

Packaging Sustainability

The importance of introducing more PCR and Partnerships
Marketing a better planet: the power of a grey bottle

Gian De Belder
P&G, Packaging R&D – Sustainability

Pierandrea Quarta
Head&Shoulders Global Brand Manager



Agenda

1. Who we are
2. Sustainability Strategy & Goals (focus packaging)
3. Partnerships Circular Economy: The New Plastics Economy & Petcore Europe
4. PCR innovations
5. Head & Shoulders: the power of a grey bottle





Who We Are



P&G at a Glance

Sales
\$65.3 Billion

Countries of Operations
~70

Countries Where Our Brands Are Sold
180+

Consumers Served by Our Brands
Nearly 5 Billion

P&G | EST. 1837

Some of the world's
most trusted brands





Our Sustainability Strategy & Goals



Our Sustainability Strategy

3 pillars:

 **Climate**

 **Water**

 **Waste**

Focus on packaging !



Our 2020 Goals related to packaging:

- **ZERO** manufacturing waste to landfill
- Use **100%** recycled or 3rd party certified paper packaging
- **90%** of packaging is either recyclable or programs in place to recycle it
- Create technologies to substitute petroleum-derived raw materials with renewable materials
- **20%** packaging reduction per consumer use
→ **Light Weight**
- **Double** our use of recycled resin in plastic packaging → **PCR**

 **Waste**

**“Same Performance,
Less Materials”**





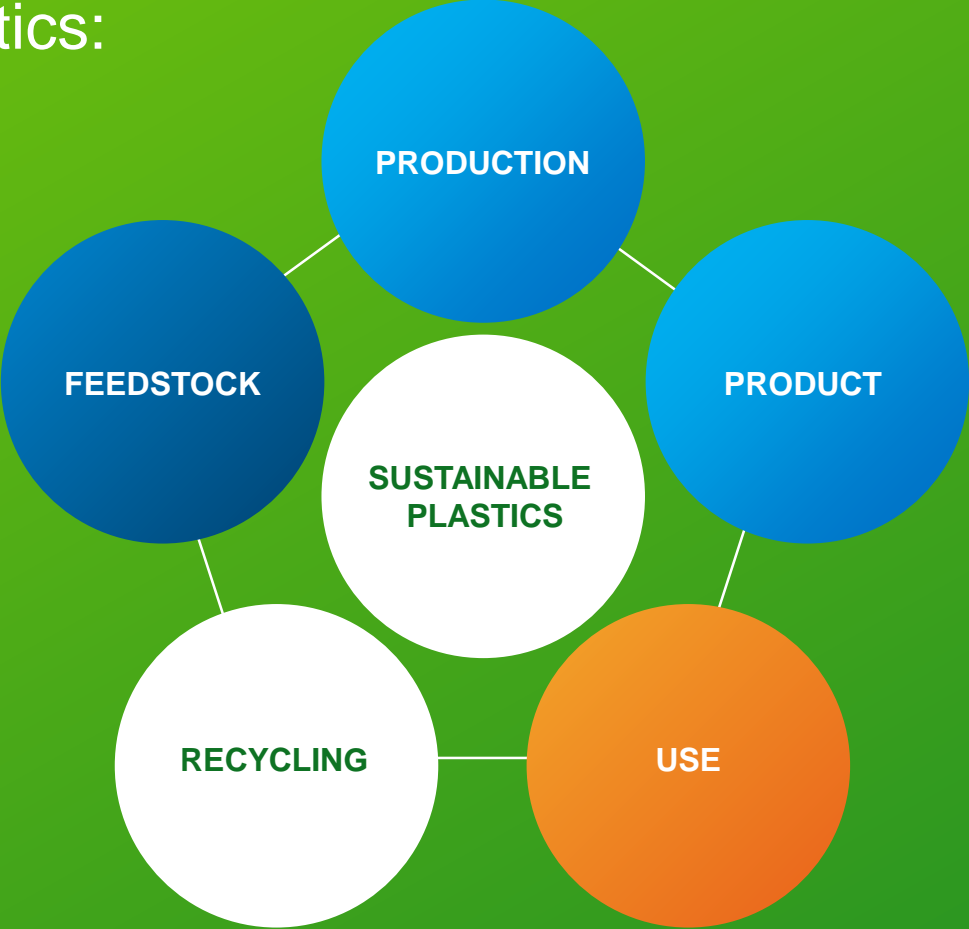
Partnerships

Circular Economy/ The New Plastics Economy



Circular Economy

More sustainable plastics:
A circular approach



Source: European Commission, DG Grow & DG Environment



Working towards successful CE

EU Plastic Strategy:

- Clearer definitions
- Eco-design: should be LCA-driven
- Need for EU EoW (End-of-Waste) criteria
- Scale & Harmonization
- EU financial incentives



5 pillars for a Circular Economy

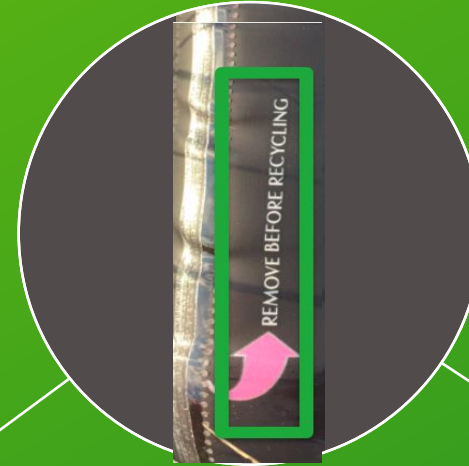
- Recycling & recyclability
- New partnerships needed to achieve CE!



Design-for-Recycling

0.

DESIGN-FOR-RECYCLING
(Eco-design)



Consumer msg!
PCR content



3.

SEPARATION

New Plastics Economy

- **New Plastics Economy:** bring together key stakeholders to re-think and re-design the future of plastics.
- **P&G :** Active participant in New Plastics Economy
 - Standardization of Tracer/Watermark sorting ; to be worked as Pioneer Project (including full value chain)



| | | | |
|---|---|--|--|
|  DANONE | L'ORÉAL |  P&G |  PEPSICO |
|  suez |  VEOLIA |  TERRACYCLE |  wrap |
|  BOREALIS Keep Discovering |  RPC bpi recycled products |  Constania Flexibles |  TOMRA SORTING SOLUTIONS RECYCLING |
|  Think Beyond PLASTIC |  nextek SUSTAINABLE SOLUTIONS FOR POLYMER & RECYCLING |  eapro European Association Of Plastics Recycling & Recovery Organisations |  HTP Recycling Renewables Technical Consulting |



Participant-led innovation project: HolyGrail

- 2 technology routes
- Public workshop to identify top 5 needs:
- (draft) White paper by Dec 17



Looks like this



Performs like this



4.

2x PCR

New Petcore Working Group: ODR

New Petcore Working Group on ODR
Opaque and Difficult to Recycle PET Packaging

- Platform for discussion
(full value chain approach)
 - Chair: P&G ; Co-Chair: PRE
 - 6 task forces
- Current focus: opaque and SSL

