



Euroopa Maaelu Arengu
Põllumajandusfond:
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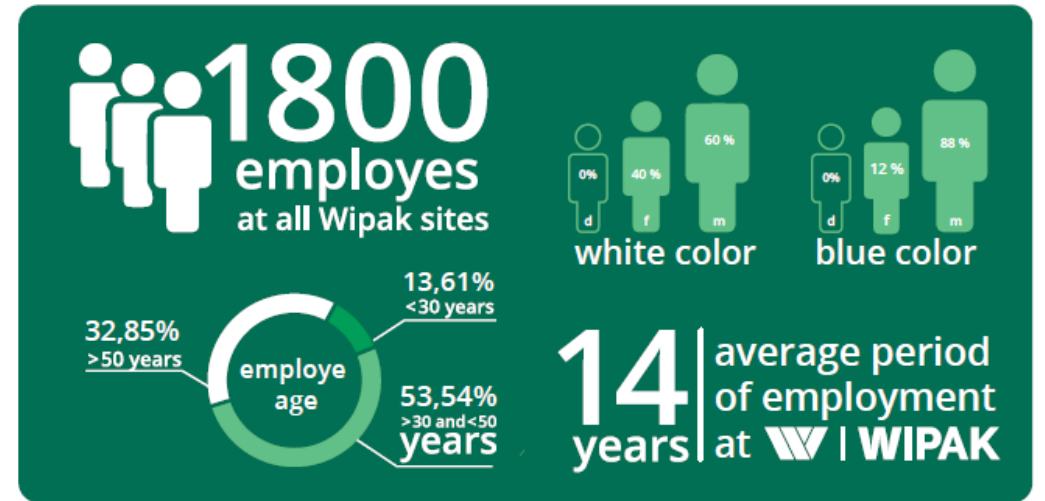
European Packaging Trends

Susan Janssen, Wipak Group



Wipak Facts

We are a leading provider of flexible packaging solutions for global markets, with a strong reputation for innovation, quality, and sustainability solutions for food products as well as medical devices and pharmaceutical products. Carrying for our employees and the consumer likewise and taking responsibility for a sustainable future.



Wipak Business Segments



Wipak has more than 50 years of experience in manufacturing, specialising in multilayer barrier films for food packaging and medical products.



Business segments

- ▶ GreenChoice by Wipak transformation: all our solutions for food products should be designed for recycling and available with a proportion of recycled and/or renewable feedstock.
- ▶ Being the ambassador for sustainable packaging in the Healthcare sector. Wiicare provides packaging solutions for Medical Device Industries (MDI), Health Care Facilities (HCF) and Pharma applications.
- ▶ Building a total global pouch business together with our business partners.



Wipak Mission & Vision



Our Mission

We enable our customers to deliver their products to people in safe and sustainable packaging.

Becoming the most sustainable flexible packaging company - we promise to reduce the company's CO₂ footprint to ZERO.



Our Vision

TRENDS

Focus :

Packaging Trends

Megatrends: Key themes for 2023



Uncertainty and Volatility

We continue to live through a period of volatility and change, in which businesses need to build greater flexibility, trust and transparency

Key drivers:

- Competition for global resources and political instability
- Climate change impact
- Economic volatility
- Transformations of tech



A Sustainable Future

Sustainable issues remain top of mind as the effects of climate change become more pronounced, with food and farming under the spotlight

Key drivers:

- Population and economic growth
- Carbon emissions
- Government policy
- Greater individual awareness



Pursuit of Health and Happiness

The global health crisis has been followed by a mental health crisis. The economic divide is becoming more evident in health, wellbeing and nutrition

Key drivers:

- More proactive approaches
- Holistic understanding
- Health investment increase
- Impact of economic divide



The Transformation Age

Technological development and adoption was accelerated by the pandemic, shaping changing lifestyles. Technological innovation is seen as a key lever to solve global issues

Key drivers:

- Push of global health crisis
- Increased collaboration
- Speed of adoption
- Need for change

Source: Innova Global Megatrends to 2025 report

Packaging Trends



"To me **product information is of major importance.** I want to know what the product contains"

"I expect companies to invest in sustainability"



2 in 5

Consumers worldwide say that when buying food, **sustainable packaging (e.g. biodegradable, recyclable, reusable)** influences their purchasing decisions the most.

60%

of the world's consumers

"are willing to swap the usual brand for a brand with more sustainable packaging".

1) Plastics Circularization

What global consumers believe or say:

- **61%** - the increased use of plastic packaging is necessary – although perhaps undesirable – since the COVID-19 pandemic for safety reasons
- **52%** - would pay more for a product if it came in recyclable packaging

Plastic isn't going anywhere.

It's inherent qualities as a lightweight, versatile and hygienic material are some of the reasons for the continuation of production and consumption increases.

