

# touch

## **2020 – One Step Beyond**


How packaging design can push the boundaries

March 2020

# insight innovation & design





A blurred photograph of a brick building with a thatched roof. In the foreground, there is a large, dense green bush with yellow flowers. The image is out of focus, emphasizing the text overlay.

Our studios are situated just outside of London on a beautiful country estate in Maidenhead, just 30 minutes from Heathrow airport.

Come and see us!



**The futures bright?**



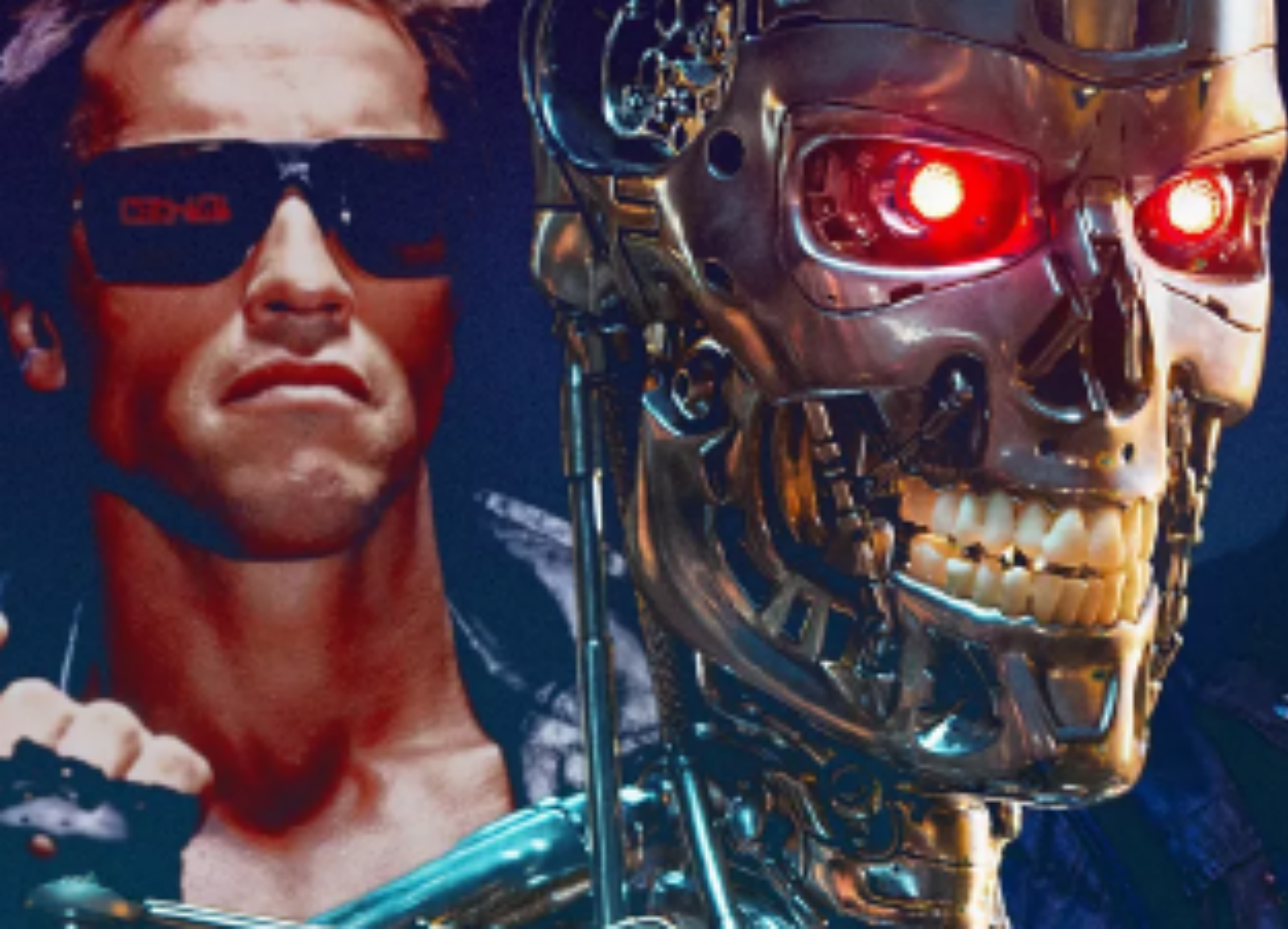
**UTOPIA**

**DYSTOPIA**



**artificial optimism...**





THE  
TERMINATOR



**I'll be  
back**



**Reality check**

# Will this 'trend' go away?

- Climate change and loss of bio-diversity will increase
- As will education on the environmental impact of our behaviour
- Creating paradigm shifts for consumerism.



# The linear economy – take, make, dispose...

1900  
**0.5**  
million  
tonnes/day  
(0.5 MILLION TONNES/DAY)

2020  
**3**  
million  
tonnes/day  
(3 MILLION TONNES/DAY)

2100  
**12**  
million  
tonnes/day  
(12 MILLION TONNES/DAY)

Global consumption currently needs 1.5 planet earths to sustain itself and this will increase with the rising middle class.

In future, if everybody in the world consumes at US levels the world needs **4 planet earths**.

# Seeing is believing

- Increased public understanding of ecological issues will particularly involve our relationship with:
  - **Food**
  - **Energy**
  - **Plastic packaging**
- In the immediate-term, packaging will continue to dominate the discussion
- It's visible...





# Connected consumers

- It's now acknowledged that our consumption status quo causes **environmental & societal damage**
- Spotlight on supply-chain **ethics** & the definitions of 'Fairtrade'...
- Who wins and who loses as we move into a new era?
- "Climate justice".



# New consumer expectations

- **Social media** – informed choices
- **Guilt free** shopping experiences
- **More sustainable** products delivered via more sustainable means
- **Invest in the green economy** whilst divesting from the **brown economy**
- Companies, products and services are **under scrutiny.**



Protecting habitats together



**ZED**  
zero emission deliveries



# Consumers are fickle!

- We can't STOP... our identity is more wrapped up in what & how we consume more than ever before
- GenZ represent a step-change in the way we use social media to reflect identity
- Curating a projected lifestyle via the brands and experiences they convey
- Drunk isn't **Insta** worthy
- Big tobacco is bracing for the revolution in future highs.





# Changes are coming

- Carbon footprint pack labelling by retailers is on the horizon
- There are multiple variations being considered by industry bodies
- Consumers may start to consider how far their grapes have come!



**Carbon neutral**





# Environmentally & economically driven

- Recycling reforms are predicted to cost UK FMCG businesses anywhere between £1 - £2 billion a year
- Packaging Recovery Notes (PRN's) = fee paid by manufacturers to recycle their products (currently **10%** cost)
- Government reforms = **90%** for manufacturers to fund recycling programmes.