35 PARTICIPANTS:

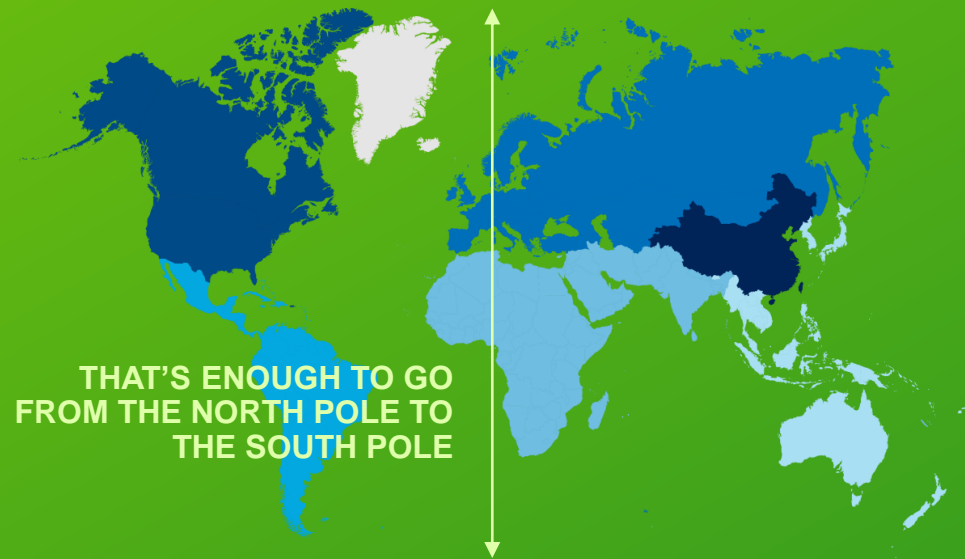


PCR



PCR in Fabric Care

- Ariel, Dash and Lenor will be made with up to **50%** post consumer recycled content. (+3.8 ktons/yr PCR)
- Equals **230 million** packs



PCR in Hair Care

- By end 2018: > **0.5 bn** bottles/yr
(>90% of all EU Hair Care bottles of Pantene™ + Head & Shoulders™)
- WEF Davos 17: announcement of the world's first recyclable shampoo bottle made from up to **25%** recycled beach plastics.





