising the standard of in-store service to build loyalty and advocacy
 - 4 Stock loss**
Strengthening controls to safeguard inventory
 - 5 Omni-execution**
Delivering a seamless, high-quality experience for online customers



In summary

- Australia's largest multi-branded sporting goods retailer covering apparel, footwear, sports and fitness equipment and accessories
- Headroom to grow in a \$13bn market underpinned by strong market tailwinds
- Strategically focused on expanding into more regional locations, growing our private and licensed brand portfolio and elevating our ownership of sport
- Obsessed with being our customers first choice for all of their sporting needs

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Michael Wassman
Managing Director - BCF



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Australia's leading outdoor leisure big-box retailer



\$951m
FY25 revenue
11% FY19-FY25 CAGR

170
Stores¹

2,700+
Team in stores and support office

87%
In-store

8%
Click & Collect

5%
Home delivery

--- Omni-retail % of 1H26 sales ---

Who we are

- Australia's leading outdoor leisure big-box retailer, spanning camping, fishing, boating and touring
- A trusted destination for our customers for all their outdoor product needs
- Category leading range breadth, anchored by nationally recognised brands and high performing private brands
- Scaled, destination-led large-format network, with strong relevance and reach across both metro and regional communities

Our customers

- Ambitious adventurers: chasing mastery through challenge
- Capable explorers: curious and capable in the outdoors
- Communal discoverers: adventures are best shared together
- Connected comfort-seekers: family adventure time, made easy

2.8m
Active club customers²

92%
Club member % of sales²

62%
Brand awareness³

77
Club member NPS²

Our trade partners

- Scale and consistency make BCF a strategic wholesale partner within the outdoor category, with many long-standing relationships
- A growing private label portfolio that complements branded ranges and improves customer value

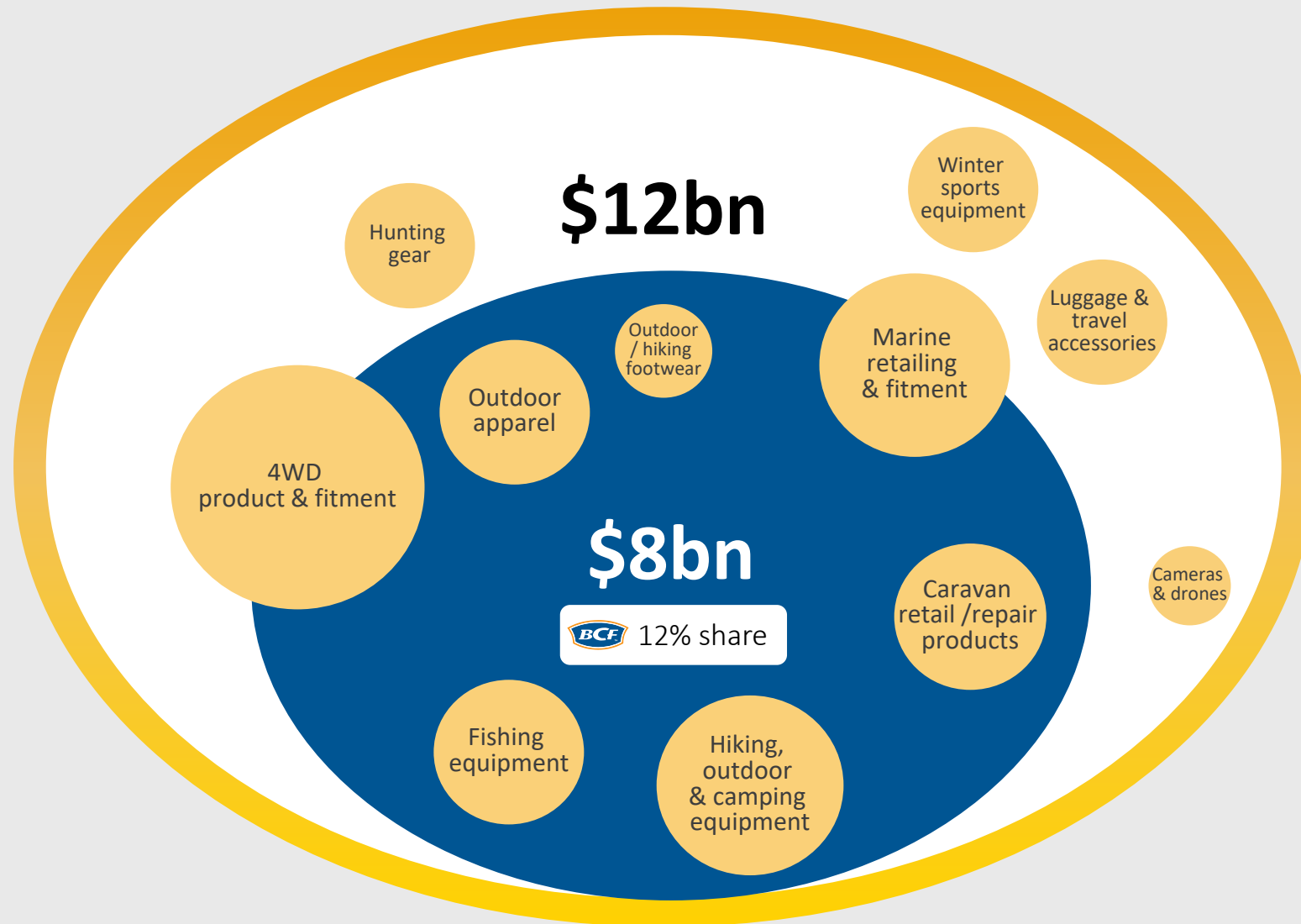


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Headroom to grow in a \$8bn core outdoor leisure market



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Strategy on a page

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OUR PURPOSE →

Giving Australians an outdoor store that they trust, delivering range, quality, value and expert service

OUR VISION →

To be Australia's #1 outdoor store, obsessed with being locally relevant

OUR CVP →

Famous for our product range & quality brands, differentiate on experience, deliver on value

OUR GROWTH ENGINES

Continued roll out of Superstores

Building on the strong momentum from the first seven

Large formats

Expanding our network of larger format stores

4WD fitment

Unlocking access to 4WD market through fitment

Maintained by

Continuous improvement in retail execution

POWERED BY TRANSFORMATION



CUSTOMER ✕

TEAM ✕

FLOW ✕

VALUE ✕

FOUNDATIONS

Superstores - building on the strong momentum from the first seven stores



What is it?

- Destination-led flagship format building brand authority in key growth categories through enhanced range, category immersion, and customer experiences
- 3500m²+ format targeting specific high-volume catchment areas

Why it matters

- They facilitate expansion of range well beyond the capability of a fleet store, which is an enabler of capturing share and pursuing the headroom in our core outdoor leisure market
- Enables a broader omni channel fulfillment capability and expands click and collect access across a broader range of products
- Superstores generate higher visitation, more items per basket and higher average item value than fleet stores, resulting in a substantial increase in total revenue per store

The ambition

- BCF opened its 7th superstore, and first in NSW at Taren Point in May, and is targeting over 20 superstores nationally



Higher visitation

More items per basket

Higher average item value

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Expanding our network of larger format stores

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What is it?

- Broader, locally relevant range and enhanced customer experience
- 2500m² format combining superstore design and learnings, lifting productivity and enabling faster rollout through more accessible site availability

Why it matters

- Significantly higher SKU range versus a standard fleet store
- Large format stores generate substantially higher revenue per store in a more capital-efficient footprint, growing sales and market share
- Enables deeper category immersion (e.g. fishing tackle store, land and power, 4WD and caravan), strengthening BCF's differentiation versus competitors

The ambition

- Accelerated rollout to 40+ sites across the network
- Combination of new sites, conversions and relocations targeting high-growth metro and regional catchments
- Supports long-term strategy to grow BCF's share of the \$8bn core outdoor leisure market and beyond

2500m²
Target store footprint

40+
Target sites in network

Higher
SKU range vs fleet store

Unlocking access to 4WD market through fitment

Phase 1 TRIAL

Specialist-supported pilot store

Phase 2 SCALE

Expand to priority sites

Phase 3 NATIONAL ROLLOUT

50+ sites with full fitment capability

Capture a structural growth category

- ~\$3bn 4WD product and fitment market, growing ~7% CAGR
- High value 4WD fitment products (protection, suspension, electrical) present new growth engine opportunity for BCF
- ~90% of premium 4WD products require fitment

Pivot from product only retailer to total solution provider

- Instore fitment bays: bull bars, suspension, snorkels, electrical
- Shift from "sell a product" to "deliver a complete solution"
- Unlock higher transaction values, margin, and service revenue

Scale a defensible, service led advantage

- Target 50+ fitment locations nationally over time
- Leverage store footprint to enable rollout at scale
- Deliver a trusted, convenient, one stop solution for our customers



BCF
4X4 FITMENT

50+

Target fitment sites

~\$3bn

Total addressable market

Building a flexible multi-format network strategy



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Superstore (3300–4000sqm)

- Destination-led flagship format building brand authority in key growth categories through enhanced range, category immersion and customer experiences

Large format (2200–2750sqm)

- Scalable growth format driving stronger brand execution across core categories and priority catchments, supporting productivity and market share growth

Fleet (1200–1750sqm)

- Core network format delivering a consistent and compelling customer proposition while reinforcing BCF's position in local markets
- Progressive decline due to conversion to the larger store format and optimisation of the network

Small (<1000sqm)

- Locally relevant format providing convenient access in regional and smaller trade areas, maximising sales and earnings

BCF STORE NETWORK

	JUN 19	JUN 26 ¹	JUN 31 ²
Superstore	-	7	20+
Large	-	3	30-40
Fleet	126	108	95
Small	10	52	50
Total	136	170	190-200



In summary

- Australia's leading outdoor leisure big-box retailer
- Headroom to grow in a \$12bn market with strong tailwinds
- Strategically focused on expanding number of Superstores and into larger format retail, and unlocking greater access to the 4WD market

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Reuben Casey
Managing Director – Macpac



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New Zealand's heritage outdoor technical brand



\$231m
FY25 revenue
9% FY19-FY25 CAGR

65
AU stores

38
NZ stores

103 stores¹

1,200+
Team in stores and support office

83%
In-store

3%
Click & Collect

14%
Home delivery

Omni-retail % of 1H26 sales

Who we are

- A specialist outdoor adventure brand with deep heritage in technical hiking apparel and equipment
- Designed for customers who demand performance, durability and credibility in challenging environments
- A vertically integrated brand, controlling design, quality and sustainability standards end-to-end
- Strong brand equity in New Zealand, with a growing presence across Australia

