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The twin transition in plastic packaging

# Green & Digital

October 18th and 19th, 2023

# Market and Consumer Trends in Packaging

**Dominic Cakebread**

Global Packaging Services Director

GlobalData Plc

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# Global Consumer Packaging Trends & Drivers, 2023 – 2027

A presentation for SACMI Green & Digital

Imola, 18 October 2023

# Speaker

**Dominic Cakebread**

**Director of Global Packaging Services**

Dominic heads up GlobalData's international packaging operations. He has over 40 years' experience in international marketing research and consultancy, specialising primarily in the analysis and forecasting of packaging markets.

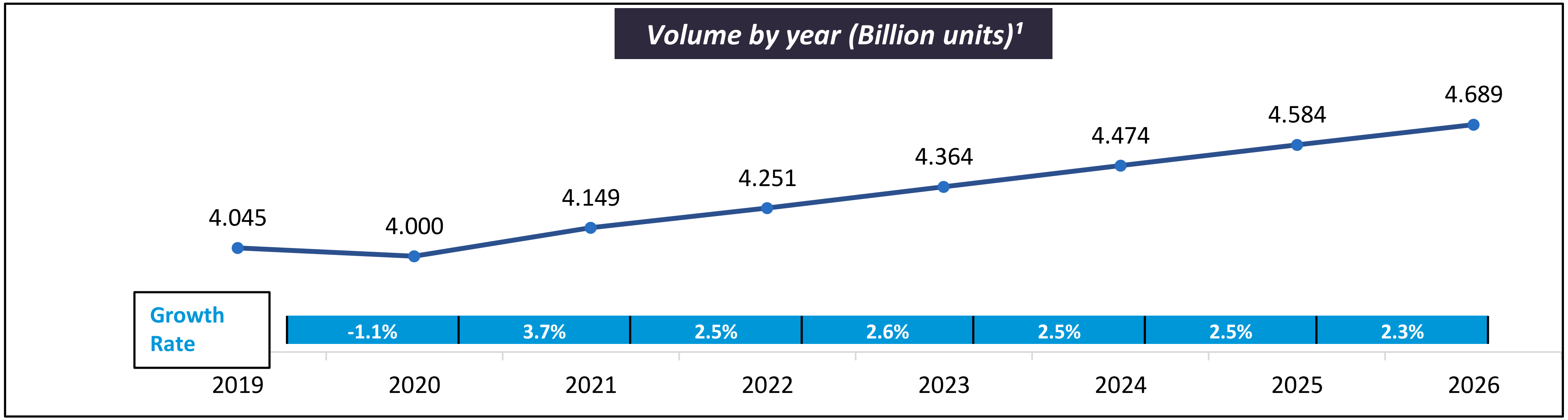
Dominic was closely involved in the design and creation of GlobalData's packaging market analyzers in 2011 and has undertaken consulting projects for most major packaging companies and some of their customers worldwide.

