



# Resealable food packaging:

How are consumer perceptions and expectations changing?





# Sneak a peek

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# Introduction

Globally, consumer attitudes towards the packaging around their food are shifting. There is now a far better understanding among brand-owners and retailers of just how heavily purchasing decisions are influenced by packaging. This influence is exerted by graphics and structure but also by the shopper's previous experience of the pack in use.

Marketing departments talk about the 'moment of truth', meaning the instant impact which determines whether a given product is selected in-store. But how important are these considerations to the majority of consumers? So long as a product is in stock, how much impulse buying and brand-switching really goes on?

Shoppers are keener than ever to pursue 'value for money' in their in-store and online purchases. But this apparent loss of loyalty - both to particular retailers and even to brands - is counterbalanced by a greater awareness of how certain products meet the specific needs of a family or household. Value-chain partners and consumers alike understand more clearly that packaging can make a real difference in terms of functionality, convenience and overall experience of the product in use through features such as resealability.

The growing role played by online sales (where the 'moment of truth' disappears completely) and the higher profile given to food waste, and ways of avoiding it, are both fuelling this shift in attitudes and expectations.





# Convenient Packaging

In the chilled food category, and particularly among sliced cheese and meats, 'convenience' means, above all, ease of opening and – increasingly – resealability.

We have all experienced packaging which seems to do its best to keep us out, rather than allowing us in. It is especially frustrating when a supposedly 'easy-open' tab or other device is not 'easy-open' at all, or a 'reclosable' pack does not reclose.

This negative experience of a product, which may persuade consumers not to make a repeat purchase, can be transformed into positive brand reinforcement when the pack is genuinely simple to access and easy to close again.

Do consumers really notice or care about these features? At the beginning of 2015, market research company Euromonitor emphasised the importance of functionality in packaging. For example, demand for microwaveable packs was on the rise, it said. Euromonitor also singled out resealability as something that consumers were increasingly looking for.

The theme is widespread. Last year, print and packaging industry specialist Smithers Pira issued a briefing on the top five packaging innovation trends. These included 'Pack differentiation' in the sense of immediate graphic or structural impact. But significantly, 'People-pleasing packaging' appeared higher up the market intelligence company's list.

[1] Euromonitor video blog, Functionality is Key to Ready Meals Packaging, Mylan Nguyen, March 2015.

[2] Smithers Pira briefing, The Latest Innovations in Packaging, March 2014.

Here, the touchstone was meeting consumers' unmet needs, with convenience identified (here as elsewhere) as a major factor in 'pleasing' the consumer.

Most primary packaging has evolved away from being a vehicle for brand identity pure and simple, and consumers are more aware of a range of possible responses to the pack and how they interact with it. This includes judgements on the clarity and legibility of on-pack instructions and information.

In the chilled food aisle as elsewhere, retailers have been busy segmenting their ranges with economy, standard and premium offerings. Shoppers are becoming accustomed to spotting – and appreciating – the differences.

In fact, despite the vogue in some areas for relatively costly (and not always effective) reclosure systems such as zippers, adding value for consumers in the form of convenience need not be an expensive undertaking. In Central Europe and the Nordic countries we have seen over 90% of the pre-sliced cheese market move to a combination of rigid tray and peelable film lidding<sup>[3]</sup>. Where this change has already happened, a switch from peelable-only to peel-and-reseal can be made without the need for any major capital expenditure.

From a consumer's point of view, resealability is the most tangible element in the bigger picture of 'keeping food fresher for longer'. Combinations of modified atmosphere and – increasingly – high-barrier complex structures including layers such as ethylene vinyl alcohol (EVOH) make the biggest contribution to shelf-life, of course. But for consumers, it is hands-on features such as resealability which form the visible tip of this largely invisible iceberg.



[3] Estimates from Bostik market data.



# Safe Packaging

If consumers increasingly value packaging which is convenient, they also expect it to be safe.

In Europe, the 2013 horsemeat scandal showed the impact that a consumer loss of faith in a particular category can have on food sales. Of course, reports of contamination from packaging or interactions between materials and the food they contain do flare up from time to time. Recent examples have included bisphenol A (BPA) and mineral oils from recycled paper and board.

As the British Plastics Federation commented recently, substances at minute levels which only a few years ago would barely have been detectable are now

readily identifiable<sup>[4]</sup>. This is great news for scientists, but not quite so good for the general public, given that test findings can easily be misrepresented or communicated in an irresponsible way.

As recently as last summer, a Mintel analyst drew attention to shoppers' lingering concerns about food-contact packaging<sup>[5]</sup>. She focused on cans and plastics in the US market, but these are concerns shared around the globe. According to Mintel, this represents an opportunity for brand-owners to take the initiative in reassuring consumers about the packaging materials used.

