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ESSENTRA

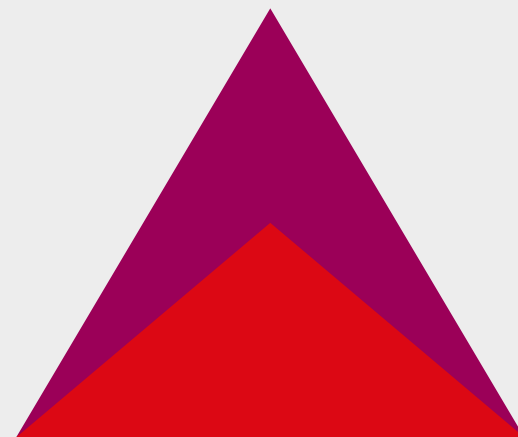


# FILTER PRODUCTS

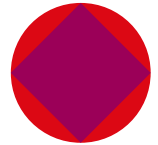
PT Sreekumar – Managing Director

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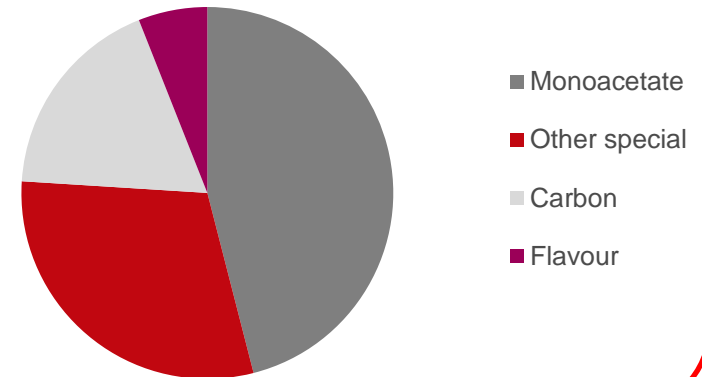
# FILTER PRODUCTS AT A GLANCE



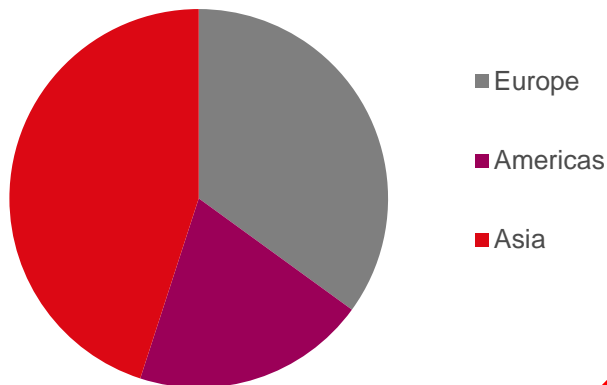
## WHO WE ARE



## WHAT WE DO



## WHERE WE OPERATE



## KEY STATISTICS

- 2014 PF\* revenue = £281m
  - 24% Group total
- Presence in 8 countries
- 9 manufacturing facilities
- 3 regional development centres and 1 UK research facility
- c. 1, 800 employees
- > 700 product specifications
- c. 320 customers

