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InFocus

SIG Combibloc Obeikan Corporate Magazine

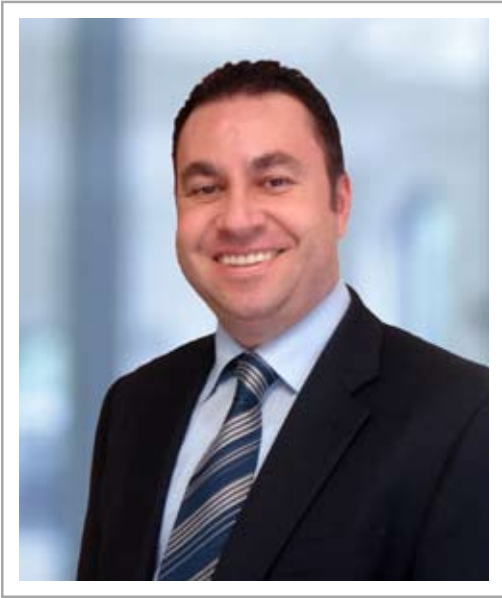
Energy drinks

The natural way!

Market Review

Libya





Dear Readers,

2010 has been a challenging year albeit the growth we experienced in our operational and customer base.

We look forward to seeing exciting new product ranges in Libya and Egypt in the next year. Keeping the fast developing Libyan market in mind, a study on 'Usage & Attitude of Libyan consumers' was conducted by the leading research Agency Nielsen for SIG Combibloc Obeikan on both Dairy and NCSD market in Libya. In this issue, we share a few highlights of the study for the Libyan NCSD market. The retail sector is all set to boom in Libya and other parts of Northern Africa and we definitely see a huge potential for long-life beverages. Although the market in Libya is small, the consumption rate is much higher and comparable to growing economies world-wide.

In addition, we are also pleased to announce the addition of a key country like Turkey under the SIG Combibloc Obeikan region.

SIG Combibloc Obeikan will celebrate 10 years of operations in 2011. We owe our long-term growth to the dedication of our employees; value provided by our share-holders and of course to you our loyal customers.

Wishing you all the best for the coming year and we hope you find this edition of the InFocus both informative and relevant.

Yours Sincerely

A handwritten signature in blue ink, appearing to read 'Ali Suat Oz', with a stylized flourish at the end.

*Ali Suat Oz
Sales and Marketing Director - Central*



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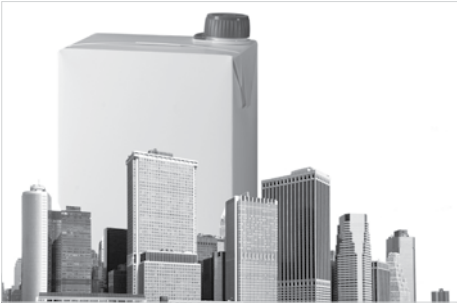
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Our network in the region



The Green solution from SIG Combibloc: FSC certified and *combibloc EcoPlus* carton packs

The challenges of the Packaging Industry are to provide the means of a long-term environmentally viable solution to reduce carbon footprint and CO₂ label while reducing overall wastage through creating 100% recyclable and lightweight packaging.

For the first time, a European-wide life-cycle assessment for food metal cans, glass jars, carton packs and pouches has recently confirmed that using carton packaging saves CO₂ emissions and fossil resource consumption by up to 60%.

Aseptic and the retortable carton packaging systems showed the best results in nearly all environmental impact categories (with the exception of the “use of nature” category), in terms of resource consumption and substance emissions.

Cartons: Renewable. Recyclable. Resourceful.

At up to 75% of the carton content, pulp fibre obtained from wood is the main component of aseptic carton packs. And this is what makes carton packs fundamentally different from other types of packaging used for beverages and long-life foods. When sourced from responsibly managed forests, wood is virtually infinitely available. Responsibly managing forests means sustainably maintaining their ecological, social and economic value.

Since 2009, *SIG Combibloc* has been certified in accordance with the criteria of the Forest Stewardship Council (FSC) for a complete chain of custody verification (CoC). This system ensures that only timber from well-managed forests and other controlled sources is used in the production of SIG Combibloc carton packs. ‘This allows us to make an effective contribution to sustainably maintaining one of the most important natural carbon dioxide sinks of all, our worldwide forests,’ explained Rolf Stangl – CEO of SIG Combibloc Group, this year at the UN’s Business for Environment

Conference. ‘Using renewable, low-carbon raw materials are an important factor in creating a climate-friendly economy.’

