

The logo for RosUpack, featuring a stylized square icon with diagonal lines to the left of the text "RosUpack".

RosUpack

27TH INTERNATIONAL EXHIBITION
FOR THE PACKAGING INDUSTRY

The logo for ExPa, featuring a stylized circular icon with a dot in the center to the left of the text "ExPa".

ExPa

EXPOSITION OF EQUIPMENT AND MATERIALS
FOR THE PULP AND PAPER INDUSTRY

6-9 ♦ 06 ♦ 2023

CROCUS EXPO, MOSCOW, RUSSIA

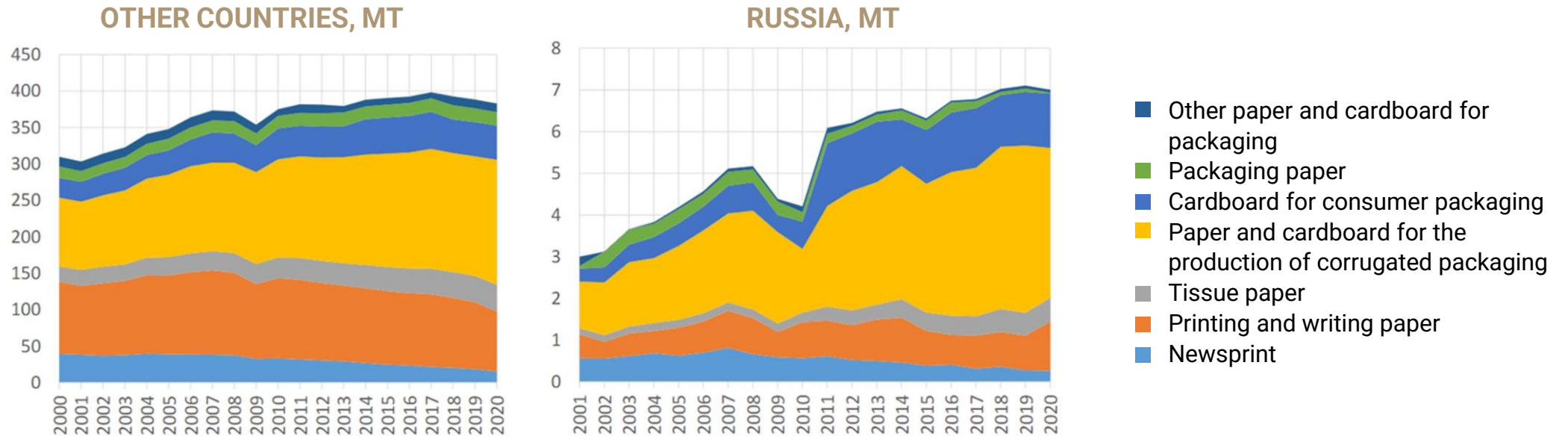
PULP, PAPER AND PACKAGING MARKET TRENDS IN RUSSIA

ROSUPACK.COM
PRINTECH-EXPO.RU



ОРГАНИЗАТОР
ORGANISER

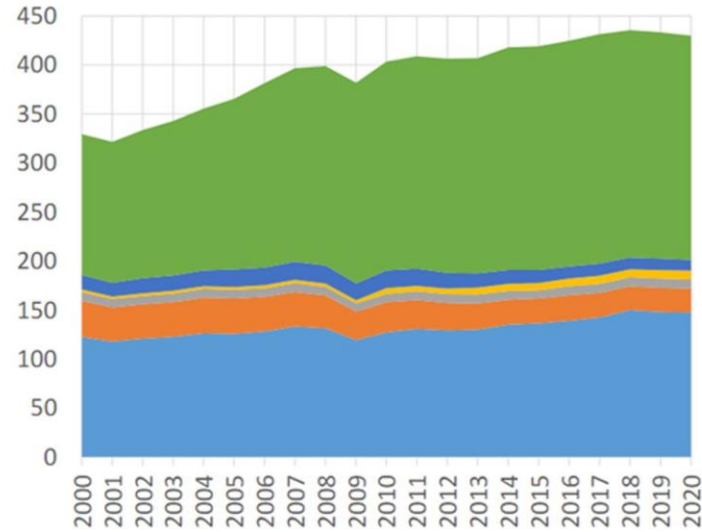
PAPER AND CARDBOARD CONSUMPTION IN RUSSIA DOUBLED IN 2 DECADES, GROWING FASTER THAN IT DID IN OTHER MARKETS