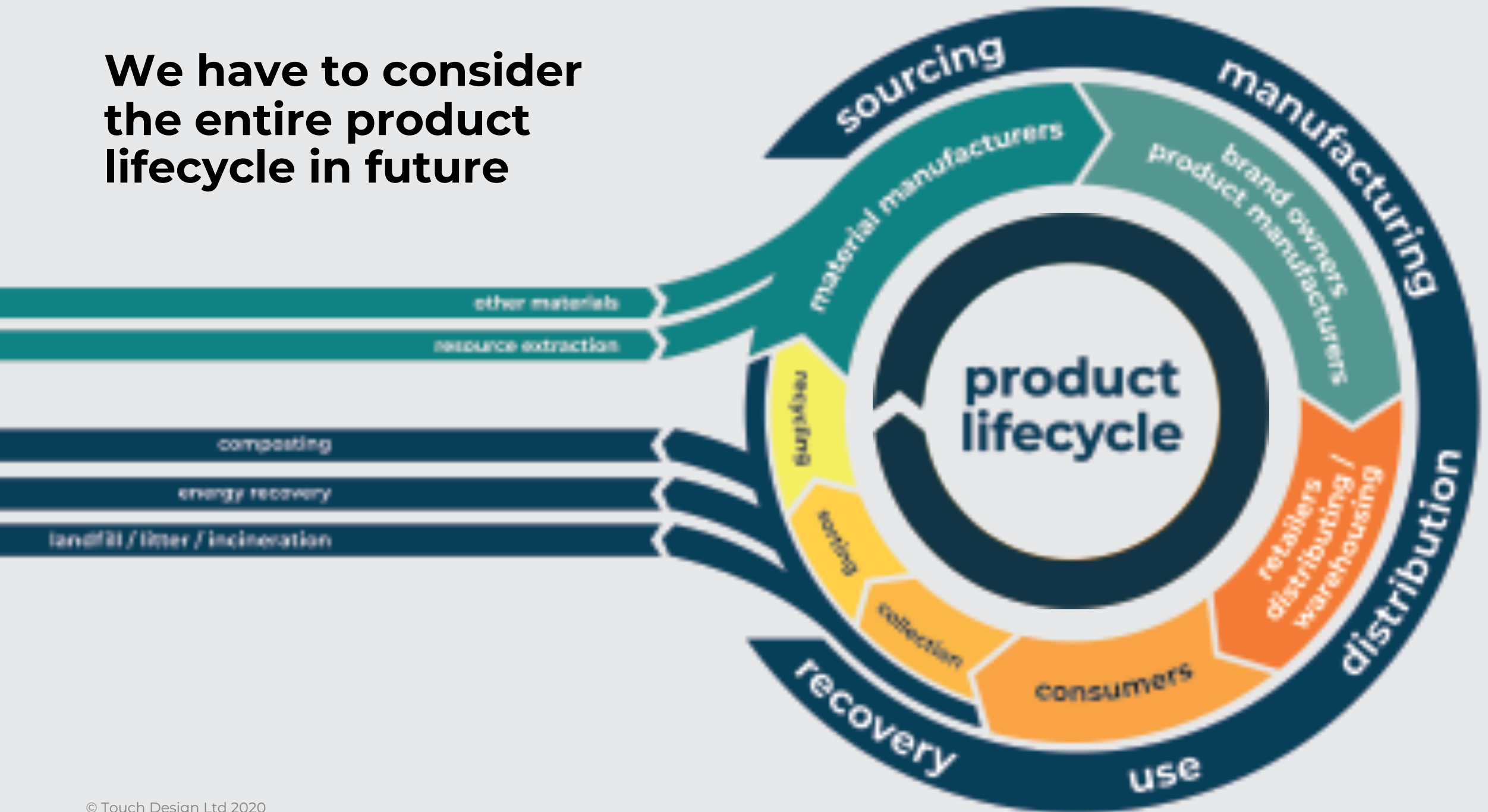


# Circularity – big shift / big money

- Moving away from linear (brown) to circular (green) economy
- €500 billion over a ten year period for the European Union (3.6% growth cumulative)
- Winners & losers, depending on the agility of products, businesses & industries to develop “closed loop” circularity.



**We have to consider  
the entire product  
lifecycle in future**





# Materials matter

Ray-Ban “premium” case upcycled from 2 **Coca-Cola cans**.



- Halved component count
- Reduced case cost by 47%
- Increased case recyclability
- Engaged consumers in a sustainability story
- Retained the premium attitude & appeal.





# Minimal material

JugIt system based on flexible bags of milk.  
90% less plastic than an equivalent plastic milk bottle.



# In the loop

- Refillable durable packaging used to be the norm, so why did we move away from the milkman model?



# Return economics

**Pack cost**  
\$8.30



**Cost p/use**  
\$0.083

**100+ uses**  
Asset to brand



## Designed for circularity

- Following successful trials in the USA & France, Loop is due to roll out in 2020
- Support from Tesco in the roll out and scale up for UK this year
- A new premium retail model experiment that could totally shift the retail landscape.



# “Closed loop” material options

When it comes to the circular economy model, there are three globally accepted pack materials.



	19	1	1
Weight p/30ml	19	1	1
Kg CO2 per new 355ml container (UK average)	0.11	0.12	0.152
Energy saved when recycled	13%	95%	90%
Recycle rate (UK)	45.7%	75%	59%
Recycle rate (US)	33%	55%	30%
Max recycled content	50%	100%	100%
Number of recycles	infinite	infinite	4 - 10 x
Recycle value per ton (2019)	£14 - £21	£940 - £1020	£170 - £222



**Products & packaging will evolve**



# The future of glass?

- Indestructible = easily returnable!
- Advances in ceramic technology and in particular aluminium have lead to the development of aluminium oxynitride
- A glass clear material capable of stopping bullets.



# Working WITH plastic

- Plastic with a nano layer of glass
- Fully recyclable
- In future, could dovetail with chemical recycling
- A revolution in plastic technologies that could impact life as we know it!



# Carbon negative materials

- Tree's take carbon dioxide out of the atmosphere making them **carbon negative**
- Developments in material production to replicate this phenomenon
- CO2 from the atmosphere is processed to create plastic polymers
- These are the world's first carbon negative materials.



We are pulling carbon out of greenhouse gas emissions to make plastic

Mark Henema  
CEO, Newlight Technologies

# Paper bottles

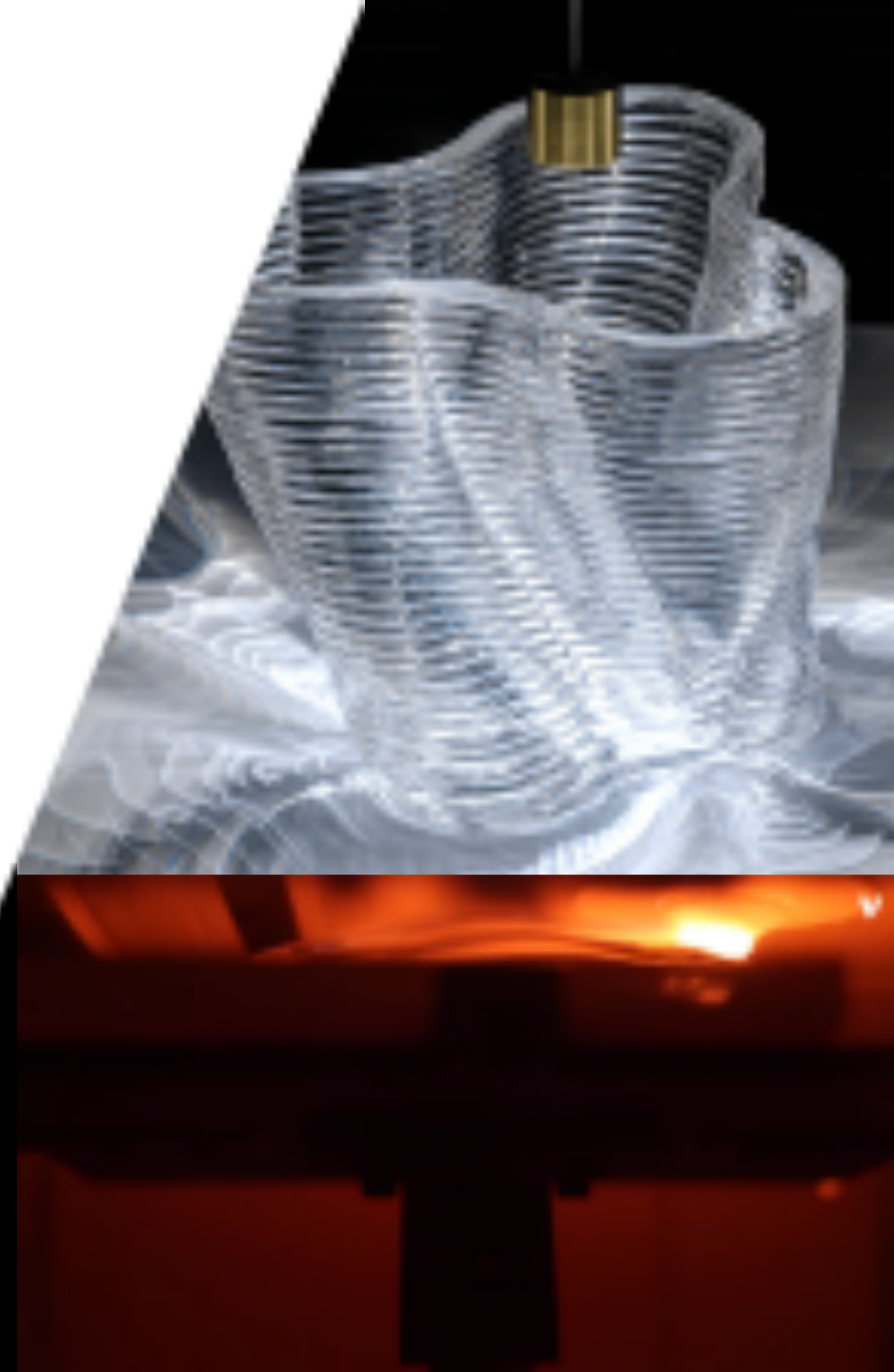
- Under trial with our clients TAC & Carlsberg
- Significant investments granted to commercialise
- R&D to increase repertoire, portfolio & sizes.





