



The European Shopping Baskets

# European Shopping Baskets Program

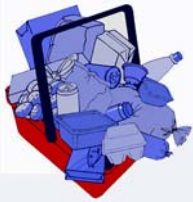


EUROPEAN

The European Organization for Packaging and the Environment



STFI-PACKFORSK



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# Aim

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To create a platform for a packaging dialogue based on facts, that can be used to demonstrate the complexity of existing packaging system.



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# ESB Program

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***3 year project initially***

- Starting with 2005-data***
- Second collection 2007***
- First phase to be completed 2008***





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# The Outcome

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- 1. Demonstrate the interrelationship between packaging system components.***
- 2. Illustrate the complexity of meeting various and conflicting demands.***
- 3. Permit companies to bench-mark own packaging with an European average.***
- 4. Data to link packaging to demographic & social trends and to national preferences.***

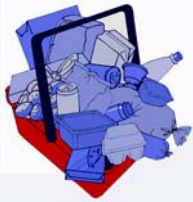


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## The Outcome / Cont.

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- 5. Provide robust data to build positions / refute unjust assertions.***
- 6. Provide insights into Industry's efforts to support sustainable development.***
- 7. Create a platform for fact based on stakeholder dialogue.***
- 8. Offer a qualitative/quantitative aid to development of packaging/waste policy.***



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# Management

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**Management Committee (MC)**

**Technical Working Group (TWG)**

**Stakeholder Committee (SC)**

**National Co-ordinator (NC)**



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# Country selection

Criteria
<b><i>Number:</i></b>
Population (as % of EU 25)
Percentage of total EU 25 Member States
<b><i>Specific countries:</i></b>
Regional and cultural diversity
North / South representation
Range "old EU 15" / "new EU 10 "
Range high and low / capita packaging consumption
Range of high and low GDP / PPS
Range of high and low population density
Availability of qualified National Co-ordinator
Availability of reliable data



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# Country Selection

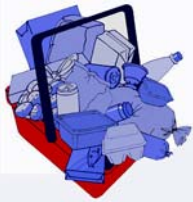
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**Estonia, Finland, Italy, Poland and the UK**

**– represent 40% of EU-25 population**

Country	Pop Millions	Population density per km2	GDP per capita	Packaging consumption*
<b>Finland</b>	<b>5,2</b>	<b>15</b>	<b>25.500</b>	<b>86,7</b>
<b>Estonia</b>	<b>1,4</b>	<b>31</b>	<b>11.500</b>	<b>-</b>
<b>Italy</b>	<b>57,3</b>	<b>191</b>	<b>24.600</b>	<b>198,3</b>
<b>Poland</b>	<b>38,2</b>	<b>124</b>	<b>10.900</b>	<b>-</b>
<b>UK</b>	<b>59,3</b>	<b>224</b>	<b>27.800</b>	<b>166,8</b>

\* based on available but questionable Commission data



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# Product Selection Method

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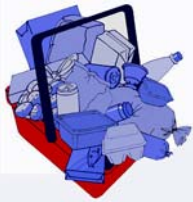
**Methodology has been developed, further refined and agreed with AC Nielsen**

- confidence that methodology is robust
- data reliable and up-to-date

**Each national Shopping basket will contain approximately 100 items.**

- selection will mirror what people in a specified country typically purchase over a specified year.
- products in general will be everyday commodities purchased in grocery stores covered by AC Nielsen

**The study will cover a number of years starting with 2005.**



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# Product Selection Method

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**ESB categories are based on a harmonised set of 54 categories recommended by AC Nielsen**

**ESB product category ranking / product selection is critically dependent upon obtaining annual sales figures (in units sold)**

**If information not available from AC Nielsen, then alternative market data will be used and with the help of the National Coordinator products identified**

- **criteria documented**
- **more subjective judgement**



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# Product Selection Method



- 54 product categories identified
- Leading brand from each product category identified
- More than 1 leading brand for the largest categories





