

FEATURING THE

ONE OF 100

SUMMIT

Global Brands Have Partnered
in Loop™ Coalition
A Possible Waste Free Future
TerraCycle

Omni-channel Packaging
Designed for
Delighting Consumers
Procter & Gamble

POS to MOS:
The Big Shift
sgsco

Showcasing the
PAC Global
Leadership Awards

Revealing the
Finalists

Also a look into the
Transcontinental
Transformation

Ethical Living Towards
A Circular Economy
Nespresso

connect 2019

Connecting You to What's New & Exciting in Packaging

PAC CONNECT is a PAC publication



~~Where~~ *How* are consumers engaging with your brand?

Digital disruption is rapidly shifting the narrative from brands winning WHERE the consumer makes their purchase decisions (Point of Sale), to HOW consumers are making their purchase decisions (Moment of Sale™). In this new world, the package and its associated digital art files take on an even greater level of importance to help companies deliver better, faster and leaner omnichannel solutions into the marketplace.

Learn more about sgsco integrated solutions for omnichannel package design and digital graphics.

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COURAGE AND LEADERSHIP

Purpose and innovation driving brand competition in digital era

As today's Millennials and Generation Z continue to accelerate the changes in the way we shop, what we eat and how we live, the whole narrative of what brands must deliver to modern-day consumers has undergone profound transformation in a very brief time frame.

Gone are the days of purchase patterns being influenced by demographics alone. Millennials and Generation Z are consuming in the unprecedented new age of technology disruption, where decisions are being made not solely by price, but by personal alignment with brands and their visions.

Beyond the path to purchase, these new consumers are publicly documenting their journey with products on the world stage through their social media streams—constantly challenging CPG (consumer packaged goods) brand-owners on their impact and reach.

With new concepts such as circular economy, zero plastics waste, omnichannel retail and asset digitization now part of everyday conversation in the packaging industry, retailers and brand-owners are deploying dedicated rapid response teams that seem to innovate at the speed of light—showing courageous leadership in their quest to stay relevant.

In this light, we are proud to present the second annual edition of our **PAC Connect** magazine—featuring PAC member thought-leaders providing their insights on relevant industry issues.

Our cover this year features the Roxy Hotel Theater, in the Tribeca neighborhood of New York City, where we will host our *ONEof100 Summit* on February 26, 2019. (It's not too late to book a ticket!)

Now in the fourth year of our **PAC Global Leadership Awards** competition, we are thrilled to be staging our showcase of breakthrough packaging innovation in New York City—the true epicenter of FMCG (fast-moving consumer goods) manufacturers and their brand agencies.

To that end, we have created the *ONEof100 Summit* not just as an occasion to celebrate these winners, but also to educate our audience about the dynamic changes impacting the value chain of the packaging sector—in hopes of inspiring attendees with answers and insights into some of the most difficult questions facing brands today.

More than ever before, PAC remains steadfast in our goal to continue to innovate and grow our offerings for members. Events like *ONEof100*, and our annual awards celebration, present a unique opportunity for our members from across the value chain to come together and build critical relationships.

Kicking off the summit, fresh from his high profile announcement with several prominent global brand CEOs at last month's World Economic Forum in Davos, Switzerland, is Tom Szaky, a brilliant millennial thought leader who is arguably one of the most creative waste management experts of our time.

Founder of the world-renowned upcycling pioneer **TerraCycle**, Szaky will talk about his latest disruptive reusable

packaging initiative called Loop—a circular shopping platform that transforms the packaging of your everyday essentials from single-use disposable to durable, feature-packed designs.

Already, Loop has drawn references to being “the milkman reimaged,” honoring our past from a modern perspective by championing a sustainable approach to packaging—with a distinct vision of partnering with the world's biggest brands to reduce packaging waste.

Also making an appearance at *ONEof100*, and featured in the pages of this year's *PAC Connect*, are packaging experts from **Procter & Gamble (P&G)**, the recognized leader in CPG innovation who will discuss their game-changing sustainable package innovations targeted at the e-commerce buyers.

With the conversation no longer limited about how the consumer products perform on traditional store-shelves, there is an urgent imperative for new unique approaches to positioning products for a digital landscape serving the fast-growing online audience.

To that end, prominent thought leader Aidan Tracy of *sgsco* will discuss his insights on the unfolding ‘Big Shift’ from Point of Sale to Moment of Sale mindset. As the path to purchase has changed and prominent brands are finding out the hard way that focusing on producing state-of-the-art packaging for store shelves is no longer enough, brands must act quickly to devote more resources to the e-commerce world, where physical store shelves are no longer the critical point-of-sale.

With this year's edition, we have also endeavoured to showcase the type of leadership required in this new era with an ever-changing consumer landscape. Brands like **Nespresso**, focused on ethical living, and **TC Transcontinental**, a company that has undergone a transformation from being Canada's largest printer to becoming a North American leader in flexible packaging, show the importance of courage, commitment and collaboration to attain successful brand leadership in 2019.

As a parting note, I would like to extend sincere gratitude to our wonderful event and publication sponsors, without whom none of this would have been possible.

To that end, a big ‘Thank You!’ to platinum *ONEof100 Summit* sponsor, **sgsco**, and silver sponsors, **Atlantic Packaging Products Ltd.** and **Cambridge Label Inc.**

We also hope you enjoy the cover design created by **Anthem**, as well as the considerable effort by the **Canadian Packaging** magazine for producing and distributing the *PAC Connect* publication for our great PAC members.

James D. Downham,
President & CEO,
PAC Packaging Consortium



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IN THE LOOP

TerraCycle does it again!



Consumer goods stalwart leveraging cutting-edge packaging innovation to fuel rapid sales growth in burgeoning online retail markets

BY GEORGE GUIDONI, EDITOR

If being able to translate consumer desires into new products lies at the core of genuine product innovation, according to leading consumer goods multinational **Procter & Gamble (P&G)**, North American consumers have a lot of *eureka* moments and experiences to look forward to in coming months and years.

Although the venerable Cincinnati, Ohio-headquartered consumer packaged goods (CPG) powerhouse has long been revered for cutting-edge product development and general packaging excellence, the unfolding global boom in e-commerce and on-line shopping seems to have P&G reaching for the stars with game-changing package design strategies breathing new vitality and vigour into iconic stalwart brands such as *Tide*, *Dawn* and *Old Spice*, with many more slated to follow suit.

"P&G is designing with what the e-commerce channel is bringing to the table for all of us," say Ken McGuire, a research fellow at P&G with 53 issued

U.S. patents to his name, including the new award-winning *AeroFlexx* liquid filling technology that could completely revolutionize the way that liquid products of all types are packaged and shipped across global markets.

"It (e-commerce) brings tremendous growth opportunities," McGuire says, "but it also brings challenges that maybe were not being addressed as effectively before, but rather remedied with 'Band-Aid' solutions.

