1.1 Austria

1.1.1 Economic Overview

- Population: 8.5 million (2014 estimate), increasing by 0.03% per annum
- GDP (purchasing power parity): US$387 billion (2014 estimate)
- GDP (official exchange rate): US$436 billion (2014 estimate)
- Austria has been a member of the European Union since 1995 and has participated in the Economic and Monetary Union since 1999.
- Austria is one of the top five most prosperous countries in Europe, with GDP per capita of US$46,500 in 2014.
- In 2009, Austrian GDP growth was affected by the world recession declining by almost -4%, although the introduction of stabilisation measures and stimulus spending caused a strong 2010 and 2011 recovery. In 2012, growth fell back and slowed further in 2013, but has since restarted to recover.
- In 2014 the main driver to the economy was exports, which benefitted from the gradual recovery in the euro area and the moderate improvement in the global economy. This is expected to be increasingly supported by growth in domestic demand which in turn is being boosted by the recently introduced policy of quantitative easing in the Eurozone countries.

**TABLE 1. AUSTRIAN ECONOMIC FORECAST**

<table>
<thead>
<tr>
<th>Key indicators</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015f</th>
<th>2016f</th>
</tr>
</thead>
<tbody>
<tr>
<td>Real GDP growth (%) *</td>
<td>3.1</td>
<td>0.9</td>
<td>0.2</td>
<td>0.3</td>
<td>0.9</td>
<td>1.6</td>
</tr>
<tr>
<td>Consumer price inflation (average %) *</td>
<td>3.6</td>
<td>2.6</td>
<td>2.1</td>
<td>1.5</td>
<td>1.1</td>
<td>1.5</td>
</tr>
<tr>
<td>€/US$ Exchange rate (average) **</td>
<td>1.39</td>
<td>1.29</td>
<td>1.33</td>
<td>1.33</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

Source: * IMF – World Economic Outlook April 2015; ** OANDA

1.1.2 Flexible Packaging Market Overview

**Background**
Austria’s flexible packaging market is estimated at around €xxx million in 2014, increasing by around xx% during the year.

Usage in area terms around xxx million m²

Flexible packaging consumption €xx per capita

National production is estimated at €xx million of which xx% is exported.

Imports xx% of national consumption, sourced primarily from southern Europe and Turkey but increasingly also from Poland.

Domestic demand for flexible packaging is forecast to grow by xx% p.a. over the next five years.

FIGURE 1. THE AUSTRIAN FLEXIBLE PACKAGING MARKET 2014

<table>
<thead>
<tr>
<th>% of European Total</th>
<th>Annual Data</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Production</td>
<td>xx%</td>
<td>€xxx</td>
<td>€xxx</td>
<td>€xxx</td>
</tr>
<tr>
<td>Exports</td>
<td>xx%</td>
<td>€xxx</td>
<td>€xxx</td>
<td>€xxx</td>
</tr>
<tr>
<td>Imports</td>
<td>xx%</td>
<td>€xx</td>
<td>€xx</td>
<td>€xx</td>
</tr>
<tr>
<td>Consumption</td>
<td>xx%</td>
<td>€xxx</td>
<td>€xxx</td>
<td>€xxx</td>
</tr>
</tbody>
</table>

Source: PCI Films Consulting Ltd/Industry Sources
Historic Drivers and Future Prospects

The main drivers for flexible packaging in Austria are mainly associated with intense competitive pressures throughout the supply chain, including:

- The importance of discount retailers, which continue to restrain prices throughout the supply chain.
- Intense competition, principally from lower cost Italian, Greek and Turkish converters. Imports from Eastern Europe, especially Poland have also been growing.
- The Austrian flexible packaging converting industry is overwhelmingly export focused on higher added value materials and dominated by two companies: Constantia Flexibles and Mondi Packaging. Exports of converted materials are estimated to account for 77% of national production.
- In the food sector the major brands are strong but retailer own-label products are becoming increasingly important. Some observers suggest that Austrian consumers are more discerning than their German neighbours and that product presentation is more important. However, as in Germany, Austrian consumers have a strong discount price mentality which is reflected in intense price competition amongst grocer retailers.

Austrian consumption of flexible packaging is expected to grow by just under x% in 2015 in value, as cost-price trends continue to be relatively stable. Value growth is expected to continue at around the same level to reach around €xxx million at current 2014 prices in 2019.

In area terms demand is expected to continue to grow by around xx% per annum over the forecast period.

