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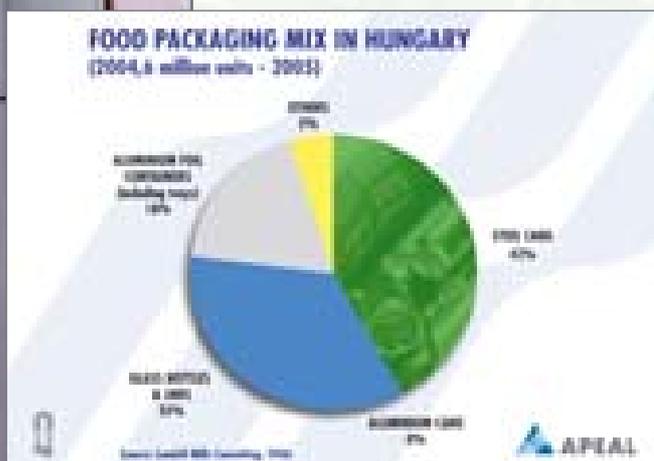
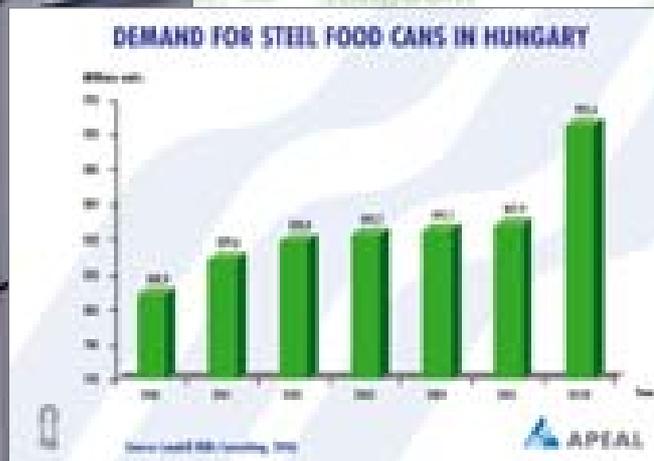




Special feature

STEEL PACKAGING: A VALUED CHOICE IN THE GROWING HUNGARIAN FOOD MARKET

The food processing industry remains one of the most important sectors in the Hungarian economy, representing up to 14% of industrial production. Within the food processing industry, vegetable and fruit canning and pet food are two important market segments. No wonder: the quite favourable climate conditions promote the production of most horticultural crops for vegetable and fruit growing. And the strong agricultural background in Hungary enables an excellent production capacity for pet food manufacturing using Hungarian farm produce as raw materials.





The vegetable canning sector in Hungary

The canned vegetable business is the most important part of the Hungarian canning industry. In this industry the production of sweet corn and peas represents the major share. At least 2/3 of the Hungarian production is destined for export.

There is only one international player in this market segment, namely Bonduelle. For many years, the company Globus has been another well-known company in Hungary, the other companies are private or just privatised companies. This means that these companies are relatively new (1-10 years old) family or private businesses.

It is usually difficult to manage the seasonality of vegetable production with all the cash flow constraints of a relatively young company. Nevertheless, the strong agricultural and professional background provides a good, competitive position for the companies in this sector. Their growth rate is often quite striking as a consequence.

Here are the most important names in this sector:

- **Bonduelle**, the dominant player, both in Hungary and in the export from Hungary
- **Globus**, a well-known producer in particular in Hungary
- **EKO**, privatised at the end of 2005 and owned by a Russian trader.
- **Kelet Food**: family-owned company, developing very fast (see later in this article)

Some other important canners in this sector in Hungary are: Puztakonzerv, Schenk es Tsa, Kecskemeti Konzervgyarto, Sztatmari Konzervgyar and Aranyfacan.

The pet food canning sector in Hungary

Pet food manufacturing is a very fast growing segment of the food industry in Central and Eastern Europe. In Hungary the main producers are multinational companies like Nestlé, Masterfoods and recently also the Dutch company Provimi. This latter company took over the pet food canning company Pet Hungaria (see later in this article). Growth rates for pet food in cans are double-digit and the odds are quite good for the future.

Each of these producers have their own strong brands on the market, but some of them are also manufacturing private labels for the different supermarket chains like Tesco, Auchan, Billa, Cora, Profi, Metro, Kaufland etc.

For both of these sectors, Hungarian manufacturers and distributors have a great opportunity to maintain their position and obtain an increasing number of orders from EU partners. APEAL wanted to take a closer look at this booming market, which offers so many opportunities to steel packaging. APEAL has interviewed two Hungarian brand-owners to find out why this packaging medium is so valued in this market.



DYNAMIC GROWTH OF STEEL PACKAGING IN THE HUNGARIAN PET FOOD MARKET

In 2000, Werner Bruse founded Vasi Pluto, a pet food company located in Sopronbörpacs, near Budapest. Werner Bruse, born in Germany, had previously held several managerial positions in a number of pet food companies throughout Europe, among which Masterfoods, Saturn and Jupiter.

Originally producing wet pet food products exclusively, Vasi Pluto, now called Pet Hungaria, has extended its range to include dry pet food products. In the 5 years since its launch, the company has grown rapidly, with its production of 400g cans increasing from 5 million to well over 100 million today. In October 2005 the

Dutch company Provimi, one of the world leaders in the pet nutrition business, acquired 100% of 'Pet Hungaria' shares, having already invested in the pet food business in Poland and in the Czech Republic.





Special feature

DYNAMIC GROWTH OF STEEL PACKAGING IN THE HUNGARIAN PET FOOD MARKET

Csaba Borsfai, purchasing manager, and recently also appointed plant manager, tells us more about the growth of Pet Hungaria and their packaging range:

Csaba Borsfai: 'We are one of the companies active in this segment and setting the trends. We have been using only three can sizes from the beginning, namely a 400 g can for cat food and two different cans for dog food, one of 1200 g and another one of 1240 g.

There have been quite some developments in the cans over the last 5 years. Crown Food is by far our main supplier and we co-operate full heartedly with them to make the cans lighter and more convenient for the consumer. The results of our joint efforts are encouraging: the body thickness of our 400 g cat food can decreased by 30%, from 0.20 to 0.14 mm, in just 5 years. A gauge of 0.13 mm is already being tested which represents another 7% decrease. The body thickness of our dog food cans was reduced by 8%, decreasing from 0.26 to 0.24 mm. The ends and bottoms followed the trend and were also downgauged.

Another important development has been the change-over to steel Easy Open Ends (EOEs). Since September 2005 we have in fact completely switched over to steel EOEs. It is quite simple: in the pet food market, cans with EOEs are now the standard, therefore it has become difficult to sell pet food in cans without this feature.

