

SUSTAINABLE AND A LOT MORE. **MAKING A CASE FOR THE TUBE**

Nowadays, discussions and proposed solutions relating to packaging often end up dealing with topics such as the environment, recycling and sustainability. The actual core function of packaging, namely the protection of the product, and other important aspects, such as ease of use, information about the product, brand and use, are increasingly taking a backseat.

A more wide-ranging report on the tube's overall performance can be found on page 14.

60 YEARS OF ETMA

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EUROPEAN TUBE PRODUCTION: **ETMA MEMBER COMPANIES MAINTAIN STEADY COURSE**

Production by all European tube manufacturers totalled a remarkable 15.5 billion tubes in 2018. The member companies of the European tube manufacturers association, etma, contributed the lion's share of this figure: 10.9 billion tubes and thus around 70 per cent of the total. When adjusted for the tubes produced by its new members, the etma figure corresponds to growth of 1.4 per cent compared with the previous year.

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etma president Oliver Höll's assessment of the figures is equally positive: "We're satisfied with the market situation in 2018. Production capacities were well utilised. We expect demand for tubes to remain stable in 2019, too, because our most important markets, namely cosmetics, pharmaceuticals, toothpaste and food, are proving to be very robust. However, we're somewhat concerned about the considerable increase in costs for energy, transport, coatings and printing inks. Nevertheless, all in all I'm confident about the future market developments for our industry and our member companies' prospects."

Of the 15.5 billion tubes supplied by European manufacturers to the various packaging markets in 2018, 38 per cent were made of laminate. Aluminium tubes rank just behind with a share of 35 per cent and the remaining 27 per cent are made of plastic.

The broadly diversified cosmetics sector remains by far the largest market for tubes in Europe, with a 47 per cent share of annual production. It is followed by the markets for toothpaste and pharmaceutical products, which each account for around 20 per cent. The food sector, with about 8 per cent, and household

goods, with about 5 per cent, are also important end-use markets.

According to etma secretary general Gregor Spengler, the figures demonstrate the tremendous versatility of tubes and their potential for almost universal use: "Tubes are characterised by maximum functionality and consumer friendliness. With their three material variants, namely aluminium, laminate and plastic, they facilitate the use of customised and resource-efficient packaging solutions for a wide variety of applications. Therefore, our industry can look to the future with optimism."

The etma World Tube Congress, which takes place in Hamburg on 23 May 2019, will provide a good opportunity to look ahead and bring together the entire supply chain for the tube as a packaging material. Besides discussing current market developments and the latest packaging trends, there will also be discussion of trends in consumer behaviour throughout Europe, innovative optimisations in the supply chain and the current megatrends sustainability and digital transformation. Embedding these trends in corporate policy is the prerequisite for positioning the tube as a pioneering and modern packaging for the world of tomorrow.



The aluminium tubes for LK OPC hair colour cream from Italy's Lisap Milano impress at first sight. The graphically accentuated appearance of the aluminium coupled with the elegant gradation of the grey tones and the reserved puristic artwork exude an aura of perceived value and premium

INNOVATIVE CAP DESIGN: UNIQUE AND FASCINATING

appeal. However, the highlight of the tubes, which are produced by global manufacturer Alltub, are their fantastic closures. The so-called Fancy Caps were originally developed by Alltub Italia to offer unique and special solutions in the market for aluminium tubes with cap customisation. The caps are printed and customised using hot stamping. The sides of the closure and its top can both be printed in an unlimited range of print designs and colours. Lisap Milano is now the first supplier to market tubes with these closures. The all-round logo on the side of the cap and the holographic effect on the top make the tube even more fascinating and unique.





