
Consumer Trends in FMCG and its Implications for the Packaging Industry



Campbells Soup Company

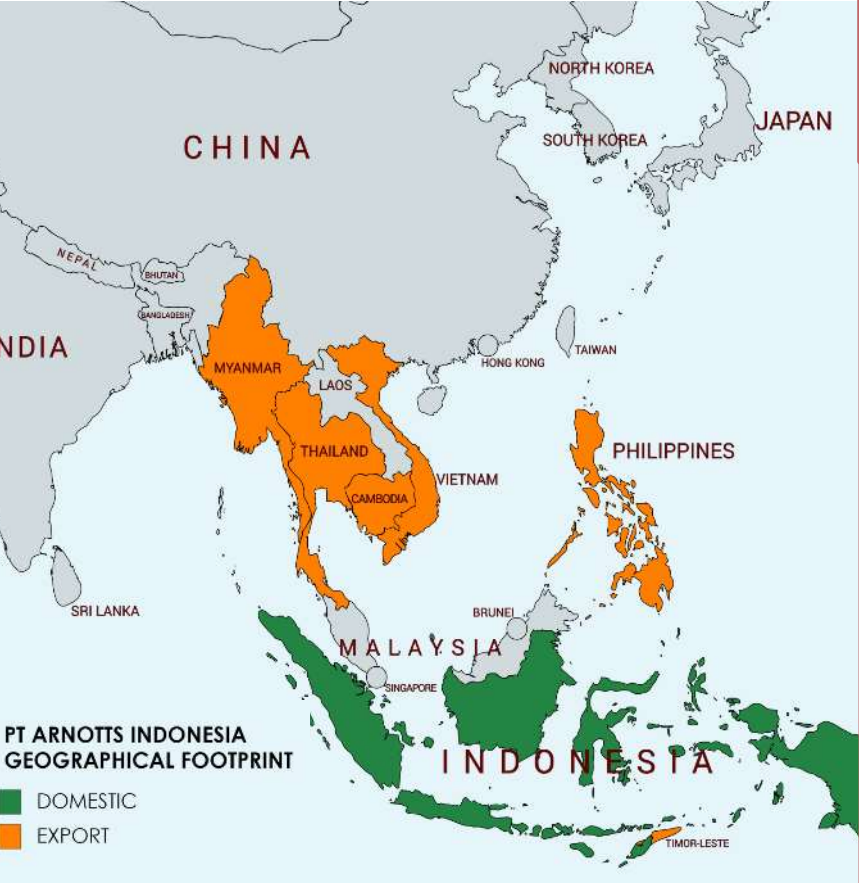


- \$8Bn global food co. based in Camden, NJ, USA
- Makers of high-quality soups and simple meals, beverages, snacks and packaged fresh foods
- Distributed in over 120 countries
- Campbell Soup acquired Arnott's Biscuit co. in 1997
- Presence in Indonesia
 - 1995: JV with a local co.
 - 1998: PT. Arnott's Indonesia acquires 100% ownership



PT. Arnott's Indonesia BU covers a cluster of 7 ASEAN countries with e2e capability

PT Arnott's Indonesia serves a SEA cluster population of ~600 million*



Iconic Brands with over 20 Yrs of History

End to End Manufacturing Process with 2 Factories in Indonesia

R&D & Innovation Capabilities within Indonesia

Strong RTM reaching over 55000 stores and 13Mn households



* Source Statista 2018

Consumer Trends that call for Pack Innovations

1



Seeking Value

Luxury	Exclusivity is the new status - I have what few people have
Mass-tige	Accessible Luxury
VFM	Making smart choices
Cheapest	Give me access

2



Authenticity

3



Sustainability

4



Portion Control



Consumer Trends that call for Pack Innovations

5



Digital Opportunity

6



Immersive Experience

7



Immediate Convenience

Evolution of Packaging in Today's Market

Active & Modern Lifestyle

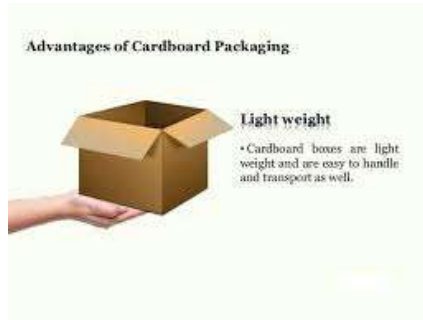
- Easy open, easy use, informative nutrition content. Anytime, anywhere consumptions.
- “Snackifications” drives a portable & small portion pack



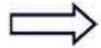
Evolution of Packaging in Today's Market

Eco-friendly, Sustainable yet Cost Effective

- Less Usage, thin/lightweight materials yet durable & less cost



PET bottle



© Canadian



Pouch



- Environments cautious – call to eco friendly actions, Rethink plastic! More uses of recycled material



Bio-degradable bottle



REMEMBER YOUR REUSABLE BAG!



NO MORE PLASTIC BAGS



Evolution of Packaging in Today's Market

Interact closer/longer with Consumer/Shopper

- On shelf appeal – innovative shape, special effect ink ...
- Delivers product experience life – bring the fun thru digital app
- Multi purposes shipper – transport & display function (POSM)



Download **Stamp Me**
Scan Unique Code



Get **FREE COFFEE**
and more



& Project LOOP, a possible Revolution?

- By 2050 plastics expected to outweigh fish in the ocean
 - Micro-plastics in air, water, food....
- Leading global FMCG cos are working on **Project LOOP** to reduce waste
- Announced at WEF, Davos and getting launched in NY & Paris in May 2019
- New way to shop 300 items including Tide, Häagen-Dazs...
- Stainless steel, Glass, Aluminum, engineered plastic containers good for at least 100 use
- Free delivery and servicing of LOOP tote at your door step



CLOROX DISINFECTING WIPES



Further Disruptions Expected in Future

- Digital commerce & online
- More ideas on sustainability, low cost, ultra light material
- Flexibility solutions to support activation/promotional activities
 - Lower MOQ & shorter lead-time
- New Printing technology
- Smart Packaging – Talks to consumer ie. thru Integrated barcodes, QR code, RFID, etc
- 3D manufacturing



Expectations for Our Packaging Partners

- Continuous Innovation and disruption
- Efficiency
- Act as business partner/consultant not just as a supplier



***Success breeds complacency. Complacency breeds failure.
Only the paranoid survive.
Andy Grove***