



Unlocking your business potential

www.ledgarconsulting.co.uk



Introducing our Horizon Scan service

What is our Horizon Scan service?

Horizon Scan is an in-depth review into the markets you operate in, your competitors and the products and services your competing with.

Horizon scan starts with detailed, primary research which develops into key business considerations and actionable outputs which will shape your business strategy, drive commercial excellence and enhance shareholder assurance and value.

Our Horizon Scans can be completed for any business, sector or product/service line.

Why you need it

- This key commercial activity often doesn't feature in business plans or BAU activities. However, having delivered many Horizon Scans for our clients we've seen how it unlocks new strategic direction and delivers significant commercial returns
- Our customers have secured ROI's between 10:1 and 50:1 based on our Horizon Scans
- Our work will mean you will know in great detail who your competitors are, what their published strategic plans are and what this may mean for your strategy
- Our work will highlight key market themes/trends and innovations enabling you to consider new strategies and commercial opportunities
- Our work will ensure you are fully aware of the latest news and legislation relevant to your market and how this may impact your business
- Our work brings together numerous insights and data points which will be translated into a strategic response and commercial opportunity plan
- Horizon Scan will enable you to get ahead of your competitors and the market
- Horizon Scan has been a great investment for our customers. We'd love your company to benefit too.

How to get started

- Contact either Jenny Ledger jenny@ledgerconsulting.co.uk or Rob Wainwright rob@ledgerconsulting.co.uk
- We'll meet you to understand more about your business, your market and what you'd like to achieve
- Once we've agreed the brief we'll begin your Horizon Scan and start the journey to delivering new commercial benefits



Unlocking your business potential

Horizon Scan example report

Food sector supply chain analysis and commercial response

2023

Produced by JLC Ltd



Food market themes

Key themes in the food sector

Key theme for food sector 1 Example

A public consultation on the revision of EU food contact materials (13th Jan 2023) coordinated by the consortium of the EU Horizon project R3PACK. As a result of the project, the European Commission is reportedly considering new policy options. They suggested that;

- Implementation of consumer reuse options at scale, quickest method of reducing plastic pollution
- EU legislation should uplift safe and sustainable packaging solutions.
- EU legislation must be developed to incentivise the use of alternative sustainable food packaging, especially fibre-based solutions

Key theme for food sector 2

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Key theme for food sector 3

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Key theme for food sector 4

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Key theme for food sector 5

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Key theme for food sector 6

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Key theme for food sector 7

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Key theme for food sector 8

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Potential strategic and sales opportunities

Potential strategic/sales opp 1 Example

Active and Intelligent Packaging Industry Association - Aiming to accelerate uptake of smart packaging innovation across FMCG at every stage of supply chains and retail. Many of your competitors as well as convertors are end brands are members. Membership is free.

Potential strategic/sales opp 2

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Potential strategic/sales opp 4

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Potential strategic/sales opp 5

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Potential strategic/sales opp 6

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Potential strategic/sales opp 7

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Potential strategic/sales opp 8

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Potential strategic/sales opp 9

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Food sector news

Latest news – European Union proposed legislation changes

BACKGROUND

- What are they?
- What do they mean for the industry?
- Where do they fit into the overall approach?

TIMINGS

- Date for –xyz
- Date for hjk
- Date for sdc

KEY TAKEAWAYS

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WHAT DOES THIS MEAN FOR YOU

- What does your company need to know?
- What does your company need to do?
- What to keep an eye on
- Where to find further resources and updates

RISKS & OPPORTUNITIES

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Paper-based packaging



While we will not be seeing fibre-based packaging entirely replacing plastics anytime soon – or at all – we can expect a continuation of big and small brands alike migrating to paper solutions for certain applications. From what people in the know have told me, I think we may be seeing some particularly exciting technical advances in the confectionery and snacking sector over the next year. (A number of big players as Nestlé, Mars Wrigley and Ritter Sport have of course already introduced their own paper-based lines.)

We'll almost certainly hear more from the paper bottles space – Paboco's solution, which has been trialled by companies including Carlsberg, Coca-Cola and Absolut, is a notable example. This year we anticipate the roll-out of the next generation prototype of this bottle which will also feature a paper closure from Blue Ocean Closures.

But there are other innovators in this space: Pulpex and Stora Enso's paper bottle solution is moving further towards full commercialization for 2023 with a partnership with Kraft Heinz on a potential paper-based ketchup bottle.

The development of more efficient – and more easily recyclable – barrier solutions for paper packaging are also ongoing and the coming year will no doubt see more examples in the field. Dispersion coatings to replace polymer-based coated board for paper barriers are an interesting area to keep an eye on, with companies such as Walki and Kemira leading the way.

Improved barrier solutions for paper packaging are also of course in continuous development. For instance, several companies – Kotkamills, DSM and Kemira among them – are experimenting with dispersion coatings to replace polymer-based coated board for paper barriers.

Coveris announces new solution to recover and recycle waste on-site, producing recyclate for customers

2 DECEMBER 2022

Coveris has launched ReCover, a new business segment seeking to facilitate the sourcing, processing, and recycling of waste at Coveris sites to close its own loop and provide high-quality recyclates to third-party customers.

In line with the company's aims to reduce waste, ReCover is hoped to expand the company's recycling capacity and capabilities, thus decreasing pollution. It is also expected to support Coveris' customers with the resources to pursue their sustainability goals.

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Key observations/ learnings

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Just Eat extends partnership with CLUBZERØ reuse system

18 NOVEMBER 2022

Following a successful 10-month pilot, Just Eat is scaling its partnership with CLUBZERØ to provide a returnable packaging system for corporate offices.

Designed to provide a zero-waste experience through a convenient packaging return scheme, the expansion will see over 80 restaurants and cafes in London and surrounding areas provided with reusable takeaway cups and containers.

Business customers will have a choice to opt-in for CLUBZERØ reusable packaging when placing an order with Just Eat for Business from a range of participating restaurants or cafes through the Just Eat for Business platform. After the food has been eaten, the packaging will be collected by CLUBZERØ to be washed centrally and redistributed for reuse.

