Fabbrica Italiana Lapis ed Affini

CORPORATE PRESENTATION

JUNE 2017

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THE GROUP
WE PAINT THE FUTURE

With a portfolio of over 20 Love Brands and thousands of products available on all continents, F.I.L.A. Fabbrica Italiana Lapis ed Affini is a leading global player specialised in the research, design, manufacturing and sale of creative expression tools.

THE ITALIAN HISTORY OF A FAMILY-RUN BUSINESS

1920

F.I.L.A. Fabbrica Italiana Lapis ed Affini emerged from Florence and the vision of the noble Antinori and della Gherardesca families. It's symbol has always been the lily, which represents the city and the unbreakable link between art and history.

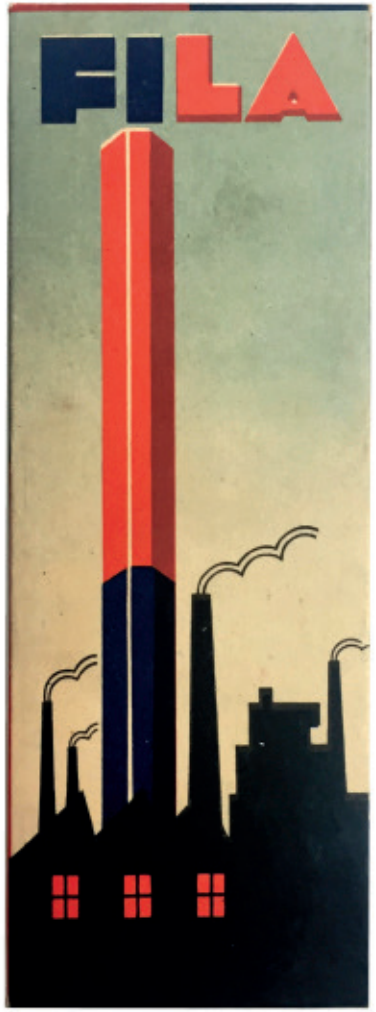
1923

The Giotto brand was created; a timeless icon of Italian drawing and colouring products, represented by the historic cartoon which depicts Giotto and his master Cimabue and makes the brand immediately recognisable.

THE ITALIAN HISTORY OF A FAMILY-RUN BUSINESS

1956

A group of employees, led by Renato Candela, took the reins and began to transform it into a solid national manufacturing entity. An entreprising and pioneering growth strategy based on technology, product and creative tool innovation led F.I.L.A. to progressively win market leadership.



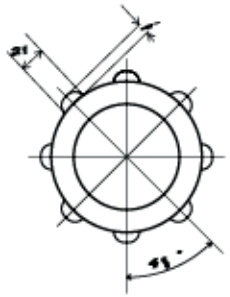
1964

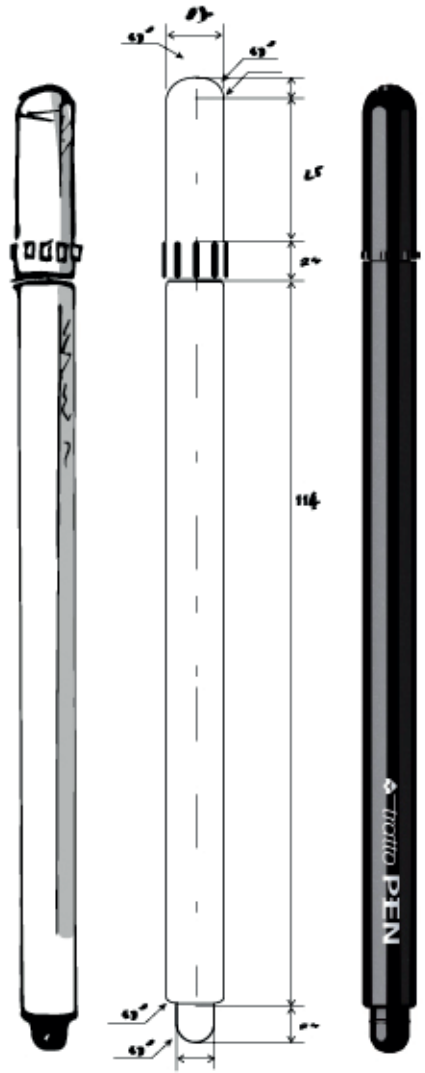
Alberto Candela succeeded his father Renato and, under his guidance, the company set out on a path focused on new products, images and style. Giotto Fibra was created, a forerunner of the coloured felt-tip pens and the Tiziano line, dedicated to artists was created.

THE ITALIAN HISTORY OF A FAMILY-RUN BUSINESS

1973

In 1973 the Tratto-Pen was created - the "writing felt-tip pen" - and was met with immediate success and presented in 1979 the prestigious Compasso d'Oro Award, which also led to a place at the MOMA in New York.





1994

Massimo Candela, son of Alberto, became Chief Executive Officer. Under his leadership, the Group focused on international expansion, through a new policy of strategic acquisition and continual organic growth, which also saw the opening of distribution branches in strategic countries for the Group.

SINCE 1994: ACQUISITIONS AND INTERNATIONAL EXPANSION

1994	2000	2005	2008	2010	2012	2014	2016
PONGO	Omyacolor	DIXON	LYRA Germany	Lapimex	DOMS LICYN	MAIMERI	CANSON / St Cuthberts Mill / DALER ROWNEY
Adica Pongo (Italy)	**Omyacolor** (France)	**Dixon** (USA, Canada and Mexico)	**Lyra** (Germany)	**Lapimex** (Mexico)	**WFPL-DOMS*** (India) **LICYN** (Brazil)	**Maimeri** (Italy)	**Daler Rowney** (UK) **St. Cuthberts** (UK) **Canson** (France)

*18,5% in 2012 – 51% reached in 2015

We feed the creative expression

F.I.L.A. GROUP – TODAY

The F.I.L.A. Group today produces and manufactures tools and supports for design, colouring, painting and modelling, giving an outlet to the creative expression of children, young persons and adults.

