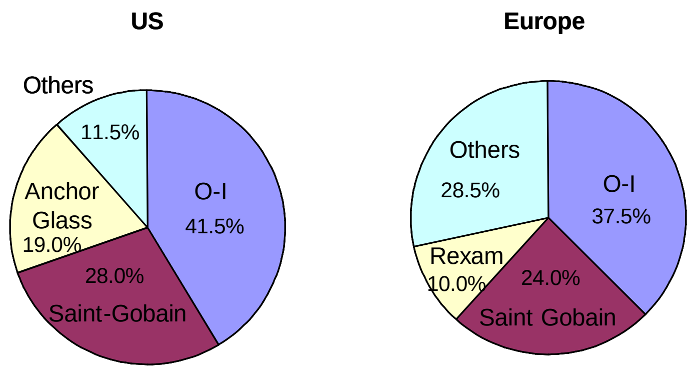
BUSINESS INSIGHTS

The Top 10 Food and Drinks Packaging Companies

Key strategies for market growth and future innovation

New Food and Drinks Report - Published June 2007

Europe and US glass packaging market share 2006



Source: The Top 10 Food and Drinks Ingredients Companies

"The glass packaging industry is highly consolidated and is dominated by Owens-Illinois (O-I) and Saint-Gobain with global market shares of around 30-32% and 19-20% respectively. O-I is a leader in the US with a market share of approximately 41.5% in glass packaging. Its main competitor in the US is Saint-Gobain with a market share of approximately 28.0%. Outside the US, the company faces competition in the glass containers segment from Saint-Gobain in Europe and Brazil, Ardagh plc in the UK, Vetropak in the Czech Republic and Amcor Limited in Australia. O-I has a market share of around 37.5% in the European market followed by Saint-Gobain..."

Assess the performance of leading food and drinks packaging companies, identify their strengths and weaknesses and learn from their growth strategies with this new management report...

Business Insights

Business Intelligence for the Consumer Goods Industry

Business Insights' portfolio of consumer goods management reports are designed to help you make well informed and timely business decisions. We understand the problems facing today's consumer goods executives when trying to drive your business forward, and appreciate the importance of accurate, up-to-date, incisive product, market and company analysis. We help you to crystallize your business decisions.

The **strength of our consumer goods research and analysis** is derived from access to unparalleled databases and libraries of information and the use of proprietary analytic techniques. Business Insights reports are authored by independent experts and contain findings garnered from dedicated primary research. Our authors' leading positions secure them access to interview key executives and to establish which issues will be of greatest strategic significance for the industry.

Our consumer goods portfolio of reports can be used across a wide range of business functions to assess market conditions and devise future strategies and cover the **food, drink, health, cosmetics, toiletries, dairy** categories and **key consumer issues** including **eRetail** and **marketing**.

Some key questions answered by this report...

Rexam business segment revenues, £m, 2003-2006

£m	2003	2004	2005	2006
Beverage Cans	2,503.00	2,069.00	2,235.00	2,490.00
Plastic Packaging	496	527	471	720
Glass	-	380	405	437
Other	187	105	126	91
Total	**3,186.00**	**3,081.00**	**3,237.00**	**3,738.00**

Source: The Top 10 Food and Drinks Packaging Companies

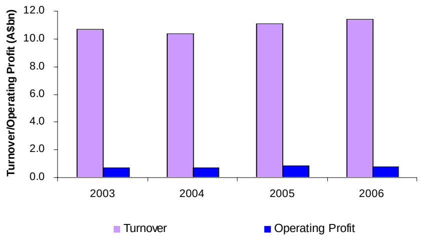
"Rexam's glass division contributed 11.7% to total revenues of the company. Revenues increased by 7.9% year-on-year to £437.0m ($805.4m). The factors contributing towards growing sales include increases in prices of glass containers along with efficient product mix and higher volumes. The European market is gradually stabilizing in this segment which will further lead to better returns in the future. Operating profit for the segment remained constant at £36.0m..."

- Who are the top 10 players in the global food and drinks packaging market and how are they performing?
- What are the key trends emerging in the global food and drinks packaging industry?
- Which growth and innovation strategies are being used by the top 10 players in the global food and drinks packaging industry?
- How do the leading packaging players compare in terms of market positioning?
- What were the most interesting and innovative products launched recently by the leading players?
- Which geographical markets are the leading players increasingly focusing on?
- What are the new technologies that packaging companies are looking to utilize in the future?

The Top 10 Food and Drinks Packaging Companies

Key strategies for market growth and future innovation

Amcor financial performance



Source: The Top 10 Food and Drinks Packaging Companies

"Amcor recorded revenues of A$11.4bn ($8.6bn) in the financial year 2005-06, registering an increase of 3.1% over the previous year. The growth was mainly driven by Amcor's PET Packaging and Sunclipse business. However, the performance of Amcor's Asia business had a slightly negative impact due to lower earnings in the Amcor Australasian fiber operations and a higher interest expense..."