Mondi and FRESH!PACKING announce recyclable kraft paper cooler bag for consumers to transport cold food

16 DECEMBER 2022

Mondi has collaborated with FRESH!PACKING to design a certified recyclable, reusable kraft paper cooler bag for the protection and transportation of chilled and frozen goods from a point of purchase to a consumer's home – reportedly improving its cooling protection by up to 2.5 times.

Compatible with existing European waste paper streams, the Fresh!Bag's kraft paper outer layer hopes to replace the multi-material packaging of traditional designs and increase their recyclability. The bag's cooling element is made of pulp encased inside the kraft paper, and its handle loops within itself to form an open seal for extra security and convenience.

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AIPIA Congress Highlight: Temperature label combines RFID/NFC with visual indicator

13 DECEMBER 2022



One of the new products on show at the AIPIA World Congress was Cleantech's Digital Temperature Indicator (DTI), an irreversible temperature label with visual and digital indication, integrated with a passive RFID or NFC transponder.

Cleantech and Beyond Ltd, a startup based in Thailand, is a deep-tech university spin-off specializing in advanced materials. It has developed the DTI, to enable temperature-tracking at item level and presents the status in both visual and wireless digital formats without any need for a battery. When an item is exposed to temperatures above a threshold point during transportation or storage, the status of the indicator irreversibly changes (both visually and digitally).

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Amcor signs agreement with ExxonMobil for five-year supply of recycled polyethylene

12 DECEMBER 2022

Amcor has announced a five-year deal with ExxonMobil to purchase an increasing supply of chemically recycled certified circular polyethylene in a bid to reach its goal of 30% recycled material across its portfolio by 2030.

The amount of PE supplied to Amcor through ExxonMobil's advanced recycling technology is set to rise yearly, with an annual volume of 100,000 tons expected to have been reached by the end of the five-year period. Amcor intends to apply the material across its global portfolio, and to the healthcare and food industries in particular.

Mondi provides Krissia surimi sticks with new recyclable, paper-based design

8 DECEMBER 2022

Mondi has provided Angulas Aguinaga with recyclable, paper-based secondary packaging for its Krissia brand chilled surimi sticks in the hopes of reducing its plastic content and increasing its recyclability.

Replacing the previous multi-material plastic solution, the new packaging is made of Mondri's **FunctionalBarrier Paper**, a flexible packaging solution thought to resist water vapour and moisture. It is said to be manufactured using responsibly sourced, renewable, and certified materials, and claims to feature a tear-resistant kraft base paper to ensure that the packaging is fully sealable and protects the product within.

Notpla launches seaweed-coated packs with grease and water-resistant properties

1 DECEMBER 2022

Notpla has launched a new range of grease and water-resistant packaging formats – with a plastic-free barrier made from seaweed. The solutions can either be recycled or home composted at end-of-life.

ARTICLE 4

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Key observations/learnings

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26.05.22

Coveris launch recyclable, reduced plastic cheese packs for Iceland

Coveris have launched a range of recyclable, reduced plastic pouches for Iceland's grated cheese, supporting the retailer's commitment to become the UK's first plastic neutral supermarket.

Mondi provides Krissia surimi sticks with new recyclable, paper-based design

8 DECEMBER 2022

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Replacing the previous multi-material plastic solution, the new packaging is made of Mondi's **FunctionalBarrier Paper**, a flexible packaging solution thought to resist water vapour and moisture. It is said to be manufactured using responsibly sourced, renewable, and certified materials, and claims to feature a tear-resistant kraft base paper to ensure that the packaging is fully sealable and protects the product within.

Stora Enso's pilot plant for a breakthrough bioplastic is well underway. What will happen next?

The launch of a new bioplastics pilot plant in the Flanders region in Belgium will enable a new bioplastics production technology, ready for implementation at industrial scale
Nov 3, 2022



Customer stories - 12.12.2022
Crumbl Cookies relies on Metsä Board's innovative packaging solutions

Key observations/learnings

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DECEMBER 2, 2022

WestRock Acquisition of Grupo Gondi Complete

WestRock today announced it has completed the acquisition of the remaining interest in Grupo Gondi for \$970 million plus the assumption of debt.

[Read more](#)

STORY

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**Food sector supply
chain and
competitor scan**