Our customers

Our two priority customer segments are:

- Millennial adventurers: experience-led, digitally native, prioritising versatility, value and sustainability
- Legacy explorers: loyal, established outdoor enthusiasts, valuing trust and durability

Sustainability commitment

- We work tirelessly to do the least harm possible when producing gear
- We aim to make durable clothing and equipment that lasts
- We offer a repairs service to keep your gear out there for longer
- We use responsibly sourced materials, which use fewer resources and harmful chemicals during production

Our partners



900k
Active club customers²

81%
Club member % of sales²

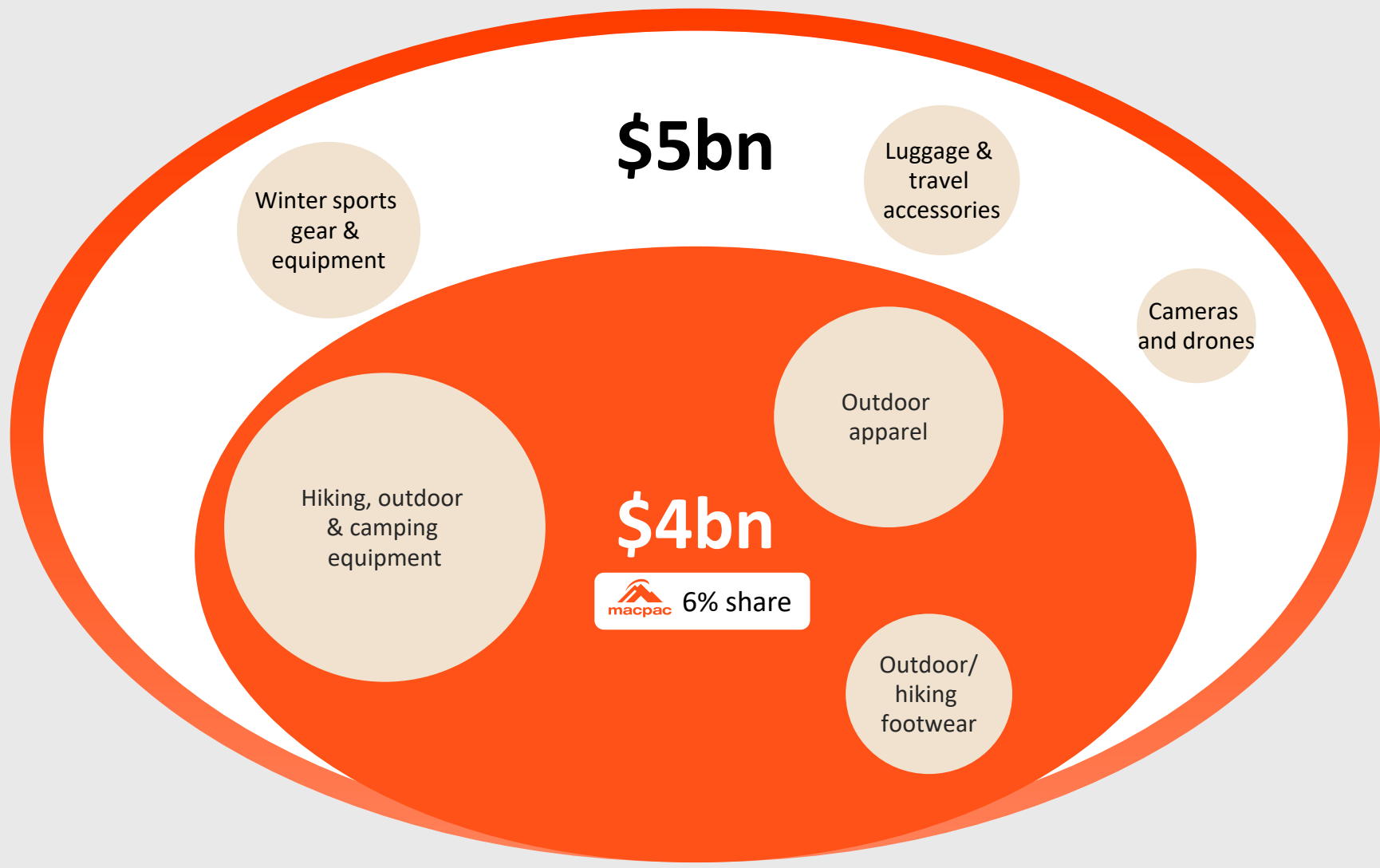
75
Club member NPS²

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Headroom to grow in ANZ's \$4bn core outdoor adventure market



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Strategy on a page



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OUR PURPOSE →

We equip outdoor enthusiasts to adventure better

OUR VISION →

Be the leading technical outdoor brand in Australasia

OUR CVP →

Quality outdoor gear, made responsibly, trusted to last in any environment

OUR GROWTH ENGINES

Product

Creating brand distinction through technical, quality product

Brand awareness

Growing brand awareness in Australia

Network

Expanding the Macpac network across Australia and optimising for profitable growth

Maintained by

Continuous improvement in retail execution

POWERED BY TRANSFORMATION



CUSTOMER ✕

TEAM ✕

FLOW ✕

VALUE ✕

FOUNDATIONS

Creating brand distinction through technical, quality product



Activity focused

Hike - a blend of rugged performance, sustainable innovation and connection to the outdoors; aspiration to be the “Home of Hike”

Trail - gear that fuses ultralight performance, technicality and a connection to the outdoors

Outdoor Lifestyle - heritage-inspired gear that blends comfort, durability and functional design

Adventure Travel - from airport terminals to forest trails, gear that blends outdoor credibility and functional design

Alpine series

- Pinnacle product for the serious alpinist or adventurer
- Purpose-built design in collaboration with NZ Alpine Team, and tested in the Southern Alps

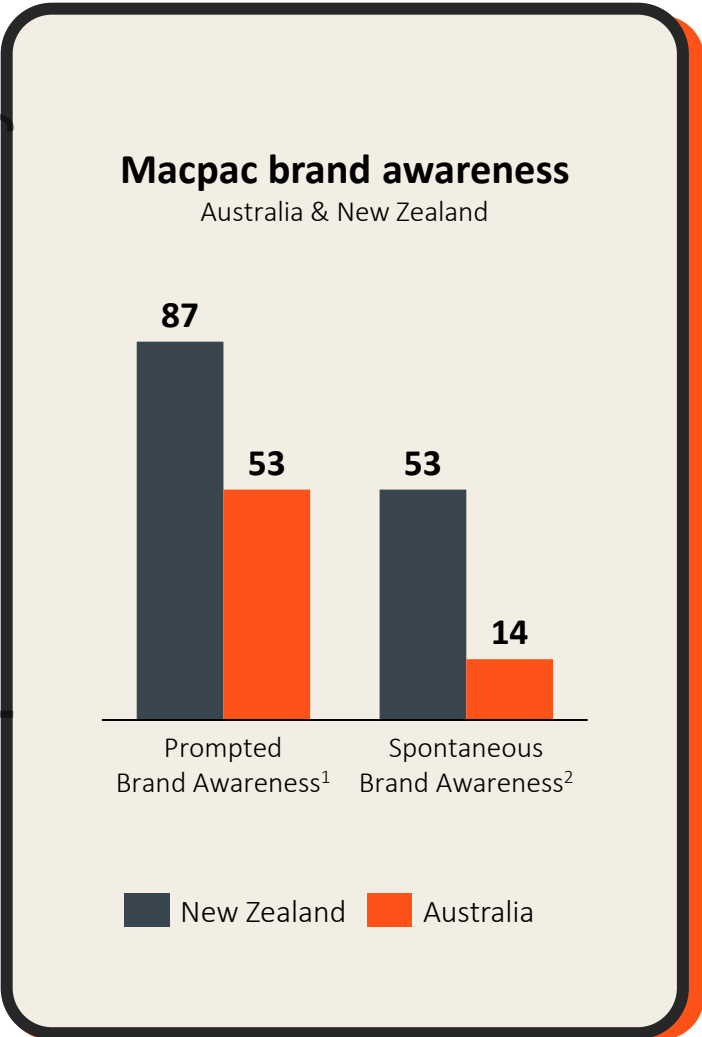
Constantly innovating

- Partnering with leading technical and sustainable materials – Pertex®, ExpeDRY®, CORDURA®, Brrr° Triple Chill Effect®, Primaloft
- An aspiration to achieve 90% Bluesign approved materials in our range (where possible)
- Holding ourselves accountable to Responsible Wool (RWS) and Responsible Down (RDS) certified international standards

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Growing brand awareness

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Major growth opportunity in Australia

- Largest growth market with lower awareness
- Strong category participation signals clear headroom

Brand storytelling works

- ‘Precarious’ campaign delivered measurable uplift
- Key driver of awareness and consideration

Momentum building

- Australian awareness at an all-time high
- Driven by storytelling and growing physical presence
- Stronger salience, credibility and affinity — with more upside

Network expansion opportunity

- Expand Macpac’s Australian store network
- Further leverage BCF and rebel stores to increase awareness

1. Source: Stellar Market Research, Q3 FY26 results, Q: Which of the following outdoor recreational stores have you heard of before today?

2. Source: Stellar Market Research, Q3 FY26 results, Q: Thinking about the outdoor recreational stores, where you would go to buy these types of items, which stores can you think of?

Expanding the Macpac network across Australia and optimising for profitable growth



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Explorer

- Key format for driving brand awareness in Australia
- Often the first interaction with the brand for the customer in high traffic locations, such as key shopping centres, with a moderate sized footprint (250-350 sqm) stocking full range of Macpac branded product and rationalised National Brand offer

Adventurer

- True brand experience for outdoor adventurers to get access to all gear requirements and technical knowledge via full range of Macpac branded product and curated, extended national brand offer. Supports online fulfilment
- Our largest store footprint (600-800 sqm), located in established outdoor precinct

Outlet

- Key to supporting clearance and stock rationalisation. Meets value price point for price conscious customer
- Our smallest store format (200-300sqm) located in outlet locations, across malls and destination locations

Other channels

- Opportunity to develop Macpac range across ~330+ BCF and rebel stores in Australia, including trialling new operational concepts to reach customers
- Airport retail, with trials at Cairns and Christchurch Airports

MACPAC STORE NETWORK

	JUN 19	JUN 26 ¹	JUN 31 ²
Rays	9	-	-
Explorer	61	70	80
Adventurer	-	16	20
Outlet	-	17	15
Total	70	103	~115



In summary

- Vertically integrated brand with New Zealand heritage, differentiated on technical credibility
- Headroom to grow in a \$4bn outdoor adventure market
- Key unlock will be growing brand awareness, particularly in Australia, as well as creating greater brand distinction through technical, quality product and optimising the Macpac network across channels

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Q&A

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Paul Bradshaw
Group Managing
Director and Chief
Executive Officer



David Burns
Chief Financial
Officer



Ben McConnell
Managing Director -
Supercheap Auto



Jenny Child
Managing Director -
rebel



Michael Wassman
Managing Director -
BCF



Reuben Casey
Managing Director -
Macpac

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3

Transformation

Mandy Ross
Chief Transformation Officer



Customer expectations are rapidly evolving

Advantage comes from execution at scale

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Multi-channel

“I can buy online, click and collect in-store, my brand loyalty is being recognised. Returns are channel agnostic - some omni, but not end-to-end.”