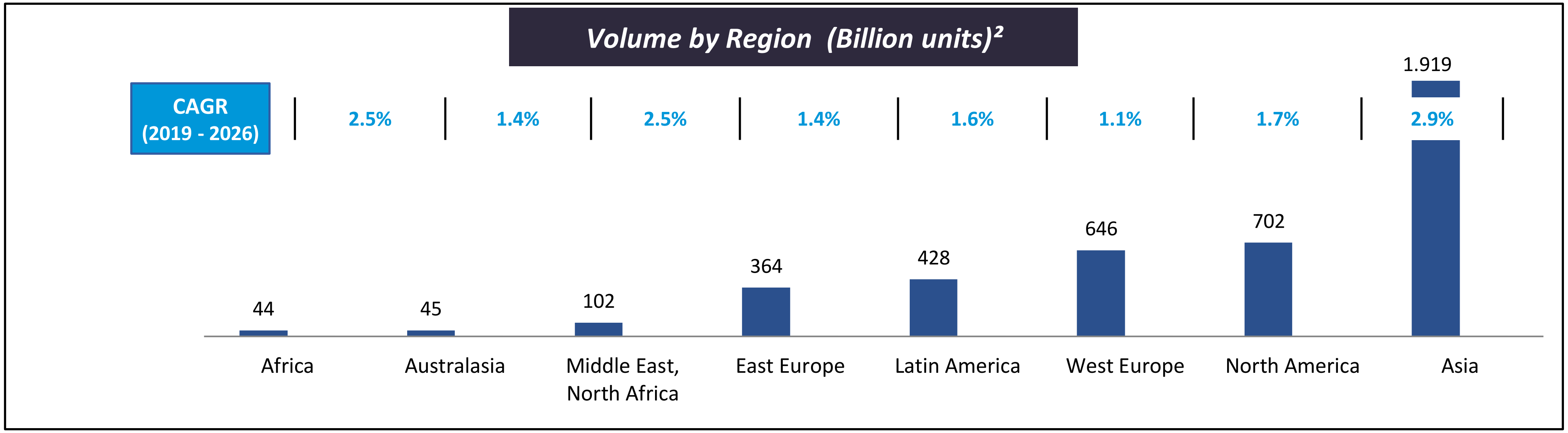
# Agenda

# Global Market Overview

# Global Market Overview - Consumer Packaging Market by Region

**Asia leads in size and growth a post-pandemic market adjusting to the new normal**

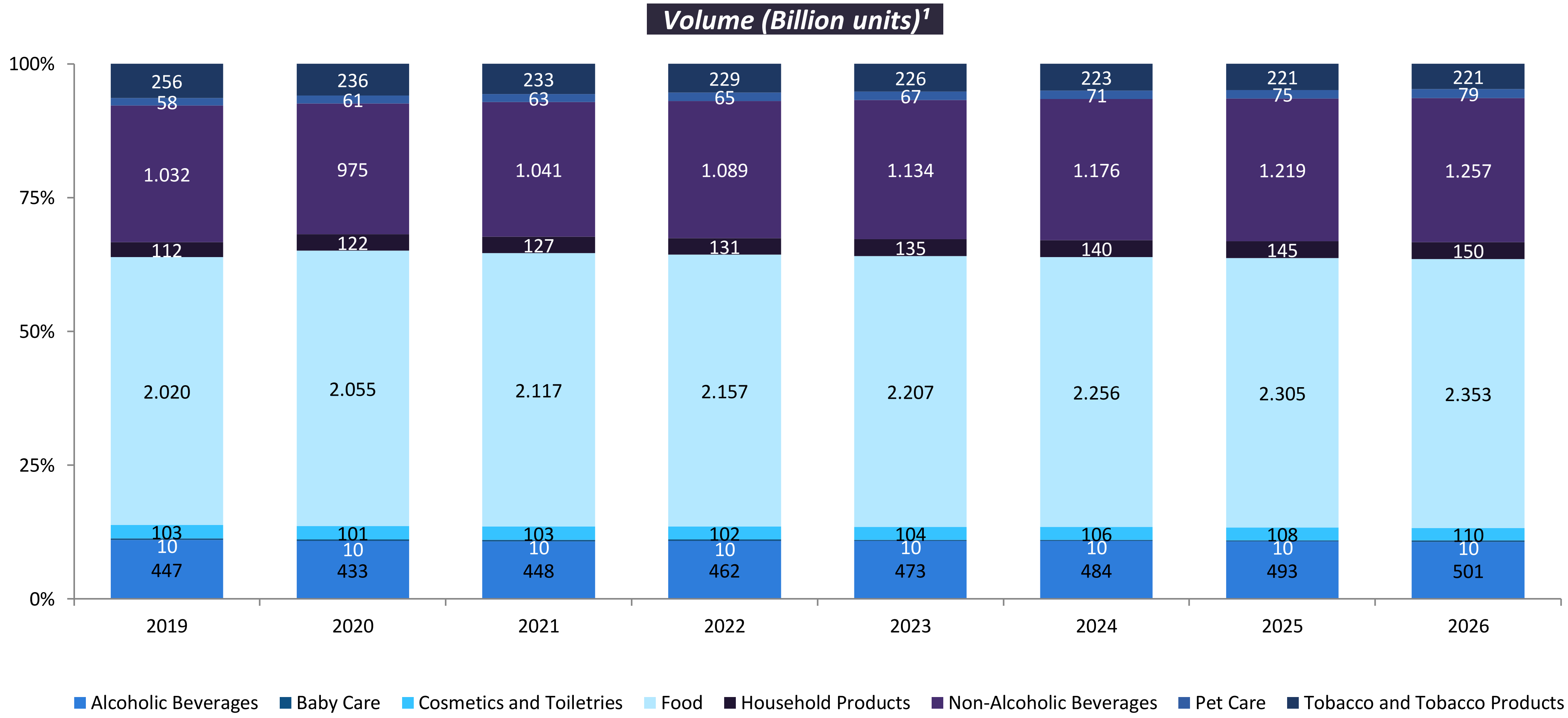



Source: [1] GlobalData Primary Packaging Market Analyzer

# Global Market Overview – Consumer Packaging Market by Sector

**Food, alcoholic, and non-alcoholic beverages will continue to lead the way in market share through 2026**

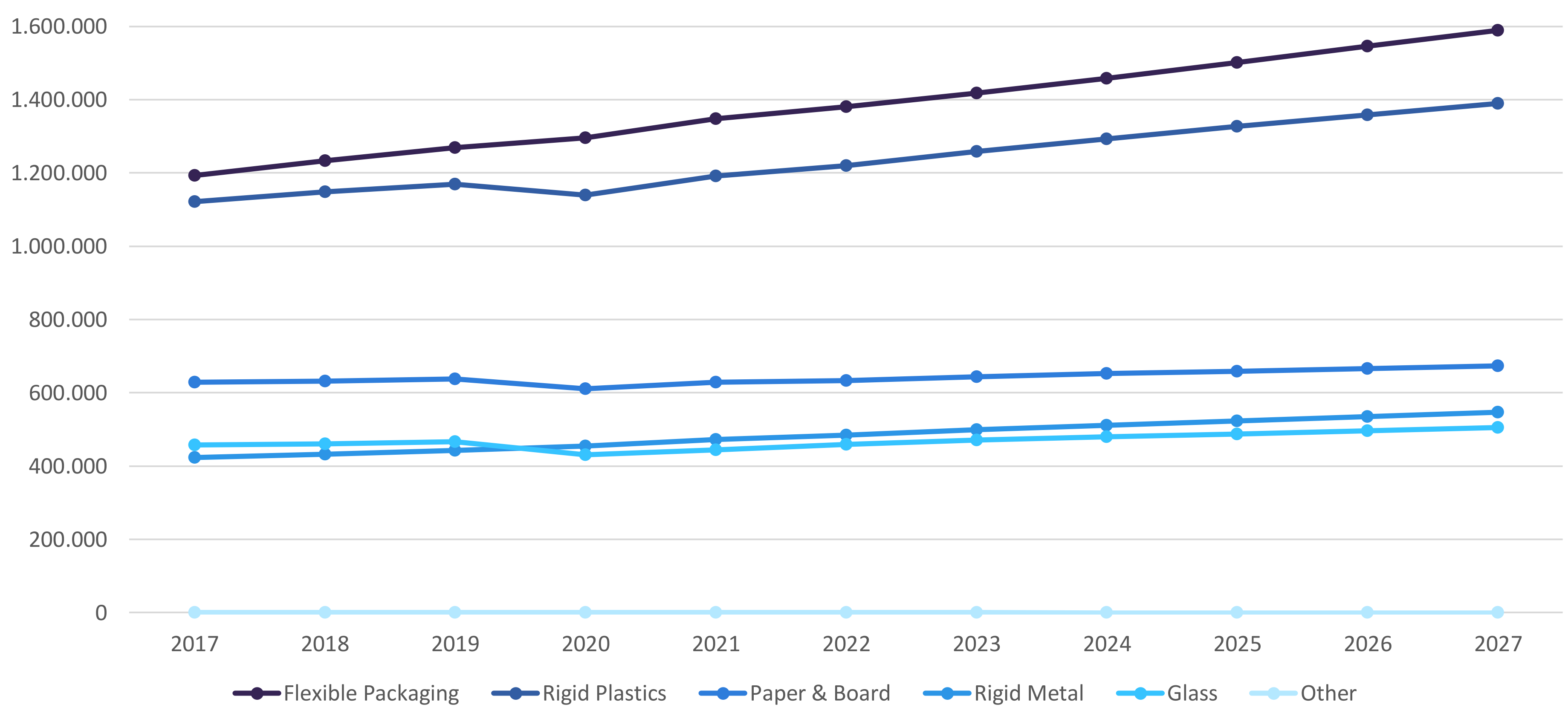



Source: [1] GlobalData Primary Packaging Market Analyzer

# Global Market Overview – Trends in Consumer Packaging Materials

At global level packaging material trends show growth across the spectrum, Flexible packaging still leads, but is threatened by more stringent regulations and a need to innovate

**Primary packaging and outers volume, Global Consumption by pack material, M Pack Units, 2017–27[1]**




Source: [1] GlobalData Packaging Market Analyzer

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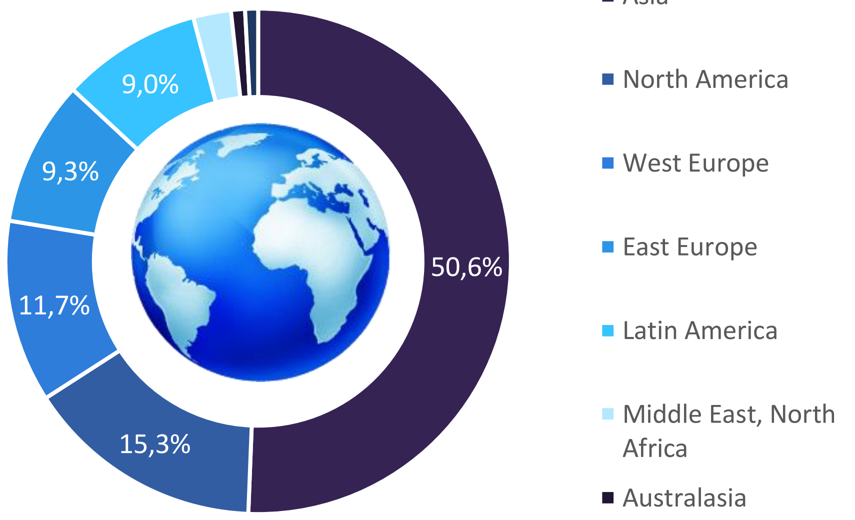
# Global Market Overview - Flexible Packaging Trends

Emerging markets' impact through flexible packaging's cheapness and convenience is reflected globally

### Flexible Packaging, Global Share by Region, M Pack Units,2022[1]




### Flexible Packaging by Industry Sector, M Pack Units, 2017-2027[1]

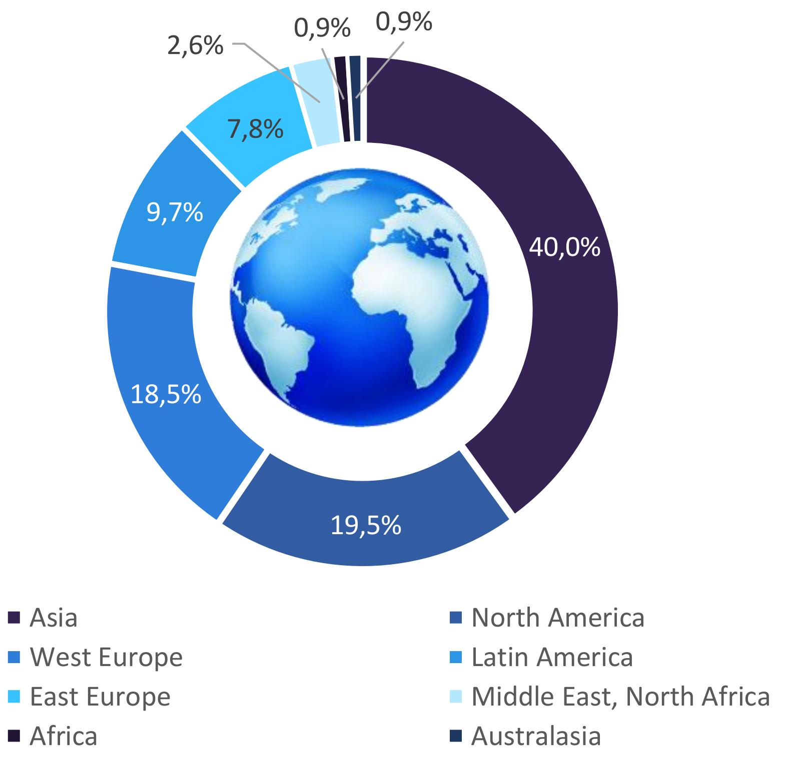
| | 2017 | 2020 | 2022 | 2027 | CAGR 2017-22 | CAGR 2022-27 |
|---|---|---|---|---|---|---|
| Alcoholic Beverages | 22 | 30 | 36 | 58 | 10.3% | 10.2% |
| Baby Care | 5,332 | 5,319 | 5,322 | 5,399 | 0.0% | 0.3% |
| Cosmetics and Toiletries | 43,170 | 45,386 | 47,115 | 52,104 | 1.8% | 2.0% |
| Food | 990,747 | 1,085,987 | 1,151,704 | 1,314,098 | 3.1% | 2.7% |
| Hot Drinks | 36,343 | 41,343 | 42,988 | 51,537 | 3.4% | 3.7% |
| Household Care | 36,103 | 39,704 | 42,206 | 46,401 | 3.2% | 1.9% |
| Pet Care | 11,582 | 13,254 | 14,344 | 16,755 | 4.4% | 3.2% |
| Soft Drinks | 66,256 | 62,359 | 74,457 | 100,735 | 2.4% | 6.2% |
| Tobacco and Tobacco Products | 3,774 | 2,972 | 2,747 | 2,628 | -6.2% | -0.9% |
| **Total** | **1,193,328** | **1,296,353** | **1,380,919** | **1,589,714** | **3.0%** | **2.9%** |

Source: [1] GlobalData Packaging Market Data, June 2023;

# Global Market Overview - Rigid Plastics Packaging Trends

Asia leads the rigid plastics market, creating challenge for sustainability due to proliferation of single-use format

**Rigid Plastic Packaging, Global Share by Region, M Pack Units, 2022[1]**




**Rigid Plastic Packaging by Industry Sector , M Pack Units, 2017-2027[1]**

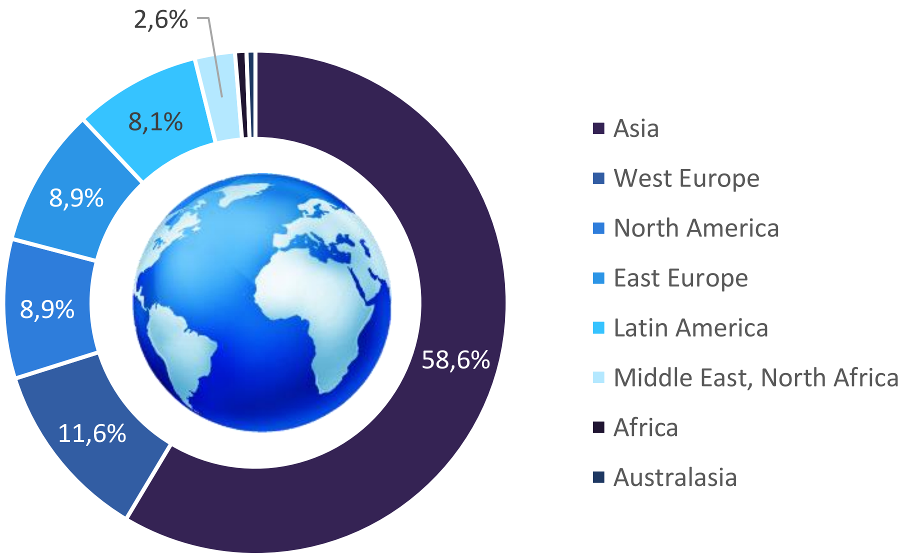
| Industry | 2017 | 2020 | 2022 | 2027 | CAGR 2017-22 | CAGR 2022-27 |
|---|---|---|---|---|---|---|
| Alcoholic Beverages | 8,463 | 8,804 | 8,428 | 9,496 | -0.1% | 2.4% |
| Baby Care | 977 | 927 | 913 | 895 | -1.3% | -0.4% |
| Cosmetics and Toiletries | 40,270 | 40,134 | 41,018 | 44,761 | 0.4% | 1.8% |
| Food | 506,583 | 526,383 | 541,342 | 597,469 | 1.3% | 2.0% |
| Hot Drinks | 4,258 | 5,222 | 5,396 | 5,936 | 4.8% | 1.9% |
| Household Care | 16,588 | 18,227 | 19,493 | 21,960 | 3.3% | 2.4% |
| Paints & Stains | 1,711 | 1,880 | 2,009 | 2,370 | 3.3% | 3.4% |
| Pet Care | 2,444 | 2,666 | 2,814 | 3,097 | 2.9% | 1.9% |
| Soft Drinks | 540,580 | 534,933 | 599,025 | 703,666 | 2.1% | 3.3% |
| **Total** | **1,121,874** | **1,139,176** | **1,220,438** | **1,389,650** | **1.7%** | **2.6%** |