Summary of supply chain businesses – Board manufacturers

Business	Board producer	Convertor	Custom print	Board material	Product offering	Key strategies	Manufacturing	Good practice for you to consider replicating
Competitor A	y/n	y/n	y/n	<p>xm T board capacity production (only y% of this in Europe)</p> <p>They use x% of produced materials in their own conversion businesses</p> <p>z% of sold on</p>	<p>Board xx different materials associated with Food sector manufacturing</p> <p>Converted products</p> <ul style="list-style-type: none"> Product 1 Product 2 Product 3 Product 4 Product 5 Product 6 Product 7 Product 8 	<ul style="list-style-type: none"> x% of revenues are food and beverage. They estimate a CAGR rate of y% Vision - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed Future direction – Vivamus a tefllus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Sales channel strategy - xyz x% of the USD \$bn are consumer packaging (x% of this is foodservice). y% of consumer packaging sales are European. Targeting >\$x billion EBITDA (>x%) Large network of convert & distribution capabilities Meeting customer demand for sustainable e-commerce solutions through automation and fiber-based recyclable solutions. x% growth forc/st to Z% x% portfolio of recyclable, compostable or reusable packaging by 2025 abc and xyz are their highest margin board products 	<ul style="list-style-type: none"> UK x Folding Carton sites; y Specialty printing x mills, x substrates – No mills in Europe x% used in their own conversion, y% sold 	<ul style="list-style-type: none"> Vivamus a tefllus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Nunc viverra imperdiet enim. Fusce est. Vivamus a tefllus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra nonummy pede. Mauris et orci Nunc viverra imperdiet enim. Fusce est. Vivamus a tefllus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra nonummy pede. Mauris et orci
Competitor B	y/n	y/n	y/n	<p>Total consumer board production is xm T</p> <p>Main European site for FSB is abc Finland.</p>	<p>Board xx different materials associated with Food sector manufacturing</p> <p>Converted products</p> <p>Product 1 Product 2 Product 3 Product 4 Product 5 Product 6 Product 7 Product 8</p>	<ul style="list-style-type: none"> Sell to; convertors, brand owners & retailers Strong convertor collaboration producing White papers with the like of abc Lead circular packaging xyz packaging is their key growth strategy Targeting x% sales growth 2021 v 2030 Help customers replace fossil based materials and reduce CO2 Value chain collaboration to drive sustainability Key focus food & drinks market – no x in Europe for FoodS board More end conversion by them; corrugated board and cartonboard Large expansion of converted formed fiber products €xbn investment in xyz to increase consumer board production 2030 v 2021; >x% sales increase, EBIT 2x, fully integrated board capacity with internal pulp Increasing their packaging materials division (€xbn x% of group) >€xbn Full adoption circular guidelines by 2025 x% recyclable products 2030 	<ul style="list-style-type: none"> X board mills (x in Europe) z packaging units (z in Europe) Main European site for FSB is abc Finland. They produce xm T per year (total board) xm pieces year of formed fiber produced in xyz Sweden 	<p>Vivamus a tefllus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Nunc viverra imperdiet enim. Fusce est.</p> <p>Vivamus a tefllus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra nonummy pede. Mauris et orci</p> <p>Nunc viverra imperdiet enim. Fusce est.</p> <p>Vivamus a tefllus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra nonummy pede. Mauris et orci</p>
Competitor C	y/n	y/n	y/n	abc	def	ghi	<ul style="list-style-type: none"> jkl 	mno
Competitor D	y/n	y/n	y/n	abc	def	ghi	<ul style="list-style-type: none"> jkl 	mno

Summary of supply chain businesses – Convertors

Business	Board producer	Convertor	Custom print	Board Provider	Product offering	Key strategies	Manufacturing	Good practice for you to consider replicating
Convertor 1	y/n	y/n	y/n	Company a	Press Board / Ovenable Board trays Square trays x designs Rectangular trays x designs Round trays x designs Other shape e.g. Multi compartment trays, oval trays x designs Supply heat sealing machines	<ul style="list-style-type: none"> Vision - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed Future direction – Vivamus a tefllus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Play on British manufactured as a USP 21/22 turnover up x% to £xm UK turnover £xm, Europe £x, Other £x Profit b4 tax increased to £xk (£xk '20) EBITDA x% Strategy to increase range of products and services x employees down x from year before x stock lines, hold x registered designs, patents and trademarks, in excess of xk designs in their database 	<ul style="list-style-type: none"> X manufacturing sites 	<ul style="list-style-type: none"> Vivamus a tefllus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Nunc viverra imperdiet enim. Fusce est. Vivamus a tefllus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra nonummy pede. Mauris et orci Nunc viverra imperdiet enim. Fusce est. Vivamus a tefllus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra nonummy pede. Mauris
Convertor 2	y/n	y/n	y/n	Not disclosed	UK manufactured products <ul style="list-style-type: none"> Product 1 Product 2 Product 3 Product 4 Not produced outside the UK <ul style="list-style-type: none"> Product 1 Product 2 Product 3 Product 4 	<ul style="list-style-type: none"> xm Euro annual sales across Europe across three divisions – films, flexibles and paper Existing markets; Food, pet food, industrial, medical, agricultural, home and personal care Growth plans in existing & diversified markets. Establishing a stand-alone Business Unit entirely dedicated to circular economy and closing the loop. abc is a platform for all mechanical recycling activities. Purchased existing tech in abc with xT capacity Invested over £xm to expand its xyz manufacturing capabilities. Bought two MPS flexographic wide web presses & made further site infrastructure improvements (abc site). Growing abc business with £xm transformation investment across two production sites last 2 year. Growth through acquisition. March 2021 acquired abc producer xyz Packaging. Supports our growth strategy in high performance xyz 2020 invested around £xm to double the footprint of the xyz Labels 	X sites UK = x France y, Germany z, Austria x, Hungary y, Middle East z	<ul style="list-style-type: none"> Vivamus a tefllus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Nunc viverra imperdiet enim. Fusce est. Vivamus a tefllus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra nonummy pede. Mauris et orci Nunc viverra imperdiet enim. Fusce est. Vivamus a tefllus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra nonummy pede. Mauris
Convertor 3	y/n	y/n	y/n	Company b	abc	<ul style="list-style-type: none"> def 	<ul style="list-style-type: none"> ghi 	<ul style="list-style-type: none"> jkl
Convertor 4	y/n	y/n	y/n	Not disclosed	abc	<ul style="list-style-type: none"> def 	<ul style="list-style-type: none"> ghi 	<ul style="list-style-type: none"> Jkl
Convertor 5	y/n	y/n	y/n	Company b	abc	<ul style="list-style-type: none"> def 	<ul style="list-style-type: none"> ghi 	<ul style="list-style-type: none"> jkl
Convertor 6	y/n	y/n	y/n	Not disclosed	abc	<ul style="list-style-type: none"> def 	<ul style="list-style-type: none"> ghi 	<ul style="list-style-type: none"> Jkl

Competitor 1 – Strategy, products & sales map

Single slide produced for each competitor

Board provider

Who supplies them

Strategy & innovation

- x% of revenues are food and beverage. They estimate a CAGR rate of y%
- Vision - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed
- Future direction – Vivamus a tefllus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas.
- Sales channel strategy - xyz
- x% of the USD \$bn are consumer packaging (x% of this is foodservice). y% of consumer packaging sales are European.
- Targeting >\$x billion EBITDA (>x%)
- Large network of convert & distribution capabilities
- Meeting customer demand for sustainable e-commerce solutions through automation and fiber-based recyclable solutions. x% growth forc/st to Z%
- x% portfolio of recyclable, compostable or reusable packaging by 2025
- abc and xyz are their highest margin board products

