

FUTURE of PACKAGING

03 Packaging a trillion-dollar circle of life

The packaging industry is moving into a circular economy of materials rotating in a sustainable loop



04 Thinking outside the box to innovate

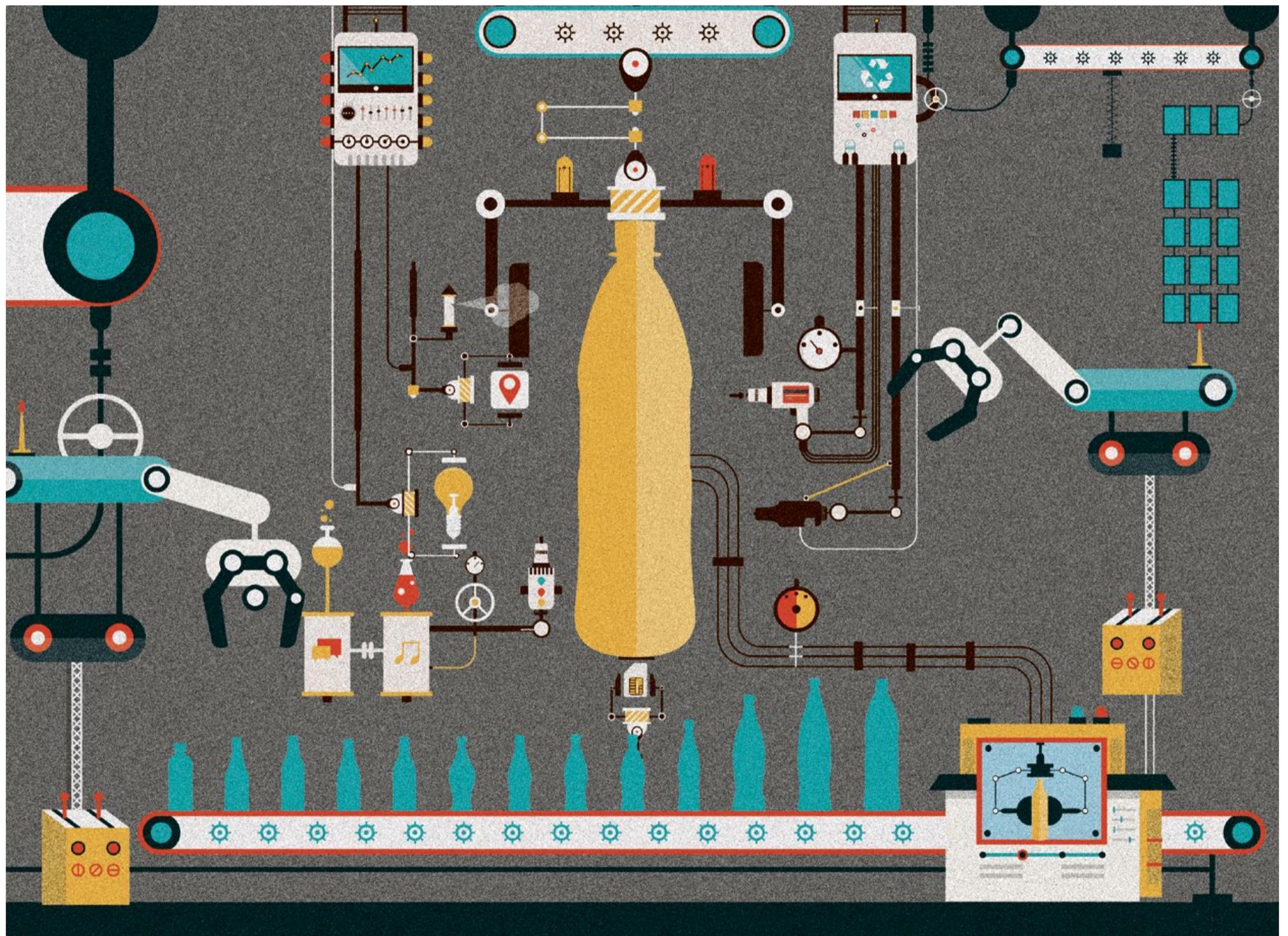
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Packaging a trillion-dollar circle of life

The packaging industry is moving into a circular economy of materials rotating in a sustainable loop of smart design, carbon-efficient manufacture, reuse and recycle

◆ OVERVIEW

● JIM McCLELLAND

Packaging is about to join the one-trillion-dollar club. That many dollar bills, laid end to end, would wrap around the world almost fourfold. However, circular economics of a different kind will help shape the industry of the future.

With global sales of \$975 billion forecast by 2018, industry numbers are up and rising. Smithers Pira research flags digital printing and bioplastics for growth, and tips brand protection to have more than doubled over a decade.

According to Nicholas Mockett, head of packaging M&A at Moorgate Capital, 2015 looks set to be a record year for mergers and acquisitions, surpassing even the 2007 sector high of \$33 billion. While unprecedented, this level of investor interest is not surprising. He says: "When you compare the public company Packaging and Containers Index with the Dow, over the last ten years, packaging shows almost twice the return. Compared with the FTSE 100, performance is almost tenfold."

Mr Mockett identifies three market segments to watch – food, pharma, and health and beauty. "In food, the burgeoning middle classes globally will drive up the value of protein, so packaging which

prolongs food life will become increasingly valuable," he says. "In pharma, that same demographic, coupled with the ageing population in the Western world, will drive demand. Finally, ageing will also drive health and beauty products, such as hair dye or anti-wrinkle cream."

This growth heralds opportunity for technological innovation, particularly involving electronics, as the rise of so-called smart packaging taps into connectivity emerging via the internet of things (IoT). It can boost productivity and protection, through tracing and tracking.

It also has client-facing benefits to offer product development, marketing and sales, says Andy Hobsbawm, founder and chief marketing officer of IoT smart products platform EVERYTHING and advisory board member of the Active & Intelligent Packaging Industry Association. "Smart packaging can drive revenue growth and capture market share by engaging consumers at point of purchase, building brand loyalty, up and cross-selling products," he says.

"Consumer insights will collect real-time data to better understand who, what, how, when and why consumers are buying. Data gathered through mobiles enables a raft of new personalised offers."

Benefits to society become

more purpose driven, though, when engagement moves beyond immediate commercial "fetch-and-pitch" models of leveraging data to sell more stuff. Entering the arena of behaviour change, smart can also be sustainable, says Mr Hobsbawm.

“Packaging companies have a critical role to play, listening to needs in terms of collection and reprocessing, ensuring design is simple for deconstruction, reuse and recycling”

"Smart packaging can turn a product into a direct digital media channel for the brand. They could deliver personalised reduce, reuse, and recycle content to consumers, to educate and inspire them to use products more sustainably," he says.

Waste remains the default sustainability

metric for packaging. Perception persists that the industry is both directly and indirectly responsible, so part of the problem. In the United States alone, for example, recyclable post-consumer packaging, worth an estimated \$11.4 billion, gets wasted every year.

The industry can evidence efficiencies and eco innovation, but given the number and mix of actants in the whole product life cycle, can packaging companies truly influence the circular economy debate?

The answer is most definitely yes, they can and they should, says Adam Read, practice director – resource efficiency and waste management, Ricardo Energy & Environment. "Packaging companies have a critical role to play, listening to needs downstream in terms of collection and reprocessing, ensuring design is simple for deconstruction, reuse and recycling," says Dr Read. "They perhaps have more influence than any downstream players, and must help drive the debate and instigate change – they must embrace this role."

There are limits though to what can be achieved in recycling through clever design and engaging communication if appropriate collection and processing infrastructure simply does not exist.

Here, the 2013 launch by the Alliance for Beverage Cartons and the Environment (ACE) UK of

the country's first dedicated beverage carton recycling facility illustrates how the packaging industry can act collectively to change the game.

ACE UK chief executive Richard Hands explains: "Having a defined domestic route for carton recycling to a UK processor, so creating a new market, has been important in changing perceptions. Since the facility opened, a further 10 per cent of UK local authorities have started collecting cartons kerbside, meaning the total has now increased to 62 per cent nationally."

As industry mindsets shift, going circular also calls for a break with the language of linear-thinking, argues sales and marketing director at DS Smith Packaging UK, Tony Foster. "We shouldn't be talking about supply chains any more – effective packaging is part of a 'supply cycle', where materials rotate around the economy in a circular loop," he says.

This supply cycle envisions packaging services in a continuous, circular resource flow from responsible sourcing and design with the end in mind, through efficient manufacture and low-carbon transport, to retail connectivity and smart messaging, then via better post-consumer collection back to the beginning again. For global packaging, this is the trillion-dollar circle of life.

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Thinking outside the box to innovate

Necessity is truly the mother of invention in the packaging industry as fresh demands spark innovation

◆ INNOVATION

● CHARLES ORTON-JONES

Packaging is a deceptive industry. Your man on the Clapham omnibus could well assume it to be all cardboard boxes and bubble wrap. Is there any innovation? To which the industry can reply: are you kidding? Packaging is a sector valued north of \$800 billion – and it rivals Silicon Valley for innovation.

One huge story right now is the revolution in medical packaging, triggered by new European Union rules. The Falsified Medicines Directive demands every pack of pharmaceuticals be given unique serial numbers, known as serialisation. Until recently the packs needed only expiration dates and batch numbers. This is a whole new ball game.

Craig Stobie, head of the life sciences team at Domino Printing Sciences, calls the EU directive “potentially the most significant technical and logistical challenge that manufacturers have faced in decades”. The deadline for compliance is 2019. Mr Stobie and his crew have been working flat out to create industry-grade serialisation processes. It’s not easy.

