TURNING POINT™
BRANDS

INVESTOR PRESENTATION

Q3 2023

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This presentation contains forward-looking statements within the meaning of the federal securities laws. Forward-looking statements may generally be identified by the use of words such as "anticipate," "believe," "expect," "intend," "plan" and "will" or, in each case, their negative, or other variations or comparable terminology. These forward-looking statements include all matters that are not historical facts. By their nature, forward-looking statements involve risks and uncertainties because they relate to events and depend on circumstances that may or may not occur in the future. As a result, actual events may differ materially from those expressed in or suggested by the forward-looking statements. Factors that could cause these differences include, but are not limited to, the factors set forth in “Risk Factors” included in Turning Point Brands, Inc. (the “Company”, “we”, “our”, “us”, or “TPB”) annual report on Form 10-K and other reports filed with the Securities and Exchange Commission from time to time. Any forward-looking statement made by TPB in this presentation has been prepared in good faith and, where applicable, is based on estimates, assumptions and analysis that we believe, as of the date hereof, provide a reasonable basis for the information contained herein. New risks and uncertainties come up from time to time, and it is impossible for TPB to predict these events or how they may affect it. TPB has no obligation, and does not intend, to update any forward-looking statements after the date hereof, except as required by federal securities laws.

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This presentation includes certain non-U.S. generally accepted accounting principles (“GAAP") financial measures, including EBITDA, Adjusted EBITDA and Net Debt. Such non-GAAP financial measures are not in accordance with, or an alternative to, financial measures prepared in accordance with GAAP. Please refer to the Appendix of this presentation for a reconciliation of EBITDA and Adjusted EBITDA to net income and Net Debt to Debt. To supplement our financial information presented in accordance with generally accepted accounting principles in the United States, or GAAP, we use non GAAP financial measures, including EBITDA, Adjusted EBITDA and Net Debt. We believe EBITDA and Adjusted EBITDA provide useful information to management and investors regarding certain financial and business trends relating to financial condition and results of operations. Adjusted EBITDA and Net Debt are used by management to compare performance to that of prior periods for trend analyses and planning purposes and is presented to our board of directors. We believe that EBITDA and Adjusted EBITDA are appropriate measures of operating performance because they eliminate the impact of expenses that do not relate to business performance.

Non GAAP measures should not be considered a substitute for, or superior to, financial measures calculated in accordance with GAAP. EBITDA and Adjusted EBITDA exclude significant expenses that are required by GAAP to be recorded in our financial statements and is subject to inherent limitations. In addition, other companies in our industry may calculate these non GAAP measure differently than we do or may not calculate it at all, limiting its usefulness as a comparative measure.

TURNING POINT™ BRANDS

Company Overview

TPB: A Unique Consumer Products Growth Company

ZIG-ZAG®

#1 Premium and Overall Rolling Paper Brand in the U.S. and Canada and #1 in MYO Cigar Wraps[1]

Segment Comprises Majority of Profit Pool and Benefits from Secular Growth Trends in Cannabinoid Consumption

Stoker's

#1 Loose Leaf Chew and Leading MST Value Brand[1]

13%

3-Yr EBITDA[2] CAGR

CLIPPER®

Significant Opportunity to Expand Distribution of #1 Reusable Lighter in the World

CapEx = ~1% Sales
average 2017-2022

Asset-light Business Model and Recession Resistant Products Drive Stable Cash Flow

1. Per MSAi as of FY2022.
2. For period ending FY2022. See "Non-GAAP Reconciliation" in Disclaimer.

TPB is a Consumer Products company that markets strong brands

BROAD PORTFOLIO OF ICONIC AND EMERGING BRANDS

ZIG-ZAG®

Stoker's®

FRE™

CLIPPER®

CHOICE LEAF

OLD PAL

The Original! Blunt Wrap®

BEECH-NUT EST 1897

APPALACHIA

TROPHY

DURANGO

HAVANA BLOSSOM

BIG MOUNTAIN

TURNING POINT™ BRANDS

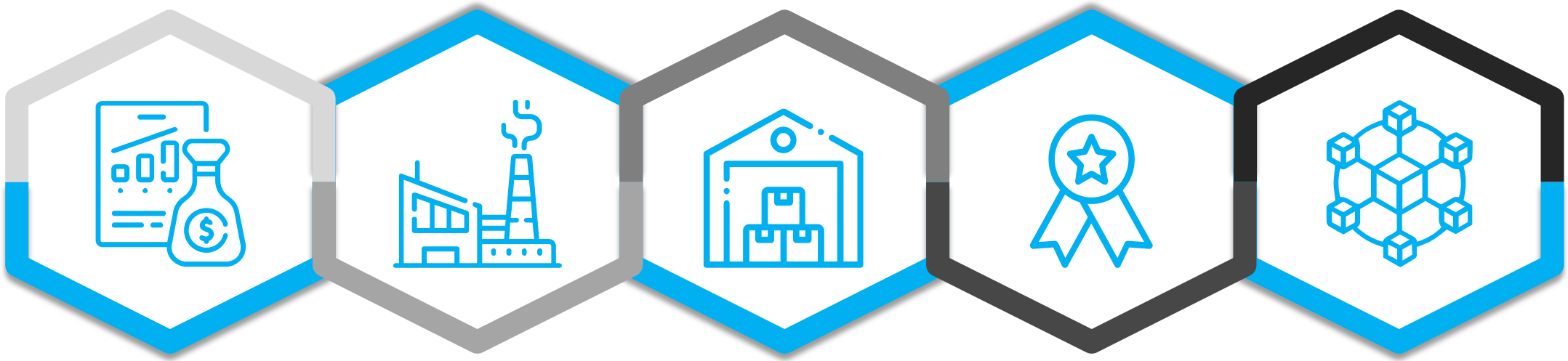
TPB Business Segments

	Zig-Zag Products	Stoker's Products
	Rolling papers and Make-Your-Own ("MYO") cigar wraps	*Loose leaf chewing tobacco and moist snuff tobacco*
LTM Sales[1]	**$182mm**	**$139mm**
Key Brands	ZIG-ZAG CLIPPER	Stoker's, Appalachia, Beech-Nut, Trophy, Havana Blossom, Big Mountain, Durango, FRE
Strategic Priorities	• Continue strong growth trajectory in the near term • Capture growth in cannabinoid consumption • Drive recently launched product offerings and expand penetration in e-commerce and alternative channels (head shops, dispensaries) • CLIPPER distribution expansion	• Capitalize on strong growth in Moist Snuff Tobacco and stability of tobacco chew • Stoker's: the leading value brand in tobacco chew with a long runway for growth in MST ▪ "Great dip at a fair price" • Growth predominantly driven by same store sales with opportunity for further expansion and distribution gains • Nicotine pouch entry (FRE)

1. LTM Period Ended 9/30/23

* Excludes vapor distribution business which was contributed in Q4 2022 to Creative Distribution Services, a new wholly-owned unrestricted subsidiary of TPB.

