



SUSTAINABLE *by* DESIGN

Steering international firms through the coronavirus crisis

Presented by: Beatrix Praeceptor
Chief Procurement Officer
Mondi Group



What does MONDi do?



Sustainable by Design

We are a global leader in packaging and paper

Employing around 26,000 people at 100 production sites across more than 30 countries, with key operations located in Europe, North America and Africa

North America

Employees	Production sites
1,700	13

Western Europe

Employees	Production sites
7,300	35

Emerging Europe

Employees	Production sites
9,100	32

Russia

Employees	Production sites
5,300	4

Asia & Australia

Employees	Production sites
700	10

Africa

Employees	Production sites
1,800	7

Key

Corrugated Packaging	Flexible Packaging	Engineered Materials
▲ Mill	▲ Mill	● Converting plant
● Converting plant	● Converting plant	▲ Mill
		▲ Mill

With a diversified portfolio of packaging and paper solutions

INDUSTRY END USES



FMCG and consumer products

E-commerce and POS (point of sale)

Automotive, heavy-duty and other specialised applications

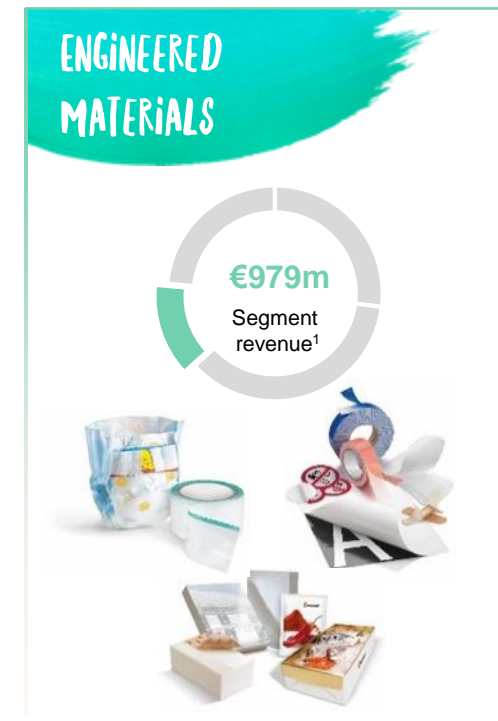


FMCG products

Food service and retail

Cement and building materials

Chemicals, agricultural and other industrial



Baby care, feminine care, adult incontinence, and wipes

Tapes, labels and graphic arts

Food, building and industrial applications



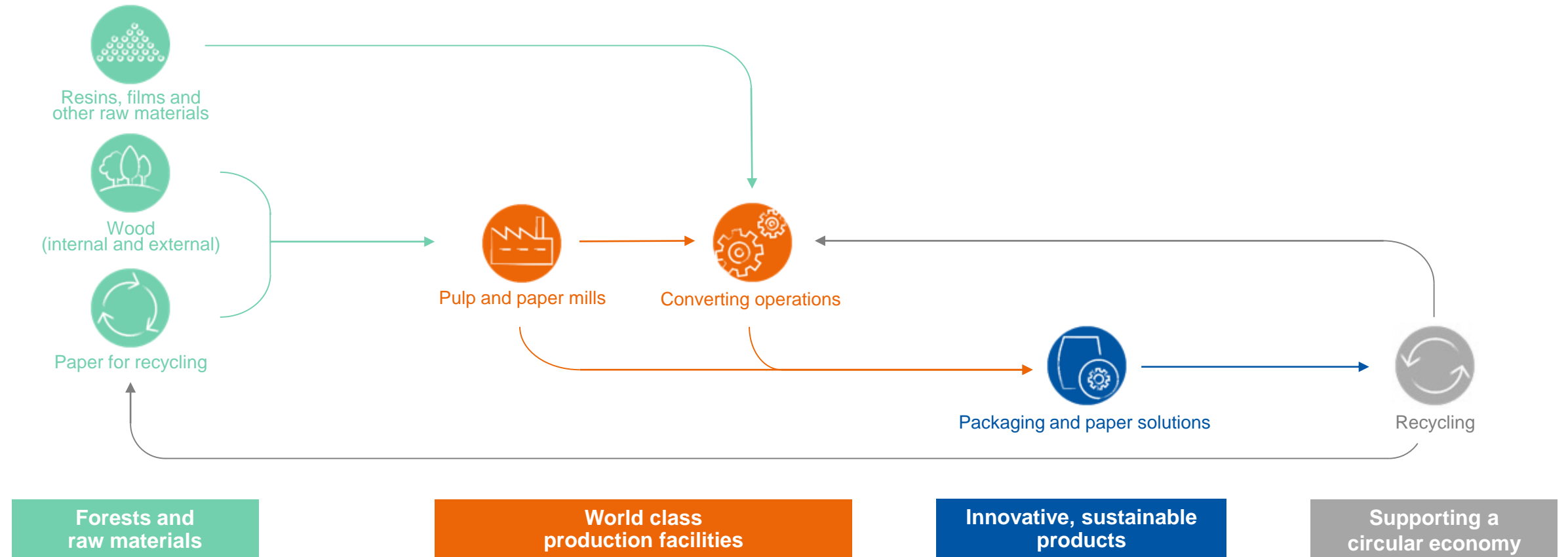
Paper for home and office printers

Paper for professional digital and analogue printing presses

1. 2019 segment revenues (before elimination of inter-segment revenues)

Operating across the value chain

From managing forests and producing pulp, paper and plastic films, to developing and manufacturing effective industrial and consumer packaging solutions



How is Mondi DOING?



Delivering a robust performance in 2019

2019 at a glance

€7,268M Group revenue

15.5% Reduction in total specific CO₂e emissions against 2014 baseline

€1,658M Underlying EBITDA

100% Sustainably sourced fibre (certified or controlled wood)

€1,221M Operating profit

22% Safety: total recordable case rate reduction against 2015 baseline

19.8% Return on capital employed

102% Electricity self-sufficiency

Covid-19 Impact



- Overall Mondi has proven to be quite resilient – well positioned in terms of product portfolio and geographies
- Depending on application we see positive and negative impact
- Good mix of Centralized / Decentralized and a strong entrepreneurial spirit are key

Impact on Supply Chain & Procurement

Long-term strategy payed back in the crisis

People & Communication



- Strong & agile team spirit
- Hands-on approach
- Collaboration
- Structured communication
- Inclusive leadership

Processes



- Clear rules
- Harmonized processes
- Flexibility
- Pragmatic approach

Tools



- Keep it simple
- Backwind for digitalization and automation
- Huge learning curve

- ➔ Impact on our supply chain was managed well despite high effort to keep reliable supply and serve our customers
- ➔ Trust and relationships were the foundation to overcome this crisis (internal and external)

Key Learnings

Prepare for bad times while you are in good times...



1

Trust, empowerment & inclusive leadership are key



2

Relationship with the right business partners needs to be established



3

Digital projects gained momentum



4

Pro-active risk management as new focus area



Thank you!
Feedback & Questions

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