

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: Paper packaging is increasingly replacing plastic packaging. As a renewable resource, paper has a positive *eco image* with both retailers and consumers. Further, paper entails a resource saving potential of 70%.

Objective and Methodology of the Report

The market research institutes GVM and sciendea+ examine the packaging market for paper composites in Germany. Basis for the market analyses are both the findings of GVM's research of the packaging market - continuously expanded for decades - and a current survey of decision makers and experts from all sectors concerned. The study offers a well-founded outline of present and future structures of markets and market participants along the value chain. Amongst others, the report includes a detailed analysis of consumption volumes by sector for 2011 and a forecast up to the year 2016.

Conclusions

The market report will help decision-makers to competently assess sectors, market participants, trends and development potentials for paper composites. Main focus is the evaluation regarding the future viability of individual markets. The market analysis offers recommendations on future strategic options.

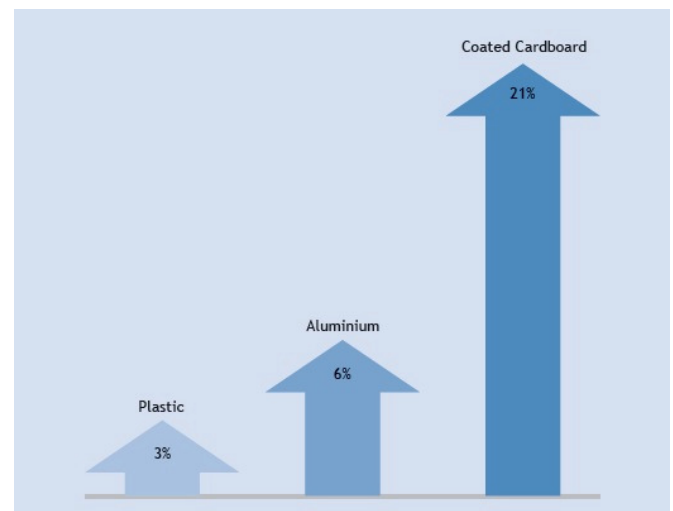
How do you benefit from the report?

- Strategic 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 on forecasts for paper composites by application across all sectors
- Market transparency along the entire value chain
- Benchmarking of all essential market players and competitors
- Strategic recommendations for an ideal market positioning
- Optional basis for further consultancy services according to your requirements

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



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 share of paper and cardboard composites?
- What is the market potential of renewable raw materials?
- How do the competitive landscape along the value chain look like?
- Which factors of success and business models distinguish market and innovation leaders?

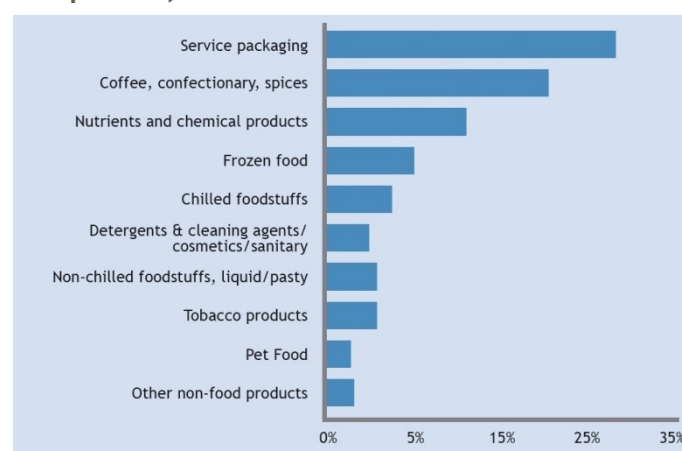
Key Elements (Abstract)

- Detailed market trends
- Goods sector trends, 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
- Recommendations for an ideal positioning within the competitive landscape

Target Groups

- The report is ideal for:
- > 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



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Contact partner for further information on the report

Anke Leighty (Project Manager)
GVM Gesellschaft für Verpackungsmarktforschung mbH
Alte Gärtnerei 1
55128 Mainz
Germany

Phone +49 (0) 6131.33673 25
Fax +49 (0) 6131.33673 50
a.leighty@gvmonline.de

Gesellschaft für Verpackungsmarktforschung mbH
Alte Gärtnerei 1
D-55128 Mainz

Phone +49 (0) 6131.33673 0
Fax +49 (0) 6131.33673 50
info@gvmonline.de
www.gvmonline.de

 Gesellschaft für
Verpackungsmarktforschung