

Show your metal



The Canmaker Summit was an invigorating reminder of the qualities of metal packaging, and a rallying call to communicate its leading role in a sustainable world. Mónica Higuera reports from Warsaw



Focus on the positives, and you'll start to see challenges as opportunities: that was the message from The Canmaker Summit held in Poland at the end of September.

Despite the doom and gloom of volatile markets, and rising energy and raw material costs, cans remain a competitive packaging solution thanks to their advantages through the supply chain, said experts from the aluminium, steel, coatings, canmaking and lobbying sectors.

They provided ample evidence. Metal is sustainability in action, not just words. In today's debates on carbon footprinting, resource and energy management, and emissions reductions, the can is well placed for the future, as long as the metal packaging industry takes responsibility for communicating its advantages and truly exploits the recycling card.

But the threat of ill-conceived regulations and perceptions exists and more resources and commitment are needed to counteract misleading campaigns by competing packaging materials.

The Canmaker Summit was a powerful reflection of the impact these fast-changing

times are having on the world's metal packaging companies, which in order to grow in the midst of financial crisis must either reinvent themselves, develop true innovations, or move into emerging markets.

Participants at the canmaking sector's annual conference heard directly from those who had succeeded in doing so and shared with delegates their experiences and lessons learnt, and they all highlighted the crucial role of communication, staff training, and understanding of processes.

Keynote speaker was **Stanislaw Wasko**, chief operating officer of Polish-based Can-Pack, who explained how the company is growing from a position as a regional canmaker serving the needs of global customers.

With sales forecast at US\$1.1 billion in 2008, Can-Pack is expanding into growth markets with beverage can plants being built in India, Russia and the UK, and is considering projects in the Middle East, Europe and Africa, Wasko told delegates.

Europe's largest market for beverage cans with more than eight billion filled by beer and beverage firms, the UK is no longer a mature market.

"The UK is behaving like an emerging market in terms of can growth," added **John Reves**, marketing director at Rexam. He also told delegates about Rexam's strategy to identify products that customers would aspire to, such as its Fusion lightweight aluminium bottle can which is being tested by drinks firms.

Reves admitted that the speed at which the lightweight aluminium bottle reached the market in Europe "won't be as quick as in Japan", adding that this was due partly to existing resistance innovation and change, and partly to being ready. "It is also



They came from across the world – Purchasing director of Mexico's Fábricas de Monterrey Juan José Sánchez Flores, Rasselstein's sales manager Thorsten Kolling with chief executive Dr Ulrich Roeske, and president of Fábricas de Monterrey Carlos Delgado Garza

Where does the energy come from for each type of raw material?

Source: U.S. EPA

	Aluminium%	Steel%	Glass%	PET%	HDPE%	LDPE%
Oil-based	2	6	2	3	33	33
Electricity	89	21	10	7	6	8
Coal	1	54	7	6	5	6
Natural Gas	9	19	80	42	51	47
Other	-	-	-	7	5	7

Aluminium's high electrical energy content makes it ideal for supplying from renewable sources such as hydro-electric power

our own wish. From a technical point of view, we don't want it to develop that quickly," said Revers.

In the Cans of the Year Awards the Fusion bottle received the Delegates' Choice prize, and Gold in the Prototype category.

Can of the Year winner in 2008, as judged by a group of industry experts, was the world's first commercially-available resealable drinks can made by Ball Packaging Europe.

The company's marketing manager **Uwe Stoffels**, who repeatedly expressed his love for cans, showcased in his presentation at the summit a selection of innova-

tions launched by Ball to enhance the can's position in the drinks market.

"Even with strong beverage can growth in Europe, canmakers still need to concentrate on bringing selective innovations to market," he said.

These included this year's winner – the resealable beverage can, widgets, thermochromic inks, lightweight bottle cans and digital printing, which Ball Packaging Europe is launching at the Brau trade fair in Germany in November, and is due to be commercial early in 2009.

High value added packaging is moving rapidly into Eastern Europe, added **Ralph Lambert**, vice president for the region at

Opposite: Toast for metal's success – Chief executive of Impress Francis Labbé, The Canmaker's new editor Mónica Higuera, and president of Crown Europe Chris Homfray

Right: President of Iran's Eram Noush Soft Drinks, Reza Abarghoei



Crown Bevcan.

He presented the background of Crown's operations in the region where since 1993 it has set up food can operations in Hungary, Slovakia, Poland and Russia by following customers such as Bonduelle and Nestlé, which are using added-value features like peelable membrane ends and shaped cans for their products.

