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PLATINUM® È IL NUOVO ELEMENTO  
CHE UNISCE I BENI DELL'ACCIAIO  
E DELLA PLASTICA



Paint

## Paint market push for polymer-coated

Newly-branded Protact® products impress the market

**P**rotact®, the Corus high performance polymer-coated steel, is ready to make a splash in the European paint market. Two European can-making companies are now marketing Protact®'s distinctive qualities under new brand names.



Gruppo ASA in Italy first began introducing its customers to Platinun®, its general line paint container made with Protact®, eight months ago. The company offers a 15-25 litre pail and a round one-litre and 500ml can. The introduction went well, according to Product Innovation and Development Manager Francesco Amati. In May, ASA announced its first major application for Platinun® in a range of paints by Lechler.

Francesco Amati says that to explain the Platinun® name is to explain its benefits. "It combines the twin components plastic and tinplate. The 'un' addition is a reminder that it is UN-approved for the transport of

dangerous substances. There is also the association with platinum. The link recalls the top quality and it is easy to remember."

Dutch company Pack2pack has also created new branding for its polymer-coated steel pails and paint can components: Pack2protect. "Pack2protect offers the dual advantage of plastic and tinplate – the best of both worlds," says Technical Manager Henk Schoone. Managing Director Chris Paelinck adds, "Pack2protect can be used for a wide variety of products, so customers can reduce the number of pail specifications." The company launched Pack2protect at Interpack in 2008 and customer trials are beginning. "We are emphasising that the polymer coating is VOC-free, leading to reduced CO2 emissions, and that the packaging is fully recyclable," says Purchase, Production and Logistics Manager John Linders.

Corus has fully supported these branding initiatives, assisting with marketing as well as technical advice.

Protact is already well-established in aerosols, fish cans and rings for peel-off ends. The new interest is in the paint pails and can components market, where it shows effective resistance to a wide range of fillings including water- and solvent-based paints, as well as aggressive paints and hard-to-hold chemicals.

### CONTACT

#### Francesco Amati

*Product Innovation and Development Manager*

Asa San Marino S.A.  
Strada dei Censiti 18-20 Falciano E6  
IT-47891 Repubblica San Marino  
Tel +378/90 52 75  
Email f.amati@gruppoasa.com  
www.gruppoasa.com

## Beverage

# The resealable drinks can has arrived



**I**n the last few decades countless brainwaves, concrete ideas, concepts and even complete projects to replace the standard ring-pull tabs on beverage cans have been presented to fillers of beverage cans and beverage can producers.



## Rob Miles, Vice President Sales & Marketing at Ball Packaging Europe in Ratingen (Germany):

'The phone call I got in February 2000 from Antonio Perra of the Dutch-based company Bound2B was different. When we sat together soon after, he presented a well thought-out concept for a resealable beverage can end in the form of a clear model. It was a good concept with basic merits but not a finished product by a long way. We agreed on a contract with Bound2B for the use of this patented opening solution'.

## From concept to working samples

Ball Packaging Europe first undertook market research in 2001 and 2002, the outcome of which was so positive that they appointed a project team and embarked on a major development effort. 'We had talked about resealability for beverage cans for more than twenty years, so we recognised the opportunity and this became an exciting project for us,' said Rob Miles.

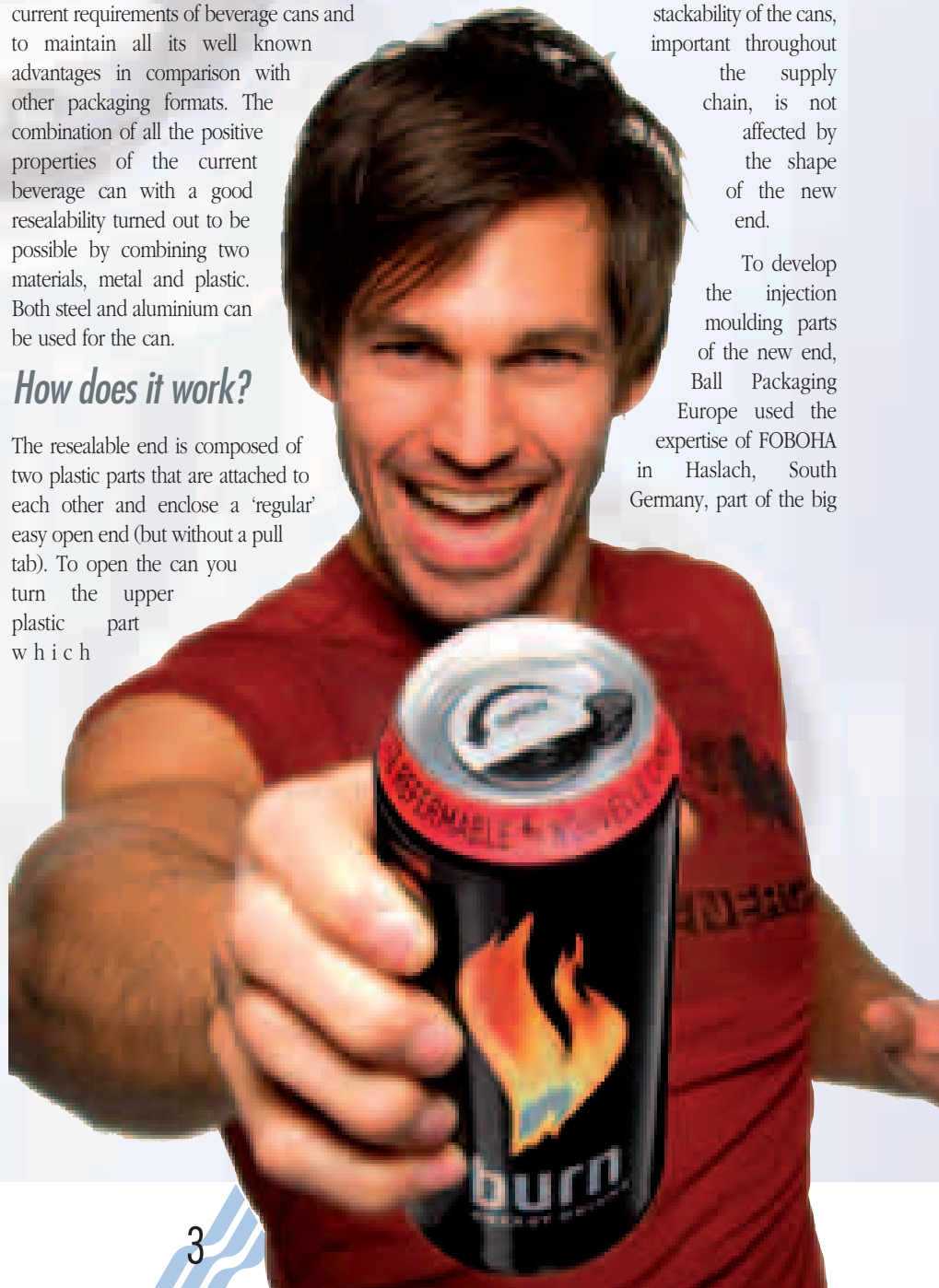
The starting point for the development of the new Ball Resealable End - the official name of the innovative end - was to keep fulfilling the current requirements of beverage cans and to maintain all its well known advantages in comparison with other packaging formats. The combination of all the positive properties of the current beverage can with a good resealability turned out to be possible by combining two materials, metal and plastic. Both steel and aluminium can be used for the can.

