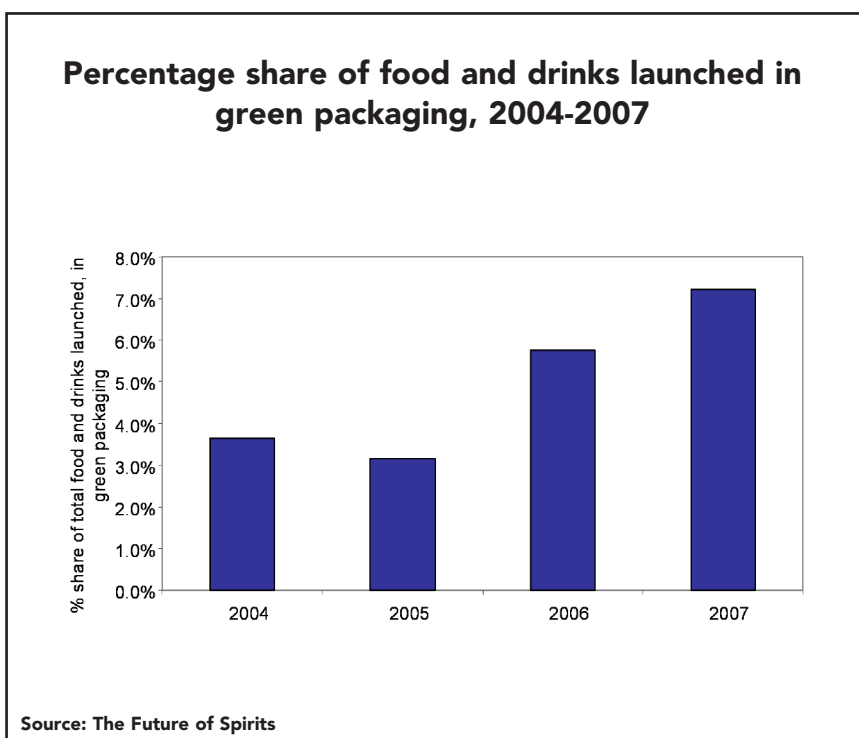


## BUSINESS INSIGHTS

### Future Food and Drinks Packaging

Emerging ethical, food safe and convenient formats



“The share of all food and drinks products launched in ‘green’ packaging between 2004 and 2007 has grown steadily from a 3.6% share in 2004 to 7.2% in 2007, a growth of almost 100% over the period in question. This growth has been driven by a number of factors including green packaging legislation, retailer pressure and also the growth of the green tag, particularly in wine products...”

**Understand the current innovations in the food and drinks packaging market and identify the emergent trends and growth opportunities over the next few years with this new report...**

## Business Intelligence for the Consumer Goods Industry

**Business Insights'** portfolio of consumer goods management reports are designed to help you make well informed and timely business decisions. We understand the problems facing today's consumer goods executives when trying to drive your business forward, and appreciate the importance of accurate, up-to-date, incisive product, market and company analysis. We help you to crystallize your business decisions.

The **strength of our consumer goods research and analysis** is derived from access to unparalleled databases and libraries of information and the use of proprietary analytic techniques. Business Insights reports are authored by independent experts and contain findings garnered from dedicated primary research. Our authors' leading positions secure them access to interview key executives and to establish which issues will be of greatest strategic significance for the industry.

Our consumer goods portfolio of reports can be used across a wide range of business functions to assess market conditions and devise future strategies and cover the **food, drink, health, cosmetics, toiletries, dairy** categories and **key consumer issues** including **eRetail** and **marketing**.

### Key issues examined by this report...

Zwywiec Beer



Source: Future Food and Drinks Packaging

"In developing markets such as those in Eastern Europe, Western manufacturers are driving growth of the can category by distinguishing their product by packaging in cans instead of the more traditional material of glass. One example is the Zwywiec brand, which is owned by Heineken. Although the product has traditionally been sold in glass, Zwywiec has started producing beer in high-quality embossed cans..."