Efficient Manufacturing, Supply & Distribution Model



ASSET LIGHT APPROACH

Asset-Light approach allows TPB to maintain low overhead costs, maximize operational flexibility, and invest minimal CapEx

THIRD-PARTY SOURCING

A majority of net sales are from products manufactured by third-party manufacturers

NATIONAL DISTRIBUTION

National distribution coupled with national account sales team focused on chains and regional sales teams focused on independents maximizes breadth of reach

BEST-IN-CLASS SUPPLY CHAIN

Sourcing teams in Asia and across North American farm networks source highest quality products

B2C AND B2B CAPABILITIES

Online B2C distribution platforms reach millions of customers, B2B e-commerce platform caters to alternative stores with capabilities to deliver regulated products

TPB Strategic Priorities







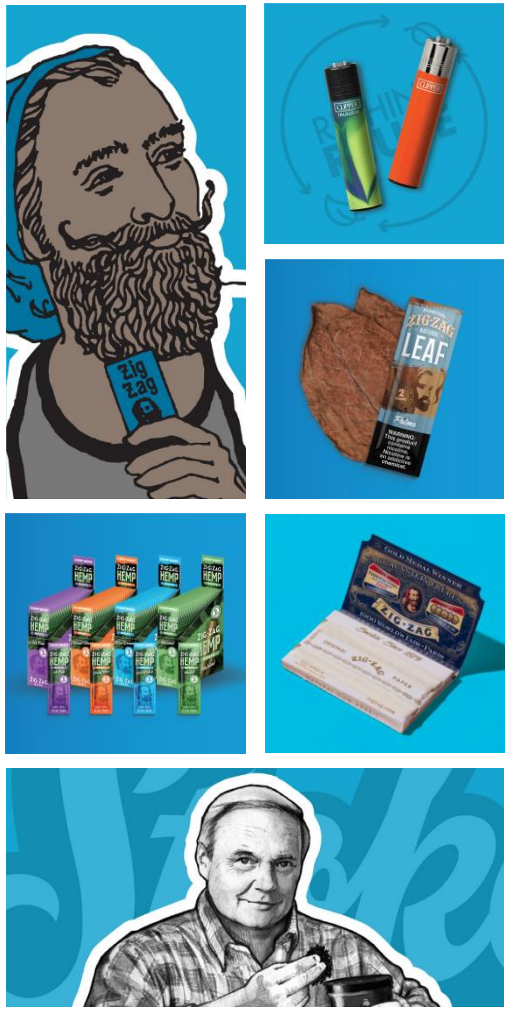






- Grow Share of Existing Product Lines, Domestically and Internationally
- Increase Zig-Zag's Presence in the Alternative Channel
- Expand into Adjacent Categories through Innovation and New Partnerships
- Accelerate Growth via National Distribution Network
- Maintain Lean, Low-Cost Operating Model
- Generate Strong Free Cash Flow

TPB Key Investment Highlights



1	Large, Leading Brands with Significant Scale
2	Exposure to Growing Cannabinoid Consumption Trends
3	Successful Track Record of New Product Launches and Category Expansions
4	E-Commerce Capabilities
5	Extensive Distribution Network and Data Driven Sales Organization
6	Asset-light Business Model that Generates Resilient Free Cash Flow
7	Expertise to Succeed in Dynamic Regulatory Environments
8	Experienced Management Team

Zig Zag Products: Iconic Brand with Leading Market Share

About Zig-Zag

Embedded into pop culture with a storied history that dates over 120 years

Papers

#1 premium and overall rolling paper brand sold in the U.S.[1] and Canada[2]

Wraps

Market leader in MYO cigar wraps with a majority share of the market[1]

New Product Launches

Continued roll-out of paper cones, unbleached and hemp rolling papers along with new product introductions

#1 Brand

Zig Zag owns ~35%[1] of the rolling paper market in the US and a majority of the cigar wraps market







1. Per MSAi as of FY2022.
2. Management estimates.

Zig Zag Products: Expanding Portfolio and Sales Channels

Classic Zig-Zag Products



Iconic Products with Strong Brand Recognition

"Zig-Zag Orange" and "Zig-Zag White" are long-standing industry staples

Growth Initiatives



New products (paper cones, natural leaf, hemp wraps, cigars, lighters, accessories etc)



Re-vamped e-commerce platform (now double-digit % of US paper sales)

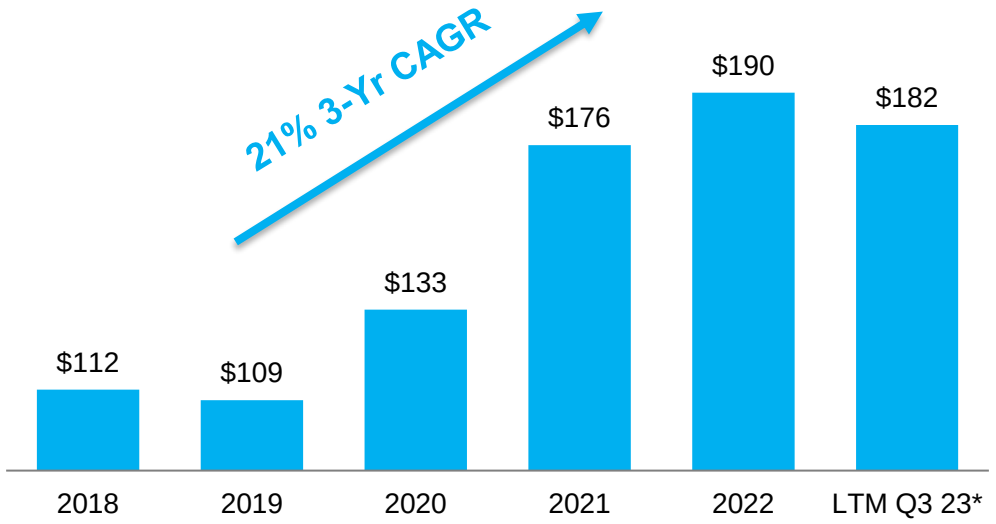


Enhanced brand presence in headshops and dispensaries; Turning Point Brands Canada ramp up

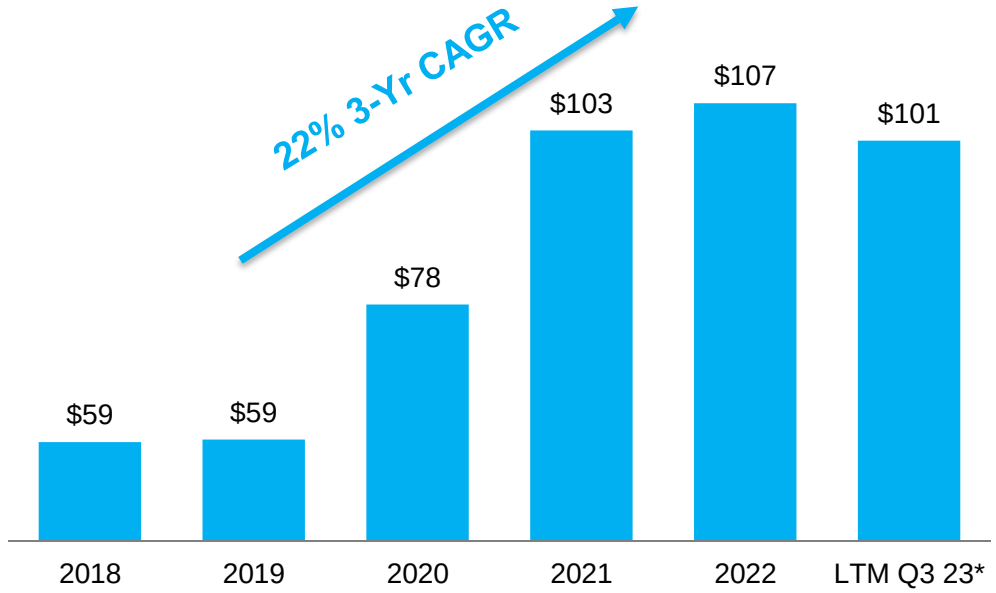
Zig Zag Products: Continued Profit and Margin Growth

Rejuvenated segment with growth initiatives focused on new product introductions and channel expansions aligned with secular market growth trends

Net Sales



Adjusted Gross Profit



Growth initiatives have fundamentally changed the growth profile of the segment over the last three years

Figures are $ in millions.

