



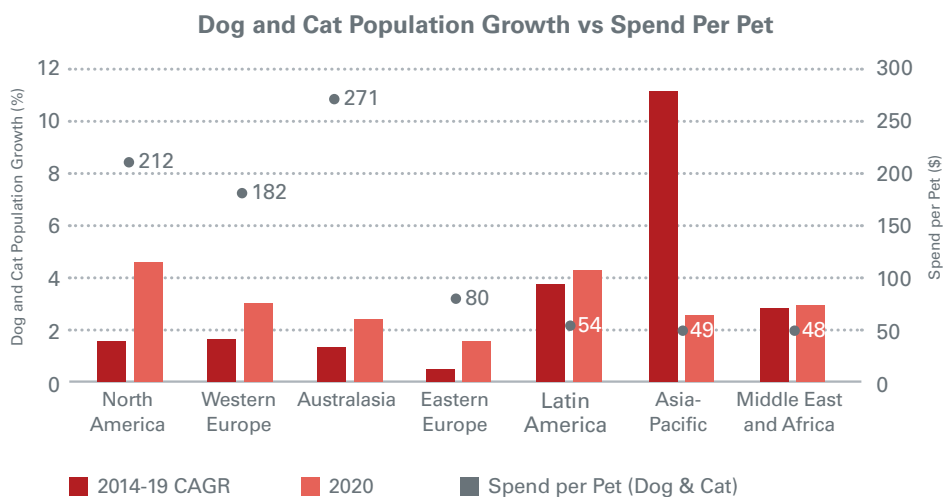
## Flexible Packaging for Pet Food

The best pet food solution requires the right expertise





## We know the scenario: More Pets in the Right Places



Source: Euromonitor International

The Pet Food industry is experiencing a robust growth, due, in part, to a pet adoption increase. The owners are also spending more, on average, on the keeping of their pets.

2020, in fact, revitalized pet population growth in developed markets, and saw a major pivot in ownership to higher income households.

The trend has continued in 2021, with the consolidation of the working habits of the families

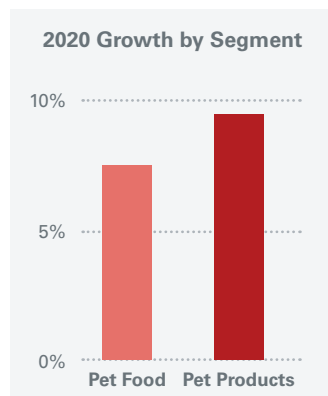
## The Pet Food growth

All of this, according to data shared by Euromonitor, has led to a 9% increase in Pet Products and, more specifically, an 8% increase in Pet Food, especially of premium products (9% increase), followed by mid-market and low-cost products.

Branded products have also seen a higher increase in their market share when compared with private label products.

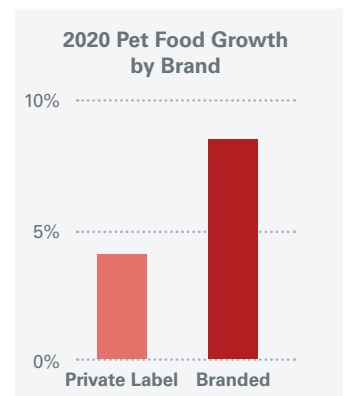
The spread of Pet Food products has been especially significant in high-income regions, such as US, Europe, and Japan.

