

Exclusive findings of the 2016 ALL4PACK Observatory:

**E-commerce, smart packaging and industry 4.0:
the future is now!**



Just a few days before ALL4PACK Paris 2016 gets underway from 14 to 17 November in Paris-Nord Villepinte, the ALL4PACK Observatory presents the findings of its 11th edition. In 2016, for the third year in a row, indicators are all go and indicate promising development prospects for the sector, which continues to be strongly driven by the e-commerce boom. This year, three key trends emerge: the emergence of design as a leading innovation lever; "made in France" approved of by 82% of packaging purchasers; and smart packaging, deemed an important development lever by industry professionals.

These takeaways will be clearly illustrated by the 1,500 French and international exhibitors and during the many debates and talks organised at ALL4PACK Paris.

POSITIVE INDICATORS FOR THE THIRD YEAR RUNNING

- 63% of brands which buy packaging and 62% of packaging manufacturers forecast a medium-term increase in their production;
- 70% of packaging buyers are confident that the price of packaging will remain stable;
- **85%** of manufacturers envisage a stable/upwards development in their operating margins. This view is shared by **86%** of machinery and equipment manufacturers who, despite having less production visibility, are counting on exports to North African countries and North America.

The most optimistic market is still e-commerce and distribution, while the luxury sector has recorded an uncharacteristic decline due to major changes.

THE USE OF DESIGN TO CONTROL COST PRICES, PERFORMANCE AND RECYCLABILITY

64% of brands are working on packaging projects and **50%** are aiming to see results in 2017. For **59%**, development factors are a significant reduction in costs, followed by recyclability/recycling of materials, regulations and standardisation. In this ranking, the fight against waste has moved up from 8th to 4th place. The same three factors take the lead among manufacturers too.

In 2016, general packaging design is the main innovation lever for **51% of buyers**, ahead of practicality/functionality and material recyclability. The focus for the beauty sector is to customise packaging; the health, capital goods and intermediary goods' sectors put emphasis on protection, while e-commerce and distribution are leaning more towards materials as innovation levers.

But at the end of the day, packaging is chosen for its cost price in relation to the product and process and, to equal extents, for its properties and performance.

"MADE IN FRANCE", E-COMMERCE, SUPPLY CHAIN MANAGEMENT: PACKAGING LAYS NEW FOUNDATIONS

- **82% of packaging purchases encourage the "Made In France" label for packaging** (42% get their supplies from France) and 73% do the same for machines (+13 points compared to 2015);
- **41%** of brands have changed the shipping packaging of their products sold via e-commerce and **30%** have modified the primary packaging. To satisfy this demand, **53%** of manufacturers are offering individual bespoke packaging and **47%** are offering new, rigid packaging;
- Manufacturers are continuing to develop their services to manage their customers' stock;
- Machinery and equipment manufacturers are moving towards more maintenance: preventive for **87%** (compared to **83%** in 2015), curative (+13 points compared to 2015) and, in connection with industry 4.0, remote maintenance for **69%**.

ACTIVE, CONNECTED AND INTELLIGENT PACKAGING MUST DEMONSTRATE ITS WORTH

- **42% of purchasers concerned allocate or intend to allocate specific means to developing connected/intelligent packaging.** Among concerned manufacturers, **53%** are doing the same, while **57%** of machinery and equipment manufacturers say that this does not concern them;
- The development of active packaging involves/will involve specific resources for **39%** of purchasers concerned. This will also be the case for **39%** of manufacturers;
- Manufacturers and purchasers think that connected/intelligent or smart packaging is a genuine avenue for progress to improve product safety. This message has not yet been received by **43%** of French consumers questioned by ALL4PACK Paris via ObSoCo¹, who think that this type of packaging is interesting but that its usefulness has not yet been proven.

¹ © European survey carried out on behalf of ALL4PACK Paris – COMEXPOSIUM Group by ObSoCo on a sample of 2,186 people, evenly distributed among the four countries questioned (France, Germany, Italy and Spain). Conducted online from 11 to 24 May 2016.

Created in 2005 by EMBALLAGE, the Observatoire ALL4PACK each year aims to offer insight into this significant French economic sector, offering the entire industry (purchasers, manufacturers and distributors) a valuable chance to anticipate developments in packaging by including in its questionnaire topics reflecting the four complementary sectors of Packaging, Processing, Printing and Handling, with new subject matter suggested by ASLOG² and CISMA³, partners of the show.

The ALL4PACK Observatory provides a snapshot of manufacturers' appraisals of the principal challenges faced by the domestic sector. Administered online in September 2016, this survey yielded 646 responses from:

- packaging user and purchaser industries (78%)
- packaging manufacturers (11%)
- equipment suppliers: manufacturers and distributors of packaging, handling and logistics machinery and equipment (11%).

*Survey conducted for ALL4PACK Paris – Comexposium Group by Goudlink/MRCC.
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See you from 14th to 17th November 2016 at Paris Nord Villepinte!

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² French National Association for supply chain and logistics.

³ Construction, Infrastructure, Steel and Handling Equipment Industries.