

Überleben im Dschungel von Nachhaltigkeit und Digitalisierung

ECR Tag 2019

Thomas Reiner | 14. November 2019 | Wien



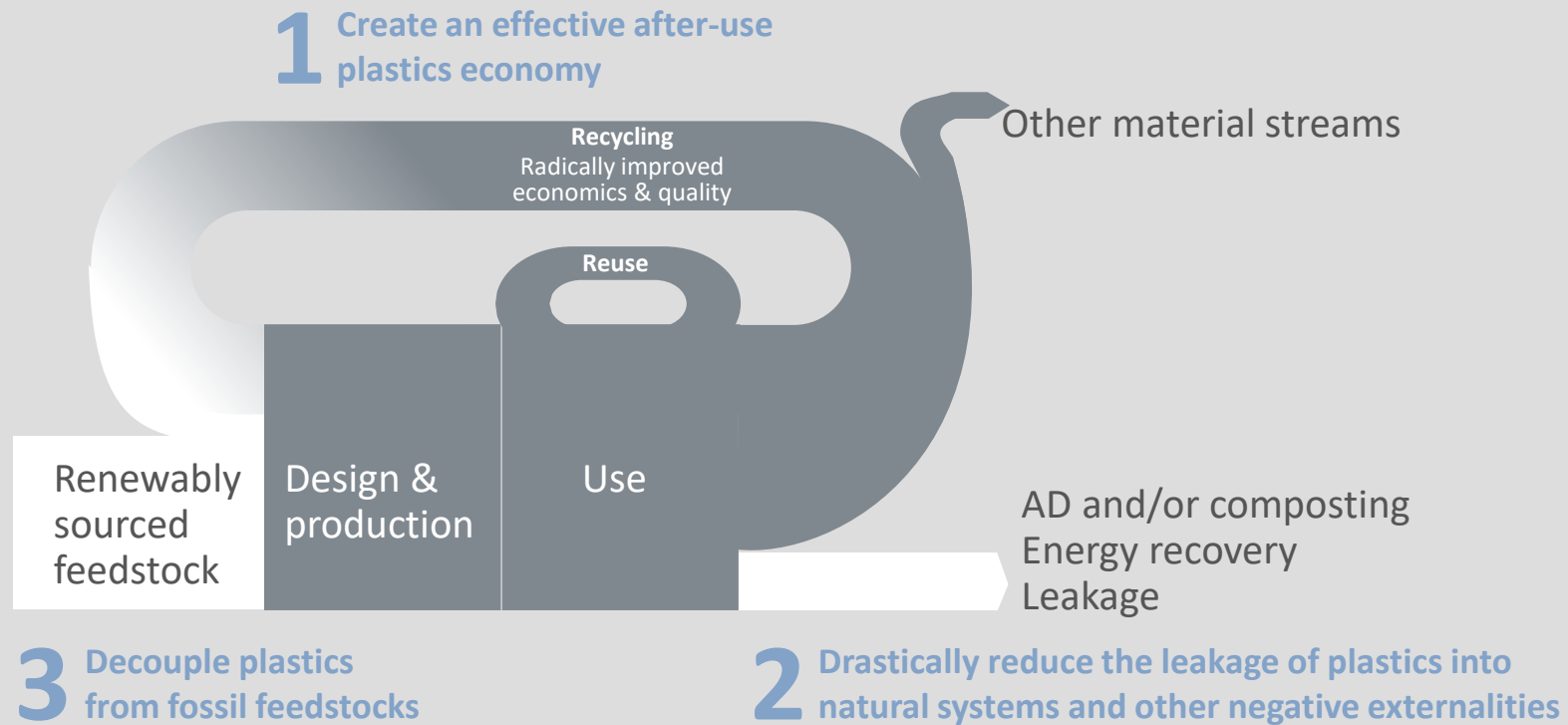
An aerial photograph showing a circular river winding through a dense, lush green forest. The river is a light blue-grey color and forms a large, irregular circle in the center of the frame. The surrounding forest is a vibrant green, with some darker patches of trees. A small, colorful boat is visible on the river's edge on the right side. The overall scene is serene and natural.