### Pet Supplies



Source: Euromonitor International

### Private Label



Source: Euromonitor International

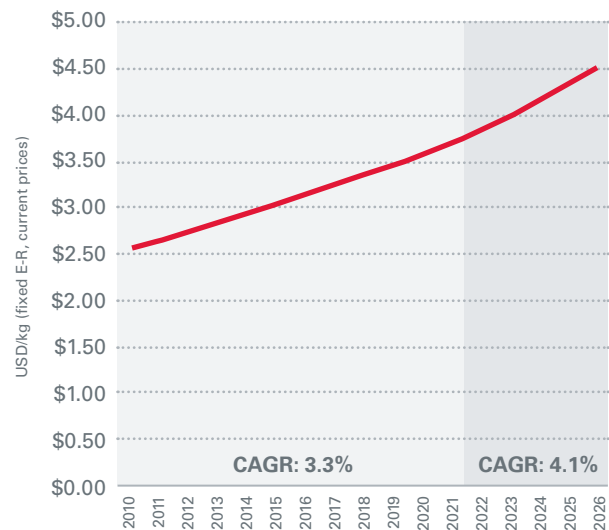
## Higher value products, higher profits for producers

The average cost of Pet Food products has experienced a compound annual growth rate (CAGR) of 3.3% in the last 10 years and is projected to grow by 4.1% in the next five years (2022-2026).

While in 2010 the average cost of a Pet Food product was \$2.5 USD, in 2026 the cost will reach \$4.5 USD.

Within the pet food industry, one of the highest growing segments is that of pouch packaging.

Global Dog and Cat Food: Average Unit Price, 2010-2026



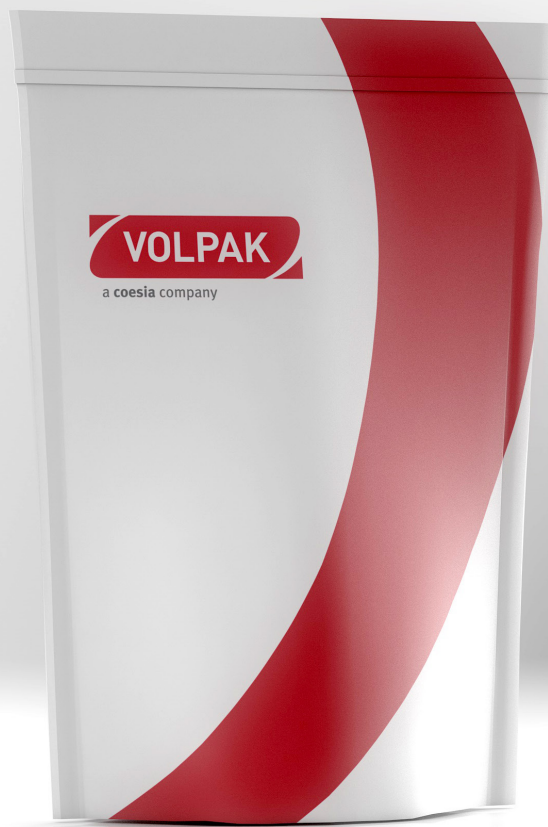
Source: Euromonitor International

## Pet food in pouches: practical and popular

This type of flexible packaging offers several advantages, such as convenience, a large capacity in relation to the size of packaging and, if produced with the correct materials, a long shelf life.

For this reason, it is the ideal choice for the packaging of dry products (kibble or treats), as well as semi-moist products (meat-based food), or liquids (soups).

Pouch packaging is usually made by "form fill seal" machines, which span all the stages, from forming to filling to hermetic sealing. These processes are critical: in the case of pet food, machines must dose the product with precision and handle it correctly during package forming and sealing, while meeting strict hygiene standards.



The pouch is one of the most widespread and popular flexible packaging solutions, even in the Pet Food industry





