



**TRUSTED EXPERIENCE
VALUE FOR THE FUTURE**

Packaging as a marketing driver.

**Philippe Wolper
Managing Director
APEAL**



1. Euromonitor research amongst key brand owners
2. Intrinsic values responding to trends & requirements
3. Major technology developments
4. Co-operation throughout the chain
5. Steel packaging sustainability



Consumer trends continue to drive packaged food market...

- ❑ Convenience and busy lifestyles
- ❑ Growing wealth
- ❑ Health concerns
- ❑ Ethical consumers



...opening packaging opportunities in convenience.

- Single serve
- Semi-prepared
- Microwaveable
- Convenience opening in Eastern Europe
- Re-closable containers

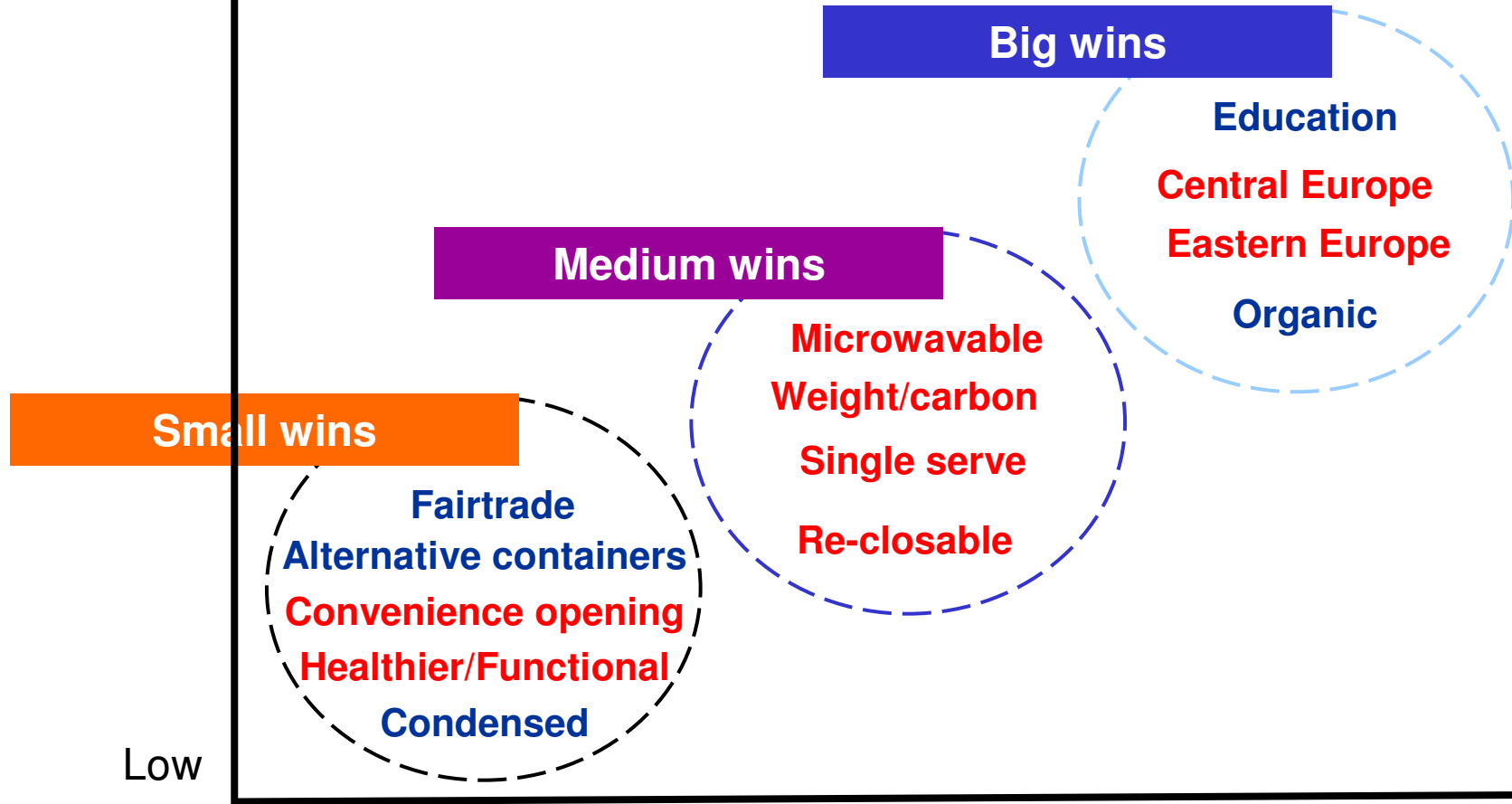


Which packaging opportunities?

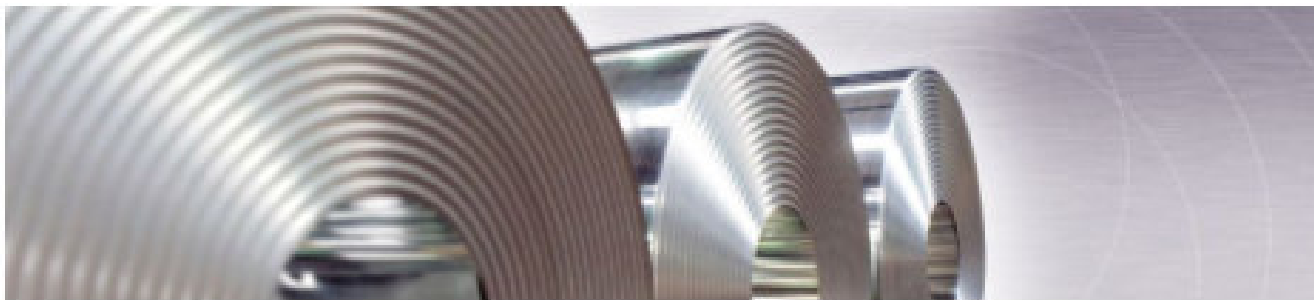
Opportunities

High

Low



2. STEEL'S INTRINSIC VALUES RESPONDING TO TRENDS & REQUIREMENTS



DO WHAT WE DO WELL.

