





# About Bunzl plc

## *What We Do*

### International Company

- 2009 sales - £4.6 billion
- Locations in 24 countries

### Head Office in London

- Australia HQ - Melbourne
- Listed on the London Stock Exchange
  - *Component of the FTSE 100*
  - *Support Services sector*

### Outsourcing Services

- Supply a broad range of non-food consumables to key market sectors in Australasia, Europe & North America





# Markets Bunzl Serves - 2009



Diversified by Customer Markets



# Packaging & Inventory Management

- More effective E-commerce management systems
- Slow moving packaging and obsolescence
- Maximize ROCE and minimize inventory
- Daily/Monthly reporting systems on inventory
- Frequent deliveries

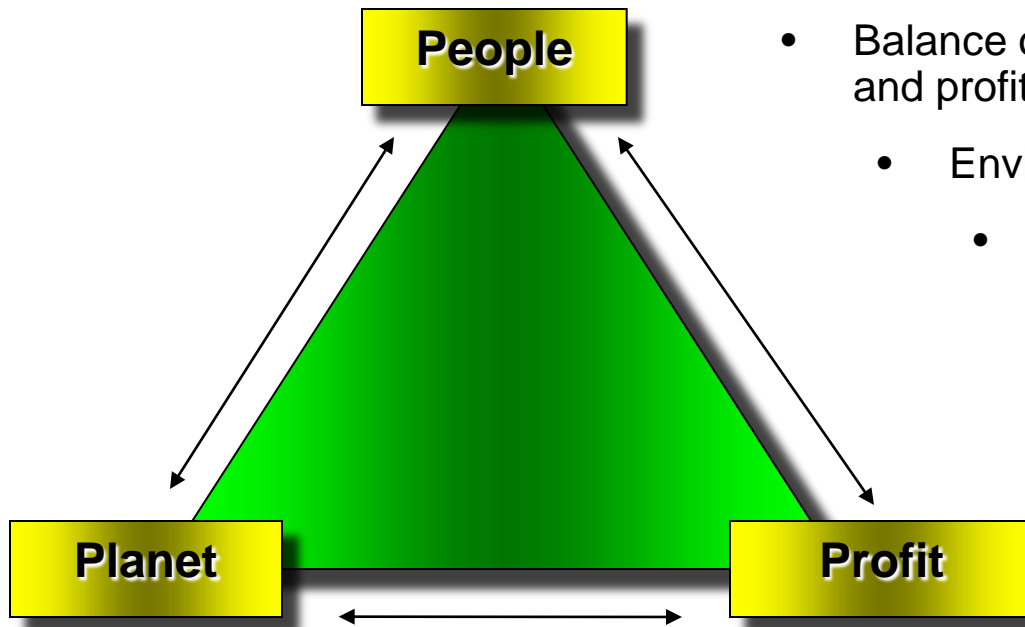


# Sustainability

“Sustainable development is the pattern of resource use that aims to meet human needs while preserving the environment so that these needs can be met not only in the present, but also for future generations...”

- Bruntland Commission

# Defining Sustainability



- Balance of triple-bottom line: people, planet and profit
  - Environmental, social & economical
    - Best way to manage risks and create business growth opportunities
    - Goes beyond products to the substance of enterprise

*“We do not inherit the earth from our ancestors. We borrow it from our children.”*

Meeting the needs of the present without compromising the ability of future generations to meet their own needs.



# What is in the Landfill?

Figure 5. Total MSW Generation (by material), 2008  
250 Million Tons (before recycling)