Manufacturing

X sites – Capacity x
UK = x
France y,
Germany z,

Board products, food products, converted products, added value products

Board
xx different materials associated with Food sector manufacturing

Converted products
Product 1
Product 2
Product 3
Product 4
Product 5
Product 6
Product 7
Product 8

Structure, markets, sales channels, margins

Channel to market

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OPPORTUNITIES ACROSS HIGH-GROWTH INDUSTRIES
WELL-POSITIONED TO SOLVE CUSTOMER PROBLEMS WITH DIFFERENTIATED SOLUTIONS

	FOOD	BEVERAGE	HEALTHCARE	E-COMMERCE	FOODSERVICE
% OF TOTAL FY21 SALES*	31%	12%	7%	6%	2%
CAGR 2021-2025	3%	3%	5%	13%	4%
PRODUCTS COMMERCIALIZED TO SERVE INDUSTRIES					



**Market trends
identified by
competitors**

Any competitors identifying key market drivers and trends competitor 1

TREND 1 Example

The next billion consumers will come from emerging markets

- Growing globally, the middle class is expected to increase by 1.8 billion people in the next 10 years
- Coming from China, India, South East Asia and longer-term Africa
- Demanding safe access to affordable food every day, enabled by packaging
- Driving the need for local scale and cost competitiveness

TREND 2

- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed

TREND 3

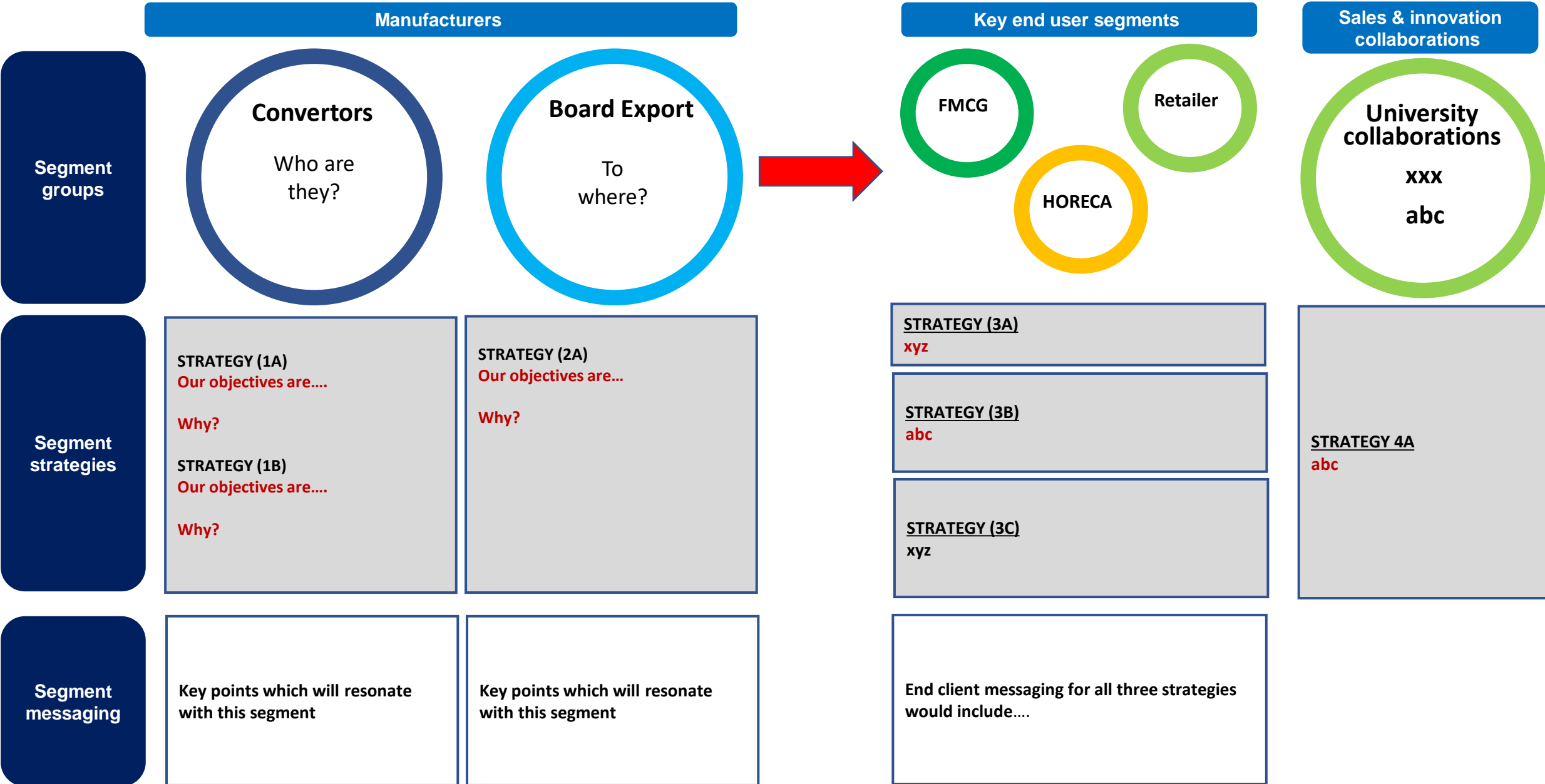
- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed

TREND 4

- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed

**Strategic response
and sales
opportunities**

Sales segmentation strategy food – key sectors based on high value growth end use sectors



