

Abstract GVM Multi-Client Report

The Packaging Market for Paper Composites in Germany



Trends and Potentials until 2016
Industries, Market Participants,
Strategic Options

Mainz, March 2013

sciendea+

gvm Gesellschaft für
Verpackungsmarktforschung

The Report - Brief Description

The demand for innovative paper composites is increasing - more than just a simple fashion trend

Supply bottlenecks and decreasing margins force packaging manufacturers to creative solutions. In order to reduce the dependence on scarce crude oil, paper packaging is increasingly replacing plastic packaging. Furthermore, as a renewable resource, paper has a positive “Eco Image“ with both trade and consumers. Last but not least, paper entails a resource saving potential of 70% - a trend reversal seems to be in sight.

Objective and Methodology of the Report

GVM, in cooperation with the consultancy sciendea+, examines the packaging market for paper composites in Germany. Used for the assessment are both the findings of GVM's research of the packaging market - continuously expanded for decades - and a current survey of decision makers and consultants from all sectors concerned. The study offers a well-founded outline of present as well as of future structures of markets and market participants along the value added chain. Amongst others, the report contains a detailed analysis of the volumes of consumption arranged by sectors for 2011 and a forecast up to the year 2016.

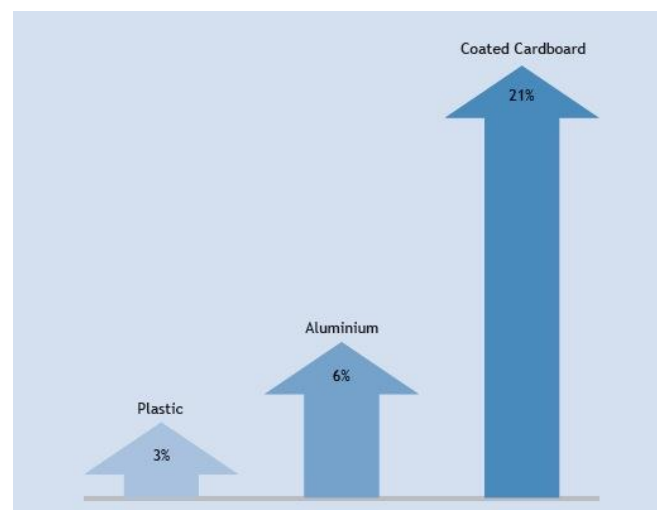
Results

The market report will help decision-makers to competently assess sectors, market participants, trends and development potentials for paper composites. Main focus is the strategic assessment as regards the future viability of individual markets and resulting courses of action for market players.

Overview of examined packaging materials

Packaging Group	Packaging Variants
Paper Composites	Paper/aluminium foil Paper/plastic foil Paper/wax coating Paper/ polymer coating
Cardboard Composites	Cardboard/aluminium foil Cardboard/ plastic foil Cardboard/ polymer coating
Other Materials	Paper/cardboard/mono Plastic foils/mono & composites Aluminium foils/mono & composites

Growth potential of trays in Germany 2016 in comparison to 2011 in %, reference: surface



How do you benefit from the report?

- Strategic decision-making support for corporate planning and product development due to well-founded market data
- Early identification of trends in the packaging sector, particularly in the area of paper composites
- Comprehensive market and competitive analysis of paper composites in Germany
- Unique description and quantification of as well as forecasts for paper composites sorted by application across all sectors
- Market transparency along the entire value added chain
- Benchmarking of all essential market players and competitors
- Strategic recommendations for action for an ideal market positioning
- Optional basis for further consultancy services according to your requirements

Key Questions

- How is the market for paper and cardboard composites developing?
- Which markets show declining tendencies and which are the markets with a growth potential?
- Which factors can be identified to drive material development?
- Which application markets show a potential for increasing the market shares of paper and cardboard composites?
- What is the market potential of renewable raw materials?
- What do the provider structures along the value added chain look like?
- Which factors of success and business models distinguish market and innovation leaders?

Content Elements (Abstract)

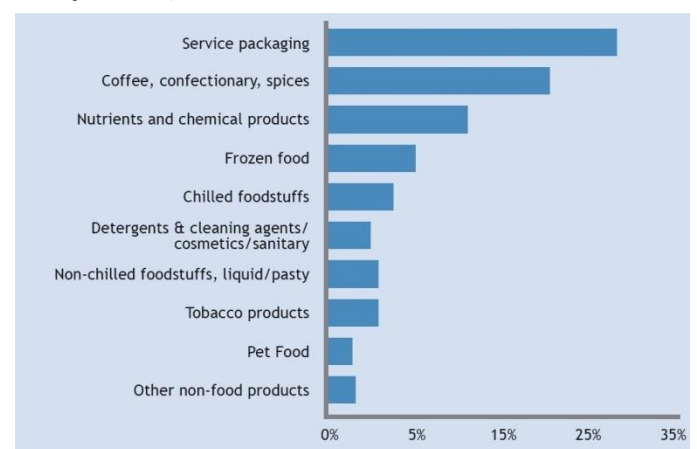
- Detailed market trends
- Content-specific and material trends, product examples and innovations
- Forecast up to 2016 and beyond: replacement potentials (paper composites and other materials)
- Competition analysis and company profiles of top players
- Formulated recommendations for action for an ideal positioning within the competition

