



PACKAGING PROCESSING PRINTING LOGISTICS

The vision of the
ALL4PACK Emballage Paris community
on the future of packaging materials

Executive summary

At the World Economic Forum (WEF) on 16 January 2022, 40 major manufacturers answered the call from navigator Ellen MacArthur and warned that "if we continue on the same path, we could end up with more plastic in the ocean than fish (by weight)."¹

The survey conducted by ALL4PACK Emballage Paris between 11 April and 10 May 2022 among 211 packaging decision makers visiting or exhibiting at the tradeshow shows that the entire sector is aware of the need for a green transition: 88% consider it to be a priority in their company to use more environmentally friendly packaging. The main reasons driving this transition are consumer expectations (69% cite them), benefits in terms of brand image (56%) and changes in legislation (49%: this reason is particularly highlighted by large companies).

The packaging revolution is therefore underway, and no fewer than 37% of respondents said they wished to use biomaterials for their packaging in the coming two years. The use of paper and cardboard should also rise significantly (46% of decision-makers declare they wanted to use more of it) while the use of metal, glass and wood should remain relatively unchanged. As for the use of plastic, a real decline is expected to occur (32% are intending to reduce their use of this resource), but only 5% of respondents plan to stop using it altogether.

Multiple obstacles to the use of more environmentally friendly materials have been identified by packaging decision makers. The cost of materials (cited by 66% of respondents), their availability (44%) and their quality (43%) are the most frequently cited. Promoting cooperation between packaging user industries and suppliers has therefore perhaps never been as crucial as it is today, and ALL4PACK Emballage Paris looks forward to welcoming many of them from 21 to 24 November 2022 at Paris Nord Villepinte.

<https://www.swissinfo.ch/fre/oc%C3%A9ans--appel-%C3%A0-r%C3%A9duire-d-urgence-la-pollution-par-les-plastiques/42852546>

Fact sheet



Mode of
d'administration:
CAWI (online survey)

Target:
ALL4PACK Emballage
Paris community

Response
collection:
11 April to
10 May 2022

Sample:
211 packaging
decision makers



Significant high deviation in a 95% confidence interval

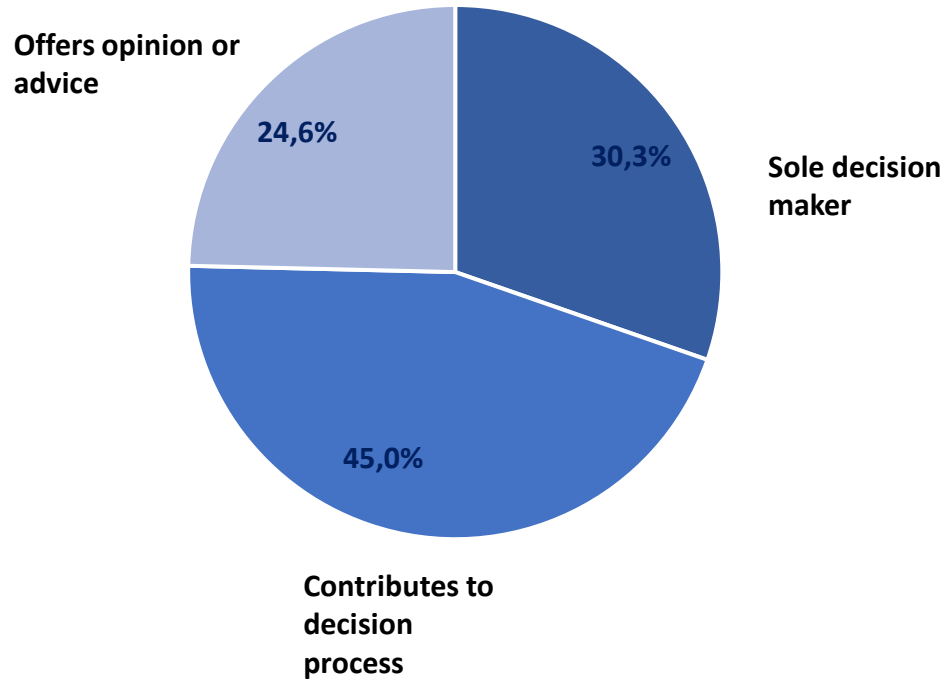


Significant low deviation in a 95% confidence interval

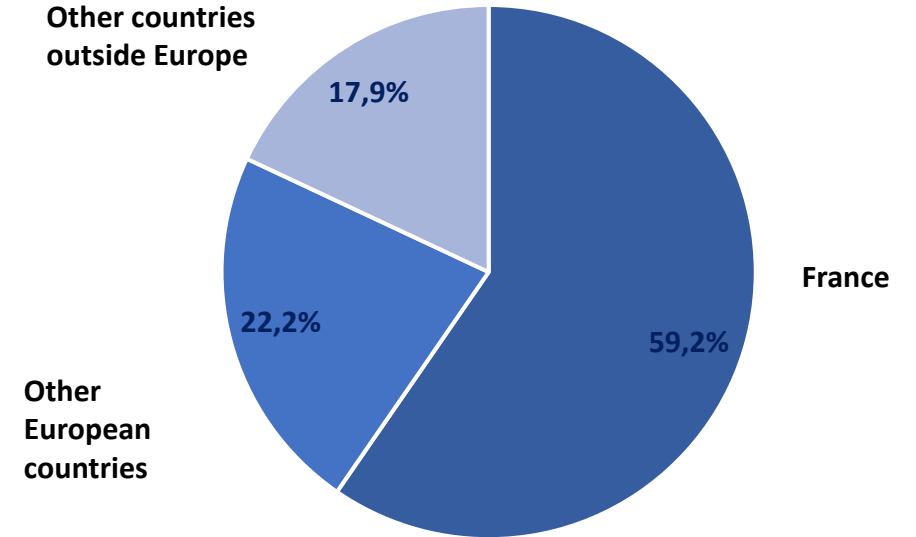
About the sample

Sample – Respondent profile

Level of decision maker for packaging



Countries

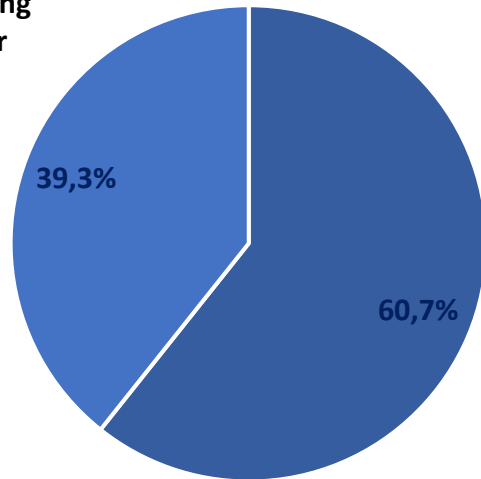


The respondent sample is made up purely of people who play a decision making role in the choice of packaging materials. Half are from France.