"As the channel becomes more important to our consumers, our growth and our bottom line, we have instituted a number of programs that are e-commerce directed to improve our consumer experience and our ability to profitably withstand the new distribution channel challenges."

With online sales of consumer product in North America widely projected to grow by up to 30 per cent annually over the next few years, P&G has already established itself as an early major CPG pacesetter in the burgeoning new distribution channel driven by soaring demand for greater consumer con-



Procter and Gamble's research fellow Ken McGuire, who holds 53 U.S.-issued patents, played an instrumental role in the development of AeroFlexx liquid filling technology.



venience and product accessibility.

Recording net sales of US\$66.8 billion for fiscal 2018, P&G saw its online revenues soar by 30 percent to nearly US\$4.5 billion during the year—approaching seven percent of total sales—prompting the company to accelerate the development of more e-commerce-friendly packaging formats and structures.

Late last year, P&G launched a new ultra-concentrated **Tide** liquid detergent in an all-new **Eco-Box** container—measuring roughly the size of a standard shoebox—designed exclusively for e-commerce distribution.

Weighing less than eight pounds, the compact size of the patented *Eco-Box* bag-in-box package was designed to provide an attractive space-saving option for urban consumers with tight living quarters, with the added bonus of vastly improved packaging sustainability.

Containing enough liquid detergent for 96 loads of laundry, the *Eco-Box* package contains 30 percent less water than the 96-load jugs retailed at traditional brick-and-mortar outlets, while weighing four pounds less and using 60 percent less plastic.

According to P&G's brand manager for e-commerce Isaac Hellemn, "If everyone who buys the 96-load plastic bottle of Tide switched to the Tide Eco-Box, we could save enough plastic to cover 5,000 football fields each year."

Designed specifically to facilitate efficient shipping and stacking, the new package largely eliminates the need for extra wrapping and padding material like bubble wrap, according to P&G, resulting in far less packaging waste that ultimately ends up in landfills.

And because the package weighs a third less than the comparable traditional plastic jugs, the savings achieved in lower shipping costs allow for the Tide *Eco-Box* package to be listed at the same suggested retail price of US\$19.99 as the traditional 96-load plastic jugs—providing a win-win proposition for the target

consumer audience.

"The Tide Eco-Box is a combination of product and packaging innovation," states Brent Heist, head of P&G's Global Packaging Sustainability team in Cincinnati.

"Being a more concentrated product plays exceptionally well for e-commerce insofar as carrying less of a packaging footprint per use, without sacrificing quality of Tide performance benefits for the consumers," Heist points out.

RISING TIDE

"We were also able to incorporate a lot of consumer convenience features, like a no-drip twist-tap that provides carefully controlled dosing for the consumers," Heist explains, "while the built-in feet at the bottom of the box enables you the to raise the box just right to get the dosing cup underneath the dispensing tap if you're dosing on a flat surface."

"All of these things may seem small separately," Heist says, "but putting them together allowed us to give consumers a real 'delight of use' experience."

"All in all, we think it's a more user-friendly packaging alternative to simply shipping a standard lidded bottle surrounded by protective packaging that most consumers often perceive as waste."

While the *Tide Eco-Box* packaging was designed specifically for e-commerce retailing, McGuire points out that addressing the new distribution and other challenges unveiled by the e-commerce boom is now an integral part of the thought process guiding all new packaging development at P&G.

"The packages we have designed in the past to look wonderful and perform well in the brick-and-mortar environment may not require the same characteristics for traveling through the e-commerce supply chain," McGuire explains.

One of the more notable recent packaging successes unveiled at P&G has been

“We can’t sell a new technology to consumers unless it’s meaningful to them, and sustainability is a massive part of that connection.” - Brent Heist

the swift commercialization of the aforementioned *AeroFlexx* liquid filling technology, in which McGuire played a central role.

Already adopted for the company’s bestselling *Dawn* brand of dishwashing detergent and the *Old Spice* body wash line, the breakthrough technology uses compressed gas to achieve sufficient tailored rigidity to create firm structure in flexible films—eliminating the need for a traditional plastic bottle altogether.

By utilizing a proprietary one-way valve, the new flexible packaging format also facilitates cleaner dispensing, more controlled dosing and more convenient one-handed use, according to P&G, while still remaining tough enough for e-commerce shipping without extra protection.

Moreover, the *AeroFlexx* packaging uses 50 per cent less plastic than a traditional rigid plastic bottle and offers a 360-palette for branding and other for design graphics—making it a more resource-efficient solution.

TOTAL WIN-WIN

As a genuinely disruptive packaging innovation that earned the coveted *Diamond Award* at last year’s 30th annual *Awards for Packaging Innovation* competition of **The Dow Chemical Company**.

More recently, the *AeroFlexx Dawn* brand pack was picked as a finalist in two categories—including Best of Show—in the **2019 PAC Global Leadership Awards** competition of **PAC Packaging Consortium**, with winners to be announced at a special gala ceremony following PAC’s upcoming **ONEof100 Summit** packaging innovation forum in New York City on Feb. 26, 2019.

Says PAC president and chief executive officer James Downham: “Not only is *AeroFlexx* an exceptionally clever technology, it facilitates for creation of an incredibly sustainable package that also effectively addresses the e-commerce distribution channel requirements.

“It literally checks off every box on the good packaging idea checklist,” Downham extols, “making it a very special entry in our Global Leadership Awards competition.”

Acknowledging the disruptive nature of the *AeroFlexx* omnichannel flexible packaging solution, “It is actually intended to be an e-commerce option for all the bottles we sell one day,” McGuire proclaims.

“I can’t say for sure if we’ll get there eventually,” he allows, “but if it’s a better solution, why not give it a try?”

For his part, Heist says he has been very encouraged by the feedback to *AeroFlexx* packaging gathered through extensive market research conducted by

P&G prior to the launch.

“As with all new disruptive technologies, it can be polarizing,” Heist relates.

“Many people loved it, some people didn’t, but in the end it really comes down to the quality of brand execution, which I think we have done pretty well based on online reviews and other social media feedback,” he says.

“The people who tend to love this type of package are typically the younger, more experiential consumers more willing to try new things,” Heist expands.

“The Old Spice brand has been extremely well-received in the new packaging format,” Heist confides, “and even for the Dawn brand, our average online star rating is about 4.2 out of five,” Heist confides.

Both Heist and McGuire point out that as younger consumers continue to become better educated on sustainability issues, they are starting to appreciate the fact that flexible packaging is not the environmental villain that it is often portrayed to be in mainstream media.

“A proper Life-Cycle Analysis (LCA) will show that that this new package blows the bottle away just on the material usage alone, which is the most critical part of the LCA,” McGuire asserts.

“It’s a classic case of perception versus reality.”

Says McGuire: “The popular consumer perception is that because these flexible packages do not always have recycling streams, like curbside pick-ups, they are not as environmentally-friendly as the plastic bottles.

“But that’s just not the reality,” he sates.

