



# Passport

Making sense of global markets

## **PACKAGING DEFINITIONS**

**EUROMONITOR INTERNATIONAL**

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# 1. DATA TYPE DEFINITIONS

## 1.1 PACKAGING SALES CHANNELS

### Retail/Off-Trade

Retail sales are defined as sales through establishments primarily engaged in the sale of goods for home use, preparation and/or consumption. This includes grocery retailers, supermarkets/hypermarkets, superstores and warehouse clubs, hypermarkets, co-operatives, discounters, convenience stores, independent grocers, forecourt retailers, food/drink/tobacco specialists, booksellers and stationers, chemists and druggists, clothing/footwear/leatherwear/accessory outlets, confectionery, and news retailers (CTNs), department stores, DIY, gardening and hardware outlets, electrical, electronic and computer outlets, home furniture and furnishings outlets, jewellers, mail order, record/video games outlets, sports goods outlets, toy shops, variety stores, other food and non-food retailers.

This also includes non-store retailing such as vending, homeshopping, internet retailing and direct selling.

Retail sales exclude sales to/through hotels, duty-free sales, wholesale industries (including cash-and-carry) and institutional sales (sales through/to hospitals, prisons/jails, military, schools, etc, also known as contract foodservice). Our retail definition also excludes the purchase of food and beverage products from foodservice outlets for off-premise consumption, eg impulse confectionery bought from the counters of cafés/bars. It also excludes the informal retail sector.

In the packaging system we measure retail/off-trade unit volumes across Soft Drinks; Alcoholic Drinks; Hot Drinks; Beauty and Personal Care; Home Care; Dog and Cat Food; and Packaged Food.

### Foodservice/On-Trade

Foodservice sales are defined as sales to – not through - foodservice establishments. This includes full-service restaurants, cafés/bars, fast food outlets, 100% home delivery/takeaway, self-service cafeterias, street stalls/kiosks etc.

This excludes sales to/through hotels, duty-free sales and institutional sales (sales through/to hospitals, prisons/jails, military, schools, etc, also known as contract foodservice).

In the packaging system we measure foodservice/on-trade unit volumes for Soft Drinks and Alcoholic Drinks only.

## 1.2 PACKAGING VOLUME

### 1.2.1 Unit Volume

Unit volume is the number of units of packaging sold to the consumer. For example a 1-litre PET bottle of carbonates would be counted as a unit volume of one unit (PET bottle, carbonates).

#### Retail/Off-Trade Unit Volume

Retail/off-trade unit volume is the number of packaging units sold to the consumer through all retail channels.

Retail/off-trade unit volume information is available across Soft Drinks; Alcoholic Drinks; Hot Drinks; Beauty and Personal Care; Home Care; Dog and Cat Food; and Packaged Food.

#### Foodservice/On-Trade Unit Volume

Foodservice/on-trade unit volume is the number of packaging units sold to foodservice outlets.

Foodservice/on-trade unit volume information is available for Alcoholic Drinks and Soft Drinks only.

#### Total Unit Volume

Total unit volume is the aggregate of retail/off-trade and foodservice on-trade unit volume.

Total unit volume information is available for Alcoholic Drinks and Soft Drinks only.

## 1.2.2 Product Volume

Product volume is the amount of product contained in the packaging as sold to the consumer. For example a 1-litre PET bottle of carbonates would be counted as a product volume of one litre (PET bottle, carbonates).

### Retail/Off-Trade Product Volume

Retail/off-trade product volume is the amount of product sold to the consumer through all retail channels. This may be measured in litres, tonnes, kgs or units.

Retail/off-trade product volume information is available across Soft Drinks; Alcoholic Drinks; Hot Drinks; Beauty and Personal Care; Home Care; Dog and Cat Food; and Packaged Food.

### Foodservice/On-trade Product Volume

Foodservice/on-trade product volume is the amount of product sold to foodservice outlets.

Foodservice/on-trade product volume information is available for Alcoholic Drinks and Soft Drinks only.

### Total Product Volume

Total product volume is the aggregate of retail/off-trade and foodservice on-trade product volume.

Total product volume information is available for Alcoholic Drinks and Soft Drinks only.

## 1.3 PACKAGING CLASS

For products utilising just one pack type, this packaging is the primary packaging. For products utilising more than one pack type, one item of packaging will be the primary packaging and all other items will be secondary packaging.