Circular Economy

1. People will no longer accept the environmental damages

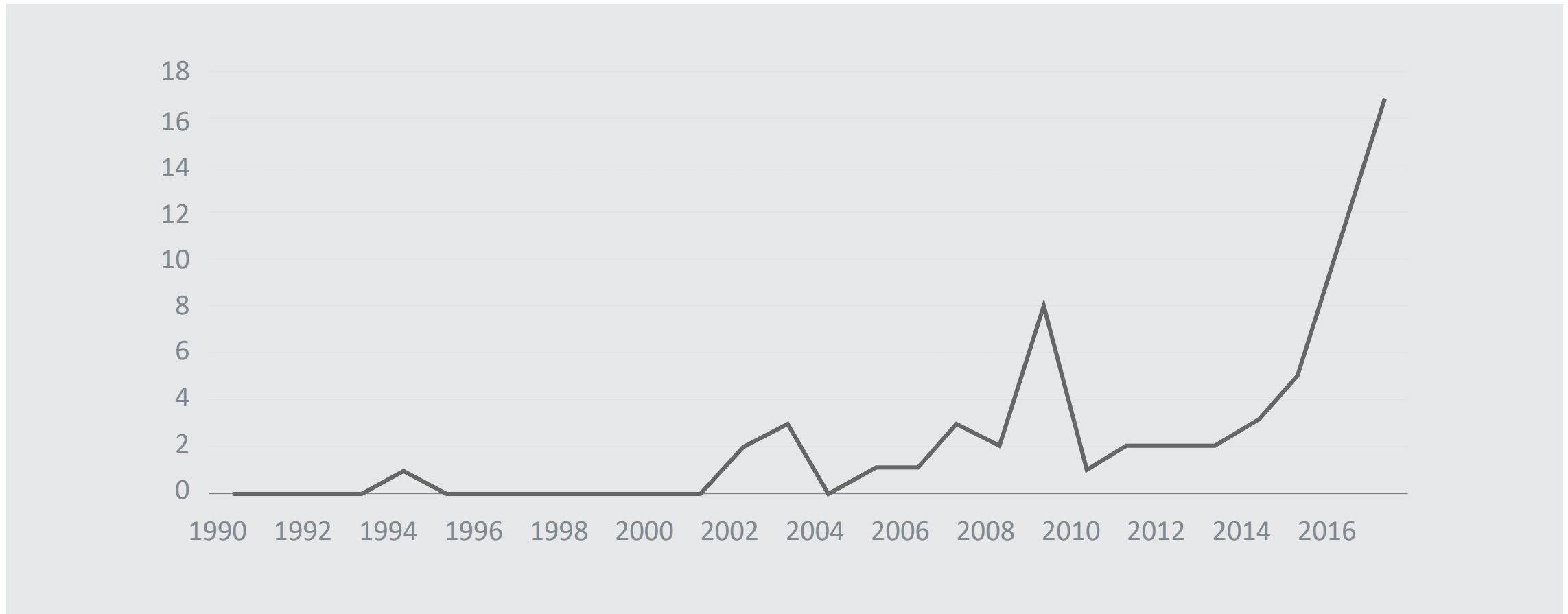


2. NGOs will redefine the plastics economy

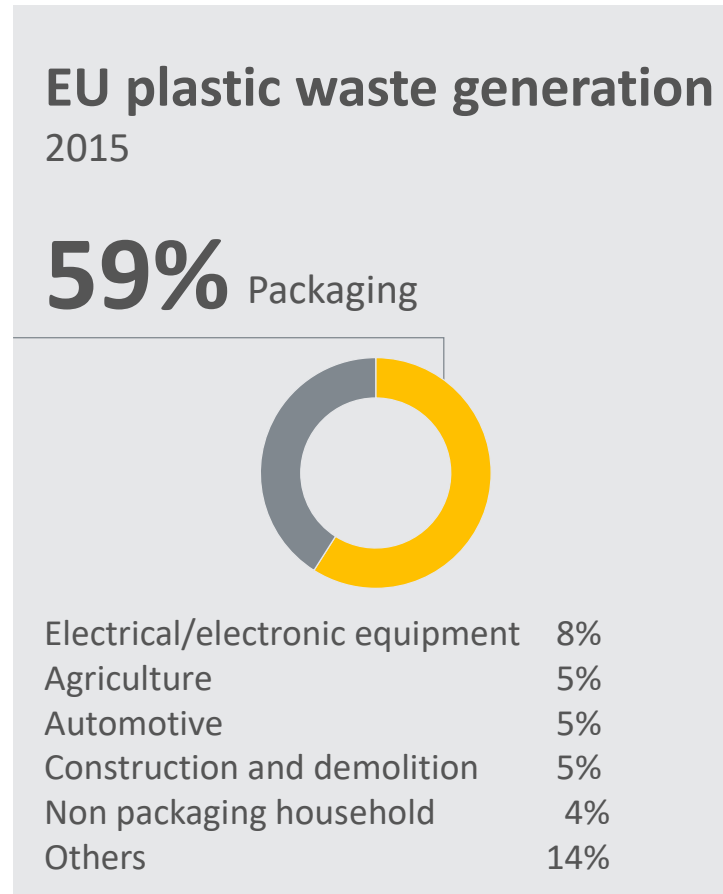
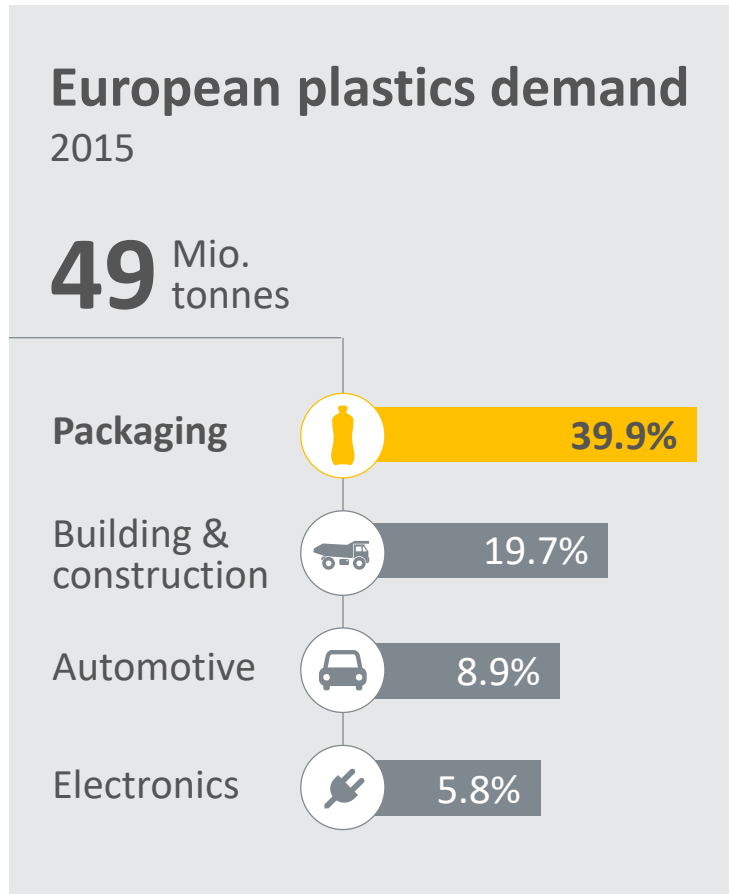