Pet Hungaria supplies mainly to private label pet food brands, such as Tesco, Metro, Match, and Penny. It sells 70 to 80 % of its production to the home market, the rest is destined for the export market. All the cans are labelled with paper – the use of printed cans is simply not an option, because of the costs involved.'

Is Csaba Borsfai satisfied with the decision to use cans for their product range?

Csaba Borsfai: 'We find steel cans very efficient and cost-effective for pet food. Nevertheless, in order to be able to supply the full range of pet food products we also

fill some flexible retortable pouches. However, our profit only comes from our canning lines, not from the pouches, in particular because of the high investment costs for printing plates and the high costs to change decorations in the flexo-printing process.'

What further developments would you like to achieve regarding cans?

Csaba Borsfai: 'I personally think it is important for the can making and can filling industries to downgauge cans even more; it will really help to cut down on today's 'Green Dot' costs. Indeed, the lighter the can is, the less you pay. We have also been looking into peelable ends, but do not apply these yet. However, we remain open to innovations in cans.

I foresee a very good future for cans in the pet food industry in Central and Eastern Europe.'



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THE CAN'S STRENGTH AND PRODUCTION EFFICIENCY: AN ASSET FOR THE RUSSIAN MARKET

Laszlo Partizer is Managing Director of the food company Kelet Food 2000 Kft in Nyiregyhaza, some 200 kilometres from Budapest. The company was founded in 1996 and started by producing mainly vegetables and fruit packed in glass jars. The yearly production totals approximately 10 million jars. Sweet corn in cans was added to the product range later on. Most of the production was exported to Russia, an important and longstanding trade partner for Hungary.

Specialisation in canned sweet corn and peas pays off

In 1998 the Russian Crisis hit Hungarian producers of canned vegetables that were exporting to Russia. Indeed, the Russian market collapsed, huge stocks could not be sold and Hungarian canners sold the stocks sometimes with a rebate of 50 %.

Laslo Partizer: 'We noticed that during this Russian crisis the demand for two products remained high, that for canned sweet corn and for peas. We therefore decided to specialise in these two products and invested heavily in a new modern production line. The result of this strategy is that we filled approximately 45 million cans in 2005 with these two products, the share of sweet corn being greater than that of peas. We also



Investing for the future

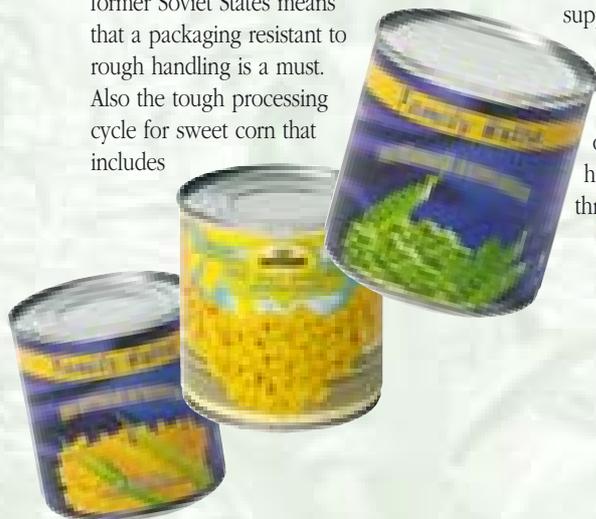
produced 5 million special non-standard products, such as small gherkins packed in glass jars. At the same time we also decided to focus on two main market regions, namely Western Europe and Russia plus other ex-Soviet States like Ukraine and Kazakhstan. French and Taiwanese producers of sweet corn are strong competitors. But, Kelet Food 2000 is situated closer to the rapidly growing Eastern European markets and the longstanding relationship it has developed with local customers enables Kelet Food 2000 to even gain extra market share.

Laszlo Partizer: 'At the same time our quality standards are improving. Indeed, we are qualified for the IFS and BRC certificates and we are implementing HACCP standards. The Swiss organisation Bio-Suisse has qualified us for the supply of organic products and we have successfully undergone various quality audits carried out by retailers such as Metro.

We are also continuously working together with farmers and suppliers of seeds to improve further the taste of sweet corn varieties.'

Steel cans: the preferred packaging type for Kelet Food 2000

The transport conditions in Russia and other former Soviet States means that a packaging resistant to rough handling is a must. Also the tough processing cycle for sweet corn that includes



vacuumising of the cans requires a solid package.



Laszlo Partizer: 'Strength and production efficiency are some of the key advantages of steel food cans. The classical three-piece necked-in cans cover 100% of our production. Retailers like them because they are easy to stack on the supermarket shelves. Body thickness has been reduced from 0.20 mm in 1999 to 0.18 mm today. A further reduction in thickness going down to 0.17 mm is on the way.

Only 4.4% of our ends are Easy Open Ends (EOE). Cans with EOE are usually for the Western European markets; the Eastern European markets are not yet ready to pay the extra cost of an EOE, despite the extra convenience it brings to the consumer.'

Are you satisfied with your cans?

Laszlo Partizer: 'Basically we are quite satisfied with our cans, in particular because of their high efficiency on our production lines and the very good protection they offer our products in often rough handling circumstances. Cooperation throughout the supply chain is necessary to continue downgauging the cans we use. An example to illustrate this: while the can maker cuts down further on the thickness of the can walls and its weight, the filler has to improve the handling of the cans throughout its filling lines.

Laszlo Partizer is quite optimistic about the future of his company. The company is investing heavily in capacity expansion but also in higher product quality.

Laszlo Partizer: 'We are presently investing in a new production line with a capacity of 600 cans per minute. This will enable us to produce the 65 million cans we expect to sell in 2006 and still allow for some further expansion. In addition to the extra capacity, this line also has an optical sorting device that sorts 100% of the vegetables disregarding automatically those vegetables of poorer quality, and therefore increasing the overall food quality. To be able to get the organic quality vegetable supplier certificate this kind of equipment is needed. We are proud to be the very first company in Hungary to use such a tool; even large competitors do not have such equipment.

We will also be the only company in our market segment that cleans 100% of its used water. By doing so, we will be saving a potential 300,000 euros per year in water pollution taxation.

You see, we really do believe in the future of our company and the future of our market. And this is only the beginning of the story!'

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STEEL PACKAGING FOR LUXURY GOODS: TRANSFORMING SPECIAL INTO UNIQUE



Luxury packaging, once limited to expensive perfumes and spirits, is now rapidly expanding into other sectors including cosmetics, toiletries, chocolates, pharmaceuticals, tobacco, watches, jewellery and up-market food items.



