



Guala Closures Group

Roundtable:
“A new deal for the European Industrial Renaissance: concrete measures towards a competitive and sustainable economy”

Rome, 18 November 2014



Welcome to our world



1960

protect
the quality

Guala
chiusure speciali

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Typical bar in Europe



Typical retail in Africa



Global Counterfeiting

Product counterfeiting in the world

7 – 9 %

Of goods produced worldwide are counterfeit *

705 billion dollars

the estimated value of counterfeit goods sold in the world **

1850%

the estimated global increase of counterfeit goods from 1994 to 2011 *

More than 270.000

jobs lost during the past 10 years due to counterfeiting *

125.000

jobs lost in the European Community *

* source INDICAM / ** source WCO

Percentage of counterfeit products in total manufactured goods:

25%	Audiovideo
21%	Fashion
20%	Pharmaceutical
12%	Spirits
12%	Toys
10%	Perfumery
5%	Watches

Safety closures: main features

NON-REFILLABLE valve system

to protect the liquid



MATERIALS COMBINATION: plastic and/or aluminium for aesthetical enhancement

DECORATION TECHNOLOGIES: aesthetics & new generation security printing

2003



With aluminium we boost not only security, but also brand image





Decorative closures: endless design possibilities

Creating a brand identity which is unique and unmistakable is essential for a winning marketing policy





For manufacturers, creating a **unique** and **distinctive brand identity** is a determining factor in a winning market strategy.

Packaging is a part of this strategy.

Closures are proving to be an increasingly important part of **image**, along with the choice of the bottle and the design of the label.

Aluminium became a fundamental material for this.



NEW ART DECO BOTTLE FOR TANQUERAY 10

- Unexplored frontiers for aluminum
- Super premium aesthetic
- Top and side embossing
- Cutting edge process technology



