

ALL4PACK

EMBALLAGE PARIS

INNOVATION
NEVER STOPS

**PRESS
KIT**

July 2024

**4-7
NOV.
2024**

**PACKAGING
PROCESSING
PRINTING
LOGISTICS**

Paris Nord Villepinte
France

     #ALL4PACK

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Director of ALL4PACK EMBALLAGE PARIS

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EDITORIAL

By Chantal de Lamotte,
Director of ALL4PACK EMBALLAGE PARIS

The packaging sector is undergoing radical change! Faced with a complicated environmental context, new consumer expectations, changing regulations, and more, the packaging universe is reinventing itself.

ALL4PACK EMBALLAGE PARIS (4 to 7 November 2024 – Paris Nord Villepinte) help manufacturers and users to meet this challenge. ALL4PACK EMBALLAGE PARIS is a friendly, modestly sized show that facilitates meetings and business, positioned as the must-attend event in Europe. It is aimed at professionals wanting to discover the best packaging and intralogistics solutions for tomorrow, and the innovations that will shape the future of the sector in a sustainable way. Its positioning, offering and content form a unique whole.

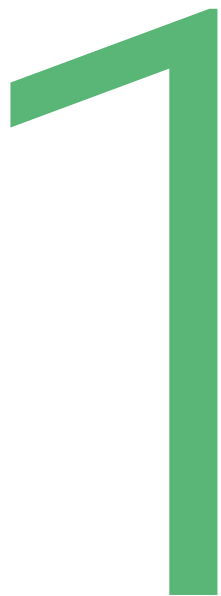


Nearly 1,000 French and international exhibitors will cover every aspect of the packaging chain (Packaging, Processing, Printing, Logistics), including machines in operation, for all industries.

The content of ALL4PACK EMBALLAGE PARIS will once again be comprehensive and focused on innovation and solutions for the future. Particular features are:

- **The ALL4PACK CIRCULARITY space**, to give visitors the opportunity to discover businesses and start-ups working on ways to reduce packaging and resources, on recyclability and the reuse of existing packaging. A number of exhibitor workshops and start-up pitches will be organised in the agora in the centre of this new area.
- **The ALL4PACK INNOVATIONS space**, designed and co-built this year with the EPDA (European Brand and Packaging Design Association). It will present the main packaging trends and showcase the winners of the Innovations Awards 2024 (competition open to all exhibitors and promoting new products from the sectors covered by the show). To illustrate the vitality of creations in this sector, the winners of other partner competitions – Oscar de l'Emballage, SIAL Innovation, De Gouden Noot and Emballé 5.0 – will also be presented.
- **The ALL4PACK CONFERENCES space**, which will be offering a full four-day programme linked to the sector's main challenges, with French and international participants.

More than a trade show, ALL4PACK EMBALLAGE PARIS promises to be a hub of exchange where all actors in the packaging field can be inspired, learn, discover, build strategic relations and find solutions to boost their performance. It is a unique opportunity to dive into the heart of innovation to solve the many issues of today and tomorrow.

A large, bold, green number '1' graphic, positioned on the left side of the page. The top bar of the '1' is angled upwards to the right. The number is set against a background of vertical stripes: a light brown stripe at the top, a light grey stripe in the middle, and a light blue stripe at the bottom.

ALL4PACK
EMBALLAGE PARIS :
THINK OF THE FUTURE!

INNOVATION AT THE HEART OF THE PROPOSITION: "INNOVATION NEVER STOPS!"

The packaging and intralogistics sector is undergoing a number of transformations, influenced by economic, technological and environmental challenges.

ALL4PACK EMBALLAGE PARIS plays the role of a think tank for professionals in the sector, by decoding the innovative aspects of packaging, such as advanced technology, sustainability and the digital transformation.

Through the ALL4PACK CIRCULARITY and ALL4PACK INNOVATIONS spaces and the ALL4PACK Innovation Awards, as well as through the many talks proposed, the event invites professionals to understand, analyse and discuss changes in the sector in view of current and future challenges, while encouraging the emergence of new ideas and solutions.

A Pack Expert Committee to better identify current market expectations

ALL4PACK EMBALLAGE PARIS relies on its Pack Expert Committee, set up to identify and analyse current and future market expectations for packaging.

The committee examines current market trends to define new demands and opportunities in the packaging sector. This includes analysing consumption data, technological innovations, regulatory changes and consumer preferences.

Moderated by Chantal de Lamotte, director of the show, the Pack Expert Committee puts the show at the heart of what's happening in the sector and makes it a source of inspiration by analysing innovations and the main challenges of the sector. Made up of key accounts, packaging user companies and experts, it facilitates concrete exchanges during the preparation of and throughout the show at Paris-Nord Villepinte.

These meetings enable members to discuss various topical subjects and, thanks to their combined expertise, provide the show with a relevant response to current and future concerns, in particular in putting together the conference programme.



