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1 EXECUTIVE SUMMARY AND CONCLUSIONS

The Central & South American market for stand-up pouches (SUPs) used in all retortable and non-retortable applications is estimated at 7.1 billion units in 2013. The Central & South American region accounts for approximately 9% of the global market for stand-up pouches estimated at approaching 80 billion units.

…………………………..
………………….

2 INTRODUCTION

2.1 PCI Films Consulting Ltd

PCI Films Consulting Ltd is a member of the PCI Consulting Group, leading consultants to the petrochemicals industry. Its origins extend back to 1994, when it started to provide business consulting, market research and marketing services to companies involved in the manufacture and sale of PET films and also to their major customers. Today, PCI Films Consulting Ltd has developed into a multifunctional team of professionals able to supply market and business related consulting services to anyone involved or interested in the production and use of speciality and oriented plastic films, fine papers and aluminium foils.

PCI Films Consulting Ltd's comprehensive range of services to clients on a subscription and single payment basis includes:

- Quarterly Business Reports on the PET film, PP film, European and Worldwide Flexible Packaging Markets.
- Regional Supply/Demand Reports on the BOPET and BOPP film markets and on the World and European Flexible Packaging Markets.
- Confidential ad hoc studies for individual clients with specific market research and business needs.
- Independent reviews of business investment plans for lending institutions.

Our consultants, associates and junior researchers are located throughout the world and have a high degree of experience in studying our chosen markets.

To find out more about PCI, log on to our website at

www.pcifilms.com

2.2 Background

Stand-up pouches have contributed towards growth of the flexible packaging market in Central and South America, which at over 5% per annum during the last five years has been higher than the more established markets of Western Europe and USA. Brazil is the largest market in the region; and has only recently seen more significant growth in stand-up pouch consumption, whilst in countries such as Chile and Colombia, stand-up pouch sales are well established accounting for over 10% of overall flexible packaging sales in each of these countries and continue to grow. In view of these trends and following publication of studies on Europe and the USA, PCI has decided to publish a report on the Central and South American stand-up pouch market.

2.3 Research Scope and Methodology

2.3.1 *Pouch Definition*

In this review of the Central & South American stand-up pouch market we have considered many types of flexible pouch but restricted our definition and market statistics to the following:

- Doypack and Cheerpack formats that have a specially designed pleat that is sealed at the bottom so that it can stand upright.
- Brick pouch, developed by the Spanish packaging machinery company Volpak. The Volpak machine forms the pouch while incorporating the cap and filling it. The pouch forming process and product packaging are thus completed on a single machine.
- Retorted lay-flat pouches which are used for packing products such as retort MREs (Meals Ready-To-Eat) for the military, and tuna.
- Bottom gusseted horizontal form-fill-seal bags, which are widely used for confectionery and snack biscuit products.
- Horizontal form-fill-seal laminates of Paper/PE/Alufoil/PE made into bags with a bottom gusset.
- The consumption of stand-up pouches in this report in unit volume terms is measured at the packer level and takes account of both pre-made pouches that are subsequently filled, as well as the unit equivalent of printed laminate converted for form-fill-seal.

We do not include the large volume of paper sacks that are used, for example in pet foods, which do in fact stand up by themselves but are manufactured in a different manner. Also excluded are block-bottom bags, whether made from paper or plastic.

2.3.2 *Flexible Packaging Definition*

To many people, 'Flexible Packaging' is a broad generic term that covers a wide range of products and applications. The definition by which PCI measures 'Flexible Packaging' is more specific and narrowly focused.

'Flexible Packaging' embraces the manufacture, supply and conversion of plastic and cellulose films, aluminium foils and papers that are used separately or in combination, for primary retail food packaging, non-food packaging applications such as pet food, do-it-yourself products, hygiene product overwrap, household detergents and certain other specialist non-food packaging end use sectors, such as medical and pharmaceuticals and tobacco.

Our definition specifically excludes shrink and stretch films used for secondary packaging, pallet hoods and pallet wrap, carrier bags, supermarket and self-service counter bags, silage bags, refuse and industrial sacks, etc.