# 3D print revolution

- Already come a long way
- We can print in plastic, metal, ceramic, food, drink, houses & glass!
- State of the art – 500ml bottle in 5 minutes
- Personal & industrial
- Open-source & sharable
- 3D printing bottle factories.



# Animated pack decoration

- Rapid developments in LCD **flexible** screens
- Moving image, live billboard, advertising rolling out in retail spaces
- 50% of screens produced by 2025 will be flexible, bendable, foldable!
- Technology will become cheap enough to apply to FMCG products in future.



# Conclusions



- The elephant in the room is **carbon**
- Catalysing a move from the brown to the **green** economy
- Packaging will adapt dramatically
- The wine category could be a leader, ***primed for a packaging revolution*** or become a reactive follower
- Either way, **change is coming.**





## we are touch

A brave innovation partner with global reach, creatively building on consumer and business insights to consistently deliver technical and commercially feasible brand and business growth.

We excite and challenge via thought provoking crafted graphics with game changing commercially led structure.

A photograph of two men in an office setting. The man in the foreground is wearing a grey hoodie, a black cap, and glasses, and is smiling while looking at a laptop. The man in the background is wearing a blue sweater and glasses, also smiling. The desk has various items including a white mug, a green water bottle, and a small blue and white milk carton. The background shows a window and some office equipment.

## the touch team

A collective bunch of industry experts - from insight gatherers to graphic & product design specialists.

Our close-knit award-winning team consistently delivers time & time again, generating strong innovation growth for businesses.



# why touch?

We understand people.

We listen to you to deeply understand your brand and business thinking – we then treat your brand like it's our own and grow holistically as strategic partners.

We are agile, competitive and exceed expectations time and time again.

# 16%

**purchase intent  
increase**

**winner of 27  
design awards,  
including gold  
DBA, FAB,  
Brand impact,  
and Drum  
awards.**





# 35%

reduction in  
plastic, saving  
almost £1m pa  
in plastic costs





**10%**  
increased sales  
across range

**20%**  
reduction in  
plastic, saving  
almost £500k pa  
in plastic costs

**5 year**

**unbreakable  
patent**

**the world's first  
widget for the  
Guinness brand.**





# insight innovation & design





# innovation at the level your business needs

Generating fast, low/ no capex quick wins using current production assets through to insight & technology led game changing ideas.

Creating innovation pipelines & long term packaging route maps allowing for future proofed production equipment & engineering line flexibility.

## touch

Up to 1 year  
Quick Wins

## reach

1 to 2 years  
Minimal Capex

## stretch

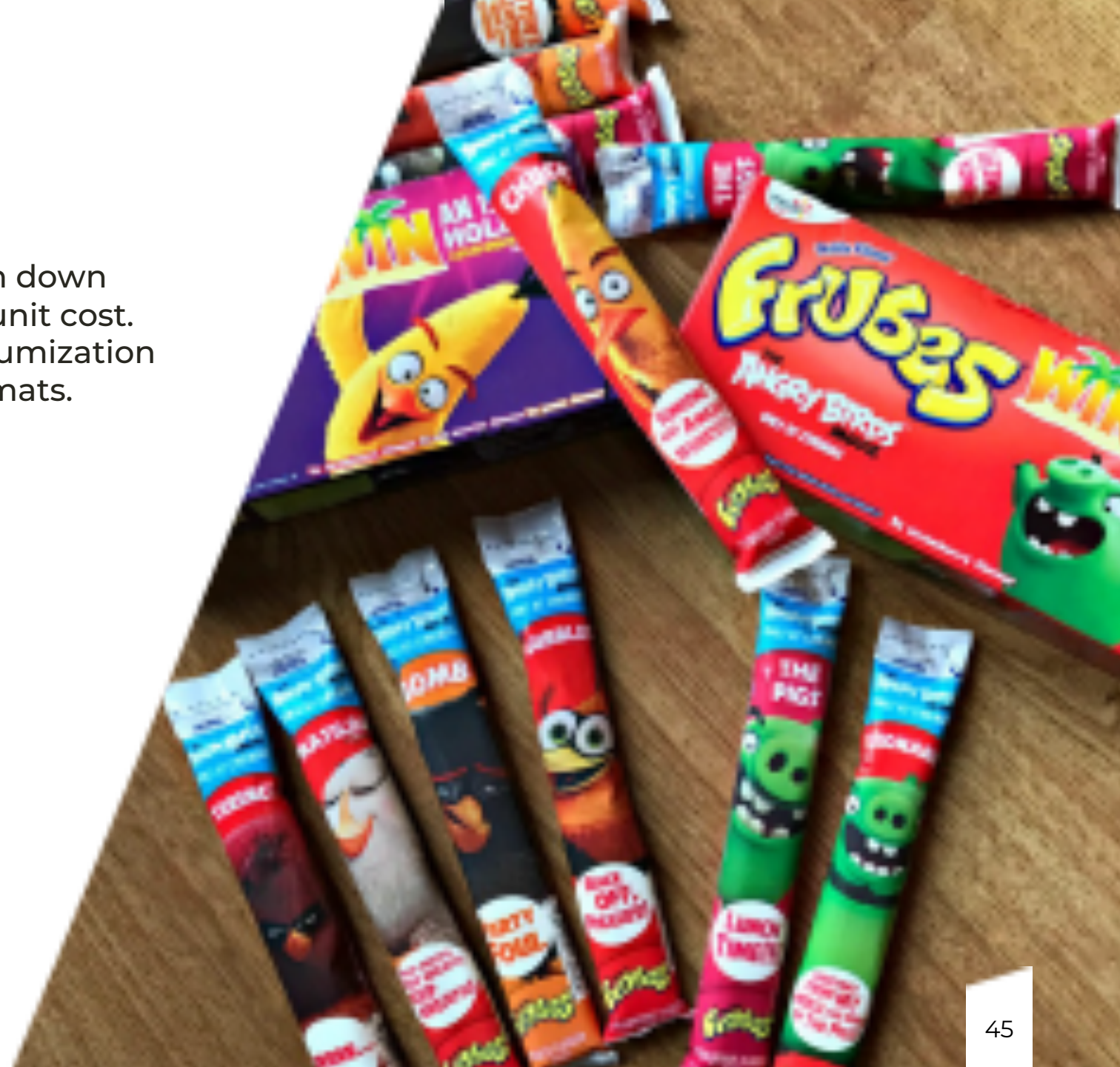
2 to 5 years  
Capex Required

# touch up to 1 year

New product launches that are able to run down existing lines resulting in no/low capex & unit cost. Generating emotional benefits and premiumization with the introduction of new/adapted formats.



