DELIVERABLE D.T1.1.2 "NATIONAL WORKSHOPS ON VALUE CHAIN MAPPING WITH STAKEHOLDERS"

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GENERAL INFORMATION – Internal Workshop

COUNTRY: Poland

Title of the workshop in English: Sustainable Packaging – Packaging Value Chain Mapping

Location: Busko Zdrój, Poland – ZERO WASTE Environmental Conference

Date: 14th September 2017

N° of participants : 72

SHORT DESCRIPTION OF THE WORKSHOP 1

The first workshop for entrepreneurs organized by COBRO (PP5) was held on 13-15.09.2017. The workshops were merged with the 5th Environmental "Zero Waste" Conference, which took place in Busko Zdrój. This conference is a staple in the calendar of events addressed to environmental and waste management companies and companies wishing to be pro-ecologically responsible (including packaging producers and packaging users). The theme of this year's conference was „zero waste", which is in line with with the direction of legal amendments and business needs, as well as consumer trends. The conference sessions were devoted to issues related to legal amendments in environmental regulations and business involvement in the development of the circular economy. Workshops for entrepreneurs "Sustainable packaging - packaging value chain mapping" were held on the second day of the conference. More than 70 people attended the event.

The session consisted of four presentations/parts:

1. Introductory presentation about BIOCOMPACK-CE project
2. General presentation about sustainability and circular economy and its implications for the packaging value chain by Greg Ganczewski from COBRO (PP5)
3. Presentation about sustainable packaging common misconceptions by Konrad Nowakowski from PIOIRO (PP6)
4. Value Chain Mapping workshop (introduction to value chain presentation and workshop and discussion)

During workshop, guests present were discussing the packaging value chain in details focusing on relative importance of value chain actors in packaging, taking into account sustainable packaging solutions such as bio-composites.

GENERAL INFORMATION – Workshop 2

COUNTRY: Poland

Title of the workshop in English: Packaging and Environment – Bio-composite Packaging in Circular Economy – Workshop

Location: COBRO HQ, Warsaw, Poland

Date: 24th April 2018

N° of participants : 61

SHORT DESCRIPTION OF THE WORKSHOP 2

The second workshop for stakeholders was organized on 24th April 2018 in COBRO HQ. The event was organized specifically for the value chain workshop and for the one-day national workshop on strategy development (Deliverable D.T1.2.2), which took place later.

The workshop consisted of the following presentations:

1. Introductory presentation about BIOCOMPACK-CE project
2. Requirements for the composite packaging including waste and hazardous waste by Konrad Nowakowski from PIOIRO (PP6)
3. Packaging labeling, including environmental labelling by Krzysztof Wójcik from COBRO (PP5)
4. General presentation about sustainability and circular economy and its implications for the packaging value chain by Greg Ganczewski from COBRO (PP5)
5. Value Chain Mapping workshop (introduction to value chain presentation and workshop and discussion)
6. Strategy for packaging value chain development (deliverable D.T1.2.2)

The workshop was attended by 61 stakeholders representing packaging producers, distributors, product producers, brand owners, supermarkets, waste management and higher education.

KEY FEEDBACK GATHERED FROM STAKEHOLDERS

Both workshop were attended by a varied group of small medium and large companies from the whole packaging value chain.
The purpose of the value chain mapping workshop was to draw packaging value chain, identify main actors and goods and services offered by value chain participants, and most notably pinpoint the critical actors and goods and services in paper-plastic value chain focusing on sustainable packaging solutions including bio-composites.

The following diagrams were generated and agreed upon during workshops:

Figure 1. General view of the packaging value chain

This diagram shows the general shape of the packaging value chain. The value chain consists of 8 main elements and the flow of the goods and services realized throughout the value chain is reflected in the joined lines (which often represent transport of the good or service from one element to next). The Support element is not connected as it can be relevant to all the elements. It is worth noting that during workshops it was discussed that packaging production and packing elements of the value chain are very often connected, hence the frame between them.