The retail world is fiercely competitive and standing out on the shelves is a constant challenge. It is the packaging which plays a key role in presenting the brand values of the product and for a luxury brand, which differentiates itself on quality and image, the importance of the packaging is intensified. Luxury brands rely on packaging to cultivate an image of high quality, elegance and sophistication for their products.

There is a material and a new technology for every occasion but choosing the right combination to create excitement on the retail shelves is not straightforward. Amongst many different packaging types used in the luxury world, steel is gaining more and more ground because of the unique benefits it can offer, including advanced shaping performance and a multitude of decorative finishes, embossing and debossing, where an image or shape is depressed into the material so it sits below the surface.

Indeed, the opportunity for creativity has never been so dynamic, hence why many famous whiskey, cosmetic and confectionery brands opt for steel as their packaging medium, taking full advantage of the numerous technologies available. Although APEAL cannot showcase all examples, we now present the latest, most striking ones recently to dazzle our retail shelves...

SPECIAL DECORATIVE FINISHES

As well as shaping, advances in decorative technologies means that steel packaging can achieve a wide range of creative decorative finishes, such as crackle effect, mirror effect, colour-change, matt, sparkling, soft-touch, perforation, mesh and holographic effect.

One example is lenticular, a unique printing technology that allows the vivid illusion of movement, morphing, and 3 dimensional to be portrayed onto a 2D printing surface. In Spain, Envases Metálicos Eurobox have been using the technique for the last 3 years and have successfully applied novel lenticular finishes to metal for a range of spirit brands, among which Nicolas Feuillatte, Baileys, Absolut Vodka, Jameson and J&B, in addition to international cosmetic manufacturer Intercos. They have recently produced a striking can with lenticular finish for eau de toilette and after shave to commemorate the 50th anniversary of the Italian brand Pino Silvestre. The can, which vividly evokes the pines of a christmas tree, proved very successful on the Italian market. 'Lenticular is a novel, eye-catching finish which can help create movement, differentiation and impact on the shelves of department stores and supermarkets,' says Rosana Devesa, Marketing & Publicity Manager, Envases Metálicos Eurobox.



PERFORATION TECHNOLOGY CREATES PREMIUM EFFECT

Jean Paul Gaultier had already used a 'classic' steel container for the launch of its world-renowned perfume 'Classique', back in 1997, and subsequently for the launch of its 'summer collection' in a highly sophisticated decorated can (see APEAL news 16). For the festive season, Crown Speciality Packaging created a sleek steel promotional package delivering the exact high-end, upscale and stylish look required by Jean-Paul Gaultier. The 140mm x 200mm cylindrical steel packaging features cutting-edge asymmetrical perforation with designs such as snowflakes and Christmas trees. The cans hold paired combinations of "Le Male", "Classique Eau de Toilette", "Classique Eau de Parfum," and Fragile products, in a choice of pink, blue, silver, and gold with a matt finish. The cans feature 4 different sizes of holes, ranging from 0.7 to 1.5 mm in diameter.

Jérôme Gavinet, Product Manager at Beauté Prestige International comments, 'Since the original launch of 'Classique' in a classic cylindrical food can, we continue to exploit the differentiation potential of metal packaging to present the Jean-Paul Gaultier range. Always setting the trends, we have made another leap forward with a unique steel box produced in a limited series. Our design concept was very challenging to produce, but in partnership with the can manufacturer, we've succeeded in bonding creativity with technology to deliver a real work of art.'



Decorative cans

STEEL PACKAGING FOR LUXURY GOODS: TRANSFORMING SPECIAL INTO UNIQUE

DEMONSTRATING VALUE THROUGH SOPHISTICATED PRINTING

Alongside the famous brands, other lesser known companies are exploiting the excellent decorative finishes achievable with steel, to cultivate an image of quality for their products. Can-printing uses offset lithography allowing fine design details and interesting opportunities for special effects.

An exclusive steel ice cream can with decorations from Hans Christian Andersen's fairytales, coinciding with the 200 year anniversary of the birth of the Danish writer, was developed by Glud & Marstrand for the small dairy "Is-mejeriet" in Randers, Denmark. Søren Guul of Is-mejeriet commented, "Our products are high quality products made from Danish cream, and according to our customers, they taste great too. However, we are a small unknown dairy offering a new product, and you cannot tell that the ice cream is good just by looking at it when you see it in the counter of the shop".

Why our choice of steel? 'We chose steel to underline the premium character of our products. We needed to communicate high quality and at the same time make consumers feel we are different from our competitors. Steel is a material, when decorated, that can really get the attention of the shopper. It's also a package that can have extended use, where the packaging stays around long after the product is consumed. We find this steel can so beautiful that we believe it could become a collector's item'.

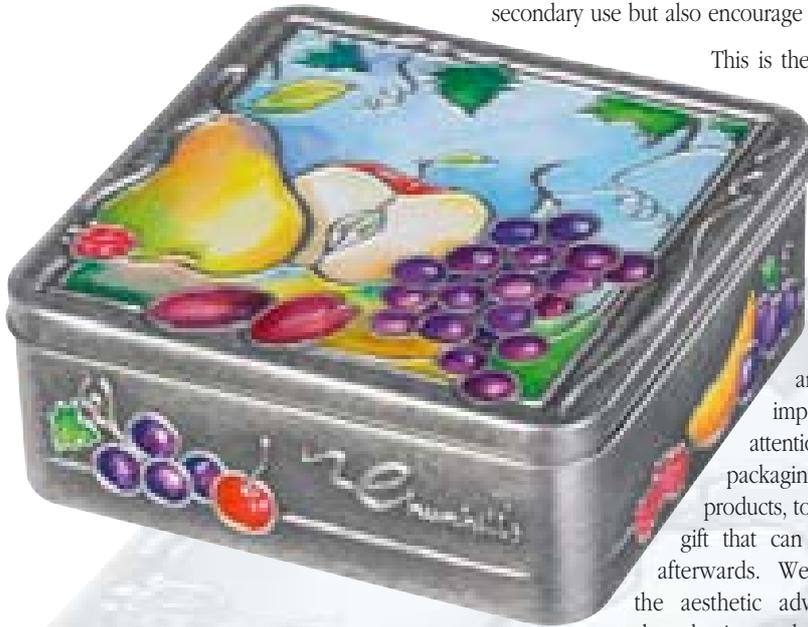


The decorative can "WØ Larsen 1864" manufactured for the famous Danish tobacco producer Orlik by German canmaker Klann Verpackungen has two distinguishing features - stunning printing and an exceptional lid design. The can is decorated with a sophisticated combination of matt and glossy elements, and extremely fine lid embossing adds to the elegant appearance of this can. Instead of the traditional can with inward or outside curls the 'Klann Premium Lid' creates a container with seamless design areas between lid and body. This not only enhances the excellent visual characteristics of the design but also increases the perceived value of the packaging.