3. Legal activities will increase

Estimated number of new regulations on single-use plastics entering into force at national level worldwide



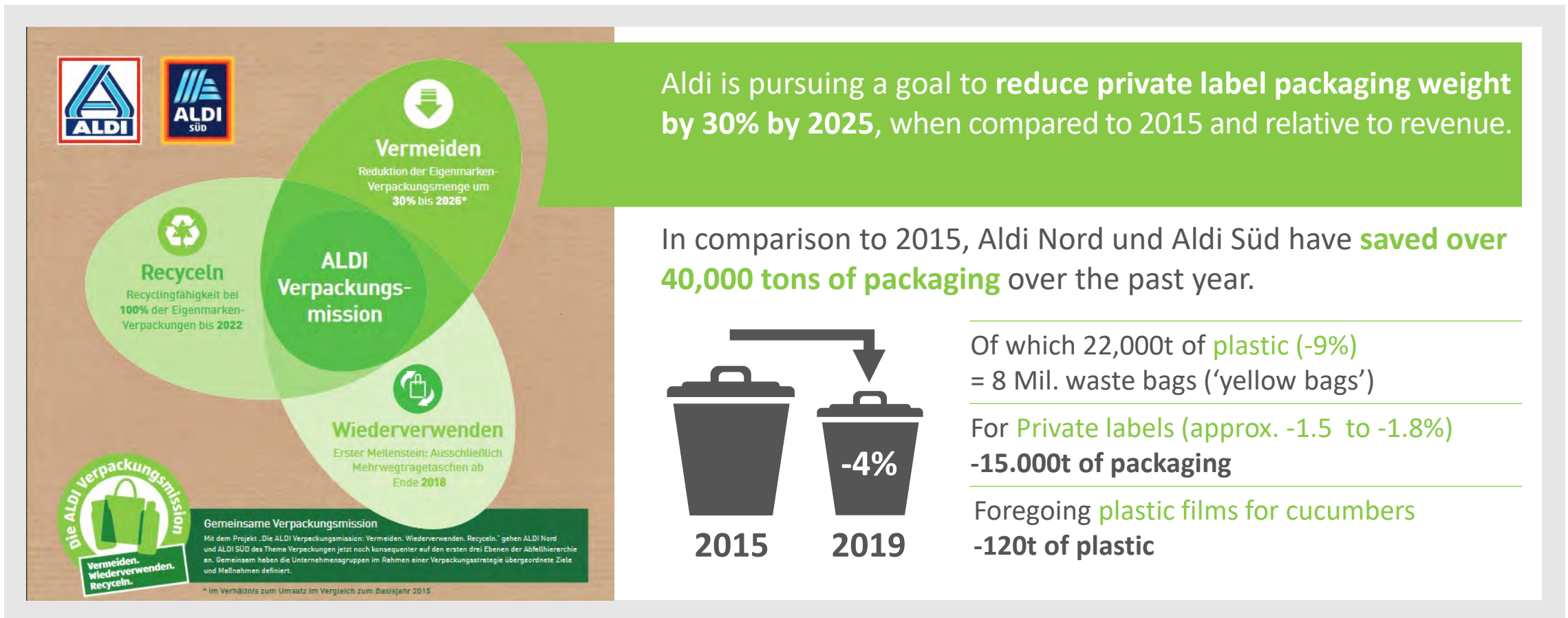
4. Packaging will be #1 target



Source: In the style of "A European Strategy for Plastics in a Circular Economy", European Commission, Brussels, 16.01.2018; Plastics Europe (2016) EU-28, Norway and Switzerland; Eunomia, 2017

