Intelligent Packaging & Consumer Insights

Παρασκευή 15-04-22

End-to-end supplier
Complete system solutions for the food industry

Consultancy
Processing
Food Protection
Automation
Services
Packaging
Sustainability
Distribution
Marketing

The widest range in the industry

Our carton packaging portfolio
The widest range of shapes and volumes to choose from

Tetra Fino® Aseptic

Tetra Gemina® Aseptic

Tetra Prisma® Aseptic

Tetra Brik® Aseptic Slim Leaf

Tetra Wedge® Aseptic

Tetra Brik® Aseptic

Tetra Brik® Aseptic Edge

Tetra Top®

Tetra Fino® Aseptic Ultra

Tetra Top® MiniV

Tetra Rex®

Tetra Classic® Aseptic

Tetra Brik® Aseptic Base Crystal

Tetra Recart®

Tetra Stelo® Aseptic

Our Business 2021

70 years working alongside food producers

>25,147
Employees

>192 billion
Packages sold

>160
Countries

€11 billion
Net sales

	Packaging	Processing	Downstream
Units delivered	321	2 915	849
Units in operation	8 870	104 726	22 374

South Europe Market

Customers

106 Packaging and Integrated Customers

250 Processing Customers

419 Packaging lines

~2000 Processing equipment kits

People

3 Offices: Rubiera, Nova Milanese, Athens

1 Converting Factory: Rubiera

4 Legal Entities

Employees: 335 (+ 203 in Converting)

The era of insights-driven revolution

When traditional industries are transformed by digital technologies

- None of them have launched a new product, but they have re invented how to sell it
- Information and data are in the centre of their souls and business
- They took considerable scale before being profitable
- None of them had everything clear out in the first day, they have evolved over time

MEET

Consumer expectations are changing fast

2019

"This is the product I usually buy. I like the package design and I trust the brand"
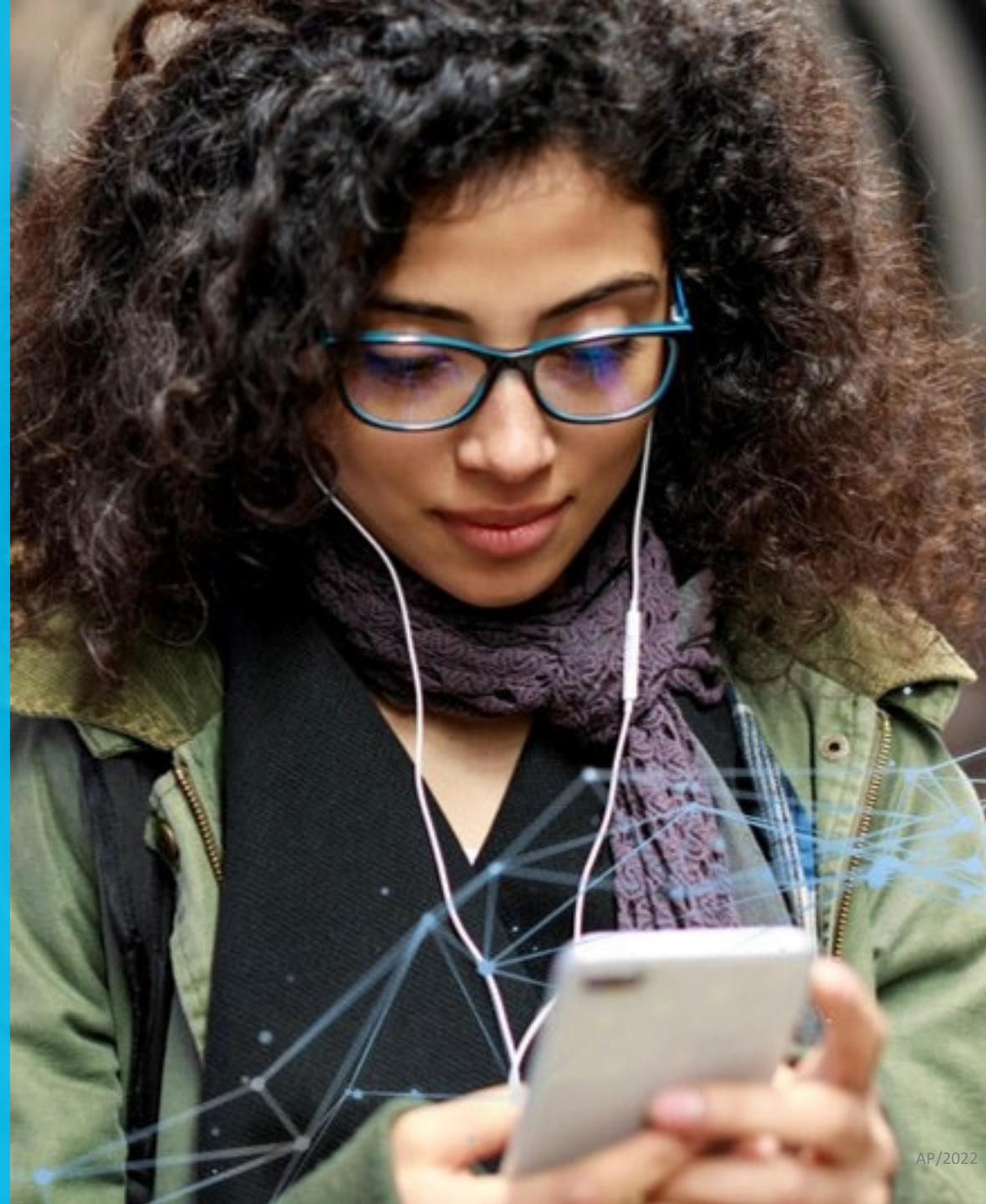
2022

