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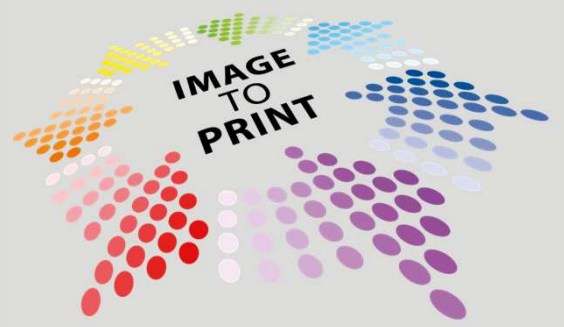

Image-to-Print

Rotogravure Technology & Innovation Days

Janoschka | 31.11.-01.12. 2011 | Indonesia

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Flexible Packaging Market in the Asia Pacific Region

Markus Stegmann
Consultant, Janoschka

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The Big Numbers – Macro Data…

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We are 7,000,000,000

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60% Living in Asia

Continent	Area (km²)	Area (mi²)	Percent of total landmass	Total population	Percent of total population	Density People per km²	Density People per mi²	Most populous city (proper)
Asia	43,820,000	16,920,000	29.5%	4,164,252,000	60%	95.0	246	Shanghai, China
Africa	30,370,000	11,730,000	20.4%	1,022,234,000	15%	33.7	87	Lagos, Nigeria
North America	24,490,000	9,460,000	16.5%	542,056,000	8%	22.1	57	Mexico City, Mexico
South America	17,840,000	6,890,000	12.0%	392,555,000	6%	22.0	57	São Paulo, Brazil
Antarctica	13,720,000	5,300,000	9.2%	1,000	0.00002%	0.00007	0.00018	Villa Las Estrellas, Chilean claim
Europe	10,180,000	3,930,000	6.8%	738,199,000	11%	72.5	188	Istanbul, Turkey
Australia	9,008,500	3,478,200	5.9%	29,127,000	0.4%	3.2	8.3	Sydney, Australia

Source: United Nations

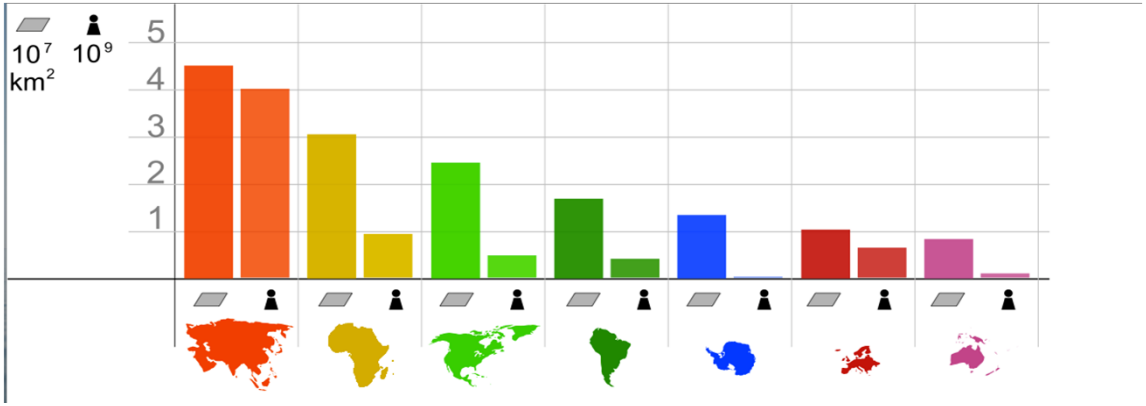

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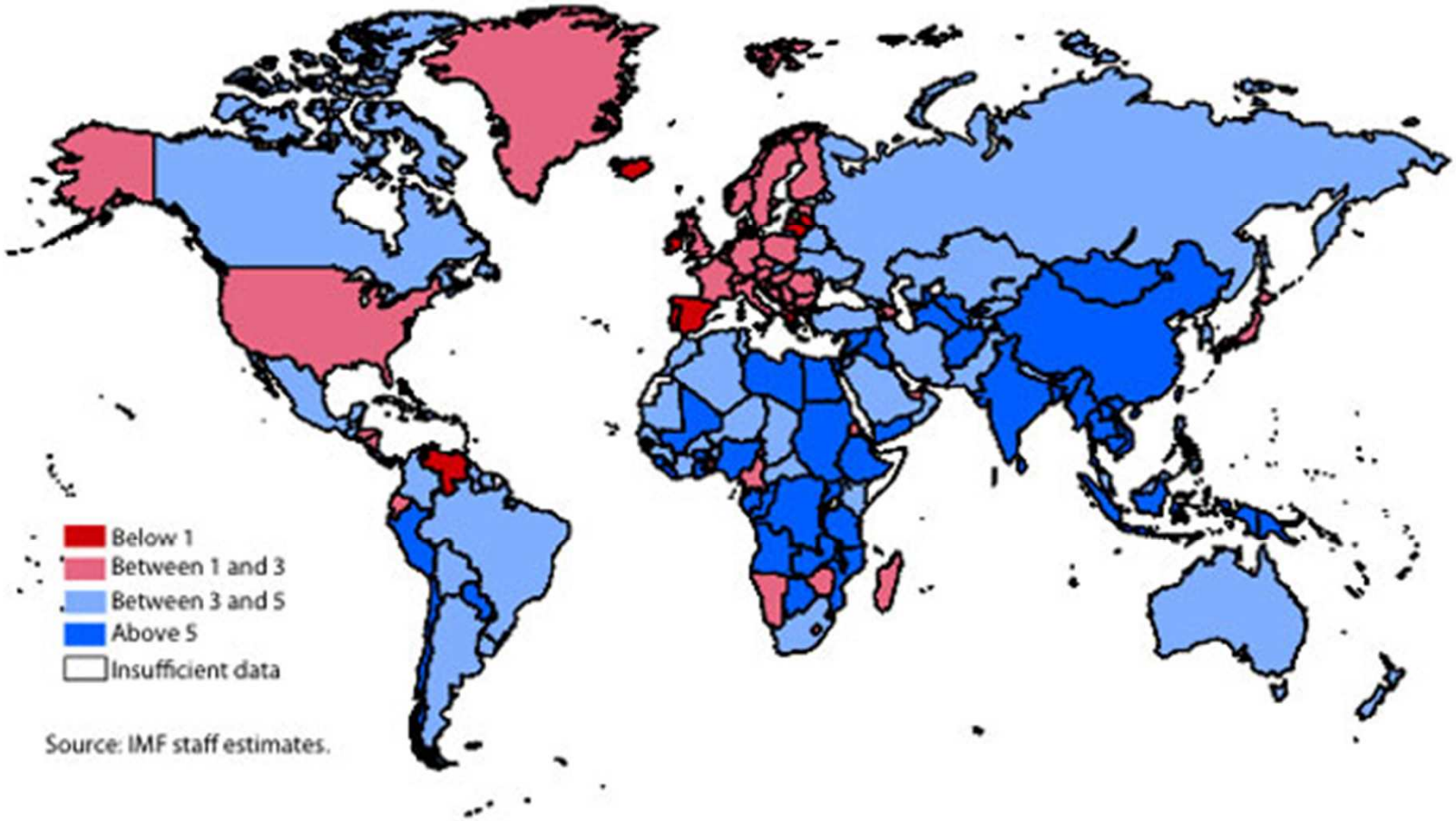
Figure 2.1. Average Real GDP Growth during 2010–11
(Percent)