Omni-channel

“My shopping experience is more integrated – I begin most of my shops online. Everyone has a loyalty program nowadays and shopping offers are more tailored to me. AI is fast becoming how I discover and decide.”



Customer intent-led

“As I explore, I can ask questions naturally and get guided in real time. Intelligent assistants and team members work together to recommend, support and act for me - making it faster and easier to find my product and buy.”

Ignite will enable our brands to deliver their growth ambitions over the next five years

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A people-led, technology-enabled program

CUSTOMER ✖
Meeting customers where and how they shop

TEAM ✖
Helping teams perform at their best

FLOW ✖
Streamlining end-to-end retail processes

VALUE ✖
Sustainable cost advantage

Embedding digital, data, AI and process foundations that enable integration and scale



Digital and agentic retail capabilities will meet our customers where and how they shop



Enhancing today's shopping experience and building capability for what comes next

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Discover

Modern discoverability
Our products, stores and services discoverable in ChatGPT, Gemini and beyond

Decide

Guided product selection
AI agent matches the right product to a customer's car, adventure or sport context

Engage

Connected customer identity
One customer profile across four brands. Journey, content and offers personalised to each customer

Buy

Frictionless transactions
One checkout, fast and flexible fulfilment, returns in a tap. Ready for AI agents to buy

Supported by a partnership spanning commerce, customer engagement, service and agentic retail technologies

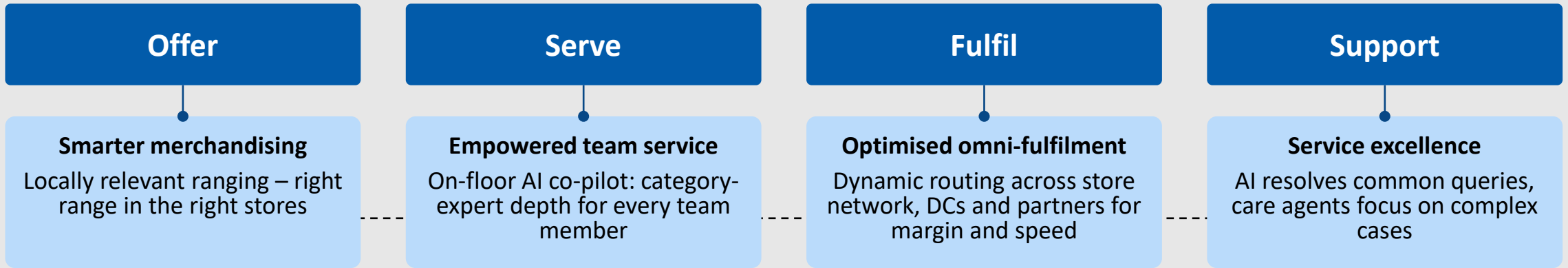
Four brand experiences. One capability

Equipping our teams to execute retail fundamentals simply and at scale



Creating consistency in everyday execution to build a scalable advantage

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Empowering teams with AI-enabled support, insights and skills. Making it easier for team to serve customers and drive performance

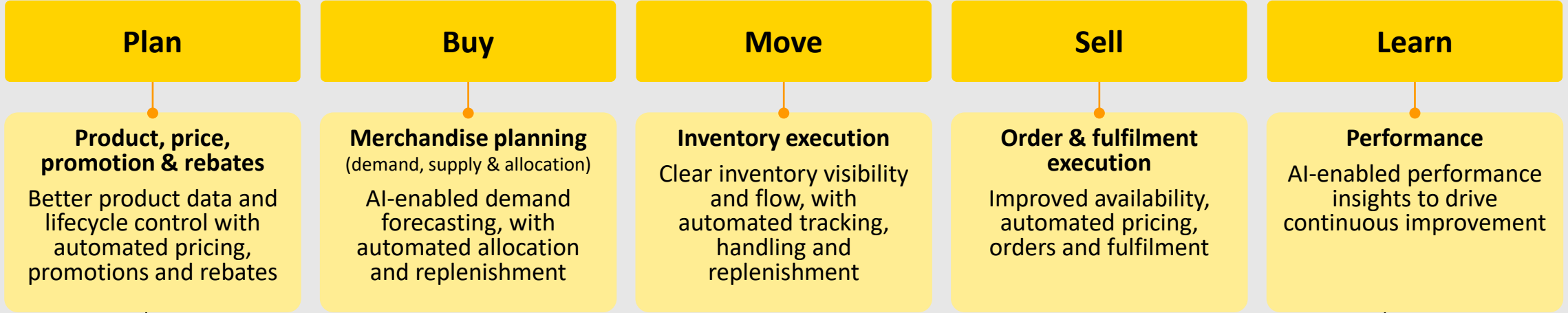
Removing friction, for consistency, scalability and performance

Streamlining and integrating end-to-end retail processes

Evolving our processes and ways of working



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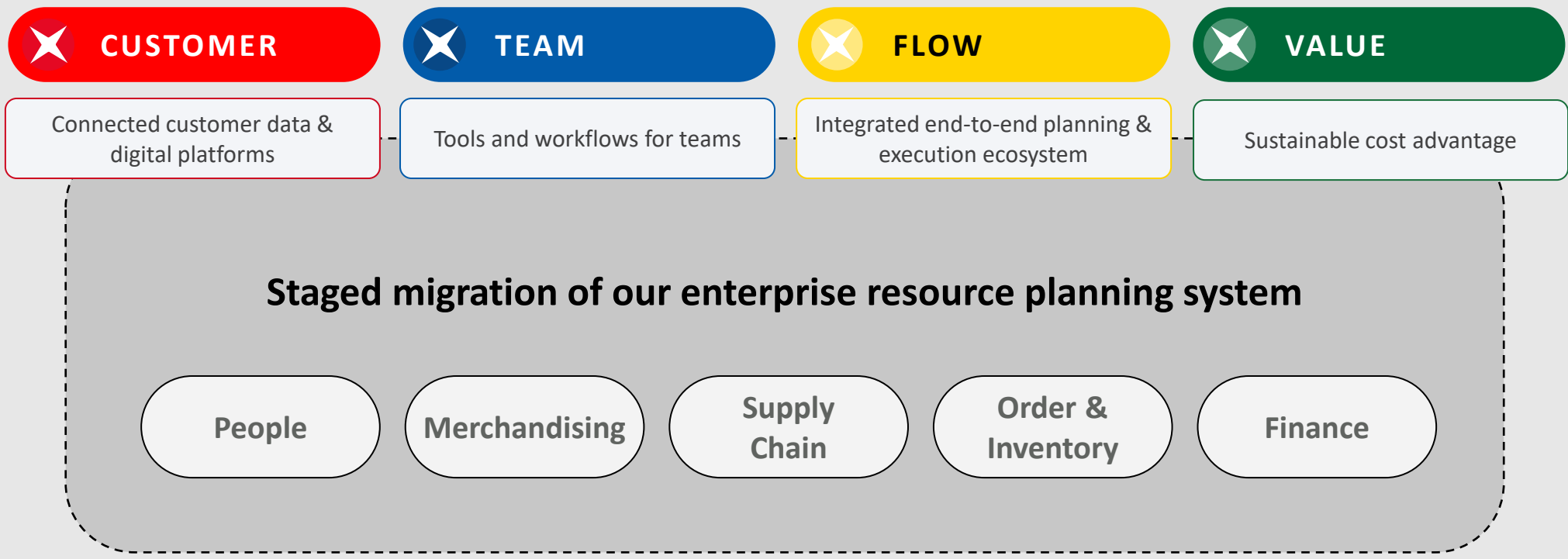
Enabled by modern and integrated best of breed industry solutions providing the data foundations for embedding AI across planning and execution

Right Product. Right Place. Right Time

Modernising our digital core to enable our pillars

Enabling better customer, team, flow and value outcomes through a connected retail core

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Value creation through improved revenue, COGS and efficiencies

Delivering a sustainable cost advantage



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CUSTOMER

- Revenue uplift from improvement in:
 - Customer NPS
 - Qualified search conversion
 - Basket size
 - Online penetration
 - In-store conversion
 - Return on ad spend (ROAS)
 - Member engagement

TEAM

- More efficient processes drive higher quality execution
- Stronger team member expertise delivering better customer experience and in-store conversion
- Team more empowered to maximise value from trade partners
- Lower centralised costs from more efficient support centre

FLOW

- More accurate forecasting leading to improved ranging and availability
- Higher full-price sell-through, reduced clearance
- Faster stock turn and tighter working capital
- Procurement savings through improved buying discipline
- Lower supply chain cost per unit

Value will be realised through increased revenue and gross margin expansion, cost savings will be utilised to fund growth and transformation

The *Ignite Program* will transform our business

A people led, technology enabled program

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Meeting customers where and how they shop

- ✓ Easier, seamless shopping experience
- ✓ Reliability customers and AI agents can trust
- ✓ Supporting omni journey



Teams equipped to serve

- ✓ Work that flows without friction
- ✓ Modern, integrated tools
- ✓ Higher impact and performance



Built for growth

- ✓ Shared digital backbone supports every brand
- ✓ Faster to market when conditions change
- ✓ Decisions into action across end-to-end retail processes

