

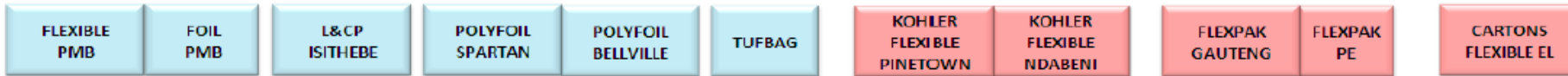
Nampak Flexible

An introduction

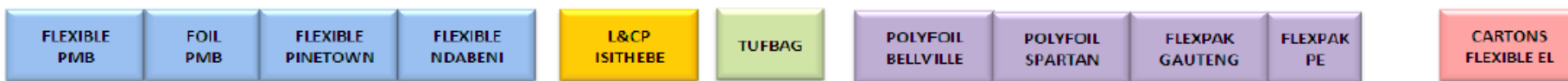


Our History

ORIGINAL NAMPAK & KOHLER



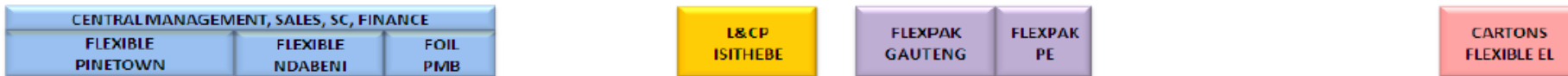
NAMPAK KOHLER MERGER CREATES FLEXIBLE CLUSTER



2005: PROJECT SHREK COMBINES KZN SITES, POLYFOIL SPARTAN CLOSED DUE TO BAG LEGISLATION, TUFBAG SOLD, POLYFOIL & FLEXPAK MERGE



2006/7: POLYFOIL SOLD. INTEGRATE FLEXIBLE MANAGEMENT, IBM PROCESS INTRODUCED



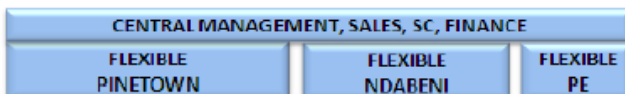
2008: FOIL INTEGRATED INTO PINETOWN, FLEXPAK JOINS CLUSTER, EAST LONDON INTEGRATED, FOAM LAUNCHED



