

Markets 1st Half 2016: EUROPEAN TUBE INDUSTRY REPORTS SLIGHT GROWTH

Unperturbed by increasing market consolidation, shipments of the European tube industry revealed a positive development in the first half of 2016. Total production of member companies of etma – european tube manufacturers association – totalled almost 5.3 billion tubes and was thus about two per cent above the previous year's figures. Shipments by etma member companies account for some 70 per cent of total European tube production. This means tube production outpaced growth in GNP and industrial production in Europe, both of which were at roughly 1.5 per cent.

The most important market remains the cosmetics sector with a share of about 45 per cent. Pharmaceutical products and dental care follow at a distance with just over 20 per cent each. The food sector remains just under ten per cent and the remaining five per cent is used in industrial applications or the household sector.

Tube of the Year 2016: THE WINNERS IN THE TUBE'S ANNIVERSARY YEAR

The gala dinner at the end of the World Tube Congress 2016 organised by etma (the European tube manufacturers association) to mark the 175th anniversary of the tube's invention provided a glittering setting for the presentation of this year's winners of the Tube of the Year competition. Some 150 participants and guests from the whole process chain of tube production had gathered in Berlin. "A fitting occasion for the jury, which comprised experienced representatives from our member companies augmented by editors from two well-known trade journals, to get together," said etma Secretary General Gregor Spengler, who was extraordinarily pleased with the surroundings and the jury's choices.

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**TUBE
OF THE YEAR
2016**



WORLD TUBE CONGRESS

175 YEARS OF FLEXIBLE TUBES

Berlin 2nd June 2016

European tube
manufacturers association

etma

EVEN AFTER 175 YEARS THE TUBE IS A PACKAGING SOLUTION WITH A FUTURE

At the invitation of the European Tube Manufacturers Association, etma, the global tube industry met in Berlin on 2 June 2016 to mark the 175th anniversary of the discovery of the tube by the American John Goffe Rand. As etma's secretary general, Gregor Spengler, emphasised in his welcoming address to the 130 participants, there were not only representatives from almost all important tube manufacturers at the World Tube Congress but also global specialists and companies from the whole tube supply

Takaaki Takeuchi,
Managing Director Alucon, Thailand

„Networking at its best: That was one of the main assets of the World Tube Congress where the entire flexible tubes value chain came together to celebrate the 175th anniversary of the flexible tube.“

Gabriel D. Sdoia
Operational Director and Member of the Board
Bispharma Packaging, Brazil

“The World Tube Congress was an outstanding international networking event, and the ceremony of etma's Tube of the Year 2016 Award showed how the flexible tube industry can present innovative ideas and breathtaking presentations to the market.”

chain. To continue the success story of the tube as a packaging solution during the last 175 years one has to think outside the box and take a global and comprehensive view of the challenges and future opportunities for the tube as a packaging material. The congress offered an outstanding opportunity for this approach in the form of a series of excellent papers and presentations, with lively discussions that went into further detail.

Betty Jean Pilon
President Montebello Packaging, Canada

“The conference program of the World Tube Congress provided a comprehensive overview about the current situation and the main challenges of the flexible tubes markets worldwide and about other megatrends which are relevant for the packaging industry as a whole.”

etma's World Tube Congress in Berlin points the way:

Dr Monika Kopra-Schäfer, Ex-President of etma, Michael Hoard, President of the US Tube Council and Ashok Goel, Managing Director of Essel Propack, were concordantly optimistic about the future outlook for the tube in the most important markets, Europe, North America and Asia, even though diminishing growth in the global economy could make the situation somewhat more difficult. Moreover, the tube industry will have to cope with substantial challenges

Ashok Goel,
Vice-Chairman and Managing Director
Essel Propack, India

„It was an excellent idea of etma to organize the first World Tube Congress on the occasion of the 175th jubilee of the flexible tube and to convoke the entire flexible tube supply chain in order to discuss the industry's opportunities and challenges.“

due to the increasing complexity of international markets, with ever-smaller batch sizes and continually growing demands with respect to decoration, more stringent regulatory requirements for food, pharmaceutical and cosmetic products coupled with growing expectations with regards the sustainability of packaging. The same applies to the requirements that arise as a result of megatrends, such as an ageing society, changed shopping behaviour, increasingly more mobile consumers (keyword: internet shopping) and 'big data' (packaging as a communications tool).

Daniel Stricker of KI Group presented the current situation in the raw materials market for plastics in his consideration of the global development of prices and capacities for those materials relevant to the tube industry.