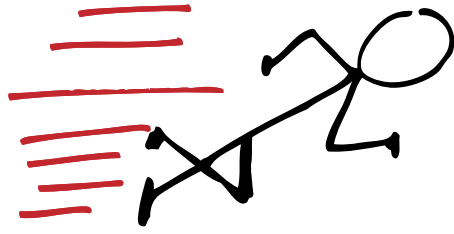
In addition, this year SIG Combibloc also achieved membership with the Forest Stewardship Council. This will enable us to further expand our FSC network and to represent the interest of SIG Combibloc and its customers at the highest level of the FSC organization. We hope to further increase the awareness of FSC labeled products/ cartons in the market and work together for a brighter and green future.

combibloc EcoPlus carton pack: Innovation for the Environment

combibloc EcoPlus the latest innovation from SIG Combibloc. *combibloc EcoPlus* is an aseptic carton pack for liquid food that cuts down CO₂ by 28 per cent compared to a 1-litre carton pack of the same format, thanks to a special new cardboard composite. This reduction in CO₂ has now been confirmed by an independent, critically reviewed lifecycle assessment conducted by the Institut für Energie- und Umwelt-forschung (IFEU/Institute for Energy and Environmental Research) in Heidelberg, Germany. *combibloc EcoPlus* contains more than 80 per cent wood fibre, which is obtained from wood, a renewable resource.

Milch-Union Hoheifel eG (MUH) is to be the first company in the world to launch *combibloc EcoPlus*. MUH, one of the biggest manufacturers of long-life dairy products in Europe, will initially be offering UHT milk in a range of fat content grades in *combibloc EcoPlus*, providing a plus for the environment.





Energy – the natural way!

The current market is flooded with ‘Energy’ drinks that claim to replenish lost nutrients and help enhance mental and cognitive performance as well as increase subjective alertness.

Fatigue and low energy levels in general are a recurring issue with many adults and students today especially with taking into consideration the fast-paced lifestyle and poor eating habits, “You may also find it harder to concentrate on tasks, and, eventually, you can also find your patience grows short and your level of frustration rises, even when confronted with seemingly simple challenges,” says New York University nutritionist Samantha Heller, MS, RD. Many of the popular women’s magazines and health websites are tackling the issue and provide consumers with alternative ways of finding their hidden energy reserves.

Consumers today are also more aware of the health risks that come with products that boast ‘instant’ added-value whether it is weight-loss, beauty or energy. For long-term mental agility and overall rejuvenation, regular consumption of natural ingredients that provide functional benefits is beneficial



Drinks with a difference

Natural energy drinks are soft drinks with a boosting and stimulating effect without the adverse effects of artificial ingredients and high-sugar content as is usually available with synthetic energy drinks.

We would like to highlight a few of the ‘Power Herbs’ that specifically contain properties that help banish fatigue and exhaustion.

Ginseng

Ginseng is a well-known ‘power herb’ with a reputation for promoting the body’s ability to defend against stress, increase energy levels and vitality. This plant is usually found growing in Eastern Asia and under cool climatic conditions.

Drinking yoghurts or Ready-to-drink teas with ginseng are a few of the ways to effectively integrate this herb into your product concept targeting the growing needs of a health-conscious market.



Guarana

A climbing plant native to Brazil, the Guarana fruit which is about the size of a coffee bean is known to contain twice the caffeine found in coffee beans and is therefore gaining popularity for its potential to provide a natural ‘instant’ lift without the harmful effects of synthetic versions.

Combined with other healing herbs or super fruits like cranberries, Guarana based-drinks can make for a quite effective non-carbonated energy drink that is also delicious.

Green Tea

One of the most popular varieties of tea available today, consumers are already aware of the health-benefits and anti-oxidant properties of green tea. Tea also provides smaller doses of caffeine and 2- 3

cups a day is recommended for maintaining a good level of overall energy and unlike strong coffee it does not mimic the body’s stress reactions and cause hyperactivity.

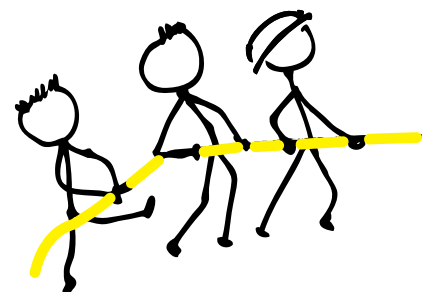
Rhodiola

Also known as the ‘Golden Root’, is a plant that is native to cold Siberia. The plant has become increasingly popular especially after the well-known physician Dr. Mehmet Oz appeared on the popular TV show – The Oprah Winfrey Show and recommended it as a natural remedy against anxiety and stress. It is also known to boost energy and alertness and many people are finding the plant extremely helpful in battling fatigue due to prolonged physical or mental activity.

Rhodiola tea itself is considered to have a strong medicinal taste and is therefore best when mixed with fruit juice or other herbal teas.

With natural energy drinks, producers can diversify their product portfolio and target the growing base of health-conscious consumers who seek alternative remedies to combat daily stress and fatigue.