40% category growth  
52% reduction in pack materials  
Same product retailed at 20% on cost  
Transforming yogurt consumption  
New usage occasions  
Product sold at premium



# reach

1 to 2 years

Feasible unit costs & run rates which are achievable through line adaptations, change parts or new external suppliers offering shake-up within the category and bigger business opportunities.



LUCOZADE RIBENA  
SUNTORY

Delivering a better experience

10% increase in sales

Reduction in PET saving almost £500k pa



# stretch

2 to 5 years

Installation of new production lines allowing for commercially viable, game changing, BIG ideas which offer huge business opportunities.

## DIAGEO

A draft experience at home  
Creation of a patented in can draft  
delivery system





# fast-track innovation

Time and budget can be an innovation restrictor.

With decades of collective experience, our fast-track process enables us to create research ready concepts that are: brand inspired, consumer desired, commercially viable and technically feasible in weeks not months.



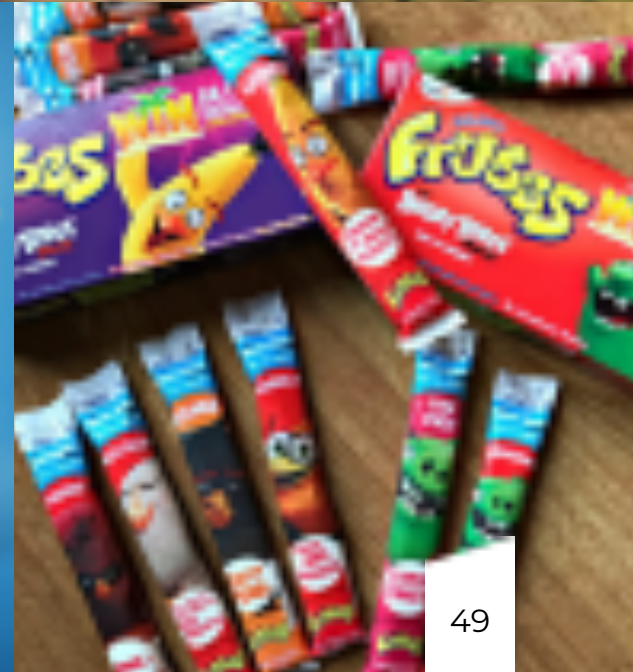
# fast-track requires more pragmatic responses to innovation needs

Technically feasible– sweating existing production assets for quick wins through to game changing innovation

Commercially viable – considered and sympathetic solutions created in line with your business ambitions & objectives

Time efficient – a fast track streamlined programme, planned and executed seamlessly

Cost-effective – branding and structural specialists focused on delivering an effective, differentiated brand & consumer experience



# fast-track innovation

4 – 6 weeks



**kick off**



**ambition  
workshop**



**create**



**develop**



**validate**

week 1



week 6

# future proofing

We're helping our client partners reimagine how their product formats can evolve to generate new consumer benefits and business opportunities.

Our **future proofing innovations** process enables our clients to ascertain the key opportunities as well as the barriers to get there... Working collaboratively with our clients in the most efficient way possible.







## future proofing

“if I had asked people what they wanted they would have said

**Faster horses...”**

Henry ford



1800



1900



2000



2025

# future proofing requires **stretch thinking**

We consider what's happening now and where you can win in future. **Touch have the ability to work across any time frame...**

But our **future proofing** process considers what's happening within the **stretch** area, to help you get ahead of the curve when it comes to innovation.

touch

Up to 1 year  
Quick Wins

reach

1 to 2 years  
Minimal Capex

**stretch**

2 to 5 years  
Capex Required

# consumer insight

what's happening now in the world of cleaning



## rising hygiene concern

Consumers are more aware of hygiene, germs and bacteria driving the demand for home surface care disinfectants with anti-bacterial properties.



## cleaning less often

Consumers want time saving options that work in the context of busy their life styles. 23% of European consumers are willing to pay more for self-cleaning surfaces, and 18% would pay more for self-cleaning fabrics.



## less packaging

The need for packaging will be reduced as the concentration of cleaning formulations continues to increase.



## eco-friendly

With growing health and environmental awareness, consumers are increasingly expected to opt for eco-friendly products.



## increased technology

The use of microprocessors, sensors and automatic metering of detergents will increase.

This will reduce the amount of energy and water and required for cleaning.

# what's happening now?



**Splash**



**Ecover Refill**



**YVY**



**Replenish**



**Jaws**



# stretch thinking

what could happen in the future?



## good germs

Cultivating good germs to prevent dirt and odor by using biotechnology and microorganisms.



## self clean

Self-cleaning technologies and fabrics that help prevent the spread of germs.



## on demand services

No fuss subscription or on demand cleaning services.



## next gen technology

Yesterday's science fiction in tomorrow's normal...

# future – proof process



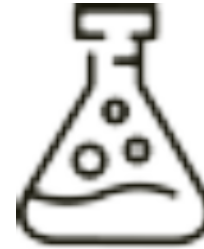
**absorb**



**immerse &  
explore**



**cluster, connect  
& reveal**



**innovate**



**test**

# packaging sustainability

Consumer and customer awareness around sustainability is on the rise, with packaging being at the forefront of the conversation. As an industry we should all be working towards a sustainable future.

Our deep process, material science and technology knowledge combined with our industry connections, puts us in a unique position to help our clients understand, plan and achieve their sustainability objectives.