1.1.3 Flexible Packaging Converters

There are 15 – 20 flexible packaging converters in Austria. The largest players include Constantia Flexibles, which dominates the Austrian industry, and Mondi Packaging. Other significant players include Coveris Flexibles Austria’s business Britton Unterland, Pawag, GIKO and Jodl Verpackungen.

Austria-based Constantia Flexibles, Europe’s second largest flexible packaging converter has two plants in Austria:

- Constantia Teich GmbH is, with sister company Haendler & Natermann, part of Austria-based Constantia Flexibles Group GmbH. Teich has its group headquarters and plant at Weinberg, Muhlhofen; 60km west of Vienna. The company now focuses on converting flexible packaging. This follows the restructuring of the Constantia Group in which the aluminium rolling operations were spun off in 2011 as a separate company listed on the Vienna stock exchange. The plant's converting activities are mostly centred on the production of aluminium foil and foil/paper/plastic laminates for dairy products, confectionery and other foods, pet food, pharmaceuticals and chemicals sectors. A very
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A high proportion of production is exported with Germany being by far the most important destination. Sales amounted to around €360 million in 2014 of which around 70% is estimated to be converted materials, the remainder being primarily semi-converted or unconverted aluminium foil, most of which is further converted elsewhere in the group.

- **Constantia Patz GmbH.** at Loipersbach, near Neunkirchen, Austria, has 335 employees and produces aluminium or aluminium laminate flexible packaging for dairy lidding, butter and margarine, soft and melting cheeses, pharmaceuticals and medical applications. An important focus of the business is on pharma and healthcare applications which account for a major part of Constantia Flexibles’ Division Pharma & Film. Annual sales are just over €120 million of which 90% is exports. Processes include flexo and gravure printing, lamination, lacquering, die-cutting and slitting. Over recent years the company has invested heavily in new lamination and cleanroom facilities.

Austria-based **Mondi Packaging** is a subsidiary of the Mondi Group, which was floated on the London and Johannesburg stock exchanges from Anglo American Corporation in 2007. Over the last ten years Mondi Packaging has built up a pan-European consumer flexible packaging business via acquisition and organic growth. Following its acquisition of Nordenia International in 2012, Mondi has emerged as Europe’s third largest flexible packaging converter after Amcor and Constantia Flexibles with around 5% market share.

Mondi Packaging’s consumer flexibles division is based in Vienna with production plants located in countries across both Western and Eastern Europe. The division has several Austrian plants:

- **Mondi Korneuburg**, with sales of around €60 million in 2014 and 165 employees, which converts materials for both food and non-food applications. The company ranks among Europe’s top four producers of premade stand-up pouches, producing around 1 billion premade stand-up pouches per annum, around 90% of which are retort pouches.

Two other Mondi plants in Austria are also involved to some extent in converted flexible packaging

- **Mondi Zeltweg GmbH**, which is part of the company’s Extrusion Coatings Division, produces flexible materials for the building, chemical, household goods, food and animal feed industries. Processes include flexo printing and prepress, extrusion coating and laminating. The plant has annual sales of around €70 million and 133 employees. Only a small proportion of their sales are understood to be added value consumer flexible packaging, with most being of semi-manufactured materials and for industrial packaging applications.

- Zeltweg, Austria-based **Mondi Napiag GmbH**, with 140 employees, was acquired by Mondi Packaging from the German PE film extruder and converter Bischof and Klein in 2007 and is part of the company’s Advanced Films and Coatings Division. The company produces polyethylene and barrier films including shrink films, flat films and cover hoods, surface protection films and lamination films. The company also manufactures nylon and EVOH barrier films of up to 10 layers for high value food products such as dairy products, fish,
meat and vegetables, as well as medical and chemical packaging. Process capabilities include extrusion, flexo printing, conversion and slitting. In 2011, the company installed a new Windmoeller and Hölscher 7-layer blown film extruder to produce up to 14-layer films with EVOH and PA as barrier layers. Annual sales amounted to €52 million in 2011 but only a small proportion relates to value added consumer flexible packaging.

**Coveris Flexibles Austria GmbH** business Britton Unterland, formerly Unterland Flexible Packaging GmbH) was sold by Mondi in August 2011 to private equity company Sun European Partners, itself the European affiliate of US-based Sun Capital. Sun Capital subsequently consolidated Unterland within UK-based Britton Group. In 2013 Britton Group was consolidated with four other Sun Capital portfolio companies: Exopack (US), and Europe-based Kobusch, Paccor and Paragon to form Coveris, a global rigid and flexible packaging group with annual sales of more than $2.5 billion.