Key points for industry and government:

- Design for Recycling (shift towards “mono”-material films)
- Recycling systems / infrastructure that help reestablish plastics within a circular economy
- Investment in chemical / advanced recycling (Rabobank predicts that advanced recycling plants will double to around 140 globally by 2025)
- More stringent legislation like plastic packaging taxes, mandatory recycling goals and EPR and DRS schemes are incentivizing the circular economy transition
- Recycled plastic remains expensive worldwide

Choose the statement that best describes your attitude towards plastic packaging:



"I am concerned about the increased usage of plastic packaging, but it is necessary to prevent health risks"



"I think the increased use of plastic packaging due to the COVID-19 pandemic is unnecessary"



"I am in favor of increased plastic packaging usage to prevent health risks"



"Plastic packaging has never been a great concern of mine"

Anti-plastic sentiment has cooled amid pandemic-related hygiene demands. (All infographic credits: Innova Market Insights).

Example Cases: Recyclable Solutions



2) Green but Clean

What global consumers believe or say:

- **47%** wanting to see the level of a pack's environmental impact illustrated as a score or grade
- **34%** saying that a reduced carbon footprint score positively influences their purchasing decision

Consumers want sustainability, but they don't want to be misled.
Environmental claims like "carbon impact," "reduced packaging" and "plastic-free" on F&B packaging have almost doubled (92%) since 2018.

Key points for industry and government:

- The European Commission found that more than half (53%) of the product claims it assessed in 2020 gave "vague, misleading or unfounded information about products' environmental characteristics."
- EU Commission shall adopt implementing acts to **establish a harmonized label and specifications for the labelling requirements and formats for the labelling** of packaging and the labelling of waste bins
- Honest, transparent and easy to understand communication is key (certification schemes, information and proof)



Consumer behavior is seen by many as a leading cause of plastic pollution (*All infographic credits: Innova Market Insights*).



3) Renewable Rebellion

Pollution and climate change fears and geopolitical uncertainties around the availability of oil and gas are driving the movement to renewable packaging made from paper and bioplastics.

What global consumers believe or say:

- Only **7%** perceive paper-based packaging as unsustainable
- **6%** see bioplastics as unsustainable

Food & beverage product launches that feature either a biodegradable or compostable claim have almost tripled since 2018, with categories such as tea, coffee and confectionery accounting for nearly half of these launches.

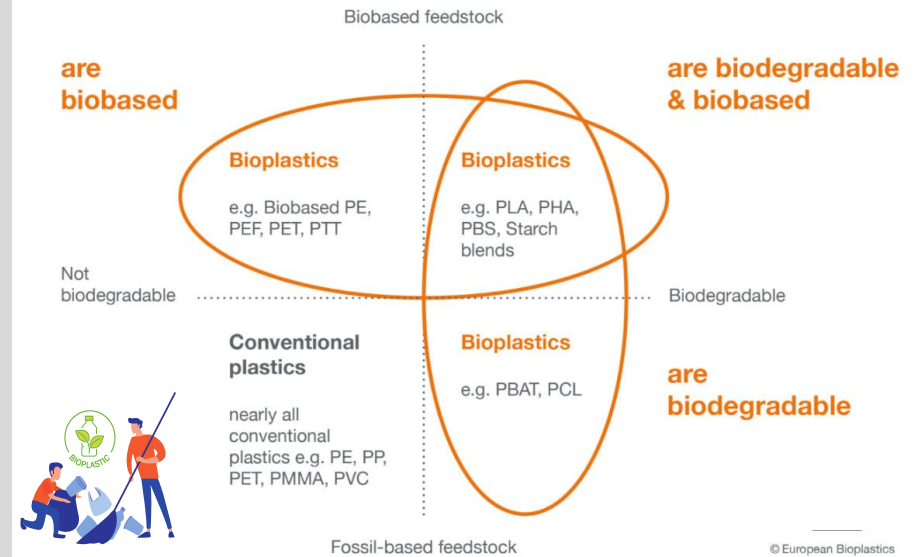
Key points from the PPWR proposal:

Certain packaging shall be compostable in industrially controlled conditions in bio-waste treatment facilities:

- Tea or coffee bags necessary to contain a tea or coffee product
- Coffee or tea systems single-serve unit
- Sticky labels attached to fruit and vegetables
- Very lightweight plastic carrier bags

Packaging other than that, including packaging made of biodegradable plastic polymers, shall allow material recycling without affecting the recyclability of other waste streams.

Global bioplastics production is expected to almost triple by 2027. In 2022, packaging remained the biggest market segment for bioplastics (48% by weight).



Example Case:

Minced Meat vacuum packaging supporting responsible sourcing through the integration of 60% bio-based material according to a mass balance approach



4) Meaningful Connections

What global consumers believe or say:

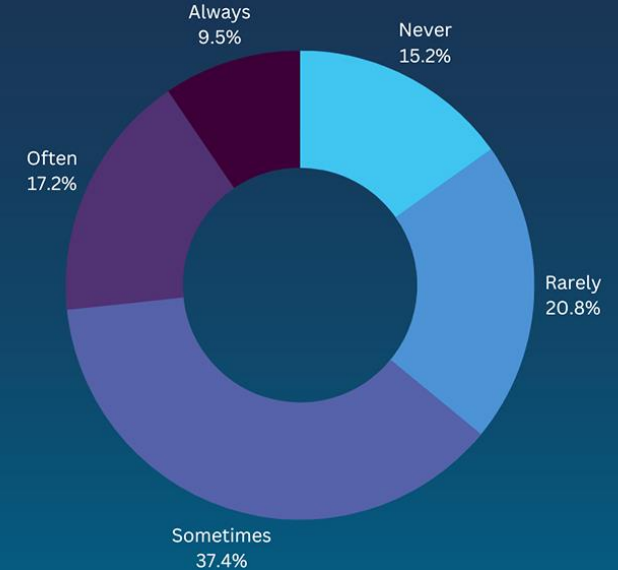
- **77%** are interested in engaging with connected packaging technologies on-pack via their smartphones.

