

Current trends in the packaging industry

FFI Verkaufsleiterseminar, February 12-13, 2026

Dr. Daniel Bornemann, Senior Partner

SIMON 
KUCHER
Unlocking better growth



Award winner

We are the growth strategy leader – **#1 Consultancy for Growth Strategies** awarded by numerous external institutions

Industry knowledge

We have a **strong track record** on supporting **packaging companies** on commercial excellence

Local & global experts

Our local & global experts provide cutting-edge insights on **paper & packaging markets**

Functional expertise

With our outstanding sales focus, we offer **best-in-class strategy development/design**, measure detailing and joint implementation

Market insights

Our ready-to-use tools, assets & technology enable a quick start with industry & functional best practices



2

- Aptar
- August Faller
- B+K
- Coveris
- DS Smith Packaging
- ELOPAK
- ESSITY
- Faerch
- Huhtamaki
- Klingele
- Klöckner Pentaplast
- Mayr-Melnhof
- Mondi
- Mauser
- Stora Enso
- Thimm
- UPM
- Vetropack
- ...

>100 paper and packaging projects

3

>300 local experts supporting projects on site

4

>3,000 strategy, sales & pricing projects in recent years

5

Experts for digital growth

Experts for software

Selected paper and packaging references



Albea	Engel	Illig	Pacur	Schott
Ahlstrom	Eska	Johns Manville	Papeteries du Lemman	SGD Pharma
Airnov	ESSITY	Klöckner Pentaplast	Papierfabrik Palm	Sidel
Antalis	Europapier	KraussMaffei	Papyrus	SIG
APTAR	Faerch	Lenzing	Prinovis	Sihl
Arjowiggins	Fort Dearborn	Liveo	PSB	STI
August Faller	GEA	Mayr Melnhof	Raflatac	Stora Enso
Avery Dennison	Gissler & Pass	Mauser	Ramondin	Texen
Ball Packaging	GUNDLACH	Mondi	Reifenhäuser	Thimm
BISCHOF + Klein	Heidelberg	Netstal	Rovema	UPM
CHEP	Huhtamaki	Nordic Paper	Sappi	Vetropack
Coveris	Hydro	O-I	SCA	Vidrala
DS Smith Packaging	Iberfoil	Optima Packaging	Schelling	Westrock
ELOPAK	Iconex	PacsOn	Schoeller Arca Systems	...



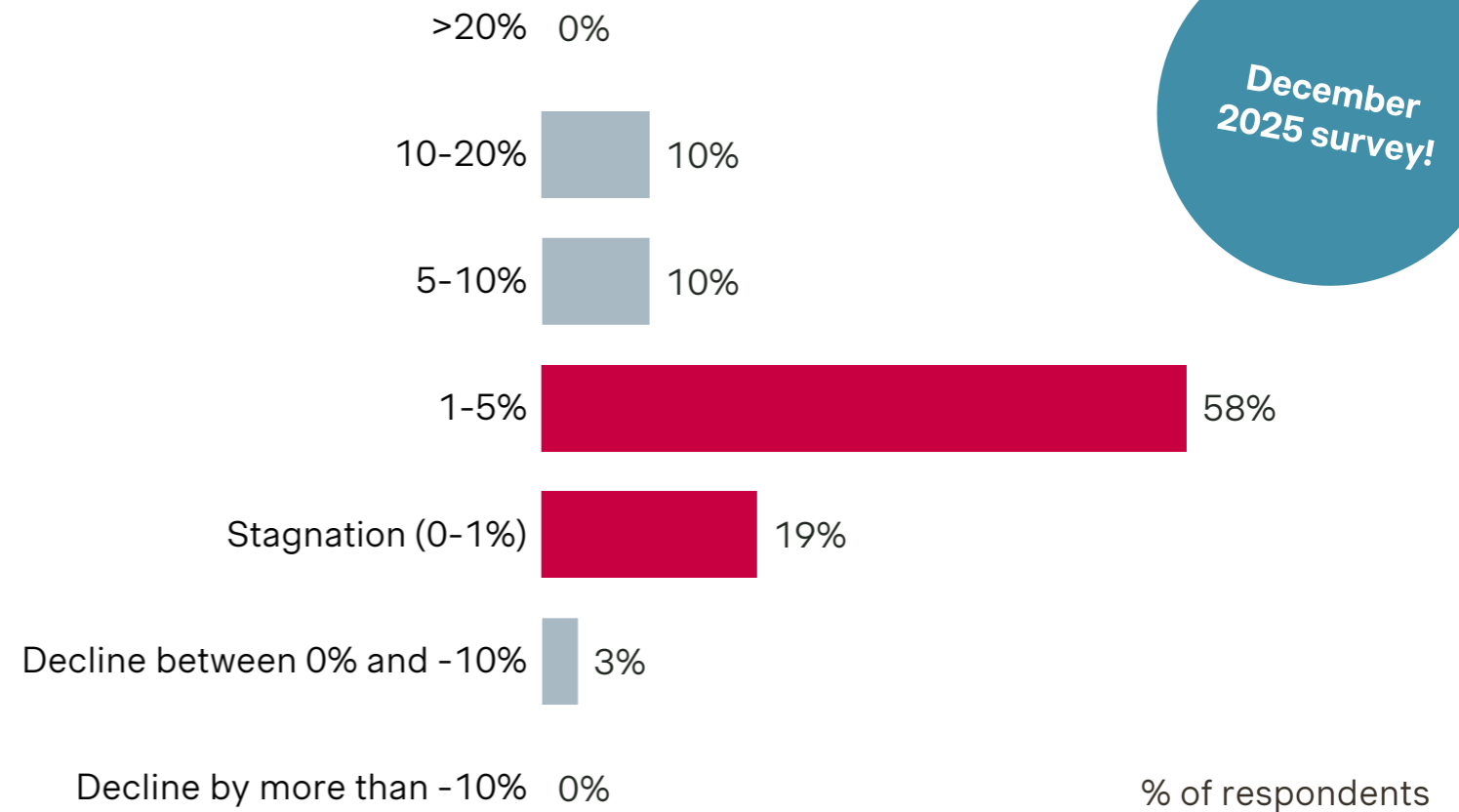
Volatile conditions continue in the packaging industry

- Overcapacity in several market segments
- Industry consolidation continues
- Still volatile cost situation
- Weak demand, e.g. in parts of the industrial sector
- Shifting consumer budgets
- PPWR looming at the horizon
- Plastic to paper conversion continues
- ...



Growth: Packaging companies expect modest growth for 2026!