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# Product Selection Method

## ESB Product categories

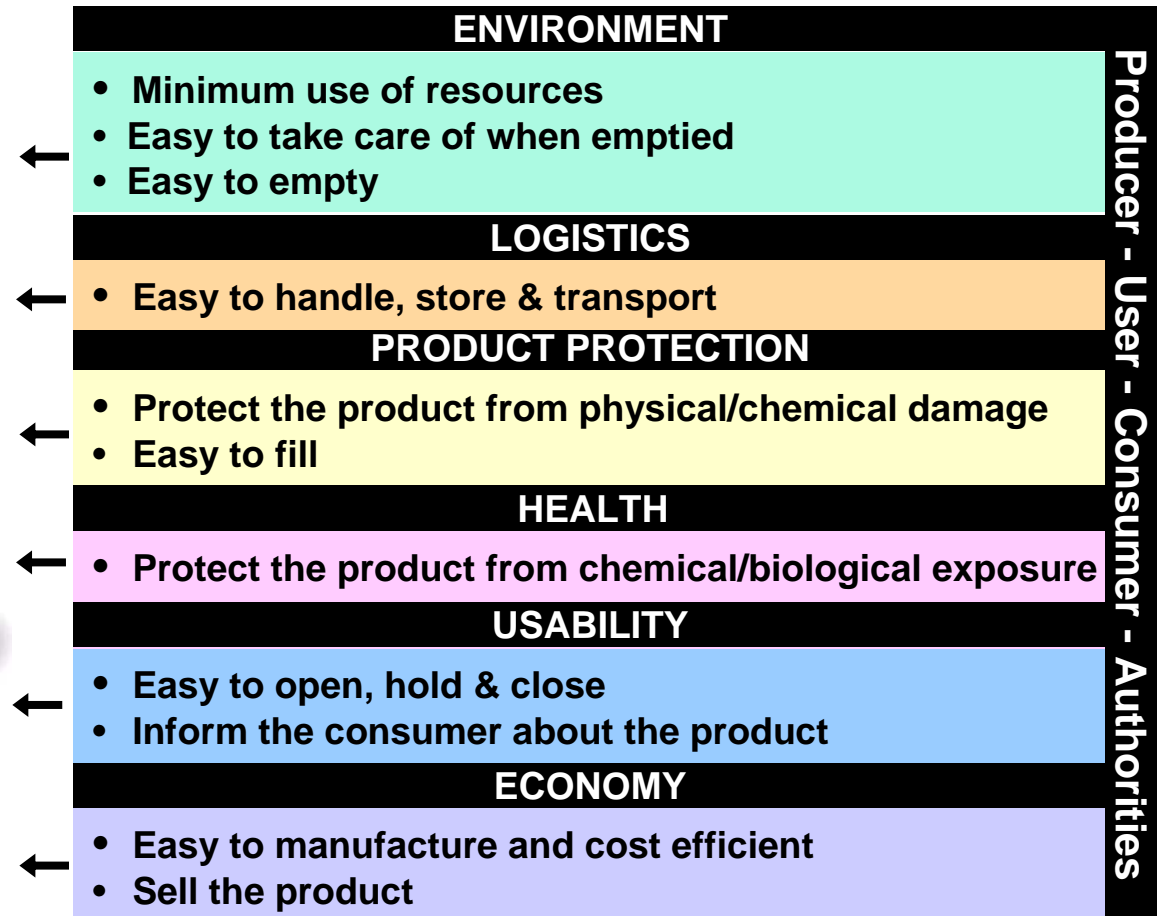
No	Product category	No	Product category	No	Product category
01	Alcoholic drinks excl. beer & wine	19	Cooking oil	37	Ready cooked meal (chilled)
02	Baby car products	20	Condoms & pregnancy tests	38	Ready cooked meal (dry)
03	Baby food	21	Diary products excl. cheese, milk & yoghurt	39	Ready cooked meal (frozen)
04	Baking products	22	Dental products	40	Sauces (dry)
05	Beer	23	Desserts	41	Sauces (wet)
06	Beverage excl. CSD	24	Egg	42	Snacks
07	Biscuit, crackers & crispbread	25	Fish & shellfish	43	Soft drinks
08	Body products	26	Fruit & berries	44	Soups
09	Bread	27	Hair products	45	Spices & stocks
10	Breakfast products	28	Health products	46	Sugar products
11	Butter & Margarine	29	Households products excl. laundry/cleaning agents	47	Pastries
12	Cheese (hard)	30	Ice cream	48	Tea
13	Cheese (soft)	31	Jam & Marmelade	49	Tobacco
14	Chewing gum & suger confectionary	32	Laundry products	50	Vegetables
15	Chicken & other poultry	33	Meat	51	Water
16	Chocolates	34	Milk	52	Wine
17	Cleaning agents	35	Pasta & Rice	53	Yoghurt
18	Coffee	36	Pet food	54	Other

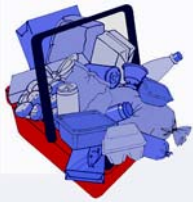


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# Packaging Key Values

*Major areas of packaging demands i.e*





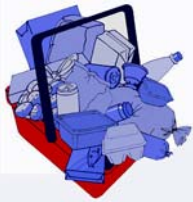
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# Packaging Key Values