Sample – Respondent profile

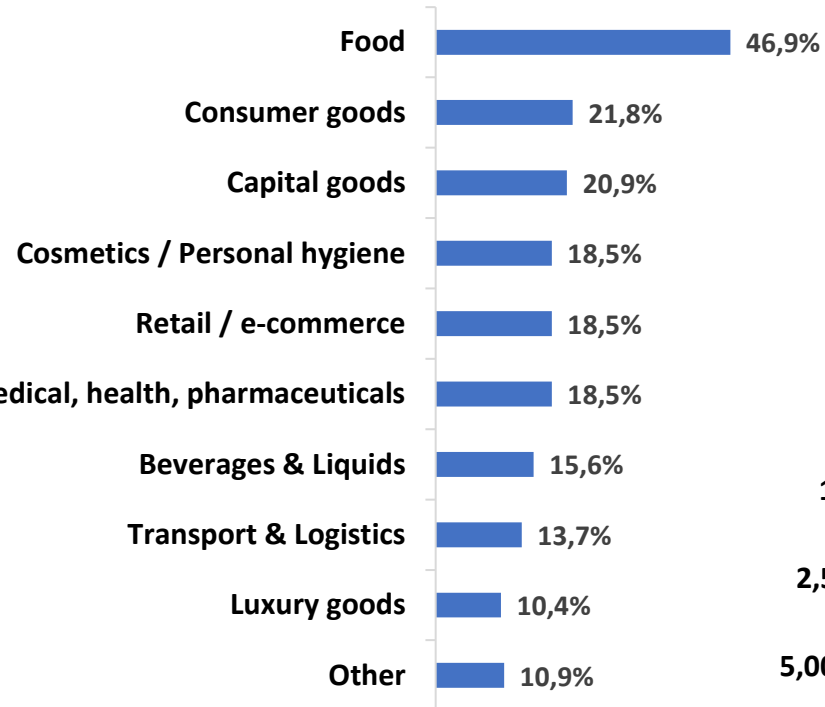
Type of company

Packaging supplier

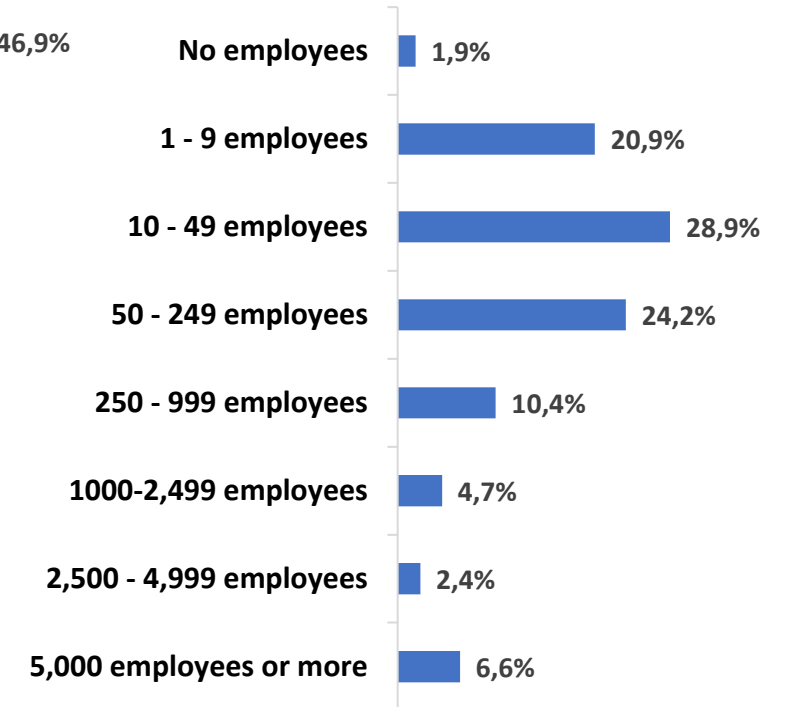


A company that uses packaging (user industry)

Sector



Company size

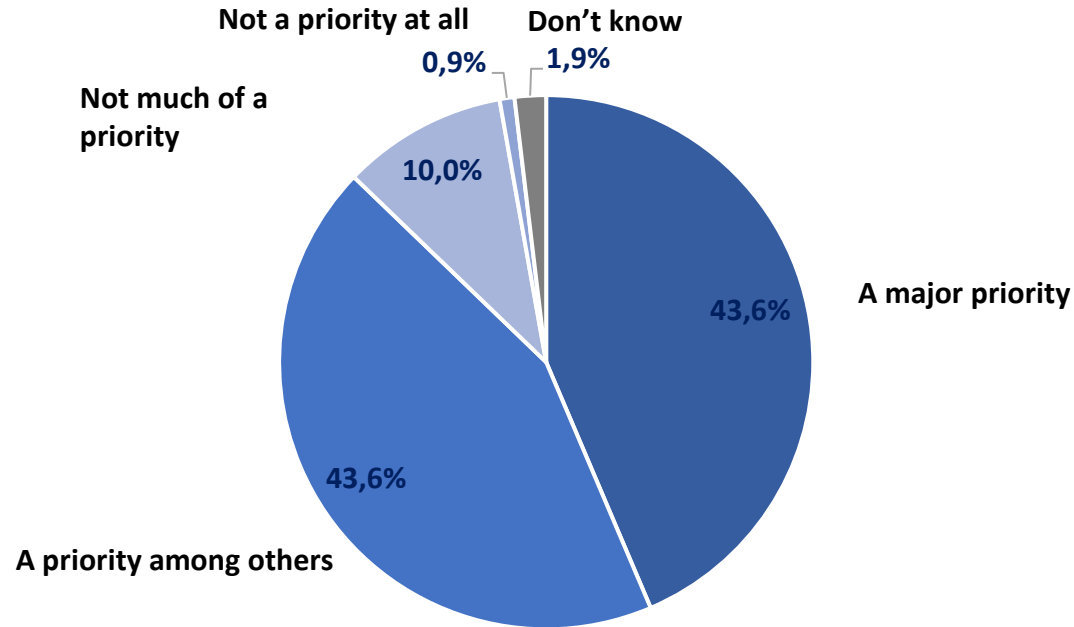


The sample encompasses both user industries and packaging suppliers. The food sector is the most represented, but half of the respondents do not work in food. All company sizes are represented, even if we can note a higher proportion of small businesses.

The vision of the ALL4PACK Emballage Paris community

The importance of the issue of more environmentally friendly packaging

For your company, how would you describe the importance of using environmentally friendly packaging materials?

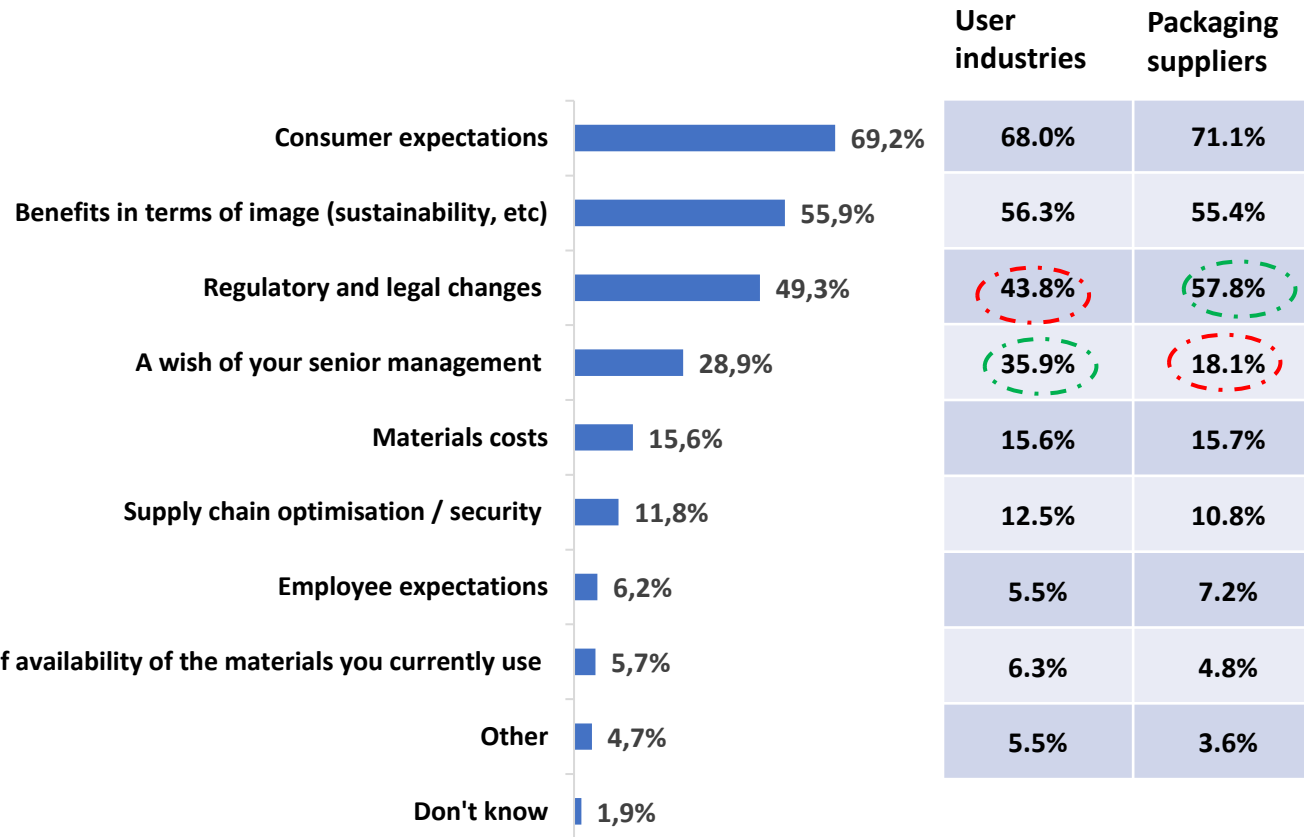


| Seen as a priority: 88% | |
|-------------------------|---------------------|
| User industries | Packaging suppliers |
| 88% | 87% |