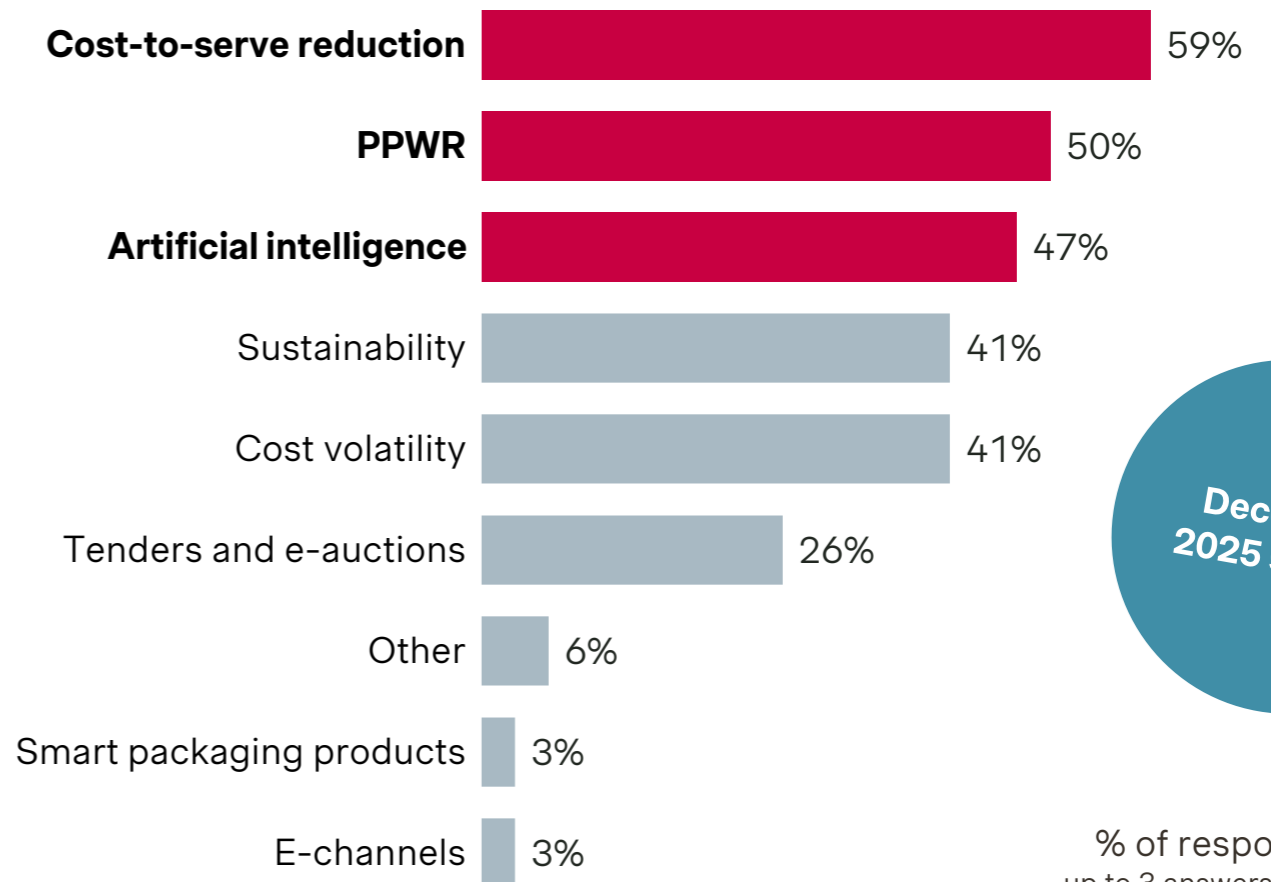
WHAT GROWTH RATE IS YOUR COMPANY EXPECTING IN 2026?



Source: Simon-Kucher Packaging Industry Webinar, Dec 2025, n=31

Trends: Cost-reduction, PPWR, and AI are key trends for 2026!

WHAT ARE THE MOST RELEVANT TRENDS FOR 2026?



December
2025 survey!

































% of respondents
up to 3 answers possible

Source: Simon-Kucher Packaging Industry Webinar, Dec 2025, n=34

Cost-to-serve reduction

A hand is shown balancing a wooden beam on a fulcrum. On the right side of the beam, there are three stacks of gold coins of increasing height from left to right. The background is a blurred image of a person in a white shirt.

Make cost-to-serve transparent | **Align service levels with effective customer value**

	Revenue	Margin	Cost to serve	Profit
Customer A	 120	 12	 2	 10
Customer B	 118	 18	 11	 7
Customer C	 101	 17	 5	 12
Customer D	 85	 6	 4	 2
Customer E	 83	 12	 2	 11
Customer F	 81	 13	 14	 -1
Customer G	 77	 10	 4	 6
Customer H	 57	 6	 3	 3

Use high service level in value selling argumentation

Cost to serve / service level needs to be considered

Profit through value-added services | Differentiate and monetize your services by segment – to unlock untapped profit potential!









Project example

Area	Service	Service type	A-Customer	B-Customer	C-Customer
Customer support	Training for customers about XX products	Standard service	F	F	N
	Customer events (e.g., site visits)	Standard service	F	C	N
	Planning support (e.g., product configuration)	Valuable service	F	F	N
	Technical support on client-site / remotely	Valuable service	F	F	N
	Trial reels	Charged service	F	C	C
Sustainability	Sustainability expertise / consulting	Standard service	F	F	N
	Life cycle analysis	Valuable service	F	C	N
	CO2 calculations	Valuable service	F	C	N
	Certificates	Standard service	F	C	C
	Supply chain audit	Valuable service	C	C	N
Logistics	Stock keeping	Charged service	F	C	C
	Express delivery	Charged service	C	C	C
	Specified delivery time window	Valuable service	F	C	N
Order	Late order change (e.g., product mix, volume, date)	Charged service	C	C	N
	Order cancellation (i.e., ability to a cancel placed order)	Charged service	F	F	C
	Small orders (i.e., ability to order low volumes)	Charged service	C	C	C

Not everything is industry standard! Certain services can be charged for most customers or avoided.

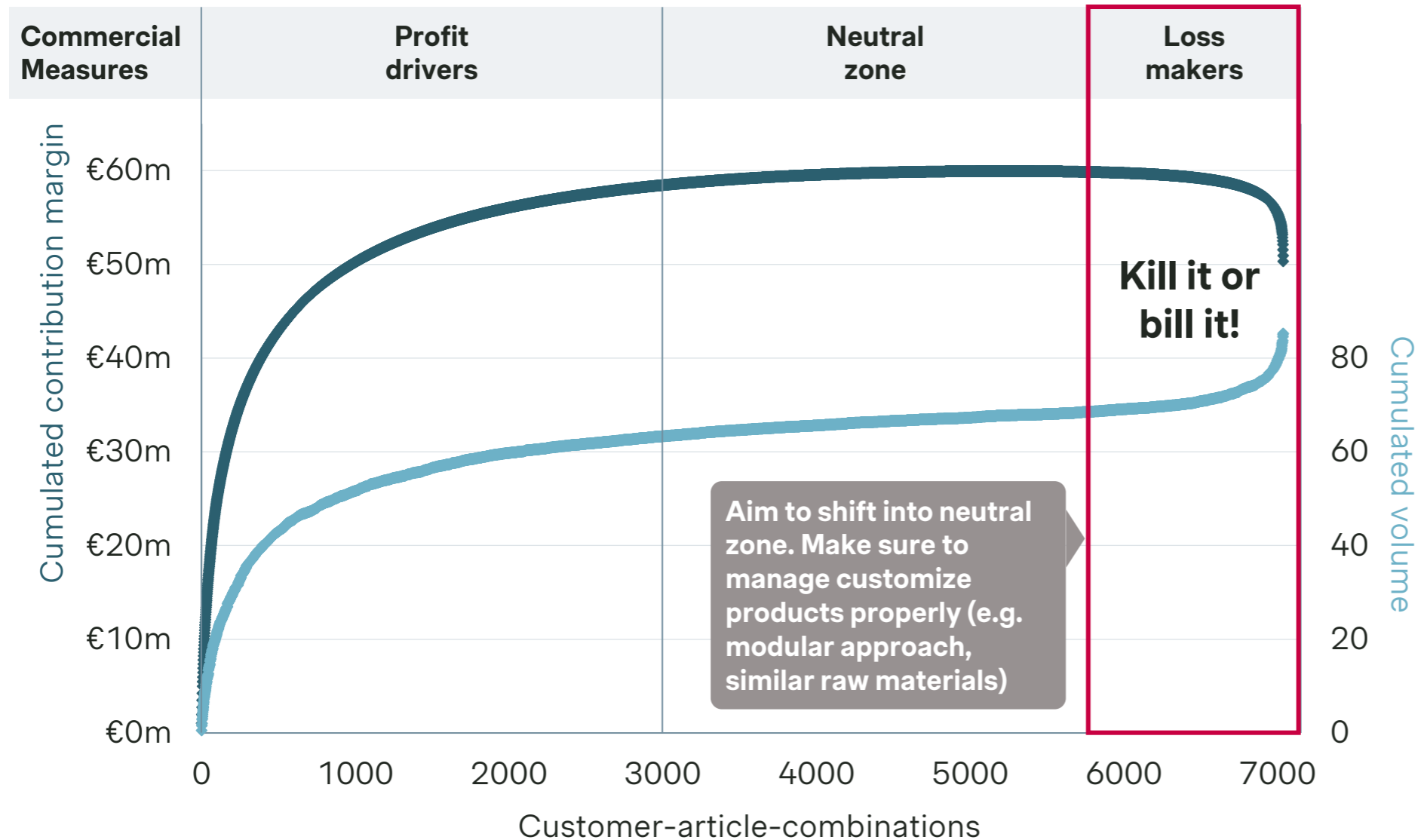
Optimize logistics and cost-to-serve | **Enforce pallet and minimum-order-value surcharges in the short-term and pursue MOQ surcharges with greater intensity!**

