



Retail & Ecommerce Workstream Meeting

March 14, 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 / PackExpo East
- 2024 Excellence in Reusable Packaging Award
- Sustainability Working Group (SWG)

II. Project Updates / Topics

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

III. Industry Trends and Developments

- Modex
- EU PPWR (Packaging & Packaging Waste Regulations)

PACK EXPO 2024 Overview

- **Pack Expo 2024**

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



- **Reusable Packaging Learning Center Panel**

- Retail & Ecommerce group panel
- Moderator + 4 panelists
- Proposed session topics include:
 - How of Reuse?
 - LHA appliance project & findings
 - Other ideas

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**

- Call for entries announced Feb 28th
- Application period is OPEN.
- **Submission deadline May 15, 2024.**
- Download Application Form from RPA Website.

- <https://www.reusables.org/events-trade-shows/awards-and-recognition/>



1. Reusable Packaging System
2. Design Innovation
3. Product Technology

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. (Rehrig)
- Future: Industry webinar, Other whitepaper topics
- Release: LinkedIn & Podcast recording in April 2023



Project: USDA Foreign Agricultural Services Grant

Overview

- IFPA-UF-RPA Application Filed
 - ❑ Passed sufficiency review from USDA. Jan. '24
 - ❑ Moving to scope/budget clarification phase
 - ❑ Anticipated Funding Selection & Award Date:

May 2023

Done

RPA Submitted March 1st

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: Large Household Appliance & Reuse

Large Household Appliance (LHA) Project

- Overview
 - Retail & Ecommerce workstream project
 - Searious Business project leader ([Lia Huybrechts](#))
- Opportunity for RPA members
 - Regulatory driven from EU PPWR proposed 40% of transport reuse by 2030; 70% by 2040
 - High damage rates experienced & similar value chains
 - Few key global LHA players, EU (focus) & US
- Seed Funding Provided by RPA Board of Directors
 - \$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

RECYCLE

- Pick Manufacturer
- Recycle

REUSE

- Brand/retailer
- Digital Infrastructure
- End-user
- Pooling partner (Inspect, Clean & Store)

- 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 Incorporated / Needed

Proposed March Kickoff

Project: Large Household Appliance & Reuse

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

- **Scope** *“Opportunity”*

- Define LHA Market and Regulatory Scope

- Goal: Formalize market and regulatory understanding by RPA members

- Product
 - Packaging
 - Geography
 - Status of PPWR 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 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 & opportunity.
 - RPA members share with their leadership when considering funding next phases

Project: Large Household Appliance & Reuse

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

- **Success** *“What does winning look like?”*
 - Compelling “story” that a large appliance OEM/trade association is willing to engage with Phase 1B
 - Compelling “story” 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 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: Alliance for Sustainable Food Packaging

RPA Retail Workstream Engagement

- Retail & Ecommerce is the primary RPA channel.
- Working Groups – Government, Comms, Technical
- Topics Underway
 - EU PPWR position feedback & EU lobbying on use of sustainable packaging, including reusable transport packaging. (next trend slides)
- Next Topics
 - Future Canada produce packaging requirements



Industry Trends & Developments

- **Industry Trends / News**

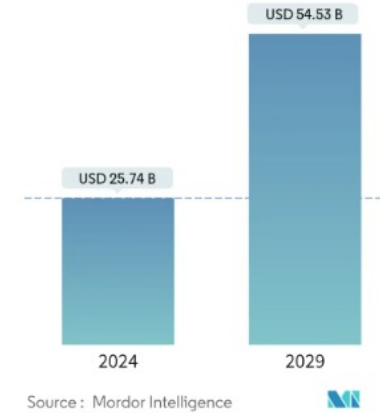
- MODEX & Automation
- EU PPWR (Packaging & Packaging Waste Regulations) Update

Industry Trends & Developments

- **MODEX**

- Warehouse & Supply Chain automation is continuing to rapidly grow in 2024 +
- Automation requires repeatable, consistent packaging to work optimally.
- The use of tags & data play a CRITICAL part in automation & efficiency goals.
- Walmart seeking suppliers to adopt RFID on all products, starting with select categories.
- Other experiences?

Warehouse Automation Market
Market Size in USD Billion
CAGR 16.20%



Industry Trends & Developments

- **EU PPWR (Packaging & Packaging Waste Regulations) Update**

- RPA positions being shared through the ASPF / Hogan Lovells
- Upcoming Key Dates (as of March 5th)
 - 11th March: ENVI Committee debate on PPWR | 25th March: Environmental Council
 - 22nd April: indicative PPWR Plenary Vote (last Plenary 22-25th April)
- **Article 26(1):** Reuse targets for transportation packaging is being discussed; the Belgian Presidency compromise draft agreement proposes **at least 40% as of January 2030** and **70% as of January 2040** → subject to ongoing discussions.
- **Article 7(4):** Belgian Presidency compromise draft agreement proposes to exempt plastic packaging coming into contact with food from minimum recycled content requirements → subject to ongoing discussions.



Additional Topics

Other

– RPA Marketing

- RPA - Do you / your team / your company follow RPA on LinkedIn?

- Great LinkedIn content for RPA followers.

- ~ 4280 followers | March 2024

- 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?