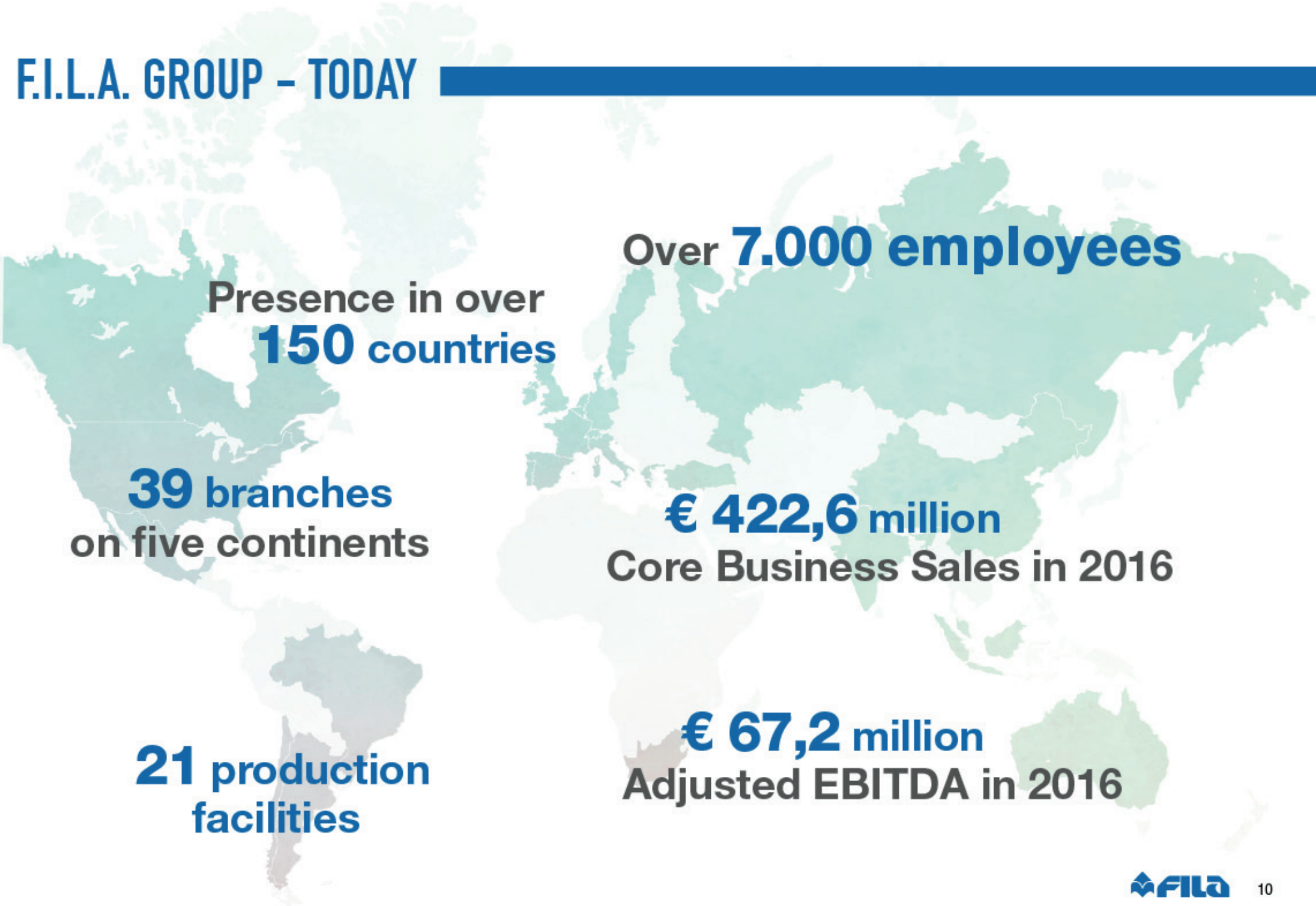
20 iconic brands and a complete and original product portfolio.

2 business units: School-Office and Fine Art & Craft.

Highly experienced managerial team proven by over fifteen years of stability and excellence in corporate governance.

Listed on the STAR segment of the Italian Stock Exchange since November 2015.