“At its most basic level, this has involved many manufacturers jettisoning older coding equipment simply not capable of applying a unique code to each item,” he says. “In 2011, when the directive was published, Domino Printing Sciences estimated that as much as 70 per cent of installed equipment would become obsolete in the context of serialisation.”

Packs will need to be redesigned. New inks developed. “For ink-based coding methods, such as thermal ink jet, legibility has been significantly enhanced by the development of new inks that produce clear, high-contrast and durable codes that will last for the lifetime of the product,” says Mr Stobie. “This, too, is a new requirement, since codes must now be able to be verified not just in the manufacturing plant, but right through to the point of sale or dispensing.”



1. Stacks of Tapped Birch Water drinks 2. TrakRap secondary packaging machine 3. Bag of lamb's lettuce entering Linde's MAPAX LD machine



TOP 5 TRENDS IN PACKAGING FAST-MOVING CONSUMER GOODS



Convenience features such as resealable packs, easy-opening and stand-up pouches



Smaller pack sizes for single-serving and on-the-go use



More promotional packs and brand extensions to maintain customer loyalty



More eye-catching and colourful designs to enhance brand awareness and to stand out on the shelf



Development of the mass luxury or “masstige” category of cosmetics and other consumer goods

Source: EY

The incentive for mastering serialisation is huge. The EU directive matches similar moves in Brazil, Argentina, South Korea and China, and the United States has announced its Drug Quality and Security Bill. Further, it is likely that serialisation, when proved to deter counterfeiting, will be implemented in other sectors, such as luxury goods and food.

Here’s another fast-growing technology – modified air packaging or MAP. When food and vegetables are picked, they start to deteriorate. Microbes flourish, turning ripe courgettes and carrots into a slushy, mouldy mess. Some microbes depend on oxygen. These include pseudomonas, acinetobacter and moraxella, which spoil food, giving it a bad taste and odour. The answer is to pack food with oxygen-free gases. When bacteria can’t grow, the food is preserved for much longer.

How much longer? Linde Gases, a pioneer in the field, calculates raw red meat can be extended from two to four days to between five and eight. Raw poultry can be extended by triple the normal span; sandwiches from three to ten days.

The question is which gases to use. Linde Gases advocates varying mixtures, depending on the food stuffs. Some require nitrous oxide, argon or hydrogen. Others recommend a more traditional mix of carbon dioxide, nitrogen and even some a tiny dose of oxygen (1 to 2 per cent, at most, down from 20.95 per cent in the atmosphere). Carbon dioxide is effective at inhibiting microbes, but absorbs into

the food’s liquid and fat, reducing its pH value. It can also cause changes in permeability and texture.

Dairy brands are keen to improve duration. Dale Farm, one of the UK’s major dairy co-ops, identified a major problem with its packaging. Traditional heat-shrink-wrap heat-tunnel machines, used to package yoghurts and crème fraiche for transport, generated a lot of heat. The machinery became so hot, the whole dairy was hard to work in. Not good.

The solution was heatless shrink-wrap machines made by TrakRap. This eliminated the problem completely and improved the eco-performance of the process. Without a heating bill, Dale Farm cut electricity usage for pack wrapping by 95 per cent a year. The film used by TrakRap is 100 per cent recyclable and so thin that 68 per cent less material could be used. For a major national brand such as Dale Farm, an innovation like this makes a serious contribution to its long-term prospects.

One final innovation. Birch Water is a traditional drink in Finland and a new brand has just been launched in the UK called Tapped. Birch Water is a curious beverage. It’s made from the sap of the birch tree, tapped once a fortnight. The liquid is high in manganese, zinc, iron and other minerals.

A product like this needs special packaging to impress potential customers. So the executives at Tapped asked creative agency Horse to come up with something fitting. The result is an aseptic “lamican”, made of 75 per cent wood. It gives the product a shelf life of 12 months, and Horse claim the material has 12 per cent of CO2 emissions compared with aluminium and 19 per cent that of plastic.

“Although a traditional spring-time drink in Finland and other parts of the world such as Canada, tree waters are a totally new concept to consumers in the UK,” says Ian Firth, creative partner at Horse. “Clarity of product communication was therefore paramount, so we used the packaging structure to our advantage. To help communicate provenance, the water is packaged in a cylindrical paperboard can, which we designed to resemble a real birch tree. This helps overcome some of the challenges of communicating an unusual new product, but equally distinguishes the water from other beverages.”

Will it sell? Various fashion industry magazines have called Birch Water the new “super food”. If it does take off, the packaging industry will, as usual, have played a vital role.

“Packaging is a sector valued north of \$800 billion – and it rivals Silicon Valley for innovation”

CASE STUDY: DELL



Dell is one of the world’s biggest manufacturers of laptops and PCs. It is also an enthusiastic champion of eco-friendly packaging. Oliver Campbell, Dell’s director of worldwide procurement and packaging, explains his strategy:

“We’ve been introducing new, organic materials that perform the same as their less sustainable, traditional materials. For example, by injecting mushroom spores into a mould with agri-

cultural waste materials, such as cottonseed and rice hulls, we’re actually growing cushions that serve as an organic, compostable alternative to Styrofoam for heavier server products. We also use wheat straw to produce corrugated boxes, mixing straw with recycled paper to create cardboard in a process that uses 40 per cent less energy and 90 per cent less water than traditional methods.

“Our focus for packaging reflects a lot of what we see in the natural world, as it’s a continuous cycle of use and reuse. We apply this approach to the way we handle our day-to-day operations, our product design and to production for packaging.

“We also seek out partnerships that help advance innovation. For example, we partnered

with Newlight Technologies, a startup out of southern California to produce our industry-first AirCarbon plastic packaging made from methane gases that would otherwise become part of the air. This process sequesters more carbon than it produces, pulling carbon from the air and generating a net-positive impact on the environment. It also costs less than oil-based plastics.

These partnerships help advance sustainable innovation and create a market for sustainable alternatives for our industry and beyond.

“At the end of the financial year 2015, 66 per cent of all Dell packaging by sales volume could be considered recyclable or compostable; 100 per cent of the packaging for Dell tablet shipments and 92 per cent of the packaging for notebook

shipments was recyclable or compostable. We’ve saved more than \$53 million and avoided over 31 million pounds of packaging, since 2009, by reducing the materials we use. We also set a goal to achieve 100 per cent recyclable or compostable packaging by 2020 to encourage our internal teams to seek out innovative new designs, processes and materials.

“Businesses are becoming much savvier when it comes to creating smart and sustainable supply chains, and eco-packaging is just one example of a company bringing its business process in line with its environmental principles. We’re starting to see real changes in attitudes towards packaging and we hope this is just the beginning for companies who want to go the extra mile.”



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COMMERCIAL FEATURE



*Data source: EEA & APEAL, 2012

KEY REASONS TO PARTNER WITH CROWN

Crown's primary product – the iconic can – is both the source of our identity as well as the embodiment of sustainability. Metal packaging doesn't just hold its own against other forms of packaging in terms of product protection and sustainability – it excels



MASTERING METAL

Metal packaging is a natural barrier against light and oxygen, and is also unbreakable. No other packaging format can match metal's ability to package food and beverages in a consumer friendly, attractive and convenient format while preserving them in optimum and safe conditions.

If you want to work with metal then Crown should be your partner. We are a global leader in metal packaging, supplying a wide range of markets. Crown is the largest producer of food cans and vacuum closures in the world. We are one of the big three in beverage cans, and either number one or two in every aerosol and speciality packaging market where we compete. We operate 149 manufacturing plants in 40 countries and our highly skilled team of experts support large, small, global and local customers alike. While we have global reach, we aim to service our customers with locally manufactured products.

INNOVATION

Our dedicated research and development centres in the UK and United States allow us to be an innovation pioneer across the multiple sectors that we cover to improve functionality, bring added value and enhance products. This is well recognised by our customers.

Crown's SuperEnd® beverage ends reduce metal use by 10 per cent and make beverage cans even more environmentally friendly. To date, more than 450 billion SuperEnd® beverage ends have been produced by Crown and its licensees, saving over 117,000 metric tons of aluminium, 2,000 metric tons of coatings, 900,000 metric tons of greenhouse gases and 2.35 million barrels of oil.

With Crown's 360 End®, the entire lid of the beverage can is removed, turning the metal can itself into a drinking cup and eliminating the need for separate glassware. We pioneered Easylift easy-open food ends and more recently launched the award-winning Orbit™ closure with a revolutionary design which is universally easy to open and enhances convenience for consumers of all ages.

Crown's established BICAN® aerosol technology offers consumers excellent practicality due to its ergonomic design and 360-degree operation and requires little effort to use. Viscous products can be dispensed cleanly and accurately with total evacuation – no shaking required. To improve aesthetics and promote differentiation in the promotional sector, Crown produced the first fully automated seated end tin, another example of how we bring together our knowledge and technological expertise.

BUILDING BRANDS

We have a great track record of working with new companies and brands to identify the right packaging for their product, and helping them grow. The craft beer sector illustrates our commitment. We've worked with brands, such as BrewDog, Harbour and Sly Fox, from the beginning. At the International Metal Decorators Association annual conference this summer, Crown won best of category in craft cans for its work with Mother Earth Brew Co's Honcho Hefe wheat beer. Fourteen years ago, we commenced working with startup Scottish whisky distiller Bruichladdich to develop a range of innovative metal packaging. We have grown together and now we supply almost 100 times the initial volume.