# sustainable brand growth

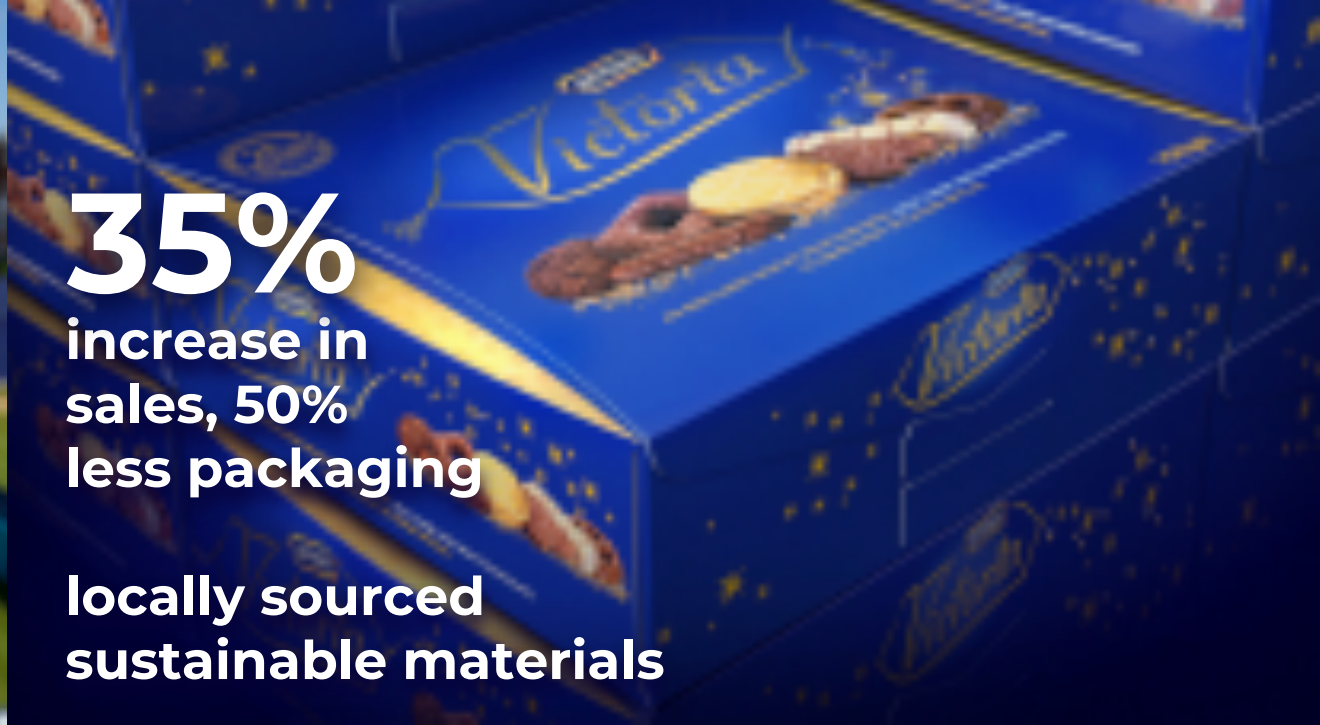
We believe sustainability initiatives are also an opportunity to grow brands and make stronger consumer connections.

When we prevent physical waste and improve efficiency we save money and increase margins. Add to this the chance to deliver improved consumer relevance and build a stronger brand presence, we unlock the opportunity to sustainably build brand growth.





**100%**  
recycled  
plastic, now  
the nations  
#1 water brand



**35%**  
increase in  
sales, 50%  
less packaging

**locally sourced  
sustainable materials**



**103%**  
uplift in sales,  
Half the packaging,  
recyclable,  
Minimal factory  
impact,



**0%**  
zero-waste  
packaging &  
an improved  
consumer  
experience

# trends reporting

Touch are constantly looking at the macro trends influencing the future of the FMCG industry.

As a result, we are well positioned to help our clients consider the issues facing them now and in future as a result of trends within their category, or macro trends influencing everyone in the FMCG world and beyond.





# consumer insight tools



## ethnographic research

Working globally and closely with consumers in a variety of settings to uncover insights and design opportunities



## touch tv

A targeted and scalable digital portal into the lives of consumers and their habits.



## packaging playground

Hands-on design qual groups, to explore challenges, test design theories and strengthen and optimise potential solutions

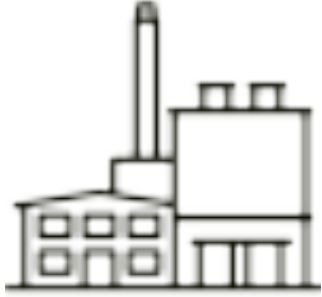


## trends analysis

We predict future trends as well as work with market leaders to understand macro shifts in categories



# business insight tools



## factory audit

Our team understand current production processes and identify processing and machine opportunities for structural packaging innovation



## technology trawl

We explore established and cutting edge technologies and show you how you could leverage them



## value chain analysis

From cradle to grave we examine every aspect of your products life, to identify opportunities and insights



## market audit

We examine your category and parallel categories in local and global contexts to gain market and product insights





# end to end innovation process



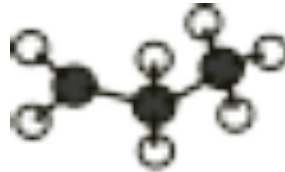
## absorb

Understanding what we want to achieve, what we know already and what we still need to know



## immerse & explore

Understanding the market, gathering fresh insights, spotting design and manufacturing opportunities



## cluster, connect & reveal

Making connections, forming design hypothesis and strategic creative platforms based on your challenge.



## innovate

Our joined-up thinking creates exciting new ideas, which fulfil real consumer and business needs



## design & validate

Our expert design team bring the innovation opportunities to life, from initial sketch, prototypes for validation, to full design Implementation

# design process



## explore

Exploring all aspects that will inform the design process



## create

We quickly transfer our ideas into consumer engaging, commercially viable and technically feasible concepts



## develop

Developing favoured concepts through to fully rounded 2D & 3D design solutions



## refine

Design refinement of concepts inline with consumer and business feedback



## implement

Final design and artwork sign off inclusive of production specification, supplier selection, production trials and a smooth transition of data

# smart partnership

We regularly work with a number of global partners to help inform and share insight.

Along with with our global partners we engage with suppliers and academia's on new and revolutionary technologies coming to the fore.



## 2D & 3D working in harmony

We believe the best results come from working with fully integrated branding specialists.







Returnable packaging system

## the challenge

With an ever increasing focus on reducing waste We were tasked with generating a reusable (at least 100 times), durable and widely recyclable 1 pint container for Häagen-Dazs which would become part of the Loop doorstep delivery system.

Loop is a global shopping system and reuse model developed by TerraCycle – the global recycling experts. An innovative subscription service for food and household good brands.



# the loop system

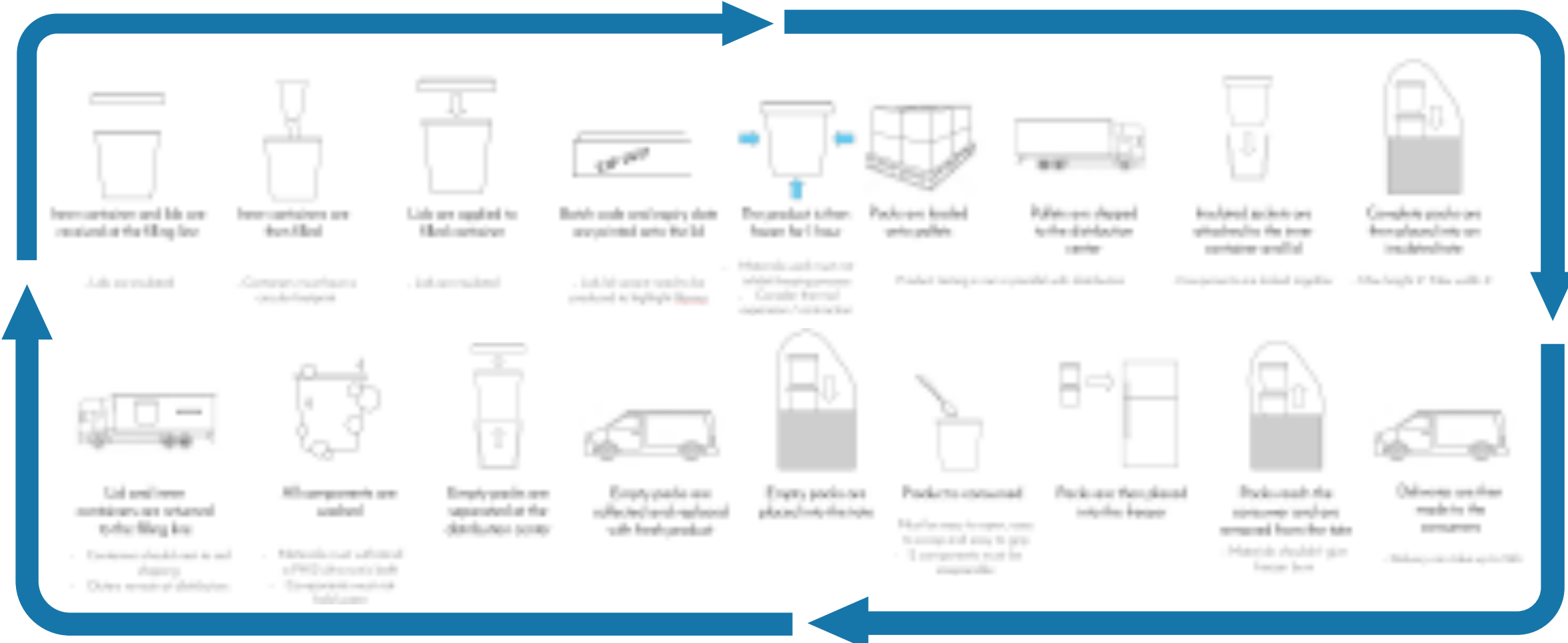
A wide range of global brands have now signed up to the Loop system offering consumers a no fuss, closed loop shopping experience.