## How does it work?

The resealable end is composed of two plastic parts that are attached to each other and enclose a 'regular' easy open end (but without a pull tab). To open the can you turn the upper plastic part which

releases a clearly visible tamperproof button. A light twist of the plastic part recloses the end very easily. The stackability of the cans, important throughout the supply chain, is not affected by the shape of the new end.

To develop the injection moulding parts of the new end, Ball Packaging Europe used the expertise of FOBOHA in Haslach, South Germany, part of the big





## *Beverage*

# The resealable drinks can has arrived

Swiss Adval Tech Group. After substantial testing, various grades of polypropylene were selected. The aluminium shell and the plastic parts for the new end are assembled on the FOBOHA plant.

## *Rolling out the reclosable end*

There have been several more extensive market tests with the new end to determine how much confidence consumers would have in the system.

Rob Miles: 'Once properly closed the end does not leak. And even when you re-close the end 30 times it still functions perfectly. Of course there is a learning process for consumers to acquire real trust in the system. But that was also the case for consumers who used PET bottles for the first time in the 1980's. After all we have seen, we have great confidence that the consumer will be quickly convinced that this is a reliable and most of all very convenient opening and re-

closure system. We ourselves were quite happy that the opening forces of the new system are quite low and very consistent. And you can easily open the end with only one finger or your thumb'.

## *'We found our perfect partner in the Coca-Cola Company'*

In parallel to the technical development work, Ball Packaging Europe realised they would need a major soft drink or beer company to help exploit the full potential of the new opening concept. Ball Packaging Europe talked to people right at the top of Coca-Cola in Atlanta and they indicated that they wanted to be part of this development, and proved to be the kind of company Ball Packaging Europe were looking for, in terms of scale, portfolio and commitment. The innovation implied substantial investment on the part of Ball Packaging Europe, but also by the brand owner, necessitating the adaptation of filling lines and investment in technical and commercial tests.

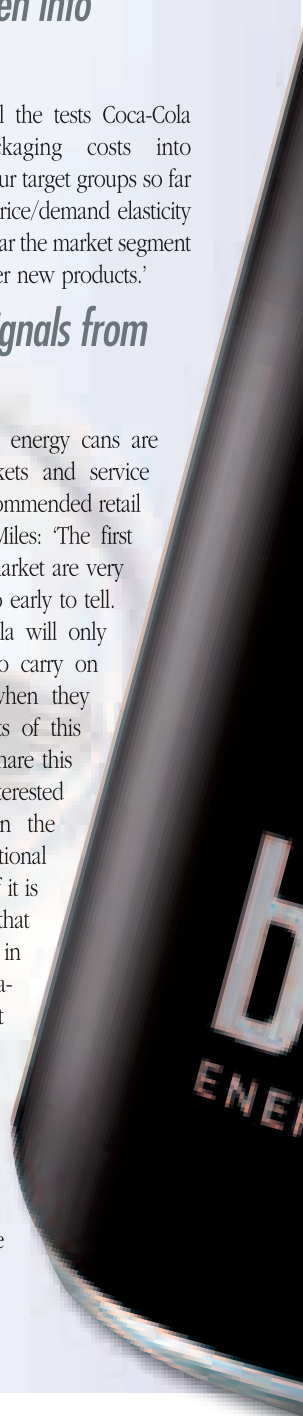
Rob Miles added, 'Extensive worldwide research undertaken by Coca-Cola in 2006 in Hong Kong, London, Rio de Janeiro, demonstrated the consumer's enthusiasm for the resealable can. We were able to see for ourselves the potential value of the resealable solution, in instances where consumers are on-the-go or are outside with little access to drinks in various volumes'.