SUSTAINABILITY

Not all packaging is created equal. Many formats trumpet specific aspects of sustainability, such as recyclability or shelf life, but don't stack up when looking at the complete picture. Metal packaging doesn't have that problem. Its many intrinsic properties translate to high scores in all three dimensions of sustainability – economic, environmental and social.

Crown's environmental commitment is a fundamental part of our business philoso-

phy. We have led the way in reducing the amount of metal used in consumer packaging and we continually work to increase productivity, safety, and reduce energy and material usage. For example, today's 33cl aluminium beverage can weighs over 25 per cent less than 20 years ago.

Metal packaging is 100 per cent and infinitely recyclable, meaning it can be recycled again and again without loss of performance or integrity – Metal Recycles Forever™. In fact, the can that is recycled today can be back on shelves in as little as 60 days. Three-quarters of rigid metal packaging in Europe is currently recycled and the figure goes up every year. Our industry goal is to reach 80 per cent by 2020.

Once metal enters the material-to-material loop, in which it is recycled again and again, it will always be available for future generations. This means metal is a permanent material and can make a real contribution to closing the material loop and supporting the development of the circular economy.

EXPERIENCE AND EXPERTISE

We have the expertise to support customers at all stages of development from design inception to filling. Crown designers suggest and advise on the best match between shape, design and branding, and our technical and engineering teams develop the products before Crown's manufacturing teams deliver quality Brand-Building Packaging™.

Crown also provides technical support for our customer's filling operations. Scottish brewers BrewDog called upon our customer-technical service team to help install a new can-filling line in Aberdeen. We conducted a 360-degree review of their planned operation and provided a wide range of training for the BrewDog team. Martin Dempster, director of special ops at BrewDog, says: "Within the wider drinks industry we are a relatively small player, but Crown's technical service team tailored training and support for us, and made the whole process feel like a partnership from start to finish, in the same way it would for a global brewer. It is this bespoke treatment and its obvious passion for the

can, and the industry, that put Crown ahead of its competitors for us."

INVESTING IN THE FUTURE

We continuously invest in our people – one of Crown's strongest assets. We have a collective passion for metal packaging and our vision is that Crown should be recognised as the preferred supplier of metal packaging.

Building on a tradition of innovation, quality and service, we reach ever-greater heights as we provide diversified packaging solutions to meet our customers' needs.

We are the only company with the breadth and depth of product lines in metal, the most sustainable material available, enabling our customers worldwide to build their brands.

We are CROWN Brand-Building Packaging™ and we are creating an infinitely brighter future.

To learn more visit: www.crowncork.com

CASE STUDY



A UNIQUE PIECE OF BRITISH HISTORY

In April 2011, Crown was honoured to be commissioned by His Royal Highness The Prince of Wales to create a commemorative tin holding, as tradition requires, a slice of the wedding cake for Their Royal Highnesses The Duke and Duchess of Cambridge.

Manufactured by Crown in Mansfield, UK, the tins were presented to all guests attending the wedding and sent to many international dignitaries worldwide.

Packaging can't keep costing the Earth

Consumers and manufacturers alike are increasingly demanding sustainable packaging which meets sometimes complicated requirements

◆ SUSTAINABILITY

● MAXINE PERELLA

What will define the future of sustainable packaging? It's a question doubtless keeping brand managers awake at night. Over the years green packaging has evolved into a hugely competitive marketing tool. It doesn't just reflect on business values, it influences purchasing decisions and sets the scene for a much deeper, emotional bond – the consumer experience.

And demand is growing for greater transparency. A Forum for the Future report released last year, *Scaling Disruptive Innovation in Sustainable Packaging*, found that the vast majority of consumers feel companies should do more to



Consumers are looking for well-designed solutions which add to and enhance the product experience, including what to do at the end of life

improve industry standards. Discerning shoppers aren't just looking for more recycled content in packaging, they want to know that less energy and raw materials have been used in its creation.

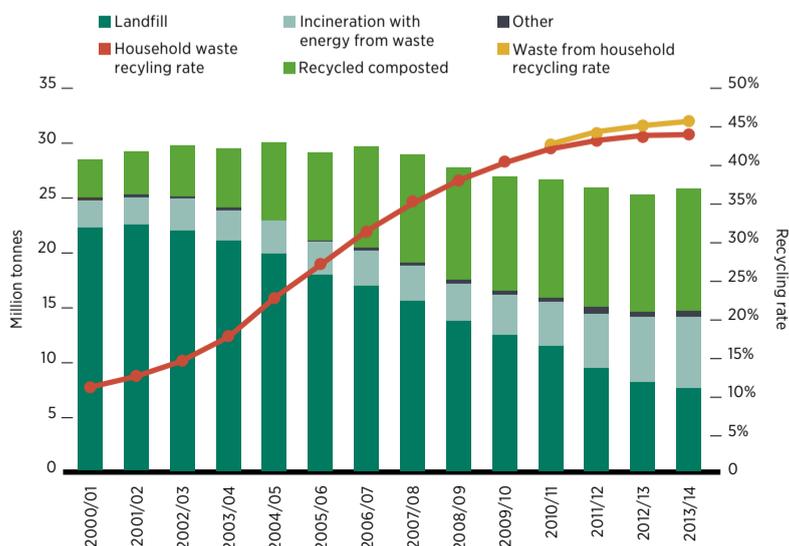
But balancing these different metrics – material optimisation, carbon, recyclability, toxicity, ergonomics, and so on – is a complex task. For instance, lightweighting



a plastic bottle can impact on its potential to re-enter the supply chain in a circular fashion, meaning it may only be fit for one life cycle. It's becoming clear that more brainstorming is needed as new corporate social responsibility agendas, such as the circular economy and net positive, start to bed down.

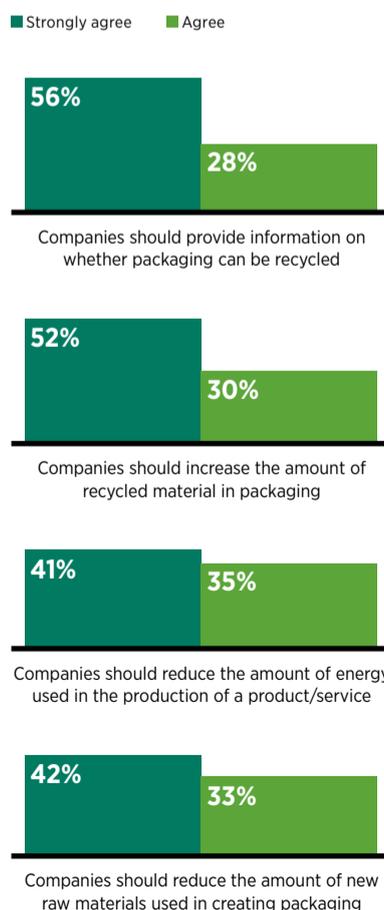
"The lighter the weight of a pack, the less value there is in the recycling process, but the higher the weight, the more resources are needed to create the pack. The balance is crucial," says Kevin Vyse, packaging innovation lead at Marks & Spencer.

LOCAL AUTHORITY MANAGED WASTE AND RECYCLING RATES IN ENGLAND, 2000-2014



Source: Department for Environment, Food and Rural Affairs 2014

CONSUMER VIEW OF INDUSTRY STANDARDS ON SUSTAINABLE PACKAGING



Source: Forum for the Future 2014

He adds that customers trust M&S to "do the right thing" – that means choosing the right packaging for the right task. "The challenge is to keep them informed as to why the packaging is used and its role – for instance, protecting from damage in the supply chain, keeping it fresher for longer, easy dispensing and reducing food waste."

This view is echoed by Dax Lovegrove, director of sustainability and innovation at home improvement group Kingfisher. "I think we need to apply different approaches for different uses. If it's for non-durable use, you might want lightweight compostable packaging that is safe for people and nature. For more durable use then you do want more substantial use of materials, built for reuse," he says.

To avoid potential conflicts, Eelco Smit, director of sustainability at Philips, says brands need to define at the design stage which level of circularity – for example, recycling, reuse or remanufacture – will apply to the packaging. "If we know the packaging will end up in a recycling system, we need to design it so it can be recycled," he says. "If we know it will be returned, we need to ensure the packaging can withstand several return cycles."

So how can packaging designers help facilitate this process? Chris Thorpe, director

at Intelligent Design Associates, believes designers are uniquely placed to balance both brand and consumer needs against each other while having one eye on the wider stakeholder context. New ideas must also be workable for materials suppliers and logistics providers. "It is part of the designer's key responsibility to adopt a critical position in such matters," he says.

But Dr Thorpe admits it's not always an easy task. "I think circular economy and the metrics, terminology and consensus around such matters are still evolving," he says. "Consumers are looking for simplicity and authenticity rather than complexity... for well-designed solutions which add to and enhance the product experience, including what to do at the end of life."

Tracy Sutton, founder of Root, which specialises in packaging innovation, shares a similar sentiment. "Much of the work I'm doing is helping brands understand the business and brand benefit of the methodology, and help them understand how to integrate the principles of the circular economy into their brand and packaging," she says.

Ms Sutton feels sustainable packaging as a whole is still very much in its infancy. "We're just starting to uncover materials that are finally better than less environmentally friendly materials," she says. "The idea that all compostable materials and recycled materials are sustainable is simply a myth. For example, there's no benefit a pack being compostable or recyclable if there is no supporting infrastructure in the local environment where it ends up."

The smart brands, she says, are now specifically requesting information about how design partners can help integrate sustainability into packaging design concepts. "This crucial progression empowers designers to consider the environment in a way that they have not been given before," says Ms Sutton.

