Avery Dennison Corporate Profile

Presenter
Avery Dennison Corporation
Date
About Us
R. Stanton Avery invented the world’s first self-adhesive label as a way to merchandise objects. He founded Avery Adhesives in downtown Los Angeles in 1935. The company merged with Dennison Manufacturing in 1990 to form Avery Dennison.
A Global Leader

- Founded in 1935
- Sales of $6 billion in 2015
- Fortune 500 ranking: 427 (NYSE: AVY)
- Two industry-leading businesses with operations in over 50 countries
- More than 25,000 employees worldwide
- Headquartered in Glendale, California
Our Vision

To make every brand more inspiring and the world more intelligent.
What We Do

We are a global leader in labeling and packaging materials and solutions. Our applications and technologies are an integral part of products used in every major market and industry. Our products and solutions enhance brands, improve consumer product performance, and deliver information. They include:

- Materials for brand labeling and packaging of consumer and functional products
- Apparel and footwear label design and manufacture, high-definition graphic embellishments, sustainable packaging, price ticketing, and RFID-enabled inventory solutions
- Information management materials, products and solutions
- Graphic imaging media
- Specialized adhesives, coatings, films and RFID technologies
- Performance engineered bonding, tapes and adhesives application solutions
Our Footprint

- Over 170 manufacturing and distribution facilities located in more than 50 countries
- Product sales in nearly 90 countries
- Committed to building prosperous communities where our employees work and live
Competitive Advantages

- Industry leader with economies of scale
- Global footprint reaching customers worldwide
- Strong presence in emerging markets (47% of sales in 2015)
- Decades of expertise in materials science, specialized technology and manufacturing
Our Businesses
## Our Businesses

### Pressure-sensitive Materials Segment
- Materials Group
- Performance Tapes

<table>
<thead>
<tr>
<th>2015 Sales (in millions)</th>
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<td>$4,374</td>
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### Retail Branding and Information Solutions Segment
- Retail Branding and Information Solutions
- Printer and Fastener Solutions

<table>
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<th>2015 Sales (in millions)</th>
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<td>$1,520</td>
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### Vancive Segment
- Vancive Medical Technologies

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<th>2015 Sales (in millions)</th>
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<td>$73</td>
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Value: Our technologies and materials enhance brands’ shelf, store and street appeal; inform shoppers of ingredients; protect brand security; improve operational efficiency and provide visual information that enhances safety.

Market segments: Food, beverage, beer, wine and spirits, household products, health and beauty, durable, pharmaceutical, goods tracking, fleet and architecture, traffic and safety, transportation OEM.

What we make: Avery Dennison® and Fasson® pressure-sensitive and non-adhesive papers, films and foils in roll form, graphic imaging media, reflective materials.

Applications and solutions: Prime labels, branding, functional and decorative packaging; promotional graphics, vehicle wraps, signage, safety and validation markings, retail and architectural graphics.

Customers: Label converters who work with consumer product manufacturers, contract packagers and package design agencies; printers and sign fabricators; commercial graphics distributors; government agencies; architects; fleet and building operators; transportation OEMs.
Graphics Solutions

- **Value:** We are a world leader in graphic films that identify, promote and inform. We use our extensive experience and creativity to help companies across the world bring brand visions to life in powerful and exciting ways.

- **Market segments:** Vehicle, fleet, architecture, marine, indoor and outdoor floor, window and wall advertising, transit.

- **What we make:** Avery Dennison® pressure-sensitive films for wide format printing for use in the graphics industry.

- **Applications and solutions:** Screen and Cut vinyl films, Supreme Wrapping Film for color change vehicle wraps, Digital Films for indoor, outdoor and vehicle use.

- **Customers:** Label converters who work with consumer product manufacturers, contract packagers and package design agencies; printers and sign fabricators; commercial graphics distributors; government agencies; architects; fleet and building operators; transportation OEMs.
**Value:** Our technologies, service, and materials provide visual information that enhances safety.

**Market segments:** Traffic and safety, vehicle license plates and validation markings, transportation OEM, construction work zone.

**What we make:** Avery Dennison® pressure-sensitive retroreflective materials for traffic signs, license plates, validation decals, work zone applications and vehicle conspicuity markings. Inkjet technologies for long-term durable and specification compliant traffic signs.

**Applications and solutions:** Vehicle licensing, validation and safety markings; traffic control signage and converting; work zone delineation.

**Customers:** Sign fabricators; work zone contractors; U.S. federal, state and local government agencies; fleet operators; transportation OEMs.
Performance Tapes

- **Value**: We provide innovative pressure-sensitive adhesive products and solutions for a broad range of industrial bonding and personal care applications.

- **Market segments**: Automotive, electronics, appliances, packaging labels, graphics and signs, building and construction, personal care.

- **What we make**: We develop and manufacture high-performance pressure-sensitive tapes, bonding adhesives and diaper closures.