Crown is also building its first beverage ►

THE CANMAKER SUMMIT

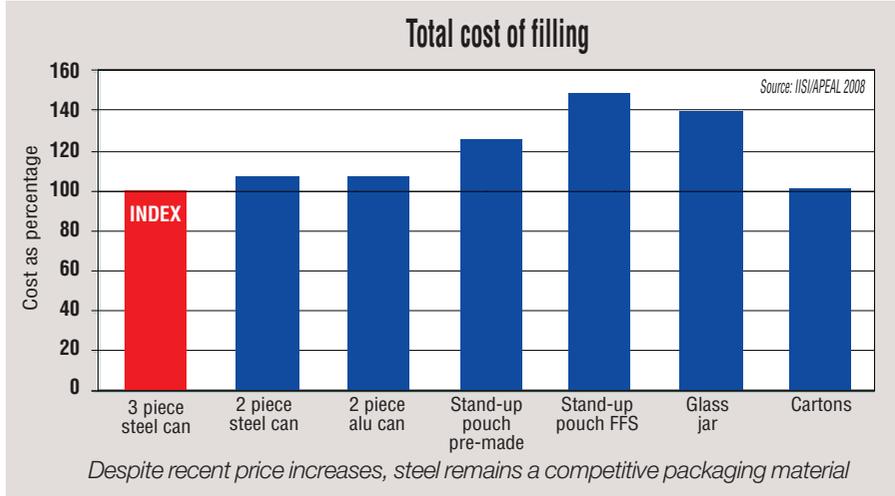
can plant in Eastern Europe which is due to start up in the fourth quarter of 2009. The plant will be constructed at Kechnec in eastern Slovakia with one production line having capacity to make 750 million cans a year.

Coatings companies are also facing the need for reinvention. **Bern Ouimette**, president of Valspar Europe, talked of energy "as a compass for technology decisions" and of how the company is developing coatings products accordingly.

Valspar is focusing on water-based coatings to achieve material and process savings, he said, like lower bake temperatures and lower film weights. The company has also launched ValFlex, laminate and extrusion films, and Vecodur powder coatings as used in aerosol cans for Aquafresh's toothpaste.

The cost pressures within the aluminium and steel industry and their implications for future price movements were addressed by **Uday Patel**, aluminium consultant at CRU Analysis, and **Dr Ulrich Roeske**, chief executive of German tinplate maker Rasselstein.

Patel began by reminding the audience that there had been a "significant downgrading of global growth prospects" since the start of the year. There is now greater



concern in rising inflation and even more so in emerging countries, he added.

He described a short term softening in aluminium prices, led by a weaker economic outlook and investor nervousness, which should provide a buying opportunity for consumers of aluminium at \$2,300-2,400 a tonne.

But underlying cost pressures within the aluminium industry will provide a historically high floor price, he said, while rising power costs will limit the ability of the

primary aluminium sector to invest even in 'low cost' regions.

For tinplate, a new floor is also being defined by costs which put hot-rolled coil contract prices at a new higher level, said Rasselstein's Roeske. And that requires the introduction of revised contracts and price increases.

Despite price increases, Roeske stressed that steel remains a competitive packaging material thanks to its advantages across the supply chain.

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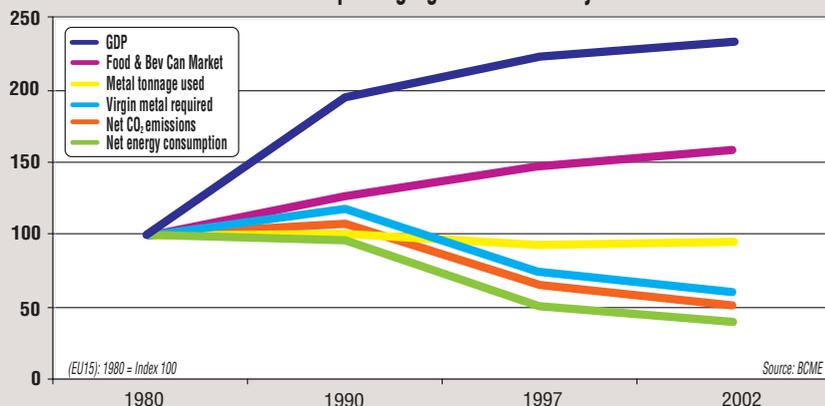


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Metal packaging's sustainability facts



While the use of food and beverage cans has grown, canmakers have cut the use of virgin metal and energy consumption, and halved carbon dioxide emissions

Rasselstein, which employs 2,400 at its single mill in southern Germany with an annual output of more than 1.5 million tonnes, is concentrating on the quality and process advantages of packaging steel, and its competitiveness.

New steel grades are providing added value, he said, with high formability steels for drawn and shaped cans and reduced opening forces for easy-open ends, further proving that packaging steel is a modern

and ecological material.

The outlook for canmaking is that of growing profitability, according to **Arthur Stupay**, president of Tower Research in the US.

Stupay reminded delegates that without a strong can industry, the major beverage customers would suffer. Cans, he said, "help soft drinks and beer customers realise profit goals."

Stupay's forecast included rising

demand. The can is after all a "recession resistant" product that enables consumers to maintain a standard of living. At the same time, products associated with growing economies, such as luxury goods, foods and beverages are experiencing strong demand.

Continual productivity improvements, new materials and recycling should also help towards a brighter future. "I don't think I'm dreaming," said Stupay. "I believe this is a likely scenario."