No more hassle from trash and recycling, consumers simply drop their used empties back into the Loop tote and schedule a free pick-up from their home.

Instead of getting a box every month, the tote bags are automatically replenished with the products that are sent back. Ensuring that favourites are available as and when the consumer needs them.



# simple idea – complex supply chain





# technology trawl

With the design implications this challenging product lifecycle brings, coupled the need for recyclability at end of life, we conducted a material and process technology trawl to identify potential the optimum way forward.

Our trawl included materials and processes that:

- Are recyclable at end of life
- Are sustainable
- Are able to withstand low temperatures
- In the case of the outer and lid, insulate the product
- In the case of the inner, do not inhibit product freezing
- Create a tamper proof component lock
- Are robust enough to withstand 100+ journeys (format and decoration)
- Able to withstand a PH12 and ultrasonic cleaning process without holding water



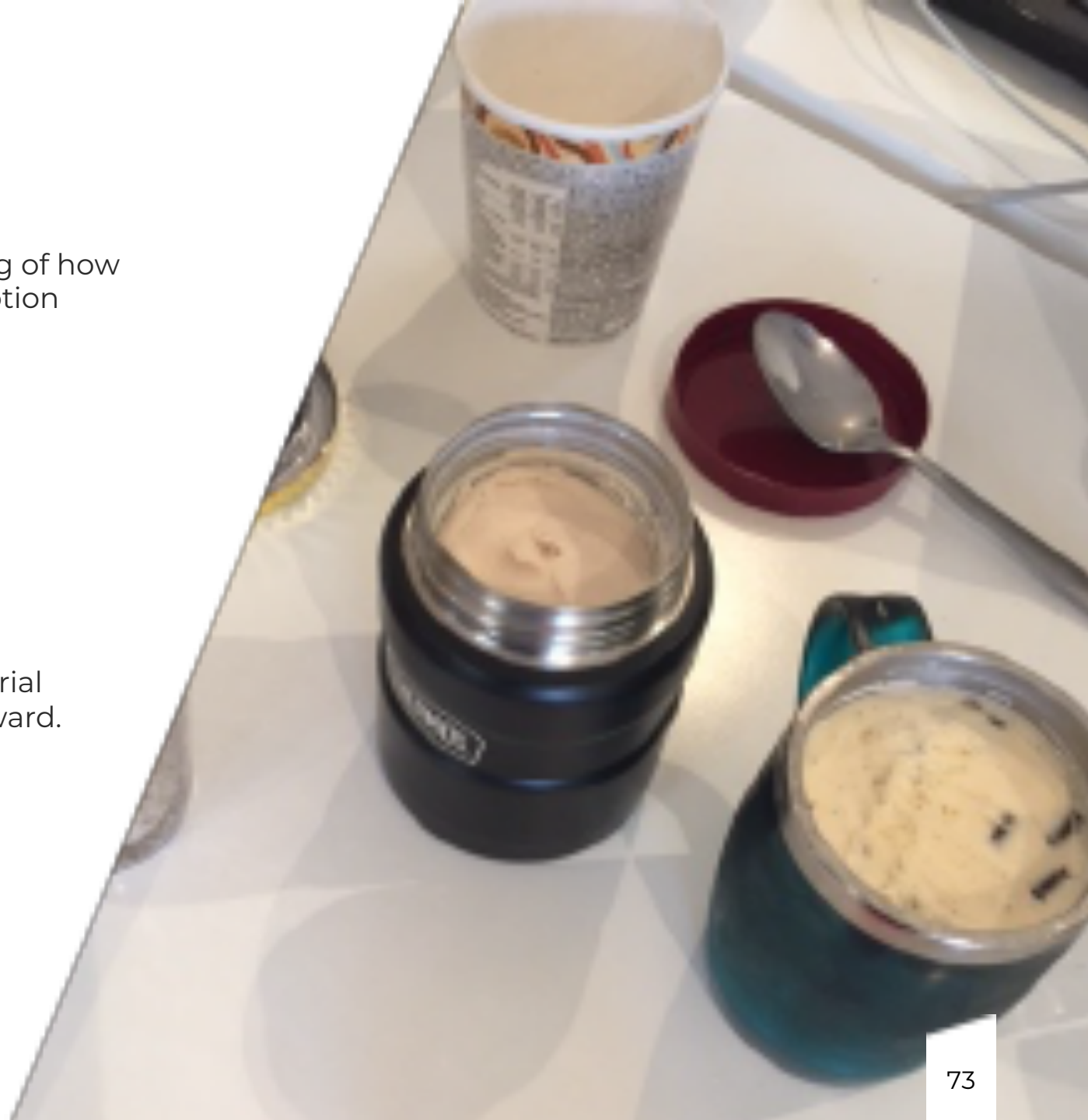
# product and pack journey

A wide range of existing materials and containers were gathered and tested to give us a greater understanding of how the product behaves through its storage and consumption journey.

We tested parameters such as:

- How the product freezes
- Ease of consumption
- re-freezing
- In hand feel
- Scoopability.

This allowed us to make clear decisions on which material combinations would be best for our designs going forward.



# creative platforms

Before pen was put to paper we delved into the world of dairy and ice cream to build platforms which would inspire our designs.

These platforms explored how the products behaved, their textures and the forms that they created along with the implements used in their production and consumption.



Illustration of various product forms and colors.



Illustration of various product forms and colors.



Illustration of various product forms and colors.



Illustration of various product forms and colors.



# concept generation

Based on our usage testing findings and aesthetic platform explorations, a range of initial designs were produced. These early designs were used to explore form, functionality and pack life cycle along with materials, branding and graphic expressions.





# pack design exploration

We were also tasked with bringing the concept to life in a graphical way. We explored a range of design concepts each addressing the key messages for pack design - taste, natural, fresh ingredients, all with a simple and clean execution.