5. Retailers will drive the change

Example: Aldi 'Packaging Mission' in Germany







Source: <https://www.presseportal.de/pm/112096/4396088>, <https://www.aldi-nord.de/unternehmen/presse/aldi-pakt-aus-discounter-starten-offensive-gegen-verpackungsabfall.html>; B+P-Estimations based on: <https://www.umweltbundesamt.de/presse/pressemitteilungen/verpackungsverbrauch-in-deutschland-weiterhin-sehr> and <https://de.statista.com/statistik/daten/studie/75383/umfrage/marktanteile-von-aldi-und-lidl-nach-hersteller--handelsmarken/>

6. Brand owners will join the movement

Example: Coca-Cola



7. Packaging materials and structures will change

 <p>IK Germany</p> <ul style="list-style-type: none">– Round Table Eco Design of Plastic Packaging– Guideline in test phase	 <p>ZSVR</p> <ul style="list-style-type: none">– Foundation "Zentrale Stelle Verpackungsregister"/UBA– Guideline on the assessment of the recyclability of packaging– Draft status	 <p>Cyclos-HTP</p> <ul style="list-style-type: none">– Institute cyclos-HTTP– Verification and examination of recyclability– Guideline available	 <p>EMF</p> <ul style="list-style-type: none">– Ellen MacArthur Foundation– Design for Recyclability Guidelines for Plastic-Based Flexible Barrier Packaging– Guideline not yet published
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8. Platform economy will accelerate the change



Packaging platforms

packitoo

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All-in-one management of your packaging project

Creating your custom packaging has never been easier.

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Labelprint24.com

- Labels on rolls
- Printable blank labels
- Multi layer labels
- Booklet labels
- Sheet labels
- Folding boxes
- Corrugated shipping boxes
- Package inserts / packaging inserts
- Laminator tubes
- Printed beverages

48 HR EXPRESS PRODUCTION!
Place your order today and we will ship it within 2 working days!

Labels on rolls - instant price calculation

Labels on rolls - promotional product

Book labels - ALL

Sandwich labels - ALL

Booklet labels - ALL

Folding box with reverse tuck end

Folding box with auto bottom

Cardboard box with hinged lid

Printable blank labels

Flap boxes

More types

Recycling platforms

CirPlus

THE FIRST FULLY DIGITAL PLATFORM FOR RECYCLED MATERIALS

THE MATERIALS MARKETPLACE

JOIN THE MATERIALS REUSE REVOLUTION

Pathway21 speeds the shift to a circular economy by transforming the way manufacturers source, value and manage reusable materials.

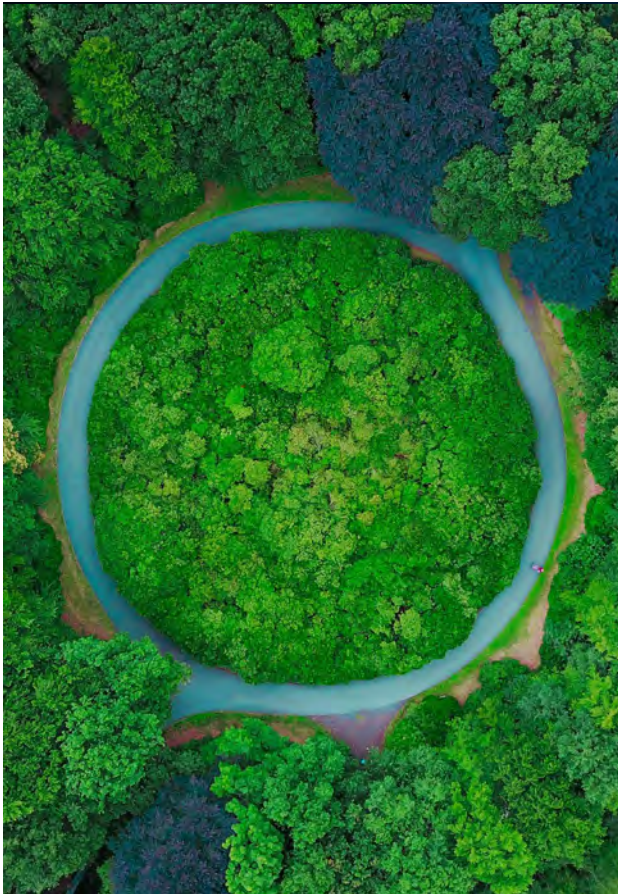
Thanks for stopping by! What can we do for you?