A SHINY DESIGN
HIGHLIGHT

ESTEL Curex Sun Flower is a hair care product that protects the hair against UV light when exposed to strong sunlight. It is marketed by the Russian company ESTEL Professional and the plastic tubes are produced by the Lean Group from Belarus. The tube is a real eye-catcher and sends an unmistakable signal to consumers at the point of sale or in online shops. First there is a graphically interesting colour transition from a spectacular dominant orange to a lighter orange. It changes yet again with the cap in the intense orange colour. The real highlight of the tube, though, are the logos. Lean Group is now using new technology to present a combination of an optical eye-catcher due to high-gloss foil and a surprisingly tactile effect based on the relief shape on the tube. The process uses silk screen technology to create the image, which is then cured with the help of UV lamps. Finally, the surface of the image is subjected to silk foil hot sealing. The result is a sensational brand presentation that stays in the consumer's memory



The 100 ml Sound of Donna tube for body lotion from Trussardi was produced by the Italian company Global Tube from extruded monolayer PE. The oriented flip-top-cap has a sleeve that offers the consumer added security and a tamper-proof seal. The colour of the tube and cap are matched precisely; the logo and lettering are in shiny silver thanks to the perfect silk screen and hot foil printing. The elegant premium appeal of the tube is further enhanced by a double varnish. The use of two types of lacquer, opaque and glossy, creates the impression of a wave moving gently on the front of the tube, which emulates the sinuous silhouette of a feminine figure. In combination with the well-known Trussardi logo, this unique and fascinating tube design reflects the global lifestyle brand's claim to premium status.

LIFESTYLE
AND PREMIUM
APPEAL





ELEGANCE ALL THE WAY

Spanish tube manufacturer Petroplast has developed a three-tube series for the Atashi Cellular Cosmetics product line from its Madrid-based client Laboratorios PHERGAL. The client's expectations with regards luxury packaging for a complete range of high-quality cosmetic products were met perfectly. This was achieved by using enhanced pearl-

effect colours for both the tubes and the caps, in each case by developing specific masterbatches. Printing involved combining complex techniques, including two-colour silkscreen and offset printing. The result is really impressive. The tube series comes in a finely tuned colour concept, and the sparing use of graphic elements and the discreet artwork create a puristic and extremely valuable look. The especially long tubes with their slim lines add an elegant touch to the appearance of the range.



With its pioneering DiGIT technology for digitally printed aluminium tubes, Italian tube manufacturer La Metallurgica is opening up a new dimension in communication between brand owners and consumers. This is made possible by a watermark that is invisible to the naked eye and can be integrated perfectly into a printed image on the tube without disturbing the user's perception of the tube. If the tube is then scanned with a smartphone or tablet using the corresponding app, the user can access a wide range of different communication contents and forms via the Internet: brand promotion, product information, instructions for use, anti-counterfeiting, track and trace information, right through to conducting direct contact with consumers. The imagination of a company's marketing and communication experts is then virtually unlimited. The well-known Italian brand Itely is now using this new communication tool for its blonde toner tube.



NEW OPPORTUNITIES FOR COMMUNICATION



60 YEARS OF ETMA

PROMOTING THE SUCCESS STORY
OF THE FLEXIBLE TUBE

The European tube manufacturers association (etma), which is a working group of the German Aluminium Association (GDA) today, was founded in Paris on 25th April 1959; about 118 years after the painter and inventor John Rand patented the first collapsible tube and seven years after the European Coal and Steel Community (ECSC) came into being which ultimately led to the European Union (EU).

Etma's original nucleus in 1959 was the cooperation of the Collapsible Tube Manufacturers Association and the German Fachverband Tuben, Dosen und Fließpressteile (Division of Tubes, Cans and Impact Extruded Parts) which consisted of fourteen UK and German tube producers. The first President of the organization was Mr. J.W.G. Collins of the company John Dale Ltd. Some of the founding members (Karl Höll, Tubex and Linhardt) are still part of etma today.

The German/UK cooperation was quickly expanded to other European countries. Thus, in 1960 the European Tube Association (ETA) was created which additionally comprised tube producers from Austria, France, Italy, Netherlands, Sweden, Switzerland and Spain. During the 1960s further tube producers from Belgium, Finland, Norway and Portugal joined the association. Later also Greece became part of the organisation.

The enlargement of the ETA to Eastern Europe began in 2001 well ahead of the Eastern enlargement of the EU which started in 2004, and this expansion has not stopped since then. Now etma comprises also members from Belarus, Bulgaria, Czech Republic, Hungary, Poland, Russia, Slovenia, Slovakia and Turkey and is a shining example of pan-European industrial cooperation.

As of 1st January 2003 the association was renamed into European tube manufacturers association (etma). Today, etma represents the interests of 44 members from 18 European countries.