“One of the things you will see in coming years is that these [flexible] materials will actually find their way into recycling streams because the demand is getting bigger and better,” McGuire argues.

“We are testing pilot programs and working on technologies that address all of the things that are claimed to be environmental shortcomings of flexible packaging.”

Adds Heist: “The *AeroFlexx* flexible packaging works well with younger consumers due to the intersection of technology development and fuller consumer understanding of the issue at hand.

“We can’t sell a new technology to consumers unless it’s meaningful to them, and sustainability is a massive part of that connection.

“That’s why our technology development is so closely tied to understanding what delights consumers and deliver on that demand—starting with the brands that we believe you think will deliver the greatest payoff.”

For McGuire, the ongoing efforts by P&G to lightweight its products for e-commerce applications to reduce shipping costs is perfectly synched with the



Brent Heist, the head of P&G’s Global Packaging Sustainability team, was one of featured speakers at PAC’s well-attended PAC to the Future II conference in Montreal last fall.

company’s large sustainability efforts in packaging and other key links in the supply chain.

“One of the things that P&G and other companies will continue to address is shipping costs,” McGuire states.

COST CONTROL

“We are used to designing wonderful looking packages that draw people’s attention when they are walking down the store aisle and when they take it home, but if you are paying to have those same items shipped through online retailing you may not necessarily make the best use of the space available to you,” he says.

“It is a challenge that many CPGs, P&G included, will continue to grapple with to address the different demands of e-commerce distribution for some time yet,” McGuire predicts.

“So while I like to think that our e-commerce-directed innovation program is ahead of the curve, it’s certainly not complete, but we are heading down the right path,” he says.

McGuire also notes that this disruptive game-changing *AeroFlexx* technology will be rapidly commercialized by Chicago-based **Innventure**, a team of experienced professionals with a history of entrepreneurship that partners with Fortune 100 firms.

“Innventure will scale this technology under a global licensing arrangement to make this an industry play that is not limited to P&G,” says McGuire.

“*AeroFlexx* is quickly gaining traction across a broad range of customers, brands and categories,” says Cedric Dsouza, chief technology officer for Innventure *AeroFlexx*.

“Based on the needs of our customers and their supply chains, our planning stance is to design and offer commercial executions of this technology to the industry via a menu of three options,” he explains.

“We will start by filling pouches for customers on a contract manufacturing basis,” he relates, “and we will then evolve to selling pre-made pouches that a firm can fill at their site on *AeroFlexx* fill/seal equipment.

“We will then advance to selling roll stock that a firm can put through *AeroFlexx* form/fill/seal equipment that it installs.”



“A fine beer may be judged with one sip, but it’s better to be thoroughly sure.”

- Czech Proverb

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SEIZING THE MOMENT

Digital disruption driving brand-owners to reassess branding and package design strategies to own the coveted Moment of Sale

Aidan Tracey, chief executive officer of sgsc, delivering a presentation on the Moment of Sale at a recent L2 Omnichannel event.



BY MICHAEL GRADY

How do you define a package? The package is now more than a carton, flexible pouch, bottle, can or other product container with a printed label found on a shelf in a retail store.

Think about it again in the context of an omnichannel shopper.

What is a package? The package is media. It is working hard to communicate your brand's value and promise to shoppers.

In many ways, the package sits at the center of the evolving marketing mix.

It's working around the clock to tell your brand story and convert sales whether on shelf in a store, featured on a billboard, in a product listing on a dotcom, in an *Instagram* post viewed on your phone, in the spotlight for three seconds at the end of an ad that interrupts a *Hulu* or *Netflix* binge, or available by food delivery app—just before the end of the big game being broadcasted live on *YouTube TV*.

It's clear that our world is becoming increasingly digital.

The path to purchase has changed and many prominent brands are finding out the hard way that continuing to produce state-of-the-art packaging to help their flagship products fly off store shelves is no longer enough.

Brands must now also devote resources for the digital world, where in the context of online shopping, physical store shelves are no longer the point of sale.

Digital disruption is rapidly shifting the narrative from brands winning 'Where?' the consumer makes their purchase decisions (Point of Sale), to 'How?' consumers are making their purchase decisions (Moment of Sale).

In this new world, the 'package' and its associated digital art files take on an

even greater level of importance to help companies deliver better, faster and leaner omnichannel solutions into the marketplace.

According to **sgsc** chief executive officer Aidan Tracey, "This shift from the point of sale to the Moment of Sale is all about addressing today's reality of where people are making their purchase, which is with smart phones, anytime, anywhere, with 24/7 availability.

"How consumers are shopping for their goods, researching, procuring and receiving their goods has undergone a dramatic shift which will rapidly continue in the future."

Today's omnichannel consumer expects that their needs will be put first. If a product is purchased, it is by the terms of the individual consumer rather than those of the retailer.

Accordingly, brands and retailers are changing to account for consumer expectations.

Putting the consumer first is key to winning in the omnichannel world. Successfully navigating retailer and e-commerce platforms is another important achievement. Consider the following omnichannel challenges:

- **Differentiated E-commerce Experiences.** Retailers are creating differentiated experiences on their proprietary platforms. Brands must not only know the nuances of each, but they must efficiently create, manage and distribute the right content to each.
- **Listing vs Selling.** Online sales are increasing in nearly every category. It used to be a good start to create a product listing. Brands need to be keenly aware of whether they are actually driving sales for their product or merely

Consumer Expectations & Omnichannel Best Practices



Anytime, Anywhere Shopping

Smart phones and devices.
Easy, seamless, convenient shopping.

Best practice:
Optimize for mobile

Young adults 18-34 spend 43% of their time consuming media on digital platforms. Almost a third of their time spent with media (29%) comes from apps/web on a smart phone which is the most of any measured generation.

Nielsen Report



Visual Engagement

Interactive, visual experiences.
From social media to eCommerce.

Best practice:
Scalable production of high quality branded content

Adding more images to Amazon product pages lifted sales by an average of +23%.
Adding video increased sales by an average of +55%.

Profiters Amazon Study



Product Transparency

Details on ingredients (BE / "GMO"),
allergens, chemicals, origin, etc.

Best practice:
Provide access to product data

Nearly 4 in 10 consumers say they would switch to a new brand from a current preferred brand in favor of increased product transparency.
73% of consumers would be willing to pay more for a product that offers complete transparency.

Label Insight Report



Product Personalization

Better, enjoyable,
relevant experiences.

Best practice:
Utilize data to build experiences

25% of consumers are open to sharing their data in return for a personalized experience.
70% of shoppers are willing to pay at least 10%+ more for personalized products.

Deloitte Report

creating a listing. If you're not selling, your brand may fall victim to algorithms that give your competition advantages during search.