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## Selection Filters

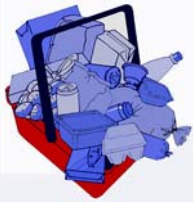
<b><i>General:</i></b>
Relevant
Keep simple (type and number)
Data readily available
Cost to collect data
Consideration of parameters identified in other studies
No duplication with other data / key values
Avoid need for special measurements
Agreement of participants
<b><i>Packaging key values:</i></b>
Commercial sensitivity
Already covered by legislation



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# Packaging Key Values

packaging demand area	No	Key value	Unit	Comment
Environment	1a-1d	Breakdown of package & product weight distribution on tertiary unit	Weight-%	Full tertiary package is studied. Weight distribution of product, primary, secondary and tertiary packaging are presented in a pie diagram.
	2a-2c	<u>Packaging weight</u> Product weight	g/kg	Primary, secondary and tertiary packaging studied, taking reuse into account where appropriate. Results presented in a staple diagram.
	3	<u>Packaging weight</u> Number of uses	g/use	Used as alternative to key value above and is specially for cases where packaging / product weight ratios may be misleading eg. concentration etc.
	4	Reusable packaging	Weight-%	Is calculated for the whole basket.
	5	Total basket weight	Tonnes	
Logistic	6a-6b	<u>Product volume</u> Packaging volume	Volume-%	Secondary and tertiary packaging studied. The Primary packaging is considered filled to maximum when hygiene and technical aspects are taken account for. Results presented in a staple diagram.
Usability	7	None at present		
Economy	8	None at present		

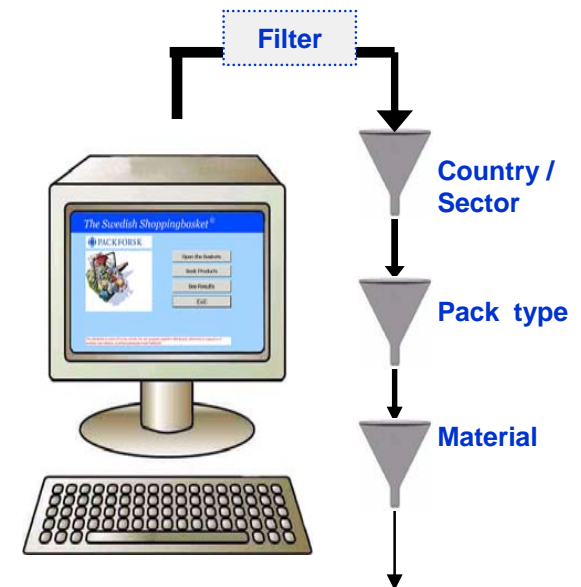


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# Packaging Key Values

All key values can be presented as an average for:

- All 5 countries
- A single country
- A specific packaging material  
Plastic, metal, corrugated board etc
- A specific packaging type  
Bag, bottle, carton, box, can etc
- A specific product category  
All 54 ESB product categories



**This different filters can also be combined with each other.**



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# Benchmarking - filler

## Example: yoghurt in a cup

No	ESB Key value	Packaging system	Unit	Key value Specified product	Average Key value			
					Basket	Packaging material (Plastic)	Packaging type (Cup)	Product category (Yoghurt)
1a	<u>Product weight</u> Tertiary unit weight	Product	Weight-%					
1b	<u>Packaging weight</u> Tertiary unit weight	Primary	Weight-%					
1c	<u>Packaging weight</u> Tertiary unit weight	Secondary	Weight-%					
1d	<u>Packaging weight</u> Tertiary unit weight	Tertiary	Weight-%					
2a	<u>Packaging weight</u> Product weight	Primary	g/kg					
2b	<u>Packaging weight</u> Product weight	Secondary	g/kg					
2c	<u>Packaging weight</u> Product weight	Tertiary	g/kg					
2d	<u>Packaging weight</u> Product weight	Whole	g/kg					
3	<u>Packaging weight</u> Number of uses	Primary	g/uses					
4a	<u>Product volume</u> Packaging volume	Secondary	Volume-%					
4b	<u>Product volume</u> Packaging volume	Tertiary	Volume-%					



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# Benchmarking - converter

**Example: Tray made of corrugated board**

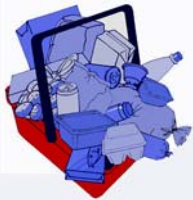
No	ESB Key value	Packaging type	Unit	Key value Specified product	Average Key value			
					Basket	Packaging material		
						Corr. board	Plastic	Cardboard
1a	<u>Secondary packaging weight</u> Tertiary unit weight	Tray	Weight-%					
2b	<u>Secondary packaging weight</u> Product weight	Tray	g/kg					
6b	<u>Product volume</u> Secondary packaging volume	Tray	Volume-%					