F.I.L.A. GROUP – TODAY



Over **7.000 employees**

Presence in over
150 countries

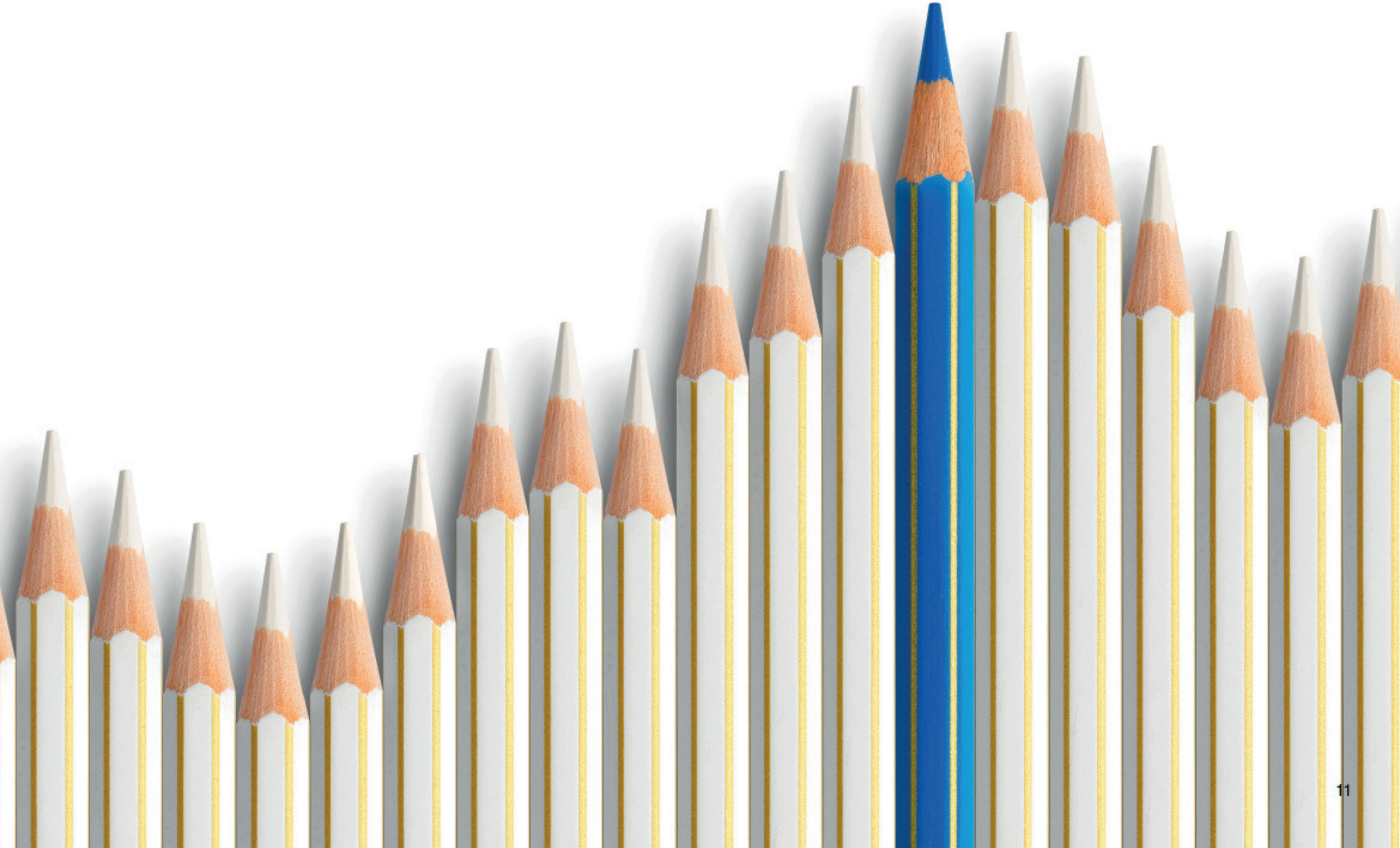
39 branches
on five continents

€ 422,6 million
Core Business Sales in 2016

21 production facilities

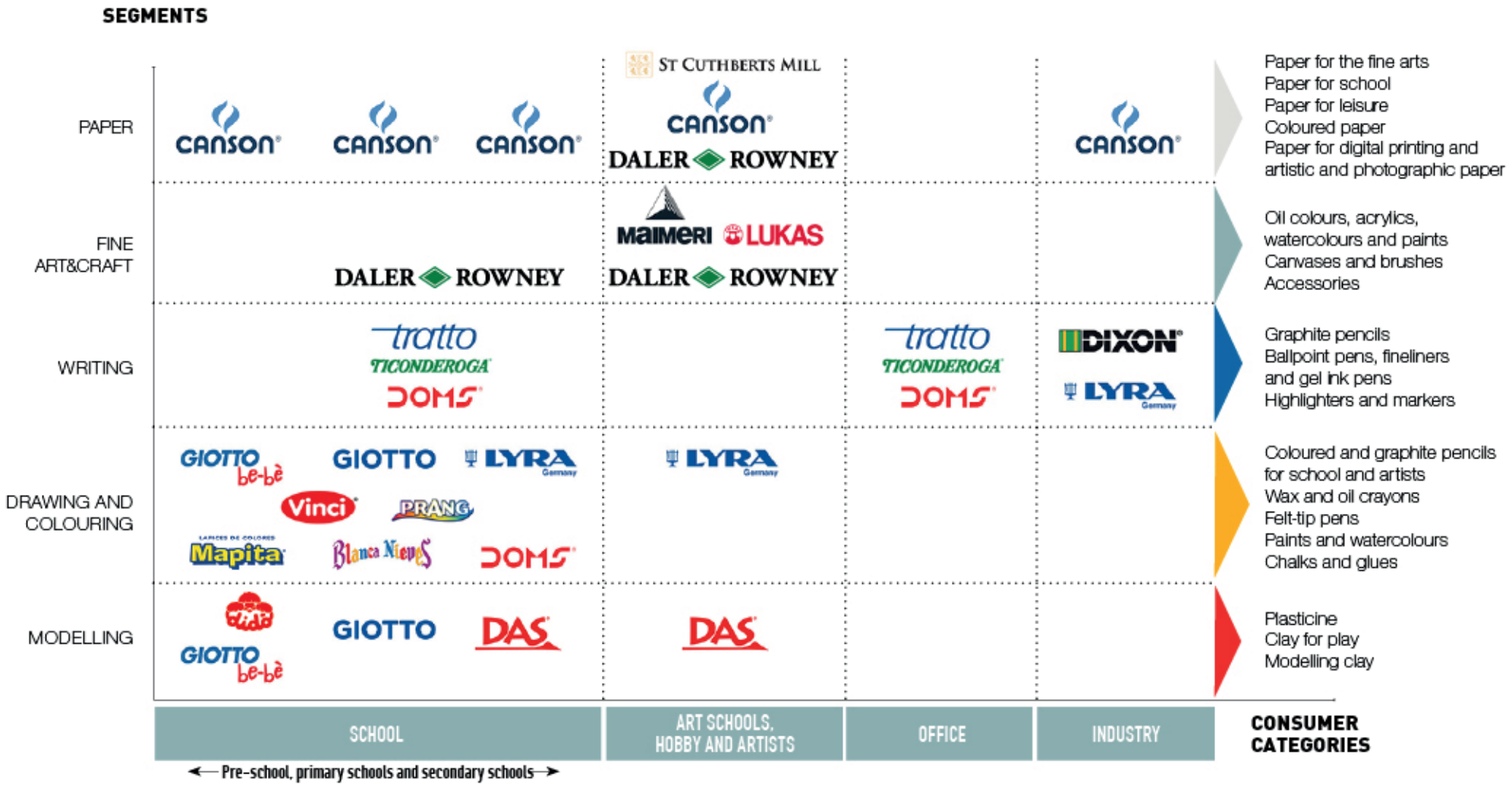
€ 67,2 million
Adjusted EBITDA in 2016

A RECOGNISED LEADER



A RECOGNISED LEADER

MAIN GROUP BRANDS AND SEGMENTS



Source: Company data.
Brand details at attachment at page 46.

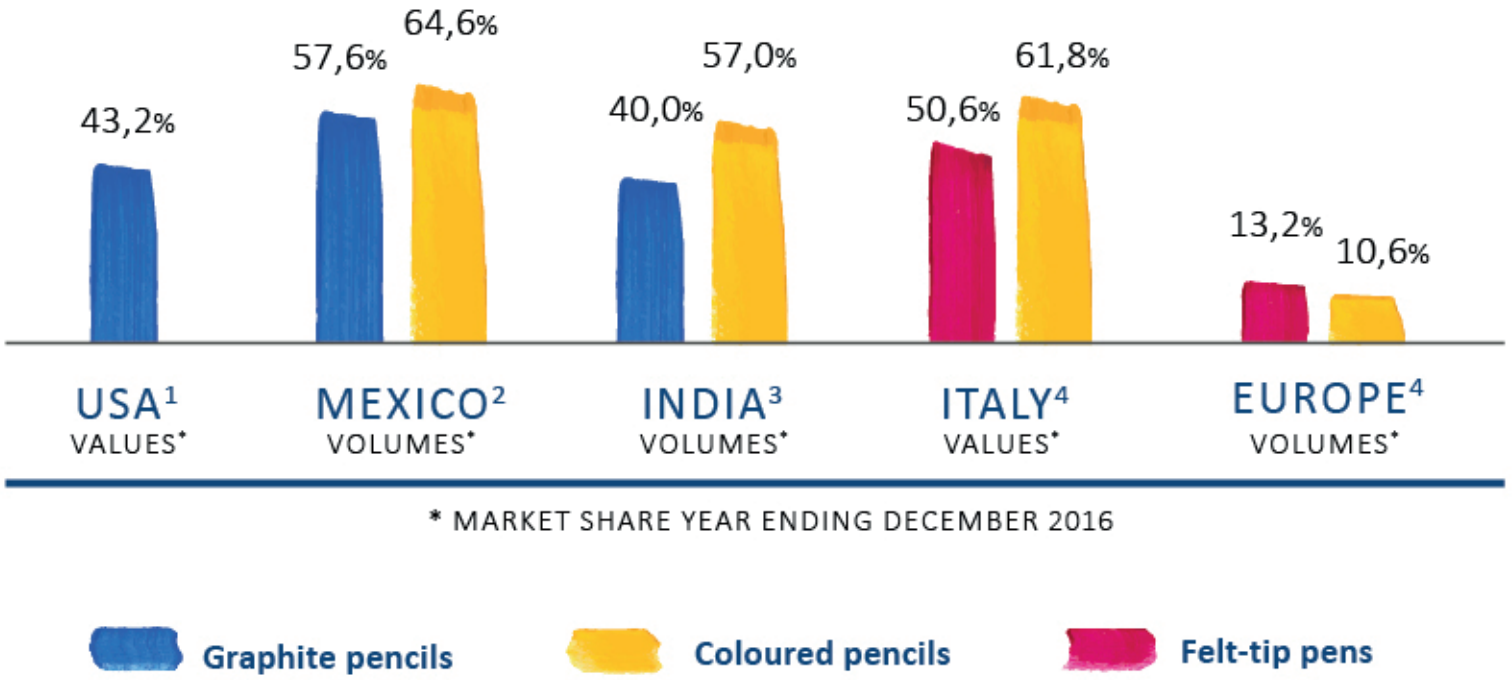
F.I.L.A. SEGMENTS AND MARKET SHARE
TRADE MARKET

SEGMENTS

¹ F.I.L.A. Management estimates
² Includes: colours, canvases, brushes, fine arts pencils and accessories

F.I.L.A. SEGMENTS AND MARKET SHARE
CONSUMER MARKET

MARKET SHARE



Sources:
[1] NPD Group
[2] ISCAM (Información Sistematizada de Canales y Mercados)
[3] Data refers to F.I.L.A.'s affiliate company Writefine Products Private Plc
[4] Gfk Retail and Technology - Italy, France, Germany, Spain, Portugal, Netherlands, Greece, Poland and Rumania

MANAGEMENT TEAM

COUNTRY	NAME AND SURNAME	POSITION
ITALY	MASSIMO CANDELA	CEO F.I.L.A. GROUP
ITALY	LUCA PELOSIN	INT'L OPERATIONS & HR OFFICER F.I.L.A. GROUP
ITALY	STEFANO DE ROSA	INT'L FINANCE AND CORP. AFFAIRS OFFICER F.I.L.A. GROUP
ITALY	GIANNI MAIMERI	CEO INDUSTRIA MAIMERI
FRANCE	ERIC BUÉE	CEO LYRA GERMANY & COMMERCIAL DIRECTOR FOR FRANCE-GERMANY-BENELUX
MEXICO	DIEGO CESPEDES	CEO MEXICO
UK	DOMINIQUE PARADIS	CEO UK
CHINA	WULANG ZHONG	GENERAL MANAGER CHINA
INDIA	SANTOSH RAVESHIA	CEO INDIA