For most value-chain partners, however, consumer confidence in the safety of

[4] 'Contact Addressed?' Plastics in Packaging, September 2014.

[5] Mintel report, Food Packaging Trends, US, July 2014.



packaging is an unspoken assumption rather than something which needs to be spelt out in a positive marketing message. This is as true for the adhesives used to deliver resealability as it is for the polymers in the packaging.

Too often, tests on migration levels and other critical parameters, including the increasingly-scrutinised non-intentionally added substances (NIAS), are seen simply as being an additional cost. Rather, they should be thought of as an investment. The European Plastic Converters Association has commented that current EU regulation does not fully address the challenge of NIAS in particular. Other experts have said that the guidance is simply too vague<sup>[6]</sup>.

This represents an opportunity for supply-chain partners to stand out by going beyond the strict letter of the law in their testing regimes. In Europe, the REACH (Registration, Evaluation, Authorisation and Restriction of Chemicals) regulation has for several years reinforced standard practice in downstream communication and co-operation from supplier to customer. A proactive approach to analysis and an openness with collected data demonstrates that upstream partners are fully attuned to this prevailing global business culture.

Today, in any jurisdiction, if commercial partners ever raise questions about the safety of packaging, migration or interactions with packaged food, clear and speedy traceability is necessary to track components back through the supply chain.

Documented evidence of those components, of test results and potential interactions also constitutes an invaluable resource if questions arise in the media or among consumers. Careful accumulation of this data is an insurance policy which – in an ideal world – consumers will never need even to consider, and which will ideally never be invoked.

[6] 'Contact Addressed?' Plastics in Packaging, September 2014.



# Packaging, Food Waste and Sustainability

In 2011, the UN's Food and Agricultural Organisation (FAO) put total global food waste at 1.3 billion tons<sup>[7]</sup>.

FAO says it does not have more recent figures, but the European Commission estimates that annual food waste in the EU amounted to over 100 million (metric) tonnes in 2014<sup>[8]</sup>. It expects that total to rise to around 126 million tonnes by 2020, if nothing is done.

Of course, something is being done, thanks to the far higher profile that the issue now commands both among supply-chain partners and consumers. That awareness has been given an extra edge by the

financial and economic downturn across many markets since 2008, and by the widespread austerity measures which followed in its wake. Reduced household budgets have added the rationale of self-interest to the ethically-driven arguments for reducing consumer-side food waste.

Research shows that, around the world, consumer interest in environmental challenges has increased<sup>[9]</sup>.

At the same time, awareness campaigns in developed markets, particularly in Europe, have raised the profile of the food waste issue among consumers. One prime example is the Love Food, Hate Waste

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[7] FAO study, Global Food Losses and Food Waste, 2011.

[8] European Commission website.

[9] See for example 'Consumer Environmental Awareness and the Role of Green Entrepreneurship', Torben Klarl, University of Augsburg, 2013.



campaign co-ordinated by the UK's Waste & Recycling Action Programme (WRAP).

'Sustainability' remains a rather nebulous concept for many consumers (and indeed for many in business), but the dual link between waste reduction, household spending and environmental impact seems to gel as a readily-understood message.

In fact, research shows that the relationship between these issues and the role of packaging remains confused in the minds of many consumers. Despite a shifting media focus, attitudes to food packaging itself appear resistant to change.

Ipsos MORI research with just over 1,000 UK adults published by the Industry Council for Packaging and the Environment (Incpen) in 2008 found that 46% of those questioned believed that packaging 'uses too much material'<sup>[10]</sup>. In online research carried out four years later (and published by WRAP in 2013), this proportion had actually risen to 52%<sup>[11]</sup>.

At the same time, awareness of the benefits conferred by packaging is only slowly increasing. In 2008, 15% of respondents recognised that packaging 'extends the life of the product', compared with 22% in 2012. Resealability exemplifies the type of benefit that consumers notice.

As those behind the Love Food, Hate Waste campaign discovered, consumer education still has some way to go. While 42% of those polled in 2012 agreed that packaging kept products 'safe and hygienic' in general terms, with 36% underlining its protective role in the supply chain and on the journey home, only 13% thought it had a role in protecting food in the home. In fact, in some categories such as fresh produce, many consumers believe items will last longer when taken out of their packaging.

Even if these findings are true of attitudes

across developed global markets, they can – and should – be taken as an opportunity to counteract those negative (and many would say 'outdated') attitudes to 'overpackaging' outlined above. At the same time, building on the growing awareness of the pack's positive protective role in the home, specific formats can reinforce the link between this function and reductions in food waste.

