Care business area: Emerging business, opportunities for significant growth

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Care business – from cradle to grave

- Baby diapers
- Traditional wound care
- Transdermal patches
- Feminine hygiene
- Prep pads
- Drape ancillary products
- Cast padding
- Adult incontinence
Care business area in brief

**Roll goods** for a wide range of medical and hygiene products

**Customers** include both manufacturers of medical devices and global consumer brands

**Net sales** Q3/2014: 8.9 M€

**Suominen competitive edge:**
- Global footprint
- Expansive specialty spunlaced platforms
- Unique thermal bond and cotton nonwoven process
- Excellent market reputation
Adding value for Care customers

• Care nonwovens form a **component** in the end product.
• Nonwovens used in hygiene and medical applications require **technical and market application know how**.
• Medical disposable products offer uncompromising quality, comfort, barrier, absorbency and resistance to contamination
  • Suominen’s **spunlace technology** can meet all the product attributes required.
• Hygiene disposable products offer assurance, discretion, performance and mobility.
Markets: Medical
Demand for medical nonwovens is expected to grow globally

Global growth rate ~5%
Growth rate for Suominen markets ~4%

Spunmelt technology today some 70% of the total market.
Demand drivers in Medical & Suominen’s strategic actions

**TRENDS**
- Global health care spend
- Pandemics
- Cost effective high performing fabrics (HAI\(^1\))
- Reduced treatment time for patients

**SUOMINEN’S ACTIONS**
- Grow selectively with existing and new customers
- Expand our market position in traditional medical markets
- Innovate materials focused on new medical platforms

\(^1\) Hospital Acquired Infections

**MARKET GROWTH POTENTIAL**
- LOW
- MEDIUM
- HIGH
Markets: Hygiene
Demand for nonwovens for hygiene products is growing particularly in emerging markets.

Global growth rate ~5%
Growth rate for Suominen markets ~3%
Spunmelt technology today some 60% of the total market.
Demand drivers in Hygiene & Suominen’s strategic actions

**TRENDS**
- Demographics
- Disposable income data
- GDP growth
- Wealth distribution

**SUOMINEN’S ACTIONS**
- Leverage our global footprint and relationships to grow
- Keen focus on chosen hygiene applications

**Population by age group**
- Western Europe
- Northern America
- South America

**MARKET GROWTH POTENTIAL**
- Low
- Medium
- High

Suominen is a globally leading supplier of nonwovens for wiping, hygiene and medical applications.
Strategic choices
Strategic choices in Care

Create fabric structures with unique features offering competitive advantage

Leverage global and specialty spunlaced platforms

Reduce complexity for our customers
Key actions in Care business area in 2015-2017

- Expand customer relationships
- Execute on new product development
- Leverage global footprint
Summary of Care business

- Outlook for hygiene and medical markets favorable
- Global growth opportunities
- Expand customer base
- Leverage strategic convenience relationships
- Deliver quality products
- Execute on New Product Development initiatives

Suomenin is a globally leading supplier of nonwovens for wiping, hygiene and medical applications.
Thank you!