

Tetra Pak

magazine ⁹⁹

Theme: Retailing



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Retailing is the last but one link in the supply chain. This is where the consumer, the end-user, determines which products should be purchased or left sitting on the shelves. This is where trends and analyses become reality.

The retail sector is today stronger than ever and sets the agenda for many issues, not least in terms of sustainability throughout the value chain for food. It is a tough and challenging environment to work in, but it offers great opportunities for anybody who sees solutions instead of problems.

At Tetra Pak we are working with our customers to provide preferred processing and packaging solutions for food. Our aim is to protect and make food safe in an environmentally responsible manner and that our solutions must be cost effective and of the quality demanded by manufacturers, retailers and consumers.



Niclas Bomgren/Tetra Pak

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From inefficient to efficient food distribution

The move from over-the-counter selling to self-service is by far the greatest innovation in retailing. In the 1950s a new, improved working and shopping environment was created for customers and staff and meant that a store could reduce its costs by half. Today there are other structural changes in progress.



The new face of the retail sector

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The food-retailing sector is faced with many challenges and opportunities. On the one hand it is affected by the world economy, cost variations, growing competition and the focus on sustainable issues. On the other hand, technological innovations offer new ways to conduct business, communicate with customers and share information with stakeholders throughout the value chain.

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The globalisation of the food industry has led to structural changes and complex market conditions, including the concentration and expansion of retail chains. The result has been increased competition and pressure on costs, a development which amongst other

things leads to integration between the various stages of the food supply chain. For consumers this means an unparalleled range of products, resulting in simplification and convenience, but also in some confusion.



Tetra Pak Brazil

The economic boom in developing countries will slowly shift the centre of gravity of the food and drink market, from the USA and Europe over to the rest of the world, such as Brazil, among others.

More consumers and a changing market order

By 2025 the world's population is expected to increase from 6.8 to 8 billion, and more will grow to be older. This, combined with migration to urban areas and rising prosperity, will influence how people choose to spend their money and how the retail food sector will evolve and change.

The food-retailing sector in high income countries is stagnating, while in developing regions such as Brazil, India, China, Southeast Asia, Eastern Europe and parts of Africa it is up-and-coming. Here, there is a growing middle class who are moving into the cities and who have more money to spend, resulting in an increased demand for food both locally and globally. This also affects the structure of the foodstuffs that are in

The ten biggest markets in the food-retailing sector, 2010 and 2014

2010		2014 Forecast	
Country	€ billion	Country	€ billion
1. USA	638	1. China	761
2. China	529	2. USA	745
3. Japan	345	3. India	448
4. India	279	4. Japan	360
5. France	205	5. Russia	322
6. Russia	186	6. Brazil	284
7. Brazil	185	7. France	228
8. UK	170	8. UK	198
9. Germany	160	9. Germany	168
10. Italy	130	10. Indonesia	167

Source: IGD (Marketing Portfolio Tools)





REWE Group

Several international food chains are well established in Russia's major cities, including among others the German REWE Group with its Billa Stores.

demand. The consumption of commodities such as rice and wheat is reduced in favour of dairy products, fruit, vegetables and fish.

The development in India and China will play a big role in the global economy, and the food industry must be prepared for a shift in the centre of gravity, from the USA and Europe over to the rest of the world. By 2014, IGD (*The Institute of Grocery Distribution*), predicts that China will take over the USA's role as the main food market.

Traditional food trade in India is still reserved for domestic traders and dominated by small businesses. Food chains have only five per cent of the huge food trade market.



©Jacob Silberberg/Panos



Buenos Aires

Terra Pak Argentina



Bangkok

Bloomberg via Getty Images

The large store format dominates the modern retail trade.

The retail store structure of the 21st century

Food sales have a diversified pattern and almost all types of retail outlets exist in virtually every country, from the hypermarket to the small market stall with personal service. Globally, the most successful concept is the modern self-service food store. A large proportion is hypermarkets – in many developed countries more than 50 per cent – and this is where competition is greatest. The number of *hypermarkets* and *supermarkets* in developing countries is increasing in proportion to the growing strength of the individual countries'

economies. However, the most widespread store concept is the small format – *convenience stores*, speciality shops with a selection of products, kiosks, open markets, etc. People need the convenience and closeness that these stores and small outlets offer. In developing countries, they are an extremely important marketing channel, and will be in the future as well, for reaching new consumers with safe and packaged foods amongst other things. The fastest growing concept is the *discount store* that has made great territorial advances, in particular in Europe.

Retail ranking 2010 – Modern grocery distribution

Banner sales: the sum of the sales of all outlets under a company's banner. Source: PlanetRetail (Marketing Portfolio Tools)

GLOBALLY:			REGIONALLY:			
Company	Country of origin	Banner Sales USD mn	North America	Banner Sales USD mn	Europe	Banner Sales USD mn
Wal-Mart	USA	426 060	Wal-Mart	337 690	Carrefour	114 810
Carrefour	France	152 343	Kroger	82 531	Schwarz Group	82 269
Metro Group	Germany	104 216	Costco	72 258	Tesco	78 985
Tesco	UK	97 539	Target	66 733	Rewe Group	68 463
AEON	Japan	92 829	Sears	66 577	Metro Group	65 576
Schwarz Group	Germany	86 269	Walgreens	63 768	Auchan	64 717
Seven & I	Japan	86 193	CVS	56 104	Edeka	60 175
Kroger	USA	80 723	Safeway (USA)	45 573	Aldi	58 987
Rewe Group	Germany	79 977	SuperValu	39 418	Leclerc	49 335
Costco	USA	79 123	Rite Aid	26 077	Intermarché	43 277



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Wal-Mart is the world's largest retail chain and in terms of turnover is the world's largest company. This is despite its limited steps outside its domestic market, the USA.