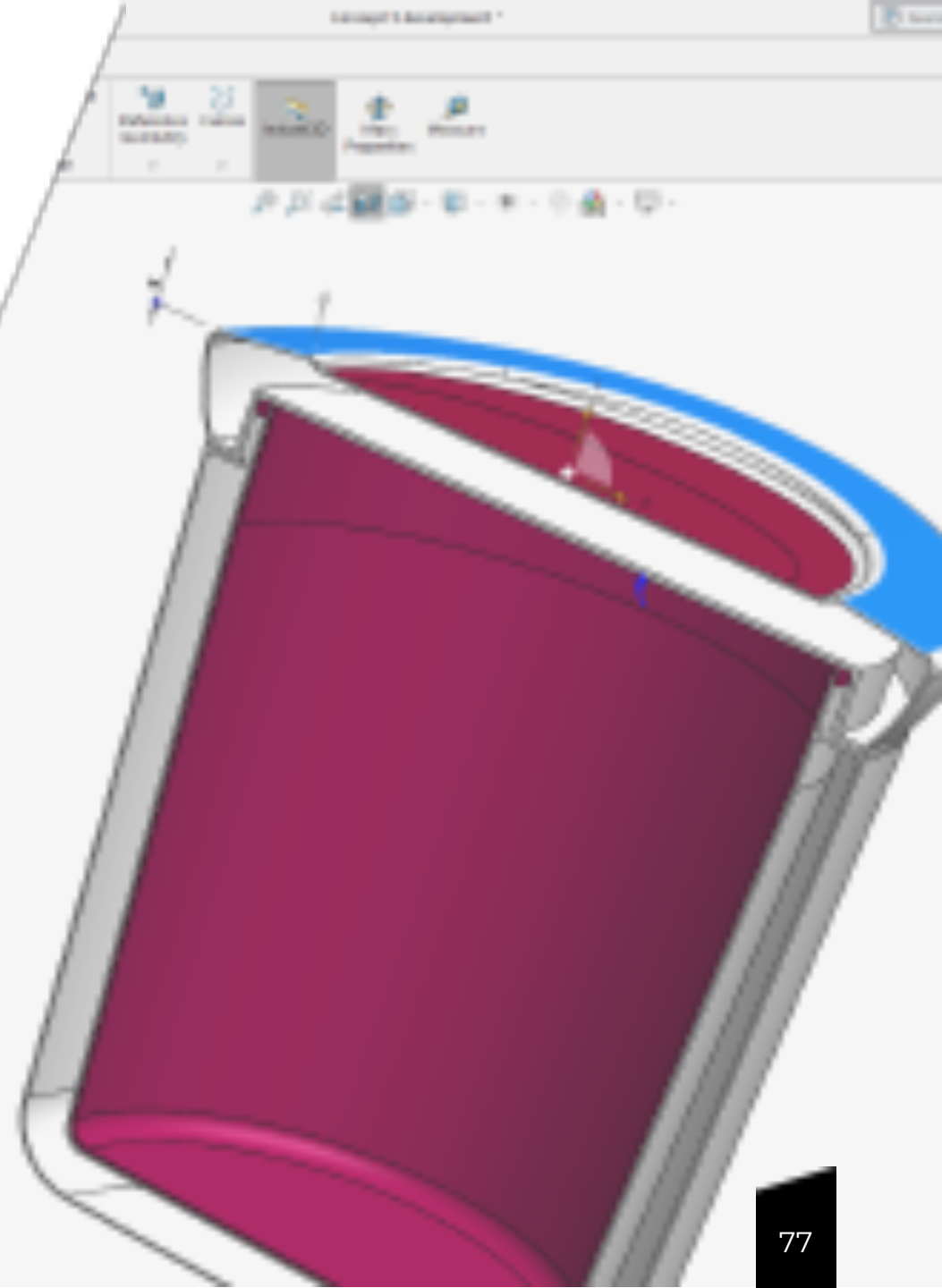
Leveraging the 'tapestry' asset and exploring printed textures to fully optimise the design and usage experience.



# technical development

Throughout the concept stage of the project, all designs generated were built using accurate 3D CAD in order to give the packs the ultimate functionality and usage while ensuring 100% manufacturing feasibility.

Once a final design was selected, this technical attention to detail was carried through to ensure that the pack would be ready for production. During this phase the design team worked very closely with the manufacturing partners to create a smooth transition from design through to production. This close partnership allowed us to develop the design technically while maintaining all of the design intent from the initial concept.



# final design

With all parties aligned a final design was produced and technical design files were produced for manufacture.

In parallel with the manufacturing process, pack designs were developed to ensure that the finished pack would have the desired link back to the brand.



## final product

Now available as part of the Loop system.

*“Thanks Touch team for your partnership to make this revolutionary packaging a reality - you can be proud!”*

*The Häagen-Dazs packaging made a big impression in Davos (World Economic Forum), it's one of the most iconic designs currently offered on LOOP!”*

Olivier Jakubowicz  
Global Category Leader - Nestlé Ice Cream  
Strategic Business Unit





Carlsberg  
EXPORT  
*J. G. Jacobsen*

# the challenge

Carlsberg Export is Carlsberg's premium extension of the core brand Carlsberg.

In recent years the brand has seen a decline in sales and had been delisted in major retailers.

The challenge was simple, give consumers a reason to re-evaluate Carlsberg Export as a premium Danish beer.



Before



# exploration

Before getting creative we spent time in the factory with the production team to fully understand the constraints and flexibilities we had to work within.

We also held stakeholder interviews with key Carlsberg personnel as well as suppliers to understand ambitions and supplier capabilities.



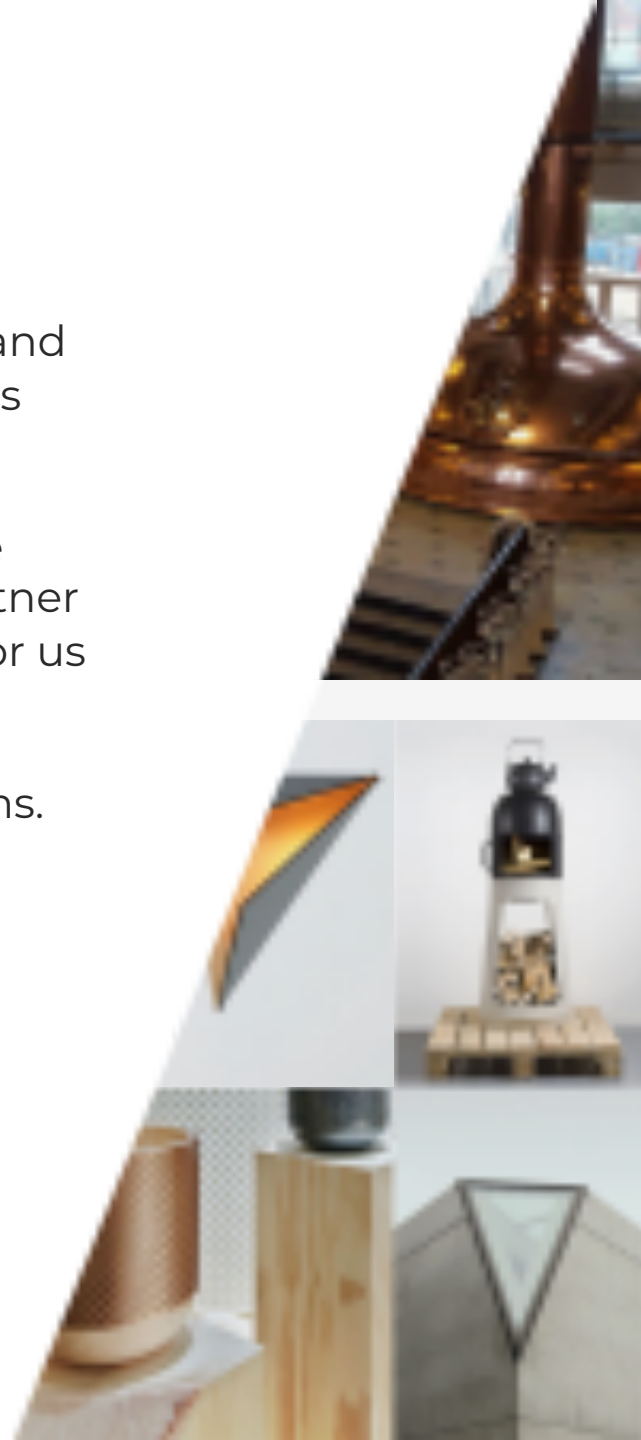


# the danish story

Key to success was to discover and define a Danish story consumers could believe in.

