

1st half of 2015

EUROPEAN TUBE MARKET STABLE DESPITE DIFFICULT BUSINESS ENVIRONMENT

Despite experiencing difficult economic conditions, European tube production remained stable in the first half of 2015. The member companies of etma, the European tube manufacturers association, reported almost the same total production in the first six months of the current year as was reported for the first half of 2014.

"Overall, demand can be seen as positive," says etma Secretary General Gregor Spengler. "Production remained at the previous year's level despite the ongoing financial crisis in Greece, some economies in the eurozone continuing to flag and the uncertain situation in Russia and the Ukraine with its associated economic sanctions. Overall, this result is therefore satisfactory and it fills me with confidence regarding the future development of the European tube market. I also interpret the expectations of most member companies as being cautiously optimistic."

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TUBE OF THE YEAR 2015

ETMA COMPETITION DEMONSTRATES OF EUROPEAN TUBE INDUSTRY'S INNOVATIVE CAPABILITY

The winners of the Tube of the Year 2015 award were chosen during this year's conference of etma, the European tube manufacturers association. From the entries submitted, a qualified jury from the ranks of the association's member companies selected winners in the Aluminium Tube, Plastic Tube, Laminate Tube and Prototype categories. "The competition is an impressive demonstration of the creativity, innovativeness and capability of the European tube industry and provides important stimuli for further development and the acceptance of the tube as a packaging material in the market place," says etma secretary general Gregor Spengler explaining the significance of the award. "It is a valuable source of inspiration for packaging professionals and customers and allows them to recognise important trends." Besides tubes that are eco-friendly and produced in a sustainable manner, the particular trends this year were novel application systems and closures together with really unusual and stunning developments in design.

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The lower-than-expected economic growth in the so-called BRIC countries will hardly have any effect on demand because the lion's share of etma members' tube production remains in Europe.

The shares of the individual end-user markets for tubes showed barely any change. Demand from the toothpaste sector was somewhat stronger than during the corresponding last year's period. However, all other important tube markets, such as the cosmetics, pharmaceutical and food industries and industrial and domestic applications, reported only marginal changes. Laminate tubes showed a positive development compared with the first half of 2014, whereas demand for plastic tubes declined slightly. Production figures for aluminium tubes remained almost unchanged year-on-year.

Although overall the sector is still satisfied with the stable demand, the prices for individual raw materials and other materials are definitely giving cause for concern according to etma members. In particular the prices for the

plastics used (PE and PP) have increased strongly since the beginning of the year. Among the reasons for this were some cases of plastics producers invoking force majeure clauses. These led in part to considerable delivery bottlenecks and as a consequence to marked price increases for laminates, plastic granules and last but not least for closures and caps as well.

"The trend towards ever smaller lot sizes and shorter ordering and delivery times is also continuing," observes etma President Dr Monika Kopra-Schäfer. "At the same time, clients are placing ever greater demands on the design, decoration and finish of the tubes. Nevertheless, as we have shown impressively in previous years, which were not easy years either, the European tube industry is well positioned here. Our etma member companies in particular were able to further develop their good position by means of more efficient production, investments in innovative technologies and continual optimisation of process chains."