- LTM decline due to anticipated Q1 2023 trade inventory reduction and timing of sales in Q3 2022

CLIPPER Distribution Agreement

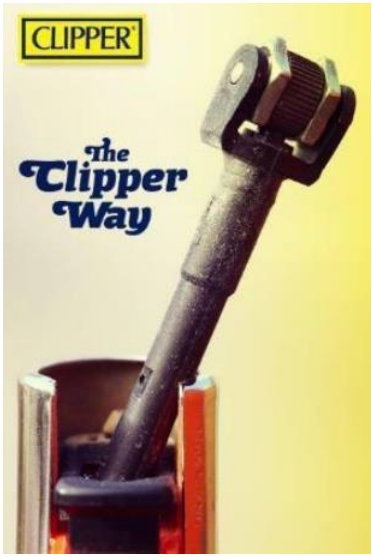
CLIPPER and Zig-Zag are iconic, lifestyle brands with gold standard products and a long, respected history

- Entered into agreement with Flamagas for exclusive distribution of CLIPPER® lighters in the U.S. and Canada which started in 2H 2022
- CLIPPER is the #1 reusable lighter and #2 overall lighter in the world with a legacy that dates back to 1971 and a loyal global consumer base
- With its unique cylindrical shape with a flint and trendy collections, it has become the preferred lighter in the “roll-your-own” cannabis market
- Allows TPB to enter a large market benefitting from increased cannabis consumption that leverages its existing distribution infrastructure
- Cross-selling synergies with Zig-Zag’s strong leading position in convenience stores and CLIPPER’s leading position in headshops and dispensaries





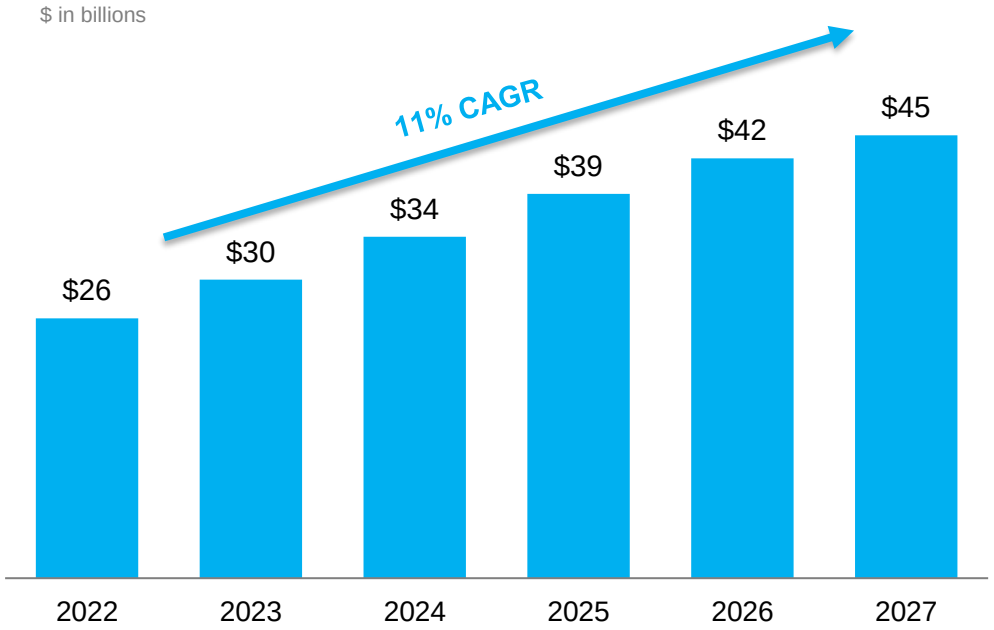




Poised to Benefit from Cannabinoid Consumption Growth

Large potential Total Addressable Market with significant opportunity for TPB expansion

US Legal Cannabis Market[1]



New Products



Evolving market segment with potential for significant scale; Zig-Zag's recently launched products have a long runway for growth as they gain market share

Hemp Wraps



High growth potential for new products in hemp space due to brand strength and loyalty, and growing demand for natural and organic materials

Cigars / MYO Wraps



Strong brand recognition as the market leader in MYO wraps will be leveraged in re-entry of the cigar market

Strategic Investments



Minority investments such as Old Pal serve as potential catalysts for growth

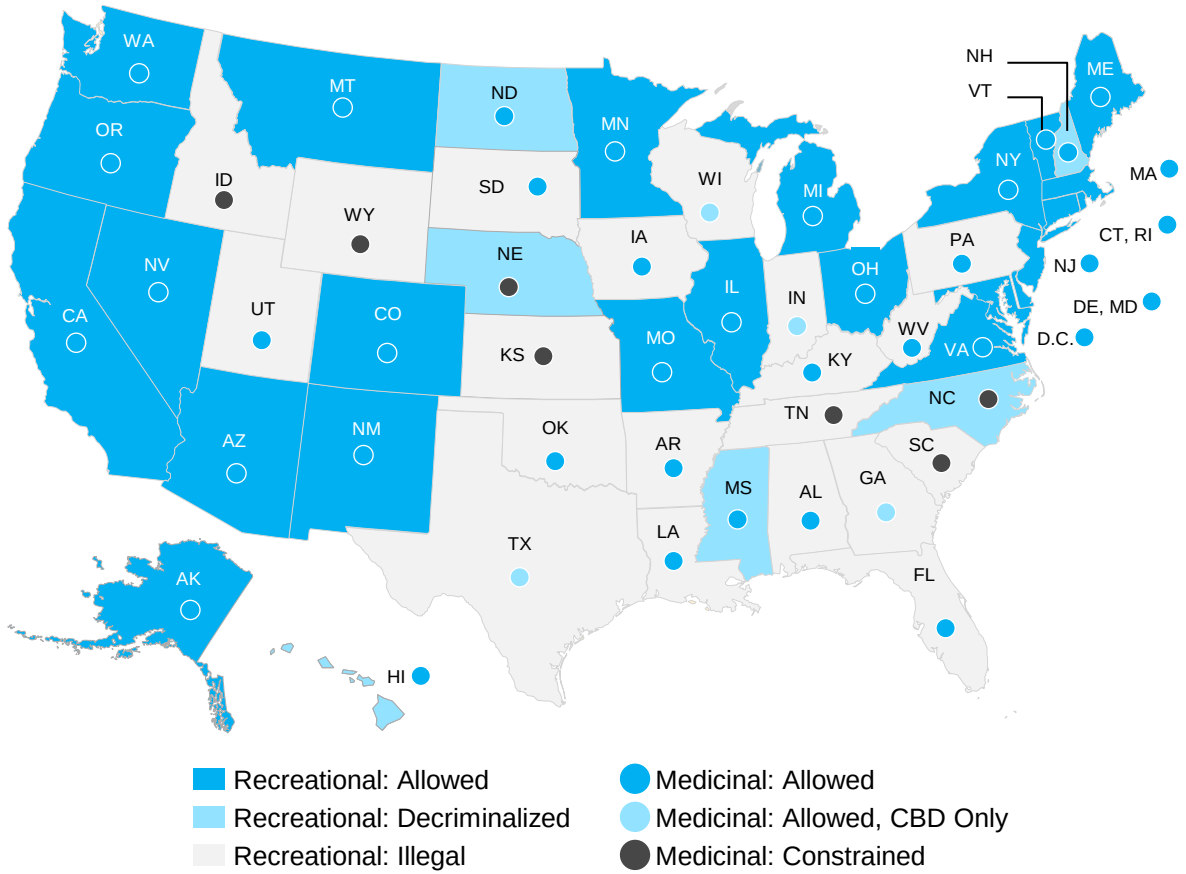
1. BDSA March 2023.