## *Were the additional costs for the new end taken into consideration?*

Rob Miles: 'Indeed, in all the tests Coca-Cola took the higher packaging costs into consideration. However, our target groups so far are segments where the price/demand elasticity is relatively low, in particular the market segment for energy drinks and other new products.'

## *Promising first signals from the market*

The 50cl resealable Burn energy cans are being sold in supermarkets and service stations in France at a recommended retail price of 2 Euros. Rob Miles: 'The first signals we get from the market are very promising but it is still too early to tell. It is logical that Coca-Cola will only decide how they want to carry on with this new feature when they have evaluated the results of this major launch. They will share this information with other interested markets of Coca-Cola in the world and then these national organisations can decide if it is the kind of innovation that they want to introduce in their market as well. Coca-Cola are of course present in the whole world and we made sure that we are able to provide them with these new ends all over the world when and where they may want us to do that. And we are quite optimistic!'





## THE VIEW OF COCA-COLA

APEAL talked with Chris Bowers, Packaging Innovator at Coca-Cola Europe, about the development of the resealable can.



*Chris Bowers,  
Packaging Innovator  
at Coca-Cola Europe*



### *How important is the resealable development for Coca-Cola?*

Coca-Cola is always looking at ways to bring new packaging options to people and we test many ideas and seek feedback. We have many consumers who prefer the drinking experience of cans over bottles and therefore we work hard to improve that drinking experience just as we do with plastic bottles.

### *Will you be using the resealable can for special types of products, special sizes, special target groups?*

Certainly it will be of most interest for use on larger size packages, on-the-go usage occasions and for products that can support a little extra material cost for the convenience of a can with a resealable lid.

### *Are you happy about the results of the market test in France?*

I can tell you that the packaging is meeting our sales expectations and we're pleased with the initial consumer response to the resealable feature on the Burn can in France.

### *Are you planning a further roll-out of this resealable can with other products and/or in other countries?*

We evaluate what's relevant according to each local business market so certainly the Burn resealable can will be shared with interested markets and they can determine if it's an innovation that's appropriate for their business.

#### CONTACT

##### **Rob Miles**

*Vice President of Sales & Marketing*  
Ball Packaging Europe  
Holding GmbH & Co. KG  
Kaiserswerther Straße 115  
DE-40880 Ratingen  
Tel +49/2102-130 501  
Email [rob\\_miles@ball-europe.com](mailto:rob_miles@ball-europe.com)  
[www.ball-europe.com](http://www.ball-europe.com)



Food

# Premium quality food comes in cans

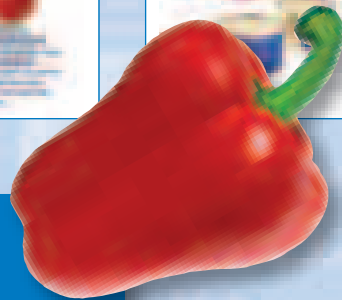
**S**ince the launch of its range of gourmet canned food products in New York in 2005, the Taste® Group has regularly appeared on the culinary pages of newspapers including 'The New York Times'. APEAL interviewed Allegra Brosco, founder and owner of the Taste® Group, to find out the background to the launch of this premium range of canned vegetables, seafood, fruit and nuts in steel packaging.

## Bringing canned foods to the gourmet aisle

Allegra Brosco: 'In 2001, having spent a year researching Taste®, it struck me that there was the potential to create new, high quality gourmet food products in cans, to bring something different to the sector. I teamed up with Dana Giacchetto and New York designer Serge Becker. Together we developed a striking but minimalist graphic design for the existing can. The result was a blue label with

limited text featuring the registered brand Taste®. We were convinced that the combination of this sleek new look and the high quality food would define our lifestyle brand - ALL NATURAL LUXURY™. The next step was to get this brand on the shelves, containing the best quality canned food in the world.'





“

*It is the combination of a new design, superior product and the advantages of canned food packaging that contribute to making the difference. Bring the ordinary to a higher level and something extraordinary is born.*

Allegra Brosco,  
Founder and Owner  
of the Taste® Group

”

## Guaranteeing freshness & quality

Allegra Brosco: 'I found perfect vegetable products in cans in Italy for example. Among others, I selected San Marzano DOP plum tomatoes, grilled mixed vegetables, canned cherry tomatoes, grilled eggplant and grilled zucchini for Taste's first line. I also found delicious canned seafood products for the seafood product line, including Nova Scotian lobster, Chilean baby clams, Dungeness crab meat and Chinook Salmon. For all our products, our rule is to use only natural ingredients'.

The 20 existing Taste products within the line do not contain artificial ingredients or preservatives and have been packed by regional artisan farmers and fishers who use only natural preservatives like seawater, salt and natural citric acid, which is found in lemons. The canning process helps guarantee the freshness and quality of the product packed.

## Successful launch

After a successful test launch in late 2005, the Taste® Group introduced its products in some of the larger supermarket chains like Kroger, Ralphs, Whole Foods and specialty retailers like Central Market / HEB in Texas. Since then, sales have been progressing, rising by 30% in 2007. Gross Sales are projected to be in excess of \$ 3 million in 2009.

Allegra Brosco: 'At the moment we are still focusing mainly on the USA but we get a lot of interest from the UK, Mexico, Brazil, Israel and other countries. It is the combination of a new design, superior product and the advantages of canned food packaging that contribute to making the difference. Bring the ordinary to a higher level and something extraordinary is born'.