A 'MUST TOUCH' FEELING FOR THE CONSUMER

Embossing and debossing provide alternative ways of enhancing the high quality look of a product, by emphasizing specific items such as logos and brand names for example. Also, perfectly fitting, detailed embossing on both lid and body not only give higher value and secondary use but also encourage a 'must touch' feeling for the consumer.



This is the case of the eye-catching 'Fruit and Vine' embossed decorative biscuit can created by Churchill's Confectionery, who are specialists in beautifully packaged gift confectionery with high decorative value. The tin is typical of the 'Tiffany' style, with colourful fruits printed on the can in a painting-like quality and embossing around them to imitate lead framing. "We believe that visual impact and contents which taste good are equally important, that's why so much care and attention goes in to designing attractive packaging to pack our high quality products, to provide that special

gift that can be treasured afterwards. We recognise the aesthetic advantages of steel packaging and its ability to convey a message of value," says Stephen Oliver, General Manager, Churchill's Confectionery PLC.



INNOVATIVE MATERIAL COMBINATIONS

In addition to forming steel into interesting shapes, some luxury brands pair innovative materials for a look that differentiates. One recent example is for Otard Cognac, who have launched a new metal can for their VSOP product every year for the last fourteen years. Their latest can features 'Silktouch™ paper' which was literally adhered to the surface of the metal. Eleonore Routoup, Marketing Manager for Otard explained that the objective was to continue the 'tradition' of using metal cans, but to create a new look and to bring it up to date. 'The originality of the can is in the daring combination of materials and colours. We kept the traditional aspect of the metal but wanted to create an element of surprise by combining it with a different material, the 'silktouch™'. To the same end the contrast in colours used - the acidity of the orange colour mixed with the reassuring grey and green colours.'

As we have seen, steel offers designers a wealth of opportunities in terms of packaging design. Can manufacturers, brand marketers and designers are working hard to push the limits of metal manufacturing. With increasing disposable income worldwide, the demand for luxury products is growing, leading to fast growth in the sector, and steel will continue to bring elegance, individuality and increased value to premium products.





Decorative cans

STEEL PACKAGING FOR LUXURY GOODS: TRANSFORMING SPECIAL INTO UNIQUE

LUXURY SHAPING

Progress in shaping technology has given designers additional scope for creative shapes, and brand owners the means to transform the ordinary into the exceptional.

J&B for example have launched a new, truly innovative packaging Twist 2005. The main technical challenge for this can consisted in getting a «twist» effect into shape of the can. During its development, technicians at French canmaker Virojangler concentrated their efforts on controlling the effects linked to the “twisted” drawing of the steel material. The maximum expansion of the metal had to be calculated to avoid any risk of default or even minimal deformation during mass production. Certain steps of the process required a precision of $\pm 0,002$ mm. But the most difficult element in the process was the making of the lid. The original shaping of the contours of the letters “J&B” required rigorous manual intervention. Over 40 steps with specially developed high precision tools were necessary to obtain that original “twist” effect’. Clémentine Giaconia of R’Pure, designers responsible for the project commented...“Creating an object for a brand like J&B, it’s developing the energy of the image by bringing new perspectives. Drawing inspiration from the vitality of contemporary graphism, the beauty of the can is in its lines of tension, the dynamics between the brand symbol and the synergy of the shiny and satin metallic effects”.



VIROJANGLOR: PIONEERS IN LUXURY PACKAGING

Founded in 1963, French canmaker VIROJANGLOR is specialized in luxury metal packaging and decorative can boxes. They have two complementary factories Virofer Italia s.r.l. and Virojangler China Manufactory Ltd allowing them to meet the various requirements of today’s promotional and industrial packaging. Interview with Jean-David Curiel, CEO at Virojangler.

What are Virojangler’s particular assets?

One of our major strengths is our ability to coach projects right from their infancy. We are a young and dynamic team which prides itself of providing the service similar to that of a creative agency, advising our clients right from the outset, offering them a really personalised service. Our objective is to give really added value to our client’s products.

We are very reactive and very flexible, being able to develop projects from scratch within a few weeks. The new technology that we have at our fingertips today, and our experience in the can sector are such that we are able to make up any shape of packaging, at competition-defying rates that very often rival those for cardboard or plastic boxes. Indeed, Virojangler lays out over 200 moulds: round, oval, square, rectangular, octagonal boxes as well as trays, posters, ashtrays and so on. We master the arts of embossing, stapling and offset printing. Our R&D department is constantly on the move to create and design new shapes, printing effects and types of metal.



What are the emerging trends in luxury packaging? Is there a new interest for steel for perfumes, cosmetics and alcohols, as opposed to other materials?

A study recently undertaken amongst our clients showed that the metal can is the preferred packaging of the consumer, for the simple reason that the end-user will re-use a metal packaging as a decorative box rather than throwing it away. A personalised metal box promotes a brand's image for years. It is thus an effective way of ensuring that the impact of an advertising campaign is prolonged as long as possible. It's also a way to be present in consumers' homes for years. In this respect, cardboard and plastic are limited – once you've removed the object, it's finished, you throw the packaging away immediately.

Thanks to advances in technology, we are more like a competitor for cardboard, whilst aluminium is 30% more expensive than tinfoil which is the principle material we use... even cosmetic brands are turning more and more to steel.

What specific advantages can steel offer luxury brands?

Metal offers a certain authenticity. It can feature a wide range of creative decorative finishes that give the product a luxury aspect. For example, a range of new varnishes and finishes exist such as soft touch, rubber finish, matt finish, mirror effect, selective varnish. We can also now play on metallic colours, which enhance the luxury feel of the product.

Nowadays Environment and Ecology are pointed up as crucial matters for society. Steel for packaging has become a highly popular material in the packaging market because it's easily and fully recyclable, as well as being completely versatile.

How do you see the development of the luxury packaging sector in the future?

I'm very positive about the future development of this market. We are now surpassing the limits and going one step further by starting to mix materials with metal. So steel is the base material, and we are mixing with plastic, integrating windows in PVC, even with luxury paper and leather imitations. These innovative combinations are extremely popular with clients.



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 **VIROJANGLOR**



Steel Packaging Gallery



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www.steelforpackaging.org



NEW APPLICATION FOR TRADITIONAL DWI BEVERAGE CAN



Lorenz Bahlsen Snackworld, has chosen to pack its 'World Selection' peanuts in a traditional DWI beverage can produced by Rexam Beverage Can Europe & Asia. The product represents an innovative use of a two piece beverage can introduced into a new product market, and provides clear differentiation from other traditional type packages. The product is designed to appeal to the consumer looking for a modern yet convenient 'on-the-go' snack option. Consumer opinion: a "cool new way" to enjoy peanuts.

