



NOVEMBER • 2018

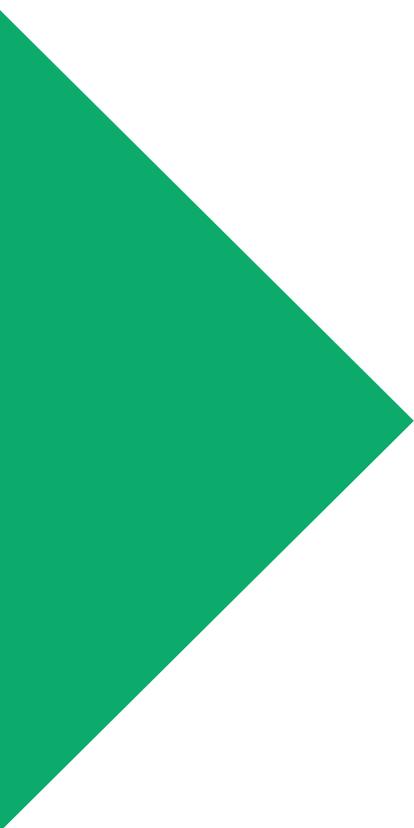
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# MARKET INSIGHTS

First Part

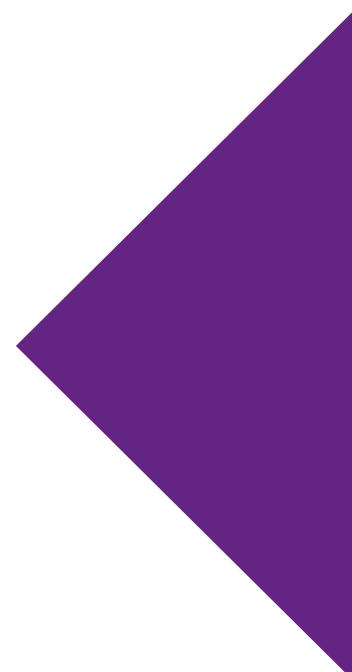
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## PACKAGING SECTOR



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# FOODPACKLAB

FoodPackLab project, funded by the European Commission COSME programme, committed to foster intersectoral cooperation to bring innovative solutions for food waste in packaging industry. FoodPackLab (Photonics – Packaging Partnership for Food Innovation) is the European Strategic Clusters Partnership launched by 5 European clusters from photonics, packaging and food industry under the ESCP4i programme.

**The European Technology Platform Food For Life, impulsed by the European Commission in order to foster R&D under the leadership of the industry, defined several key aspects in which food industry needs to focus the innovation:**

- Food processing
- Increasing hygiene and food security
- Reducing food waste
- Enhancing the information received by the consumer, especially regarding labelling

Among all the listed key aspects, both photonics and packaging have a huge potential.

# WHERE PACKAGING SECTOR ARE TODAY

We are currently living a new industrial revolution, where the whole industry is following a transformation with constant changes, where the packaging is also involved. Exploiting current businesses, coexisting at the same time with exploring new initiatives, is essential to adapt into the change, which is absolutely necessary in a highly VUCA (Volatility, Uncertainty, Complexity, Ambiguity) environment such as the current one. In this sense, innovation is crucial in order to generate shared value across the entire ecosystem, especially with consumers, which present increasingly specific and demanding demands.