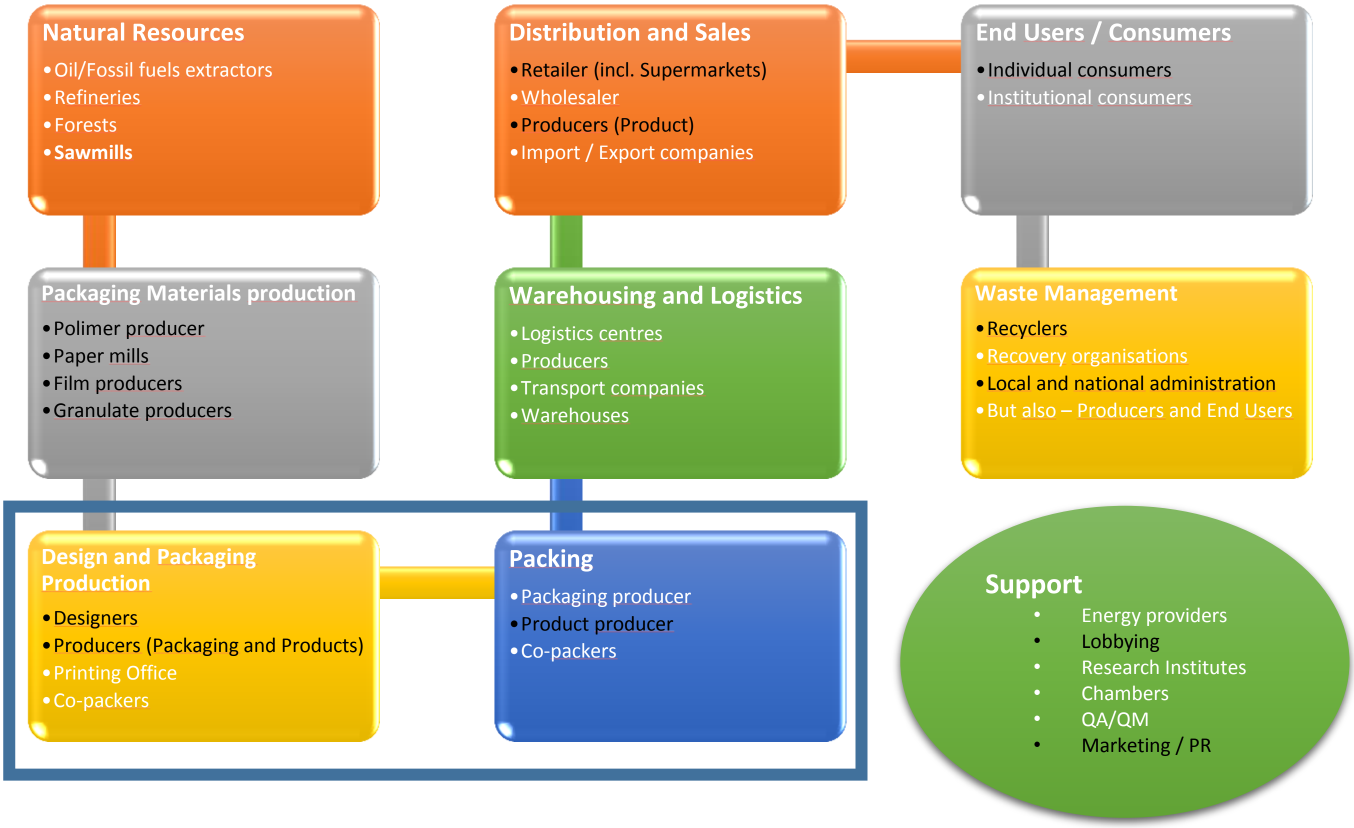

Figure 2. Main actors of the packaging value chain

The table above represents the main actors of the value chain – i.e. list of companies, entities and individuals necessary to fulfill the value chain of packaging. The actors which were especially important to the paper-plastics packaging value chain are indicated by black font. These include:

- Packaging material producers – they hold high power with regards to costs and availability of the materials, but are also connected to waste management (especially paper mills, which are often also recyclers).
- Designers – with growing popularity and need of eco-design they were considered to be especially important by majority of workshop participants.
- Producers – packaging producers often do not hold power and are not the decision makers in the value chain. In Poland majority of packaging producers are small and medium enterprises who only fulfill their clients (product producer) orders. They have to adapt and change according to market needs and not dictate them. On the other hand, product producers also stated that they are in fact only fulfilling the needs of their final customers which are located further in the value chain.
- Retailers (including supermarkets) – they were chosen to be important because of their bargaining power.

- Individual consumers – again – due to their bargaining power and final decision making, which of course can be shaped by marketing of the producers, but more often than not producers present on the workshops were using the pull strategy as their main sales strategy.
- Recyclers – deemed important especially by companies producing and using paper packaging.
- Local and national administration – they are making policy regarding waste, which is very important for all value chain participants, and can make or break a business.
- Lobbying – workshop participant portrayed lobbying groups as being very important for the value chain, they link them to policy, especially regarding plastics and waste management.
- Marketing/PR – external marketing and PR agencies were considered to be important to shape the public and industry view on sustainable packaging solutions.