Carrefour is the most international company among the major food retail chains.

Tesco is a very strong innovator.

Aldi laid the foundation for the low-price market for food, and **Lidl** is rapidly expanding throughout Europe.

7-Eleven is the world's largest convenience store chain.



With easy access, ample parking, a large and diverse product range and long opening hours, these giant stores often become a destination for an outing by the whole family. (Japan) www.walmartstores.com

Asia Pacific	Banner Sales USD mn	Latin America	Banner Sales USD mn	Africa & Middle East	Banner Sales USD mn
AEON	76 255	Wal-Mart	41 067	Shoprite	7 254
Seven & I	62 424	Carrefour	19 066	Pick n Pay	6 352
Woolworths (AUS)	42 285	Casino	16 482	Carrefour	4 255
Coles Group	28 930	Cencosud	9 531	Casino	3 887
Uny	21 540	Soriana	7 136	SPAR (S.Africa)	3 861
LAWSON	19 651	SHV Makro	4 870	Massmart	3 665
FamilyMart	19 142	OXXO	4 021	Shufersal	3 238
Tesco	15 198	Comercial Mexicana	3 238	Metcash (RSA)	2 730
Wal-Mart	15 074	Chedraui	3 097	Emke Group	2 433
Metcash (AUS)	14 065	Lojas Americanas	2 731	Panda	2 110



METRO AG

Metro Cash & Carry, India.

Low price attack

Discount stores have for years been the fastest growing area in the retail sector, in particular in Europe and North America. Fundamentally the concept is based on a reduced range of products compared to traditional food chains, minimal shop-fittings, less staff and support services, as well as a large proportion of own product brands that give greater margins. This establishment has forced other food chains into strategic changes, and they are now competing with the discount stores' own recipe, not least in the case of own label products. Most consumers shop from time to time in discount stores, and so they are considered to have become a reference point for the standard price for many products. The rapid growth is expected to slow slightly in mature markets

"One size does not fit all..." Retailers will have to offer store concepts that appeal to various consumer mindsets.



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Competition from national superstores may cause global food chains to think twice before entering a new market in a developing country. (Jakarta, Indonesia)

in Europe, but new stores will open in many other countries. The rationalisation, computerisation and the cost savings that the discount chains have led the way in will shape the whole food supply chain for the foreseeable future.

Continued expansion but selective establishment

The share price of many leading food chains is, to a large extent, influenced by their growth expectations. Competition makes it more difficult to meet expectations simply by growing in the domestic market. In order to evolve, survive and thrive, they simply have to find new markets and new store concepts. But many retail chains have discovered that new markets abroad do not always have the right conditions, so they are therefore more selective with their plans for new establishments. However, the leading chains will continue to grow abroad while holding positions in their important domestic markets. It becomes increasingly important for

producers, suppliers and retail distributors to monitor the development of retail channels in their markets and take advantage of the trends driving growth locally, regionally and globally.



Conclusion:

- ➔ Modern retailers "fragmented" but big ones drive the global agenda
- ➔ Medium size retailers growing faster than top ones
- ➔ European retailers more relevant in grocery
- ➔ Europe is the toughest, most concentrated market
- ➔ European retailers set the agenda for many issues in the retail food sector
- ➔ Developing countries are increasing their importance
- ➔ Large store format dominates the modern retail sector
- ➔ Traditional trade will not disappear



Rick Friedman/Corbis/Alamy

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One more step in the processing chain

The food-retailing sector's concept will be broadened to include products with values that consumers apply in relation to time saving, convenience and money. A store cannot just sell products that the customer is expected to want, or have the skills or time to cook, but it has to go one step further. Cheap offerings such as prepared meal ingredients and ready-cooked meals to take home or eat in the store are leading the sector into a new industry where it is competing directly with restaurants and the fast food sector.

More technologies and less staff

It is almost essential to use innovative technologies to reduce costs, develop and implement new ideas and drive sales in the store. Technically advanced and integrated checkout, inventory and logistics systems are more the rule than the exception. Automatic ordering of goods, electronic invoices and shelf labels reduce the costs and time otherwise spent on performing such operations manually. Powerful electronic marketplaces on the Internet have existed for some years now which facilitate the trade in goods be-



Brooks Kraft/Corbis/Scampix



C. Howes/Wild Places Photography/Alamy/LuckyLook

The new retail sector sets demands on adaptability and flexibility in both people and companies.

tween retailers and suppliers (B2B). Here the suppliers can put their goods on offer and the retailers can place their orders.

A shopper can notice the new technology through the online checkout terminals, digital signage, computerised weighing, self-scanning, self checkouts, store cards that automatically give personalised discounts when paying and much more. Touch screen terminals are becoming more common as an alternative for store personnel, and with their wide areas of application they can improve the service on the sales floor while at the same time customers can buy more independently. The terminals are changing the economic picture radically for a store by means of enabling more staff to higher priority customer service events and lower their reliance on floor staff.