## CONTACT

### Allegra Brosco

Managing Director  
THE TASTE GROUP, INC.  
108 Wooster Street, Suite C2  
NEW YORK, NY 10012  
Tel +1 212 431 7516  
Email [info@tastegroup.com](mailto:info@tastegroup.com)  
[www.tastegroup.com](http://www.tastegroup.com)



*Award*

## Award “Tous en boîtes !”



**G**IE BCME La Boîte Boisson has been active in promoting the drinks can since 1992, contributing positively to the development of the drinks market in France. Now linked with the European network BCME (Beverage Can Makers Europe), BCME La Boîte Boisson provides all its skills and wealth of experience particularly in consumer research and merchandising but also in dynamising the drinks can markets in collaboration with key actors.

In 2007, members of GIE BCME La Boîte Boisson launched a national design packaging awards programme. The aim of this challenge was to develop innovative design concepts for beverage cans. More than 100 students from 6 French schools specialised in packaging design or packaging engineering took up the challenge of looking into the future and designing next generation innovative cans, as part of the «Tous en Boîte!» Award. Participating schools included CEPE (European Centre for Packaging), Strate Collège Designers, Institut Supérieur de Design, Ecole Supérieure d'ingénieurs en Emballage et Conditionnement, ESEPAC (Une Ecole d'Entreprise) and Ecole des Mines de Nancy.

Students had various tools at their disposal to support them in the development of their projects, including documentation and on line experts, a dedicated website and teaching support. Fabrice Peltier from the design agency P'Référence, Alain Préham of beverage can maker Crown Bevcan, as well as Michel Dollé of Heineken Entreprise guided the students and offered expertise in their particular field.

Launched at the beginning of October 2007, the Awards Ceremony took place on 15th May 2008, during the 9th Ceremony of the 'Trophées de la Boîte Boisson' in Paris.

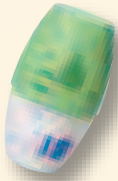
“

*What a pleasure to find so many ideas linked to the can. The students have really identified levers for growth for the drinks can. The majority of the projects went relatively far in terms of marketing strategy.*

”

Matthijs Jansen,  
Sales Director, Rexam Beverage and  
President of BCME La Boîte Boisson.





## TOP PRIZE : B!POP, THE DRINK OF 1001 FLAVOURS

Two elements are required to produce a 'diabolo' drink: syrup and lemonade. B!pop offers an individual packaging composed of 2 elements: a can containing lemonade and a polymer beaker lid containing the right quantity of syrup. This enables each user to mix his drink according to his own taste.



## STRATEGY & MARKETING PRIZE: MILKISS

Milkiss is a really modern « emergency » product, specially designed for mothers wishing to prepare a bottle for their child when they are on the go. Containing ready made formula milk, this canned drink is self heating.



## GRAPHICS & PACKAGING PRIZE: MOO

Often consumers hesitate to open a carton or a bottle for one single use, knowing that they will not finish the product completely. The objective of Moo is to overcome waste by proposing a small volume of natural or flavoured milk (25 cl). Moo is presented in an original, shaped milk churn or a cow's udder, immediately communicating the contents of the package to the consumer.



## PACKAGING INNOVATION PRIZE : CATTIER, CHAMPAGNE 'HAUT COUTURE'

Developed for champagne house Cattier, the design resembles the elongated silhouette of a champagne flute and is decorated to reflect the high class, premium quality of the product.



## PACKAGING INNOVATION PRIZE : BE ONE, SHARE THE EXPERIENCE

The objective of 'Be One' is to initiate a new trend in consumption for couples. 'Be One' offers 2 different drinks: a strong energy drink for men and a milder energy drink for women. This original concept would be ideally suited for pubs, bars and night clubs.



### CONTACT

#### Jean Sicard

*Délégué Général*

BCME La Boîte-Boisson

79, rue Martre

FR-92 210 Clichy

Tel +33 1 47 30 52 85

Email [contact@gielbb.com](mailto:contact@gielbb.com)

[www.tousenboite.org](http://www.tousenboite.org)

## Steel Packaging Gallery



[www.steelforpackaging.org](http://www.steelforpackaging.org)

# Inspiring Steel Packaging Solutions

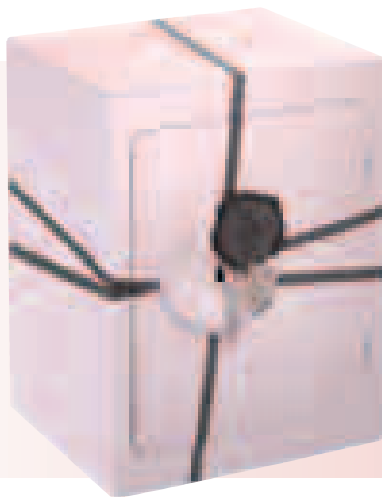


[www.steelforpackaging.org](http://www.steelforpackaging.org)

## SLIM CANS FOR DOURO OLIVE OIL



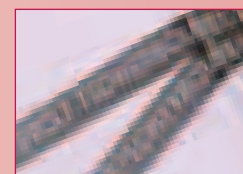
Brasilata has launched three slim cans for edible oils. The 25 cl, 50 cl and 75 cl cans have a spout to allow the oil to be poured out directly. Since the cans are slimmer and smaller in diameter, they are more comfortable to handle, making it easier for the consumer to pick up and serve from during meals. The product has a low rate of oxidation and does not need preservatives, because the steel packaging provides a 100% barrier to light and keeps the oil in optimum consumption conditions.



