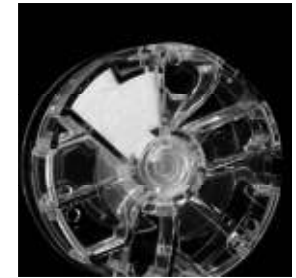




Coated and Security Products

Tony Edwards



Business Description



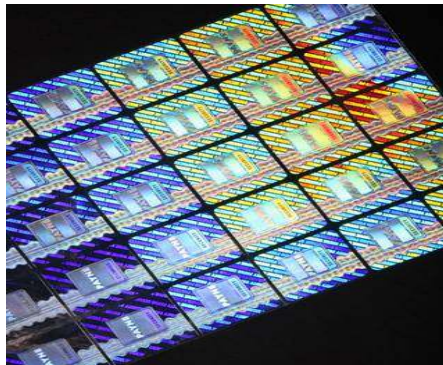
Leading producer and supplier of tear tapes, labels, films, cards, security technologies and systems for applications in consumer product promotion and easy opening, brand protection, document authentication, personal identification and track & trace.



Products and Applications



- Tear tape for easy opening and promotion of consumer products such as cigarettes, confectionery, biscuits, crackers, CD's, DVD's etc.



- Tear tape and labels to enable consumers to readily identify genuine products and thereby deter counterfeit activity.



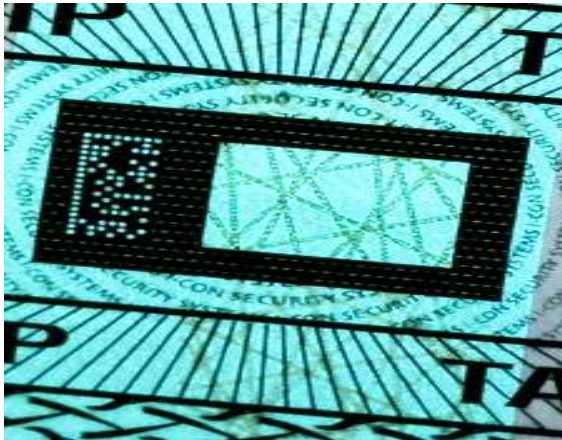
- Security films for the authentication of passports, national ID cards, driving licences, visas and other security documents.