Deliver:

- ***Processing efficiency***
- ***Production flexibility***
- ***Reliability***

Steel for packaging






Steel packaging: highly effective throughout the supply chain...



Filling speeds

for 400ml soups from major European brand owners

1		Steel can	500 units/minute
2		Rigid Plastics	30-400 units/minute (according to filling system)
3		Glass	300 units/minute
4		Carton	30-100 units/minute (according to filling system)
5		Pouch	30-70 units/minute (according to filling system)

Source: Industry expert



... and highest reliability.



Failure rate of closing devices

1		Steel can	1/1,000,000
1		Glass	1/1,000,000 (excluding glass breakage)
2		Pouch	1/10,000
2		Carton	1/10,000
2		Rigid Plastics	1/10,000

Source: Industry expert



CONTINUOUS DRIVE FOR IMPROVING PACK PERFORMANCE.

- ***Protect & Preserve:***

- *Robustness*
- *Mark resistant*
- *Safe containment (aggressive products)*
- *Barrier properties (light & air)*
- *Excellent product quality*



- ***Convenience:***

- *Easy to open*
- *Make life easier*
- *Re-sealable*








High performance in **barrier properties** and...



Oxygen intake

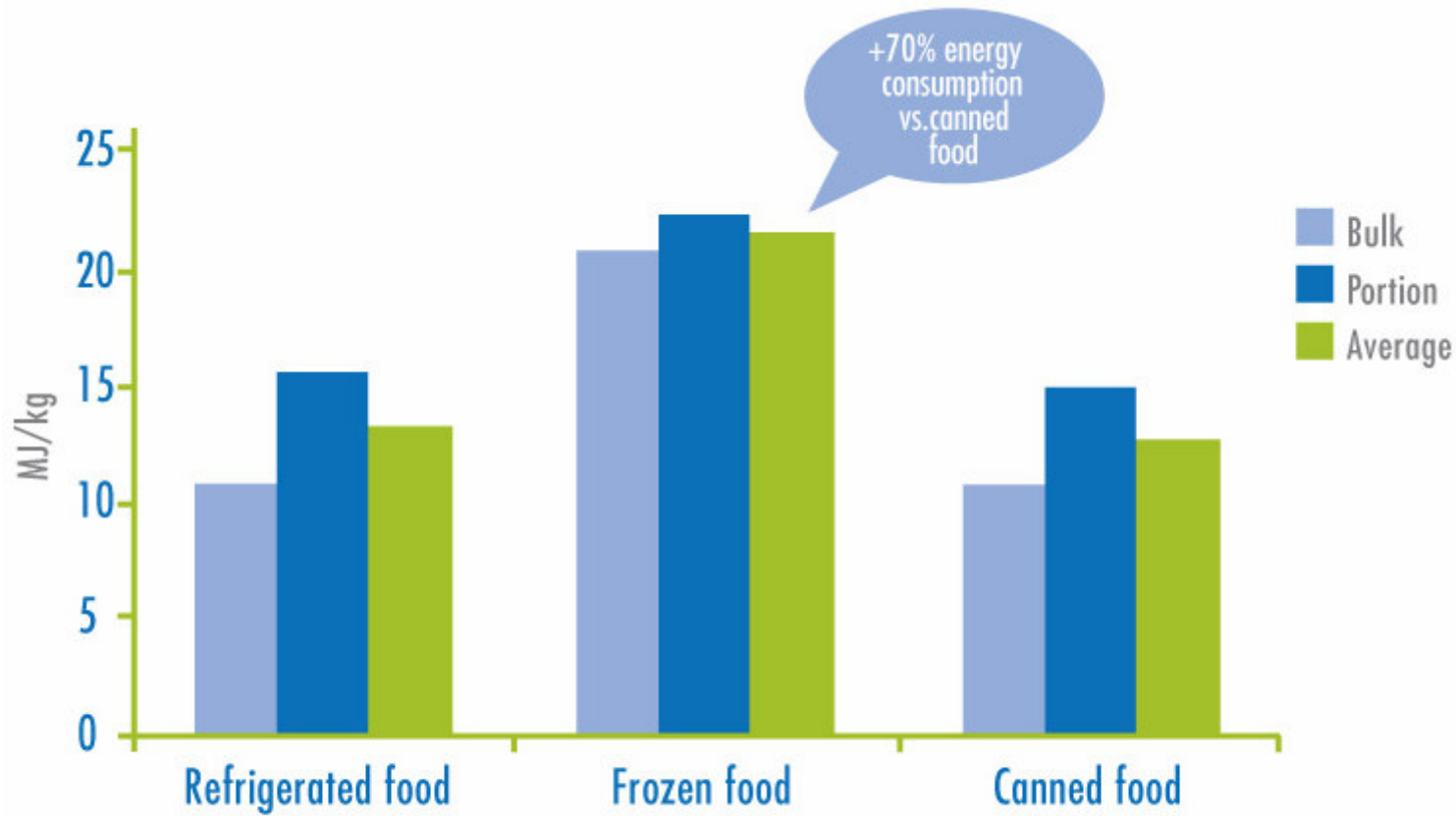
measured in $\text{cm}^3/\text{m}^2/\text{day}/1 \text{ bar atmosphere}$, for 100 microns thickness of packaging

1		Steel can	0 + total LIGHT barrier
1		Glass	0
2		Pouch	<0.1 (with aluminium foil) 17.4 (with EVOH)
3		Carton	<1
3		Rigid Plastics	1,000

Source: Industry expert



...efficient **energy free preservation** throughout the supply chain.