2009: FLEXPAK GAUTENG SOLD, FLEXIBLE EXPANSION AT PINETOWN, PE INTEGRATED, FOAM CLOSED



2010: L&CP SOLD



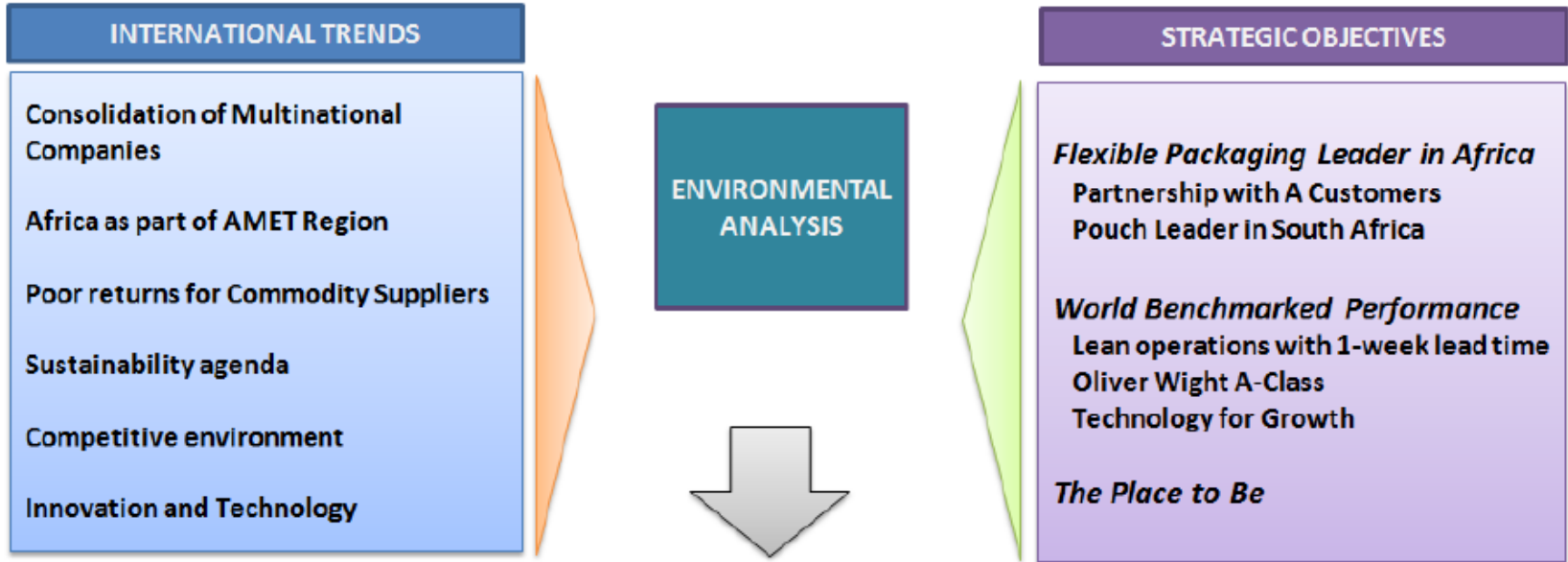
Empowerdex

- Level 3 - Group

Standards

- ISO 9001
- ISO 14001
- ISO 18001
- BRC
- AIB (American Institute of Bakeries international)
- H.A.C.C.P. standards are applied as part of AIB certification
- Occupational health and safety program & Waste management listed in the ISO 9001 program
- Oliver White – A Class business - IBM
- Sedex accreditation

Strategic Plan Summary



Market Leadership	Investment Focus	STRATEGIC PLAN	Operational Excellence	Africa & Export
A-Customers	Extrusion & Extrusion Lamination	Place to Be	Planning and Control Lean	Clear Strategic Focus into Africa
Customer Intimacy	Printing & NOC	Culture Process & Grid	Modern Shopfloor	Flexible driven
Argil & KAM based	Pouch Strategy	Technical Skills	Benchmarked Performance	Footprint Expansion
Aim for 70% of A's + Selected B & C's	Green Compliance	Recruitment	Accreditations	Investment & Footprint
Margin and Profit driven	Innovation Pipeline	Succession and Development		Other Markets

- ❑ **Continued strong focus on major multinational customers**
- ❑ **Protect and grow niche markets**
- ❑ **Africa growth**