PREMIUM OLIVE OIL PACKED IN CANS BY PHILIPPE STARCK



Crown Speciality Packaging in the UK has produced cans for Spain's La Amarilla de Ronda brand of premium olive oil. They are available in 25 cl, 50 cl and 3-litre sizes and are currently being sold at gourmet shops in Spain and the west coast of the US. Designer Philippe Starck is responsible for the containers' design.



SHAPELY CANS FOR NESCAU CAPPUCCINO



Expanded steel can with a modern, ergonomic shape and lithography by Brazil's Companhia Brasileira de Latas. The objective was to create a modern identity through a new shape to target the younger generation. The success of the product has lead Nestlé to introduce this new package for other special and differentiated products, such as Nescau® Light.



PREMIUM LINGERIE ON OFFER IN ELEGANT STEEL CAN



Customers at Etam retail establishments in France, Spain and Italy recently received their lingerie in elegant rectangular tins developed by Crown featuring images of prominent models. Denim jeans were sold in attractive cylindrical tins. The limited-edition canisters reinforce Etam's premium brand image both at point of purchase and at home, where the long-lasting collectors' containers can be used to store personal care items. A distinctive 190 x 125 x 70 mm rectangular tin was created for each of the country-specific lingerie lines carried in France, Spain and Italy. The 150 x 200 mm cylindrical tins for denim products were designed with special removable bottom ends to facilitate the packaging process. From concept to execution, the stylish tins were ready for distribution in less than two months.

PREMIUM PACKAGING FOR INTUIX INKJET PRINTER CARTRIDGE



Dexxon has chosen a steel container by Crown Speciality Packaging to package its printer cartridge. In a competitive market, the objective was to differentiate the product and give it a premium positioning, since ink cartridges are traditionally packed in plastic blister packs. Consumers have appreciated the new, 'sexy', steel packaging in a niche where standard packs predominate.



AFTER EIGHT ANY TIME



Decorated and embossed pocket-sized steel container for After Eight mints with 'squeeze top' opening system and integrated dispensing insert incorporated into the tin's bottom allowing the sweets to be taken out one by one. The 'squeeze top' allows for single-handed opening. The tin was exclusively developed by Hoffmann Neopac Switzerland for Nestlé Germany.



INSPIRING STEEL PACKAGING SOLUTIONS

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WATCHING YOUR WAISTLINE

More and more diet conscious consumers are concerned with the number of calories contained in their meals which has become a major factor in their choice of convenience foods.



Keeping fat low profile

As an alternative to the conventional high calorie salad creams and dressings, Premier Foods first introduced the 'Waistline' brand on its low fat salad dressings but at the same time, maintaining their gourmet rich flavour.

The marketing success was immediate and prompted Premier to extend "Waistline" across their Crosse & Blackwell brand of canned foods.

To give the new range of products more shelf appeal Premier Foods Brand management decided to revamp with a new shaped can design to differentiate "Waistline" from other traditional and own label brands.



A Slimmer future for consumers

The "Hourglass" shape concept was selected and developed through close collaboration between Crown Technologies's innovation team and Premier Foods with the aim to give a more 'slimmer' feminine appeal. The features of the can perfectly compliment the food concept and together with a new logo, was the ideal choice.





“
Our aim is to create innovative shaped food cans which offer maximum brand differentiation without compromising their quality and integrity, while maintaining excellent performance in our customer plants and retail distribution chains.
 ”

Steve Thomas,
 Crown Food UK & Ireland.

Forming a future for steel

The proprietary metal forming technology, developed by Crown Technologies has successfully opened up new horizons for the steel can and is helping to put metal cans back as a packaging option for Brand design by Brand Designers. This particular example of creating brand identity for a specific product line using three-piece shaped cans was produced for Crosse & Blackwell at Crown Food Europe’s German plant in Seesen using a specific steel quality and expanding technique. The process still retains the protection and integrity of steel cans. Despite the packs unusual shape the contents can be filled and processed on conventional lines without any major equipment adjustments.

The attractive decoration using shrink-sleeve labels adapts ideally to the new slim silhouette with only slight line adjustments to achieve perfect alignment. The ergonomic design offers easy handling with the added convenience of EOLE III full-aperture easy open end.



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Interview with an expert

THE WAYS OF BUYING A PRODUCT... AND ITS PACKAGING!

What can we do to ensure that our product stands out in an environment saturated with signs? Let us analyse the four main types of consumer behaviour in the supermarket.



ABOUT GÉRARD CARON

Gérard Caron, the leading international design spokesman and founder of Carré Noir, the first design agency in France, has always sought to increase the renown of the design profession throughout the world. One of the initiators of the PDA, the "Pan-European Brand Design Association", he recently also created "admirabledesign.com", a web site dedicated to the various forms of graphic design, and a forum for exchange between design professionals.

www.admirabledesign.com

ADMIRABLE
DESIGN

How do we attract the consumer?

The answer lies mainly in the product's identity, its presentation, the clever ways it can be used... in a word, in its design. Its objective will basically be to open an area of desires in the consumer's imagination. The languages used by designers are in the realms of the irrational, in sensations, instinct, archetypes, and received ideas that bombard all individuals, and in particular the consumer pushing his shopping trolley or the executive in a car dealer's showroom! We know that consumers do not have a single form of behaviour when it comes to products. The irrational mixes with the rational to varying degrees according to the nature of the product and the circumstances surrounding the purchase...

The four types of purchasing behaviour

1- The functional attitude: The buyer only takes into account the purely utilitarian and functional aspect of the product. Any suggestion and any appeal to the imagination would be superfluous. In this case the buyer sticks to the product's functional value.

2- The analytical attitude: The consumer turns into a genuine professional buyer, himself inventing his own way of buying. He weighs up, compares, and analyses the quality, the performance, the prices, and the novelty factor. He decides freely and in full knowledge of the facts...or at least he thinks he does. The products of reference brand

names play an important part in this category. For all that, the advantages of the product's design are a decisive factor in the consumer's choice; insofar as they add to rational arguments.

3- The imaginary attitude: This is the attitude that links the products to certain fashion values and to new forms of behaviour, with strong consumer identification with the brand. Here, design can be linked to the impact of fashion, and an appeal to the senses is then a very important asset. Many products aimed at teenagers fall into this category.

4- The recreational attitude: The purchaser distances himself from his day-to-day life; he seeks pleasure, humour, a break with reality. This behaviour is obviously linked to impulsive "fun" purchases or exclusive products or gadgets...

