

Nitto

Innovation for Customers

Vertical Integration

Afera Tape Conference - October, Turin



100th
ANNIVERSARY



The Nitto Group - global reach, local presence

Nitto Group offers 13.500 products to various markets using different technologies



Founded in
1918
(Ibaraki,
Japan)

29,643
employees
worldwide

94
companies
worldwide

767.700
million yen
turnover
worldwide

As of 31st of March 2016
(= 6.4 billion euro)

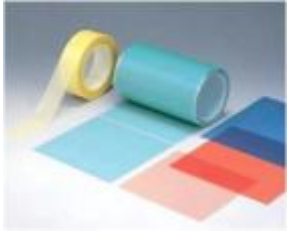
Nitto Selected as Top 100 Global Innovator by Clarivate Analytics

Nitto's President commented "I am honored to have received such a **distinguished prize for the sixth consecutive year**. This year's award is the result of the fusion between our business strategy and our intellectual property strategy. We will continue to enhance the value of our intellectual property, practice "Innovation for Customers", and strive to maximize corporate value."

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Sanshin strategy

- Capitalizing the characteristics of the existing business
- Technology and Marketing functions engage in continuously developing the business



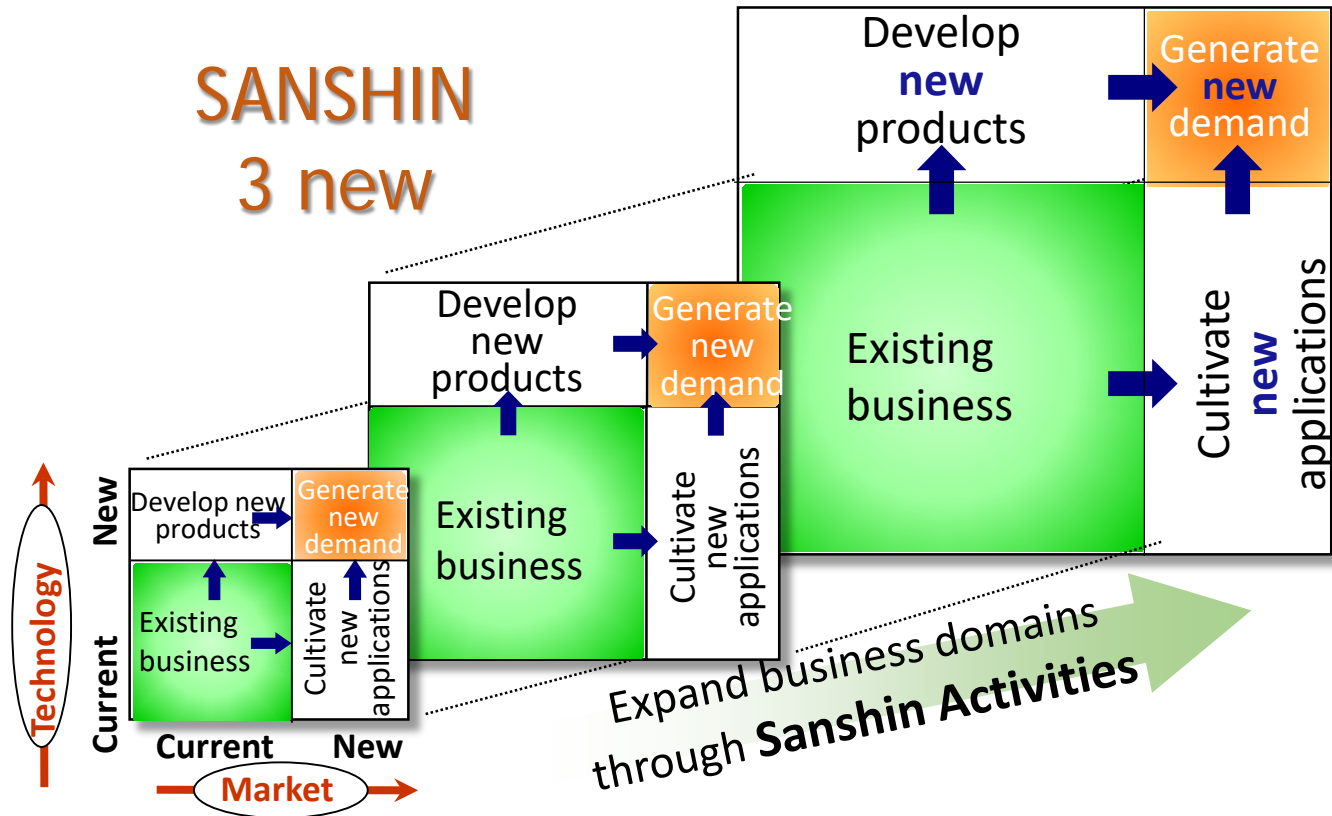
Thermal Release Sheet



Polarizing Film for LCD



Transdermal patch



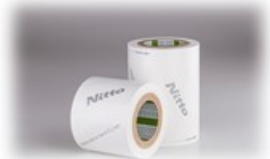
Customer insights → Speed to market

Early days – Very traditional way of doing business

Adhesives



Film Forming



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Customer



Advanced Coating



Roll-to-Roll processing

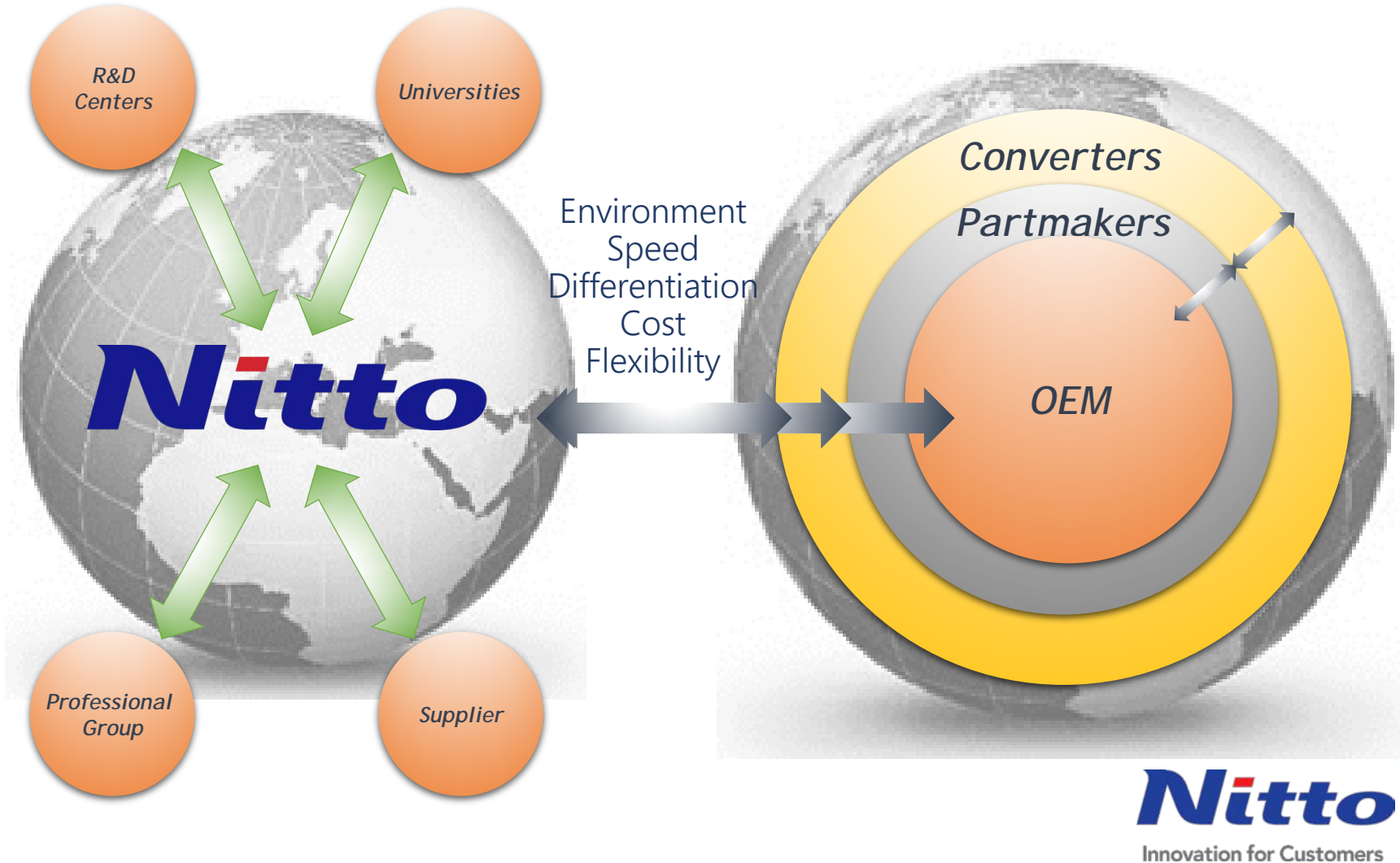


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Customer insights → Speed to market ok?

- Nowadays – Deep knowledge of the total supply chain & Up- and downstream partnerships