Ideas for sales objectives and food strategy strands

Strategies	Strategy strand	Benefit	Strategy area
<p>Convertors</p>	<p>STRAND 1 - Lorem ipsum dolor sit amet, consectetur adipiscing elit.</p>	<p>Compete</p>	<p>Sales and marketing strategies</p>
<p>STRATEGY (1A) STRATEGY TITLE</p>	<p>STRAND 2 - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna</p>	<p>New bus ££</p>	
<p>STRATEGY (1B) STRATEGY TITLE</p>	<p>STRAND 3 - Lorem ipsum dolor sit amet, consectetur adipiscing elit.</p>	<p>New bus ££</p>	
<p>Board Export</p> <p>STRATEGY (2A) STRATEGY TITLE</p>	<p>STRAND 4 - Lorem ipsum dolor sit amet, consectetur adipiscing elit.</p>	<p>New bus ££</p>	
<p>FMCG & Retailers</p> <p>STRATEGY (3A) STRATEGY TITLE</p>	<p>STRAND 5 - Lorem ipsum dolor sit amet, consectetur adipiscing elit.</p>	<p>New bus £££</p>	
<p>STRATEGY (3B) STRATEGY TITLE</p>	<p>STRAND 6 - Lorem ipsum dolor sit amet, consectetur adipiscing elit.</p>	<p>Compete</p>	<p>R&D strategy</p>
<p>STRATEGY (3C) STRATEGY TITLE</p>	<p>STRAND 7 - Lorem ipsum dolor sit amet, consectetur adipiscing elit.</p>	<p>New bus £££</p>	<p>Capability enhancements</p>
<p>Sales & innovation</p>	<p>STRAND 8 - Lorem ipsum dolor sit amet, consectetur adipiscing elit.</p>	<p>Compete</p>	
<p>STRATEGY 4A STRATEGY TITLE</p>	<p>STRAND 3 - Lorem ipsum dolor sit amet, consectetur adipiscing elit.</p>	<p>New bus £</p>	
	<p>STRAND 4 - Lorem ipsum dolor sit amet, consectetur adipiscing elit.</p>	<p>Compete</p>	
	<p>STRAND 5 - Lorem ipsum dolor sit amet, consectetur adipiscing elit.</p>	<p>Compete</p>	
	<p>STRAND 6 - Lorem ipsum dolor sit amet, consectetur adipiscing elit.</p>	<p>New bus ££</p>	<p>Partnerships</p>
	<p>STRAND 7 - Lorem ipsum dolor sit amet, consectetur adipiscing elit.</p>	<p>Compete</p>	
	<p>STRAND 8 - Lorem ipsum dolor sit amet, consectetur adipiscing elit.</p>	<p>Compete</p>	
	<p>STRAND 8 - Lorem ipsum dolor sit amet, consectetur adipiscing elit.</p>	<p>New bus ££</p>	
	<p>STRAND 6 - Lorem ipsum dolor sit amet, consectetur adipiscing elit.</p>	<p>Compete</p>	

Sales and marketing strategies - high level project plan

Strategy strands	Sales and marketing strategy									
	Q1	Q2	Q3	Q4						
STRAND 1	<ol style="list-style-type: none"> Identify xyz Define abc 	Use our identified to guide a go to market of xxx								
STRAND 2	<ol style="list-style-type: none"> Agree xyz Map abc 	Inform all other strategy strands according to xyz								
STRAND 3	<ol style="list-style-type: none"> Develop abc Develop xyz 	abc identified								
STRAND 4		Refine & develop xyz								
STRAND 5	Identify xyzl required	Develop abc for xyz	Produce and deploy	Test & learn/measure effectiveness						
				Refine & develop from learnings						
	Identify abc sales opps	Decide on xyz opps	Produce abc	<table border="1"> <tr> <td>Event 1</td> <td>Event 2</td> <td>Event 3</td> </tr> <tr> <td>Measure eff'ness</td> <td>Measure eff'ness</td> <td>Measure eff'ness</td> </tr> </table>	Event 1	Event 2	Event 3	Measure eff'ness	Measure eff'ness	Measure eff'ness
	Event 1	Event 2	Event 3							
	Measure eff'ness	Measure eff'ness	Measure eff'ness							
	Establish abc needs		abc brief created	Go live – xyz	Promote new xyz					
		Analyse google analytics	Source abc	Measure effectiveness/review & refine						
abc developed		Identify deployment	Go live	Measure effectiveness/review and refine						
STRAND 6	Appetite to progress? Who? What?	Establish partners, agree abc	Produce, publish and promote							
STRAND 7	Investigate strategy and business case metrics of abc	Decision YES/NO	Establish sales/delivery process and xyz	Sell						

Capability enhancement strategies - high level project plan

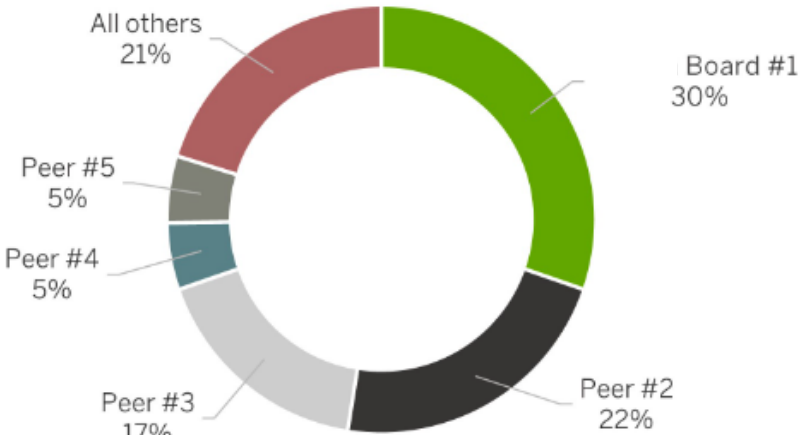
Strategy strands	Capability enhancement strategy							
	Q1		Q2		Q3		Q4	
STRAND 8	Consider or discount	List of targets and why	Draft business case; commercial benefits	Sales and marketing plan	Transaction			Integration
					Sales pipeline developed			
STRAND 9	Operationally feasible? Commercially beneficial?	Consider or discount	Who would be of interest	Relationships development	What materials would be of interest	Operational scoping		Marketing planning
STRAND 10	Consider or discount	Identify desired xyz relationships	Articulate the strategy and abc	Build the relationships	Develop joint strategies, KPI's and commercial objectives to be realised	Go live	Evaluate; commercial sales success, market insight gathering and abc	
STRAND 11	Horizon scan		Share impacts	Horizon scan	Shar impacts	Horizon scan	Share impacts	Horizon scan Share impacts
STRAND 12	Consider or discount	Identify all abc options	Evaluate & decide best options	Develop cust comms plans	Develop the relationships			Review and promote successes Review for additional options
					Promote within the sales and marketing plans			
STRAND 13	Consider or discount	Draft business case; commercial benefits	Sales and marketing plan	Operational implementation			Go live	
				Sales pipeline developed				
STRAND 14	Consider or discount	Draft business case; commercial benefits & what product	Sales and marketing plan	Operational implementation			Go live	
				Sales pipeline developed				

