A major statement was made at the 2013 Global Pouch Forum: It would be a mistake not to pay attention to the growth of the pouch in packaging.

The 16th annual Forum was also the largest pouch conference ever held by Packaging Strategies; more than 500 attendees and 75 exhibitors swarmed the halls at the Westin Beach Resort in Fort Lauderdale, FL. It featured a major keynote address from Michael Okoroafor, vp of global packaging innovation and execution at H.J. Heinz Co. It was one of the first times a standup pouch event featured a strong statement from a major brand owner on the need for the pouch as a replacement in the food and beverage market.

“Shelf presence plays a deep role in flexible packaging,” Okoroafor emphasized while commanding the stage. “We’ve gotten some results there to fuel innovation for every brand that meets consumer needs and accelerates that pace in the marketplace.”

Okoroafor discussed the need for a robust pipeline, of getting to market before others know to do so, of packaging as a delivery vehicle, and of Heinz’s passion for new innovation, with a bevy of pouch-based products launched. Other speakers, including Kenneth Wilkes, CEO of Smart Bottle Inc., talked of stepping up concepts and machinery to help with the launch of Kraft Foods’ new YES Pack, a foodservice innovation for bulk salad dressing pouch.

And both Neil Kozarsky, president/CEO of development firm T.H.E.M. and Jim Campbell, president/CEO of equipment maker Multivac, talked of a joint launch of a new snap-opening pouch that is being piloted by brand owners under the Snapsil name. “Fresh and sealed meet consumer needs,” Kozarsky said. “It is not just flexible packaging but what it must do.”

Packaging Strategies’ Perspective: As far as market disrupters go, the pouch is also making headway into areas outside of core food and beverage applications. For more coverage of the Global Pouch Forum, see the special section inside this issue. PS
Natural Polymers
U.S. Industry Study with Forecasts for 2016 & 2021

U.S. demand for natural polymers is forecast to expand at a strong 6.9 percent annual pace to $4.6 billion in 2016, reaching 1.7 billion pounds. Growth will stem from continued trends favoring natural ingredients in the large food and beverage industry. In particular, this will support demand for cellulose ethers, as well as natural gums. However, growth will continue to be impacted by the climatic and political uncertainties associated with natural products which are derived from plants that are grown only in certain parts of the world.

Topics Explored

- Market Environment
  - Outlook & Trends
  - Materials & Pricing
  - Environmental
- Markets
  - Food & Beverage
  - Medical
  - Cosmetics & Toiletries
  - Paints & Inks
  - Adhesives
  - Packaging
  - Textiles
- Products
  - Cellulose Ethers
  - Starch & Fermentation
- Exudate & Vegetable Gums
- Protein-based Polymers
- Marine Polymers
- Industry Structure
- Company Profiles (39+)
  - Akzo Nobel
  - Archer Daniels Midland
  - Cargill
  - Dow Chemical
  - DuPont
  - FMC Corporation
  - Metabolix
  - Sanofi
  - Solvay
  - And More

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Redefining Reality in Uncertain Times

Part one of this editorial identified five fundamental trends that can reshape corporate success and sustainable profit growth. I hear business leaders actively talking about these trends as separate entities. But it is clear to me that they are interrelated and must be taken as a whole to sustain profitable growth in this new age.

Consider speed. Analysts collect real-time data on what, when, where, and how we buy, and this information is used to create enormous marketplace advantages, from flashing online customers target ads to texting instant promotional offers.

_Pretzel Crisps_ used this to establish its brand quickly in the highly competitive snack market. By monitoring social media conversations to identify opportunities—namely customers looking for a snack—and physically delivering free samples. And it worked. Recipients conveyed their enthusiasm and positive experiences through tweets, blog posts, and product reviews. In one year, the brand delivered 3,600 free samples to consumers, garnered over 4.2mn earned media impressions, and saw sales increase 87%.

This exemplifies the competitive advantage of real-time marketing. Marketing is also the best way to communicate with Millennials and baby boomers, two generations that are fundamentally transforming the way we live. Basically, today both generations predominantly live in one- or two-person households, and retailers respond with smaller packaging.

Millennials are also significantly influenced by global trends—and this means we must have a global mindset. Look around the world at products and process innovations and you’ll find insights and ideas that you can use in your own market. Mark Rampolla first came across coconut water when he was volunteering in the Peace Corps in Costa Rica the early 1990s, and in 2004 he left a fast-track corporate career to pursue his dream by founding _Zico_, a company that uses _Tetra Pak_ cartons.