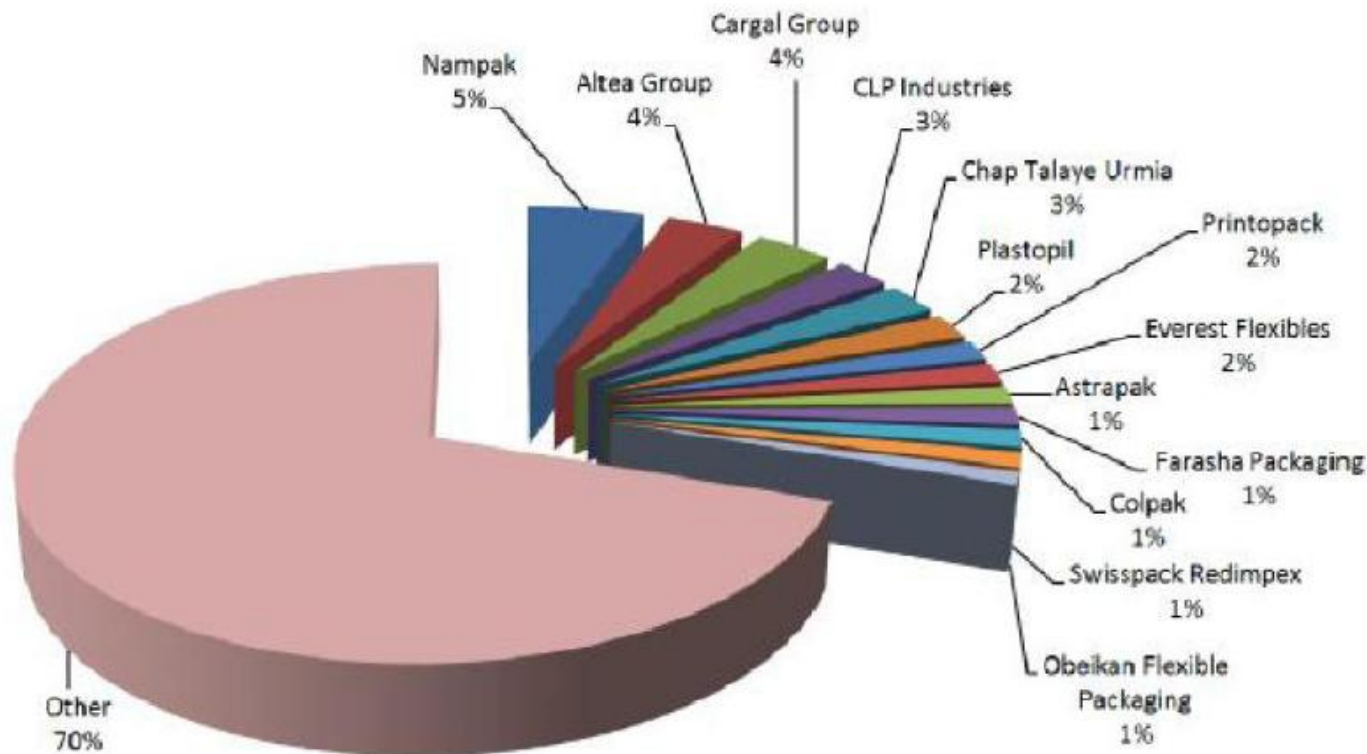
Current Issues and Threats

- ❑ Multi-nationals doing global procurement (off shore competition)
- ❑ Commoditization of key products & general international overcapacity
- ❑ Local market dependence, exports below 10% of total.