The importance of using more environmentally friendly packaging is scarcely in doubt in the view of the members of the ALL4PACK Emballage Paris community. The reasons behind this importance can be found on the next slide.

Reasons for transition towards more environmentally friendly packaging

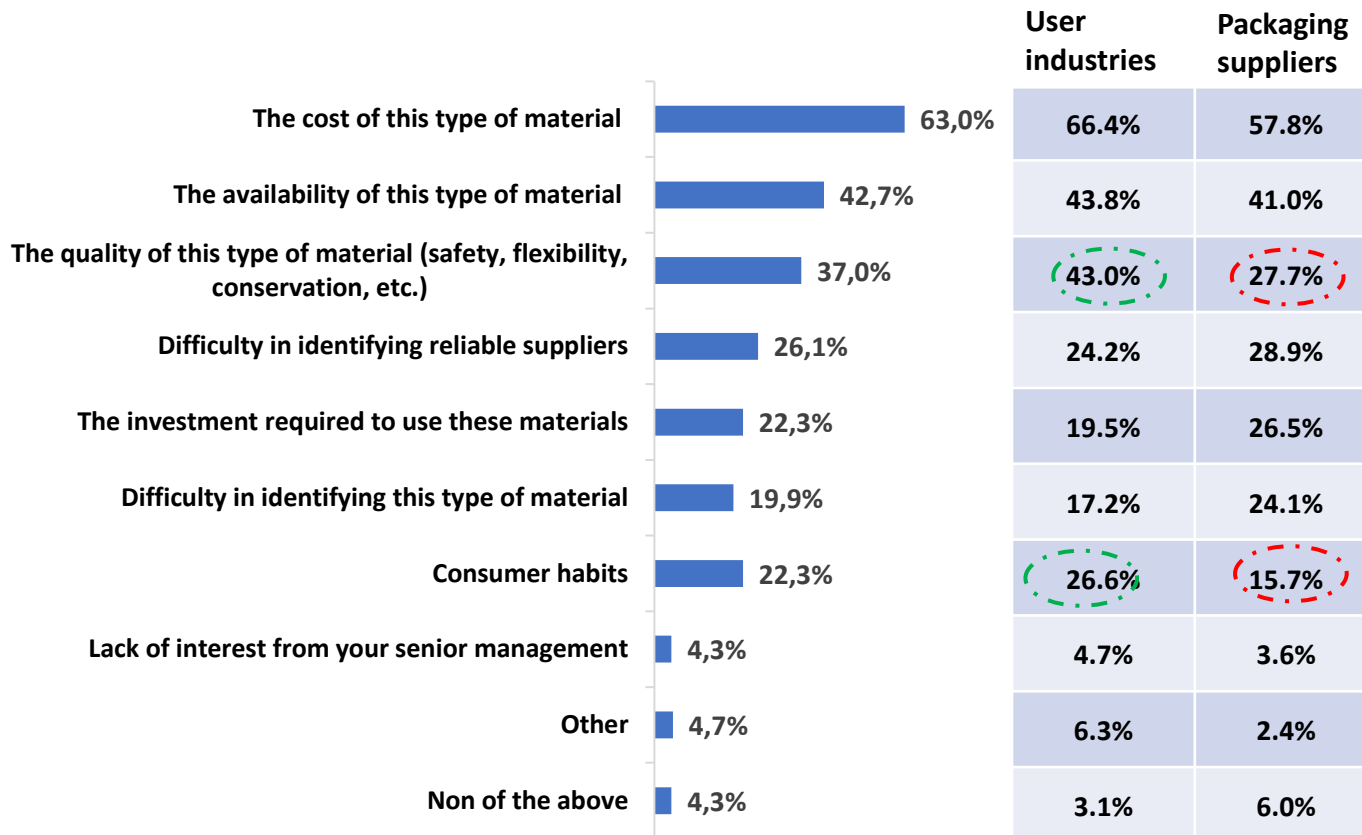
What are the 3 main reasons that would make you / have made you adopt environmentally friendly packaging materials?



Consumer expectations are the leading reason leading firms to adopt more environmentally friendly packaging materials. Regulatory and legal changes also have a major impact, in particular among packaging suppliers.

Obstacles to the transition to more environmentally friendly packaging

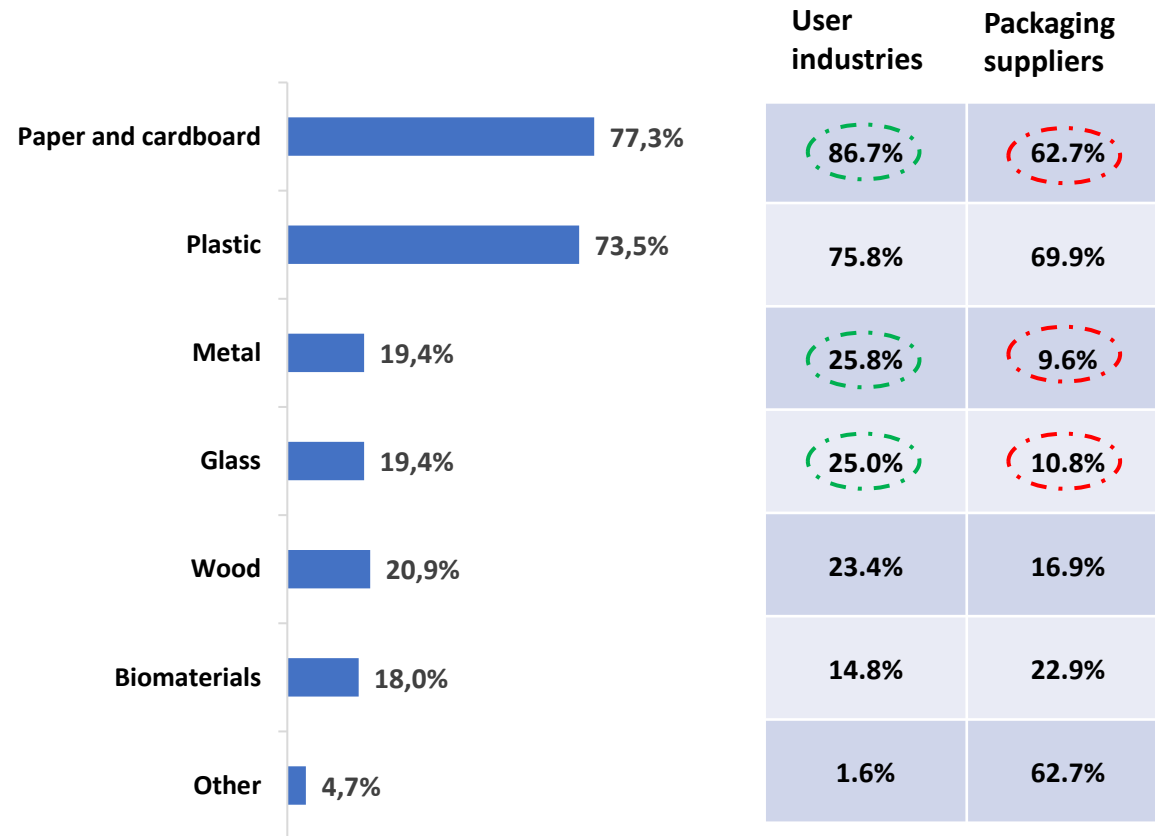
What are the 3 main reasons that might stop you from using environmentally friendly packaging materials?