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4

Supply Chain

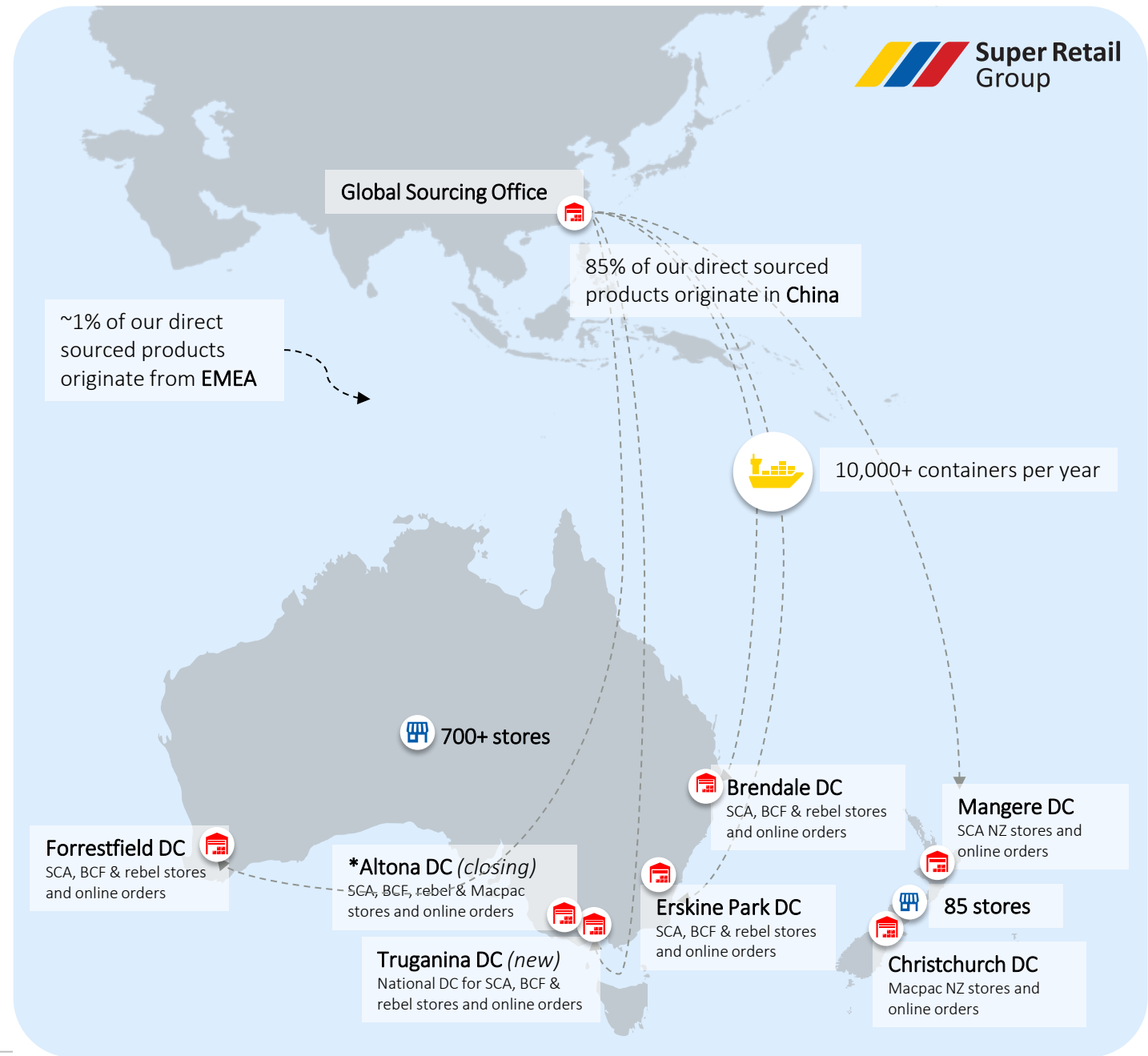
Amy Bentley
Chief Supply Chain & Efficiency Officer



Strong omni-channel supply chain foundations

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- 900+ suppliers across our four brands¹
- Global Sourcing Office in Asia
- 5* multi-brand DCs in Australia
- 2 DCs in New Zealand
- 99+ million units sent to stores and customers
- 280,000+ online orders per year



Modernising our supply chain is essential to meet growth ambitions

From *functional scale* ...

... to an *integrated* model



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1 BUILD **Create capacity**
operationalise automated national distribution centre in Victoria

2 OPTIMISE **Efficient distribution network**
recalibrate distribution centres to work together and efficiently service growth

3 INTEGRATE **Embed standardised solutions**
link planning and forecasting across end-to-end retail processes

Value creation

1

Build

A step change in capacity and capability

- Large scale automation
- Consolidate products suitable for automation
- Benefits:
 - Less manual handling
 - Capacity for growth
 - Foundation for network optimisation
 - Lower operating costs
 - Working capital savings
 - Consolidated deliveries into stores
 - Step change in ability to fulfill online delivery



Stage 1 Build

FY24-FY25



Stage 2 Automate

FY26-FY27

Stage 3 National DC

FY28+

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**Super Retail
Group**



2

Optimise network

One network, more value

- Maximise distribution assets
- Finesse automation utilisation
- Optimise product flow from source to store
- Leverage international operations
- Enhance online fulfilment capability
- Improve product speed to market
- Leverage AI to address process and system roadblocks

Commencing FY27

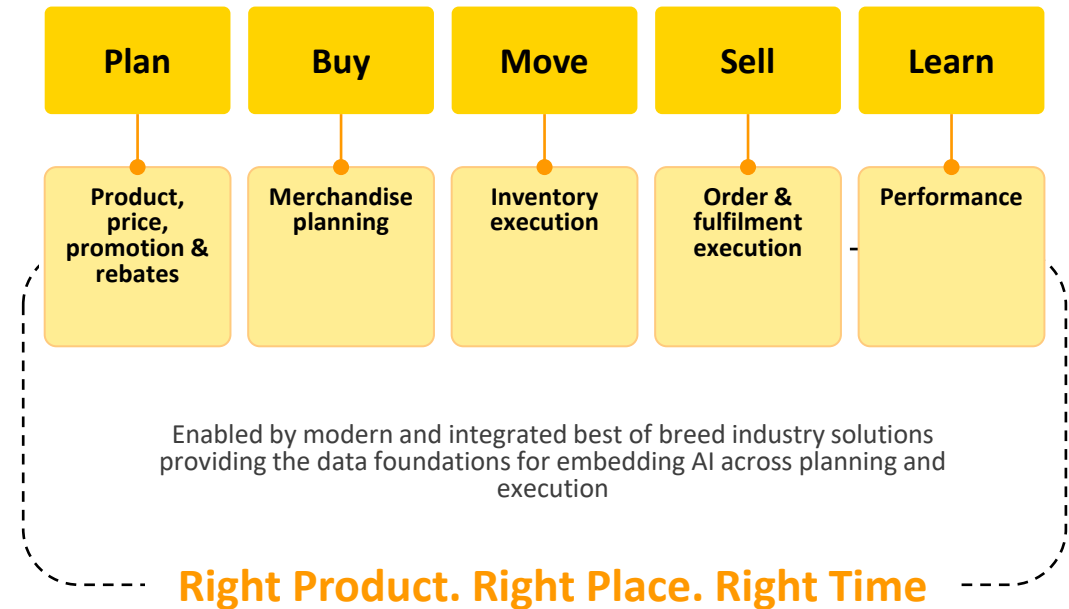


3

Integrate

Integrating end-to-end retail processes

- System-enabled promotions and allocations
- Integrated planning and forecasting system
- Enhanced capacity management
- Benefits:
 - Improve on-shelf availability
 - End-to-end visibility of demand and supply
 - Agile response to changing customer needs
 - Less working capital
 - Consolidated / more efficient deliveries to stores



Commencing FY28

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In summary

Leveraging and optimising our supply chain

- Commissioning new capacity and capability
- Unlock end-to-end efficiencies
- Integrating end-to-end retail processes
- Generate value and support growth ambitions

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Capital Management

David Burns
Chief Financial Officer



Our financial goals

Our goal is to deliver growth in shareholder value in the form of growing earnings and ongoing cash returns

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Grow PBT by mid to high single digit CAGR through to FY31