Up to 1984 etma's statistics were pure metal tubes statistics. In 1985 also laminate tubes deliveries were recorded. Finally, in 1995 plastic tubes statistics were established, too. Consequently, volumes reported by etma members grew from 2 billion tubes in 1960 to over 3.5 billion pieces in 1985 and 6 billion units in 1995. In 2018 volumes reached a record level of 11

billion tubes which means that etma members account for about two-thirds of total European flexible tube production.

Together with an increasing number of members also the organisation's main activities and services expanded which lay the foundation for an efficient industry promotion and sound decision-making of etma members.

etma's main tasks comprise the representation of the European tube industry to third parties and the supply of statistics and general packaging market information for its members. In addition, etma is monitoring the European packaging, food contact, cosmetics and environmental legislation to keep its members abreast of latest regulatory developments. Especially the ambitious recycling requirements which were stipulated in the EU packaging legislation in 2018 will be one of the major challenges for the European packaging industry in the coming years. Moreover, etma has

developed many European flexible tube standards which are the industry's qualitative benchmark worldwide. Finally, etma is promoting the tube as packaging of choice through the publication of the Tubes & Trends magazine and the annual "Tube of the Year" contest which time and again reflects the innovative drive of the European flexible tubes industry and which is broadly echoed in European packaging media.

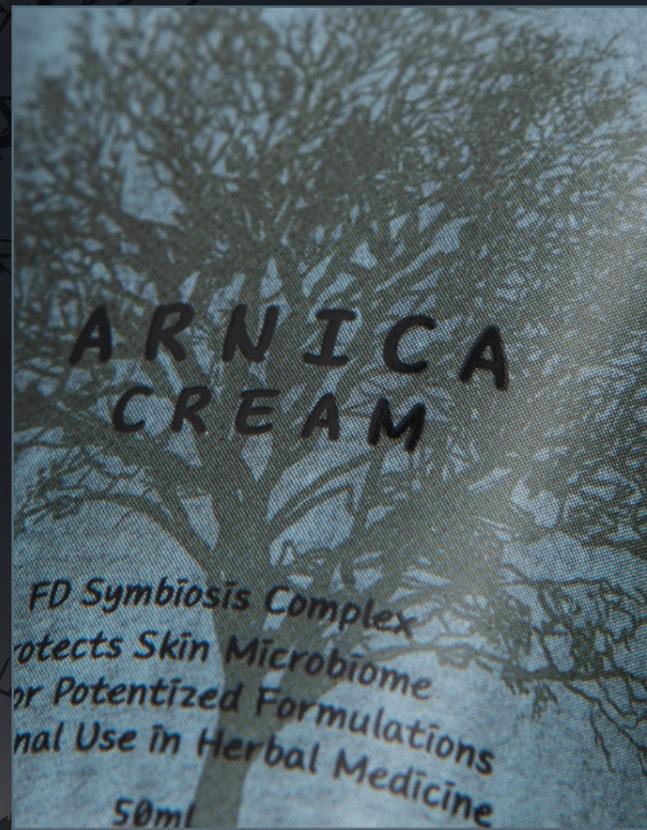
In order to bring the entire flexible tubes supply chain together, etma organizes the "World Tube Congress" every three years which has become the top event for the flexible tubes industry worldwide.

Etma's ambition is to continuously expand membership in Europe, to further improve the service for its members and to promote the cooperation of the global flexible tubes value chain to the benefit of this unique packaging solution which has written an unparalleled success story over the last 178 years.



Frezyderm has expanded its personal care portfolio with its Holistic range, the tubes for which are produced by Greek manufacturer ARGO. The tubes are printed in a single pass using a combination of printing techniques: CMYK by flexography and spot colours by silk screen. The black monolayer tubes still catch the eye despite the reserved and almost puristic design. They impress with a differentiated colour scheme in natural tones that highlights the different therapeutic benefits and applications of the individual products. In addition, the matt finish gives the tube a paper-like feel, which creates added attention at the point of sale and emphasises the product's appeal even further. In contrast, the logo and the names of the products are highlighted with spot gloss varnish. All in all, an extremely harmonious design that conveys product promise convincingly.