- **Environmental packaging regulations are heavily influencing packaging development in Europe and Japan.** In Europe, Packaging Directive 2004/12/EC sets out recycling and recovery targets to be met by 2008. In Japan, the Ministry of Economy, Trade and Industry (METI) has enacted legislation based on the 3R's ethos (Reduce, Re-use, Recycle). As a result there are high levels of innovation in green packaging including lightweight and bio-based packaging materials.
- **Emerging markets are spurring demand for packaging.** As economies such as Eastern Europe, India, South America and China experience growth and average incomes increase, the demand for Western style packaged goods is increasing.
- **Socio-demographic shifts are creating demand for more convenient packaging solutions.** Ageing populations in the US, Europe and Japan are placing new demands on packaging design. Easy open, easy grip and smaller portion sizes are all being developed with ageing populations in mind. More fragmented family lives, the growth in the number of women working, growth in single person households and a loss of cooking skills are all contributing to increased demand for more conveniently packaged food formats.

## Future Food and Drinks Packaging

Emerging ethical, food safe and convenient formats

**Total glass market value by region, all players, (\$bn), 2007**

Region	2007
South America	6.1
North America	5.2
Europe	11.6
Asia-Pacific	8.0

Source: Future Food and Drinks Packaging

“North America is the second largest region for glass packaging but has a very different market structure to Europe. One of the key differences is that a very large proportion of glass packaging is used for beer. In the US, for instance, nearly 55.0% of all glass containers are used for packaging beer. North America is also a much more consolidated market, with just three key players: Owens-Illinois, Saint-Gobain and Anchor glass...”

Food and drinks packaging is in a period of rapid change; growth economies such as China and India are generating considerable opportunities for packaging manufacturers. In more mature economies, greater expendable income levels coupled with demographic shifts and a demise in cooking skills, have led to increased demand for more conveniently packaged food and drinks formats. A major force in packaging innovation is green packaging. This has been driven by legislation, combined with consumer and retailer pressure.

**Future Food and Drinks Packaging** is a new management report published by Business Insights that offers a comprehensive overview of the major trends within the packaging industry today. It profiles major innovations within food and drinks packaging, including the latest technologies and materials. It also delivers an overview of competitor activity and an assessment of the strength of trends and market forces moving forward.

**Discover the key trends impacting the food and drinks packaging market and understand how these are changing packaging design with this new report...**

## This new report will enable you to...

### Easy open shelf ready packaging



Source: Future Food and Drinks Packaging

“Where more complex packaging is required, simple opening instructions through the use of pictorial images can facilitate multi-geography implementation. It is important that the shelf ready packaging is not damaged during opening; therefore shelf ready packaging that is designed to be opened without the use of tools such as knives is optimum. This ‘easy open’ shelf ready packaging is produced by Australian packaging manufacturer Visy Board. The packaging features easy open pull tabs. The packaging is promoted as requiring no knife for opening, thereby reducing product damage...”

- **Gain insight into the most up to date packaging technologies** including nanotechnology, natural polymers and edible coatings, and evaluate the pros and cons of these new packaging technologies and decide whether these may be appropriate for your organization.
- **Enhance your product development strategies** with this report's analysis of green, convenient and supply chain efficient packaged food and drinks product launches by region, category and material.
- **Understand how regulations are influencing NPD** and discover how competitors are responding to new challenges set by these regulations with this new report.
- **Identify the key trends in food and drinks packaging** and the impact that they are expected to have on the food and drinks market in the future.