"I want to compare the CO_2 footprint of my two favourite brands. Where's the code?"
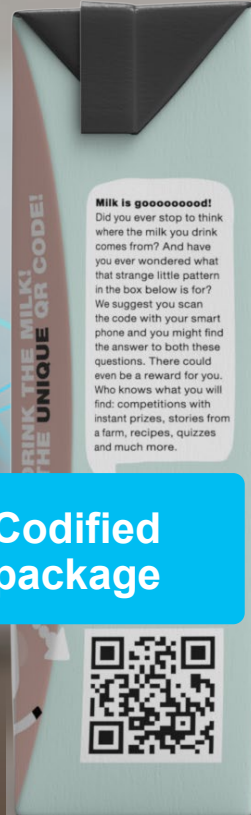
Consumers want relevant and cool experiences

Trends:

► Digital connectivity is accelerating change

► Target the right person at the right time

► Consumers don't know who/what to trust

► They value experiences over things

AP/2022

A connected object has two main functionalities

► **Help a user do something**

Ex: get additional info on the product before or after buying it (i.e. instructions, ingredients, origins…) and in general connect directly with the brand or with other users to improve the overall shopping/utilization experience with digital content, media etc

► **Help collect and analyze data to gain insights**

A connected object can generate and allows to retrieve, store and share digital information, like: where and when users 'interacted' with the object, user information (under GDPR regulations), polls, time spent on a branded experience etc

Possible enablers for Connected objects

Technology evolution supports different formats…

QR (Quick Response) codes

NFC (near field communication)

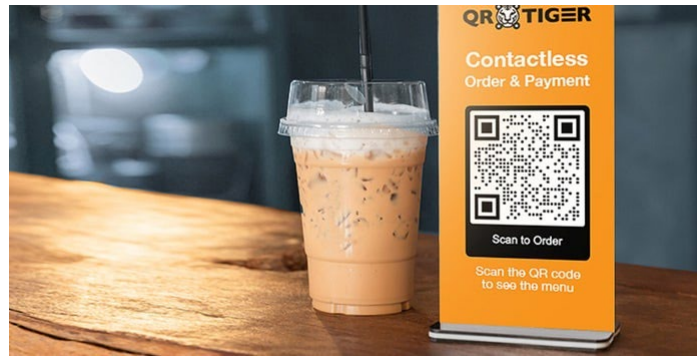RFID (Radio Frequency Identification)

Printed electronics

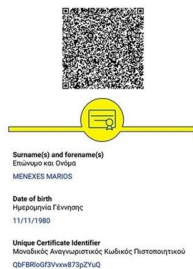# QR codes became part of our daily lives during the pandemic…and are here to stay!