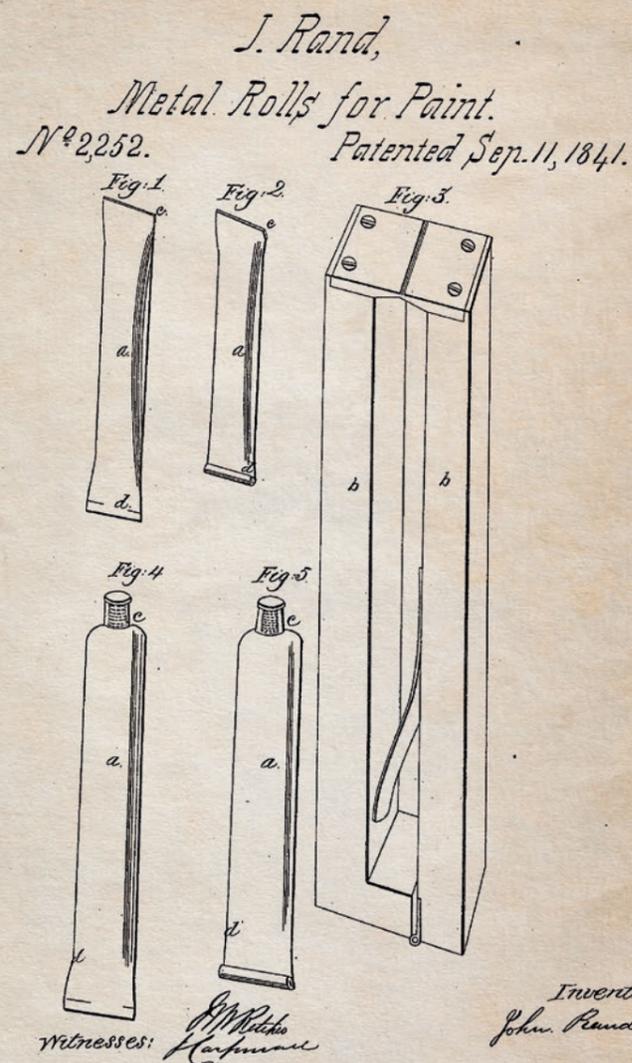
TUBE OF THE YEAR 2015



175 YEARS OF FLEXIBLE TUBES – AND STILL GOING STRONG

2016 will be the year when it is 175 years ago that John Goffe Rand invented and patented the first collapsible tube in the US and thus lay the foundations for the breathtaking success story of this convincing packaging solution. Since then consumers around the world have appreciated the many advantages of this functional, convenient and sustainable packaging which has become an all-time classic.

Reason enough for the European tube manufacturers association (etma) to bring the international tube supply chain together to commemorate this remarkable birthday and market success. Etma will celebrate this 175th anniversary of the flexible tube on the occasion of an international conference entitled "175 Years of Flexible Tubes - And Still Going Strong". The conference will take place in Berlin on 2nd June 2016. It will consist of interesting presentations about worldwide flexible tubes markets as well as other relevant topics for the flexible tube industry and the entire supply chain. In addition, this event will be an excellent networking opportunity for everybody interested in the flexible tube industry.



Drawing from the patent specification, graphically revised Source: Wikipedia

PERSUASIVE OVERALL APPEARANCE

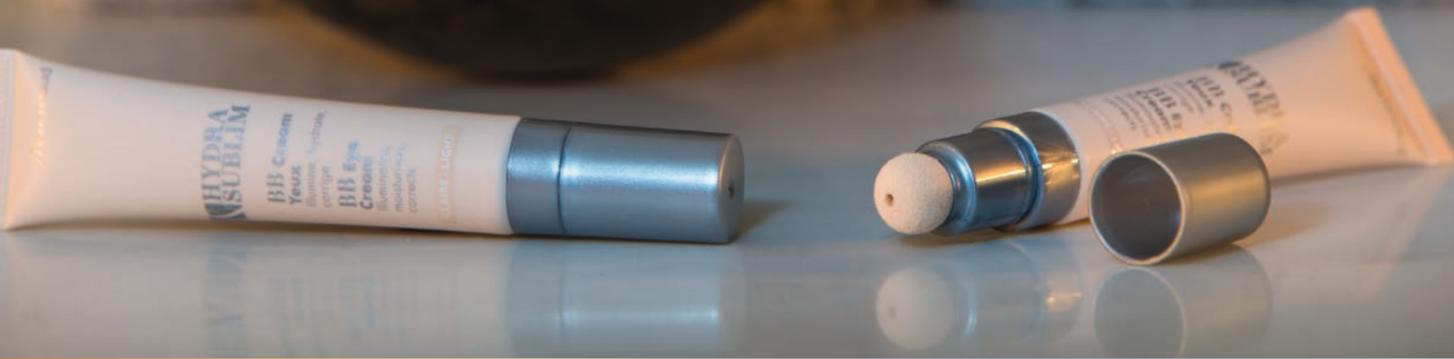
A tube from Tubex for Buly 1803, a Paris-based supplier of perfumes and other luxury articles, was the winner in the Aluminium Tube category. The winning tube for a toothpaste based on mint from Morocco is inspirational with its fascinating representation of a

snake. The extremely realistic reproduction of the reptile is achieved by using 6-colour printing in unbelievable quality. The inscription 'Buly 1803' appears embossed on the shoulder of the tube – excellent optical and haptical product differentiation of the

highest order. The persuasive overall appearance of the winning tube is crowned by a relatively heavy and thus very valuable looking metal closure with a gravure that implies luxury and exclusivity.



