



Paper where possible, plastic when useful.

10 April 2019

Falk Paulsen



Mondi is a global leader in packaging and paper



26,000 employees



Over **100** operations across more than **30** countries



More than **100,000** solutions for our customers



2.4M hectares of forest managed



Group offices in Johannesburg, London and Vienna



Primary listing on the JSE Limited for Mondi Limited



Premium listing on the London Stock Exchange for Mondi plc



FTSE4Good Index Series
JSE's Socially Responsible Investment Index



Strong portfolio of packaging and paper solutions



We produce pulp, paper and plastic films and develop and manufacture effective industrial and consumer packaging solutions.

Fibre Packaging

 **70 operating sites**

 **29 countries**



Containerboard



Corrugated packaging



Kraft paper



Industrial bags



Extrusion coatings

Consumer Packaging

 **29 operating sites**

 **12 countries**



Consumer goods packaging



Personal care components



Release liner



Technical films

Uncoated Fine Paper

 **6 operating sites**

 **4 countries**



Office paper



Professional printing paper

Our global footprint



We operate locally with more than 100 operations in over 30 countries.

Key

Fibre Packaging

- ▲ Paper mills
- Converting operations

Consumer Packaging

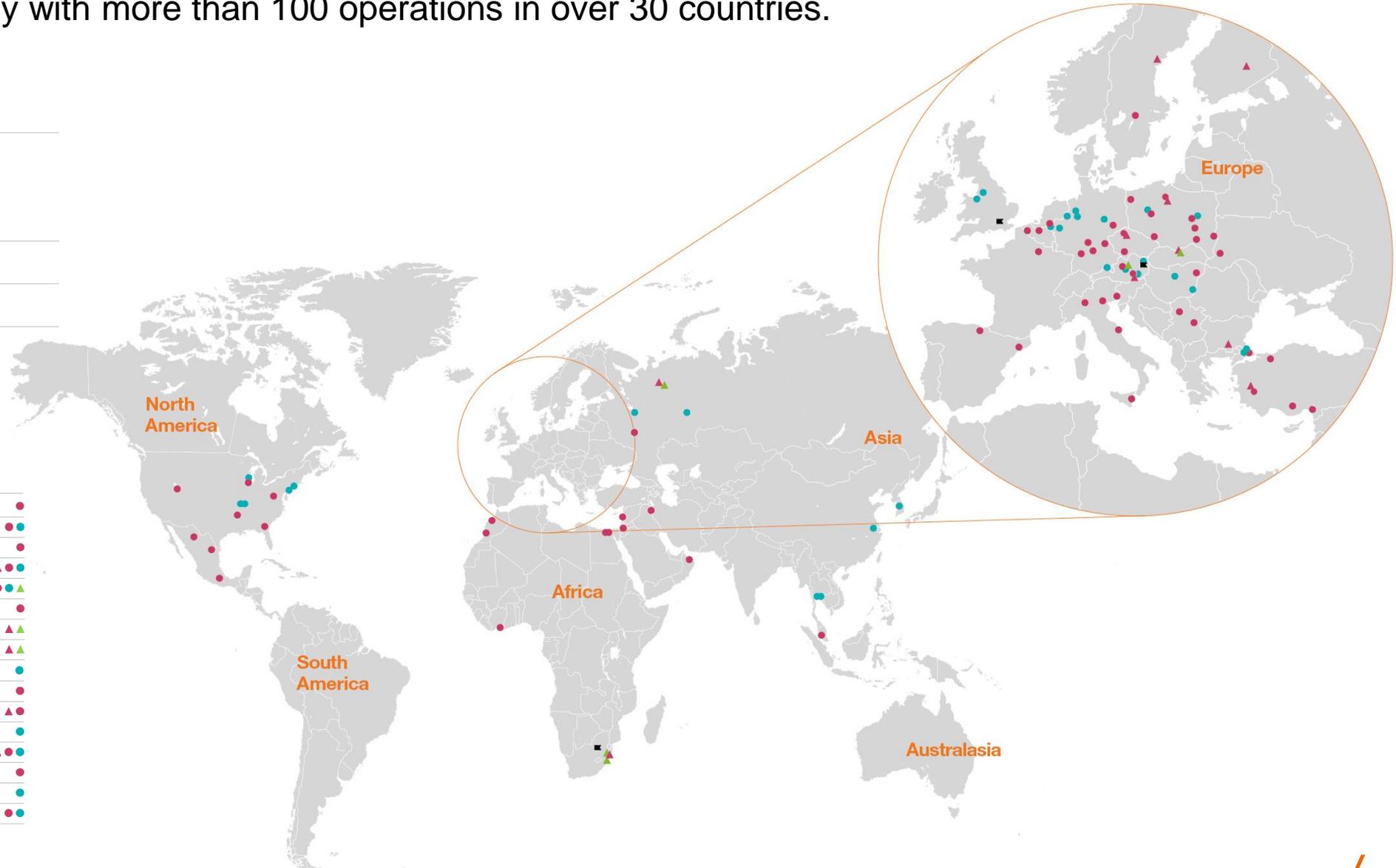
- Consumer Packaging
- ▲ Uncoated Fine Paper

