

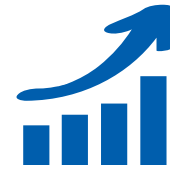
TOPPAN SPECIALITY FILMS (TSF)

An Introduction | はじめに | Jul'2024



TOPPAN Group Overview

The largest printing company in the world



\$13.7B
Net Sales



236
Group
companies



150
Factory w/w



54,336
employee



\$242M
R&D
expenses



1900
Founded In
JAPAN

(As of March 2023, 1USD=120JPY)

Business Segment

Company Overview



Global Packaging Business

Expanding the global network

Footprint:

2017

- TOPPAN Speciality Films**
Film Production : 80,000t/y
- PLASINDO LESTARI**
Flexible Packaging : 550million M2/y

2021

- Interflex Group**
Flexible Packaging:
UK 340million M2/y
US 360million M2/y

2022

- Majend Makcs**
Flexible Packaging : 80million M2/y

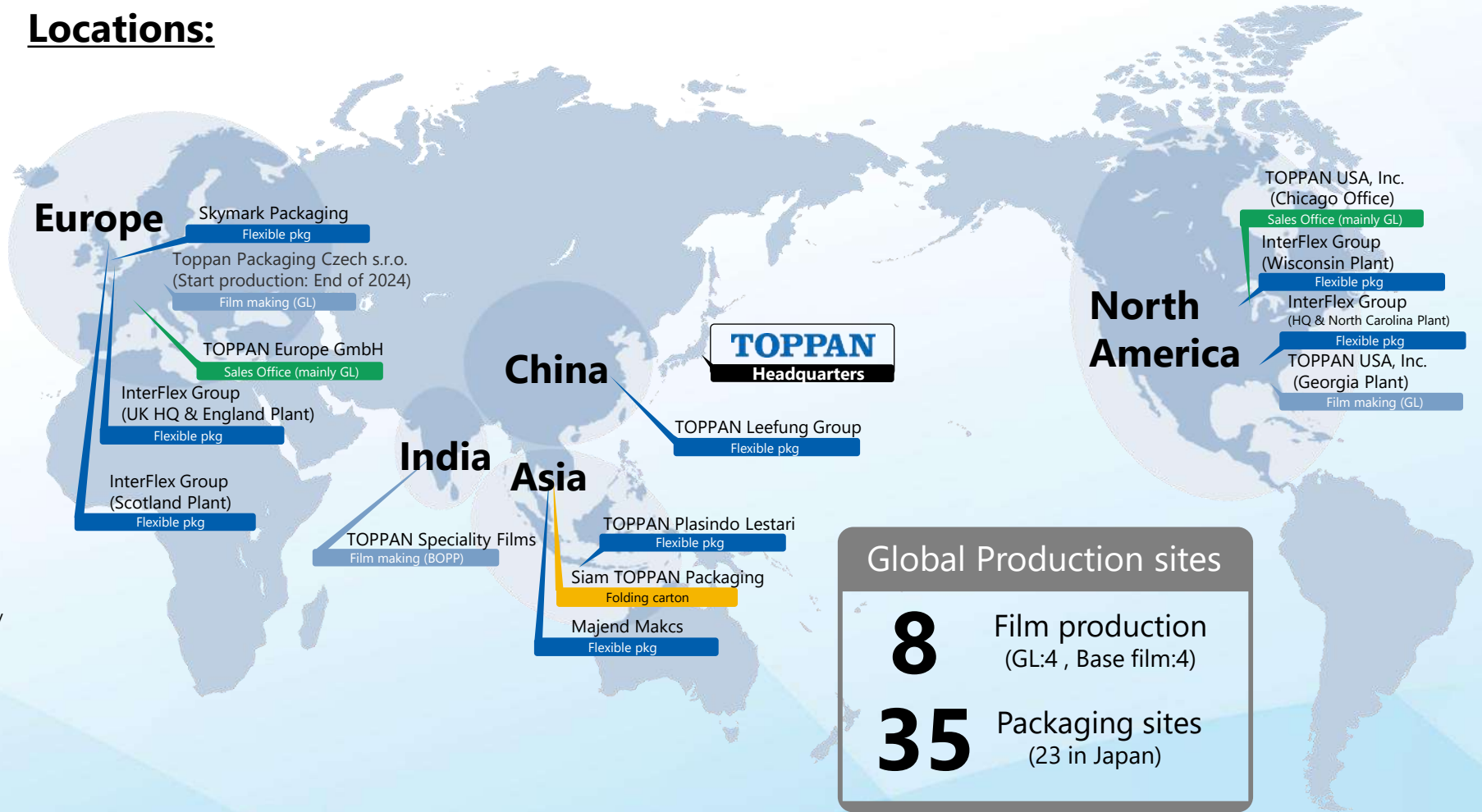
2023

- Skymark Packaging**
Flexible Packaging : 230million M2/y
Film production : 10,000t/y

2024

- Toppan Packaging Czech s.r.o.**
4th GL BARRIER Production site

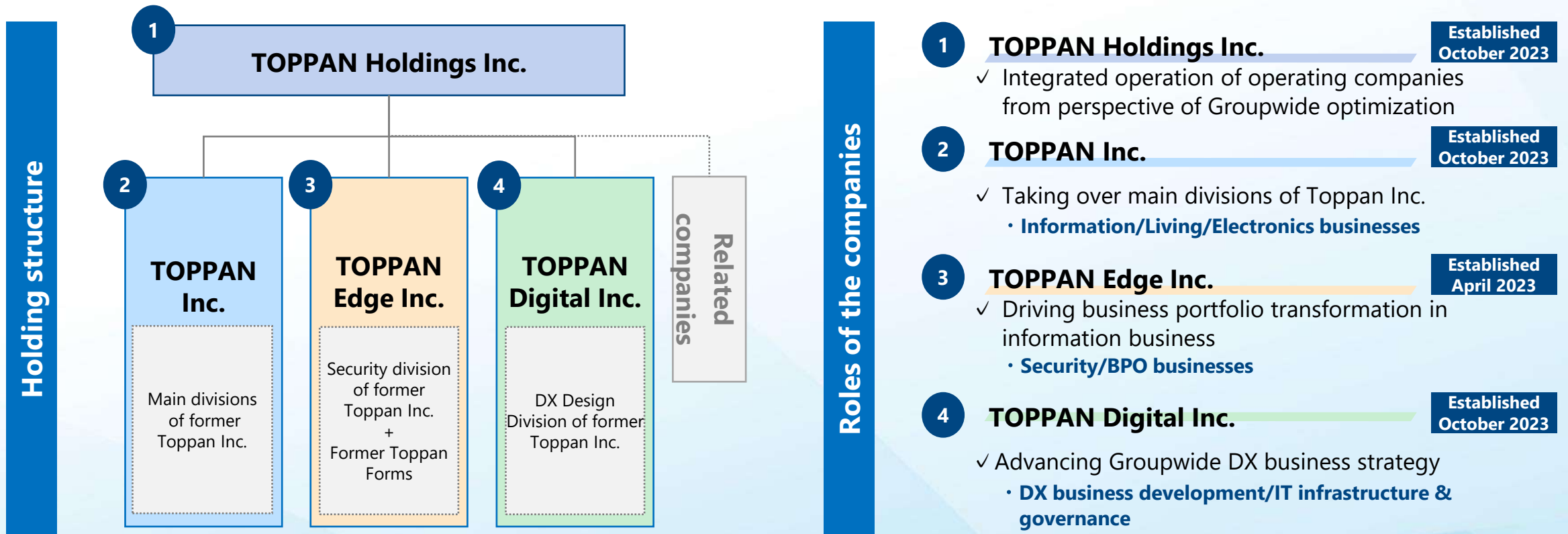
Locations:



TOPPAN: A company with global presence

TSF (Toppan Speciality Films Private Limited) is a subsidiary of **Toppan Inc.**

TSF was formerly - Max Speciality Films (MSF)



Corporate History : Toppan started in 1900, founded by engineers from Finance Ministry printing bureau.