HARMONY AND LUXURY



TUBE
OF THE YEAR
2015



There were even two winners in the Plastic Tube category. It was also the application system that convinced the jury with the Marionnaud Hydra & Sublim BB Eye Cream tube produced by Albéa of France. A special sponge pad made from a material that offers a long life and smooth application in equal measure ensures very precise and comfortable handling. At the same time, a special spike in the cap ensures complete air tightness and prevents the contents from escaping inadvertently. The applicator is also a success visually and in interplay with the elegant tube with its silvery screen-printed highlights on a beige-coloured background ensures that the overall appearance exudes harmony and luxury.



Also in the Plastic Tube category, the Caudalie's Spa Object tube produced by French manufacturer CTL Packaging scored with its environmental and sustainability aspects. The production of this tube uses 50 per cent post-consumer recycled (PCR) polyethylene. The manufacturer's expertise in the PCR process and a method of decoration that involves screen printing in three or four colours are crucial for the tube's perfect surface finish with its excellent look and haptics, which embody and convey the 'Spa' theme in an ideal way. For this product, the company has also developed a very special cap in which the inner plastic part is covered on the outside with a special wooden finish. This enables the closure, which is also very attractive and appealing visually, to be opened and closed particularly easily and reliably.

TUBE
OF THE YEAR
2015



SUSTAINABILITY AND PERFECT SURFACE FINISH





The Laminate Tube category was won by a Polyfoil® tube with a so-called 'Twist `n` Use™' applicator that is produced by Hoffmann Neopac of Switzerland for Safersonic. The sterile ultrasound gel was previously supplied in small pouches. This medicinal application involves small needles for anaesthetisation being positioned precisely using ultrasonic technology. Safersonic chose a tube solution that offers the highest possible safety standards because the packaging and the gel both have to be perfectly sterile; a special laminate is used for absolute sterility and good barrier properties, tamper evidence provided by an internal twist-off pin, special canulas for precise and hygienic single-dose application and easy opening thanks to two small wings on the cap.

HIGHEST POSSIBLE SAFETY STANDARDS

TUBE
OF THE YEAR
2015



TUBE
OF THE YEAR
2015

HOLOGRAPHIC EFFECTS CREATE UNIQUE TUBE DESIGNS

CTL Packaging also took the award for prototypes. In this category the French tubemaker impressed the jury with tubes that combine in-mould-labelling production technology with special holographic effects. These effects can be applied in a 360° process, as can the CMYK flexo printing. Additional finishes are possible by combining matt and shiny surfaces. The interplay between these technologies offers designers undreamt-of opportunities and a broad spectrum of fascinating ways to create unusual and unique tube designs.

etma secretary general Gregor Spengler is pleased with the result of the Tube of the Year 2015 competition: "The tubes submitted in general and the winners in particular have proven once again that the opportunities for designing and decorating tubes using innovative technologies are far from exhausted. This year's competition provided impressive evidence once again that the tube offers an alternative form of packaging that is sustainable and eco-friendly. I was particularly pleased, though, that innovative and intelligent tube solutions were able to open up new fields of application; especially where the tube can benefit from its specific beneficial properties, such as safety and hygiene and precise and easy application."



THE TUBE CAPTURES THE SPIRIT OF THE TIMES

If one looks at some of the important changes that have taken place in society in Europe in recent years and in doing so casts a glance in particular at the dramatic changes that have taken place in eating habits and consumer behaviour, the answer is clear: tubes still constitute a versatile form of packaging in many areas of our daily lives. They fulfil the new demands of today's consumer society almost perfectly and in particular offer a whole range of advantages over other packaging solutions. The trends and examples detailed below demonstrate why this is the case.

Senior citizens

Europe's population is ageing. Higher living standards, better medical care and medical advances are leading to a higher life expectancy and a growing number of senior citizens. For this

age group in particular, the tube is not only an important packaging material but also one that is especially well suited to their needs thanks to the range of benefits it offers. Comparatively speaking, the tube is easy to handle for older people: it is easy to open and close. Specially developed closures that are suitable for senior citizens make things even easier and more convenient.

It is natural that the need for medicinal and pharmaceutical products also increases with age. And in this field in particular, the tube is really impressive. Besides being resealable, it offers excellent barrier properties and hygiene standards that can hardly be bettered and which are more important than ever, of course, when it comes to the health sector. For example, even older people can use a tube to apply ointments and creams easily,

in the right quantity and precisely where they are required. Intelligent forms of application offer additional support here and help make handling the tube more reliable and less troublesome in old age.

One-person households

Moreover, the number of one-person households is continually increasing. This means smaller quantities are required for consumption within one's own four walls. The need for smaller portions also brings the tube into play. Regardless of whether it contains cosmetic or care products, the tube's good resealability and barrier properties ensure products last longer in a one-person household. Foodstuffs also stay fresh longer. This coupled with the possibility of extracting the exact quantity required from the tube means the tube also makes a contribution to the Save Food initiative.