2.3.3 *End Use Applications*

The main end-use applications addressed in this study are:

- Tomato Sauce (not ketchup)
- Mayonnaise
- Ketchup & Other Sauces
- Ground Coffee and Powdered Drinks
- Retort Food
- Other Food & Liquid Drink Products – including a range of products such as cereals & seeds, candies, chocolate, pickled olives, nuts, frozen foods, panettone cakes (significant in Peru), and liquid beverages such as Capri Sun.
- Laundry, Dishwashing & Homecare
- Shampoo & Personal Care
- Other Non-Foods
- Dry Pet Food
- Retort Pet Food

2.3.4 *Geographic Scope*

The report covers stand-up pouches filled in Central America, the Caribbean Islands and South America. The report does not include data relating to Mexico.

2.3.5 *Research Method*

The data collected for this study is based on a series of detailed interviews undertaken with machinery suppliers, converters and packers as well as other industry contacts. This information has been supplemented with scanning of relevant packaging and end-user industry journals and PCI's own extensive database.

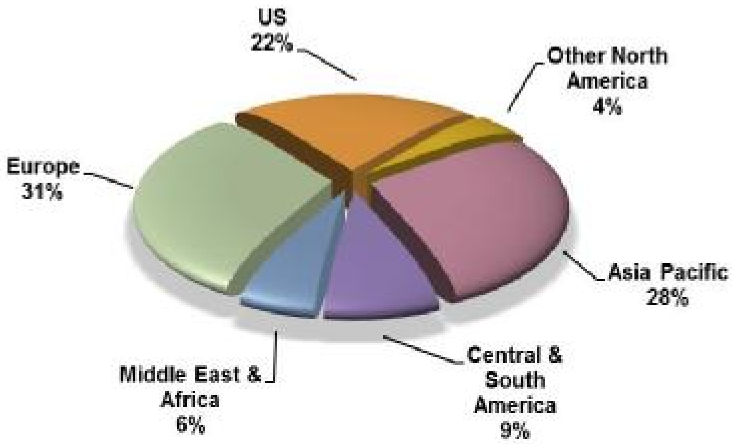
The interviews were conducted during July 2014 and our report therefore reflects our analysis and perceptions at the time. We have sought to recognize the fast changing nature of this market in our commentary, analysis and forecasts based on feedback from contacts that are experiencing the changes at first hand by increased enquiries and orders.

3 THE CENTRAL & SOUTH AMERICAN STAND-UP POUCH MARKET

3.1 Stand-Up-Pouch Market Background and Market Drivers

Within the global market for stand-up pouches estimated at around 80 billion units, Central & South American SUP sales account for around 9% of the total at 7.1 billion units.

Figure 1. World Market for Stand-Up Pouches by Region



Source: PCI Films Consulting Ltd / Industry Sources

The Central & South American region, for the purposes of this report, comprises 30 countries (excluding Mexico). The report provides a detailed review of the following 6 largest markets in terms of units of stand-up pouches manufactured, with other smaller markets combined together under the heading 'Other Central & South America'.

- Argentina
- Brazil
- Chile
- Colombia
- Ecuador
- Peru
- Other Central & South America (incl. the Caribbean Islands)

We estimate that the value of the Central & South American market to converters of pre-made stand-up pouches and printed pouch laminate supplied to packers to be around US$290 million in 2013. Based on this estimation, stand-up pouches account for around 6% by value of flexible packaging sales in the region, a broadly similar share to that in the US and Europe.

Table 1: Central & South American Stand-Up Pouch Market - % Share of Total Flexible Packaging Sales by Country (US$m)

Country	Total flexible packaging sales 2013E	Stand-up pouch sales 2013 (US$M)	SUP % share of total flexible packaging sales
Argentina			
Brazil			
Chile			
Colombia			
Ecuador			
Peru			
Other Central & South America*			
TOTAL			

**Includes Bolivia, Paraguay, Uruguay, countries of Central America and Caribbean Islands*

Source: PCI Films Consulting Ltd / Industry Sources

Stand-up pouch sales are most important in the flexible ……..

Over the last five years SUP sales in Central & South ………

Table 2: Central & South American Market for Stand-Up Pouches by Country 2008 – 2013 (million units)

Country	2008	2013	Av. % change pa 2008 to 2013
Argentina			
Brazil			
Chile			
Colombia			
Ecuador			
Peru			
Other Central & South America			
TOTAL			

Source: PCI Films Consulting Ltd / Industry Sources

Refill packs for various applications – especially non-food products ………

However Ecuador, although small is growing at an average annual growth rate of 15%, the fastest in the region.