Internet and mobile phones are playing an increasing role in many food-retailing chains in terms of providing information about the company, products, services, offers, etc. However, online shopping for food is still in its infancy and needs the support of well-established stores to build credibility among consumers.

Global yearly growth of sales channels for daily consumer goods, 2010-2011.



Source: PlanetRetail (Marketing Portfolio Tools)





In the mind and of the consumer

The most successful retailers are those who understand and meet their customers' needs and preferences.

The retail sector needs to constantly analyse its relationship with its customers, which requires knowledge and a degree of flexibility. It is important to understand how consumers think and act and be alert to the constant changes. What consumers buy, where and why, what additional value is sought in the products, what price they are willing to pay, what factors are valued more than the choice of store, and how they perceive the different store concepts. 🌱

Of course, there are substantial differences geographically, within different groups and within different generations. It is clear though that most people are looking for more healthy foods and customised products, of high quality and at the lowest price, in a well-stocked and exciting shopping environment. People also shop around for special products and constantly re-evaluate their loyalty to stores and brands.



Milk is a category, where shoppers are guided by their desire to find their product. They have already decided what product and quantity they want before they leave home and offers and exposure have rarely much effect.

Category governs shoppers

We are all consumers – of food, money, media, travel, etc., but we are different types of customers or shoppers. We have different needs and preferences, we prefer certain categories or dislike others. Our commitment as customers in a product category does not mean that we belong to a particular consumer type.

Since every individual has their own opinion about the importance of every product category, the food-retailing sector must be aware of which purchases are planned at brand level and at retail level, and which purchases are not planned at all. Most decisions taken outside the store are brand-driven – people have purchased a product of a particular brand before or just like this brand, and automatically look for the same product the next time. The decisions taken in the store are often based on added value, packaging or product exposure.

Milk, in all cases the daily standard milk, is a typical low-price category, where shop-

pers are guided by their desire to find their product. The majority (80-90%) have already decided what product and quantity they should have before they leave home. Offers, multipacks and other exposure have marginal effect. For JNSD (juice, nectar and still drinks) it is a little bit different. Although most shoppers have usually decided what to buy before entering the store, they expect a bit more from the range. Special offers and new products have a greater effect here. Accordingly, variation and differentiation do not apply in general, but much depends on the product category in question. In both the case of milk and juice a third of shoppers spend less than 12 seconds at the shelf.

Focus on price and value

In the first stage of the recession, many chose to shop more often in discount stores. Purchasing also changed in general to the benefit of low-price alternatives. Although many later returned to their regular product choices, people have continued to compare



People are contradictory. They shop around for special products and re-evaluate their loyalty to stores and brands, but they also want to be loyal to their favourite store and reluctantly change their favourite products in favour of something new.



Niclas Bomgren/Tetra Pak

quality and price to a very large extent. The hunt for special offers is now one of the biggest growth areas in the food-retailing sector. It is often about low price, high quality, a bonus such as "buy this one and get this one free" or multipacks of for instance ambient juice and soft drinks.

In markets with low growth or where the retailer does not want to compete with price, the product offerings are linked to consumer ideas about what creates value and meaning. Many successful product brands are carriers of a story or a feeling that appeals to consumers and makes them choose that particular product. The packaging can also be included in the value as an element of how a brand and a product are perceived.

In many developing countries, milk in aseptic packaging is heavily-displayed on the shop floor and people usually buy large volumes at a time, as this milk needs no home refrigeration. A convenient box with a handle contains 16 x 250ml Tetra Fino Aseptic packages. (China)



Tetra Pak - China



Ariel Skelley / Getty Images

Consumers will always place great value on a warm welcome and the design of the store.

How does the shopper choose a store?

A pleasant store layout, staff attitude, a store concept with clear values and generous opening hours affect consumer attitudes to the store, the company and its brands. But in most studies it appears that location, price and range are the most common factors in the choice of store. The price is often said to be the most crucial – a price that is perceived wrong creates dissatisfaction – but even if shoppers consider the price to be right, it seldom makes them fully satisfied on its own. The range is also one important reason why people are loyal to their favourite store. More often than not the two factors have an equivalent value in many stores, and then the geographic location will be the decisive factor. People simply choose to make the closest buying point their favourite store, even if a competing store is only a short distance away.



Niclas Bongren/Tetra Pak



Retailers compete with messages that signal *Come to me – I am the best, you can trust me.*

Experiences and services for restless consumers

Price, quality and range are good inducements, but with an abundance of offers and shopping locations the individual store has to go further in order to entice consumers and get them to fill their shopping trolleys with even more products. An increased restlessness means that many consumers shop around, find new products and make impulse purchases to a greater extent. In which case



Tetra Pak Arabia

Campaigns enter the Retailers

“Drink Milk! You’ll be Great”

White milk consumption in Poland is much lower than the European average. Milk is mainly drunk by children and young people between 9 and 16. To change the image of milk and current consumption trends, Tetra Pak Poland has participated in the widely recognized social campaign “Drink Milk! You’ll be Great”, originally inspired by the American version “Got Milk”.

In 2009 the campaign moved to the place where shoppers take the actual decision about products they buy – inside the store. International retailers Auchan, Tesco and real, - partnered Tetra Pak Poland and the main challenge was to show that white milk could be consumed on different occasions and in different ways.

Tetra Pak involved famous bartenders, who demonstrated their art by preparing different milk cocktails and smoothies. Shoppers were able to enjoy the cocktails, while getting information on the values and benefits of milk. These events were very much appreciated by both consumers and retailers, and one of the retail chains noticed an increase of 32 per cent in milk sales compared to the previous year when there was no campaign.

