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FUTURE of PACKAGING

PTIS, LLC

The Future of Packaging: The Next Generation

Who will participate in the Future of Packaging multi-sponsor program?

Our sponsors are Fortune 100/500 along with leading small and mid-size companies across the value chain and include leaders in packaging-connected industries (raw material suppliers, converters, brand owners, retailers, and equipment providers).

What are some of the key topics that will be covered?

The program delivers pre-competitive collaboration as well as insights and action plans for participants on the opportunities and challenges they face over the near and long-term future. We will explore trends, new transformations and drivers impacting packaging and present a futures view and critical implications for:

- **The World in 2035**—Macro trends impacting global business and how they will influence packaging
- **Technology Transformations** moving to reality and the changing face, including AI, AR/VR, Blockchain, automation, robotics, Metaverse, Remote Work, Virtual Programs, impact on packaging development process and more
- **The changing consumer/customer**—Exploring social change and its impacts on brand, packaging, lifestyles, and consumption
 - The future consumer's path to purchase—how Brand Purpose, e-commerce and omni-channel changes, mobile technology, and packaging will merge and shift in the next decade
 - A new and renewed focus on inclusivity across companies providing all consumers with enhanced convenience and Brand Purpose via packaging
 - How Millennials, Gen Z and new emerging markets will change the game
 - The impacts of e-commerce in transforming retail
 - Social and digital media's impacts on the consumer, and packaging
 - How consumers will use products and react to packaging in the next decade
- **The digital marketplace and Artificial Intelligence**—How these technologies will transform packaging and the new availability of key data is changing the commercial landscape, production, and retail (especially post-Covid)
- **The future of production and Solving Supply Chain Preparedness and Transformation** — Emerging forces are reshaping how we produce, package, and distribute and return goods. Now approaching major tipping point from co-manufacturing to customization to enhanced reverse logistics We will also discuss the synergies and opportunities between packaging and the supply chain
- **The Circular Economy (CE)**—Expect to see big changes continue and accelerate as a result of new collaborations, legislation and more locally and globally. We are in a transformational stage with packaging waste and climate change. Working toward Net Zero will be critical and ESG will become the norm for companies
- **The Internet of Packaging**—How packaging companies will apply the Internet of Things to packaging—data analytics for packaging takes the lead. Look to see this effort tie closely with Industry 4.0 and help to significantly help improve Packaging efficiency and effectiveness and reduce food and packaging waste

- **Science, technology, and innovation**—Top research leaders and technologies (structure, functionality, retail/ consumer technology integration) primed for impact over the next decade. How smart technology allows packaging to interact with the consumer
 - New approaches to Innovation—only half the value chain currently uses an Open Innovation tool/process—we explore how it will change
 - Collaborations—leading companies, NGOs, research institutes partner to make a bigger impact than they can on their own. The successful collaboration models.

- **The changing packaging value chain**—Critical topics:
 - The changing brand owner and retailer—globally and locally
 - Changing work for the future to Hybrid/ virtual and tools
 - Small companies become leaders in the future with collaboration as a key driver
 - Required skills and capabilities for the future
 - Retail of the future and the emergence of a more effective omni-channel solutions
 - Organizational Structure—what do successful companies do to foster innovation and what will the future packaging skill base be to deliver successful innovation?
 - Growth and importance of machinery and equipment in packaging
 - New value chain components like certifications and EPR globally and Locally
 - Packaging best practices to deliver growth and productivity
 - What the Future State for packaging looks like over the next decade and integration of all the changes into 3,5- and 10-year roadmaps by each part of the value chain

As a sponsor, what do I get?

Deliverables include:

- **Three sponsor meetings**—participation for two representatives at three two-day sessions with presentations and discussions on the program’s critical change topics
- **Numerous cross value chain working sessions and social networking** sessions with other leaders
- **Understand the latest new technologies and work going on** and its implications for packaging in the future (tied to the different site locations where the meetings are held)
- **Topical briefings and report**—on all topics explored
- **Meeting summaries** – brief overview of each of the three meetings to share with others in your organization
- **Executive conference summaries**—from the FoP team as they attend and report on relevant conferences, and prepare summaries of key insights for the program sponsors
- **Top Critical Insights and Outcomes, Implications and Action Steps** to be able to move quickly to the next normal
- **Value Chain strategy roadmaps**—0-3, 3-5 and 5-10-year strategy roadmaps for different parts of the packaging value chain

What approaches and methodologies will we use?