The World Flexible Packaging Market 2009



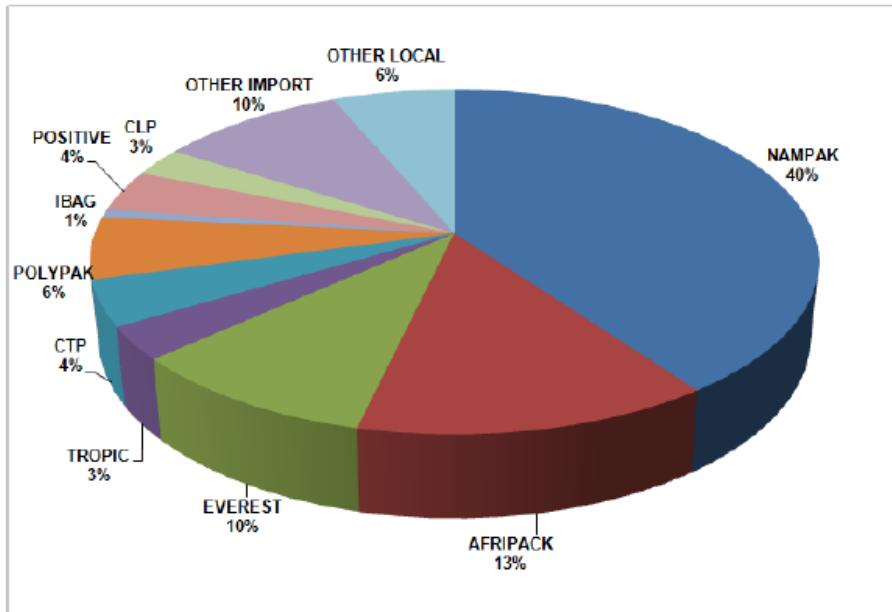
FIGURE 2. LEADING FLEXIBLE PACKAGING PRODUCERS IN MIDDLE EAST & AFRICA 2008



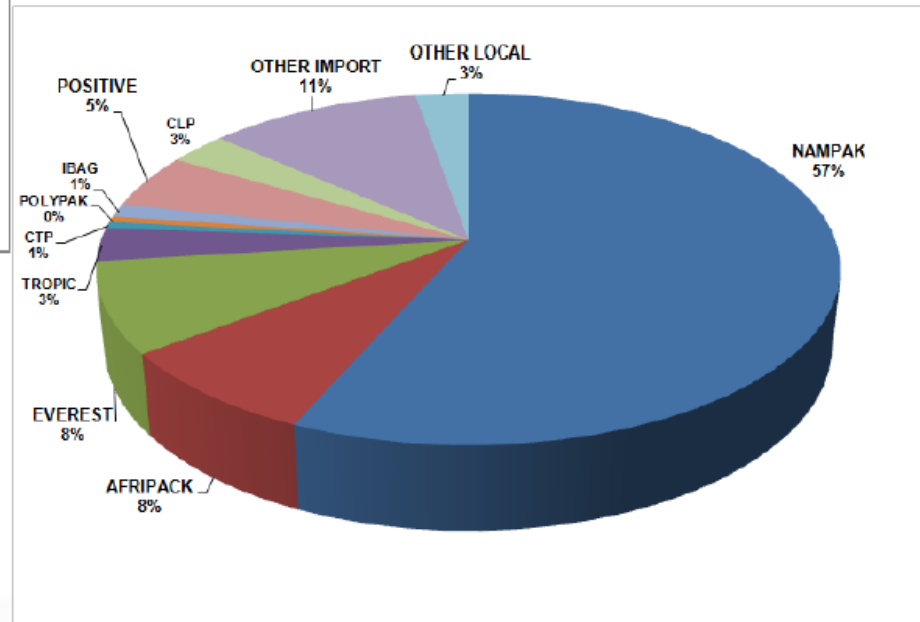
Source: PCI Films Consulting Ltd / Industry sources

Market Share: South Africa

Total SA Market Share



A-Customer Market Share



Major Customers

Major Flexible Customers

Unilever

Simba

Tiger

Cadburys

Mars

AVI (National Brands)

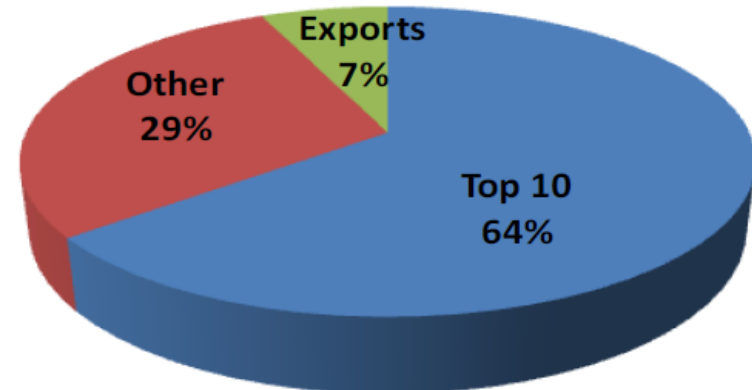
Distell

Nestle

Inter Group (Nampak Tissue)

Colgate

Top 10 Share of Total Turnover



Recent Product Launches



Recent Product Launches



Bag in Box and Liquid Bags



Stand Up Pouches



- **Regional & Global FMCG customers**
- **Niches**
 - Pouches
 - Liquids
 - Foil
 - Rubber Release
 - Exports
- **African Expansion**

- **Turnover: R 300m Volume : 4300 Tons**
- **262 Employees**

- **Flexo & Gravure printed laminated, preformed bags, stand-up pouches, block bottom & gusseted bags & pouches, shaped pouches, extrusion lamination.**
- **Bags with fitments for BIB wine & fruit juice business**
- **Liquid / Beverage Packaging**
- **Aseptic Bags**
- **Reel Stock**
- **Currently developing Retort**

The Ndabeni Site: Site Rules and Regulations

- In case of emergency, follow your hosts instructions.
- Wear PPE provided.
- No jewelry other than wedding bands and closed loop earrings.
- No smoking, chewing gum and food or drink.
- No glass or ceramic items.
- Wash hands on entry or after visiting ablutions.
- Advise your host of any of the following medical conditions:

Asthma	Diarrhea
Vomiting	Flu-like symptoms