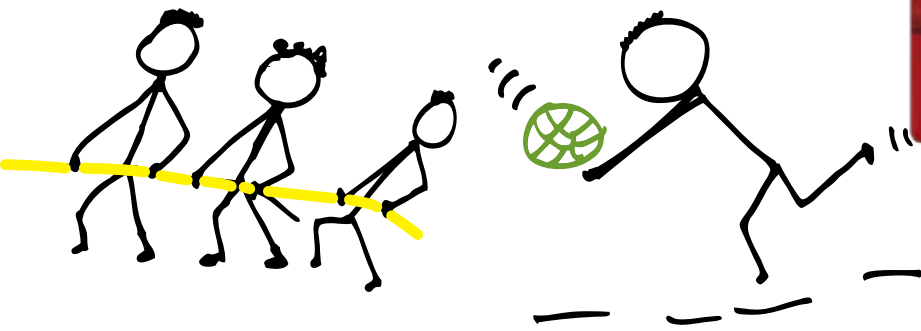
If you would like a comprehensive list of Power Herbs and Super Fruits that can add-value to your product portfolio, please contact the marketing team at SIG Combibloc Obeikan: info.cbob@sig.cbob





Eckes-Granini from Finland produced Fruit juice drinks enriched with guarana and B-vitamin in combiblocPremium 750ml aiming at mental fitness and alertness.

Lactasoy brings out the benefit of green tea and combines it with the nutrition of Soy Milk for a healthy drinking experience that is also delicious. The Soy milk with green tea extract is available in combiblocMini 125ml and 250ml packs – perfect for teenagers and adults on the move.

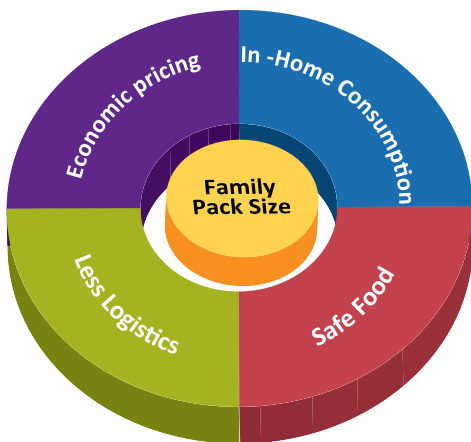


combiblocMaxi – Maximize value and refreshment!

People are reviving traditional values and ethics - from making smarter purchase decisions to consuming more often at home and enjoying family dinners.

Consumer Behavior and Pattern changes

The current economic scenario has also driven consumers to remain with their families. Multi-generational family structure is once again gaining popularity in cities that once celebrated smaller families. In the Middle East and certain parts of Africa, the family size average consistently remains high despite the sudden influence of a more cosmopolitan lifestyle.



The BIGGER picture: combiblocMaxi advantage

Price sensitive: A new desire for simplicity combined with a demand for the product is driving consumers to look for ‘economic packs’ that are in line with the ‘value for more’ concept.

Family Pack: Consumers have become ‘more conscious’ of their purchasing decisions. Rather than buying smaller formats, larger and medium households prefer buying their favorite product in bulk quantity multi-serve packs enabling them to also reduce costs.

In-the-home consumer: Consumers are also trading up on quality food and drink brands to eat at home.

Food safety: Consumer who purchases food and beverage for home use also

value safe and sterilized food which lasts for a longer period and aseptic packaging definitely answers this requirement.

Reduce logistics: The larger pack sizes translates to less trips to the store and product that lasts longer.

‘Upsize’ appeal: Marketers have ‘upsized’ consumption and targeted customers through promotions that provide ‘more product’ for the same cost – increasing both brand loyalty and consumption habits. The large pack inevitably increases consumption as once the pack is opened consumers tend to finish the product and also over-time get used to the same quantity. Major global corporations have always followed this strategy to increase consumer purchases of their product.



Leche Celta, one of Spain’s leading dairy brands for UHT milk launched ½ liter free campaign in cb4 2000ml as sign of their commitment towards customers .

Maximum value for the Food Sector

It is worth noting that in terms of striking a balance between the growing demand for quality and the high pressures of time and costs, modern packaging forms and the method of safeguarding food associated with these play a crucial role. More and more food manufacturers are breaking new ground in terms of keeping food in good condition and opting for materials that hitherto have rarely been used in the food service industry.



Specifically for the food service sector, Casalasco/Boschi fills its popular Pomi-brand tomato products in the carton pack combiblocMaxi 1,500 ml

Aseptic carton packaging for foods is fast becoming a popular and safe packaging solution. For a long time, carton packs were only used for milk and fruit juice, sold to the public in a fill volume of 1,000 ml.

Today, technological progress has also made it possible to aseptically package more complex filling goods – rice pudding, for instance, or tomato sauce with pieces of vegetable in it – in carton packs with volumes up to 2,000 ml. In this process the food is briefly heated to ultra-high temperatures, immediately cooled down and then filled into sterilized carton packs. The natural nutrients, vitamins, flavours and colours are largely retained. Many of the carton packs used in the food service sector are provided with a perforation so that the carton pack can be opened quickly and safely.