The **Pack Expert Committee** is made up of professionals from some of the largest international groups in their sectors:

- **Benjamin BOLLOT** - R&D Senior Scientist Fabric and Home care Packaging Sustainability - **P&G**
- **Philippe BONNINGUE** - Packaging & Circular Economy Stewardship - **L'ORÉAL**
- **Flore BUDIN** - Reuse Project Leader - **CAMELEON GROUP**
- **Valentin FOURNEL** - Eco-design Director - **CITEO**
- **Marie-Pierre GAILLARD** - Packaging Projects Manager - **GROUPE LEA NATURE**
- **Chantal de LAMOTTE** - Director of ALL4PACK EMBALLAGE PARIS
- **Olivier LAROSE** - Sustainable Development Director - **COCA-COLA FRANCE**
- **Jérôme LEROUGE** - Head of Packaging Development - **BEIERSDORF**
- **Jean-Pascal MARTIN FESTA** - Chief Procurement Officer - **RÉMY COINTREAU**
- **Stéphane MERLET** - Packaging Engineer - **FLEURY-MICHON**
- **Fabrice PELTIER** - Expert and consultant in eco-designed packaging
- **Bénédicte ROUCAYROL** - Innovation & Prospective Packaging Manager - **PIERRE FABRE**
- **Benoit TAUSKY** - Packaging Manager Europe - **ECOTONE**
- **Alexandre VERNIER** - Packaging Innovation and CSR Manager - **GROUPE BEL**

EXHIBITION LAYOUT: FOUR SECTORS TO OPTIMISE THE VISITOR EXPERIENCE

The 2024 edition of ALL4PACK EMBALLAGE PARIS will be taking place in hall 5 of Paris Nord Villepinte Exhibition Centre. This location offers the best conditions for welcoming the **40,000 professional attendees expected** (of which 30% from abroad), by distributing flows, in particular thanks to feature areas.

ALL4PACK EMBALLAGE PARIS proposes a comprehensive range of specific, sustainable and responsible solutions for all packaging and intralogistics branches, organised into four sectors: **Packaging, Processing, Printing and Logistics**.

Visitors and exhibitors are invited to discover ALL4PACK EMBALLAGE PARIS to understand the structural transformation of the sector and prepare for the packaging of tomorrow.

• Packaging

The packaging sector is undergoing radical change. Ecological awareness is remodelling the consumer decision-making process, and packaging has to adapt to these new habits. As a showcase for the brand, packaging demonstrates manufacturers' commitments to the ecological transition. It therefore needs to be well planned and take consumer expectations into account in terms of reducing their ecological footprint.

• Processing

At the forefront of technology, the Processing sector is constantly developing. Due to its strategic position in creating finished products, processing is an integral part of the packaging life cycle. It therefore has its rightful place at ALL4PACK EMBALLAGE PARIS, enabling visitors to find innovative and sustainable low-carbon solutions for their specific issues. The show boasts an offering that represents the entire processing branch, including machines in operation.

• Printing

The printing sector is changing at the heart of the technological revolution. It offers numerous new possibilities and economic and environmental constraints that are redefining the framework for all industries. Printing plays a crucial role in the packaging industry, with ever-increasing challenges in terms of communication, awareness and traceability. Whether it concerns product composition,



origin or use, this information is decisive in consumers' purchasing decisions and legislation itself seems to be moving towards greater transparency, which makes the use of labels essential. The role of printing in the packaging chain is therefore secure.

• Logistics

Intralogistics has always been a central link in production and distribution chains, but its importance is growing continually. Managing flows and stocks is not just about keeping pace with changing consumption patterns, but even tends to concentrate a large number of challenges facing the professionals involved. Beyond economic challenges, many other factors play a role in rationalisation objectives. The need to reduce the environmental footprint of the supply chain, the need for flexibility faced with the multitude of ordering and distribution channels, and consumer expectations are shaking up the sector.

Visiting aids:

Two theme-based trails are proposed to discover innovative solutions in the various packaging sectors: the «Pack Machine» and the «Pack Innovation». These two trails will feature a selection of exhibitors to guide visitors in their discovery.

NEW FEATURES AND HIGHLIGHTS

The ALL4PACK CIRCULARITY space

The importance of ecological and environmental challenges, regulations and the influence of citizens is pushing the industry to put circularity and innovation at the heart of its priorities.



ALL4PACK EMBALLAGE PARIS presents ALL4PACK CIRCULARITY, a new space that will spotlight innovative companies and start-ups proposing solutions capable of impacting the entire industrial value chain, including recycling, reuse, eco-design and bulk/loose goods.

To give sustainable innovations and initiatives a showcase, ALL4PACK CIRCULARITY proposes three separate spaces:

- An area dedicated to companies that will be promoting their circular offers;
- A start-up village;
- An agora for speaking opportunities.

Start-ups out in force

A number of start-ups will be exhibiting in the ALL4PACK CIRCULARITY area. Spotlighting these start-ups will help improve their visibility and give them the opportunity to meet investors and user industries that put circularity at the heart of the value chain.



Some of the start-ups already registered:

BAG'INNOV

This small family-run company based in Narbonne is specialised in the flexible stand-up pouch. Bag'Innov proposes a pouch recognised as «Recyclable» by CITEO (France) and Fost + (Belgium), with a volume of 1.5L to 5L, with a tap, compatible for food and non-food contact. Bag'Innov pouches are suitable for hot (83°C) or cold contents, for products with or without alcohol (up to 50°), for food as well as detergents and cosmetics.

"Taking part in ALL4PACK EMBALLAGE PARIS 2024 is a great opportunity to promote our solution, which already meets environmental standards due to come into force in 2030".

Lionel Robert, Managing Director

ECOCERT GREENLIFE

"In view of environmental challenges, Ecocert Greenlife decided to meet the growing demand for sustainable solutions in the materials sector by proposing certifications and guarantees that encourage the adoption of best practice. The Business Unit of Ecocert Greenlife, dedicated to sustainable materials, is mainly focused on plastic materials and offers GRS certification, which guarantees the traceability of recycled materials throughout the value chain while meeting demanding environmental and social challenges".

Sylvana Scampini - Manager of the Sustainable Materials Business Unit

OPACK

The parcel of the future! Reusable up to 100 times and Made in France, it reduces waste by 25 kg and the carbon footprint by 90%, in addition to being more economical than single-use boxes.