Brands are certainly recognising the need for more inclusive dialogue. "As well as working closely with product and packaging suppliers, we recognise there are other stakeholders who need to be engaged to ensure that we have end-to-end solutions for some of the more intractable packaging problems we face," says Cathryn Higgs, food policy manager for the Co-operative Group. "We always try to look at packaging design in the round and factor in whole-product impact."

Looking ahead, packaging responsibility might reach new heights as brands such as Kingfisher, owner of B&Q and Screwfix, get to grips with net positive, which is about putting more back into society. "Net positive is an interesting concept because the idea is that we create positive impact and we don't just look at damage control. Maybe what that means is we recycle more waste than is produced by the business," says Mr Lovegrove.

In theory, he says, this could mean Kingfisher taking back packaging waste from customers or other commercial companies. "We are looking to raise our game... that means looking at what waste is out there in society which we could somehow reuse in a way that's useful to the business."



92%

of global forest, paper and packaging chief executives say it's important for their company to measure and try to reduce their environmental footprint



65%

believe resource scarcity and climate change will transform their business

Source: PwC 2014



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OPINION



COLUMN

Litter and packaging

Although packaging is not the biggest litter problem, industry leaders are campaigning to clean up Britain's streets

JANE BICKERSTAFFE
Director at INCPEN

“ Litter is not an environmental issue. It is the result of irresponsible or careless behaviour. But there is a growing trend for it to be described as an environmental problem and for policy-makers to respond by imposing restrictions or charges on some items that are sometimes littered. That would only work if all items that have the potential to be littered were targeted. That would be completely impossible.

Some people think litter and packaging are synonymous, but statistically packaging is not the largest component. However, by its nature packaging catches the eye and is remembered. It is also a bad advertisement for a company if its brand ends up in a gutter.

It is, therefore, an important issue for INCPEN (Industry Council for research on Packaging and the Environment) and its members, and while manufacturers and retailers are not responsible for it, like the majority of people, they want a clean, safe environment.

INCPEN has supported campaigns against littering for many years, has been a member and supporter of Keep Britain Tidy since the

1970s and has commissioned research to understand the issue better.

Hard evidence about litter is limited because it is not easy to measure. A count of the number of littered items typically shows that cigarette ends and chewing gum are the two most frequently littered items, together making up as much as 80 per cent, but they tend to accumulate because they are the most difficult, and expensive, to clear up.

In the most recent survey, done in 2014 by Keep Britain Tidy for INCPEN, cigarette ends were 30 per cent,

chewing gum 24 per cent, drinks containers 7 per cent, food packaging 15 per cent, tissues 1.4 per cent, supermarket carrier bags 0.2 per cent, other bags 0.5 per cent and till receipts 0.8 per cent.



There is substantial evidence that all litter needs to be tackled because litter breeds litter. Removing just some of it does not solve the problem.

The solution is a three-pronged approach – education to prevent littering, enforcement of laws, and provision of infrastructure and cleaning services to remove it.

That's why we are supporting the Neat

Streets campaign in London's Villiers Street. It is a social experiment, running for six months to test the best methods from around the world to stop littering. One of the most effective installations to date is a cigarette voting ashtray. It is a bin with two separate compartments. People choose which one to use depending on their answer to a question about sport, such as who will win the rugby world cup. Each week a new question is asked so it stays topical.

Neat Streets is supported by a wide range of organisations and companies that are also calling on government to take a lead on a national anti-litter plan which will involve all the campaign bodies, all stakeholders and tackle all litter.

A short video is being used to persuade people to bin all litter because even a little bit of litter leads to more. Litter breeds litter.

Recycling has received a huge amount of attention. Businesses have done much to support it and the UK is now among the leaders in recycling in Europe. We now need to work with others to make the UK clean and litter free. ”

SOLUTIONS FOR Better Packaging

A New Model for Collaboration

Pack Studios is the new model for collaborative development.

It provides our customers and partners in the supply chain a unique and advantageous position to leverage Dow's expertise, broad product portfolio and application testing capabilities.

As well as this, our existing and potential customers can access a global network of industry experts, to accelerate the creation and development of their next value-creating packaging solution.

Let's Make it Happen!

Visit one of our five regional innovation centers and let's talk about your next packaging project.

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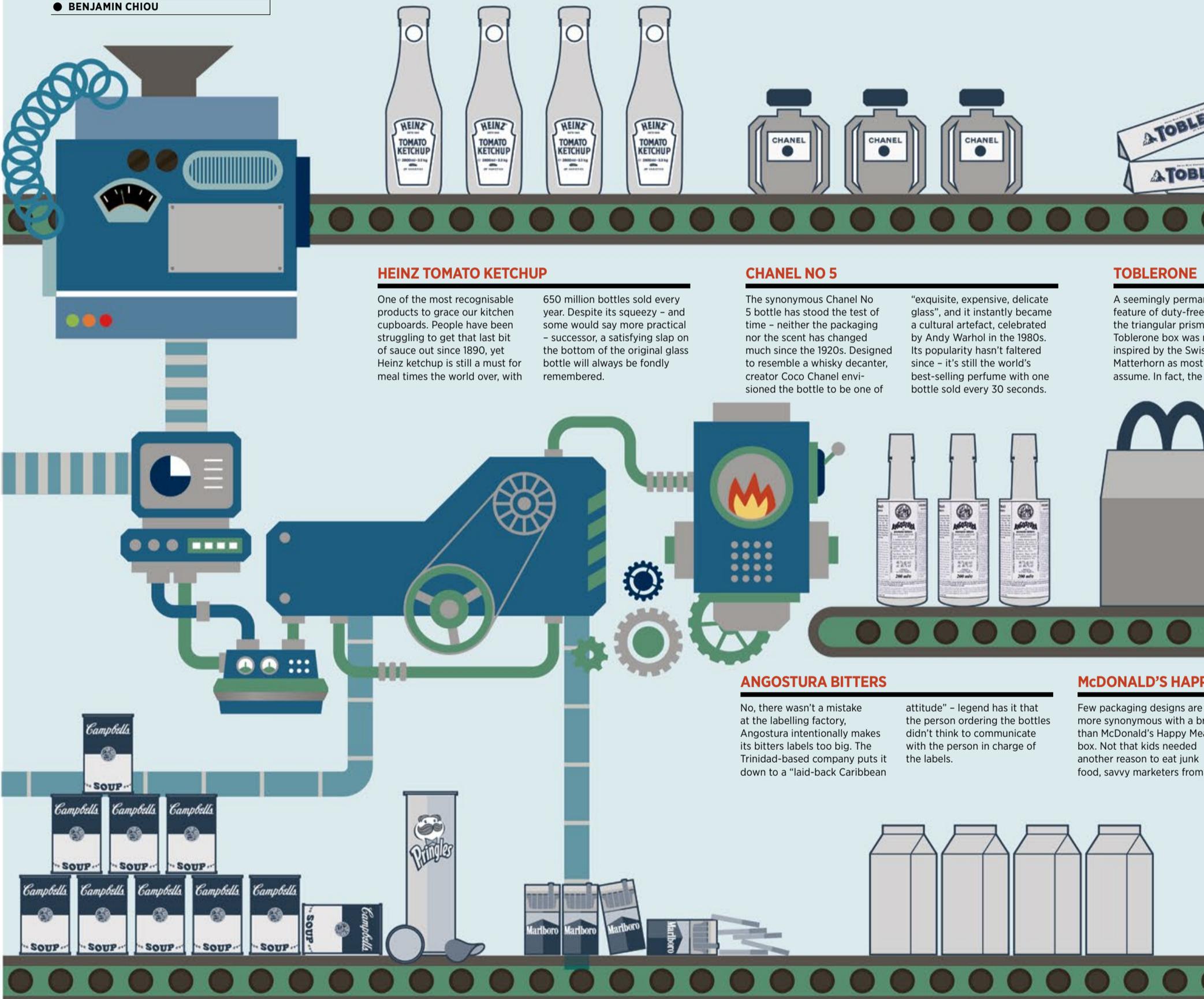


Iconic packaging - it's what i

Whether it's clever marketing or an ingenious solution for everyday problems, some product designs have become cultural icons

◆ DESIGN

● BENJAMIN CHIOU



HEINZ TOMATO KETCHUP

One of the most recognisable products to grace our kitchen cupboards. People have been struggling to get that last bit of sauce out since 1890, yet Heinz ketchup is still a must for meal times the world over, with

650 million bottles sold every year. Despite its squeeze – and some would say more practical – successor, a satisfying slap on the bottom of the original glass bottle will always be fondly remembered.

CHANEL NO 5

The synonymous Chanel No 5 bottle has stood the test of time – neither the packaging nor the scent has changed much since the 1920s. Designed to resemble a whisky decanter, creator Coco Chanel envisioned the bottle to be one of

“exquisite, expensive, delicate glass”, and it instantly became a cultural artefact, celebrated by Andy Warhol in the 1980s. Its popularity hasn't faltered since – it's still the world's best-selling perfume with one bottle sold every 30 seconds.

TOBLERONE

A seemingly permanent feature of duty-free shops, the triangular prism Toblerone box was inspired by the Swiss Matterhorn as most assume. In fact, the

ANGOSTURA BITTERS

No, there wasn't a mistake at the labelling factory, Angostura intentionally makes its bitters labels too big. The Trinidad-based company puts it down to a “laid-back Caribbean

attitude” – legend has it that the person ordering the bottles didn't think to communicate with the person in charge of the labels.