No	ESB Key value	Packaging type	Unit	Key value Specified product	Average Key value			
					Packaging material			
					Box	Display box	Container	Wraparound
1a	<u>Secondary packaging weight</u> Tertiary unit weight	Corr. board	Weight-%					
2b	<u>Secondary packaging weight</u> Product weight	Corr. board	g/kg					
6b	<u>Product volume</u> Secondary packaging volume	Corr. board	Volume-%					

ESB Key value	Unit	Basket	Packaging type			Product category		
		ESB	Tray	Box	Display box	Diary	Household	Hygiene
<u>Corr. board packaging weight</u> Total basket packaging weight	Weight-%							



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# Benchmarking eg. recovery org.

## Example: Fibre materials

ESB Key value	Unit	Basket
		ESB
<u>Primary packaging weight.</u> Total basket packaging weight	Weight-%	

ESB Key value	Unit	Basket	Packaging type			Product category		
		ESB	Carton	Box	Tray	Diary	Ready cooked meal	Household articles
<u>Cardboard - primary packaging weight.</u> Total basket packaging weight	Weight-%							
<u>Paper - primary packaging weight.</u> Total basket packaging weight	Weight-%							
<u>Corr. board - primary packaging weight.</u> Total basket packaging weight	Weight-%							
<u>Plastic - primary packaging weight.</u> Total basket packaging weight	Weight-%							

ESB Key value	Unit	Basket	Packaging type			Product category		
		ESB	Carton	Box	Tray	Diary	Ready cooked meal	Household articles
<u>Packaging (returnable) weight.</u> Total basket packaging weight	Weight-%							
<u>Packaging (special features) weight.</u> Total basket packaging weight	Weight-%							



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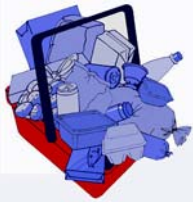
# Benchmarking eg. retailer

## Example: Fibre materials

ESB Key value	Unit	Basket	Packaging type			Product category		
		ESB	Bottle	Carton	Tray	Soft drinks	Diary	Beer
Average primary packaging height	mm							
Average primary packaging width	mm							

ESB Key value	Unit	Basket	Packaging type			Condition			
		ESB	Bottle	Carton	Tray	Canned	Frozen	Chilled	RT
<u>Primary packaging weight</u> Product weight	%								
<u>Secondary packaging weight</u> Product weight	%								

ESB Key value	Unit	Basket	Packaging type			Product category		
		ESB	Bottle	Box	Tray	Soft drinks	Diary	Beer
<u>Packaging (returnable) weight.</u> Total basket packaging weight	Weight-%							
<u>Packaging (special features) weight.</u> Total basket packaging weight	Weight-%							

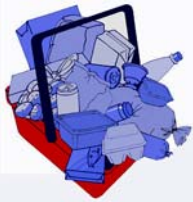


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# Social data

Social area	No	Social data	Unit	Possible link to packaging trends
Demographics	1	Number of inhabitants	-	Direct link with amount of packaging
	2	Inhabitants / km <sup>2</sup>	-	Link with need for robust packaging / need for pre-pared meals etc
	3	Young people in a country	%	Age will affect purchase patterns, need for trendy or time saving products etc. which may reflect in amount and type of packaging used.
	4	Middle aged people in a country	%	
	5	Old people in a country	%	
	6	Household size - average	-	Link to need for varying packaging size
	7	Household size - size split with time	%	Link to need for varying packaging size
	8	Distribution people living in city/country	%	Link with need for complex versus simple / more robust packaging.
Economy	9	Working population (male/female split)	-	Higher levels of employment will mean more affluence and hence higher consumption
	10	Number highly educated people	-	Higher income levels may reflect on packaging amount / complexity
	11	GDP (GNP) per capita	-	Direct link with amount packaging
	12	Number cars per 1000 inhabitants	-	Provide hint about shopping habits – out of town – versus local, this may reflect on packaging
Culture	13	Out of home consumption	%	May help to explain amount and type of products in basket
	14	Number products in different product categories	%	May help to explain use of range of packaging types
	15	Average meal preparation time	min	Monitor need for pre-packaged food

**Others will be added..**



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# Funding

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## **Funded through contributions from:**

- EUROOPEN
- STFI / Packforsk
- Individual EUROOPEN member companies
- Supporter Organisations

## **Additional funding from interested:**

- European and national institutions
- non-member companies

**will be welcomed**