Store strategies that attract us

A retail food store must follow the development of society and constantly change and improve according to the different needs of consumers.

it is important to surprise people and offer shopping experiences – to have campaigns, events and happenings, just when the customer's needs arise, to stimulate the senses with sights, smells and sounds, or invest in interactive technology in order to facilitate the purchasing process. We can also see how traditional supermarkets are expanded into service centres that use services from other industries to attract, such as child care, pharmacy, post office services, cash machines, etc.

“A Taste for Nature”

This is a joint campaign devised and run in the same way as the milk campaign, but in the juice, nectar and still drinks category. In co-operation with *real*, - Poland, one of the leading supermarket chains in the country, Tetra Pak organized a pilot programme to promote the sales and consumption of juices packed in cartons.

The campaign has capitalized on the visibility and popularity of the milk category



Tetra Pak Poland



Tetra Pak Poland

Polish customers were enticed into the supermarkets by famous bartenders who made interesting milk and juice drinks. Shoppers were able to enjoy these cocktails, while getting information on the values and benefits of milk and juice.

support programme run jointly in several supermarkets chains. This time, in support of the juice category, consumers were able to taste the imaginative concoctions of juice- and nectar-based cocktails, created by some of the country's top drinks mixers. In addition to the shows, a sales promotion competition was organized for customers, with tempting prizes such as luxury picnic hampers.

Both top-selling juice brands and retail brand *real*, -*QUALITY* juices and nectars were displayed, together with UHT milks from various producers. The common factor for both categories was liquid food carton packaging, with Tetra Pak's motto "Protects what's good", which thereby got excellent exposure all over the country.

The shop of the future is already here *real*, - *Future Store*

An example of a future retail store is located in Tönisvorst, Germany, where the METRO GROUP* *Future Store Initiative* is setting new technological standards for the food-retailing sector. On a sales area of approximately 8,600 square metres the retail chain is testing new concepts and new technologies that will give consumers even more convenient, exciting and informative shopping experiences.

Future Store is a modern design with many innovative ideas and cutting-edge technology that makes buying simple, convenient and rational. One example is *The Mobile Shopping Assistant (MSA)*, a software application for compatible mobile phones which, combined

*METRO GROUP is a comprehensive retail and wholesale group based in Düsseldorf, Germany. Even though the domestic market is the largest, METRO GROUP is one of the largest and most international retailing companies worldwide.

with new purchasing ideas, has been tested and developed in the store. When customers come to the store, they can either rent such a phone or download and run the software using their own mobile phone. MSA is connected to the store's stock and checkout system and always displays updated product prices. The software also contains a search function so that you can find the right product in the store. With the integrated camera you scan your goods and get a continuous overview of the total purchase cost. The MSA helps customers to quickly and easily pay and pass through the checkouts. Shopping lists can also be prepared at home on a PC and transferred via a secure link to *The Mobile Shopping Assistant*.

To make shopping pleasant and the store worth a second visit, customers are offered different experiences. You can try food dishes at a sampling counter, which are made from new or exciting ingredients, prepared by the staff in the store's kitchen. You can also take a break in the coffee bar right in the middle of the store. In the wine department wines are stored in a cabinet at just the right tem-

With a store-integrated application in their mobile phone, customers can themselves scan the products.



Speedpix/Alamy/LuckyLook



perature, ensuring a consistently high product quality; other departments are highlighted by atmospheric sounds and smells. If customers want, they can make contact with the mobile robots that show the way to the various new items in the store.

The *real,- Future Store* is a unique platform for innovation and development in the retail sector. For more information or a guided tour, please visit: fuehrungen-fs@future-store.org

Upon request, the innovation guide "Ally" assists customers in finding all the exciting innovations and new technologies available in the German *real,- Future Store*.



METRO AG



Retail brands show off more shelf space

Retailers worldwide are placing more emphasis on marketing their own brand products and matching them with consumer values and lifestyles.



For many years major retail chains have fought hard to build their own label products, which give them higher margins and increased sales volumes, resulting in good profitability. When they introduced their brands in several categories and with distinct values, it changed consumer attitudes positively and has allowed many retail brands to gain a substantial foothold with customers. Today retailers' branded products compete successfully with manufacturer brands, while

at the same time they can also be produced by the manufacturers. The impact is greatest in Europe, where many of the major operators are located, but the rate of growth is also increasing in the USA and Australia. In the rest of the world the retail-owned brands are relatively limited – consumer knowledge of them is low and there is an ingrained preference for the well-known manufacturer brands.

With own brand products, the retail chain has a direct responsibility to the consumer, with the chain's reputation at stake.



Retail branded products can be divided into three categories:

1. Brands that are named after the retail chain.
2. Brands that have no name affiliation with the chain (Aldi), but are still own label products.
3. Generic brands that have no brand and are just named as for example milk.

Development and breadth

Originally retail brands were associated with cheap copies of producer-owned brands, but they have now expanded well beyond the focus on low prices. Own label products in food retail have equivalent quality and are available in different segments and price ranges, for example, premium, medium, low price and the green category. They have been allocated more shelf space in the stores and in some categories they are as common as producer-owned brands. In Switzerland and the UK, where this trend has gone on the longest, 30-40 per cent of the stores' products are own label products. This development is putting pressure on the well-known brand manufacturers to entice consumers back to their old favourites, leading to a creativity that drives the whole food market forward.