**Deep dive into
competitors and supply
chain business's**

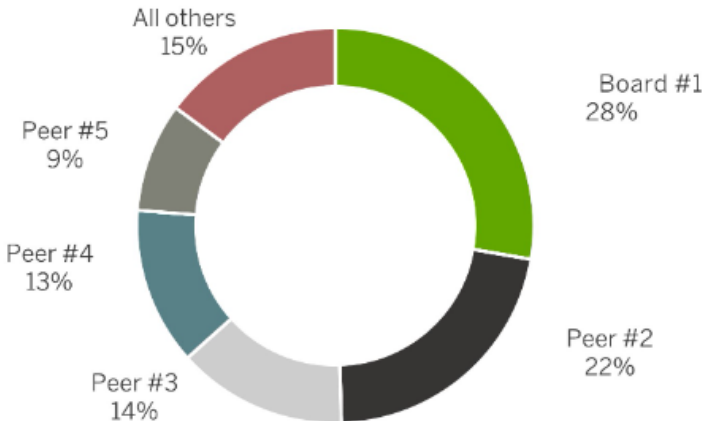
COMPETITOR A

Competitor A – Board production capacity and demand comparisons

Folding boxboard capacity in Europe



White kraftliner capacity in Europe



	AMERICAS	EMEA	APAC
Share of total deliveries	27%	67%	6%
Focus	Continued growth in North America	Maintaining strong market position in Europe	Focus on high quality packaging in selected end use segments
Demand outlook for folding boxboard and white kraftliners	<ul style="list-style-type: none"> Limited local availability of lightweight high-quality folding boxboards and coated white kraftliners Demand growth for recyclable and/or compostable food and food service packaging made from renewable raw materials Growth of demand for retailready packaging in stores Promotion and differentiation of brands in growing e-commerce 	<ul style="list-style-type: none"> Environmental awareness and regulation support the demand for recyclable packaging materials Food safety requirements favour pure fresh fibre paperboards Growth of demand for retailready packaging in stores Growth of e-commerce Weakened availability and higher price of recycled fibre 	<ul style="list-style-type: none"> Growth of the middle class increases consumers' purchasing power and demand for packaged products China's import ban on recycled fibres increases demand for pulp and fresh fibre paperboards Growth of local paperboard capacity boosts supply in China

Competitor A – Market metrics and strategic direction

Key metrics for competitor A Board division

- Production capacity at the abc mill is xK T Folding BB and xkT WKL
- In process of increasing FBB capacity by xk T p.a start H2 2023 €xm investment
- x% of FBB goes to US & x% Europe

2.1

billion euros
Sales in 2021

2.0

million tonnes
Annual paperboard capacity

8

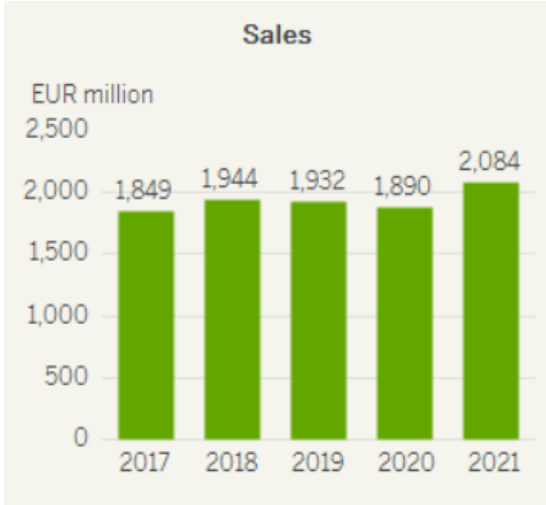
Production units

2,400

Personnel at year end

Our strategy highlights solutions that promote the circular economy

We are a leading European producer of premium fresh fibre paperboards and a forerunner in sustainability. Our decision making is guided by our profitability and sustainability targets and the ambition to increase shareholder value. Our goal is to maintain a strong financial position and distribute a competitive dividend to our owners.



Near-term outlook

October–December 2022

- Paperboard delivery volumes are expected to remain stable or slightly decrease due to seasonal slowdown
- Average sales prices of paperboards are expected to increase slightly
- Strengthening US dollar improves profitability
- Demand for softwood market pulp is expected to remain stable. Several factors limit supply
- Cost inflation continues to be rapid in energy and chemicals, maintenance costs will increase from Q3
- Slowdown in global economic growth and weakening consumer purchasing power increase uncertainty and may negatively impact profitability

Strategy

Our strategy is to grow in fibre-based packaging materials and renew our industrial operations.

We implement our strategy through five strategic programmes that drive sustainable growth in fibre-based packaging materials and industrial efficiency.