While taking such a chance is fraught with uncertainty, uncertainty may be the new status quo. The economy has affected us all, but its real lessons come from the side effects it’s imposed on many companies, such as a recent tendency for many to combat stagnant growth and low consumer confidence with expense reductions. Yet the best solution may be to embrace uncertainty and strive to grow through it by innovating.

_“The best solution may be to embrace uncertainty and strive to grow through it by innovating.”_ -Tetra Pak’s Zacka

*From: Michael Zacka, president and CEO of United States and Canada, Tetra Pak*
For the latest in market research, trends and data, visit Packaging Strategies’ growing library of studies, including these newest titles:

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Currently in the United Kingdom, milk jugs contain up to 25% food grade high-density polyethylene (HDPE) post consumer recycled content (PCR). The goal is to move that to 35% by 2015.

In the United States, there is no food grade HDPE PCR in U.S.-produced milk jugs and no plan to include it any time soon.

According to the Innovation Center for U.S. Dairy, 89.5% of milk sold in the U.S. is packaged in HDPE milk jugs. This is commendable because standardizing packaging allows for a great recycling infrastructure. Additional organizations have reported that Americans consume 20.6 gallons per capita of milk per year. With a population of 313.9mn Americans, that means roughly 6.5bn gallons of milk are sold annually with 5.75bn gallons sold in plastic HDPE bottles with no recycled content.

**Why Isn’t the U.S. Using PCR In Milk Jugs?**

Greenhouse gas (GHG) emission reduction is the main focus of the dairy industry right now. It is reported that 71.8% of GHG emissions are associated with feed production for cows and milk production while 3.5% of GHG emissions are related to packaging; therefore the focus is on feed and milk production. The industry’s sustainability stance on milk packaging is that plastic milk jugs are recyclable.

While this is true, as milk jugs are one of the most commonly recycled plastics in the U.S., there is no recycled content used in the production of milk jugs. Once milk jugs are recycled, that plastic is generally used in the creation of other packaged goods, but could easily be used in the production of milk jugs. It is a known fact that the production of recycled resin emits less energy and greenhouses gases than the production of virgin resins.

**Following In The U.K.’s Footsteps**

The scale of milk consumed in the U.S. is huge and the impact on GHG emissions could be tremendous if 25% recycled content was incorporated into milk packaging like in the United Kingdom.

Milk is sold in a variety of sizes of plastic in addition to gallons, but for this purpose the assumption is that with 5.75bn gallons of milk sold in plastic in the U.S., each jug weighs 65 grams. That would mean 820mn pounds of HDPE plastic is used to make milk jugs annually.

By inserting 25% recycled content usage into the U.S. Environmental Protection Agency’s Recycled Content (ReCon) Tool to calculate reduced emissions and energy use, annual GHG emissions savings will be equivalent to 82,297.38 fewer metric tons of carbon equivalent (MTCE) or 301,757.05 fewer metric tons of carbon dioxide equivalent (MTCO2Eq). This translates into taking 65,315.4 cars off the road annually.

By using the same 25% recycled content in milk jug production as the United Kingdom, the United States could see a huge reduction in GHG emissions.

In May, a company in England created the world’s first four-pint milk bottle containing 30% recycled content, estimated to save around 25,000 metric tons of virgin material a year.

If the dairy industry in the United States truly wants to focus its sustainability efforts on reducing GHG emissions, incorporating HDPE PCR in milk jug packaging is essential to that plan. The United Kingdom has proven that using HDPE PCR is safe, effective, and environmentally beneficial. Just like the United Kingdom, food grade HDPE PCR is available in North America and should be looked at as a component to the dairy industry’s sustainability initiative.

From: Tamsin Ettefagh, vp, Envision Plastics
Last month, the flexible packaging industry stood up and took notice when five leading packaging companies in North America and Europe announced they would combine to operate as one global leader under the banner of Exopack Holdings Sarl. The newly launched Luxembourg company, with aggregate revenues of more than $2.5bn, becomes the sixth-largest plastics packaging company in the world with a focus on flexible packaging. All five packaging companies are affiliated portfolio companies of Sun Capital Partners, Inc., a private investment firm.