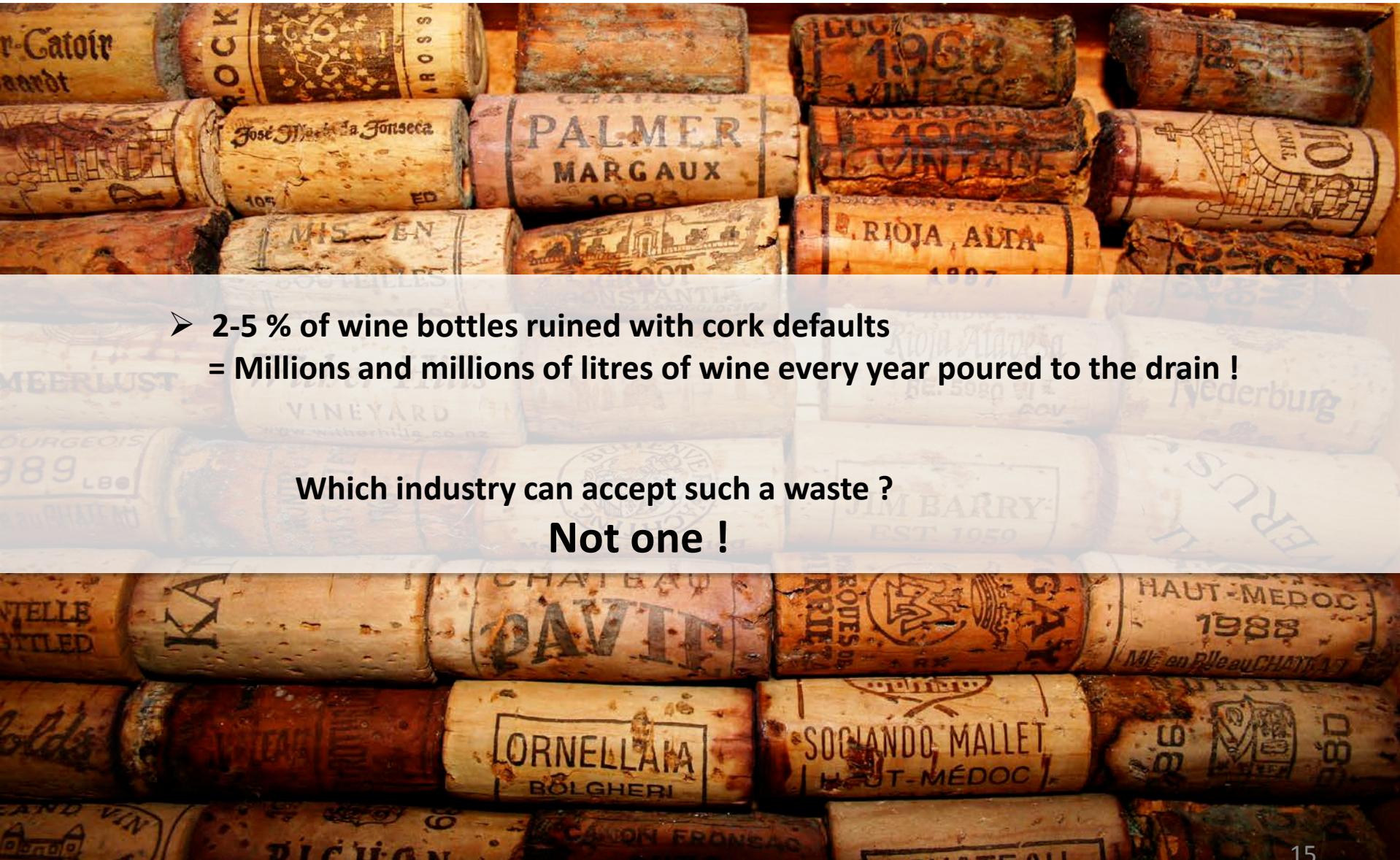
Aluminium: the trend for brand success



The conquest of the Global Wine Market **The success story of the Aluminium Closures**



How much waste?



- 2-5 % of wine bottles ruined with cork defaults
= Millions and millions of litres of wine every year poured to the drain !

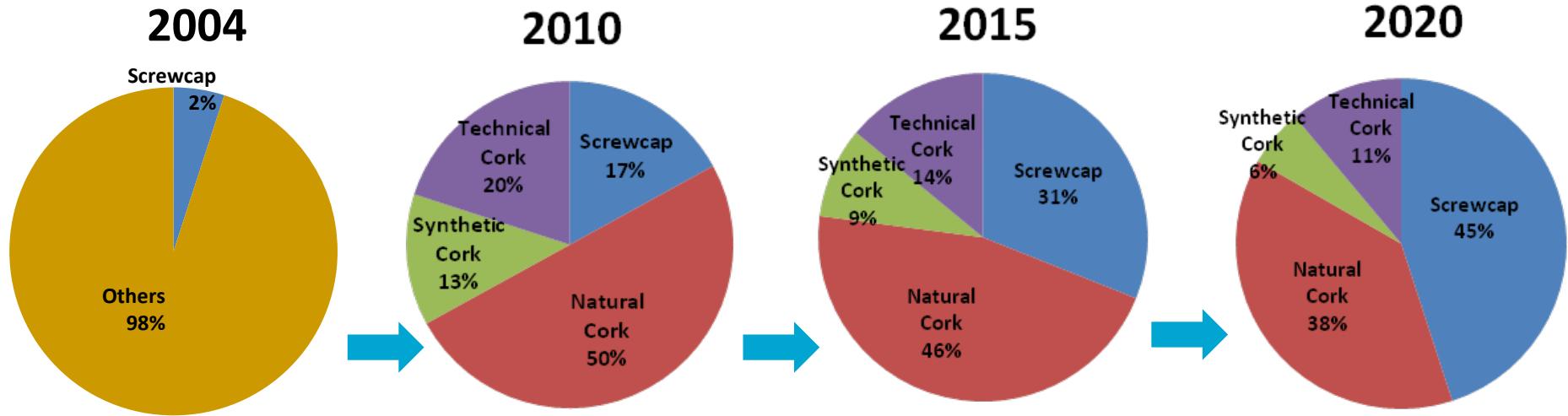
Which industry can accept such a waste ?

Not one !