Marketing a better planet: the power of a grey bottle





A universal problem

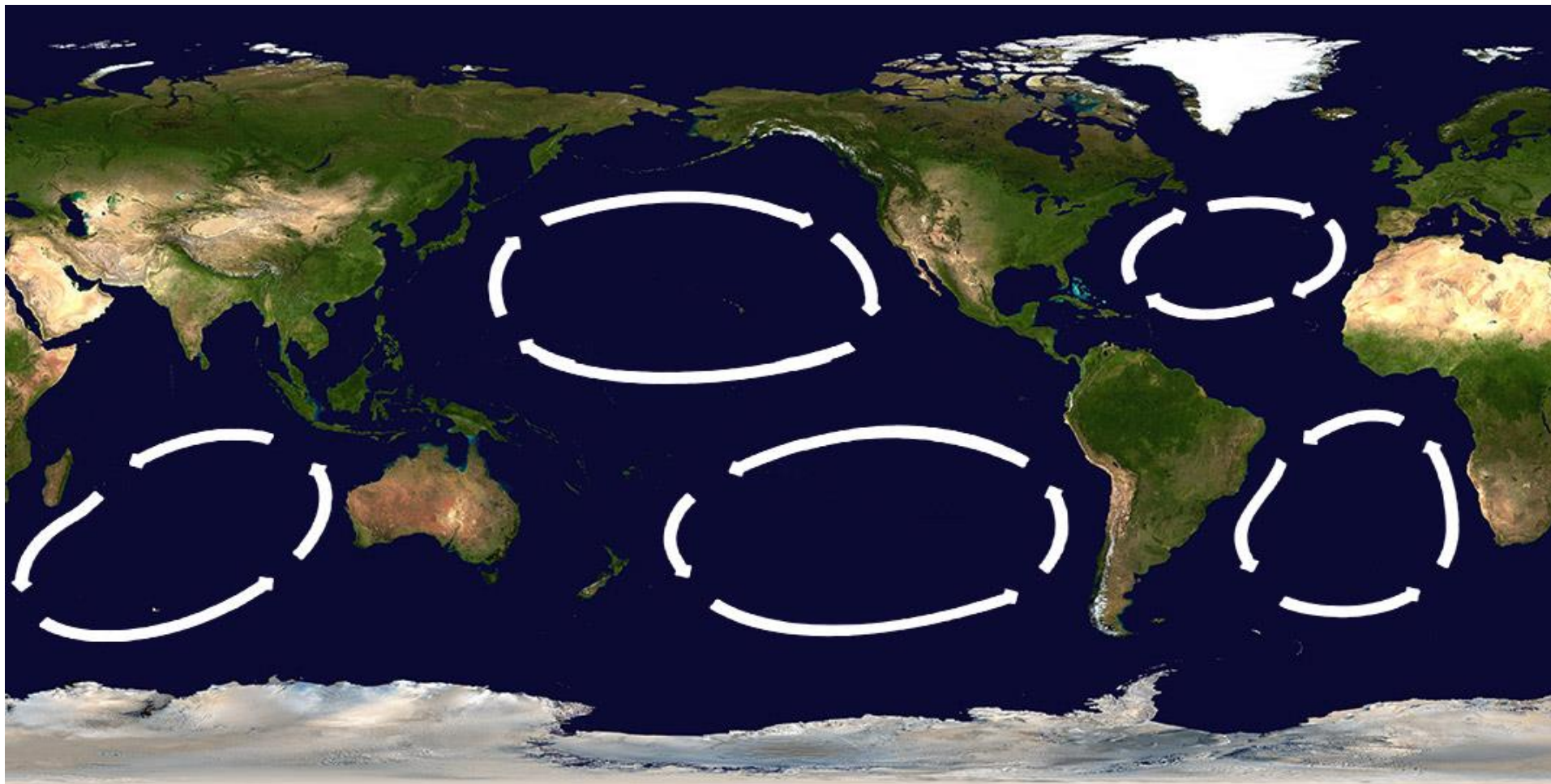
50%

1000000000

Another universal problem



Another universal problem



WEF 2016: the Ellen MacArthur foundation announces that **by 2050 there will be more plastic than fish in the ocean**



WEF 2016: the Ellen MacArthur foundation announces that **by 2050 there will be more plastic than fish in the ocean**



WEF 2017: Head&Shoulders and P&G announce their attempt to solve part of the issue:

- 1st shampoo bottle ever made of beach plastic
- Min. 25% PCR integration in 95% of haircare bottles in Europe





18 January 2017
P&G unveils first recyclable shampoo bottle made with 'beach plastic'
 Beginning this summer, P&G will offer its Head & Shoulders shampoo in a limited-edition recyclable bottle made in part from material collected from plastic waste found on beaches.

The result?

Une bouteille de shampooing issue de plastique collecté sur les plages
 Créée par Head & Shoulders, en partenariat avec Suez en France, la première bouteille de shampooing verte sera disponible en France cet été. Elle est faite à 20 % de plastique collecté sur les plages et recyclable après usage. Le lancement des shampooings verts est une première mondiale. La marque Head & Shoulders annonce un objectif de 25 % de plastique recyclé dans ses produits de soins capillaires d'ici 2020. Une bouteille issue de plastique collecté sur les plages et recyclable après usage. Cette bouteille de shampooing sera disponible en France cet été. Elle est faite à 20 % de plastique recyclé.

Procter & Gamble unveils beach plastic shampoo bottle
 Consumer goods firm Procter & Gamble - manufacturer of the Head & Shoulders shampoo brand - has announced the production of a recyclable shampoo bottle made from up to 25% recycled plastic collected from beaches.
 The limited-edition HEPE bottle will go on sale in summer 2017 to consumers at the French supermarket chain Carrefour and involves the largest production run of recyclable bottles made with recycled beach plastic. The company says.
 Unveiling the bottle at a press conference at the World Economic Forum in Davos, Switzerland, on January 17th, January, P&G also pledged to use up to 25% post-consumer recycled plastic in around half a billion bottles across its France and Head & Shoulders ranges by the end of 2018.
 P&G is working with consumer recycling firm Terracycle and Suez on the production of the recycled plastic bottles. The bottles will contain the same amount of shampoo as standard bottles of recycled HEPE per liter. The material will be sourced from post-consumer material, but may also involve some beach plastic. Terracycle has confirmed.
 In announcing the initiative, Virginia Helen, P&G's vice president of global sustainability, said: "At P&G, we believe that always goes better than words. The recycled use of post-consumer recycled plastic across our hair care portfolio of brands demonstrates our continued commitment to driving real change. The Head & Shoulders recyclable shampoo bottle made with beach plastic is the world's first in the hair care category."

Découvrez la bouteille shampooing 100 % éco
 La marque Head & Shoulders lance en France des shampooings issus de déchets plastiques ramassés
 marketing développement durable est en marche!

