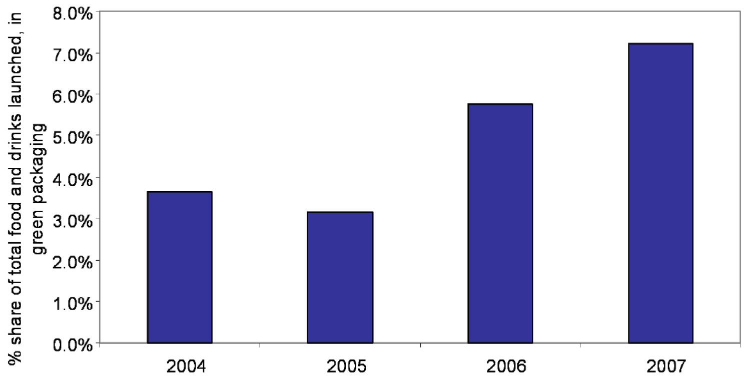
BUSINESS INSIGHTS

Future Food and Drinks Packaging

Emerging ethical, food safe and convenient formats

Percentage share of food and drinks launched in green packaging, 2004-2007



Source: The Future of Spirits

"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 Insights

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.

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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...

Zwyiec 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 Zywiec brand, which is owned by Heineken. Although the product has traditionally been sold in glass, Zywiec 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.

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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.

Business Insights

Your questions answered...

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

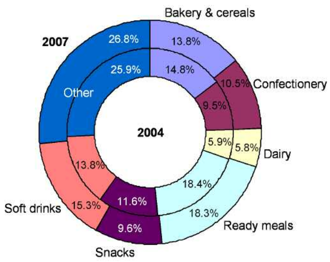
Source:Future Food and Drinks Packaging

"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 Polylactic 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:

Figure 2.15: Polylactic acid used for tea bags and pouches

Source: Future Food and Drinks Packaging

- 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. Polylactic acid (PLA), a biopolyester 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.

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