



Retail Branding and
Information Solutions

BRANDING SOLUTIONS UPDATE

AVERY DENNISON | RBIS
ELEVATE BRANDS
ACCELERATE PERFORMANCE

JEREMY WHITE
HEAD OF INNOVATION, EXTERNAL EMBELLISHMENTS
AVERY DENNISON, RBIS

PHILIPP SKAL
HEAD OF SUSTAINABLE BRANDING SOLUTIONS
AVERY DENNISON, RBIS



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THE INFLUENCE OF SUSTAINABILITY ON INNOVATION

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**THE INFLUENCE OF SUSTAINABILITY
ON INNOVATION**

**WE PROVIDE INTELLIGENT, CREATIVE
AND SUSTAINABLE SOLUTIONS THAT
ELEVATE BRANDS AND ACCELERATE
PERFORMANCE THROUGHOUT THE
GLOBAL SUPPLY CHAIN.**



THE INFLUENCE OF SUSTAINABILITY
ON INNOVATION

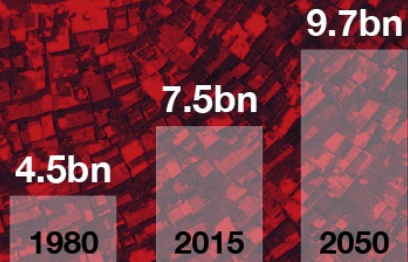
SUSTAINABILITY

A surreal forest scene where the ground is covered in thick, vibrant green moss. Several men in dark suits and one in a white shirt and tie stand on the mossy terrain. The background is filled with dense, dark green foliage and trees. The overall atmosphere is mysterious and ethereal.

THE INFLUENCE OF SUSTAINABILITY
ON INNOVATION

MACRO TRENDS

THE INFLUENCE OF SUSTAINABILITY ON INNOVATION



9.7bn
2050 POLULATION*

- RESOURCE CONSTRAINTS
- ABUNDANCE WITHOUT WASTE
- CIRCULAR ECONOMY

* United Nations, Department of Economic and Social Affairs

THE INFLUENCE OF SUSTAINABILITY
ON INNOVATION

170M

CHILD LABOUR IN
TEXTILE INDUSTRY

2.3M

WORK RELATED DEATHS*



- FAIR TRADE
- COMPLIANCE AS AN OPPORTUNITY
- PROVE THE PROGRESS

* International Labour Organization

THE INFLUENCE OF SUSTAINABILITY
ON INNOVATION

SORRY

CELEBRITIES




THE INFLUENCE OF SUSTAINABILITY
ON INNOVATION

HUMOR

THE INFLUENCE OF SUSTAINABILITY
ON INNOVATION

NO COMPROMISES

A woman in traditional African attire, including a blue wrap and a patterned skirt, is lying on the ground in a dry, dusty landscape. She is holding a modern, white, quilted bag with two zippers. The bag is a stark contrast to her traditional clothing and the environment. The background shows sparse vegetation and a clear sky.

THE INFLUENCE OF SUSTAINABILITY
ON INNOVATION

CONSUMER INSIGHTS



THE INFLUENCE OF SUSTAINABILITY
ON INNOVATION

THE POWER OF BRANDING

A GLOBAL STUDY FROM AVERY DENNISON DETERMINED THE RELATIVE VALUE CONSUMERS PLACE ON THE LABEL, TAG AND PACKAGING WHEN PURCHASING A GARMENT.

AS A RESULT OF THIS STUDY, WE HAVE LEARNED THAT SUSTAINABILITY MATTERS AND ATTITUDES ARE SHIFTING.

FOR THE CONSUMER, IT'S NOT JUST THE MATERIAL BUT ALSO THE WAY IT'S MADE THAT IS IMPORTANT.

THE INFLUENCE OF SUSTAINABILITY
ON INNOVATION

THE POWER OF SUSTAINABILITY

INTERESTED IN BUYING GARMENTS MADE
IN A SOCIALLY AND ENVIRONMENTALLY
RESPONSIBLE WAY



87%
OF CHINESE
CUSTOMERS



72%
OF EUROPEAN
CUSTOMERS



50%
OF AMERICAN
CUSTOMERS

THE INFLUENCE OF SUSTAINABILITY
ON INNOVATION

THE POWER OF SUSTAINABILITY



88%
OF CUSTOMERS

EXPECT BRANDS TO
TAKE MEASURES TO
BE ENVIRONMENTALLY
FRIENDLY*



78%
OF CUSTOMERS

BELIEVE THEY CAN CHANGE
COMPANY BEHAVIOR WITH
PURCHASING POWER*

* Aspirational Consumer Index, BBMG and GlobeScan

THE INFLUENCE OF SUSTAINABILITY
ON INNOVATION

THE POWER OF SUSTAINABILITY



90%
OF CUSTOMERS

ARE WILLING TO PAY
MORE FOR PRODUCTS
PRODUCED IN A SOCIALLY
& ENVIRONMENTALLY
RESPONSIBLE MANNER*

* The Curve Report, NBC Universal

THE INFLUENCE OF SUSTAINABILITY
ON INNOVATION

PARTNERS COMMITMENTS

THE INFLUENCE OF SUSTAINABILITY
ON INNOVATION

OUR COMMITMENTS



THE INFLUENCE OF SUSTAINABILITY ON INNOVATION

OUR GOALS

GREENHOUSE GAS EMISSIONS ACHIEVE AT LEAST 3% ABSOLUTE REDUCTION YEAR OVER YEAR.