Market in Square Metres

In area terms approximately 400 million m² of substrates are used ……….

Figure 2. Central & South American Market for Stand-Up Pouches by Category by M²

Total = 400 million square metres

Source: PCI Films Consulting Ltd / Industry estimates

Retort / Non-retort

Retort pouches, whilst currently representing a small proportion of the regional market, have begun to take off in Brazil, with some sources expecting rapid growth over the next few years, especially in human food applications.

Figure 3. Retort and Non-retort Stand-up Pouch unit sales in Central and South America 2013

Total = 7.1 billion M2

Source: PCI Films Consulting Ltd / Industry Sources

Historic Growth Drivers

A combination of factors has contributed towards the growing usage of stand-up pouches (SUPs) in Central and South America. Those particular to the Central and South American region include:

- The development of the tomato-based products industry, especially in Brazil. …….

- Packers and consumers are looking …….

- A growing interest in ethnic and ……..

- The popularity of pasta. Pasta, and therefore sauces and dressings used in conjunction with pasta, are feeling some benefit from the lack of growth in meat consumption due to high market prices and levels of consumer indebtedness, especially in the major meat-consuming markets of Argentina and Brazil.

  Pasta sales meanwhile have ……….

  Brazil is the world's third largest pasta producer, with an annual volume of more than 1 million tonnes, only behind Italy and the US. Dry pasta currently has the largest share, accounting for 80% of the whole pasta category in 2013 in Brazil.

- Brazil's growing population of lower and ….

- The expansion of modern retail.
  - In Colombia convenience stores such as Exito Express …….
  - Even if traditional channels dominate ……
  - With increasing disposable incomes, …..

- Expansion of the food processing sector across the region

Other factors, which may have contributed towards the growing usage of stand-up pouches (SUPs) in Central and South America that can be applied to most regions include:

- Stand-up pouches satisfy a longer list of consumer packaging requirements compared to other packaging types – cartons, rigid plastics, cans or glass. These needs include:

    - Ease of dispensing
    - Table top stability
    - Product freshness and resealability
    - Sustainability
    - Microwaveable
    - Eat from container
    - Ergonomics
    - Storage
    - Affordability

    - Designers have met changing …..

      The increased popularity of …..

    - Pouch manufacturers have been able to introduce different shapes which attract younger users and address the difficulties of how to safely hold and pour liquid contents.

      The on-the-go lifestyle is now supported …..

    - Stand-up pouches have enhanced ……

- Ageing rigid packaging filling equipment will likely create new opportunities for replacements with pouch packaging equipment over the coming decade.

- As with flexible packaging in general, SUPs …..

More traditional rigid packaging formats take up more space and are heavier. Even empty, rigids take up as much room as a filled package and are significantly heavier and thicker than flexible formats so they weigh significantly more. Moving from a rigid to a flexible format can have an immediate impact on packaging costs (including transport costs) and weight reduction, together with associated environmental benefits.

<u>Trade</u>

Our research suggests that SUP unit volume imported ….

Within the inter-regional import total the overwhelming majority ……

An increasing number of converters in the region now have the necessary skill and technical capabilities to produce SUP laminate, most of which is understood to be supplied to packers within individual national ……

However, trade barriers in the form of import duties continue to keep the manufacture and usage of SUPs mostly confined within national borders and this has served to boost domestic production of pouch laminate within a number of …….

Brazil: xx% (especially from Alusa of Chile for tomato sauces)
Colombia: xx%
Argentina: xx%
Ecuador: xx%
Peru: xx%
Chile: Up to xx%

For the region as a whole, intra-regional imports accounted for around 14% of SUP unit demand, some 1 billion units.