Project example

	Pallet Surcharge: Surcharge for packaging not ordered on full pallets	Minimum Order Quantity (MOQ): Surcharge for small order quantities	Minimum Order Value (MOV): Surcharge for small order values
Change of Order Behavior 	+++ <i>Impact on customers' core business via packaging unit price</i>	++ <i>Additional fee for small orders outside pallet sizes</i>	+ <i>Excludes core packaging business; covers only accessories</i>
Ease of Implementation 	+++ <i>Continuation of current system</i>	+ <i>New system required; Order behavior reflected in prices; manual logic needed to identify items for action</i>	+++ <i>System already in place, values need to be revised</i>
Range of Applicability 	++ <i>Applies to packaging only, all order sizes except 1-3 pallets</i>	+ <i>Applicable to packaging only in the range of small order quantities</i>	++ <i>Applicable to accessories</i>
Impact 			
Implementation 	Continue implementation right away	Incorporate in future pricing to benchmark historic discounts	Update/increase existing surcharge values


Discourage small orders and reduce logistics costs

Cut low-volume articles to gain scale | **Focus your portfolio to unlock scale and free up resources for profit-driving articles!**



What to do:

- **Secure your profit drivers** by prioritizing the articles and their key customers that deliver the most value
- **Challenge the neutral zone** by reassessing the portfolio and internal processes
- **Address loss-makers** by improving pricing or cutting non-viable business

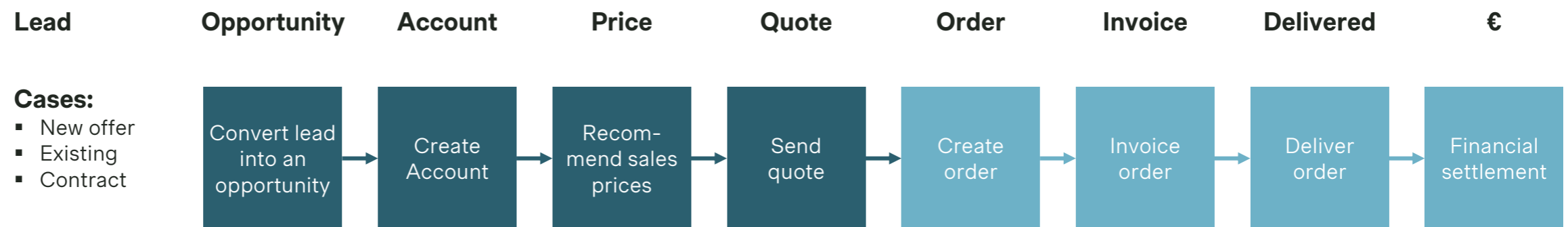


Digitize sales processes | Digitize and streamline your sales process with standardized workflows and one integrated CRM!

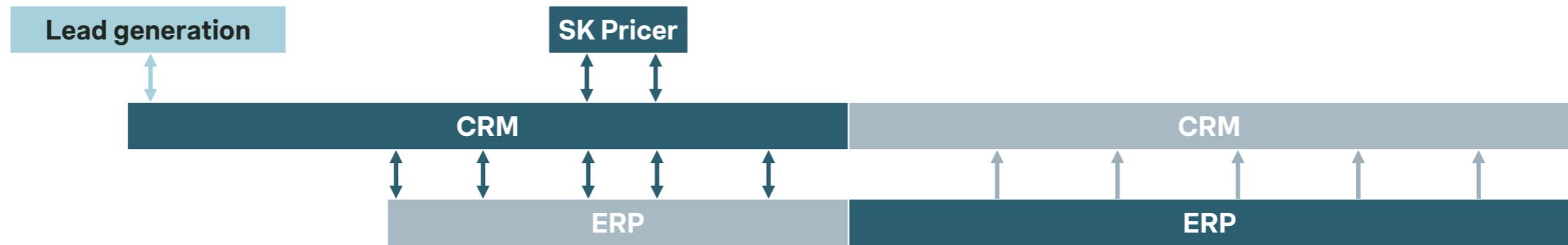
Project example



Process steps and details

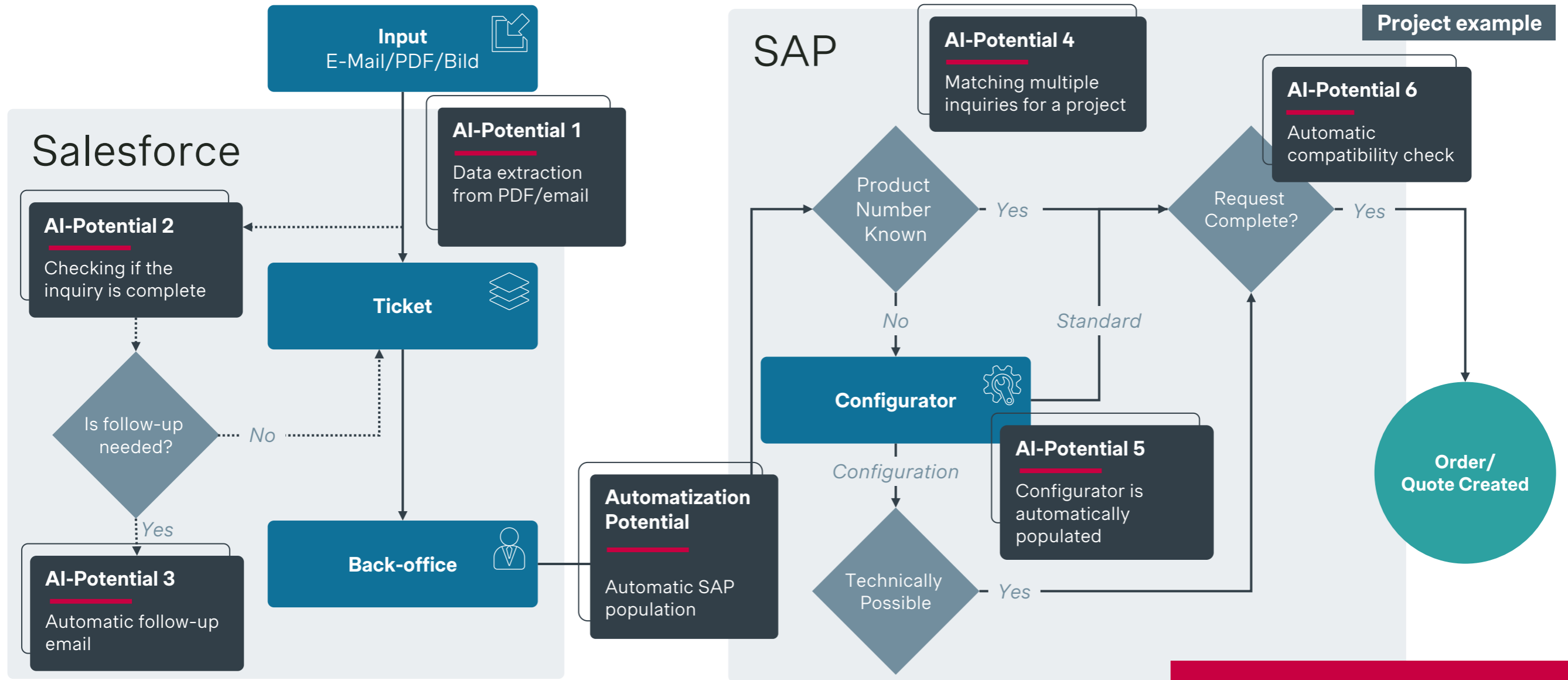


Main IT system



>60% of time saved
due to automated process

Digitize sales processes | **Selectively use AI to streamline key processes – start small, scale what works and unlock competitive advantage step by step!**