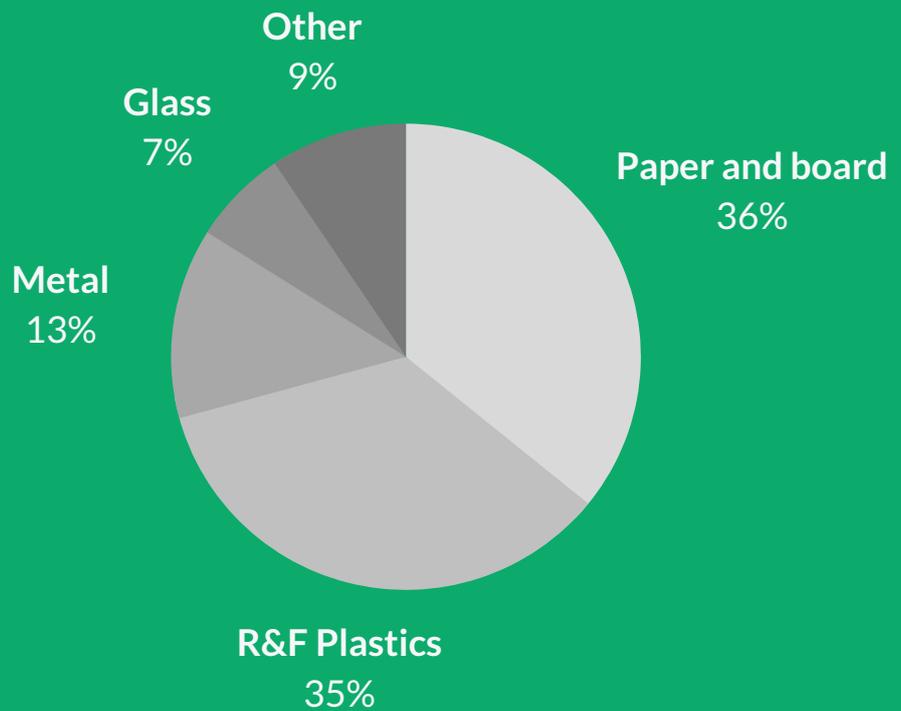
Nowadays, we are in a market where the combination of price-quality is no longer enough to choose the product and where the consumer looks for a **purchase experience**. Therefore, **giving value** to an **added value** that is useful and **differential**, is indispensable. Thus, we already see more **versatile packaging**, which **increases security** and **conveys specific concepts** such as the **taste for local things**, the **surprise**, or the **respect for the environment**. All of them are some of the demands of the new consumer, such as the Millennium and the generation Z.

Lifestyle is also changing. With increasingly busy and moving citizenship, looking for the **practicality of the products**. Thus, we find a market with already many monodosis present and smaller portions. These are also some of the trends derived from the purchasing changes made by the consumer today.

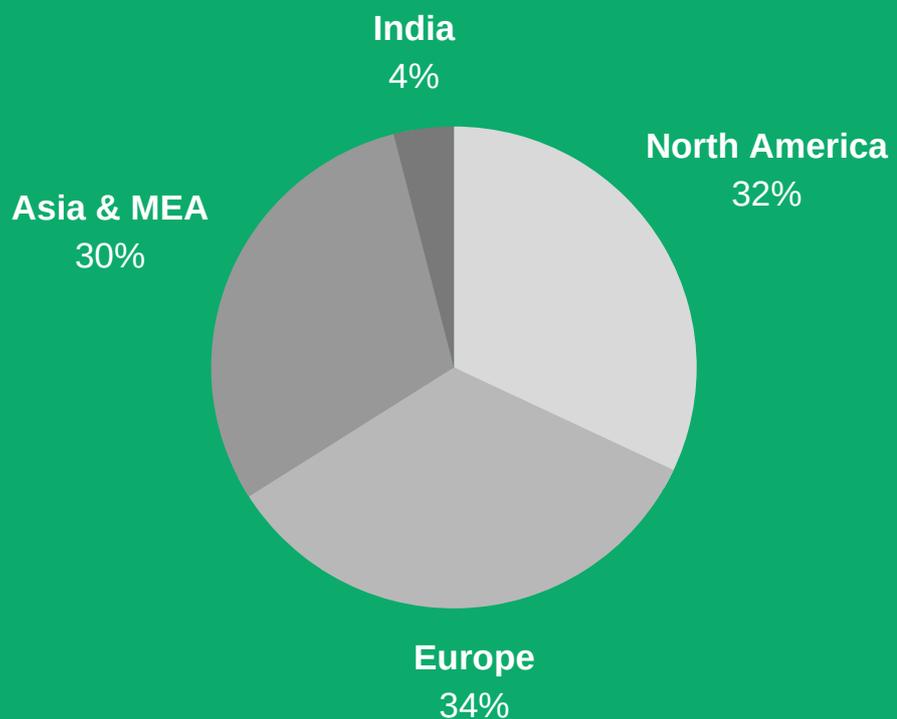
All these changes have changed the paradigm, and where the packaging has focused **technological innovation** in the **development of digital** and **3D printing**, **active packaging**, the **smart packaging**, or the **sustainable products**, among many others.