PAPER SOURCE 100% CERTIFIED PAPER, OF WHICH AT LEAST 70% WILL BE FSC* CERTIFIED.

FILM 70% OF FILM PRODUCTS WILL CONFORM TO OR WILL ENABLE END PRODUCTS TO CONFORM TO THE GUIDING PRINCIPLES.

CHEMICALS 70% OF THE CHEMICALS PURCHASED WILL CONFORM TO OUR GUIDING PRINCIPLES.

PRODUCTS & SOLUTIONS USE INNOVATION IN SUSTAINABILITY (OURS AND OTHERS') TO GROW REVENUES FROM SUSTAINABILITY DRIVEN PRODUCTS AND SERVICES. 70% OF PRODUCTS AND SOLUTIONS WILL CONFORM TO OUR GUIDING PRINCIPLES OR WILL ENABLE END PRODUCTS TO CONFORM TO THE GUIDING PRINCIPLES.

WASTE BE 95% LANDFILL FREE (LFF) WITH AT LEAST 75% OF WASTE REDUCED, REPURPOSED OR RECYCLED.

TRANSPARENCY COMMIT TO GOALS PUBLICLY AND BE TRANSPARENT IN REPORTING PROGRESS AGAINST THEM.

PEOPLE CULTIVATE A DIVERSE, ENGAGED, SAFE, PRODUCTIVE AND HEALTHY WORKFORCE. CONTINUALLY INVEST IN OUR EMPLOYEES AND COMMUNITIES IN WHICH WE WORK.

THE INFLUENCE OF SUSTAINABILITY
ON INNOVATION

OUR GUIDING PRINCIPLES

1. DON'T POLLUTE WITH EXTRACTED MATERIALS
2. DON'T POLLUTE WITH MANUFACTURED MATERIALS
3. DON'T OVER-HARVEST OR OVER-ENCROACH ON LIVING SYSTEMS
4. DON'T IMPEDE PEOPLE'S WELLNESS, INFLUENCE, COMPETENCE, EQUITY AND MEANING
5. DISCOVER AND CAPTURE LOST VALUE AT EVERY STAGE OF THE VALUE CHAIN
6. EMPOWER ALL OF OUR PEOPLE TO INNOVATE AND CREATE VALUE
7. EMBRACE THE COLLABORATION THAT IS INHERENT TO SUSTAINABILITY
8. CREATE SHARED VALUE FOR OUR CUSTOMERS, THEIR VALUE CHAINS AND THE COMMUNITIES WE SERVE

THE INFLUENCE OF SUSTAINABILITY ON INNOVATION

EXECUTION



WHAT

- PRODUCTS & MATERIALS
- PROCESSES
- PERFORMANCE

HOW

- PARTNERSHIPS
- RESEARCH & DEVELOPMENT
- INNOVATION PROCESS

THE INFLUENCE OF SUSTAINABILITY
ON INNOVATION

PARTNERSHIPS

- HALO BRANDS
- BRANDS & RETAILERS
- RESEARCHERS & SUPPLIERS
- NGO & ASSOCIATIONS

THE INFLUENCE OF SUSTAINABILITY
ON INNOVATION

PARTNERSHIPS



THE INFLUENCE OF SUSTAINABILITY
ON INNOVATION

AVERY DENNISON GREENPRINT™

Avery Dennison Greenprint™ helps customers make informed decisions about product sustainability and their raw material selection. We combine life-cycle assessment with creative design to enhance product presentation while reducing your impact on the environment. Greenprint brings intelligence, creativity and sustainability to fashion – helping you use less while elevating your brand.



THE INFLUENCE OF SUSTAINABILITY
ON INNOVATION

SUMMARY

- 1 SUSTAINABILITY MATTERS
- 2 MEASURE RESULTS AND MAKE THEM MEANINGFUL
- 3 SUSTAINABILITY IS A KEY DIFFERENTIATOR

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THE INFLUENCE OF SUSTAINABILITY
ON INNOVATION

A FORCE FOR GOOD

**THE INFLUENCE OF SUSTAINABILITY
ON INNOVATION**

THANK YOU!

philipp.skal@eu.averydennison.com

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