



The Packaging
Federation

The Packaging
Manufacturing Industry
Annual Report 2

“ Unloved,
Misunderstood –
But Necessary”

*Turnover growth
1999 – 2000 approx 1% to
£9.13bn with the largest
growth in net supply
being paper/board
= over 5%.*



*Volume Growth 1999 –
2000 approx 2% to
9.3Mtes., being mainly
attributable to growth in
plastics consumption.*



*Increase in net supply
mainly from imports
showing over 5% growth
1999 – 2000 valued at
nearly £1.5bn. with the
largest increase in
imports in the plastics
sector (~ 3%). Imported
packaging materials
now account for 15.6% of
the UK market v. 12.8% in
1997. Undoubtedly, this is
a direct result of the
unfavourable exchange
rate against other
European currencies.*



*Paper/board and plastics
have been increasing
market share in value
terms, whilst metals have
declined year-on-year
and now estimated to
have fallen below £1.1bn
for the first time.*



Ian Dent, Chief Executive,
The Packaging Federation



Foreword

Welcome to the second edition of the Packaging Federation's "State of the Nation" Report, which aims to inform in a brief and concise manner, issues and facts relating to the UK packaging manufacturing industry.

Since the last report, The PF has continued to strive for greater recognition of the sector as a major force in the UK manufacturing scene, whilst continuing to respond to issues affecting its products.

As with all of the manufacturing sectors in the UK, the impact of short-term exchange rate differentials as well as more long-term impacts from regulations are taking their toll on investments and competitiveness.

The dramatic decline in the ICT sector had a serious knock-on effect on the packaging sector. And the foot and mouth crisis led to more imported packed food.

However, the continued buoyancy in the retail sectors has helped balance those effects in some of the material streams.

Whilst the overall value of the packaging materials grew by just over 2% between 1999 and 2000, the lion's share of this growth came from imported materials,

where the growth was over 5% in the same period. Thus reflecting the growth in the UK's GDP, but adverse trade balance in the same period.

Due to the continued consolidation and rationalisation in the industry, the FTSE classification of packaging as a separate trading stock declined to the extent that it was merged with the Support Services sector at the end of 2001. Hopefully, this more highly rated sector will allow packaging manufacturing company shares to shine and reflect the performance they warrant.

As with last year's first report, this report was prepared in collaboration with Landell Mills Marketpower*, a leading international management and marketing consultancy, specialising in packaging and packaging end-use markets.

Although the circulation of this report will be increased to include local authorities, it is still restricted in hard copy format to opinion formers, specifically those in Government – both politicians and civil servants, with a copy being made freely available in pdf format from the Packaging Federation web-site –

www.packagingfedn.co.uk



*Footnote

The company was formed in August 2000 following the merger of Landell Mills' international consulting operations with the marketing research services of Marketpower Limited. By working with customers throughout the packaging supply chain, we are able to provide a full range of international marketing research and consultancy services, including both highly focused end-use studies and detailed research based on individual packaging types.

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INTERVIEW WITH JOHN MONKS,
Chief Executive of M.Y. Holdings plc, (Europe) and Malbak Ltd, (RSA)

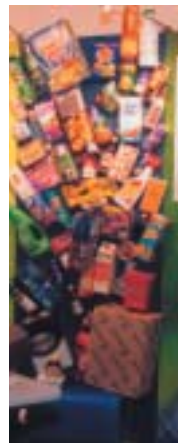
Biographical summary

John Monks' 45-year business career has been spent entirely in the packaging industry.

He has worked extensively in Europe and in Africa and in almost every primary product sector, and this has given him a broad-based experience of the industry, with a particular knowledge of the paper and board sector.

A director of the Packaging Federation since its inception 10 years ago John is a member of the PF's 'Think Tank' – the General Management Group.

Here he reflects on some of the current issues affecting the packaging industry in his usual forthright and highly individual manner.



Unloved, misunderstood, but necessary!

The headline encapsulates the UK packaging industry's difficulties. However, the issues for the industry cannot be sub-divided between the UK and Europe. The "packaging world" comprises three main regions – America, Europe and the Far East. Whilst there are some differences between these regions, UK and Europe are really one market, with common problems. In recognition of this The Packaging Federation is increasingly involved with European issues as well as local UK ones, but primarily remains a voice for UK-based converters.

Consolidation

The first and biggest issue is the fact that the industry's customers (the product manufacturers) and its suppliers, continue to become larger and thus more dominant. This immediately creates problems for packaging manufacturers who are caught between two powerful forces.

Whilst becoming larger, our customers are also migrating some manufacturing to Eastern Europe and the Far East and this will have an impact on the UK and European converting industry. In practice few packaging components can withstand the cost of being transported vast distances, so packaging suppliers need to be relatively close to the point of use.