Source: <https://www.labelprint24.com/en/>; <https://www.packitoo.com/index-en.html>; <https://www.cirplus.de/>; <https://pathway21.com/>

9. IoP will create transparency (e.g. Evrythng)

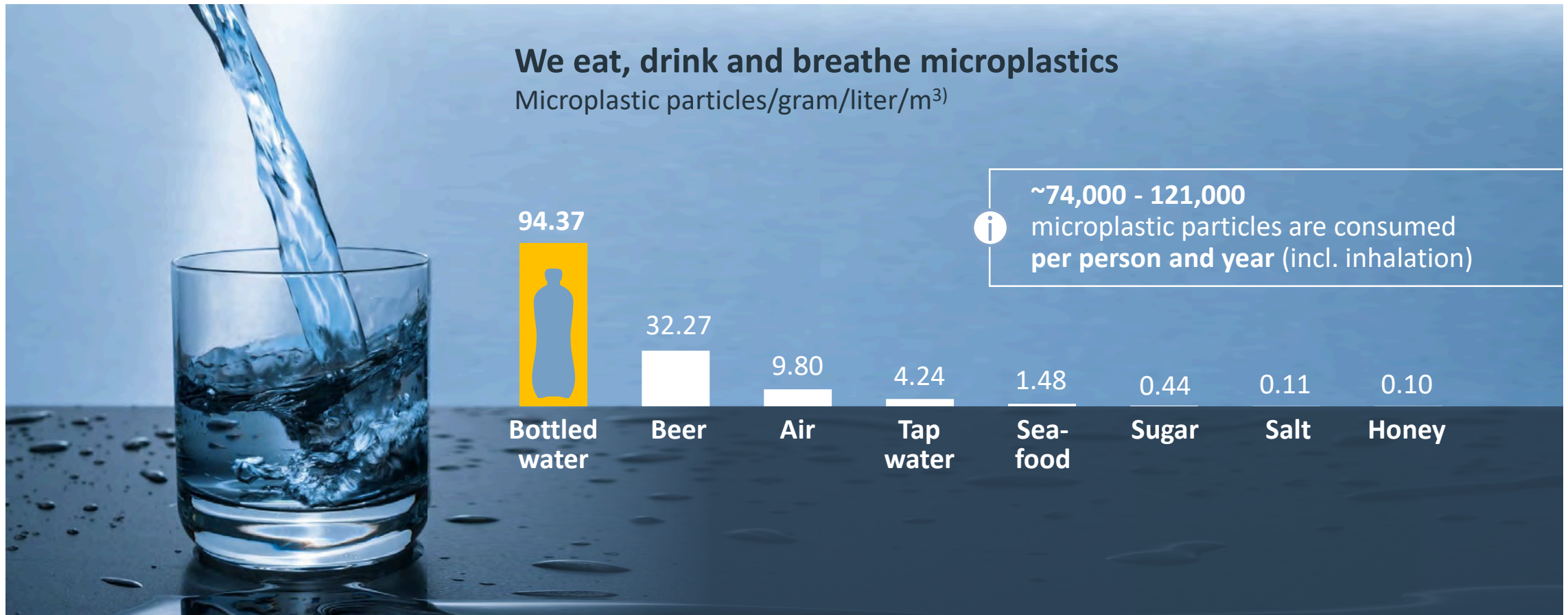


Circular Economy



1. People will no longer accept the environmental damages
2. NGOs will redefine the plastics economy
3. Legal activities will increase
4. Packaging will be #1 target
5. Retailers will drive the change
6. Brand owners will join the movement
7. Packaging materials and structures will change
8. Platform economy will accelerate the change
9. IoP will create transparency
- 10. Other packaging issues will follow**

10. Other packaging issues will follow



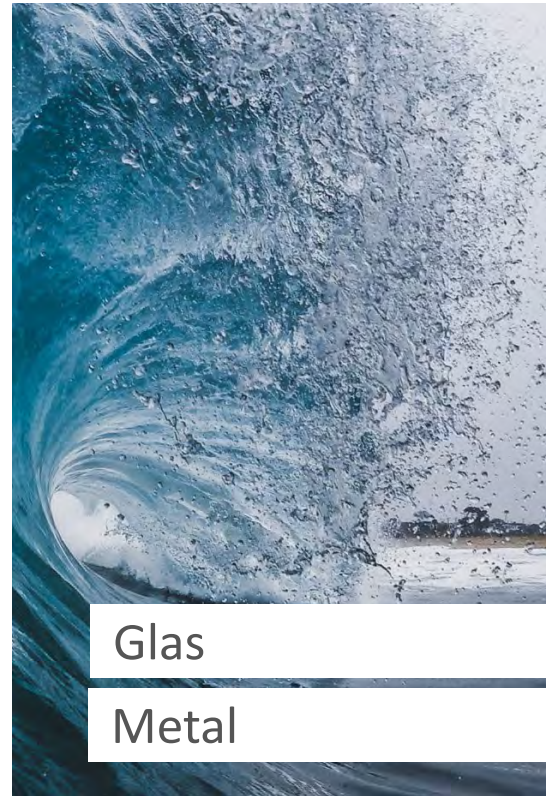
Source: <https://www.statista.com/chart/18299/how-we-eat-drink-and-breathe-microplastics/>
Based on different number of studies; for further information see original source