*The pouch filling stage requires extreme dosing precision*

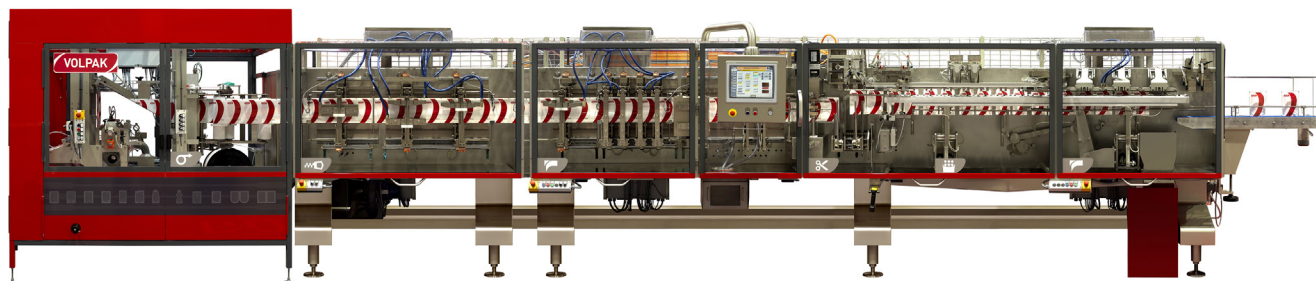
## Technological challenges

Once filled and sealed, the pouch doesn't usually need an overpackaging. Its very nature, however, makes it less stable than a box or a hard case, for instance. Moreover, in the case of nuggets or other wet food, the packaging is often full of thick liquids such as gels or seasoning sauces, which are still very hot after the filling and sealing stages.

This causes condensation on the outer surface of the pouches and generates humidity, which is another important factor when it comes to designing a suitable transportation method.

## 40 years of expertise in meeting the The Pet Food Industry needs

Volpak has the right expertise to effectively overcome these challenges, offering a wide portfolio of solutions, both for pre-made