>30% of time saved
due to selective AI application

PPWR and Sustainability

100 %
BIODEGRADABLE
RECYCLABLE

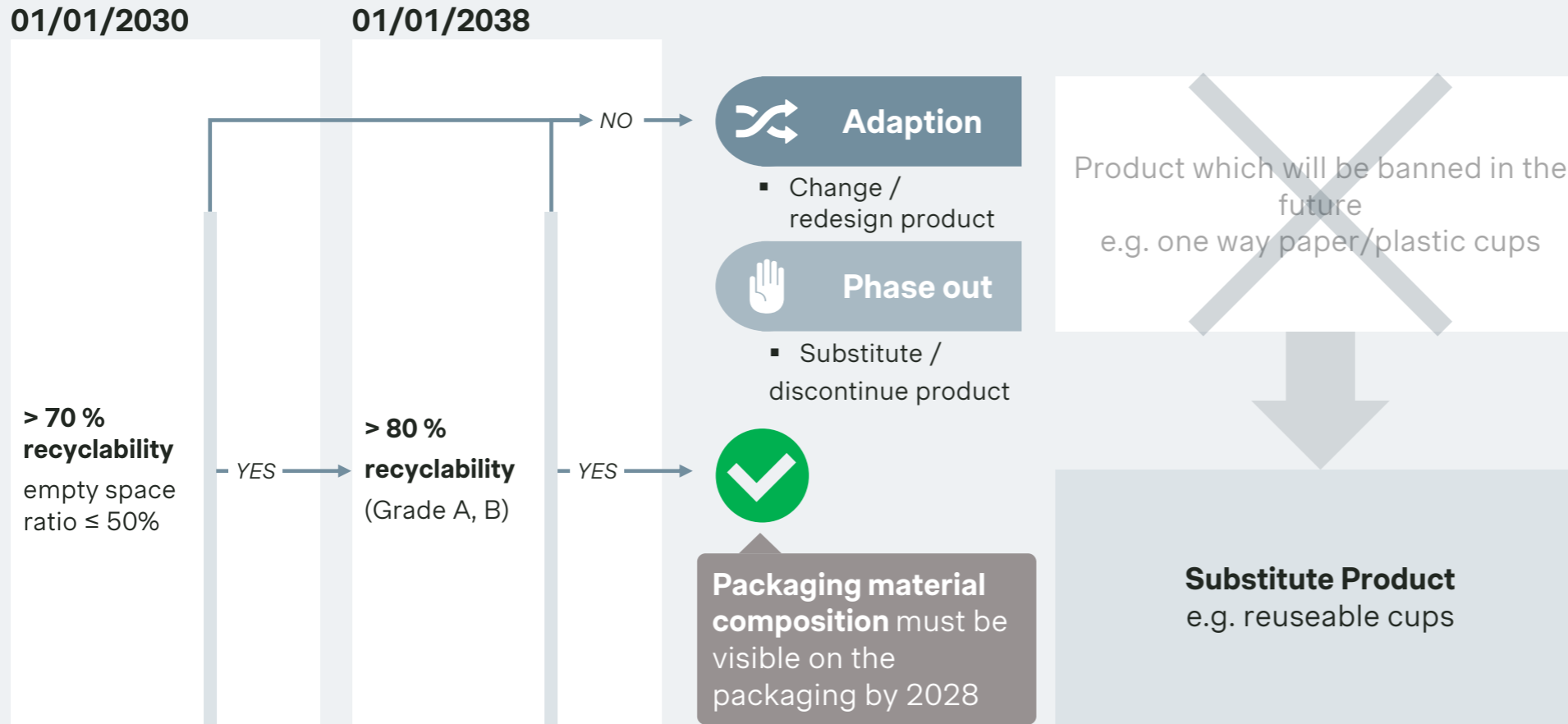


PPWR opportunities (and pitfalls) | Screen product portfolios for opportunities and risks for early PPWR alignment!

12/08/2026 - Implementation of the PPWR begins

12/08/2028 - Labelling obligation using PPWR labels

01/01/2030 - Major Milestone - Many rules take effect: Packaging with the lowest recyclability banned, re-use target are binding, recycled-content target apply, minimization rules enforced, ...



NEXT STEPS:



Portfolio risk screening

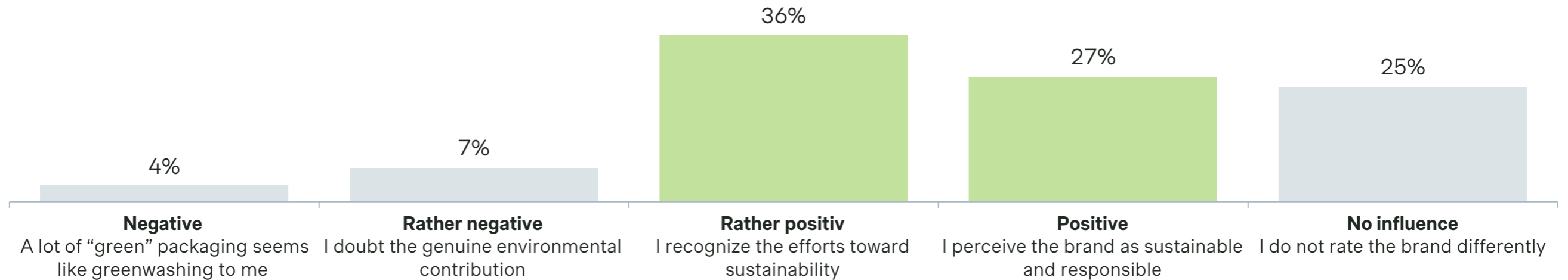
- Screen your portfolio for **PPWR risks and early-mover opportunities**
- **Map** all packaging materials and components **to PPWR requirements**
- **Prepare documentation** to secure compliance and avoid late-stage disruption



Sustainability survey results | Positive consumer perception offers manufacturers potential to strengthen brand!



How does the availability of environmentally friendly packaging influence your perception of a brand?



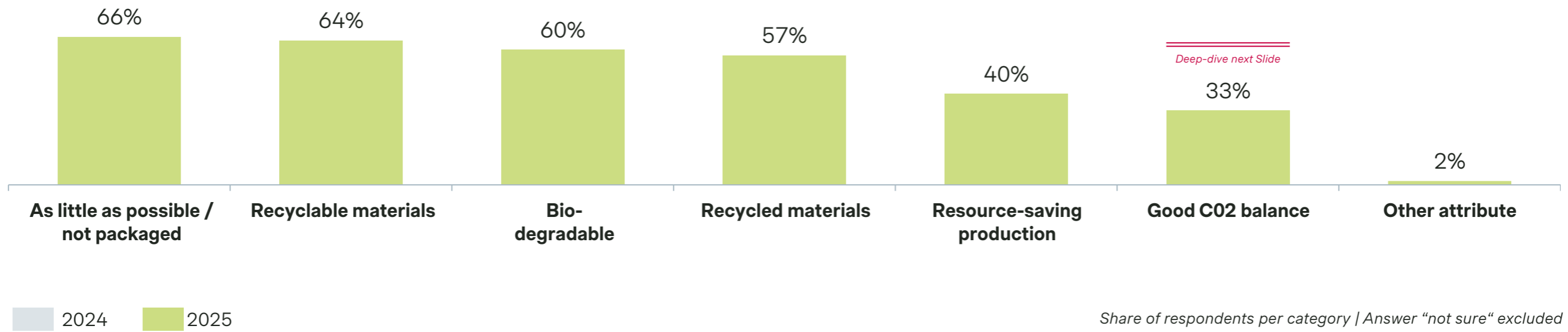
Share of respondents per category | Answer "not sure" excluded

Sustainability survey results | Waste prevention remains consumers' top priority in sustainable packaging!