Thomas Blaige, president, CEO, and chairman of Blaige & Company, understands private investment firms. The company’s clientele is comprised of private equity investors, corporations, and privately owned companies involved in the packaging sector. Blaige spoke at the 2013 Global Pouch Forum about the impact that financial strength has had on growth in the pouch industry and recently sat down with Packaging Strategies Newsletter to describe merger and acquisition activity in flexible packaging and what he predicts for the future financial stability of the sector.

**What is driving the activity and do you expect this to continue or slow down in the near future?**

Blaige: The momentum behind global consolidation is building as the large global consolidators (leaders) increase competitive pressure on small and mid-cap converters. Due to the high level of industry fragmentation, this will impact hundreds of flexible packaging converters in the U.S. alone. Our research shows that 58% of the leaders in flexible packaging merged or sold over the past 12 years. While this data suggests a high level of consolidation pressure at the top, the ultimate result is that the leaders in turn exert even more pressure downstream on the small and mid-cap converters.

In flexible packaging, the top five leaders control 35% of the business; the remaining 65% of the business is shared by more than 400 converters. In metal and glass packaging, the top five leaders control 80% to 90% of the business due to many decades of consolidation. As flexible packaging continues on a technology-driven growth trend over the next two to three decades, the industry will continue to move...
towards the consolidation seen in metal and glass packaging, as this industry also becomes less fragmented.

**Are pouches driving some of the growth? How is that affecting this market?**

**Blaige:** The primary driver of this growth is the conversion of other packaging structures to pouch structures. Firms in this market space typically adopt either an offensive or defensive strategy. Leaders in flexible packaging take an offensive approach and seek to develop or acquire pouching capabilities to expand their product offerings. Meanwhile, companies whose products are rapidly losing share to pouches (i.e., glass jars, metal cans and/or folding cartons) implement a defensive strategy by seeking to establish or acquire pouching capabilities to avoid losing volume from customers. Overall, the strong interest in pouching capabilities is creating increased demand for pouch converters.

**How is private equity affecting flexible packaging? Does private equity continue to be involved in many of these deals?**

**Blaige:** Private equity is involved in approximately one-third of the flexible packaging deals, which include platform acquisitions as well as strategic “add-on” acquisitions. Non-financial deals, therefore, have the greatest influence on the flexible packaging market; strategic deals, combined with financial add-ons account for roughly 80% of total deal volume.

That being said, there are certain private equity firms that have been very successful in building leaders in the flexible packaging industry. Companies that have benefited from private equity include *Constantia Flexibles*, *Berry Plastics*, *Ampac*, and *Plastics Packaging Technologies*, among others.

Private equity involvement appears to be increasing. The size of the industry, the favorable impact of materials conversion to plastic flexible packaging, the lack of cyclicality, and the technological orientation of the products make the industry attractive to investors.

**What impact has financial strength had on the growth of the flexible packaging industry? Has it contributed to more M&A activity or industry consolidation?**

**Blaige:** Private equity provides liquidity and efficiency to the flexible packaging market, as well as broader transaction options for owners. It could be said that private equity “greases the wheels” of M&A activity in flexible packaging because the use of private equity capital generally facilitates transactions. **PS**
The Prospects for Active Packaging in the New Global Marketplace

This landmark study addresses the use of active and intelligent packaging in today’s global marketplace as a critical driver of growth and profitability. In this report, key brand owners and packaging converters have shed light on how they are using active packaging in their packaging and products, what issues and challenges they currently face, and what needs must be met with these new tools.

Some Topics Explored

- Key Market Segments
- Emerging Technologies
- Processes & Practices of top CPGs
- Industry Forecast of the next 3-5 years in relation to active packaging

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Communication is the cornerstone of any relationship, and the speakers at the 2013 Global Pouch Forum seemed well aware that good packaging relies on listening to consumers and communicating back in a way that stands out and meets their needs.

Opening day keynote speaker, Michael Okoroafor, vice president of H. J. Heinz, began by quoting H.J. Heinz’s mission for his company, “To do the common thing uncommonly well brings success.” With operations in 200 countries, it’s clear this mission statement has worked for Heinz. The company recently did a common thing uncommonly well when it created the Dip & Squeeze Ketchup package. This package, which now seems like an obvious solution to the decades of frustration with the old model, not only earned Heinz widespread recognition and media coverage but also resonated with the consumer who had been struggling with the previous package. The Dip & Squeeze package offers new functionality in a condiment packet with dual dispensing, allowing the top to be peeled back or the condiment to be squeezed from the pouch.