Source: IMF staff estimates.

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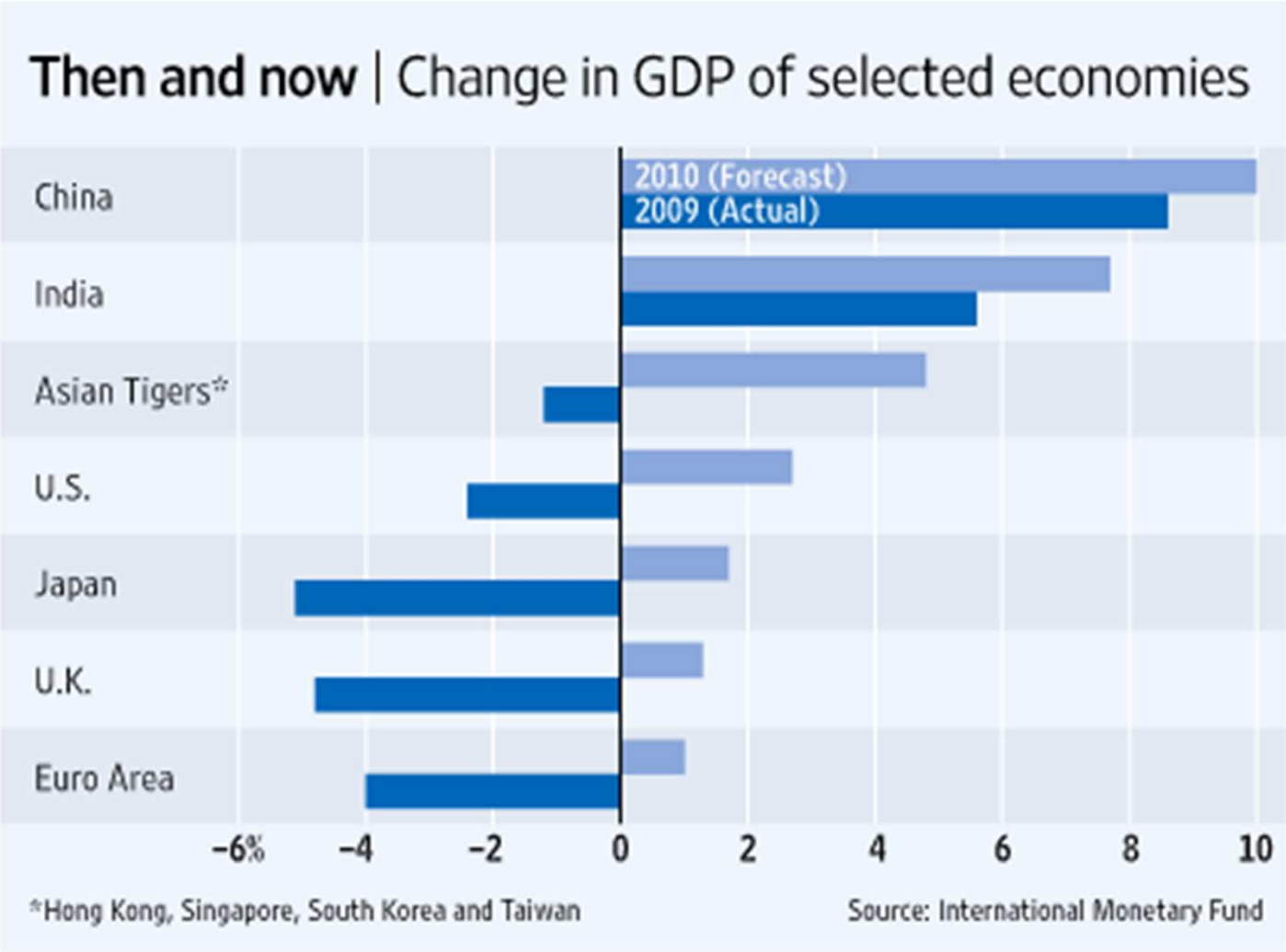
Then and now | Change in GDP of selected economies
China
India
Asian Tigers*
U.S.
Japan
U.K.
Euro Area
2010 (Forecast)
2009 (Actual)
-6%
-4
-2
0
2
4
6
8
10
*Hong Kong, Singapore, South Korea and Taiwan
Source: International Monetary Fund

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The Retails Sectors – Heart and Soul of Packaging