### Primary Packaging

For products utilising just one pack type, this packaging is the primary packaging. For most alcoholic and soft drinks there is only one type of packaging for the product (ie the bottle, keg, liquid carton, or can). For example: a metal beverage can of carbonates – in this case the metal beverage can would be the primary packaging.

For products utilising more than one pack type, one item of packaging will be the primary packaging and all other items will be secondary packaging. **The primary pack type will be the branded packaging that is most closely associated with the product.** Below we give some guidance on how to identify which pack type is the primary packaging for different industries.

For packaged foods this is the branded packaging that the consumer sees on the shelf in the store. This is not necessarily the packaging that is closest to the product, but normally the packaging that offers the best protection for the product in terms of breakage. For example for breakfast cereals, the folding carton is the primary packaging as it is the printed pack that remains on the shelf, offers the best protection from product breakage and is the pack type that influences the consumer's purchasing decision. However, the folding carton also has an inner bag, so we count this also, but as secondary packaging. For this reason in packaged foods folding cartons are most likely to be the primary pack type.

For alcoholic and soft drinks there is typically only a primary packaging, and it is uncommon to have any secondary pack type. An exception is gift packs, for example a glass bottle of spirit sold in a printed metal tin or printed folding carton. In this case the bottle is the primary pack type. This is because both the bottle and tin are branded, but the bottle is retained as the packaging used to contain the product after purchase for the life of the product. This also ensures that all glass bottles in spirits are counted as primary regardless of the use of any gift packaging.

For beauty and personal care and home care the primary packaging is the branded product that the consumer retains for the life of the product. For example with a tube of toothpaste in a folding carton, the

tube will be primary packaging and the folding carton secondary. For this reason folding cartons are most likely to be secondary packaging in the beauty and personal care and home care industries.

Note: for products that come in kit form (present in categories such as colourants, perms and relaxants, tooth whiteners) the folding carton is considered to be primary packaging. This is because the kit may contain a number of pack types and it will not be clear that any one is primary. It is also likely that the folding carton is the only branded packaging and the kit is used in a single use, so the folding carton is not discarded before the product is used.

## Secondary Packaging

**Secondary packaging is all other packaging for the product, other than its primary packaging.**

Examples:



*Instant soup* – the folding carton is primary and the inner sachet is secondary. Note that both the primary packaging and secondary packaging should be recorded with the same pack size. For example a folding carton containing 5 x 10g aluminium/paper sachets would be recorded as a folding carton primary 50g and a flexible aluminium/paper secondary 50g – NOT five secondary units of 10g.

*Biscuits* – the flexible plastic packaging is primary and the other plastic tray is secondary

*Powder concentrates* – if a powder concentrate comes in a folding carton with an inner sachet, the carton is the primary packaging and the inner bag needs to be classified by its flexible pack type as secondary packaging. Examples of secondary packaging for powder concentrates are flexible aluminium/paper or plastic.

*Tea* – note that for tea most of the primary packaging will be the folding carton. If this folding carton is then wrapped in transparent plastic, the transparent plastic needs to go in as secondary flexible plastic. Please do not measure the tea bag itself (ie the paper around the tea leaves) as secondary paper, unless you have individually wrapped tea bags (ie the tea bag is in a paper envelope). If the tea bag is in a paper envelope, you need to measure this as secondary paper.

*Coffee* – in addition to standard instant coffee, cappuccino mixes are also included in instant coffee. In addition to traditional pack types such as glass jars (for products such as Nescafé), you should therefore include folding cartons with any secondary cappuccino sachets (allocated to relevant flexible pack type) in this category.

*Anti-ageing products* – the glass or plastic jar is primary (as this would be retained by the consumer) and the folding carton it comes in is secondary (as this would be discarded after opening).

*Toothpaste* – the tube the toothpaste is in is primary (as this would be retained by the consumer) and the folding carton it comes in is secondary (as this would be discarded after opening).

*Automatic detergent tablets* – as the folding carton will be retained by the consumer and has the branding on it then the folding carton is primary packaging and any flexible plastic used inside the

folding carton would be secondary.

*Hair colourants and perms* – because these are essentially kits, we measure the folding carton as the primary packaging. All inner tubes and bottles should be measured as secondary packaging. For example a primary 200ml folding carton may have two HDPE bottles of 75ml each and one tube of 50ml. However, these secondary packs would be classified, all at 200ml each.