pouch packaging and form fill seal machines. For instance, in the case of liquid Pet Food packaging (typically meat with sauces), it's essential to be able to count on machines capable of guaranteeing the highest precision in the pouch forming and sealing stages, in addition to a careful handling of the packaging. These are mainly low-capacity pouches, usually around 200 ml, typically used for mid to high end packaging and products, sold predominately in developed markets.



*Si-440 is part of a series of machines that are especially suitable for Pet Food packaging*

## The best solution, for both dry and liquid products

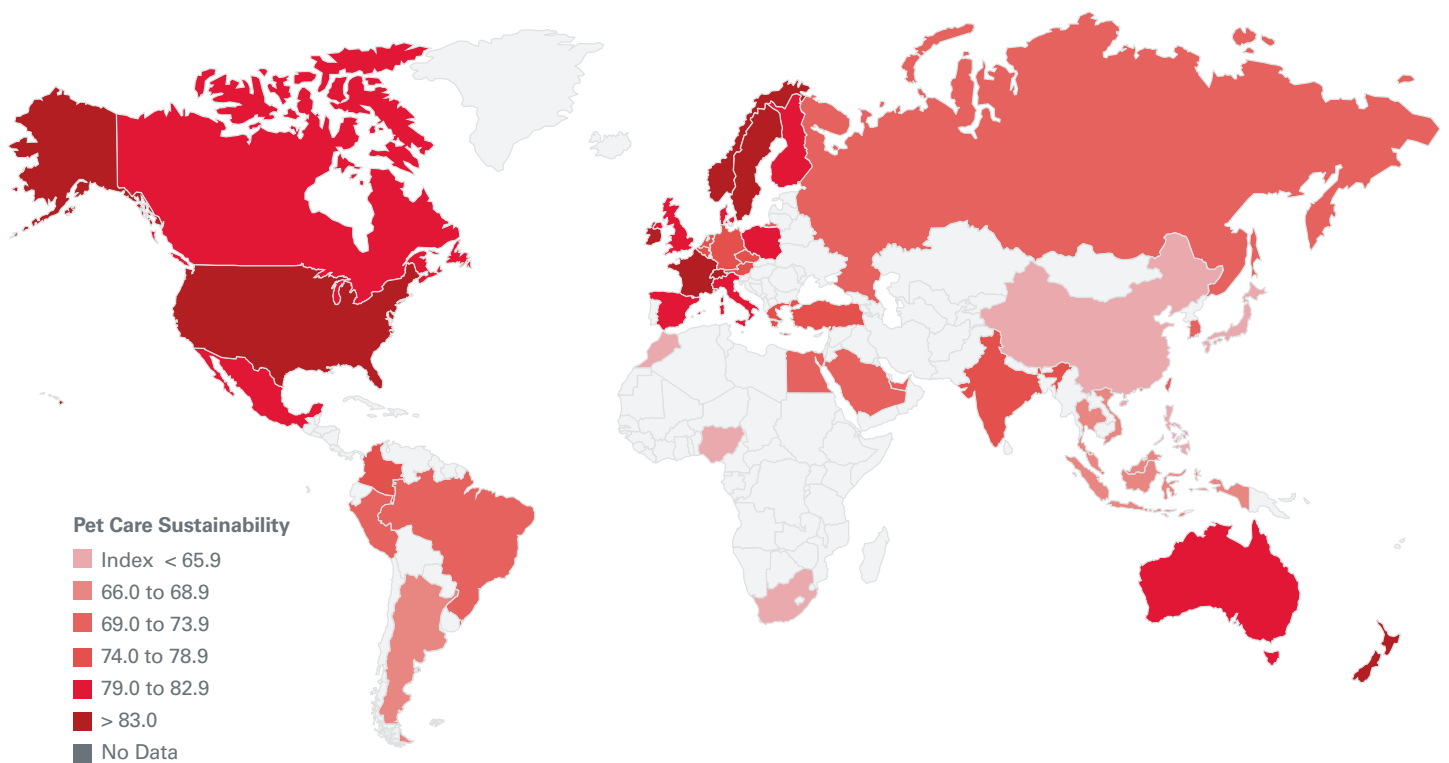
On the other hand, dry products, such as kibble, require machines that can work at high speeds and with large formats, half a kilo and above. These products are mainly aimed at the US market as well.