What makes it so special? A patented void filler that inflates to protect items in two seconds. *"The ALL4PACK EMBALLAGE PARIS 2024 trade show is the ideal opportunity for OPACK to present its innovative packages and forge strategic partnerships for circular and solidarity-based logistics".*

Chrystelle Peltier, CEO of Opack.

MAGMA TECHNOLOGY

A new generation of visibility system to optimise management of logistics assets. *"The company transforms containers into "smart containers" thanks to its solution combining IoT technology and a Web platform. It provides instant access to inventories and makes it possible to optimise use of equipment thanks to its algorithms".*

Étienne d'OLEON, Sales Director.

PACK ME UP

The French company specialised in sustainable packaging solutions is committed to the environment. *"At ALL4PACK EMBALLAGE PARIS, we will be presenting our fully recyclable bubble wrap made from recycled paper, offering an ecological and effective alternative to protect all types of products during shipping".*

Marjorie BARTHAUX, Sales Manager.

OPOPOP

"Opopop is an expert in reusable parcels for e-commerce. We help companies introduce zero-waste deliveries. At All4Pack we will be presenting our product range and our various services! It's a great opportunity to meet companies ready to get started and other players in the circular economy".

Charlotte Darmet, Co-founder of Opopop.

RELEAF PAPER

"Releaf Paper is the first paper in the world made from dead leaves. We transform green urban waste, collected by towns, into fibre to make packaging solutions: boxes, bags, envelopess".

Alexander SOBOLENKO, Managing Director.

Many other start-ups will also be at the show, including:

- **CILKOA**, logistics services and information systems;
- **MEADOW**, the patented packaging technology by Meadow reuses the most optimised circular infrastructure in the world: the aluminium drinks can. By using what is already available, Meadow offers companies a simple and scalable solution and offers consumers a simple and familiar way of reducing their household waste;
- **PACKITOO** improves the sales cycle for packaging manufacturers, from the acquisition of new prospects to the launch of production orders.

Non-exhaustive list, 18 June 2024



BAG'INNOV
BAG NO BOX SOLUTIONS



OPACK[®]

MAGMA

PACKMEUP
Vos solutions d'emballage eco-friendly

cilkoa
The barrier solution for paper packaging

meadow



packitoo

Releaf
paper

The ALL4PACK INNOVATIONS space

The ALL4PACK INNOVATIONS space is an inspiring and forward-looking hub for packaging trends and a showcase for winners of the ALL4PACK Innovations Awards, offering an overview of the most creative and innovative solutions from the sectors covered by the show.

ALL4PACK INNOVATIONS

In 2022, a total of 24 innovations were selected by the jury, five winners were distinguished, and one special judges' prize was awarded.

This year, innovations will be presented in the following five categories:

- **Industrial efficiency:** rewards innovative machines that meet the new challenges facing the packaging industry.
- **Functionality and use:** rewards innovations that enhance the consumer's experience and use of the product.
- **Recycling:** rewards innovations that put recycling (recyclability, incorporation of recycled materials, easier collection, etc.) at the heart of their product offering.
- **Reduction:** rewards innovations that limit the ecological impact of production and of the packaged product by reducing the use of raw materials and energy.
- **Re-use:** rewards innovations that facilitate the re-use of existing packaging in line with new consumer habits (bulk/loose, deposits, etc.).



The ALL4PACK INNOVATIONS space will also present the winners from other competitions representative of international and European trends: Oscar de l'Emballage, SIAL Innovation, De Gooden Noot, Emballé 5.

Members of the Innovations Awards 2024 jury

The jury, made up of French and international journalists (Belgium, Italy, Netherlands, Poland and Tunisia), who are specialists and experts in packaging and intralogistics, will have to select the most outstanding innovations from the submissions received.



ALL4PACK EMBALLAGE PARIS would like to thank EPDA for its participation in co-building the ALL4PACK Innovations space.



The ALL4PACK CONFERENCES space

The ALL4PACK Conferences space will offer an extensive and complete programme of talks over the four days, linked to the sector's major challenges: environmental, technological and societal, with the new habits of French and international consumers. These presentations will also provide an opportunity to better understand, analyse and decipher trends, future solutions, regulations and new standards.

ALL4PACK CONFERENCES



CONFERENCE PRE-PROGRAMME FOR ALL4PACK EMBALLAGE PARIS 2024 (programme ongoing)

Monday 4 November 2024

- 10:30-11:25 ➤ ALL4PACK EMBALLAGE PARIS 2024 opening talk
- 11:30-12:25 ➤ EPDA talk: How does packaging play a key role in «conscious consumption» - the future starts now?
- 12:30-14:00 ➤ International talk series
- 14:00-14:55 ➤ **Pack Expert Meeting:** "R" for reduction: from weight and volume reduction to the reduction of the number of single use packaging items on the market
- 15:00-15:55 ➤ CITEO talk
- 16:00-16:55 ➤ Talk on primary, secondary, shipping and transport packaging
- 17:00-17:30 ➤ SIAL talk

Tuesday 5 November 2024



- 10:30-11:25 > AGECE law, PPWR, etc. ... from ambitions to application reality
- 11:30-12:25 > Packaging: trends and outlook for 2025
- 12:30-14:00 > International talk series
- 14:00-14:55 > **Pack Expert Meeting:** “R” for re-use, a new world in construction
- 15:00-15:55 > Magazine Packaging Talk
- 16:00-16:55 > CNE talk
- 17:00-17:30 > The challenges of glass: carbon reduction and resources

Wednesday 6 November 2024

- 10:30-11:25 > Eco-design, the environmental indicators to focus on
- 11:30-12:25 > E-commerce talk: from primary packaging to the challenge of the last metre
- 12:30-14:00 > International talk series
- 14:00-14:55 > **Pack Expert Meeting:** “R” for recycling and recycled: from regulatory obligations to normality
- 15:00-15:55 > Wood Packaging Division Talk
- 16:00-16:55 > GEPIA talk
- 17:00-17:30 > Metal talk

Thursday 7 November 2024

- 10:30-11:25 > The third period packaging revolution: the reuse manifesto
- 11:30-12:25 > SECIMEP talk
- 12:30-14:00 > International talk series
- 14:00-14:55 > Data & AI: serving the packaging value chain
- 15:00-15:55 > France Corrugated Cardboard Talk
- 16:00-16:55 > The future of plastic packaging

The free talks are accessible to everyone and are interpreted into French  and English .