Some examples



Green flame retardant
Specialised testing
expertise



Reduction of CO2 emission
by creation of new solvent
emulsion

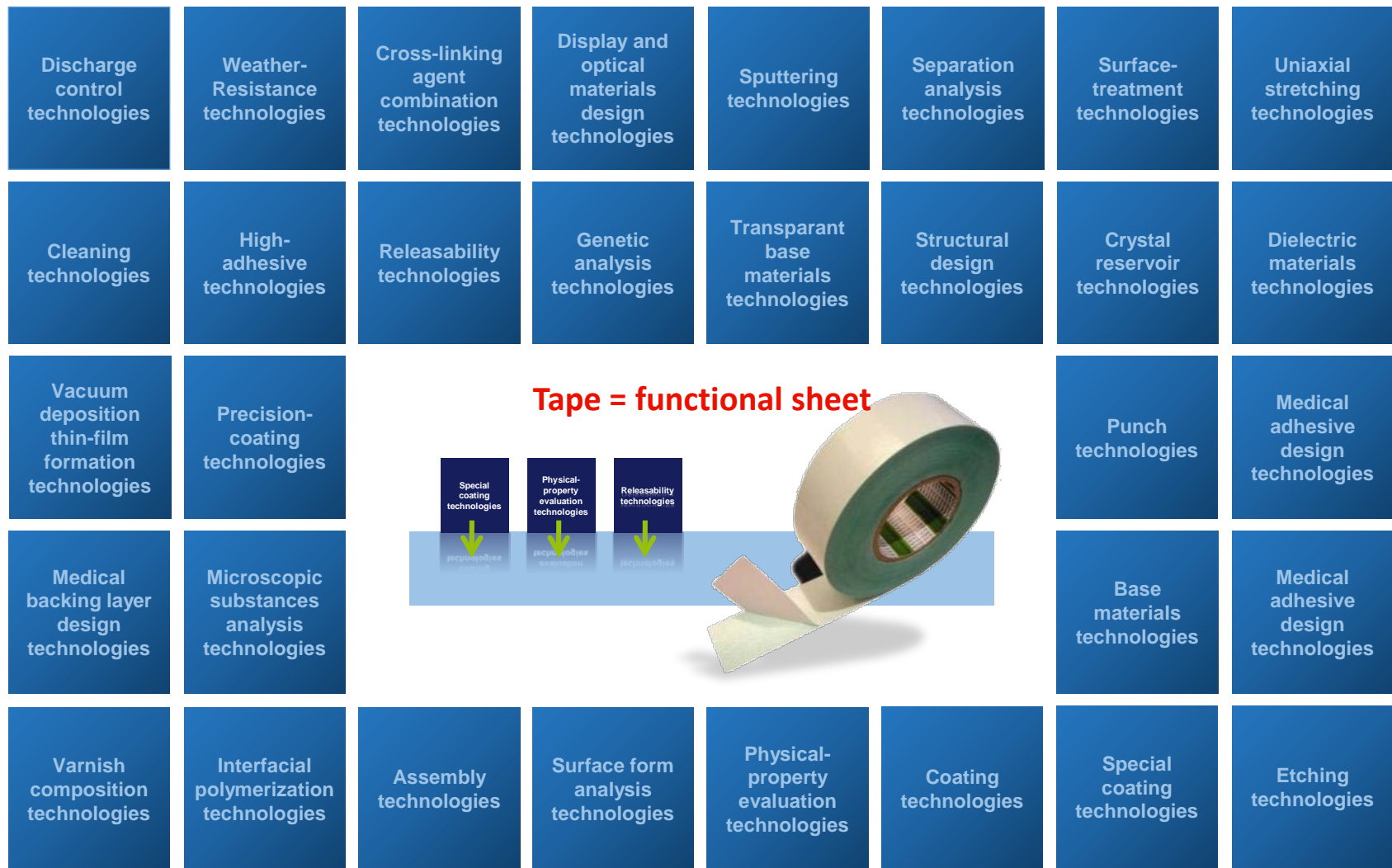


Automation by tape application
systems



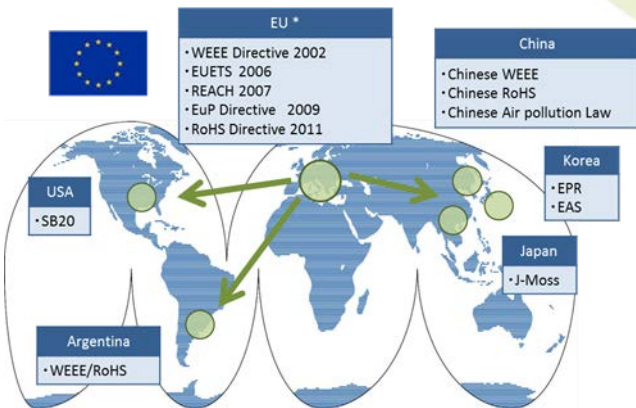
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Technology platform



Combination of technologies creates new functions

Sustainable development in need for partners



Is this a threat or an opportunity?

CHANGE THE MINDSET from supplier to end customer

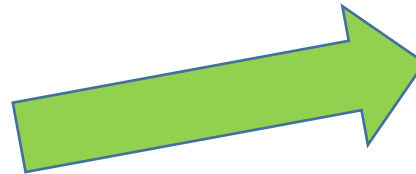
- R&D
- Sales
- Production
- Purchasing...



✓ "Go Genba!"



- Define the functionality:



Permeation



Protection



Transference



Blocking



Adhesion

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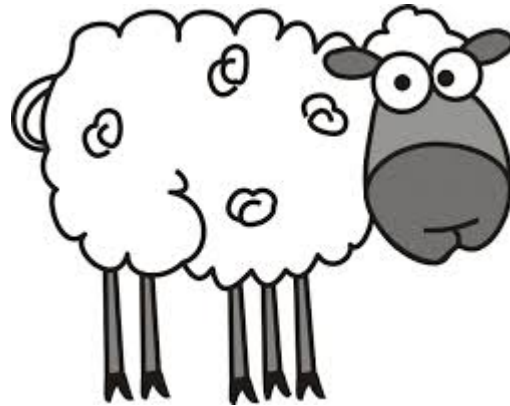
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Is this a threat or an opportunity?

Vertical integration (2.0) over total supply chain

What is the key to success?

- Consider cultural differences
- Balance between innovation & disclosure
 - Non-disclosure agreements
 - Joint developments
 - intellectual property



End



Thank you for your attention