**The only complete solutions provider**

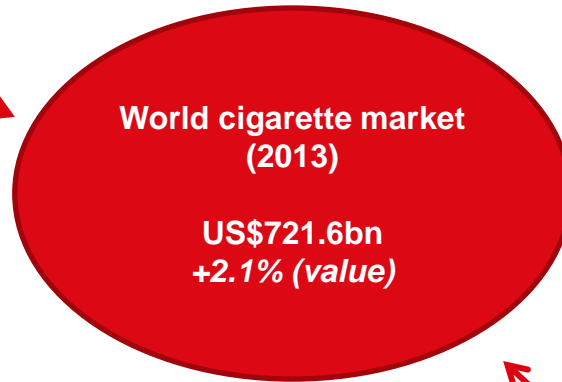
# KEY INDUSTRY DRIVERS



Smoking population



Regulation



Volume & per capita consumption



Pack price & revenue



Illicit trade

# REGIONAL SCALE OF ATTRACTIVENESS AND OPPORTUNITY

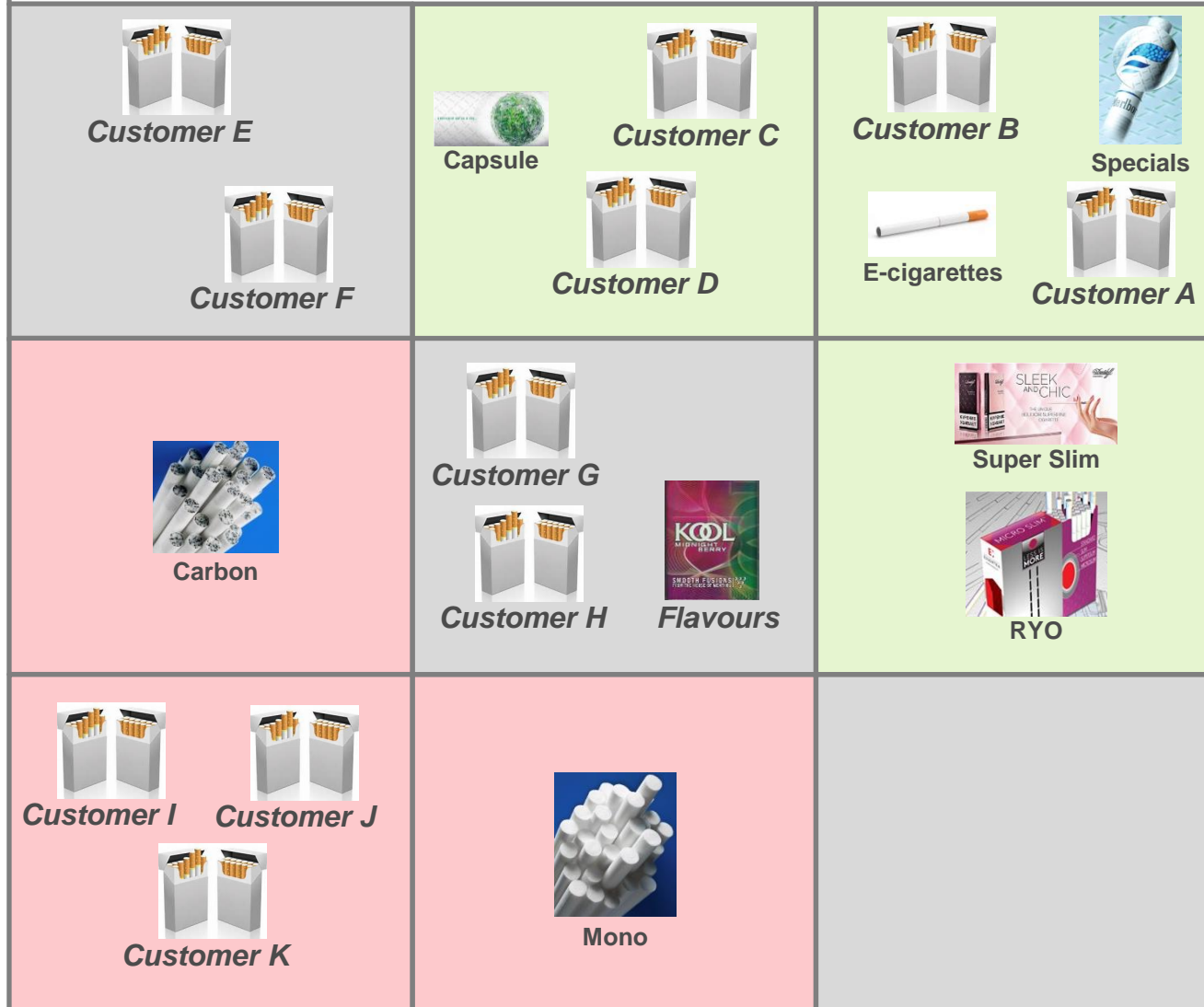


**The only global independent supplier to the tobacco industry**

# PRODUCT AND CUSTOMER SEGMENTATION



Attractiveness ↑



**High attractiveness / high opportunity**

- Large, growth markets with further potential for Essentra growth

Low

→ Opportunity

# ESSENTRA'S MODEL TO SUPPORT THE INDUSTRY



# INNOVATION TO SUPPORT THE INDUSTRY



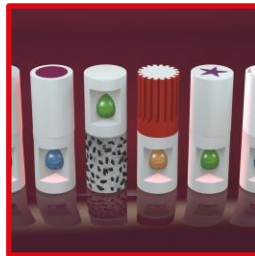
Bringing flavour on demand to the superslim market

**Superslim Sensation**



Expanded testing capabilities, including E-cigarettes

**Scientific Services**



Combine capsule and carbon for additional benefits

**Dual Sensation**



**Dispersible plugwrap**

Plugwrap that disperses 3 times faster than standard PW



Extended range for greater flexibility and visual differentiation

**Tube technology®**



Unbleached paper filter that degrades three times faster than standard filters

**Ochre**



Delivers the greatest channel definition in the market place

**Corinthian**

**Joint development activity +11% in 2013**

# E-CIGARETTES

Total E-cigarette testing capabilities



A range of INNOVATIVE bespoke packaging options

Packaging



Scientific Services

Manufacturing & Packaging Services

NEW

Complete Solutions Provider

Global distribution capabilities



Distribution

Core Products



Full brand protection solutions incl. tamper evidence, child proofing and authentication