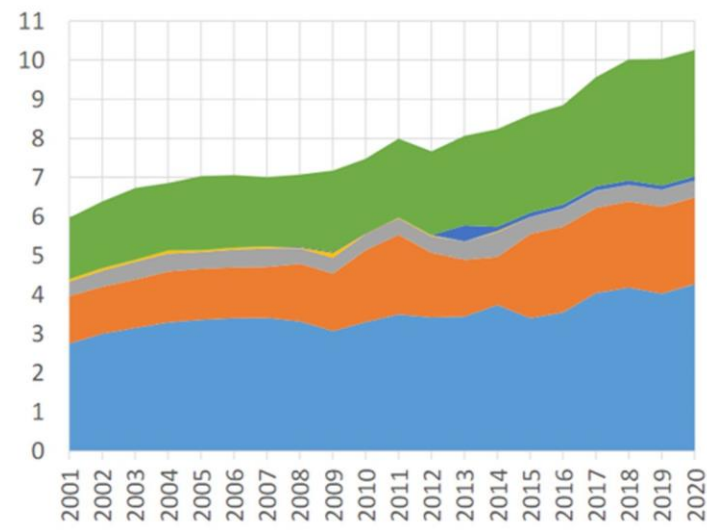
CONSUMPTION, MILLION TONS	IN OTHER COUNTRIES			IN RUSSIA		
	2001	2020	%	2001	2020	%
PAPER AND CARDBOARD	310	380	+24%	3.0	7.0	by 2.3 times
PAPER AND CARDBOARD PACKAGING	150	250	+67%	1.7	5.0	by 2.9 times
SHARE OF PACKAGING, %	48%	66%		57%	71%	

PULP CONSUMPTION IN RUSSIA HAS BEEN ALSO INCREASING FASTER COMPARED TO OTHER MARKETS

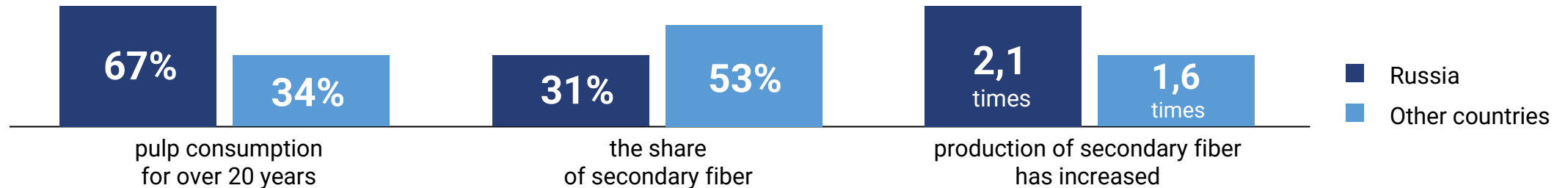
OTHER COUNTRIES, MT



RUSSIA, MT

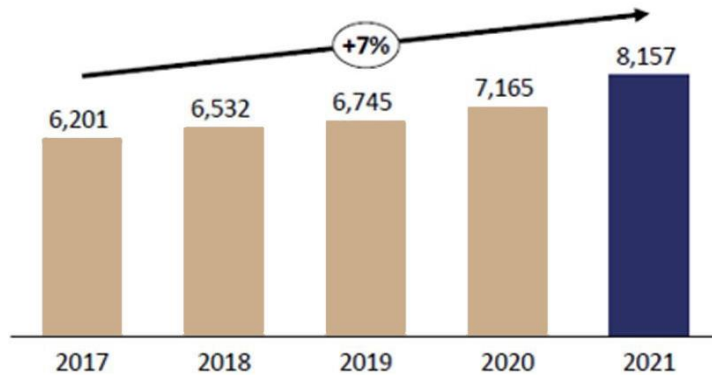


- Waste paper
- Cellulose from non-wood raw materials
- Dissolving cellulose
- Powdered cellulose
- Pulp, thermo-mechanical pulp, chemi-thermo-mechanical pulp
- Cellulose