EXHIBITION FACT SHEET

ALL4PACK EMBALLAGE PARIS

4-7 NOV. 2024 Paris Nord Villepinte
France

Dates: 4 to 7 November 2024

Opening hours: 9:30 to 18:00 every day, closes 17:00 on Thursday

Venue: Paris Nord Villepinte Exhibition Centre - ZAC Paris Nord 2 - 93420 Villepinte - France

GPS coordinates: Longitude 2°31'06"E – Latitude 48°58'03"N

Frequency: Every two years - Even-numbered years

Date of creation: 1947

EXHIBITORS

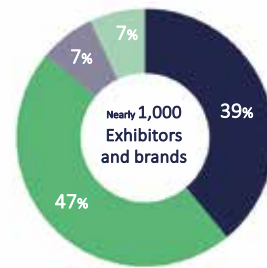
- Nearly 1,000 exhibitors, of which 47% from outside France
- International exhibiting countries (excluding France)

Top 10

-  Italy
-  Germany
-  Spain
-  Turkey
-  Belgium
-  China
-  Portugal
-  Netherlands
-  Bulgaria
-  India

EXHIBITION SUPPLY

- PROCESSING** ■
*Processing and packaging machines
Multi-industries / Branding, coding*
- PACKAGING** ■
*Packaging & Containers for all markets /
Raw materials, consumables / Pavilions*
- PRINTING** ■
Packaging printing, transformations, labels
- LOGISTICS** ■
*Handling / secondary, tertiary and shipping
packaging machines (industry & e-commerce)*



25%
NEW
EXHIBITORS

Nearly 1,000
Exhibitors
and brands

200
MACHINES IN
OPERATION

VISITORS

- 40,000 professional visitors expected in 2024
- 30% of visitors from outside France

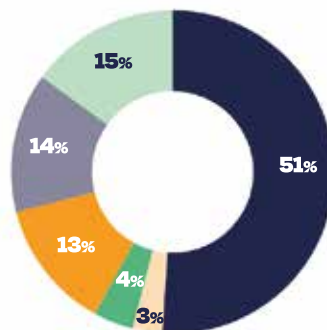
To encourage international business, the **Top Buyers programme** has been extended to 13 countries: Algeria, Belgium, Côte d'Ivoire, Egypt, Germany, Italy, Morocco, Nigeria, Poland, Spain, Tunisia, Türkiye and the United Kingdom.

2022 visitor breakdown

Top 10

-  Belgium
-  Italy
-  Turkey
-  Algeria
-  Spain
-  Germany
-  Tunisia
-  Netherlands
-  United Kingdom
-  Morocco

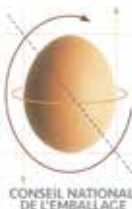
EXHIBITION DEMAND



48%
NEW
VISITORS

- USER INDUSTRIES**
- Engineering / Consultancy / Design offices / IT Services companies*
- Import-Export (8%) / Wholesalers (8%)*
- Design agencies / packaging / communication / advertising*
- Professional organisations / Presse / Education / Training*
- Administration / Public Authorities*

AMONG THE EXHIBITION'S INSTITUTIONAL PARTNERS



EXHIBITION MAP



PRACTICAL INFORMATION

GETTING TO THE SHOW



By air

- **From Paris-Orly airport**
Take the Orlyval to Antony or metro line 14 to Châtelet, then RER B (direction Aéroport Charles de Gaulle), get off at "Parc des Expositions".
- **From Paris-CDG airport**
Take RER line B towards Paris and get off at "Parc des Expositions".
- **From Le Bourget airport**
Take bus 152 (direction Porte de la Villette) at the "Musée de l'Air et de l'Espace" stop to "Jean Jaurès - Division Leclerc", then the RER B (direction Aéroport Charles de Gaulle) and get off at "Parc des Expositions".

ALL4PACK EMBALLAGE PARIS offers discounts on a very wide range of public tariffs on all Air France and KLM flights, up to -15% on international routes. For information, consult the practical information section on the website all4pack.com



By public transport

From Paris, RER line B takes you directly to Paris Nord Villepinte: take the RER B direction Aéroport Charles de Gaulle and get off at "Parc des Expositions".



By road

- **From Paris**
Take the A1 or A3 motorway, then the A104 slip road (direction Soissons). Follow the signs to "Parc des Expositions". (If there is congestion on the A1, get off at Bourget and take the N2, the N370 and the CD40).
- **From Paris Bercy, Orly, A6**
A4 motorway, then A86 and A3 (if congested at the A6 junction, continue to the A104), exit Parc des Expositions.
- **From Roissy and Lille**
Motorway A1 then A104, exit Parc des Expositions.