Premium supplier



Effective innovation



Safe and efficient operations and organic growth



Leader in sustainability



Motivated people

Competitor A – Food product groups

Folding boxboards



Folding boxboards



Folding boxboards



Folding boxboards



Folding boxboards

[DOWNLOAD](#) ⬇

THICKNESS: 350 - 650 µm
GRAMMAGE: 200 - 340 g/m²

Fully coated folding boxboard, hard sized, GC2

[DOWNLOAD](#) ⬇

THICKNESS: 310 - 610 µm
GRAMMAGE: 195 - 345 g/m²

Fully coated folding boxboard, hard sized, OBA free

[DOWNLOAD](#) ⬇

THICKNESS: 310 - 610 µm
GRAMMAGE: 175 - 325 g/m²

Folding boxboard, uncoated, hard sized, OBA free

[DOWNLOAD](#) ⬇

THICKNESS: 260 - 610 µm
GRAMMAGE: 180 - 350 g/m²

Fully coated bleached paperboard with white reverse side

Barrier boards



Barrier boards

[DOWNLOAD](#) ⬇

THICKNESS: 310 - 610 µm
GRAMMAGE: 175 - 325 g/m²

Folding boxboard, uncoated, hard sized, OBA free, PE coating reverse side (matt)



Barrier boards

[DOWNLOAD](#) ⬇

THICKNESS: 310 - 610 µm
GRAMMAGE: 175 - 325 g/m²

Folding boxboard, uncoated, hard sized, OBA free, PE coating top (glossy) and reverse side (matt)



Barrier boards

[DOWNLOAD](#) ⬇

THICKNESS: 310 - 610 µm
GRAMMAGE: 175 - 325 g/m²

Folding boxboard, uncoated, hard sized, OBA free, PE coating top (glossy) and reverse side (matt)



Barrier boards

[DOWNLOAD](#) ⬇

THICKNESS: 260 - 610 µm
GRAMMAGE: 180 - 350 g/m²

Fully coated bleached paperboard with white reverse side, hard sized, PE coating reverse side (matt)

8 results View:



Barrier boards

[DOWNLOAD](#) ⬇

THICKNESS: 310 - 610 µm
GRAMMAGE: 195 - 345 g/m²

Fully coated folding boxboard, hard sized, OBA free, PE coating reverse side (matt)

White kraftliners



White kraftliners



White kraftliners



White kraftliners



White kraftliners

[DOWNLOAD](#) ⬇

THICKNESS: 140 - 185 µm
GRAMMAGE: 135 - 175 g/m²

Coated white top kraftliner

[DOWNLOAD](#) ⬇

THICKNESS: 90 - 205 µm
GRAMMAGE: 70 - 160 g/m²

Fully bleached uncoated white kraftliner, also as fluting

[DOWNLOAD](#) ⬇

THICKNESS: 120 - 250 µm
GRAMMAGE: 125 - 250 g/m²

Double-coated white top kraftliner

[DOWNLOAD](#) ⬇

THICKNESS: 130 - 205 µm
GRAMMAGE: 130 - 200 g/m²

Double-coated white top kraftliner

Competitor A – food product specs - Barrier

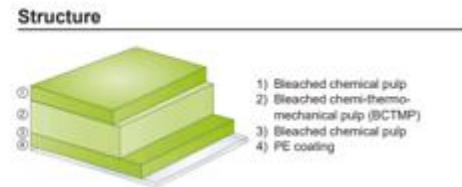
Product 1

Product description
 Folding boxboard, uncoated, hard sized, OBA free, PE coating reverse side (matt)

End use
 Frozen food, Chilled food, Trays, Plates

Features

Printing method	Offset, Flexo
Food contact	Suitable for food contact*
Metsä Board mill	Husum



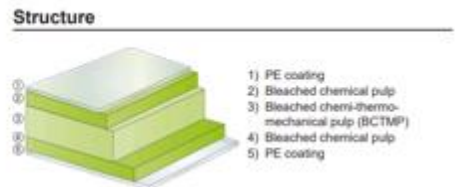
Product 2

Product description
 Folding boxboard, uncoated, hard sized, OBA free, PE coating top (glossy) and reverse side (matt)

End use
 Frozen food, Chilled food, Plates, Trays

Features

Printing method	Offset, Flexo
Food contact	Suitable for food contact*
Metsä Board mill	Husum



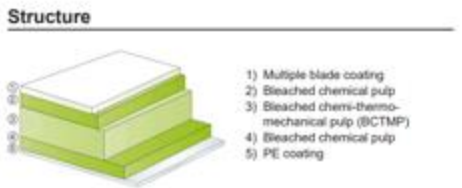
Product 3

Product description
 Fully coated bleached paperboard with white reverse side, hard sized, PE coating reverse side (matt)

End use
 Chocolate and confectionery, Frozen food, Food service

Features

Printing method	Offset, Digital, Gravure, Flexo
Food contact	Suitable for food contact*
Metsä Board mill	Husum



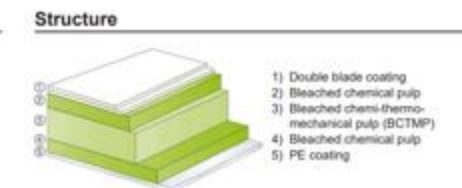
Product 4

Product description
 Fully coated folding boxboard, hard sized, OBA free, PE coating reverse side (matt)

End use
 Frozen food, Chilled food, Trays, Plates

Features

Printing method	Flexo, Offset, Digital
Food contact	Suitable for food contact*
Metsä Board mill	Husum



Competitor A – food product specs - FBB

Product 1

Product description

Fully coated folding boxboard, hard sized, GC2

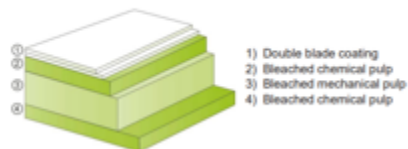
End use

Foods, Beverages, Frozen food, Healthcare, General packaging, Retail-ready packaging

Features

Printing method Offset, Flexo, Digital
Food contact EU Regulation (EC) No 1935/2004, USFDA21CFR§176.170*, USFDA21CFR§176.180*
Metsä Board mill Simpele