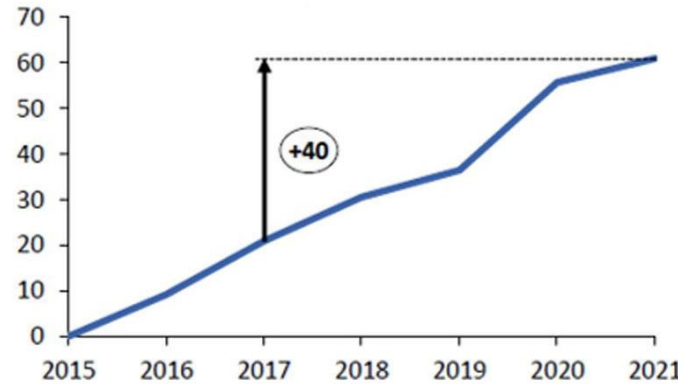


CORRUGATED PACKAGING MARKET GREW SIGNIFICANTLY IN 2021 AS A RESULT OF A PENT-UP DEMAND DURING THE PANDEMIC

PRODUCTION OF CORRUGATED PACKAGING, million sq.m

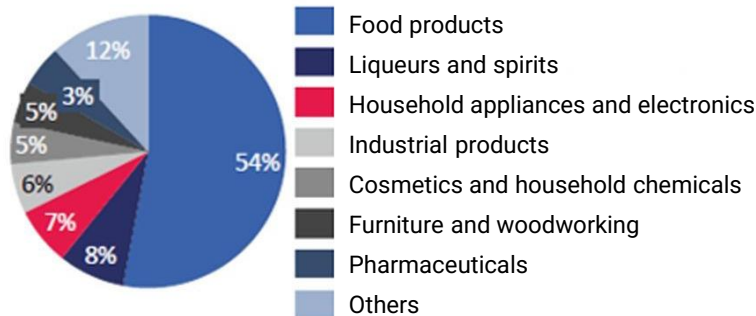


INCREASE IN THE EXPORT OF GOODS IN CORRUGATED PACKAGING AS COMPARED TO 2015 (NET), %

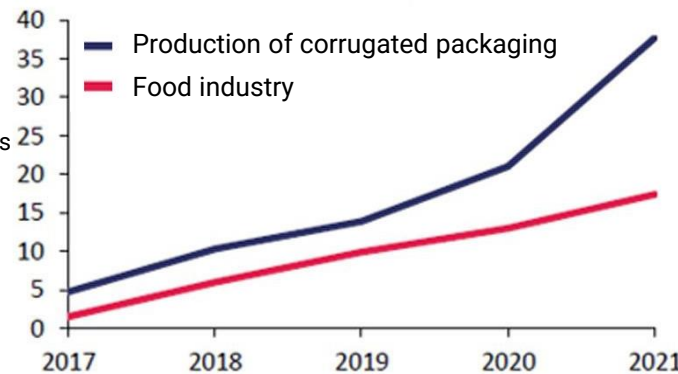


- The demand for corrugated packaging is conditioned by the domestic market development
- There is practically neither export nor import
- The demand driver is the import substitution policy amid a decline in the rouble exchange rate: the growth in production and export of goods that require corrugated packaging
- In 2020, the demand for corrugated packaging grew even stronger against the background of a new decline in the rouble
- In 2021, the market growth was associated with a pent-up demand for various goods resulting from the pandemic