Britton Unterland produces converted flexible packaging for consumer applications as well as extruding PE and cast PP films for packaging. Established in 1959, Unterland operates from a large single production facility at Langkampfen-Kufstein in Austria. The company has 320 employees and total annual sales estimated at around €115 million. Annual sales of converted flexible packaging for consumer goods and medical applications is estimated to amount to around €20 million, around 75% of which is exported.

**PAWAG**, with annual sales of around €25 million, has two plants at Wolfurt in north western Austria near the border with Germany. Products include biscuit wrapping laminates, individual wraps for chocolates, sachets for cosmetics and body care products, laminates for dehydrated foods, detergents, pharmaceutical sachets, sterilised foods and lidding materials. Processes include 8- and 11-colour gravure (two presses of each), duplex and triplex solvent-based and solventless lamination and bag making. Pawag was acquired Austrian paper carton and corrugated board producer Rattpack Group in July 2014.

Other converters in Austria identified by PCI are:

- Dvoral Verpackungen
- Jodl Verpackungen (annual sales: €19 million in sales. 155 employees.)
- GIKO Verpackungen AG – paperboard, spiral wound tubes and flexible packaging converters, annual sales around €30 million and 94 employees.
1.1.4 End Use Markets

The following information on the size and trends in end use markets in Austria are derived from Euromonitor and other sources and also identify the leading suppliers in each market. Readers should note that the market size data below should not be directly compared with PCI’s estimates of values and trends in flexible packaging usage. The following relates to the value and volume of packaged products sold in the Austria, while the PCI flexible packaging sales statistics relate specifically to the value of flexible packaging products that are packed in the country. As such, they also include products that are packed for export.

The Austrian packaged food industry worth almost €9.5 billion in 2014 grew in volume terms by just under 1% to reach volume sales approaching 2 million tonnes. Leading Austrian food packers include Unilever Austria, Berglandmilch GmbH, Mondelez Österreich, Iglo Group, Ferrero Group, Mars and Nestlé; collectively accounting for around 18% of packaged food sales in 2014.

Trends in the most significant end use sectors:

- **Retail volume sales in the Confectionery sector** grew by around 1.5% to 94,000 tonnes. Chocolate confectionery accounts for over two thirds of this volume, with sugar confectionery accounting for most of the remainder. Key suppliers include Mondelez Oseterrich Stork KG, Ferrero and, Lindt & Sprungli.

- **Demand for Snack Foods** grew by around 3% to reach almost 24,000 tonnes. Key Austrian producers include Intersnack, Lorenz Bahlsen Snack World, Seeberger, Kellogg and GM Persendorfer.

- **Volume sales of Baked Goods** were around 555,000 tonnes with moderate growth during the year of approaching 1%. The market continues to be dominated by artisanal volumes of unpackaged bread.

- **The Biscuit sector** continued to be dominated by the sweet variety during the year with manufacturers launching new innovative flavours to try and gain market share. The market grew in by about 2% with around 38,000 tonnes of biscuits being sold in 2014. Bahlsen, Josef Manner and Mondelez Österreich are the main suppliers.

- **Volume sales in the Dried Processed Food sector** increased by around 2.5% to over 60,000 tonnes during the year. Main suppliers include Unilever Austria with its leading Knorr brand and Josef Recheis.

- **Around 65,000 tonnes of Cheese** was sold in Austria during 2014, up by around 1% over the previous year. Berglandmilch, Gebruder Woerle and Hofer are among leading suppliers.

- **Yoghurt sales** continued to decline throughout 2014, falling by about -1% to 90,000 tonnes. Nöm AG and Hofer are the market leaders.

- **Austria’s Ready Meal market** grew by nearly 3% to around 40,000 tonnes. Leading suppliers include Dr Oetker and retailer own label brand Rewe International.
- Austrian **Coffee** consumption continued to decline at a faster pace of around -3% in 2014. Key suppliers include Tchibo-Eduscho (Austria) GmbH, Kraft Foods Osterreich and Nestlé Österreich GmbH for its coffee pods.

- **Pet Food** sales increased by about 1.5% during the year to around 150,000 tonnes. Leading suppliers include Mars Austria, Adolf Rupp Herrnmuhle, and Rewe Austria.

- The value of the Austrian **Analgesic** market increased by around 6% in 2014. Boehringer Ingelheim and Bayer Austria are among market leaders.

- In line with most other West European countries, Austria’s **Cigarette** market continued to decline, falling by nearly -1.5% during the year. Philip Morris remains the market leader.