Positioned to Capture Growing Cannabinoid Consumption

24 U.S. states and DC have legalized adult-use and 39 states and DC allow for medical cannabis

68%

of Americans now favor cannabis legalization, double what it was 20 years ago[1]



1H 2021: VA, NM, NY, and CT passed measures to legalize adult use of cannabis

July 2021: Federal legislation to legalize, tax, and regulate adult use cannabis released by Senate Democrats

November 2021: Republican-backed decriminalization bill, the States Reform Act, introduced

Feb 2022: U.S. House passed cannabis banking reform (SAFE Banking Act) for 6th time

November 2022: MD and MO passed adult use

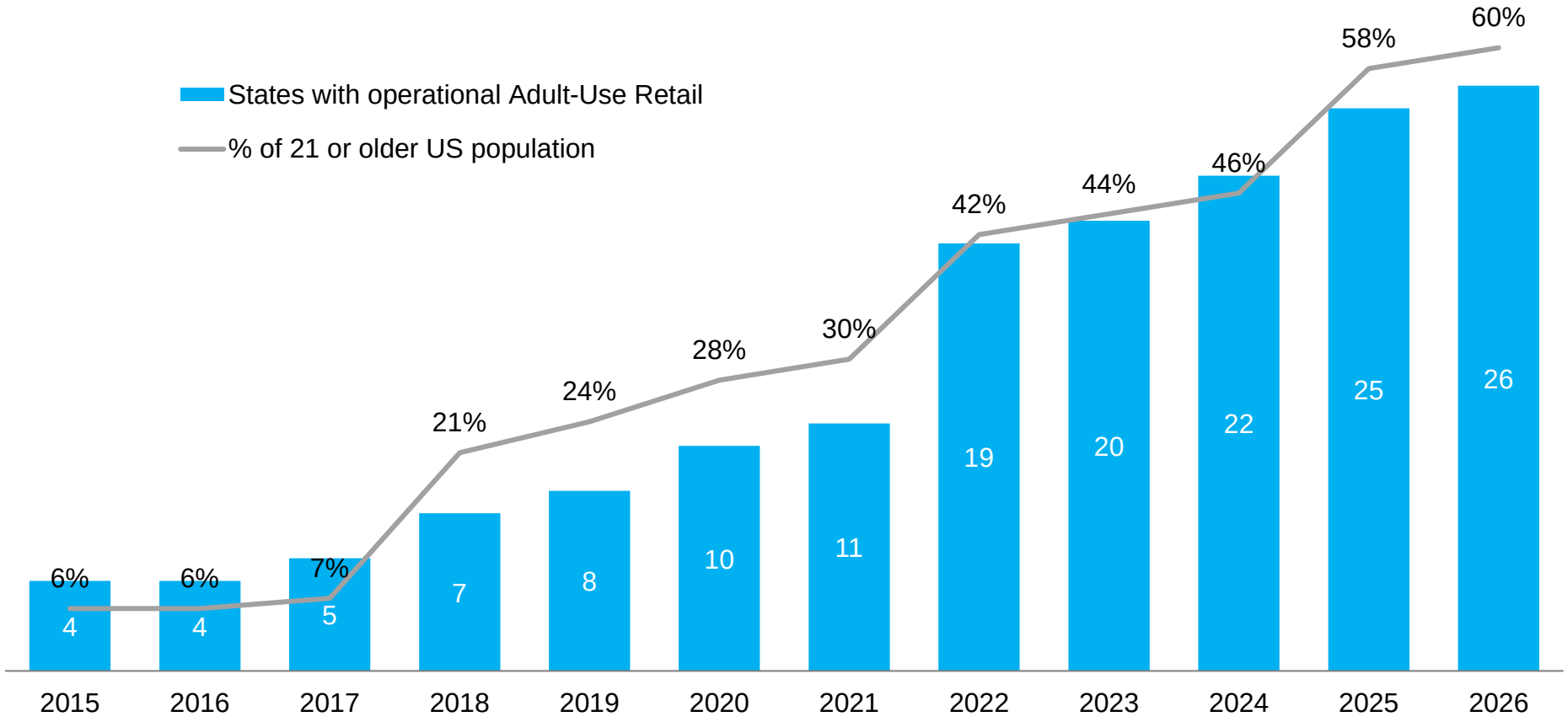
1H 2023: KY passed medicinal use, DE and MN passed adult use

November 2023: OH passed adult use

1. Gallup October 2022 Poll.

Legalization Trends

% of U.S. adult population living in recreational use states projected to double from 30% to 60% from 2021-2026



The industry is benefitting from decriminalization and legalization trends across the United States

Source: BDSA October 2023 and includes states that are expected to have open markets in the future

Stoker's Products: Iconic Brand with Sustained Growth

About Stoker's

Building brand equity for over 80 years. Stoker's is the #1 loose-leaf chew brand[1] and a leading MST value brand

60%

Stoker's created the MST Tubs category and is the category leader with >60%[1] share

MST TUBS

Introduced a larger tub format Moist Snuff Tobacco (MST) product driving category over the last 10+ years



MST Cans

Accelerating strength from distribution gains and same-store sales growth. Significant recent chain launches