Source: [1] GlobalData Packaging Market Data, June 2023

# Global Market Overview - Paper & Board Packaging Trends

Regionally, Asia is the definitive global market for the material

**Paper & Board Packaging, Global Share by Region, M Pack units, 2022[1]**




**Paper & Board Packaging by Industry Sector, M Pack Units, 2017-2027[1]**

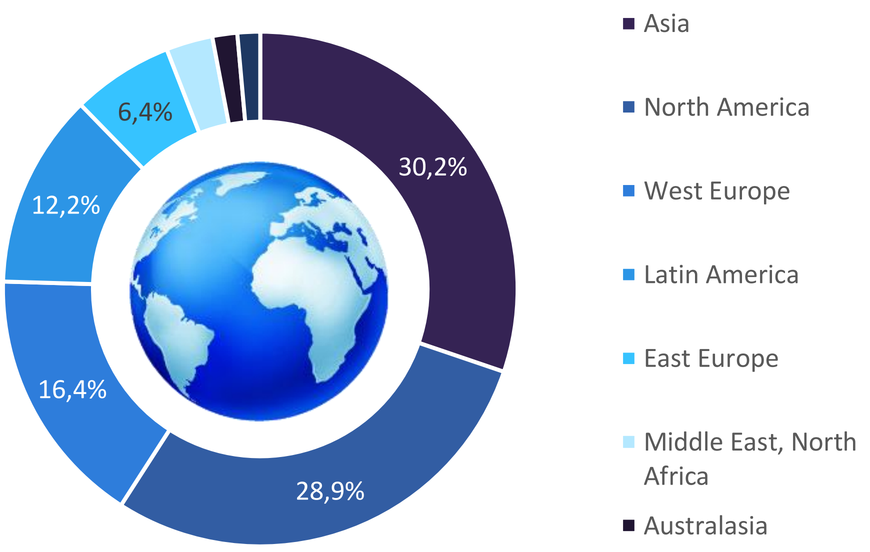
| Industry | 2017 | 2020 | 2022 | 2027 | CAGR 2017-22 | CAGR 2022-27 |
|---|---|---|---|---|---|---|
| Alcoholic Beverages | 2,037 | 2,005 | 2,120 | 2,542 | 0.8% | 3.7% |
| Baby Care | 272 | 266 | 257 | 257 | -1.1% | 0.0% |
| Cosmetics and Toiletries | 6,783 | 7,085 | 7,262 | 7,870 | 1.4% | 1.6% |
| Food | 263,007 | 272,936 | 283,560 | 314,336 | 1.5% | 2.1% |
| Hot Drinks | 19,369 | 22,644 | 23,453 | 26,978 | 3.9% | 2.8% |
| Household Care | 9,451 | 10,270 | 10,804 | 11,765 | 2.7% | 1.7% |
| Pet Care | 1,087 | 1,242 | 1,338 | 1,584 | 4.2% | 3.4% |
| Soft Drinks | 65,802 | 62,072 | 68,727 | 77,332 | 0.9% | 2.4% |
| Tobacco Products | 261,280 | 232,734 | 235,265 | 230,169 | -2.1% | -0.4% |
| **Total** | **629,086** | **611,253** | **632,785** | **672,832** | **0.1%** | **1.2%** |

Source: [1] GlobalData Packaging Market Data, June 2023

# Global Market Overview - Metal Packaging Trends

Asia, North-America, and Europe drive the metal packaging market

**Rigid Metal Packaging, Global Share by Region, M Pack units, 2022[1]**




**Metal Packaging by Industry Sector M Pack Units, 2017-2027[1]**

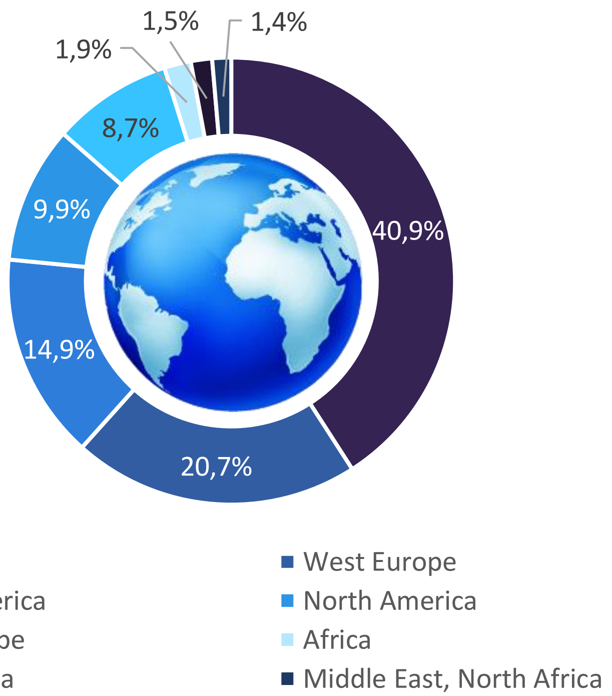
| Industry | 2017 | 2020 | 2022 | 2027 | CAGR 2017-22 | CAGR 2022-27 |
|---|---|---|---|---|---|---|
| Alcoholic Beverages | 139,623 | 160,165 | 172,154 | 194,525 | 4.3% | 2.5% |
| Baby Care | 1,136 | 1,122 | 1,116 | 1,115 | -0.4% | 0.0% |
| Cosmetics and Toiletries | 4,098 | 4,182 | 4,368 | 4,994 | 1.3% | 2.7% |
| Food | 95,764 | 97,286 | 101,026 | 111,088 | 1.1% | 1.9% |
| Hot Drinks | 3,850 | 4,753 | 4,951 | 5,615 | 5.2% | 2.5% |
| Household Care | 2,719 | 2,918 | 3,087 | 3,366 | 2.6% | 1.8% |
| Pet Care | 3,414 | 3,975 | 4,360 | 5,120 | 5.0% | 3.3% |
| Soft Drinks | 168,165 | 175,572 | 188,447 | 214,950 | 2.3% | 2.7% |
| Tobacco Products | 314 | 283 | 262 | 247 | -3.6% | -1.2% |
| **Total** | **419,083** | **450,256** | **479,771** | **541,020** | **2.7%** | **2.4%** |

Source: [1] GlobalData Packaging Market Data, June 2023

# Global Market Overview - Glass Packaging Trends

Emerging consumption-heavy regions are playing a key role in glass's opportunity today and the future

**Glass Packaging, Global Share by Region, M Pack Units, 2022**[1]



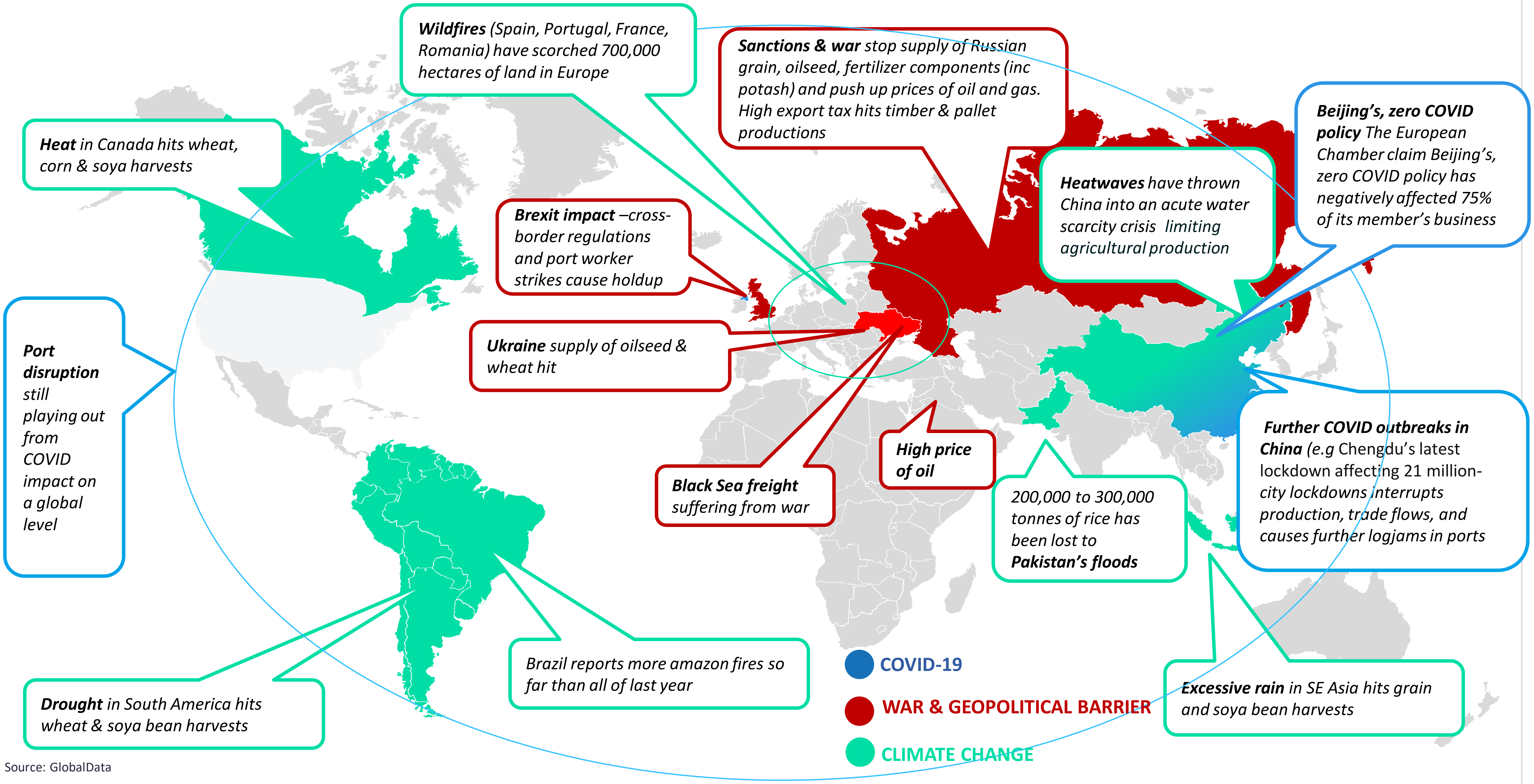

**Glass Packaging, by pack type, millions of pack units, 2017-2027**

| Pack Type | 2017 | 2020 | 2022 | 2027 | CAGR 2017-22 | CAGR 2022-27 |
|---|---|---|---|---|---|---|
| Bottle | 402,780.6 | 372,226.2 | **399,232.3** | 437,611.4 | -0.2% | 1.9% |
| Bubble Top | 0.4 | 0.2 | **0.2** | 0.2 | -11.4% | 1.1% |
| Cup | 4.0 | 4.9 | **5.9** | 7.9 | 7.9% | 6.0% |
| Demijohn | 6.3 | 6.0 | **6.5** | 7.0 | 0.5% | 1.5% |
| Jar | 51,859.3 | 55,964.9 | **58,521.5** | 65,870.2 | 2.4% | 2.4% |
| Other Pack Type | 26.3 | 24.2 | **24.3** | 25.5 | -1.6% | 1.0% |
| Specialty Container | 2,433.7 | 2,238.8 | **1,769.7** | 1,205.9 | -6.2% | -7.4% |
| **Glass Total** | **457,111** | **430,465** | **459,560** | **504,728** | **0.1%** | **1.9%** |