Security & Authenticity

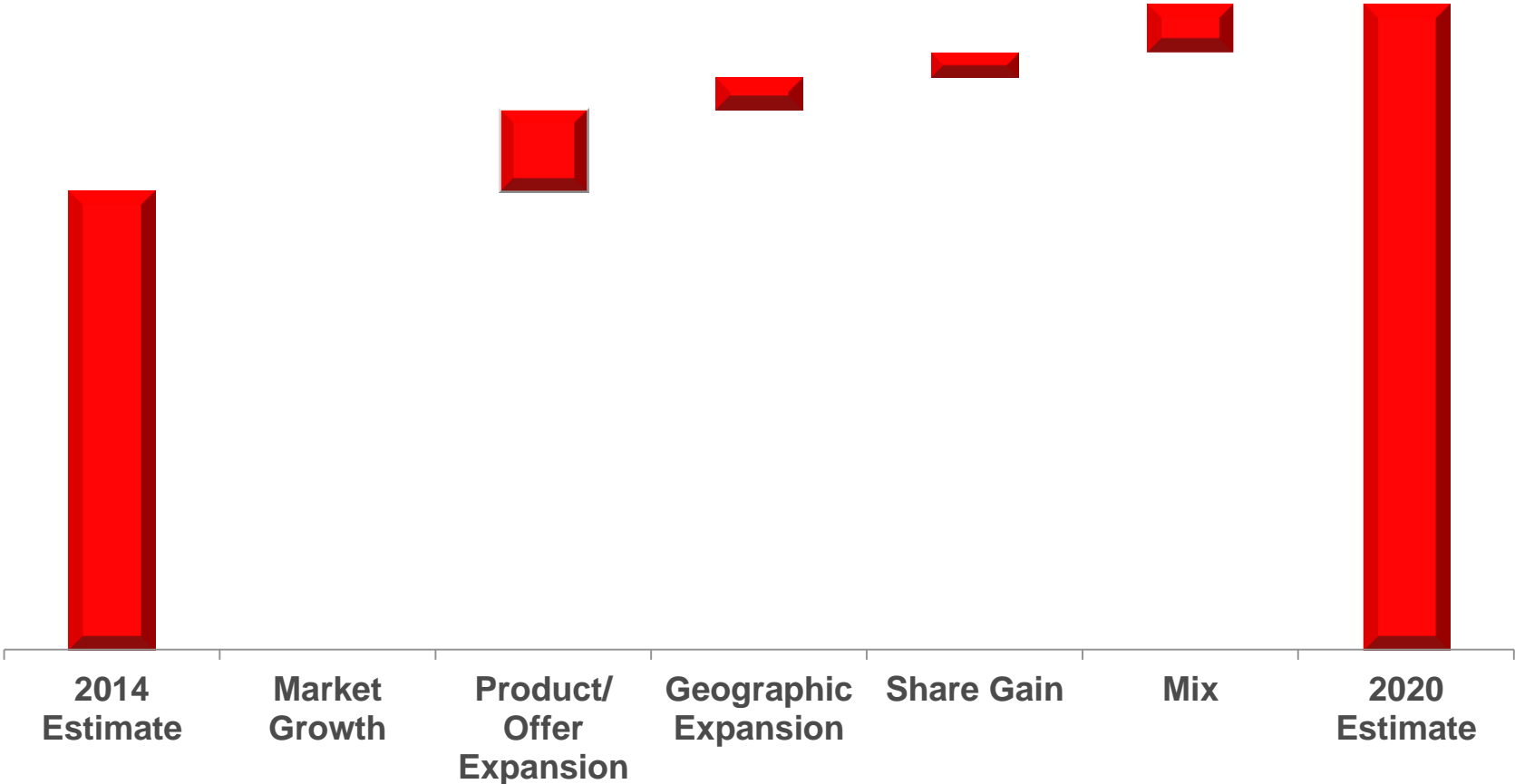


A range of INNOVATIVE product components incl. reservoirs and plastic based components

Double-digit market growth in 2013 to US\$3.5bn



# DRIVE FOR 2020 – THE DIRECTION OF TRAVEL – FILTERS SBU



**At least mid single digit organic growth**

NOTE: Chart for illustrative purposes only, does not represent a financial forecast

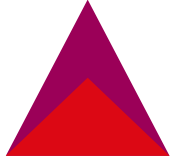
# FILTER PRODUCTS “DRIVE FOR 2020”



**The complete solutions provider**

# Q&A

# APPENDIX



## **PT Sreekumar – Managing Director, Filter Products**

PT Sreekumar joined Essentra in 1995, being initially responsible for the Company's joint venture in India. Before being appointed to his current role in 2005, Sreekumar was Regional Director for Asia Pacific, responsible for the business in Asia and the Middle East. Prior to joining Essentra, Sreekumar worked for the Indian tobacco company Godfrey Philips.



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**ESSENTRA**



# FILTER PRODUCTS

PT Sreekumar – Managing Director

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