## VIKTOR & ROLF "SAFE"



As a special Valentine's promotion, Viktor & Rolf by l'Oréal presented their Flower Bomb and Antidote perfumes in a unique steel 'safe' manufactured by Virojanglor. This decorative box is a true object of collection and prestige which can be re-used by the end-user and so promotes the brand's image for years. The steel material as well as the real lock and key add to the authenticity of the safe. The ribbons, another distinctive sign of the brand, are elongated perfectly from one side of the box to the other. Their ribbon texture is simulated thanks to delicate embossing.



## LATA LACTA SPECIAL



Steel egg shaped can for chocolate. The Easter Lacta Special is a chocolate egg released by Kraft Foods in Brazil this year. The egg contains 200 grams of milk chocolate mini eggs. The packaging was produced by Tapon Corona.





## BOLLING COFFEE FORTNUM & MASON ANNIVERSARY COFFEE TINS



A sophisticated, reusable container has been specially designed for the re-launch of Fortnum & Mason's premium coffee range to mark the company's 300 year anniversary. The side welded steel can features a ring pull and seamed end, plus a gasket in the lid and a metal clasp for resealing. Incorporating hermetic sealing technology to ensure product freshness, the commemorative packaging sports a fashionable design which enables Fortnum & Mason to convey a high-end look at the retail shelf. The package won a Gold Award in Best Food Design in the Starpack Awards 2008.



## EYE-CATCHING WAVE-EMBOSSSED TIN FOR GODIVA BISCUITS



Huber Decorative has developed an eye-catching packaging for Godiva's latest biscuit collection, underlining the premium image of the brand. The surface of the lid in caramel colour is equipped with wave-like embossing and complemented by soft colour shades. The gold and dark blue Godiva logo and lettering in the middle of the lid are also embossed. Finally, the coating of gold particles underlines the high-value look of the decorative container.



## TRULLO OLIVE OIL



FALCO S.p.A. has developed a 5 litre tinplate container for oil incorporating a tap for dispensing. The objective was to offer a new look packaging for olive oil for domestic and professional use, at the same time offering best performance in terms of resistance, communication and recycling. The packaging helps protect against oxygen and light, so preserving the nutritional values of the olive oil and ensuring maximum quality for the consumer. For the industrial user, due to the excellent resistance to light, it is easy to maintain the quality of the oil. The lightness of the packaging means transport costs are significantly reduced.

## Inspiring Steel Packaging Solutions

### MORE INFO

Would you like  
to know more about all these  
steel packaging solutions?

Please visit:  
[www.steelforpackaging.org](http://www.steelforpackaging.org)

## *Innovation*

# Silgan shapes up its food cans

**S**hape communicates instantly; no reading is required. Shape creates memorable and recognizable branding'. Observations like these, underpinned by solid consumer research, led Silgan Containers to recently launch its Sculptured Metal® Technology programme. These observations become even more important because it is proven that on average a product on a supermarket shelf has only 3 seconds to catch the consumer's attention and in these 3 seconds a striking package can make the difference.

## ABOUT SILGAN

Silgan Containers Corp., a subsidiary of Silgan Holdings, is the largest manufacturer of metal food containers in the USA with approximately half of the US unit volume in 2007. It had \$ 1.68 billion net sales in 2007.







“

*It's clear that marketing communication has moved from advertising to the shelf. Most of the time, your packaging statement is going to determine whether or not your product stays on the shelf or ends up in the shopping cart.*

”

Carolyn Takata  
Director of Marketing,  
Silgan Containers Manufacturing

## *The importance of shape for Silgan*

Carolyn Takata, Director of Marketing at Silgan Containers, is therefore quite explicit about the motives to start this shaped can making programme.

Carolyn Takata: 'Independent research shows that 68% of the buying decisions are made at the point-of-purchase. It's clear that marketing communication has moved from advertising to the shelf. Most of the time, your packaging statement is going to determine whether or not your product stays on the shelf or ends up in the shopping cart. Our own consumer research showed us that consumers perceive shaped metal containers as communicating increased quality in relation to what is contained inside the package'.

## *Why Silgan Containers introduces Sculptured Metal® Technology now*

Carolyn Takata: 'As the leading U.S. manufacturer of metal food cans, Silgan is always looking for ways to add value or differentiate our product offerings. And of course brand owners, our customers, are constantly looking for ways to differentiate their products on crowded shelves. At the same time, technologies have evolved in recent years which have enabled shaped can production efficiencies and quality – in both

steel and aluminium - to compare favourably with traditional metal. Both premium-niche and high-volume shaped cans continue to enter the global market place. In many cases, these launches are achieving sales increases through product differentiation and enhanced functionality'.

## *Silgan is investing considerable effort in its Sculptured Metal® Technology programme*

Carolyn Takata: 'We have dedicated multi-discipline resources to achieve the desired objectives. And we are working today with brand owners on developing shaped cans. We see Sculptured Metal® Technology as a perfect example of how a manufacturer can work directly with a packager to create a custom can which provides the desired visual cues and also meets performance and production criteria. There are a broad variety of shapes that can be executed, depending on what kind of visual cues are needed to support the product. We have no plans to develop 'stock' shaped metal cans at this time. We work in partnership with our customers to develop the shapes that best communicate their brand. Sometimes we develop the new shape internally and other times we work with industrial designers to execute what our customer requires'.

When asked about specific shaping technologies and the impact of shaping on the cost of the can, Carolyn Takata is not able to be very specific.