MCDONALD'S HAPPY MEAL

Few packaging designs are more synonymous with a brand than McDonald's Happy Meal box. Not that kids needed another reason to eat junk food, savvy marketers from

CAMPBELL'S SOUP

The Campbell's red-and-white condensed soup can is undeniably iconic, though its fame cannot be attributable to designers at the Campbell Soup Company. Andy Warhol turned this basic aluminium can into

an instant cultural sensation in his pop art piece in 1962, making a statement about American popular culture and consumerism, and at the same time preserving Campbell's place in packaging history.

PRINGLES

Saving the world from crushed crisps, the unmistakable Pringles tube was an ingenious solution created by designer Fred Baur in 1968 and perfectly houses a neat stack of 100 saddle-shaped Pringles, along with a resealable lid that keep your crisps fresh.

HINGED CIGARETTE PACK

The hinge-lid hard cigarette pack, created in the 1950s by Desmond Molins, was a major step forward for the tobacco industry as previous soft packs were easily damaged. Used in 1954 to relaunch the Marlboro brand, Molins PLC credits the

invention with an instantaneous 50-fold increase in sales for owner Philip Morris International, though designer Frank Gianninoto's bold red-and-white labelling redesign may have also had something to do with it.

MILK CARTON

Toymaker John Van Worman got the idea for the first “paper bottle” after smashing a glass milk bottle one morning, and took out a patent in 1915 for the Pure-Pak flat-top carton, though it took him more than

ten years to perfect a machine capable of manufacturing on a large scale. Erik Wallenberg of Tetra Pak fame was credited with using less paper and an airtight seal for his tetrahedron design in 1944.

Icons outside that counts

Icons, celebrated in packaging's hall of fame



KFC BARGAIN BUCKET

A simple yet iconic design and a classic crowd-pleaser. The Colonel sold his first KFC Bargain Bucket in the late-1950s and it has firmly secured its place on the chain's menu around the globe. Now seen as a collectors' item and available for sale on eBay, a vintage bucket could now fetch \$50.

HEART-SHAPED CHOCOLATE BOX

The novelty of a heart-shaped chocolate box means it's still a big seller on Valentine's Day and instantly recognisable. No matter who the manufacturer is, when people see a red, heart-shaped box, they know what's inside.

TIFFANY BLUE BOX

Crowned with a white satin ribbon tied at the counter, the Tiffany Blue Box, as the company says, is an "international symbol of style and sophistication". Almost as coveted as the jewellery inside, the

trademarked robin's egg blue boxes can only be obtained with a purchase from the store or by spending a tidy sum on a second-hand one from eBay or Etsy.



PIZZA MEAL

The US chain decided in the late-1970s to tempt children to eat their calorific meals with a toy - something which is still working well for the brand to this day.

COCA-COLA

Despite going through many redesigns over the years, the classic Coca-Cola "contour" bottle created in 1916 is the one we all associate with the fizzy stuff. Renowned as a cultural icon, with its fluted lines to resemble a cocoa pod, and its

distinctive, embossed script logo, the bottle definitely fits the original designer's brief to "develop a container recognisable even if broken on the ground or touched in the dark".

MARMITE

Both loved and hated, but recognised by all. Invented by German scientist Justus Von Liebig in the 19th century (before it was even called Marmite), the "food extract"

was originally supplied in a *marmite* - the French term for a crockery casserole dish notable for its pot-belly shape - which inspired the bulbous jar that we all know today.

QUALITY STREET

First produced in West Yorkshire in the 1930s, the Quality Street collection tin goes hand in hand with family gatherings and is found on many a coffee table at Christmas - cracking open a tin can bring back a nostalgic whiff of cellophane and chocolate in an instant.



PACKAGE SAVER

Carmela Vitale is not a household name, though her 1985 invention of the "package saver" is something everyone can be thankful for - the tiny plastic tripod has saved the world from squashed takeaway pizzas.

WINE BOX

Advertised as a convenient and economical alternative to bottles, bag-in-box wine is having somewhat of a renaissance. Comprised of a (unappetising) plastic bladder and air-tight

valve inside a corrugated card container, box wine keeps fresh for up to six weeks, and reduces both packaging waste and carbon emissions compared with glass bottles.

RING PULL

Credited as the reason behind a rapid surge in the soft drinks market in the 1960s, Ermal Cleon Frazee from Ohio invented the first detachable ring pull in 1962, saving consumers the need to take a "church key" or can piercer wherever they

went. It wasn't until 1975, when Daniel Cudzik was granted a patent for "stay-tabs" similar to the ones we know today, that the environmental impact of discarded pull tops was addressed.

◆ LUXURY MARKET

● SAM SHAW

How someone how much you care with just three little words – Tiffany Blue Box.

These iconic encasements have been as stalwart a dimension of the Tiffany brand as the diamonds themselves since the mid-1800s with the pale robin's egg blue influencing other luxury products craving that "halo effect" ever since.

Not only is the colour trademarked and given its own Pantone reference (1837 – to mark the year the company was founded), but the white satin ribbon and even the term "Tiffany Blue Box" have lawyers guarding their backs.

So when did luxury packaging become as coveted as the objects it contains?

"The Tiffany Blue Box is possibly the most desired and recognisable luxury packaging in the world," says Liz Walker, a freelance luxury marketing consultant.

"The value is what lies inside the box, which is why the box itself is so appealing. It is instantly recognisable as Tiffany's. Successful brands establish such key identifiers and iconic codes, adding to their brand marque."

The role of the humble carrier bag is becoming more and more important, especially for gifting brands.

Liberty operations director Atty Hussein says: "Every online customer gets a carrier bag and we stick a ribbon on the top with the assumption it is going to be a gift. Even if the customer keeps it for themselves, that is elevation for us in terms of giving every customer – whether they visit the store, go online or come into contact with a Liberty employee – a sense of pleasure."

We like the sensory aspects, unravelling the ribbons, breathing in the scented tissue paper, savouring the very tactile aspects of unwrapping. Witness women literally stroking their Dior carrier bags full of anticipation, yet with the satisfaction of knowing what's inside.

And these bags carry big business. According to specialist research consultancy Smithers Pira, global luxury packaging, while hit by the financial crisis of the past few years, reached a value in 2013 of \$13.6 billion and is forecast to grow an average of 4.4 per cent by value and 3.1 per cent by volume over the next five years.

Taking cues from the luxury car industry, mobile phone company Vertu – and much of the luxury market with it – has moved away from expense for its own sake.

Evidence of quality and longevity are paramount rather than the \$30,000 solid gold limited edition Boucheron 150, launched in 2007, enclosed in a leather-lined luxury case made from a rare type of walnut.

Jon Stanley, Vertu's head of public relations, events and sponsorship, says that approach is less relevant for the company today. The latest Signature handset rests in a sophisticated suedelined board casing, where each individual element, from the battery and headphones to the authenticity certificate, is encased separately, emanating class.

"These days the physical bits that come with the box are designed to be very tactile and have a bit of theatre, but also to be practical in terms of protecting everything that's inside," he says.

The Vertu website has a film dedicated to its "unboxing" and it's quite a ceremo-



In the wraps of luxury

Luxury brands seek to offer packaging which, for one reason or another, their customers will not wish to throw away

ny, probably befitting a mobile phone whose entry-level handset costs £4,200.

Last summer, Christian Louboutin made headlines with Rouge Louboutin, a nail polish the exact hue of the famous shoe soles, featuring an eight-inch long wand reminiscent of his highest-ever spike stiletto design, Ballerina Ultima.

The iconic nail polish comes in a "faceted, weighted glass bottle with a unique ombré effect"; the bottle itself enclosed in a black lacquered box with a red reveal.

At £36 for a nail polish, the standard range was a steal on Starlight, the limited edition launched last Christmas. With



1. Tiffany 2. Veren 3. Vertu 4. NET-A-PORTER

1,500 Strass crystals hand-applied and only 1,000 units produced, for £495 it had better give an unbeatable manicure.

Examples like this demonstrate the extent to which emotion can take over and practicalities fade into insignificance.

According to Smithers Pira, three of the driving forces causing a shift in luxury packaging are the need for personalisation – fine-tuning the customer experience, sustainability and eco-concerns – essential for brand image yet historically at odds with the idea of luxury, and the rise of e-commerce – as luxury brands increasingly adopt an online presence.

Having pioneered luxury e-commerce, NET-A-PORTER exemplifies how brands are overcoming the conundrum of maintaining the air of luxury in the face of today's increasingly digital, and therefore democratised, consumerism.

“

Witness women literally stroking their Dior carrier bags full of anticipation, yet with the satisfaction of knowing what's inside

Tapping into another main theme – sustainability – NET-A-PORTER's iconic white bags, black ribbons and subtle typography are now appealing to increasingly eco-conscious high-net-worth customers, who can opt for brown environmentally friendly packaging instead. Less visual impact, but proof that you're listening to your customers as affluence and social conscience are no longer mutually exclusive.

Giving their own eco-nod to the more iconic bottle designs, often containing premium spirits, Veren is a new entrant to the UK bottled water market.

Producing only 3,000 bottles a month globally, it is sourced from water vapour in the pristine atmosphere of a tropical island in the Florida Keys, 80 miles off the Gulf of Mexico.

"We see a lot of packaging in the market where there's no connection between why they've chosen that packaging and what the product is, such as champagne," says Veren co-founder Duane Orridge.

"We looked at things like our source being very eco-friendly, and wanted to try and mimic that character in the packaging."

Listed only in a handful of the world's finest hotels, Veren is coming soon to Harrods, where it will retail for £20.

The bottles are made from extra flint glass, screen-printed with white organic ink and their ebony caps are custom made in Italy, naturally varnished to show off the grain of the wood.

