TABLE 1. CLASSIFICATION OF TOP 25 CONSUMER MEGATRENDS BY THEIR IMPACT ON PACKAGING DEMAND

POSITIVE TRENDS	NEGATIVE TRENDS
• Aging population/growing number of senior citizens/ people living longer • Smaller household size • Increase in consumption 'on the go' • Higher share of single person households • Boomers defy retirement • Rise in obesity • Growing awareness of health and wellness issues • Growing number of asset rich / time poor consumers • Growing number of middle to high income people • Globalization • Growing ethnic diversity • Higher female participation rate in labor force • Higher share of single parent households • Desire to look and feel good	• Rising energy costs squeezes disposable income growth • Agro-inflation curbs demand for non-essential products • Public concern about excessive packaging • Slowdown in economic activity reduces income of low to middle-income families • Eco-awareness • Post-consumer waste recycling • Food provenance and authenticity • Internet retailing • Development of renewable energy resources • Product saturation • Concern about product safety and security

Source: Pira International Ltd

Consumer Packaging Megatrends in North America

The current economic crisis has thrown a fresh light on how major, underlying forces can have a significant impact on a range of industries, including packaging. Pira International, has conducted an exhaustive review of consumer megatrends and the likely impact on packaging over the next five years.

A megatrend is a large social, economic, political, environmental or technological change that is slow to form. Megatrends can have a big influence on governments and societies, possibly for decades. They are the underlying forces that drive trends. For example, some of the main factors that are driving packaging developments are social and cultural shifts, economic dynamics, demographic changes, technology developments and the political climate.

In late 2008, Pira published three studies looking at megatrends in North America, Europe and Asia. This article is based on some of the research from the Megatrends in North America study. The study identifies the key consumer trends that will have an important influence on the packaging industry in North America over the five years to 2013.

A comprehensive list of more than 100 consumer megatrends was grouped under five headings: demographic shifts, political conditions, science and technology, economic dynamics, social and cultural shifts. The list was compiled from a wide range of published information sources, including official sources such as census data, consumer research and consumer surveys.

This list was then presented to a panel of packaging experts, including brand owners, packaging converters and packaging consultants. The experts were asked to select the top 25 consumer megatrends for their impact on consumer packaging over the next five years. Using the feedback from this panel, Pira International identified and ranked the top 25 consumer trends. Each consumer trend selected by the panel was given a percentage based on the number of selections as a fraction of the number of respondents.

This full list of consumer trends was presented to a panel of packaging experts and they identified the top 25 (see Table 2). These are briefly outlined in rank order.

Table 1 contains roughly equal numbers of positive and negative trends. Positive trends are defined as those that will lead to growth in packaging use or will influence pack design. Negative trends will lead to a decline in demand for packaging and traditional packaging materials.

Factors connected with ageing populations rank highly among the positive trends. Demographic factors, including smaller household size and growing number of single-person households, are also rated important in shaping packaging developments. Health awareness, eating away from home and ethnic diversity are other key trends. Seven out of the top 10 trends can be classified as negative for the packaging industry. ■

Pira International is a leading publisher, conference organizer and research organization specializing in graphic arts, packaging, media and technology-led industries. Pira was established 75 years ago and is based near London, UK. It publishes over 40 off-the-shelf and multi-client reports annually, which are based on extensive research and provide customers with quantitative market forecasts and value-added analysis. For more information, please visit www.pira-international.com or call Neil Johnston on +44 (0) 1372 802 262, neil.johnston@pira-international.com