Cost is the main obstacle to the use of environmentally friendly packaging materials. User industries identify this difficulty more than suppliers. The quality of materials and consumer habits give them more cause for concern.

Types of materials currently used

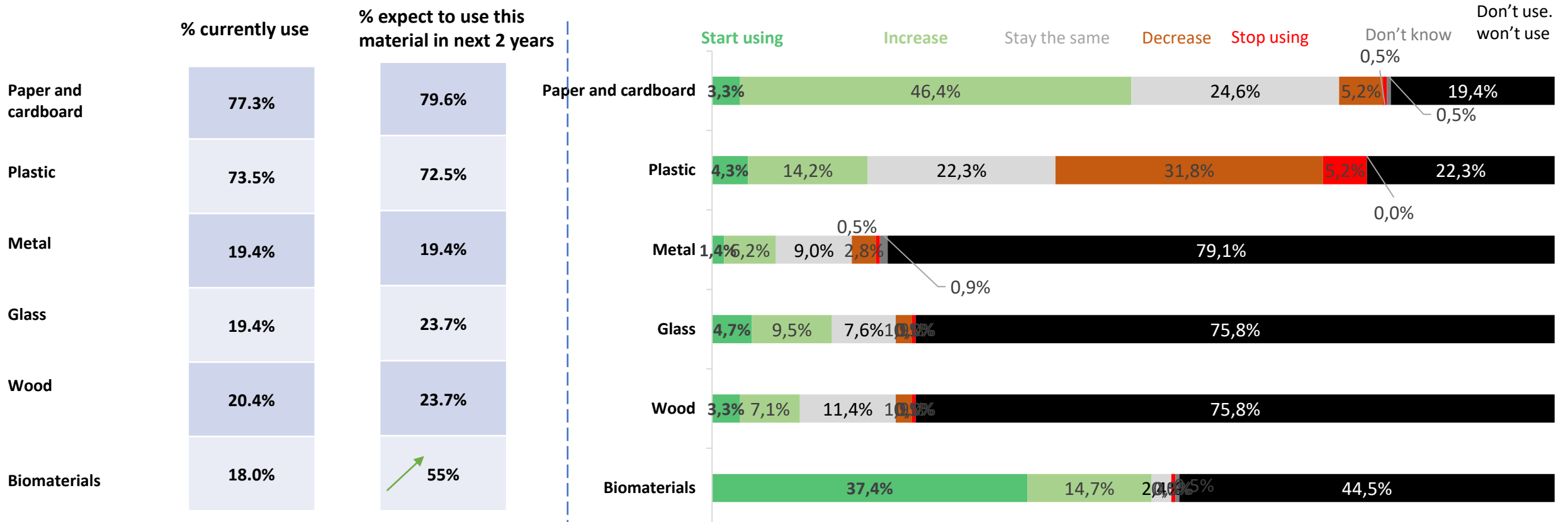
Which of the following type(s) of packaging material are currently used in your company?



Paper-cardboard and plastic remain the main materials used for packaging. Biomaterials are still little used.

Change in types of materials used

And how do you expect the use of these materials to change over the next two years?
In the next 2 years, which materials might your company start to use?

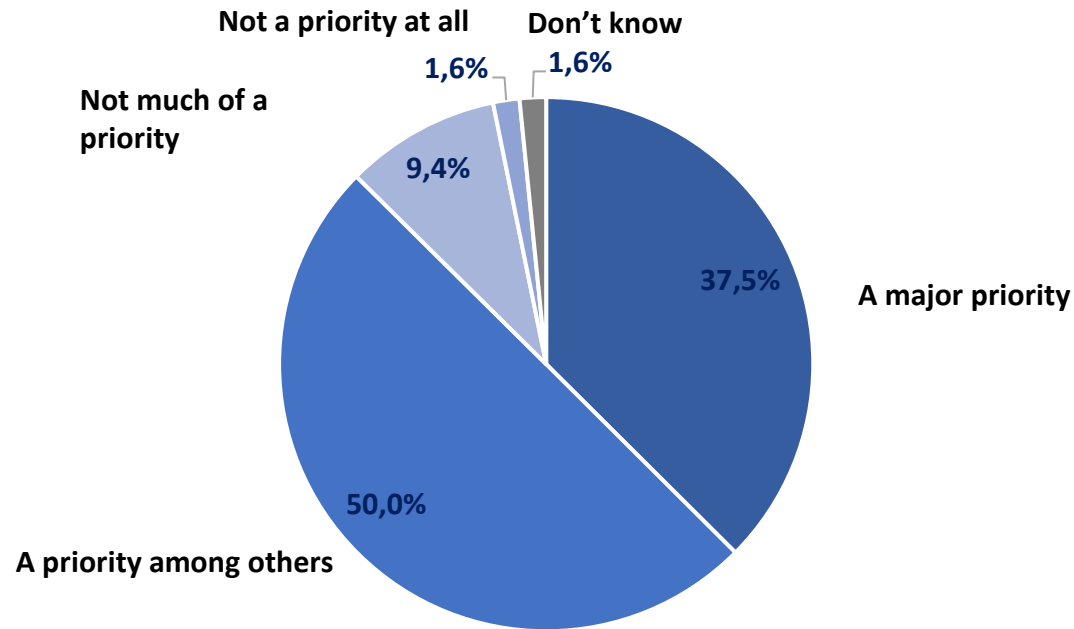


Packaging decision makers appear to have a clear vision of the materials that they will be using in two years' time (very few answer "Don't know"). Many expect to reduce their use of plastic (32%), but few are thinking about stopping using it altogether (5%). In parallel, the use of biomaterials is set to explode (37% expect to start using them). Paper and cardboard should also become more popular.

The vision of user industries

User industries: the importance of the issue of more environmentally friendly packaging

For your company, how would you describe the importance of using environmentally friendly packaging materials?