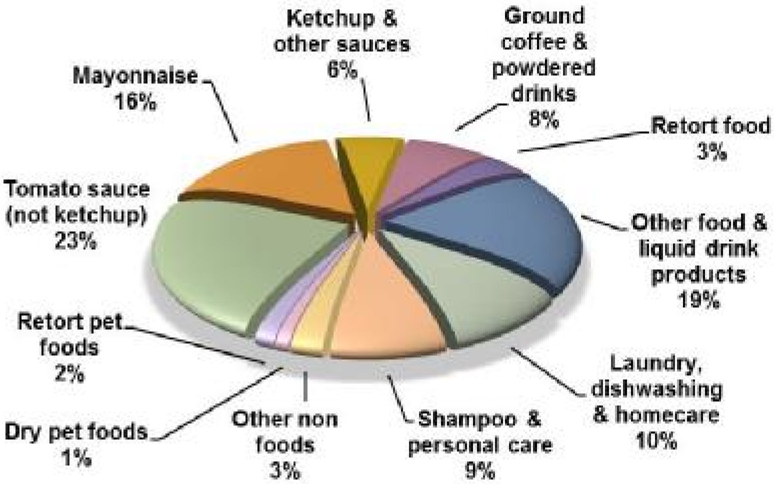
3.2 Central & South American Stand-Up Pouch Market by End Use

In this report we have segmented the Central & South American stand-up pouch market into eleven end use sub-sectors:

- Tomato Sauce (not ketchup)
- Mayonnaise
- Ketchup & Other Sauces
- Ground Coffee and Powdered Drinks
- Retort Food
- Other Food & Liquid Drink Products
- Laundry, Dishwashing & Homecare
- Shampoo & Personal Care
- Other Non-Foods
- Dry Pet Food
- Retort Pet Food

Statistics in this………

Figure 4. Central & South American Market for Stand-Up Pouches by End Use Category



Total = 7.1 Billion Units

Source: PCI Films Consulting Ltd / Industry Sources

Rapidly growing demand for stand-up pouches is a global phenomenon which is reflected in the increase in the number of new products launched in the SUP format. According to Mintel's Global New Product Database, 9,139 new products were launched in 'stand-up' pouches in xx countries in 2012 compared with 1,140 products in 2003.

In six of the countries in the region there were, according to Mintel's Global New Products Database, 1,171 new products launched in stand-up pouches between January 2013 and July 2014, including xx in Brazil, xx in Chile, xx in Argentina, xx in Colombia, xx in Peru, and xx in Venzuela.

The largest end-use category is **Tomato Sauce (not ketchup)** …….

All major markets in Central & South America manufacture stand-up pouches for **Mayonnaise**, …

Table 3: Central & South American Market for Stand-Up Pouches by Category 2008 – 2013 (million units)

End Use Category	2008	2013	Av. % change pa 2008 to 2013
Tomato sauce (not ketchup)			
Mayonnaise			
Ketchup & other sauces			
Ground coffee & powdered drinks			
Retort food			
Other food & liquid drink products			
Laundry, dishwashing & homecare			
Shampoo & personal care			
Other non-foods			
Dry pet foods			
Retort pet foods			
TOTAL			

Source: PCI Films Consulting Ltd / Industry Sources

Retortable SUPs used for **pet foods** and **human foods** accounted for just over xxx million units in 2013, just xx% of the Central & South American market total. Two thirds of the total retort pouches produced in the region was for human food which has grown significantly over the last three years. Almost all are manufactured in Brazil as pre-made pouches for retort vegetables such as corn, peas and mushrooms in replacement of the more traditional can.

The **non retortable other food products** category has seen growth of xx% per annum over the last five years reaching an expected xx billion units in 2013. The largest volumes, around xxx million units are accounted for by dried condiments, herbs, dressings and sugar sweeteners, mainly from Brazil. Peru manufacture around xx million units per annum for Panettone cakes, particularly for the Christmas season comprising a BOPET (17μ) / metallised BOPP (20μ) / PE (30μ) structure. Other products in this category include; frozen foods, baby foods, nuts, dried fruit, cereals and small volumes of confectionery.

SUP usage in the non-food category of **laundry, dishwashing and homecare** has been growing over the last five years at a rate of 10% to an estimated ……..

There have been small …..

3.3 Central & South American stand-up pouch market by pouch type

By far the majority, around 85% …….

Figure 5. Central & South American Stand-Up Pouch Usage – Pre-Made and Form-Fill-Seal

Total = 7.1 billion units

Source: PCI Films Consulting Ltd / Industry Sources

FFS tends to be …….