Mobile society

Especially younger singles are playing a key role in shaping the trend towards the mobile society. Whether during their leisure time, on holiday or at work, many people are continually on the move. Of course, this is due primarily to today's modern transport infrastructure with its innumerable opportunities for travel or simply for getting quickly and comfortably from A to B. And new mobile media like smartphones and tablets, WLAN and the internet and all the other forms of communication fuel this trend sig-

nificantly. But what role does the tube play in today's 'nomadic' society? Well, if the tube had not been invented almost two centuries ago it would be high time to do so now. Hardly any other form of packaging is as ideally suited for travel and life on the move as the tube. The reasons are numerous: one can cite practically all of the tube's positive properties.

First of all, its light weight has a positive impact. Hand luggage remains easy to manage and rucksacks are easy to carry. Besides saving weight, tube sizes made especially for travel also save valuable space. Tubes are unbreakable and therefore do not harbour any risk of injury due to glass or similar materials. And anyone who has ever suffered from liquids or semi-solid contents escaping from a broken, leaking or damaged bottle, pot or similar container and spreading throughout a bag or case will appreciate forever that the tube is unbreakable. The fact that the tube is easily and reliably resealable is another argument in its favour here. Even though the tube is already easy to handle, there are special closures that enable it to be used with one hand; an additional practical benefit when one is on the move. The range of applications of the tube is universal: cosmetics and care products, products for washing and cleaning, sun creams, a range of first-aid items, remedies for burns or insect bites, or even for a small, cool refreshment now and then. The tube is simply the ideal packaging material for our mobile society.

Consumer protection

In addition, an increase in activities and measures aimed at consumer protection can be observed throughout Europe. The focus is above all on safety aspects. Here, the tube has a clear advantage over other forms of packaging. The tube also scores in this respect because it is unbreakable, as mentioned above. Sophisticated clo-



sure systems allow pharmaceutical or cosmetic products to be applied precisely and in the exact dosage. It is thus more or less impossible to apply them incorrectly or erroneously. The tube's excellent barrier properties and its high hygiene standards protect the product itself superbly so that it has a longer shelf life. All properties that would please those responsible for consumer protection.

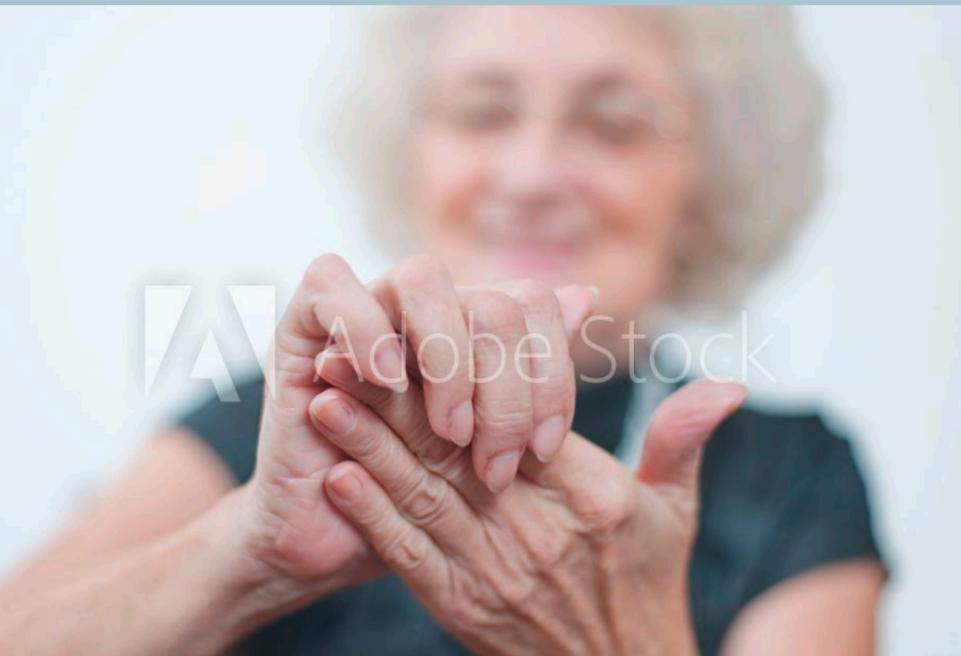
The growing number of counterfeited products are also a problem for consumer protectors, as they are for the manufacturers themselves, especially and increasingly in the case of high-quality cosmetics and care products and expensive pharmaceutical products. Not only do these counterfeited products cause immense damage and high losses in revenue for the manufacturers: worse still are the risks to health and even sometimes the life-threatening consequences for the consumer. Tubes offer a high degree of safety: holograms and similar techniques provide proof of product authenticity; track & trace technologies, such as barcodes, radio-frequency identification (RFID) and e-pedigree, that provide absolute product traceability eliminate additional gaps in security. Today, all of these techniques can be used with tubes without difficulty. In addition, there are special closure solutions for the tube and other features like

