

A first-of-its-kind audit documenting the importance of packaging in and across retail channels.



Retail-Driven Packaging Decisions:

Packaging As A Profit Driver & Brand Enabler At Point of Sale

Relevant, quantifiable, and current data on changes already occurring among retail channels is a competitive intelligence resource sorely lacking – until now. This originally developed and executed audit and analysis is both an indispensable information resource and a visual reference that retailers, brand-owners, package converters, contract packagers, consultants, and those across the value chain can pore through time and again when faced with make-or-break decisions regarding packaging at retail point-of-purchase.

Highlights of this audit research include:

- 20 retailer strategy profiles
- 140 graphically illustrated exhibits – including more than 100 in full color!
- 40 easy-to-interpret Tables
- Key learning summaries for each of the audit's 9 sections
- Identified consumer insights and trends that support the relevance and importance of packaging as a key enabler
- . . .and Checklists that guide you through the 1st, 2nd, & 3rd Consumer Purchasing Moments of Truth

The report clearly presents and thoroughly addresses the relevance of packaging at retail, including:

- How packaging has been proven as the driver and enabler for retail channel success on a regional and global scale
- Consumer insight on packaging's specific value to retailers and brand-owners
- The importance of shelf-impact at the First Moment of Truth (FMOT)
- How channels are changing, blurring, and using packaging to create unique competitive advantages
- Verbatim comments and interpretation from 39 in-store retail audits
- Why packaging technologies have become the "enabler" at retail point of purchase
- The growth, impact, and importance to retailers of private label packaging
- Retail's leadership role in driving sustainable packaging
- The impact and growth of the top 5 retailers in China

PLUS: A first-hand account of packaging technologies being evaluated NOW at Metro's Future Store in Germany

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Traditional retail channels are shifting, crossing-over, and even totally disappearing. The pace at which it is happening makes it impossible for those who supply it to keep up with it.

In fact, the only constant among these dynamics is the importance packaging plays as the new driver and enabler of the modern retail environment.

This first-of-its-kind (and one-of-a-kind) research audit reveals the “sweet spot opportunities” for those looking to make a difference at retail through packaging.

Key Learnings This Report Provides:

- Face-to-face and on-site audits conducted by the authors exclusively for this report provide significant qualitative data and quantitative insight on the now-present role and the growing importance of packaging for retailers and across the packaging value chain.
- This original research describes, in detail, changing consumer attitudes and habits and how they translate to the changing retail landscape and packaging’s crucial role within it.
- The report offers dozens of specific examples pointing directly to how packaging has been proven as the driver and enabler for retail channel success on a regional and global scale.

Who Will Benefit From This Report

Retailers who are leading channel changes and who have both an immediate and on-going need for interpretive analysis of the advantages package innovation delivers at point of sale to their unique channel environments – including branded and private label products.

CPGs seeking to gain the upper hand on how to deliver new product and packaging that exceed FMOT requirements, and who are engaged in the battle for new product/package innovation supremacy.

Cross-functional teams with research, design, branding, purchasing, manufacturing, sales and marketing responsibility and who must understand and embrace dynamics of the changing retail environment.

Package suppliers, converters, and contract packagers and other 3PL providers willing to be vested in collaborative, package innovation development projects with CPG customers and retailers.

An Abbreviated Table of Contents*

EXECUTIVE SUMMARY

SECTION 1: THE PURCHASE DECISION AND RETAIL MEGATRENDS

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- Retail Drivers for Packaging
- Megatrend Drivers of Change for Retail Packaging
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- Store Manager Questions – Sample Responses

APPENDIX B

- FMI Resources for Supply Chain Management

APPENDIX C

- Top 25 United States Retailers

ADDITIONAL RESOURCES



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About the Authors

Primary author Anne Bieler, a Packaging & Technology Integrated Solutions (PTIS) Affiliate, has more than 30 years experience in food packaging, including 25 years with Cryovac.

She has provided marketing and technical expertise to major meat, poultry and cheese processors, food retailers, and foodservice companies in bringing new packaging concepts to retail success. In this report, Bieler provides insights into how and why packaging is driving the growth in new retail channels, category concepts, and private label. New consumer attitudes about convenience, quality of life, health, and wellness demand innovative packaging solutions that successful retailers understand.

PTIS is regarded as the packaging industry's premier tactical assessment and strategic problem solving organization. Its principles, Dr. Michael Richmond and Brian Wagner, bring a combined half-century of experience to bear in helping top-tier consumer packaged goods companies achieve their desired results through strategic organization, new growth, and productivity initiatives.

Mike Richmond has led packaging organizations at Kellogg's and Kraft, where he was responsible for developing and implementing technology discovery efforts and global packaging innovation. He is also a former assistant professor at Michigan State University's School of Packaging. Brian Wagner is the former manager of Global Cereal Packaging Innovation for Kellogg Co. He co-developed and instructs an on-line Master's course Value Relationships In Packaging at Michigan State University.

Richmond and Wagner are the co-authors of these other Packaging Strategies' reports:

- Sustainability & Sustainable Packaging
- Package Innovation
- Contract Packaging



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