THE F.I.L.A. WORLD

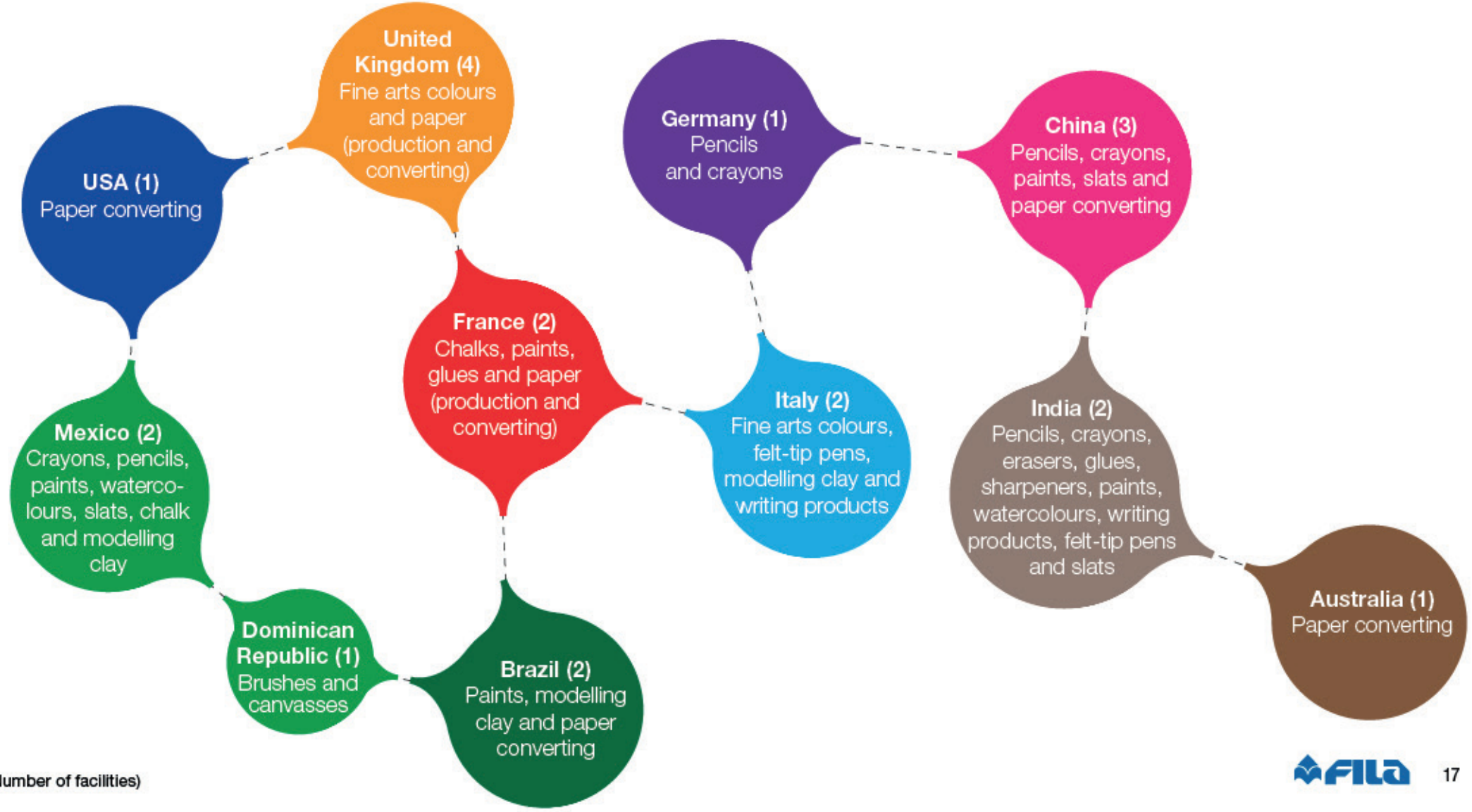
Between 2005* and today F.I.L.A. has multiplied its global penetration: the distribution network has expanded from 3 to 39 Branches - today it represents over 80% of revenues. The number of production facilities - thanks to acquisitions - has risen from 6 to 21, allowing F.I.L.A. to now produce nearly all of its product portfolio at its own facilities.

*Dixon not included

"MADE IN F.I.L.A." PRODUCTION

ANNUAL PRODUCTION

~2,5bn pencils | >600mln chalks | ~500mln markers | ~4,0mln litres of paint | 14,000 tonnes of paper

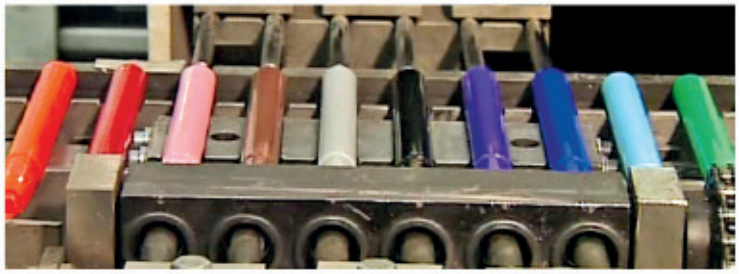


(Number of facilities)

“MADE IN F.I.L.A.” PRODUCTION

- Plantation in China (~250k trees), operational beginning 2018.
- Direct access to production resources and in particular wood, which represents over 20% of raw material costs: F.I.L.A. is one of only two players globally creating finished products beginning with tree trunks.
- Vertically integrated production platform, direct quality control and ongoing cost control.

“MADE IN F.I.L.A.” PRODUCTION



- Dedicated research and development teams at the main production sites to guarantee continued product and related production process development.
- Printing and blowing of plastic materials at the facilities: in Italy, Mexico, France and India.
- Increasingly interchangeable facilities to diversify risk. Standardised production process, packaging diversification by country and differing regulations.

GROWTH STRATEGY

In a sector featuring increasing concentration, a contained number of specialised global players and strong brand loyalty, market leadership will be won by those who can control the entire chain, overcome the high barriers to entry (brand awareness, production, safety quality standards, etc...) and who have the creativity to innovate in mature markets and brands that are capable of penetrating the emerging markets.

F.I.L.A.'s future growth strategy focuses on combining **organic growth** with targeted **acquisitions**.

LONG-TERM GROWTH STRATEGY
ORGANIC GROWTH

Development of high potential market presence through:

Opening of branches to obtain distribution control.

Oversight of the market.

Closeness to the end customer.

Solid, healthy and sustainable growth over time.

Consolidation of presence in existing markets through:

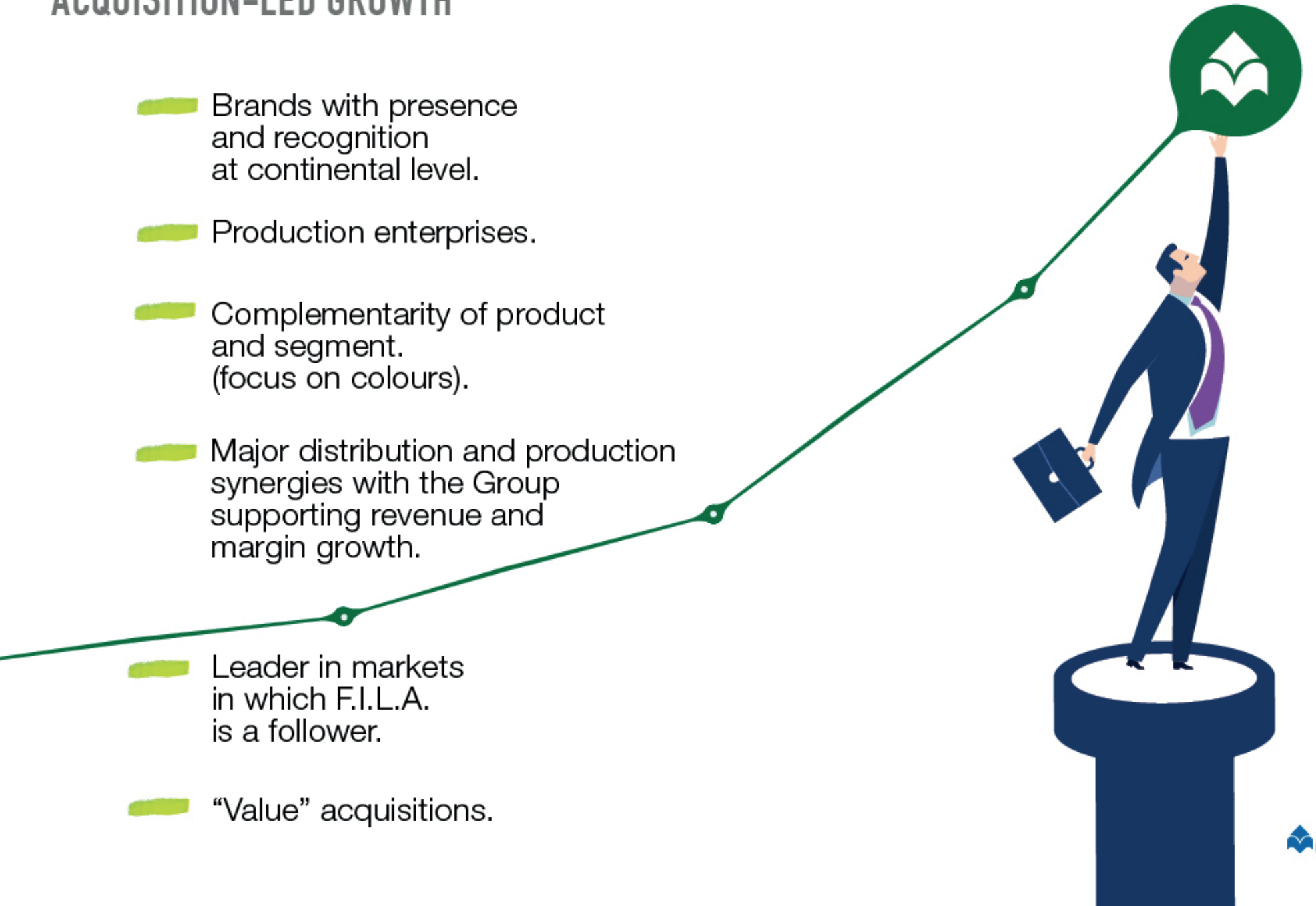
Brand building.