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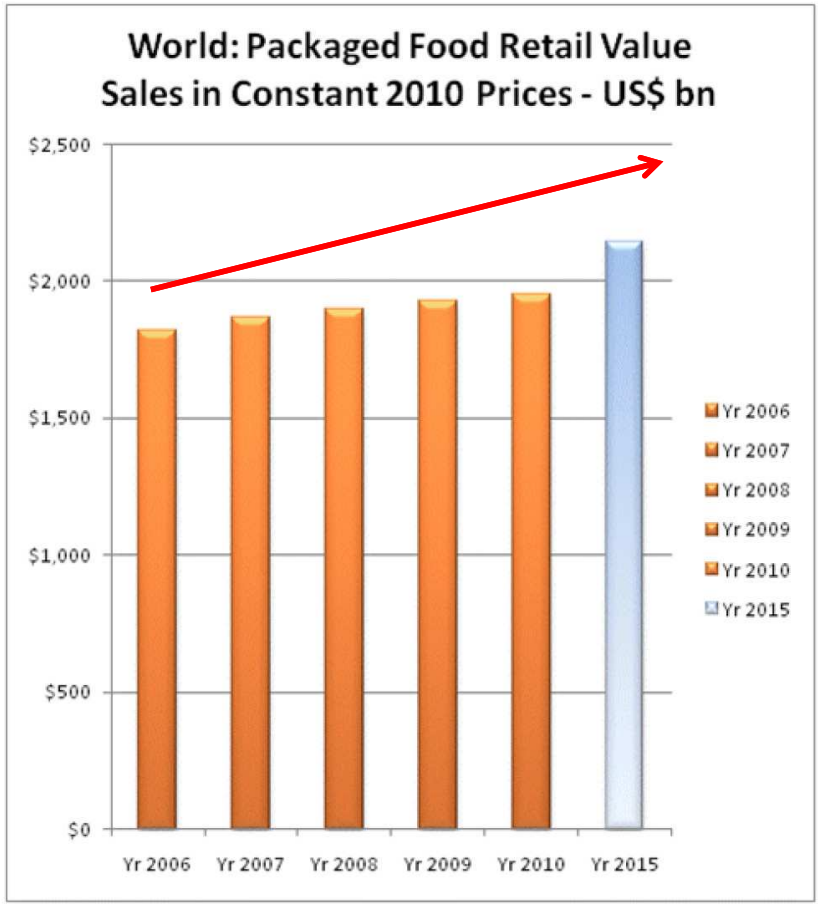
Packaged Food: Global Retail Value Performance

- Global retail value sales are expected to top US$1.95 trillion this year at present exchange rates
- Real growth of 7% since 2006, representing global increase of $132 billion through 2010.
- Global value growth from 2010-2011 is expected to be 1.7%, weighed down heavily by the slow economic recovery and lagging growth in developed markets.
- However, retail value sales forecast to exceed $2.14 trillion in 2015, an increase of nearly 10%.



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Developing markets lead growth from 2006-2010

Market Sizes • Historic • Retail Value RSP • US$ mn • Constant 2010 Prices • Fixed 2010 Exchange Rates • Period Growth

Key: Related Reports | Related Comment | Company Shares | Brand Shares | Distribution | Products by Ingredient

	2006-10 %	2006-10 CAGR %	2006-10 Absolute
Packaged Food			
World	7.2	1.8	131,843.1
Asia Pacific	10.8	2.6	44,488.0
Latin America	15.7	3.7	32,827.1
Western Europe	2.8	0.7	16,014.8
North America	4.0	1.0	14,536.8
Eastern Europe	8.2	2.0	12,084.1
Middle East and Africa	9.6	2.3	8,300.3
Australasia	11.3	2.7	3,592.1

Category definitions | Calculation variables

Sources:
1. Packaged Food: Euromonitor from trade sources/national statistics

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- Asia Pacific, Western Europe, and Latin America with largest value growth since 2006; North America trails most others in value growth.
- Asia Pacific & Latin American have combined for 58% of global value growth in constant terms since 2006; Asia Pacific's growth tripled that of North America.
- The same regions also showed the greatest growth in volume terms -- marking them as potential opportunity zones for US exports.

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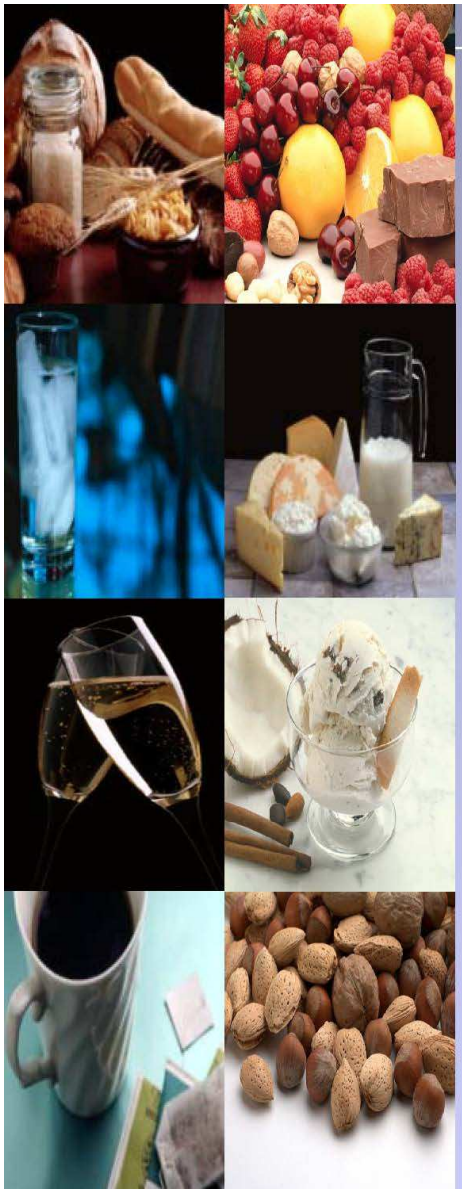
leaders in global consumer market intelligence