P&G's new circular economy project will require a supply of 2.6 million tons of plastic waste
 MATT NICKMAN
 January 18, 2017, 11:23 am
 P&G's new circular economy project will require a supply of 2.6 million tons of plastic waste, the same weight as eight fully loaded Boeing 747 jumbo jets.

From beach to bathtub: Procter & Gamble unveils world's first recyclable shampoo bottle made with beach plastic
 The limited-edition HEPE bottle will go on sale in summer 2017 to consumers at the French supermarket chain Carrefour and involves the largest production run of recyclable bottles made with recycled beach plastic. The company says.
 Unveiling the bottle at a press conference at the World Economic Forum in Davos, Switzerland, on January 17th, January, P&G also pledged to use up to 25% post-consumer recycled plastic in around half a billion bottles across its France and Head & Shoulders ranges by the end of 2018.
 P&G is working with consumer recycling firm Terracycle and Suez on the production of the recycled plastic bottles. The bottles will contain the same amount of shampoo as standard bottles of recycled HEPE per liter. The material will be sourced from post-consumer material, but may also involve some beach plastic. Terracycle has confirmed.
 In announcing the initiative, Virginia Helen, P&G's vice president of global sustainability, said: "At P&G, we believe that always goes better than words. The recycled use of post-consumer recycled plastic across our hair care portfolio of brands demonstrates our continued commitment to driving real change. The Head & Shoulders recyclable shampoo bottle made with beach plastic is the world's first in the hair care category."

This New Shampoo Will Clean Your Hair — And The Oceans
 Head & Shoulders bottles will use recycled plastics removed from beaches and oceans.
 Head & Shoulders bottles will use recycled plastics removed from beaches and oceans. The bottles will contain the same amount of shampoo as standard bottles of recycled HEPE per liter. The material will be sourced from post-consumer material, but may also involve some beach plastic. Terracycle has confirmed.
 In announcing the initiative, Virginia Helen, P&G's vice president of global sustainability, said: "At P&G, we believe that always goes better than words. The recycled use of post-consumer recycled plastic across our hair care portfolio of brands demonstrates our continued commitment to driving real change. The Head & Shoulders recyclable shampoo bottle made with beach plastic is the world's first in the hair care category."

Fabriquée avec 25 % de déchets plastiques récoltés sur les plages
 Cette bouteille de shampooing du futur, la bouteille de shampooing fabriquée avec 25 % de déchets plastiques récoltés sur les plages de France et d'ailleurs au Nord, sera en vente à partir de l'été prochain chez Carrefour et chez les détaillants partenaires de Carrefour en France et en Espagne. Cette bouteille de shampooing sera disponible en France cet été. Elle est faite à 20 % de plastique recyclé.

P&G unveils beach plastic plan for Head & Shoulders bottle
 P&G Circular Economy Partnership Creates World's First Recyclable Shampoo Bottle Made With Beach Plastic
 P&G's new circular economy project will require a supply of 2.6 million tons of plastic waste, the same weight as eight fully loaded Boeing 747 jumbo jets.

1.2 Bn impressions

Consumer goods firm Procter & Gamble - its brand - has announced the production of a recycled plastic collected from beaches.
 The limited-edition HEPE bottle will go on sale in supermarket chain Carrefour and involves the same weight as eight fully loaded Boeing 747 jumbo jets.

P&G annuncia il primo flacone di shampooing riciccolato sulle spiagge
 La multinazionale Procter & Gamble ha annunciato che a partire da quest'estate, in Francia, sarà possibile acquistare un flacone di shampooing verde. La nuova bottiglia di shampooing è realizzata con il 20% di plastica riciclata proveniente dalle spiagge. La nuova bottiglia di shampooing sarà disponibile in Francia a partire dall'estate.