Increase of numerical and weighted distribution.

LONG-TERM GROWTH STRATEGY

ACQUISITION-LED GROWTH

- Brands with presence and recognition at continental level.
- Production enterprises.
- Complementarity of product and segment. (focus on colours).
- Major distribution and production synergies with the Group supporting revenue and margin growth.
- Leader in markets in which F.I.L.A. is a follower.
- “Value” acquisitions.



A CLEAR PATH FOR FUTURE GROWTH

A CLEAR PATH FOR FUTURE GROWTH

PRODUCT

Identifying, conceiving and developing new product ideas, while understanding how to apply the consequent market strategies has always been in the F.I.L.A. Group's DNA.

A CLEAR PATH FOR FUTURE GROWTH
PRODUCT

- **Unique product range in terms of extent and depth**, satisfying the needs of various markets, both in terms of function and requirements met.

- **Integration of a value and volume business model** to respond to the specific needs of the two business units and their targets.

- **Quality - consistent pricing** independently from the market/brand (leader in quality/price ratio).

- **Marketing vision focused on the product**, bringing together the functional aspects (concrete performance) with the symbolic aspects (technical, brand, communication) in order to create increasing value for the consumer, independently of the group category (value market for school, stationary and office - premium market for Fine Art).

A CLEAR PATH FOR FUTURE GROWTH
PRODUCT

	VALUE BUSINESS MODEL:	VOLUMES BUSINESS MODEL:
Demand:	Segmented and highly specialised.	High numbers of clients and consumers, often segmented into subgroups (School and Office).
Critical competitiveness and product offer factors:	Personalisation and quality, performance, innovation and differentiation.	Production cost control, economies of scale, price control, oversight of the channels and high quality level.
Level of differentiation:	High in product and brand image.	Extremely low for the product and the process, highly personalised in brand and packaging terms.
Level of market coverage:	Targeted and specialised.	High both in numeric and weighted terms.

A CLEAR PATH FOR FUTURE GROWTH
MARKETING AND COMMUNICATION

Contact with the customer is through application of all traditional marketing mix elements. In particular, F.I.L.A. focuses on:

A CLEAR PATH FOR FUTURE GROWTH
MARKETING AND COMMUNICATION

In a low spend advertising sector, brand construction requires the creation of a comprehensive relationship with the consumer, which evolves continuously in full respect of the tradition created by century-old brands.

The F.I.L.A. Group seeks ongoing and long-term relationships with its target consumers through brand building focused actions such as:

- **Loyalty programmes.** (Prang Power, Circulo Escolar Dixon, etc.)
- **Educational and training activities and use of specialised promoters in territories.**
- **Participation at the largest sector trade shows.** (Paperworld, ECRM Show, Photokina, etc.) and for the world of educators and teachers (Teachers Day and Didacta)
- **Awards and dedicated competitions.** (Giotto La Matita delle Idee Award, F.I.L.A. Maimeri Award, Concur Ecol Canson, Canson Art School, Giotto Eres Tu etc.)

A CLEAR PATH FOR FUTURE GROWTH
MARKETING AND COMMUNICATION

Building of community (on/off line) dedicated to the creative expression world and the sharing of experiences.
(art forums and blogs)

Sponsorship of play - creative activities dedicated to children, parents and teachers. (Children's Museums, Creativity Festivals, Art and Design shows, Illustration and Comic Festivals etc.)

Charity and support of projects dedicated to children.
(Dixon and Kids in Need Foudation, F.I.L.A. and Save The Children, F.I.L.A. and Umberto Veronesi Foundation, etc)

Patronage and sponsorship in support of the arts and the "creation of beauty". (Canson partner of Louvre, Maimeri Foundation in support of emerging talents, the Venice Biennale, the Milan Design Triennale, etc)

A CLEAR PATH FOR FUTURE GROWTH

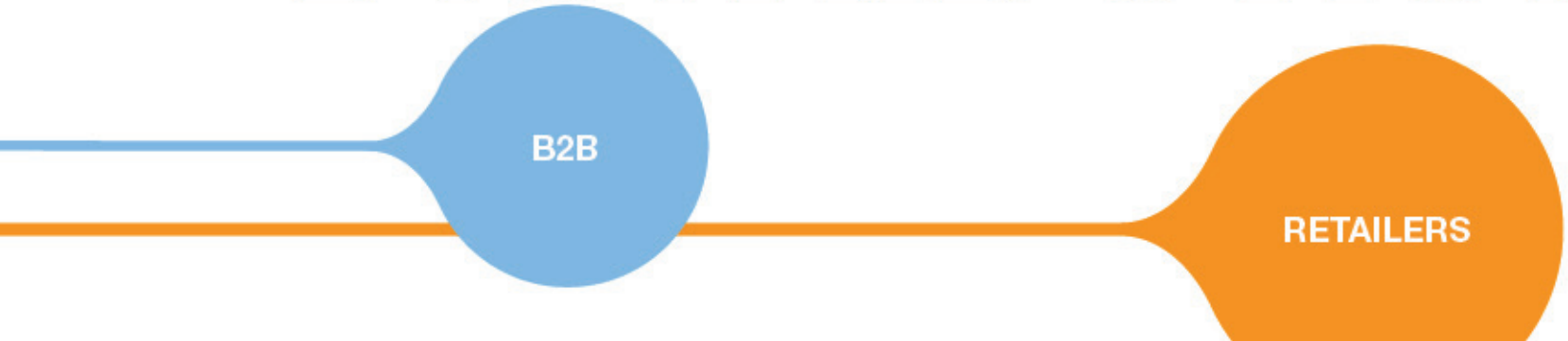
DISTRIBUTION

F.I.L.A. considers distribution a critical success factor focusing on:

- Large scale distribution for value products - school and office.
- Targeted and specialised distribution for premium products - Fine Art & Craft.

Synergies from modernisation and the concentration of the distribution system.