10. Other packaging issues will follow

Waste



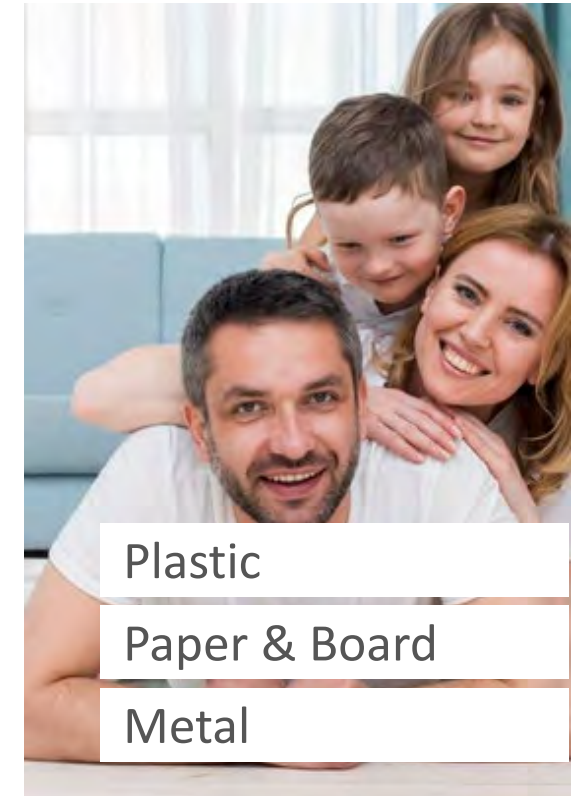
Climate/CO₂



Resources



Health





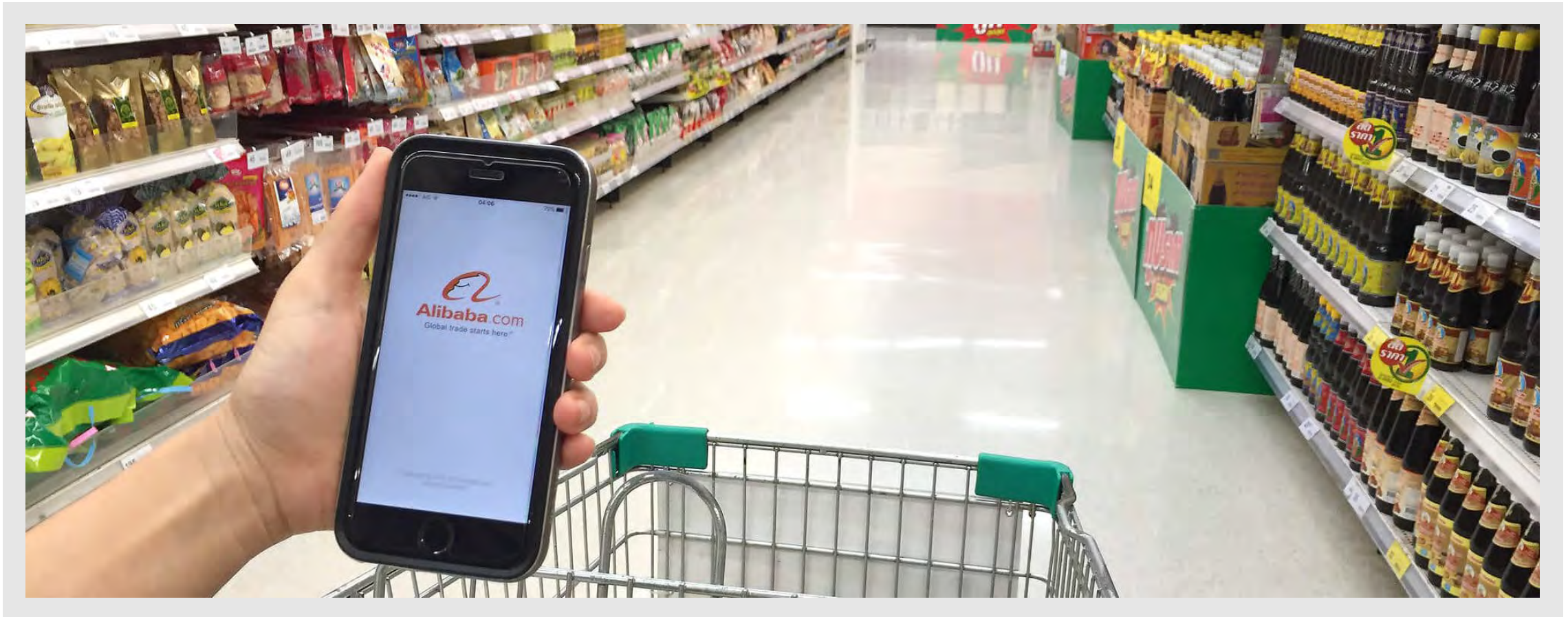
Digital Transformation

- (Digital) Platform economy + E-Commerce
- Digital packaging supply chain
- Smart packaging
- E-Commerce Packaging