Structure



Product 2

Product description

Folding boxboard, uncoated, hard sized, OBA free

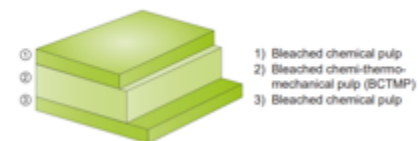
End use

Beautycare, Healthcare, Foods, Beverages, Frozen food, Chilled food, Trays, Plates, Folded trays, Fast food applications, Food service

Features

Printing method Offset, Flexo
Food contact EU Regulation (EC) No 1935/2004, GB9685, GB4806.8, USFDA21CFR§176.170*, USFDA21CFR§176.180*
Metsä Board mill Husum

Structure



Product 3

Product description

Fully coated paperboard with dispersion barrier coating providing medium grease and moisture resistance, hard sized, OBA-free, free from fluorinated chemicals

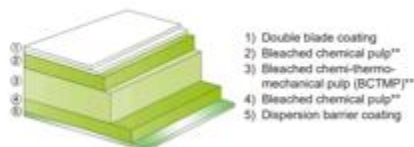
End use

Fresh food, Packages for selected food service, Dry food

Features

Printing method Offset, Flexo, Digital
Food contact EU Regulation (EC) No 1935/2004, USFDA21CFR§176.170*, USFDA21CFR§176.180*, GB4806.8, GB9685
Metsä Board mill Kyro

Structure



Product 4

Product description

Fully coated bleached paperboard with coated reverse side

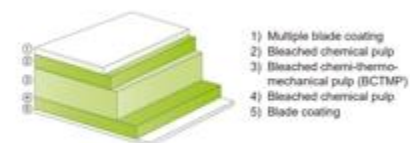
End use

Covers, Cards, Graphic applications, Point-of-sales materials, Beautycare, Healthcare, Consumer electronics, Chocolate and confectionery

Features

Printing method Offset, Gravure, Flexo, Digital
Food contact EU Regulation (EC) No 1935/2004, USFDA21CFR§176.170*, USFDA21CFR§176.180*
Metsä Board mill Kyro

Structure



Product 5

Product description

Fully coated folding boxboard, hard sized, OBA free

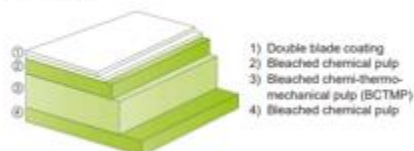
End use

Foods, Beverages, Healthcare, Frozen food, Chilled food, Plates, Trays, Folded trays, Fast food applications, Food service, General packaging

Features

Printing method Flexo, Offset, Digital
Food contact EU Regulation (EC) No 1935/2004, GB4806.8, GB9685, USFDA21CFR§176.170*, USFDA21CFR§176.180*
Metsä Board mill Husum

Structure



Product 6

Product description

Fully coated bleached paperboard with white reverse side

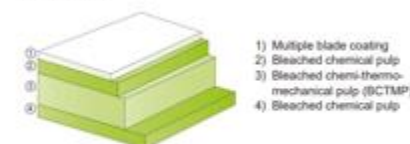
End use

Chocolate and confectionery, Foods, Healthcare, Graphic applications, Beautycare, Consumer electronics, Covers, Cards, Beverages, Point-of-sales materials

Features

Printing method Offset, Digital, Gravure, Flexo
Food contact EU Regulation (EC) No 1935/2004, USFDA21CFR§176.170*, USFDA21CFR§176.180*
Metsä Board mill Äänekoski, Husum

Structure



Competitor A – food product specs - WKL

Product 1

Product description

Coated white top kraftliner

End use

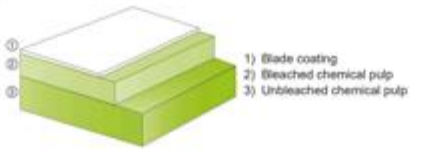
Retail-ready packaging, Foods, Beverages, Consumer electronics, Consumer durables, General packaging

Features

Printing method Flexo postprint, Digital inkjet
EU Regulation (EC)
Food contact No 1935/2004, USFDA21CFR§176.170*, USFDA21CFR§176.180*

Metsä Board mill Kemi

Structure



Product 2

Product description

Fully bleached uncoated white kraftliner, also as fluting

End use

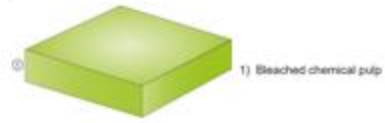
Retail-ready packaging, Shelf-ready packaging, Point-of-sales materials, Foods, Fast food applications, Beverages, Bags, Beautycare, Consumer electronics, Consumer durables, General packaging

Features

Printing method Flexo, Offset, Digital inkjet
Food contact EU Regulation (EC)
No 1935/2004, USFDA21CFR§176.170*, USFDA21CFR§176.180*

Metsä Board mill Husum

Structure



Product 3

Product description

Double-coated white top kraftliner

End use

Retail-ready packaging, Shelf-ready packaging, Point-of-sales materials, Foods, Beverages, Consumer electronics, Consumer durables

Features

Printing method Flexo preprint, Flexo postprint, Offset, Digital inkjet
EU Regulation (EC)
Food contact No 1935/2004, USFDA21CFR§176.170*, USFDA21CFR§176.180*

Metsä Board mill Kemi

Structure



Product 4

Product description

Double-coated white top kraftliner

End use

Retail-ready packaging, Shelf-ready packaging, Point-of-sales materials, Foods, Beverages, Consumer electronics, Consumer durables

Features

Printing method Flexo postprint, Digital inkjet
Food contact EU Regulation (EC)
No 1935/2004, USFDA21CFR§176.170*, USFDA21CFR§176.180*

Metsä Board mill Kemi

Structure



News according to their website

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Observation

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Review of Competitor A's marketing activities and quality

PRODUCT SEARCHES

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WEBSITE REVIEW

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PR ACTIVITY

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MARKETING RESOURCES

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SALES ACTIVITY

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NEWS & PUBLICATIONS

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OTHER

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Opportunity & learnings

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