Source: Scientific Certification System (scs)



BUILD NEW BUSINESS.

Grow:

- *New can formats, brand differentiation*
- *New product delivery (convenience)*



PROVEN MARKET SUCCESS!



3. MAJOR TECHNOLOGICAL DEVELOPMENTS & STRATEGIC INNOVATION

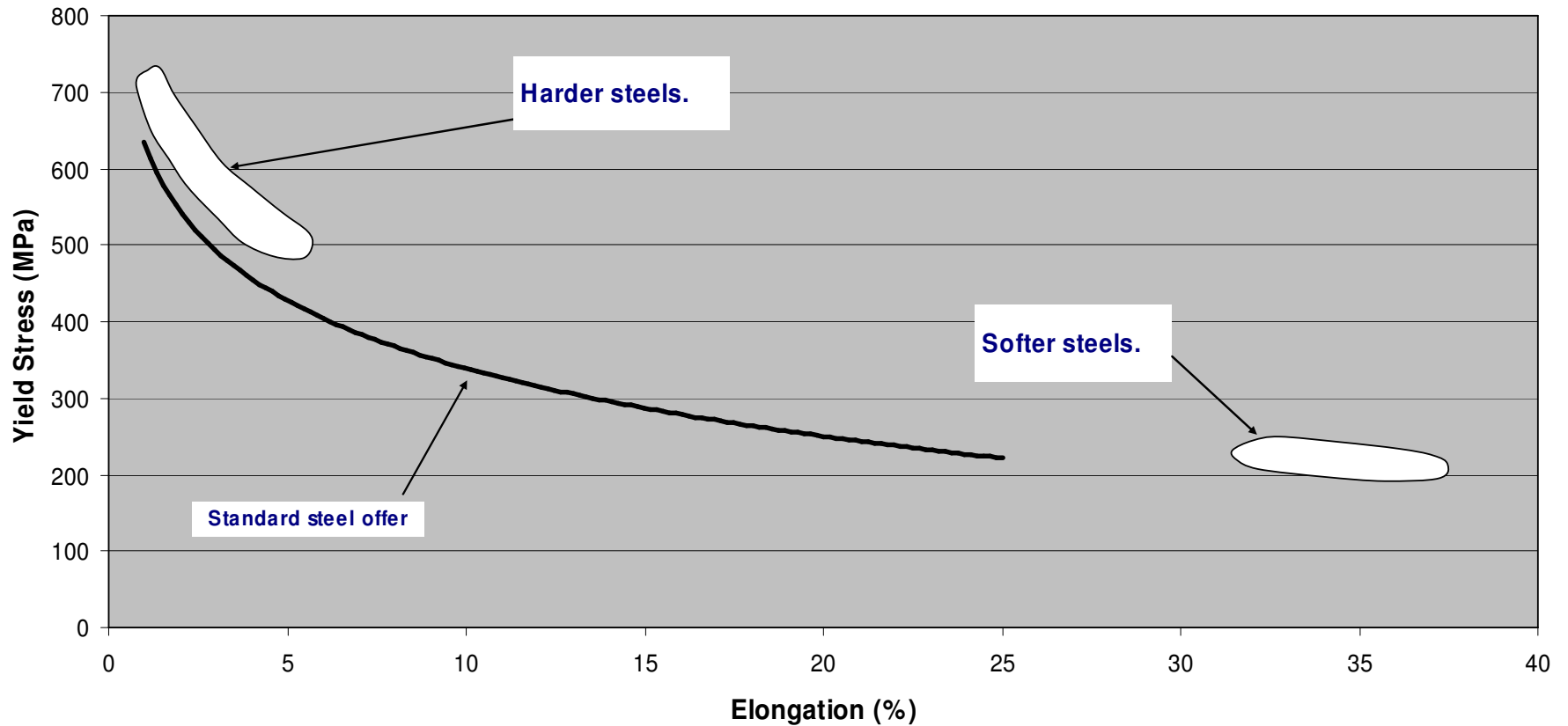


Key areas of technological developments & strategic innovation in steel for packaging:

- 1. Development of new steel grades**
- 2. Polymer coated steels**



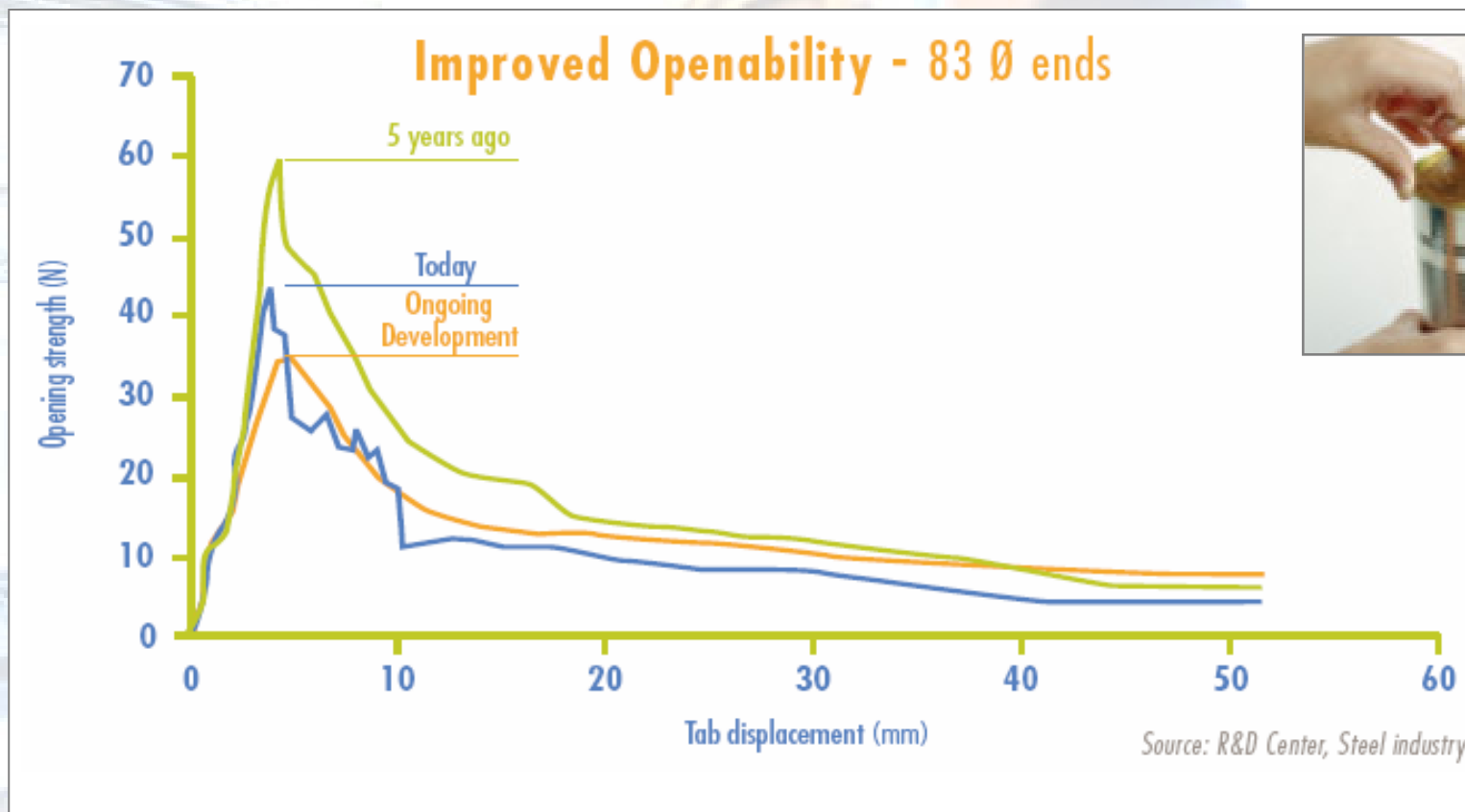
Development of new steel grades...



Source: R&D Center, Steel Industry



...allow for **easier opening**...



The latest Easy Open Ends require 25%-40% less force to open

...which some brand owners use as **brand differentiator**.



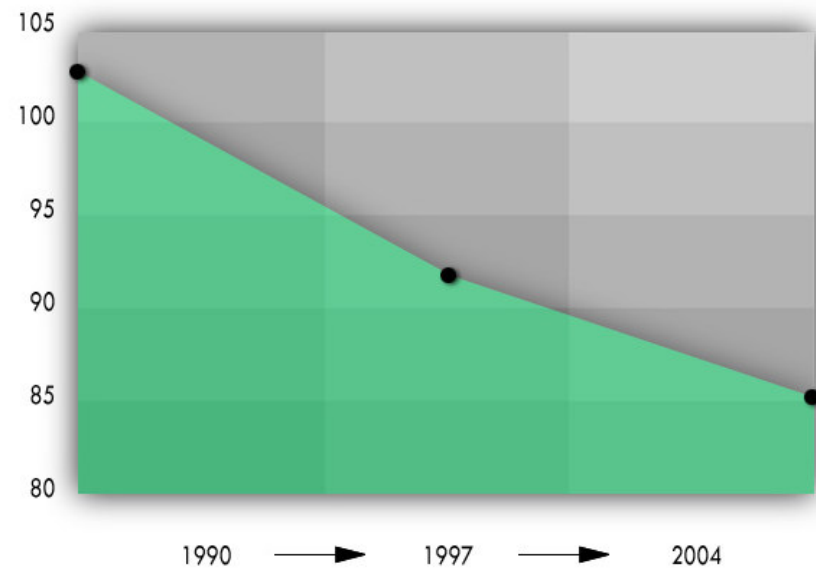
New steel grades also allow for continued light-weighting...

High-strength steel grades offer:

- ***Down gauging potential***
- ***Energy saving and low carbon footprint***

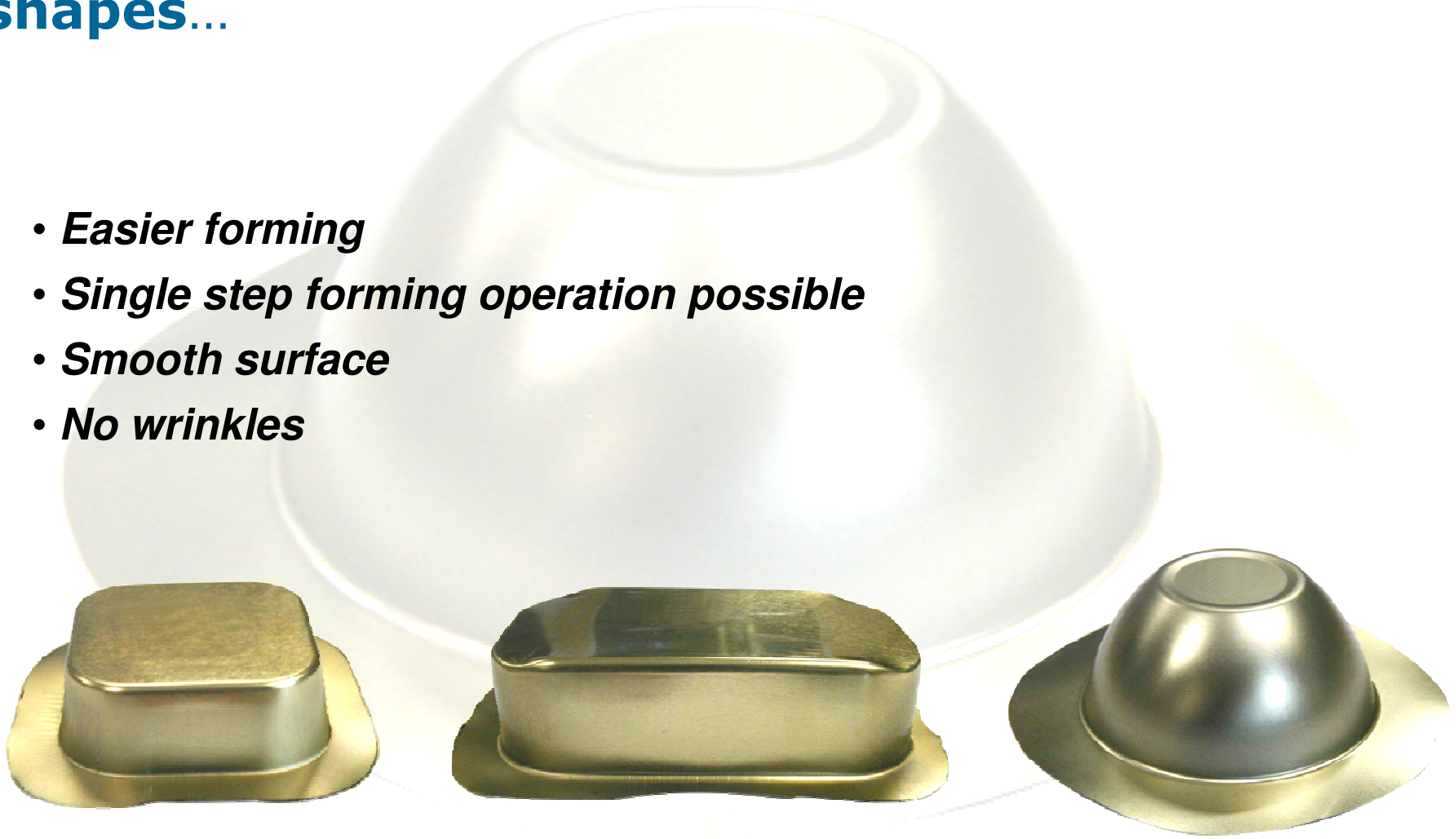


Steel food can 850ml body weight (in gr)



...and for easier manufacturing of more **sophisticated shapes...**

- *Easier forming*
- *Single step forming operation possible*
- *Smooth surface*
- *No wrinkles*



Square can
High conicity 8°

Rectangular can
High drawing ratio

Bowl
Luder's line free



...which respond to consumer trends...

« **Microwave** heating of food
in **metal packaging** »



...and allow for differentiation on shelves.

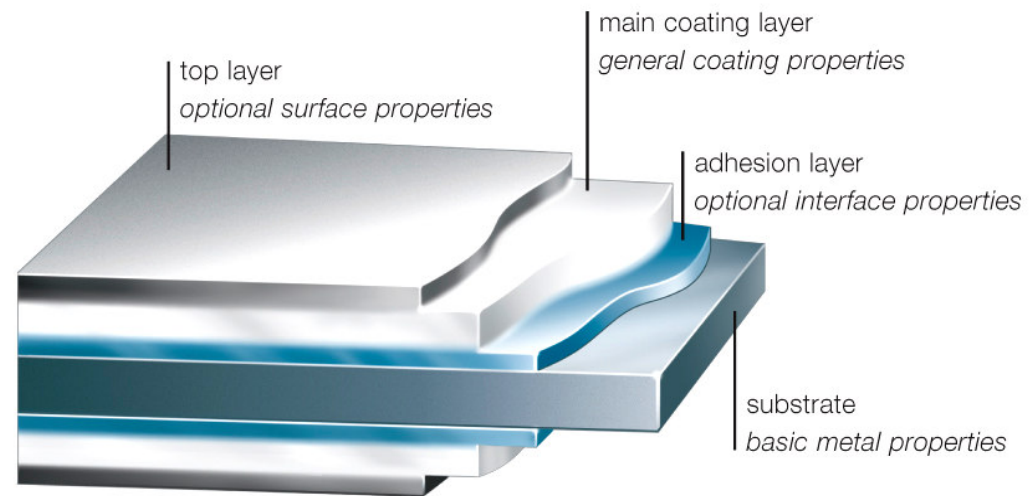


Polymer coated steels allow for:

- **Corrosion protection**
- **Chemical resistance**
- **Increased flexibility**



Example:



Source: R&D Center, Steel Industry



4. CO-OPERATION THROUGHOUT THE CHAIN



Informing and educating food can users at national level.

> **CANNED FOOD UK - UK**
www.cannedfood.co.uk



Off the shelf!
A parents' guide to feeding kids quick, nutritious meals!
Celebrity TV chef James Martin



Canned Food UK
nutrition locked in - naturally

Celebrity TV chef
James Martin

> **DIE DOSENKÖCHE - GERMANY**
www.die-dosenkoeche.de



Die Dosenköche



> **UPPIA - FRANCE**
www.uppia.org



Ouvrez-vous aux vitamines.



Ouvrez-vous à la saveur.

UPPIA

LA CONSERVE. Le meilleur est à l'intérieur.

> **CANNED FOOD ALLIANCE - USA**
www.mealtime.org



Canned Food Alliance
Canned Food.
The Easy Way to Eat Right.