Francois Luscan,
President and CEO Albéa-Group, France

“The World Tube Congress was an excellent opportunity to meet leading flexible tube producers and suppliers from all over the world and to share views on the short- and mid-term evolution of the industry.”

Philippe Blank of Henkel shed light on the key requirements for packaging from the point of view of a brand owner operating successfully worldwide, Mathias Ponzelar (IWK) pointed out the opportunities that Supply Chain 4.0 offers the tube from the point of view of a leading manufacturer of tube filling machines and Marco Atzberger of EHI Retail Institute cast a fascinating glance into the future of the retail market with its new shopping world and its influence on the packaging sector.





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etma Secretary General Gregor Spengler was happy about the high degree of commitment of the companies participating in the competition in the tube's anniversary year, which was reflected in the large number of entries submitted. "The anniversary certainly helped and has kindled ambition. What is more important, though, is the renewed demonstration of the enormous innovative capability and creativity with which our members manage time and again to design the tube as a modern and contemporary form of packaging. Even after 175 years, the tube is simply indispensable in the world of packaging as an all-time classic packaging solution."

Splendid surroundings for the award ceremony during the etma Gala Dinner in Berlin's Humboldt Carré. Winning tubes were perfectly put in the limelight.



Accumulated expertise in the Jury: Representatives of etma member companies in cooperation with renowned journalists of leading European packaging and cosmetics magazines.



UNIQUE. CUSTOMIZED. SERIALLY NUMBERED.

The winner in the Aluminium Tube category was 'The Jam Tube' from Italian manufacturer La Metallurgica. It contains different marmalades and jams of absolute top quality and in unusual flavours. It is ideally suited for on the go, when travelling or at home, of course. A simple, classic aluminium tube but the prize winner still managed to provide a number of ground-breaking benefits using revolutionary DigIT technology. Photorealistic printing produces lifelike images and at the same time very small production runs also allow very special flavours to be produced precisely in the quantity that is demanded or required. The DigIT system enables customer requirements to be satisfied individually. Each tube is thus a unique product that is documented each time by the respective serial number.



TUBE OF THE YEAR 2016



FEEL AND SMELL THE WOOD!

The 'Überwood Tube' developed and produced by TU-Plast of Hungary won the Plastic Tube category. This novel concept takes account of the growing demand for organic and natural products and packaging. The polyethylene tube contains more than 25 per cent real wood-based material. And these natural constituents are not only visible in the surface structure of the tube material: the Polywood tube offers a unique tactile experience, one can virtually feel the wood and one can even smell it. The body and head of the tube can be printed in every possible colour. The special structure of the Polywood tube means that hot foil stamping, screen printing and overprint varnishes do not develop their full impact. The manufacturer therefore recommends offset printing for decoration. Not only does this produce great results but it also brings the tube's authentically natural surface particularly to the fore.



TUBE
OF THE YEAR
2016



COMPLETE
FORMULA
PROTECTION
AND ZERO
CHEMICAL
MIGRATION



The winner among the laminate tubes was a joint development from L'Oréal Paris and French tubemaker Albéa. The aluminium barrier laminate (ABL) tube for the hair dye product Casting Crème Gloss is a real revolution for the tube market. It not only has an excellent aluminium barrier in the sleeve but in the tube shoulder as well thanks to a membrane that covers the whole shoulder.

This means there is complete protection of the contents and no chemical migration before opening the tube for the first time. In addition, the special web stock prevents air suck back during use. An optimised welding technique used for the side seam and shoulder improves the tube's efficiency and cost economy. In general, convenience and consumer benefits are a top priority. The tube material is pleasant to the touch and when it comes to visual appearance flexo printing with its superb capabilities offers innumerable options for design and decoration.

TUBE
OF THE YEAR
2016



INGENIOUSLY
SIMPLE
AND
SIMPLY
INGENIOUS

Two first prizes were awarded in the Prototypes category. One of the winning tubes is produced by Hoffmann Neopac AG of Switzerland. The tube impressed the jury with its innovative dispensing system, which is protected by the 'Spin'n' dose' trade mark. It solves the problem of dispensing viscous medicinal products perfectly. The dispenser wheel supplies 0.5 mg or 1 mg doses, even without a pump. The principle and handling are as ingenious as they are simple: applying pressure to the tube produces the initial filling, with the inner chamber of the system becoming filled with product and the coloured ball being forced upwards. One then turns the wheel through 180 degrees. When one presses the tube once more, the product begins to flow, the ball moves to the top and cuts off any further flow. The exact quantity is thus dispensed. For every subsequent application, one only has to turn the wheel and press on the tube. After application of each measured portion the dispenser chamber fills up again automatically with exactly the same portion.