Response of the packaging industry

Packaging Converters are trying to match this consolidation trend and are doing so primarily by merging, thus rationalising the industry. We have seen a very significant acceleration of this in recent years. Some packaging sectors are now quite strongly dominated by a few large players – the obvious ones that come to mind are glass and metal – but, outside these, other sectors are in different stages of progress. Plastics is probably still too fragmented but, like flexibles, there has been some rationalisation. Folding cartons and labels are also far too fragmented and are sinking towards the bottom of the pile in terms of profitability, partly

because of their weak position. In corrugated we have certainly seen benefits from vertical integration and consolidation and now folding cartons is beginning to replicate the American model of vertical integration with paperboard mills.

Less diversification, more focus

There is another effect arising from the consolidation process; less diversification and concentration on a narrower product range. In the UK Rexam is a good example; they used to be involved in security printing, building products, film extrusion, books, corrugated, cartons et al. Now they have shed some of those activities and pulled it in to a tighter focus and made a more successful business. Indeed my own parent business – Malbak in South Africa – was a true conglomerate in packaging terms, making products as diverse as cement sacks, toothpaste tubes, beverage cans, diapers, etc; you name it, we did it.

Now we've shed sacks, cans, tissue, corrugated, plastic bottles and containers and brought it down to just cartons and flexibles. This is a consequence of seeking economies of scale; you can't be bigger in everything, so you have to focus. I think a problem for our industry is it tends to measure success by size but of course 'big' doesn't necessarily mean 'fit', it might mean 'fat'. There aren't many 'fat' businesses in terms of profitability but there may be businesses that are unfit, that are over-fat, because their focus is the wrong way.

Global reach

The need for the major players to have a broader "global reach" – it's a wonderful term but I prefer 'geographical spread' – is I think sometimes overstated. Demand is still regionally based rather than 'global' but it's driven primarily by the brand owners, who want consistency of presentation in their markets across the world. The reality is very few international packaging businesses operate on a worldwide scale – unlike the industry's suppliers.

One of the features of this need for greater regional coverage is that in addition to mergers there are more alliances and joint ventures emerging. In my own busi-





ness we created a pharmaceutical alliance because although we had a strong position in the UK and Italy, we didn't have any manufacturing presence in Germany or France or Spain. So we found partners in those countries and formed PharmaPact (which acts as a marketing body to present the combined benefits of all the members to the multi-national pharmaceutical companies. Others have followed this lead, for example in the personal care market an alliance between US, European and Australian converters has been created.

Prices

Another big issue is low pricing. I call it "more for less" because there is no doubt that "cost out" seems to be the watch word of everybody who uses packaging, but there is a parallel – and unrealistic – requirement for more benefits too. Driven initially by the major users, the brand owners and major retailers, it has dropped down to even the smaller users. There is immense pressure on selling prices and this is exploited when there is weakness amongst converters.

Unfortunately in some sectors the weakness is exacerbated by over-capacity which fuels lower prices. The excellent initiative by Jefferson Smurfit of capacity constraint and maximised assets has served them well. The industry should note Smurfit's vision of gearing to meet today's volume, not tomorrow's promises.

There is often an imbalance between true cost and selling price. Customers are looking to their suppliers to take on many supply chain issues. All too often the industry is not achieving selling prices commensurate with the additional services that are being requested by the customer base. And those "services" often cost quite a lot of money. They may range from concept and design work, extended credit or stock holding, to having employees who are totally dedicated to a single customer. This may be an executive spending two or three days a week on the user's site, or supply engineers and line operatives to help the packing line process, and back room people to support all that. So the whole logistics issue is becoming more expensive but is not being reflected in the selling prices. And that is damaging to the industry in the long term.

Prices should be fair and reflect competitive and sustainable levels. Users, however, want everything at

lowest price yet with "a la carte" menu frills. Buyers too often use small, weak, unsophisticated suppliers' price levels as a benchmark for all, irrespective of capability, credibility or standards. They also expect latest technology but deny the industry pricing opportunities to recover the investment cost.

However, the cost out process may have gone too far. A recent study by the Grocery Manufacturers Association in America highlighted the growing problem of damage to customers' products due to downgraded packaging – now amounting to \$2.5bn per year. I am pleased to note Pira (a UK packaging research unit) is starting a project to evaluate the situation in the UK. This will re-emphasise to buyers that it is not packaging price but total cost upon which they should focus.

Innovation, research & development

At the same time the Industry has constant calls for innovation; "do it differently, do it better". And "better" all too often means "cheaper" for the user as well. I think our industry has an excellent record in terms of technical development, structural design and new solutions. We are a creative industry and come up with some very innovative presentations. Development of new packs or materials has extended shelf life, or improved portion sizes, to the consumers' benefit. The ability to easily digitally transfer an image from (say) a designer in Baker Street to (say) a printer in Scunthorpe is a direct result of innovation.

Image

Unfortunately, as I mentioned at the beginning, there is a wrong perception about the packaging industry. The regard for the packaging sector is very poor amongst users, the public and investors. Over-packaging, litter and environmental concerns seem to dominate their general view, without regard to the conveniences good packaging brings to modern living. The packaging industry doesn't over-specify packaging, consumers cause litter and stock markets under value us and discourage investment.