Packaged Food Trends

In Asia Pacific

- Biggest Sectors
- Strongest Growth
- Key Growth Drivers

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Traditional - Unpackaged

New - Packaged

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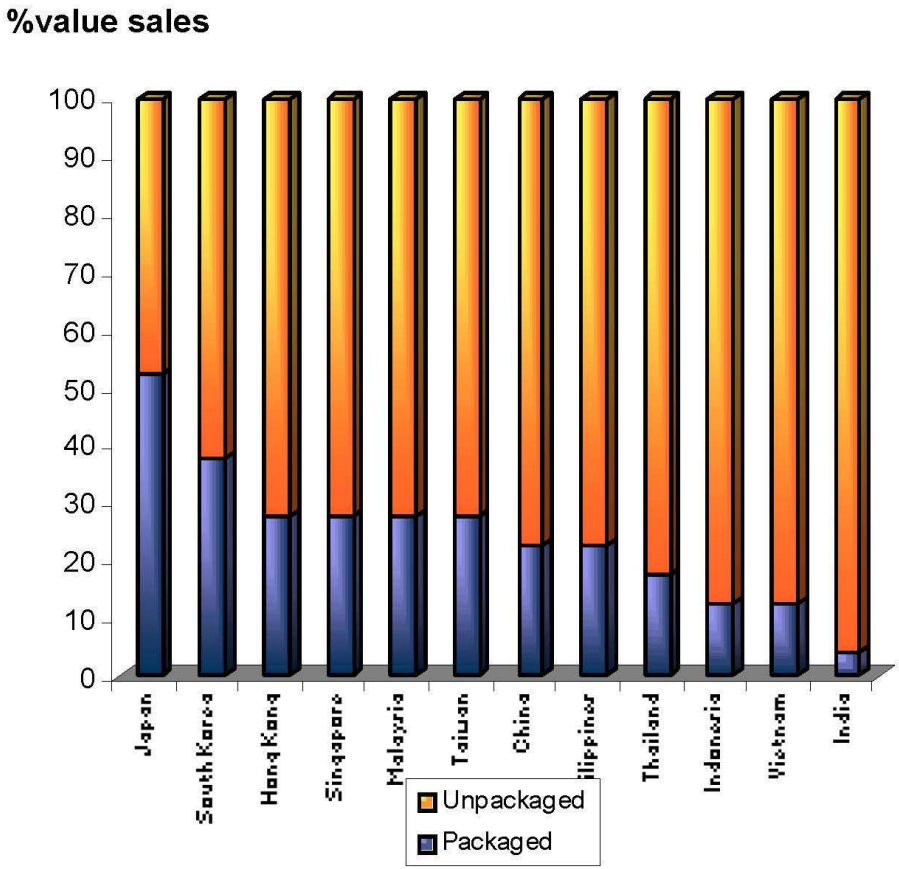
Asia Packaged vs Unpackaged Foods Sales



Enormous potential for packaging

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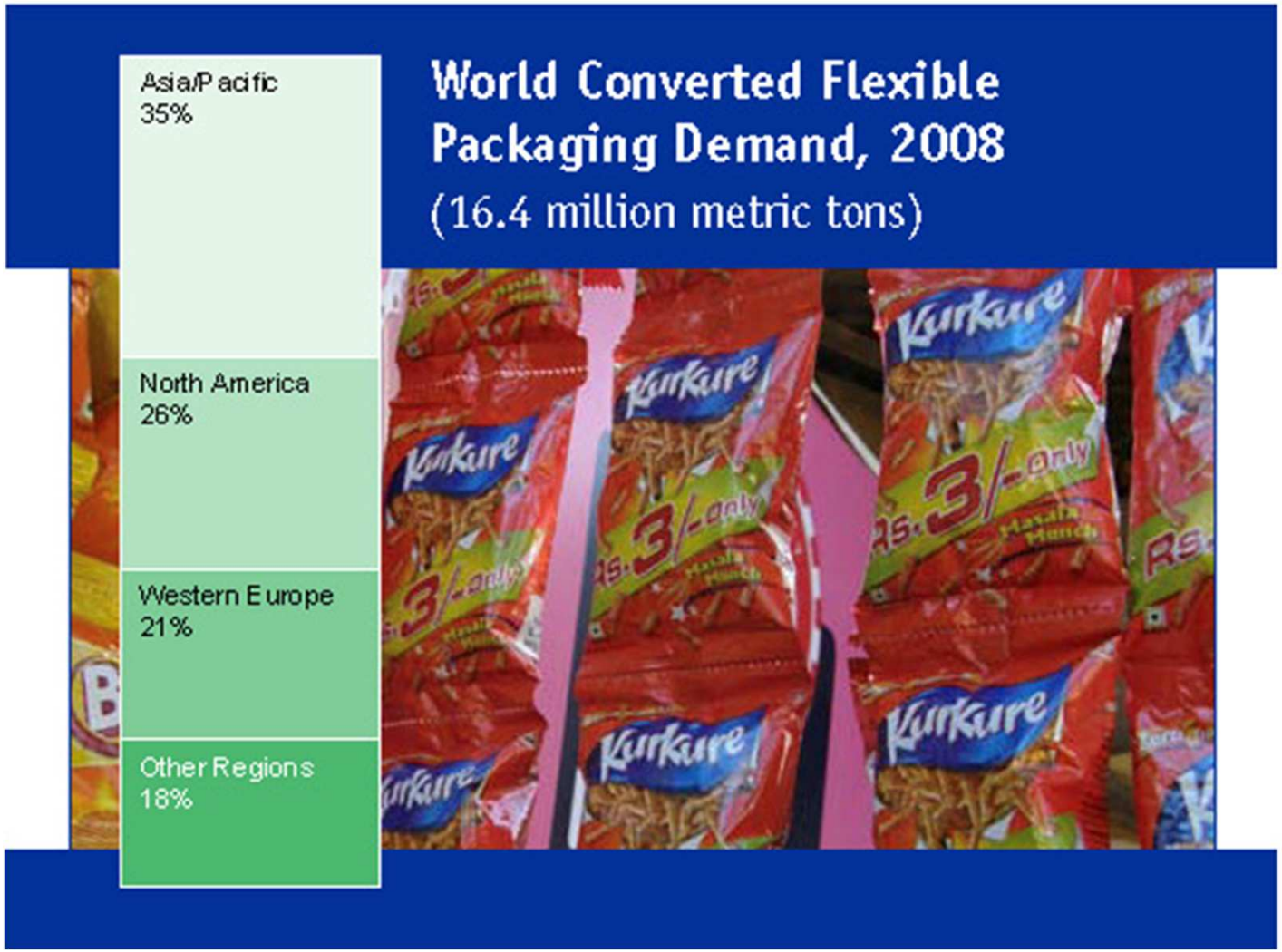