protective membranes etc. that offer outstanding tamper-proof seals. The consumer is therefore always on the safe side when it comes to using products out of a tube.

Individualisation

As for consumption, increasing individualisation with regards product selection that extends across various target groups has been taking place of late. It is not only well-known and widely established major brands that are attracting the consumer's attention, but also small niche products in small lot sizes that express an individual's personality: the trend product for a special target group that is artificially kept in short supply in order to demonstrate membership of that group; the highly priced cosmetic or care product in the luxury segment in a limited edition; and the lifestyle product that reflects the attitude to life and the lifestyle of specific and ever smaller groups of the population. Consumption and product preference as a welcome and effective means of emphasising one's own personality.

As a packaging medium, the tube can also meet these enhanced desires and needs with respect to individualisation of consumption today thanks to rapid technical progress. Modern plants can produce small and very small runs at a reasonable cost. Digital printing allows flexible printing of



small lots. It is now even possible to carry out tailor-made, personalised printing, which was previously used especially for promotional purposes. These innovative possibilities are both an opportunity and a challenge for product developers and marketing specialists. Ideas are now called for and phantasy knows almost no bounds.

Exclusivity

This is particularly true when the tube is used as the packaging medium in the luxury segment. It is possible to achieve tube designs today that leave virtually nothing to be desired thanks to the latest methods of printing, innovative colours and materials, and pioneering refining processes as well as innovative closures using application and dispenser systems. Exclusivity across the board, an impression of luxury via look and feel, and a high perceived value with premium appeal. Suitably designed tubes are capable of offering such a perfect appearance today. They arouse emotions, establish brand bonding on the part of the customer and create an effective brand presence at the point of sale.

Online shopping

More and more tubes are now also being ordered via the internet. Business



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conducted online is showing remarkable growth rates throughout Europe. From the point of view of the tube, for example, pharmaceutical products that are often sold via so-called internet pharmacies play an important role here, as do cosmetic and care products of special brands that are otherwise not readily available via the shop round the corner. The tube is the ideal form of packaging for this rapidly growing sales channel particularly where shipping is concerned. Its low weight saves companies transport and delivery costs. In addition it is unbreakable and the risk of possible transport damage is considerably less than it is with other forms of packaging.

Thanks to the tube's outstanding barrier properties, its contents are very well protected against light, air, moisture and contamination, and against heat and cold. The best prerequisites therefore for ensuring the product reaches the consumer intact. For manufacturers this means less complaints and a reduction in the number of items returned, and therefore a lowering of their costs and last but not least there is no loss of image for the company or the brand as a result of complaints. And as there are also black sheep trading online, it is good for the consumer to know that using the tube for packaging always offers a high degree of safety and reliability: protection against counterfeiting via hologram technologies, tamper-proof seals in the form of membranes and closures and various track & trace processes as an additional security benefit.

All of these examples show there is still a long way to go before time runs out for the tube. On the contrary, it is a modern form of packaging for the contemporary society of today and tomorrow. It is flexible, innovative and versatile and has numerous positive attributes. In short, it is simply irreplaceable in many areas, even after 175 years.



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LINCHPIN AND BENCHMARK

The elaborately designed 'Light My Fire' laminate tube with its outstanding appearance makes it the focal point of the 'Balea Luxury' triple pack, an indulgent range of products with the fragrance of peonies and jasmine. German tube maker Linhardt uses in-house developed Multiplex technology together with a Metflex film comprising a high-gloss metallic PET that is full-surface digitally printed and then partially refined and matt lacquered. The result really is worth seeing. The tube is a true eye catcher. Its prominent floral patterns are the defining design elements of the complete set. A decorative box holds the tube, which contains hand cream, and two small bottles with soap and shower gel. The tube is without doubt the highlight and creates real standards with its outstanding design and perfect technical implementation.



orientalisch-fruchtige Duftkomposition mit einer Note aus Pfingstrose & Jasmin

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