TUBE
OF THE YEAR
2016



UNIQUE
INDIVIDUALITY
FOR
UNPARALLELED
OPPORTUNITIES



The other winning tube in the Prototypes category also came up with a compelling concept. With its 'Be Unique' plastic tube, French tube-maker CTL Tuboplast presented a pioneering combination of its patented in-mould label (IML) technology and its ESTube with a new digital

offset printing technology: Use of the so-called mosaic effect enables individual, specific print elements to be applied to each tube, each tube to be individually numbered for limited product editions and a QR code to be used for each individual tube for perfect communication. This results in

almost unlimited opportunities for decorating the plastic tubes: 360-degree hot or cold foil embossing from the shoulder to the welding area at the end of the tube, direct colour or heptachrome printing, and an optional combined matt or gloss finish.

TUBE
OF THE YEAR
2016



European consumers' opinions about packaging

STUDY REVEALS DISTINCT DIFFERENCES BETWEEN CULTURES, COUNTRIES AND GENERATIONS.



European consumers' expectations with regards different forms of packaging, the demands they make on them, and the functions and tasks they expect packaging to fulfil are assessed and perceived quite differently throughout Europe. Consumers' strongly diverging opinions depend primarily on their nationality and their cultural habits as well as very markedly on their age.

That is the result of a study that the French market research company L'ObSoCo was commissioned to undertake by the Paris All4Pack trade fair. Consumers from different age groups in Germany, France, Spain and Italy were interviewed. Both functional and emotional aspects were investigated: the role of packaging in online shopping, developments in connected and smart packaging, the role and importance of the information on packaging, interest in limited editions and customised packaging, and of course the question regarding the packaging properties that are most important for the consumer.

Consumers in Europe are in agreement on one question: the most important criterion in all countries surveyed is the reliability of the packaging as this guarantees product protection. This was the reply given by 35% of those questioned. It was followed in second place by packaging's communicative function with information about the product or the contents (26%); next in the list is packaging as an object to buy the right quantity (16%). As added value, the

consumers expect best possible functional handling and optimal consumer friendliness in use (12%).

Although the different nationalities were very much in agreement on these questions, considerable and surprising differences from country to country are revealed when it comes to special aspects. For example, French consumers are particularly sceptical towards innovative packaging options and new designs and are also less open-minded where emotional impact in the message of the packaging is concerned. On a scale from 1 to 10, the French only gave these features a score of 3.8 and were thus well below the European average of 4.8 points and miles away from the highest score of 6.4 points, which was recorded in Spain.

Besides the Italians, Spanish consumers are more likely to enthuse about limited editions and customised packaging. They are far more open-minded with respect to all new packaging ideas than the rest of Europe. Italians and Spaniards appear to be the most sensitive to 'aspirational' packaging that is innovatively pleasing to the eye and 'fun'.

Environmental awareness is more important for German consumers than the other Europeans. Lightweight



packaging is preferred, especially where shipping of online shopping is concerned. This was the opinion of 33% of the Germans questioned. In addition to being lightweight,

packaging should also be eco-friendly and recyclable (29%). According to the study, German consumers are far more open-minded than their European neighbours when it comes to environmental aspects of packaging.

However, it is not only nationality and resultant cultural patterns that decisively influence attitudes towards packaging. As the French researchers discovered, the age of the people interviewed also plays a major role. As expected, the greatest proponents of so-called connected packaging were to be found in the 18-24 age group. An impressive 71% of this group thinks that connected packaging constitutes a 'genuine advance' both for health and product safety.

With regards e-commerce and online shopping, 36% of these young consumers prefer lighter packaging so that a smaller weight has to be transported and the environmental impact is lowered, shipping charges are minimised and the amount of packaging waste is reduced.

By contrast, for older consumers it is the stability and reliability of the packaging that is to the fore when shopping online. For 37% of those questioned between 55 and 70 years of age, product protection is the most important argument where preference for a specific pack is concerned. Nevertheless, older consumers also have their sights firmly set on environmental aspects. After all, when purchasing products on the internet 37% of them prefer packaging that can either be reused or is at least easy to recycle.

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IMPRINT

Publisher

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