Products and Applications



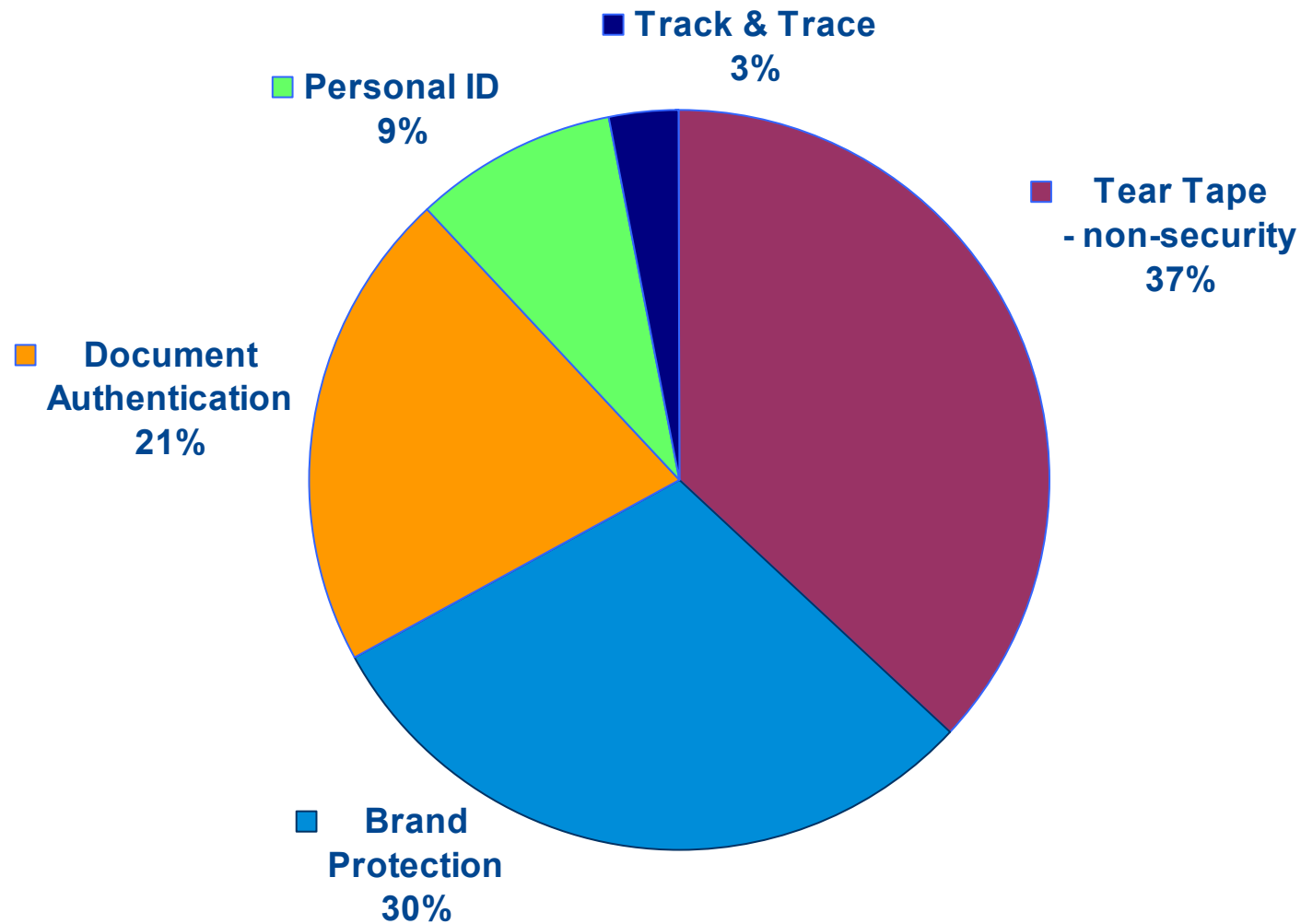
- Printed identity cards and systems for verification of identity and related data and access to events, buildings, houses etc.



- Complete system for the tracking and authentication of products subject to illegal product movements, tax evasion and