## 2. PACK TYPE DEFINITIONS

### 2.0 TOTAL PACKAGING

Total packaging is the aggregate of flexible packaging, glass, liquid cartons, metal, paper-based, rigid plastic and other packaging.

#### 2.1 Flexible Packaging

The aggregation of aluminium foil, blister and strip packs, flexible aluminium/paper, flexible aluminium/plastic, flexible paper, flexible paper/plastic, flexible plastic and stand-up pouches.

##### Aluminium Foil

Aluminium foil is typically one thin sheet of aluminium used as a secondary pack type. Unsupported aluminium foil is found as direct contact wrapping, for example for individual sweets, boxed chocolates, chocolate tablets (usually in combination with a printed primary paper wrapper/carton wrap) and for some processed cheese products (eg [Dairylea triangles](#), [Laughing Cow triangles](#)). Chocolate with toys and seasonal chocolates are the main exceptions where aluminium foil is classified as a primary pack type.



##### Blister and Strip Packs

Blister and strip packs comprise a thermoformed plastic base with a foil or plastic cover through which a hole is pushed to access the product. Commonly used in medicated confectionery as well as in chewing gum eg [the Trident brand](#). These blister and strip packs are typically contained within a printed folding carton. "Blistered" chilled processed meat and seafood products are also included here eg [John West brand smoked salmon](#).

Other applications of blister and strip packs include packs with a clear moulded "blister" covering/holding the product with a carton board or plastic backing, such as in home care and beauty and personal care eg [Maybelline Lash Stylist mascara](#), [Harpic in-cistern device](#), [Oral-B toothbrushes](#), [Air Wick Plug In electric air fresheners](#).



##### Flexible Aluminium/Paper

Flexible aluminium/paper is typically a sheet of aluminium stuck together with a sheet of paper and is commonly used as the primary packaging for butter and dry dog and cat food and as secondary/inner packaging (typically inside a folding carton) for products such as dehydrated soups and sauces, baby food and other hot drinks (eg chocolate powder sachets).





### Flexible Aluminium/Plastic

Flexible aluminium/plastic is typically a sheet of aluminium stuck together with a sheet of plastic or plastic/aluminium/plastic combination and is commonly used for vacuum-pack ground coffee; although in some countries there is a shift to metallised plastic. Flexible aluminium/plastic can also be found in dog and cat food, dehydrated soup, sauces and other hot drinks. Aluminium/plastic has a glossy appearance and does not tend to tear as easily as other aluminium-based laminates, such as aluminium/paper.



### Flexible Paper

Flexible paper is all flexible packaging made of paper. Examples include paper overwraps for chocolate tablets, speciality cheese and soap. Please note that tea bags and paper-based coffee pods are technically classified as part of the product, NOT its packaging, and therefore are excluded here.



### Flexible Paper/Plastic

Paper/plastic laminates are films with a distinguished sheet of paper and another sheet of plastic, and which are stuck together. This packaging format is often found in sugar confectionery (such as toffees) and some cheese products; like Camembert and other soft/fresh cheese varieties.



### Flexible Plastic

Flexible plastic is conventional flexible packaging made of plastic including hermetically sealed packs, flow wrap and over wrap and any other flexible plastic wrapping material that is not a stand-up pouch. Flexible plastic has one of the most widespread applications in packaging, used as primary packaging for products such as confectionery, bakery products, dry dog and cat food, frozen food, snacks, pasta and rice. Includes all plastic overwraps such as for chilled foods, in addition to inner bags and wrappings for breakfast cereals, packaged bakery products and confectionery. Note: metallised plastic is included in flexible plastic; eg crisps brand Walkers.



### Stand-Up Pouches

The aggregation of aluminium/plastic pouches and plastic pouches. Pouches are flexible and include a base gusset to allow the product to stand unsupported.

Note: whether they are pre-made or form-fill-seal, pouches are made from at least three panels (front, back and base/gusset). If there are only two panels (so the product cannot stand up) then it is not a stand-up pouch and should be classified elsewhere.

Packs that are often referred to as a “pillow pouch” such as offered by brand Vikas are excluded.



### Aluminium/Plastic Pouches

Aluminium/plastic pouches are laminated stand-up pouches. These are commonly found in wet dog and cat food and still non-alcoholic beverages. Where pouches are of an aluminium/plastic laminate combination, it will not be possible to see any of the product contents.