INDUSTRY INDICATORS

TABLE 2: TOP 25 CONSUMER MEGATRENDS BY THEIR IMPACT ON PACKAGING MATERIAL USAGE OVER THE NEXT FIVE YEARS

RANK	MEGATREND	IMPACT ON PACKAGING MATERIAL
1	Aging population / growing number of senior citizens / people living longer	Positive impact on demand for glass and plastic bottles, blister packaging, flexible plastic bags, stand-up pouches, microwavable plastic trays. Negative impact on demand for less convenient pack formats, such as metal food cans and drinks bottles with metal crown caps.
2	Public concern about excessive packaging	Growing demand for biodegradable bags and sacks, film, trays & containers and bottles, recyclable packaging. Continued trend for lightweight packaging and reduction in excessive paper & board or flexible plastic secondary packaging. Growing demand for in-store recycling facilities.
3	Smaller household size	Higher demand for smaller glass / plastic trays, pots and bottles.
4	Slowdown in economic activity reduces income of low to middle-income families	Slower sales growth for non-essential products, such as luxury chocolates, wine & spirits, cosmetics, toiletries, consumer durables. Impacting on sales of all material types, including glass bottles, paper & cardboard boxes, rigid plastic bottles.
5	Eco-awareness	Positive impact on demand for sustainable materials such as biopolymers, paper & board packaging. Negative impact on demand for mixed plastics and multi-material packaging
6	Rising energy costs squeeze disposable income growth	Growing emphasis on use of materials which use less energy in production and transport, such as flexible plastics, paper & board and folding cartons. Less use of high energy use materials, such as glass.
7	Agro-inflation curbs consumer demand for non-essential products	Rising food costs are persuading some manufacturers to reduce portion size or switch to cheaper packaging, such as flexible plastics and paper.
8	Post-consumer waste recycling	Positive impact on demand for easy to recycle materials, such as glass bottles, PET bottles, metal drinks cans. Negative impact demand for mixed plastic films.
9	Increase in consumption 'on the go'	Out of home consumption leading to higher use of metal and plastic bulk food containers for restaurants. Growth in portable packaging such as resealable plastic bottles and resealabe food trays and bags.
10	Food provenance and authenticity	More informative food and drink labelling about product sourcing and ingredients for all pack material types.
11	Internet retailing	Positive impact on demand for cardboard boxes and other secondary packaging materials such as polystyrene and flexible plastics.
12	Rise in obesity	Rising demand for sealed lidded trays, barrier films and PET bottles. Possible reduction in pack sizes with development of calorie control packs.
13	Concern about product safety and security	Growing use of tamper-evident plastic closures for food, drink and medical & pharmaceutical products.
14	Development of renewable energy resources	Slower demand for non-essential packaged food and drink products.
15	Product saturation	Further development of innovative packaging with value-added features, such as reclosable stand-up pouches and microwavable packaging, particularly benefiting rigid and flexible plastics.
16	Higher share of single person households	Downsizing will impact upon all types of packaging materials.
17	Boomers defy retirement	Growing demand for convenience packaging including plastic stand-up pouches, ovenable or microwavable rigid plastic packaging, barrier films and speciality closures (trigger sprayers, dispensing closures, etc). Glass bottles benefit from higher sales of products such as wine & spirits and cosmetics & toiletries.
18	Growing awareness of health and wellness issues	Positive impact on demand for all pack materials used for health food packaging. Negative impact on demand for less healthy food & drink including PET soft drinks bottles and rigid and flexible plastic trays and bags for confectionery and pastries.
19	Growing consumer choice from globalization	Greater standardization of packaging formats and materials used across global markets.
20	Growing number of asset rich/time poor consumers	Growing demand for products such as microwavable plastic containers, resealable stand-up pouches, easy open metal cans and flexible barrier plastic film.
21	Growing ethnic diversity	Rising sales of exotic ready meals leading to growing demand for CPET or aluminium containers and trays
22	Higher share of single parent households	Positive impact on demand for rigid plastic trays, flexible plastic bags and pouches, paper & board boxes.
23	Growing number of middle to high income people	Higher demand for premium products favors glass bottles and jars for cosmetics & toiletries and alcoholic beverages. Wood or board boxes for secondary packaging of premium alcoholic drinks, such as champagne and whisky.
24	Higher female participation rate in labor force	Positive impact in demand for flexible plastics film, stand-up pouches with resealable features, easy opening metal cans and microwavable CPET trays for ready meals.
25	Desire to look and feel good	Favors rigid plastic bottles and jars and glass bottles.

Source: Pira International Ltd