Sustainable and growing dividends

Maintain balance sheet strength and flexibility

Disciplined allocation of capital in order to maintain ROC above cost of capital

Track record over previous strategic arc: FY19 to FY25

+8.1%
PBT CAGR

>\$1bn
Dividends paid

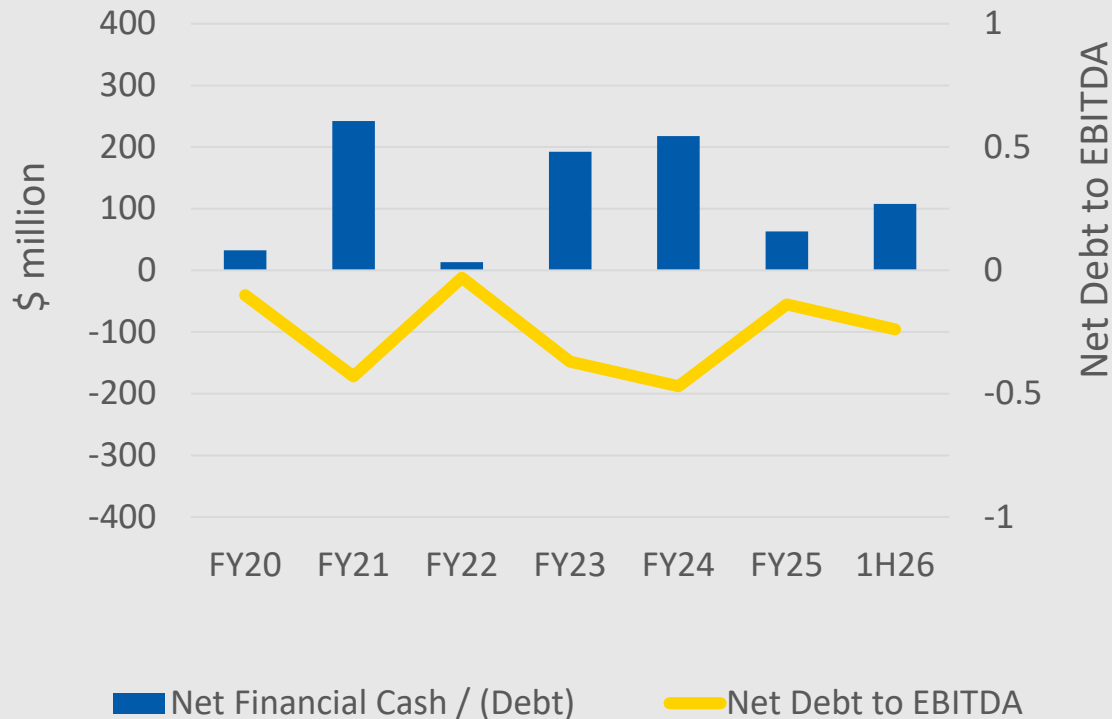
\$63m
FY25 net cash

Highly cash generative business with strong balance sheet

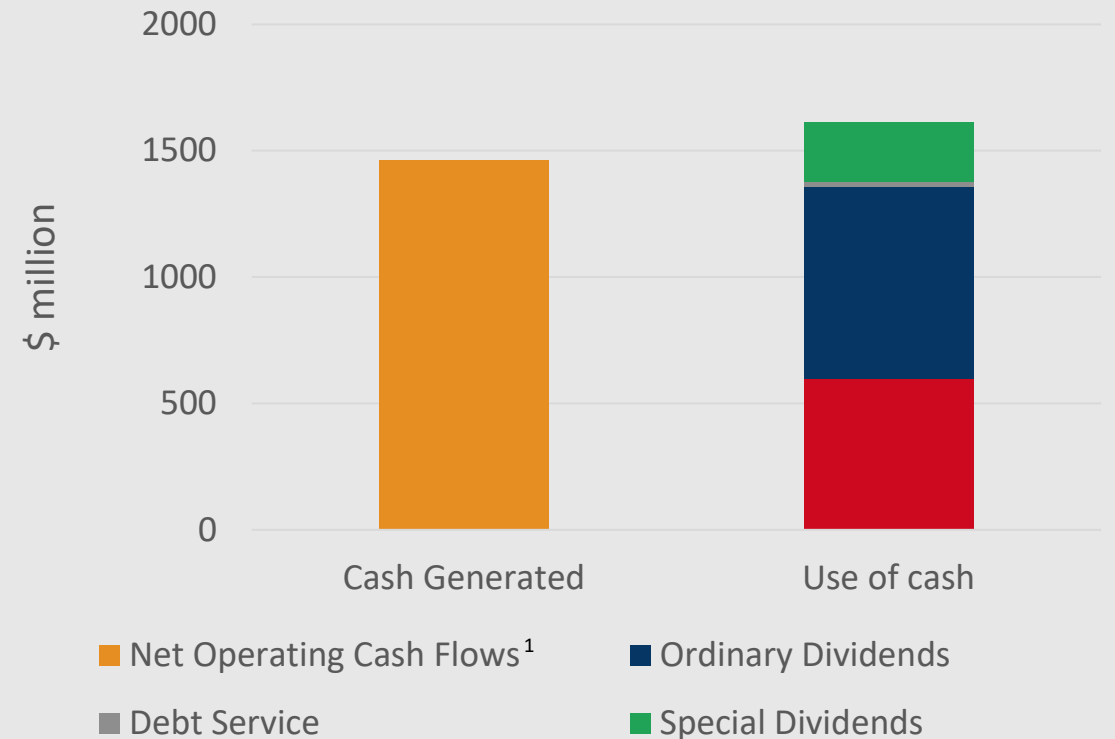
Operating cash flows have funded the annual capital expenditure envelope and ordinary dividends to shareholders, with surplus funds returned via special dividends

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Net debt & gearing



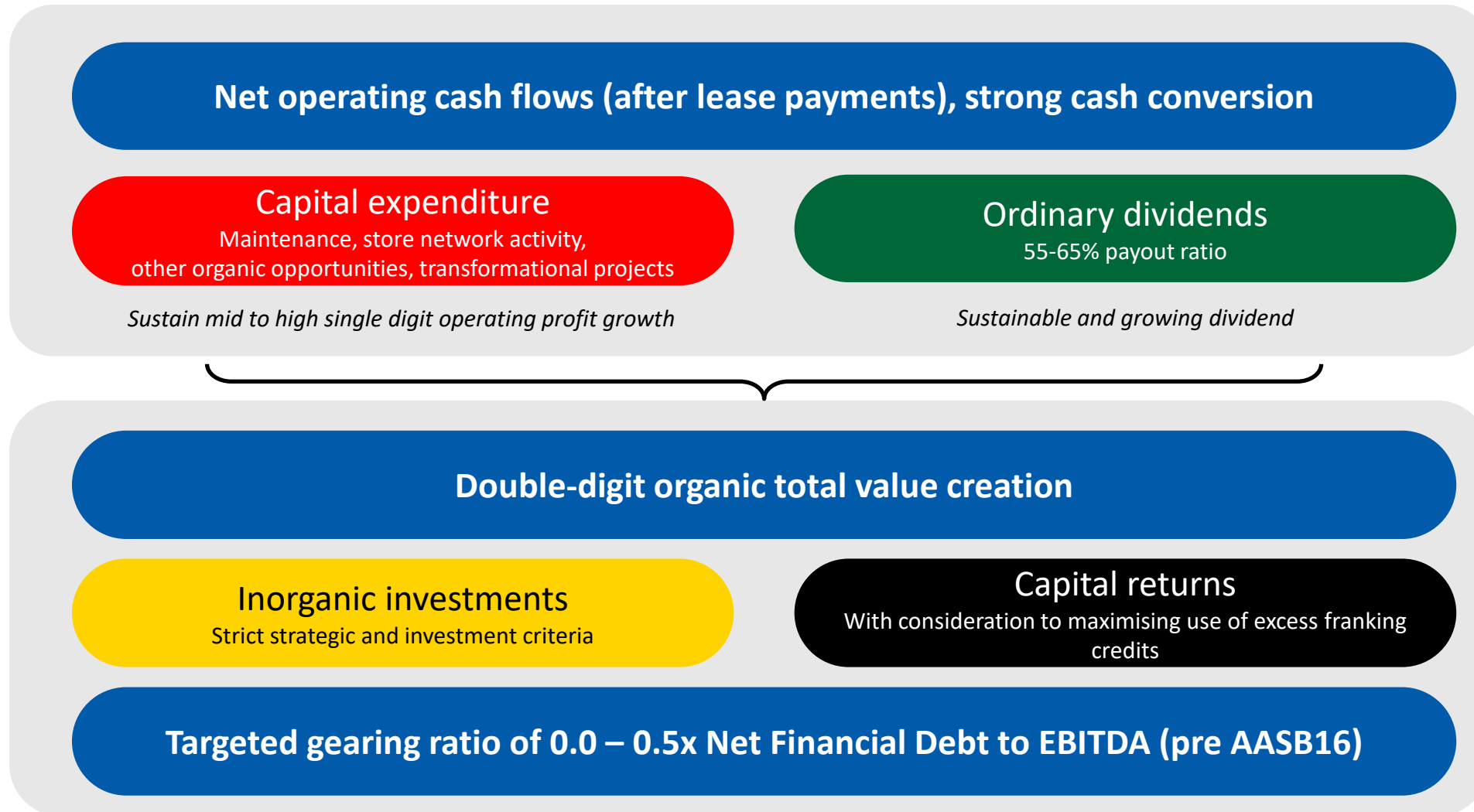
Free cash flow generated, and use of cash FY22-1H26



Capital management framework

We will deliver long-term shareholder value underpinned by strong operating cash flow and sustainable cash returns

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Capital expenditure envelope balances growth and sustaining projects

The next strategic arc will include an increased investment in technology, representing a combination of growth and sustaining investments

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Sustaining capital expenditure

Maintenance

Maintenance capital expenditure to sustain core operations and systems. Includes replacement of end-of-life supply chain infrastructure

Technology

Migration of new ERP as part of the Ignite Foundations strategic pillar, and ongoing investments in support of omni channel and digital capabilities

Network maintenance

Refurbishments of existing stores to sustain competitiveness, revenue and share momentum

Sustaining - positive returns identified, but not always above cost of capital

Targeting >15% ROC from revenue uplift post investment vs baseline of do nothing

Approximately 50% of FY27-31 capex envelope

Growth capital expenditure

Network expansion

Investment in new stores and relocations, supporting the network strategy for each of the four brands

Customer

Investment in the Ignite customer capabilities and leveraging digital and data capabilities that target incremental revenue growth

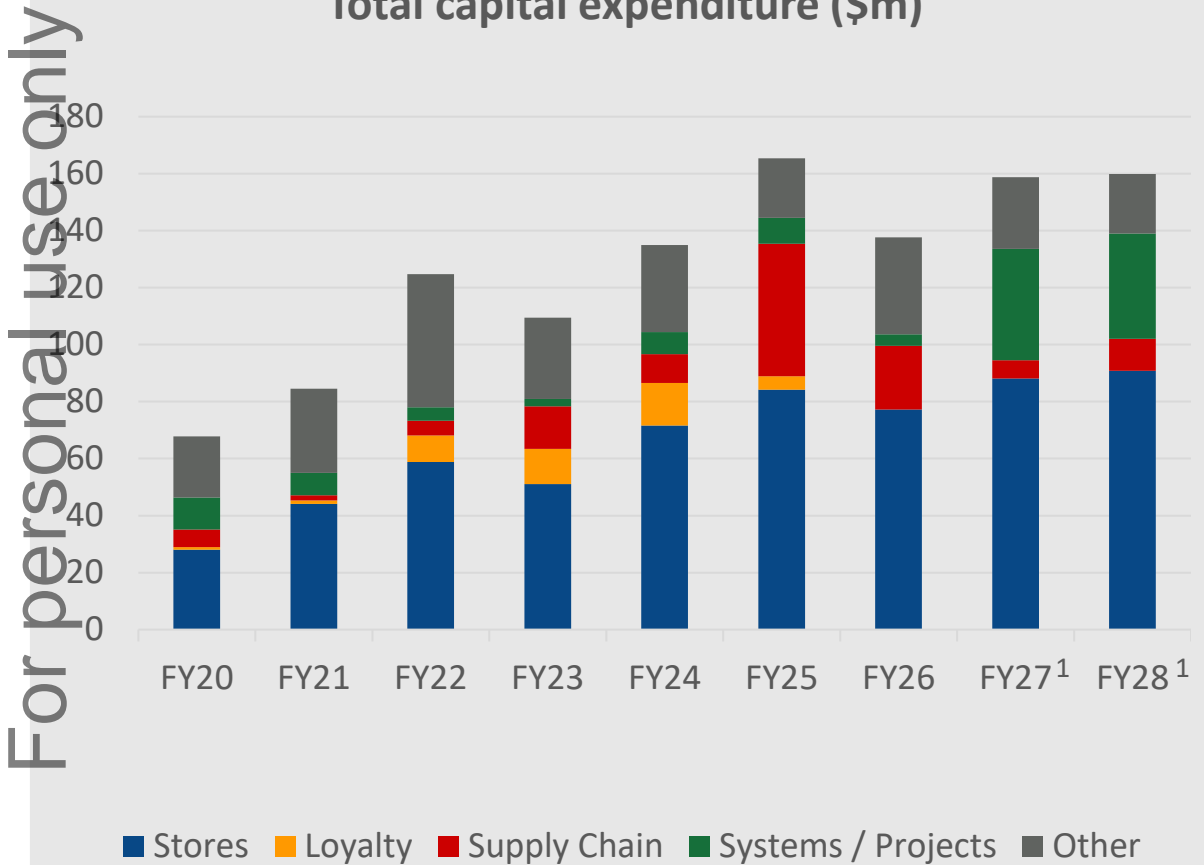
Targeting >15% ROC from investment

Approximately 50% of FY27-31 capex envelope

Investment in stores underpins outlook for capital expenditure

Capex envelope funding store network plan, as well as Foundation investments enabling program Ignite