- **Applications and solutions**: Noise and vibration damping, high-performance bonding and lamination, packaging closures and diaper closures.

- **Customers**: Industrial OEMs; original design manufacturers; converters and systems integrators; automotive tier suppliers; durable goods and appliance manufacturers; component manufacturers; personal care products manufacturers.
Retail Branding and Information Solutions

- **Value**: We provide intelligent, creative, and sustainable solutions that elevate brands and accelerate performance through the global retail supply chain.

- **Market segments**: Global retail apparel and footwear supply chains, food service and supply chains, logistics, pharmaceuticals, automotive.

- **Applications and solutions**:  
  - **Elevating Brands** – Creative design services; brand embellishments; graphic price tickets, tags and labels; sustainable packaging.
  
  - **Accelerating Performance** – Inventory accuracy and visibility; price management/global compliance; brand protection; RFID-enabled inventory and loss prevention solutions.

- **Customers**: Apparel brand owners, retailers, and manufacturers; consumer goods manufacturers; restaurant, grocery, drug and food service chains.
Printer and Fastener Solutions

- **Value**: We provide intelligent, sustainable and innovative labeling, printing and fastening solutions that accelerate supply chain performance, increase productivity, and elevate the consumer experience, while shaping industry standards.

- **Market segments**: Global apparel and general retail supply chains, food service and supply chains, logistics and general manufacturing and automotive.

- **What we make**: We develop and manufacture tabletop and mobile printers, handheld labelers, proprietary labeling supplies, and retail, industrial and automotive fastening solutions.

- **Applications and solutions**: Price management and promotions; inventory accuracy, visibility and loss prevention; brand protection; food safety and compliance; securing, attaching and packaging solutions.

- **Customers**: Apparel brand owners, retailers, consumer goods manufacturers and distribution centers; automotive OEMs and tier suppliers; food industry: supply chain, restaurants, grocery, food service chains.
Vancive Medical Technologies

- **Value:** Using the most advanced proprietary adhesive and material technologies and extensive manufacturing capabilities, we create products that make healthcare easier for everyone.

- **Market segments:** Primary focus: surgical, ostomy, wound care.

- **What we make:** Surgical films and tapes, wound dressings, ostomy products.

- **Applications and solutions:** BeneHold™ Absorbent Wound Dressings, BeneHold™ CHG Adhesive technology, InteliShield™ Barrier Film for ostomy applications, advanced medical tapes and pressure-sensitive adhesives.

- **Customers:** Medical OEMs, device manufacturers and distributors.
Sustainability
Our Sustainability Purpose

At Avery Dennison, we’re a force for good embedded in industries and communities worldwide. We’re challenging ourselves and others to reach higher and think bigger to improve the quality of all life.
2025 Sustainability Goals

- Greenhouse Gas Emissions
- Paper
- Film
- Chemicals
- Products and Solutions
- Waste
- Transparency
- People
Sustainable Product Portfolio

- Introduced the industry’s thinnest label liner; portfolio using Forest Stewardship Council® (FSC)-certified papers, adhesive that facilitates recycling of polyethylene terephthalate (PET) containers

- Offer tools to help customers understand the environmental impact of their products
  - The Avery Dennison™ Greenprint Assessment Tool helps quantify the potential for global warming, solid waste generation and the use of trees, water, oil and energy associated with materials in our products
To address climate change and ensure a sustainable paper supply for our business, we have implemented a responsible paper-sourcing policy. Our goal is to certify the sources of 100 percent of the paper we purchase by 2025, with at least 70 percent being FSC certified.
Corporate Social Responsibility

- The Avery Dennison Foundation advances the causes of education and sustainability in the communities where Avery Dennison employees live and work.

- Encouraging employee engagement within local communities and offering opportunities for hands-on involvement.
We are committed to making Avery Dennison a great place to work for everyone. We’re focusing our efforts on gender diversity:

● By the end of 2018, aim to have 40% women representation in manager and above positions

● We plan to reach our goal by addressing unconscious bias, implementing flexible work arrangements, and developing our female talent
Corporate Leadership Team

- **Mitchell R. Butier**
  - President and Chief Executive Officer

- Georges Gravanis
  - President
  - Materials Group

- Deon Stander
  - Vice President and General Manager
  - Retail Branding and Information Solutions

- Mike Johansen
  - Vice President and General Manager
  - Performance Tapes and Vancive

- Anne Bramman
  - Senior Vice President and Chief Financial Officer

- Anne Hill
  - Senior Vice President and Chief Human Resources Officer

- Sue Miller
  - Senior Vice President, General Counsel and Secretary

- Danny Allouche
  - Vice President
  - Corporate Development
Company Videos

- **Company Vision:** “Inspired Brands. Intelligent World.”
- **Sustainability:** “A Force For Good”
- **Employee Experience:** “A Day in the Life”
- **Company History:** “Gentle Giant”
Have a question or comment?

Contact us by sending an email to Corporate.
CreativeServices@averydennison.com