**Figure 6. Central & South American Stand-Up Pouch Usage 2013 –
Pre-Made Pouches versus Form-Fill-Seal by Category**

Source: PCI Films Consulting Ltd / Industry Sources

Pre-made pouches are calculated to represent no more than 15% of stand-up pouch usage across Central & South America. In comparison, around 55% of all stand-up pouches used in Europe are pre-made and over three-quarters of stand-up pouches used in the US are pre-made, mostly attributable to their dominance of retort pouches and beverages.

In Central & South America's largest ……

However, pre-made pouches are in ……

The rate of growth in the usage of …….

The growth of retort stand-up pouches, ……

3.4 Leading Converters of Pouches and Pouch Laminate

Almost three-quarters of stand-up pouches are supplied by 15 converters based in South America. Techpack Group alone with its five flexible packaging subsidiaries accounts for a third of supplies; and has c...............

Table 4: Central & South American Stand-Up Pouch Market Converter Market Shares – 2013 (million Units)

Flexible Packaging Converter	Form-Fill-Seal (Laminate reels)	Fill-Seal (Pre-made pouches)	Total Units	% Market Shares
Techpack Group				
– Aluflex (Argentina)				
– Alusa (Chile)				
– Peruplast (Peru)				
– HYC (Chile)				
– Empaques Flexa (Colombia)				
Bemis Dixie Toga (Brazil)				
Edelpa (Chile)				
B.O. Packaging (Chile)				

…………..

……………...
……………...

Techpack Group
Techpack was formed in 2013 as a ……..

Aluflex
Argentina-based Aluflex sold over 9,000 tonnes …….

Peruplast
Peruplast is Peru's largest flexible packaging converter……

Alusa
Chile based Alusa has annual flexible packaging sales ……..

HYC
Located in Santiago, Productos Plasticos HYC has seen its sales ……

Empaques Flexa
Colombia's number two flexible packaging converter …….

Bemis Dixie Toga
US-owned Bemis Brazilian subsidiary ….

Edelpa
Chile's largest converter, Edelpa produced ……

B.O. Packaging
Santiago-based B.O.Packaging sells around …..

Diadema
It is estimated that Brazil's Diadema S.A. has ….

…………

3.5 Central & South America Stand-Up Pouch Market Forecast

PCI is forecasting that stand-up pouch demand in Central & South America will grow by an average of xx% p.a. over the next five years to reach around xx billion units in 2018. Tomato sauce and mayonnaise will remain the largest sectors with average growth over the forecast period of xx% p.a. and xx% p.a. ……………

Table 5: Central & South American Market for Stand-Up Pouches by Category Forecast 2013 – 2018 (million units)

End Use Category	2013	2018	Av. % change pa 2013 to 2018
Tomato sauce (not ketchup)			
Mayonnaise			
Ketchup & other sauces			
Ground coffee & powdered drinks			
Retort food			
Other food & liquid drink products			
Laundry, dishwashing & homecare			
Shampoo & personal care			
Other non-foods			
Dry pet foods			
Retort pet foods			
TOTAL			

Source: PCI Films Consulting Ltd / Industry Sources

4 ECUADOR

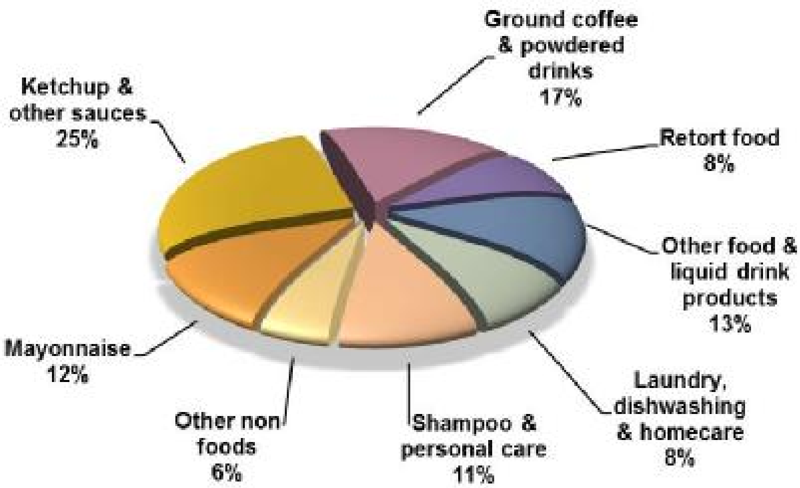
4.1 Market background and trends

Ecuador's cities are expanding rapidly, with new neighbourhoods and suburbs emerging among the large cities in the last five years and many small towns growing as well. This rapid development has left a void in the grocery retailing market in these areas, and supermarket chains have rushed in to capitalise. Modern grocery retailers such as Aki and Tia have been busy opening locations in these newer urban areas to entice consumers from all income groups and capture brand loyalty as the first grocery outlets in the areas.

