

Paper perfect

Created in 1952, EUROSAC is a European Federation headquartered in Paris, rallying the European multiwall paper sack industry. The organisation works closely with CEPI Eurokraft in the ESPACE Programme, and together they provide valuable guidelines and studies, including LCI and Carbon Footprint, Food Contact, and Dust-Free Paper Sacks. Every year, the key players of the European paper sack and sack kraft paper industry get together at the EUROSAC congress. In total, they represent a production of more than five billion paper sacks a year for different products and diverse customer needs. EUROSAC president **Luis Elorriaga** provides insights into the development of the market, innovations and growth opportunities for the future.

The theme of this year's congress was 'Performance powered by nature'. What did this entail?

Luis Elorriaga: The congress focused on communication. During its long track record, the paper sack has been undergoing constant refinement in accordance with the rising demands placed on modern packaging. Technological developments have turned it into a high-tech article with numerous positive characteristics that are equally in line with customers' packaging needs and environmental sustainability. Our task as an industry is to spread the word and communicate the benefits of paper sacks.

Under the umbrella of our communication campaign 'Performance powered by nature', we have developed useful tools to support our members in accomplishing this task. The congress was the perfect occasion to inform them about our materials and activities – and how they relate to the trends in the market.

Did you see a trend going into the conference?

During the congress, we explored new marketing trends in B2B communications, such as the advantages and challenges, and how to proceed when planning a campaign. We also looked beyond our own horizon to get inspiration from innovative promotion practices from other organisations. I would say that the trend you could see evolving was the rising understanding of how important communication is for a successful business.

Talking about success, how successful is the European sack market?

The European paper sack industry recorded a healthy growth of 1.8% in 2016. EUROSAC



From left to right: Entrants for the EUROSAC Grand Prix Award 2017, Mark van der Merwe (BillerudKorsnäs) and Joan Rovira (Mimcord) with EUROSAC president Luis Elorriaga and winner Wilhelm Dyckerhoff (dy-pack).

Statistics identified 'building materials except cement' (+ 5.3%) and 'milk powder' (+9.5%) as the strongest growth areas.

Since 'building materials' have the largest market share with 63% of the total market, this brings a solid contribution to our overall growth. In comparison, 'milk powder' is part of 'food and feed products', holding 22% market share.

What is the biggest growth area of 2017?

The figures from January to June show that the positive trend for 'building materials except cement' (+1.2%) and 'milk powder' (+2.9%) is set to continue. 'Chemical products' (+5.1%) is another sector with

continuing upward trend (+3.4% in 2016), whereas the overall paper sack market slightly decreased (-0.5%) in the first six months of the year.

What are some of the specific country results?

In terms of contribution to the total numbers of the European paper sack market, Russia and other European countries rank highest, with almost 408 million delivered sacks from January to June this year. They are followed by Germany (395 million), France (343 million) and Italy (323 million). So far, Spain (208 million) has reported the highest growth in delivered units for the first half of 2017



Product entries in this year's Grand Prix contest. Product entries in this year's Grand Prix contest with a rise of 4.3% compared with the same period in 2016.

How important is sustainability and responsible manufacturing to the value chain?

The paper sack is a key solution for environmentally friendly packaging, storage and transportation of powders. The pressure from legislation and the general public towards a sustainable value chain is growing. Luckily, sustainability is becoming more important for our customers as well. And, of course, responsible processes and manufacture are part of that.

Our industry contributes to sustainable development and engages in the conservation of natural resources and the protection of the environment.

“ The fibres used to produce sack kraft paper are 100% natural, renewable, biodegradable and can be recycled several times. ”

Can you give some examples?

Of course, let's start with our raw material. The fibres used to produce sack kraft paper are 100% natural, renewable, biodegradable and can be recycled several times. They are extracted from thinnings and process waste from the timber industry, and originate from sustainably managed forests in Europe.

The sustainable management of forest areas is a central element of the value chain for paper sacks. Due to the continuous replanting of trees, state-owned forests in Europe grow by 200 million square metres a year. They provide habitat for wildlife and recreational areas for people. In addition, they play a key role in climate change mitigation as they store carbon dioxide.

What is the European paper sack and sack kraft paper industry doing to contribute to sustainability?

We continuously invest in the refinement of our packaging solutions. We always aim to

combine environmental sustainability with state-of-the-art performance. As an example, the strength of sack kraft paper has improved by 45% over the past years, allowing a 25% reduction in paper consumption. This adds to the environmental credentials of paper sacks and reduces costs at the same time. Meanwhile, the porosity of sack kraft paper has also been improved by almost 30%. This results in filling speeds that are three times higher than those of non-paper sacks that are not porous. By optimising the raw material, and enhancing sack construction and design, we not only contribute to improving our sustainability credentials, but have also made paper sacks into innovative, versatile packaging solutions.

What are some other developments or innovations?

Ongoing research, development and innovation are very important to our industry. During the Eurosac congress, the industry's most creative developments of the past year were honoured with the Eurosac Grand Prix Award. This annual award is prestigious for our industry because it demonstrates our

creative strength and shows how many different solutions are available to our customers. The 2017 trophy was awarded to the German company dy-pack for its new bag-within-a-bag concept called dy-vest. According to the jury, it will bring the most added value to the industry and will fuel its future innovative spirit.

What is special about the winning sack?

It is the first valve-sack technology that fulfils the hygienic requirements of cleanrooms. The outer valve sack layer can be stripped from the inner sack. Thus, it combines the advantages of valve sacks such as fast and economical filling with the demands of the food and pharma industries.

Our other two nominées are also worth mentioning. BillerudKorsnäs presented RainSafe, a sack that withstands at least four hours of rain according to DIN EN ISO 2875 without water or vapour damaging the filled

product. Mimcord entered the Grand Prix with a multiply-cord handle for paper carrier bags. It is produced from 100% kraft FSC or PEFC-certified paper and increases production efficiency, as its different plies enable the handle to be glued more securely on the bag.

What does the future hold for the European sack market?

I am very optimistic about our future. We have extensive packaging know-how and industry expertise. With our innovative spirit, we design packaging solutions that best suit our customers' individual products, as well as their economic interests. We already offer products that perfectly meet our customer demands in an extremely sustainable way, and with rising demands for sustainable packaging solutions that offer efficiency and high performance at the same time, I believe that we are on the right track to success. Paper sacks already are – and will remain – the perfect packaging for dry bulk goods.

Is there incoming legislation that will affect the market?

What particularly affects the market at the moment are the demands of our customers rather than new laws or regulations. For example, in the food segment we must fulfill an increasing number of specifications and conduct more intensive audits. Another example is a rising demand for dust-free paper sacks.

In an investigation conducted by RISE in 2016, we found that less than 1% of paper sacks are damaged on their way from the filler to the retail store, which refutes the belief that FFS bags are impaired less than paper sacks.

Some of the major causes of damage include incorrect palletisation and forklift operations. The level of lost material varied greatly from store to store, suggesting that different procedures and handling practices have a significant impact on the sacks, and can thus be prevented by education on best practice. For this reason, we have recently published handling recommendations for paper sacks that are directed at all players along the supply chain: fillers, distributors and retailers. They are available for download on the EUROSAC website.

Besides that, we offer advanced sealing technologies and highly protective sack constructions that ensure tight closure and a high product protection. ■