Seen as a priority: 88%

| France | Other countries |
|--------|-----------------|
| 88% | 87% |

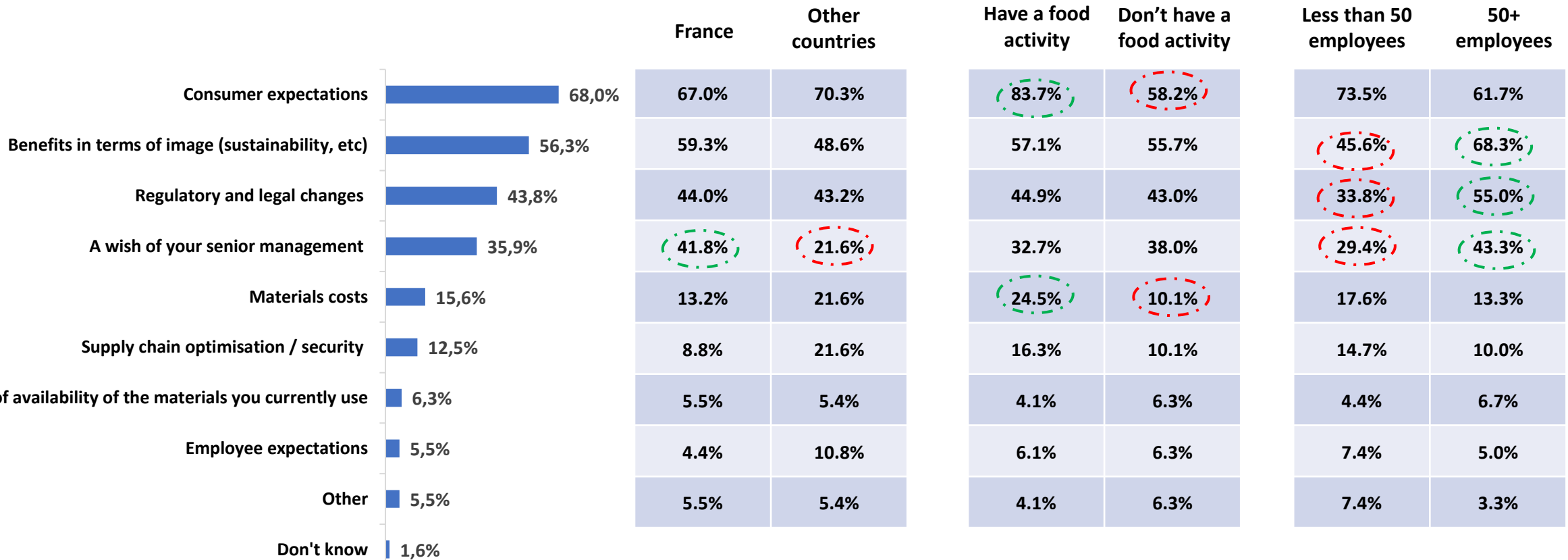
| Have a food activity | Do not have a food activity |
|----------------------|-----------------------------|
| 88% | 87% |

| Less than 50 employees | 50 + employees |
|------------------------|----------------|
| 87% | 88% |

User industries are virtually unanimous on the importance, in their view, of using more environmentally friendly packaging materials. This observation holds true irrespective of country, activity and company size.

User industries: reasons for transition towards more environmentally friendly packaging

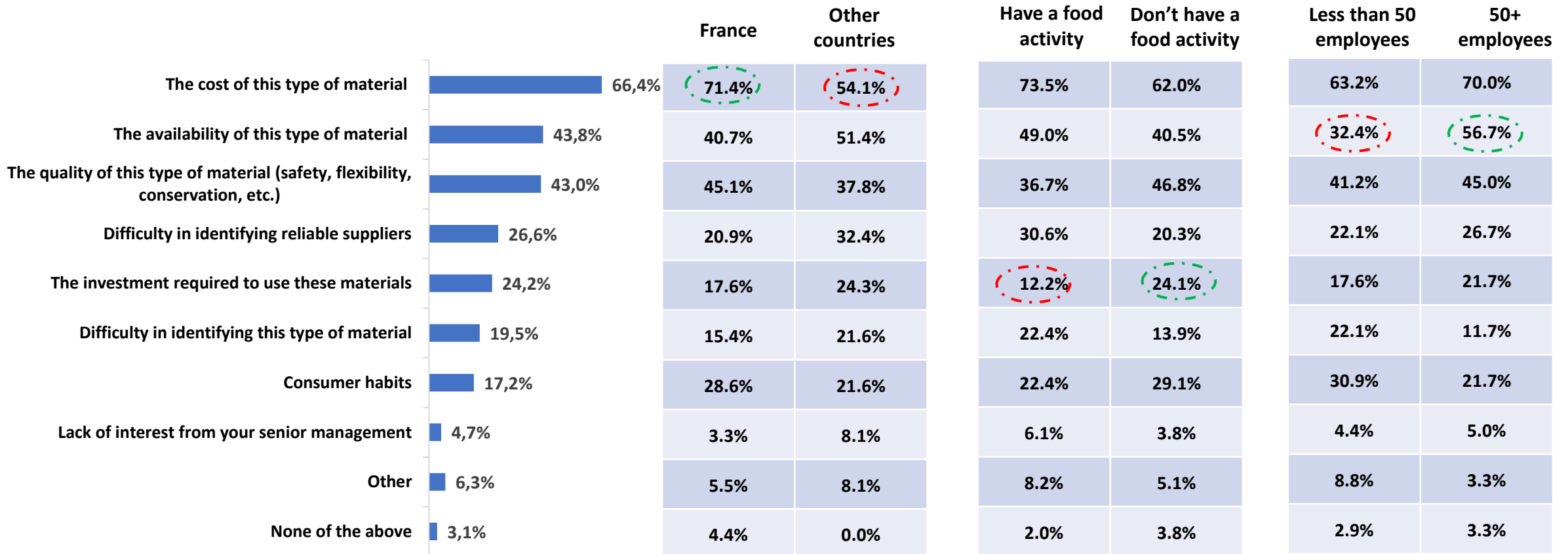
What are the 3 main reasons that would make you / have made you adopt environmentally friendly packaging materials?



Consumer expectations are the leading reason leading firms to adopt more environmentally friendly packaging materials, in particular in the food industry. Benefits in terms of image, regulatory changes and senior management wishes are items that are taken into account, in particular in large firms.

User industries: obstacles to the transition to more environmentally friendly packaging

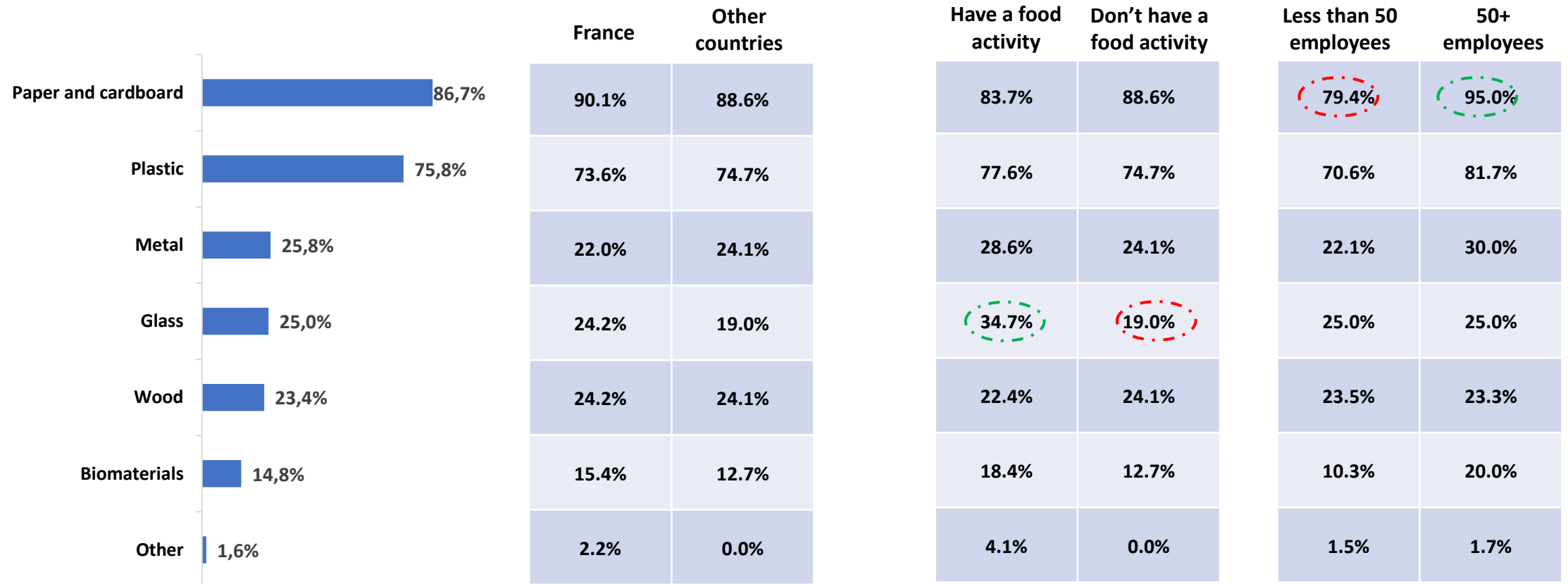
What are the 3 main reasons that might stop you from using environmentally friendly packaging materials?