counterfeit. Applications include tax stamps, high value documents, cigarettes, alcohol, etc.



2006 Sales Analysis



Turning Technology into Reality



Fine Line
Microprint
Holographic Foil
Flip Ink
UV Image

Flip Ink

Microprint

Holographic Foil

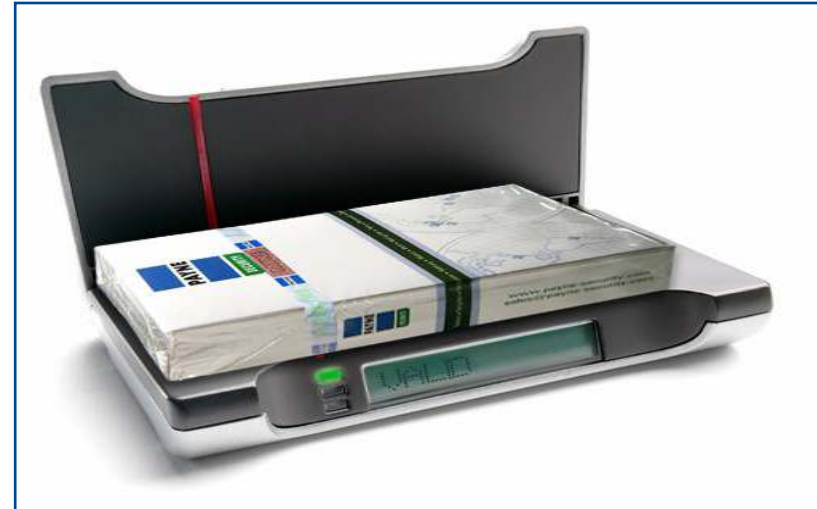
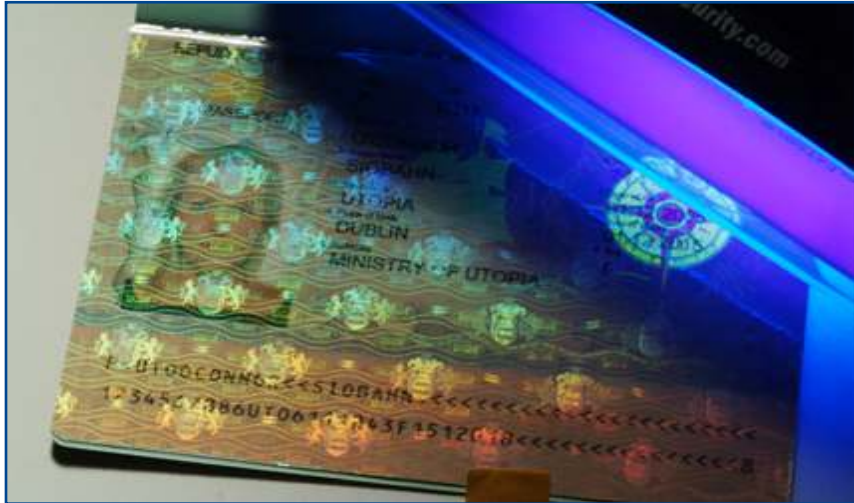
Fine Line