ACCOMMODATION

ALL4PACK EMBALLAGE PARIS has selected a panel of hotels ideally located close to Villepinte at preferential rates. For information, go to the practical information section on the website all4pack.com

MEDIA INFORMATION

ACCREDITATION FORM

To save time when you arrive at the show, we recommend that you fill in the online accreditation form in advance. You will then receive your badge directly by e-mail.

<https://badge.all4pack.fr/>

THE PRESS LOUNGE IS AT YOUR SERVICE AT ALL4PACK EMBALLAGE PARIS

New location for this 2024 edition! Find us at the heart of the show.

2

TRENDS AND KEY FIGURES

ECONOMIC OVERVIEW OF THE MARKET AND KEY FIGURES

In a complex environment, ALL4PACK EMBALLAGE PARIS provides **an overview of the market to 2025** via a Packaging-Xerfi survey aiming to inform its community.

The survey confirms the key role played by France, leader on the European packaging market, with a **growth forecast from 2020 to 2025 of nearly 2% per year**. It also highlights the state of outlets in the main sectors of the industry (with food and drink accounting for the largest share of the market) and the share of materials used in France (plastic 37.8% and paper/cardboard 31.4%). Finally, a focus on imports and exports underlines the historic result achieved for exports in 2021, at 4.9 billion euros.

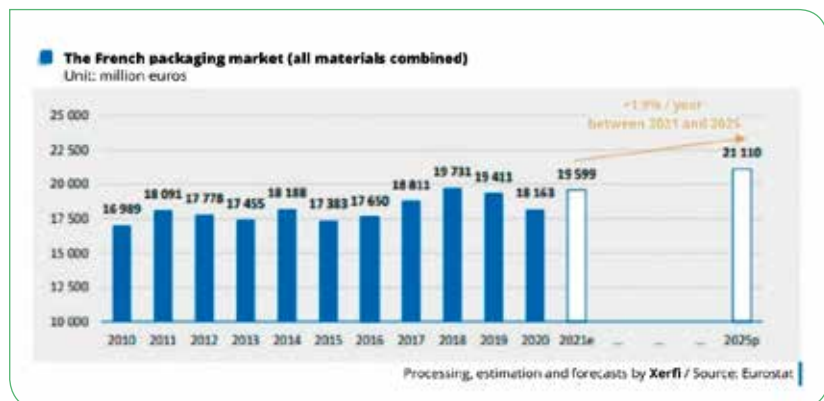
OVERVIEW OF THE FRENCH MARKET

Packaging is omnipresent in our everyday lives: with turnover of nearly €21 billion, it is the seventh industrial sector in France**.

• Growing momentum

In 2021, the French packaging market reached a figure of around €19.6 billion, all materials combined (Xerfi). This is an increase on 2020 and **it should continue to grow until 2025 by an average of +1.9% per year, to reach €21 billion**.

Accounting for 13% of European production, France is therefore the third biggest producer in Europe, behind Germany and Italy*.

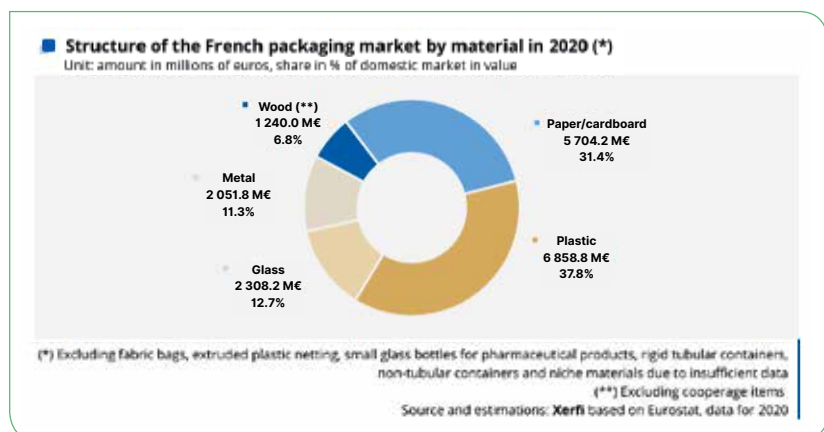


• Outlets in various sectors

The packaging industry's main outlets are in a number of sectors: dry food (36%), beverages (22%), perfumes, cosmetics and cleaning products (15%), pharmaceuticals (5%), and paint, varnish and building materials (10%).

• A market dominated by plastic and paper/cardboard

The French market is dominated in value terms by plastic (37.8%), followed closely by paper/cardboard (31.4%), with wood (6.8%), metal (11.3%) and glass (12.7%) representing a smaller proportion of the materials present on the market.



*Source Focus INSEE, January 2021

**Source BPI France

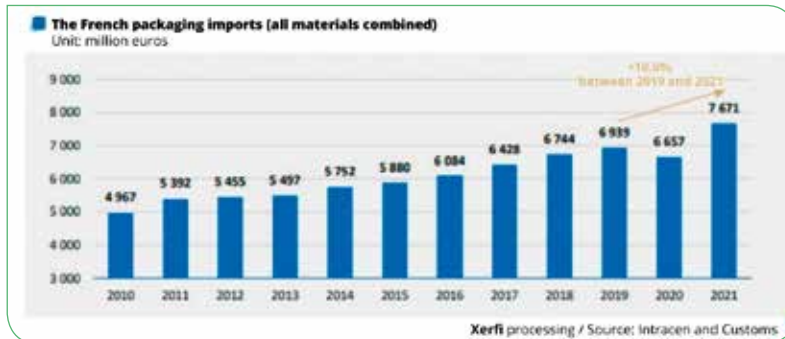
The growth of the French packaging market until 2025 is mainly due to:

- The vigour of the main outlets (food industry, pharmaceutical and logistics industry).
- The evolution towards certain consumer practices (meal delivery, e-commerce, etc.) encouraging the production of food containers (cardboard bowls, lids, bags, etc.) while the boom in e-commerce is a major driver for cardboard producers.
- The increase in packaging prices which is supporting market growth in value terms.