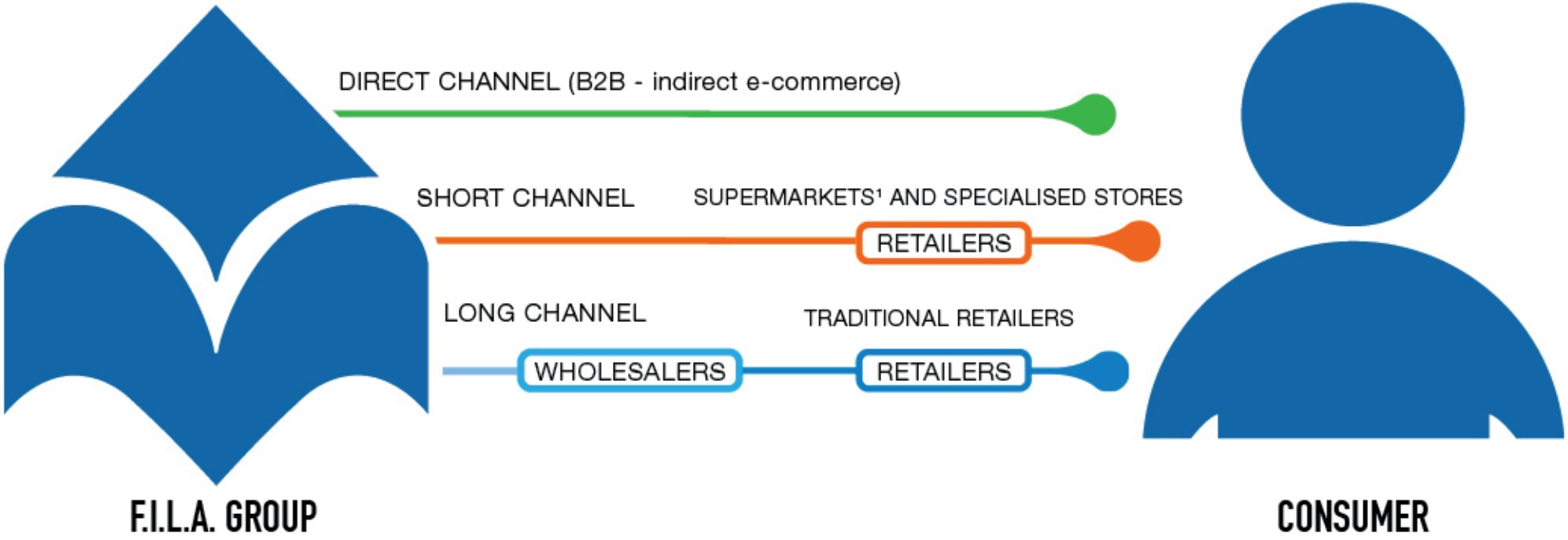
DISTRIBUTION



A CLEAR PATH FOR FUTURE GROWTH
DISTRIBUTION

Distribution choices depend on:

- Product features: *value product* - routine purchases and simplified process. *Premium Product* - structured and extensive range and personalised purchase process.
- By market characteristics: size, number, geographic spread, purchasing habits.



¹ Supermarkets: large supermarkets, smaller stores

A CLEAR PATH FOR FUTURE GROWTH
DISTRIBUTION

Distributors are key partners with whom mutual benefit is created:

- Transparent pricing policy (global pricing policy).
- Margins for intermediaries.
- Potential differentiation by channel (supermarkets, traditional market and school suppliers).
- Trade Marketing activities in support of sell out.

SUCCESSFUL ACQUISITION STRATEGY

SUCCESSFUL ACQUISITION STRATEGY
KEY INTEGRATION FACTORS

- Restructuring and centralisation of corporate functions.
- Establish uniform production processes in order to ensure increasingly interchangeable facilities.
- Reorganisation of the production structures and product warehouses.
- Analysis of cost and revenue synergies for improved margins.
- Restructuring of the product and brand portfolio.
- Focus on own brands, reducing private labels, utilised only strategically.
- Extension of successful product lines.
- Reduction of commercial intermediaries to get closer to the market/consumer.

SUCCESSFUL ACQUISITION PROCESS

ACQUISITION OF: DIXON DIXON TICONDEROGA COMPANY

- Restructuring and reorganisation process completed.
- Product range quality upgrading process completed.
- Revenue growth from 116.7mln $ in 2006 to 162.4 mln $ in 2016.
- EBITDA margin from 7.5% in 2006 to 17,3% in 2016.
- Segment market share growth.

SUCCESSFUL ACQUISITION PROCESS

ACQUISITION OF: LYRA Germany

- Restructuring reorganisation completed.
- Restructuring of the product portfolio and focus on the brand and the pencil segment, Lyra's historic business.
- Leveraging on the quality of Made in Germany for pencils and production upgrade.
- Increasingly global brand.
- Revenues from 26.6 mln € in 2009 to 21.8 mln € in 2016.
- EBITDA margin from negative in 2006 to 14.2% in 2016.

SUCCESSFUL ACQUISITION PROCESS

INVESTMENTS IN WFPL: DOMS®

- Restructuring and reorganisation process completed.
- High recognition of the DOMS brand on the Indian market established in part through a targetted branding and advertising policy, signifcant reduction of private labels.
- Doms was recognised in the “India’s N.1 Brand Awards 2016” in the Stationary category.
- Doms brand leader in innovation, quality and profitability, European standard production.
- Major hub for Asian market development and source of alternative production facilities for the Group, implementation phase ongoing.
- Consolidated national distribution network reaching over 150,000 sales points.
- Revenues from 20.1 mln € in 2013 to 49.4 mln € in 2016.
- EBITDA margin improvement to 14% in 2016.
- Segment market share growth.

ENTRY INTO ART & CRAFT SEGMENT AND FOCUS ON EXECUTION

ACQUISITION OF: maimeri

- First step in the Art & Craft segment.
- Strong brand recognition in Italy in Premium Fine Arts segment.
- Major distribution synergies with F.I.L.A. and Lyra currently exploited.
- Technical quality upgrade of the entire product range, positioning it increasingly in the excellence tier of the Fine Arts Made in Italy segment.

ENTRY INTO ART & CRAFT SEGMENT AND FOCUS ON EXECUTION

ACQUISITION OF: DALER ROWNEY

- Restructuring and reorganisation ongoing, in terms of production, distribution and product range.
- Leverage on positioning of Daler in UK and USA with major dealers to integrate range with existing school products as well.
- Integration of brand portfolio and products between Maimeri/ Daler and positioning in markets ongoing.
- Adjustment of Daler distribution to the model through F.I.L.A. branches.
- Focus on stabilisation of revenues in the short-term and improving margin, according to F.I.L.A. standards.

ENTRY INTO ART & CRAFT SEGMENT AND FOCUS ON EXECUTION

ACQUISITION OF: ST CUTHBERTS MILL

- Consolidation of the product range in the high-end fine arts paper segment complementary to Canson.
- EBITDA margin, over 20% and further growth to synergies.
- Shift from buy to make strategic product line such as: watercolour paper, artist editions paper and digital printing for Canson.

ENTRY INTO ART & CRAFT SEGMENT AND FOCUS ON EXECUTION

ACQUISITION OF: CANSON®

- Production and sale of high quality paper for Art & Crafts and schools and technical paper.
- Direct presence in key markets and recognised leadership.
- Perfectly complementary product range to F.I.L.A. in the colour and drawing segment for schools and the fine arts.
- Productive synergies with St.Cuthberts and Daler Rowney in the paper segment.
- Commercial synergies on the School and Art & Craft distribution channels.
- Technologically mature segment in product terms, without need for significant investment.
- Production, commercial and distribution restructuring underway in order to achieve major cost and revenue synergies.
- Reduction in number of branches, creating Group branches in key markets for development.
- Leverage on Canson's market positioning in regions where F.I.L.A. is a follower or without presence.
- Focus on stabilisation of revenues in the short-term and improving margin, according to F.I.L.A. standards.