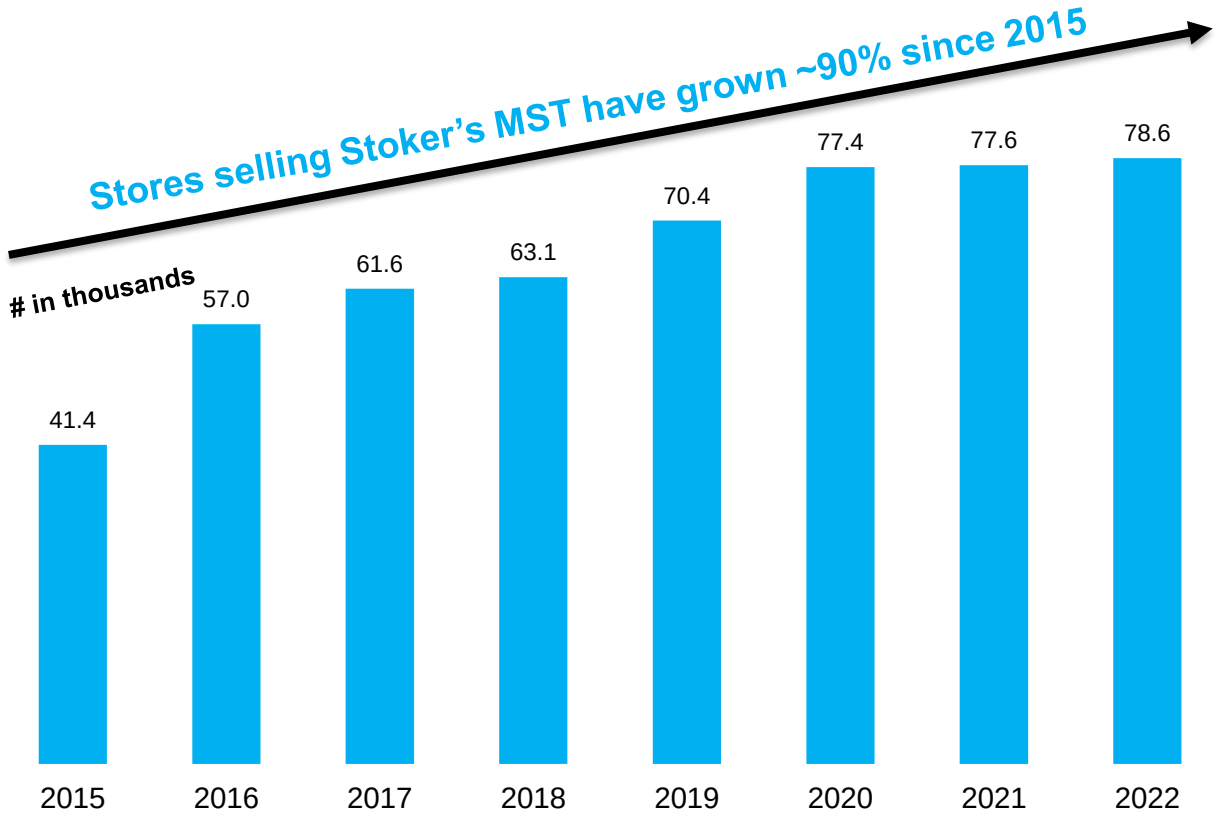
Chew

#1 discount and overall loose-leaf chew brand in the US[1]. TPB's brands collectively hold ~34%[1] of the loose-leaf chew market



1. Per MSAi as of FY2022.

Stoker's Products: Continued MST Distribution Gains



Store count excludes ~14k lower sales velocity Dollar General stores added in 2018.

Long Runway for Growth

Currently in stores representing ~67%[1] of volume weighted distribution

Additional ~30-50k stores targeted for national distribution



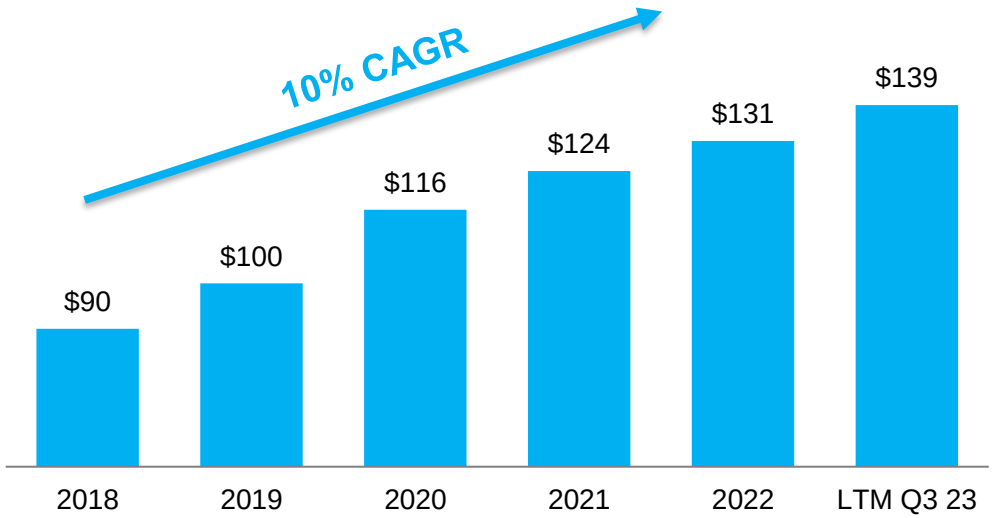


1. Per MSAi as of 3Q23.

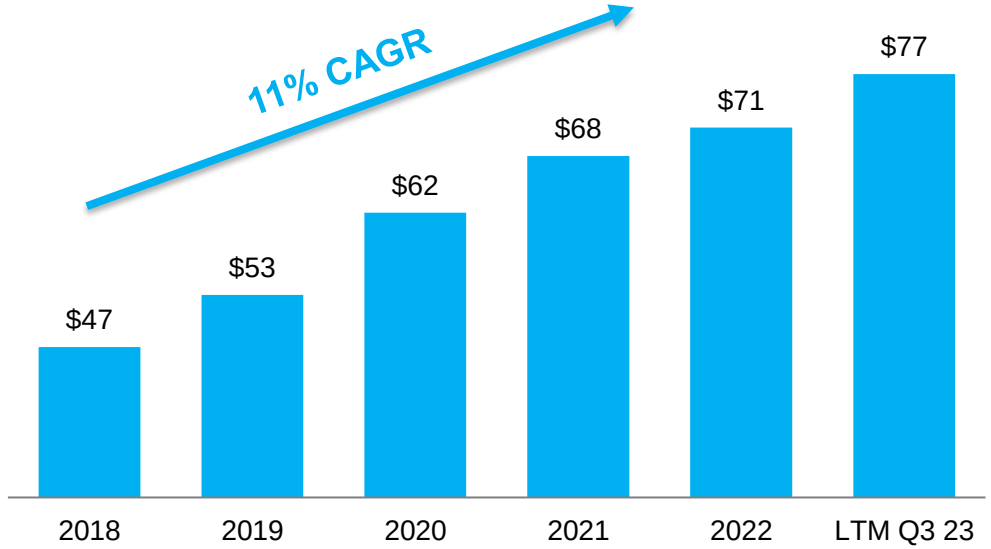
Stoker's Products: Continued Profit and Margin Growth

Smokeless Net Sales and Gross Profit have shown steady growth

Net Sales



Adjusted Gross Profit



Continued growth and operating leverage driven by MST volume and pricing gains

Figures are $ in millions.