Proven PTIS and futurist techniques include foresight processes/ tools, and our, wide-ranging subject matter expertise. Expect to see global thought leader surveys and proprietary and secondary research, as well as new proprietary studies in science and technology and consumer insights in the 2035

program. We employ as well, critical insight downloads with participants, future scenarios, cross impact analysis, Well Curve analyses, and other tools that deliver on-the-point results that can be applied to for successful packaging outcomes.

My company has been a sponsor in the past. What's new this time?

This program will reflect the changes to the global economy of the past three years to focus on post Covid changes, changed economic circumstances, shifts in local and global forces, increasing urgency and “buy-in” to global climate change concerns, as well as development of new ideas and approaches post Covid to be able to be more prepared for the future. **Consider the newest transformations across materials development, business practices, societal impacts, legislative implications among other areas.** We will review the *Top 8 Program Insights* from the 2032 program and deliver updates.

Dates and timing?

The program begins in late January 2025 and will conclude by October 2025, to allow sponsors to use the information in their 2026 strategic plans.

Three sponsor meetings with on-going data/knowledge updates between the meetings. The second meeting will be in the late spring (May). The capstone meeting in September/early October 2025 lays out the 3 and 10-year roadmap and action plans across the value chain for incorporation into 2026 strategic planning sessions. Note that strategies and actions will be broken out by value chain component and by timeframe: 0-3 years, 3-10 years.

Will you be benchmarking current best practices?

Absolutely, global knowledge and insight will be used throughout the program, and we will identify best and next practices. In addition, the PTIS and futurists team will be attending key conferences related to packaging. The program will provide sponsors with on-going executive summaries from these conferences. We have already attended several conferences in 2023 and will be including summaries on the sponsor website.

What commitment is expected from a program sponsor?

There is no commitment by our sponsors to contribute any work to the program; the Future of Packaging team does the research and analysis for you. But we strongly urge you to plan to attend our three sponsor meetings, and be ready to share your questions, wisdom, and insights on what's happening in the packaging sector with the group. **The power of this program is in bringing leading packaging executives across the value chain together in a pre-competitive atmosphere for a joint focus on the current state and future state of packaging.** Networking discussions are a highlight of the sessions and new collaborations have been developed between people and companies that offer extreme value. The attendees enjoy the end of day one reception along with freedom to meet with other sponsors at lunches and dinners.

What is the 2025-2035 roadmap and how will it be created?

The Next Generation Packaging roadmap will take the insights gained during the program, including key collaborative input from program sponsors, to create a focused view of how forces of change will reshape packaging. It will interpret that change for each part of the value chain and offer an action plan with key milestones for 0-3 and 3-10-year horizons.

How will you integrate global customer initiatives into the thinking?

The FoP Next Generation Packaging (2035) Program will explore all parts of the packaging value chain and, since most of the sponsors are global companies, we will integrate North American and global perspectives for each part of value chain. The team will provide local, global and Glocal foresights and insights throughout the program.

How will the program present all this information in ways we can use?

The program will culminate in a set of incisive and specific findings you can use in your organizations. Part of the third sponsor meeting will be a focus on effectively communicating results of the program to your company and connecting them to your strategy.

organizations as we explore, define, and shape the Future of Packaging. The program concludes with both a Senior Leadership summary and Top Insights to Actions that sponsors can use at the CEO/Board level to show the importance and value of packaging for companies in the future.

A highlight will be exploring possible and likely futures through building scenarios that can help your company/organization prepare for the unexpected. Often recognized as one of the most important foresight tools, and the most powerful to communicate, our scenarios project future outlooks and what they mean for packaging.

We hope that you find this list of Frequently Asked Questions to be helpful. As always, if you have more questions, or are ready to be a program sponsor, please contact a member of the Future of Packaging: Navigating New Horizons team.

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