- **Advertising.** Retail dotcoms are now advertising platforms. Not only must brands list and sell their product, but they must also create online billboards that build brand awareness, convert sales and fend off competition.
- **Efficiency Incentives.** Retailers are rolling out incentives for brands to conform to best practices that reduce packaging waste and improve efficiency. The penalty for non-compliance will cost brands in the short term, despite long-term benefits for stakeholders. The greatest opportunity for brands is to use the packaging as a communication tool and brand building platform.
- **Social Commerce.** The largest social platforms have begun incorporating options for brands to sell products directly from social posts. This keeps purchasing simple for the consumer and bypasses retailers altogether.

Disruptive brands have proven to be fierce competitors developing and executing winning sales strategies that are built for today's consumer preferences and digital and social platforms.

Some brands, existing only online, are bestsellers that have toppled long-standing traditional retail category leaders. With hundreds of thousands of followers, these brands are positioned to continue to win as more sales move to digital.

Successful online brands are even making their way into stores and capturing more market share. Brands must take action to protect market share and more importantly to drive sales growth.

To address the big shift from Point of Sale to the Moment of Sale, focus on improving your integrated solution by optimizing for omnichannel package design and digital graphics.

By leveraging the power of the Digital Art File created within a design-to-print workflow, brands can amplify production to efficiently produce physical packaging, print and digital POS/media, as well as branded digital content that is optimized for e-commerce and social media.

Evolving from a design-to-print workflow to a design-to-consumer workflow unlocks the power of the package to drive a synchronized experience across all touchpoints with significant efficiencies necessary to keep pace with the new, ever-faster digital economy.

By expanding an integrated solution to include more than print, brands are able to become better, faster and leaner.

Consider the following:

- **CGI (Computer Generated Imagery).** The Digital Art File is used to create foundational CGI assets. These assets are created as part of the packaging pipeline and are key to consistently producing high-quality, photo-realistic pack shots. A standard product view bundle meets the needs of all partners for e-commerce, retailer marketing and shelf set planograms.
- **Optimized Content.** Optimized content addresses how people are shopping on mobile phones. Both the Digital Art File and CGI are keys to optimized content. Imagery that is created with a screen in mind helps consumers easily understand a product's unique selling proposition.
- **Agile Content.** With the core CGI asset as the foundation for content creation, fuel social engagement by delivering an array of lifestyle and in-situation visuals.
- **Synchronized Data.** Deliver brand visuals and product data to all appropriate retailers. Make sure your data is accessible for retailers, retail service providers, e-commerce, internal use, application developers and others within an increasingly complex digital ecosystem.

As **sgsco's** chief marketing officer and president of digital Rob McCarthy explains, "Consumers expect easy access to detailed product information, such as pack images, infographics, image tiles, mobile images, relative-size imagery and video, to make informed buying decisions."

"We are now starting to see tangible and quantifiable evidence of the impact that optimizing product content and engaging e-commerce experiences have had on brand sales."

Just as consumers today are looking at packaging differently, brands must also look at packaging in a new way.

The package is at the center of the marketing mix and it's important to ensure it is properly leveraged to produce content for an omnichannel world.

Leading brands are evaluating branding and package design strategies and aggressively implementing workflow improvements to synchronize branding and packaging across the physical and digital shelves.

As brands become better, faster and leaner, they are in a position to meet consumer expectations at the Moment of Sale.

Brands are also able to rapidly implement ideas that drive growth and, rather than fending off startups, they are the brands to watch—agile, winning everywhere a purchase can be made; and innovative, capable of marketplace disruption.



CONFIDENT TO > Grow INSPIRED TO > Innovate

TC Transcontinental Packaging has grown to become a leader in flexible packaging in North America. With over 4,000 employees and 25 production facilities worldwide, we specialize in extrusion, lamination, flexographic printing and converting of plastic and paper products. Serving a variety of markets, TC Transcontinental Packaging understands that the packaging experience can transform the way consumers engage, shop, and buy.

The team at TC Transcontinental Packaging works together to deliver inspiration. Inspiration we gain from blending Art, Science, and Technology to create the perfect Flexible Packaging. Packaging that accentuates your brand, protects your product, and inspires consumers.

Our mission to deliver innovative packaging solutions has been the driving force behind our growth. **As we continue to evolve, so will your packaging.**

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- Industry leading quick-turn lead times
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- Coffee
- Meat and Poultry
- Confectionery
- Supermarket Fresh Perimeter
- Agricultural
- Industrial
- Consumer Household and Personal Care
- Beverage
- Bakery
- [and more...](#)



Nespresso Canada president Jean-Luc Valleix addresses attendees of PAC's recent PAC to the Future conference in Montreal last fall, holding up samples of the two different collection bags distributed by Nespresso at no charge to its Club Member customers for the collection and free shipment of used aluminum coffee capsules back to the company.



THE PERKS OF LEADERSHIP

Leading coffee producer spares no effort to lessen the carbon footprint and negative perception of single-serve coffee capsules

BY GEORGE GUIDONI, EDITOR

If the much-lauded Circular Economy model of waste-free packaging design and reuse ever needed a corporate poster child to inspire consumer product companies to step up their sustainability efforts, then the multinational coffee giant **Nespresso** would be a fitting choice by any objective measure.

As a company that introduced the world's first single-serve coffee machine back in 1986, the Swiss-headquartered coffee producer has naturally endured plenty of environmentalist backlash in the last decade over the alleged ecological crises caused by surging worldwide production of single-serve coffee capsules.

But despite widespread vilification of single-serve coffee pods as one of the worst excesses of unnecessary packaging waste messing up recycling streams and overwhelming landfills, the growing popularity and sales of this consumer-friendly packaging format has left leading coffee producers with a heavy burden



Having invented the world's first single-serve coffee pods and machines back in 1986, Nespresso has been at the forefront of the industry's recycling efforts since 1991.

of lessening the carbon footprint of their capsules in dramatic leaps and bounds, at the risk of facing outright legislative bans and consumer boycotts.

In many ways, Nespresso has had the luxury of being an early pacesetter in this race to coffee pod sustainability by virtue of making all its coffee pods, including the lidding, exclusively from aluminum, which is an infinitely recyclable material that can be reused again and again to make a highly diverse range of new products.

In fact, Nespresso launched its first capsule recycling program back in 1991—long before either single-serve coffee capsules or recycling, for that matter, became popular with the public at large.

According to Nespresso, the negative public image that single-serve capsules contend with today is largely the result of many of its competitors flooding the market with their own single-serve solutions that were not designed with recyclability in mind from the outset.

Late last year, Nespresso signed a Memorandum of

2019 PAC GLOBAL LEADERSHIP AWARDS FINALISTS

Winners to be announced at the **ONE OF 100** Summit in New York City on February 26, 2019.