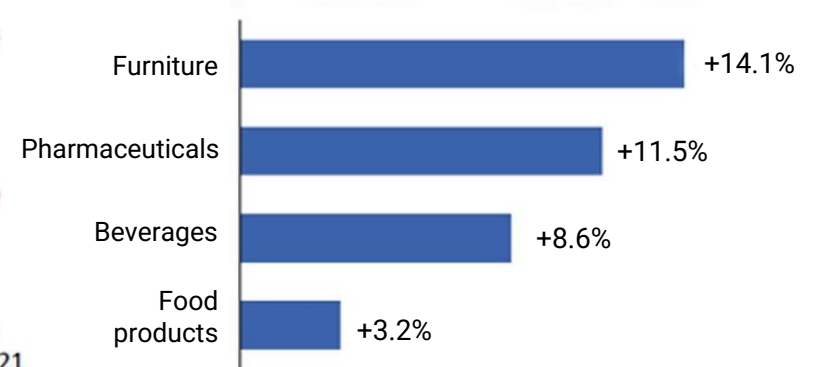
STRUCTURE OF FINAL CONSUMPTION OF CORRUGATED PACKAGING, %



PRODUCTION INCREASE BY 2016, %

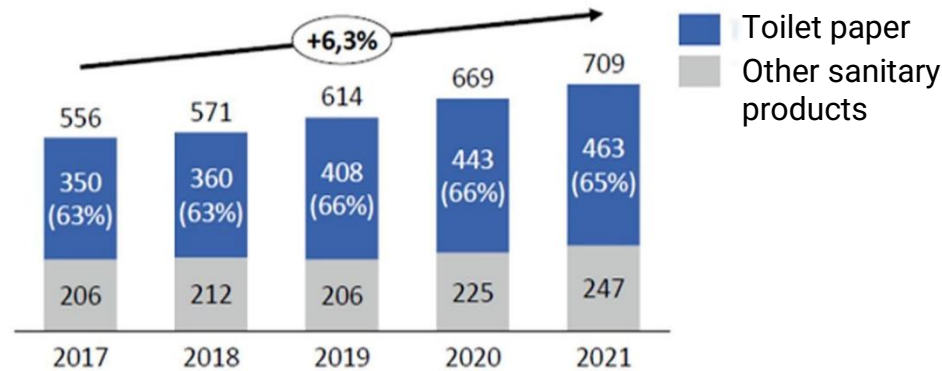


GROWTH OF INDUSTRIES CONSUMING CORRUGATED PACKAGING IN 2021

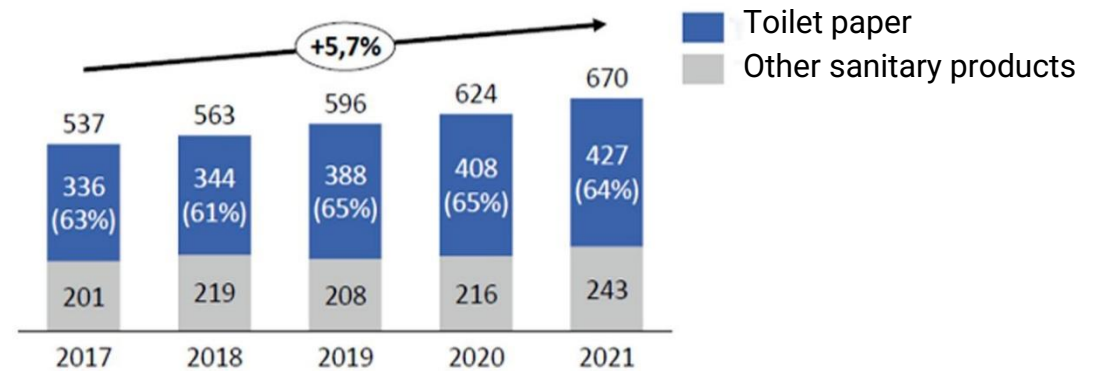


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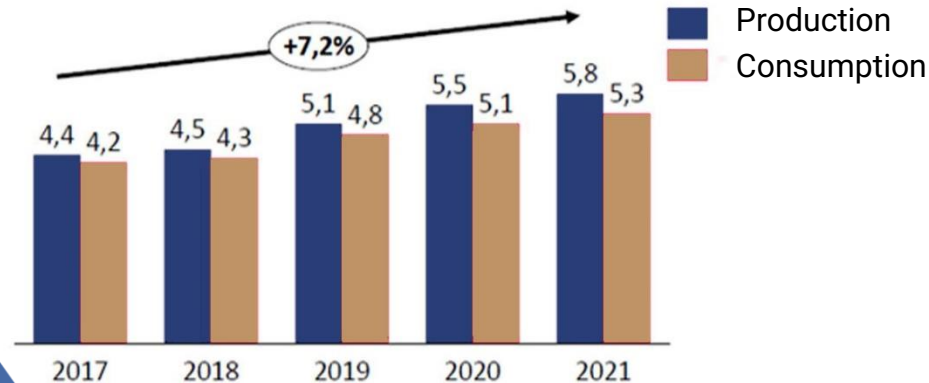
PRODUCTION OF SANITARY PRODUCTS, thousand tons