The product needs to blend in with the environment, not compete with it, says Mr Orridge, whether a sleek minimalist or extraordinarily opulent hotel.

So how much does it really influence decision-making? Do people buy the book or the cover?

"We would love to think people buy into our story, but then it's all about first impressions. Our water is mainly presented at Michelin-starred restaurants. But if you're just making a decision off a shelf in Harrods and you've never tasted it before? It's probably 80 per cent packaging," Mr Orridge concludes.



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COMMERCIAL FEATURE

THE NEW ALTERNATIVE TO AEROSOLS THAT'S BETTER FOR THE PLANET – AND CONSUMERS

A fast-growing packaging technology company has created an alternative to the traditional aerosol that's environmentally friendly and easier to use. No wonder that it's being snapped up by an increasing number of personal and homecare product manufacturers

Concerns among consumers about the damaging effects of conventional aerosol packaging on the planet are well known, and for many years manufacturers and the aerosol industry have been looking for alternatives.

Products that not only have an improved environmental impact, but also offer the consumer a better experience than the existing options, provide manufacturers with a win-win. This is one reason why an increasing number of companies, including Gillette, Elizabeth Arden and Method, are choosing the technology developed by the fast-growing packaging manufacturer called Airopack.

Other Airopack clients include DECIEM, a skincare company whose Hand Chemistry Hyaluronic Body Mist has won the Best Body Hydrator award from *Cosmopolitan* UK as part of the *Cosmopolitan* BeautyLab Awards 2015.

As the name suggests, Airopack's dispensers are powered by air. It's as simple as that. They're made of plastic instead of

metal, which also reduces their environmental impact. According to Climatop, the internationally recognised label for climate-friendly product alternatives, compared to conventional aerosol dispensers (aluminium can with bag-on-valve), Airopack's packaging solution has a 26 per cent lower carbon footprint and a total environmental footprint that is nearly a third (32 per cent) less.

As is so often the case with the best innovations, Airopack's technology is simple, but very effective. As you press the nozzle, Airopack's pressurised air technology gives you a continuous even spray right down to the last drop. Even for creams and thick gels, Airopack will dispense consistently from start to finish.

"Many consumers are unaware that up around 40 per cent of an aerosol package they've bought contains propellants and not the actual product itself," says Erwin Boes, Airopack's commercial technology director. "Consumers like the fact that with our technology they're just buying

“**Products that not only have an improved environmental impact, but also offer the consumer a better experience than the existing options, provide manufacturers with a win-win**”

the product – and they literally see this because our system is transparent.”

Another advantage for both manufacturers and consumers is that Airopack's air-powered system is airtight. "This allows for formulations to be more pure and effective with Airopack. It is also ideal for products that have a reaction to oxygen," explains Earl L. Trout, vice president global sales and marketing for Airopack. "With our technology, prod-

ucts stay fresh and they may not need any preservatives. People are increasingly looking for more natural products, and Airopack makes that easy and possible."

Consumers also appreciate the way that Airopack's patented system delivers a strong, consistent flow of product when they use it at any angle. "Airopack is especially good when people are applying body sprays and sun block, among others," explains Mr Boes. "Even when used upside-down, Airopack will work the same way and empty the package."

Airopack officially launched in 2012 – a fact that makes its take-up by some of the world's largest and best-known beauty, skincare and homecare manufacturers all the more impressive. "Our success is due to our innovative Airopack dispenser, our growing global presence and a team of experienced packaging leaders," says Quint Kelders, chief executive and founder. "Across Airopack, we are focused on delivering solutions that meet and exceed our customers' needs."

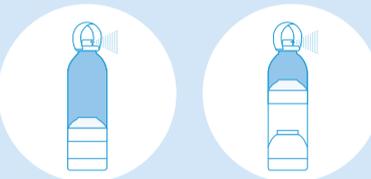
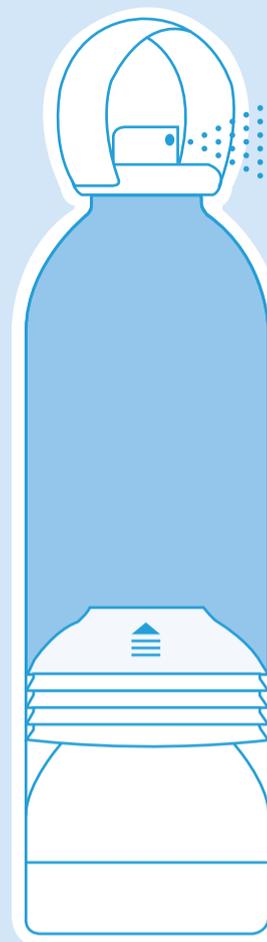
Based in the Netherlands, Airopack employs about 75 people and has sales mainly in the UK, Europe and the US, although it is attracting growing interest further afield. It also has a strong heritage of technology and innovation. Mr Kelders has been a key packaging innovator and entrepreneur since 1986.

To support the market better, Airopack has also established Airopack Labs for complete formulation development, Airopack Full Service to deliver turnkey finished products for brands, and Airopack's Authorised Filler Network to provide localised support in the United States, Europe and Brazil.

With a technology that is good for the environment and good for consumers, Airopack is set to change the way millions of us use personal and household products – and to change it for the better.

www.airopack.com

AIROPACK ADVANTAGES OVER AEROSOL



POWERED BY AIR
Uses pressurised air to push the product out instead of chemical propellants

CONSISTENT DISPENSING
Continuous, even spray or dispensing from the start down to the last drop

PURE PRODUCT
Airtight product chamber so all you spray or dispense is only the product

COMPLETE RESTITUTION
Patented system fully pushes the product out for your use

ALSO UPSIDE-DOWN
Works at every angle with the same, consistent performance

AT THE CUTTING EDGE



When it comes to prepping hair for a haircut, FUEL Cutting Mist is more reliable than water which might contain hard mineral deposits and interfere with the cutting process.

Thanks to FUEL's partnership with Airopack, their Cutting Mist eco-friendly packaging allows for a continuous 360-degree spray that alleviates repetitive pumping of water-filled spray bottles hairdressers generally use. The result is less stress on hands and wrists, and no chemical propellants in the salon.

The two-toned transparent packaging immediately notifies the user that this is no ordinary aerosol spray. Powered by air instead of the chemical propellants of typical aerosols, Airopack's clear packaging delivers a continuous mist application, while allowing the user to see exactly how much product is left in the bottle.

"At FUEL, we partner with companies that share our vision of improving and enhancing the day-to-day experiences of countless stylists who are behind the chair every day," says Richard Strom, co-founder and vice president of marketing. "Airopack's innovative packaging and formulation expertise are perfect combinations to support our 'styling made simple' approach."

www.fuelhair.com



Airopack® Sprayers and Dispensers



Gillette® Fusion® ProGlide® Sensitive Shaving Gel



Hand Chemistry Hyaluronic Body Mist



26% lower carbon footprint with Airopack



32% lower total environmental footprint

Battling to stand

Making a product stand out on the shelf is about creative marketing, sometimes cutting-edge technology

◆ MARKETING

● DAVID BENADY

Brand packaging is getting personal. Coca-Cola's cans and bottles featuring common first names are part of a growing trend. Scottish soft drink brand Irn-Bru decided to spoof Coke's personal touch and create bottle labels featuring 56 different Scottish tartan designs, one for each major clan, plus one for the Irn-Bru design. Scottish fans of the drink could seek out bottles bearing the tartan design corresponding to their clan name, whether Gordon, MacDonald or Campbell.

But this kind of mass personalised packaging has its challenges. As Andy Knowles, co-founder of design company



Digital technology is opening up a wide range of creative innovations and boosting the opportunities for playful, personalised packaging

JKR which created the strategy, explains: “You have 50-odd designs, though you don't want people to always find their own clan tartan straightaway, but within a reasonable number of store visits so they become a bit of a collector's item. So you need to find a way to distribute a random mix of the samples.”

However, the obvious solution of sorting the bottles by hand into random batches in the warehouse then shipping them out to stores was far too expensive and time consuming. But thanks to digital printing techniques, an algorithm was created to produce a reel of labels with a random sequence of designs.

“You put the reel on the filler head and each bottle is filled and labelled as

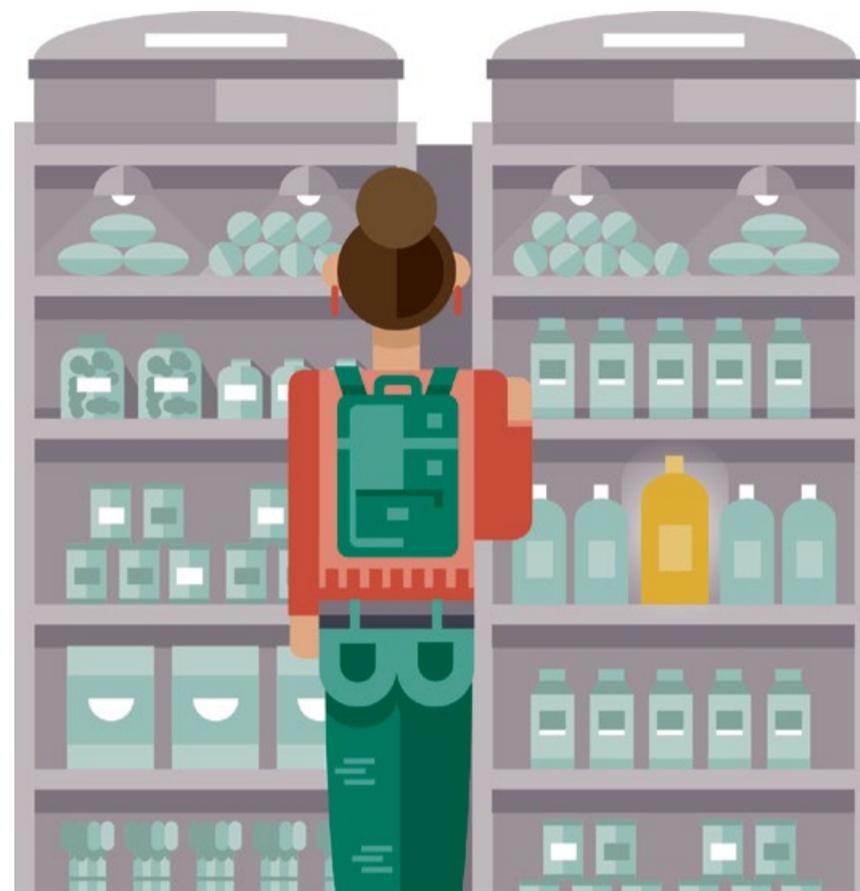
normal, but the designs are automatically varied as the bottles come off the line,” says Mr Knowles.