New Product Pipeline

Expanding the product portfolio with an exciting lineup of new products and line extensions















Zig-Zag Natural Leaf Cigars

Launched Zig-Zag natural leaf tobacco collection with premium natural leaf wraps in Q4 2021 and followed it with the launch of rough-cut cigars in Q1 2022

Zig-Zag Rose Cones

Launched Zig-Zag rose collection with premium rose cones on the Zig-Zag e-commerce site in 2022 and complemented the collection with the launch of rose wraps

Zig-Zag Terpene Hemp Cones

Added to Zig-Zag's hemp collection with the launch of terpene infused hemp cones in 2023 to complement its hemp wrap offering and expand the collection into new regions

Zig-Zag Palm Leaf Cones

Launched Zig-Zag's first palm leaf offering with a collection of flavor encapsulated palm leaf rolls, creating expansion for Zig-Zag's alternative substrate smoking products

Frē Nicotine Pouches

Frē added to its existing high milligram 9mg, 12mg and 15mg nicotine pouch offering with the introduction of lower nicotine content products (3mg and 6mg) in 2022

Other unique modern oral products are under development

Zig-Zag 70mm Cones

Expanded Zig-Zag's cone portfolio into smaller format 70mm cones in 2023 to provide additional product offerings for adapting consumer preferences

Zig-Zag Combo Booklets

Expanded Zig-Zag's paper offering to include French Orange, Organic Hemp and Unbleached combo booklets in Q4 2023 to provide an all-in-one paper and tip product solution for consumers

Powerful Distribution Infrastructure

North American retail presence that reaches over ~215,000 outlets + B2C online sites



National sales team selling to over 85,000 national chain stores

Regional sales team selling to over 95,000 independent convenience stores

Dedicated product sales teams

E-commerce sites selling direct to consumers on product specific platforms and online marketplaces (eg. Amazon and eBay)

zigzag.com
zigzag.ca
frepouch.com

Online B2B platform reaching alternative channel distributors and stores

wholesale.zigzag.com

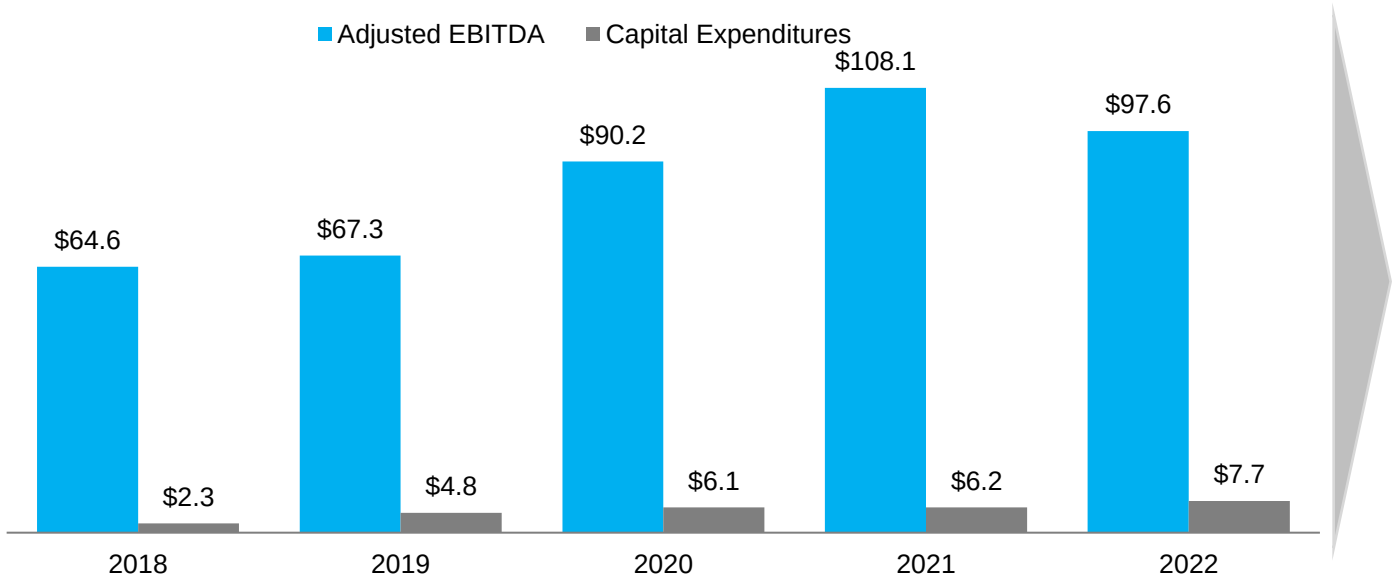
Building a Capital Efficient Business Model

Asset-light business model that generates resilient free cash flow

Initiatives:

- ✓ Outsourced manufacturing of most products supports asset-light model
- ✓ Capital efficiency enables investment in sales force expansion (a proven revenue driver), working capital and infrastructure to support new product launches
- ✓ Re-deploy cash flow from our core businesses for deleveraging, share repurchase/dividends, accretive acquisitions and strategic investments

Adjusted EBITDA vs. Capital Expenditures



Results:

Significant cash flow available to reinvest in the business

Stability of cash flow is enhanced by our recession-resistant, staple products that are small ticket purchases for repeat consumers

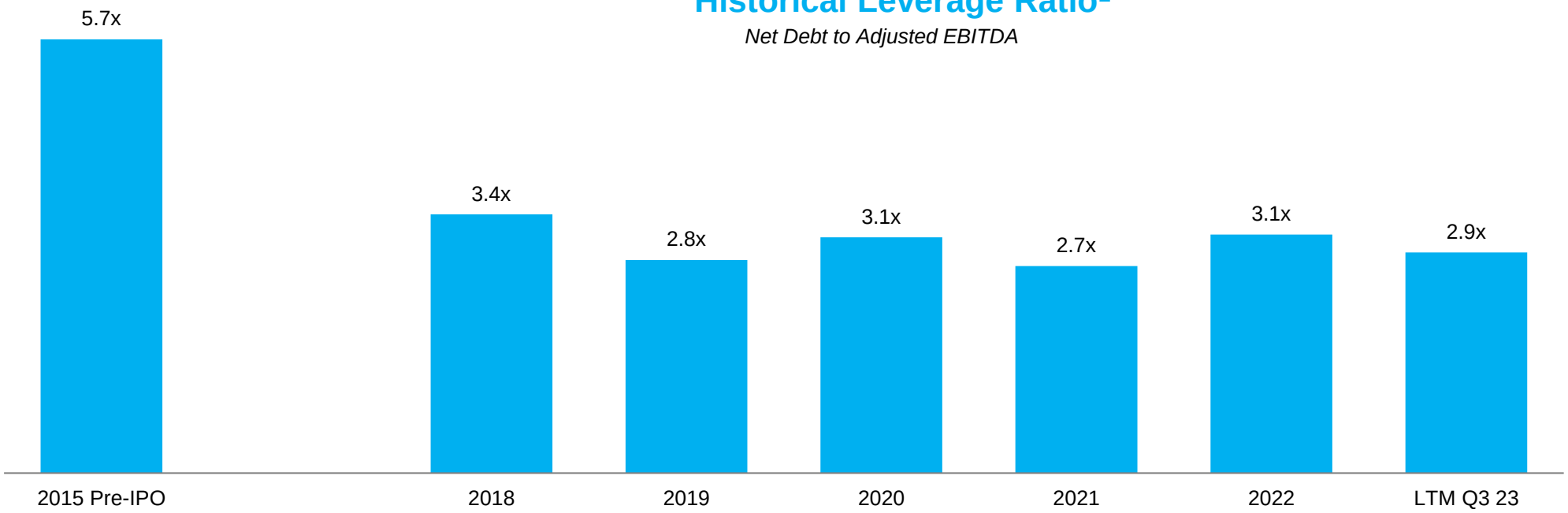
Note: Figures are $ in millions. Adjusted EBITDA Cash Conversion calculated as Adjusted EBITDA less Capex divided by Adjusted EBITDA. See "EBITDA Adjustment Detail" slide.