## Your questions answered...

### Puget Extra Virgin Olive Oil, packaging for food safety, convenience and shelf-life extension



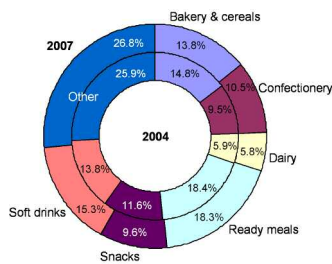
Source: Future Food and Drinks Packaging

"A membrane that incorporates an oxygen barrier has the potential to keep products fresher for longer. An example of such a membrane can be found in Puget Olive Oil packaging, launched in the US by French based Leisure. This product features a Bericap closure with a 'tamper evident and oxygen barrier tear off membrane, a non drip dispenser and a 'marguerite' flow control device..."

- What major trends are impacting food and drinks packaging development?
- How are companies using green packaging materials to lend credibility to their ethical policies?
- What innovative materials are being used within food and drinks packaging?
- What has prompted the rise in tamper evident packaging and what could future tamper evident packaging legislation look like?
- How is nanotechnology being used in food and drinks packaging?
- What are the new innovations in supply chain efficient packaging?
- How has extended shelf life packaging impacted the food and drinks industry and what has it enabled?

## Some key findings from this report...

### Percentage share of food and drinks launched in convenient packaging by category, 2004-2007



Source: Future Food and Drinks Packaging

"Between 2004 and 2007, the share of food and drinks launched in convenient packaging by category has remained fairly stable across the categories. Ready meals remains the most significant category for products launched in convenient packaging, with a share of 18.3%, a reduction of just 0.1 percentage points since 2004..."

- **Innovation in packaging materials continues apace with particular development in green technologies** such as packaging made from natural polymers and oxydegradable additives. In addition nanotechnology is now a key part of new material development. Nanotechnology can improve barrier qualities and make packaging lighter, stronger and more resistant to heat.
- **Non-malicious food contamination is an international health concern.** The World Health Organization estimates 3.2m children under the age of five die from food poisoning related illnesses each year. Innovative solutions to reduce the risk of non-malicious contamination are being developed by packaging manufacturers in the form of 'Smart' and 'Active' packaging.
- **An ageing population in China, Japan, the US and Europe is driving demand for products suited to the older consumer,** including easy grip and easy open packaging as well as smaller portion sizes for consumers with smaller appetites.
- **Major retailers in Europe and the US have developed their own Corporate Responsibility Strategies and have set targets for the reduction in packaging waste.** Wal-Mart has committed to a 5% reduction in packaging worldwide by 2013. UK retailer Marks & Spencer's, has committed to a 25% reduction in waste by 2012.

## Sample from 'Future Food and Drinks Packaging'

### Chapter 2: Green Packaging

#### Biopolymers

Biopolymers are derived from biomass. Made from natural renewable resources such as potato starch, they are one of the most innovative forms of green packaging.

Biopolymers may or may not be biodegradable. For example Poly(lactic acid) (PLA) which is made from corn, is biodegradable. Polythene made from bioethanol, an alcohol made by fermenting the sugar components of a biomass is not biodegradable, but does come from a renewable resource.

Bio-based polymers can be divided into three categories according to their origin and production, these are:

- Polymers directly extracted or removed from biomass. Examples are polysaccharides such as starch and cellulose and proteins like casein and gluten;
- Polymers produced by classical chemical synthesis using renewable bio-based monomers. Poly(lactic acid) (PLA), a biopolymer polymerized from lactic acid and monomers. Such polymers may be produced via fermentation of carbohydrate feedstock. PLA and PLA blends tend to come in the form of granules and are used in plastic processing for the production of amongst other things foil, cups, bottles and other packaging;
- Polymers produced by microorganisms or genetically modified bacteria. This group consists mainly of polyhydroxyalkonates (PHA), although developments with bacterial cellulose are in progress.