PRODUCT AND DESIGN IN HARMONY



Italian tube manufacturer Tubopress is causing a sensation with its 400 ml plastic tube for Jaguar Fragrances shower gel from Zurich-based Laliq Group. The extraordinarily large volume of the tube provides maximum brand visibility and perceived product value coupled with convenience that the consumer appreciates. Both brand and product are aimed at the prestige market for men's fragrances and personal care products. The tubes could hardly present themselves in a more coherent and target-group oriented way. The two tubes are designed in different colours and surface appearances and carry the dynamic and prestigious legendary Jaguar logo: the colour in the mass is the characteristic matt green traditionally used by British sport cars or an elegant gloss black. The flip top caps come in the same colour as the tube. The tube decoration is 360° hot foil printing using a classic gloss silver colour, while the flip caps have a hot foil ring. The sleeve of the flip top cap is the tamper-proof seal and adds value to this truly premium product.

PURE DYNAMICS, POWER AND PRESTIGE



SUSTAINABILITY AND DESIGN IN THEIR PUREST FORM

PUR HAIR, the German specialist supplier of hair care and colour products only uses natural and certified ingredients; it does not use sulphates or parabens and its products are completely vegan. As a consequence, the company's products and philosophy also include environmentally friendly packaging. The Italian producer Scandolara manufactures the tubes for PUR HAIR's organic moisture treatment. The packaging is based on PURE Green from Braskem PE, which is polyethylene made from sugar cane. PURE Green helps reduce CO2 emissions and the carbon footprint. Regarding stability, decoration and weldability, the tube material has the same properties as conventional PE. This ensures perfect handling and does not cause any extra investments in time or resources. The same result can be achieved with the PP used for the tube closures, thus creating a completely green packaging. The tube design is coherent to PUR HAIR's concept of sustainability: two-colour screen printing creates a clear, pure and puristic look that perfectly conveys product promise and brand essence.



The aluminium tubes for Love Beauty and Planet oral care were produced by Spanish manufacturer Witte y Solà. The Love Beauty and Planet brand is based on the use of premium natural fragrances and highly efficient natural formulae. It aims to make women look good and feel good, and at the same time make the planet a little more beautiful and better. The company is committed to a holistic approach that focuses on a product's entire life cycle, sustainably sourced ingredients and completely recyclable packaging. The brand's philosophy is also reflected consistently in the conscious decision to use aluminium tubes: the

company says aluminium is fully recyclable and its use would help reduce the amount of waste going to landfills. Moreover, using aluminium tubes in oral care means reviving a historical packaging material. It has a premium look and feel and adds nostalgia to the toothpaste. The design of the tube implements this idea perfectly. And thanks to its flexible properties, the contents can be squeezed out of the tube completely, thereby contributing to less product waste.

ALUMINIUM AS A PHILOSOPHY



THE TUBE AS PACKAGING: A MULTITUDE OF BENEFITS. MUCH MORE THAN JUST SUSTAINABLE!

When consumers talk about packaging today, it is mostly about waste and environmental pollution, about more sustainability or about recycling rates. These are without doubt important issues and given the increasing impact on our environment it is necessary to address them. Unfortunately, though, there are other important aspects of packaging that fall by the wayside. Packaging's original function, namely to protect the product, is playing an ever-smaller role in discussions, which are often emotionally charged. Other aspects of packaging, such as providing the simplest and most consumer-friendly use possible, or the numerous and important ways in which it can provide information about a brand or product and its contents, use and applications, are increasingly taking a backseat.

Packaging only accounts for around 1.5 to 2 per cent of the average European consumer's CO₂ footprint. At the same time, there is hardly any acknowledgement in the public debate of packaging's influence on resource and climate protection. After all, packaging helps protect the resources tied up in the packaged product. Without efficient packaging, even more food would spoil. Product damage during transport and storage destroys more resources than are used in the most expensive packaging. This is also true, of course, for the tube as a packaging material. But how does the tube perform when examined in detail?

First of all, thanks to its properties the tube is extremely versatile and has proven to be a real all-rounder. It is ideally suited for almost all semi-solid and pasty products in the cosmetics sector, for dental care, in the pharmaceutical or medical sectors, for foodstuffs, for household and industrial products, and for countless other special applications. Overall it offers a range of benefits compared with alternative forms of packaging: excellent barrier properties, excellent hygiene standards, convenience and ease of handling, unbreakable and lightweight. Furthermore, it offers a range of consumer-friendly features, such as tamper-evident protection and a host of state-of-the-art communications features. It is not least the sum of these benefits that gives the tube its edge and, on closer inspection, makes a significant contribution to sustainable and resource-conserving consumption.