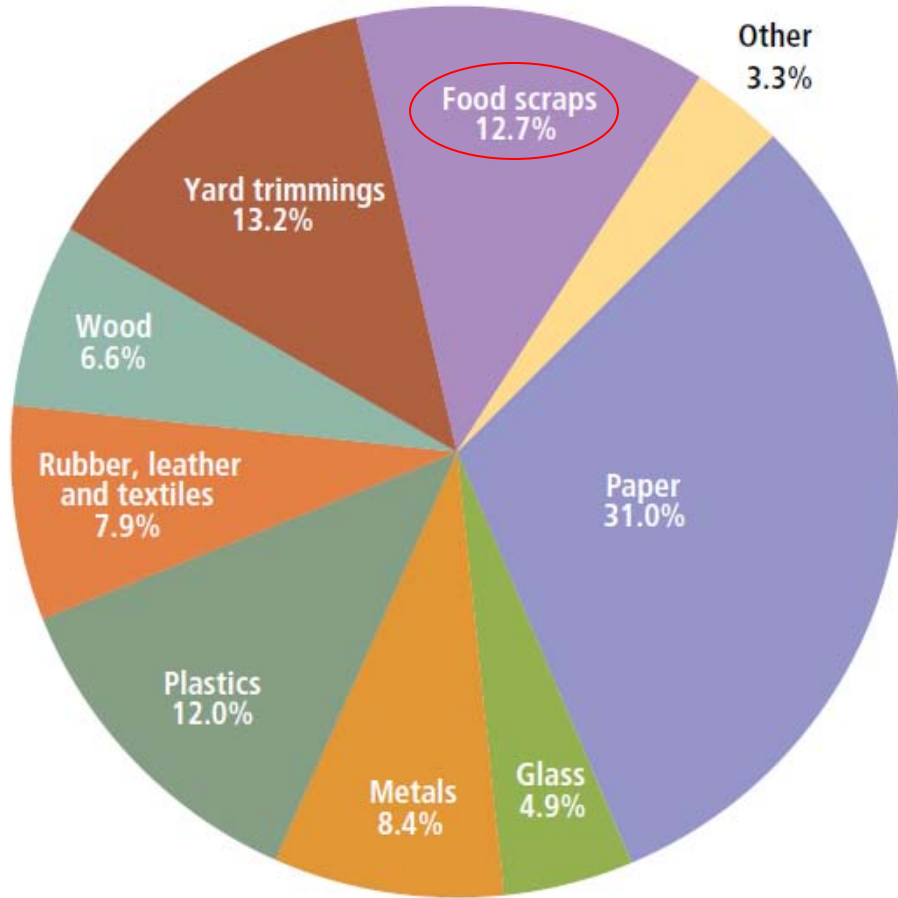
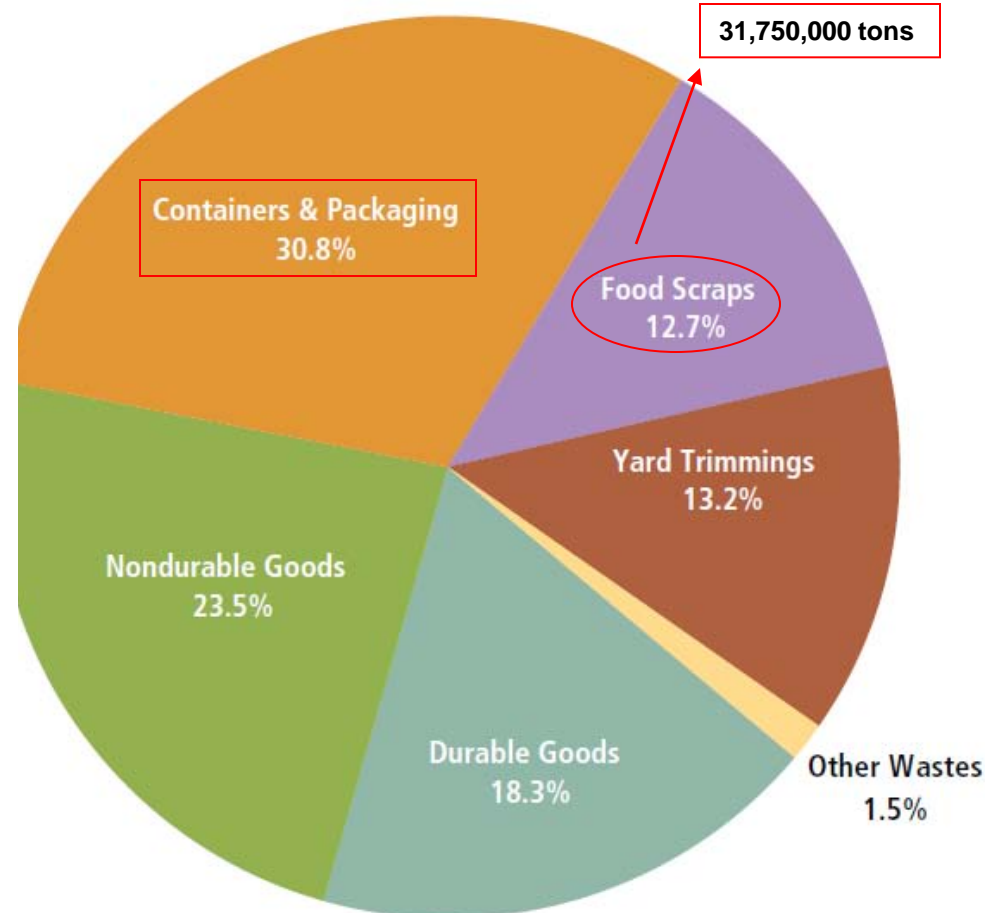


Figure 6. Total MSW Generation (by category), 2008  
250 million tons (before recycling)



# 2010 Sustainability Outlook

- A “green” product must be affordable to drive the necessary volume in order to make a significant environmental impact
- Start with simple steps first to build momentum on your journey of sustainability
- The sustainability movement has strengthened in the recession because companies realize that sustainable practices also reduce costs





# Are Packaging Fees Inevitable in the USA?

- Every other OEDC country **BESIDES** the USA impose fees that brand owners pay to dispose of product packaging
- New Era in Packaging - EPR (Extended Producer Responsibility) - Market participants choose materials carefully (*Victor Bell*)
- End of Life Options - because they would pay for disposal
- 34% will buy “environmentally responsible” products (*Lawrence Dull*)
- More than 50% of world population is aware of the term “carbon footprint” (*Lawrence Dull*)
- Wal-Mart’s goal is to reduce its global supply chain
  - 5% by 2013
  - Zero landfill waste by 2025
- US demand for green packaging approaching \$44B in 2013!
- Fastest gains anticipated for biodegradable plastic packaging



# Sustainability in Packaging & Merchandising

- Source reduction
- Can we merchandise more effectively while reducing “Over Packaging”?
- Rigid vs. Flexible packaging
- We must educate and promote our sustainability focus and package usage to the consumer



# Companies & Communities Working Together to Achieve Sustainability

- Coca Cola - SC Facility & PWP/Pactiv
- Wal-Mart - Supplier Sustainability Assessment - 15 questions for suppliers
- Natureworks
- Communities/Waste recycling companies need to recycle more food packaging (currently only PET, aluminum cans & glass bottles)



# Bunzl Initiatives: As a Green & Sustainability Citizen

- Expanding locations involved in recycling our internally generated plastic and corrugated items
- Improving fuel efficiency of trucks and trailers
  - Xata onboard computers installed on all power units
    - Review route efficiency
    - Monitor and manage fuel efficiency
- Upgrade our equipment (trucks, trailers, lift trucks, etc.) to replace older models with new suitable, cost-efficient units
- Analyzing our delivery costs to find optimum mix of Bunzl deliveries vs. LTL shipments
- Increasing RF technology in warehouse selecting & receiving functions - reduces paper and improves accuracy
- Bunzl's "Green" website
- All of the above are also good for our bottom line