Tools for continuous productivity improvement were also discussed. **Amir Novini**, president of Applied Vision in the US, discussed how intelligent inspection systems help canmakers reduce spoilage, improve yield and quality.

The company's vision inspection technology features timely process information to maximise quality, throughput and reduce spoilage.

The commissioning of new canmaking plants on time to meet market demand is also a process, and the speciality of US-based systems integrator Roeslein & Associates. Its president, **Rudi Roeslein** said: "Our project management process, like canmaking itself, is a process, with a sequence that must be maintained if the outcome is to be predictable." ▶

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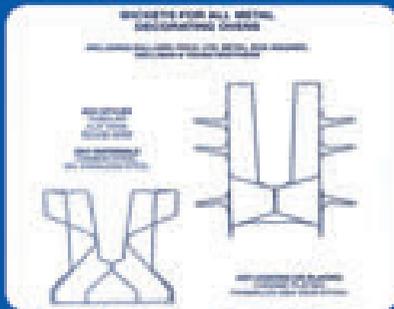
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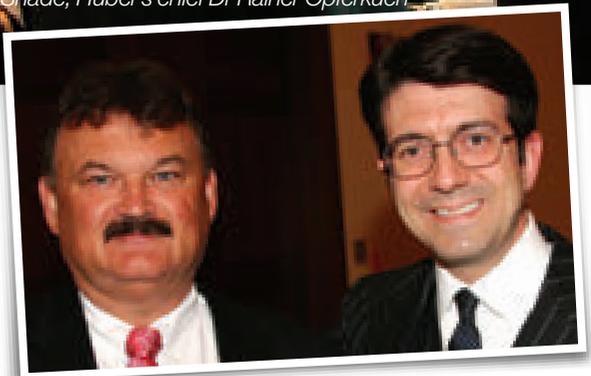


An impromptu EMPAC meeting – (clockwise from left) ArcelorMittal Packaging's communications manager Catherine Jung, Rasselstein's communications director Volker Lauterjung, Impress's chief Francis Labbé, Corus Packaging Plus managing director Hugo Loudon, ArcelorMittal Packaging's commercial chief Guillaume de Formanoir, Corus's marketing manager Roger Steens, Rasselstein's chief executive Dr Ulrich Roeske, Impress' communications director Gordon Shade, Huber's chief Dr Rainer Opferkuch and Crown Europe president Chris Homfray

Right: Roeslein's president Rudi Roeslein and Peter Giorgi, vice president of Can Corporation of America

Below: The Brazilian delegation included Brasilata's chief Antonio Teixeira and sales managers Gelson Dahmer and Monica Anderson

Opposite: President of China's Suzhou Slac Precision Equipment, Shu An



Since 1990, the company has installed more than 60 canmaking lines in over 30 countries, and has developed "unitising systems" aimed at minimising installation issues and bringing entire can lines up to high efficiencies within the budgets and time constraints placed.

But it hasn't always been easy and Roeslein shared with delegates the history of his company, including when in 2000 and 2001 they became "a pack of wolves surviving on mice".

Roeslein came out the other end much leaner and mindful of the fact that a downturn happens every ten years or so.

The company's latest projects are the installation of beverage can plants in Angola, for Nampak, and in Nigeria, which will have technical support from Rexam.

Lobbying initiatives by European industry groups were also at the core of The Canmaker Summit this year.

Executive director of Beverage Can Makers Europe (BCME), **Bill Duncan**, told delegates about full Life Cycle Inventory studies that the group had commis-

sioned, which are soon to be finalised, and are aimed at ensuring that the can's sustainability credentials are understood and appreciated.

One of the studies assesses the environmental impact of canmaking's supply chain, from raw material through to recycling. The other LCI study, is a carbon footprint distribution study to evaluate transport related carbon-dioxide emissions of different forms of filled drinks packaging.

European Metal Packaging, or EMPAC, is meanwhile lobbying actively in the UK and the Netherlands, and is starting in France and Germany. It is also in the final stages of creating a carbon footprint





scorecard.

EMPAC is comprised of food and general line can-makers and European packaging steel group Apeal.

Its chairman **Francis Labbé**, chief executive of Impress, concluded

with a rallying call to raise resources and manpower to communicate metal packaging's attributes to the right audience.

The association's budget is 800,000 euros, or 0.01 percent of combined sales of the food and general line canmaking industry in Europe, he explained. Although this is eight times larger than the budget of its predecessor, Sefel, it pales in comparison with a recent two-week campaign in Italy by Tetra which cost 8.5 million euros, he said.

An additional threat for the sector is the perceived low quality of canned food. Labbé called on customers to improve their recipes. "Heinz grew 12 percent by investing in its recipe and marketing, not in the can."

He encouraged the audience to convey smart messages, making use of existing assets, such as their own transport fleets, to promote metal packaging.

Trucks shipping metal packaging in Europe (excluding beverage) cover 80 million kilometres a year, he said, or 100 trucks a day between Warsaw and London, providing a mobile poster campaign.

It is in the midst of these challenging times that the metal packaging industry may well have the best chance ever to shout about its true worth.



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