The specific solutions designed for “form fill seal” packaging also allow a more efficient offsetting of the initial investment, ensuring the same quality and characteristics of pre-formed packages - mostly used in Us & Asian markets - in terms of shelf-life. The reels of packaging material are less expensive than pre-formed pouches and allow to save material, which benefits the environment as well.

## Sustainability without sacrificing quality

Sustainability is, in fact, another important issue, especially in high-income regions such as the United States, Europe and Japan. When it comes to this issue, Volpak's machines can offer a competitive advantage since they can employ environmentally friendly mono-materials for the packaging stage. Pouches are also a convenient type of packaging in terms of layout, since there is no empty, unused space inside them. This also reduces transportation costs.

### Sustainability: Where to Play Index?



Source: Euromonitor International

## Uncompromising quality

All of this is possible without sacrificing quality: pouches made with Volpak's machines typically feature a double sealing system, the first one ensures an effective hermetic sealing and is produced by an ultrasound system, but this is not all.

To be more aesthetically appealing, Volpak's packaging also include a second sealing system, which is produced by a heat-sealing tool and serves mainly an aesthetic function.



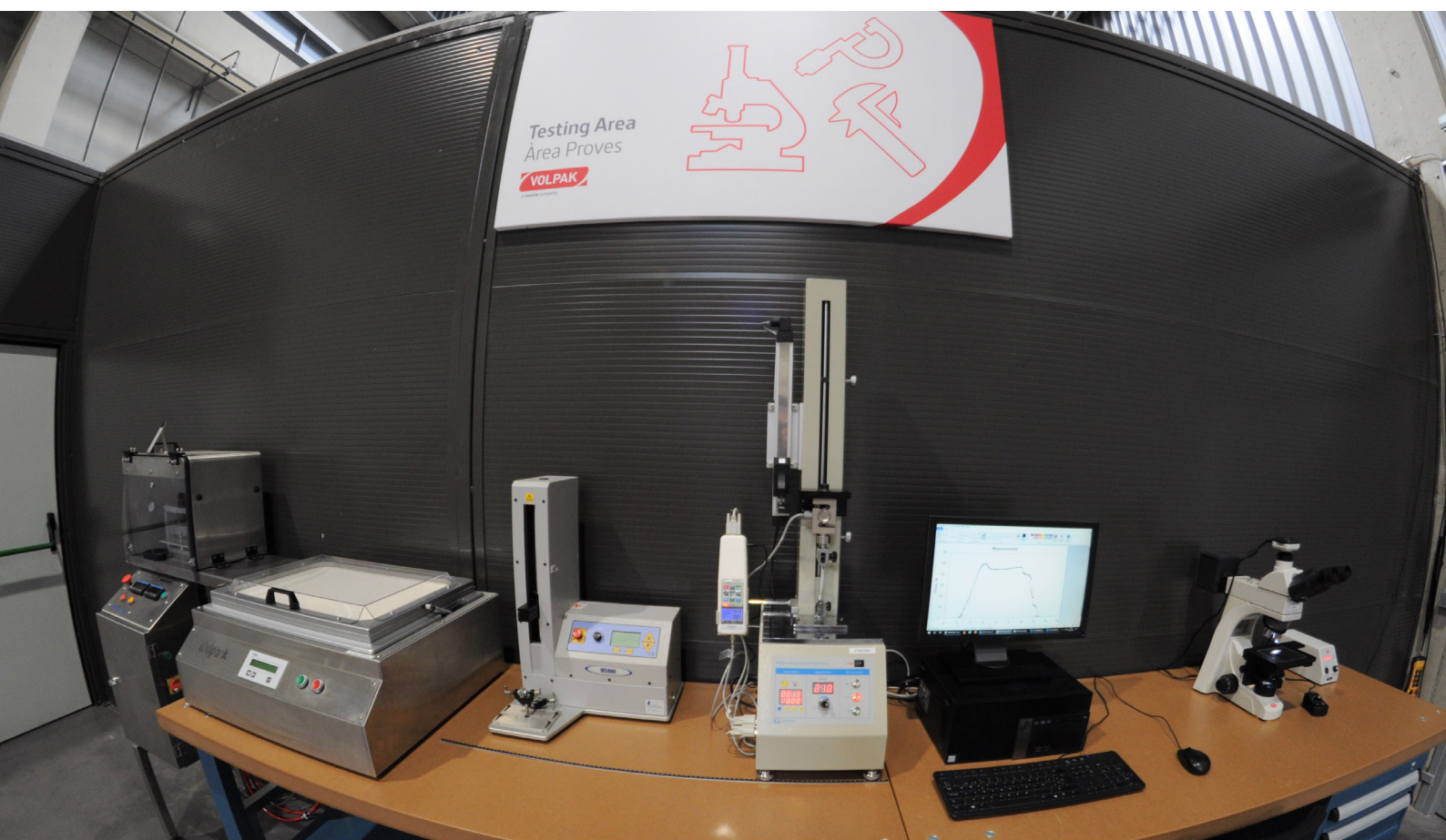
Volpak's machines can use environmentally friendly mono-materials





## The strength of a big industrial group at your service

Being part of the Coesia group enriches the company's know-how, as the Group brings further expertise also thanks to partnerships among its member companies. This environment allows Volpak to work in a predictive manner.