Not many have succeeded like Tesco in the UK in making its own brand as strong as Coca-Cola and Kellogg's in the eyes of most British people. Tesco's brand strategy is based on a system with several categories and quality scales, for example: *Tesco Value*, *Tesco*, *Sun Grown* (discount brand), *Light choices*, *Organic*, *Free From* and *Finest*.

The high percentage of own label products in Europe is also linked to the strength of the discount trade.

Industry motives

The food-retailing chains' primary motive for own label products is the higher margins, as this eliminates costly intermediaries, sales forces and marketing. They can take an active part in the development of products and offerings, thereby building their image and creating customer loyalty both to the retail brands and to the stores.

Retail brands have several advantages for the industry:

- greater freedom and flexibility in pricing
- greater control of product attributes and quality
- higher margins and higher profits
- no cost for the producer's marketing

Implications and opportunities for branded suppliers

In mature markets retail branded products constitute a strong competitive threat to the producer and supplier-owned brands, which now have to live side-by-side with them on the shelf. The major food retail chains are rationalising the product range to give more shelf space to their own label products, but also to focus on the producer-owned brands they have chosen to keep. The restriction in the range of brands makes it difficult for lesser-known suppliers to assert themselves, so in the long run only the strongest brands will survive – the ones that stand for clear and distinct values, both physical and emotional. The strongest, the so-called *superbrands*, have a unique advantage in that the brand itself inspires consumers with a "feel-good" feeling and they will of course maintain their

Retailers want to create relationships between their brands and their customers.



.....
The store becomes its own brand and is not just a marketplace for other brands.
.....

universal presence in many markets. Less successful brand owners will take on the role of contract manufacturers for the retail branded products and find viable business models there. In between are those who will utilise co-branding and offer their know-how.

Greater choice increases customer loyalty

Amongst other things, consumers choose retailer brands to save money, make smart choices and because they consider some well-known brands to be over-hyped. In general it is felt that retail brands have the same quality as the well-known supplier brands. Loyal customers often feel secure when their store chain's name or logo is on the packaging, and trust that the product fulfils the store's quality standards in general. Another customer benefit of retail branded products is that you can buy cheaper quality foods without having to wait for promotional campaigns and special offers.

On the other hand, consumers expect their store to have a wide range of products, where the well-known and often much-loved producer brands are also available. The presence of strong producer brands increases the opportunities for the customers to find affordable products and to make the right product choices.



Tetra Pak Philippines

A store with a range of different branded products and great freedom of choice, increases customer loyalty and the willingness to return. (Modern Supermarket in the Philippines)



Many consumers are attracted to own label products because they are usually cheaper and are now considered to have the same quality as the well-known producer-owned brands.



John Lander/Oriental.com

Despite the expansion of supermarkets, small scale business has a strong foothold in Southeast Asia. People in general buy their daily necessities at open markets and in the small corner shops available on almost every street corner.

Small sales area, big on service

Despite globalisation and many similarities, each food market is unique. It is heavily characterised by its culture and its consumers, by the economic standard and by laws and regulations.



Lawrence Grodeska, www.noveltimes.com

Megastores, digitisation and the rational large-scale distribution of products are growing, but they are not replacing the traditional methods of selling food. Almost wherever you are in the world, all store types coexist side by side; but what is different is the allocation between traditional and modern retail sectors.

Open markets

The traditional retail food sector, that is mainly small businesses, has a strong foothold in many places, in particular in South-east Asia and in many developing countries. In town squares and market places there is a lively trade in every conceivable food product and beverage. Personal service, fresh products and social interaction are attractive to consumers. Open markets will

remain the sales channel of mainly fruit and vegetables, as long as consumers believe that they get better quality there. And since people do not generally shop on a large scale but just buy what is necessary from day to day, closeness to the markets is a great advantage.

Neighbourhood stores

Traditional trade also includes small neighbourhood stores with a very limited product range. They are ubiquitous everywhere and especially in most Asian countries. This type of store is frequented by millions of people for daily purchases of items that they need for home use but would not choose to go to the grocery store or supermarket since it is only one or two items.



T.M.O. Buildings/Alamy/LuckyLook

Great Britain



P-E Forberg/Prague/Alamy/LuckyLook

Czech Republic



@PlanetRetail Ltd-www.planetretail.net

Spain

Urban small shops that sell food and drink are all over the world. They are modern, traditional and have many different profiles, but their common business concept is built on convenience, service, a limited product range and generous opening hours.

In other countries, neighbourhood grocery stores have a lot in common with the supermarket, but are smaller in both the surface area and the range of products. Due to the relatively small size, customers can get in and out conveniently, or have purchases delivered. In some places they are known as night shops and they often compete with other convenience stores. Urban stores are everywhere and in many variations with different national names. The common denominator for them is a business concept based on precision, with offers tailored for the target group and a product range that can change from day to day, plus convenience, service and generous opening hours.

Complementary stores

Although global food chains are expanding in emerging countries, and a growing number of people choose these modern self-service stores with a wide range of safe, hygienic products with consistent quality, traditional food trade will survive. In large cities, the small food retailer is in demand as a complement to the impersonal and often more remotely located giant format self-service stores. In developing countries, the traditional trade is an extremely important marketing channel for producers and suppliers looking to reach new consumers with modern packaged food products, such as long-life dairy and juice products.



