



**GO SHELLFISH**

**#godeliciousness**

Gonzalo Campos- May 28, 2019

# Company Overview

## BY THE NUMBERS

## WHO WE ARE

*Sealed Air Corporation is knowledge-based company focused on packaging solutions that help our customers achieve their sustainability goals in the face of today's biggest social and environmental challenges.*

*Our portfolio of widely recognized brands, including Cryovac® brand food packaging solutions and Bubble Wrap® brand cushioning enables a safer and less wasteful food supply chain and protects valuable goods shipped around the world.*

*Sealed Air generated \$4.5 billion in sales in 2017 and has approximately 15,000 employees who serve customers in 122 countries.*

## VISION

**TO CREATE A BETTER  
WAY OF LIFE**

## MISSION

**RE-IMAGINE™ THE INDUSTRIES WE SERVE  
TO CREATE A WORLD THAT WORKS BETTER**



# Sealed Air 2025 Sustainability Pledge

<https://i.sealedair.com/social/ted-doheny/sealed-airs-bold-2025-sustainability-plastics-pledge>

## SUSTAINABILITY

*At Sealed Air, we pledge to design and advance our innovative packaging solutions to be 100% recyclable or reusable by 2025.*

*We will accelerate the use of recycled materials, expand reuse models for our packaging, and lead the collaboration with partners worldwide to ensure execution.*

*Ted Doheney, President and CEO, Sealed Air  
October 2018*

### **Collaborate for Change**

*Lead collaborations with partners worldwide to increase recycling and reuse rates.*

### **Invest in Innovation**

*Design and advance packaging solutions to be 100% recyclable or reusable.*

### **Eliminate Plastic Waste**

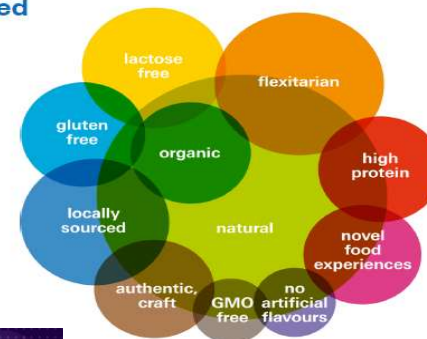
*Achieve an ambitious target of 50% average recycled content across all packaging solutions of which 60% is post-consumer recycled content.*

New consumer trends.- We must re-assure Authentic, Just in time, PDO, fresh and healthy!  
It represents a paradigm shift in the industry with premium qualities reaching new importance.



Source: Euromonitor International

Consumer expectations are holistic, multi-dimensional and intertwined



Nestlé Investor Seminar 2017



CRYOVAC®

Source(left and right) from the internet  
[https://www.innovamarketinsights.com/wp-content/uploads/2019/02/IMI\\_TopTenTrends\\_2019\\_AnufoodBrazil.pdf](https://www.innovamarketinsights.com/wp-content/uploads/2019/02/IMI_TopTenTrends_2019_AnufoodBrazil.pdf)



Current situation.-For all consumers including the ones with flexitarian diets  
Warm water Shrimps in general hits the target with EASIER to prepare



Shrimp import trends in the top 5 markets in EU28 (January–September)

Markets	percent change		
	2017	2018	2018/2017
(1 000 tonnes)			
Spain	111.9	113.2	+1.2
France	81.3	80.9	-0.5
Denmark	59.1	64.7	+9.4
Netherlands	48.6	63.2	+30.0
United Kingdom	56.1	55.4	-1.1
EU28 Total (includes Other)	556.9	582.5	+4.7

Source: Eurostat

The Shellfish market offers enormous open doors for development.

# Cryovac® Sealappeal®

Easy to prepare affordable fresh ingredients

- Microwaveable packs with **real easy-opening**, transparent films for: **Consumer Convenience & Freshness** (real and perceived). Light and leaner products

Also Innovative Papillote Style presentations!

Generation  
Gap

Urbanisation

Health and  
Wellness

**CRYOVAC®**



Shrimp **as an ingredient** to inspire EU from Norway on easy to prepare meals  
Sealappeal® to pack single portions of 90-200 gr.



**CRYOVAC®**

France and UK have one thing in common:  
Their prawns products are:

- 1.-Exotic and holiday note
- 2.-A versatile and adaptable product in terms of uses and recipes, almost an ingredient
- 3.-Practical presentations



## Convenience for each moment of consumption in France





## Could Shellfish be the next SEACUTERIE thrill?



Social



Sharable



Snackable



## Key Packaging Sustainability Attributes

Make nutrition available, convenience, improve costs and reduce food waste



Ensure that the food arrives intact or not damaged

Extends food quality and shelf life

Transforms into Premium Experiences and naturalness

Provides Functionality: Pasteurisation, microwavable

Resource Reduction: Weight/shape/size, thinner gauge

Circular Economy/Recyclability

# Fresh, Healthy, Natural and Easy to prepare at home for flexitarians!

Available, convenient, affordable categories with more sustainable packaging

Dinner at home

Easy to cook

Natural Tapas

BBQ Season

Flexitarians

Sushi/  
Snacking

Easy to prepare

PUB



“natural” claim on its own won’t be enough to delight consumers

Source: Mintel – What’s next for clean label?