Source: Freedonia

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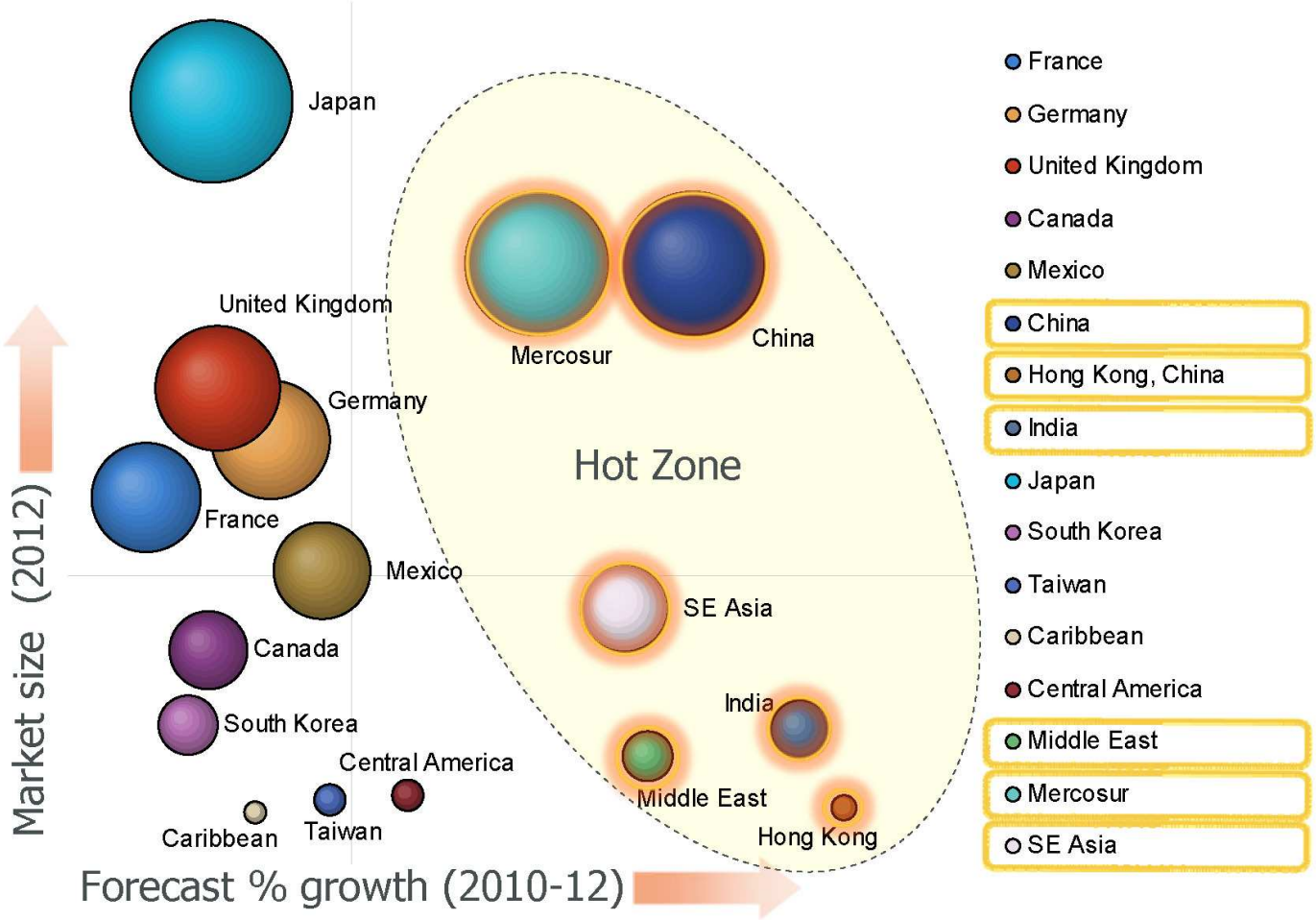
Key Export Growth Markets



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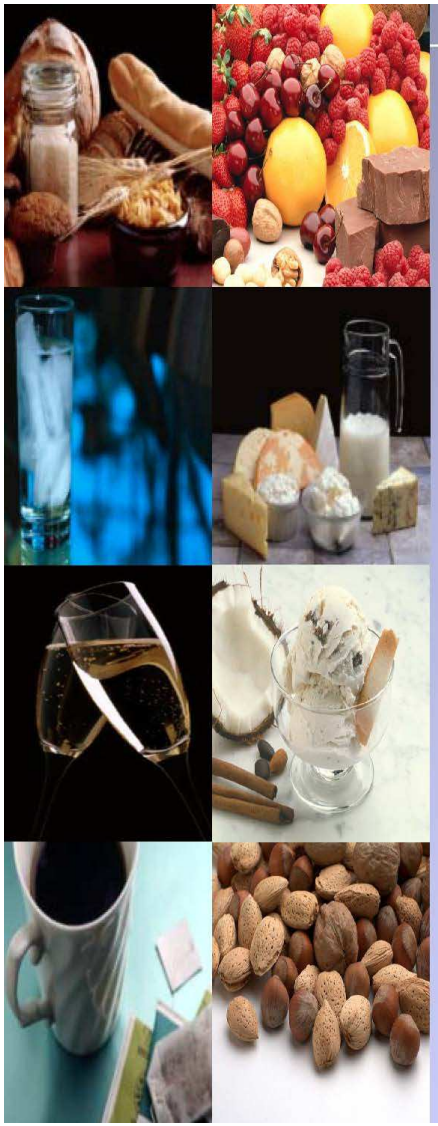

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Leading players - Asia

- Nestlé SA
- Ting Hsin International Group
- Lotte Group
- Unilever Group
- Uni-President Enterprises Corp
- Indofood Sukses Makmur Tbk PT
- Kuok Oils & Grains Pte Ltd
- Danone, Groupe
- Seoul Dairy Cooperative
- Nong Shim Co Ltd

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The Local Scene: Indonesia Packaging Category Data