According to Okoroafor, “Innovation is simply doing stuff consumers love and are willing to pay for.” Innovation is essential to packaging products, and consumer feedback is powering that innovation. During his moving talk, Okoroafor touched on the post-recession market in which consumers demand green, ethical, healthy products and packaging without high price points. Okoroafor also stated, “The consumer doesn’t need you to teach them. They just need you to listen.”

If smart innovation means responding to consumer demands Okoroafor suggested that flexible packaging has everything the consumer is looking for. Pouches meet consumer demands for sustainability because they are light weight, use less energy to manufacture, ship better, and take up minimal space in a landfill if they are not recycled. Flexible packaging also offers conveniences to the consumer by preserving food well, offering easy open features, and, sometimes, the option to prepare food in the pouch. Additionally, flexible packaging can do all of this and do it affordably.

Steve Callahan, president of Perimeter Brand Packaging, listed “knowing your audience” as one of the three ways to achieve better packaging structure. Callahan urged brand owners and packagers to look at the market adoption and innovation; observe the new jobs and expectations consumers assign packages, and tailor that package for the audience. He cited several examples of packaging tailored to the consumer including a baby food pouch that features a spoon attachment that can screw onto the pouch so parents can still feed their children without using a separate spoon.

Callahan shared a new pouch development that came as a result of talking directly to consumers. Most beauty cleansing wipes come in pouches, but consumers didn’t feel that pouch was appealing, appropriate, or even functional for preserving and dispensing the product. They also wanted to hear and feel the closure on the pouch. The result was a new type of package that not only meets consumer demands but also looks better and stands out on the shelf.

Driving the point home, Sal Pellingra, director of innovation at Ampac, and Diane Ray, vice president of...
strategic innovation at Natural Marketing Institute, gave an interactive presentation summarizing consumer reported trends in wellness, health, and sustainability. They offered detailed insight into consumer buying behaviors all while driving home examples of how the pouch is able to do the same or more with less. The flexibility of flexible packaging allows companies to meet the ever more specific and fickle demands of consumers. This same flexibility has also allowed companies to leap forward on the shelves and let consumers know what their product has to offer.

Packaging Tells a Story
Flexible Packaging Stands Out

The sort of listening encouraged throughout the Global Pouch Forum lends itself to a response. Not only can companies design packaging that meets the needs and wants of consumers, but they can use that packaging to tell a story, grab consumer attention, and generate buzz.

Showing an image of a blurred grocery aisle, Okoroafor told Global Pouch attendees that packaging needs to work harder to break through the noise of competing packages.

The simple upgrade to the ubiquitous ketchup packet earned Heinz extensive media coverage, coverage the company could not have afforded were they to try to buy it. With a fast-paced video clip of the Dip & Squeeze media frenzy, Okoroafor introduced a packaging trend that would ripple through the rest of Global Pouch Forum — packaging as media.

During Callahan’s talk, he referenced a comment from a director of skincare at a major CPG who said its packaging, on-shelf, is “crap at best.” Recognizing the need for a more appealing package, Perimeter took into account...
Navigating the sustainability roadmap can be difficult in and of itself in packaging, with many variations on a theme that meets corporate goals.

But in flexible packaging and pouches, the challenges can be especially acute. Not only do only select solutions exist to recycle materials efficiently and cost-effectively, but alternative materials have been a difficult trend line to embrace.

Yet, several speakers at the 2013 Global Pouch Forum brought differing insights into both the need to reuse materials and look for new options and potential solutions that may shift the discussion. Some of the need is arising due to the specter of extended producer responsibility (EPR), a global governmental initiative to shift the end-of-fine responsibility for products and packaging to the producers.

This could have bearing on the bottom line, according to Forum speaker Betsy Dorn, director of USA consulting for Reclay Steward Edge. Dorn said that instead of local government having to bear the costs to dispose or reuse packaging, both brand owners and their packaging suppliers will need to take on those cost burdens if policy is put in place.