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Netherlands



PCU/Alamy/LuckyLook

Italy

Bloomberg via Getty Images



USA



Sara Melvert

Denmark



Sara Melvert

France

The high population density in many large cities is a great base for small business owners. Their limited product range almost always includes drinks, snacks and other simple fast food.



Tetra Pak Thailand

Thailand



Tetra Pak Vietnam

Vietnam

Traditional trade is still relevant in many countries (2009).

(Source: Nielsen / Tetra Pak)

	Population in millions, approx.	Number of outlets, approx.	Revenue share %
Egypt	80		
Traditional trade		281 270	100
Modern retail		370	1
Pakistan	184		
Traditional trade		656 720	90
Modern retail		6 280	10
EastMed*	45		
Traditional trade		137 190	79
Modern retail		1 510	21
Argentina	41		
Traditional trade		254 000	67
Modern retail		2 300	33
Arabia	61		
Traditional trade		70 220	57
Modern retail		9 200	43
Poland	38		
Traditional trade		95 440	55
Modern retail		4 480	45
Mexico	112		
Traditional trade		323 000	50
Modern retail		2 420	50
China	1330		
Traditional trade		2 139 750	46
Modern retail		99 240	54
Thailand	67		
Traditional trade**		310 580	43
Modern retail		20 500	57
Turkey	77		
Traditional trade		151 500	40
Modern retail		11 340	60

* Cyprus, Syria, Lebanon, Palestine, Israel, and Jordan

** Only liquid food



Tetra Pak Philippines

Philippines



Tetra Pak North Andina

Colombia



Traditional trade in developing countries is an important marketing channel for suppliers looking to reach new customers with modern packaged foods.



United Arab Emirates



Mexico



Egypt



China



Ghana

The strength of small outlets is personal service and their function as social meeting places.

The route to the goal – and the purpose of packaging

Well-functioning food distribution is essential for our daily lives. Packaging is a prerequisite for products to maintain their original quality and to be sold in the stores.

Packaging is one of the cornerstones in the logistics between supplier, producer, retailer and consumer. Food packaging and its contents must cope with a difficult and perhaps long route from producer to consumer, while at the same time maintaining quality and with no product waste. This is not entirely without complications because the products are handled many times along the way and external stresses can be significant. Transport packaging and/or secondary packaging is often necessary to protect the products from damage and any other outside influences during the journey.



Roif Viberg

Packaging also plays a significant role in commerce. In addition to protecting and maintaining its contents, it also has to sell the product, to be a bearer of the brand name, to provide information to consumers and to simplify the work in the store. In addition, it must be functional, cost-effective and resource-efficient from an environmental perspective.

From the delivery truck directly onto the shelf

Requirements to reduce resources and protect the environment have led to more frequent use and re-use of secondary packaging inside the store. So the role of secondary packaging is to protect, transport, market and sell the product – all at once. The aim is also to reduce the handling of products between production and the store's shelves.

The concept is called *Shelf Ready Packaging* (SRP) or *Retail Ready Packaging* (RRP) and it has been around for many years. Secondary packaging can be shelf-ready, display-ready, or infrastructure-based, and include crates, trays, plastic film, pallets, display stands, etc. It should be possible to take Retail Ready Packaging directly from the delivery truck into the store. This reduces the work



学生饮用

成长





Tetra Pak Brazil

Reducing packaging is counter-productive if product wastage increases instead and then exceeds the savings made by the initial reduction.

and the costs involved in shelf-filling and improves the availability of products in the store. The concept has been instrumental in the development of the discount chains and their investments, sales, operating costs and margins.

Optimise but also reduce the use

In the beginning when secondary packaging was adapted for store shelving, the focus was on rapid identification, easy opening procedure and smooth shelf-filling. Empty outer packaging was often left on the shelves and could give consumers the impression that the packaging was unnecessary. A look at the solutions in use today reveals that much more effort is dedicated to the handling and disposal of empty trays, cartons, etc. and on

balancing the costs and changes based on the whole business concept.

In the midst of fierce competition, secondary packaging must help to sell the product and be eye-catching and attractive. With their help a large number of consumer packages can be made available in a way that captures the consumer's eye. Within the industry there is a strong desire to optimise but also reduce the use of secondary packaging and many leading store chains have made concrete commitments, for instance Wal-Mart, Tesco, Aldi, Carrefour, Asda, amongst others. Most of all cardboard and plastic film in secondary packaging for food is recycled in a closed loop system which is managed by the stores themselves.

Availability on the shelf is key

While striving to reduce packaging use in general, the food-retailing sector is in agreement that secondary packaging for food products is necessary, in particular during transportation, but also in the stores. The whole concept of the discount chains is of course based on secondary packaging dominating the interior of the store. But in many markets, for example in Sweden, the large food-retailing chains prefer to have individual consumer packaging on the shelf because it results in a more pleasing store display. Consumers prefer this way, and the reasoning is that more is sold if the packaging forms an attractive front on the shelves.

To improve shelf-filling and with it the availability of the products is the key issue, with or without secondary packaging. Repeated surveys have shown that customer loyalty to stores and brands is undermined

over time if they are continually faced by empty trays or shelves. So it will become increasingly important for retailers, and hence suppliers, to avoid running out of products and leaving gaps on the shelf or on the floor.

Easy to grasp, carry and load! A large part of a store's costs lies in handling products – getting them into the storage area and from there out onto the shelves.



