



# UPM RAFLATAC BUILDING ON STRENGTH

Antti Jääskeläinen  
EVP, UPM Raflatac



UPM Raflatac

# Self-adhesive labels in end-use



## Leading position in a growing market

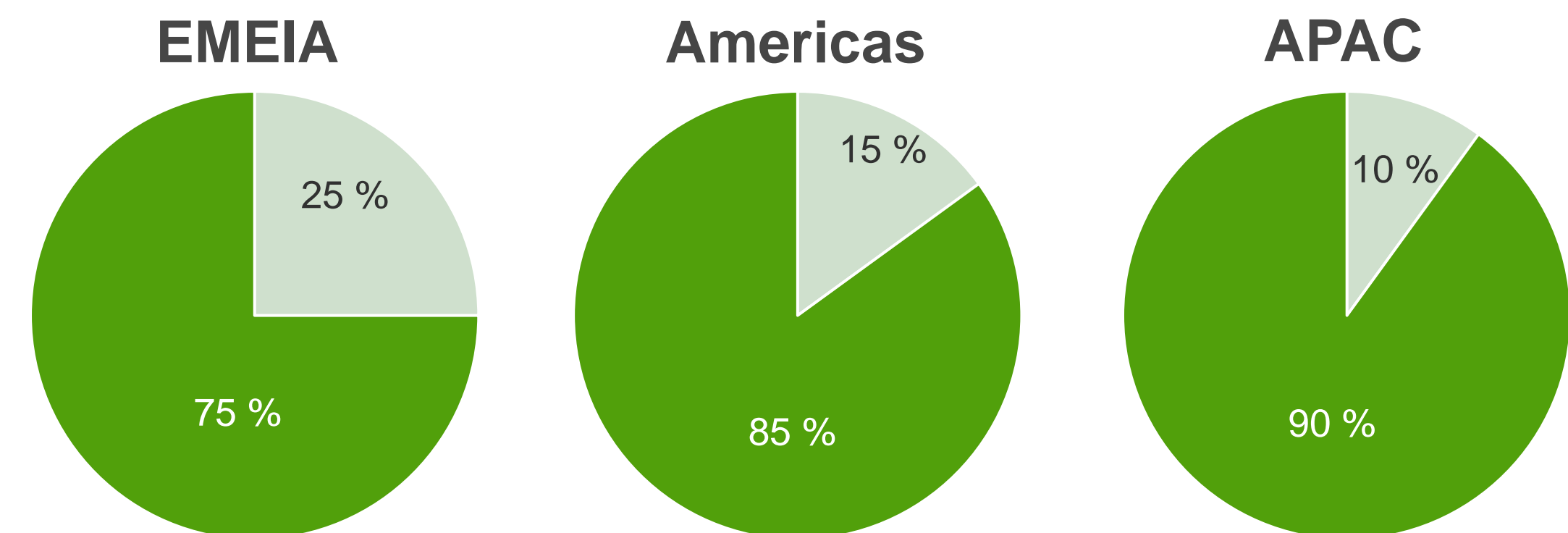
### The self adhesive labelstock market

- > EUR 8bn global market
- ~ 4% p.a. growth
- Private consumption driven

### UPM Raflatac

- #2 globally
- Business in 120 countries
- > 8,000 customers
- 3,000 people in six continents

### UPM Raflatac market shares





# Versatile growth drivers in both developed and developing markets

## Brands & product innovations

- Constant drive to attract consumers

## Legislation

- Increased mandatory information

## Technology

- Self adhesive gaining share, E-commerce

## Population growth

- Total consumption growth

## Higher standard of living

- Expanding middle class

## Urbanisation

- Rapid development of retail, packaged foods & goods growth





## Case: E-commerce driving growth in label use

- Continuing fast growth of E-commerce
- Features
  - Single packages, multiple packaging layers
  - Delivery returns
  - Information labelling crucial part of logistics reliability
- Self adhesive labelling ideal solution due to versatility and reliability



UPM's competitive asset platform enables an efficient response to this growth trend



## Continuing growth

1. Capturing the market growth in the current markets and product areas
2. Increased distribution coverage and customer reach
3. Wider product portfolio
4. M&A when opportunities emerge