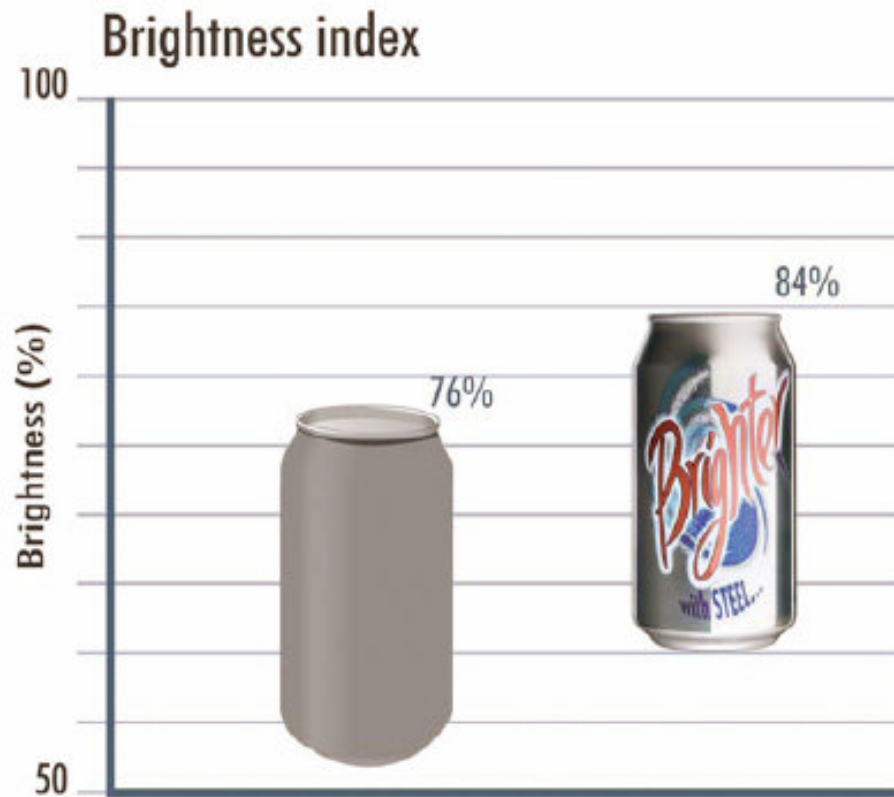
Mealtime.org



homemade in a hurry

Andrew Schloss

Co-operating downstream to optimise brightness level in production process.

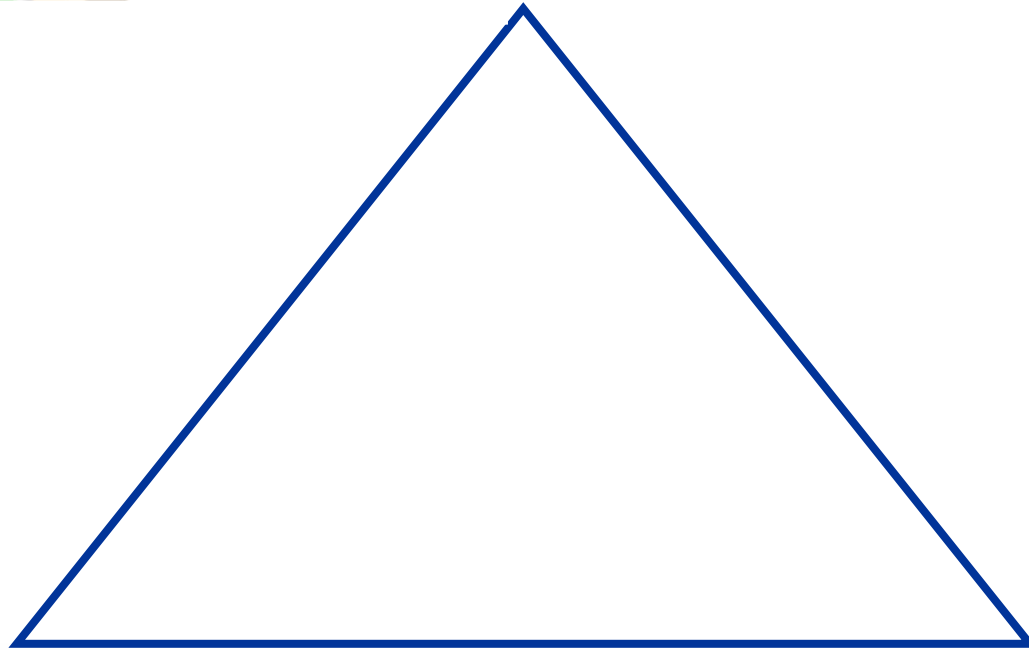


Collaborating to respond to downstream questions.



WAL-MART'S
Sustainable Packaging
SCORECARD
Education

TESCO



 **Empac**
European Metal Packaging

 **APEAL**



 **APEAL**

Researching jointly on new opportunities.

« Microwave heating of food in metal packaging »