COVID info

Touch-free menus

Augmented product info

In-store experiences

Connected package core value proposal
The future value relies on the information we help our customers integrate

Data stored on one pack during its lifecycle

New data to drive insight & decisions:
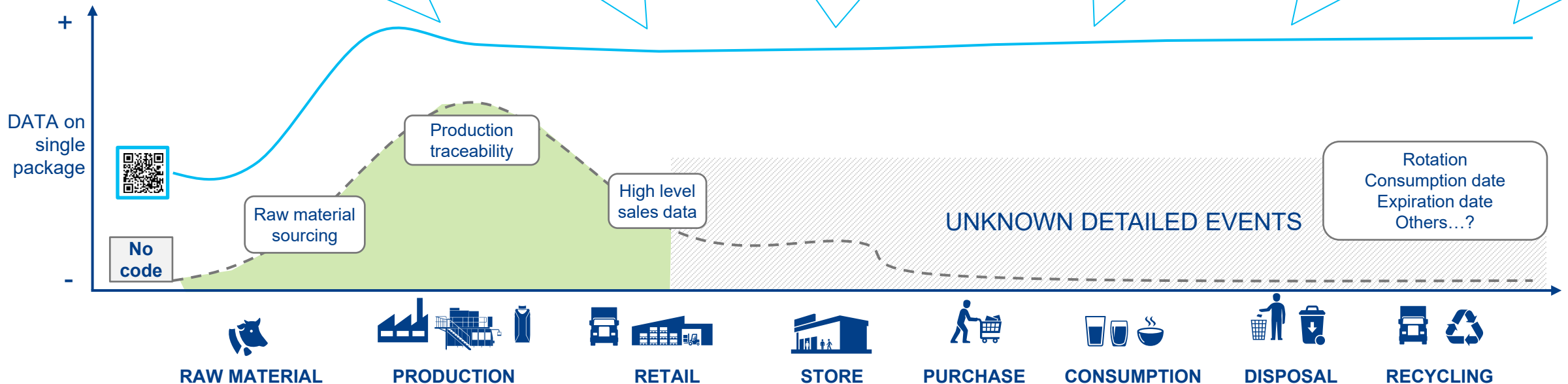
- Inventory SKU mapping
- shelf life control

- Geographical spread of distribution
- Quality control issue resolution

- Timing of store arrival
- in-store stock levels

- Consumer demographics
- Moment of consumption

- Consumer behaviour
- Recycling effectiveness
- Geographical spread

- Consumer behaviour
- Recycling effectiveness
- Geographical spread

DATA on single package

No code

Raw material sourcing

Production traceability

High level sales data

UNKNOWN DETAILED EVENTS

Rotation
Consumption date
Expiration date
Others…?

RAW MATERIAL **PRODUCTION** **RETAIL** **STORE** **PURCHASE** **CONSUMPTION** **DISPOSAL** **RECYCLING**

Turn every package into a "phygital" marketing asset

► Enriches the consumers' experience and lets people connect directly with your brand

► Drives sales and strengthens loyalty

► Enables data-driven, one-to-one marketing activities
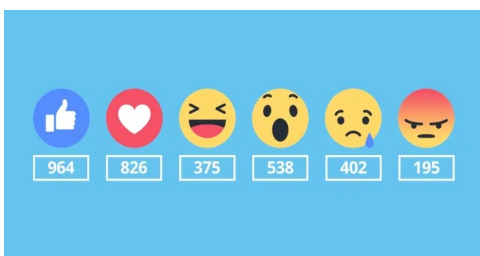
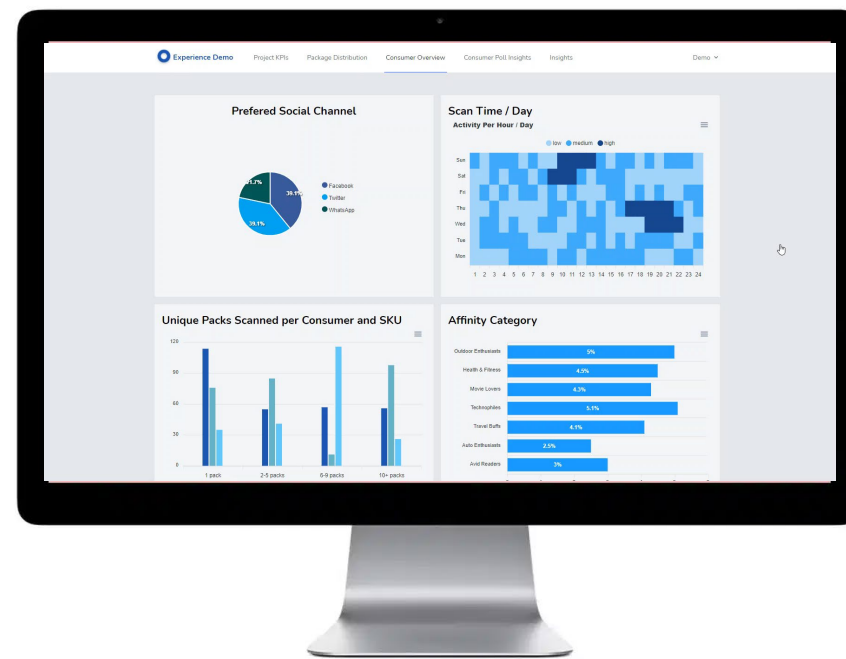► Engages consumers to provide insights