Total capital expenditure (\$m)



Expected return profiles

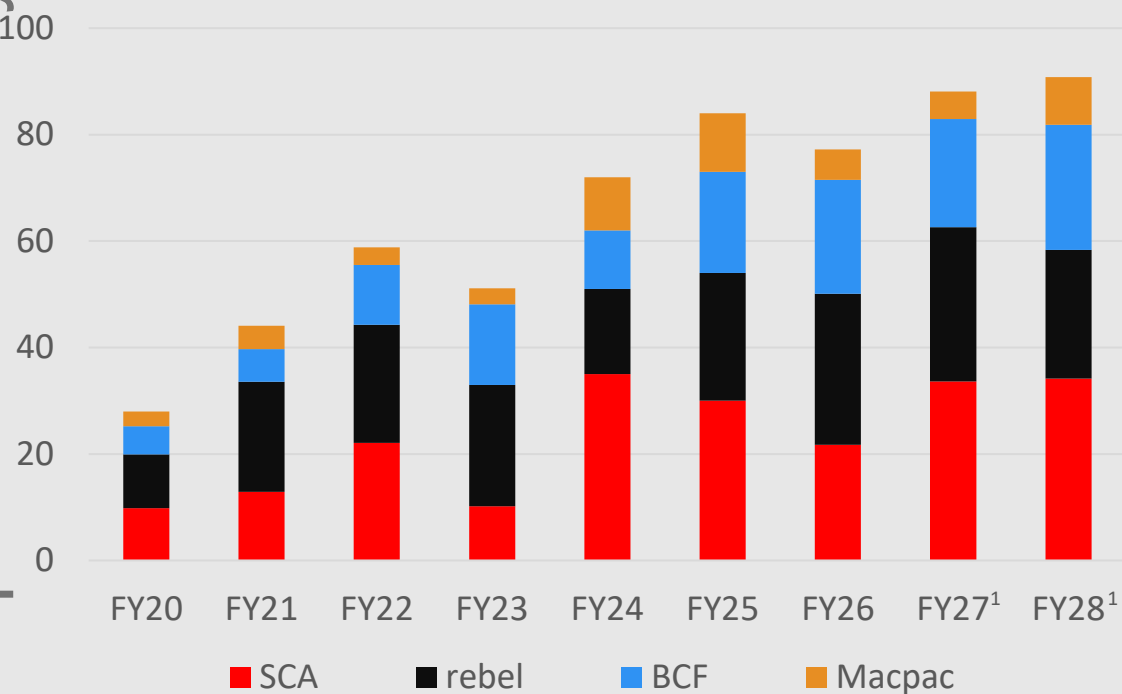
- Store investment spans maintenance, new sites and relocations. New and relocated stores deliver returns above the 15% after-tax ROC target.
- Loyalty investments have contributed to revenue and market share growth, with scope to optimise returns.
- Supply chain investments represent the development of the new Victorian DC, replacing end of life assets and is largely sustaining in nature, with high single digit returns on capital. The investment creates capacity and will enable the delivery of *Flow* benefits in line with our future supply chain initiatives.
- Investment in systems / projects form part of the Ignite transformation program. These include:
 - an ERP migration which is largely sustaining in nature
 - initiatives expected to drive positive revenue and gross margin outcomes, with returns on investment expected to comfortably exceed minimum thresholds

Further opportunity to invest in the store network beyond FY26

We will continue to invest in the store network to improve the customer experience and drive sales growth

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Store network capital expenditure



- Investment supports approximately 300 network actions through to FY31, including new stores and refurbishment / relocation initiatives
- Investment is weighted toward the two largest brands **Supercheap Auto** (Gen 5 and large format trials) and **rebel** (regional expansion). **BCF** will focus on continued roll out of Superstores, and development of large formats. **Macpac** will pursue a measured increase of penetration in Australia
- Returns are greatest from Supercheap Auto, with all brands generating returns above the cost of capital

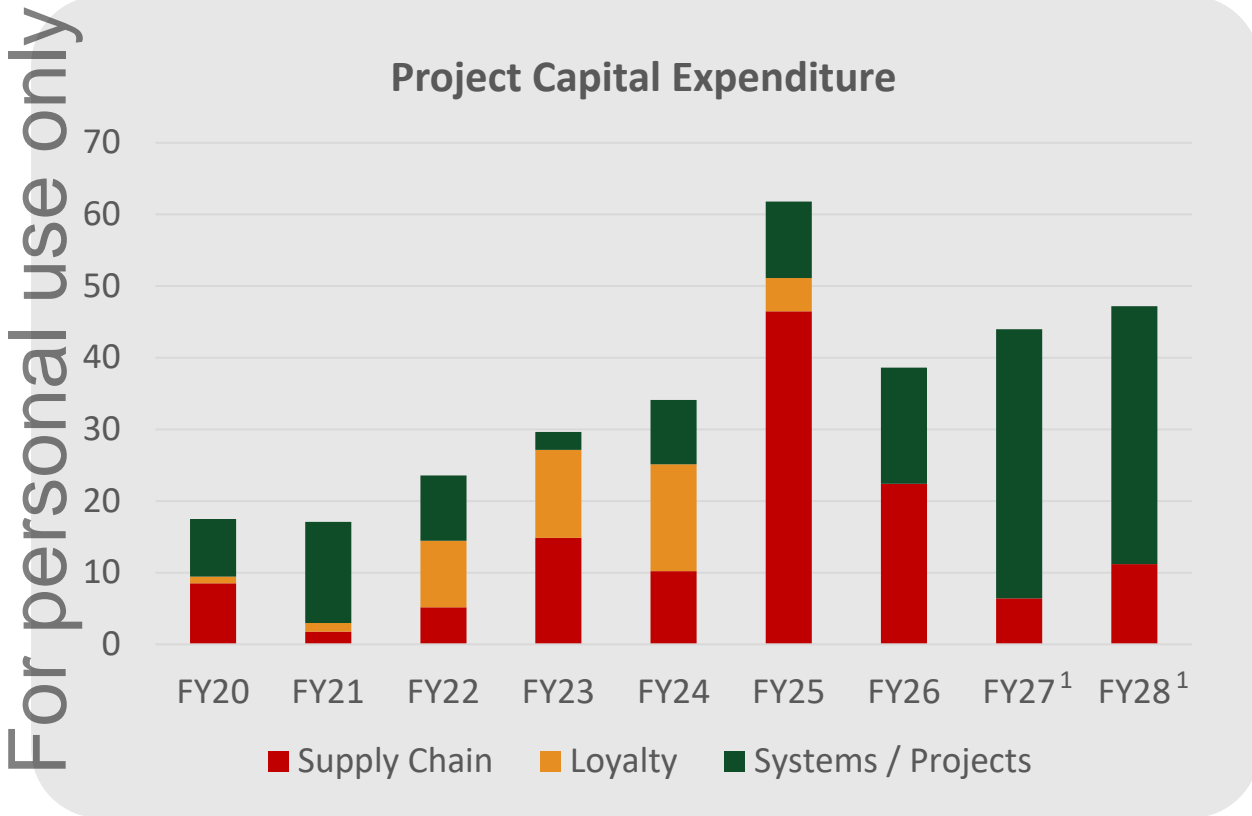
Maintain revenue and market share momentum






Build competitive advantage of both breadth of network and instore customer experience

Deliver attractive returns on capital

Project investment in core capabilities drives competitive advantage

Investments over the previous strategic arc targeted supply chain, omni retail, and customer initiatives aimed at supporting revenue growth, customer experience and increased penetration of online revenue



	Sales CAGR (FY19-FY25)	Customer NPS (FY19-FY25)	Online penetration (FY19-FY25)
	7%	+8 pts	6% to 8%
	11%	+13 pts	7% to 12%
	5%	+13 pts	9% to 18%
	9%	+6 pts ²	10% to 18%
	7%	+11 pts	7% to 13%

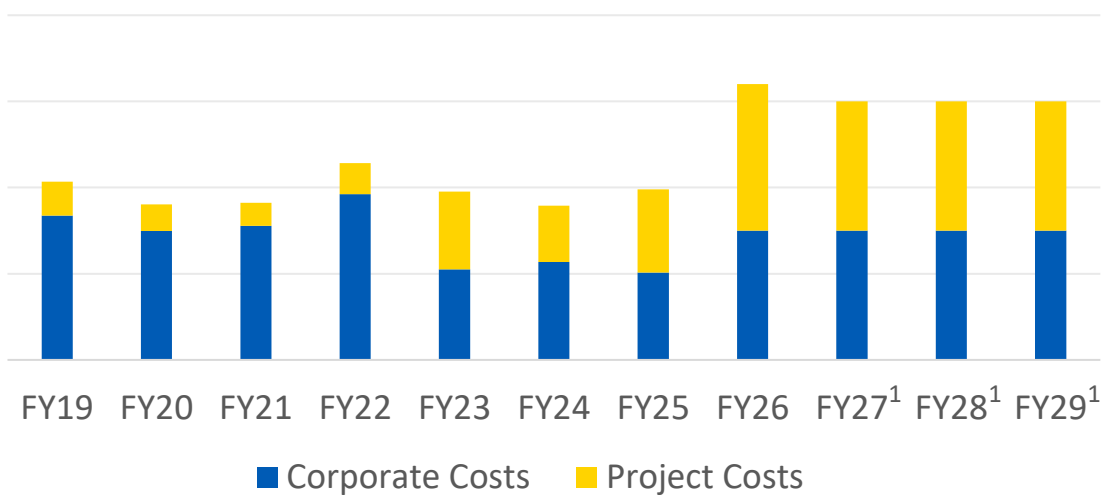
Project spend FY27-FY28 includes initiatives associated with Project Ignite, and is mostly system based – underpinned by a staged migration of our enterprise resource planning system

Group & unallocated costs

Disciplined management of corporate costs, with investments to deliver Ignite and growth initiatives

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Group & Unallocated Costs (\$m)



- Group & Unallocated (G&U) includes corporate overhead costs, and project costs in a development / establishment phase, not yet in use by the brands
- By keeping project costs in G&U, we can more consistently reflect the underlying profitability of the brands
- Corporate costs were lower in FY23-FY25 due to excess cash balances lowering net finance costs over that period
- In the near term, project costs largely relate to the Ignite program, including the migration of our enterprise resource planning system

Ignite will generate cost savings of approximately \$75 million per annum by FY29 which will enable disciplined investment in transformation and growth initiatives

We have a strong balance sheet and operating cash flows

- Strong cash conversion;
- solid balance sheet;
- providing flexibility, resilience and optionality.