Consumers exist in a connected world and packaging is increasingly seen as a valuable platform for digital engagement. Technologies like QR codes, AR and digital watermarks have begun to emerge in recent years as cost-effectiveness and consumer appetite grow.

Key points for industry:

- While these technologies have mainly been implemented to boost consumer-brand engagement with loyalty reward programs and big data collection for targeted marketing, they are increasingly being employed as tools to support circularity and inclusivity.
- Technologies to provide greater product transparency and facilitating farm-to-fork traceability, but also for enabling greater accessibility and inclusivity.
- Enabling of higher quality sorting at waste management facilities.
- Increasing data pools will allow for better monitoring and concrete programs

If you see products containing a connective packaging technology that provides extra product information, do you check it?



The vast majority of consumers scan connective packaging for extra production information at least some of the time. (All infographic credits: Innova Market Insights).



5) Reusable Revival

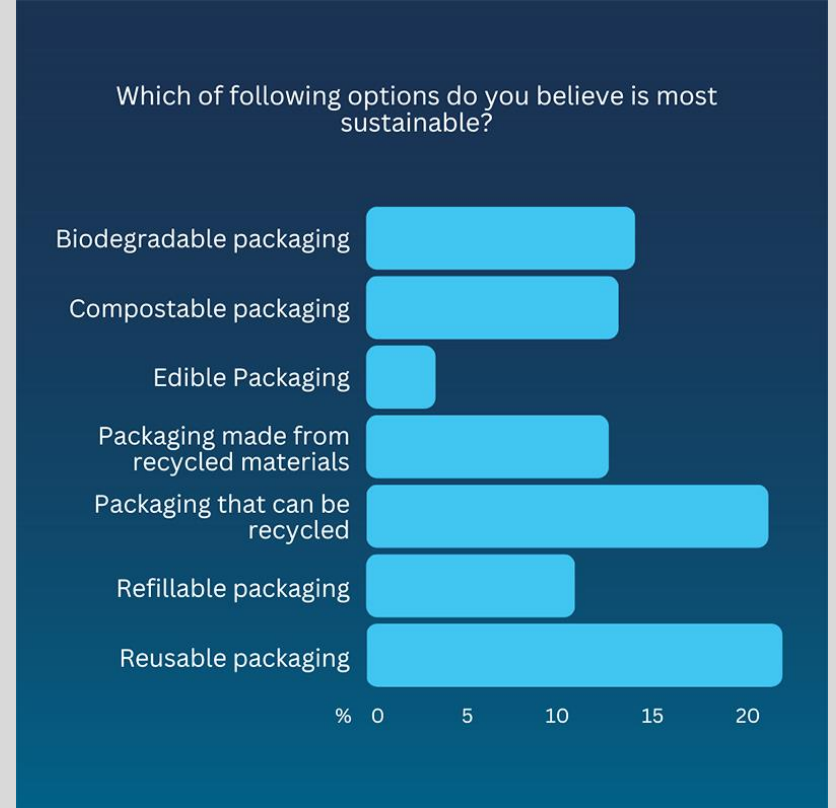
What global consumers believe or say:

- **43%** - reusability is seen as an important packaging-related purchasing influence
- **42%** - regard reuse and refill as second most relevant topic for both hygiene and shelf life

Personal care and household products have had a higher adoption of refill or reusable packaging solutions, with companies capitalizing on leveraging this trend as an avenue to achieve plastics savings.

Key points for industry and government:

- The best way to combat waste is to avoid creating it. This is the stance of major regulatory bodies like the European Commission, which envisages reusable and refillable packaging solutions as pivotal to its Green Deal circularity targets.
- Although reusable and refillable systems have been slow to take off in the F&B space amid scalability challenges, consumer belief in the long-term sustainability of such models remains strong and brands will continue to explore the viability of wider-scale rollouts.



Recyclable and reusable packaging are most commonly viewed as sustainable by consumers. (All infographic credits: Innova Market Insights).



What we can expect from Legislation



Preventing waste is the preferred option, and sending waste to landfill should be the last resort.

All packaging must be recyclable or reusable in an effective manner by 2030

Mandatory use of PCR

Stronger essential requirement measures

Packaging reduction targets – specially on single plastics use applications

Minimize complexity of packaging

**Sustainable Packaging is Key!
The Transformation has started.**



According to our values: **TOGETHER** in a **TRUSTful** partnership with our stakeholders, we **WINNOVATE** sustainable flexible packaging solutions, contributing to a **FUTURE** worth living in.



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