



**CEO Presentation**  
**Annual General Meeting**  
6<sup>th</sup> May 2014

# Agenda



- Macfarlane Packaging Market Position
- Changing Market Conditions
- Enhancing the Macfarlane Packaging Position
- Delivering Macfarlane Value

# Macfarlane Packaging – Market Position

- UK market leader in the distribution of protective packaging products
- c20% UK market share – almost 3 times the size of our nearest competitor
- Strong and growing position in key market sectors:
  - Third Party Logistics
  - Internet Retail
  - National Accounts
- National coverage, local responsiveness, depth of product range, strategic supplier base, experience and expertise

# Changing Market Conditions



- New market entrants and some existing competitors using price as their main differentiator.
- Customers are becoming more demanding both commercially and operationally.
- Customers focused on using packaging to protect the integrity of their brand particularly in internet retail.
- Business buyers are increasingly using online content to identify and validate their choice of suppliers

# Enhancing Macfarlane Packaging Position



**In order to strengthen our current UK leadership position we need to:**

- Build Macfarlane “Value” versus Competitor “Price”
- Invest in our sales team to deliver Macfarlane “Value”
- Embrace social media to improve communication

# Macfarlane Packaging Value



## Reduce our Customers' Total Cost of Packaging



# Delivering Macfarlane Value



Sales Skills



Sales Tools



Marketing Communication

# Sales Team Skills



Training to  
build Sales  
Techniques

Training to  
grow  
Product  
Knowledge

Training to  
develop  
Application  
Skills



# Sales Tools



**Connectivity**



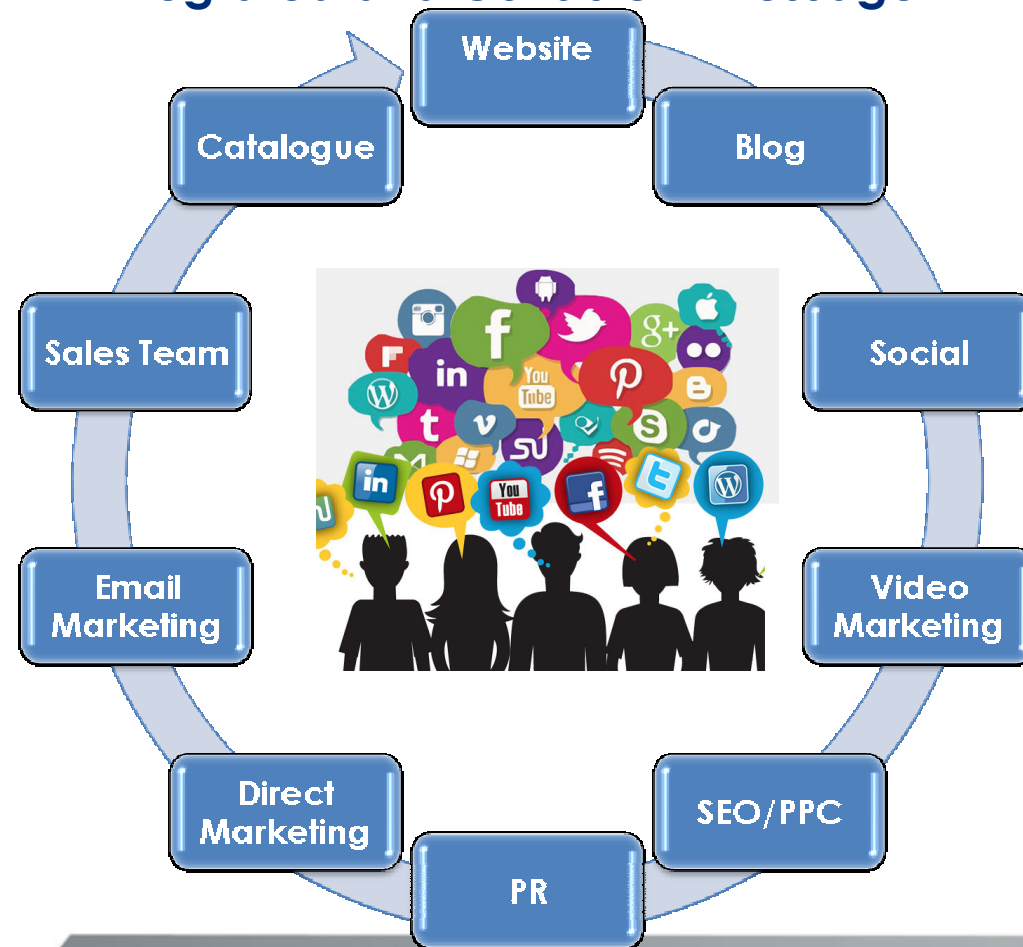
**Customer Relationship  
Management**



**Networking**

# Communication Plan

## Integrated and Consistent Message



# Reasons to Believe



**SELFRIDGES & CO**

**feelunique.com**  
The Destination for Beauty...

**ASOS**  
discover fashion online

**thehut**  
group

A blue 3D tag icon with a white string, positioned to the right of the "thehut group" text.

 **LAKELAND**

**SCREWFIX**

# Summary



- Macfarlane Packaging has a strong leadership position in the UK protective packaging market.
- We are focused on building this position and differentiating ourselves from the competition through demonstrating we can more effectively meet the current and future value needs of customers.
- Improved skills, new sales tools and enhanced communication will be key to our success.
- Macfarlane Packaging will show sustainable growth through retaining and developing existing customers, winning new customers and executing value enhancing acquisitions.