Which of the following attributes characterize sustainable packaging for you?

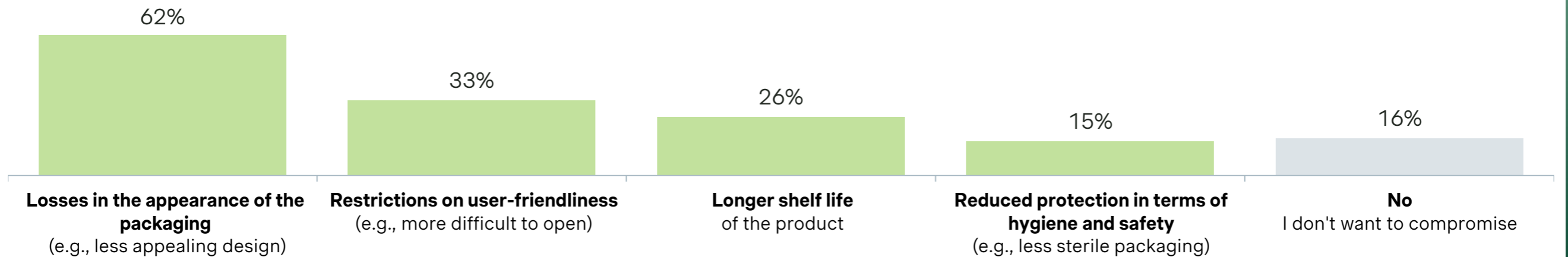
Unpackaged products, in particular, are increasingly linked to sustainability



Sustainability survey results | Consumers accept compromises in appearance - but not in durability and hygiene!



Which specific features would you be willing to sacrifice in favor of sustainable packaging?

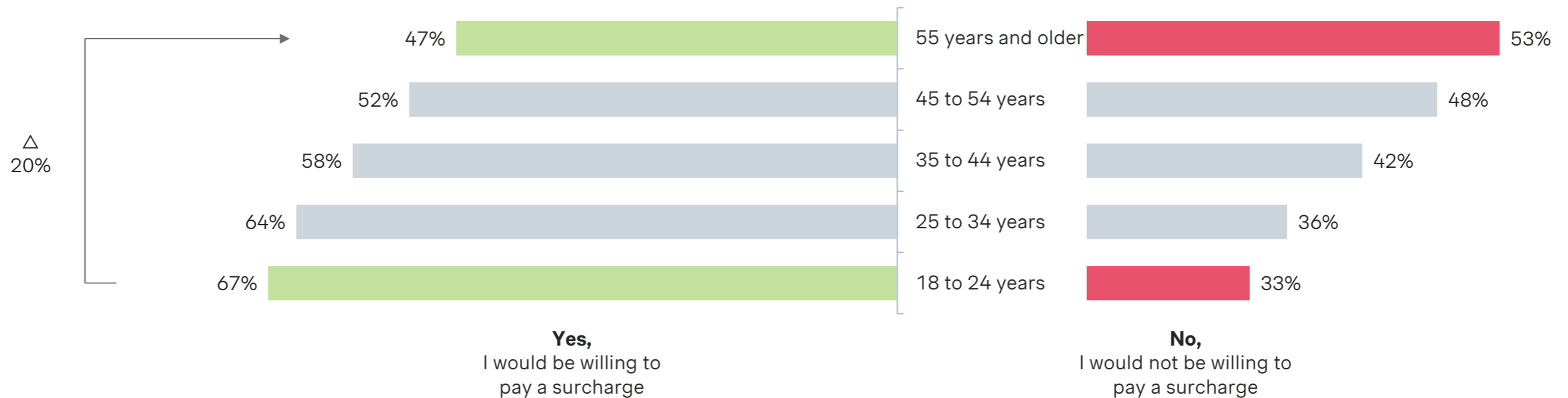


Share of respondents per category | Answer "not sure" excluded

Sustainability survey results | Young people are more often willing to pay more for sustainable packaging!

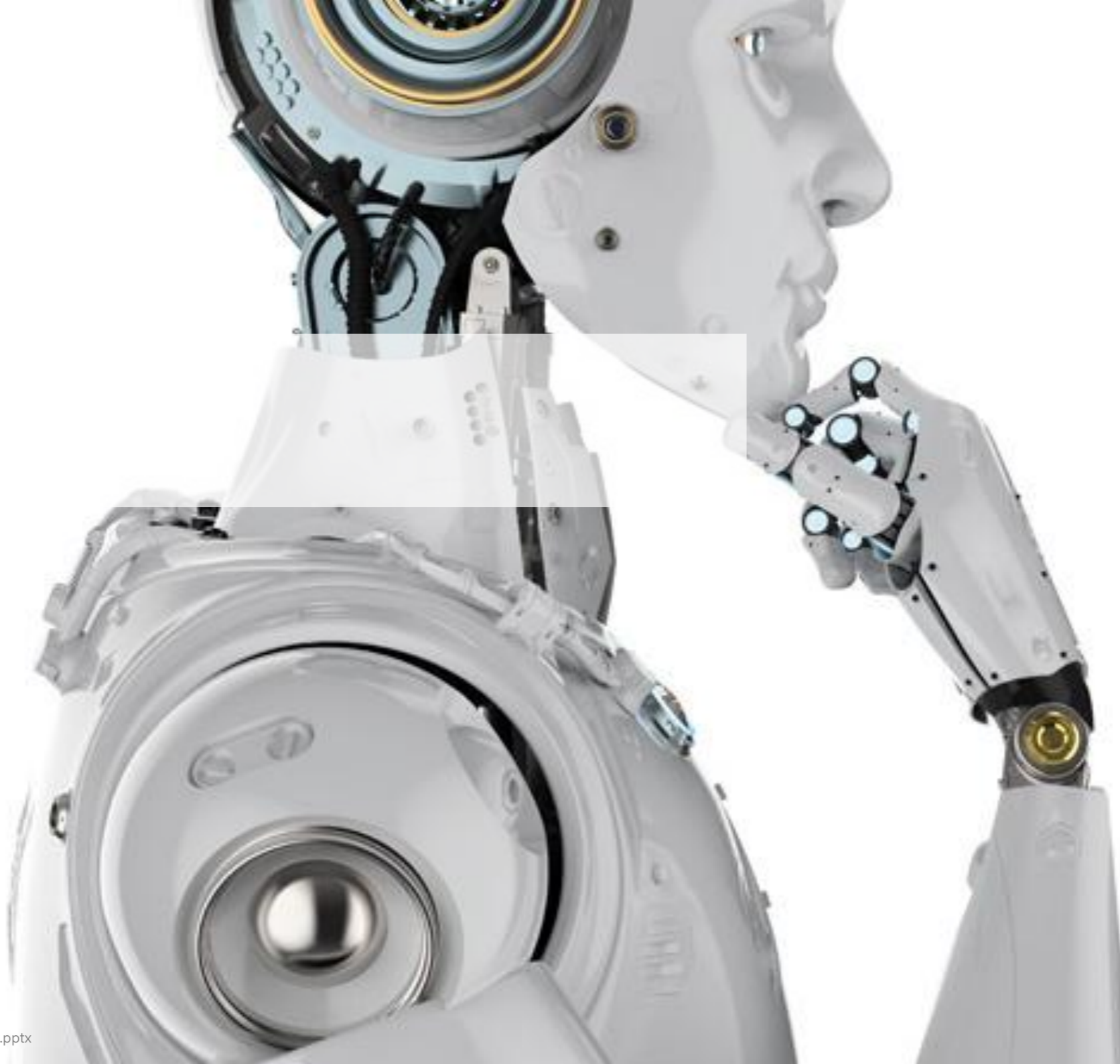


How much more would you be willing to pay for the more sustainably packaged version? ¹