A recent example of PLA in food packaging is Revolution T-Organics biodegradable tea bag made out of polylactate acid yarn. Launched to the US market in March 2005, manufacturers Revolution Tea claim that it is the first 100% biodegradable tea bag to be launched. Similarly, the Mighty Leaf Tea Co's line of Mighty Leaf Whole Leaf Tea is presented in new biodegradable pouches. Launched to the US market in May 2005, the pouches are 'uniquely stitched mesh polylactic acid material made from corn starch'. They are claimed to be the industry's first stitched mesh nylon tea pouch.

Starch based materials make up about 50% of bioplastics, with thermostatic starch currently representing the most important and widely used bioplastic. Recent starch based introductions to the food and drinks packaging market include corn-starch based bioplastic water bottles.

**Figure 2.15: Polylactic acid used for tea bags and pouches**



Source: Future Food and Drinks Packaging

Order this report today to find out more...

# Table of Contents

---

## CHAPTER 1: THE PACKAGING MARKET

- Introduction
- The packaging market
  - Market value and growth by geography
  - Market value and growth by packaging type

## CHAPTER 2: GREEN PACKAGING

- Introduction
- Green packaging
- Innovation and NPD
  - Category analysis
  - Regional analysis
  - Packaging material
- Trends in green packaging
  - Recyclable materials, recycled materials and re-usable packaging
  - Reduced/lightweight packaging
  - Biopolymers
  - Sustainable packaging
- The future of green packaging

## CHAPTER 3: SUPPLY CHAIN EFFICIENCY

- Introduction
- Supply chain efficiency in food and drinks packaging
- Innovation and NPD
  - Category analysis
  - Regional analysis
  - Packaging material
- Trends in supply efficient packaging
  - Shelf ready solutions
  - Packaging that extends shelf life – aseptic packaging
  - Radio Frequency Identification - RFID
- The future of supply chain efficient packaging

## CHAPTER 4: FOOD SAFETY PACKAGING

- Introduction
- Food safety packaging categorized
  - Tamper evident
  - Contamination prevention
- Food safety packaging and regulatory issues
- The future of food safety packaging

## CHAPTER 5: CONVENIENT PACKAGING

- Introduction
- Convenient consumption
  - Demographic shifts
  - Families leading more fragmented lives
  - Increased income levels

- Innovation and NPD
  - Category analysis
  - Regional analysis
  - Packaging material
- Trends in convenient packaging
  - Easy handling packaging
  - Ergonomic design
  - Convenient storage solutions
  - Convenient preparation
  - Single portions
- Regulatory issues
- The future of convenient consumption packaging

## CHAPTER 6: NEW MATERIALS

- Introduction
- What are the newest materials on the market?
  - Nanocomposites and nanofilms
  - Natural polymers and films
  - Oxydegradable additives
  - Edible coatings and films

## CHAPTER 7: CONCLUSIONS

- Introduction
- Market influences
  - Ethical concerns
  - Rising affluence
  - Food safety
  - Health and wellbeing
- Market opportunities
  - Ethical marketing
  - Convenience
  - Shelf stable packaging
- Index

## TABLES

- Global consumer packaging market value share and predicted growth, by region/packaging type, 2005-09
- Gross domestic product based on purchasing-power-parity (PPP) per capita GDP
- Sales growth by market at Rexam PLC (£m), 2005-06
- Shipments and per capita consumption of cans
- Total glass market value by region, all players, (\$bn), 2007
- Share of food and drinks paper packaging market and value of paper market by region, (\$bn), 2007
- Quantity of carton packages in key growth markets for Tetra Pak, (bn), 2006

## Table of Contents (contd.)

### TABLE (CONT)

- % share of food and drinks launched, by packaging material, 2005-07
  - Green packaged
  - Convenient packaged
  - Supply chain efficient