Secure Design

Viewed under normal light

**Enlarged view under UV light
Showing UV Image**

Turning Technology into Reality



Served Markets



- Fast moving consumer goods
- Packaging and board producers
- Security printers and systems integrators
- Government, local authorities, schools, hospitals and other public institutions



Market Position



- The world's leading self-adhesive tear tape company
- A strong position in brand protection based on expertise in printing, inks, taggants and optical technologies
- An emerging position in the document authentication market
- A leading position in the UK personal ID market
- A technology leader in the emerging international track & trace market



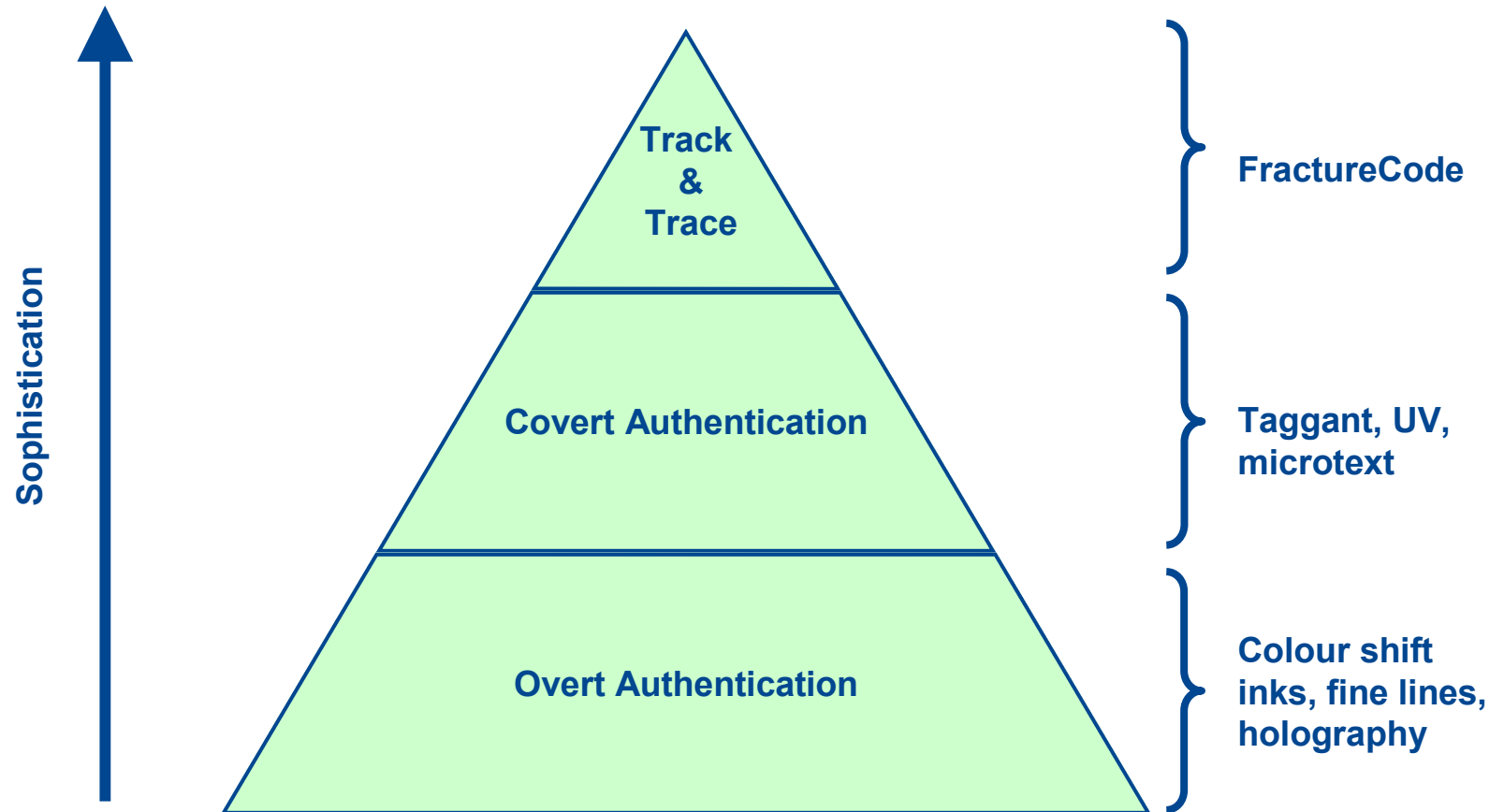
Sources of Competitive Advantage



- Creative and innovative
- Proprietary systems and technologies
- Printing expertise
- Ability to combine systems, technology and materials into increasingly sophisticated solutions for our customers
- Customer base credibility
- Global footprint
- State of the art production capability



Security Products - Technology Pyramid



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Manufacturing Operations



Mold, UK



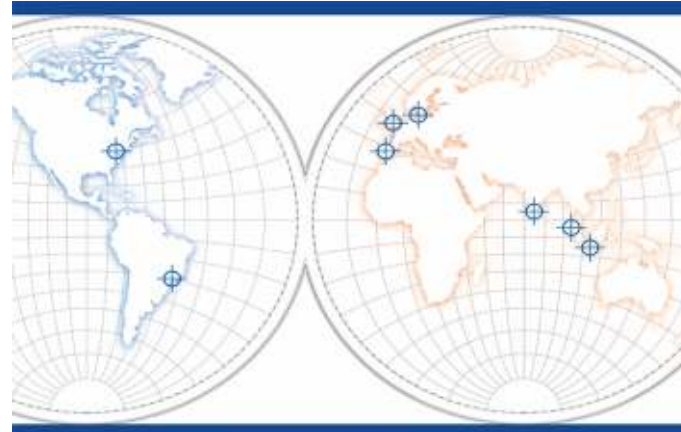
Nottingham, UK



Banbury, UK



Richmond, US



Bangalore, India



Sao Paulo, Brazil



Surabaya, Indonesia



Underlying Growth Drivers



- Tear Tape:
 - Continued search for innovative packaging and promotional solutions by FMCG companies
 - Increasing use as a carrier for product authentication
 - Industry consolidation encouraging use of global partners
- Security/Track & Trace:
 - Increasing counterfeit and contraband in FMCG and other markets
 - Emerging track & trace market
 - Increasing willingness of Governments to enforce/encourage solutions
 - Increasing requirement for authentication of personal identity at borders and within countries/institutions
 - Desire to combine personalisation with authentication in growing smart card market



Forward Strategy



- Sustain global leadership in self-adhesive tear tape market
- Develop proprietary authentication and track & trace systems
- Develop range of carriers
- Develop smart card and information management capability
- Utilise Filtrona footprint and relationships to enable faster growth
- Build market positions organically and through acquisition





Coated and Security Products