Source: Simon-Kucher Consumer survey May 2025 "Sustainable Product Packaging" (n=2,031) 1) Question: Imagine you are standing in the supermarket in front of two identical products (e.g., pasta, yogurt, shampoo). The product in conventional packaging costs €2. The second product has significantly more sustainable packaging (e.g., made from recycled material); 2) Willingness to pay: 40% up to 5% more, 41% up to 10% more, 13% up to 20% more, 7% over 20% extra charge; weighting according to mean values.

AI



GenAI usage in enterprises | Early adopters moved beyond experimentation, focusing on domain-specific solutions and preparing for long-term maturity



Beginners

0 Stage
nothing done yet officially, employees using it on their own

Minimal investment
No dedicated budget, only few SaaS subscriptions and/or free tiers

Curiosity-driven pilots
Isolated experiments run by few teams

Early adopters

Enterprise GenAI Adoption
embedding generative AI into workflows

AI-Augmented Creativity
content generation, design assistance

Multimodal AI
Processing text, image, audio & video

Scaling AI

Personalized & Domain-Specific Models
fine-tuned models for industries

Agentic AI
Autonomous workflows & multi-agent systems

Workforce Upskilling
Retraining & human-AI collaboration skills

Long-term maturity

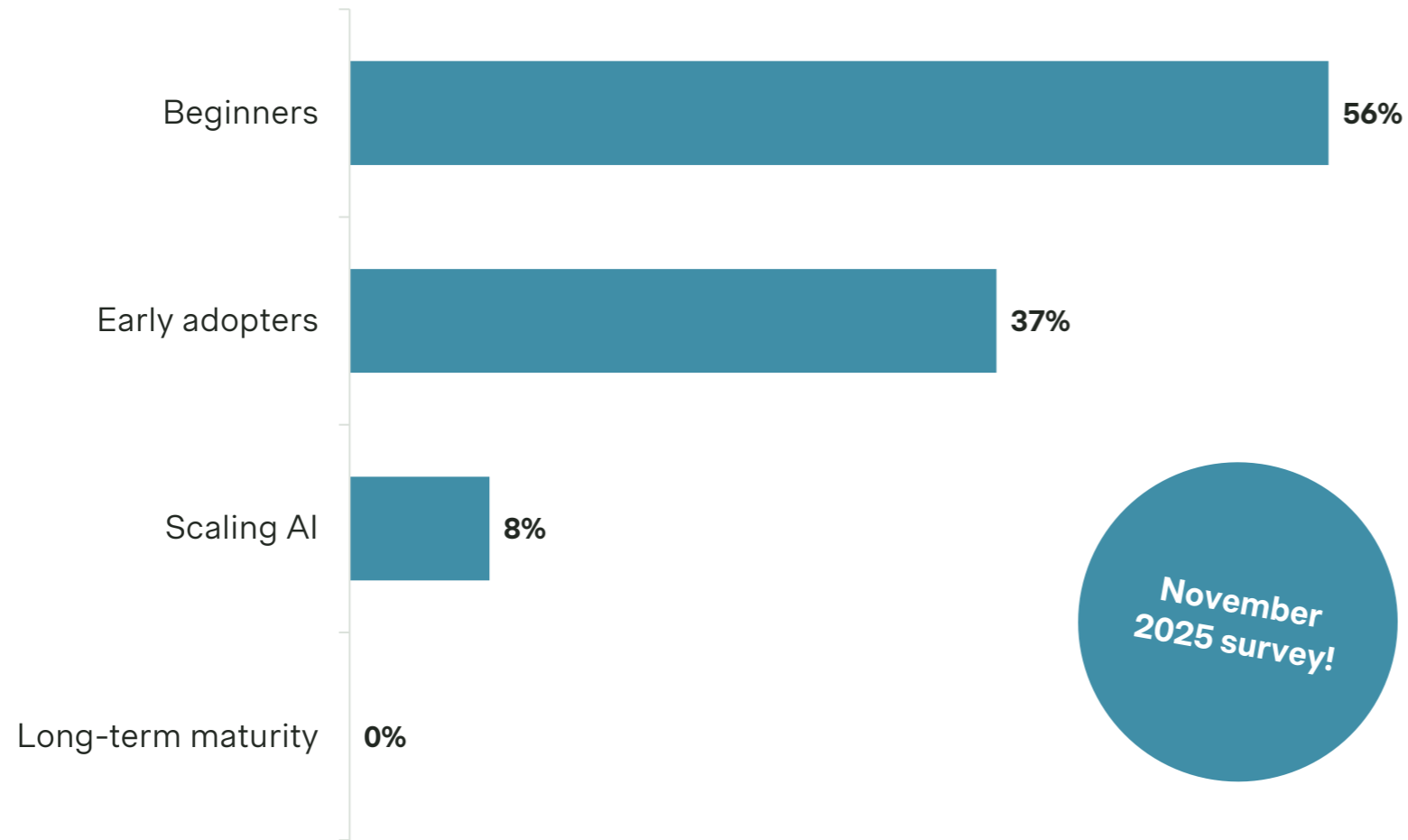
Sustainability & Responsible AI
energy efficiency, transparent governance

AI Governance & Ethics
regulation, compliance, and trust frameworks

Model Context Protocol
unified framework for seamless model interaction

AI survey results | **Most B2B industrial companies are still in the beginner stages of applying AI!**

AT WHICH STAGE IS YOUR ORGANIZATION ON ITS JOURNEY TO AI ADOPTION?



AI-supported lead generation | Unlock new customer segments quickly with AI supported hunting lists!

Project example

No need to wait!
AI solutions are here and ready to use today

Outcome:

Hunting List											
General		Service Line Fit					Ranking		Other		
Name	Region	Service Line A	Service Line B	Service Line C	Service Line D	Service Line E	Reasoning	Score	Rank	Status	Comment
Target A	Germany	4	1	6	0	2		3.6	6	Targeted	[...]
Target B	Germany	3	4	0	5	1					
Target C	Germany	2	5	0	6	6		4			
Target D	Germany	0	0	5	2	3		3			
Target E	Germany	4	4	3	1	4				Targeted	[...]
Target F	Germany	0	2	1	4	5		3		Targeted	[...]
Target G	Germany	3	5	4	0	2		3.6	5	Targeted	[...]
Target H	Germany	1	0	4	4	0		1.8	8	Targeted	[...]
-	-	-	-	-	-	-	-	-	-	-	-