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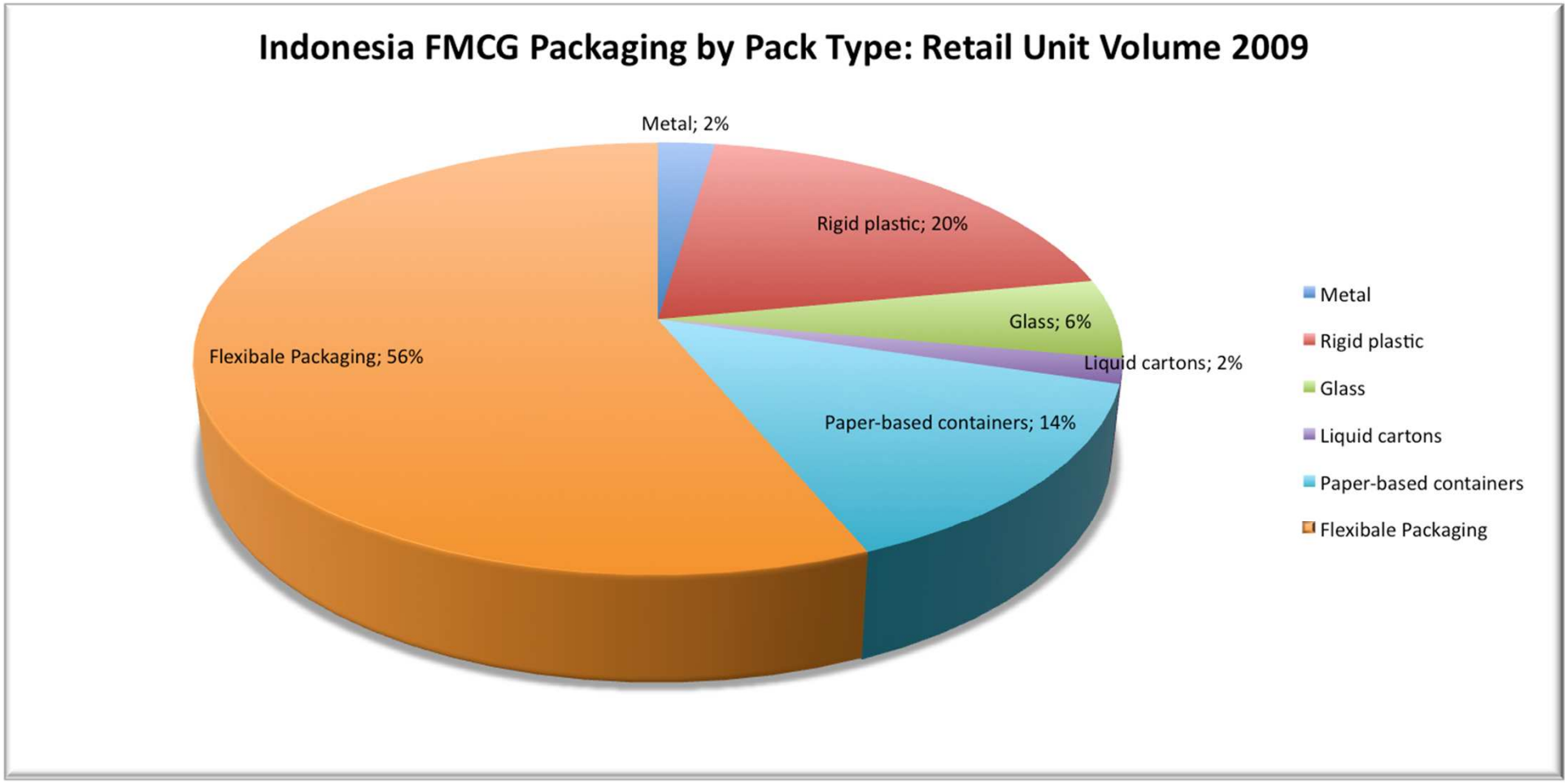

Source: Euromoniotr International

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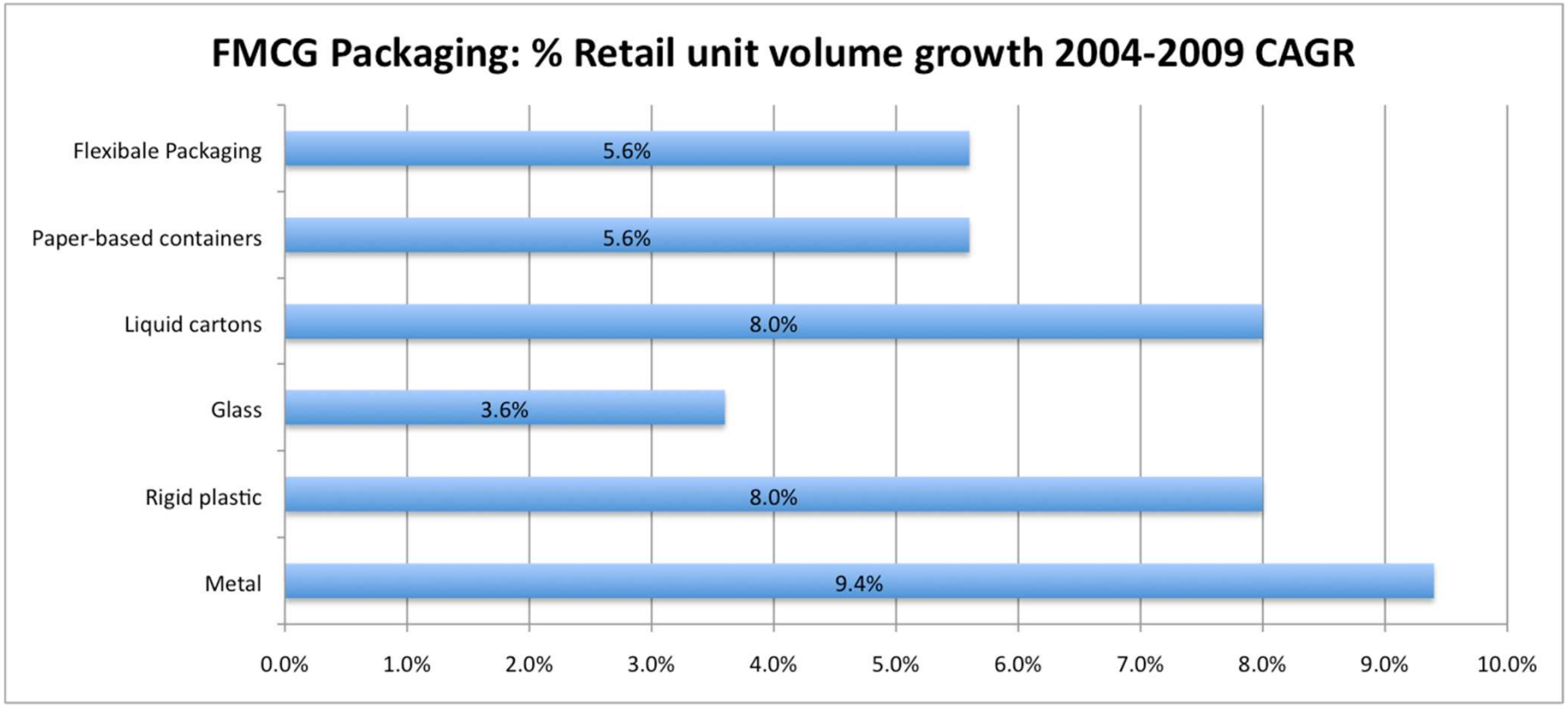
FMCG Packaging: % Retail unit volume growth 2004-2009 CAGR
Flexibale Packaging
5.6%
Paper-based containers
5.6%
Liquid cartons
8.0%
Glass
3.6%
Rigid plastic
8.0%
Metal
9.4%
0.0%
1.0%
2.0%
3.0%
4.0%
5.0%
6.0%
7.0%
8.0%
9.0%
10.0%