Examples of Connected Package possibilities

Engaging digital content for the consumers (games, digital coupons, polls and information)

Real-time insights to help you execute brand strategy with data-driven decisions

Typical Connected Package project outcomes

Sales growth

Average 20-80% sales growth

Digital channels

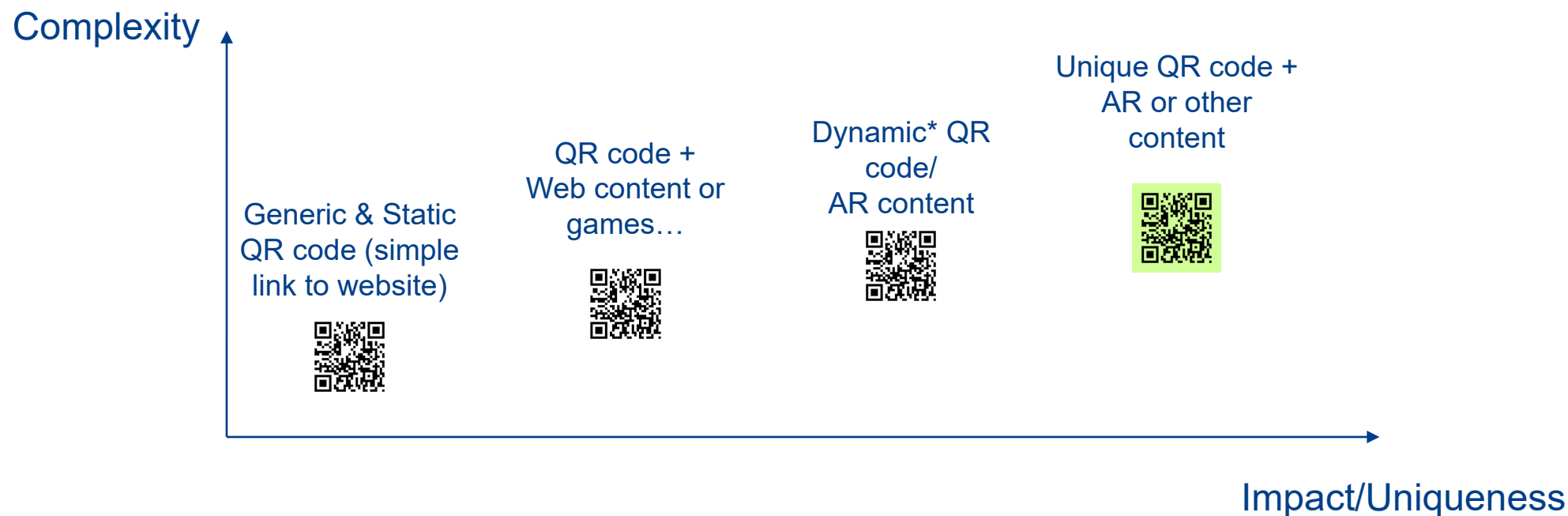Grow digital presence and increase followers with engaging content

Consumer insights

- Detailed personas for several SKUs
- Marketing budget optimization (impressions, prizes..)
- Real-time monitoring of regional distribution reach

Key questions to get started

► Who is the target user/s??