Conservative and Prudent Financial Policies

Turning Point has taken a prudent approach to liquidity management

Historical Leverage Ratio[1]

Net Debt to Adjusted EBITDA



Dividends Paid	$3.1[2]	$3.5	$3.8	$4.1	$4.3

Note: Dividends Paid are $ in millions.

1. TPB calculates Leverage Ratio by dividing Notes payable and long-term debt, less Cash, by LTM Adjusted EBITDA.
2. The initial quarterly dividend was paid on December 15, 2017 (aggregate amount of $0.8 million) and that payment is included in the 2018 figure for y-o-y comparability purposes.

Track Record of Success Navigating an Evolving Regulatory Backdrop

TPB has extensive experience managing regulatory regime changes and continues to make investments that enhance its regulatory position among competitors

REGULATORY STRATEGY

- TPB does not sell cigarettes, the primary target of the FDA
- Effort to shape premarket pathway for future innovation
- Experienced team of TPB professionals and consultants
- Building consensus among like-minded small and mid-sized businesses to drive policy
- Increased regulation rationalizes market in favor of those who can navigate shifting regulation

TPB has unique capabilities to get proprietary brands through regulatory regime changes

- FDA's PMTA process is a transformational regulatory process
- Submitted applications for 250 products ahead of the PMTA deadline on September 9, 2020 and additional applications including for modern oral products in 2022
- TPB is well-positioned for growth in a post-PMTA environment with its extensive product portfolio

Highly Experienced Senior Leadership Team



GRAHAM A. PURDY

Chief Executive Officer

Joined TPB in **2004**

- Previously held various key roles including COO and the head of TPB's sales organization
- Had 7-year career at Philip Morris, USA prior to joining TPB, where he served in various senior sales and sales management positions



LOUIE REFORMINA

Chief Financial Officer

Joined TPB in **2019**

- Joined TPB after two decades in finance and investment roles including at Point72 Asset Management, Waterfront Capital Partners, Perella Weinberg Partners, Vestar Capital Partners, and Goldman Sachs & Co



BRITTANI N. CUSHMAN

General Counsel & Secretary

Joined TPB in **2014**

- Over a decade of experience related to regulation of consumer products
- President of the Coalition of Manufacturers of Smoking Alternatives and Board member of the U.S. Hemp Roundtable



SUMMER FREIN

Chief Revenue Officer

Joined TPB in **2022**

- Joined TPB after 15+ years of CPG industry experience
- Previously served as the General Manger at Cronos Group implementing the sales, marketing and operational strategy and held a variety of senior leadership roles at Altria Group

TURNING POINT™ BRANDS

Financial Update

Recent Business Performance

Strong outlook in our Zig-Zag and Stoker's businesses

Recent Performance	• Q3 2023 Financial Results: Net Sales of $101.7 million (-5.6%) and Adjusted EBITDA[1] of $24.4 million (flat YoY) • Zig-Zag Products Q3 sales were down 10% yoy due to timing of activities in the previous year but stable sequentially while Stoker's Products (+10%) sales showed strong growth • Repurchased $15.0 million notional of convertible bonds in Q2 2023 ($118.5 million outstanding) • Expected FY 2023 EBITDA of $92 to $95 million (vs. previous expectation of $90 to $95 million) • Closed on a $75 million ABL Facility in November 2023
Key Drivers	• Internal growth initiatives are driving a majority of the growth with core businesses outpacing market growth • Secular trends benefitting rolling paper and wraps market; consumer down-trading benefitting Stoker's • CLIPPER represents significant long-term opportunity and cross-selling synergies with Zig-Zag • $120 million of available liquidity at end of Q3 2023 (pre-ABL) leaves TPB well capitalized to address convertible debt maturity and take advantage of market opportunities

Management is focused on executing on its plan for growth and utilizing strong balance sheet and free cash flow generation towards creating shareholder value

1. See "EBITDA Adjustment Detail" slide.

Expanding Addressable Markets

Extending into large, tangential addressable markets provides runway for growth

End Market	Market Size[1]	Opportunity
Alternative Channel (Headshops and Dispensaries)	~$200mm	Increase share for Zig-Zag papers (currently single-digit/low double-digit %) and other ancillary Zig-Zag products (rolling trays and other smoking accessories, apparel / merchandise, etc)
Lighters	~$500mm	Launch distribution of Clipper lighters (Q3 2022) to expand its presence in the US and Canadian markets; strong customer and consumer overlap with Zig-Zag rolling papers and wraps
White Nicotine Pouch	>$1bn	Introduce Frē including differentiated higher nicotine content offerings into a rapidly growing market
Mass-Market Cigars	>$2.5bn	Re-enter large market that is complementary to Zig-Zag cigar wraps product offering







1. Company estimates of manufacturer revenue opportunity in the U.S. (Lighters market includes Canada).

Appendix

Total Sales and Segment Breakdown

Internal initiatives leading to growth in core segments

	2018	2019	2020	2021	2022	CAGR
Zig-Zag Products						
Wraps	$49	$52	$66	$79	$71	*9%*
US Papers[1]	38	38	52	67	75	*18%*
Canada	14	11	9	25	29	*20%*
Cigars / Other[2]	10	7	5	6	15	*12%*
Total	**$112**	**$109**	**$133**	**$176**	**$190**	***14%***
Stoker's Products						
MST[3]	$42	$54	$68	$78	$88	*20%*
Looseleaf	48	46	48	46	42	*-3%*
Total	**$90**	**$100**	**$116**	**$124**	**$131**	***10%***
CDS	**$131**	**$153**	**$156**	**$145**	**$94**	***-8%***
Total Net Sales	**$333**	**$362**	**$405**	**$445**	**$415**	***6%***

Zig-Zag Products Future Drivers

- Industry levered to cannabinoid consumption
- *Wraps:* New product introductions (ZZ Hemp wraps and natural leaf wraps)
- *US Papers:* New product ramp-up (eg cones), alternative channel penetration (headshops and dispensaries) and e-commerce ramp
- *Canada:* Alternative channel / TPB Canada growth
- *Cigars / Other:* CLIPPER and Cigars re-entry

Stoker's Products Future Drivers

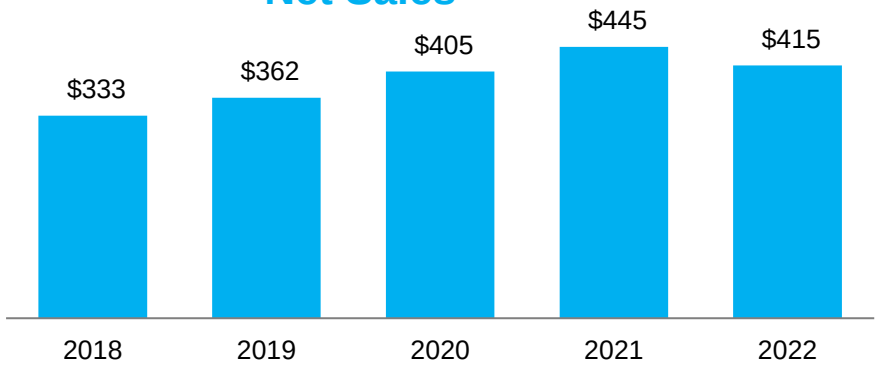
- *MST:* Same-store sales growth and long runway for distribution ramp; FRE introduction
- *Looseleaf:* Vol declines offset by pricing

Note: Figures are $ in millions.