**FIGURE 2.** AUSTRIAN FLEXIBLE PACKAGING MARKET BY END USE 2014

Source: PCI Films Consulting Ltd/Industry Sources
1.2 Cheese and Dairy

1.2.1 Flexible packaging materials/formats

The principal flexible packaging materials and formats used in the cheese and dairy sector include:

- Lidding materials for drinkable and spoonable yoghurts, dairy desserts, dairy creams and artificial creams, rigid plastic milk containers, etc. Within this area yoghurt and dairy dessert lidding is the most important, with formats including:

  **Single pots**
  - 30 to 70 micron aluminium foil (with lacquers, coex, PP and PE sealing layers) for lidding single-serve pots of spoonable and drinking yoghurt, frommage frais, dairy desserts, creams, etc.
  - Paper/metallised BOPET laminates for some yoghurt lidding, e.g. Müller.
  - Extrusion PE coated 90gsm paper.
  - Metallised and unmetallised BOPET with pin dots.
  - SPO filled polyolefin film with pin dots.

  **Thermoform-fill-seal multipacks**
  - Aluminium foil, 30 – 35 micron.
  - 45gsm paper//12 micron metallised BOPET laminates (*Mixpap* and *Polymix*).
  - Metallised and unmetallised BOPET and other substrates

- Paper wraparound labels (banderols) used in conjunction with thermoform-fill-seal multipack systems for yoghurts.
- Protective membrane (often aluminium foil) in conjunction with plastic tubs for yellow fats, dairy spreads and soft cheeses.
- Paper/aluminium foil and paper wrapping for butter and other yellow fats.
- Laminated and coextruded films for vacuum packed and flow packed hard cheeses.
- Stand-up pouches for grated cheese.
- Flexo printed HDPE film bags for milk.
- Laminate bags with zippers for reclosable packs especially for shredded and grated cheese.
- Flowwrap packs for hard cheese.
### Some Examples of Flexible Packaging Formats used for Cheese and Dairy Products

<table>
<thead>
<tr>
<th>Description</th>
<th>Image</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lidding of single pots and multipacks using coated aluminium foils,</td>
<td><img src="image1.png" alt="Image" /></td>
</tr>
<tr>
<td>metallised BOPET//paper laminates, paper, white/opaque BOPET films and filled polyolefins.</td>
<td></td>
</tr>
<tr>
<td>Milk bags and pouches of printed LDPE films.</td>
<td><img src="image2.png" alt="Image" /></td>
</tr>
<tr>
<td>Vacuum packs using polyamide laminates and co extrusions incorporating EVOH and polyamide.</td>
<td><img src="image3.png" alt="Image" /></td>
</tr>
<tr>
<td>Folded packs using aluminium foil//paper laminates, paper, aluminium foil and foil//film laminates.</td>
<td><img src="image4.png" alt="Image" /></td>
</tr>
<tr>
<td>Coloured dead fold films, mainly cellulose film.</td>
<td><img src="image5.png" alt="Image" /></td>
</tr>
<tr>
<td>Pouches with resealable devices – zippers and adhesive tape. Used for shredded or grated cheeses</td>
<td><img src="image6.png" alt="Image" /></td>
</tr>
<tr>
<td>Casings using polyamide multilayer coextrusions for soft and semi-hard processed cheeses.</td>
<td><img src="image7.png" alt="Image" /></td>
</tr>
<tr>
<td>Special breathable laminates of paper and cellulose film. Perforated BOPP//paper is also used where controlled permeability is not so critical.</td>
<td><img src="image8.png" alt="Image" /></td>
</tr>
<tr>
<td>Milk stick-packs, which have become popular with airlines and the food service sectors are also sold through supermarkets in the UK.</td>
<td><img src="image9.png" alt="Image" /></td>
</tr>
</tbody>
</table>
1.2.2 Flexible packaging trends

- Sales in the cheese & dairy sector grew by around 2% to €1,320 million in 2014, and accounted for around 10% of the European flexible packaging total.

- In area terms total European usage increased by around 2% to an estimated 3.6 billion m² during the year with volumes broadly segmented 50% single web / 50% laminate.

- Around 80 - 85% of sales in the category are in Western Europe although large investments in yoghurt production, especially in Russia and Poland, has seen Eastern Europe gradually accounting for a larger share.

- Die cut lidding used in yoghurt and dairy desserts is growing in value terms by around 3 - 4% overall.

- Flexible packaging demand for cheese has been broadly static overall.