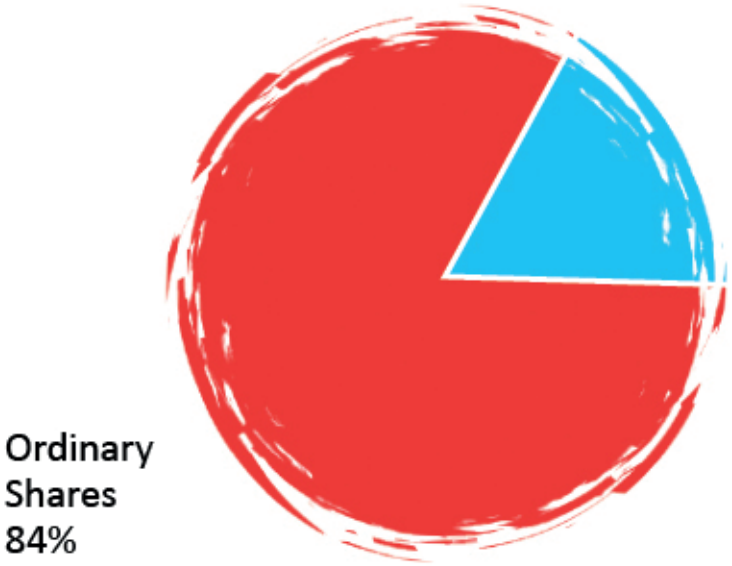
F.I.L.A. CORPORATE GOVERNANCE

THE BOARD OF DIRECTORS

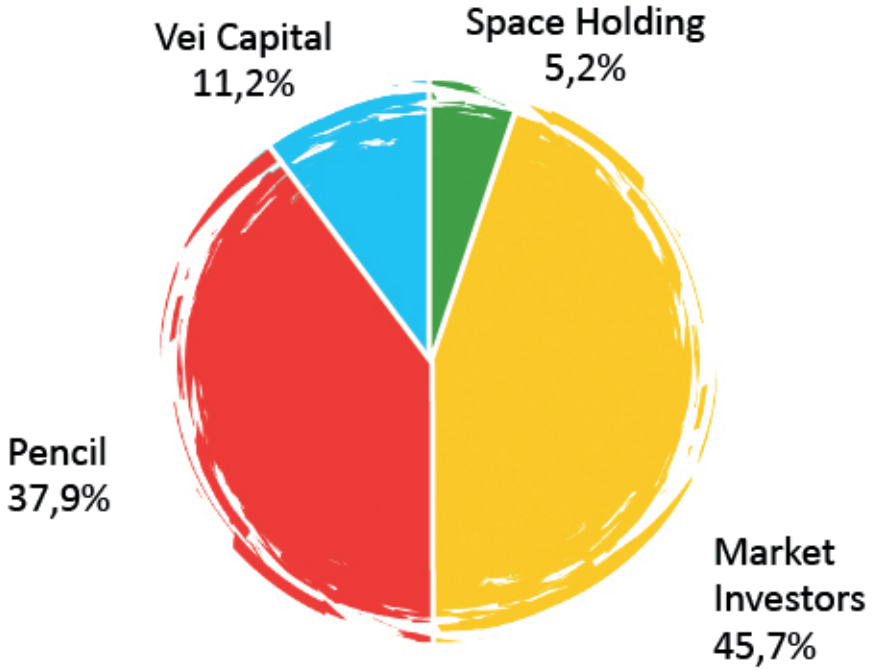
(*) Independent Director as per Article 148 of CFA and Article 3 of Self-Governance Code
(**) Non-Executive Director
(***) Lead Independent Director

F.I.L.A. SHAREHOLDERS

TOTAL SHARES[1]



ORDINARY SHARES ONLY



[1]Total shares 41.232.296, of which : Ordinary shares 34.665.788, Class B shares 6.566.508 (enjoy three votes each in accordance with Article 127-sexies of Legislative Decree No. 58/1998).

Last update May 20th 2017

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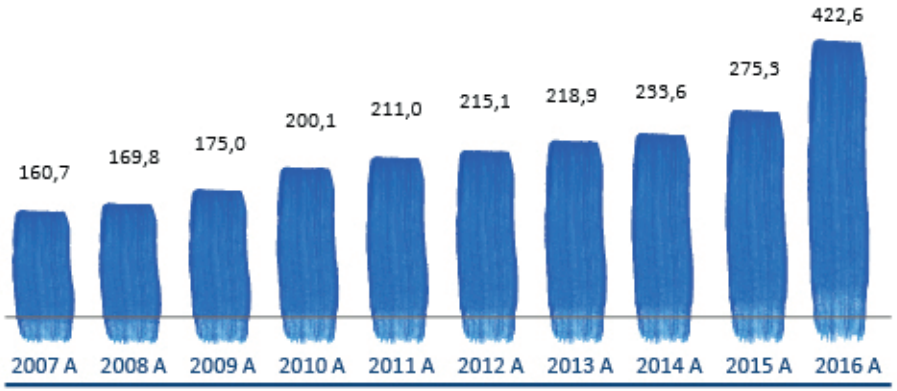
FINANCIAL HIGHLIGHTS

F.I.L.A. AT A GLANCE

TOTAL CORE BUSINESS SALES

2007-2016 CAGR: 11,3%

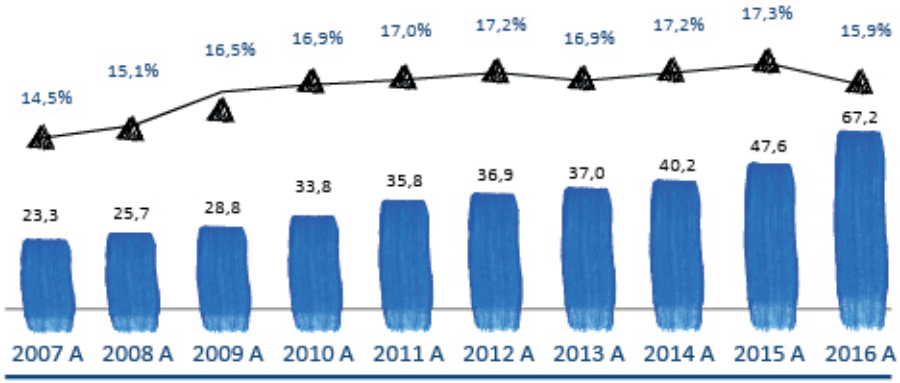
(€ million)



ADJUSTED EBITDA (1)

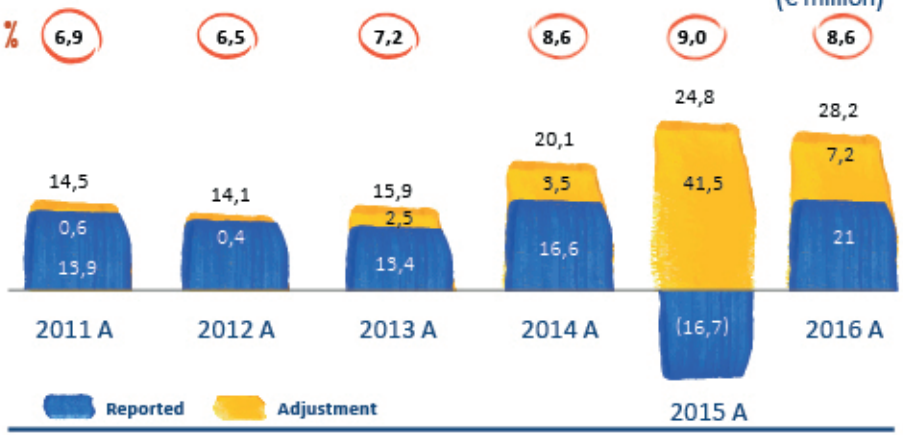
2007-2016 CAGR: 12,5%

(€ million)



ADJUSTED NET INCOME (2)

(€ million)



NET DEBT - YEAR END

Source: Company data

(1) Main adjustments to reported EBITDA are related to related to non recurring opereting income and expenses as for M&A, listing and restructuring activity.

