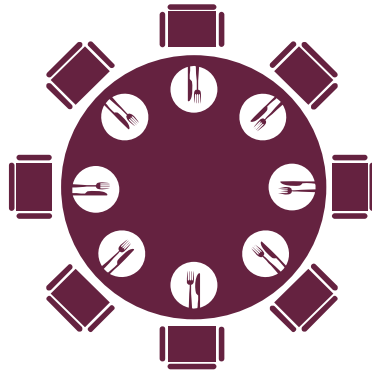


VisionOn Plastics and Packaging

A TowerBrook roundtable



London
Friday September 27, 2019



TowerBrook VisionOn events bring together sector experts, senior managers and members of our team in a small, private forum where they can exchange ideas and chart new opportunities for sustainable value creation.

Through sharing our experience and insights, we aim to make mutually beneficial connections, stimulate creative thinking and partner with leaders to deliver value for our investors, now and in the future.

**Pierre-Marie de Leener**

Chair of Advisory Board, Flint Group; former Chair, Braas Monier; former President of PPG (Europe), subsequently Executive VP and member of the Executive Committee, PPG (USA)

**Martin Hargreaves**

Former Managing Director, Plastipak Europe; 30+ years' experience in the PET plastic packaging & rPET recycling industry

**Patrick Verschelde**

Member of TowerBrook Senior Advisory Board; Chair of AustroCel Hallein; President and CEO, Metallo; former CEO, Lyonnaise des Eaux; former CEO, Air Liquide America

**Michele Volpi**

Former CEO, HB Fuller; former Board member of US investment bank Piper Jaffray; former Board member, Saipem Oil & Gas

**Alessandro Carlucci**

Member of TowerBrook Senior Advisory Board; former CEO of Natura; Chair of Arezzo&Co; Chair of Business for Social Responsibility

**Ian Hudson**

Member of TowerBrook Management Advisory Board; Chair, Carbios; Board member, Arkema; former President, Dupont EMEA

**Philippe von Stauffenberg**

Founder and Managing Partner, Solidus Partners LLP; former Executive Chair, Der Grüne Punkt; former Non-executive Director, Valpak

**Gail Klintworth**

Non-executive Director, Tiger Brands (SA), MAS Holdings (Sri Lanka); Chair, Shell Foundation. Former Executive Director, Old Mutual; Chief Sustainability Officer, Unilever; Business & Transformation Director, Business and Sustainable Development Commission

Focus on the present



Conventional vs. digital printing
for plastic packaging

Pierre-Marie de Leener

Reusable packaging in the
PET beverage market

Martin Hargreaves

Focus on the business



Building zero-waste business models

Patrick Verschelde

Winning the war for talent
in an unsexy industry

Michele Volpi

Focus on the customer



Teaching the customer to
become part of the solution

Alessandro Carlucci

Winning hearts and minds
with better packaging design

Ian Hudson

Focus on tomorrow



Emerging technologies that drive innovation
in packaging

Philippe von Stauffenberg

Bright spots in unusual partnerships and
venture accelerators

Gail Klintworth

Talking points

“ Packaging is the first layer of your brand promise ”

“ When you have pressure it is amazing what innovation can occur ”

“ Change in consumer behaviour can happen very rapidly. Who would have thought a few years ago that the diesel engine would be dead? ”

“ To close the loop, we must change consumer perceptions of single-use plastics as non-recyclables ”

“ With 15 million square kilometres of plastic oceans, we need innovation that scales to the challenges of the real world ”

“ Unfortunately, investment in new recycling technologies requires a 15 year horizon ”

“ “Recycling” is misleading, since most plastic is down-cycled into commodity bulk products ”

“ In the future consumers and companies will want/need to trace products all the way back through the value and production chains to their constituent raw materials ”

“ The move to zero waste business models is not just a ‘nice to have... ’ ”

“ Dematerialisation (with smaller packages) is an important way to reduce packaging waste ”

“ ... it is a strategic imperative and will have a dramatic positive impact on valuation ”

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