► Why should they come back on the experience?

► Is this securing additional sales of packs?

Complexity

Unique QR code +
AR or other
content

Dynamic* QR
code/
AR content

QR code +
Web content or
games…

Generic & Static
QR code (simple
link to website)

Impact/Uniqueness

*Static code: anyone, is ALWAYS taken to the same webpage (kellog.com) regardless of where, when, who scans
Dynamic code: the users is redirected to different pages/experiences according to a set of rules: location, time of the day, account profile
Unique: www.kellog.com/ashjash1267128 - non-unique is www.kellog.com/Greece. Unique is also extremely important for T&T purpose, as it is the only way to link a specific package to a production lot

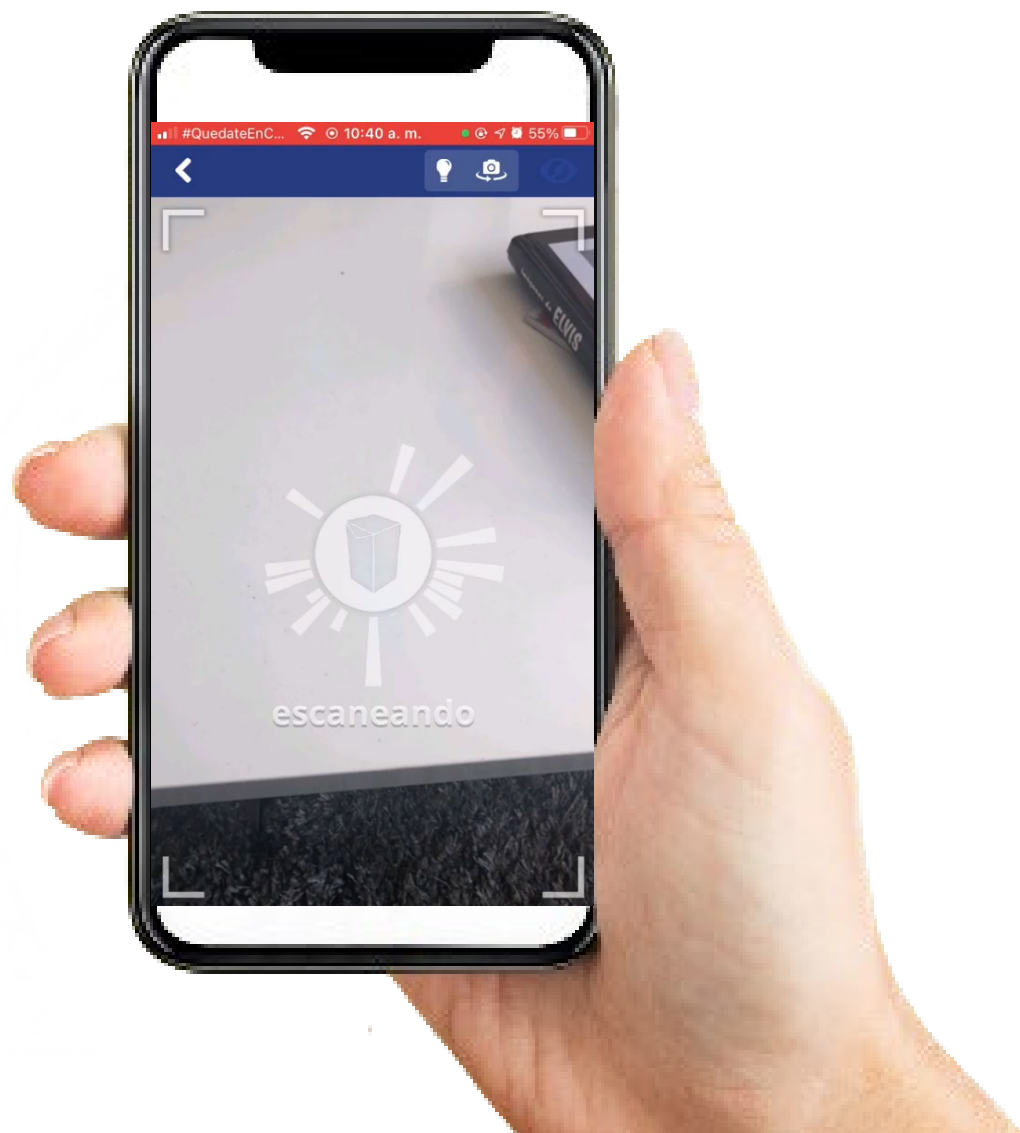# Web AR
Kellogg's Frosted Flakes

| Scan the QR code with your smartphone camera or QR code reader and aim at the pack.
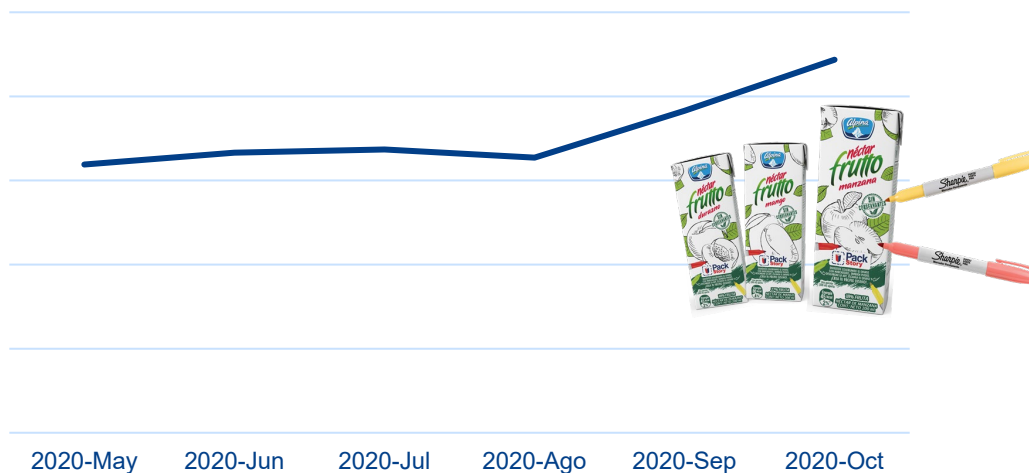
Integrate the pack to the content

Using the packs as a 3D animation player will have great impact

+33% brand vol vs last 6 months

Brand Sales

| 2020-May | 2020-Jun | 2020-Jul | 2020-Ago | 2020-Sep | 2020-Oct |

Product Transparency: the time is now

THE TIME IS NOW

'From safety concerns to ethical issues, food traceability is a growing priority up and down the supply chain. How can you ensure food safety if you have no visibility of where the ingredients originated? Or that they do not contain illegally or unethically sourced animal products? What assurances can you pass to the end consumer? Traceability also allows businesses to make better decisions that align with company goals that are tied to Environmental, Social and Corporate Governance (ESG)'