FOCUS ON IMPORT-EXPORT

In 2020, the French domestic market was made up of 36% of imports (in value) and 64% of French production sold in France (excluding exports).

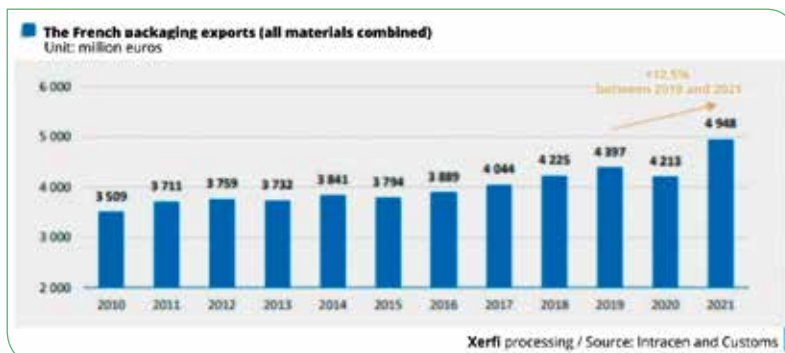
- Imports totalled €7.6 billion in 2021. They have grown steadily over the past decade, particularly for metal and paper/cardboard.
- The ratio of imported packaging sold is particularly high for glass (48%) and metal (50%) (2020). This competition from imported products is less marked in wood and paper/cardboard.



French packaging exports totalled €4.9 billion in 2020, which was an all-time high.

This increase is also due to price increases brought about by the hike in energy and raw material prices.

In 2021, the most exported French packaging was wood at 44.6%, metal at 22.8% and plastic at 16.9%.



PERCEPTION OF PACKAGING IN 2024 BY THE FRENCH AND THE ALL4PACK COMMUNITY

Consumer perception of packaging has considerably changed in recent years, influenced by economic, environmental and socio-cultural factors. Manufacturers are therefore having to push the boundaries and continually innovate by incorporating sustainable practices and take account of ongoing regulatory changes.

In this context, ALL4PACK EMBALLAGE PARIS, the leading exhibition for sustainable packaging and intralogistics solutions, an essential catalyst for growth and competitiveness in the industry, is a genuine source of inspiration. The show spotlights the most responsible innovations, deciphering regulations and market developments.

Today, just a few months before its next edition (4 to 7 November in Paris-Nord-Villepinte), the show wanted to question its community (packaging suppliers and user industries) and consumers via two surveys to draw up a «health report» of the packaging sector in France in 2024.

This confirms the ever-growing impact of environmental factors on consumer choices, who expect alternatives. It also sheds light on the expectations and initiatives of the ALL4PACK EMBALLAGE PARIS community with regard to the trade-offs envisaged to meet environmental, economic and regulatory challenges.

AN ALL4PACK EMBALLAGE PARIS/OPINIONWAY SURVEY (April 24):

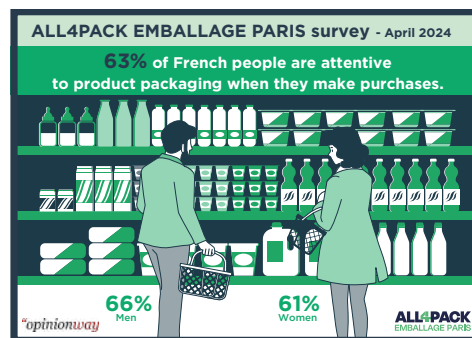
The French and product packaging

1. THE FRENCH ARE ATTENTIVE TO PACKAGING :

The survey's results show that the majority of French people are attentive to the packaging on the products they buy. However, both for packaging and consumption in general, sensitivities in terms of aesthetics, functionality and environmental impact are related to age.

• **Nearly two thirds of French people (63%) are attentive to product packaging when they make purchases (66% of men and 61% of women).**

- ▶ **The practical aspect of packaging** is particularly important for 70% of consumers.
- ▶ **Environmental labels also play an important role:** just over half of French people (55%) read information on the ecological impact of packaging. For women, this number is nearly 57%.



Depending on age, the criteria expressed in terms of impact vary:

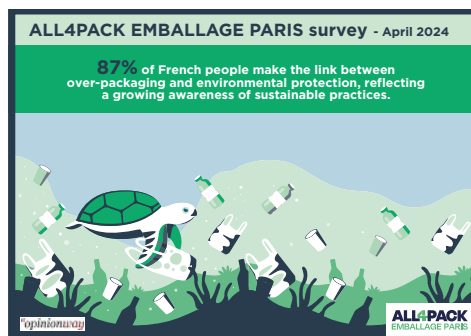
- ▶ The graphic aspect **plays a lesser role for French people over 50**, with less than half (41%) concerned about the **visual appeal of the packaging**.
- ▶ **However, Millennials**, i.e. people under 35 years old, attach greater importance to the **aesthetic dimension** of packaging, with 58% concerned about visual appeal and 56% about design.
- ▶ **Baby boomers**, aged 65 and over, give priority to the **practical aspect** of packaging (76%).

In terms of socio-economic categories, the **ABC1** category pays particular attention to the **environmental information** on packaging: 60% (vs. 57% in lower occupations and 50% among the unemployed).

- **In general, the majority of French people (87%) make the link between over-packaging and environmental protection, reflecting a growing awareness of sustainable practices.**

In addition, two thirds of French people have seen a significant improvement in packaging design in recent years, with a reduction in quantity and a choice of more environmentally friendly materials. Six out of 10 French people note that more and more brands are proposing reusable packaging (58%).