A balanced capital program

- Focused on maintaining existing competitive advantage, revenue and market share momentum;
- as well as methodically deploying capital behind growth and transformation initiatives;
- with appropriate minimum required returns on investment.

Guided by a clear Capital Management Framework

- Aimed at generating double digit shareholder value per annum;
- balanced between growth and returns;
- whilst maintaining optionality for future growth;
- and preserving a conservative balance sheet setting.

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Q&A

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Paul Bradshaw
Group Managing
Director and Chief
Executive Officer



David Burns
Chief Financial
Officer



Mandy Ross
Chief Transformation
Officer

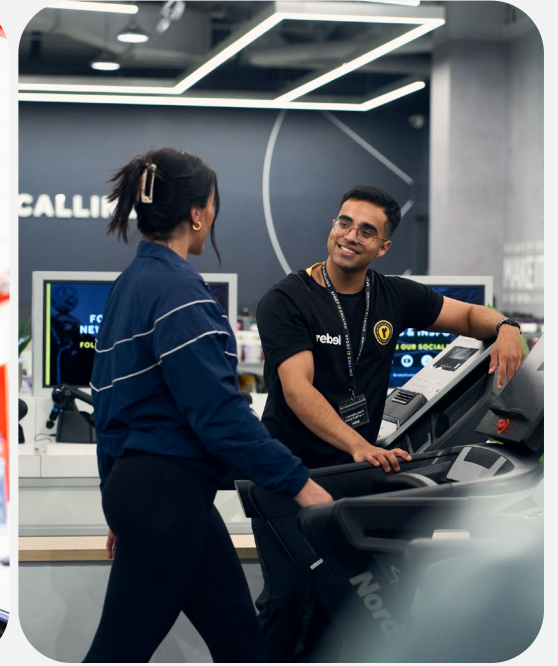


Amy Bentley
Chief Supply Chain and
Efficiency Officer



20
26

Thank you
for joining
us today



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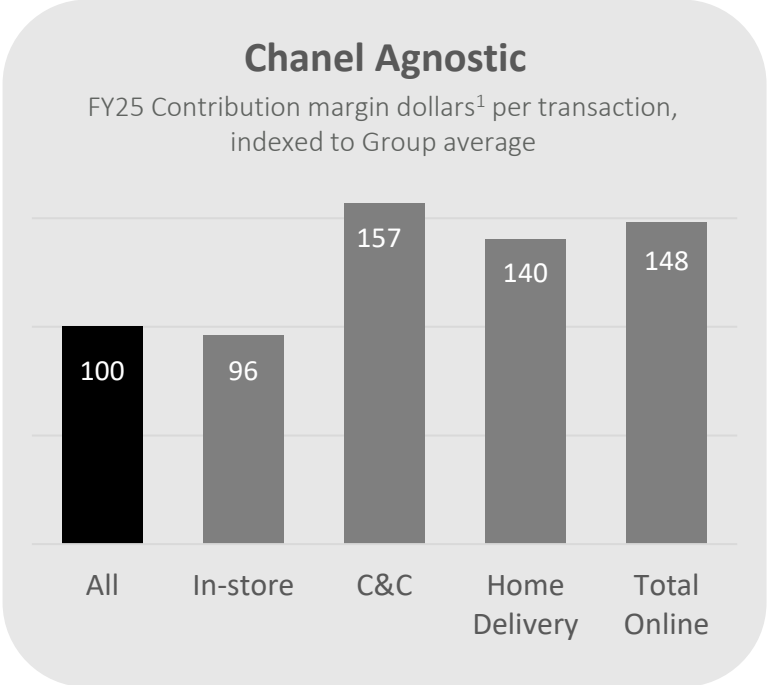
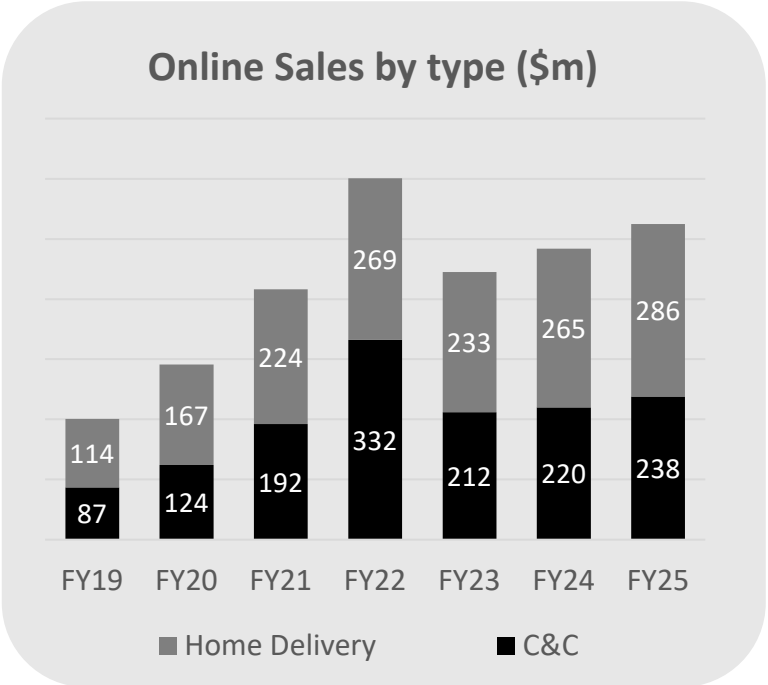
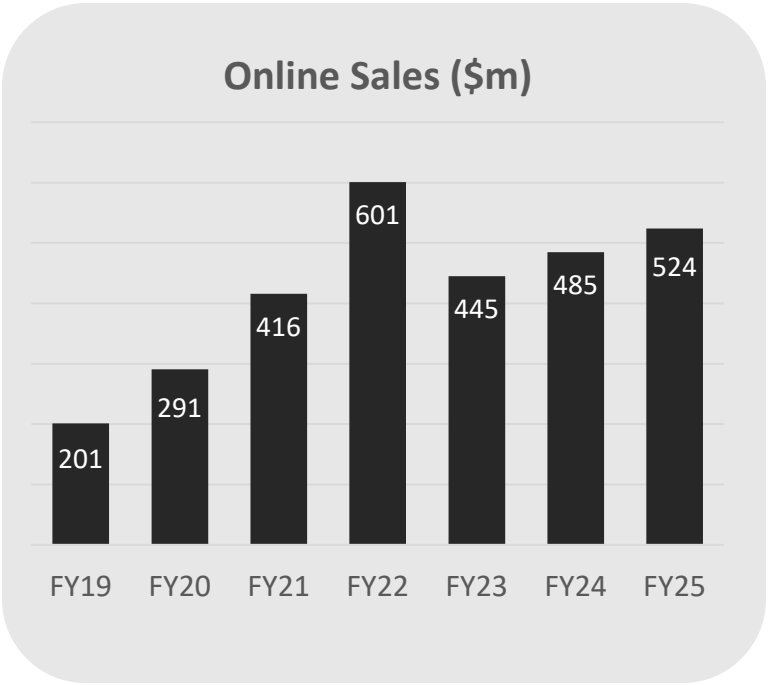
A Appendix



Growing online sales presence with high percentage click & collect

Significant improvement in online customer experience. Contribution margin dollars per transaction are higher online than in store. Clear opportunity with small percentage of members shopping both online and in-store

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	Jun-19	Jun-25		Jun-19	Jun-25
Digital Sales (LTM)	\$201m	\$524m	Online NPS	53.8	70.7
Digital sales % of total sales	7%	13%	% of club members who are omni shoppers ²	6%	11%

93% of all sales completed in-store

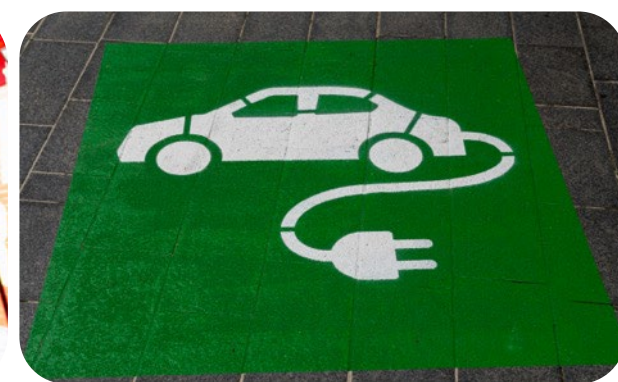
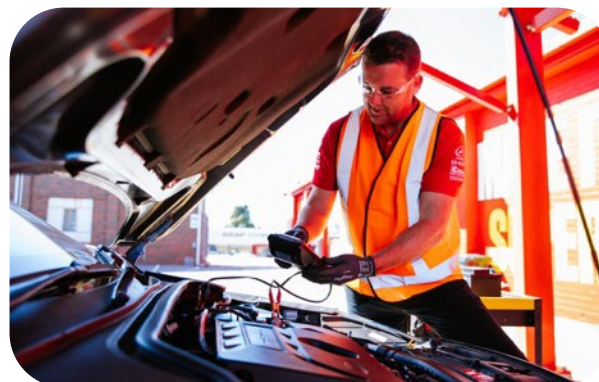
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SUPERCHEAP **AUTO**

Appendix



Solid market fundamentals underpinning long-term growth



Changing car parc

- The ANZ car parc continues to grow and age, with longer ownership driving higher servicing and parts demand
- More vehicles moving beyond OEM warranty are shifting demand to the independent aftermarket
- Increasing car parc fragmentation and rise in Chinese and Korean brands

Car ownership

- The car parc is projected to reach ~24M by 2035 (+1.8% CAGR)
- Ongoing maintenance and replacement parts are needs based, supporting resilient demand
- Complemented by discretionary spend in vehicle accessories particularly in newer cars and 4WD