The packaging industry is undergoing fundamental changes. Significant M&A activity is currently occurring in the market as the industry consolidates. In addition, new convenience trends, RFID and non-rigid packaging are driving innovation and NPD, whilst many companies are looking to new markets for growth.

The Top 10 Food and Drinks Packaging Companies: Key strategies for market growth and future innovation is a new report published by Business Insights that analyzes the innovation and growth strategies of the top 10 players in the packaging industry. This report identifies the product areas that the top 10 players are seeking to develop and also highlights the geographical markets where each individual company is looking to grow. It also examines the comparative strengths, weaknesses, opportunities and threats facing the world's leading packaging companies.

Assess the food and drinks packaging market competitive landscape and benchmark the performance and strategies of its leading players with this new report.

This new report will enable you to...

Rexam business segment revenues, £m, 2003-2006

Source: The Top 10 Food and Drinks Packaging Companies

"In October 2006, Ball launched Fusion-Tek, a new microwavable steel can. The can, which uses recycled steel, has a plastic bottom. A normal steel food can does not heat in the microwave because microwave energy cannot pass through steel, but Fusion-Tek's plastic end allows microwave energy to pass through the product inside the can, heating it quickly and evenly in 2-3 minutes..."

- **Create more effective competitive strategies** based on this report's SWOT analyses of the top 10 food and drinks packaging companies.
- **Benchmark the world's leading food and drinks packaging companies** using this report's analysis of their financial performance and future prospects.
- **Identify and target future growth areas** from this report's analysis of the acquisitions and divestments made by leading packaging companies and their strategies for growth.
- **Understand the key trends in food and drinks packaging** and the impact that they are expected to have on the market using this report.
- **Enhance your product development strategies** with this report's analysis of the leading packaging companies' innovation and NPD strategies.

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Sample Information: ‘The Top 10 Food and Drinks Packaging Companies’

Chapter 6: Crown Holdings

The future of Crown

The company's strong ability to develop new products has enabled it to launch several innovative products over the years. The SuperEnd drinks end, for instance, results in 10% reduction in metal used per can and enables brand cans, SuperPlus and EuroCapper. Strong product development capability allows the company to renew its product range at regular intervals in line with changing consumer preferences and thus provide an edge over competitors.

Figure 6.21: Crown Holdings SWOT analysis

Strengths	Weaknesses
Strong customer business Diversified operations Product development capability	High debt burden
Opportunities	**Threats**
New production plants Positive outlook for specialty beverage cans Expanding Indian non alcoholic beverages market	Intense competition Rising raw material prices Asbestos liabilities

Source: The Top 10 Food and Drinks Packaging Companies

Strengths

Strong customer base

Crown has a very strong customer base. The company's customers consist of many of the leading manufacturers and marketers of packaged products in the world. The company supplies drinks cans to a large number of companies, including Anheuser-Busch, Cadbury Schweppes, Coca-Cola, Heineken, InBev, Kroger, PepsiCo and Scottish Courage. In the food cans and closures segment, the company sells to diverse food manufacturers including Bonduelle, Campbell Soup, ConAgra, Continentale, H.J. Heinz, Mars, Menu Foods, Nestlé and Premier Foods. The company's major customers for aerosol cans and ends include CCL Industries, Gillette, SC Johnson and Unilever. Crown's specialty packaging customers include Altria Group (Kraft Foods), Akzo Nobel, Bristol-Meyers Squibb, Cadbury Schweppes, Danone, Nestlé, Sigma, Teisseire and United Biscuits. A strong customer base helps Crown to add stability to its revenues and also enhance its brand image.

Diversified operations

Crown has a wide geographic network. In 2006 the US, the largest geographic market for the company, accounted for 27.5% of its revenues. The UK, the second largest market for the company, accounted for 11.1% of revenues while France contributed 9.0% to its revenues. Crown's geographically diversified operations enable it to overcome weakness in any one region. Diversified revenues reduce business risks and make revenue generation less volatile.

Product development capability

The company's strong ability to develop new products has enabled it to launch several innovative products over the years. The SuperEnd drinks end, for instance, results in 10% reduction in metal used per can and enables brand differentiation. The company has also introduced a new generation of vacuum closures, Ideal closures and new full pull-off ends (EOLE III and Peel Seam). These products have been well accepted in the market and are beginning to generate licensing revenues. The company has licensed its SuperEnd and can shaping technology to Amcor in Australia and New Zealand; and Nampak in South Africa. Recently the company launched many new products including the bowl-shaped cans, SuperPlus and EuroCapper. Strong product development capability allows the company to renew its product range at regular intervals in line with changing consumer preferences and thus provide an edge over competitors.

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