### FIGURES

- Zwyiec Beer
- Premium metallic packaging
- Specialty can packaging; Nomu Vanilla Paste
- Share of glass packaged food and drinks products by number of containers sold, by category, UK, 2005
- Municipal waste management in the EU, 2003
- Jars promoted as being 're-usable'
- Kool Aid Sachets and Teisseire Teissi La Dosette de Sirop
- Heinz lightweight can-ends
- Lightweight glass; Adnams Beer and Meidi-ya Jam
- Lightweight PET container; Otsuka Pocari Sweat
- Yellow Jersey French Wine Launched in PET Oxygen-Barrier Container
- Polylactic acid used for tea bags and pouches
- Corn Starch Bio-Bottle
- Recycled, biodegradable packaging with corn-starch 'window'
- Sustainable packaging
- % share of food and drinks launched by category/region, 2004-07
  - Green packaging
  - Convenient packaged
  - Supply chain efficient packaging
- Easy open shelf ready packaging
- Smurfit Kappa using Microflute for Shelf Ready Packaging
- Wine boxed in aseptic packaging
- Ball packaging Slimline aseptic can
- Aseptic cold filled PET
- Vetee Dine in Rice in aseptic shelf stable trays
- Heinz Baby Food, packaged in vacuum sealed 'Pop-up' jars
- Safety Seal Plastics Inc – supplying food and drinks manufacturers with tamper evident shrink-sleeves
- Sainsbury's use of Induction Sealing for its dairy products
- Puget Extra Virgin Olive Oil, packaging for food safety, convenience and shelf-life extension
- Examples of tearaway and breakaway tamper evident packaging
- Paper-based tamper evident seals used for marketing purposes
- Fresh-check® - indicates when the product is past its use by date
- Roth Kase Cheese in Breathable Packaging
- Cryovac® oxygen-scavenging packaging
- Easy Peel and Easy Tear Packaging
- QC Corps Easy-Open Jam Jars, Meeting Universal Design Rules
- Drinks packaging meeting Universal Design rules for packaging for the elderly and infirm
- Easy open – the innovative Zork wine closure
- Innovative portable packaging; Baroke's Premium Australian Wine in a Can, Raisins d'Automne Tetra Pak Cartons, Hardy's Shuttles
- Frito-Lay's crush proof cups for potato chips
- Sunkist 100% Fresh Ready-to-Eat Fun Fruit for Kids
- Seapoint Farms' Edamame Frozen Organic Vegetables in Pouches
- Kellogg's Good Food to Go! Cocoa Krispies Cereal Cup
- Go Appetit 'food in a bottle' and Morinaga Grapefruit Yogurt Handy Style
- Fridge Packs; DB Breweries of New Zealand Export Gold Beer, Ocean Spray's Juice Drinks, Ozarka Natural Spring Water
- Microwaveable bowls
- Pie-Oh-My introduced using new QuiltWave™ technology
- Chef Creations Sauces using Tetra Pak Tetra Wedge Aseptic TWA mw 200 S packaging
- Jennie-O Turkey Store® Oven Ready Turkey
- Self-heating cans; Brandsource Decadent Hot Chocolate, Wolfgang Puck Gourmet Coffee
- Self-Heating Meals, La Briute Shelf-Stable/Self-Heating Meal and EverSafe Complete Meal Kits
- Self-Cooling Technology; Freddo Freddo Lemon Tea, Feldschlosschen Self-Cooling Keg
- Defense Effervescent Vitamin & Mineral Supplement Drink using FreshCan™ technology
- Kewpie Yasashii Kondate (kind menu) range and Hagoromo Papatto Rice Awase Kome
- Coors plastic beer bottle
- College Farm Natural Organic Candy, packaged in NatureWorks PLA

FAX BACK TO: +44 (0) 207 900 6688

or scan and e-mail to  
[marketing@globalbusinessinsights.com](mailto:marketing@globalbusinessinsights.com)

## I would like to order the following report...

1

(Please use BLOCK CAPITALS)