- Co-sponsors of Tokyo 2020 Olympics
- Gifted a Printing Museum in Tokyo to Japanese people

Toppan Inc. holds global leadership in transparent High Barrier Films (GL films)

TSF: PVMV (PURPOSE | VISION | MISSION | VALUES)

PURPOSE



- Provide viable and innovative sustainable packaging solutions | 実行可能で革新的な持続可能な包装ソリューションを提供する
- Minimize environmental impact | 環境への影響を最小限に抑える

VISION



- To be the most admired and preferred global supplier of speciality polymer films
- 特殊ポリマーフィルムで最も賞賛され、選ばれる世界的なサプライヤーとなること

TOPPAN SPECIALITY FILMS

MISSION



- Grow through Technological innovation, Product differentiation, Quality leadership & partnerships with stakeholder | 技術革新、製品の差別化、品質のリーダーシップ、ステークホルダーとのパートナーシップを通じて成長する
- Operational & Service excellence to enhance customer experience | 顧客エクスペリエンスを向上させる優れた運用とサービス
- Deliver sustainable profitability & ROCE | 持続可能な収益性とROCEを実現する
- Nurture and engage talent to enable their productivity | 人材を育成し、雇用して生産性を向上させる

VALUES



- Fair and transparent business practices | 公正かつ透明な取引慣行
- Mutual respect and teamwork | 相互尊重とチームワーク
- Care for environment and community | 環境とコミュニティへの配慮
- Safety First | 安全第一

TSF: Milestones since inception

Regular expansions & forays into pioneer technologies was done to meet customer needs

顧客のニーズを満たすために、パイオニア技術への定期的な拡張と進出が行われました



4 BOPP Lines



6 Metallizers



3 Thermal Lines



1 CPP Line



2 Coating Line



DSIR approved |
NABL accredited
QA and R&D labs



1 Masterbatch



1 recycling unit

- 1990: BOPP
- 1996: Metallizer
- 1998: Coating
- 2001: Thermal
- 2003 & 2006 : Metallizer expansions
- 2007: BOPP expansion
- 2007 & 2009: Thermal expansions
- 2009: Coating expansion

1990 - 2010

- 2011: BOPP Expansions
- 2011: Metallizer Expansion
- 2016: Thermal Expansion
- 2017: Coating Expansion
- Innovation / R&D Lab
- 2017: Toppan as strategic partner @49%
- Obsolete Coating/ BOPP assets sold off
- 2018 : BOPP Expansion – Innovative line designed for sustainability journey

2011 -2020

- 2021 & 2022 : Metallizer Expansions
- 2022: Recycling unit entry
- 2022: Masterbatch entry
- 2022: CPP entry
- 2023: Coating expansion

2023: Renamed TSF |
Toppan @ 100% & Ordered

- **2025: BOPP/ BOPE L6**
- **2025: CPP 2**
- **2025 & 2026: Metallizer 7 | 8 | 9**
- **2027: BOPP L7 @ New Location**

Several other plans under approval *

2021 -2030*

PRODUCT SEGMENTS

PACKAGING FILMS

RANGE

Speciality Mostly BOPP+CPP based

ATTRIBUTES

Barrier Technology
Sealing Reliability
Recyclability focus
Overwrap

APPLICATIONS

**Food,
Pharmaceutical**



LABEL FILMS

**Pressure Sensitive
In Mould Label
Wrap around**

Coated Products
Orange Peel
High speed films

**Beverage/ wines
Milk & Dairy
Juice Bottles
Automotive**



GRAPHIC LAMINATION FILMS

**Elite – Premium
Classic- Standard**

Multiple special finishes
Extra Strong Bonds
Improved Optics

**Print finish &
Luxury Packaging**



Global Footprint- Covering 45 countries across the globe.

... growing bigger with each passing year.

