Executive Summary

Packaging World magazine partnered with DuPont to identify trends shaping the packaging industry today and in 10 years.

Responses reflect the insights of nearly 500 industry professionals predominantly in Europe and North America working for consumer goods manufacturers and converters in marketing and packaging development roles. Food, healthcare and beverage markets ranked the highest, but nearly every industry that uses packaging was represented.

There was significant alignment in the views of respondents in Europe and North America and throughout the results, the top trends identified as driving today, are predicted to change in 10 years. Trends in the second tier tend to maintain the same level of importance.

Key Findings:

Poised on the brink of change

• Sustainability concerns, ranked behind cost and food safety/security as today’s driving trends, will dominate packaging industry work in 10 years in both Europe and North America.
• Cost, today’s top driver, drops in importance in 10 years.
• Food safety/security remains a top factor driving packaging work.
• Today’s emphasis on “right-sizing” gives way to strategies to use renewable materials, recyclable materials and smart packaging in 10 years – a clear call for innovation and collaboration throughout the value chain.
• Though rarely selected as a “top” trend, convenience factors are identified as very important today – and that importance is expected to be maintained in 10 years.

Maximum value. Minimal Impact.

• The packaging industry believes consumers will have increased value for recyclability and perceived “greenness” of packaging in 10 years – at the same time, demand for proof of sustainability claims will grow exponentially, for instance in the demand for life cycle analysis data.
• Right-sizing packaging in terms of efficient package shape/size, downgauging of package material and minimizing package failures dominate both the North American and European packaging landscape today. Materials play a critical role in these objectives.
• Plastics will continue to replace glass and metals and flexible packaging will continue to replace rigid structures.
Question: Please select the two key trends that most impact your packaging work today and the two trends that you think will most impact the packaging industry ten years from now.

Overall

- Respondents say cost is the top factor driving the industry today (59%) but they predict it will fall significantly in importance in 10 years (dropping 28%) to below factors like sustainability (51%) and food safety/security (37%)
- North American respondents selected performance (40 percent) as the second most important trend, while European respondents emphasized food safety/security (44 percent)
- Future trends in Europe are sustainability (53 percent) and food safety and security (40 percent)
- Future trends in North America are sustainability (48 percent) and cost (41 percent)
- Though they didn’t rank among the top three trends “affordable technology” and “convenience features” held the same level of importance today and in 10 years (30% each in both time periods).

Verbatim Responses:

More than 450 respondents wrote-in their thoughts about the one trend that will most impact packaging in 10 years. Comments about sustainability, cost/affordability and food safety and security dominated. Highlights:

- ‘Affordability. Most all decisions are cost driven at the core and I expect that to become more important as materials and resources become scarcer.’
- ‘Food safety and security. The compliance of the packaging material especially for primary contact with the food is paramount. The customer is becoming vigilant on health (acute, sub-acute and chronic illnesses). The possible chemical migration from the improper packages during different storage can lead to chronic cases. The microbial element is also a point of concern especially from the unhygienic packaging materials. Packages that protect the shelf of the food product together with the health pays.’
• ‘The driver will be food security - better control of chemical, physical and biological contaminants … the ability of the packaging to maintain and extend, if possible the shelf life of food products. The food sector will be the benchmark for pharmaceutical and cosmetics sectors.’
• ‘Versatility. Product life cycles are getting shorter and shorter, this requires creative versatile machines.’
• ‘The sustainability/green agenda will be at the forefront of future trends. As economies re-prosper there will be more onus placed on retailers and brands to deliver a packaging message in response to the ‘all packaging is bad’ momentum.’
• ‘Convenient packaging in single servings. Besides convenience, customers need to purchase at an affordable price, and buying in smaller sized packaging will assist this.’
• ‘Closer cooperation within the value chain to help each partner understand environmental impacts of different packaging alternatives.’

**Question: What trend will most impact packaging ten years from now?**

Many respondents cited **food safety concerns**, with comments similar to the following:

- “We are facing new threats to food safety due to climate change, the failure to address problems in agriculture, lack of food in the world, and finally finding solutions for sustainable approaches.”
- “Continuously evolving legislation and consumer perceptions will drive demand for improved food safety.”
- “In the future I expect food packaging to have a whole new set of environmental and performance requirements. Public awareness will increase and continual improvement of performance will be required.”
- “I foresee sustainability in a new context, where food waste, shelf life all go more together.”
- “Food safety and security will be driven by the increasingly global nature of the food supply chain and threats against it.”
Question: Respondents were asked to agree or disagree with the following statements:

- Regulations will influence packaging design more 10 years from now
- Packaging will play a more important role in a product's success 10 years from now
- Plastics will continue to replace metal and glass packaging
- Flexible structures will continue to replace rigid packaging structures
- Recycling concerns hinder my use of packaging structures containing more than one type of material

Overall
Respondents see:
- A future where packaging plays a more important role and where regulations will play a more influential role.
- Flexible packaging continuing to replace rigid packaging structures.
- Plastics continuing to replace metal and glass.
- Recycling concerns hindering the use of mixed material types in Europe.
Question: When evaluating sustainable packaging, please pick the two criteria you value most today and then in 10 years.

Overall

- Cost matters most (75 percent) when it comes to evaluating sustainability in packaging today, but falls to the third most important criteria (41 percent) overall in 10 years.
- Lifecycle analysis (52 percent) and recyclability of the package (46 percent) will be the two most important criteria overall in 10 years.
- The source of raw materials will become increasingly important (from 20 percent today to 40 percent in 10 years) to tie with cost as the third most important criteria in 10 years.
Question: Please check two packaging attributes you feel are important to consumers today and then two packaging attributes you feel will be important to consumers in 10 years.

**Overall**

- The packaging industry today clearly thinks that consumers value convenience (76 percent) and shelf appeal (58 percent).
- In 10 years, respondents think this dynamic will completely change, with consumers valuing sustainability features, specifically perceived “greenness” of the materials (increasing 23 percent), recyclability (increasing 27 percent) and reusability (increasing 13 percent).
Methodology and Demographics

- Subscribers to both Packaging World Magazine and foodproductiondaily.com were invited to participate in an online survey developed jointly by Packaging World and DuPont Packaging and Industrial Polymers and designed to get an understanding of today’s trends and future trends.
- The survey was open for three weeks in August, 2012 with results analyzed in September. This report was published in October, 2012, with results featured in Packaging World magazine.

Demographics of the respondents are presented below:

Approximately two-thirds of the responses come from EMEA (Europe/Middle East/Africa) and one-third from NA (North America – US and Canada).
- Nearly 40 percent work for a Brand Owner/Consumer Packaged Goods manufacturer and approximately 20 percent work for a packaging manufacturer or converter.
- Most of the respondents report they work in the food and healthcare industries, but a large number of responses come from the beverage, non-food based consumer products groups and the industrial products group.
- Nearly 26 percent report they are in marketing, brand or product management roles and 25 percent report...