The ROI of Transparency: Food & Beverage Edition

Do you want to give your food & beverage competitors a 38% head start?

Because over one-third of U.S. consumers look for or make transparent food & beverage brands their first choice.

This begs the question:

Are you ready for a wave of new customers?

FDA U.S. FOOD & DRUG ADMINISTRATION

NEW ERA OF SMARTER FOOD SAFETY

FDA's Blueprint for the Future

PACKAGING EUROPE

CONNECTIONS   TECHNOLOGIES   SECTORS   COMMENT   E-COMMERCE

Why traceability in food production is also a profit opportunity

21 MAY 2019

EUROPEAN COMMISSION

Brussels, 20.5.2020
COM(2020) 381 final

EU 'Farm to Fork' strategy

COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS

A Farm to Fork Strategy
for a fair, healthy and environmentally-friendly food system

'**Under Horizon Europe, the Commission proposes to spend EUR 10 billion on Research & Innovation on** food, bioeconomy, natural resources, agriculture, fisheries, aquaculture and the environment as well as **the use of digital technologies for agri-food'**

Connected Package solutions create value throughout the digital journey

Unique code on each Package

| sourcing | manufacturing | distribution | retail | consumer | recycling | analysis |

At each stage, data is captured and processed.

CONSUMER ENGAGEMENT EXPERIENCES CAN DELIVER ON MULTIPLE BRAND OBJECTIVES

PROMOTION OF NEW PRODUCTS

LONG TERM LOYALTY

REAL-TIME, LOW COST CUSTOMER RESEARCH

'EDUTAINMENT'

TRANSPARENCY

YOUR CUSTOM OBJECTIVES!