A break trough innovation having changed the rules in a very conservative market



The screwcap growth projection





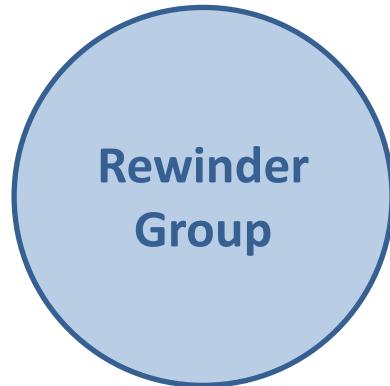
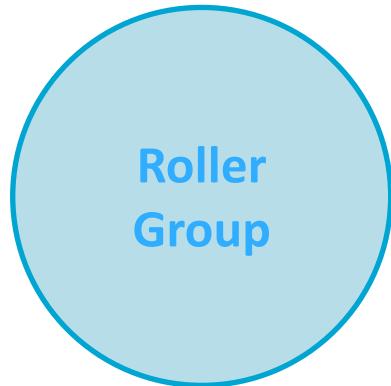
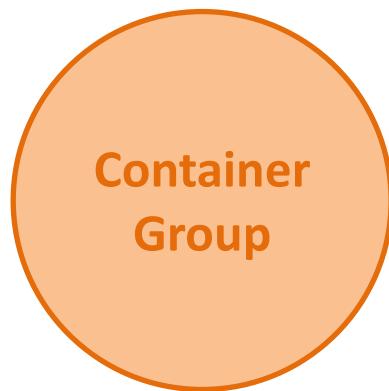
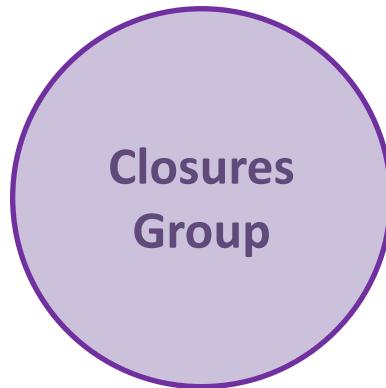
The Cork Industry counterattack campaign starts



12 million € campaign by cork industry in 2011, directly attacking alternatives closures, especially aluminium closures



European Aluminium Foil Association (EAFA)



Turn 360° campaign

'Aluminium Closures – Turn 360°' campaign to counteract cork campaign



- Life Cycle Assessment (LCA)
for scientific based facts
- Multilingual website:
www.aluminium-closures.org
- Press releases
- Direct mailing to wine makers
- Support of recycling activities
- Presentations at conferences

Recyclability program_Communication partner's campaign

cap it recycle it!

Aluminium bottle caps are 100% recyclable - please put them back on your glass bottles before recycling.

find out more:
www.councilname.gov.uk



screw it back on!

Recycle your aluminium caps by putting them back on your empty glass bottles.

Aluminium is 100% recyclable

find out more:
www.councilname.gov.uk



Improved recycling performance for aluminium closures



Average **aluminium closure recycling** rate in Europe hits **45%**

- Even though small in size, aluminium closures are widely collected and recycled – either separately with other packaging or together with glass bottles
- Recycling of aluminium needs up to 95% less energy than its primary production

Sustainability: a long-term eco-responsible strategy

Environmental

Social

Economic



Guala Closures Key results*



-12.6%

Energy consumption
(GJ/tonne PP)



-18%

Water drawn
(m³/tonne PP)



-38.1%

Waste produced
(kg/tonne PP)



-44.5%

Accident frequency
indicator



14

New patents
registered



-15.1%

Scrap



-7%

CO₂ emissions
(tonnes/tonne PP)