Carolyn Takata: 'As far as technology is concerned, we are using a proprietary technology at this time. Regarding the cost of shaped cans in comparison with straight walled cans, clearly a standard metal can is

the most efficient to produce, and any alteration to it will mean it will be available at a value-add price. The price differential depends on the complexity and size, but it is clear that a shaped can offers added value to a product. Our Sculptured Metal® Technology represents the latest approach in metal can innovation that we are proud to offer our customers. Since it is more of a value-added product, we believe that it is ideal for those customers who want to make a strong shelf statement. It provides an ideal alternative for a product to gain attention while benefiting from the strong performance and sustainability characteristics that metal cans offer.'

### CONTACT

**Carolyn Takata**  
Director of Marketing  
Silgan Containers Manufacturing  
Corporation HQ  
21800 Oxnard Street, Suite 600  
US-91367 Woodland Hills, CA  
Tel +1/818 710 2420  
Email [ctakata@silgancontainers.com](mailto:ctakata@silgancontainers.com)  
[www.silgancontainers.com](http://www.silgancontainers.com)



## *Food Information Campaign*

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

# Convenience, microwaveability & sustainability of the steel food can recognised

**I**n November 2005, APEAL launched a Europe-wide, sequenced communication towards brand owners, retailers and designers on the values of steel packaging in the Food segment. A study by Landell Mills had revealed that many players in the market want to receive more information about steel packaging. Hence the initiative to launch a new "Information Pack" series campaign under the header 'Steel for Packaging - Trusted Experience' to provide brand owners, retailers and packaging designers with a brief and concise overview of new marketing and packaging trends, containing facts, figures, market research and market trends, recent developments and other useful information, including where to find further detailed data available on-line via the APEAL web site and other industry websites.

## *Positive impact on the image of the industry*

The campaign had a positive impact on the overall image and perceptions of industry in the view of brand owners and designers. Recipients appreciated the regular, sequenced nature of the campaign, which contained 'relevant information' delivered in a short, concise format, was 'very customer oriented', 'efficient' and 'useful'. The appreciation of the packs had an impact on the perceptions of the industry. In particular, brand owners' perceptions of the industry evolved

significantly on parameters such as 'innovative', 'commercial', 'concerned about the problems of the brand owners', 'better R&D', 'up-to date' and 'flexible'.

## *Sequenced Information Programme*

The information packs were sent to almost 3000 decision-makers in over 20 countries. Four different themes covering the four main concerns shared by all of the players in the packaging chain - Convenience, Brand differentiation, Nutritional values, safety &

protection, and Sustainability - were covered, one by one, in the series. A supplementary insert on Microwaveability was also circulated. Each Info Pack contained an easy reference index of contents and 3 main topics: the Bottom Line (the main issues - in a nutshell), Market Trends (the latest news, facts & figures from the international consumer research front) & Case Studies (innovation in practice - backgrounders to recent new developments and case studies.)

## *Evolution in the perception of the steel food can*

Shortly after the last information pack was sent out in December 2007, an independent survey was undertaken amongst a representative sample of 307 brand owners, retailers and designers from 13 European countries contacted randomly by telephone. The survey revealed the high impact of the pack, as well as the awareness and perception changes it generated.

When requested to explicitly evaluate a number of characteristics of the steel food can, the interviewees demonstrated the shift in their perceptions relating to several key characteristics since receiving the information



## INFO PACK 1: CONVENIENCE

Highlights the range of new convenience features being offered by steel for packaging in response to changing consumer needs (consumption on-the-go, busier lifestyles, snacking). Special focus on easy open ends, peel off ends, re-closure, single-serve.

## INFO PACK 2: SHELF DIFFERENTIATION

Highlights the full potential for shelf differentiation through packaging by reviewing shaping, embossing, printing and decorative developments and techniques.

## INFO PACK 3: NUTRITIONAL VALUES, SAFETY & PROTECTION

Factual and emotional aspects - including 3rd party testimonials - of the outstanding properties of steel packaging when it comes to protecting, preserving nutritional value and ensuring the safety of the contents.

## INFO PACK 4: SUSTAINABILITY

Demonstrates steel's outstanding sustainability performance, and the eco-efficiency of canned food compared to other packaging systems.

## SUPPLEMENT MICROWAVEABILITY

Reveals the outcome of an independent study by the renowned Fraunhofer Institute for Process Engineering and Packaging. Under normal conditions of use, shallow and wide open steel containers are safe to be used in microwave ovens.

packs : 'is microwaveable' (shifting from – 2.8 to 2.1 from before to after the campaign), 'is convenient' (shifting from 2.2 to 4.4), 'has exceptional barrier properties' (shifting from 2.8 to 4.1) and 'is a sustainable solution' (shifting from 3 to 4.1). The easy opening opportunities of the can were apparently already well known, hence the increase is relatively small (from 3.1 to 3.8).

## EXPLICIT EVALUATION "TRUSTED EXPERIENCE 2008"

### Steel packaging...

	AFTER	BEFORE
is convenient	4,4	2,2
allows shelf differentiation	4	3,6
is safe, protects and preserves nutrients	4,8	4,2
is a highly sustainable packaging option	4,1	3
is microwaveable	2,1	-2,8
is easy to open	3,8	3,1
exists in various sizes and volumes	4,9	3,7
has exceptional barrier properties	4,1	2,8
is reclosable	4	2,1
allows for single serve	3,6	3,4

*Remark: Maximum score = 5 / 307 respondents contacted randomly by telephone (brand owners, retailers, designers in 13 European countries) / Source: ITC Research*

**STEEL  
FOR  
PACKAGING**

**TRUSTED  
EXPERIENCE**

*The 4 Information Packs (Convenience, Brand differentiation, Nutritional values, safety & protection, Sustainability, and Microwaveability) are available on request from APEAL (Email: [j.mellese@apeal.be](mailto:j.mellese@apeal.be)).*

*Survey*

# Euromonitor survey results: Growth opportunities for food packaging in steel

**A**PEAL commissioned UK based international market research institute Euromonitor International to conduct a qualitative survey amongst key food brand owners in Europe. The aim of the research was to identify the main food and packaging trends as perceived by European brand owners, to assess how these will impact packaging choices, and establish areas of potential growth for steel packaging.