If you would like more information on the technology, volume flexibility and closure possibilities behind the combiblocMaxi, please get in touch with one of our sales personnel at SIG Combibloc Obeikan: info.cbob@sig.biz





Libya Market Study: Usage and attitude towards Packaged NCSD market

A 'Usage & Attitude' study was conducted recently by the research Agency AC. Nielsen on behalf of SIG Combibloc Obeikan in Libya to understand the various habits and attitudes of consumers pertaining to the consumption of packaged milk and packaged fruit juices.

The Study provides lots of learning and valuable input about the consumption behavior of the Libyan consumers. This info helps when reviewing the market approach, planning a communication campaign or positioning a product.

Research Methodology and Target Respondents

A quota based sampling methodology was adopted to select and recruit respondents and interviews were conducted face to face using a structured questionnaire.

The target respondents were a veritable mix of all socio-demographic classes from an age group that covered 15–50 year olds consisting of both male and female participants.

Key Segments: Respondents

As a result of the survey and through considering the key variables, consumers could be clustered into 4 main consumer groups. They are as follows:

Health conscious homemakers: This segment comprises almost entirely of women who are mostly housewives or working part-time. Another significant proportion of this segment is also students.

They are highly self-focused and motivated by personal development. They are conscious about their looks and appearance and discerning when it comes to food choices. Of the 4 segments, they are most inclined towards an active life of exercise and outdoor activities. They have a high tolerance to handle risk.

Conformist worker bees: This segment is made up of male workers engaged in a full time job. They are in the age band of 20–40 and largely hail from Benghazi. Majority of these workers work in government sector and are mostly from the lower strata of the society. This segment of the people are conscious about their image amongst their peers but are not constrained by the dictates of fashion. They are health-conscious and inclined to exercise regularly and watch what they eat. They set high expectations on themselves and on products/services they consume. They have a strong appetite for adventure and risk.

Yuppie Divas: This exclusive club of women is spread across the age groups and Social Economic Class (SECs). They are either house-wives or students who are financially dependent on other members of

the family. They are highly price conscious and at least willing to take risks or try new products. As the most fashion conscious of the 4 segments, they are watchful of their appearance and thus strive to be in good shape and not consume unhealthy food. They maintain a very active lifestyle but prefer to spend time with family rather than friends. They yearn to live life to the fullest and are always looking at having a good time.

Indifferent Slackers: This segment of Libyans is almost exclusively males who are either working part time or are students. They hail from the higher SECs of the society. Amongst the 4 segments, these people have the most laidback attitude about most aspects of life; they are staunch Slackers who prefer staying indoors than being out and active. They are also highly traditional and are least interested in fashion or current trends. They do not mind consuming junk food and are rather averse to exercise & physical fitness.

Package Aseptic Fruit Juice: Purchase and Consumption

Product quality attributes such as naturalness & taste and ease of storage are

some of the most influential factors affecting purchase decisions of consumers. Factors which have less influence are shopkeepers, In-store promotion, TV advertisements and company image.

When it comes to purchasing, Libyan consumers buy packaged juices on a daily basis and this is more frequent among women than men. *The Multi-serve 1 liter packs are more popular followed by 2 liter and 200ml aseptic packs.* Understandably, consumers buy more quantities of smaller packs on a trip to the market as the volume is less and these are used as on-the-go refreshments and are single use.

The future of long-life Juice is quite promising in the Libyan market as consumption has gone up significantly - *more than 2/3rd of the consumers have increased their consumption of long-life fruit juice in the last 1 year.* Fresh milk & carbonated soft drinks show much lesser change compared to packaged juice.

Cocktail flavor is the most popular flavor in Libya among packaged fruit juices followed by Orange & Mango. However, women and

higher SEC's (socio-economic class) are more prone to making blends of juices than their counterparts. Men are more brand loyal while women in particular care about the flavour rather than brand.

Occasions of Consumption

Packaged fruit juices are preferred for consumption during various occasions whether indoors or on-the-go. Unanimously, it is preferred during large social gatherings with friends or family and followed closely by general consumption at home. Men seem to prefer drinking juices with their meals while women seem to prefer drinking juices between meals. Most Libyan consumers also enjoy drinking packaged juices at special events like sports or concerts.

Libyan Attitude towards Beverage Consumption: A snapshot

Most of the factors lead to the conclusion that *Libyan consumers are quite discerning when it comes to health and the overall quality of their beverage.* Companies would do well to keep this in consideration and explore new flavour options that provide health benefits and great taste experience

to their customers as maximum increase in consumption is seen among Health-Conscious homemakers.

Fruit juice packages in cartons are the most popular type of packing because they are perceived to be healthier and provide better storage options. The growth in this category definitely has tremendous scope.

The *best segment for companies to target in Libya is the 'Health-Conscious Homemakers'.* They constitute the majority of the consumers of packaged fruit juice and bring in the added advantage of those who are open to try out new healthier products. They are also 'early adopters' and can further influence the consumption amongst family members & peers.