Enabled by scalable operating platform  
& efficient investments

Tailored marketing  
Productivity Population growth  
Single households Consumerism  
Reliability Packaged food Ease of use  
Private consumption  
**Label demand**  
Urbanisation E-commerce  
Sustainability Differentiation  
Retailing changes Regulation  
Higher standard of living Shelf-appeal  
Product safety

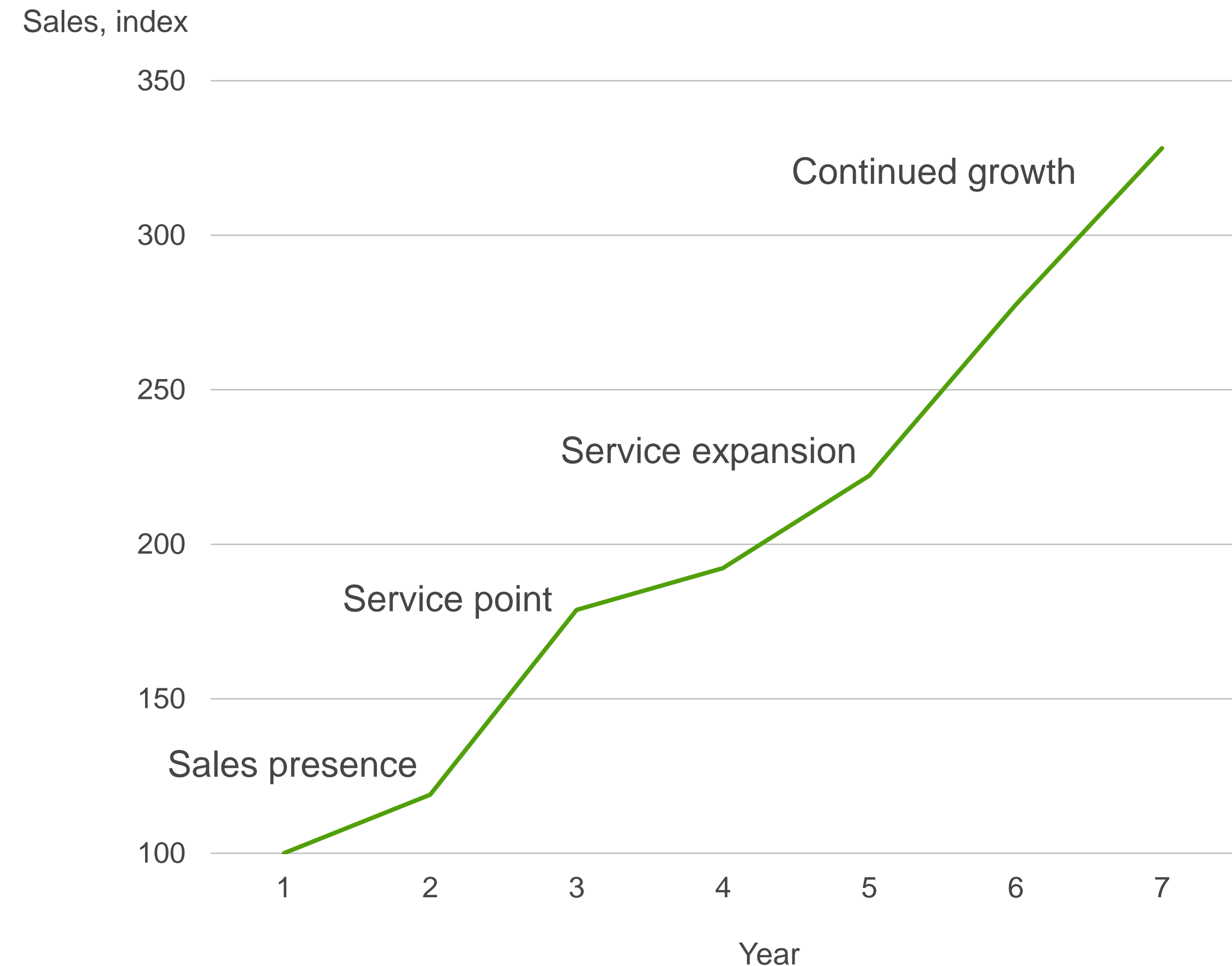


# Growth through increased distribution and service coverage

## Repeatable growth model

- Wider sales presence: improved customer reach
- Logistics solutions and terminals: improved service coverage
- Local scale: enabling wider offering & supply chain efficiency