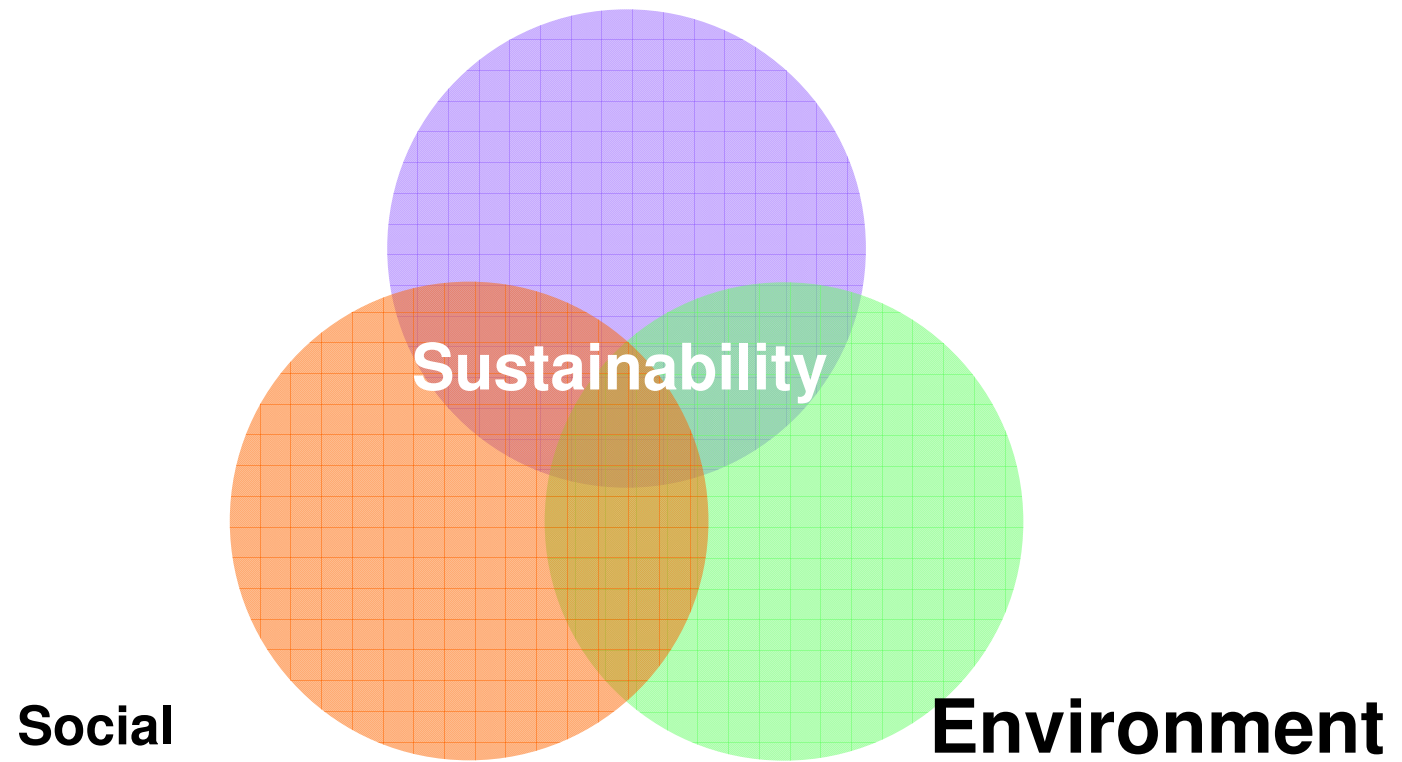
MAGNETIC SORTING



INFINITELY RECYCLABLE

5. STEEL PACKAGING & SUSTAINABILITY

Economic



Social

Environment



EXPLOIT SUSTAINABILITY CREDENTIALS.

Capitalize:

- ***Magnetic***
- ***100% renewable***
- ***High recycling rates***

Packaging steel is an enabler for sustainability!



RAW MATERIAL CONSUMPTION REDUCTION & ENERGY SAVINGS.



