



MAKING REFILL MAINSTREAM

REFILL

THE LANDSCAPE TODAY

- WHAT, WHY, HOW?
- **LANDSCAPE TODAY**
- 3 PARADIGM SHIFTS
- 5 DRIVERS TO REFILL
- 5 BARRIERS TO REFILL.
- WIDER CONSIDERATIONS
- CONCLUSIONS



REFILL BEHAVIOUR IS NOT UNFAMILIAR

71%

of consumers say they are willing to try refilling their packaging

REFILLING PACKAGING HAS WIDESPREAD INTEREST

SO WHY DOES IT REMAIN SUCH A NICHE ACTIVITY?

REFILL

REMOVING REFILL BARRIERS

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BARRIERS TO REFILL

- 1 REMOVE THE REFILL PREMIUM**
Decouple refilling from premium eco brands.
- 2 DE-RISK THE REFILLING PROCESS**
Minimise fear of embarrassment and mistake.
- 3 DESIGN FOR MINIMUM AGENCY**
Refill involves many steps and high mental load → reduce as much as possible.
- 4 DESIGN FOR THE FAIL CASE**
When something goes wrong, avoid ejecting shoppers from the refill system.
- 5 MEET SHOPPERS WHERE THEY ARE**
Bring refill to where shoppers are → in mainstream retailers, amongst single-use options.

DRIVERS TO REFILL

- 1 LEVERAGE NOVELTY**
I love to try something new → make it interesting, attractive, premium.
- 2 CREATE OBJECTS OF DESIRE**
If packaging is to become a long-term houseguest, it should be an agreeable one.
- 3 HIGHLIGHT THE DISADVANTAGES OF SINGLE-USE**
Refills offer deliverance from the frustrations of single-use.
- 4 CREATE A MOVEMENT**
Foster positive social pressure by making refilling visible and desirable.
- 5 GIVE WAYS TO SAVE**
Everyone loves a bargain → reframe refills as a savvy choice.

REFILL

SHIFTING THE STATUS QUO

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1

PACKAGING IS WORTHLESS



IMBUE PACKAGING WITH VALUE AGAIN

We have been trained to see packaging as valueless, incidental and disposable. If we saw it as valuable with a future use, we may be less quick to throw it away.

2

RECYCLING IS THE ONLY ANSWER



PRIORITISE REUSE AND REDUCTION

Ever since the problem of waste dawned on us, messaging has focused on how to dispose of it correctly. We can never recycle as much as we produce. By the time we are recycling it, it's too late. We need to produce less.