## Example country growth steps

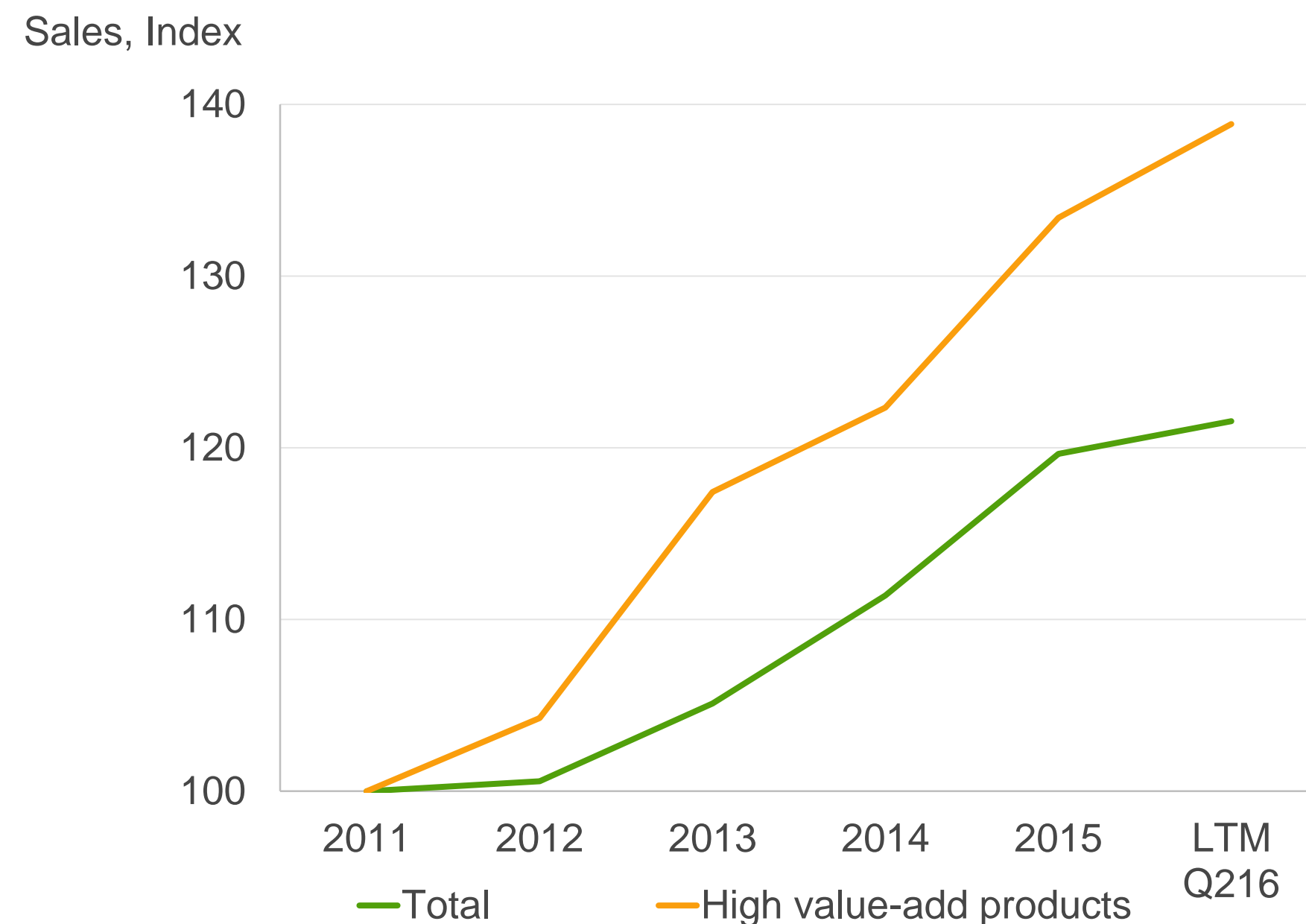




## Growth through wider product offering

UPM Raflatac's capability to deliver new, innovative solutions to special end-use needs drives growth in high added value segments

Faster growth in high added value products



### Case Pharma:

Increased demand for product safety



### Case Beverage:

Differentiated thin film solutions





## Well positioned for growth

- Strong starting point, positive demand trends
- Proven model to expand distribution and reach new customers
- Product development capability driving growth in high value added segments
- Supported by focused & efficient investments, potentially M&A







**UPM**

The Biofore  
Company