Getty images

Just as with primary packaging, secondary packaging is a communication channel, a brand messenger, an ergonomic tool, a packing unit and an environmental improver.



Tetra Pak Brazil



RFID might take goods logistics to a new level by means of radio waves being able to track goods throughout the supply chain.



Identification and traceability

Packaging has an important role to play in each stage of the supply chain as an information carrier. Primary packaging, secondary packaging or tertiary packaging, they are all carriers of information in different ways. Apart from identifying the product, information in the form of article numbers, bar codes and plain text can also be used for traceability and origin labelling. The bar code on the outer packaging is a means of logistical efficiency throughout the distribution chain. Bar codes on consumer packaging are designed to be registered at the store's checkout and provide information on product and price, but they also provide the data for payment and sales statistics.

RFID (Radio Frequency Identification) is a complement to the existing bar code based system GS1 (formerly EAN). It might take goods logistics to a new level by means of radio

waves being able to automatically track goods throughout the supply chain and indicate their geographic location. The information from individually marked goods loaded on pallets can be read automatically, without the reader having visible contact with each item.

Improving profitability all the way

The ability to generate profit has become a major challenge. Increased co-operation within the supply chain is one solution, and industry stakeholders are integrating their activities with each other to an increasing extent. ECR (*Efficient Consumer Response*) is a concept where companies work together to combine their activities in the flow of goods and information. The aim is to remove unnecessary costs in the chain from producers, suppliers and retailers in order to be able to meet consumer requirements better, faster and at a lower cost.



Every retailer wants to minimise food product waste in the form of theft, expired best-before-date and damaged products. Long-life liquid food products in robust carton packages reduce the risk of the last two. In addition they save energy, because these packages do not need refrigerated distribution or cold storage.

“A package should save more than it costs”.

(The founder of Tetra Pak, Dr Ruben Rausing, in the 1930s.)

The individual company can save resources by developing LEAN systems. *Lean Production* is a production and business philosophy whose ultimate goal is to create a perfect value for the customer by means of a perfect value creation process without wasting resources. It can be applied in every business and in every process. It is not a strategy or cost-reduction programme, but a way of thinking and acting. LEAN can be coordinated with environmental work at the company as both have the same objective – to reduce the waste of resources. The term "Lean" was coined to describe the Japanese company Toyota's operation in the 1980s.

At Tetra Pak we strive to provide our customers with packaging solutions that will improve efficiency and costs throughout the supply chain, and that will ultimately increase the availability of products in Tetra Pak packages on store shelves.





Tetra Pak's sustainability efforts are currently focused on renewability, reduction and recycling.

The retail gateway to sustainable markets

The public focus on sustainability issues – climate change, waste, sustainable sourcing and overconsumption – is intensifying and many consumers want to play their part. They are therefore increasingly loyal to companies that conduct their business in an environmentally and socially responsible way and realize that they themselves can act by buying products with lower environmental footprints from companies they trust.

Because of their direct consumer interface, retailers in particular in the US and Europe have come to be pivotal actors in responding to sustainability challenges. Wal-Mart's introduction in 2006 of its packaging score-card helped catapult sustainability issues high on the agenda of senior management in many consumer goods, food and packaging companies.

Packaging has been and remains a priority retailer focus, followed by products including food. Led by heavyweights like Wal-Mart, Carrefour and Tesco, numerous retailers have committed to 'green' their own operations and stock their shelves with products sourced from suppliers also committed to deliver 'greener' products and services. These

initiatives, driven by consumer preference but also by government policies urging a quasi-regulatory role on retailers, reflect the push for environmental performance and standards throughout entire value chains. Pursuing such objectives benefits retailers by creating sustainable growth, long-term profits and competitive advantage.

This, together with pressure from non-governmental organisations, means that retailers appear increasingly to accept the challenge of helping maintain the ability of the planet's eco-systems to provide food, fresh water, raw materials and fuels – all the eco-system services that underpin our economies, and nurture development and social justice.



“Consumers can be at the heart of the strategy to tackle climate change. The prize is a consumer-driven revolution in low-carbon consumption”

– Terry Leahy, CEO Tesco plc, 2010
Corporate Responsibility Report



Tesco is aiming to be a carbon neutral business by 2050.

Expanding scope of requirements

Sustainable business agendas have been around for some time, but retail's new leadership role has altered the requirements for sustainable performance for individual companies – spreading from food, wood and electronics products to more sectors. Suppliers must now increasingly negotiate sustainability requirements with retailers and maybe other stakeholders in the chain, which requires good intelligence on sustainability trends and stakeholder preferences.

Wal-Mart in Worcester, Massachusetts, USA is one of the first in the Group to use microturbines in its parking lot to generate clean renewable energy to the store.



Retailers' sustainability programmes, together with those of major brand suppliers, have thus become a key focus for all supply chain stakeholders seeking to compete in a greening market. Retailers are not just broadening the scope of product coverage but their social schemes too, like the *Supplier Ethical Data Exchange*.

Suppliers' voluntary commitments to sustainability continue to be significant, but mandatory retailer sourcing programmes are gradually gaining ground. As a result, company commitments that might be a market differentiator now may in future have to be made to fit specific retailer requirements. Moreover, demands on suppliers are further increasing when retailers are committing publicly to quantitative targets and timelines. For example, in the UK, one of Tesco's targets is to reduce the carbon footprint of its whole supply chain by 30% and be a zero carbon business by 2050. Asda has committed to zero waste to landfill by end-2010. Sainsbury's aims for 90% of the wood products it sells to be certified by the Forest Stewardship Council (FSC) by 2012.