Target Groups

The report is aimed at:

- > Paper manufacturers
- > Paper processors
- > Packaging manufacturers
- > Bottlers & Fillers
- > Manufacturers of packaging machinery
- > Companies requiring data as regards flexible packaging

Forecast 2016 for sales packaging made of paper composites, assortment share in %



List of Sectors

Coffee, cocoa, tea
Snack products
Confectionary
Spices, dry ready meals, processed foods, other dry products
Delicatessen, oil, vinegar, wet seasoning and sauces, spreads
Other foods (without drinks) non-chilled
Dairy products, chilled
Meat, sausages, fish, chilled
Other preparations and convenience food, chilled
Frozen food, ice cream
Service packaging, catering
Other service packaging
Pet food, pet supplies
Sanitary products and sanitary paper
Cosmetics and personal hygiene
Detergents and cleansing agents
Medical and pharmaceutical products
Tobacco products
Nutrients and chemical products
Household packaging
Release Liners

Market participants analysed in the report

Supplier	Packaging Manufacturer	Packer/Filler
Ahlstrom	Amcor	Bell AG
BASF	Behr Bircher Cellpack	Burger King
Bayer	Bischof + Klein	CFG Deutschland
Billerud	Cham Paper	Deutsche Tiernahrung
Birgl&Bergmeister	Constantia Flexibles	Deutsches Milchkontor
Cham Paper	Delfort Group	Fressnapf
Dow Chemical	Felix Schoeller	Friesland Campina
Dupont	Fislage Flexibles	Frosta
Epple Druckfarben	HLB	Gebr. Nölke
Flint Group	Huhtamaki	Iglo
Huber Group	Leeb	LSG
Innovia	Leipa Georg Leinfelder	Mars
Ruco Druckfarben	Maria Soell	McDonalds
SABIC	Mondi	Molkerei Müller
Sappi	Sappi	Nestlé
SCA	SFV	Nordsee
Siegwerk	Stora Enso	Oetker
Stora Enso	Walki Group	Rügenwalder Mühle
UPM	Willy Michel	Unilever
Zellstoff Stendal	Wipak	YUM! Restaurants



Table of Contents

1. Overview of results	9. Excursus: Release liner
2. General principles	10. Value Added Chain
2.1 Objective of the survey	10.1 Market significance of value chain stages in the production process
2.2 Object of investigation	10.2 Value creation trends
2.3 Methods	10.3 Excursus: RFID and Supply Chain Management
3. Status Quo paper composites 2011	11. Competitive analysis
3.1 German paper industry	11.1 Market players in the production process of paper composites packaging
3.2 Production, application, consumption	11.2 Sales ranking and market shares
3.3 Packaging consumption by product sectors and packaging material categories	11.2.1 TOP 20 Suppliers
4. Market development drivers	11.2.2 TOP 20 Packaging manufacturers
4.1 General economic setting	11.2.3 TOP 20 Fillers/Bottlers
4.2 Socio-demographic factors	11.3 Company profiles and strengths/weaknesses analysis
4.3 Commercial requirements	11.3.1 TOP 20 Suppliers
4.4 Statutory legislations	11.3.2 TOP 20 Packaging manufacturers
4.5 Consumer trends	11.3.3 TOP 20 Fillers/Bottlers
5. TOP sector issues	11.4 Identification of market and innovation leaders
5.1 Cost pressure	12. Strategic market analysis for paper composites
5.2 Material trends	12.1 Identification of entry barriers and EBIT target margins per TOP 5 product sector
5.3 Sustainability	12.2 Industrial structure analysis of the TOP 5 product sectors
6. Product innovations	12.3 Identification of market expulsion and market entry potentials per TOP 5 product sector
6.1 Chilled foodstuffs	13. Business model analysis
6.2 Dried foodstuffs	13.1 Analysis of success factors and business models of market and innovation leaders
6.3 Non-food products	13.2 Deduction of the ideal positioning within the competitive environment per TOP 5 product sector
7. Market forecast consumption paper composites 2016	14. Summary and strategic evaluation
7.1 Development of packaging volumes	15. Outlook
7.2 Packaging variants by product sectors	16. List of illustrations
7.3 Packaging shapes/types by product sectors	17. List of tables
7.4 Replacement potentials of various paper composites	
7.5 Replacement potentials as regards other materials	
7.6 Perspectives beyond 2016	
8. Strategic evaluation of individual product sectors	
8.1 Identification of TOP 5 product sectors	
8.2 Market matrix of TOP 5 product sectors	
8.3 Detailed results: data sheets specifying market development per TOP 5 product group	

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