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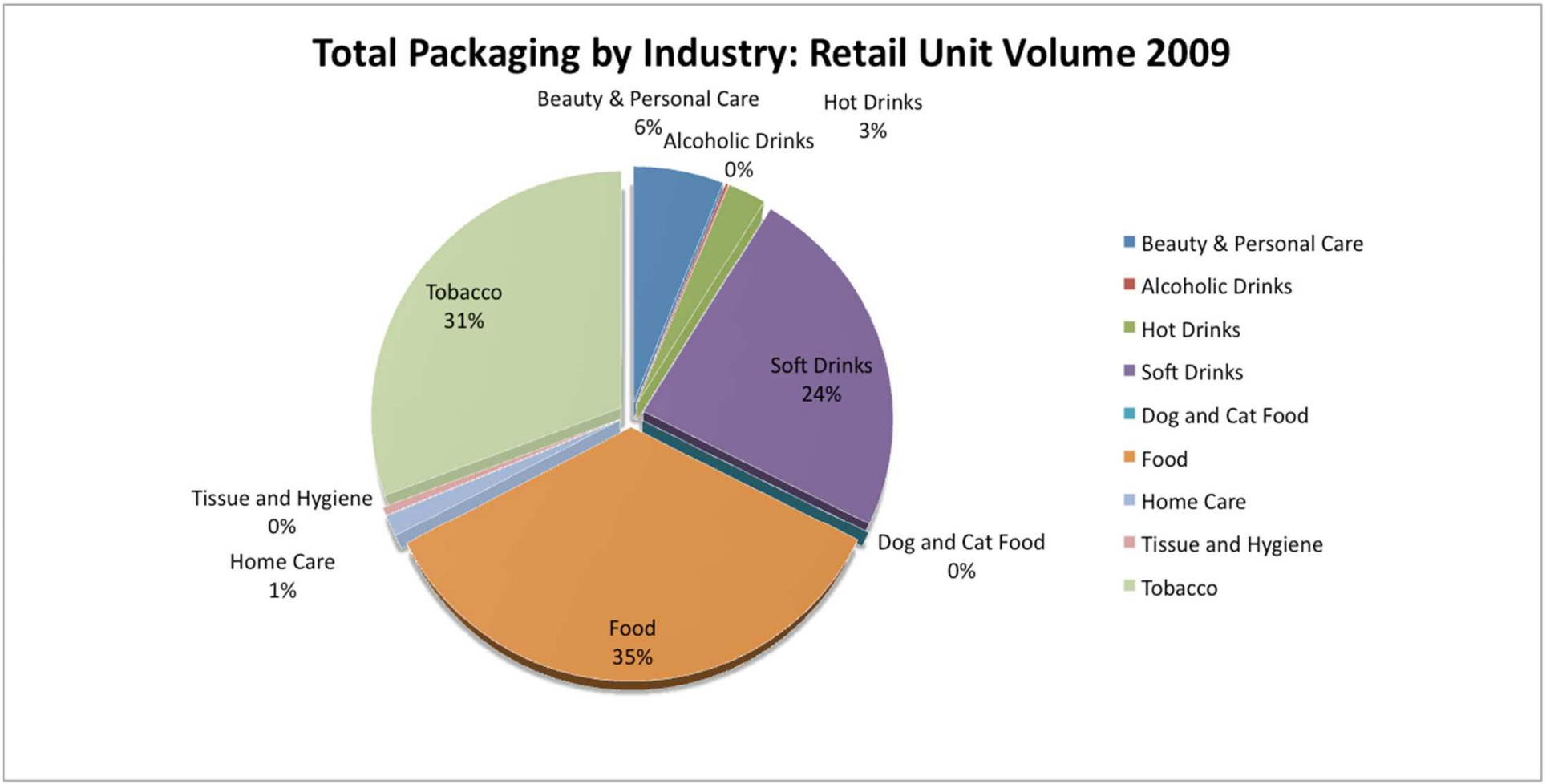
Total Packaging by Industry: Retail Unit Volume 2009
Beauty & Personal Care 6%
Alcoholic Drinks 0%
Hot Drinks 3%
Soft Drinks 24%
Dog and Cat Food 0%
Food 35%
Home Care 1%
Tissue and Hygiene 0%
Tobacco 31%
Beauty & Personal Care
Alcoholic Drinks
Hot Drinks
Soft Drinks
Dog and Cat Food
Food
Home Care
Tissue and Hygiene
Tobacco