We have to change our image and raise the profile of the industry. It is quite difficult to get people interested in coming into the industry because first of all it's





“manufacturing”. We have a generation of people leaving the education system who think that manufacturing is a dead end and packaging a dirty word.

There is also a lack of awareness of the benefits that packaging brings. In the less developed areas of the world there is much more food waste because of the lack of packaging, the inability to get produce to the market in time, or protected or preserved by adequate packaging.

Tetra Pak made an interesting video some years ago, which showed a supermarket with a housewife walking past shelves full of packed product. Suddenly the packaging “disappears” and the rice all falls on the floor, the jam drips down, the milk cascades everywhere. It was a very short clip but it made the point that modern retailing simply wouldn’t exist without packaging.

Nevertheless, all too often the user sees packaging as just a means of delivering his product to the point of consumption, rather than an enhancing added value component of his product. Packaging is increasingly being wrongly regarded as a commodity rather than a bespoke product adding value.



Legislation and the environment

Legislation is also a burden on the industry and it will continue to be so. It isn’t going to go away; it’s going to get worse. It is fuelled by the man in the street’s wrong perception, and governments’ desire to accord Brussels every facility to impose more and more cost burden and red tape upon industry generally.

This industry’s load under the UK Packaging Regulations is disproportionate to “who is the polluter and who gets the benefit”. Why the proposal to impose a simple recycling levy at the retailer pay point (it would have been a penny in every £10) wasn’t implemented I don’t know. It’s the simplest method and I don’t believe the public could really have objected to that small amount. It would have impressed upon them that they were paying to help the environment and it would have improved their awareness that they are part of the problem – and part of the solution. Instead we have regulations that are as Byzantine as the rules of cricket!

The publication of the Competition Commission’s Code of Practice for supermarkets and suppliers also fell for short of the

Packaging Industry’s hopes that it would redress the imbalance of power. The DTI consultation focused more on retailers’ views than industry associations’ arguments and consequently the Code allows grossly unfair practices to continue.

E-auctions (B2B)

Another topical issue at the moment is the e-commerce impact. E-commerce itself is not a problem for the industry but reverse e-auctions are, because they undermine relationships and put at risk quality, integrity and security. They create “winners at losers’ prices”. Such auctions need better regulation, greater transparency and more ethical management.

Outlook

Apart from a few notable exceptions, the industry is not in good financial health. It is however still alive and, unlike the UK motorcycle industry, it isn’t going to die despite the apparent determination of many buyers to help it to do so. Whether we are loved or not, we are needed and a necessary part of the supply chain.

Packaging is a creative industry, and can offer exciting career opportunities for young people who are keen to learn and contribute. The industry believes in encouragement, training and support. It is adaptable and versatile and has met and successfully resolved many challenges. For that reason I remain confident about the long-term future of the industry and I am proud to be part of it.

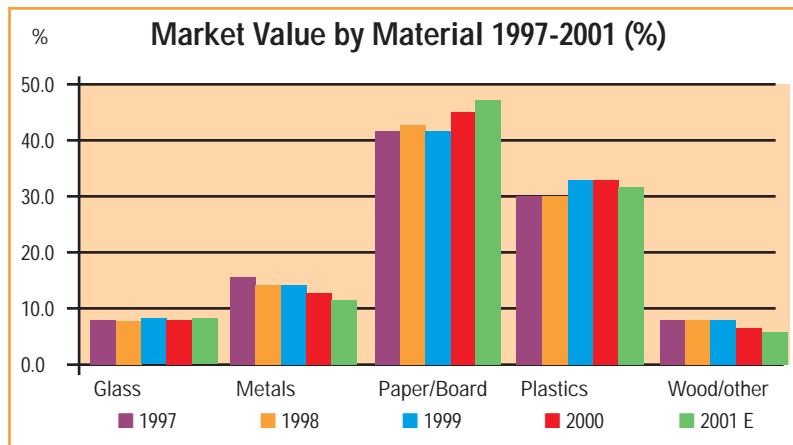
As the industry rationalises, the balance of power will swing back to a more equitable basis and users will, I believe, recognise the need to value our products more and treat us as true partners capable of providing value. Without a vibrant and dynamic packaging industry, manufacturers and retailers would struggle to differentiate and deliver their products, and consumers would suffer.

These comments are John’s own and do not necessarily reflect the views of the Federation or its membership.