Source: [1] GlobalData Packaging Market Data, June 2023

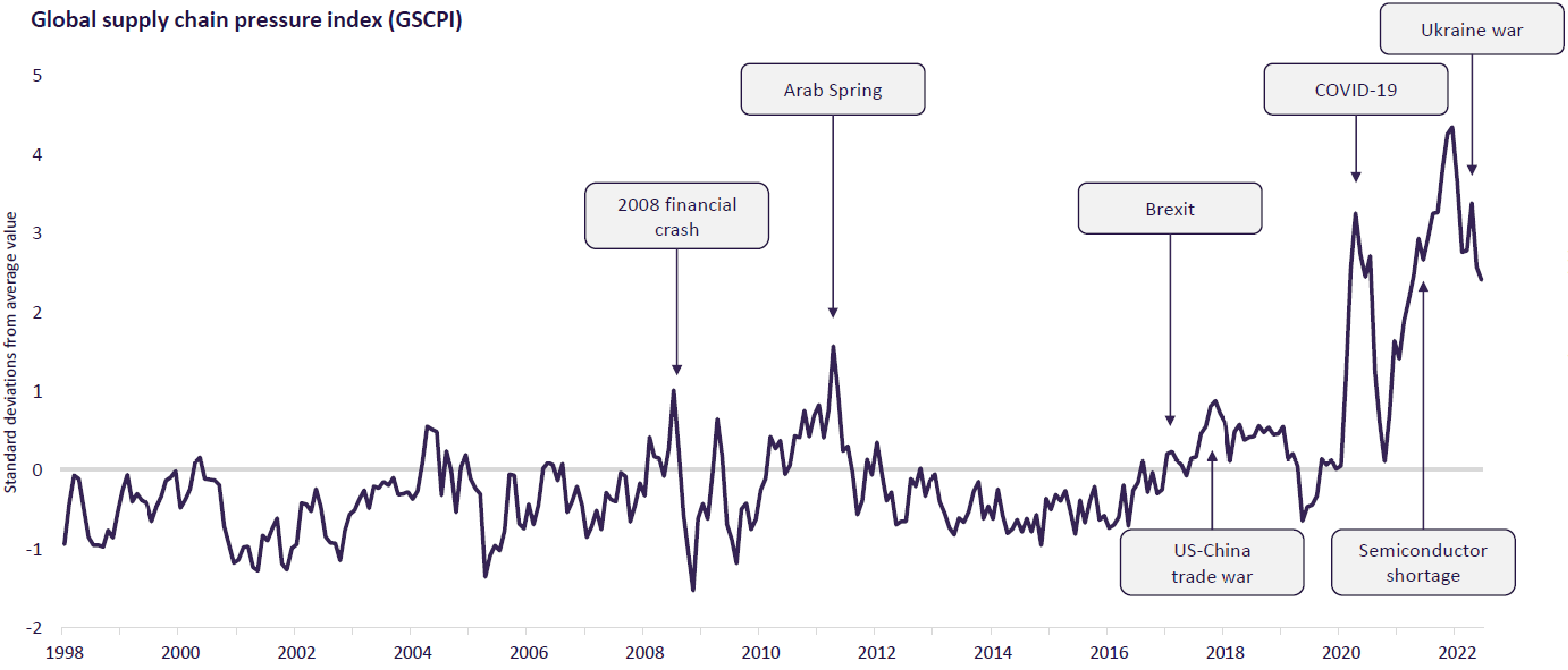
# Supply & Demand Challenges

# The Perfect Storm – 2022/3 plagued by droughts, war, COVID and political turmoil




Source: GlobalData

# The speed of shocks is speeding up, making supply chain management even tougher




Source: Federal Reserve Bank of New York, Global Supply Chain Pressure Index

# Three key drivers impacting the current trends the global packaging industr

Key Industry Drivers

Cost | Sustainability | Efficiency

Key Industry Trends

THE ESSENTIALS


## 1. Inflation

- Inflation rate

-Disposable income

- Interest rates

## 2. Environment

Environmental policies

- Climate change

## 3. Digitalization

-Technological awareness

- Innovation level

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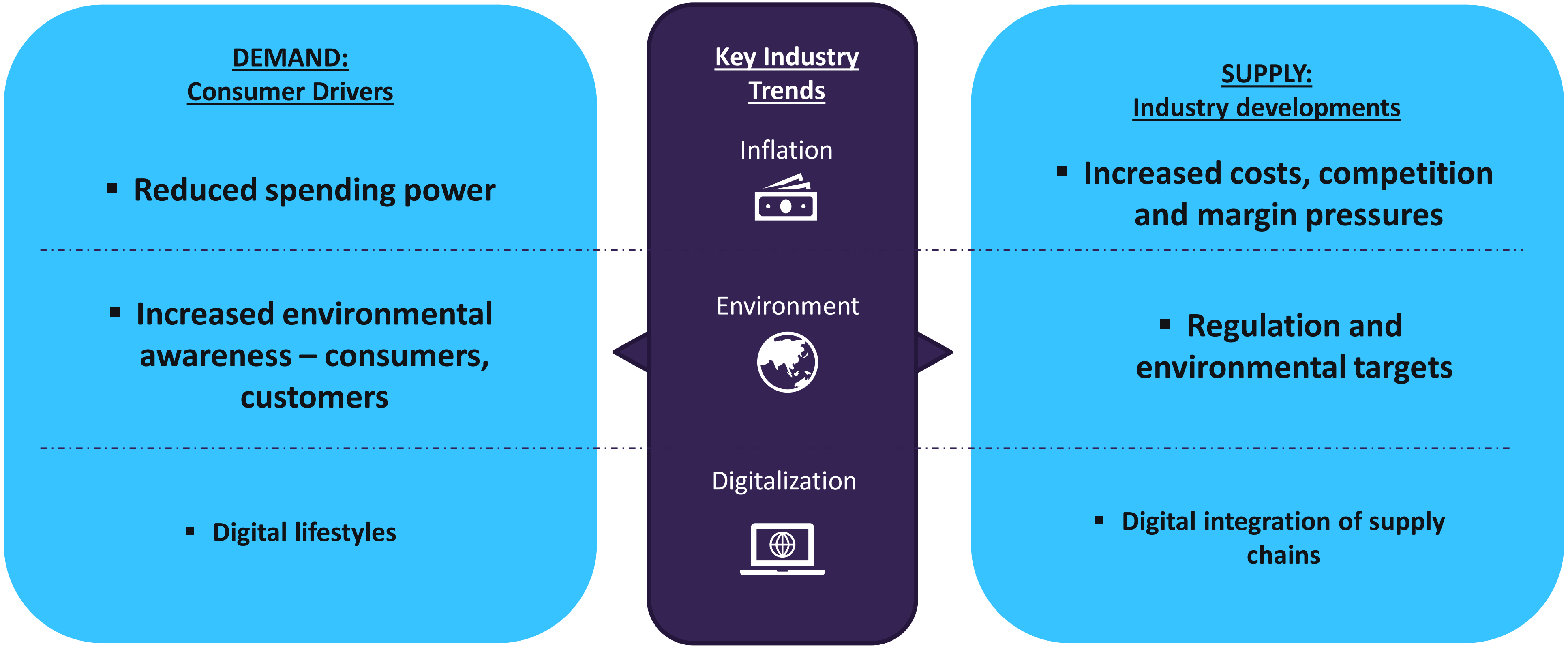
# Both consumer and supply-side developments affected by these three trends

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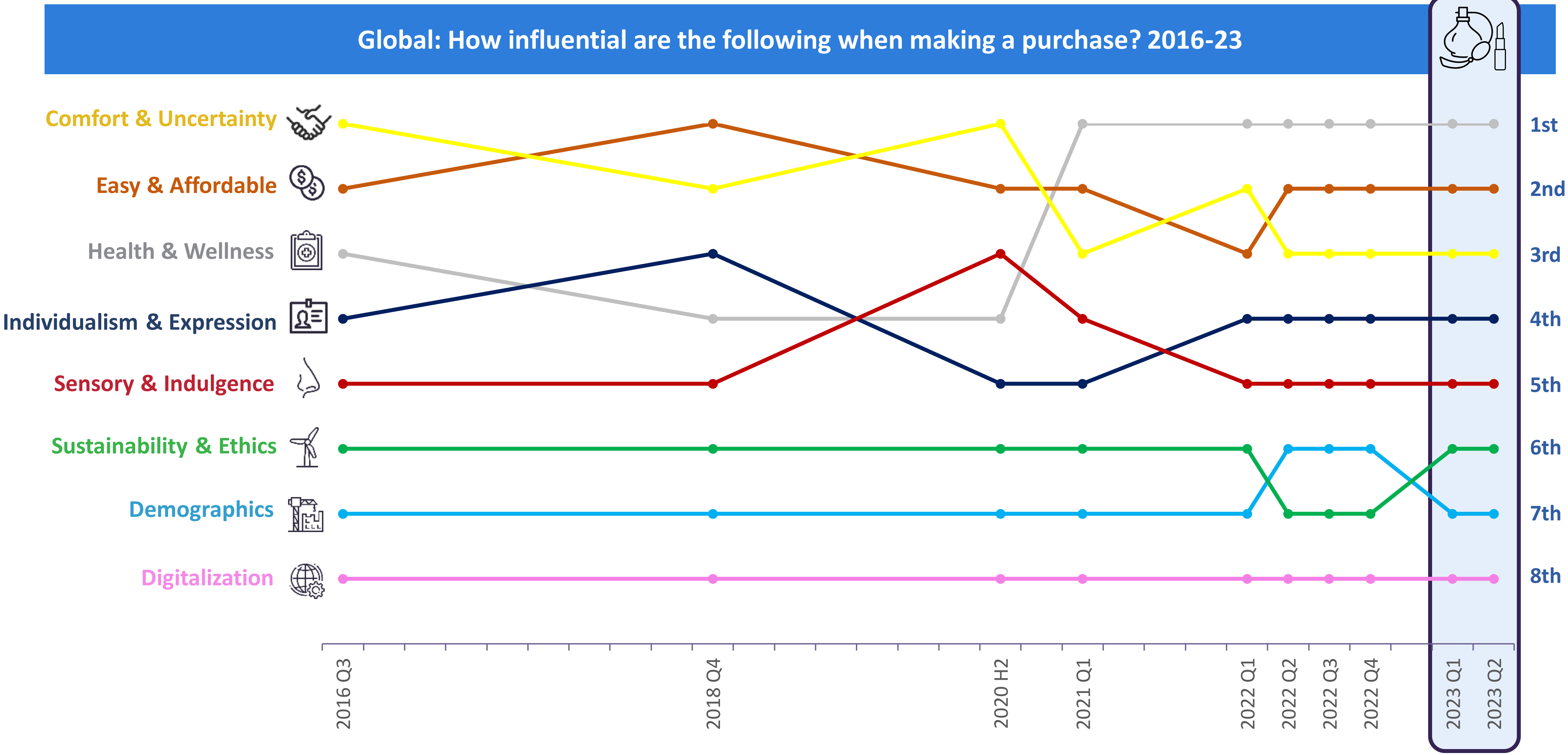
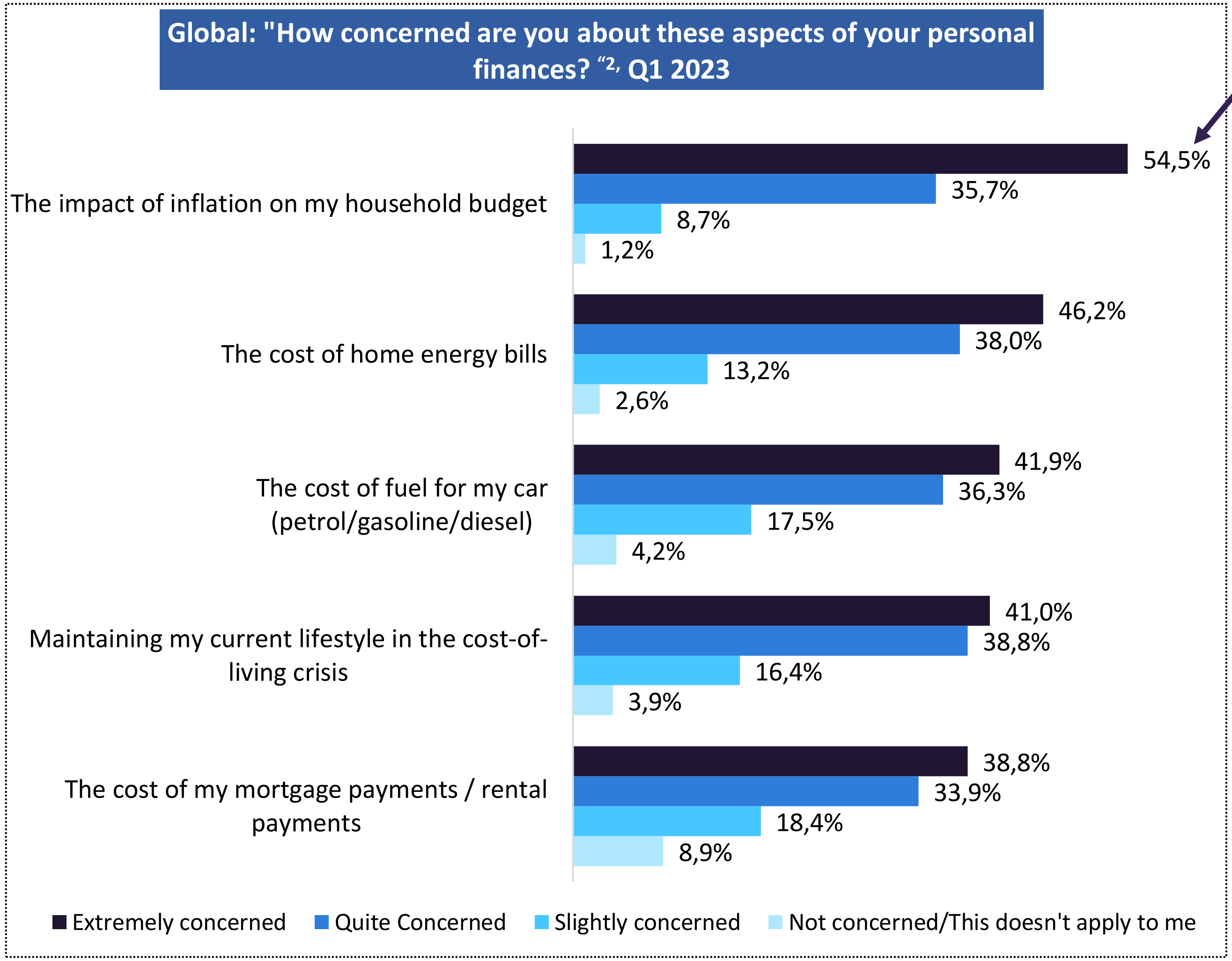
# Inflation