The main obstacle to the use of environmentally friendly packaging materials is cost, in particular in France. Material availability and quality is also cause for concern for many companies.

User industries: types of materials currently used

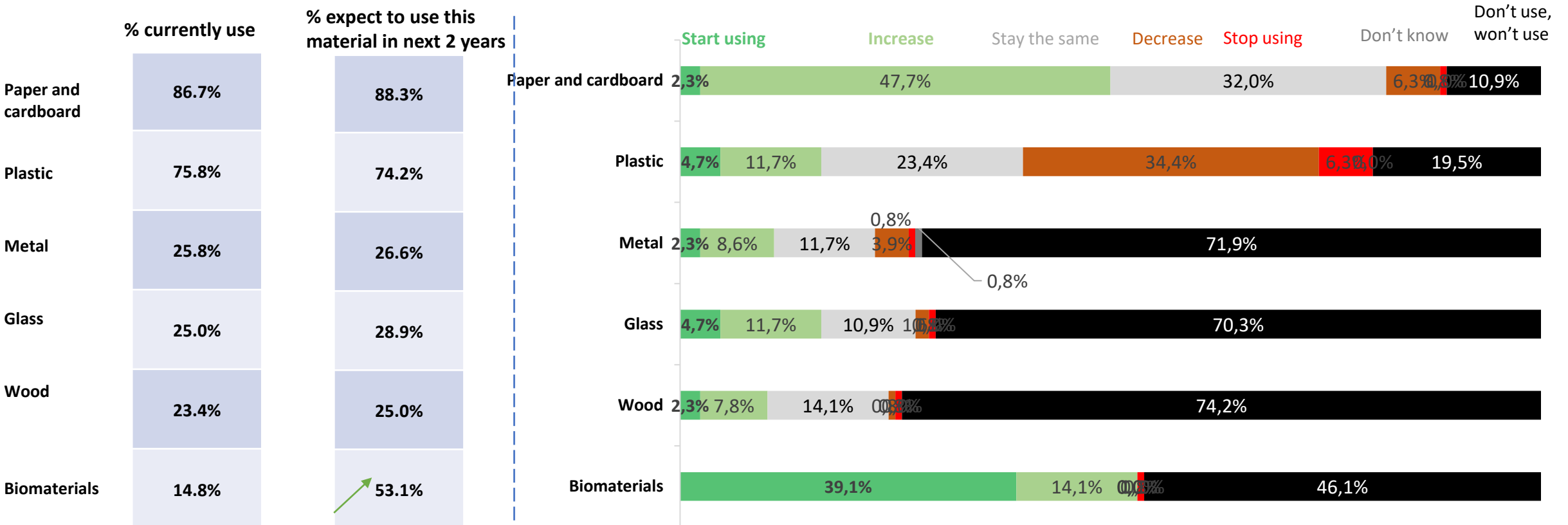
Which of the following type(s) of packaging material are currently used in your company?



Biomaterials are still little used today. Paper/cardboard and plastic remain the norm. It can be noted that glass is today particularly frequently used in the food industry.

User industries: change in types of materials used

And how do you expect the use of these materials to change over the next two years?
 In the next 2 years, which materials might your company start to use?



Many industries expect to reduce their use of plastic (34%), while 74% expect to continue using it. In parallel, the use of biomaterials is set to explode (39% expect to start using them) and paper and cardboard should also increase substantially (48% expect to use more of them).

User industries: change in types of materials used



And how do you expect the use of these materials to change over the next two years?
 In the next 2 years, which materials might your company start to use?

| | France | | Other countries | |
|---------------------|--------------------|---|--------------------|---|
| | % currently use it | % expect to use this material in next 2 years | % currently use it | % expect to use this material in next 2 years |
| Paper and cardboard | 90.1% | 90.1% | 78.4% | 83.8% |
| Plastic | 73.6% | 72.5% | 81.1% | 78.4% |
| Metal | 22.0% | 23.1% | 35.1% | 35.1% |
| Glass | 24.2% | 28.6% | 27.0% | 29.7% |
| Wood | 24.2% | 28.6% | 13.5% | 16.2% |
| Biomaterials | 15.4% | 53.8% | 13.5% | 51.4% |

There is no notable difference between France and other countries.

User industries: change in types of materials used

And how do you expect the use of these materials to change over the next two years?
In the next 2 years, which materials might your company start to use?

| | Have a food activity | | Do not have a food activity | |
|---------------------|----------------------|---|-----------------------------|---|
| | % currently use it | % expect to use this material in next 2 years | % currently use it | % expect to use this material in next 2 years |
| Paper and cardboard | 83.7% | 87.8% | 88.6% | 88.6% |
| Plastic | 77.6% | 77.6% | 74.7% | 72.2% |
| Metal | 28.6% | 32.7% | 24.1% | 22.8% |
| Glass | 34.7% | 42.9% | 19.0% | 20.3% |
| Wood | 22.4% | 22.4% | 24.1% | 26.6% |
| Biomaterials | 18.4% |  51.0% | 12.7% |  54.4% |

With the exception of plastic, all packaging materials are on the increase in the food sector. Greater use of biomaterials should be a general trend.

User industries: change in types of materials used

And how do you expect the use of these materials to change over the next two years?
In the next 2 years, which materials might your company start to use?

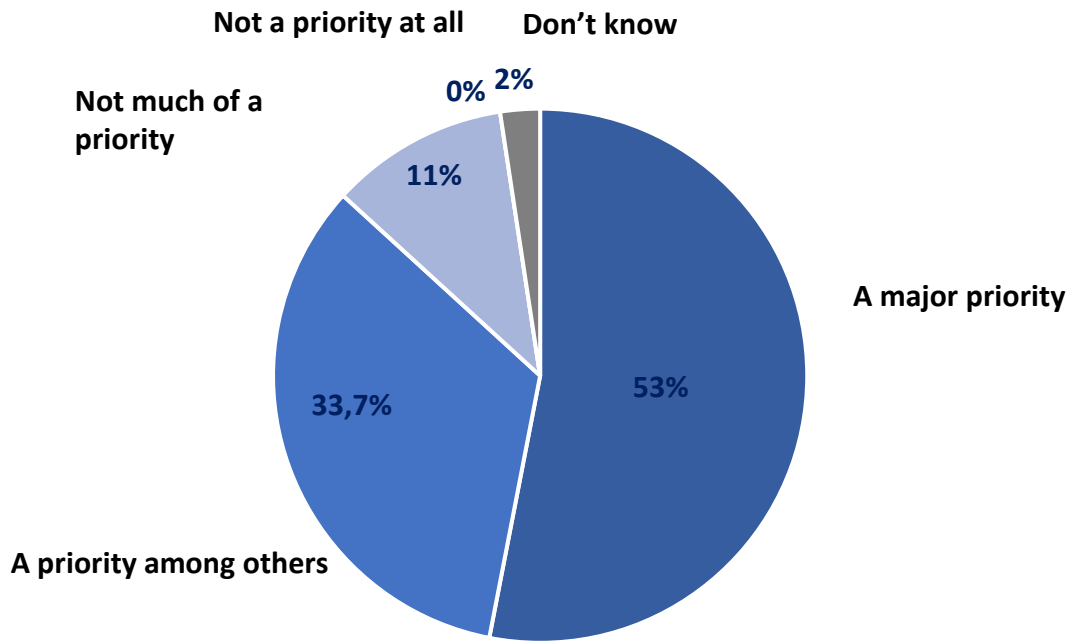
| | Less than 50 employees | | 50 + employees | |
|---------------------|------------------------|---|--------------------|---|
| | % currently use it | % expect to use this material in next 2 years | % currently use it | % expect to use this material in next 2 years |
| Paper and cardboard | 79.4% | 79.4% | 95.0% | 98.3% |
| Plastic | 70.6% | 76.5% | 81.7% | 71.7% |
| Metal | 22.1% | 23.5% | 30.0% | 30.0% |
| Glass | 25.0% | 32.4% | 25.0% | 25.0% |
| Wood | 23.5% | 26.5% | 23.3% | 23.3% |
| Biomaterials | 10.3% | 45.6% | 20.0% | 61.7% |

The use of biomaterials will be particularly accentuated by companies with more than 50 employees.