BRAND MARKETING

NEW BRAND FOOD AND BEVERAGE



Brand Name: **Fort Hamilton**
Brand Owner: Alex Clark Spirits
Brand Agency/Graphic Designer: Bulletproof
Pre-press/Structural Designer: Bulletproof



Brand Name: **Revolution 81**
Brand Owner: Radical Road Brewing Co.
Brand/Graphic Designer: Bridgemark
Structural Designer: C.J. Graphics

NEW BRAND NON FOOD



Brand Name: **Orb Vitamins**
Brand Owner: Corr-Jensen Inc.
Brand Agency/Graphic Designer: forceMAJEURE Design

NEW BRAND LIMITED EDITION, PROMOTIONAL, SEASONAL

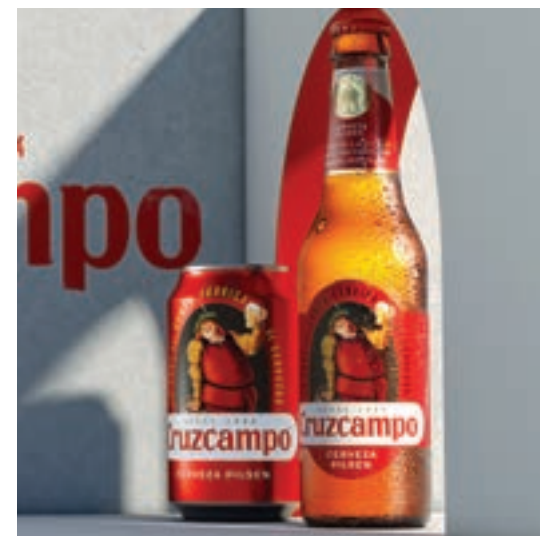


Brand Name: **Chandon**
Brand Owner: LVMH
Brand Agency/Graphic Designer: Interbrand
Packaging Converter/Printer/Raw Materials: Sleever International, Landmark Label



Brand Name: **Starbucks**
Brand Owner: Starbucks China
Brand Agency/Graphic Designer: Design Bridge
Pre-press/Structural Designer: Pre-Press = Design Bridge. Structure = Starbucks suppliers
Packaging Converter/Printer/Raw Materials: Starbucks suppliers

REBRAND, FOOD & BEVERAGE



Brand Name: **Cruzcampo**
Brand Owner: HEINEKEN
Brand Agency/Graphic Designer: Bulletproof
Pre-press/Structural Designer: Bulletproof

PACKAGE INNOVATION

SUSTAINABLE DESIGN



Brand Name: *Lush Fresh Handmade Cosmetics*
Brand Owner: Lush Fresh Handmade Cosmetics



Brand Name: *Love Beauty and Planet*
Brand Owner: Unilever
Brand Agency/Graphic Designer: Jones Knowles Ritchie
Pre-press/Structural Designer: Axiom
Packaging Converter/Printer/Raw Materials: Axiom, M&H, CCL container

TECHNICAL DESIGN



Brand Name: *Theory Wellness*
Brand Owner: Theory Wellness
Brand Agency/Graphic Designer: HIPPO Premium Packaging
Pre-press/Structural Designer: Duallok Ltd
Packaging Converter/Printer/Raw Materials: Duallok Ltd



Brand Name: *DAWN*
Brand Owner: Procter & Gamble Company

REBRAND NON FOOD



Brand Name: *La Parisienne*
Brand Owner: Lavo
Brand Agency/Graphic Designer: Pigeon Brands
Structural design bottle: Lavo Inc.
Packaging Converter/Printer/Raw Materials: Group 2 (printer label)

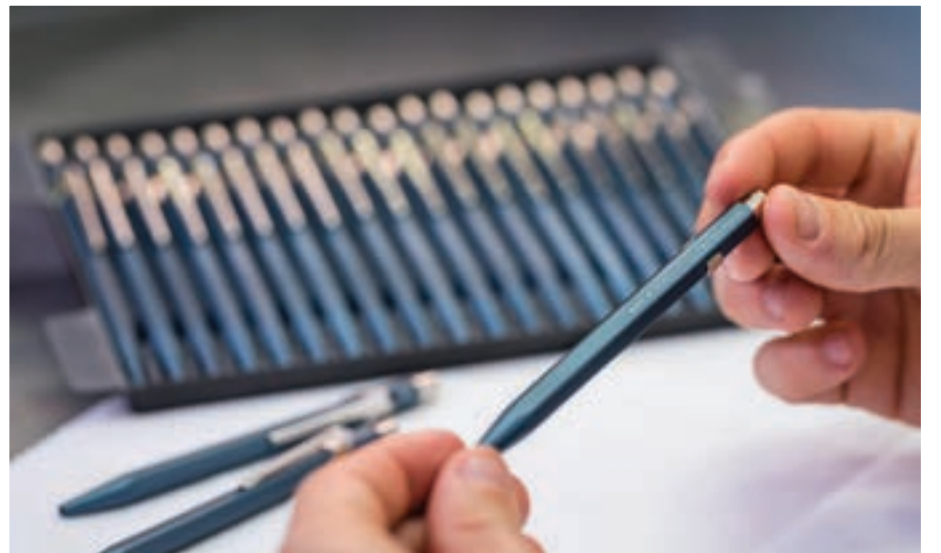
NEW BRAND LUXURY



Brand Name: *Olay (Golden Aura boutique)*
Brand Owner: The Procter & Gamble Company
Brand Agency/Graphic Designer: Nicosia Creative Expresso Ltd. (NiCE Ltd.)
Pre-press/Structural Designer: Nicosia Creative Expresso Ltd. (NiCE Ltd.)
Packaging Converter/Printer/Raw Materials: RPC - HVD Engine; Yonwoo - Preto Engine; Kurz - Sutom Foils; Red Spot - Custom Sprays.



The upscale Caran D'ache Nespresso Capsule Coffee 849 Darkhan Blue Edition ballpoint pens are made entirely from the recycled single-serve Nespresso brand aluminum capsules.



Understanding with leading global aluminum producer **Rio Tinto** to ensure that all the Nespresso capsules manufactured worldwide will be made from “responsibly-sourced” aluminum, as defined and certified by the international **Aluminum Stewardship Initiative (ASI)** group.

As one of ASI’s founding members, Nespresso’s close familiarity with the world’s second most-used metal makes the company an important link and stakeholder in creating and maintaining a sustainable aluminum value chain, according to Nespresso’s chief executive officer Jean-Marc Duvoisin.

“Nespresso is proud to have been a driving force in creating and implementing the ASI,” Duvoisin stat-

ed during the formal signing of the MOI with Rio Tinto in November of 2018.

“Together we have made responsibly-sourced aluminum a reality, and the ASI traceability mechanism will enable us to meet our commitment to customers to reduce the impact of their consumption,” Duvoisin stated.

“This is a positive step towards creating a more sustainable and environmentally-friendly future.”

The new sourcing initiative is a fitting follow-up to Nespresso’s *AAA Sustainable Quality Program*, rolled out in 2013 in partnership with **The Rainforest Alliance**, which pledges to secure the supply of highest-quality coffees, to protect the environment and

improve the livelihood of over 75,000 farmers in 12 countries where Nespresso sources its raw product.