This article covers only a small segment of the survey results. **For more information on the Usage & Attitude study towards Packaged Beverages** conducted in Libya, please contact our Market research specialist – Ayed Katrangi: ayed.katrangi@sig.biz

What consumers have to say about aseptic carton packaging!

Cartons are easy to open & consume

Cartons have a large capacity

Cartons are suitable for family & kids'

Cartons are the best types of packaging to maintain content

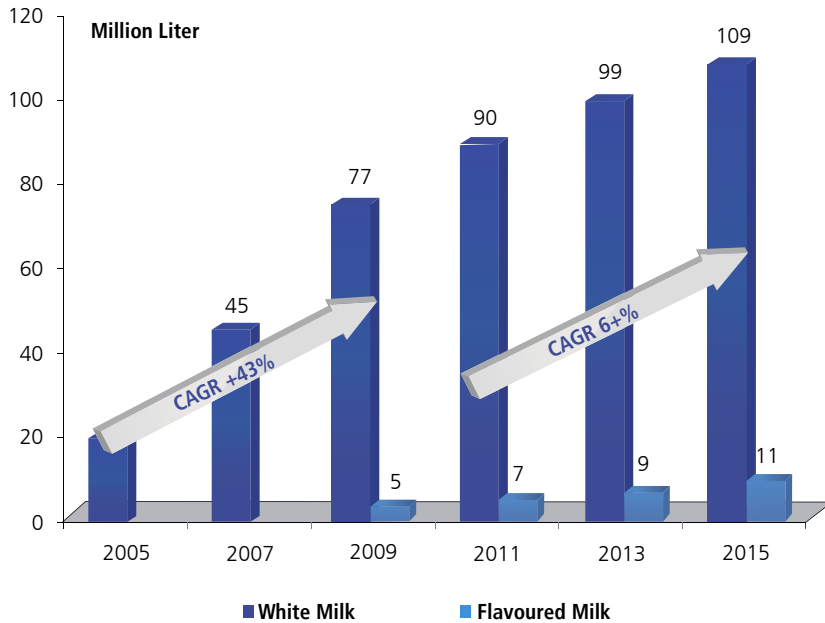
Cartons are healthier than others'



Liquid Dairy and NCSD Market Review: Libya

Ambient Liquid Dairy Production

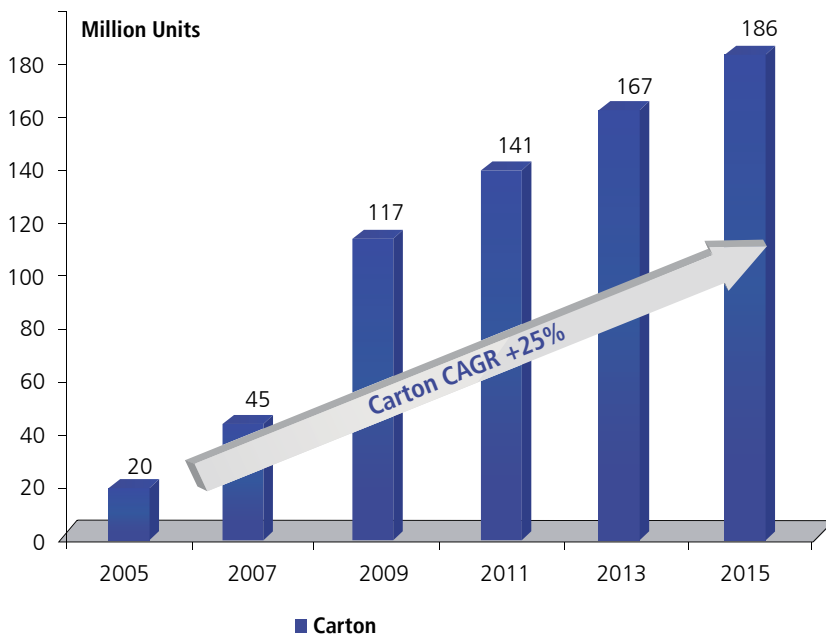
Product Type



- Production of ambient white milk has grown significantly due to the emerging of new private sector local dairies. This is in addition to improvement in the distribution structure in Libya.
- Flavoured milk is a recent addition to the domestic production market. This segment was previously dominated by imports.
- There is no local production of cream, concentrated milk and condensed milk in Libya.
- Short life milk is mainly supplied by public dairies and this continues to decline due to the lack of cold-chain distribution.