- Usage in the category in area terms overall is forecast to grow by 2% p.a. to reach 3.9 billion m² in 2019.

**FIGURE 3.** EUROPEAN USAGE OF FLEXIBLE PACKAGING FOR CHEESE & DAIRY PRODUCTS BY CATEGORY 2014

![Pie chart showing usage of flexible packaging for cheese & dairy products by category in 2014.](image)

Total Sales = €1,320 million

*Source: PCI Films Consulting Ltd/Industry estimates*
**Sub-sector market shares**

Market share estimates in some of the major sub-sectors are broadly as follows:

- **Cheese and Dairy (yoghurt lidding and banderols):** Amcor 50%, Constantia 40%, Emsur 10%
- **Flexpap lidding:** Constantia 50%, Amcor 40%, Emsur 10%
- **Die cut lidding:** Constantia 50%, Amcor 30-35%, Clondalkin 5-10% plus others 5-10%
- **Hard Cheese:** Sudpack 35%, Wipak 20%, Amcor 15%
- **Soft Cheese:** Amcor 80-90% plus some minor French converters including Brodart.

### 1.2.3 Leading converter suppliers

Ranked broadly in order of flexible packaging sales into the cheese and dairy sector, the leading converters’ activities are briefly described as follows:

With its acquisition of Alcan Packaging’s European flexible packaging operations in 2010, **Amcor Flexibles** is now by far most dominant supplier to the cheese and dairy industry in the region.

- **Amcor Flexibles** is Europe’s leading supplier to the European yoghurt and dairy dessert lidding and banderols market. It is very strong in both hard and soft cheese packing with nylon-based laminates and EVOH coextruded barrier films. The company’s FlexCan reclosable convenience format is used extensively for packing diced cheeses. Paper-based materials used in the yellow fats market are also a speciality.

- **Via the ex-Alcan business Amcor is Europe’s leading supplier of Mixpap® and die-cut lidding, and an important supplier of yoghurt labels, aluminium/paper laminates for butter and other yellow fats, vacuum pouches and cheese packaging in paper, aluminium foil and plastic film. It is also a leading supplier of flexibles for cheese packaging from Amcor Flexibles Sarrebourg plant in France.**

**Constantia Teich**

Constantia Teich is a leading manufacturer and printer of lidding stock including reel fed material for thermoform-fill-seal machines and die-cut lids, and wrapping for butter, yellow fats and cheese. The company also supplies aluminium foil/paper laminates, glassine or greaseproof paper, in reels or sheets for butter and margarine.

**Clondalkin Group**

Clondalkin’s Netherlands-based subsidiary Vaassen Flexible Packaging (VFP) specialises in the production of heat seal lacquered lidding materials in aluminium and plastic, either punched or in reels for cheeses, butter and yellow fats and yoghurt. Subsidiary companies Chadwick's of Bury (UK) and Nyco (Switzerland) buy-in lid stock and print, die-cut and supply reels.
Wipak

Wipak is a leading supplier of printed and converted films for hard cheese, where it is the market leader in the UK and a number of other northern European countries. It supplies coextruded and laminated barrier printed and plain films for a range of packaging formats.

PCI estimates that Amcor, Constantia, Clondalkin and Wipak together account for around 80% of the value of converted flexible packaging used for packing cheese and dairy products.

Other important players within specialist sectors of this end use market include:

- Emsur Macdonnell (Spain) and Emsur Polska (Poland) – dairy lidding specialists and part of the Lantero Group, a large privately owned Spanish packaging group.
- Südpack – extruder of rigid and flexible polymer films and flexible and thermoformed packaging converter for food, including hard cheese, medical and hygiene products.
- Bemis in Finland, Belgium, and UK – produce a range of printed barrier films for cheese, including hard and respiring cheeses.
- German converter Leipa Georg Leinfelder – produces foil/paper laminates for yellow fats.
1.3  Alupol Packaging PLC

**Headquarters**
ul. Strefowa 4  
43-109 Tychy  
Poland  
Tel: +48 32 324 57 00  
Fax: ++48 32 329 11 55

**Company status:**  
Subsidiary of Capital Group, via Grupa Kęty SA

**Sales:** €100m (2014)

**Activities**
Flexible packaging converter

**Flexible Packaging Plants**
Poland (2) plus a new plant under construction

**Background**
Alupol Packaging is a business of Grupa Kęty SA, based at Kęty in southwest Poland. Kęty is the country’s leading manufacturer of aluminium foil based flexible packaging materials and aluminium profiles for construction, automotive and household products. Kęty was originally established as a state owned company in 1953 but is now publicly listed. The group, with 2,000 employees and total sales expected to reach around €400 million in 2014, has six operating segments comprising Extruded Products; Aluminium Systems; Building Accessories; Construction Services; Transport Systems; and Flexible Packaging.