As with the ASI initiative, Nespresso aims to source 100 per cent of its coffee from its *AAA Sustainable Quality Program* by 2020.

For all that, overcoming the negative publicity generated by widespread backlash over single-serve coffee capsules remains something of a work-in-progress for Nespresso globally and here in Canada, where the company’s **Nespresso Canada** business is making concerted far-reaching efforts to get Canadian consumers fully on-board its progressive capsule recycling initiatives.

“It is not enough for a package to be fully recyclable; it actually has to be recycled in order to be a fully sustainable package,” says Caroline Duguay, Nespresso Canada’s director of communications in Montreal.

To make this happen, Nespresso Canada is focusing on making it as effortless as possible for consumers to do their part by including special recyclable plastic bags with the purchased Nespresso brand packs to collect the used capsules at home—without any extra handling or cleaning of the used pods.

“Our unique aluminum capsules are the only ones that enable our Club Members [Nespresso coffee machine owners] to enjoy their coffee and recycle the package without having to touch or even look at the grounds inside,” Duguay points out.

“There is no separating the lids, scooping out the grounds or rinsing out the cap ... just bag it, seal it and drop it off at no charge.”

Depending on the region, Nespresso-supplied green-colored bags can be picked up through lo-



Produced by Swiss army knife manufacturer Victorinox, the limited-edition Pioneer Nespresso Shark knife is made entirely from the recycled Nespresso coffee capsules.



Being made of 100-percent aluminum provides Nespresso brand single-serve coffees pods with compelling recyclability advantages over many other brands.

cal waste diversion agencies, while the red-colored bags can be sent by mail at no charge via **Canada Post** directly back to Nespresso Canada, which works with various local recycling partners to separate the coffee grounds from the aluminum shell and lidding.

“The used coffee grounds are sent to local farmers for them to add in their compost solutions,” says Duguay, “so at the end of the day there is really no waste left behind whatsoever.

“Even the bag is being recycled.”

As of last spring, the red-bag program has been expanded to cover all Canadian provinces except for British Columbia and Quebec, where consumers use the green-bag option for pod recycling and collection.

“The red bag solution aims to increase the collection capacity of used aluminum Nespresso capsules by making it as easy as possible for our customers to participate,” says Nespresso Canada president Jean-Luc Valleix.

“We have always set ourselves apart, as evidenced by our decision to develop capsules with aluminum—a material that not only preserves the freshness of coffee grounds but is also infinitely recyclable.

Says Valleix: “Nespresso has been committed to ensuring sustainability for more than 25 years, taking an active stance in working with local partners and governments and investing in tailored recycling solutions across Canada and around the world.”

While Nespresso Canada has now reached an estimated 95-percent recycling capacity for all the single-serve capsules it sells in Canada, according to Duguay, the company is launching a new complementary incentive program designed to remind its Club Members to recycle all of their Nespresso pods properly—using advanced tracking technology to collect data and monitor how well individual Nespresso machine owners are playing their part.

Duguay says the Nespresso Canada team is now actively working on a launch of a unique pilot program—part of the company’s *Ethical Living Strategy*—in the GTA (Greater Toronto Area) region that will see Nespresso Canada introduce specially-coded individualized collection bags to thousands of local Club Members who have consented to be entered in a special database that will keep track of how many of the purchased Nespresso capsules they actually re-

turned back for recycling.

Embedded with personalized invisible but scannable product codes, the new high-tech bags will enable Nespresso to identify and reward its best-performing recyclers based on the data obtained from the returned bagged capsules, as well as to reach out to any underperformers to entice them to be more diligent in their capsule recycling.

As Duguay proudly points out, “This is a truly unique first-of-its-kind, only-in-Canada pilot program that will serve as a blueprint for Nespresso’s other global operations if it proves

to be a success.

“We see this as a real vote of confidence by our parent company in our approach to reducing the carbon footprint of coffee capsules in Canada,” says Duguay, “so there is a lot at stake for us in seeing this innovative program succeed.

“It definitely represents a big investment for the company,” she states, “but Nespresso Canada has always been serious about maintaining its market leadership position, and progressive environmental stewardship is a big part of our ongoing success.”



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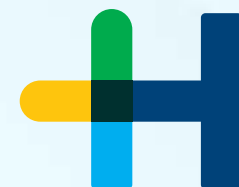
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Members of TC Transcontinental's Board of Directors and Senior Executive Committee pose for a group shot at the company's packaging facility in Brooklyn, N.Y., in an exuberant display of enthusiasm for the company's ongoing growth and transformation into one of the world's largest integrated producers and converters of flexible packaging products.

LEADING TO GROW

Sweeping corporate transformation serves up a lesson in the value of inspired senior management leadership and thoughtful strength of purpose

BY GEORGE GUIDONI, EDITOR

Like many buzzwords, the word “transformation” often lends itself to casual overuse—largely as a more emphatic euphemism for “change”—but as the late great business management guru Dr. Edwards Deming once deftly observed, “Transformation is not automatic. It must be learned; it must be led.”

In this light, the recent emergence of Montreal-headquartered **TC Transcontinental** as one of the world's largest converters of flexible packaging stands out as a textbook case of sweeping corporate transformation with a capital T.

Underpinned by a relentless quest for long-term profitable growth and inspired leadership skills of the company's winning duo, Isabelle Marcoux, TC Transcontinental's Chair of the Board and her husband François Olivier, Chief Executive Officer, the company's five-year journey from a packaging industry novice to one of its leading global lights may well be corporate Canada's biggest success story so far this century.

Founded back in 1976 by Isabelle's father Rémi Marcoux—one of revered early builders of the so-called *Québec Inc.* fraternity of ambitious new Quebec business enterprises eager to make their mark in corporate big leagues—the company's knack for reinventing itself to keep up with the times has fostered and nurtured a distinct family-like workplace culture and environment that played a key role in TC Transcontinental continuous growth and evolution.

As Isabelle Marcoux recalls, “Coming from a modest family of 11 children, my father thought it essential that Quebecers make their mark in the long term, which



TC Transcontinental's Chair of the Board Isabelle Marcoux (left) and her husband François Olivier, President and Chief Executive Officer, head the Montreal-headquartered company.



TC Transcontinental Packaging exhibiting the company's fast-growing range of flexible packaging innovations and sustainability solutions at last fall's PACK EXPO International 2018 packaging technologies exhibition in Chicago, generating a lot of positive feedback from the show's visitors and many other exhibitors.

is what he set out to do with TC Transcontinental.

"Intelligent, innovative and passionate, he took many risks," she says, "but only calculated ones."

"I toured a lot of factories with him and saw firsthand how close he is to the people, shaking hands, making them feel comfortable ... I learned a lot by seeing him interact with people."

While the idea of joining her father's business one day was always an option, neither Isabelle or her siblings were granted a free ride to senior management roles solely on the account of being part of the family.

"My father had outlined three conditions to the hiring of any of his children in the company," she relates.