Group offices

- Johannesburg ■
- London ■
- Vienna ■

Production sites

Austria	▲ ● ● ▲	Morocco	●
Belgium	●	Netherlands	● ●
Bulgaria	▲	Oman	●
China	●	Poland	▲ ● ●
Côte d'Ivoire	●	Russia	▲ ● ● ▲
Czech Republic	▲ ●	Serbia	●
Egypt	●	Slovakia	▲ ▲
Finland	▲	South Africa	▲ ▲
France	●	South Korea	●
Germany	● ●	Spain	●
Hungary	● ●	Sweden	▲ ●
Iraq	●	Thailand	●
Italy	●	Turkey	▲ ● ●
Jordan	●	Ukraine	●
Lebanon	●	UK	●
Malaysia	●	US	● ●
Mexico	●		



A large, crumpled clear plastic bag floats on the surface of the ocean. Below the waterline, the bag is much larger, illustrating the concept of an iceberg. A silhouette of a whale is swimming in the water to the left of the bag. The sky is blue with white clouds.

Our common problem: Plastic Waste

OCEAN PLASTIC

"In a business-as-usual scenario, the ocean is expected to contain 1 ton of plastic for every 3 tons of fish by 2015, and by 2050, more plastics than fish (by weight)"

~9,000,000

tons of plastic waste leak into the ocean every year (2019 calculate)

3%

of the plastic waste are found at ocean surface, making clean-up challenging

~190,000,000

tons of waste are currently in the ocean (2019 calculate)

50%

Plastic consumption is expected to grow by +50% by 2050



The big Question: What will the future of packaging look like?

Packaging material used

52%¹

(33% flexible
and 19% rigid)

plastic

43%

combined or alternatives

5%¹
paper

Global recycling rate

14%²
plastic

26%
Combined or
alternatives

60%³
paper

Mondi's approach

A decorative graphic on the left side of the slide, consisting of several overlapping, curved, light orange lines that form a circular, swirling pattern.