# Easy & Affordable is the second most influential GlobalData theme in 2023




Source: GlobalData's Global Consumer Surveys from 2016-23. Data from all years is relevant to purchases across the FMCG space, except 2023, which is relevant to health and beauty purchases only.
Ranking is based on the percentage of respondents saying they 'always' make purchasing decisions based on this factor.

# Rising costs and inflation have become consumers' key concern




55% of global consumers are **EXTREMELY CONCERNED** about the impact of inflation on their household budget.

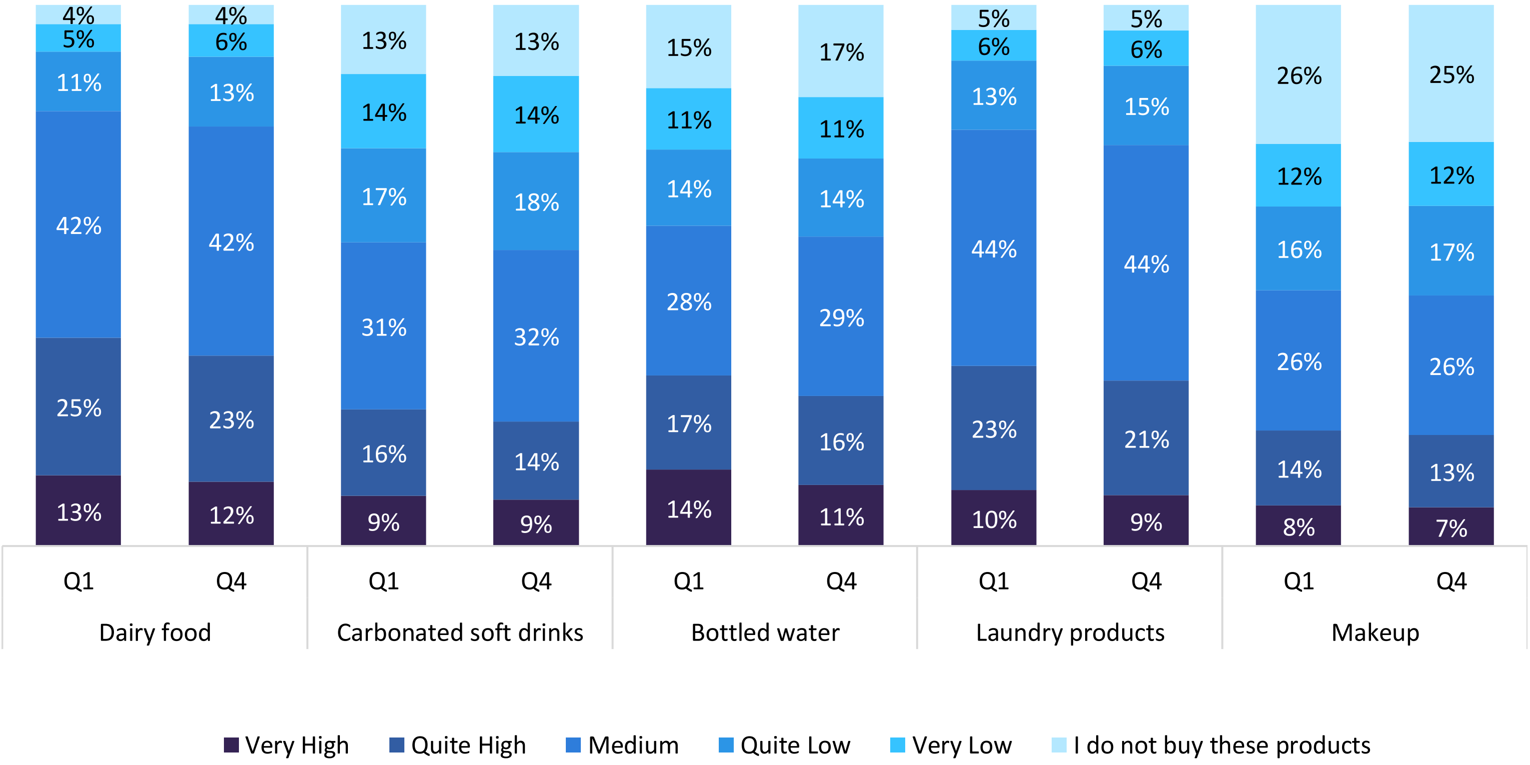
- Cost-conscious consumers are increasingly seeking cheaper alternatives, impacting the sales of various packaged goods.
- Packaging costs are rising - COVID-19, energy and commodity prices, supply chain disruptions, and the Russia-Ukraine war.
- Manufacturers' challenge: pass on increased costs to consumers or to absorb these costs, potentially reducing profit margins?
- To remain competitive, manufacturers must optimize packaging design, explore alternative materials, and offer affordable products *or* what consumers see as better value-for-money.
- Shorter global supply chains and increased localization are gaining popularity to mitigate the impact of rising energy prices for transportation and storage.

[1] GlobalData Q1 2023 global consumer survey

# Inflation is causing consumers to seek alternative packaging options and choices

- Consumer spend in key categories for the packaging industry has been moderating since 2022.
- Switching to cheaper alternatives, reducing volume, switching brand or store, looking for deals – all are consumer strategies being employed to tackle cost-of-living concerns.
- Packaging design optimization has a role to play:
    - Alternative materials
    - Weight reduction
    - Smaller pack size options
    - Increased convenience

**Global: How would you describe your spend on the following products in the last 3 months?[2]**




Source: [1,2] GlobalData 2022 Q4 global consumer survey; *comparing very high, quite high, and medium spending combined