This conservation begins with the tube's outstanding barrier properties mentioned above. The tube is impermeable to light and air, water and moisture, and resistant to germs, bacteria and most other harmful substances. The fact that the tube is also unbreakable and corrosion-resistant means it protects its contents perfectly. At the same time, these properties also prevent sensitive and volatile constituents escaping from the contents. The product thus keeps its consistency, taste, efficacy and quality. Not only during use, but also during transport, warehousing

and storage. And it does so over a long period of time. In concrete terms, this means that from the point of view of sustainability the contents and products do not spoil so quickly, they keep longer, and they do not have to be replaced, and thus produced again, as often as would otherwise be the case. The bottom line is that fewer raw materials and constituents are used and there are energy savings in production and transport.

The tube offers similarly convincing arguments when it comes to hygiene. It meets the highest possible hygiene standards, especially in the medical and pharmaceutical sectors, but also when used for sensitive cosmetic products and, of course, foodstuffs. Thanks to its unique concept, the tube is clearly superior here to most other forms of packaging: when the tube is opened and the product is pressed out, harmful substances, germs or bacteria cannot enter the tube or the product during use. The contents of the tube do not become contaminated. A further benefit is the tube's easy and problem-free resealability. Products are still safe to use even over a longer period. Sensitive and delicate contents, such as medical ointments or high-quality cosmetic creams, have the desired effect for a long time. Ultimately, the tube's exceptional standard of hygiene leads to more economical use of the ingredients, especially in the medical sector and for high-priced cosmetic products.

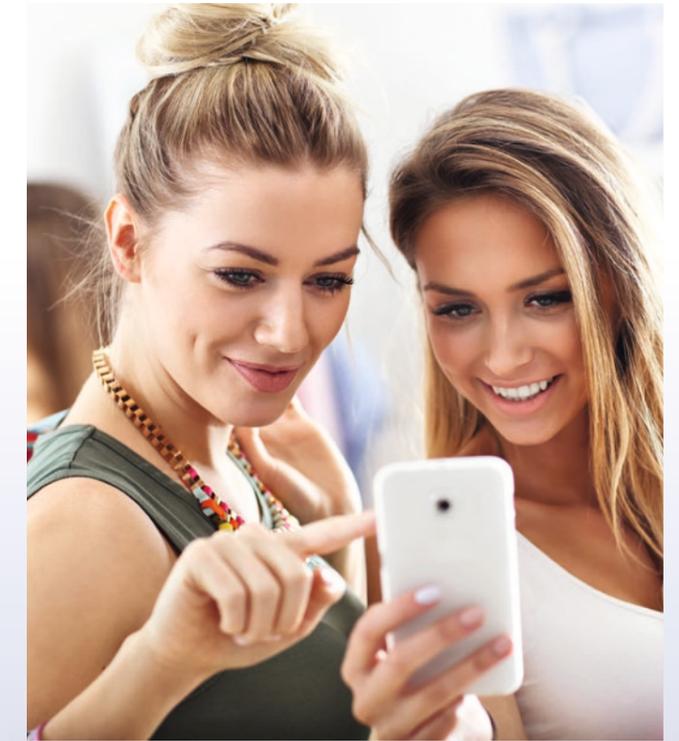
The tube is extremely user-friendly and, compared to some other forms of packaging, is easy and simple to handle. Not only do intelligent closure systems and dispenser solutions facilitate easy opening and closing, they also ensure correct and economical portioning of the contents. In medical applications, for example, ointments can be applied precisely without the preparation coming into contact with contaminated or infected parts of the body. To the greatest possible extent, faulty applications, which could lead to considerable consequential costs, can be ruled out. There is now an optimum closure for almost every conceivable product and every application: practi-

cal one-hand closures, senior-friendly solutions and caps with child protection, to name just the most common ones. Tamper-proof seals offer the consumer a high degree of safety and security. In addition, there are modern measures to prevent product counterfeiting. They also ensure the safety of each individual consumer, but at the same time they also prevent considerable economic damage for brand owners and entire sectors.

