

Meeting of the Retail & Ecommerce Workstream

21 March 2023





Antitrust Policy Statement

- Not exclude competitors from membership
- Restrict members from dealing with non-members
- Limit access to information developed by the Association
- Enforce membership rules arbitrarily
- Prohibit discussion on pricing including:
 - Current or future prices (a)
 - What constitutes a "fair" profit level
 - Possible increases or decreases in prices (c)
 - Standardization or stabilization of prices (d)
 - Pricing procedures (e)
 - Cash discounts
 - Credit terms
 - (h) Control of sales
 - Allocation of markets or customers
 - Complaints to a competitor that his prices constitute unfair trade practices;
 - (k) Refusal to deal with a corporation because of its pricing or distribution practices
 - Whether or not the pricing practices of any industry members are unethical or constitute an unfair practice



FOR MEETINGS OF MEMBERS AND DIRECTORS

Members and Directors of the Reusable Packaging Association ("RPA") will avoid actions and discussions at meetings of the Members and/or at meetings of the Board of Directors that constitute potential violations of the antitrust laws. The following is a list of actions and discussion topics that will be avoided by all Members and Directors:

- Members and Directors will not exclude competitors from membership in the Association, without substantial lawful justification, and not if there is a business advantage in being a member.
- Members and Directors will not restrict members from dealing with normembers.
- Members and Directors will not limit access to information developed by the Association, unless such information is firmly grounded upon the need to protect trade
- Members and Directors will not enforce membership rules arbitrarily.
- Members and Directors of RPA will avoid discussion of matters of potential antitrust concern at meetings, including:
 - (a) Current or future prices
 - (b) What constitutes a "fair" profit level;
 - (c) Possible increases or decreases in prices.
 - (d) Standardization or stabilization of prices;
 - (e) Pricing procedures;
 - (f) Cash discounts: (x) Credit terms:
 - (h) Control of sales:

 - (i) Allocation of markets or customers;
 - Complaints to a competitor that his prices constitute unfair trade practices;
 - (k) Refusal to deal with a corporation because of its pricing or distribution practices;
 - (1) Whether or not the pricing practices of any industry members are unethical or constitute an unfair trade practice



R&E Meeting Agenda

I. RPA Updates

- A. Retail & eCommerce Chairperson
- B. Changing Policy Conditions Impacting Retail Packaging
- C. Learning Center Panel at Pack Expo Las Vegas

II. Industry Items

- A. Forum on Retail Market Trends
- B. Positioning Reuse Systems during Economic Sensitive Times

III. Project Working Session: "HOW" of Reuse White Paper

- A. Status Update & Timeline
- B. Working session on remaining content



Retail & eCommerce Workstream

New R&E Workstream Chair





Nate Klinger
Director of Marketing & Communications





Retail & eCommerce Workstream

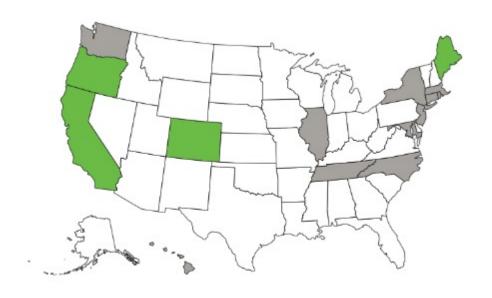
Public Policy Developments



Example

Article 26 Re-use and refill targets

 From 1 January 2030, economic operators making large household appliances listed in point 2 of Annex II to Directive 2012/19/EU available on the market for the first time within the territory of a Member State shall ensure that 90 % of those products are made available in reusable transport packaging within a system for re-use.



States have introduced legislation on EPR for packaging in 2022

EPR for packaging bills have passed in the U.S.

Source: Sustainable Packaging Coalition



Reusable Packaging Learning Center 2023



September 11–13, 2023 Las Vegas Convention Center Las Vegas, Nevada USA





Opportunity for a R&E-Hosted Industry Panel Discussion



Excellence in Reusable Packaging Awards 2023

Application period open until May 1, 2023



September 11–13, 2023 Las Vegas Convention Center Las Vegas, Nevada USA



Reusable Systems
Design Innovation
Product Technology
Categories







Industry Forum



MONTHLY ECONOMIC REVIEW

Monthly Economic Review: February 2023

Sluggish growth expected in 2023

"A month into 2023, the outlook for the economy is facing stiff headwinds and – with the exception of easing inflation – will likely face more challenges before it gets better."