This shows how digital technology is opening up a wide range of creative innovations and boosting the opportunities for playful, personalised packaging that gives brands powerful new ways to engage with shoppers. “Without digital printing, we couldn't have done that,” adds Mr Knowles. “The computer is revolutionising packaging.”

Pressure is mounting on grocery brands as cut-throat competition between supermarkets forces prices down, putting a squeeze on marketing costs. Meanwhile, TV advertising is becoming prohibitively expensive. So strong

packaging designs are becoming vital as a cost-effective way of giving brands stand-out on the shelf and differentiating them from rivals. But the packs are having to work hard; they not only have to feature clear, iconic designs and logos that stand out, they must contain information about ingredients, health, sustainability and provenance, as well as telling the brand story.

Mass customisation is a way of telling that story and making a direct impact with consumers. However, digital printing technology can be expensive to implement, giving an advantage to the biggest brands that can afford to forge ahead with mass customisation. Nestlé has created a limited edition run replacing the



LUXURY PACKAGING
MANUFACTURER OF THE YEAR
2015

THE
LUXURY
PACKAGING
AWARDS

“

A great company with great service and a wide variety of well executed packaging solutions...

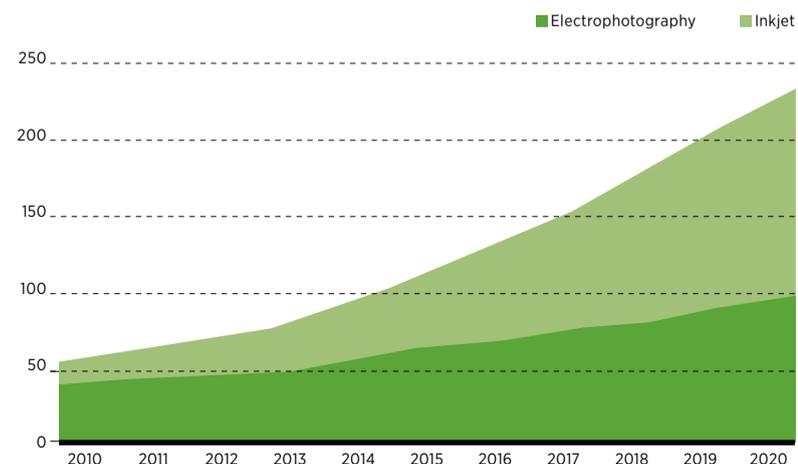
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GLOBAL DIGITAL PACKAGING AND LABEL MARKET A4 BILLION PRINTS OR EQUIVALENT



Source: Smithers Pira 2015



Irn-Bru's stand-out labels

out on the shelf

using personalisation or mass customisation techniques, and often enlisting



KitKat name on its packaging with the words “YouTube Break” and other phrases such as “Me Time” and “Sporty Break”.

Meanwhile French supermarket chain Intermarché has taken digital printing even further with its own-label orange juice packaging. The juice is freshly squeezed and bottled in-store and the digitally printed labels allow the stores to brand each bottle with the exact time the juice was squeezed, highlighting its freshness – “8.36” or “8.37” and so on. Stephen Bell, executive creative director at design agency Coley Porter Bell, says: “I’m sure we’ll see more of this immediate, on-site customisation from brands in the future.”

One of the most remarkable uses of mass customisation has been by Bud Light in the United States, which has created 200,000 beer cans for a music festival this summer, each can with its own unique design, so no two look exactly the same. The brand used digital print technology from HP and transformed 31 designs into 31 million possible graphics.

The twin pressures to cut costs and become more sustainable are creating a move to lightweight packaging, making goods cheaper to transport and reducing the carbon footprint. Mr Bell notes that some food brands are moving out of glass packaging and using low-weight pouches instead. This was pioneered by baby food brands and is now being widely used by brands such as Loyd Grossman cooking sauces. Mr Bell says that pouches also give a larger design area covering the whole pack, rather than just a label on a glass jar. This opens up more possibilities for strong design.

CASE STUDY: LUXURY OF INNOVATION



Innovations in packaging design tend to be slow burn. To find out how mass-market products might look in five years’ time, it is worth examining developments in the high-end luxury sector. Duty free retail is often a testing ground for the latest fancy packaging techniques.

Bombay Sapphire gin has created a limited-edition box pack for duty free that lights up when it is picked up. People tend to pass quickly through duty free stores, so finding a way to make the packaging stand out is vital.

The Bombay Sapphire box features an illustration created in luminescent ink. When the box is lifted up, a current is switched on and flows along different pathways of the design creating a waterfall effect. Such an approach could be used in limited-edition packaging by brands for special occasions such as Christmas.

But some are sceptical about how far the latest technology can be used on product packaging. One area of experimentation is Quick Response or QR codes, which allow users to point their smartphone at a graphic on the packing, then open up a relevant website or app on the phone. Nestlé has started putting QR codes on its products. Codes on KitKat packs link to a website with information on raw materials, manufacturing and distribution of the product.

But Heinz was recently forced to apologise after a QR code on one of its tomato ketchup bottles linked to a porn website.

Meanwhile, developments in the internet of things (IoT), where micro-chips are embedded in objects to connect them to the internet, look set to transform the role of packaging. Drinks manufacturer Diageo has used IoT technology, placing a chip on a whisky bottle that alerts the manufacturer when it has been opened. A message can then be sent to the owner’s mobile phone with serving suggestions.

The drinks giant also created a campaign in Brazil for Father’s Day using internet-connected whisky bottles. Diageo encouraged people to buy a bottle of whisky for their fathers and to create a personalised film message on their mobiles. The dads could activate the message and watch it on their smartphones via a unique QR code on the bottle.

The days when such revolutionary technology is widely used in mass-market packaging may not be too far away.

However, some brands are holding back from exiting glass as it has strong associations of quality and is easily recyclable.

There is also a trend towards creating concentrated versions of products such as detergents, leading to smaller packs and less waste. However, the smaller size also lessens the impact of the pack on supermarket shelves. To overcome this, some manufacturers are using shrink-

wrap technology on detergent bottles to create a bigger design canvas. Unilever’s fabric conditioner Comfort took this route for the launch of an ultra-concentrated variant this spring, using a shrink-wrap procedure that overcomes the problem of distortion when putting the wrap on a three dimensional product.

Perhaps the biggest trend in pack branding over the past decade has been the quest to make products look authentic and honest as shoppers become suspicious of brands from faceless corporations. Innocent Drinks is a front runner in authenticity with its Smoothie packaging, which makes great use of witty copy and endearing graphics. Many have tried to echo their approach. Adrian Goldthorpe, managing partner at designers Lothar Böhme London, says there is a trend for what he calls “faux-thentic” packaging design, which gives the appearance of authenticity. He cites Bulleit Bourbon, which was launched in 1987 based on a recipe of the founder’s ancestor first made in 1830. “So many brands are playing that game on shelf, trying to create craft, heritage and quality values, that it is almost becoming fake.” But he says consumers are willing to play along with this. “Consumers are quite happy to be fooled because they buy into the stories. If there is a bit of a story, they are willing to accept it,” says Mr Goldthorpe.

Maybe you shouldn’t judge a book by looking its cover, but the role of packaging is to tell a compelling story about the intentions and values of the brand inside.

“Perhaps the biggest trend in pack branding over the past decade has been the quest to make products look authentic and honest”

wrap technology on detergent bottles to create a bigger design canvas. Unilever’s fabric conditioner Comfort took this route for the launch of an ultra-concentrated variant this spring, using a shrink-wrap procedure that overcomes the problem of distortion when putting the wrap on a three dimensional product.

Perhaps the biggest trend in pack branding over the past decade has been



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COMMERCIAL FEATURE

PERFECT FOR THE UNBOXING GENERATION

The boom in online shopping and next-day delivery, with consumers savouring the “unboxing experience”, means Ranpak paper packaging is a perfect fit



Given that one in every ten retail purchases is now made online, it seems the UK has become a nation of e-shoppers. Worldwide, more and more people are spending time waiting for the post or a delivery van, with e-commerce sales up 20 per cent in 2014 to almost \$840 billion, according to the Global Retail E-Commerce Index – and that’s a lot of big brown boxes.

For in-the-box packaging, this booming trend carries special implications, says Iwan Schmitz, director of marketing at Ranpak, the world leader in paper packaging solutions for e-commerce. “Product protection and cost in-the-box are obviously important, but there is a different driver for e-commerce packaging that is usually priority number one – the need for speed,” he says.