The mechanisms of perception



Today everybody is aware of the fact that our brain is made up of two essential hemispheres: the left side, which houses our capacity for analysis - our masculinity, and the right side, which houses our faculty for synthesis and our emotions - our femininity. The art of the designer is to switch constantly from one to the other. The consumer will quickly decipher colours and shapes, knowledge of which is built early on in a child's development. Other elements such as counting and reading are incorporated after the formation of our nervous

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system, and consequently, texts and numbers are less vivid elements! We are talking here of a perception measured in fractions of a second, but that is decisive when it comes to making a choice from what's on the shelves, when you know that an average consumer covers a metre per second in a hypermarket, and that a single look can encompass sixty brand names in a second! Nowadays consumers devote an average of fifty minutes in the hypermarket, as opposed to ninety minutes fifteen years ago... You have to be quick and act on the consumer's senses as much as, or indeed more than, on his thoughts.

Always colour!

Colour is the most powerful of the visual languages at the designer's disposal. It has a twofold influence on the sense of perception, since it acts not only on our cultural references but also on our physiology. In 1996 on France 2, at the request of the producers of the programme *Envoyé Spécial*,

I asked forty consumers, selected at random in a supermarket, to taste two yoghurts and to say which they preferred. One was in a sky-blue pot, whilst the other pot was a horrible greenish-yellow colour. Thirty-nine opted for the blue



yoghurts which were said to be definitely "softer, creamier, more...". Of course it was the same brand and the same quality of yoghurt in the two pots!

Shape also has a language of its own

Some shapes will naturally be recognised as masculine and will adapt to packaging for energising products, shaving products, etc. Other shapes are said to be feminine, because they are protective, enveloping and reassuring. They are appropriate for dairy products, children's foods, cosmetic products, certain decorative items, the art of entertaining, and so on. The symbolism of shape, a complex language, leaves no room for error.

Colours and shapes are two languages that "dominate" us, since they address our subconscious. They represent a formidable power, which, if well used, is a success factor. We have seen that in their choices, consumers mixed the rational with the irrational. The same goes for the designer as he goes about his work. That is the surest way of creating all the more successful products on markets that are saturated...



GÉRARD CARON'S OPINION OF METAL PACKAGING

The metal can is "in"!

The metal can (steel or aluminium) is conquering new markets in the more developed economies. You only need to look at Japanese or American shelves to realise. The fashion is for metal packaging, not only for gift presentation boxes and vintage packs, but also for new cans (Japan is an excellent example) and other innovations.

In fact, a trend is taking shape in many markets in favour of metal packaging. Recyclable, light and decorative, they used to have the reputation of a certain lack of flexibility, which could limit creativity.

The good news is that designers are now having their say, since the technical production performance levels of these cans now permit a degree of creativity. There's more than plastic in life! Admirable Design is there to remind you of that. It is time that as designers we reconsider our positions in the light of the major developments in the sector.

Extracts from the web site: www.admirabledesign.com, the first French design web site.

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RESEARCH DEMONSTRATES CANNED FOOD IS A SUSTAINABLE TOP PERFORMER



The consumer is central

When in our modern society all kinds of products are brought onto the market for the greatest benefit of the consumer who has seen his choice increase dramatically over the years, APEAL, the Association of European Steel for Packaging Producers, wanted to assess from a consumer's perspective the sustainability performance of packaging. Indeed, the consumer is central. It is the consumer that buys the product, that prepares the meals he and his family will be eating and finally that has to dispose of the packaging in order to allow recycling or waste disposal to take place according to local conditions.

This approach where the consumer assumes a central position, also means a more society supported approach and enables APEAL to benchmark the steel food can packaging system against other systems from a sustainability viewpoint. This is the work that TNO, a well renowned Life Cycle Assessment expert company in The Netherlands has recently carried out for APEAL.

Commenting on the conclusions of the study Toon Ansems, project leader at TNO, said "In today's open market where the supply of foods is secured throughout the year amongst the systems analysed in our study the canned food packaging systems is a top performer in terms of eco-efficiency". When considering economic and environmental aspects, the canned carrots, the fresh bunched carrots and the frozen carrots in a plastic bag performed well, having comparable above average eco-efficiency, while vegetables in a food pouch, laminate carton or frozen in a carton performed less well.

Study boundaries

Carrots were chosen as an example of a well defined food product because carrots are available in a wide range of processing-packaging combinations.

The study analyses the carrots that are available on the Dutch market throughout the year, taking also into consideration the imported carrots.

The scope of the study goes from the cultivation of the carrots in the fields to the storage, preparation and cooking of the carrots at home by the consumer. The waste flow generated by the consumer has also been included in the study, taking into account not only the used packaging, but also the food that is lost in the process as well as the food the consumer throws away, simply because he doesn't always eat everything he has prepared.

All products analysed were bought in a large Dutch Albert Heijn supermarket.

In the case of laminate cartons and frozen products, the carrots were mixed with other vegetables.

For the environmental and economic assessments it was assumed that the packaging only contained carrots.

“

The study provides substantiated, independent evidence of the value that steel packaging brings to society, and specifically to the food sector, at an environmental, economic and nutritional level.

Antoon Ansems,
Project leader, TNO

”

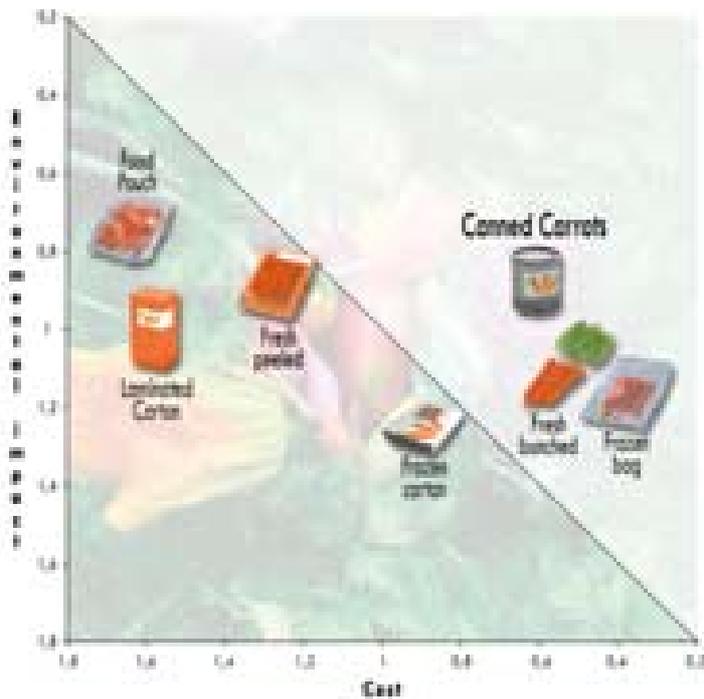
Functional unit

Placing the consumer in a central position also dictated the choice of the functional unit. The daily quantity (600 g) of vegetables recommended by the Dutch Centre for Nutrition for an average Dutch household of three persons was indeed chosen as the functional unit.