(2) Adjustments related to non recurring items, operating and fianancial, net of tax effects.

BRAND PORTFOLIO

The F.I.L.A. Group has a portfolio of over twenty premium brands in the following product categories, satisfying a broad and diversified customer base and with significant geographic reach.

PAPER

CANSON
ST CUTBERTH MILL
DALER-ROWNEY

COLOURS

MAIMERI
DALER-ROWNEY
LUKAS
LYRA
GIOTTO
PRANG
VINCI and VIVIDEL
BLANCA NIEVES
DOMS
LICYN

MODELLING

GIOTTO
DIDÒ
PRANG
VINCI and VIVIDEL

WRITING

LYRA
TRATTO
DIXON
TICONDEROGA
METRICO/MERCURIO

BRAND PORTFOLIO

GIOTTO

An iconic brand for schools, creativity, drawing and colouring since 1923. The Italian brand which for almost a century has excited generations of children today features an extremely broad range of products, renewed every year to satisfy every school and free time need. Giotto has always been a symbol for quality and production innovation.

Pencils, wax and oil crayons.
Felt-tip pens.
Chalk.
Paints and watercolours.
Glues.
Modelling products.

Europe
Asia
South America

PRANG

In 1897, Louis Prang founded Taber-Prang Art Company, which in 1931 merged with the American Crayon Company. Louis Prang was a famous chromolithographist and artistic educator known internationally and who introduced artistic education to the American school system together with numerous inventions still used today. Prang today is a brand focusing on the artist in all of us thanks to the production of tools for colouring, painting and drawing.

Pencils, wax and oil crayons.
Felt-tip pens.
Chalk.
Paints and watercolours.
Glues.
Modelling products.

USA
Canada

Vinci®

Vinci Mexico was founded in 1947 and acquired by the Dixon Group in 1997. Initially, through the Vinci brand, it exclusively produced paints and complementary products. The original portfolio has significantly diversified and been enriched with the introduction of drawing and colouring products, quickly becoming one of the most recognised and renowned brands for school creativity tools on the Mexican market.

Pencils and wax crayons.
Felt-tip pens.
Chalk.
Paints and watercolours.
Modelling products.

Mexico
Central America

BRAND PORTFOLIO

Originally called School Colour, Mapita is an iconic coloured pencils brand in Mexico. Since the beginning of the 1990's its packaging has been styled on the map of Mexico, making the product extremely recognisable and popular. Blancanieves. Synonymous with coloured pencils since 1944 when Manuel Espinoza Ardila, owner of the company Lapicera Mexicana acquired by the Dixon Group in 2010, launched the company in the Mexican market. The brand's power resides in the loyalty of generations of consumers and the nearly 250 million pencils sold each year.	Pencils.	Mexico
Launched in 1913, Ticonderoga has always been one of the strongest and most recognised brands in the United States. Always known for its graphite pencil production, the company quickly began to focus on high quality products, writing tools for school and those for the office and personal use.	Graphite pencils. Tools for writing, highlighting and marking.	USA Canada Mexico China
The symbol of Italian writing. A line created at the beginning of the 1970's with two cutting-edge products: Tratto Pen and Tratto Clip, recognised with the Compasso d'Oro design award in 1979. Tratto today is a leading school and office brand.	Tools for writing, highlighting and marking.	Europe

BRAND PORTFOLIO

DOMS®

DOMS was launched in 2007 and features a portfolio of products for writing, designing and colouring, principally used at schools and offices.
The brand was included in India's "The Fast 50 Brands 2015", recognising those brands that grew most in the year and has significantly contributed to the country's development. Doms was also recognised in the "India's N.1 Brand Awards 2016" in the Stationary category.

Graphite pencils for writing.
Erasers and sharpeners.
Pencils and wax and oil crayons.
Paints and watercolours.
Glues.
Technical instruments for designing.

India and far east

DAS®

The DAS brand is an acronym of its inventor – Dario Sala – who filed the patent in 1962. Air-hardening marbling modelling clay is a modelling material with almost infinite expressive possibilities, satisfying all technical requirements and stimulating, at the same time, creative freedom. The product is known and used across the world by children, hobbyists and professionals of all ages.

Modelling clay.

Global Brand

didò

Play is natural with modelling clay made from safe ingredients for children from two years of age. Launched in 1984, Didò is the clay for play, entirely natural, created as a specific clay for a child's introduction to this mouldable element. Didò meets the child's need to touch and manipulate - indispensable for sensory development.

Clay for play.

Italy

BRAND PORTFOLIO

CANSON®

Papiers d'inspiration depuis 1557

The Canson Group, founded in 1557 by the Montgolfier family, has its head-quarters in Annonay in France, production facilities in France and conversion and distribution centres in Italy, France, the USA, China, Australia and Brazil. Canson products are available in over 120 countries.
Canson is presently the global leader in the high added value paper sector for the fine arts, schools and leisure sector and marries a century old tradition with the most innovative technology.

Fine arts papers (watercolours, oil, acrylic, drawing and coloured papers).
Paper and albums for school and leisure time.
Paper for artistic and photografic digital printing.

Global Brand

ST CUTHBERTS MILL

Located in the ancient cathedral in the city of Wells, St. Cuthberts has produced paper since the beginning of the 700's. The company is currently one of the leading highest quality paper producers for the fine arts and specialises in a particular technique called the "cylinder mould", using one of the last cylindrical moulds remaining in the world, built in 1907.

Paper for the fine arts (watercolours)
Paper for artistic and photografic digital printing.
Artistic print and edition.

Global Brand

DALER ROWNEY

The Rowney Company was founded in 1783 when Richard and Thomas Rowney began selling perfumes and powder for wigs, before concentrating on developing colours for the fine arts.
The company is specialised in producing high quality materials for the fine arts, with a tailor-made range for both professional and amateur artists and for art schools.

Colours for the arts (watercolours, oils, acrylics, paints and inks).
Fines art accessories (brushes, easels and canvases).
Charcaols and pastels for the fine arts.
Fine arts paper (watercolour, oil, acrylics, drawing and coloured papers).

Global Brand

BRAND PORTFOLIO

MAIMERI

Historic Italian brand created in 1923 by Gianni Maimeri, artist and company founder, on the concept of absolute perfection. The Maimeri brand represents a tetrahedron, a perfectly proportioned unique prism and when observed from any angle appears identical and with an apex towards the top. The perfection exemplified by the symbol extends to all Maimeri products, today synonymous across the world with Italian excellence in the production of painting and drawing materials, an example of major passion and continual synergy between the Arts, Industry and Innovation.

Colours for the fine arts (oils, acrylics, watercolours and paints).
Colours for restoration and pigments.
Fines art accessories (brushes, easels, canvases and frames).
Charcaols and pastels for the fine arts.
Decorative arts.

Global Brand

LUKAS

Since 1862 this brand has set itself apart as a union of tradition and innovation, becoming a go-to solution for artists such as Van Gogh, Baselitz or the Achenbach brothers, and for all those who have found in the Lukas brand and its products for the fine arts the high quality which they have sought.

Colours for the fine arts (oils, acrylics, watercolours and paints).
Fines art accessories (brushes, easels, canvases and frames).
Decorative arts.

Global Brand

LYRA Germany

The Lyra brand originated in 1806 when Johann Froescheis began to produce pencils in a factory in Nuremberg. In 1868 the LYRA symbol was registered as a brand. For over 200 years, Lyra has been a by-word for "Made in Germany" innovation and excellence, with a range of high quality pencils and innovative design. An extensive and complete line with a dedicated offer for artistic drawing, technical drawing and schools.

Pencils, pastels, charcoals for the fine arts.
Coloured crayons for school and free time.
Technical instruments for drawing.
Graphite pencils for the school and office.
Erasers and sharpeners.

Global Brand

“Coming together is the beginning.
Keeping together is progress.
Working together is success.”

- Henry Ford