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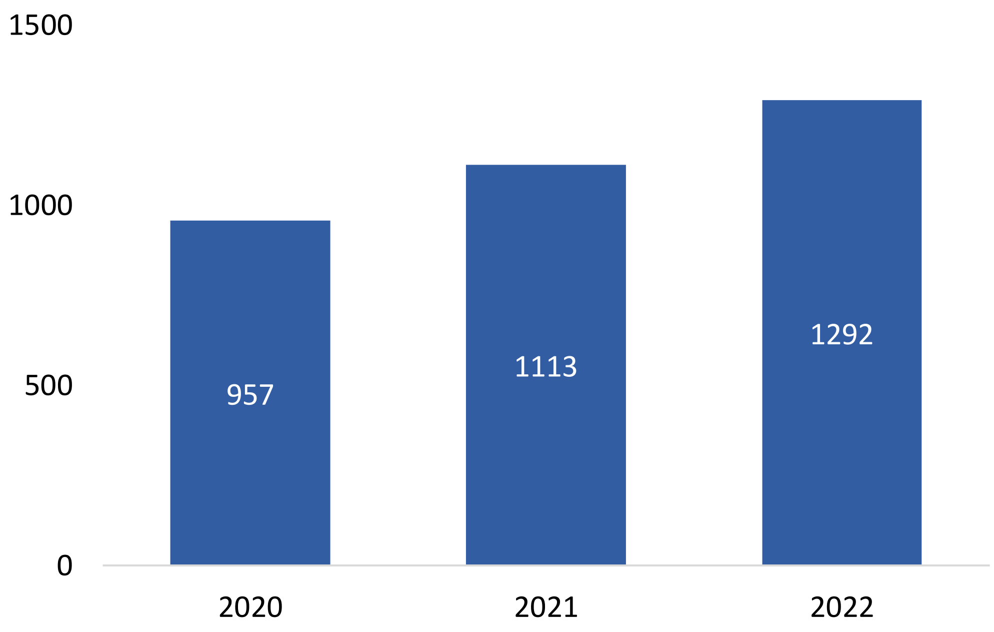
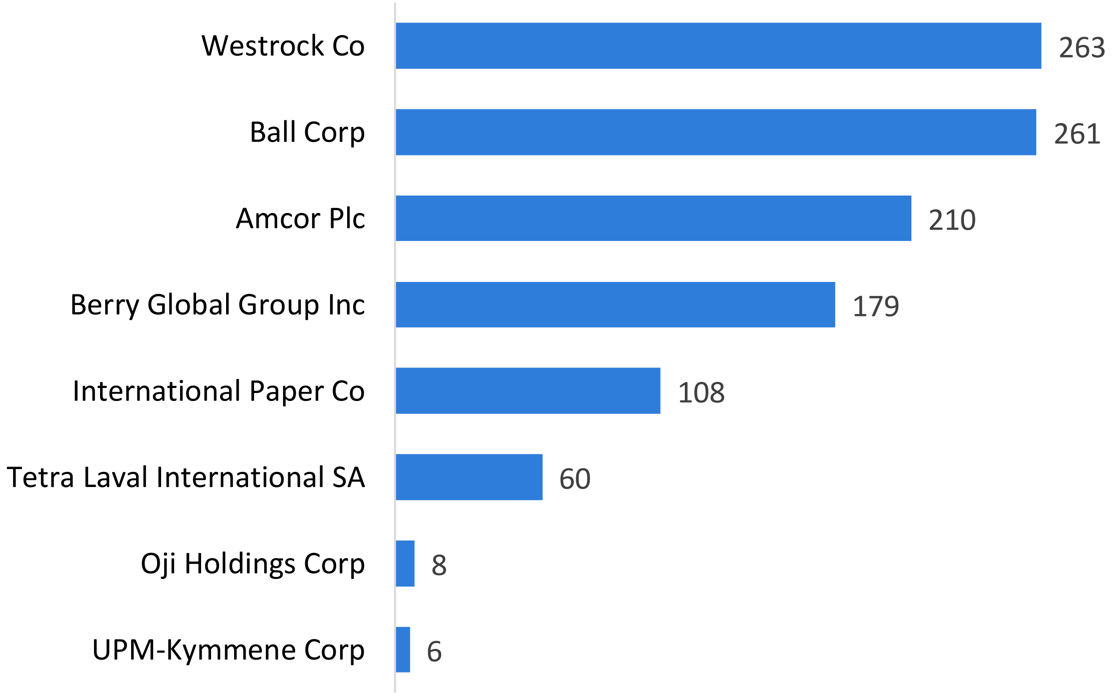
# The industry's drive for cost savings and efficiency is reflected in hiring trends

**The number of 'Cost Saving'-related jobs posted by packaging companies has grown since 2020[1]**




**Some of the largest packaging companies posted >100 'Cost-Saving'-related jobs (2020 – 2022)[2]**




Source: [1,2] GlobalData's Jobs Analytics Database; accessed February 7, 2023

# Environment

# The packaging regulatory environment has changed significantly since 2018

Even before the Covid-19 pandemic regulatory change in packaging was expanding and changing with a renewed focus on single use plastics, refilling, recycling and better waste disposal.

## 2010-2017

Regulatory environment-is focused on volume of waste recovered; emphasis more on carbon footprint and pack weight reduction/ convenience rather than ease of recycling

Flexible & lighter weight plastics packaging (e.g., stand-up pouches, lightweight plastics bottles) gain share from traditional heavier rigid packs (glass, metals)

## 2018-2019

January 2018: China refuses to take European and North America post-consumer plastics and paper waste

TV series Blue Planet II (Oct 2017) and other media initiatives raise public awareness of, and huge concern over ocean waste - the single use plastic problem is further highlighted

**New regulatory focus primarily on RECYCLING and the greater use of recycled materials**

Increasingly strong consumer and environmental lobbyist pressure on eradicating single use plastics packaging

New laws drafted on Single Use Plastics & Circular Economy

Easy targets such as carrier bags and plastic straws show rapid change

This favours **rigid single material packaging** that is highly recycled (glass, aluminium and steel cans and certain mainstream plastics (PET,PP and HDPE) that are widely used in monomer format and recycled

Challenges persist by way of complex barrier materials such as coextruded plastics films and laminates, and lower quality polymers such as PS that are difficult to recycle economically

**Trend towards ' Paperization' starts - the replacement of single use plastics with paper-based (renewable) paper alternatives**

Demand for bio-derived polymers (grown from natural resources not fossil fuels) and recycled polymers (rPET, rPP, rHDPE) grows enormously. Polymer companies start to invest more in depolymerisation and pyrolysis technologies

**Investment in packaging recycling industry infrastructure in Europe and North America accelerates**

Source: GlobalData analysis

# Regulations continue to expand with more stringent targets and broadening scope

After of a brief respite during the Covid years, the focus is now very much upon improving recycling and increasing reuse

**2020-2022**

Covid 19 closures have strong impact on channel demand - severe reduction in food service/on-premise, with some compensation in food retail and e-Commerce as home delivery booms

In beverages, initially causes a drop in demand for glass (widely used in food service), beverage cans and glass gain as retail and e-tail demand growth replaces some on-premise demand. Smaller cans replacing larger kegs.

As vaccine roll-out spreads globally and travel and on-premise demand returns, there is stronger demand for glass, especially as outlets restock, and initially businesses prefer to commit to smaller pack size purchases (risk and cash)

Supply chain issues and shortages of materials which started during the pan-demic, start to accelerate as economies recover and oil and gas demand and prices accelerate; this impacts all packaging materials

**Russia's invasion of Ukraine** in February 2022, accelerates pricing volatility and drives large rises in in inflation and declining disposable income in most western economies

Renewed focus in packaging on costs and efficiency with high material prices and rising labour costs - driving trends toward further automation

**Expansion of DRS and Closed Loop systems** begin to become more widespread as means of improving recycling rates and the quality of the recycled materials for reuse in many countries

**Paperization spreads - food service packaging beginning to transform. Multi-material packaging moves more to board-only based pack to avoid use or single use plastics**

**Refocus of the flexible packaging industry on barrier films that can be more easily recycled (e.g. monomers and aqueous based coatings/ink)**

**In the background, significant regulatory change continues to be enforced with stricter recycling targets and also more emphasis on reusable and refillable packaging**

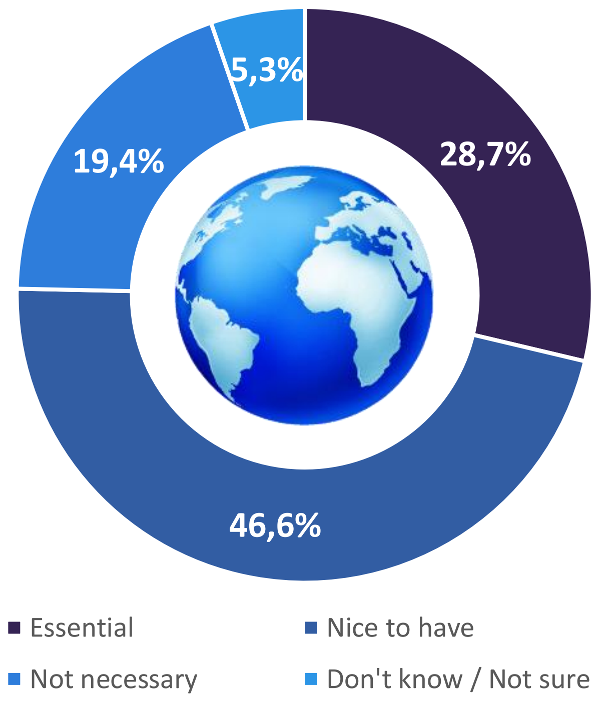
Source: GlobalData analysis

# Consumer & regulatory pressures are key factors driving packaging change

Pressure from consumers and regulators is forcing packaging companies to improve their offerings' sustainable credentials

## Pressure from consumers

**How influential is "environmentally-friendly packaging"? [1]**




## Pressure from regulators

**Regulation types and examples**

**Regulations transfer the costs and responsibility of recycling from society to businesses**

- The UK's Extended Producer Responsibility scheme
- The EU's Packaging and Packaging Waste Regulation

**Taxation targets packaging – especially plastic - waste**

- The UK's Plastic Packaging Tax (PPT)
- The EU's Green Deal

**Labelling for transparency**

- Product certification information has value in demonstrating safety and ethical/sustainable commitments

Source: [1] GlobalData Q1 2023 global consumer survey

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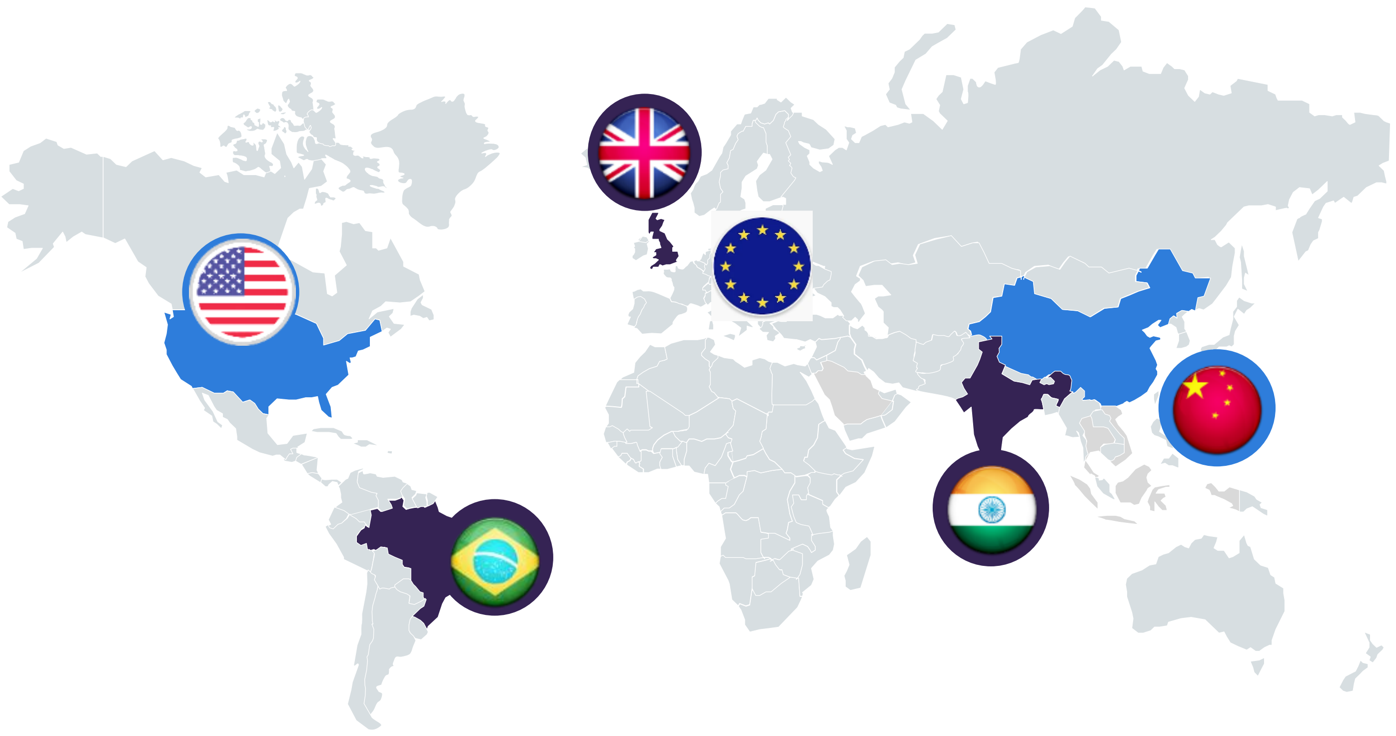
# Packaging regulations and legislative is also spreading across the globe