Ambient Liquid Dairy Production

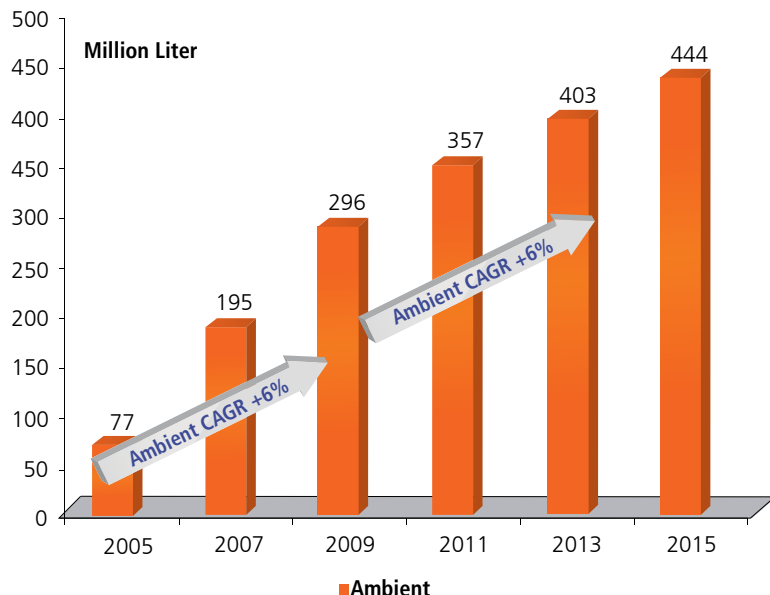
Pack Type



- Carton pack accounts for 100% of the total ambient market in 2009.

Total Ambient NCS D Production

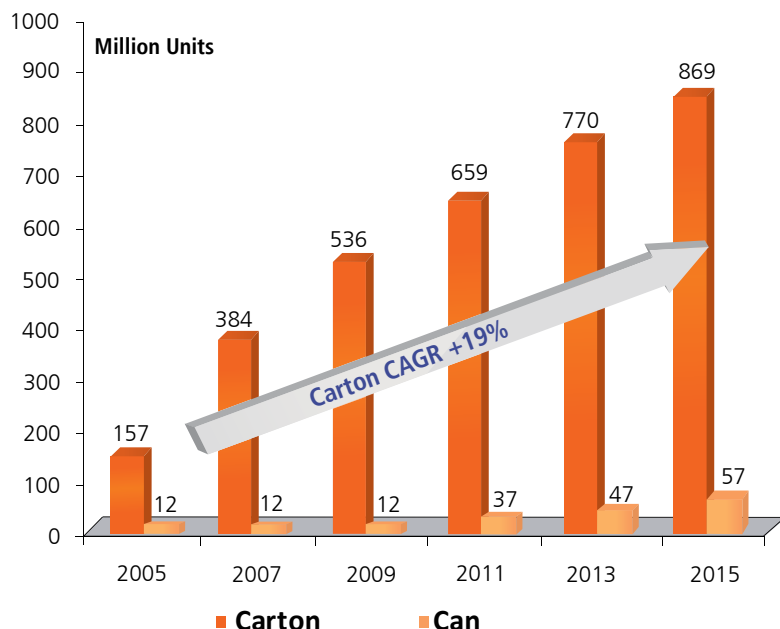
Product Type



- The recent development of domestic NCS D production has resulted in significant volume in market growth.
- Local producers are still struggling to meet the high market demand.
- The geographical gap among the suppliers distribution network is a reason for further potential growth in the NCS D market.
- While some unofficial exports do exist from few wholesalers to neighbouring countries, it is still a significant opportunity to expand the domestic production.

Total Ambient NCS D Production

Pack Type



- Carton remains the main pack type which accounts for 99% share in 2009.

Libya General Indicators:

Population	:	6.5 million
Median Age	:	24
Population Growth	:	3%
GDP	:	\$ 96. 00 billion
GDP Real Growth Rate	:	10.6%
GDP per capita estimate	:	\$15,000
Inflation	:	4.5%
Currency	:	LYD (Libyan Dinar)

Source: IMES 2010 Report / World Fact Book



Secondary Packaging: Tray quality impact on product safety

Storage and stacking logistics within the warehouse is an area of rapidly increasing importance because the yard space to stock the growing number of containers has become a critical resource and faulty secondary packaging protocols compromises the integrity of the carton packs and product within.



In this article, we highlight the importance of providing the right information to the SIG Combibloc Obeikan Project team and the test conducted on your trays in order to ensure your secondary packaging fits the industry quality requirements.

Project Questionnaire for customers:

Customers would benefit from providing the following information to the SIG Project team in order for them to provide you with recommendations on your tray specifications:

- General Conditions – pertaining to road conditions and humidity.
- Loading process – whether automated or manual how many loading processes > (high stress by forklift handling!)
- Specifications regarding to aseptic packaging format and volume size.
- Straw format and dimensions.
- Product specification - Milk or Juice, high or low foaming products!
- Tray Format required e.g. 5x6 or 3x6
- Pallet dimension, pallet protection by wrapping or shrinking.
- Any kind of information about the customer logistic chain which impact the tray stability. E.g. Container transports.