The Flexible Packaging segment, **Alupol Packaging Plc.**, with sales of €100 million in 2014, operates through two subsidiaries, Alupol Packaging S.A. in Tychy and Alupol Packaging Kęty Sp. z o.o. in Kęty. Exports account for a significant proportion of production, mostly to the Ukraine, Czech Republic, Slovakia, Romania, Russia, Lithuania, Belarus, France, Italy and the Netherlands. The company has been successfully targeting more sales to Western European markets, which now account for more than 10% of total exports.

Leading customers include Nestlé, Unilever, Kraft Foods, Dr Oetker and Rieber & Son (Delecta in Poland, Vitana in the Czech Republic and Toro in Scandinavian countries), Perfetti Van Melle (Mentos, Fruitella, Chupa Chups), Ferrero (Rafaello, Kinder Bueno, etc.) as well as locally owned companies such as Kamis, Prymat, Mokate and Woseba.

- **Alupol Packaging Kety** in Kęty converts materials for a wide range of food and non-food applications including dairy products, dehydrated foods, confectionery, coffee, soups pharmaceuticals, cosmetics and tobacco products. Process capabilities include aluminium foil rolling, up to 10-colour gravure printing and multilayer lamination and in-house production of gravure cylinders.

In 2014 a new extrusion coating and lamination line from German supplier ER-WE-PA GmbH was installed in a dedicated production hall at the Kety plant. This is the company's third extrusion lamination line investment. In 2011 the company commissioned a new 9-
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Layer high barrier PE blown film line to produce the company’s new HBF-9 range of high barrier films. Also in 2011 the company commissioned a 500 metres per minute 10-colour Rotomec RS 400MP HS gravure press. The new line was part of a larger investment, which also included a Rotomec tandem extrusion laminator for producing multi-ply laminates.

- **Alupol Packaging Tychy** is located within Tychy’s Special Economic Zone that provides exemption for corporate and property taxes for ten years, with only 50% payable over the following eight years. The plant’s process capabilities include a new 9-layer high barrier PE blown film line installed in 2011, flexo printing, (4 presses, including two W&H presses installed in 2013 and 2014), lamination and paper and film metallising. End use markets served include food concentrates, confectionery, dairy products, tobacco and pharmaceutical products.

**TABLE 2. ALUPO PACKAGING’S FLEXIBLE PACKAGING PLANTS**

<table>
<thead>
<tr>
<th>Plant</th>
<th>Country</th>
<th>Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alupol Packaging Kety</td>
<td>Kety, Poland</td>
<td>Converts materials for a wide range of food and non-food applications including dairy products, dehydrated foods, confectionery, coffee, soups pharmaceuticals, cosmetics and tobacco products. Process capabilities include aluminium foil rolling, up to 10-colour gravure printing and multilayer lamination and in-house production of gravure cylinders. In 2014 a new extrusion coating and lamination line from German supplier ER-WE-PA GmbH was installed in a dedicated production hall. This is the company’s third extrusion lamination line investment.</td>
</tr>
<tr>
<td>Alupol Packaging Tychy</td>
<td>Tychy, Poland</td>
<td>Located in Tychy’s Special Economic Zone. Process capabilities include a new 9-layer high barrier PE blown film line installed in 2011, flexo printing, (4 presses, including two W&amp;H presses installed in 2013 and 2014), lamination and paper and film metallising. End use markets served include food concentrates, confectionery, dairy products, tobacco and pharmaceutical products.</td>
</tr>
<tr>
<td>Alupol Films</td>
<td>Kety, Poland</td>
<td>Plant under construction. BOPP film extrusion, film conversion and production of gravure cylinders.</td>
</tr>
</tbody>
</table>

In Q4, 2014 Alupol set up a new subsidiary Alupol Films, with plans to invest PLN 150 million (around €36 million) in a new film production and converting plant. The new facility is to be located in the Krakow Technology Park Special Economic Zone in Oswiecim, which attracts preferential tax treatment on the investment. Scheduled for completion in the first quarter of 2017, the plant will focus on film production and conversion of plastic films and the production of gravure cylinders. As part of this investment the company has recently ordered a new Bruckner 8.7 metre width BOPP film line for installation in 2016.