



Retail & Ecommerce Workstream Meeting

February 8, 2024

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:
 - (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
 - (g) Credit terms
 - (h) Control of sales
 - (i) Allocation of markets or customers
 - (j) 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
 - (l) Whether or not the pricing practices of any industry members are unethical or constitute an unfair practice



ANTITRUST COMPLIANCE POLICY STATEMENT 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:

1. 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.
2. Members and Directors will not restrict members from dealing with nonmembers.
3. 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 secrets.
4. Members and Directors will not enforce membership rules arbitrarily.
5. 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;
 - (g) Credit terms;
 - (h) Control of sales;
 - (i) Allocation of markets or customers;
 - (j) 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; and
 - (l) Whether or not the pricing practices of any industry members are unethical or constitute an unfair trade practice.

Meeting Agenda

I. RPA Updates

- Pack Expo 2024
- 2023 Excellence in Reusable Packaging Award

II. Project Updates / Topics

- Retail BLOG “How of Reuse”
- USDA Foreign Agricultural Services Grant
- Alliance for Sustainable Packaging of Food
- Large Household Appliance Reusable Packaging

III. Industry Trends and Developments

- Retail Reuse & QSR B2B Reuse Industry Initiatives

PACK EXPO 2024 Overview

- **Pack Expo 2024**

- November 3 – 6, 2024; Chicago, IL
- RPA = Entire Lakeside Upper Hall Ballroom

- **Reusable Packaging Learning Center**

- Retail & Ecommerce session planning starting
- Session topics?
 - How of Reuse?
 - LHA appliance project?
 - Other reuse projects underway?



Industry Panel: Reusable Transport Packaging in Retail Supply Chains: Business Case and Best Practices



2024 Excellence in Reusable Packaging Award

- **Excellence in Reusable Packaging Award**

- Application period will open later in February.
- Watch for announcement in RPA website, member newsletters, or on social media.
- <https://www.reusables.org/events-trade-shows/awards-and-recognition/>



Project: R&E “How of Reuse” INNER LOOP™

What makes a good reusable transport packaging application?

Development of educational BLOG content from R&E Whitepaper

- **Simple** <1000 words. Simplistic visual.
- Key Message: Reuse works in Retail & Ecommerce, but MORE opportunities exist
- Content / Topics: 1) What makes a good reusable application?
- Call To Action: Link to R&E Whitepaper / RPA Marketplace
- Awareness: SEO keywords, Social
- Podcast: Reuse on Replay interview.
ACTION: Scheduled with Rehrig, additional R&E interest?
- Future: Industry webinar, Other whitepaper topics



Project: USDA Foreign Agricultural Services Grant

Overview

- IFPA-UF-RPA Application Filed May 2023
 - ☐ Passed sufficiency review from USDA. Jan. '24 Done
 - ☐ Moving to scope/budget negotiation phase Now
 - ☐ Anticipated Funding Selection & Award Date: TBD / Summer



- Meeting EU Packaging requirements for a Circular Economy for US Food Exports
- Evaluation of Reusable Transport Packaging Performance, Logistics, Costs, and Environmental & Social Impacts.
- Study will include three Key Agricultural Specialty Crops for U.S. Exports
 - Berries, Tree nuts and Citrus



Project: Alliance for Sustainable Food Packaging

RPA Retail Workstream Engagement

- Retail & Ecommerce is the primary RPA channel.
- Launched publicly on Jan. 15th with global media coverage & multiple interviews.
- Working Groups – Government, Comms, Technical
- Topics Underway
 - EU PPWR position feedback & EU lobbying on use of sustainable packaging, including reusable transport packaging
 - Future Canada produce packaging requirements



Project: Large Household Appliance & Reuse

Large Household Appliance (LHA) Project

- Retail & Ecommerce workstream project
 - Searious Business project leader
 - [Lia Huybrechts](#)
- Unique opportunity for the global RPA industry
 - Regulatory driven from EU PPWR proposals
50% of transport reuse by 2030; 90% by 2040
 - High damage rates experienced & similar value chains
 - Relatively low number of OEMs, some global.
- RPA Board of Directors approved seed funding
 - \$25K for Phase 1 (2024).
 - Desire for a multiple step Phase 1 approach



Reusable Transport Packaging for Large Household Appliances

Relevance to your company

- **Comply** with European legislation (PPWR) targets: 50% of transport packaging for Large Household Appliances in reuse systems by 2030, 90% by 2040.
- **Reduce** product damage significantly (compared to current 5-8%). Achieve **cost savings** and customer satisfaction.
- **Avoid** single-use packaging waste & reduce up to 77% of CO2 emissions.
- **Increase** warehouse efficiency.
- **Capitalize** innovative business models.

Our offered solution

We provide the setting-up and coordination of a **pooling system** for reusable transport packaging for LHA. We will enable reuse through:

- shared investment in standardized packaging and reverse logistics
- value-chain alignment and stakeholder collaboration
- joint tracking & monitoring system to coordinate
- communication and continuous growth of consortium

Set-up



- Pooling partner manages logistics
- Brands and retailers pay per use or a monthly fee
- A closed loop is achieved through material recycling & re-application
- Cost-efficiency for all stakeholders involved

We turn your circular plastics efforts into a success!
seriousbusiness.com



RPA R&E Feedback Needed

Project: Large Household Appliance & Reuse

Large Household Appliance (LHA) Project – Phase 1A DRAFT SUMMARY

- **Scope** *“Opportunity”*

- Define LHA Market and Regulatory Scope

Goal: Formalize market and regulatory understanding by RPA/members

- Product
- Packaging
- Geography
- Status of PPR rulemaking

- Define Supply Chain Characteristics / Business model/ Business case

Goal: What is the scale/magnitude of the problem to be solved?