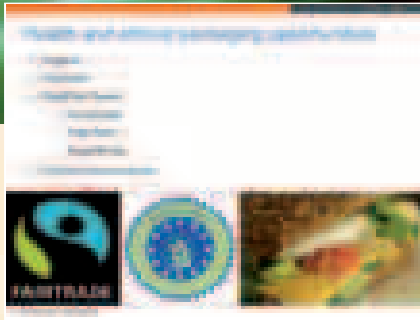
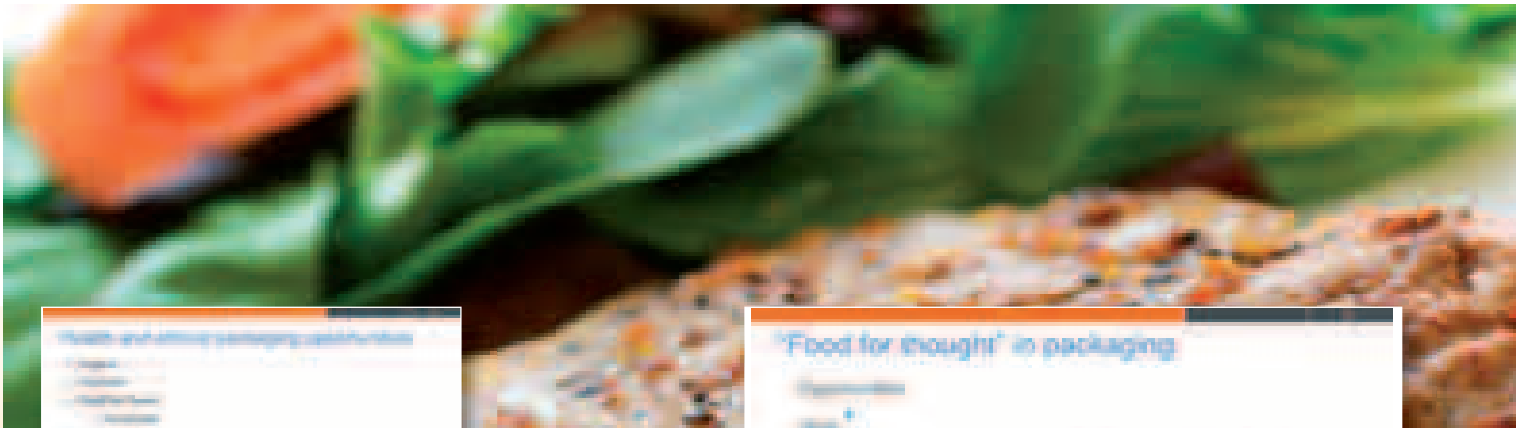
## *Major consumer trends: health consciousness, convenience & busy lifestyles*

The study first revealed that for the food market, two main consumer trends have an impact on packaging. The first trend is the growing demand for convenience & busy lifestyles. A third of all western European meals are purchased in restaurants or 'take away' outlets. Minimal time is spent on food preparation, and eating 'on-the-go' is becoming more prevalent, with 22% of West Europeans eating or drinking in the car. Easy to prepare meals are becoming the main driver of packaged food.

In addition, health and environmental concerns are increasingly important for the consumer. This trend, added to demand for higher convenience, is causing a double digit growth in chilled prepared foods. There is also strong growth in ready meals and sauces, 22.8% of these segments are packed in metal packaging. When considering chilled and ready meals, canned and preserved foods are currently at almost 27 billion units and projected to reach 28.8 billion in 2012.







## Packaged food growing in Europe

Packaged food is a large and growing market. In 2007, 552 billion food packs were sold in Europe. By 2010, an estimated 591.6 billion packs will be sold. The top five countries (Germany, Russia, the United Kingdom, France and Italy) account for 60% of all packaging consumption on a unit basis. The United Kingdom, France, Russia, Spain and Germany account for 66% of metal food can consumption. Packaging is growing slightly in Western Europe and strongly in Eastern Europe, thanks to increasing wealth, while higher emphasis is placed on convenience as consumers can afford it.

## Growth opportunities for Steel Packaging

In an overall growing European food market, the main areas of growth for the steel can that have been identified by Euromonitor are:

- Eastern Europe and more specifically Russia with a dramatic increase of 12% foreseen between 2007 and 2011, despite a declining population;
- The condensed products segment for which the steel can is particularly well adapted. Steel would in this case be even contributing to the retailers' global "packaging-product weight reduction" targets in the UK;
- Single serve and re-closable packaging, two areas in which the can has been able to deliver cost-effective solutions to the consumers, often in combination with other materials.