SPEED

In a bid to meet customer expectations for rapid turnaround on product combinations

and next-day delivery, leading parties are all looking to ship out as many packages as rapidly as possible. At the same time there is pressure to reduce the element of labour in the packaging operation to be more cost competitive.

Fast and flexible, the ability of Ranpak’s paper packaging systems to dispense solutions on the spot can help shippers work up to 30 per cent quicker, compared with competitive alternatives. The versatility of paper is also helpful, with a typical e-commerce requirement being to box up together a random mix of products, which just happened to be added into the online shopping cart at the same time.

Since the individual products often already come pre-packaged, the priority of secondary packaging is as much to protect the brand packaging as the goods themselves.

Ultimately, if the quality of protection generates even a fraction of a percentage saving on returns due to breakages and

“**Product protection and cost in-the-box are obviously important, but there is a different driver for e-commerce packaging that is usually priority number one – the need for speed**”

damage, benefits can equate to significant payback. Plus, happy customers mean enhanced prospects for repeat purchases.

SATISFACTION

In contrast to the complexity of business-customer operations, at first glance the end-user perspective on packaging appears pretty uncomplicated, says Jeroen

van Oosterhout, Ranpak marketing manager for e-commerce. “In essence, consumers are looking for a pleasant unpack experience, followed by straightforward disposal, or easy returns, with paper a winner on all counts,” he says.

As paper is easy to handle and keeps its shape well in transit, it is readily reused for sending products back. In addition, with domestic and kerbside collection common, paper is the most recycled product in Europe, at a rate of 72 per cent.

However, according to Mr van Oosterhout, a more sophisticated appreciation of the importance of the unpacking experience is now on the rise at e-commerce companies, not least as a result of the “unboxing” video phenomenon on YouTube. “Consumers are becoming increasingly aware of what they buy, where it is coming from and how it arrives, plus they are more critical publicly, online and on social media. Therefore, we are seeing e-commerce clients keen to differentiate their offering by providing a superior unpacking experience.

“For Ranpak, this is where our award-winning Geami WrapPak product is proving so popular,” says Mr van Oosterhout.

SUSTAINABLE

Geami WrapPak is a cost-effective, attractive, efficient and eco-friendly alternative to bubble wrap, plastic and foam sheets. In terms of the technical specification, it combines a die-cut kraft paper with a tissue interleaf paper. The patented converter expands the die-cut paper to a 3D honeycomb structure providing a unique wrapping product. By locking angled cells together, items are firmly wrapped and no tape is needed.

It is, therefore, the expertise at the design and manufacturing stage that makes the user experience with Geami so quick and easy. From Forest Stewardship Council-certified sources, Geami is green both in origin and disposal, so climate neutral, recyclable and renewable.

GOLD AWARD WIN FOR GEAMI

The packaging category gold award at the inaugural UK IntraLogistics Awards 2015 was won by Ranpak for Geami WrapPak, championed as one-of-a-kind packaging that combines both protection and in-the-box presentation.

What one of the judges, Jonathan Hardie, global head of manufacturing at Premier Farnell, had to say:

“Success for Ranpak was driven by a number of key features:

- Geami WrapPak offers a green environmentally friendly alternative to traditional bubble wrap and there have been few innovations in this area for many years.
- It requires less packaging, leading to smaller packages, reduced storage and transport costs, plus consequently a shrinking of the carbon footprint.
- It provides better presentation and makes it easier for consumers to dispose of packaging through traditional recycling routes
- Ranpak have taken an ‘unglamorous’, but important, area and come up with an innovative, cost-effective, green solution.”

EXPERTS

As marketing director Mr Schmitz concludes, it is this in-built sustainability of paper packaging that makes Ranpak so ready for the e-commerce revolution and the circular economy alike. “For 40 years, Ranpak has been protecting products for over 25,000 companies across more than 300 industries, from aerospace to cosmetics, from a 260lb window to a box of cookies. Paper can be used for cushioning, void-filling and wrapping. It is fast, flexible and affordable. It is also people and planet-friendly – perfect for the unboxing generation,” he says.

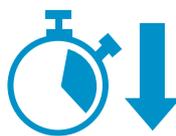
www.ranpakeurope.com



The recycling rate for paper is 72% compared with 24% for plastic-based packaging



9 out of 10 consumers prefer paper



30% faster packing compared with other solutions

Labels will have to say so much more

With limited space on a label, mobile technology is set to bring shoppers additional product information, as legislation pushes brands towards greater transparency and accountability

◆ LABELLING

● NICK MARTINDALE

As consumers, we are now both more health conscious and sceptical than ever before. High-profile scandals in the food, banking and automotive sectors have made people more mistrustful of almost every product they purchase, creating pressure for greater transparency around just what it is people are buying, and where it has come from.

As a result, labels are playing an increasing role in helping organisations convey information to consumers, not only to comply with legislation, but also to stand out from competitors. “Consumers are keen to get more information about what they are buying, as well as what makes up the product they have chosen, and about the company making it,” says Mike Jarvis, cluster portfolio manager, Europe and Central Asia, marketing and product management, at food packaging business Tetra Pak.

“This needs to be clear, consistent and transparent, linking to platforms which offer greater detail and, ideally, independent product reviews. There is a race for space to communicate these messages.”

At the same time, however, the current picture is both confused and confusing. “Price labelling in supermarkets is probably one of the biggest consumer annoyances,” says Helen Dewdney, author of both *How to Complain: The Essential Consumer Guide to Getting Refunds, Redress and Results*, and *The Complaining Cow* blog. “Consumers are sick and tired of labelling that makes it difficult to work out what item is the best offer. There has also been a lot of talk about traffic light systems for showing how healthy a food is. But consumers want consistency – it’s not helpful to have a different system giving similar nutritional information across supermarkets.”



Information sharing will extend beyond the limited space on product packaging and labelling to mobile screens and social media via QR codes

Sell-by and use-by dates are a particular source of confusion, says Nir Wegrzyn, chief executive at global brand design and packaging agency BrandOpus. “These mean two totally different things and consumers don’t have the time or the inclination to understand the difference,” he says.

“The whole idea is also seriously compromised when products that clearly don’t require this kind of legislation are



Bump Mark: Solveiga Pakštaitė's award-winning bio-reactive expiry label, which becomes bumpy when the food expires

NEW LABELLING REQUIREMENTS IN EU FOOD LEGISLATION



Allergen information in ingredients list for pre-packed foods



Nutrition labelling in a consistent format for pre-packed foods



Minimum font size for mandatory information on food labels



Country of origin for fresh, chilled and frozen meat



Date of freezing for frozen meat and fish



Compositional standards for minced meat



Additional labelling for drinks with high caffeine content



Added water over 5% must be declared in the name of food/meat product

Source: Food Standards Agency

forced to adopt it. Honey, for example, doesn’t go off. Some brands out there have had a bit of fun and switched out ‘use by’ for alternatives such as ‘throw me away after’. This is a much clearer instruction to consumers and doesn’t leave any ambiguity.”

New legislation is adding to the pressure for labels to be clearer. In 2016, the European Union’s Food Information Regulation will come into force, meaning all food products will have to provide full nutritional information. “Any products that fail to comply will create significant losses – the impact on the bottom line could be over £100,000,” says Shaun Bosson, executive vice president, global sales, at packaging business Trace One.

This could be just the beginning of a push towards greater transparency, particularly in the food sector. “Some countries, such as Germany, also have regulations that mean brands can no longer use a picture of a food if it’s made using artificial flavourings,” says Amy Steinmetz, vice president, managing director, at LPK Europe. “For example, sweets made with strawberry flavourings cannot have a picture of a strawberry, but instead there can be an image that represents a strawberry. It both makes legislation tough to navigate and forces a new level of transparency.”

Labels, though, do more than simply convey information and help organisations meet regulatory requirements.

New technology means some businesses are now seeing them as a form of marketing, helping to entice and engage customers. An example is the winner of the 2014 James Dyson Award, Solveiga Pakštaitė, who created a bio-reactive label to help alert customers when items could be going out of date. “The idea is simple – when the label becomes bumpy to the touch, your food is off,” says Vicky Bullen, chief executive at design agency Coley Porter Bell.

New developments could help to change the landscape still further, with labels becoming a starting point for finding out information, rather than a final destination. Phil Dalton, head of regulatory at Sun Branding Solutions, believes radio-frequency identification

or RFID will soon be able to allow shoppers to tot up the total nutritional value of a basket of shopping rather than individual items. “This could supplement the information offered on a label,” he says. “RFID not only ensures traceability, it could also point consumers towards the impact of individual food choices on their overall diet.”

Mobile devices too will have a greater role to play, potentially easing the battle for space on more conventional labelling. “Information sharing will extend beyond the limited space on product packaging and labelling to mobile screens and social media via QR [Quick Response] codes,” says Trace One’s Mr Bosson. “In future, consumers could even ‘opt in’ to information that is most relevant to them.”

This kind of development could also help the packaging and labelling industry respond better to rapidly emerging trends, says BrandOpus’s Mr Wegrzyn. “The logistics of printing mandatory information makes it impossible for brands and manufacturers to keep in step with the ever-changing viewpoint on health and nutrition,” he says. “One day fat is the issue, the next day it is sugar and in the future it will be something else. A digital approach could be a lot more effective way to keep information up to date and current.”



When metal packaging reaches the end of its useful life, it can simply be collected and recycled, again and again, with no loss of quality.

This means that metal is a permanent material which will always be available for future generations. What is more sustainable than permanent ?

Be part of the material to material loop – recycle your metal packaging – today's can could be tomorrow's car.

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