1. The market will switch from supply to demand driven
2. Consumers will no longer suffer from shopping torture

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1. The market will switch from supply to demand driven
2. Consumers will no longer suffer from shopping torture
- 3. Traditional retailers will focus on logistics or die**
- 4. Fundamental consumer needs will be core**

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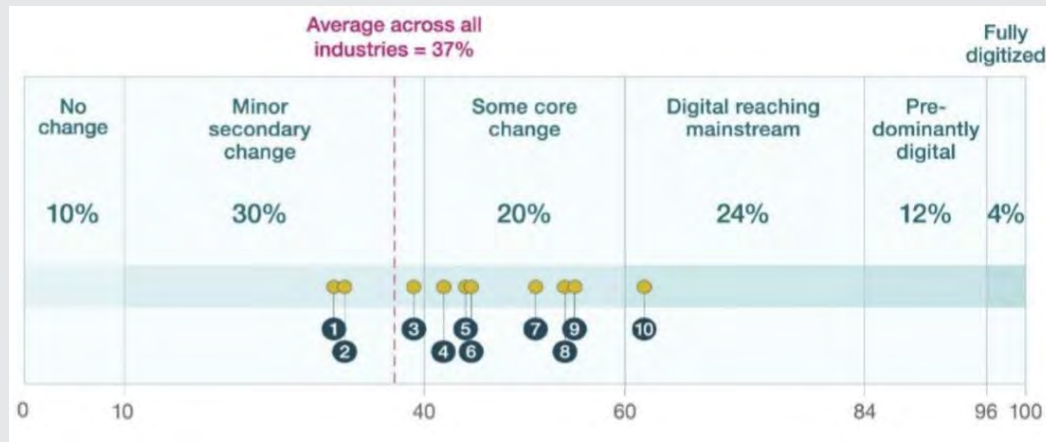
Source: https://www.youtube.com/watch?time_continue=2&v=Pdz0-9if7XI



1. The market will switch from supply to demand driven
2. Consumers will no longer suffer from shopping torture
3. Traditional retailers will focus on logistics or die
4. Fundamental consumer needs will be core
5. **Brands will loose importance and focus on manufacturing**
6. **Packaging design will dramatically loose relevance**
7. **Less packaging because of less food loss (waste)**
8. **Workflows / Manufacturing sites will be fully automated**

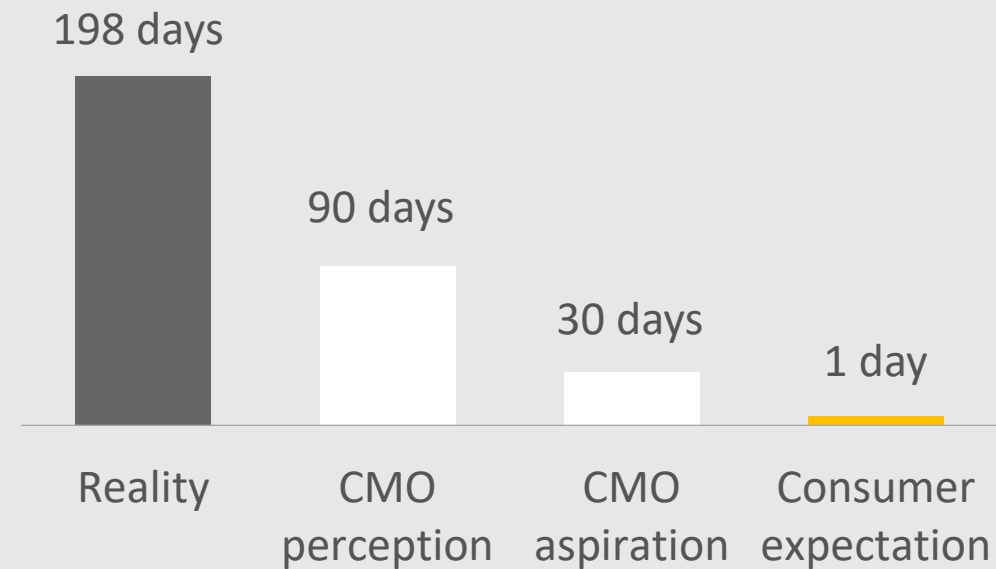
8. Workflows / Manufacturing sites will be fully automated

CPG is lagging behind



- | | | | |
|---------------------------|-----|-----------------------------------|-----|
| 1 Consumer packaged goods | 31% | 6 Travel, transport and logistics | 44% |
| 2 Automotive and assembly | 32% | 7 Healthcare systems and services | 51% |
| 3 Financial services | 39% | 8 High tech | 54% |
| 4 Professional services | 42% | 9 Retail | 55% |
| 5 Telecom | 44% | 10 Media & entertainment | 62% |