## Some of the new HEALTHY categories!

New moments of consumption are created. Could Shellfish complement these or enter as ingredient?.



**BOWLS**  
Salads  
60 M



**SOUPS**  
75 M



**WOKS**  
5 M



**SALADS**  
5 M



**SKILLETS**  
Veggies and  
Quinoa(combinations)  
5 M

Cutting-edge fusion of cuisines is also an opportunity

Affordable seafood for consumers.- Consumer need to manage costs effectively, mono portions.

Depending on tray and final usage, the most sustainable packaging strategy, lid or laminates

#### Snack Pots



Pasteurized in the pack

# GO PRAWNS

Sealed Air  
Food Care



GO NATURAL



GO FIT



GO FLEXITARIAN



GO BBQ



GO EASY

#godeliciousness

**CRYOVAC®**

Unlimited campaigns: COOKING, TRAVEL; SUMMER, FREE, FAST; ON



# GO Crustaceans Pots



GO JUMBO



GO WILD



GO HEALTHY



GO HAPPY

**CRYOVAC®**

#godeliciousness

# GO SHELLFISH



It is about the experience



GO HIGH QUALITY

GO UNIQUE FIAVOR

GO PREMIUM

GO NORWAY

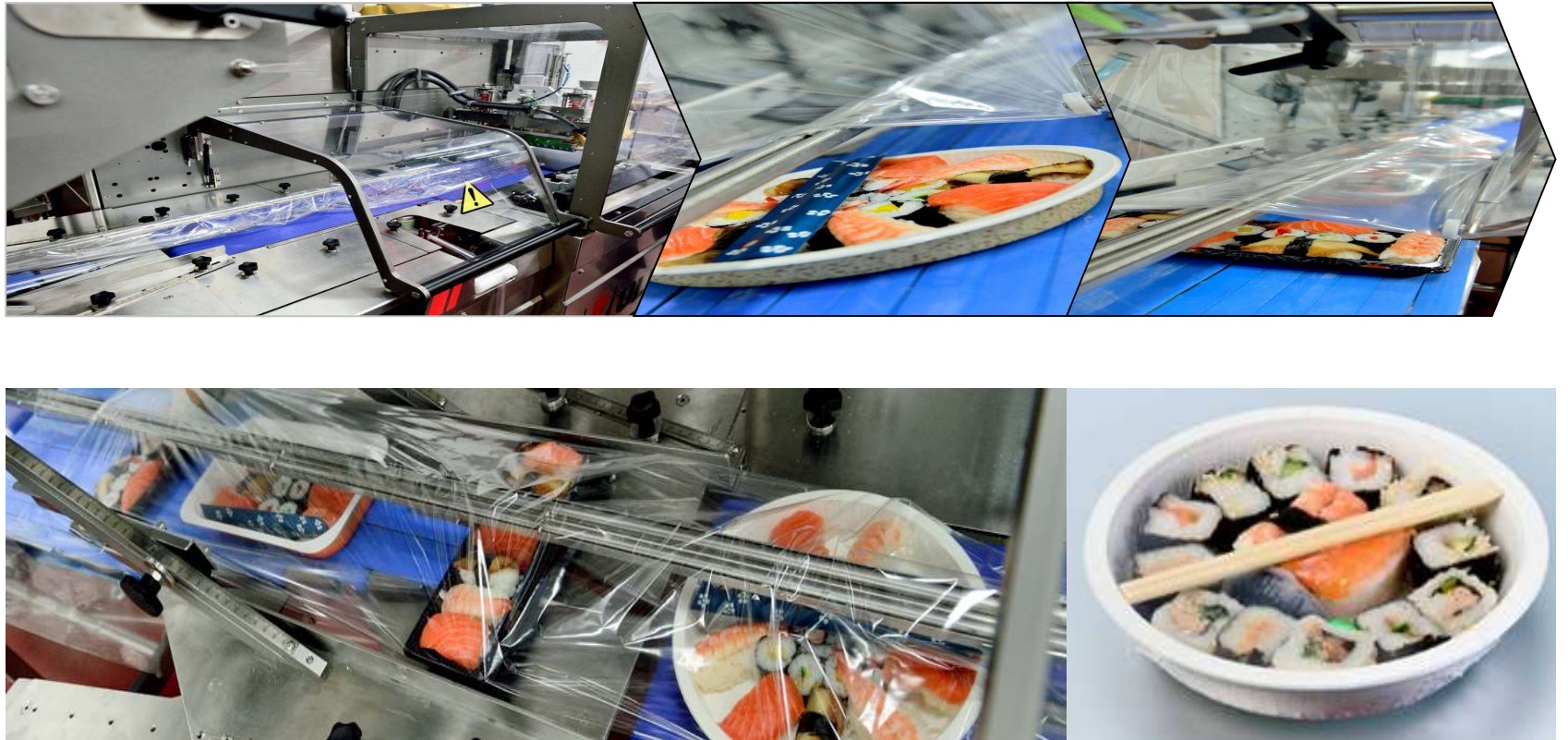
**CRYOVAC®**

Cryovac BDF®





How Cryovac BDF® would make Shellfish Sushi unique?