\_\_\_\_\_

\_\_\_\_\_

**Hard Copy** (extra £50/€75/\$95)  
Please allow 28 days for delivery

**Interactivity** (extra £50/€75/\$95)  
Search, customize & translate content

## Please select a license type:

2

	GB£	EUR€	US\$
<input type="checkbox"/> <b>Single User (eCopy)</b> <small>Access permitted for one individual only</small>	1495	2160	2875
<input type="checkbox"/> <b>Site License</b> <small>Access permitted for every individual based at one location</small>	2995	4330	5750
<input type="checkbox"/> <b>Company License</b> <small>Global access for every individual member of staff at the company</small>	5600	8100	10795

To ask a question about license types, email: [marketing@globalbusinessinsights.com](mailto:marketing@globalbusinessinsights.com)

## Communications Feedback

Please let us know if any of the following factors influenced your purchase...

- |   |   |
|---|---|
| <input type="checkbox"/> Email/Fax/Postal promotion | <input type="checkbox"/> Trade Press          |
| <input type="checkbox"/> Brochure                   | <input type="checkbox"/> My Account Manager   |
| <input type="checkbox"/> Table of Contents          | <input type="checkbox"/> Conference materials |
| <input type="checkbox"/> Colleague Recommendation   | <input type="checkbox"/> Website/web search   |

## Recipient details (if different from Payor)

Title: Mr/Mrs/Ms (Please use BLOCK CAPITALS)

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Email \_\_\_\_\_

Job Title \_\_\_\_\_

Department \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State/Province \_\_\_\_\_

Country \_\_\_\_\_ Post Code/ZIP \_\_\_\_\_

Tel \_\_\_\_\_ Fax \_\_\_\_\_



Marketing Department  
[marketing@globalbusinessinsights.com](mailto:marketing@globalbusinessinsights.com)

Code Ref: Website



[www.globalbusinessinsights.com](http://www.globalbusinessinsights.com)



+44 (0) 20 7551 9700



Registered Office: Business Insights Ltd, Mortimer House,  
37-41 Mortimer Street, London W1T 3JH.  
UK Registered Number: 05006037

## Company details

3

Company name: \_\_\_\_\_

EU companies (except UK) must supply VAT / BTW / MOMS / MWST / IVA / FPA number:

\_\_\_\_\_




Purchase Order Number (if required) \_\_\_\_\_

## Payment method

4

Please indicate your preferred currency:  GB£  EUR€  US\$

Total order value is \_\_\_\_\_

- I will forward a check payable to Business Insights Limited.
- Please invoice my company (please complete invoice address below)
- I would like to pay by bank transfer (email address required)
- Debit my credit/charge card:  Amex  Visa  Mastercard

Card No \_\_\_\_\_

Expiry Date \_\_\_\_ / \_\_\_\_ Signature \_\_\_\_\_

## Payor details

5

Title: Mr/Mrs/Ms (Please use BLOCK CAPITALS)

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Email \_\_\_\_\_

Job Title \_\_\_\_\_

Department \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

City \_\_\_\_\_ State/Province \_\_\_\_\_

Country \_\_\_\_\_ Post Code/ZIP \_\_\_\_\_

Tel \_\_\_\_\_

Fax \_\_\_\_\_

**Sign here to confirm your order:**

ORDERS WITHOUT A SIGNATURE CANNOT BE PROCESSED

By completing this form you agree that the data in the form will be used for the purpose of processing your order. We may also use your data to keep you informed of our products and services. As an international organization, Business Insights may need to process your data in countries which do not have data protection laws, or which have standards lower than the EU. Business Insights seeks to protect your personal data. You have a right to see and correct your data by writing to us. In case of queries, contact [info@globalbusinessinsights.com](mailto:info@globalbusinessinsights.com). Please tick the relevant box(es) if you would not like Business Insights to contact you by:

Email  Post  Fax  Phone

Occasionally, our client list is made available to other companies for carefully selected correspondence. Please check here if you do not wish to receive such correspondence by:

Email  Post

This order is subject to our standard terms and conditions, a copy of which is available on request.