Methodology

The environmental impact of each step in the chain was defined according to 6 environmental themes that were chosen in accordance with today's political agenda importance, incorporating the crucial global warming criteria. These impacts were

ECO-EFFICIENCY OF FOOD PACKAGING SYSTEMS



measured for each of the 7 systems analysed. The LCA data used for the purpose of this study originates mainly from BUWAL 250 and JUNGBLUTH.

In a second stage these impacts were aggregated in order to get a global impact per environmental theme for each of the systems.

To aggregate the environmental impact to a single indicator, shadow prices were used. A variety of methods were nevertheless tested, but showed no significant differences in the results.

The cost analysis included the retail price of the product, costs of transportation from the shop to the home, storage, preparation and cooking. The cost for the product itself was the price at the supermarket, the other costs were calculated from average consumer prices for car usage, consumption of electricity and gas, drinking water and the average Dutch costs for waste treatment.

The eco-efficiency of the different systems analysed was determined for the Dutch market taking into account the environmental and cost impact of the imported products in order to reflect the reality of choices the consumer is confronted with throughout the year.

Key results of the eco-efficiency analysis

The graph shows the relative positioning of the 7 systems analysed. The canned carrots have a below average shadow cost, their environmental impact being lower than 1.

In terms of cost the canned carrots are below average, together with the fresh bunched carrots, the frozen carrots sold in a bag and in carton, their cost being lower than 1.

The value of canned food to society

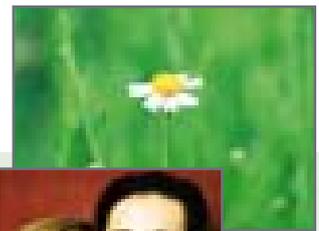
Canned carrots, fresh bunched carrots and frozen carrots sold in a bag have a comparable and slightly above average eco-efficiency. In a real market situation where consumers are confronted with a number of choices, in all seasons, canned food clearly stands out as one of the best performing packaging solutions.

It offers consumers a reliable product which they can trust, while also offering society the optimum solution in terms of sustainability.

In conclusion, European consumers and society benefit from the 25 billion steel food cans in the EU market place each year. When the first retorted food cans were brought onto the market, value was brought to society

because food wastage had been cut down. This value still exists and can be evaluated at 465 million euros per year in Europe by measuring the reduced environmental impact cans have enabled to reach as compared to what existed before.

The study provides substantiated, independent evidence of the value that steel packaging brings to society, and specifically to the food sector, at an environmental, economic and nutritional level.



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HÉNAFF ADOPTS CREASTEEL FOR IMPROVED EASY OPEN ENDS

The Hénaff pork pâté can is almost legendary amongst seafaring Bretons, not only for its quality and pure pork flavour but above all for its convenience and ease of opening. Jean-Jacques Hénaff has always stressed the importance of his product being available in virtually all situations and Hénaff was one of the precursors of easy opening devices. Hénaff Pâté is now distributed worldwide and Jean-Jacque's quest for innovative opening ends has recently been fulfilled with the introduction of CreaSteel, an original steel quality which makes can opening child's play.

Opening performance for CreaSteel

The introduction of 'CreaSteel' just over a year ago by Arcelor Packaging International, significantly increases the level of ductility and the capacity for elongation of packaging steel in comparison with the traditional materials used for Easy Open Ends and at the same time offers improved rheological properties.

This combination of improved properties make CreaSteel an ideal packaging solution for the production of round or shaped easy open ends and deep drawn cans with innovative and proprietary shapes for increased brand identity. Due to the high ductility and thin gauge of CreaSteel, the Easy Open Ends and innovative drawn containers made out of CreaSteel require the use of counter-pressure in retorting process.

CreaSteel for Easy Open Ends offers multiple advantages including a considerably lower tear force compared to other materials, with no spring-back effect during opening, which frequently occurs with shaped easy open lids. Maintaining efficiency in the seaming

process is also an important factor especially when using reduced thicknesses (the recommended thickness for CreaSteel is 0,17 mm).

Joining forces for convenience

Hénaff immediately recognized the advantages of CreaSteel and in partnership with a leading can-maker Massilly-Franpac and Arcelor Packaging International, established a development plan for the use of CreaSteel Easy Open Ends for the majority of their pâté cans.

Convinced of the importance of increased convenience for the consumer through improved access to their product, and thanks to a close and dynamic collaboration with their supplier Massilly-Franpac, Hénaff was able to introduce CreaSteel Easy Open Ends in twelve months for a complete range of products.

And the results were more than encouraging, with tear forces decreased by more than 25%.

«With CreaSteel, steel lids are as easy to open as aluminium ones and I am convinced that our consumers appreciate this improved convenience» concludes Jean-Jacques Hénaff, Managing Director of Hénaff.

Hénaff promotes increased opening convenience as a definite brand differentiator towards its customers.

The added value

One year after its introduction, Arcelor Packaging International's new CreaSteel has already found a viable industrial and commercial application for Easy Open Ends, permitting API to complete its steel product line for this application. Together with Maleis, a steel quality designed for the production of Easy Open Ends requiring high mechanical strength (sterilisation without counter pressure). CreaSteel is now available for round, profiled and shaped ends not requiring high mechanical performances for sterilisation with counter-pressure or for non-retorted applications such as milk powder or coffee.

CreaSteel's leading edge technology for the design of original deep drawn steel cans with creative formats and shapes should not be overlooked for the food packaging segment, whether for retorted or fresh food.

Hénaff cans with CreaSteel Easy Open Ends are already available in supermarkets and hypermarkets in France, and can be identified by a small logo «CS» on the lid.

By the beginning of 2006, production of all Hénaff cans with a diameter of 71,5 mm and 83,7 mm should have switched to CreaSteel.



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STEEL PACKAGING RECYCLING IN ITALY: "A SUCCESS STORY"

Giuseppe Russo, managing director, CNA and his assistant Antonio Russo.



Last year, the recycling of steel packaging in Italy reached about 57%, a tenfold increase compared to 1998 as a result of the excellent initiatives undertaken by the CNA (Consorzio Nazionale Acciaio). During a discussion in Milan with APEAL, Dr. Giuseppe Russo together with his assistant Antonio Russo, outlined the features of the collection and recycling system for steel packaging which has been implemented in Italy.

THE CNA, THE DRIVING FORCE BEHIND THE COLLECTION AND RECYCLING OF STEEL PACKAGING

IN ITALY

The CNA was set up in 1998 further to the adoption of the "Ronchi" Law, which imposed the implementation by local authorities of selective collection systems for household packaging and stipulated recovery targets to be reached by packaging producers and packaging users.