Please note that stand-up pouches can be fitted with a zip/press closure, plastic screw closure or plastic dispensing closure; but we do not classify the tap style system on wine pouches, as a closure.



### Plastic Pouches

Plastic pouches refer to stand-up pouches made solely from plastic without any foil lamination. Such products are used for liquid detergents and for some chilled soups/sauces and shelf-stable soups. If the pouch has a window or it is possible to see the contents of the product through the pack then the pouch would be classified as plastic as it does not contain aluminium.



## 2.2 Glass

The aggregation of glass bottles and glass jars.

### Glass Bottles

Glass bottles may be of any size and can be cylindrical or shaped. The determining factor of a glass bottle is that it narrows at a neck in order to control the flow of liquid.



### Glass Jars

Glass jars have a wider mouth than glass bottles to enable the product user to “dip into” the jar (eg with a hand, spoon or knife). Common in spreads, coffee, prepared baby food and skin care in particular. **Include glass jar in which some candle air fresheners are sold, which may or may not have a closure.**

Please note that the paper layer found underneath the plastic screw closure for Nutella and to be torn off, is not classified as a closure type and can be ignored.



## 2.3 Liquid Cartons

The aggregation of brick liquid cartons, gable-top liquid cartons and shaped liquid cartons. Liquid cartons are typically used for still products as opposed to carbonated; with one exception being sorghum beer in some African countries.

### Brick Liquid Cartons

Typically used for long-life products, brick liquid cartons are either square or rectangular in shape and come in a range of sizes from portion packs of 200ml or 250ml for milk and juice, to 1-litre standard family packs to larger sizes of 1.5 and two litres. They come either with or without a liquid carton closure.



### Gable-Top Liquid Cartons

Gable-top liquid cartons are typically used for fresh juices and liquid food products, most commonly for fresh products, eg fresh milk, drinking yoghurt, fresh soups and fresh fruit juice. They are distinct from other liquid carton types by the specific gable shape at the top of the pack and can come with or without a closure.



### Shaped Liquid Cartons

Shaped liquid cartons include all packaging shapes constructed of liquid carton material that do not fall into the gable-top or brick liquid carton categories. Examples include Tetra Prisma, Tetra Classic, Tetra Wedge, Tetra Top and Combishape.



Note: **Tetra Fino Aseptic** is classified as Shaped Liquid Carton and is mostly used for long life milk and juices. The Tetra Fino Aseptic package comes with a straw hole or is opened using a pair of scissors. It must contain paper content, even though it might look like a pouch.



## 2.4 Metal

The aggregation of aluminium trays, collapsible metal tubes, kegs, metal aerosol cans, metal beverage cans, metal food cans, metal tins, and other metal.

### Aluminium Trays

All trays made of aluminium. Most commonly wrinkled type aluminium containers and typically used for ready meals, chilled foods and pet products. Please note that coffee pods as offered under the brand Nespresso, for example, are excluded and are classified as “Other Metal”.



### Metal Bottles

All bottles made of aluminium or steel. Commonly used in beer, also found in liquid concentrates, spirits, RTD coffee.

Please note that metal containers for liquid products and which have a cylinder shape, such as metal polish brand Brasso, are excluded and classified as metal tins.



### Collapsible Metal Tubes

Tubes that are made of aluminium and which can be squeezed to dispense the contents. Typically used in tomato pastes, facial moisturisers with a medical positioning and shoe polish.



### Kegs

Most commonly used for beer in pubs and bars (foodservice/on-trade), standard kegs tend to be large-volume barrel-like containers (20, 30, 50 litres etc) made from either metal or a mixture of metal and plastic in countries such as China and enabling the storage of beer under pressure. Also includes 4-litre and above party kegs/cans available via retail outlets to replicate the on-trade beer draught experience at home. These are not designed to be directly consumed from.

Please note that plastic-based kegs are excluded and classified as “Other rigid containers”.



### Metal Aerosol Cans

Products packaged under pressure in a metal can with a gaseous propellant for release as a spray of fine particles. Metal aerosol cans are commonly used for spray deodorants, spray air fresheners and spray insecticides.

Please note that metal aerosol cans all have an aerosol spray as a closure type; also typically a plastic overcap.