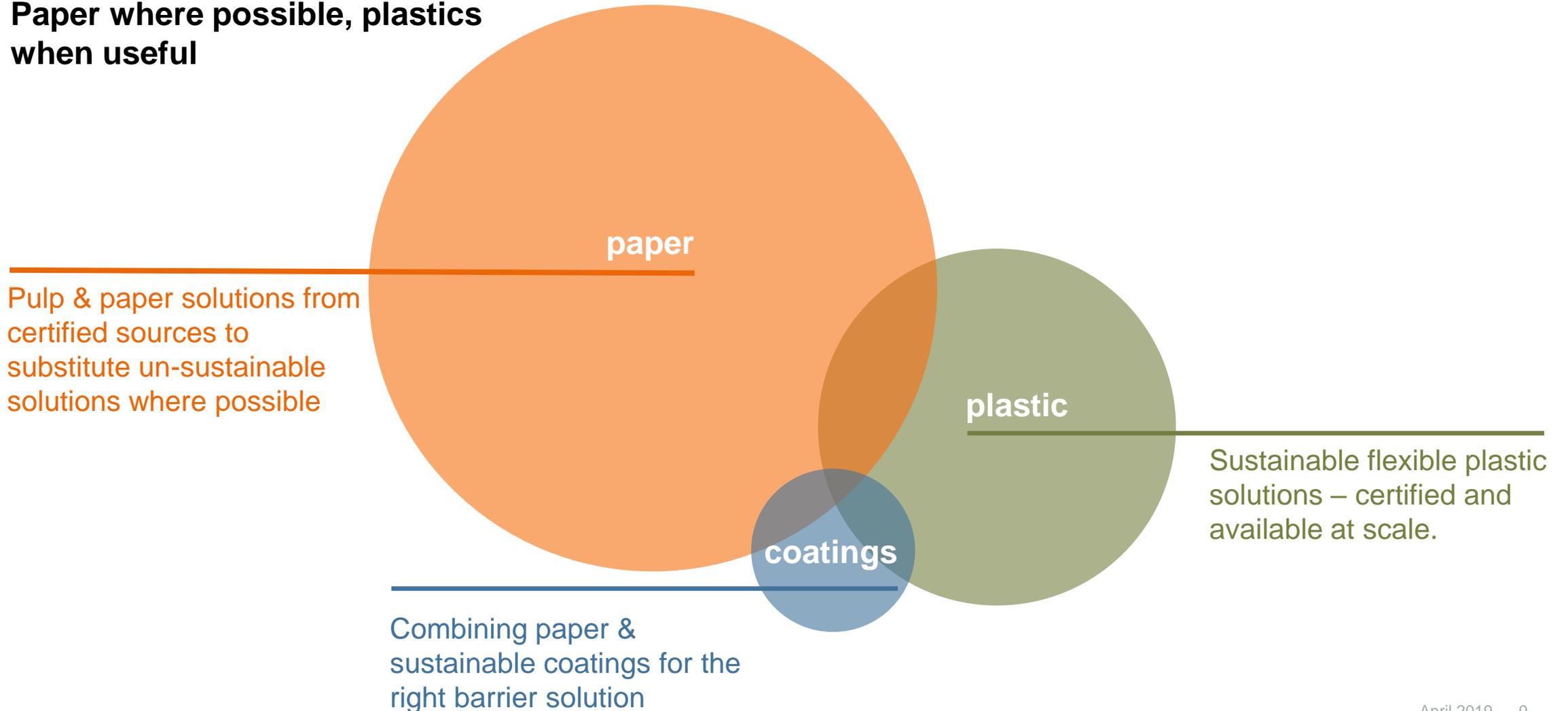
Paper where possible,
plastic when useful.

Unique position to offer holistic view on sustainable materials



Mondi EcoSolutions

Paper where possible, plastics when useful



perFORMing

The #1 natural, formable paper

perFORMing is the #1 natural, brown formable paper solution for food, portion packs and trays for numerous other applications.

perFORMing combines excellent packaging properties and optimal formability while reducing plastic use by up to 80%.

- Natural look and feel
- Up to 80% less plastic packaging
- Soft and smooth surface with high barrier functionalities
- Multiple depths and forms possible



perFORMing

The #1 natural, formable paper.

Customer examples

- Leclerc – France



- REWE Austria – JA! Natürlich



Sustainex®

The eco-friendly packaging future

Sustainex® product portfolio represents a unique family of innovative biodegradable and compostable packaging materials featuring excellent sealability, gas and grease barrier, and thermal resistance.

- Derived from renewable sources biodegradable & compostable (DIN EN 13432) eligible for:
 - Organic recovery (composting & anaerobic digestion)
 - Energy recovery



EcoSolutions: The Frosch Pouch Case Study

Collaborating to create a 100% recyclable packaging

In a joint project, Werner & Mertz, Mondi, EPEA Switzerland (Cradle to Cradle®), Der Grüne Punkt – DSD and Institut cyclos-HTP created the Frosch Pouch and set new standards in sustainable packaging.