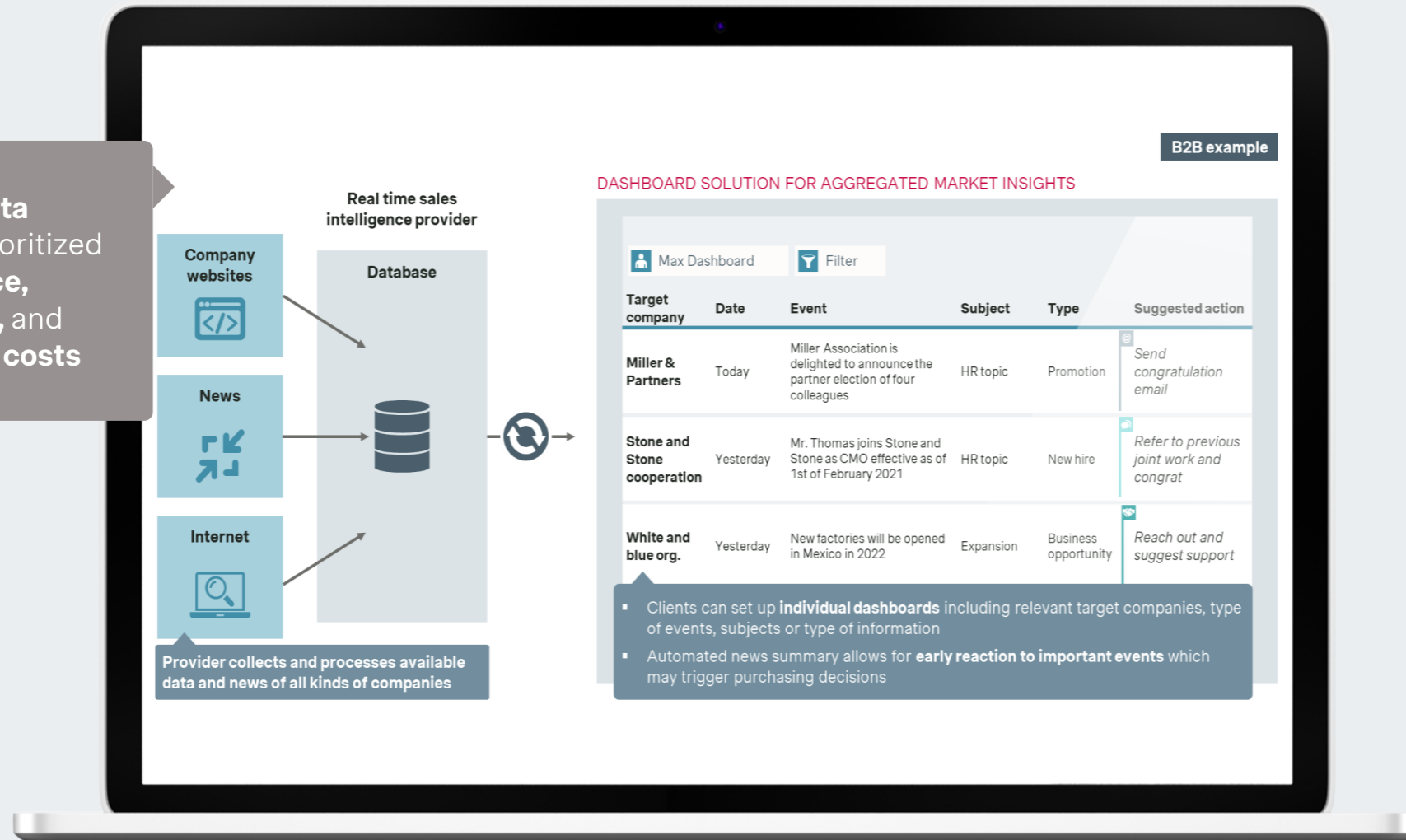
Automatically filter, qualify, and prioritize ~500 potential targets down to ~100 high-priority leads



AI-supported lead generation | Detect switching-prone clients via AI activity tracking

Illustrative

External data sources prioritized by **relevance, granularity, and acquisition costs**



WHAT TO DO:

- Define company activities to track switching indicators
 - Extract relevant data via web scraping
 - Develop AI model to detect switching intent
 - Cross-check companies with lead list and CRM
 - Provide sales with lead data and switching signals
- ➔ **Engage customers early with the help of AI-powered lead generation**

Data-driven cross-selling | **Unleash the cross-selling potential across various packaging categories!**

Revenue

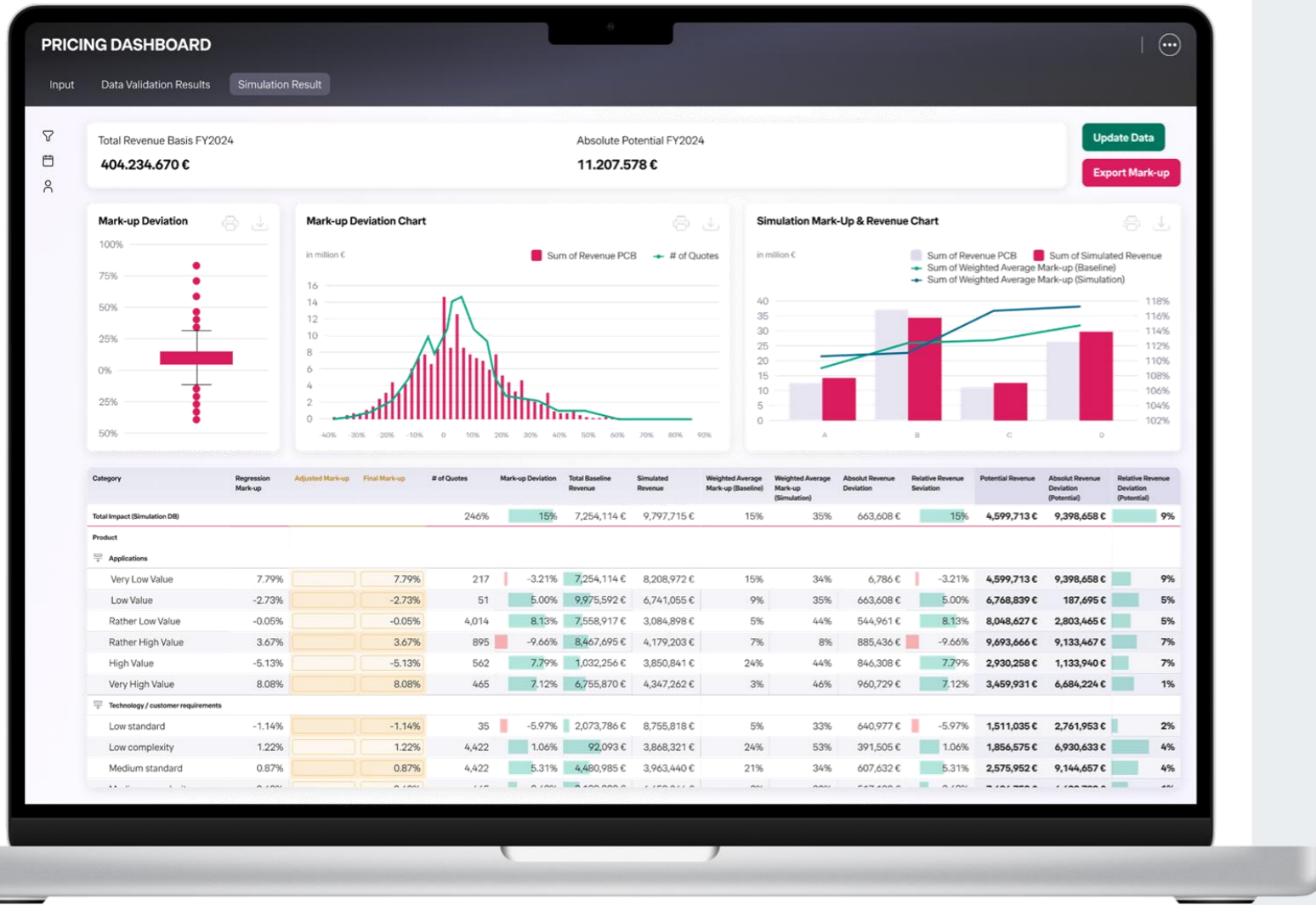


Use data-driven insights to drive targeted cross-selling and immediate revenue!