### Metal Beverage Cans

All cans made from either aluminium or tinplate that allow content to be drunk directly from it, and typically used to package beverages. These may be cylindrical or shaped. Includes slimline and sleek cans. Beverage cans come in sizes up to one litre/41 fl oz.

Please, note that we do not calculate closures on Metal Beverage Cans. We consider closures on metal beverage cans to be part of the can.



### Metal Food Cans

All cans of either aluminium or tinplate used to package foods. Also referred to as a tin can. These may be cylindrical, rectangular or shaped; but are typically (but not always) used to package moist/wet processed foods, as opposed to dried. The metal food can and its closure always form a hermetic seal, which allows for the long preservation of these food types. Includes cans used to package foods for human or pet consumption. Both 2-piece and 3-piece are included.



### Metal Tins

Metal containers used to store a range of typically (but not always) dry food and non-food products, which often come complete with a metal lid (but not always) that is classified as "other closure".

Products that use metal tins include polishes (shoe polish, metal polish and floor polish), confectionery, and gift packaging for spirits. Note: includes metal tins used for powder milk formula (which use a peel-off foil closure and a plastic overcap, or a peel-off foil and a plastic dispensing closure), as well as metal containers used for edible oils. Also note that some of these metal containers for liquid products sometimes have a cylinder shape; but they are still metal tins (eg. metal polish brand Brasso, pictured).

Metal tins differ from metal food cans in that the metal tin is not hermetically sealed with a metal based closure; something typical for metal packaging used for shelf stable foods and condensed/evaporated milk. They also differ from metal food cans in that they are designed to be used over a period of time with the contents not all used at once.



### Other Metal

Any other metal product that is not defined above, or is not flexible aluminium (which is defined in flexible packaging). Aluminium-based coffee pods as offered under the brand Nespresso are also included here.





## 2.5 Paper-Based Containers

The aggregation of bag in box, board tubs, composite containers, folding cartons and paper-based trays.

### Bag In Box

Bag in box is a common packaging format for larger sizes of wine. It is comprised of an outer folding carton, with an inner flexible bag known as a “bladder”. The product also has a dispensing tap attached to the bladder, but which fits through an opening on the folding carton.

Please note that we do not cover any closure type on bag in box.



### Board Tub

Board tubs include all cups/tubs/tubes that are made from paperboard only. Used for both dry and liquid products such as premium ice cream, yoghurt and chilled desserts. Board tubs differ from composite containers in that only one material is used. Board tubs often have a plastic or board overcap.



### Composite Containers

Composite containers are majority paper-/card-based containers, combined with another material type, such as a metal or plastic base or top. The material combination forms the container itself, and does not take into consideration the closure type (often a plastic overcap with a peel-off closure type underneath). Commonly used for dried food products like powdered hot and cold beverages, and also used for the [Pringles extruded snacks brand](#). Composite containers are also commonly used as secondary gift packaging for alcoholic beverages.



### Folding Cartons

A folding carton is made from paperboard and may be shaped, cubed or rectangular. Folding cartons are typically made from flat, direct-printed cartonboard and can come in varying thicknesses. Folding cartons can be completely formed from virgin fibre, or have full or part recycled content.



## Paper-Based Trays

Paper-based trays include paper-based, ovenable ready meal trays used for chilled and frozen ready meals. Paper or cartonboard discs such as those used beneath a pizza are also included in this category.



## 2.6 Rigid Plastic

The aggregation of HDPE bottles, PET bottles, PET jars, plastic trays, speciality cosmetic containers, squeezable plastic tubes, thin wall plastic containers, other plastic bottles, other plastic jars and other rigid containers.

### HDPE Bottles

Plastic bottles made from high-density polyethylene (HDPE), with a narrow neck. HDPE does not offer the transparency or clarity of PET, but HDPE properties are better for “squeezability”. HDPE bottles usually have a matt finish. HDPE “tottles”, which are bottles that have the closure on the bottom of the product, are included here.



Products made from HDPE have the resin identification code of “2”, which is often printed or stamped/moulded into the bottom of the bottle using one of the following symbols:



### PET Bottles

Polyethylene terephthalate (PET) bottles are available in a wide range of sizes and span all industries. They can be cylindrical or shaped but all have a narrow neck for pouring. PET bottles are usually clear and have a high shine finish.

PET bottles are common in soft drinks, mineral water and edible oil and are also heavily used in non-food categories like hand dishwashing products, household cleaners, shampoos, shower gels and other personal care products. PET bottles can also come in squeezable varieties.