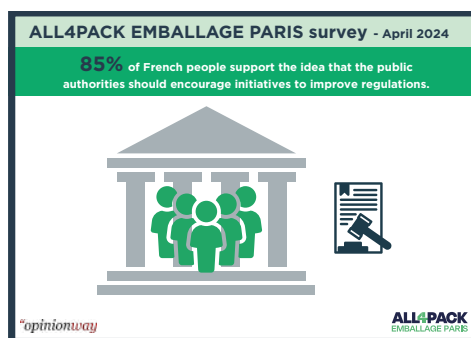
- ▶ **Young French people and families with children are more aware of brands' efforts to offer reusable packaging: 65% of young people** compared to 55% of people over 35, **just like families with children (67% compared to 51% for families without children).**



2. "ECO-CONSCIOUS" CONSUMERS EXPECTING CHANGE:

- The French, who are increasingly eco-conscious, think that packaging plays an important role in protecting the environment and therefore have expectations about this, particularly from the public authorities.

- ▶ **85% of French people support the idea that the public authorities should encourage initiatives to improve environmental regulations for packaging.**
- ▶ **82% often feel that there is excessive packaging** in their everyday purchases, while **79% consider that most of the packaging on products purchased is unnecessary and may deceive the consumer** as to the actual quantity of the products.
- ▶ **However, 67% of people questioned have seen an improvement in recent years** (less packaging, more environmentally friendly packaging) and 58% note that more and more brands are offering **reusable packaging**.



- Nearly all French people (**93%**) expressed the desire to choose **products with environmentally friendly packaging**, whether made from recycled, biodegradable or renewable materials. This desire manifests itself when the product meets their needs, regardless of the brand, and when the cost remains competitive compared to non-ecological alternatives. Each of these criteria received 41% of preferences.

Among them:

- ▶ **16% of consumers are positively influenced by the environmental reputation of brands**, and **14% would be inclined to choose eco-responsible options** if competing products were excessively over-packaged.
- ▶ **21% of French people say that they already give priority to this type of packaging**, whatever the product or brand, demonstrating a deep and practical commitment to sustainable consumer choices.



Depending on age, sensitivity to eco-responsible packaging solutions vary:

- ▶ **27% of people aged 50 and above are more inclined to choose better packaged products if the products are local**, compared to just 19% among those under 50.
- ▶ **Young people are more receptive to alternatives to over-packaged products:** 18% of people questioned under the age of 35 said they would choose such options, compared to 12% of people aged 35 and above.

*Survey conducted by OpinionWay on 29 and 30 April 2024 on a sample of 1,039 people representative of the French population aged 18 and over.

AN ALL4PACK EMBALLAGE PARIS SURVEY (May 24):

Packaging suppliers and user industries, the shared vision of members of the community

Faced with many changes, in terms of consumption and regulations, packaging suppliers are aware of the need to develop their products to meet the expectations of user industries and distributors. This is all the more true given that both they and the user industries agree on the essential role played by packaging in the marketing of consumer goods: **95% of people questioned think that packaging is essential.**

However, numerous criteria should be taken into account, such as production times, the cost of raw materials, compliance with health and safety standards, the product's impact on the environment, etc.

In this context, the ALL4PACK EMBALLAGE PARIS survey, conducted on 248 companies, mostly in France (user industries, packaging manufacturers and distributors), provides a number of insights into the state of mind of the members of this community.

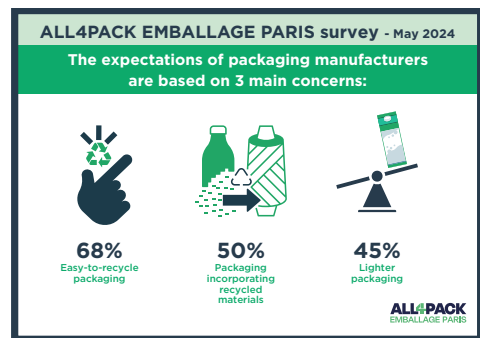


EXPECTATIONS IN TERMS OF TRANSITION

User industries and distributors expect packaging manufacturers to respond to their main concerns:

- **68%** want easy-to-recycle packaging;
- **50%** expressed a preference for packaging containing some recycled materials;
- Finally, **45%** want lighter packaging.

In addition, 46% of those questioned want functional innovations and greater practicality, while 38% want innovations to minimise waste by providing better information on use-by dates.



PLASTIC IN QUESTION

The majority of the ALL4PACK EMBALLAGE PARIS community is aware of the need for a transition and is questioning the use of plastic in terms of its environmental impact and envisaging more sustainable alternatives:

- **65%** of manufacturers and distributors questioned want packaging manufactures to offer alternatives to plastic;
- **54%** of manufacturers say that the use of plastic should be reduced in the next two years, thanks to innovations and possible substitution by other materials;
- **60%** think that the use of recycled plastic or bio-sourced plastic will be omnipresent and **44%** are moving towards fibre composites containing less and less plastic.