The vision of packaging suppliers

Packaging suppliers: the importance of the issue of more environmentally friendly packaging

For your company, how would you describe the importance of using environmentally friendly packaging materials?

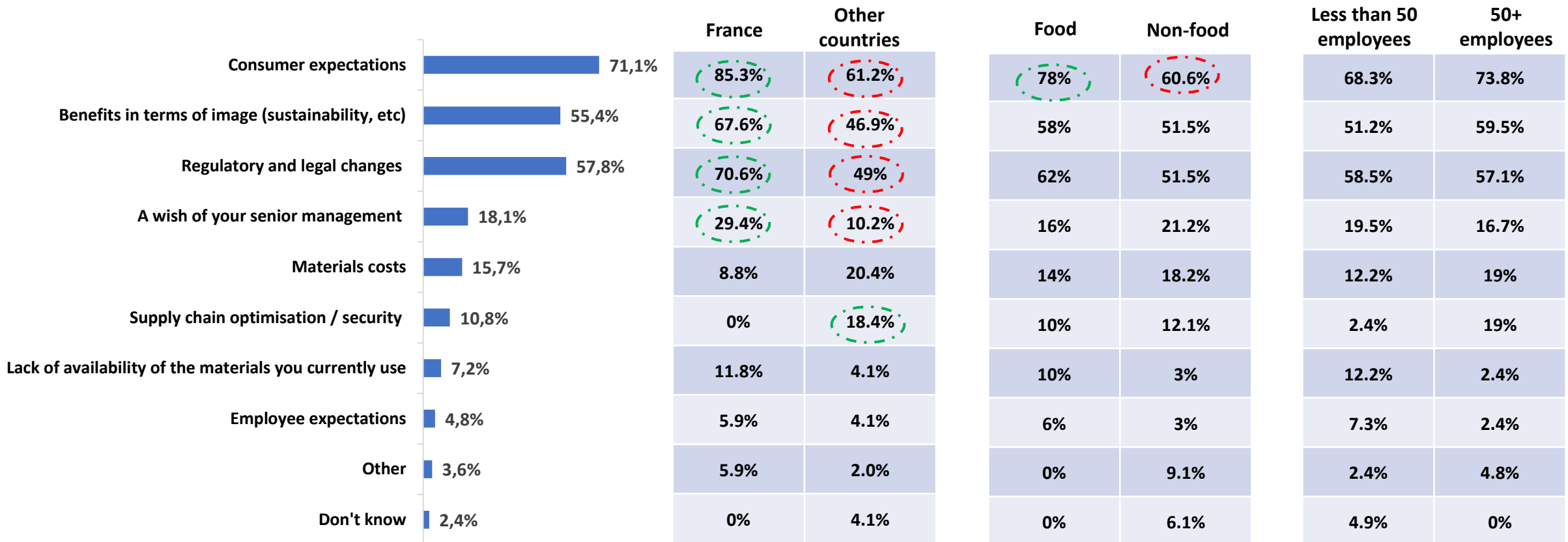


More than half of packaging suppliers believe that it is a major priority to use more environmentally friendly materials. French suppliers appear to be leading the way on the subject.

| Seen as a priority: 86.7% | |
|---------------------------|-----------------|
| France | Other countries |
| 100% | 77.6% |
| Food | Non-food |
| 86% | 87.9% |
| Less than 50 employees | 50 + employees |
| 82.9% | 90.5% |

Packaging suppliers: reasons for transition towards more environmentally friendly packaging

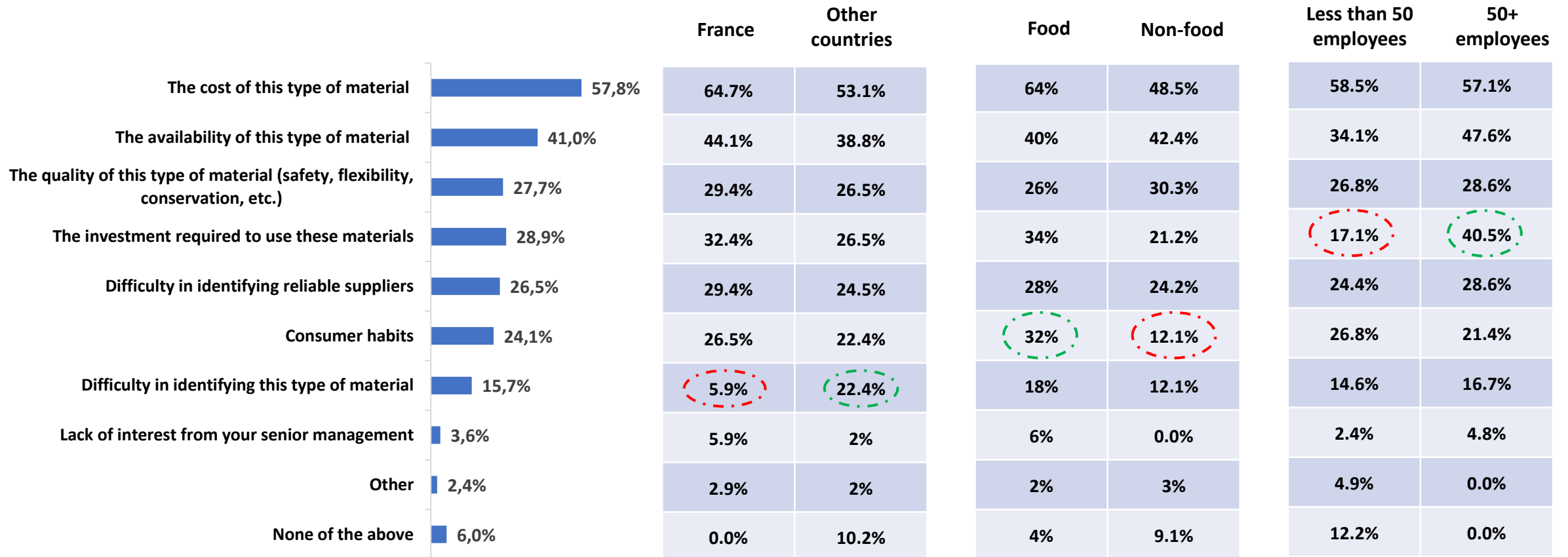
What are the 3 main reasons that would make you / have made you adopt environmentally friendly packaging materials?



For suppliers too, consumer expectations are the top reason to use more environmentally friendly packaging materials. Benefits in terms of image, regulatory and legal changes and senior management wishes are also factors to take into account. French companies cite more reasons on average, but more of them also consider more environmentally friendly packaging to be a priority.