India(70%)
Strong tie up with
customers



Exports (30%)
Convertors-60% |
Distributors-40%



Certifications



Quality management system
ISO: 9001:2015



Environmental management system
ISO: 14001:2015



OHS management system
OHSAS: 45001:2018



ISO 50001 Energy Management system



ISO 27001: 2022 Information security Management system



BRC Issue :6 "A + Grade" Global standard for food and packaging



ISCC PLUS Sustainability, Circular economy



National Accreditation Board for Testing and Calibration Laboratories



Labour standards, Health & safety, Business ethics, Environment



GMP and Hazard analysis and critical control points system



Eco Vadis Gold medal

Differentiators for TSF: “Speciality Mindset” 専門的な考え方

TSF success levers – which allow us to deliver value to customers continuously

TSF の成功の秘訣 – これにより、顧客に価値を継続的に提供できるようになります

Technical Know-how

- **Recipe & Process** レシピとプロセス
- Best R&D@ India
- **Production Expertise** 生産の専門知識
(USP in metallized solutions)

Brand/ converter relationships

- Wide product range | 幅広い製品範囲
- Support @Innovation
@イノベーションをサポート
- 3 decade+ relationships 30年以上の関係
- **Optimal cost | World class quality | Contractual | Ethical** 最適なコスト | 世界クラスの品質 | 契約上の | 倫理的

People & value system

- **Fair & transparent** 公正かつ透明
- Professional & loyal people
- Supplier engagements – best@India
- **GPTW: Engaged employees** – work hard, fear less – open door

1

2

3

4

5

Quality & process controls

品質とプロセスの管理

- **Web inspections**- BOPP & slitter
- Leaders in Innovation/ **Continuous improvement culture** (継続的な改善文化)
best in India

Assets & focus 資産と焦点

- **Best in class asset** (クラス最高の資産)- Alox & Alubond metallizer | In Line coater | UHB CPP asset
- **Product development** (invest ahead of time)
製品開発 (事前投資) – 1st in Biodegradable | BOPE

TSF Strategies : Plastics and plastics waste



- Thin gauging from 18 Mic to 12 Mic
- 3ply to 2 Ply
- Monolayer

Replacement solutions: Mono family:

- a) PET with HR, HROB
- b) Met PET with UHB films
- c) Al foil with UHB films
- d) Alox PET with Alox BOPP
- e) Nylon with BOPE

Mono material solutions as

- a) BOPE/BOPE
- b) BOPP/PP

CSR is integral to TSF & driven by employee enthusiasm

EDUCATION



- Sponsoring teacher's salaries and school infra projects
- Setting up STEM labs and libraries in government schools
- Strengthening teacher training and capability
- Providing apprenticeship to youth of nearby areas



CULTURE



- Partnering with NGO to run award-winning online cultural education program in 120 government schools in Punjab
- Sponsoring Cultural fests by cultural societies
- Cultural Performances on TSF annual day by specially abled children



COMMUNITY



- Sponsoring healthcare infrastructure upgrade and testing machines at government hospitals
- Infrastructure upgrade in 8 rural community projects
- Organizing/sponsoring Blood Donation Camps
- Youth Employability Enhancement through apprenticeship scheme



ENVIRONMENT



- Multiple Miyawaki mini forests planted to bring back native species of plants & trees
- Plantation drive to encourage environmental conservation on World Environment Day
- Setting up solar lights infrastructure in educational institutes, villages and slum areas
- MoU with IIT Ropar to study sustainability initiatives



Awards YTD FY 24

Total Awards – 17 | Quality- 6 | R&D- 8 | HR- 2 | Finance- 1

Organizer- SIES SOP STAR AWARDS
Category- Pkg Materials & Components



Next generation coated BOPP Label Film for high speed UV flexo printing machine- 2022

02

Organizer-GPTW
Category- Mid-size workplace



Ranked 27th among India's Mid-Size Workplaces in 2023

04

Organizer- GPTW
Category- Best Workplace



Top 50 Mid-size India's Best Workplaces for Millennials 2023

06

Organizer- CII IQ,TPM club India
Category- Quality Improvement



Won silver award in 18th CII circle competition

08

01



Next Generation Transparent Ultra High Barrier BOPP for Sustainable Packaging- 2022