“EPR is a reflection of a broader transition under way,” Dorn stated. Both municipalities and companies are attempting to better quantify the environmental impacts of carbon dioxide emissions and resource waste and to find methods to pay to reduce those impacts. Already, EPR legislation in some form is used in parts of Canada and in 27 European Union countries, while other product-stewardship policies are in place in India, Brazil, Japan, and many other parts of the world.

While that legislation could be a more difficult area to traverse in the United States due to a pushback from companies, some form of it for paint and other materials is being discussed, Dorn said. For pouches, EPR could benefit due to the options available for shape, laminate material, and printing available in the stand-up pouch, making pouches a versatile option for communicating brand story and standing out on store shelves.

Dennis Calamusa, president of AlliedFlex Technologies, rounded up the latest trends in pouch packaging, noting that the resistance to altering iconic packaging is fading as many recognizable brands supplement their traditional packages with updated pouch packaging.

Packaging Strategies’ Perspective: Consumers and brand owners want a lot from their packages. With advances and innovations in pouch packaging, the wish lists of attributes and functions are becoming realities. Convenience, savings, and sustainability are driving these innovations. PS
The 2013 Food Packaging Technologies Summit, held April 23-25 at the InterContinental Chicago O’Hare, offered a gastronome’s feast to the many issues, innovations, and trends that are part of one of the largest sectors of packaging. A key message introduced at the event: The food packaging industry continues to transform itself into new areas of growth while having to adjust to changing consumer and market realities. The conference, one of the few events worldwide focused on food packaging, discussed such important packaging issues as the elimination of food waste via packaging and better understanding the consumer audience.

“We must move from responsibility to opportunity. Think about those situations where sustainability can actually be a driver for innovation to take us to that next level.”

Nina Goodrich
GreenBlue/Sustainable Packaging Coalition

“The scale of the problem is enormous. Fresh and frozen food is five times more likely than any other food type to be wasted at the consumer level.”

Daniel Abramowicz
Crown Holdings

“[Edible packaging] This offers a convenient delivery system and provides great time savings for consumers on the go.”

Sumeet Kumar
MonoSol

“The more satisfied the consumer is with the packaging, the higher the probability the consumer will purchase that brand again. We have to think beyond aesthetics to focus on packaging’s performance.”

Steve Kazanjian
MeadWestvaco

“Though packaging is sometimes derided as wasteful, the product waste it saves has been calculated at 10 times greater than the waste it creates. It is something to keep in mind as we set two billion more places at the table by 2050.”

Elisabeth Comere
Tetra Pak

“The benefits of food packaging must outweigh the burdens. Where packaging is of benefit, it improves [product] sustainability. Assume we have to work together with the product to understand it and develop the best technology.”

Jeff Wooster
Dow Chemical Co.
Polypropylene (PP) is known for its light weight, its good chemical resistance, its rigidity, and its moisture barrier abilities. PP is both tough and flexible and is appropriate in a wide range of applications. It can be processed in a variety of ways, allowing for package design specifications to be met. PP has also traditionally been less expensive than other resins, but recent price hikes have eroded that advantage somewhat.

In cases where PP’s physical characteristics do not match those of other resins, resin producers can make PP more competitive by adding clarifiers or other additives, for example. Additives can be combined with PP both for aesthetic and performance enhancements. Initially, clarifiers are added to PP for marketing purposes, to give the package greater clarity and shelf appeal. Other additives can improve the stiffness and heat resistance of the resin.

To overcome its oxygen permeability, producers can co-extrude or layer polypropylene with barrier-enhancing additives or other resins (such as EVOH), allowing PP to maintain barrier protection for the product at the levels necessary for adequate shelf life in retail environments.

Polypropylene tends to be less suitable for thermoforming than other plastics because of its low melt strength. Pure PP is prone to suddenly sag onto the heaters during processing. Developers have been working on ways to increase the viscosity and elasticity of molten polypropylene, primarily by adding nucleators and creating copolymers.

With technical advancements, polypropylene now has a stable place in the refrigerated aisle of the grocery store. Polypropylene in Rigid Plastics Packaging by Priority Metrics Group puts its finger on growth trends and the markets where the material will have its greatest impact. The study looks at the global demand for PP; about 85.4bn pounds is being used worldwide and PP’s share of the rigid packaging market will grow by a CAGR of 5.9% between 2011 and 2016.
The Packaging Strategies eXTRA eNewsletter features the latest packaging news from PackStrat.com, www.flexpackmag.com, and www.foodandbeveragepackaging.com, links to Packaging Strategies’ website to read longer versions of our insightful articles, timely and relevant opinion pieces from our editors, and articles from Packaging Strategies’ sister publications. All this and more in a condensed, quick-read format coming every Monday, Wednesday and Friday to 2,331* subscribers.