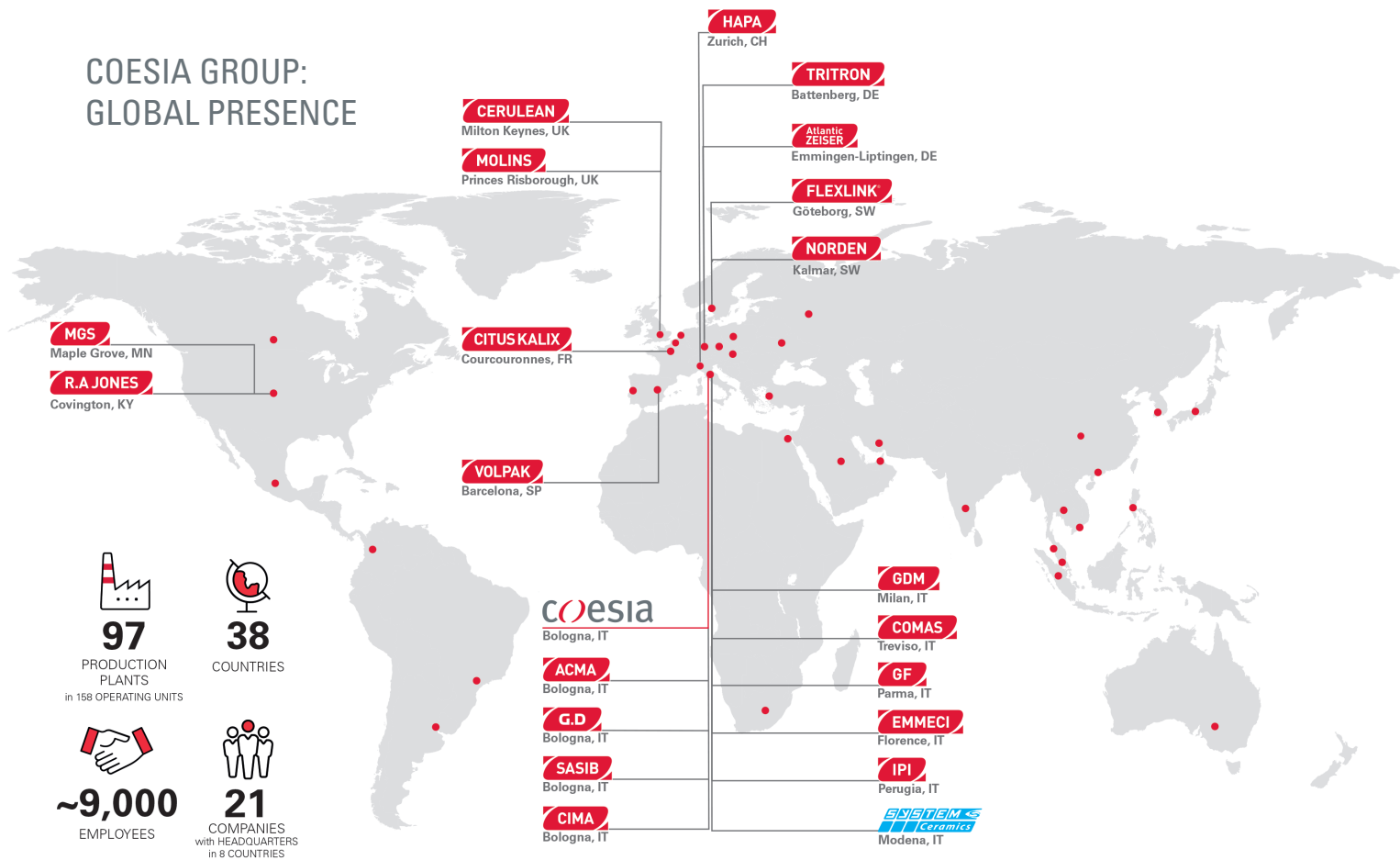
*Pouch Lab is the facility where new flexible packaging is tested and developed*

## Cutting-edge research

For example, when designing a pouch packaging line dedicated to pet food, the company can carry out specific tests before the final installation by simulating production conditions, and putting pouches into the same stress conditions that they may undergo during the actual process.

These tests are carried out at the "Pouch Lab", a research and development center at Volpak's headquarters. Here the company tests the mechanical resistance and behavior of pouches by using different materials and simulating different environmental conditions.

## COESIA GROUP: GLOBAL PRESENCE



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Coesia is a group of innovation-based industrial and packaging solutions companies operating globally, headquartered in Bologna, Italy.

Coesia's companies are leaders in the sectors of:

- Advanced automated machinery and packaging materials
- Industrial process solutions
- Precision gears



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