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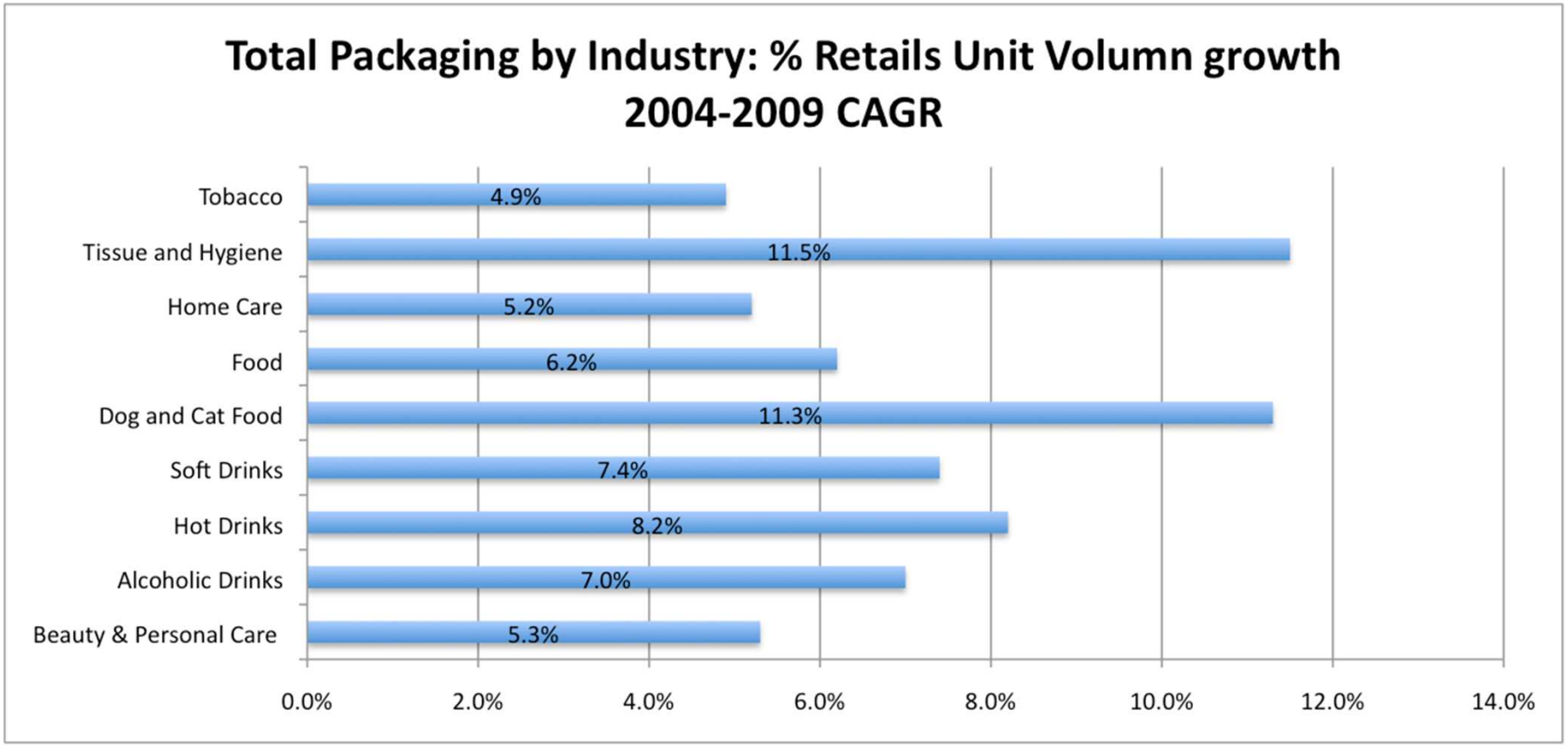
Total Packaging by Industry: % Retails Unit Volumn growth
2004-2009 CAGR
Tobacco
Tissue and Hygiene
Home Care
Food
Dog and Cat Food
Soft Drinks
Hot Drinks
Alcoholic Drinks
Beauty & Personal Care
4.9%
11.5%
5.2%
6.2%
11.3%
7.4%
8.2%
7.0%
5.3%
0.0%
2.0%
4.0%
6.0%
8.0%
10.0%
12.0%
14.0%

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Packaging Trends in Asia: Key Drivers

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Convenience

Instant

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Value for Money

Multi-Pack

Less Premium

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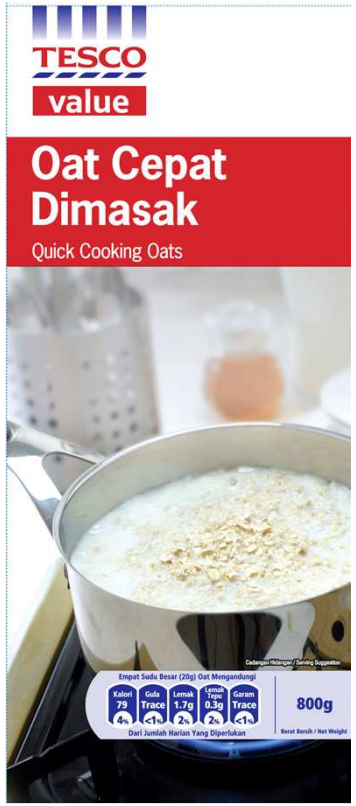
Value for Money

Promotion



Generic

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Health Conscious

Organic **Weight Management** **Sport related**

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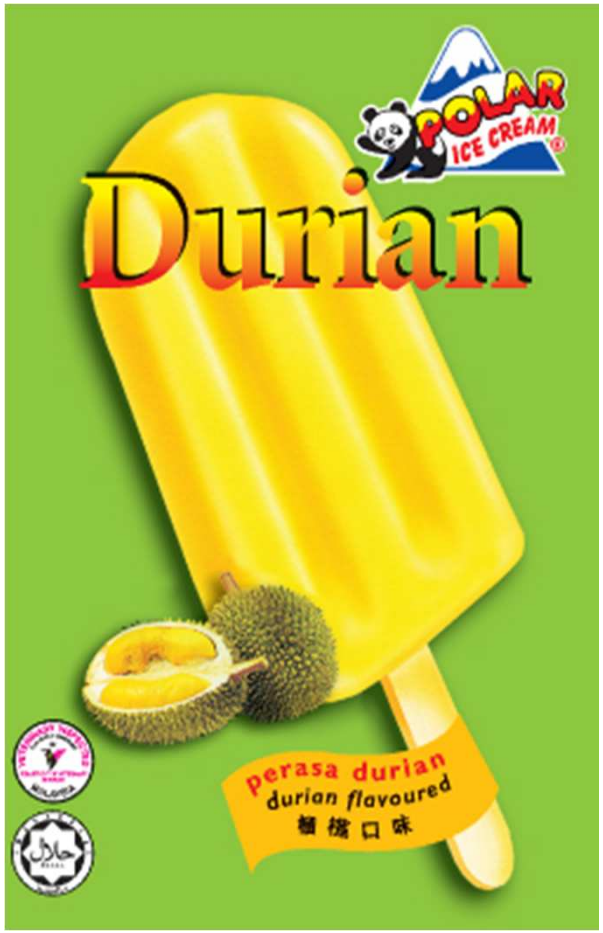
Tasty/Exotic



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Environmental

Boots

Boots cares

Pharmacist always available for you

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Environmental

"Save Water Life" sticker on Attack packaging by KOA Indonesia

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Example of Innovative Packaging

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Caso de estudio:

“Detergente Ariel LA”

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1° Stage : Baseline

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2° Stage : Baseline + fragances

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3° Stage : Baseline + fragances & sensations

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4° Stage : with Glamour

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ARIEL
XIANILLOS
LAVADO A MANO Y SEMIAUTOMÁTICO
CONT. NET. 6 kg
Revita Color
Downy
Tango
BAJA ESPUMA
ULTRA BLANQUEADOR
Flor de Luna
PUREZA SILVESTRE
Elegance
PODER LIMÓN
Sábila
CONSERVE FORA DO ALCANCE DAS CRIANÇAS
XIANÊIS
1 kg
REMOVE ATÉ MANCHAS SECAS USANDO MENOS ÁGUA
XIANÊIS ECOMAX
Ayuda a salvar vidas hoy

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Liquidos

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“Packaging is the only handshake a product has with the customer”

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Thank you
for your attention