Poor agility is the price we have to pay





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- 9. Platforms will dominate the whole value chain**

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Laure Claire Reillier



Benoit Reillier

1. High fragmentation/fragmentation on supply and demand side
2. High capital commitment in production plants (machinery) with low capacity utilization
3. High lack of transparency



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9. Platforms will dominate the whole value chain
- 10. Massive standardization of materials and specifications**

10 . Massive standardization of materials and specifications

12 Film structures cover almost every food application!



5 Mono-Material Systems will cover almost every food application!



Quelle: <https://epacflexibles.com/services/>;

<https://www.borealisgroup.com/news/thinking-circular-borealis-launches-everminds-a-new-communication-platform-dedicated-to-circular-economy-solutions>

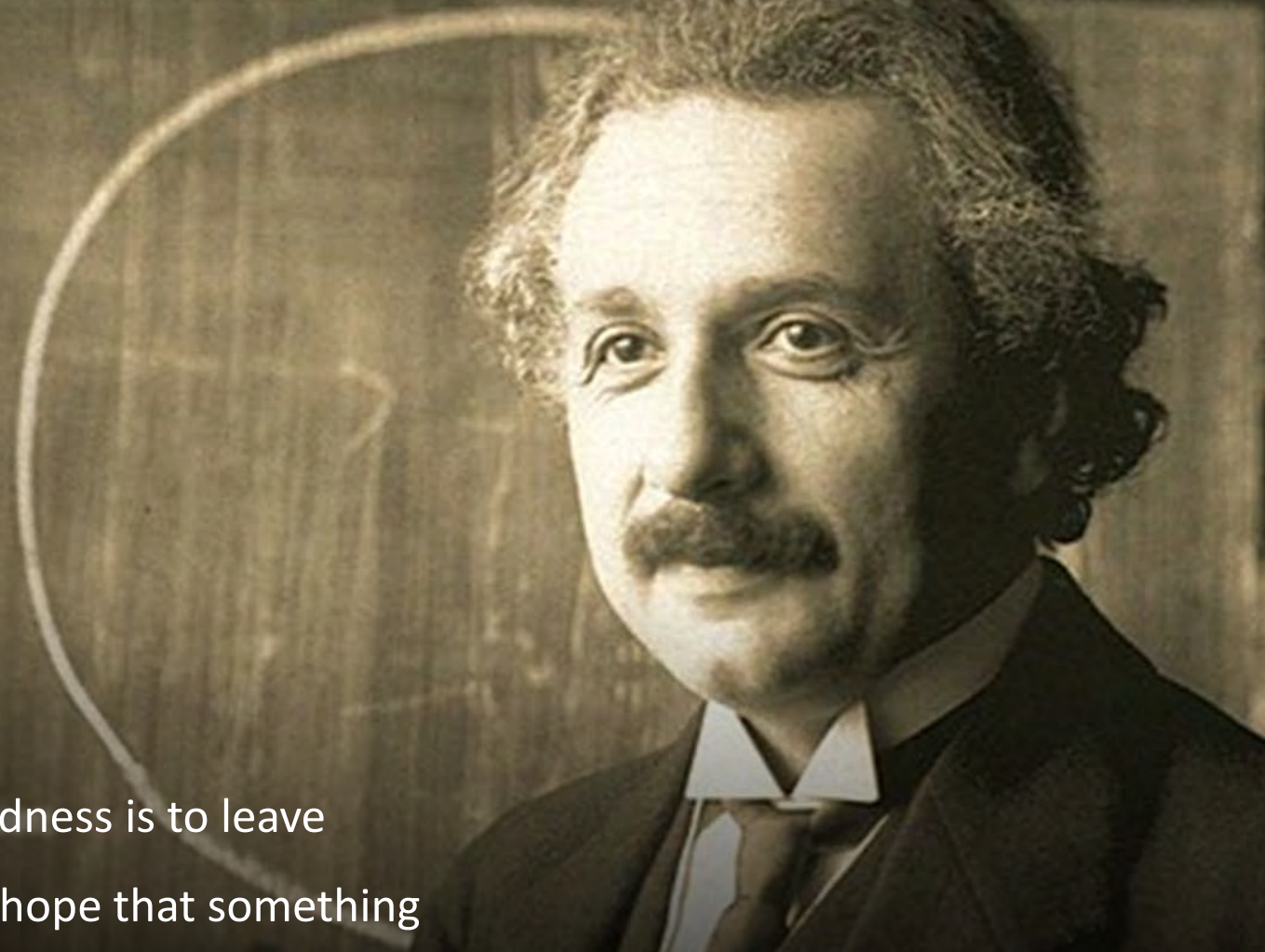
The question is not if, but when and how



Source: <https://unsplash.com/photos/iftBhUFfecE>

Agility

"The purest form of madness is to leave everything as it is and hope that something will change at the same time."



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