The new Frosch Pouch is:

- A forerunner of EcoSolutions
- 100-percent recyclable
- Polyethylene
- With detachable decorative panels
- Patented
- Replaces conventional flexible packaging



EcoVantage



The eco-image booster

Consumers expect a brand to reflect their personal attitudes towards a sustainable lifestyle. They will appreciate a bag made from this paper as a reliable shopping companion and eco-friendly image booster.

- 3 paper grades with different shares of recycled fibres
- Low substance range starting 70 gsm
- Natural look and feel
- Better printability than 100% recycled fibre papers



SKOG for Food – sustainable and fresh

(Sun)Shine in your field

“ SKOG for Food is the result of nearly two years of intensive development. Consumers will experience eco-friendly packaging which even helps lengthen the time food can be stored at home. ”

Marcin Śpiewok, Business Development Manager, SILBO

- Sustainable packaging for filling on vertical form-fill-seal machines
- Double-sided coating = required barriers + the right sealing properties
- Gas permeable = keeps produce fresh longer
- Available with biodegradable coating Sustainex® for an even more eco-friendly packaging solution

Related article: [Eco-packaging breakthrough](#) 





Contribute to a better world

Packaging and paper, *sustainable by design*, to best meet the needs of each customer, their products and the planet – paper where possible, plastic when useful



Stay in touch

Learn more about the industry, latest trends and stories from all across Mondi on our online newsroom mondigroup.com/newsroom.

Join the conversation – we'd love to hear from you!



Falk Paulsen

Tel: +49 (0)8035 901 450

Mobile: +49 (0) 172 864 3811

Email: falk.paulsen@mondigroup.com



Forward-looking statements disclaimer

This document includes forward-looking statements. All statements other than statements of historical facts included herein, including, without limitation, those regarding Mondi's financial position, business strategy, market growth and developments, expectations of growth and profitability and plans and objectives of management for future operations, are forward-looking statements. Forward-looking statements are sometimes identified by the use of forward-looking terminology such as 'believe', 'expects', 'may', 'will', 'could', 'should', 'shall', 'risk', 'intends', 'estimates', 'aims', 'plans', 'predicts', 'continues', 'assumes', 'positioned' or 'anticipates' or the negative thereof, other variations thereon or comparable terminology. Such forward-looking statements involve known and unknown risks, uncertainties and other factors which may cause the actual results, performance or achievements of Mondi, or industry results, to be materially different from any future results, performance or achievements expressed or implied by such forward-looking statements. Such forward-looking statements and other statements contained in this document regarding matters that are not historical facts involve predictions and are based on numerous assumptions regarding Mondi's present and future business strategies and the environment in which Mondi will operate in the future. These forward-looking statements speak only as of the date on which they are made.

No assurance can be given that such future results will be achieved; various factors could cause actual future results, performance or events to differ materially from those described in these statements. Such factors include in particular but without any limitation: (1) operating factors, such as continued success of manufacturing activities and the achievement of efficiencies therein, continued success of product development plans and targets, changes in the degree of protection created by Mondi's patents and other intellectual property rights and the availability of capital on acceptable terms; (2) industry conditions, such as strength of product demand, intensity of competition, prevailing and future global market prices for Mondi's products and raw materials and the pricing pressures thereto, financial condition of the customers, suppliers and the competitors of Mondi and potential introduction of competing products and technologies by competitors; and (3) general economic conditions, such as rates of economic growth in Mondi's principal geographical markets or fluctuations of exchange rates and interest rates.

Mondi expressly disclaims

- a) any warranty or liability as to accuracy or completeness of the information provided herein; and
- b) any obligation or undertaking to review or confirm analysts' expectations or estimates or to update any forward-looking statements to reflect any change in Mondi's expectations or any events that occur or circumstances that arise after the date of making any forward-looking statements,

unless required to do so by applicable law or any regulatory body applicable to Mondi, including the JSE Limited and the LSE.