Packaging suppliers: obstacles to the transition to more environmentally friendly packaging

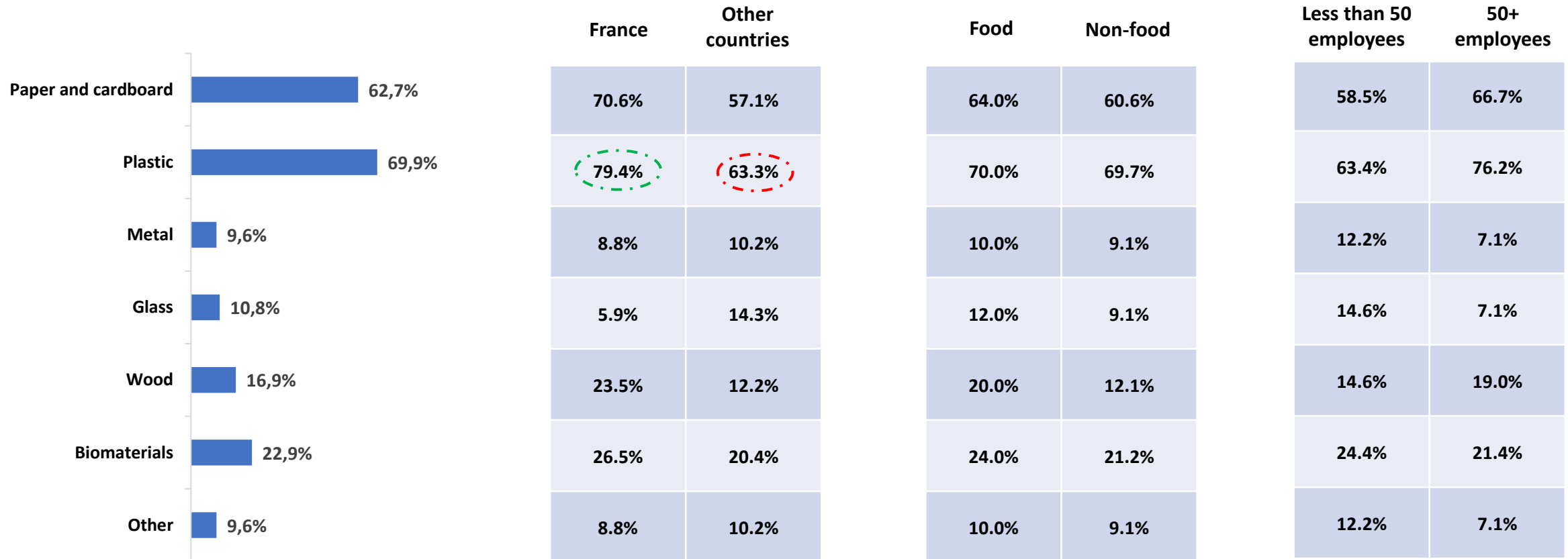
What are the 3 main reasons that might stop you from using environmentally friendly packaging materials?



The main obstacle to the use of more environmentally friendly packaging materials is clearly the material cost, followed by the availability of these materials. **The difficulty in identifying reliable suppliers** is the third obstacle most cited by companies with 50 or more employees.

Packaging suppliers: types of materials currently used

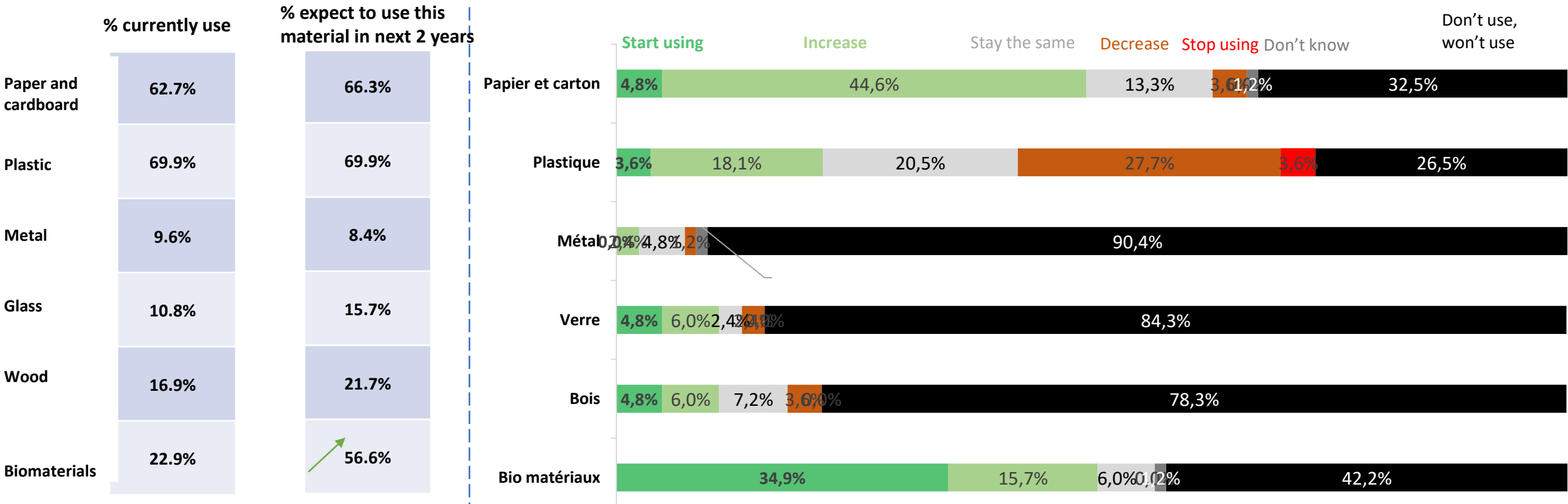
Which of the following type(s) of packaging material are currently used in your company?



There is as yet quite a low number of producers of packaging made from biomaterials compared with suppliers of plastic packaging and paper/cardboard packaging. Little difference can be noted by country, target market or company size.

Packaging suppliers : change in types of materials used

And how do you expect the use of these materials to change over the next two years?
 In the next 2 years, which materials might your company start to use?



Packaging suppliers appear to have a very clear vision of the materials they will be using in 2 years' time (very few "don't knows"). Many expect to reduce their use of plastic (28%), but few will stop using it altogether. The use of biomaterials should become much more widespread. A significant increase in the use of paper-cardboard can also be noted.

Packaging suppliers : change in types of materials used

And how do you expect the use of these materials to change over the next two years?
In the next 2 years, which materials might your company start to use?

| | France | | Other countries | |
|---------------------|--------------------|---|--------------------|---|
| | % currently use it | % expect to use this material in next 2 years | % currently use it | % expect to use this material in next 2 years |
| Paper and cardboard | 70.6% | 73.5% | 57.1% | 61.2% |
| Plastic | 79.4% | 73.5% | 63.3% | 67.3% |
| Metal | 8.8% | 8.8% | 10.2% | 8.2% |
| Glass | 5.9% | 11.8% | 14.3% | 18.4% |
| Wood | 23.5% | 29.4% | 12.2% | 16.3% |
| Biomaterials | 26.5% | 64.7% | 20.4% | 51% |

Variations in France and other countries should be very similar.

Packaging suppliers : change in types of materials used

And how do you expect the use of these materials to change over the next two years?
In the next 2 years, which materials might your company start to use?

| | Food | | Non-food | |
|---------------------|--------------------|---|--------------------|---|
| | % currently use it | % expect to use this material in next 2 years | % currently use it | % expect to use this material in next 2 years |
| Paper and cardboard | 64.0% | 66% | 60.6% | 66.7% |
| Plastic | 70.0% | 68% | 69.7% | 72.7% |
| Metal | 10.0% | 10% | 9.1% | 6.1% |
| Glass | 12.0% | 18% | 9.1% | 12.1% |
| Wood | 20.0% | 26% | 12.1% | 15.2% |
| Biomaterials | 24.0% | 64% | 21.2% | 45.5% |

Nor can any major differences be observed between target markets, even if the biomaterial offering should rise more acutely on the food market.

Packaging suppliers : change in types of materials used

And how do you expect the use of these materials to change over the next two years?
In the next 2 years, which materials might your company start to use?

| | Less than 50 employees | | 50 + employees | |
|---------------------|------------------------|---|--------------------|---|
| | % currently use it | % expect to use this material in next 2 years | % currently use it | % expect to use this material in next 2 years |
| Paper and cardboard | 58.5% | 63.4% | 66.7% | 69% |
| Plastic | 63.4% | 65.9% | 76.2% | 73.8% |
| Metal | 12.2% | 9.8% | 7.1% | 7.1% |
| Glass | 14.6% | 19.5% | 7.1% | 11.9% |
| Wood | 14.6% | 19.5% | 19.0% | 23.8% |
| Biomaterials | 24.4% |  51.2% | 21.4% |  61.9% |

Materials used in packaging do not significantly vary either according to headcount.

**See you from 21 to 24 November 2022
at Paris Nord Villepinte
Exhibition Centre!**

Information and latest news at
all4pack.fr

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ON SOCIAL MEDIA