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In a recent vote, the California Senate did not reach enough votes to enact a statewide ban on single-use plastic bags, which would have gone into effect January 2015. The bill needed 21 votes to pass but was only able to pick up 18 with four senators not voting. About 70 governments in the state have enacted bag bans so far; some argue the switch is easier on businesses if the ban is statewide instead of just in individual cities.

Senate Bill 405, sponsored by Senator Alex Padilla (D), would have outlawed grocery stores and large retailers from giving customers single-use plastic bags at checkout starting Jan. 1, 2015. The ban would have been expanded to smaller stores on Jan. 1, 2016.

Global wine packagers, Amorim and Owens-Illinois (O-I) are introducing HELIX, a cork-glass wine packaging solution for the still wine segment. The new twist-to-open concept combines an ergonomically designed stopper made from cork and a glass bottle with an internal thread finish in the neck. HELIX can be implemented by wineries with a minor adjustment to existing filling lines.

In extensive testing conducted by Amorim and O-I, wine packaged in HELIX glass bottles with cork stoppers showed no alteration in terms of taste, aroma, or color. As part of the development process, market research in France, UK, USA, and China revealed consumer acceptance of HELIX as consumers appreciated retaining the ‘pop’ associated with opening the bottle.

Sirane’s new Sira-Flex Resolve bags and films offer extended shelf life for fresh fruit and vegetables by optimizing the atmospheric conditions inside the pack to prolong freshness and enhance the quality, taste, and texture of the food. Trials using the packaging film with mushrooms showed a shelf-life increase of seven days – without browning or condensation. And the potential for even longer shelf life is on the horizon.

Sirane is preparing to release a new pad that will inhibit bacteria growth.

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Padilla’s ban on bags is busted.

HELIx is a cork-glass wine packaging solution for still wine.

Sira-Flex Resolve packaging with grapes.
A First in the U.K.

The 1.5-liter version of Nampak’s Infini bottle has finished its trial period and will be the first of its size on the U.K. market. The new bottle, which took six months to develop, was created as a more convenient option for consumers who require more than one pint of milk but fewer than two pints. However, Nampak said that it also has many other advantages for all members of the milk supply chain.

Nampak said that its Infini bottle is more lightweight and the 1.5l Infini weighs 26g – the same as a standard 1-liter bottle. It also offers consumers a new choice between a 2-pint (1.136-litres) and 2-liter option. According to Nampak, Infini is also better for the environment than a standard bottle because it contains 15% recycled high density polyethylene (rHDPE) and is 100% recyclable. Muller Wiseman Dairies will be the first to offer its milk in the new package.

In other Nampak news, the company’s outgoing chief executive, Andrew Marshall, said the firm plans to invest in expansion in Africa. In a trading statement, Marshall said the company recently raised $175mn in the U.S. private placement market and the proceeds will be used to fund African expansion.

Pre-Sliced Products

Amcor Flexibles has launched Packpyrus, a thermoformable cellulose-based packaging solution for the fresh market. Its oxygen barrier is particularly suitable for pre-sliced products like meat or cheese. Packpyrus is available in three versions: Packpyrus Flexible for vacuum pack base webs, and Packpyrus Semi-Rigid and Packpyrus Rigid for modified atmosphere base webs. Amcor is claiming that the Packpyrus Flexible and Packpyrus Rigid solutions offer a reduction in the cradle-to-gate carbon footprint of about 70% and 60%, respectively.

The Birth of a Bottle

Nestlé Waters has created a new ReBorn 500ML water bottle that is made with 50% recycled PET, requires 15% less energy to produce, and is used for its Arrowhead brand of water.

Most of the recycled material for the ReBorn bottle comes from CarbonLITE, a plastic processing facility in Riverside, CA, according to an article from Californian’s Against Waste. Nestlé Waters has committed to adding rPET to its business as it becomes more economically feasible, the company has said. Currently, there isn’t enough recycled plastic available to make 100% rPET bottles, the Arrowhead website claims.