CONSUMPTION OF SANITARY PRODUCTS, thousand tons



TOILET PAPER MARKET, billion rolls



- Toilet paper is the largest segment of the sanitary products market in Russia and in the world
- An additional driver of the sanitary products market in 2020 and 2021 were restrictions due to the COVID-19 pandemic
- Market experts note that the personal consumption segment has significantly increased while the outside home segment has decreased
- The sanitary products market is characterised by a surplus of products and a partial export orientation

THE POLYMER PACKAGING MARKET OFFERS OPPORTUNITIES TO NEWCOMERS

GROWTH IN DEMAND FOR THE SMALL PACKAGING SEGMENT (UP TO 1 KG)

RAPID GROWTH OF E-COMMERCE IN THE CONSUMER GOODS SEGMENT

RAPID GROWTH OF READY-TO-EAT FOOD DELIVERY

REPLACEMENT OF GLASS AND TIN CONTAINERS WITH PLASTIC RIGID PACKAGING IN THE FOOD INDUSTRY

GROWTH IN THE COST OF PACKAGING AGAINST A BACKGROUND OF AN INCREASE IN THE COST OF RAW MATERIALS (POLYMERS) AND ITS SHORTAGE IN 2021

CONTRACTION IN DEMAND FOR PACKAGING FROM MANUFACTURING COMPANIES HAVING LOW PRODUCTION COSTS (MAINLY FOOD INDUSTRIES)

HIGHER DEPENDENCE OF THE FLEXIBLE PACKAGING SEGMENT ON IMPORTED RAW MATERIALS AND EQUIPMENT

FOREIGN SUPPLIERS LEFT RUSSIA GIVING WAY
TO ALTERNATIVE SUPPLIERS: CORRUGATORS





FOREIGN SUPPLIERS LEAVING RUSSIA: PAPER CONVERTING





FOREIGN SUPPLIERS LEAVING RUSSIA: OTHERS



REPLACEMENT OF INDUSTRIAL GOODS OF EUROPEAN SUPPLIERS WITH CHINESE ANALOGUES

Diversification of suppliers in the field of materials and equipment will help minimise production risks



OPPORTUNITIES IN SUPPLYING AIDS FOR FILM PRODUCTION

MOST COMMONLY USED PROCESSING AIDS FOR FILM PRODUCTION

- Slip agent
- UV stabilizer
- Processing additive

PROCESSING AIDS COMPONENTS

- Erucamide
- Oleamide
- Stearamide
- Fluoropolymers
- Sterically-hindered amines

NOT PRODUCED
IN RUSSIA

COLOUR PIGMENTS – PRODUCED IN RUSSIA

WHITE PIGMENT
(TITANIUM DIOXIDE) –
PRODUCED IN RUSSIA

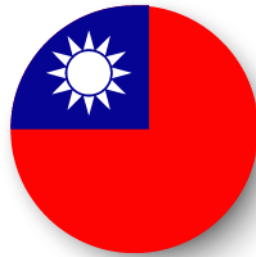
INFERIOR IN QUALITY
TO CHINESE AND
INDIAN ANALOGUES

CONCLUSION: at present, only chalk additive and a budgetary black masterbatch can be produced
SOLELY from Russian components

GREAT OPPORTUNITY FOR COMPANIES CAPABLE OF REPLACING EUROPEAN, AMERICAN AND JAPANESE EQUIPMENT



CHINA



TAIWAN



SOUTH KOREA



TURKEY



INDIA

POSSIBLE WAYS OF SALE AND SUPPLY WILL BE AN INCREASE IN THE FLOW OF GOODS WITH CHINA, AS WELL AS THE SHIPMENT OF GOODS THROUGH KAZAKHSTAN AND TURKEY



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EXHIBIT AT ROSUPACK AND EXPA!

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