"First, earn two university degrees; second, master three languages; third, work outside of TC Transcontinental for three years before joining."

After fulfilling these demanding requirements and joining TC Transcontinental's legal department in 1998 at the age of 29, Isabelle began her ascent up the corporate ladder—progressing from the position of director of mergers and acquisitions to vice-president

of corporate development, ultimately succeeding her father as Chair of the Board in 2012.

In 1991, Isabelle met her future husband and current TC Transcontinental President and CEO François Olivier, who joined the company in 1993 after serving as general manager at leading Montreal-area meat processor **Les Aliments Chatel's** and the former **Canada Packers** meat business of what is today widely known worldwide as **Maple Leaf Foods Inc.**

A Bachelor of Science graduate from Montreal's **McGill University**, Olivier's academic accomplishments went hand-in-hand with his natural athletic talents, with the famed Boston Bruins franchise of the **National Hockey League (NHL)** drafting him into their organization in his early twenties.

"Unfortunately, due to an injury, I had to switch gears," says Olivier, who took this change in stride to focus on furthering his academic pursuits—completing the graduate program for management development at the **Harvard Business School**—and entering the world of corporate management on a

full-time basis.

"I have always felt that it's important to have a positive outlook on life as much as possible," says Olivier, who immersed himself in learning as much as he could about the offset printing and publishing industries that at the time accounted for the lion's share of the company's revenues.

"A career, in whichever field we choose, will have some ups and downs, Olivier reflects.

"It is the same when managing a company; there will be good times and tougher moments.

"What drove me then and still drives me now in whatever I do, is making headway as a team and building something together," says Olivier, whose 2008 appointment as TC Transcontinental's President and CEO was preceded by progressive senior management roles at the company's printing plants and a posting as senior vice-president of the former Newspaper Printing Group, "where I managed a network of 17 facilities across the country."

According to his wife Isabelle, the couple's shared values, common interests and affable personalities

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have provided a solid platform for helping family patriarch Rémi Marcoux fulfill his vision of passing the reins of the highly successful business he created on to the second generation through orderly and well-executed succession planning.

“Our roles complement each other well,” Isabelle states. “As Chair of the Board, I oversee the strategic orientation and decisions that set the future trajectory of our corporation and determine how we would like to see it evolve over the long term.

“As President and CEO, François is responsible for developing and implementing our business strategy and managing our day-to-day operations to ensure the success of the corporation and create value for all our stakeholders.”

Says Isabelle: “Our strong entrepreneurial spirit, our ability to

A graphic snapshot of TC Transcontinental Packaging’s expansive global asset base following its high-profile acquisition of Coveris Americas last year.



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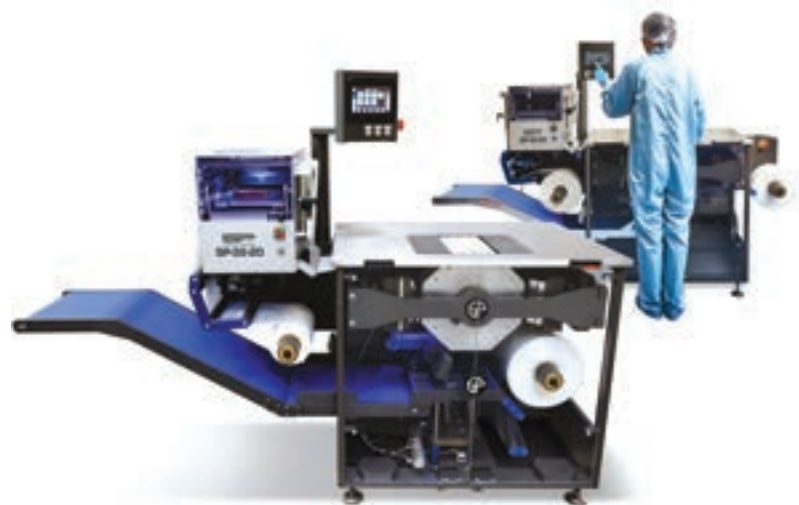
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TC Transcontinental founder Rémi Marcoux (left) steps down as Chair of the Board at the 2012 Annual General Meeting of Shareholders as Isabelle Marcoux, his daughter, is elected in this role.



Company founder Rémi Marcoux is sharing the stage with François Olivier when he becomes President and CEO of TC Transcontinental at the 2008 Annual General Meeting of Shareholders.

seize growth opportunities and convince the financial community of the merits of the strategy means we have a winning duo!"

Adds Olivier: "Playing sports at a high level certainly helped me be very efficient and dedicated towards any responsibilities I undertook, which translated into my work and ambition.

"Learning from others, listening, sharing knowledge, and gaining experience along the way have also definitely made a difference," he elaborates.

"I would also say that 'hearing' my board's advice and being a good listener is key, as well as having a long-term vision.

"I can honestly say that TC Transcontinental's values are the values that I believed in," Olivier states, "even before joining the company."

The need to maintain these values at the company's core became paramount when Isabelle became Chair of the Board in 2012, with TC Transcontinental initiating a comprehensive review of its operations to

diversify its current business and ensure long-term growth.

With the traditional offset print and media businesses both stagnating, the company's leaders knew they had to take action. First, having already invested a lot in their state-of-the-art offset printing platform, they continued to aggressively gain market share and innovate in this sector. Second, they undertook to divest most of their media assets. Thirdly, they decided to pursue a whole new growth strategy in the more promising packaging industry—specifically the flexible packaging business.

As Olivier recalls, "The flexible packaging industry was rapidly identified as a natural fit given our extensive manufacturing experience and the fact that the market offered, and still offers, many opportunities for growth."

Despite having had virtually no previous experience or exposure to the packaging business, the company's leadership team worked tirelessly to get the support of its board of directors, shareholders and employees to proceed with its new strategic plan of entering the North American flexible packaging market through a combination of strategic acquisitions and organic growth.

Says Olivier: "We analyzed different segments of the packaging industry—including metal, glass containers and folding cartons— but the flexible packaging industry quickly stood out as making the most sense for us, given the production process, consisting of pre-media, printing and finishing, was somewhat similar to offset printing."

Despite basic similarities and technology crossover, the TC Transcontinental team was under no illusions about the challenge of learning and gathering sufficient market intelligence about a vast new market in order to make a smooth entry and transition.

"At the time, we knew very little about packaging and so we set out to learn about it," Olivier relates. "We were also humble while going through our learning curve.

"We organized meetings with companies in the flexible industry packaging, we visited plants, attended trade shows, and soon realized that this new growth sector was promising for us because the market wasn't really consolidated."

As TC Transcontinental discovered, the North American flexible packaging sector was in fact highly fragmented industry with a couple of dominant players and a multitude of small and mid-sized operations without the necessary capital or technological resources to pursue further aggressive growth and expansion.