02.02.2023

The 8 biggest trends for the retail industry

- 1. Retailers are expanding where they sell.
- 2. Retailers are planning for economic uncertainty.
- 3. Automation can enhace customer experience.
- 4. Customers want to engage with brands.
- 5. Social and mobile commerce are two of the biggest digital trends in the retail industry and they're booming.
- 6. Experiential retail experiences are rapidly evolving.
- 7. The borders between retail and other industries continue to blur.
- 8. Flexible payment options are becoming increasingly important to younger consumers especially Gen Z.



Industry Forum

Deloitte.

Perspective

2023 retail industry outlook

Embrace the changing consumer to bolster growth in inflationary times

"Retailers should consider creating more profitable last-mile delivery solutions by investing in automated micro-fulfillment centers (MFCs)."

Three retail industry trends and priorities

The confluence of obstacles retailers face can make the next steps daunting. As such, we believe there are three key areas that retailers can—and should—address now to create efficiencies while addressing the changing consumer: last-mile capabilities, reverse logistics, and social commerce.



Supply chain

Last-mile capabilities

Seven in 10 leaders say they are very confident that they will be able to deliver a seamless experience to consumers across channels, compared with only two of 10 laggards. To do so, retailers should consider creating more profitable last-mile delivery solutions by investing in automated micro-fulfillment centers (MFCs). MFCs can increase storage capacity and throughput rates-filling orders for multiple stores—and create efficiencies by freeing up employees who otherwise would be picking orders. MFCs are particularly attractive given they can expand the range of same-day and nextday services retailers can potentially reach.2



Omnichannel

Reverse logistics

Every return is an opportunity for retailers to save a sale. Retailers should look to take advantage of in-store reverse logistics capabilities. In-person returns satisfy customers' desire for immediate credit while reducing expenses for mailed return delivery. And with the growing popularity of return bars—stores that pack and ship returns for partnering retailers—there is an opportunity to drive additional store traffic and expand the footprint of their client base, an ideal situation during inflationary times. Recent data suggests that retailers participating in return bars save over 20% in processing costs.³



Digital

Social commerce

The cost of acquiring a new customer can be up to six to seven times more than retaining old customers, and social commerce can help reinforce existing customer loyalty. Retailers should invest in technologies to provide a seamless purchasing experience within social channels and shoppable media to nudge users toward purchases and create loyalty. Enabling shoppable tags with product information, embedding the brand website into the social media app, and enabling inapp transactions can help reduce friction on the shopping journey.



"How" of Reuse Whitepaper Scope

As Retailers and eCommerce companies are increasingly considering reusable platforms for their supply chains to eliminate single-use packaging, there is a need to educate the retail industry on what "key considerations" and "learnings" to enable the "**HOW**" of reuse. This paper will include:

- 1. Defining <u>successful reusable applications</u> and what key business model variables should be considered in evaluating a reuse-based investment.
- 2. <u>Best practices & learnings</u> from global retailers when applying B2B reusable-based systems, and what learnings can be leveraged for B2C (refill, etc.) applications.
- 3. What <u>sustainability framework</u> and variables should be considered when evaluating a reuse-based investments and resulting sustainability impact.

Global case studies and reusable examples will be included throughout this white paper from RPA Retail & eCommerce workstream member companies and their customers if possible. After reading this paper, retailers and their manufacturing & supply chain partners should have the tools, references, and resources to decide on "HOW" to use, implement or make investment decisions into reusable-based systems.



"How" of Reuse Whitepaper

Status & Inputs Received

Whitepaper Sections	Owners	Content	Draft Edit	Final Edit	Final
1. Executive Summary	RPA Debus/Hoff	Υ	Now		
2. Introduction	RPA Debus	Υ	Now		
3. Why Reusable systems	RPA / R&E SME	Υ	Now		
4. What is a successful reusable application	IFCO, CHEP, TBD	Partial			
5. What best practices & learnings	SA, Rehrig, IFCO, TBD	Partial			
6. What sustainability framework and variables	Rehrig, Monoflow, TBD	Partial			
7. How to use the reuse data	RPA / TWG Content, TBD	TWG			
8. Appendix	RPA Hoff	Υ	Now		

To Todd ProMat 3/6th 3/21st

TBDJune/July



"How" of Reuse Whitepaper

Content & Editing

Primary	Content
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All

- Member company members provide primary content.
- Do not focus on grammar, more important to have the right details.
- Review content with your internal marketing resources, as required.
 Companies will get a final copy of whitepaper for review & approval.

Secondary Content

RPA

- RPA will provide secondary content as required from past papers,
 industry reports and other Working Groups (Technology Working Group)
- RPA will engage, as required editing resources

Content Process

All / RPA

When smaller working teams finish a section, email to <u>thoff@reusables.org</u>