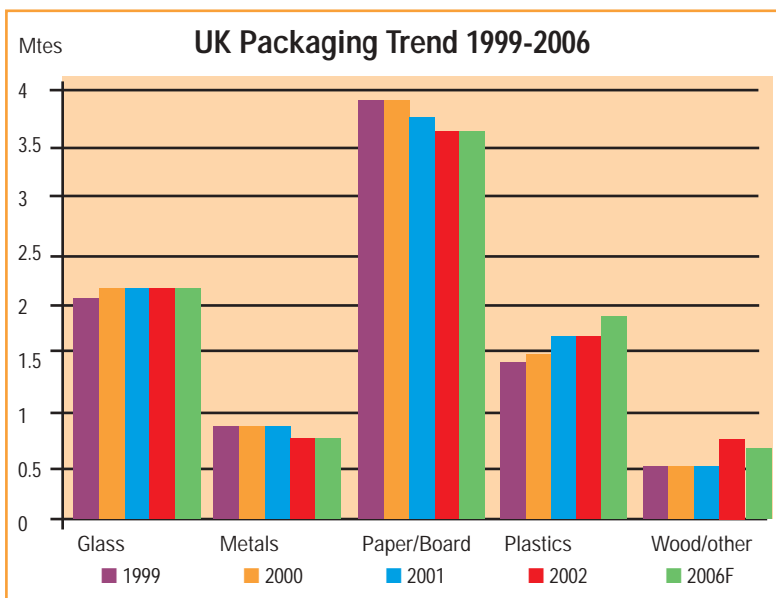
Packaging Manufacture

Fig 1



Source: LLM based on Prodcorn Data

Fig 2



Source: DEFRA – Report of the Task Force of the ACP

Top EU Packaging Companies in 2000		
	Home base	SalesUS\$bn
Tetra Pak	Sweden	6.7
Jefferson Smurfit	Ireland	3.7
Saint Gobain	France	3.5
Rexam	UK	3.0
Huhtamaki	Finland	3.0

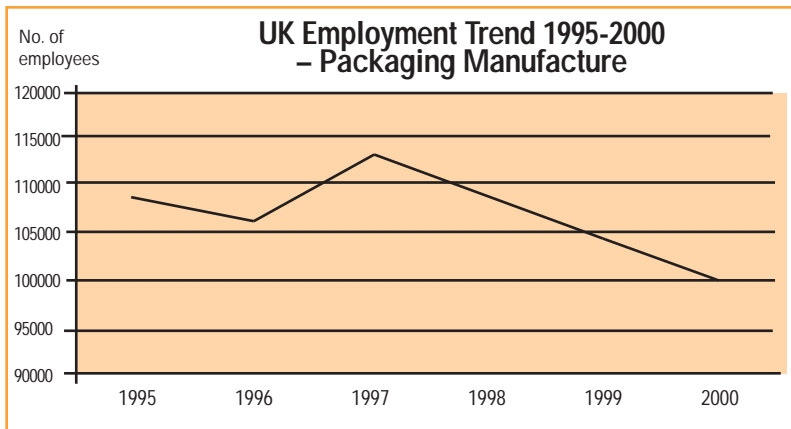
Source: World Packaging Cos. 3rd Edn.

Financial

- Packaging is one of world's largest manufacturing sectors with sales around \$400bn. p.a.
- Rexam plc only UK-based packaging company in global top 10.
- UK turnover growth 1999 – 2000 approx. 1% to £9.13bn. with the largest growth in net supply being paper/board = over 5%.
- Paper/board and plastics have been increasing market share in value terms, whilst metals have declined year-on-year and now estimated to have fallen below £1.1bn for the first time.
- UK volume growth 1999 – 2000 approx. 2% to 9.3Mtes., being mainly attributable to growth in plastics consumption.
- Increase in net supply mainly from imports showing over 5% growth 1999 – 2000 valued at nearly £1.5bn. with the largest increase in imports in the plastics sector (~ 3%). Imported packaging materials now account for 15.6% of the UK market v. 12.8% in 1997. Undoubtedly, this is a direct impact from an unfavourable exchange rate against other European currencies.
- Exports declined by 4% although remaining near £1bn. mark. The picture was variable by sector with the biggest loser being glass, but metals showing an increase. The impact of customers switching production between EU countries, especially in the food and drink sectors, is the cause of such swings – once again due to economic and sometimes regulatory pressures.
- Growth and operating margins for packaging manufacturing in UK more adversely affected than comparable operations in mainland Europe.
- Plastics packaging manufacturers pre-tax profit margins down to 4.4% from 5.6% in '97/'98. Source: *Plastics Packaging Manufacturers*, pub. by Prospect Shop.
- In comparison, margins in supply chain for branded goods up to 10+% in 2000 (cf. '84 6+%) and non-branded goods ~6% (cf. '84 ~5%) Source: *Investec Henderson Crosthwaite*
- Major retailers private label sales now grown to: Sainsbury's 45.7%, Asda 45.7%, Tesco 43.0%, Safeway 40.0%, Overall 36.4%. Source: *Datamonitor*

