

Market survey highlights advantages of paper sacks for cement fillers

A market research survey was commissioned by The European Paper Sack Research Group, ESG, in order to understand the key influencing and motivating factors behind cement filler preferences that may lead them to switch from paper sack solutions to plastic (ffs) sacks.

ESG is a collaboration between the two organizations CEPI Eurokraft and EUROSAC. The members of CEPI Eurokraft are the producers of Kraft and Sack Kraft Paper and the members of EUROSAC are the producers of the Paper Sacks.

About the research

Innventia AB, a Swedish research institute, conducted the market research survey.

Critically the questionnaire was designed to avoid bias by determining the key influencing factors for choice of sack system before asking respondents about the strengths of the paper or ffs plastic sack systems.

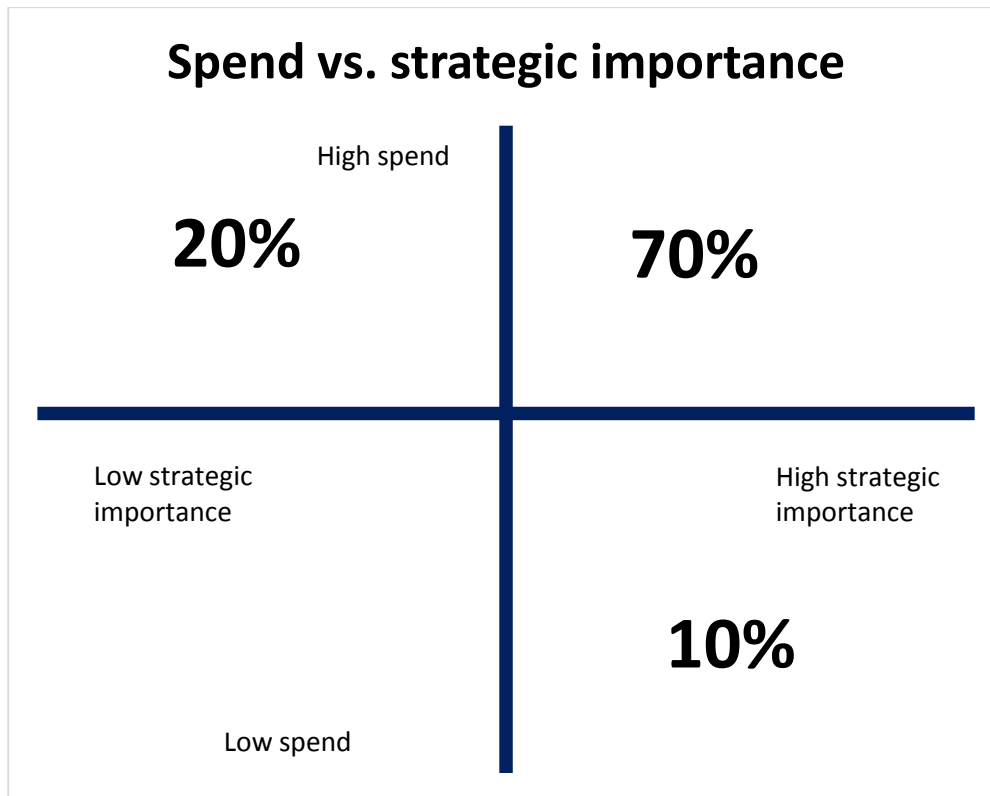
Completed questionnaires were received from fillers located throughout Europe including Belgium, France, Germany, Italy, Netherlands, Switzerland and the UK. 20 fillers, 2 retailers and one machine manufacturer were approached for their views. In total ten questionnaires were completed by fillers and informal comment was received from one retailer. The questionnaire was designed to extract quantitative responses (rankings) so that some statistical assessment of the results could be applied. For all questions involving ranking, the mean, mode and median has been calculated.

The generally strong alignment of the mean, mode and median in the study results shows consistency in the responses and therefore suggests that conclusions can be drawn from the datasets with confidence.

Paper sacks benefit from lower total cost and higher filling speed than polyethylene form fill seal sacks

The market research study revealed that paper cement sacks offer considerable cost and efficiency advantages for fillers when compared with polyethylene form-fill-seal (ffs) sacks.

Another key finding of the study was that choice of sack system is considered by the majority of fillers to be of high strategic importance and high spend. Generally companies buying products and services that account for significant spend and that are also strategically important are reluctant to switch to another supplier or system. A switch may take place but only after careful consideration or due to external influences, such as legislation, consumer or customer preferences, or taxation, over which they have little option or control.



70% of questionnaire respondents considered the choice of sack system to be of high strategic importance and high spend.

Comparable performance in the supply chain

Although polyethylene sacks are perceived as providing greater strength and moisture resistance compared to paper sacks, the survey revealed that fillers find damage, product wastage and spillage to be similar for both sack systems. This finding is particularly interesting in light of recent LCA studies promoting polyethylene sacks which suggest they have a lower environmental impact due to reduced product losses in the supply chain. This assertion does not match the experience of fillers. This finding also suggests that paper sacks are extremely fit-for-purpose and the greater strength and moisture protection offered by polyethylene is not required for the typical hazards encountered in the supply chain for cement.

Paper is seen as advantageous from an environmental perspective

The survey has also shown that environmental impact and environmental factors have limited influence over the fillers' choice of sack or sack system. Nonetheless fillers recognise the paper pack system as advantageous from an environmental perspective noting that they are manufactured from renewable materials.

Room for some improvement

There are some areas where paper sacks can improve. As well as providing greater strength and moisture resistance compared to paper sacks, the study revealed that fillers perceive polyethylene as advantageous in terms of dust and cleanliness. Solutions for strong and moisture resistant paper



sacks are already available, but along with dust and cleanliness these are important parameters for fillers and paper sack manufacturers can continue focus future innovation efforts in these areas.

About CEPI Eurokraft

CEPI Eurokraft is the European Association for Producers of Sack Kraft Paper for the Paper Sack Industry and Kraft Paper for the Packaging Industry. It has ten member companies representing a volume of almost 2,5 Million tons of paper produced in ten countries. Its mission is to promote business interests of the industry, to follow and influence packaging directives and legislation and to provide services to the members.

www.cepi-eurokraft.org

About Eurosac

Created in 1952, EUROSAC is a European Federation headquartered in Paris, rallying the European Multiwall Paper Sack Industry. The Federation embodies over 75% of the European paper sack manufacturers operating in 20 countries, collaborating as Ordinary members. Their production represents more than 5 billion paper sacks, this represents 650 000 tons of paper converted in 60 plants.

www.eurosac.org

About Innventia AB:

Innventia is a world-leading research institute that works with innovations based on forest raw materials. The majority of the operations are carried out in project form via research programmes involving many partners, such as the three-year Cluster Research Programme, or in development projects with individual customer companies. Innventia also carries out a large number of direct commissions in the form of analyses, testing and demonstrations in their lab and pilots.

www.innventia.com