“Sustainability has a central role to play in our business strategy”

– Lars Olofsson, CEO Carrefour Group, 2009
Sustainability Report Website on
www.carrefour.com)

The public nature of retailer targets has further consequences. Suppliers need to clearly demonstrate improved product performance and have any related consumer claims independently verified. Product performance standards, such as eco- and energy- labels, CO₂ reduction labels, FSC (paper and timber products), Marine Stewardship Council labels (seafood), or Fairtrade are on the rise. As the demand for independently validated product information increases, suppliers who understand the environmental footprint of their products and have strategies and programmes to minimize impacts will be at significant advantage.

Food sector sustainability requirements: products, packaging and more
Responding to pressures for well-being and sustainable lifestyles, retailers are creating programmes to provide healthier and more sustainable food products. But food is only part of the sustainability picture. Packaging remains a priority for retailers and an emerging focus is the sustainability performance of food suppliers overall.

Looking forward, new requirements can be expected for key mainstream (non-organic) food categories like meat and dairy. The climate impact of dairy appears high unless put in context with the high content of essential nutrients. The climate issue and the continuing packaging waste debate could also impose environmental requirements on juice. At the same time, initial assessments relating the environmental impacts of dairy and juice products with their nutrition benefits could help to relate environment and societal aspects of sustainability to the benefit of retailers and consumers.

Tetra Pak Argentina



FSC certification is increasingly requested by retailers and knowledge about what it means is growing among consumers.



Tetra Pak Romania

Carrefour and Tetra Pak in Romania work together to encourage consumers to take action for the climate challenge through recycling of milk cartons, among other things.

Retailers set packaging targets

Retailers are expected to contribute to solving packaging waste issues. Many food chains have packaging specialists to develop purchasing strategies for sustainable packaging, an area which many consumers pay attention to.

Retailer packaging programmes tend to insist either on the replacement of high impact materials with more environmentally efficient materials, on reducing packaging weight, on recycling, or on a reduction in the amount of packaging used. Retailers tend to ask suppliers both for data on current packaging performance and on improved lifecycle performance. Wal-Mart's 2006 packaging scorecard programme requires suppliers to evaluate performance relative to their

competitors based on for instance recycled content and greenhouse gas emissions. Tesco set a packaging reduction target and Carrefour has been optimising packaging weights starting with its own-brand products.

Legitimization of retailer requirements

Retailers design their sustainability programmes and supplier rating schemes based on their own needs. However, they are not acting alone. Retailers need stakeholder endorsement and legitimacy in making their choices. Most consumers, however, want their choice made easy and are happy to trust the retailer's use of choice editing to achieve this and to buy the brands they put on their shelves. Most retailers engage non-governmental organisations, academics, leading suppliers and government agencies to help identify priorities, and the outcome of such consultations tends to reflect national public debates. The EU, for example, has encouraged retailers and food manufacturers to act as gatekeepers to sustainable consumption and the greening of supply chains this entails.

"At the height of this recession, we promised we would broaden and accelerate our commitment to sustainability. Today sustainability is sustainable at Wal-Mart"

– Mike Duke, CEO Wal-Mart Stores Inc., remarks prepared for 2010 Shareholders Meeting, (on www.walmartstores.com)

Communicating sustainable performance

Sustainability, and the way its market requirements are shaped by retailers, creates a challenging environment. Consumer goods companies need to act to maintain share of shelf-space and be proactive to grow it. This is easier said than done. Pressures for sustainability performance, without a common language for communicating it, are complex and confusing. Helpful clarifications include



A customer buys sustainable products in reusable shopping bags.

the 'metrics' of *The Consumer Goods Forum*, which seeks a common global language for packaging sustainability, and the common principles agreed by *Europe's Retail Forum* and endorsed by the EU. This new framework is a promising starting point for the dairy sector to roll out its global climate commitment.

The outlook

Growth in sustainable purchasing is incontestable and in many countries the fastest growing market. With governments promoting green markets and retailers acting as pre-emptive catalysts, companies who follow the trend will prosper. Anticipation and leadership will be required of suppliers to achieve this.

In addition, they need rules of the game for the new sustainable marketplace, and rules for product assessment to enable fair competition. To avoid losing consumer trust, clear rules are also needed for communicating environmental performance (such as are being developed by the *European Food Sustainable Consumption and Production Round Table* and *The Sustainability Consortium*). Credibility should not be sacrificed to PR.

In conclusion, everyone in the supply chain has to deliver measurable environment impact reductions for their products and demonstrate they have been produced and traded under decent labour and ethical conditions.



“The butterfly effect” is a metaphor for a particular form of order or disorder, meaning that a small change at one place in a complex system can have large effects elsewhere, at a later date.



The retail sector is becoming an ever-more critical part of Tetra Pak's business, both in terms of the direct sales that it is generating and the influence it is having over many of our customers. Therefore, we collaborate in some cases, and through our customers, in 3-party business models to develop more relevant marketing strategies, based on a common objective – to understand consumer buying behaviour.

Our customers are those who determine to where and to whom our packaging will be distributed and sold. Therefore, we do everything we can to make their packaged products available everywhere – products that are safe, sustainable and of the quality required by consumers.

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