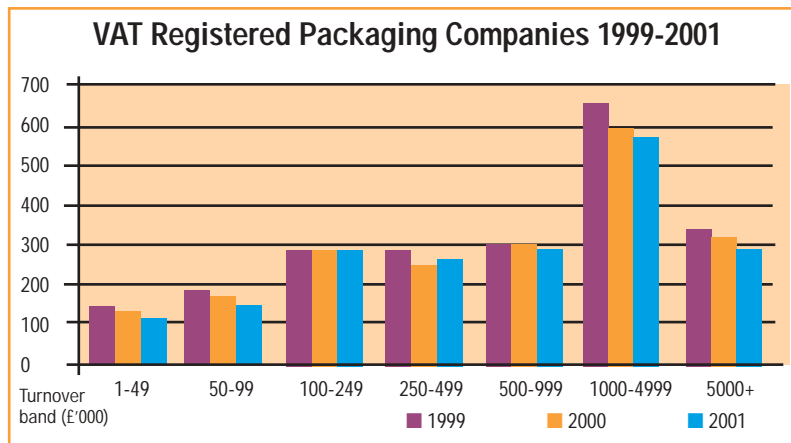
Packaging Manufacture

Fig 3



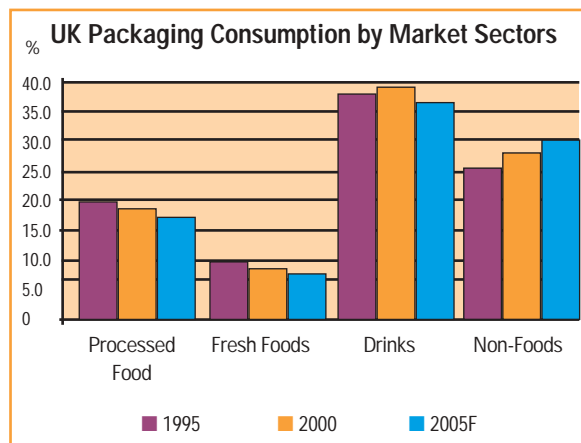
Source: LLM from Nomis data

Fig 4



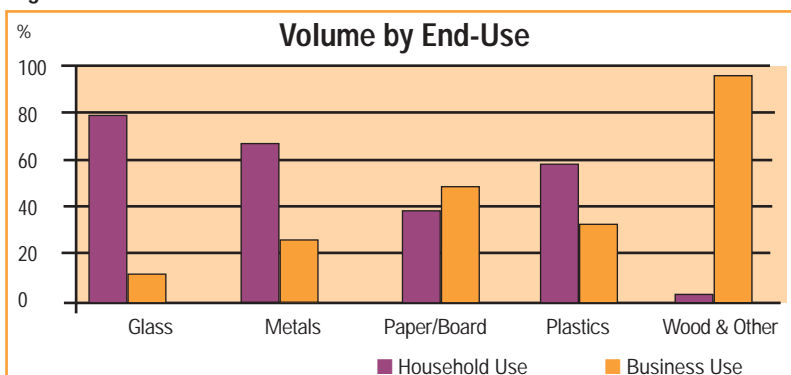
Source: ONS

Fig 5



Source: Marketpower Packaging Database

Fig 6



Source: DEFRA - Report of the Task Force of the ACP

Employment

- Number of VAT registered packaging companies in UK fell 9% between 1999 and 2001.
- UK Manufacturing employment fell from 4.2m in '98 to 3.75m by the end of 2001.
- Packaging employment trend following UK manufacturing trend. Employment level now revised to approx. 100K, due to NOMIS, new section of ONS dealing with employment, revising numbers and classification. Previous numbers to 125K, now seen to have included contract packing.
- UK manufacturing overall provides 14% of total employment.

Productivity & Competitiveness

- British Chambers of Commerce claims "Red Tape" now costing industry £15bn.p.a. with the Working Time Directive accounting for approx. 50% of that regulatory burden.
- Chancellor Speech - Mar. '02 at TGWU conference on "Manufacturing Matters" claimed "... on average productivity growth in manufacturing outstripped productivity growth in rest of economy"
- Packaging productivity manufacturing estimated to be approx. £87K, based on UK manufactured sales per employee.
- According to the World Economic Forum, Britain slipping in investment global league to 12th place behind Finland (1st), Norway (6th), Sweden (9th) and the Netherlands (8th).