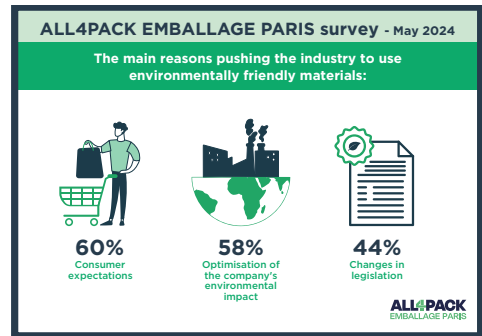
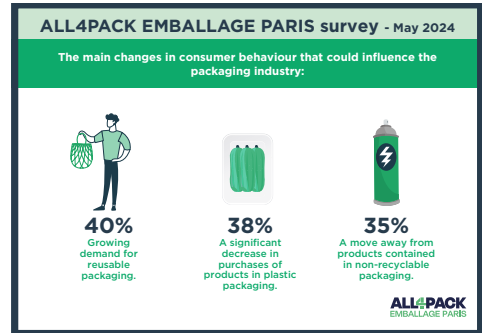
MULTIPLE INNOVATION FACTORS

Among the factors driving innovation, changes in consumer behaviour can have an undeniable impact on the industry:

- Growing demand for reusable packaging (**40%**);
- A significant decrease in purchases of products in plastic packaging (**38%**);
- A move away from products contained in non-recyclable packaging (**35%**).

In addition, faced with environmental issues, the packaging industry says it has several sources of motivation to use environmentally friendly packaging materials:

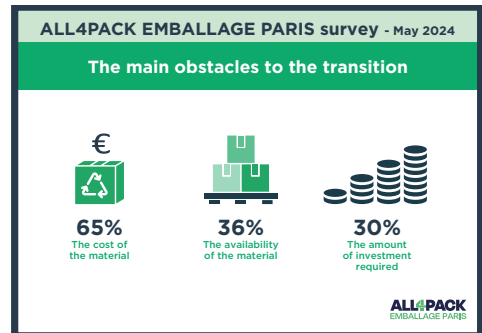
- Consumer expectations (**60%**);
- Companies' objectives to optimise CSR impact (**58%**);
- Changes in legislation forcing them to do so (**44%**).



OBSTACLES ON THE PATH TO TRANSITION

Despite their desire to reduce the use of plastic in their solutions, user companies, distributors and packaging manufacturers are faced with three main obstacles:

- The cost of the material (**65%**);
- The availability of the material (**36%**);
- The amount of investment required (**30%**).



More information on request.



THE VIEW OF FABRICE PELTIER, EXPERT AND CONSULTANT IN PACKAGING ECO-DESIGN

TWO SURVEYS THAT PUT PACKAGING BACK IN ITS RIGHTFUL PLACE!

On the consumer side:

While most surveys on the perception of packaging focus on its “conflicting” link with the environment, the one conducted by OpinionWay in April 2024 on a sample of 1,039 people representative of the French population over the age of 18, shows it from a different angle.

PACKAGING MUST BE PRACTICAL ABOVE ALL ELSE

While nearly two thirds of French people (63%) pay attention to product packaging when they make their purchases, they are particularly concerned about the practicality of the packaging (70%). Environmental labelling is only considered by just over half of French people (55%).

However, the vast majority of French people (87%) make the link between over-packaging and environmental protection, reflecting growing awareness of sustainable practices.

CONSUMERS ACKNOWLEDGE MANUFACTURERS' EFFORTS

Two thirds of French people (67%) note a significant improvement in packaging design in recent years, with a reduction in quantity and a choice of more environmentally friendly packaging, and nearly six out of 10 (58%) observe that more and more brands are offering reusable packaging.

LESS PACKAGING AND MORE REGULATIONS

A high proportion (85%) express a desire to see less packaging in their everyday purchases and think that the public authorities should encourage initiatives that aim to improve environmental regulations for packaging (85%).

On the manufacturer and retailer side:

For the 248 companies in the ALL4PACK EMBALLAGE PARIS community questioned, packaging is at the heart of their concerns when they launch a consumer product (95%).

PACKAGING MUST BE ECO-DESIGNED

Easy to recycle (68%), incorporating recycled material (50%), lighter (45%) to meet consumer expectations (60%) and to optimise the company's environmental impact (58%), well ahead of legislative changes (44%), which are mostly seen as adequate by manufacturers.

LESS PLASTIC, BUT ABOVE ALL, A DIFFERENT PLASTIC

The use of plastic in the packaging industry is set to decline in the next few years (54%) due to consumer disenchantment. Two trends towards a different kind of plastic are taking shape: recycled or bio-sourced plastic (60%), fibre composites with less plastic (44%).

THE MAIN OBSTACLES TO THE TRANSITION

The cost of more environmentally friendly materials comes out top (65%), far ahead of availability (36%) and the amount of investment required (30%).

REUSABLE PACKAGING IS JUST AHEAD OF RECYCLABLE PACKAGING

The main changes to meet consumer expectations in the future would be an increased demand for reusable packaging (40%) and a move away from products packaged in non-recyclable packaging (35%).

ALL4PACK

EMBALLAGE PARIS

INNOVATION
NEVER STOPS

About ALL4PACK EMBALLAGE PARIS

An international generalist trade show held every two years, ALL4PACK EMBALLAGE PARIS is a true reference in the Packaging and Intra-logistics eco-system. Today, the show's mission is to support professionals in responding to an unprecedented revolution and rising to the new ecological challenges that they are facing. To do so, it brings together all the innovations, trends, and expertise at the service of user industries. It offers a global approach for specific, sustainable, and responsible solutions to the performance issues of professionals in the sector: packaging, machines, logistics. This unique exhibition brings together the top decision-makers from 11 industrial sectors: Food, Beauty & Hygiene, Consumer Goods, Capital Goods, Beverages & Liquids, Distribution and e-commerce, Luxury goods, Pharmacy & Health, Services, Transport & Logistics, other multi-industries...

In 2022, the show played host to 1,100 exhibitors of which 51% from outside France, and 45,000 professionals, of which 32% from abroad.

More information at: www.all4pack.com

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