➤ **4,8 million tonnes iron ore**

➤ **1,7 million tonnes coal**

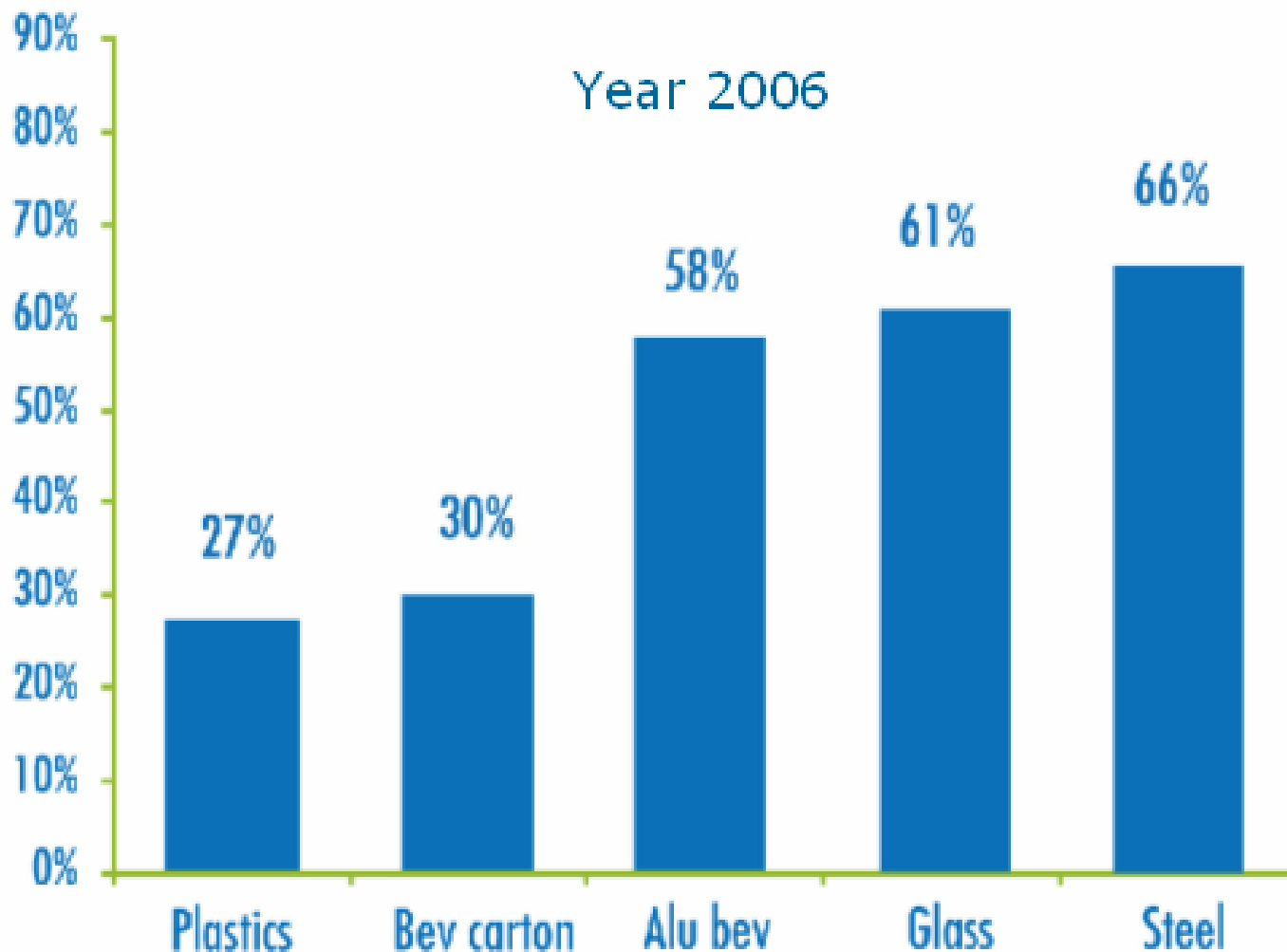
➤ **4,7 million tonnes CO₂**

➤ **Up to 70% energy saving**

(savings from steel packaging recycling EU27, 2006)



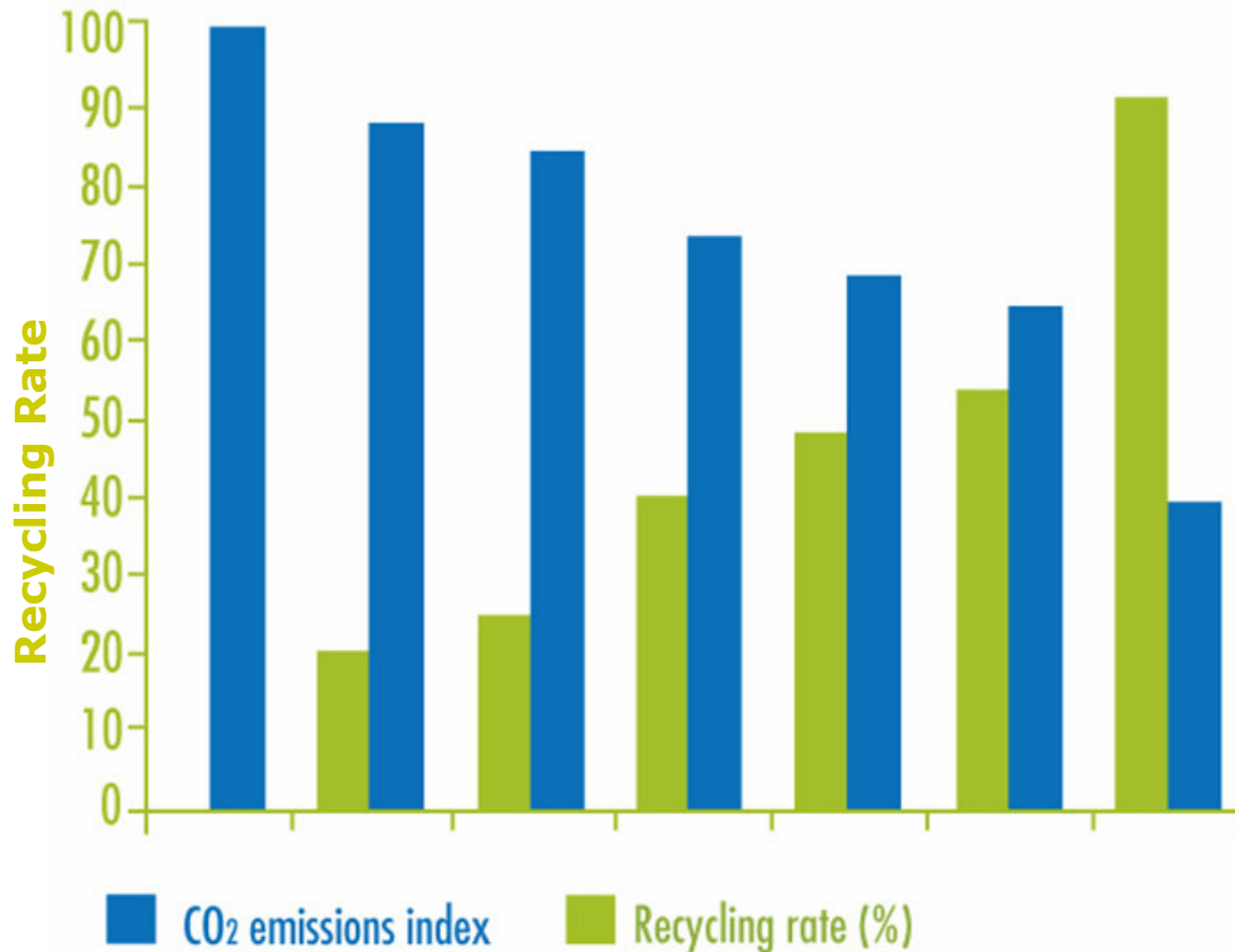
Steel packaging reaches **high recycling** rates in Europe...



Source: Industry expert Association of European Producers of Steel for Packaging (APEAL)- European Aluminum Association (EAA), European Glass Packaging Federation (FEVE) - PlasticsEurope



...which considerably **reduces CO₂ emissions...**



Source: APEAL

**More re-cycling
less CO₂**



Caring for the environment...

Naturally

- Magnetic sorting, highest recycling
- Eternally recyclable
- Higher recycling, lower CO2
- Saving resources & energy



STEEL
FOR
PACKAGING
Naturally



STEEL
FOR
PACKAGING

Naturally®



Thank you