Supply Chain

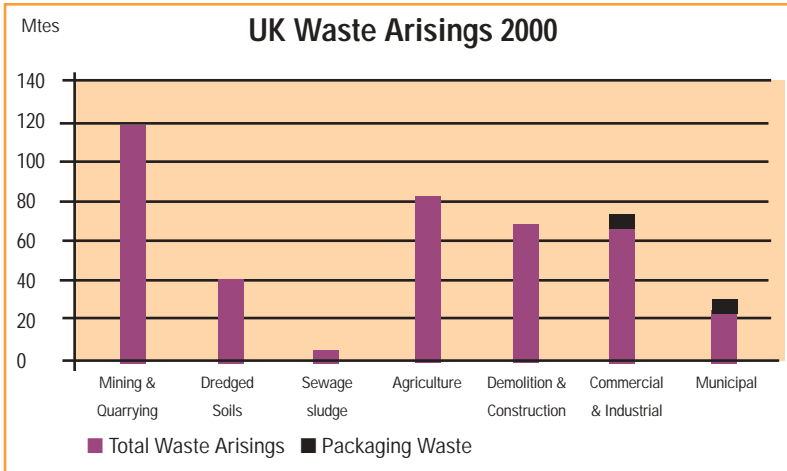
- Based on filling statistics, 71.1% all packaging materials consumed in UK used for processed foods, fresh foods and drinks in 2000.
- Drinks largest end-use market accounting for 40% volume fillings on 2000.
- Strongest growth expected in non-foods sector over period to 2005.
- Cap Gemini Ernst & Young in "State of the Art in Food" predicts that co-operation between food manufacturers & retailers inevitable with major retailers in next 5 years set to dominate food industry being Wal-Mart, Tesco, Carrefour, Safeway US, Delhaize & Royal Ahold.
- Retailers market shares in UK grocery trade in 2000 were Tesco 16.5%, Asda 10.6%, Sainsbury's 12.2%, Safeway 7.3%.
- Code of Practice between Major Grocery Supermarkets, i.e. Tesco, Sainsbury's, Asda and Safeway, and Suppliers came into force 17th March 2002.
- Packaging Federation assisted DTI and PWC with Government sponsored study into the impact of e-commerce on the supply chain. Results expected to be disseminated during Q2 2002.



Packaging Manufacture

Environment

Fig 7



Source: DEFRA *The Environment in Your pocket 2001*

Waste Management

● UK Packaging Waste approx. 2% of total UK Waste stream of 424Mtes.

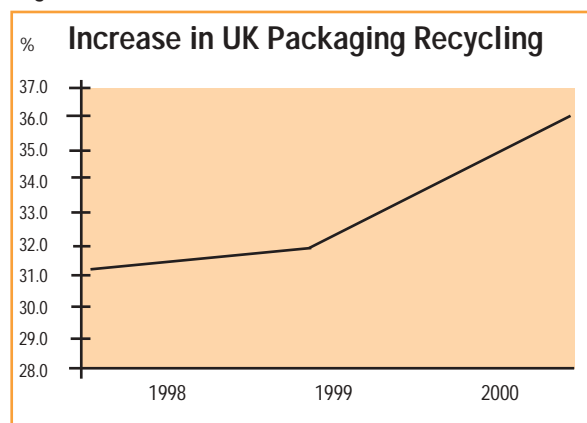
Source: DEFRA *The Environment in Your Pocket 2001*.

● The PF awaits with interest the PIU (Cabinet Office Performance & Innovation Unit) Waste Study with Phase I (to Feb 2002) examining options for meeting the EU Landfill Directive (compostible fraction of solid MSW only) and Phase II (to summer 2002) extending study to all controlled wastes and development of a sustainable waste management strategy.

● UK Packaging Recycling levels increased by 5% between 1998 and 2000.

● Glass container recycling levels rose by approx. 23% between '99 and 2000= 32.5% total volume consumption

Fig 8



Source: DEFRA – Report of the Task Force of the ACP

● Steel packaging recycling increased by 6.1% during 2000, whilst Aluminium increased by 5.8% (excluding new protocol on calculation of Aluminium recycling).

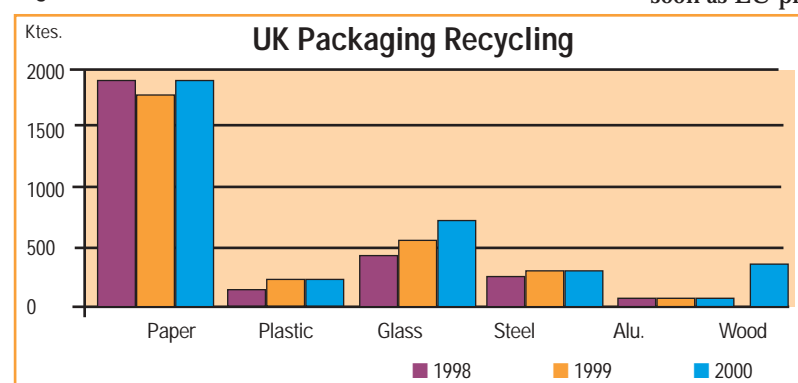
● Use of recovered paper in Corrugated during 2000 reached 2Mtes. = ~40% total v. 1.2Mtes. newsprint.

● The PF notes with dismay the continuing decline in reported (obligated) packaging as a percentage of the total waste as this places larger and larger burdens on the “good guys”.

● EU Commission has finally published its proposals for the revision of EU Packaging & Packaging Waste Directive. The PF seeks minimum intervention at this stage due to current discussions in Brussels on a re-think of waste strategy under the 6th Environmental Action Programme and ratification of the EU Enlargement process.

● The PF welcomes the DTI Regulatory Impact Assessment (RIA) on the EU Proposals and calls for such RIAs always to be conducted as soon as EU proposals are published.

