



NEWS RELEASE

Krolak Partners publishes new strategic analysis on sustainability challenges and opportunities for retort stand up pouches for human food with a European user mapping.

6th September 2021 – Retort stand up pouches (RSUP) are one of the most challenging packaging formats in the flexible packaging segment. The retorting process they have to undergo creates the need for a packaging material that can withstand exposure to temperatures to 121°C or above and high pressure for an extended period of time. Additionally, RSUP are chosen for ambient human food products with a typical shelf life of 12 – 36 months.

Until now RSUP have been based on a multilayer material typically consisting of various base polymers, such as OPET, OPA or CPP/BPP, and barrier materials. Due to the multilayer nature of the pack, RSUP were notoriously difficult to recycle and therefore either landfilled or incinerated with or without energy recovery.

The recent European Union move towards the circular economy has been the turning point for RSUP: a new sustainable and circular, i.e. fully recyclable, RSUP has been developed. This is an extremely important development not only for RSUP but for the flexible packaging segment as a whole.

'With the process started, we can expect more breakthroughs to be announced in the near future as a number of companies in the RSUP value chain are developing new and much needed solutions', says Krolak Partners' Chief Consultant and the report co-author, Antonello Lupato.

Ania Krolak, Krolak Partners' Director and the report co-author commented, *'Retort stand up pouches for human food face a number of sustainability challenges that are beginning to be addressed, introducing changes that will directly affect the industry and market.'*

The key challenges are:

1. development of a fully commercial supply chain in which there is competitive supply of recyclable RSUP
2. actual recycling of the recyclable RSUP
3. oversized packaging avoidance
4. optimisation of the recyclable RSUP shelf life
5. food grade post-consumer recycle (PCR) incorporation in RSUP

Together with challenges, new opportunities are emerging as the new recyclable RSUP a totally new set of raw materials. The future winner is likely to be polypropylene (OPP and CPP/BPP), while the biggest losses are predicted for OPET, OPA and aluminium.

These are some of the strategic findings of a brand new and in-depth analysis of the retort human food stand up pouch market and user sustainability mapping.

The report identifies drivers for the switch to recyclable RSUP as well as all the challenges in their adoption and food grade PCR incorporation, providing the most up to date and in-depth analysis of the progress in switching from a non-recyclable multi-layer RSUP to a recyclable one. In addition, it assesses the market for RSUP in Europe, covering historic and future size growth rates (until 2026), end use applications, distribution channels (retail vs food service), ownership (brand owners vs own labels) and key users. The report forecasts future development showing winners and losers in terms of new input materials, and maps, for the first time, the manufacturing footprint of all European RSUP users by location (115 plants) and by brand (214 brands).

The report and accompanying database are a 'must have' point of reference for all participants in this industry and market.

To learn more about Krolak Partners' report **'Retort Stand up Pouches, Europe - Market and User Sustainability Mapping to 2026'** visit our website page [LINK](#)

About Krolak Partners

Based in London, Krolak Partners is a management consulting firm providing a personalised and result-driven support to our clients who want to improve their present situation. We strongly believe in innovation and circularity as the two forces which should shape the growth strategy of our clients across the world.

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