Usage of stand-up pouches has been growing by about 15% per annum in Ecuador over the last five years, albeit from a small base. During this time, a number of multinational packers have invested in new filling lines, shifting away from rigid packs. Some locally owned packers have also installed new capacity.

Key converter suppliers of laminates for stand-up pouches packed in Ecuador include; Flexiplast with a share of around 29%, Neyplex 24%, Sigmaplast 20%, Plastlit 17% and imports 10%. Since January 2014 however, there has been a ban on imports into Ecuador of plastic which comes into contact with food.

Figure 7. Ecuador - Stand-Up Pouches by Category



Total = 144 Million Units

Source: PCI Films Consulting Ltd / Industry Sources

4.2 Consumption by end use

Ecuador's market for stand-up pouches is fairly evenly split among various applications with almost all categories having experienced double digit growth over the last five years. Apart from Brazil, Ecuador is the only other country producing stand-up pouches for retort food, mainly for tuna. The largest growth is found in the laundry, dishwashing and homecare products segment which grew by 25%, albeit from a low base during the last five years.

Table 6: Ecuador - Stand-Up Pouches by Category 2008, 2013, 2018 (million units)

End Use Category	2008	2013	2018	Av. % change pa 2008 to 2013	Av. % change pa 2013 to 2018
Tomato sauce (not ketchup)	0	0	0	+0%	+0%
Mayonnaise	8	17	26	+16%	+9%
Ketchup & other sauces	19	36	50	+14%	+7%
Ground coffee & powdered drinks	15	25	35	+11%	+7%
Retort food	9	12	15	+6%	+5%
Other food & liquid drink products	9	18	32	+15%	+12%
Laundry, dishwashing & homecare	4	12	24	+25%	+15%
Shampoo & personal care	5	16	30	+26%	+13%
Other non-foods	3	8	15	+22%	+13%
Dry pet foods	0	0	0	+0%	+0%
Retort pet foods	0	0	0	+0%	+0%
TOTAL	**72**	**144**	**227**	**+15%**	**+10%**

Source: PCI Films Consulting Ltd / Industry Sources

Tomato Sauce (not ketchup)

In contrast to some other Latin American countries, tomato sauce – i.e. paste accompaniments with pasta /spaghetti is not widely used in Ecuador and therefore not a major market for stand-up pouches. Tomato sauce in Ecuador is more likely to come in glass bottles. Pronaca and Nestle however, are using some pre-made pouches from domestic converters. Tomato ketchup is a more important application for stand-up pouches in the country.

Mayonnaise

Usage of stand-up pouches for mayonnaise in Ecuador has been growing by about 15% per annum reaching almost 17 million units in 2013. The two major users of stand-up pouches, all of which have spouts are Nestle with their Maggi brand (with about 70% market share) in a 340g size accounting for most volumes and a 220g pack, and locally owned company Los Andes. These are produced on form-fill-seal lines mostly supplied by Volpack and tend to be filled on the same machines as tomato ketchup. BOPET / PE (100 - 120µ) is the most common structure.

The main packers are the same as those associated with tomato ketchup and other sauces – Alimentos El Sabor, Pronaca and Markseal.

Ketchup & Other Sauces

Usage of stand-up pouches for ketchup in Ecuador is estimated at around 25 million units per annum. Key packers using stand-up pouches for tomato ketchup as well as some other products such as mayonnaise and other sauces include:

- Pronaca who have two form-fill-seal lines – one simplex (50 units per minute) and one duplex (90 units per minute). The company is thinking about installing a third line.
- Nestle via its Industrial Surindu subsidiary has two form-fill-seal lines, one simplex and one duplex and thinking of purchasing a quadruplex line capable of handling 240 packs per minute.
- Los Andes has three (simplex) lines.
- Alimentos El-Sabor who mainly uses pre-formed pouches sourced from Flexiplast.