**The global regulatory landscape is fragmented and complex; common themes however are waste reduction, recycling, and accountability**

**Regulatory Examples by Country**



- **US states like California**, and cities such as Seattle and San Francisco, **implement local laws t**o reduce packaging waste in the absence of federal law.
- **UK's Extended Producer Responsibility (EPR) scheme** and recycling programs hold producers and importers accountable for packaging waste disposal.
- **Brazil's National Solid Waste Policy** requires producers to be responsible for the disposal of their packaging waste, aiming to increase waste recycling.
- **India's Plastic Waste Management Rules** and single-use plastic ban focus on reducing plastic packaging waste.
- **China's National Sword Policy and National Solid Waste Management Law** regulate packaging waste disposal and encourage recycling programs.
- **European Union** – Proposed revisions to Packaging and Packaging Waste Directive

# Deposit Return Schemes are increasingly being deployed to improve recycling

**DRS has become increasingly popular globally as more countries and regions recognize the value of incentivizing consumers to recycle beverage containers.**

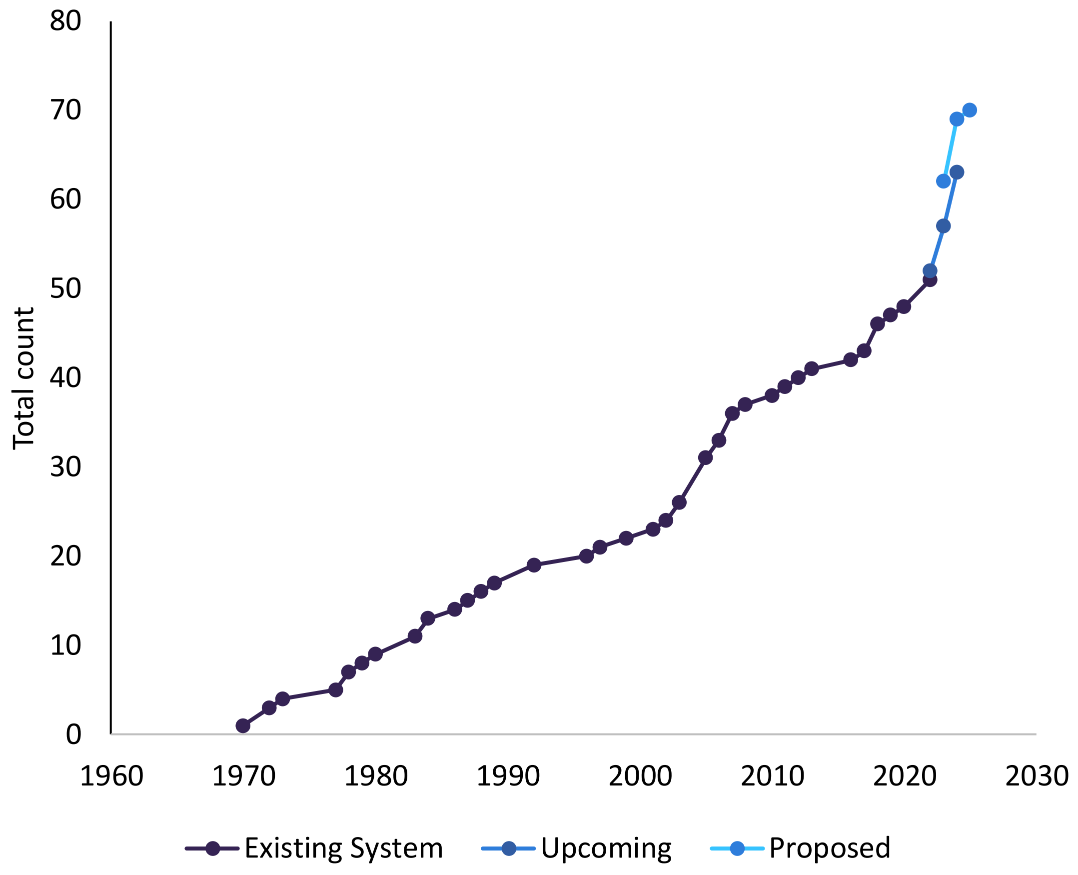
**Positives:**

- **Effective in achieving high recycling rates** for different types of beverage containers, including glass bottles, PET bottles, and beverage cans.
- **Glass bottles have consistently high recovery rates** where DRS has been implemented.
- **PET bottles have seen significant increases in recovery rates**; some countries achieving recovery rates of over 97%.
- **DRS impact on consumer behavior**, in combination with technological/materials innovation, is aiding development of **a more genuinely circular economy**.

**Concerns:**

- **Running costs** and risk of passing on to the consumer.
- **Potential conflicts over funding** and uptake between DRS systems and existing curb-side recycling schemes.
- **DRS could benefit certain pack types**, such as plastics, at the expense of other types already achieving higher recycling rates.

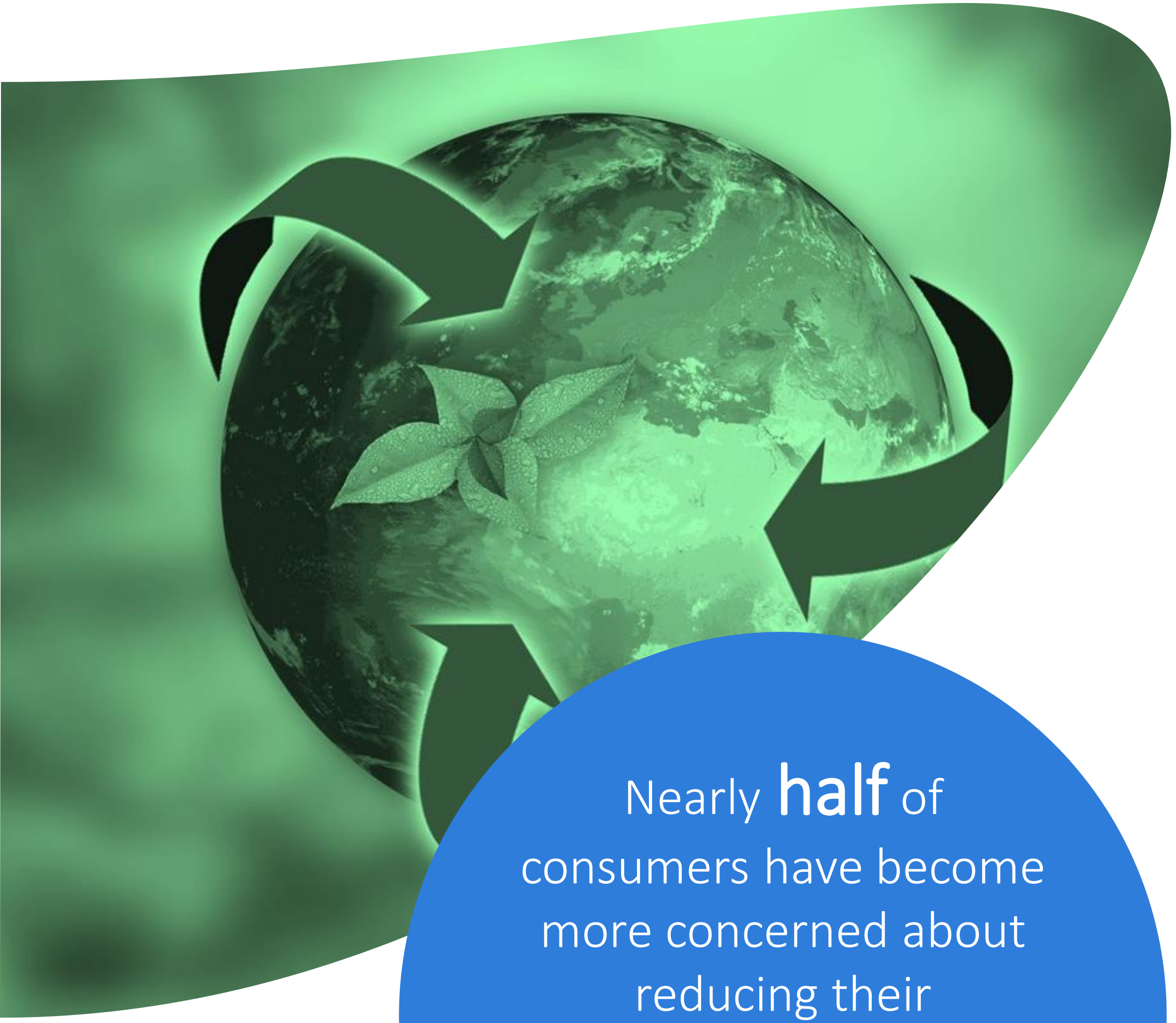
**Number of DRS projects: existing, upcoming, and proposed, 1970–2025[1]**




Source: [1] Reloop, November 2022

# Sustainability continues to be top of mind for consumers

The stronger focus on sustainability issues means it needs to be a key driver of innovation going forward



Nearly **half** of consumers have become more concerned about reducing their environmental footprint since COVID-19