Organizer- IFCA
Category- Innovation & Creativity

03



Transparent Ultra High Barrier BOPP Film for Conversion Applications-2022

Organizer- INDIA STAR AWARD
Category- Pkg Material & Component

05



18th National Awards for Excellence in Cost Management-2022

Organizer- ICAI
Category- Manufacturing

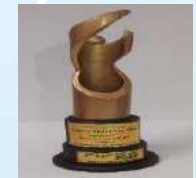
07



Won Gold award in 46th CII National Kai-Zen Competition

Organizer- CII IQ,TPM club India
Category- Renovative

09



FIPSA 2022 for the product of Biodegradable BOPP film.

Organizer-FIPSA
Category- Responsible Packaging

Awards YTD FY 24

Total Awards – 17 | Quality- 6 | R&D- 8 | HR- 2 | Finance- 1

Organizer- CII IQ,TPM club India
Category- Quality Improvement



Jury Challenger Award in
CII Challenger's trophy

10



Gold Award in 47th CII
National Kaizen Competition

Organizer- CII IQ,TPM club India
Category- Quality Improvement

Organizer-IFCA
Category- Responsible Packaging



FIPSA 2022 for the product-
Adhesive free BOPP IML for
medium to large container

14



FIPSA 2022 for the product-
Phthalates free BOPP Films for
Chocolate wrappers

Organizer-IFCA
Category- Responsible Packaging

Organizer-RBNQA
Category- Environment Focus



IMC RBNQA Best Practices
Award

16



12th International Annual
Conference on Quality
Management

Organizer- ASQ
Category- Quality

Organizer- SIES SOP STAR AWARDS
Category- Pkg Materials & Components



High Hot-Tack & High Seal
Strength Met Bopp Specifically
Designed for High-Speed
Confectioneries Packaging

18



Next generation coated
BOPP Label for high-
speed UV flexo printing
machine

Organizer- WORLD STAR AWARD
Category- Packaging Materials and Components

Awards YTD FY 25

Total Awards – 04 | R&D- 2 | HR- 2

Organizer- INSSAN

Category- Technical Paper



Par-Excellence award in
25th All India Creativity
Summit

01



Excellence award in 25th All
India Creativity Summit

Organizer- INSSAN

Category- Technical Paper

02



High Hot-Tack & High Seal
Strength Met Bopp Specifically
Designed for High-Speed
Confectioneries Packaging

Organizer-IFCA

Category- Responsible Packaging

03

Personnel and Labor Affairs Division TOPPAN President's Commendation Award Ceremony

Congratulations on receiving the TOPPAN President's Commendation.

We would also like to express our sincere gratitude to you for taking time out of your busy schedules to attend the award ceremony in person. The award ceremony will be announced as follows.

1. Date & Time: Friday, June 21, 2024 17:15~18:00

2. Meeting time and place

Please gather at Conference Room A, B, and C on the 12th floor by 16:45 (punctuality).

3. Venue: **TOPPAN Koishikawa Building (1-3-3 Suido, Bunkyo-ku, Tokyo)**

Award Ceremony: Conference Room A, B, C, 12th floor

- ① JR 総武線東口、東京メトロ 東西線・南北線・有楽町線、地下鉄大江戸線「飯田橋」駅 B1 出口 徒歩 12 分
- ② 東京メトロ 有楽町線「江戸川橋」駅 4 番出口 徒歩 10 分
- ③ 東京メトロ 丸ノ内線、南北線「後楽園」駅 1 番出口 徒歩約 10 分



4. Officers in attendance: President Saito, Vice President Sakai, Vice President Okubo, Senior Vice President Ueki, Senior Managing Director Noguchi, Managing Director Itoya

5. Next Award Ceremony 17:15 ~ 17:45

Commemorative photo 17:45 ~ 18:00

A world map is centered on the page, rendered in a light blue and grey color scheme. Overlaid on the map is a complex, golden network of thin lines that connect various points across the globe, resembling a global communication or data network. The background is a dark, textured surface with a subtle gradient from dark blue to black.

THANK YOU

Expect best Technology, Quality & Service