Value-led maintenance

- Cost-of-living and rising vehicle prices are reinforcing a shift toward value-led repair, maintenance and DIY
- Consumers prioritising value, convenience and trusted advice over dealerships

Electrification

- Despite a recent surge in uptake fueled by the Middle East conflict, EV adoption is expected to reach 15-20% of the car parc by 2040
- ICE and PHEV vehicles will remain dominant, sustaining the core maintenance and parts demand

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A compelling customer value proposition



Famous for range

- Home of the brands customers want to buy
- Quality private label with value for money across good and better price points, with limited opening price point offerings

Trusted advice

- A trusted team delivering best in class service and product knowledge
- Product displays that engage and educate the customer with a frictionless purchase journey
- Fitment destination for core categories, expanding into new categories (e.g. auto electrical)

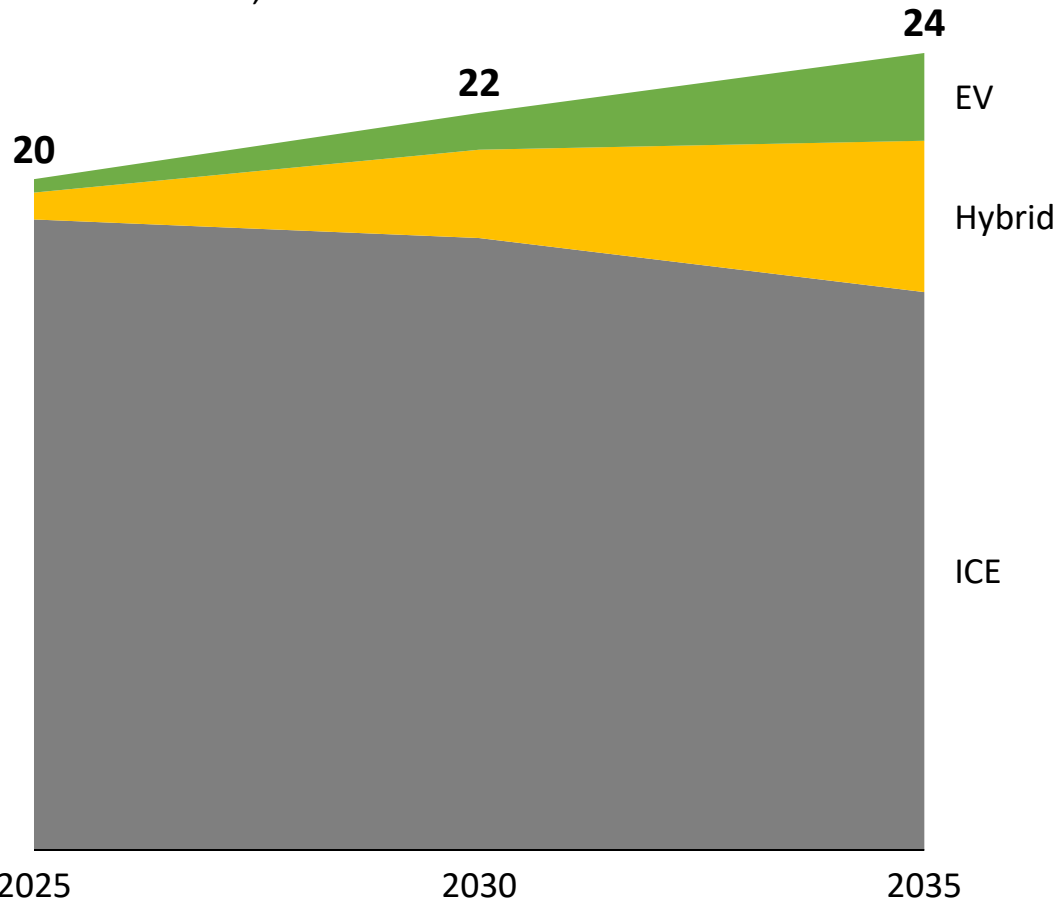
Great value, every day

- Mix of everyday low prices and HI/LO to provide everyday value and exciting promotions to drive traffic
- Quality private label products, offering excellent value everyday
- Always a market leading price/offer on key products to support key shopping missions
- Price and value as a central message in customer communication

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Evolving with a changing car parc

Australian car parc, share by powertrain
million cars, 2025-35¹



- The Australian car parc is projected to grow from ~20 million vehicles today to ~24 million by 2035 (+1.8% CAGR), driven primarily by population growth
- While EV penetration will increase, ICE and Hybrid vehicles will remain dominant through to 2035
- Hybrid vehicles have comparable maintenance needs to ICE, sustaining demand across DIY service and maintenance categories
- EV adoption creates incremental growth opportunities in emerging categories (e.g. charging cables, EV-specific parts and accessories)

Supercheap Auto is well positioned to sustain core growth while capturing upside from the EV transition

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rebel

Appendix



Strong market fundamentals underpinning long-term growth

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Health and wellbeing

- Structural shift toward health, fitness and active lifestyles driving growth of the wellness economy
- Australians increasingly prioritise long-term health and wellbeing, embedding movement, recovery, nutrition and mental health into everyday routines



Sports participation

- AusPlay data shows high sustained sports participation across ages and demographics
- Participation broadening beyond youth, with growth across mid-life and older cohorts supporting demand
- New sports gaining momentum e.g. pickleball, padel



A culture of sport

- Sport is a cultural constant, driving engagement and spending
- Australia maintains one of the world's highest rates of sports fandom and engagement, with major domestic and global sporting codes embedded in everyday culture



Major sporting events

- Consistent flow of major sporting events drives increased participation, visibility and grassroots investment before and after the event cycle
- Brisbane 2032 is expected to further amplify participation, national sporting pride and category relevance over the decade

A compelling customer value proposition

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Differentiated on experience

- Trusted advice from knowledgeable team members who help customers make confident choices
- A seamless omni journey, moving easily between store and digital with low friction
- Stores designed to inspire participation and enable comparison and trial

Famous for product

- The broadest range of leading global sports brands in one destination
- Depth across apparel, footwear and equipment — from entry-level to elite performance
- The latest innovation, launches and exclusives as categories evolve
- A trusted curation for quality, performance and relevance across sports categories



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Appendix



Strong market fundamentals supporting long-term growth



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Embedded outdoor lifestyle demand

- Outdoor recreation embedded in Australian lifestyles, supported by climate, coastline and waterway access
- Consistent participation drives recurring spend, supporting more stable demand profile than typical discretionary categories
- Broad relevance across entry-level, family and enthusiast segments, creating diverse customer base

Attractive category growth & spend dynamics

- Large, fragmented market with opportunity to consolidate share through scale, range leadership and brand trust
- Discretionary "affordable escape" spend, more resilient than high ticket travel in softer consumer environments
- Ongoing premiumisation and trade up, driven by shifting trends and product innovation

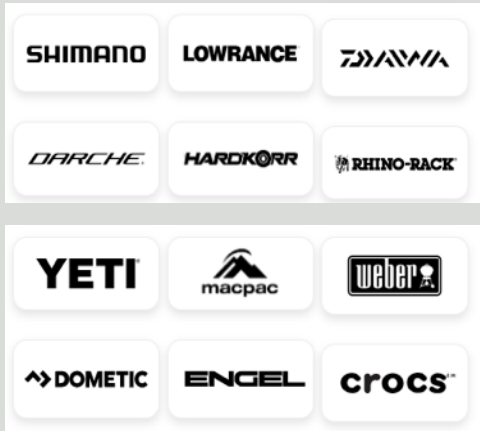
Fishing – resilient demand driver

- Structurally resilient category with fishing a highly accessible, consistently participated leisure activity
- Low-cost entry with high participation frequency, creating repeat spend across consumables, upgrades and accessories
- Multi-generational activity with renewed youth relevance, driven by social platforms

A compelling customer value proposition



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Famous for range and quality brands

- All the relevant products our customers are chasing in store and online
- Largest and best quality range of brands
- Catering for first timers to expert customers

Differentiate on experience

- We understand our customers and guide them to what they need, when they need it
- Building localised BCF'ing Expert Service

Deliver on value

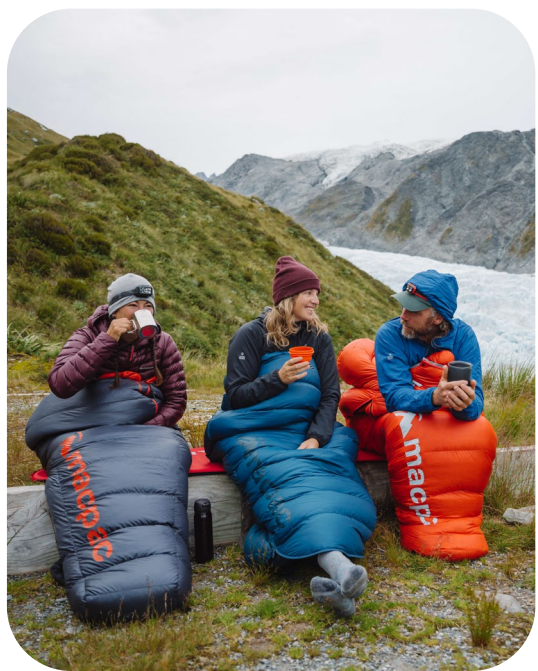
- Value as a non-negotiable
- Disciplined pricing architecture that combines compelling promotional moments with consistently sharp everyday club pricing
- Ensuring customers can trust BCF to offer the right value at the right time

“OBSESSED WITH BEING LOCALLY RELEVANT FOR OUR CUSTOMERS”

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Appendix



Solid market fundamentals underpinning long-term growth



Outdoor participation

- Bushwalking/hiking remains among the top 3 adult activities in Australia, with participation sustained after the post-COVID surge¹
- Engagement is broad-based across age groups, supporting a large and enduring customer base

Sustainability

- Durability, repairability and low-impact materials, are now core category expectations rather than niche features
- Brands embedding sustainability into product design and lifecycle are seeing stronger trust and loyalty

Macroeconomic factors

- Prolonged high fuel and airfare costs will shift leisure toward local, low-cost activities such as hiking and outdoor recreation
- Broader cost of living pressure is sustaining participation in accessible outdoor activities, benefitting durable, versatile and everyday outdoor brands

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A compelling customer value proposition

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Quality outdoor gear

- We offer high quality, technical outdoor apparel and equipment

Made responsibly

- We work tirelessly to do the least harm possible when producing gear
- We use responsibly sourced materials, which use fewer resources and harmful chemicals during production

Trusted to last

- We bring sustainability to life in product lifecycle, with a focus on durable products
- We offer a repairs service to keep your gear out there for longer