### CONTACT

#### Jackie Mellese

Market Research Assistant

APEAL

Avenue Louise, 89

BE-1050 Brussels

Tel +32/2 535 72 01

Fax +32/2 537 86 49

Email [j.mellese@apeal.be](mailto:j.mellese@apeal.be)

[www.apeal.org](http://www.apeal.org)



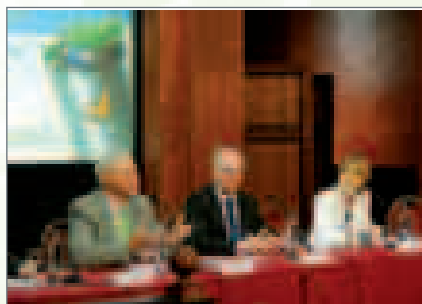
*Sustainability*

# Steel for packaging industry launches its sustainability positioning

**T**he European Steel for packaging industry officially launched its sustainability positioning in Brussels, showcasing its unique position as an enabler for a sustainable 21st century. The event took place in the Grand Hall of the beautifully preserved Bibliothèque Solvay building, located in the heart of the European quarter in Brussels. The event brought together EU decision-makers, NGOs, academics and journalists. It was followed by a debate entitled "Sustainable packaging: confronting myths with realities" gathering high-level speakers from EU Institutions, Business Community and Civil Society. In the context of the Sustainable Consumption and Production Action Plan (SCP), key issues such as the optimal use of natural resources, CO<sub>2</sub> emissions and recycling were discussed during the panel.



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100% recyclable  
100% protective  
100% sustainable



The steel for packaging initiative was timely in the context of the Sustainable Consumption and Production (SCP) Action Plan due to be released by the European Commission shortly. It addressed some of the key issues likely to be contained within it including the optimal use of natural resources, the role of recycling and the lowering of CO<sub>2</sub> emissions.

APEAL's Managing Director Philippe Wolper: "The launch of the 'Steel for packaging Naturally' positioning in the presence of some of our most important stakeholders shows the growing confidence and industry cooperation in communicating the role our material can play in a sustainable future for our society. In the forthcoming months we will further reach out to all the actors of the packaging market."

During the panel discussion, Julian Carroll of European, the European Organisation for Packaging and the Environment, urged the Commission to include the whole supply chain in its strategy. "In order to move towards more sustainability, everybody should be on board, from raw materials producers through to end users. Shared responsibility, supply chain cooperation, legal transparency and uniformity are indispensable factors to achieve a high level of sustainable consumption", he declared.

Martin Reynolds, Vice President Public Affairs Crown Europe, announced the joint industry initiative to develop a carbon number for metal packaging that meets ISO standards for lifecycle analysis. "The model will soon be launched and will allow canmakers to calculate the carbon footprint of their products."

In addition to steel's sustainability performance already achieved naturally, Philippe Wolper announced the European steel industry's ambitious investment in long term R&D to come up with breakthrough technologies to decrease CO<sub>2</sub> emissions per tonne in steelmaking even more drastically than the 50% reduction in emissions already achieved over the last 40 years.

You can download the "Steel for Packaging... Naturally" brochure from the APEAL website [www.apeal.org](http://www.apeal.org).



#### CONTACT

##### **Joris Nachtergaele**

*Public Affairs Manager*  
APEAL

Avenue Louise, 89

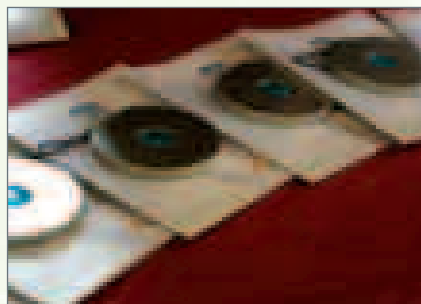
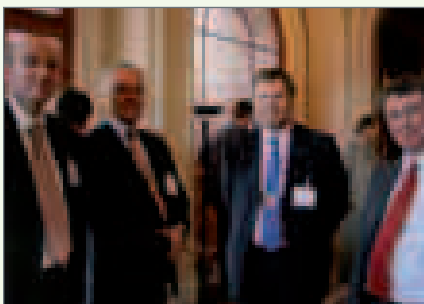
BE-1050 Brussels

Tel +32/2 535 72 06

Fax +32/2 537 86 49

Email [j.nachtergaele@apeal.be](mailto:j.nachtergaele@apeal.be)

[www.apeal.org](http://www.apeal.org)





## Sustainability

# Sustainability? It's Second Nature for Steel

Steel's natural properties - magnetic, infinitely recyclable, 100% protective, and naturally strong - make it a unique enabler for sustainability...



*Naturally®*

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Thanks to its natural properties, steel - infinitely recyclable - is the world's most recycled material, contributing to the lowering of CO2 emissions.

### Protecting Products... *Naturally®*

Steel is robust and offers 100% protection against light, water and air. It therefore preserves naturally and offers the highest packaging integrity.

### Delivering for Business... *Naturally®*

Steel is the most reliable and eco-efficient packaging solution offering a trusted experience for business operators.



## APEAL NEWS READERSHIP

### Circulation

**13 000 copies in 86 countries**

Brand Owners (44%), Institutions (16%),  
Can Manufacturers (11%), Retailers (8%),  
Steel Industry (5%), Journalists (5%),  
Consultants (4%), Packaging Designers (2%),  
Equipment Makers (1%), Others (4%).

### Languages available

English, French, German, Spanish

## ISSUE N°32 - DECEMBER 2008

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Concept Design: PAVY - [www.pavy.be](http://www.pavy.be)

Printed on recyclable paper



**The Association of European Producers  
of Steel for Packaging**

Avenue Louise 89 • BE-1050 Brussels

Phone +32/2/537 91 51 • Fax +32/2/537 86 49

E-mail: [info@apeal.be](mailto:info@apeal.be)

[www.apeal.org](http://www.apeal.org) • [www.steelforpackaging.org](http://www.steelforpackaging.org)

REPLY FAX - +32 2 537 86 49

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