A pack which combines resealability with easy-opening is a prime example of a product presentation which can successfully build bridges in this way, especially if the mechanism and its benefits are clearly highlighted on-pack.



[10] Ipsos MORI, 'Public Attitudes to Packaging', 2008.

[11] WRAP, 'Consumer Attitudes to Food Waste and Food Packaging', 2013.



# Consumer Loyalty and Brand Perception

With consumers' loyalty to specific retail and product brands being challenged by discounters and online alternatives on the one hand, and by increasing private-label offerings on the other, no opportunity for brand-building and positive reinforcement can be ignored.

With above-the-line marketing spend often constrained, and pulled in potentially more directions as the importance of online advertising grows, point-of-sale merchandising and packaging continue to play a critical role. Packaging, and in particular its user-friendly aspects, will often feature in integrated marketing campaigns.

Researchers at Cambridge University in the UK characterise the two traditional functions of retail packaging as the

'salesman' (catching the consumer's eye) and 'security guard' (reducing in-store theft)<sup>[12]</sup>. But they have speculated that, as internet shopping channels account for a rising proportion of sales, packaging will be increasingly called on to play a different part: being genuinely useful, convenient – and memorable – in use.

Of course, many will question any assumption about the future share that online sales will take of food and drink markets across the developed economies. But in any case, the importance given to packaging's functionality and convenience can only increase. Impulse buys are fine, but repeat purchase is what all brands aspire to.

In the US, regular consumer research by the MeadWestvaco (M WV) packaging business

[12] 'Access all Areas', Plastics in Packaging, June 2015.



continues to underscore the strength of the connection between ‘packaging satisfaction’ and purchasing patterns<sup>[13]</sup>. In many cases, that awareness stretches to a willingness to pay more for an item which combines what is perceived to be higher-quality product with increased functionality in the packaging. Consumers in developed markets are familiar with category segmentation and the differentiated price points which come with it.

A recent UK university study indicated that easy-open/reseal packs achieve twice the customer satisfaction levels of easy-open-only packs<sup>[14]</sup>. Depending on the value of the product, up to one fifth of consumers say they would be willing to pay slightly more for a reseal pack.

By incorporating what Smithers Pira calls ‘people-pleasing’ features into their packaging, brands are already going a long way towards winning over the consumer. But by developing packaging which prolongs the life of chilled foods and which – thanks to a reseal capability – counteracts any impulse to transfer product into an alternative bag or container in the fridge, the brand itself is reinforced by being in front of the consumer for longer.

Additionally, at a time when international recycled plastics markets are looking shaky in the face of lower virgin polymer prices, the link between resealable packaging, longer product life and reduced food waste offers brand-owners and retailers a stronger, alternative sustainability message.

These are not lessons for the chilled sliced cheese category alone. Smoked and other processed fish and sliced meats – such as bacon and salami – can benefit, too, as can sausages. The peel-and-reseal approach is also proving to be a strong support for brands in some ambient categories such as baked goods.

[13] MWV study, Packaging Matters, February 2014.

[14] Sheffield Hallam University, consumer satisfaction survey, 2015.



# Future Perspectives

Consumers are increasingly hungry for – and appreciative of – packaging which is at once convenient, easy to open and to reclose, which prolongs the useful life of food and so helps to prevent waste. All the signs indicate that this hunger will only increase over the coming years.

Even though many households have had to tighten their belts, the will to economise will still be balanced by the desire to indulge in premium ranges of chilled and other foods. These ranges will require premium packaging around them.

What does this mean for the value chain? Co-operation on technical projects delivering high-barrier, functional structures which please more than just the eye will grow in importance. Upstream suppliers of polymers, barrier materials and adhesives will increasingly work together

to maximise product functionality, including the reseal function. Given the visible contribution that well-engineered packs make to shelf-life, consumer perceptions of packaging will continue to shift in a positive direction.

Closer co-operation will also help to maximise product safety. Open and well-researched communication down the supply chain will ensure that any concerns are thoroughly addressed – proactively, among value-chain partners – so there is less likelihood they will ever need to be aired in public.

On-pack communication with the consumer will also be given greater prominence, helping to emphasise the benefits of packaging solutions such as resealability and so further reinforcing the brand's positive image.



# About Bostik, an Arkema company

Bostik is a leading global adhesive specialist in industrial manufacturing, construction and consumer markets. For more than a century, it has been developing innovative adhesive solutions that are smarter and more adaptive to the forces that shape daily lives. From cradle to grave, from home to office, Bostik's smart adhesives can be found everywhere. The company employs 4,900 people and has a presence in more than 50 countries.

Bostik's solutions for industrial manufacturing applications include adhesives for rigid and flexible packaging, including peel/ reseal lidding and the lamination of plastic film.