For a company built on a legacy of strong market leadership and technological innovation that made it into a \$3-billion-plus enterprise, the existing industry pecking order offered a unique opportunity for TC Transcontinental "to integrate acquired companies, realize anticipated synergies, generate sales growth, and identify complementary acquisition opportunities for our portfolio," according to Isabelle.

"We had the support of the Board of Directors and the family every step of the way, with the same goal in mind: long-term growth and continuity."

After making its first strategic acquisition in 2014 with the purchase of Clinton, Mo.-based dairy packaging group **Capri Packaging** in 2014, TC Transcontinental proceeded to execute five more strategic acquisitions over the next four years to strengthen

its product portfolio and geographic reach, which included two Canadian-based manufacturing operations in Vancouver and Montreal.

Although this four-year buying spree swiftly propelled TC Transcontinental to the upper tiers of North America's flexible packaging pecking order, its defining Bing Bang moment arrived just about a year ago in spring of 2018 in the form of a sensational C\$1.72-billion acquisition of the Chicago-headquartered industry powerhouse **Coveris Americas**.

With that acquisition, "We have crossed a historic threshold in our transformation and accelerated our growth in flexible packaging," Olivier asserts.

"It was a giant leap for us," he states, noting that as a result of the buyout, "the packaging sector currently generates more than half of our consolidated adjusted revenues of C\$3 billion on a pro forma basis."

Adds Isabelle: "The transaction marked a turning point in our 42-year history, crystallized our strategic shift toward flexible packaging, and solidified our commitment to profitable growth."

"When we first entered the flexible packaging market in 2014, it represented an important strategic move for the Corporation into a new promising

growth area," she remarks.

"It was part of our strategy, and still is today, to ensure our future growth path through diversification."

Despite having become a solid, vertically-integrated flexible packaging powerhouse with 28 production facilities, more than 4,000 employees, and leading or solid market shares in key vertical markets such as cheese and pet-food, among others, TC Transcontinental remains committed to maintaining the time-honored, family-rooted virtues and principles that have long made it one of Quebec's most respected major employers and model corporate citizens.

"As a family-controlled corporation, we have the desire to build a lasting company and to pass on the legacy of a solid, responsible corporate citizen," Isabelle explains. "We are committed to creating long-term value by investing in our employees' wellness and development, fostering growth in the communities in which we are present, ensuring our prosperity, and adopting good practices to limit the environmental impact of our activities."

For his part, Olivier is happy to extend much credit for the company's remarkable and well-executed transformation journey to its loyal, dedicated and

highly engaged workforce.

"Our talented employees are at the heart of our success," Olivier states. "Combined with the trust from our stakeholders, they really made a difference."

"We also had a clear strategy and executed our plan with diligence and determination, he adds, "and our solid financial position allowed us to make strategic acquisitions worth over C\$2 billion."

"We have completed an exhaustive due diligence process for each acquisition and once we closed the deal, we quickly moved into an efficient and structured integration process."

Adds Olivier: "We firmly believed that we could significantly leverage our manufacturing competencies in the flexible packaging industry that offered, and still offers, many opportunities for growth."

"The key is that we were willing to learn and to listen to the advice and knowledge that we were gaining along the way as we built momentum in the packaging industry," he concludes.

"In the end, that's what enabled us to execute our business plan diligently with agility and conviction, while being guided by TC Transcontinental's values of respect, teamwork, performance and innovation."



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A POSSIBLE WASTE-FREE FUTURE

TerraCycle partners with brands across the globe on waste-free packaging initiative

Sustainable options to promote a circular economy are relevant today more than ever before, and brands across the globe are recognizing the roles they must play in a waste-free world. A group of the largest consumer product brands have partnered with recycling leader TerraCycle in a first-of-its-kind waste-free initiative called Loop, announced at the World Economic Forum in Davos.

ONE OF 100

Tom Szaky, TerraCycle CEO and ONEof100 Storyteller said: "As a response to the global challenge in managing waste and the opportunity to improve consumers' experience, a group of committed global brands, retailers, infrastructure companies, along with the World Economic Forum have come together to create a new way to more responsibly consume products. Loop will not just eliminate the idea of packaging waste, but greatly improve the product experience and the convenience in how we shop."



The concept works by having consumers visit www.loopstore.com or Loop retail partner websites to shop for the specially and beautifully designed waste-free packaging from partner brands.

Consumers receive their products in Loop's exclusive shipping tote, eliminating the use of single-use shipping cardboard boxes. Loop collects the empty packaging placed inside the tote for pick-up at the consumers doorstep. The

packaging is cleaned with custom technologies developed by Loop scientists, replenished, and the products are returned to the consumer in the reusable Loop shipping tote.



The initiative stirs up nostalgic images of the milkman of the 1950s, who delivered reusable bottles at your doorstep and later picked them up to be refilled. Loop, as TerraCycle put it, is the milkman reimaged - honoring our past from a modern perspective.

P&G, another ONEof100 Storyteller brand and one of the major players in the coalition of Loop brands, used the World Economic Forum in Davos to announce the partnership, which helps further their own sustainability goals for 2030.

ONE OF 100

#ONEOF100 STORYTELLERS



Tom Szaky

Founder
TerraCycle



**Loop: A Revolutionary
Waste-Free Platform**



Caroline Le Roch

Regional Commercial Chief Officer
North America
L'Occitane en Provence



**Sustainable Business is
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Elizabeth Kinney

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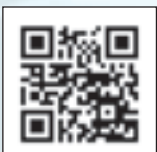
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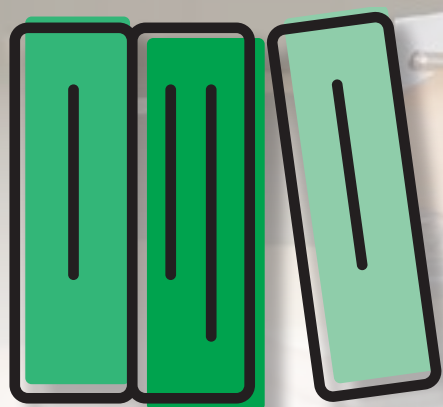




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Alan Blake, Director of PAC NEXT US and PAC FOOD

As the Director of PAC NEXT and FOOD from 2012 to 2016, Alan requires little introduction. He will lead PAC's webinar programs, food waste initiatives and liaise with important partners.

"I'm delighted to be able to support PAC again. I remain passionate about the important role that packaging plays in our society today. It's crucial to create a forum whereby collaborative supply chain solutions can be identified that deliver circular outcomes, to reduce and eliminate packaging and food waste."

Dan Lantz, Director of PAC NEXT

Dan Lantz joins the PAC team with over 30 years of experience in the waste management industry helping to improve efficiencies in material recovery facilities across North America.

"The organization does excellent work bringing together representation from across the packaging supply chain in a collaborative manner to reduce the impediments and improve opportunities to realize the goal of A World Without Packaging Waste.' I look forward to this opportunity with PAC as we take on new challenges and help the packaging industry move to a circular economy."



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