Fig 9



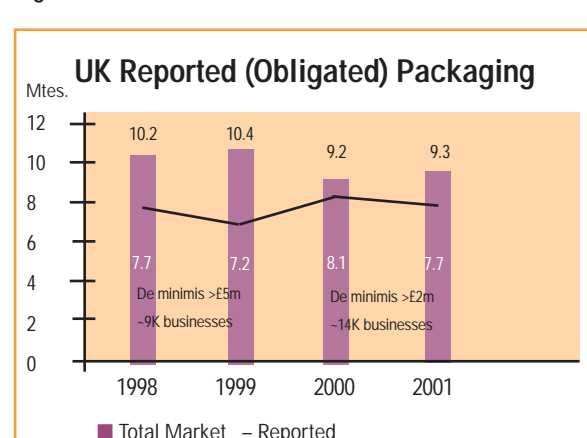
Source: DEFRA – Report of the Task Force of the ACP

● Packaging Federation applauds end to 20 year old “Danish can ban” for beer and soft drinks, and will continue to fight for recognition of single market principles whatever the product/pack combination.

Energy Management

● 2001 saw the introduction of the UK Climate Change Levy (CCL). Packaging manufacturing industry unevenly impacted as some materials able to take benefit of the “Negotiated Agreements” (CCLAs). The PF supports a fairer distribution of benefit and burden to all parts of UK society, especially transport and domestic use as in most of other EU countries.

Fig 10



● PF members are taking full account of need for energy management by considering CHP & mines gas. However, increased gas prices and NETA arrangements now make small-scale CHP installations uneconomic and mines gas requires official derogation from the CCL to be economic.

● The PF therefore welcomed the PIU Energy Review – Making More with Less – which calls for recognition of need for international competitiveness in any carbon reduction measures; energy policy to encourage investment in renewable energy sources with 20% target on electricity producers by 2020 and urgent removal of institutional barriers to CHP investment, plus promotion of energy efficiency; and economic instruments applied to all energy users with a 20% improvement target in the domestic sector by 2010 and a further 20% the following decade.

● The PF is keeping a watching brief on Emissions Trading.

Packaging Manufacture

Table 1

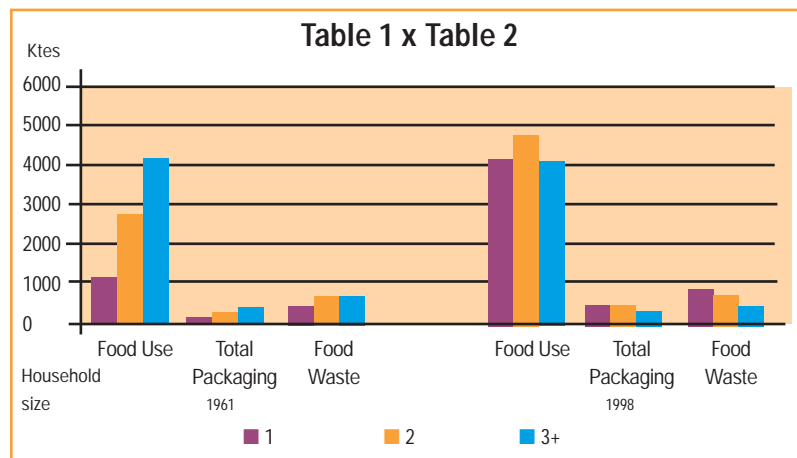
Food Consumption per Consumer Group kg/yr			
Household size	1	2	3+
Food Use	590	560	470
Total Packaging	70	60	45
Food Waste	120	90	50

Table 2

M. households	Household size		
	1	2	3+
1961	2.3	4.9	9.1
1971	3.3	5.8	9.1
1981	4.3	6.2	9.0
1991	5.9	7.4	8.5
1998	7.2	8.6	8.9

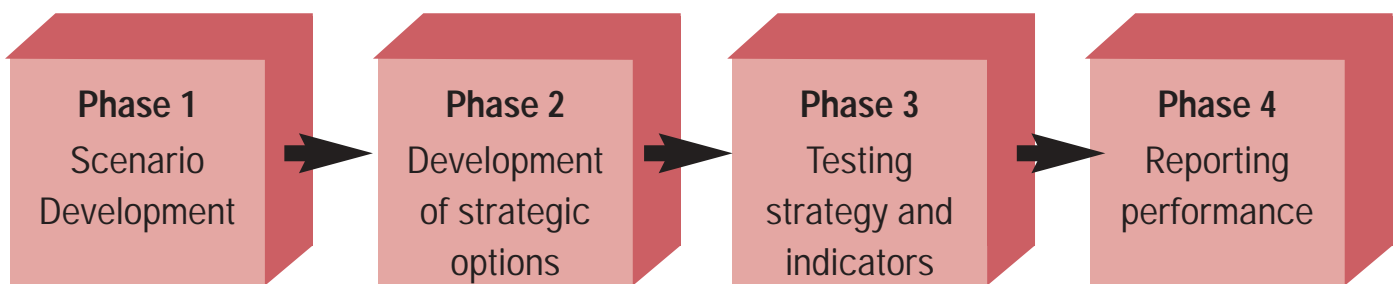
Source: INCPEN

Fig 11



Sustainable development

The PF is a member of the Pioneers Group, a DTI/DEFRA/Cabinet Office initiative – a group of approx. 20 sectors to develop and exchange ideas on sustainable development. Process as follows:



Social

Sustainable Consumption

- ONS data on UK Living shows a Family with children in '75 composed 71% of households, whilst in 2000 this had declined to 36%. Single parent families were 10% in '75, increasing to 26% by 2000. These trends have direct impact on products and type of packaging, i.e. more use of microwaves and ready-made meals.
- ONS predicts UK population to grow by 5+M. by 2025, mainly from immigrants and increase in life expectancy – over 13M. of 65M. (20%) by 2025 will be of pensionable age and just over 11M.(17%) under 16 v. 2000 where under 11M. pensionable age (18%) and under 16's 12M.(20%). Design of packaging and packed goods will have to cater for this reverse trend.
- PF leading industry group examining DTI sponsored work on ergonomics, i.e. handling characteristics of packaging for potential future guidelines.
- During 2001, Channel 4 TV showed "1940's House" with following comments relating to packaging and packed goods in this war period: Lack of choice and variety were noticeable; 350 varieties of biscuit became 20.

Shopping often became difficult for women who were working full-time and when they could get to the shops they had to be aware of 'bomb damaged' goods – green butter, addled eggs, or glass shards in the packaging.

Bottles were also short, and there was a campaign to encourage people to return milk bottles.

Food wrapping in general became scarce and shoppers had to remember to take their own with them to the shops. Decorative packaging was replaced with plain wrappings of thin paper and board.

Patriotic housewives were instructed to separate rubbish into four types: metal, scraps, bone and paper. The world has changed remarkably since this period, except for the last item!

Our mission statement: *The Federation actively promotes the packaging manufacturing industry, its economic importance, the products it produces, the benefits to the community deriving from packaging, and the industry's responsible concern for the environment and the community as a whole.*



The major initiatives involving The Packaging Federation in the past year have been:

- The ACP (Advisory Council on Packaging) Task Force. The PF chaired one of the three working groups in this new TF developing, for the first time, a common methodology for all packaging materials, which was the basis for estimating the packaging material flows to the waste stream from 2002 to 2006. The full report of the Task Force was published in December 2001, and can be found on the DEFRA web-site (www.defra.gov.uk/environment/waste/acptask/pdf). The PF continues to support the work of the ACP Task Force as an information resource for the ACP.



- In its usual manner, The Federation continued to develop a constructive dialogue with the DTI, holding workshops and assisting with the launch and development of the e-commerce impact study on the packaging chain, conducted by PWC; the ergonomics of packaging with the DTI consultant, Robert Feeney Associates; and the Recycling Policy Section. The Federation was also invited to be a member of the Pioneers Group, a joint DTI/DEFRA and Cabinet Office initiative looking at sustainable development for approximately 20 different and varied sectors, ably supported by the consultants Optimat. All of these initiatives are to be continued in the coming year with all to embrace the wider packaging chain and as many stakeholders as possible.



- Pioneering a new approach, The PF established a rapport with The Treasury, in particular The Financial Secretary, Rt. Hon. Paul Boateng MP, who paid the PF the honour of visiting two of its key members in the North of England, viz. Linpac and Rexam early in 2001. Continuing dialogue is to be maintained in an endeavour



to find more equitable measures to address energy efficiency as part of the UK's commitment to the Kyoto principles rather than the current Climate Change Levy (CCL). The Federation will also continue to work with the CBI and the EEF in this connection.

- As well as the CCL, from a legislative position, the packaging manufacturing sector in common with the rest of manufacturing has had to cope with an increasing financial burden from the Working Time Directive to Pensions to IPPC.

- The Code of Practice between Major Supermarkets and their suppliers was finally agreed at the end of 2001. As with other Trade Associations, the Federation will monitor the performance of the Code to ensure that the spirit of the agreement as well as the practice is adhered to.

- In an effort to create an early dialogue with opinion formers in Brussels on the revision to the EU Packaging and Packaging Waste Directive, The Federation promoted and arranged with the Associate Parliamentary Sustainable Waste Group and Pro-Carton a seminar in the House of Commons with leading figures such as the UK Environment Minister, Rt. Hon. Michael Meacher MP, Dr. Caroline Jackson, MEP and Dr. Otto Linher, DG Environment providing key speeches. This was followed by another first for The Federation – a dinner for members of the European Community establishment in Brussels. Subsequent recognition was given to the PF with invitations to join the rapporteur in industry round-table events.

The Packaging Federation will continue to represent the views and interests of the packaging manufacturing sector, which with a turnover in excess of £9bn. making it one the largest UK manufacturing sectors; and many companies of global and European standing, deserves to be recognised.

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