Another advantage of the tube is its low weight. The tube takes up very little space, is robust and unbreakable. It is thus ideal for use on the move and for our mobile society. Above all, however, it is light and easy and safe to transport. This saves suppliers and retailers considerable costs, and there is a noticeable reduction in the impact on the environment. This is a further plus point for the tube when it comes to sustainability and is becoming increasingly relevant given the rapidly growing volume of online and mail order business.

With all its positive properties as a packaging material, the tube is thus fully in keeping with today's trend and is proving to be modern and contemporary: it is an ideal form of packaging for senior citizens in an ageing society and is ideally suited for the increasing number of single households and for life in an increasingly mobile society. Thanks to state-of-the-art technologies, the countless communications features that the tube can offer today provide an added boost to the tube's future as 'connected packaging' and provide additional stimuli and an innovative appearance.

Of course, European tube manufacturers are also developing innovations to improve sustainability and environmental protection directly: environmentally compatible production processes, efficient use of resources, responsible material reduction, the use of recyclable or renewable materials and the use of post-consumer recycled material where this makes sense.



Combining eco-friendly and sustainable tube production with an attractive design no longer means having to combine incompatible opposites. Spanish manufacturer CTL Packaging has demonstrated this impressively with its Biorene tube for white hair. The tube is made completely from mono-material: body, head and cap are all made from PP, so it can be completely recycled. Digital offset printing reduces the use of tools and pollutants, and cuts manufacturing losses. In addition, the tube uses a 360° metallisation process from the skirt to the crimp area that increases its shelf appeal. Its attractive appearance is enhanced by a high-definition photo that catches the consumer's eye at the point of sale.



SUSTAINABLE PRODUCTION AND ATTRACTIVE DESIGN GOING HAND IN HAND



At this year's Packaging of Perfume Cosmetics and Design trade fair in Paris, Swiss tube manufacturer Neopac received an award for the sustainable concept of its tube for the Bamse brand. Trimb Healthcare of Sweden is the brand owner. The Bamse brand offers a range of skin care products, which are specially developed for children and have ingredients that are particularly gentle to sensitive skin. The company has consciously chosen an environmentally friendly tube to communicate its message via packaging that is apt for its range of natural products, which are Ecocert certified. The PICEA tube used consists mainly of wood waste from spruce trees combined with a plastic matrix of sugar-based raw materials developed specially for Neopac. This means that more than 95 per cent of the tube is made from renewable materials. The tube is easy to print without varnish, has comparable barrier properties to tubes made of PE or LDPE and is, of course, recyclable.

AWARD FOR SUSTAINABLE TUBE CONCEPT





Together with its customer HWM Hanseatische Wurstmanufaktur für Heimtiere, Austrian manufacturer Pirlo has developed an aluminium-free laminate tube with a particularly soft feel. The tube is made of polypropylene from top to bottom. Besides the resource-saving use of raw materials, complete material recycling is now possible. And the tube also impresses when it comes to convenience: it is extremely good where complete emptying of the valuable contents is concerned and there are no sharp breaks or colour breaks. The quick-release fastener means only one small turn is needed for opening and reclosing. The tube also feels good: foil lamination creates a pleasant soft-touch surface. At the same time, the fastener provides perfect protection for the tube's contents as well as for the tube's photorealistic image, which is produced by high-resolution flexo printing.

PERFECT PROTECTION OF CONTENTS AND THE ENVIRONMENT



INNOVATIVE CLOSURE SYSTEM

The aluminium tubes for Mills Original Kaviar and Ekte Majones from Norway are manufactured by Austrian tube producer Tubex Wolfsberg. With its conspicuous and catchy colour scheme the tube catches the eye at once, thereby attracting attention at the point of sale. The aluminium tube itself has a classic look but it is the closure that is the unique innovation here. The joint closure system was developed to allow the contents to be portioned either as a thin strip of mayonnaise or a thicker one. If the consumer unscrews the outer cap, the inner and outer caps are both removed. The piercer on the outer cap can then be used to perforate the tube's membrane in the usual way. When the

tube is then squeezed, the strip of mayonnaise produced is of the usual thickness. However, if the consumer screws the outer cap back onto the tube and then pulls on it, the inner cap stays on the tube. The opening is then smaller and therefore creates a narrower and thinner strip. A real benefit for the consumer, who will remember this, thereby strengthening both the product and the brand.



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