Once the information is sent across, the Project team can provide the customer with the following recommendations:

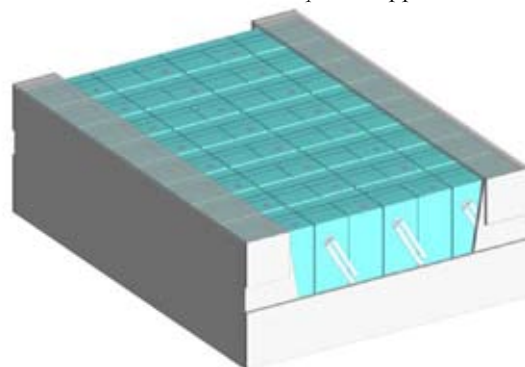
- Tray Design with recommended BCT (Box compression Test) value (Most important testing references)
- Pallet Pattern with Maximum Utilization to reduce the dynamic force on the product.
- Certain height of the layers to be recommended to minimize the static powers on the aseptic carton packs. Recommended number of pallet layers regarding combibloc carton pack format and volume.
- Pallet stacking methods (column or interlock stacking of trays) that also affect the stability of the trays.

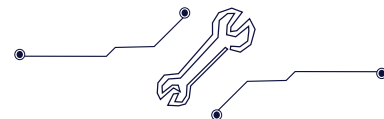
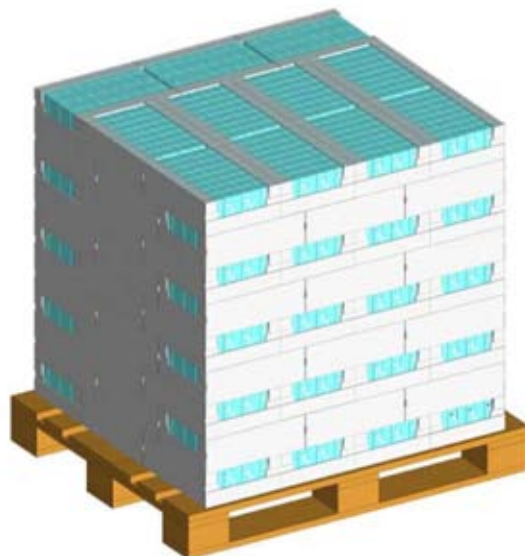
SIG Combibloc testing for Secondary Packaging

Customer can avail SIG Combibloc testing services on special request.

A tray or box will be compressed in the SIG R&D laboratory by a compression test machine. The machine monitors the stroke and force while compressing the box. Due to this curve an estimation of the suitability for the application can be done.

The (Box Compression Test) BCT-value shown in our tray drawings will be calculated by an empirical developed formula. The weight load of the lowest level will be calculated with safety and stress factors to an estimated dynamic stress. Customers must keep in mind that BCT-value **is only estimation and the basis of the SIG recommendation for the quality of the tray and this varies from package format, volume and tray dimensions.** The quality and material of the corrugated cardboard has to be specified by the supplier of the tray.





Quality Requirements of the tray as a Secondary Packaging

There are certain quality requirements when it comes to choosing your (Secondary packaging) quality of corrugated board of the tray and they are as follows:

- Box compression resistance (or Top to bottom compression strength), the BCT-value is the overall value and includes the quality of the corrugated cardboard (ECT-value) and the production quality of the manufacturer.
- Edge crush resistance of the Paper (ECT-value) – again a quality feature for manufacturer of corrugated cardboard.
- Flatness of the tray blank > important for the handling in the tray packer.

Secondary packaging solutions are always specific and have to be adopted to individual customer needs and retails requirements. This overview is a check-list for tray solutions. It's not all-embracing. Additional customized solutions are possible, but have to be discussed individually.

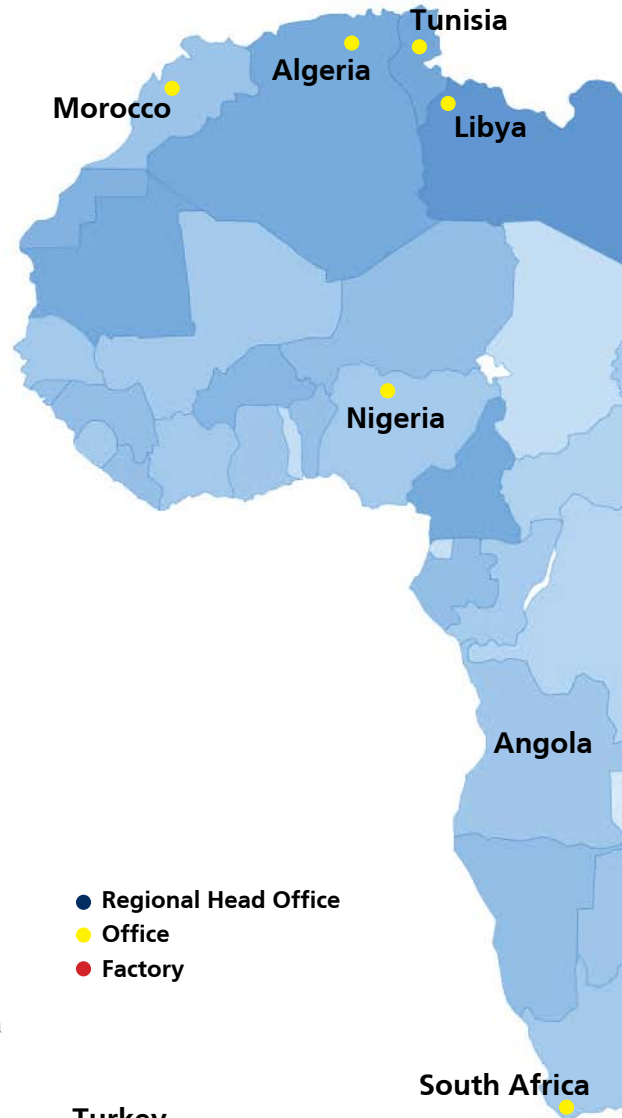
It is imperative to note that logistics is an essential part of your supply chain and ensures your products are delivered safe and sound to your customer. Not adhering to tray stacking and storage protocols recommended by your SIG Combibloc Obeikan project team can result in leaking packages which also effect the sterility and quality of your product.