3

CONVENIENCE IS EVERYTHING



REFILLING IS VALUABLE AND REWARDING

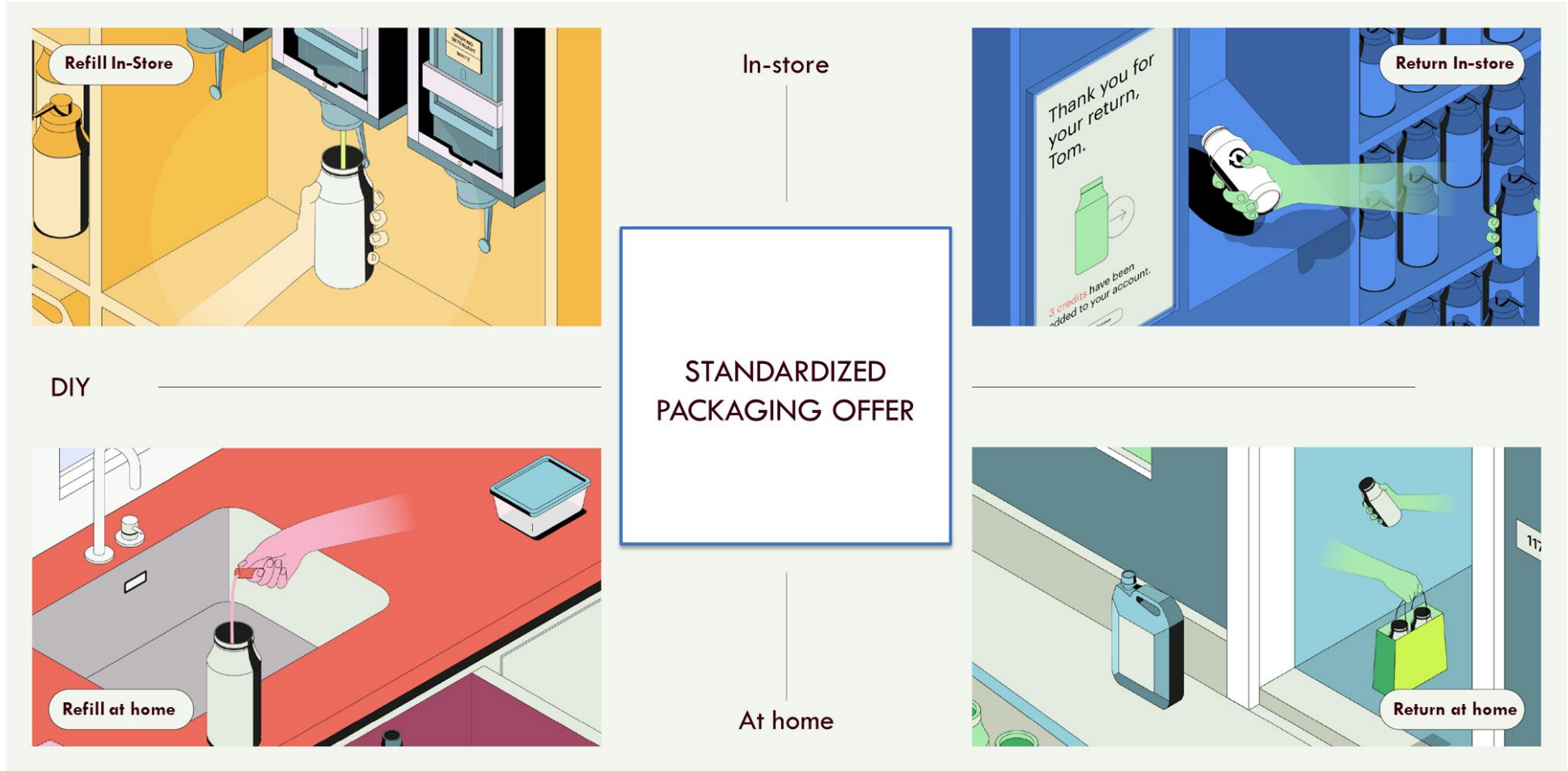
Innovation in the last hundred years has centred around making life faster and easier. Refilling will always have an extra step vs single-use, so we need to give the experience something that consumers value or find rewarding.