# GLOBAL PACKAGING MARKET

## Materials used in the packaging sector



## Global consumer packaging market



# GLOBAL SECTOR TRENDS

## CHANGES IN THE CONSUMER

- Seniors
- Baby & Kids
- Singles
- E-Commerce
- Sustainability

## CHANNEL CHANGES

- Appearance of new players
- Multi-Channelty implies new logistics
- Retailer trends
- Trends of online platforms
- Purchase criteria

## CHANGES IN THE BRAND OWNERS

- Business concentration
- Extension of the useful life product
- Short series
- Focus on closure systems and dispensers
- New and more sustainable materials
- Purchasing criteria
- Long-term sustainability objectives

## COMPETENCE

- Business concentration.
- Sustainability, eco-design and recyclability.
- Digital printing.
- Digitalization of the value chain
- Other innovative technologies.
- Product Service.

# GLOBAL SECTOR TRENDS

## CHANGES IN THE CONSUMER

- In the year 2014, **17%** of the population of the European Union (**85 million people**) was over **65 years old**. By 2060, **30%** of the EU population (**155 million people**) will be over **65 years old**.
- The baby / kids segment is one of the most important **innovation** drivers in **convenience** and, above all, **safety**.
- Increased consumption of **prepared food, single-product** and products that have not been packaged until now.

## TRANSVERSED TREND SUSTAINABILITY

- Increased consumer interest in sustainable products, especially in the case of millennials.
- Reduction of the volume of packaging generated, as well as redesign of the products and containers of the distribution marks.
- Setting medium / long term sustainability objectives.
- Trade-off between functionality and sustainability, for example the use of multilayer plastic packaging increases the shelf life of the products but is difficult to recycle.
- Research for the development of new materials.
- The customer demands more sustainable products but the cost differential is a brake.

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# TECHNOLOGICAL INNOVATION

**1**

## 3D PRINT

Manufacture of packaging or parts for machinery via 3D printers

**2**

## ACTIVE & INTELLIGENT PACKAGING

Packaging to increase the shelf life of products, monitor their freshness, show quality information, improve safety and convenience

**3**

## EDIBLE PACKAGING

To replace single use plastic packaging for food

**4**

## SOLUBLE PACKAGING

Water soluble packaging for decomposition in the sea

**5**

## SELF-COOLING PACKAGING

Packaging capable of heating or cooling its contents autonomously

**6**

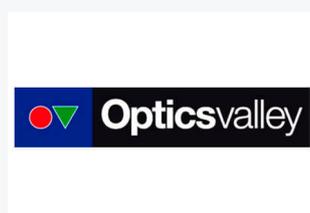
## MULTYSENSORY PACKAGING

Packaging that brings new sensations (aromatic,audible...) that the current packaging dosen't contribute

# CONSORTIUM

## 5 EUROPEAN CLUSTERS

The strength of FoodPackLab is deep specialization and knowledge of narrow certain areas in packaging technology by consortium members that is brought together in order to serve for the initial aim of the FoodPackLab actions – prevention of high levels of food waste, improvement and assurance of quality and shelf life of food



For more information visit us in:  
[www.foodpacklab.eu](http://www.foodpacklab.eu)

## SOURCE

- <https://www.smitherspira.com/resources/2016/february/global-packaging-material-outlooks>
- [http://www.poyry.com/sites/default/files/media/related\\_material/se\\_151119\\_poyry\\_nov\\_25\\_final.pdf](http://www.poyry.com/sites/default/files/media/related_material/se_151119_poyry_nov_25_final.pdf)
- <https://www.berlinpackaging.com/white-papers/consumer-megatrends-and-packaging-implications-how-companies-can-ride-consumers-coattails/>
- <http://www.accio.gencat.cat/web/.content/bancconeixement/documents/d6395812.pdf>
- <https://www.nielsen.com/us/en/press-room/2015/consumer-goods-brands-that-demonstrate-commitment-to-sustainability-outperform.html>
- <https://www.dsmith.com/packaging/expertise/our-vision/innovators/innovation-database/2015/1/e-shop-boxes>
- [https://www.elespanol.com/economia/empresas/20161110/169733548\\_0.html](https://www.elespanol.com/economia/empresas/20161110/169733548_0.html)
- <https://www.jabil.com/insights/blog-main/11-customer-trends-driving-product-innovation-and-packaging.html>



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