Please get in touch with the SIG Combibloc Obeikan project team for further information on optimizing your secondary packaging: info.cbob@sig.biz





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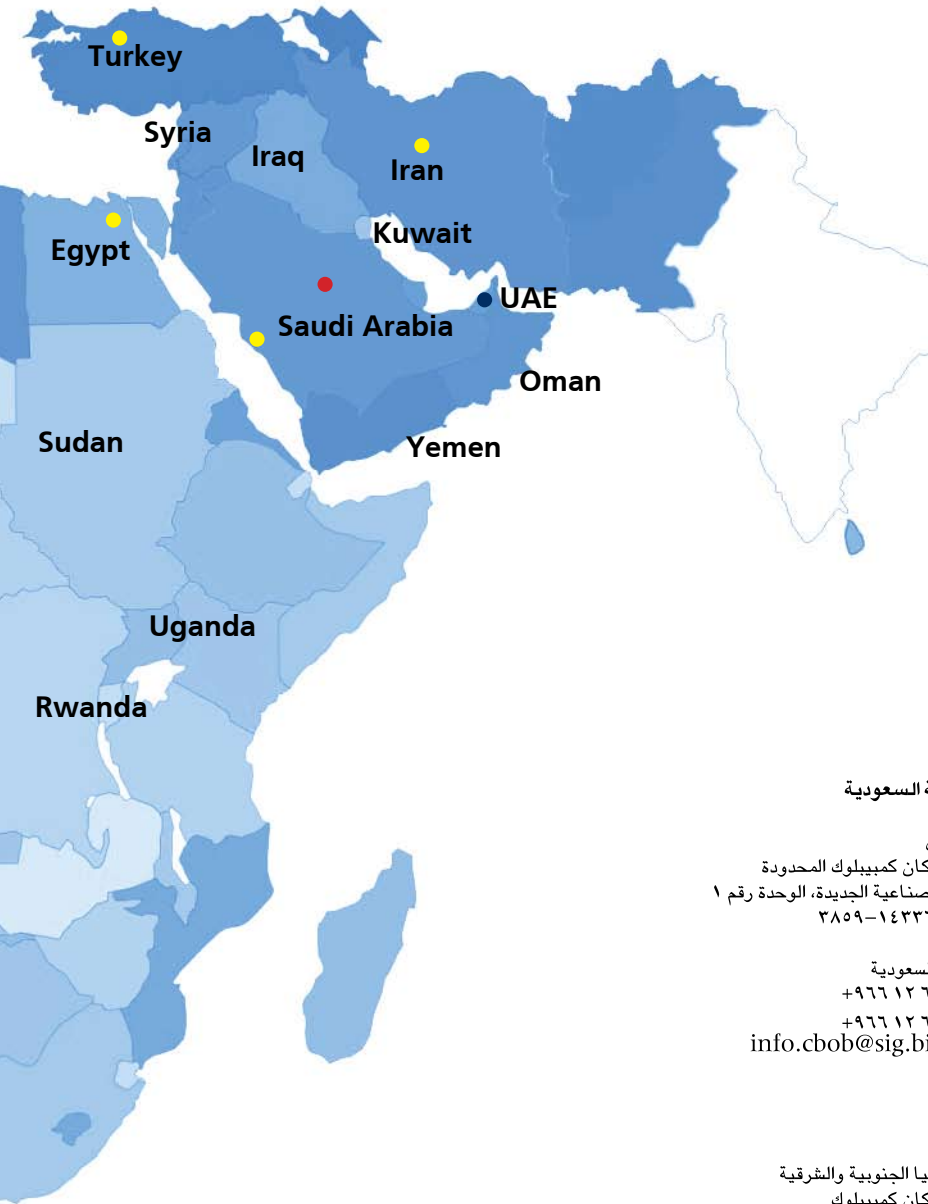
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