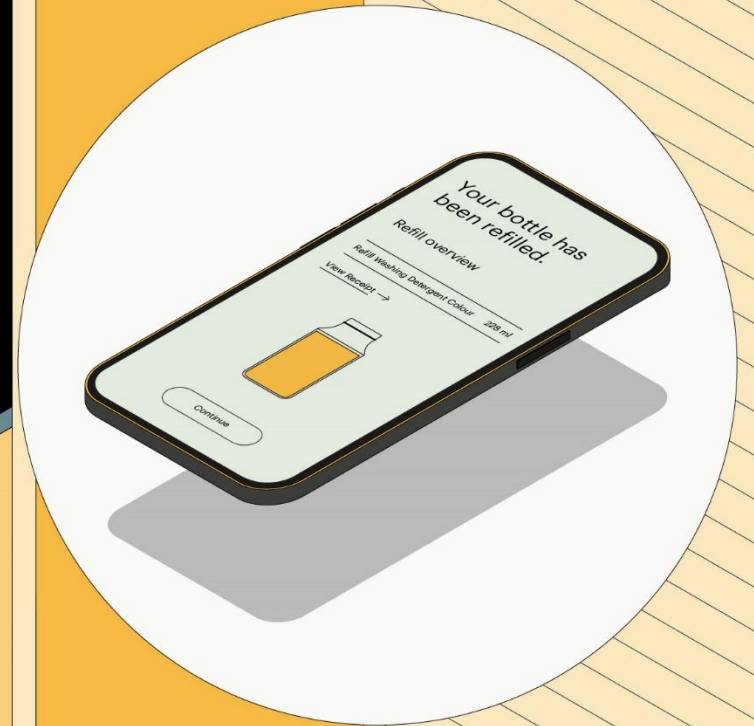
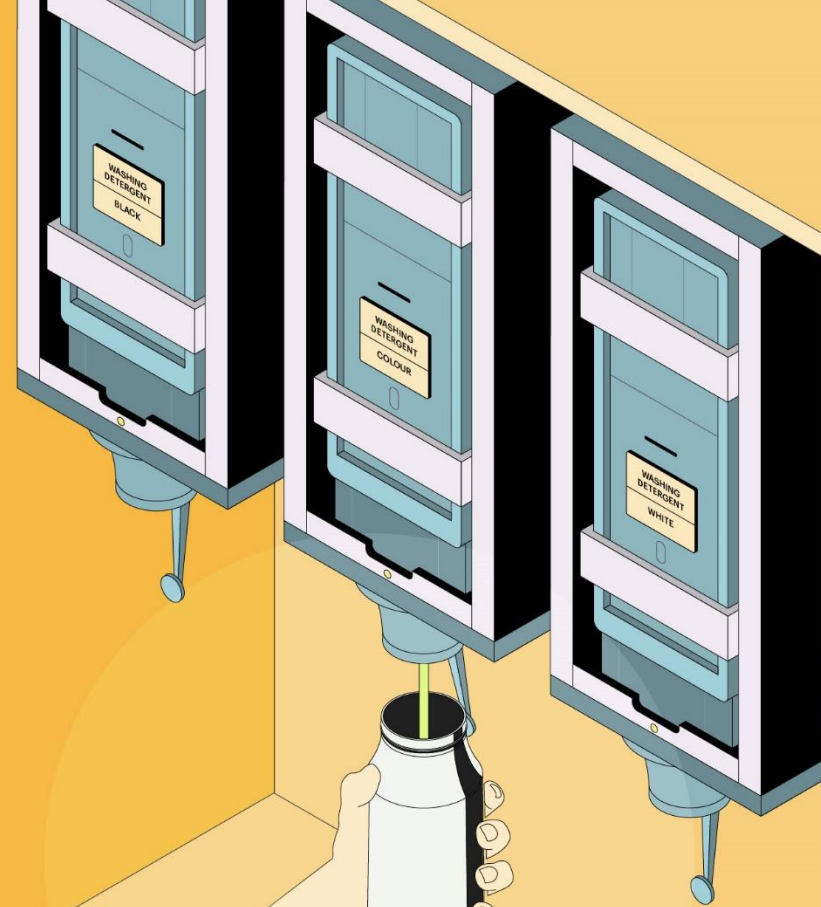
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In-store Refill: The Pack



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REUSE ECOSYSTEM

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PARTNERS ON THE JOURNEY



- ☹️ COST
- ☹️ STORESTAFF TIME
- ☹️ CUSTOMER JOURNEY
- ☹️ CONTAMINATION
- ☹️ LABELLING
- ☹️ FLEXIBILITY



- 😊 COST
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- 😊 CUSTOMER JOURNEY
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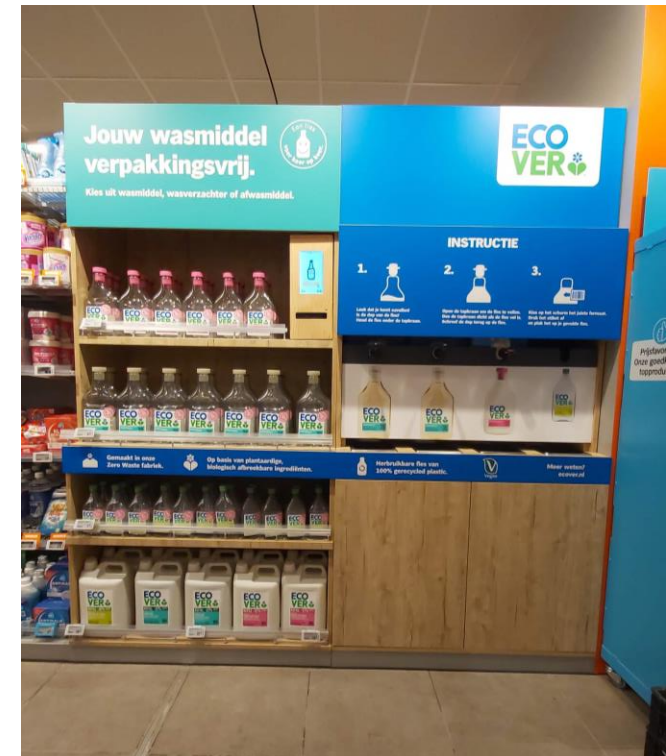
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ONE IoT platform, ONE user interface, ALL liquids in store