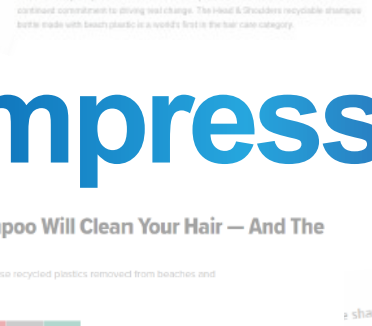
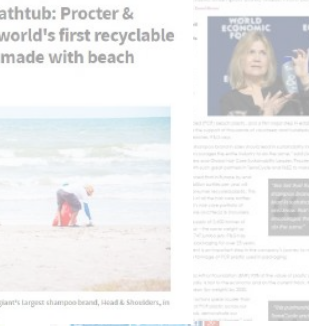
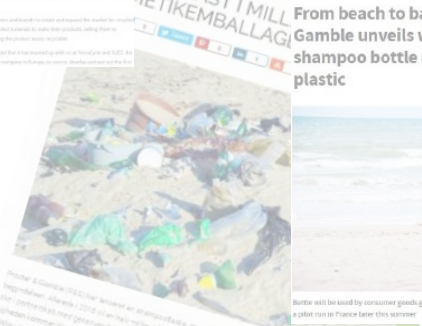
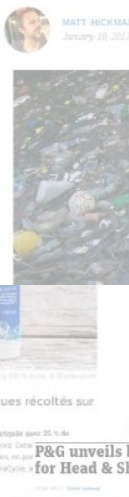
Head & Shoulders, un marchio con Procter & Gamble, lancia una nuova linea di shampooing verde. La nuova bottiglia di shampooing è realizzata con il 20% di plastica riciclata proveniente dalle spiagge. La nuova bottiglia di shampooing sarà disponibile in Francia a partire dall'estate.
 Head & Shoulders, un marchio con Procter & Gamble, lancia una nuova linea di shampooing verde. La nuova bottiglia di shampooing è realizzata con il 20% di plastica riciclata proveniente dalle spiagge. La nuova bottiglia di shampooing sarà disponibile in Francia a partire dall'estate.

Suez Environnement de shampooing reciclé à partir de plastique des plages
 Head & Shoulders de shampooing reciclé à partir de plastique des plages.
 Head & Shoulders de shampooing reciclé à partir de plastique des plages.

P&G's Head & Shoulders Creates World's First of Its Kind Recyclable Shampoo Bottle
 Procter & Gamble ne s'arrêtera pas de doubler la quantité de plastique recyclé d'ici à 2020. Dans un demi milliard de bouteilles de shampooing, il prévoit d'en fabriquer jusqu'à 2600 tonnes.

P&G's Head & Shoulders Launches World's First Recyclable Shampoo Bottle Made With Beach Plastic
 P&G's new circular economy project will require a supply of 2.6 million tons of plastic waste, the same weight as eight fully loaded Boeing 747 jumbo jets.

P&G annuncia il primo flacone di shampooing riciccolato sulle spiagge
 La multinazionale Procter & Gamble ha annunciato che a partire da quest'estate, in Francia, sarà possibile acquistare un flacone di shampooing verde. La nuova bottiglia di shampooing è realizzata con il 20% di plastica riciclata proveniente dalle spiagge. La nuova bottiglia di shampooing sarà disponibile in Francia a partire dall'estate.



Key learnings from the project:

1. The world is demanding greener products



Why not the WEF?

1. High level forum → PMs and CEOs
2. Media focusing on geo-political issues
3. Right after Trump election → Attention focus

Why ~~not~~ the WEF?

1. High level forum → PMs and CEOs
2. Media focusing on geo-political issues
3. Right after Trump election → Attention focus

WORLD ECONOMIC FORUM

COMMITTED TO
IMPROVING THE STATE
OF THE WORLD





Craft the overall story



500,000,000



Key learnings from the project:

1. The world is demanding greener products
2. Shift paradigms to make it news-worthy

PANTONE®
11-4001 TCX
Brilliant White

PANTONE®
11-4001 TCX
Brilliant White

PANTONE®
11-4001 TCX
Brilliant White

PANTONE®
11-4001 TCX
Brilliant White

PANTONE®
11-4801 TCX
Tofu

PANTONE®
11-4801 TCX
Tofu

PANTONE®
11-4801 TCX
Tofu

PANTONE®
11-4801 TCX
Tofu

PANTONE®
11-0607 TCX
Sugar Swizzle

PANTONE®
11-0607 TCX
Sugar Swizzle

PANTONE®
11-0607 TCX
Sugar Swizzle

PANTONE®
11-0607 TCX
Sugar Swizzle

PANTONE®
11-0608 TCX
Coconut Milk

PANTONE®
11-0608 TCX
Coconut Milk

PANTONE®
11-0608 TCX
Coconut Milk

PANTONE®
11-0608 TCX
Coconut Milk

PANTONE®
11-0607 TCX
Sugar Swizzle

PANTONE®
11-0607 TCX
Sugar Swizzle

PANTONE®
11-0608 TCX
Coconut Milk

PANTONE®
11-0608 TCX
Coconut Milk

PANTONE®
11-0608 TCX
Coconut Milk

PANTONE®
11-0608 TCX
Coconut Milk

PANTONE®
11-4302 TCX
Cannoli Cream

PANTONE®
11-4302 TCX
Cannoli Cream

PANTONE®
11-4302 TCX
Cannoli Cream

PANTONE®
11-4302 TCX
Cannoli Cream

PANTONE®
11-1302 TCX
Sea Salt

PANTONE®
11-1302 TCX
Sea Salt

PANTONE®
11-1302 TCX
Sea Salt

PANTONE®
11-1302 TCX
Sea Salt

PANTONE®
11-0110 TCX
Buttercream



Turning a flaw into an advantage



VS



Key learnings from the project:

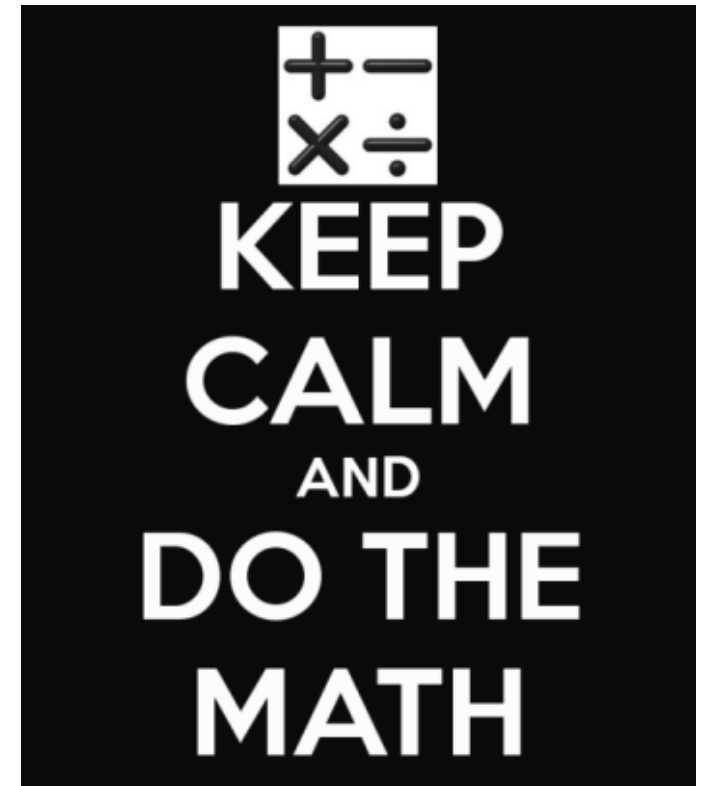
1. The world is demanding greener products
2. Shift paradigms to make it news-worthy
3. Privileged place to make a difference

Average global annual CO2 emission:

4 metric tons

Global brand CO2 emission:

100,000,000 metric tons



$$2 \times 80 = 160$$

$$0.1\% \rightarrow 100,000$$

625 years (8 lives!)

**YOU
CAN
MAKE A
DIFFERENCE**



I WILL
I WILL
I WILL
I WILL
I WILL
I WILL
I WILL
I WILL

Making Every Moment Count

Thank You!



Gian De Belder
Temselaan 100
B-1853 Strombeek-Bever
Belgium
Email: debelder.g@pg.com

Pierandrea Quarta
Head&Shoulders Global Brand Manager
Route de St-Georges 47 | 1213 Petit-Lancy
Switzerland
Email: quarta.p@pg.com