Products made from PET have the resin identification code of “1”, which is often printed or stamped/moulded into the bottom of the bottle using one of the following symbols:

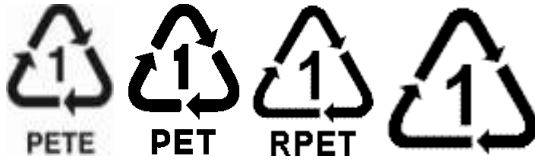


### PET Jars

Polyethylene terephthalate (PET) jars differ from PET bottles as the mouth of the container is wider to enable consumers to “dip into” the jar. PET jars are typically blow moulded. Jars made from PET have the resin identification code of “1”.



Products made from PET have the resin identification code of “1”, which is often printed or stamped/moulded into the bottom of the bottle using one of the following symbols:



### Ready Meal Trays

Ready meal trays that can be formed from plastic are typically unprinted within a folding carton sleeve/box. Ready meal trays are differentiated from “other trays” by the fact they can be put in the oven and/or microwave. Ready meal trays are often made from crystallised polyethylene terephthalate (C-PET).

Ready meal trays are typically sold with an extra layer of packaging, such as flexible plastic or folding carton which bears the branding. Therefore the ready meal tray is typically secondary packaging.



### Other Plastic Trays

All trays made of plastic that are used as inserts for boxed assortments as well as for some biscuit and cake product lines where they are used for their protective properties. Expanded polystyrene (EPS) trays or other plastic trays that are not ovenable, eg as commonly found in chilled processed foods or beneath pizza bases, are also included in this category.

If the tray is sold with no outer layer of packaging but simply a peel-off type closure, then this tray is primary. If sold within another pack type such as flexible plastic or folding carton, then the tray is secondary.



### Speciality Cosmetics Containers

All containers that are formed specifically for the cosmetics industry. Typically used for colour cosmetics. Includes compacts used for eye shadow and powders and lip stick mechanisms. Note: bottle type containers that include a wand or other applicator are included here. Products such as foundations that come in a bottle are still defined as bottles and not speciality cosmetics containers. Similarly, any creams or make-up that is in a tub, jar or tube are allocated to these packaging types, accordingly.



### Squeezable Plastic Tubes

All flexible tubes made of plastic. Typically used for toothpaste and also common in skin care and sun care.



### Thin Wall Plastic Containers

Thin wall plastic containers are commonly found in the dairy category for products such as yoghurts, dairy desserts, cream and fresh, soft and spreadable processed cheese as well as for ice cream, butter, margarine and spreads. Also found in mini formats in dairy such as 10g thin wall plastic containers for coffee whiteners and also in fresh ground coffee pods such as the brand Malongo. As the name “thin wall” implies, these containers are of a more flexible nature than rigid plastic jars.



### Other Plastic Bottles

Other plastic bottles are any rigid plastic bottles that are neither PET nor HDPE. They include polyvinyl chloride (PVC), polypropylene (PP), and any other plastic polymer or polymer combinations used to make bottles. Other plastic bottles can be found typically in sauces, dairy, hair care and deodorants. “Tottles”, which are bottles that have the closure on the bottom of the product, are included here when not made from HDPE or PET.

NOTE – very large bottles such as five litres and above for bottled water are often polycarbonate, which is defined as other plastic bottle (however please do check as increasingly these larger bottles are now being made from PET).



Bottles made from other plastics (not HDPE and not PET) will commonly have one of the following resin identification codes printed or stamped/moulded into the bottom of the bottle:



### Other Plastic Jars

Other plastic jars differ from plastic bottles as the mouth of the container is wider to enable consumers to “dip into” the jar. Includes all plastic polymer types, excluding PET, notably HDPE, PP and PS jars. Other plastic jars can be blow-moulded or extruded.



Jars made from other plastics (not PET) will commonly have one of the following resin identification codes printed or stamped/moulded into the bottom of the bottle:



### Other Rigid Containers

Any other rigid plastic container that is not specifically for cosmetics and that does not fit into any other plastic category. Examples include the container for mints used by the Smint brand, pump action toothpaste and plastic containers for wet wipes. Plastic-based beer kegs are also included here.