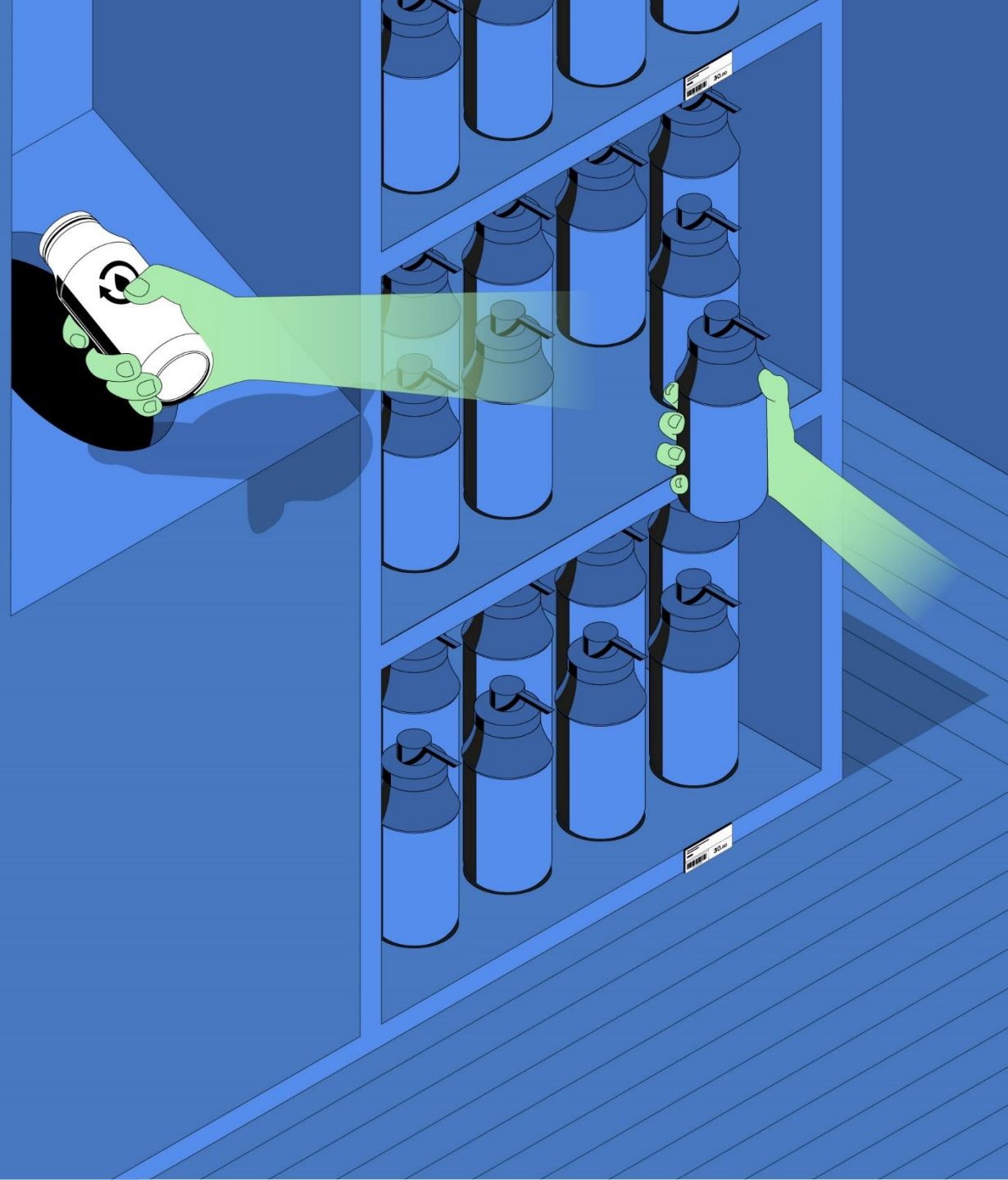
Generic Liquid Platform
No risk of contamination (single use pumps, no piping)

FOOD &
BEVERAGE

PERSONAL
CARE

HEALTHCARE

In-store Return



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PREFILLED MODEL TO GO MAINSTREAM

Join the Re revolution

ReRe is a borrow anywhere, return anywhere, reuse anywhere alternative to single-use packaging.

ReRe enables brands, retailers/locations and consumers to switch due to our:

1. Nationwide network of return points & washing facilities
2. Low cost, standardized, smart, leased packaging-as-a-service with lower carbon emissions
3. Whole-system collaborative approach with a consumer behaviour change focus

THANK YOU

QUESTIONS?
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