

creating
leaders

passionately & relentlessly



Amcor 2014 Asia analyst trip
Jakarta Tuesday 20 May 2014

Flexibles Asia Pacific

Amcor Flexibles Indonesia overview



Overview (Including Bella Prima)

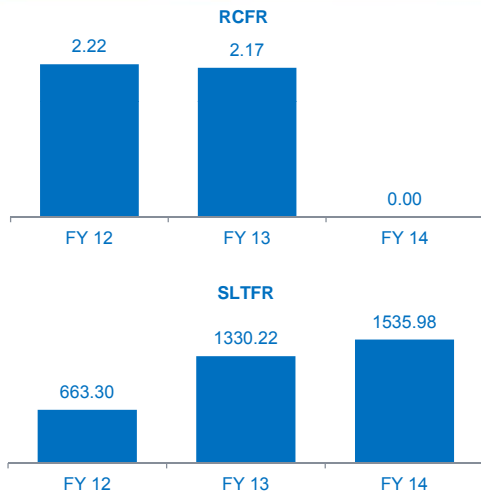
- 3 plant located in Jakarta
- 1,000 co workers

End game aspiration

- Growth in targeted segments
- Rated tier 1 supplier by customers in terms of service level and product safety
- Low cost export base servicing
 - 3rd party customers
 - Amcor's Asia Pacific business



Safety KPI and Project Status



Main Safety Projects

No	Project	Target	Status	
1	In-Process Flammable Liquid Handling	Meet with FMG Recommendation Jun 13	Submitting the SOP to system, will be communicated to co worker on Aug	
2	Behavior program improvement	Active communication of Hazard Alert and Unsafe action closures (90% status from report)	The audio visual media has been installed and converting the audio video material	
3	Safety Machine Book	All machines will be equipped with Safety Machine Book	Has been developed to MC 5027	
4	Sustainability Project: Water Usage and GHG Emission Reduction.	FY14/15 Water: 1.12 GHG: 3.8	The new Water Flow meter has been installed to replacing the at each well.	
5	5 S	Each area has their own 5S standard	Has been conducted the 3 rd round of audit to maintain the consistencies of cleanliness	

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Bella Prima acquisition – The journey continues

- **Two plants located in Jakarta**
 - Focussed on food and beverage end markets
 - Strong position with MNC's and large local customers
- **Sales approximately A\$30 million**
- **Good fit with existing operations**
- **Expected to close early FY 2015**



Expands position in the high growth Indonesian market



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Bella Prima product overview

Bella Prima is a specialist in labeling and labeling with film, pouches, and bag-making capabilities

BOPP and PVC Labels



Multi-Colour Decorative heat shrinkable sleeves (PVC & OPS)



Multi-Layer BPET Laminated Lids for PP Cups



Multi-Layer Laminated Aluminum Foil Lid for Dairy Products



Pealable Lids and Decorative Sleeves for Cup Noodles



Multi-Layer Laminated Wrappers for Sachets/Bags; Standing Pouch



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Amcor Flexibles Indonesia capabilities

Gravure Printing



Lamination



Cerutti Printing and Dry Lamination



Key Capabilities – Amcor Jakarta plant

Machine Description

- Gravure Printing
- Lamination (Dry, Solvent Free & Extrusion)
- Bag Making
- Slitting / Rewinding
- In-house Cylinder Capability

Printing & Lamination In-line Capability

- Cerutti and Dry Lamination

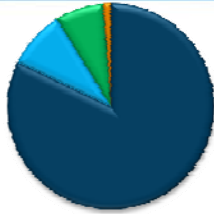
Accreditations – Amcor Jakarta plant

- ISO 9001.2.2008
- ISO 14000
- ISO 18001



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Amcor Flexibles Indonesia sales by Market Segment



■ Food ■ Medical & Pharma ■ HPC ■ Other

Amcor is amongst of the top 10 flexible packaging manufacturers in Indonesia

Market Served | Business Portfolio

Food

- Snacks & Biscuits
- Confectionary
- Beverages
- Culinary
- Frozen Food
- Dairy Products

Household and Personal Care

- Personal Care
- Household Products
- Car Care Products

Pharma

Other

- Nutritional
- Industrial
- Chemical Products

Products



Sales by market segment excludes the acquired Bella Prima business

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Indonesian macro environment

Indonesia: at the center of the next wave of emerging economies

ECONOMY GLOBAL RANK⁽¹⁾

POPULATION GLOBAL RANK

URBAN POPULATION

URBAN POPULATION % TOTAL GDP

GDP PER CAPITA (usd)

TODAY

NEXT 20 YEARS

16th

7th

4th

4th

127 MILLION (53%)

196 MILLION (71%)

74%

86%

3,660

7,023⁽²⁾

- Regarded as among the world's brightest growth stories
- Highly attractive fundamental economic, demographic, and geographic picture
- Among the most stable countries in the region
- Driven by demographic forces as well as government-led macroeconomic strides, the economy is transforming rapidly:
 - A young and rapidly urbanising populace
 - Its consumer class is growing stronger than any economy in the world, apart from China and India
 - Key macroeconomic indicators are generally positive (inflation has fallen from double-to-single digits, and government debt as a share of GDP is lower than the vast majority of advanced economies)



(1) McKinsey Global Institute.

(2) FY2017 figure

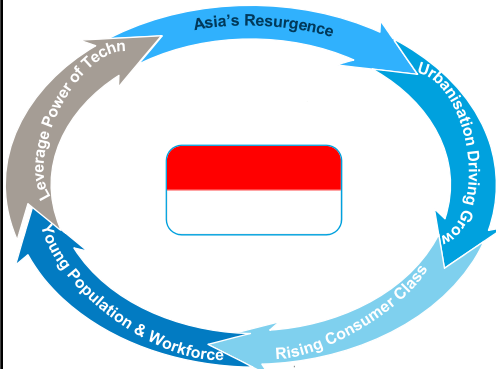
(3) Includes consumer services, agriculture and fisheries, resources, and education.



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Indonesia – key growth drivers

Indonesia is expected to experience strong economic growth of roughly 7% per year until 2030⁽¹⁾ and has the potential to overtake Germany and the United Kingdom to become the 7th largest global economy by that time



(1) Indonesian government estimates. McKinsey estimates 5-6% growth through 2030.
 (2) Per The McKinsey Global Institute based on government GDP growth estimates of 7% per annum; if 5-6% growth is achieved, 90 million will enter the consumer class



Asia's Resurgence

- Regional growth creating unprecedented regional prosperity
- Urbanisation is a key driver of rising incomes: urbanisation and GDP/capita grow in tandem
- Indonesian exports – particularly to China and India – have accelerated recently
- Rising food demand; opportunity to shift from domestic provider to international hub

Urbanisation Driving Growth

- Urban growth – in Jakarta and more so in other cities – will be dramatic
 - A highly important stimulus: urbanisation rate could hit 71% in 2030 from 53% today
- Around 90% of urban areas with >7% growth are outside of Java

Rising Consumer Class

- 125 million Indonesians expected to join the consuming class in the next 20 years⁽²⁾
- This will be the largest increase outside of China and India (for scale, this doubles the overall population growth of Brazil and Egypt)

Young Population / Workforce

- One of the world's youngest demographic profiles, with 55% under the age of 30
- Women increasingly joining the workforce which will transform food consumption trends

Leverage Power of Technology

- Technologies – digital, "green", and other – have massive potential to impact growth
- For example, Indonesia has the largest geothermal resources in the world⁽¹⁾