1. Includes Zig-Zag e-commerce sales.
2. Includes CLIPPER lighters (launched Q3 22), cigars, accessories and de-emphasized low-margin products including MYO / pipe products (discontinued in 1Q20).
3. Includes FRE sales in 2022.

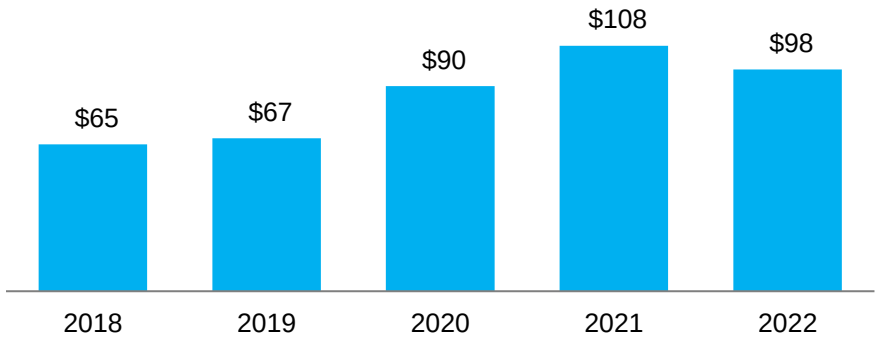
Historical Financials

Net Sales



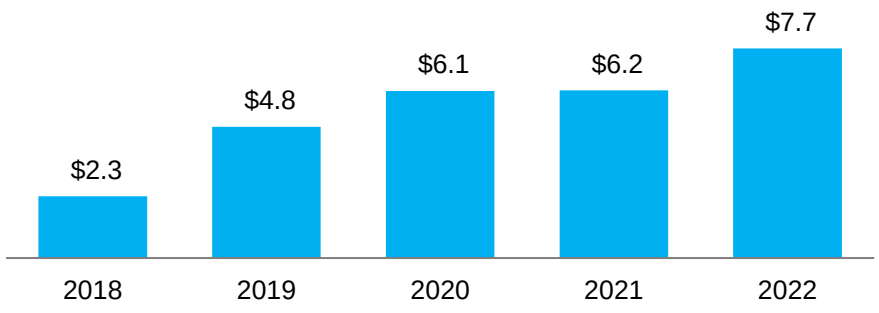
% Growth	16.4%	8.8%	11.9%	10.0%	-6.8%

Adjusted EBITDA[1]



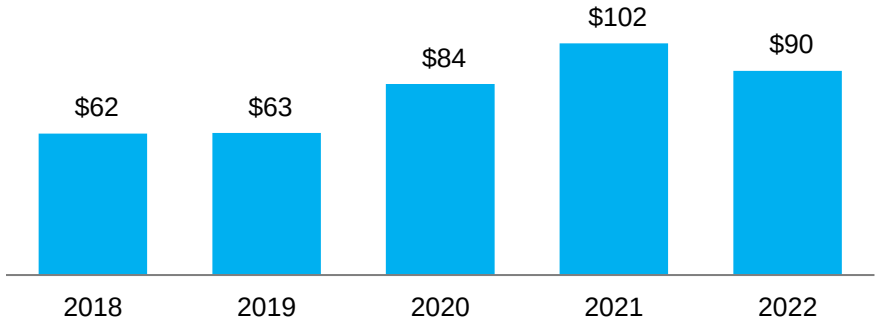
% Margin	19.4%	18.6%	22.3%	24.3%	23.5%

Capital Expenditures



% Margin	0.7%	1.3%	1.5%	1.4%	1.9%

Adjusted EBITDA[1] Less CapEx



% Margin	18.7%	17.3%	20.8%	22.9%	21.7%

Note: Figures are $ in millions.
1. See "EBITDA Adjustment Detail" slide.

EBITDA Adjustment Detail

Reconciliation of GAAP Net Income to Adjusted EBITDA
($ in millions)

	2018	2019	2020	2021	2022	Q3 23
Net income attributable to Turning Point Brands, Inc.	$25.3	$13.8	$38.2	$52.1	$11.6	$10.8
Add:						
Interest expense, net	$14.8	$17.3	$13.5	$20.5	$19.5	$4.0
Loss on extinguishment of debt	2.4	1.3	0.0	(2.2)	(0.9)	(0.5)
Income tax expense	6.3	2.0	12.0	14.0	4.8	3.8
Depreciation expense	2.1	2.6	3.2	3.1	3.4	0.8
Amortization expense	1.0	1.5	1.8	1.9	1.9	0.8
EBITDA	**$51.9**	**$38.6**	**$68.7**	**$89.5**	**$40.4**	**$19.7**
Components of Adjusted EBITDA						
Other (a)	$0.4	$0.4	$1.0	$0.0	$0.0	$0.0
Stock options, restricted stock, and incentives expense (b)	1.4	4.6	2.6	7.6	5.3	1.8
Transactional expenses and strategic initiatives (c)	4.5	1.8	3.1	1.3	0.8	0.1
New product launch costs (d)	1.8	6.2	0.0	0.0	0.0	0.0
FDA PMTA (e)	0.0	2.2	14.4	1.7	4.6	0.3
Corporate and vapor restructuring (f)	4.6	19.2	0.5	1.0	3.4	0.2
Vendor settlement (g)	0.0	(5.5)	0.0	0.0	0.0	0.0
ERP / CRM (h)	0.0	0.0	0.0	0.0	2.0	0.1
Non-cash asset impairment (i)	0.0	0.0	0.0	7.1	41.1	2.2
Adjusted EBITDA	**$64.6**	**$67.3**	**$90.2**	**$108.1**	**$97.6**	**$24.4**

(a) Represents LIFO adjustment, non-cash pension expense (income) and foreign exchange hedging.
(b) Represents non-cash stock options, restricted stock, incentives expense and Solace PRSUs.
(c) Represents the fees incurred for transaction expenses and strategic initiatives.
(d) Represents product launch costs for our new product lines prior to 2020.
(e) Represents costs associated with applications related to FDA PMTA.
(f) Represents costs associated with corporate and vapor restructuring including severance and inventory reserves. 2020 represent the costs from the retirment of a senior executive.
(g) Represents net gain associated with the settlement of a vendor contract.
(h) Represents cost assosicated with scoping new ERP and CRM systems and cost of duplicative ERP licenses.
(i) Represents impairment of goodwill, intangible and investment assets.

Commitment to ESG

MSCI ESG RATINGS A

CCC | B | BB | BBB | A | AA | AAA

We believe that focusing on our consumers and customers, while proactively and productively addressing the environment, our employees, our community, and society at large, is the key to driving value for all stakeholders

Improving Public Health	• Our vision is to provide adult consumers with a broad portfolio of high-quality products with the potential to improve public health
Preventing Youth Usage	• As a seller of products intended for adult-use only, society demands a higher burden of responsibility from us, and we are committed to being proactive in order to prevent under-age appeal of, and access to, our products
Commitment to our Environment	• Being good stewards of the planet will support our business success. Our goal is to reduce our carbon footprint while reducing other waste streams and maximizing recycling
Meaningful Social Impact	• Our goals are to provide an injury-free and diverse workforce in order to provide a winning culture and be the employer of choice
Strong Corporate Governance	• Good corporate governance is critical to our operating principles of winning with accountability, integrity, and responsibility

TURNING POINT™
BRANDS

THANK YOU