Some other tomato ketchup packers use alternative formats such as flat sachets or rigid packs.

Most of the pouches are form-fill-seal and therefore supplied by local converters in reel form laminate comprising BOPET (12µ) / Alufoil (9µ) / PE (80µ). Some volumes comprise BOPET / met BOPP / PE and others BOPET / PE. About 95% of units are form-fill-seal packs and the remaining 5% pre-made pouches mostly supplied by domestic converter Neyplex. Domestic converters Flexiplast closely followed by Sigmaplast are the leading suppliers as is Neyplex.

Almost 6 million stand-up pouches per annum are estimated to be used for mustard and 5 million for other sauces.

Ground Coffee & Powdered Drinks

Usage of stand-up pouches for coffee and other powdered drinks amounts to around 25 million units per annum. Nestle is a major user for a range of products such as Nestea powder in doypacks with zippers. Nestle's Nesquick and Ricacao chocolate powder in 400g packs also come in stand-up pouches typically comprising BOPET / PE or BOPET / Alufoil / PE. Domestic converter Flexiplast accounts for at least 60% of these volumes which amount to around 50 million per annum.

Retort Food

At least 12 million retort stand-up pouches per annum are used by tuna packers in Ecuador and typically comprise pf BOPET (12μ) / BOPA (25μ) / Alufoil (12μ) / CPP (100μ). Some retort pouches are also used for pet foods which have the same structure except the CPP film layer tends to be 70μ. Approximately 80% of these pre-made retort pouches are imported, mainly from South Korea with some volumes also coming from countries such as Malaysia, with the remaining 20% being produced by domestic converter Plastlit.

Amongst significant users in Ecuador of retort pouches for tuna are local packers such as Marbelize, Salica, Isabel Ecuatariano and Tecopesca.

Other Food & Liquid Drink Products

Dried fruit

Over two million pre-made stand-up pouches per annum are being used in Ecuador for dried fruits. These comprise BOPP / metallised BOPP / PE and mostly supplied by domestic converter Neyplex and to a lesser extent Flexiplast. Terra Fertil is one packer using stand-up pouches.

Fruit concentrate

These stand-up pouches typically comprise BOPA / LDPE laminates and have contents of 300g.

Cooking oil

Some BOPET / PE stand-up pouches are used for cooking oil, typically for contents of 200ml or 400ml. The converter Flexiplast supplies in to this segment.

Other Foods

Amongst other food products using some quantities of stand-up pouches are olives, pickles and cereals.

Laundry, Dishwashing & Homecare

Floor cleaners and other liquid detergents

Usage of stand-up pouches for liquid detergents started comparatively recently in Ecuador.

Homecare

Some quantities of stand-up pouches are believed to be used for homecare products such as liquid floor cleaners. Stand-up pouches have begun making more significant in-roads into this sector only recently, replacing injection mould plastic bottles, especially for refills. BOPET / PE or BOPET / 7 layer co-extruded PE and EVOH structures are used for fabric conditioners – e.g. by La Fabril.

Shampoo & Personal Care

Shampoo

With a limited market demand, stand-up pouches used for shampoo in Ecuador tend to be pre-made amounting to around 7.2 million units per annum. Volumes are equally split between those supplied by domestic converter Neyplex and imports from Alico of Colombia. The packer Rene Chardone is a key user.

Wet Wipes

The usage of stand-up pouches for wet wipes in Ecuador has only started during the last five years and now amounts to around 4 million units per annum. These are pre-made zipper pouches comprising BOPET 12μ) / PE (120μ). Colombian-owned Familia with a plant in Ecuador uses around 2 million stand-up pouches, with volumes equally sourced from domestic converter Flexiplast and Alico of Colombia. The packer Zaimella uses about 1.8 million stand-up pouches per annum, sourcing all of its needs from Flexiplast. Volumes have grown substantially due to import restrictions on packaging.

Liquid Soap

About 5 million stand-up pouches per annum are used for liquid soap in Ecuador. These are typically packs with contents of 340 g, many of which end up being used in hotel, restaurant and catering establishments.