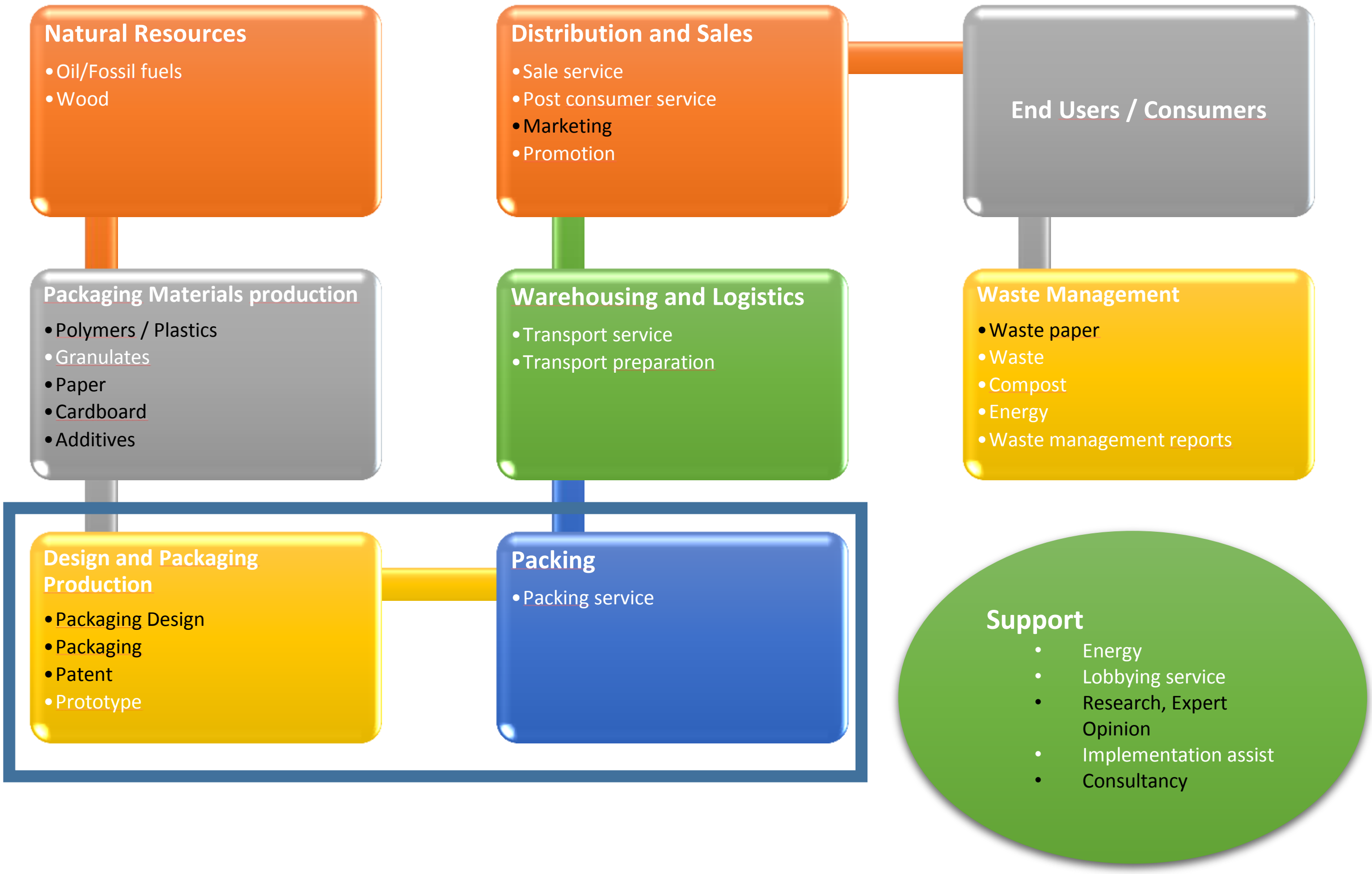

Figure 3. Main goods and services offered within the value chain

The table above represents the main goods and services of the packaging value chain. – i.e. list of primary secondary and support goods and services that are a part of the value chain. Goods and services which were discussed and selected as important to the paper-plastics packaging value chain are indicated by black font. These include:

- Packaging material production – these are the raw feedstock materials used to produce packaging, cost and delivery time is once again quoted most often as being the most important issue. Also important for the paper-plastic packaging value chain were additives (and their availability and cost) as they are used to tune properties of the packaging according to the product needs.
- Packaging design, packaging – some companies present on the workshop buy packaging designs from external designers, particularly when those designs reflect the eco-design philosophy. In other words, not many eco-designs are developed in-house.

- Patent – it sometimes happens that a packaging technology is patented. It is therefore up to the packaging or goods producers to license the patent.
- Marketing plan – similarly to the table above, the marketing plan for the goods packed in sustainable paper-plastic solutions is of paramount importance
- Waste paper – very important for paper-mills. They are of the view that paper material recycling (as opposed to organic recycling through composting) is the priority. They would like not to see 'good' paper go to biowaste.
- R&D and consultancy – workshop participants were very vocal about the need of such services, specifically when developing innovative and sustainable packaging solutions.

AREAS FOR IN-DEPTH ANALYSIS

Based on the value chain mapping workshops in Poland the following elements of the paper-plastic packaging value chain should be analyzed and taken into account in the BIOCOMPACK-CE project deliverables and outcomes:

- The issue of availability of biocomposite materials,
- The issue of costs of biocomposite materials,
- Additives necessary to design biocomposite packaging with good functional properties,
- Eco-design – facilitation, promotion and support,
- Recycling vs composting – arguments for both methods,
- Marketing – how to market and promote sustainable packaging,
- R&D, consultancy and support for all participants of packaging value chain.