From the start of the project we worked holistically with the partner brand agency TAXI. A key tool for us both was to use visual planning exercise's that leveraged our combined 2D and 3D specialisms. These helped us to define every aspect of the brand in a fully integrated way.

From tone of voice to materials and finishes we with explored a range of ideas with consumers to direct creativity.



## PEOPLE: Happily Balanced

The Danes have got it just right. Be it work/life, form/function or 'hygge' (the cozy juxtaposition of a cold exterior paired with an inner warmth), they know that balance is the key to happiness. At Carlsberg, we share this perfectly balanced philosophy – it's all part of our Danish DNA. Our ability to balance art with science, quality with time and tradition with invention is why we're probably the best beer in the world.



## Original. Contemporary. Danish. (DCB)

The simple Dinsberg was the first of its kind, with its bold white cross leading the way for the rest of Sørensens's flags. In this case we borrow from our brand's perfectly proven, minimalist flag design to create an effortlessly stylish system.





# creative exploration

To bring our stories to life we generated a wide range of creative across both on and off trade structures.

Our creative also included addressed technical and commercial objectives, ensuring feasibility from the outset.



# on bar appeal

Early on consumers were unanimously drawn to our “Original Contemporary Danish - OCD” concept. Which combined, draws its inspiration from Danish furniture design and the proportions of the Dannebrog – the Danish flag.



# iterative development

Following clear consumer and business guidance we developed each of Carlsberg Exports structural assets.

Regular supplier and client team meetings ensured a smooth concept to implementation transition.



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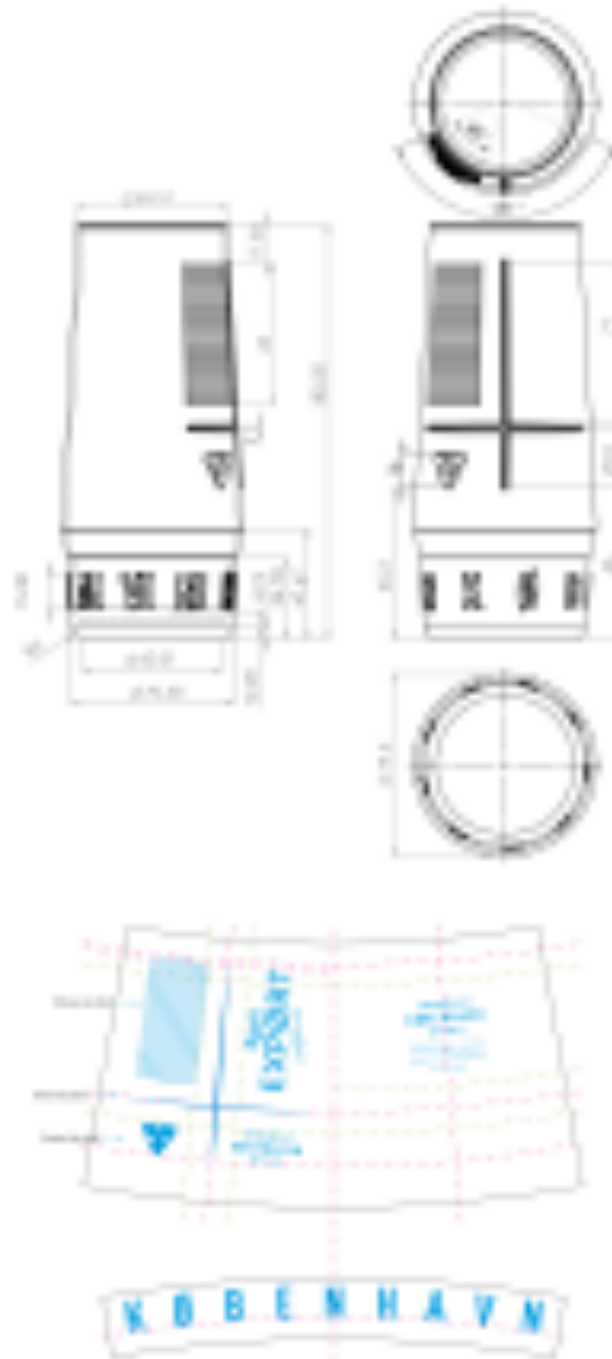




# refinement

From concept lock we developed final 3D CAD, artwork files and specifications for supplier handover.

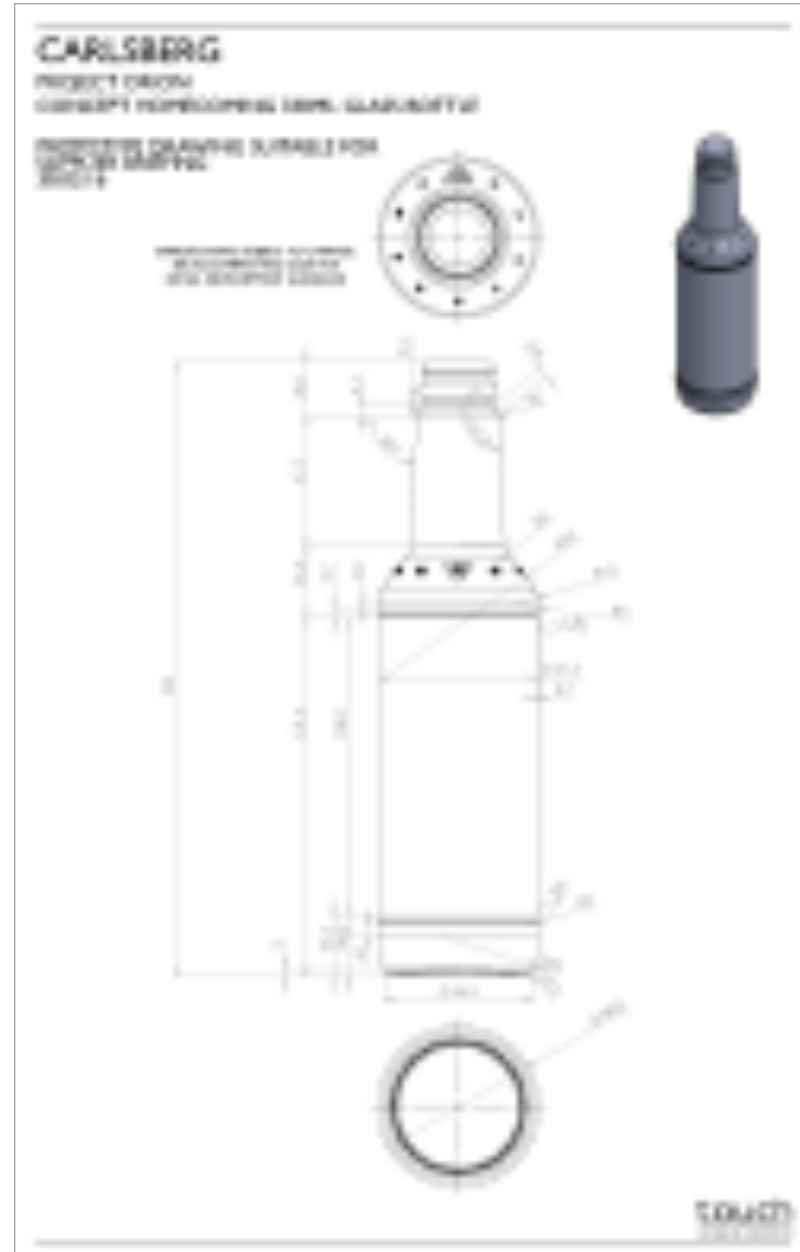
We also produced animations of various elements to tell the Danish story and excite internal stakeholders.



# iterative development

Following clear consumer and business guidance we developed each of Carlsberg Exports structural assets.

Regular supplier and client team meeting ensured a smooth concept to implementation transition.



the result







# thanks

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