## 2.7 Other Packaging

### Other Packaging

Includes all other niche packaging formats not included in the other packaging definitions. Typical types include hessian sacks for products such as rice in Asia and speciality cheese and ceramic/earthenware containers for local speciality alcoholic beverages and some foodstuffs.



### 3. MULTIPACK DEFINITIONS

Multipacks are used to group several containers together into a single unit, and come in various shapes, sizes and materials. **With the exception of yoghurt, dairy-based desserts and fromage frais and quark, multipacks are for products that can also be sold as a single unit.**

Euromonitor International measures multipacks in alcoholic drinks, soft drinks and dairy products only.

Multipack data is entered as a percentage of the units (by pack type) that are packaged in a multipack of a particular type and size. For example if half of all metal beverage cans in a category are packaged in fully enclosed cartons of six units, we would enter this as 50%.

*Important distinction between multipack and primary/secondary packaging:*

*In foods, we only look at multipacks within dairy. In categories like spoonable yoghurt, dairy based desserts and fromage frais and quark, this includes items which are sold in multiple quantities. These multipacks are typically open cartons but also include “other multipacks”; whereby the containers are simply attached to each other with no extra layer of packaging involved.  
Eg. Petits Filous fromage frais and quark in France*



*Outside of dairy, multipacks are to be ignored. These can be found in shelf stable meat, fruit, seafood, also rice and prepared baby food. Eg. Dole Fruit & Juice canned/preserved fruit in the UK*



*Please also note that miniature versions of products such as Mars minis countlines or Jacob's Mini Cheddars Original (savory biscuits and crackers), are not multipacks, therefore the outer pack is a primary pack and the individual wraps around each item inside is classified as a secondary pack.*



#### Baskets

Baskets refer to cartonboard multipacks where the product is secured from the bottom, but a large proportion of each container is visible. Usually baskets have a handle for ease of transportation.



#### Board-Based Trays

Board-based trays are cartonboard multipacks, typically of a large surface area to group together and support high unit volume multipacks, such as for 12 or 24 units. In addition to the tray itself, it often also includes a shrink wrap film to keep both products and cartonboard tray together.



### Crates – Wooden and Plastic

Either wood- or plastic-based multipacks that hold the products from the bottom and on which handling is allowed by handles designed on each side.



### Fully Enclosed Cartons

Carton-based multipacks that do not allow the products to be seen. They are sometimes equipped with a handle in order to ease portability. Commonly used for glass bottles and metal beverage cans in beer and carbonates.



### Open Cartons

Carton-based multipacks that are not fully enclosed and typically surround the products vertically. They allow the products to be seen. They differ from basket-type multipacks and board-based trays in that they do not only hold the products from the bottom.



### Rim-Applied Carriers

Rim-applied carriers are a flexible plastic multipack type that groups metal beverage cans together around the rim. Flexible carriers are applied to containers by stretching the carrier around the diameter of the container and allowing the stretched carrier to recover, providing a tight fit.





### Shrink Wrap Only

Multipacks solely made of shrink wrap film that allow part of the products and their shapes to be seen. Commonly used with rigid plastic bottles and metal beverage cans.



### Other Multipacks

Any multipack type that does not fall into any of the previous categories.

Please note that thin wall plastic containers sold in multiple quantities as attached to each other (form-fill-seal packaging process), with no other multipack type wrapped around them, (typically some in spoonable yoghurt, chilled dairy-based desserts and fromage frais and quark) are to be classified as primary packaging but also as Other multipack.



## 4. RETURNABLES DEFINITIONS

### Returnable

Bottles that are marketed as returnable, i.e. made specifically for a returnable system. After this type of bottle is returned to the retailer, it is then returned to the filler, which cleans and refills the bottle. A returnable system is available in certain countries only. It means bottles are returned to a retail outlet, or central collection point and in countries a deposit may be returned to the customer for returning the bottle (eg taking a 500ml glass bottle back to a shop and receiving €0.10).

In the Packaging data, the volume of returnables and measure it against that of non-returnables. Returnables and non-returnables are captured in Packaging for soft and alcoholic drinks, retail and foodservice channels. Returnables are typically glass bottles; although PET bottles and polycarbonate (other plastic) bottles can also be found for example many large and robust water cooler bottles that are refilled multiple times,

In the packaging research you need to assign the percentage of retail/off-trade and on-trade packs for plastic bottles (PET, HDPE and other plastic separately) and for glass that are returnable.

**Recyclable does not mean returnable.**