In an effort to develop an efficient system and to ensure the return of used packaging, the law stipulated the creation of consortia by type of material and the provision for the creation of a super packaging consortium, known as the 'CONAI'.

A challenge for household packaging

Giuseppe Russo stressed that when the CNA was established, everything still had to be invented. 'The recycling of steel packaging in 1998 barely reached 27,000 tonnes and in order to achieve our legal recycling target of at least 15% per material, the quantities to be collected had to be more than trebled'.

To reach these objectives, the CNA's priority was first and foremost to identify existing operators that were capable of handling, sorting and processing collected steel household packaging. Subsequently the CNA, through the CONAI, concluded national agreements with local municipalities for the implementation of selective collection systems. The CNA, in due course, guaranteed the return and processing of collected steel packaging using the service of approved scrap metal dealers.

...and Industrial Containers

In the case of industrial and commercial packaging, a somewhat different approach was adopted, with the granting of financial incentives. It allowed for the conclusion of a collective agreement between the CNA and Italian scrap dealers, represented by SARA and ASSOFERMET, as well as with independent scrap dealers. This ensured the systematic collection of all industrial packaging.

[1] Named after the Environment Minister at that time





STEEL PACKAGING RECYCLING IN ITALY: "A SUCCESS STORY"

Environmental contribution collected upstream in the chain

Rather than opting for a "Green Dot" inspired approach, whereby producers and importers of packed goods pay a fee by container weight, the CONAI chose to collect an environmental contribution upstream in the chain from packaging producers and importers. This would avoid the "free-rider" phenomenon, as experienced by other national recycling systems, that is, companies evading payments for the quantities of containers they placed on the markets.

An impressive evolution of steel packaging recycling

Thanks to the continuous action of CNA, the results quickly became apparent: in 2004, the recycling rate for steel packaging in Italy neared 55%, i.e., 324,000 tonnes of recycled steel containers – progress by a factor of 10 compared to the CNA's first year of operation. Since 2002, steel has exceeded the recycling objectives set at European level for metal packaging (50%) and therefore, contributes to the sustainable use of natural resources.



By the end of 2004, 52% of Italian municipalities participated in a selective collection system for steel packaging, representing a 67% coverage of the population in Italy. Today, some 170 operators cooperate with the Consortium in order to optimise recycling of collected steel containers.

Selective communications for selective sorting

In addition to setting priorities for the development of existing operational structures, the CNA will intensify awareness communication programmes directed towards Italian consumers through regularly organised campaigns using the general and specialist press together with Italian TV, to emphasize the importance of selective sorting with the objective of achieving a 60% recycling rate for steel containers by 2008.

Investing for the future

Schools are playing a major role in the level of awareness of young citizens to conservation and the preservation of our environment. In response to this future potential, the CNA has implemented two important educational projects corresponding to 'ACCIAIO AMICO' - 'School and Creativity' and 'ACCIAIO AMICO' - 'The Art of Recycling' to familiarize young people with the selective collection and sorting of steel packaging.

ACCIAIO AMICO - School and Creativity targets pupils in primary and secondary schools from the first grade and takes place every year in a different Italian province. After success stories in Genoa, Parma, Reggio Emilia, Naples and Salerno, the 2005/2006 edition will be organised in the Province of Bari.

ACCIAIO AMICO - the art of recycling is a project reserved for students of artistic secondary schools and art institutes. It is aimed at boosting creativity in young people in the field of contemporary art through the production of works of art made from recycled steel containers.

More information to be found on a dedicated website:

[www.acciaio-amico.org](http://www acciaio-amico.org)



www.acciaio-amico.com



CNA in action:

"STEEL AGE": FASHION DRESSED UP IN ... RECYCLED STEEL

An unusual fashion show with innovative and sensual clothes produced from steel accessories made from recycled steel packaging; created in 2001 in Milan and presented at the same time as the major stylists ("Milano Vende Moda")

"RICICLA SAPORI (THE RECYCLING OF SAVOURS)" - "IL GUSTO SEGRETO (THE SECRET FLAVOUR)" BY GIANFRANCO VISSANI

At the end of 2003, the specialist press and VIPs were invited to the "Ricicla Saporì" event, during which Gianfranco Vissani, the great Italian chef, created and produced refined dishes using products packed in steel containers.

The event drew the public's attention to the high quality of canned foods in the preparation of meals and to the recycling potential of steel packaging.

"COOKING CLASS WITH CANNED FOOD FOR VIPs - "GASTRONOMIC SUGGESTIONS FOR VIPs"

In 2004 the first cooking class exclusively dedicated to VIPs through a gastronomic journey, the discovery of culinary riches from steel food cans to cooked dishes, and the secrets of flavour.

"LA VIA LATTA" (THE "MILKY WAY" BUT ALSO "THE JOURNEY OF STEEL TINS")

In March 2005, a three-day journey through the most significant steps in the production to the recycling of steel containers, organised for journalists from the specialist press (packaging, environmental, distribution, consumer and culinary art).

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*International
Communication Programme*



"STEEL FOR PACKAGING: TRUSTED EXPERIENCE, VALUE FOR THE FUTURE"

The European steel for packaging industry has just launched a Europe wide, sequenced information programme to brand owners, retailers and designers on the values of steel packaging in the food sector. The programme was announced to the packaging press at a press conference that took place on the 3rd April, on the eve of the Amuga Food Tec in Cologne.

A recent survey conducted by Landell Mills regarding information needs of packaging and marketing decision-makers of major food brands in Europe brought to light that these would like to be kept informed about all the latest developments in steel packaging. To respond to this requirement, the European steel for packaging industry decided to develop an "Information Pack" series for brand marketers, retailers and packaging designers. Aim of this complimentary programme is to give a brief and concise overview of marketing and packaging trends, and how steel packaging responds to them.

This new programme contains facts, figures, market research and market trends, recent developments and other useful information, including where to find further data. It reconfirms the benefits of existing steel packaging solutions for brand owners and consumers, and informs about recent developments and innovations, focusing on

their added value from the brand owners' point of view. Four different themes covering the four main concerns shared by all players in the packaging chain: Convenience, Shelf Differentiation, Nutritional values, safety and protection, and Sustainability – are covered, one by one, in the series. And articles waste no time in getting to the point – they're designed to speed the reader through the contents in just a few minutes.

Participation in the programme is free-of-charge for brand owners, retailers and packaging designers, so if you're interested, you may register to receive it by filling out and sending us back the form below.

You'll then receive the first Info Pack of the series – CONVENIENCE -, and the following ones as soon as they are published.



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ISSUE N°27 - JUNE 2006

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Printed on recyclable paper



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