- Supply chain characteristics (primarily EU, US secondarily)
- Define business case and profit prospects of main stakeholders across the value chain



Project: Large Household Appliance & Reuse

Large Household Appliance (LHA) Project – Phase 1A DRAFT SUMMARY

- **Output** *"Deliverables"*
 - External | LHA industry presentation (pitch deck)
 - Engage with industry targets to validate (2-3) or LHA trade association for feedback.
RPA member companies to assist with LHA contacts.
 - Document feedback into a formal report & recommendation to RPA.
 - Internal | RPA presentation / concise report (approx. ~10 pages)
 - Shared with RPA Board, RPA member companies the value
 - RPA members share with their leadership when considering funding next phases

Project: Large Household Appliance & Reuse

Large Household Appliance (LHA) Project – Phase 1A DRAFT SUMMARY

- **Success** *“What does winning look like?”*
 - Compelling “data” that a large appliance OEM/trade association is willing to engage with Phase 1B
 - Compelling “data” that an RPA member company is willing to fund the next phases (2, 3)
- ‘ Need to produce a solid “business case” with “compelling data” for project advancements, so it is worth the investment by RPA members & OEM(s). ’

Project: Large Household Appliance & Reuse

Large Household Appliance (LHA) Project – **Phase 1B DRAFT SUMMARY**

- **Phase 1B | Business Modeling** (Approval after Phase 1A review)
 - Initial scoping or 2-3 scenarios with a high-over analysis.
 - Includes a feasibility study, packaging format, reverse logistics incl. maintenance, partnerships, digital infrastructure set-up, etc.) + Selection of the most promising scenario.
 - Set system requirements, parameters, and Key Performance Indicators. (KPIs)

Project: Large Household Appliance & Reuse

Large Household Appliance (LHA) Project – Phase 2 DRAFT SUMMARY

- **Phase 2: Business model development**
 - Comprehensive *in-depth economic analysis* (CBA) and *environmental analysis* (LCA)
 - Definition of *optimal business model set-up* (ownership, collaboration agreements, financing strategy, reuse scheme, packaging journey, etc.)
 - Selection of *suitable packaging options* (specs of product, system & behavioural change)
 - Creation of *strategic roadmap* for long-term sustained competitive advantage
 - Guidelines for *stakeholder engagement plan, marketing strategy and communications*

Project: Large Household Appliance & Reuse

Large Household Appliance (LHA) Project – Phase 2 DRAFT SUMMARY

- **Phase 3: Piloting and evaluation**
 - Execution of a *6-month retail pilot, testing different settings*
 - Implementation of *marketing & communications campaign*
 - Evaluation of pilot and *provision of improvement actions* needed for *upscaling*

Industry Trends & Developments

- **Industry Trends / News**

- Retail Reuse Harmonization Initiative (US Plastics Pact, ...)
- B2B Reuse Transition in QSRs (RRAF)

Industry Trends & Developments

Retail Reuse Harmonization Initiative

Partnership between U.S. Plastics Pact, Ocean Plastics Leadership Network (OPLN), UPSTREAM

- Focused on brands & retailer engagement
- Scope includes both returnables & refill. Both benefit from reusable supply chain packaging & infrastructure.
- "work on design, collection & washing infrastructure, ..."
- R&E committee interest & thoughts?



Retail Reuse Harmonization Initiative

- Partnership between U.S. Plastics Pact, OPLN, and UPSTREAM
- Pre-competitive, cross-sector approach to progress from research and discussion to strategic reuse implementation—returnables or refill
- Multi-year project with targeted focus on categories with highest potential for consumer acceptance
- Open to all brands and retailers who want to work together to further reuse
- Participating brands and retailers will work on packaging design, collection and washing infrastructure, and consumer messaging harmonization
- Interested in learning more? Please fill out an [interest form here](#)

Industry Trends & Developments

B2B Reuse Transition in QSRs

RRAF Food/Beverage Working Group Initiatives

- Focused on QSR (Quick Serve Restaurants)
- QSR Supplier transitions to reuse/refill model
“Cleaning products, ingredient delivery, etc.”
- Close alignment with RPA member company customer / potential customers.

- R&E committee interest & thoughts?

RRAF FOOD/BEVERAGE WORKING GROUP INITIATIVES:
B2B Reuse Transition in QSRs



Food service providers collaborate with suppliers to transition select restaurant back-of-house business operations (i.e., cleaning products, ingredient delivery, etc.) to a reuse/refill model.

“Yum! Brands discussed company’s support and fundraising goal of \$250,000.”



Additional Topics

Other

- RPA Marketing
 - RPA - Do you / your team / your company follow RPA on LinkedIn?
 - Great LinkedIn content for RPA followers. ~4200 followers
- RPA committees – Member company podcast Interviews
 - Introduce your company & reuse solution.
 - How does your reuse solution positively impact the industry?
 - Why you belong to the RPA & participate in RPA committees?