- ✓ Leverage data-driven insights to pinpoint **high-value cross-selling opportunities!**
- ✓ Recommend targeted cross-selling items **based on segment-specific, actual buying patterns**
- ✓ Drive impact through **focused KPIs** to convert **opportunities into immediate revenue**



Automate pricing and enforce discipline | 2026 is the year pricing goes digital and transparent — period!

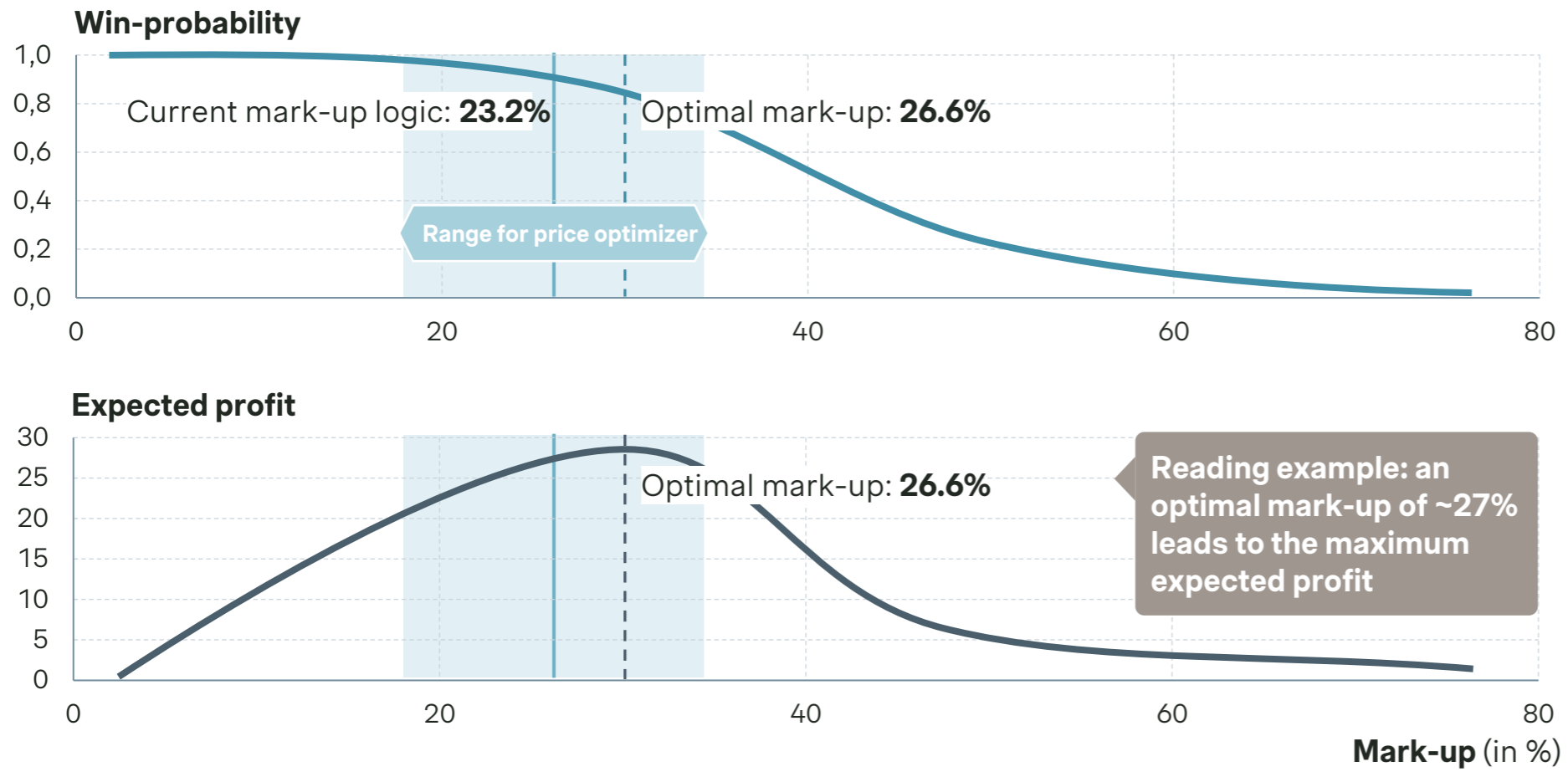


In 2026, digital and transparent pricing is non-negotiable. The advantages are clear:

- 1 Higher commercial performance
- 2 Stronger price realization & margin control
- 3 Improved transparency for sales
- 4 Operational efficiency & automation
- 5 Better data quality & analytics
- 6 Governance, compliance & auditability
- 7 Scalability & future-proofing

Automate pricing and enforce discipline | **The next step is dynamic pricing powered by AI-driven optimization!**

Illustrative



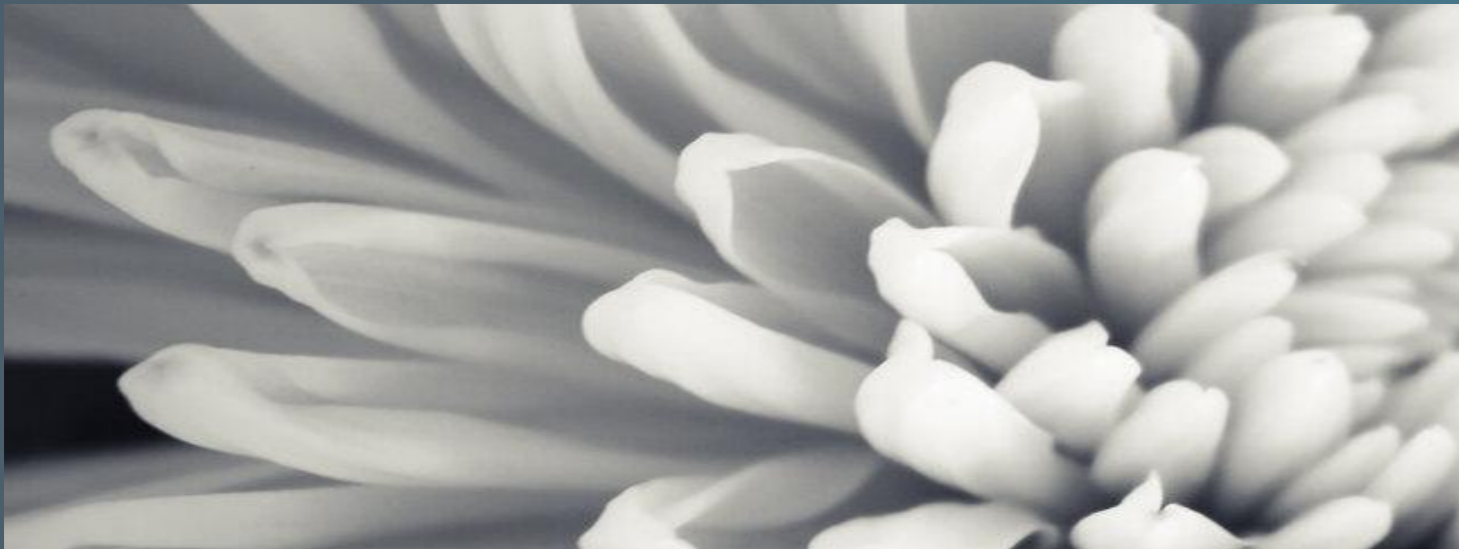
Implications!

- Include key KPIs like **hit rate** and **capacity utilization** dynamically
- Analyse situations fast with AI to **forecast Win-probabilities and expected profits**
- Act quick and precise on **deals which matter**
- **Win the right deals** more consistently



Your contact

At Simon-Kucher



Dr. Daniel Bornemann

Senior Partner,
Global Packaging
Practice and
Competence Center
Technology & Industrials

Zurich Office

Tel: +41 78 9733292
daniel.bornemann
@simon-kucher.com
www.simon-kucher.com