# Brake the retail rules and molds:



Versatile, sustainable, responsible packaging for *Plastic reduction in BDF®*



Application  
Support

**Dedicated range  
Shrink unit system**

Immediate Plastic  
Packaging weight  
reduction

**CRYOVAC®**

Cryovac Darfresh®





A new Fresh prepacked fish monger destination in France  
Grand Frais, moved up fresh fish perception with Darfresh® Rollstock



More Sustainable

Showcase "Fresh & Quality"

EZO

Portion Control

# A Festive BONELESS TREAT

Darfresh® could give attitude to Shellfish that are a friendly product but also festive, gastronomic, dietetic and versatile



New fun & festive formats in Darfresh®

All you can eat prawns!

# Cold water shrimp could use some new packaging

## Ready-To-Eat Packs



New Premium design, printed pack formats in Darfresh®

# Cryovac® Darfresh®



value creation with Armonica pack presentation— design for a WOW the e-commerce user experience!



**CRYOVAC®**



# Trayskin



# Cryovac® Darfresh® SimpleSteps®



OPERATIONAL  
EFFICIENCY

- Steaming of the meal – retains flavour
- Known technology
- Flexibility - A wide range of different rigid trays can be used



BRAND  
BUILDING

- Visual impact on shelf
- Demonstrates freshness of ingredients
- Convenient food

## Simplesteps Cooking Process



# BBQ Healthy seafood:

ALU Tray + SKIN(mono material sustainable top skin)



# Cryovac® Darfresh® on Tray





# Top skin Cryovac® Darfresh® on Tray

Healthier perception to be reinforced with Sustainable and transparent packaging

Top Skin for  
mono-PP trays



TP200T (100 u)

Top Skin for mono-  
PET trays



TE300T (100 u)

Top Skin for  
PP/PE – PET/PE Trays



**CRYOVAC®**

Allow the use of 100% FULL-PET trays.  
This unique proposition makes the tray fully recyclable  
which it isn't today.

# Are your concepts instagrammable?

We need to seduce and help manage cost effectively.

Darfresh® on Tray



Lidl France

**CRYOVAC®**

# The importance of authenticity.-

motivated by living and sharing an experience







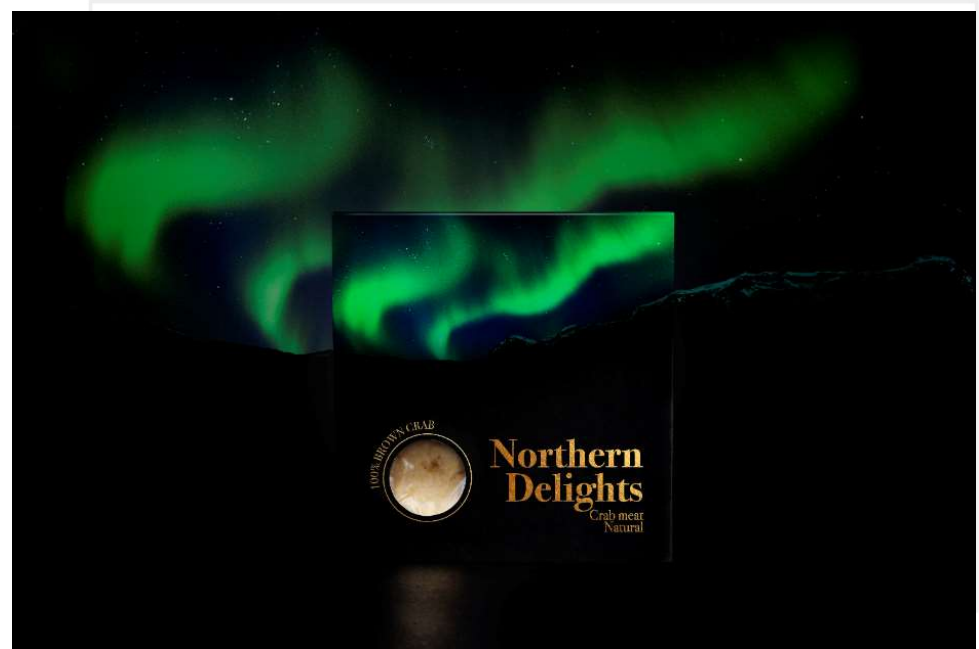
## The perception of Premium food is constantly evolving

Shaping the category:

Exceptional quality

Superior performance( versatile,  
optimized, indulging)

Better style with unique design



## 2019 Food Hall Forum.- June 4 or 5, Packforum, Milan



Food Hall – a unique, authentic, premium food destination. It is also called a theatre for food or a food-oriented boutique to help consumers indulge in a full spectrum of emotional experience with food.



**Premium is the promise of exceptional quality and experience, fuelling a growing taste for unique, value-added products.**

Packaging transforms the shelves in a FUN & convenient destination  
Bring new emotions and give consumer strongly Fresh, Healthy, Easy to prepare Seafood!