-27.9%

Hazardous waste
vs. total



-45.6%

Accident gravity
indicator



64%

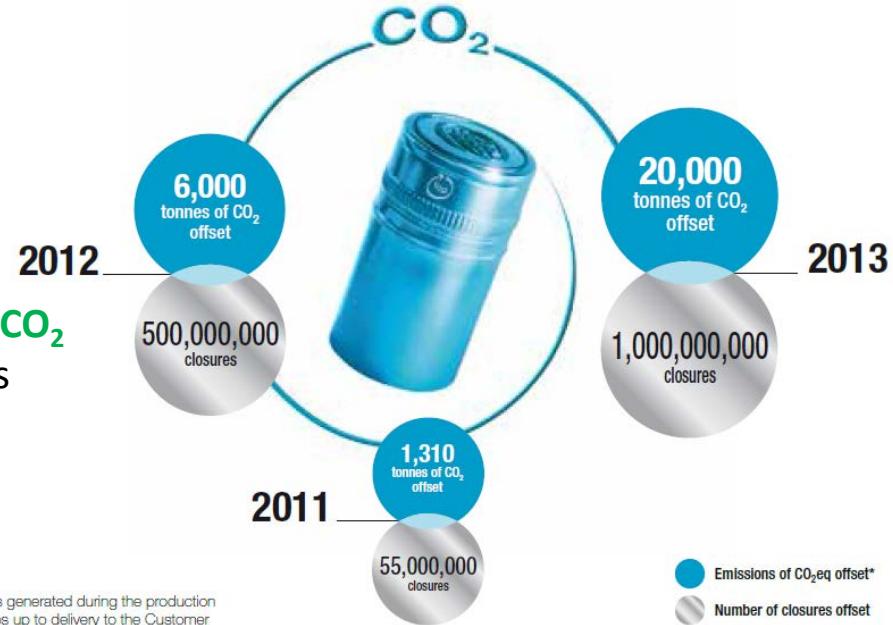
Sedex certified
sites

*Italian perimeter, with the exception of patents and Sedex (Group)
2011-2013, with the exception of CO₂ emissions (2012-2013)

Sustainability: offsetting projects

In 2011, we developed the  label, the first and only responsible label for aluminium screwcaps

Since 2011, Guala Closures **has been offsetting the CO₂ emissions** generated by the production of part of its wine screwcaps, and it achieves this through **reforestation projects**.

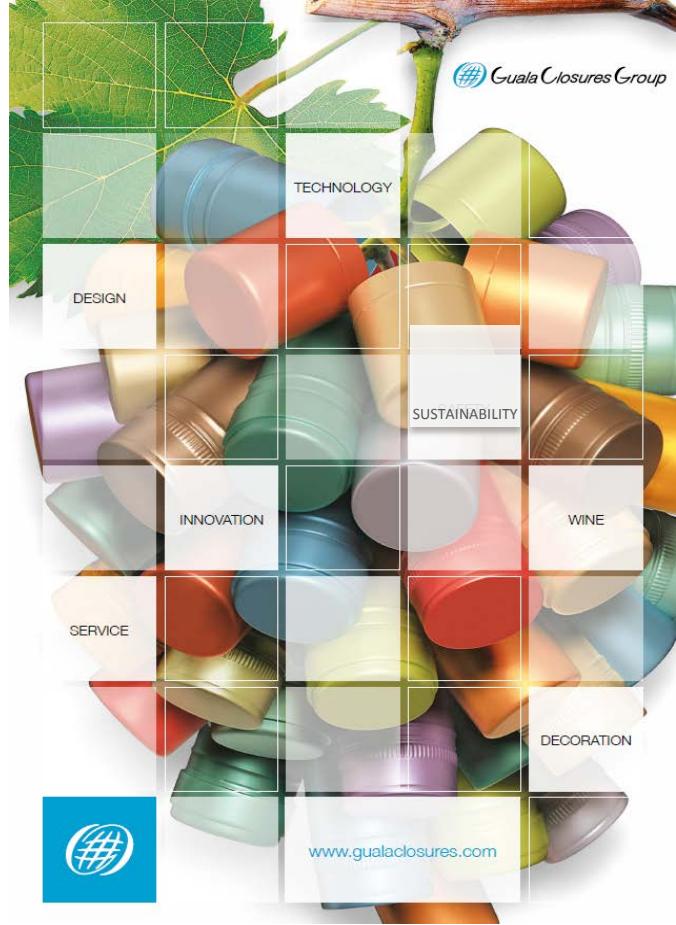


Reforestation projects

- 2011 Costa Rica
- 2012 Perù
- 2013 India



A difficult and painful path but ... what a result!



Guala Closures Group: the world's largest screwcap manufacturer



1,6 BILLION WINE CLOSURES PRODUCED IN 2013 BY GUALA CLOSURES
i.e. 35 % market share of total screwcap wine market



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Thank you!

Rome, 18 November 2014