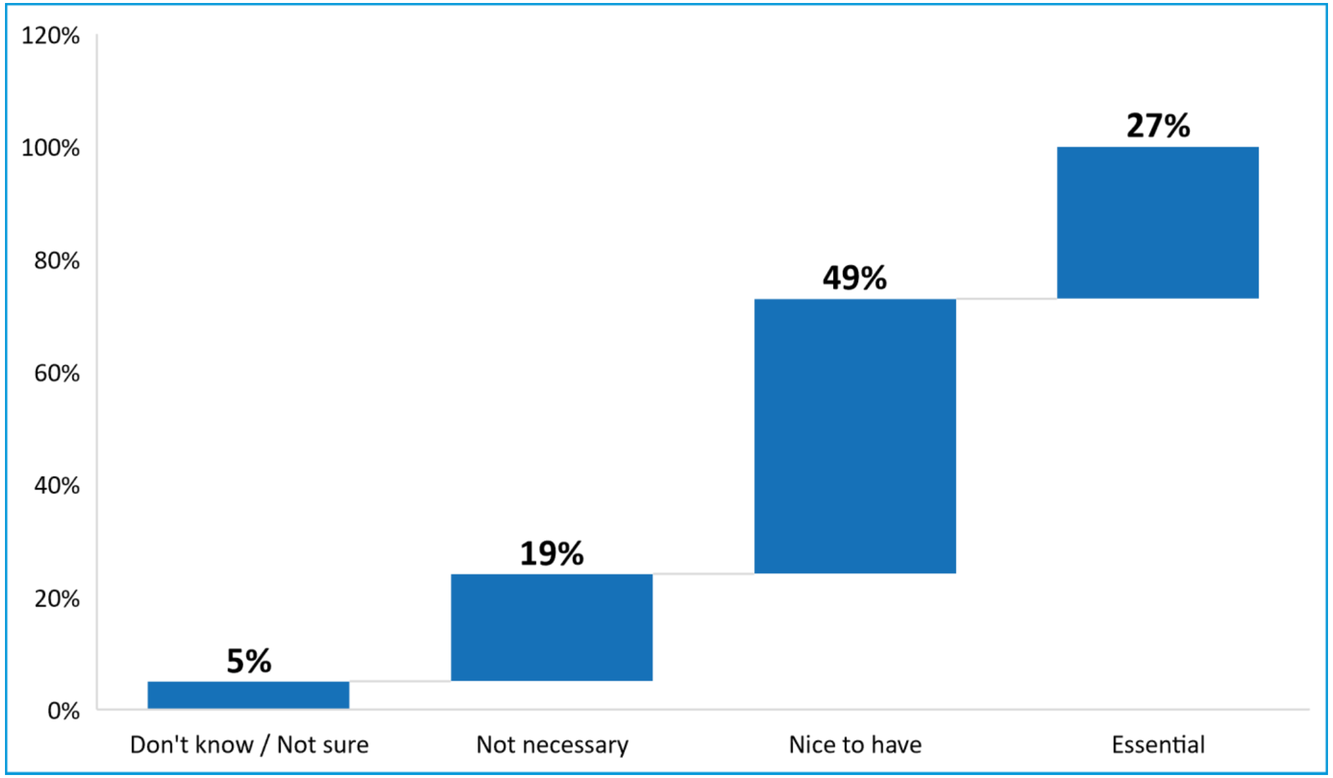
**Time** + **Digital access** → **Increased awareness**

Sustainability is still toward the top of the consumer agenda and will return to front of mind post the pandemic.

Indeed, lockdown restrictions  has led some consumers to the opinion that they can lead more sustainable lives without detriment to their standard of living. For example, travelling less through work or no longer purchasing coffee in disposable coffee cups on a daily basis.

# The major focus has been on recycling, but refilling is becoming more prominent

**Global: "Which of the following features do you actively look for when making a purchase?[2] Recyclable packaging," 2022**




The **EU Plastics Strategy** creates regulatory incentive to increase refill-ability. **Coca-Cola** has responded with a new filling line at its facility in Lüneburg, northern Germany dedicated to refillable, returnable glass bottles.

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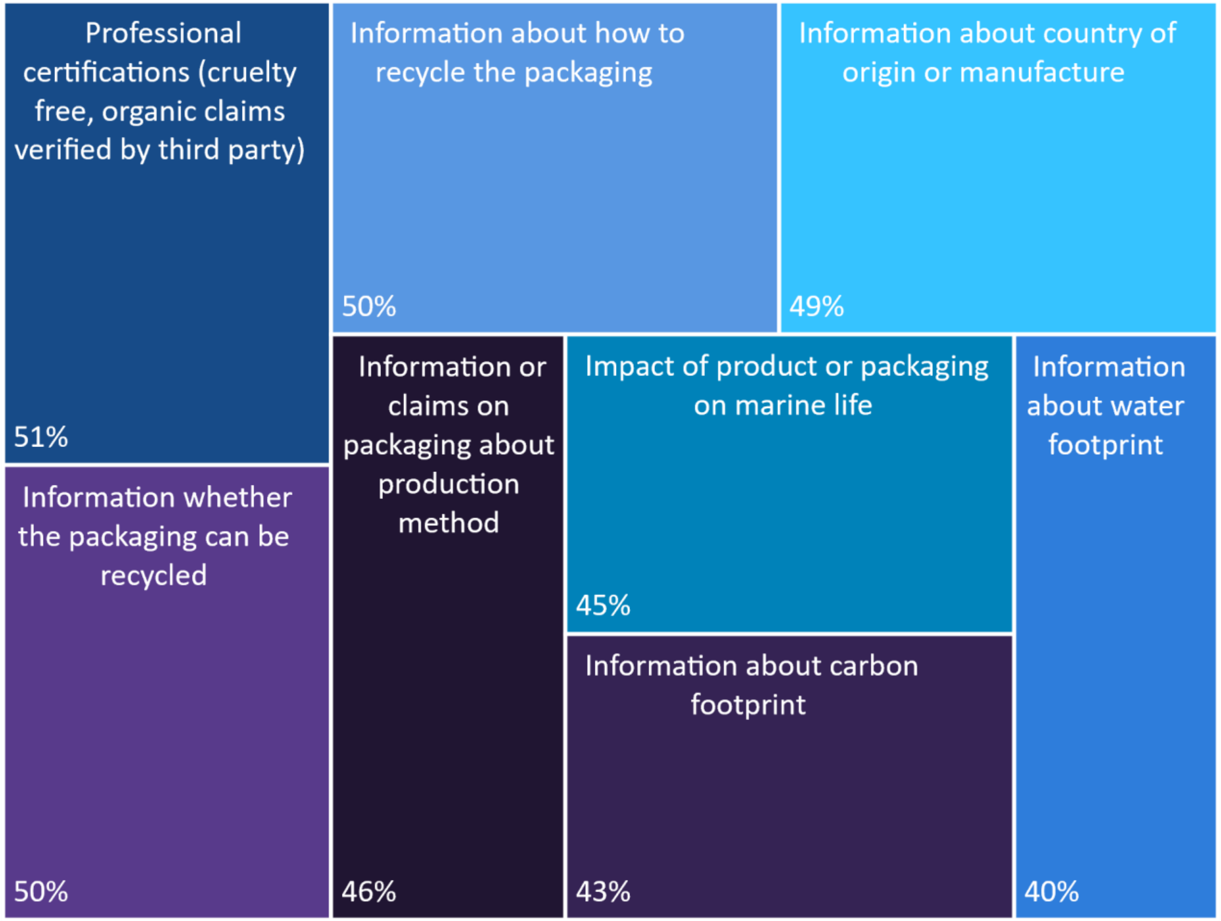
# Post-pandemic consumers are also seeking greater transparency from brands



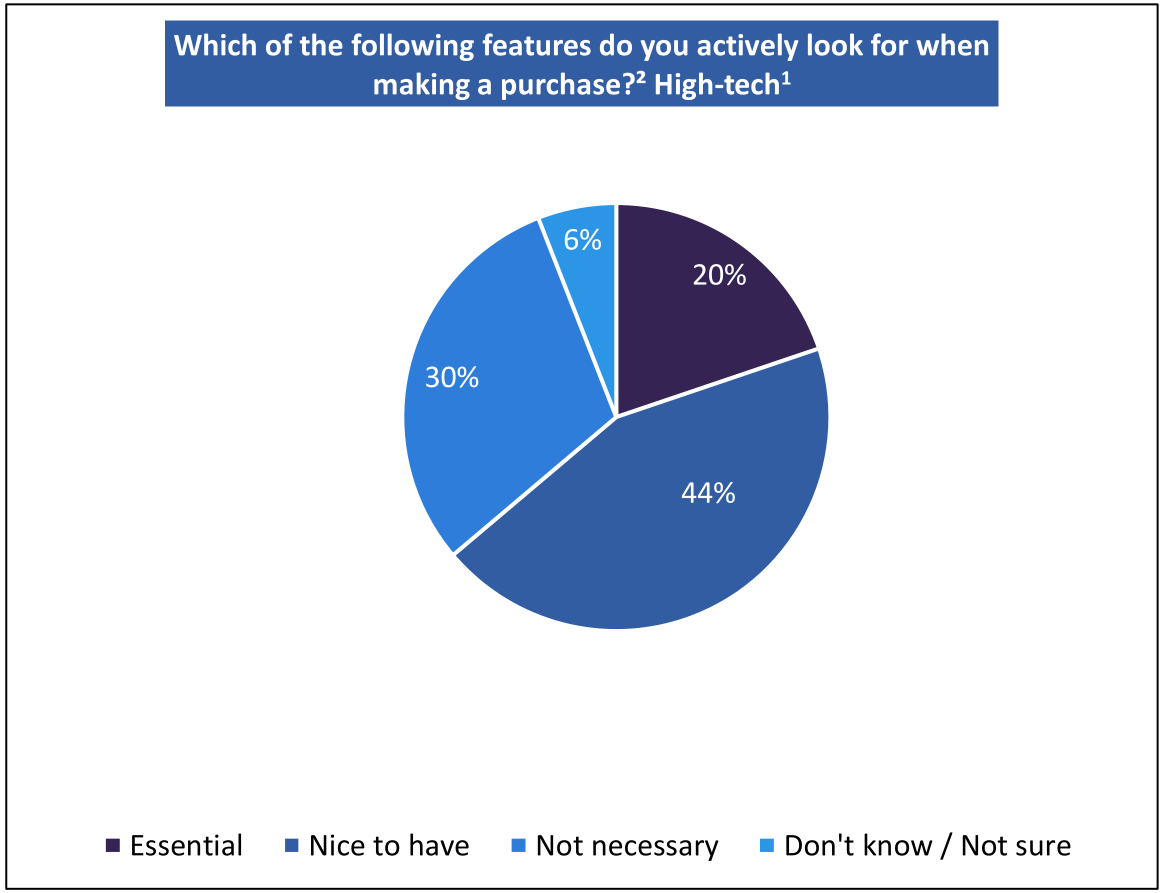

**50%** of consumers consider it essential to know whether a product's packaging can be recycled and how to recycle it.

**A theme throughout is the demand from consumers for clear and accessible information about environment impact, how responsible that packaging product/manufacturer is, and how the user can "do their bit" to ensure the impact of their usage is minimal and sustainable.**

Source: [1] GlobalData's global 2022 Q3 consumer survey

# Digitization

# Consumers continue to embrace digitally-activated product packaging for its assorted potential usage benefits




**41%** of global consumers express a preference for digitally advanced products.[1]

**64%** see high-tech features as essential or a "nice-to-have" when selecting purchases.[1]

Packaging is the essential delivery system for such elements.

Activations with consumer appeal include traceability, condition/quality assurance, promotional content, etc.

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Source: [1] GlobalData 2022 Q4 global consumer survey;

# Digitalization – Some examples of packaging Innovation at the consumer interface


Smart cans

**Coca-Cola**'s smart cans with built-in temperature sensors for product quality and safety.


Smart track and trace

**PepsiCo's** recyclable smart packaging with digital tracking and traceability systems for sustainability and consumer insights.


QR and NFC for transparency

**Nestle**'s use of QR codes and NFC technology for consumer engagement and product transparency.

Source: [1] Yan et al., April 2022 [2] Packaging Europe, July 2022 [3] Beaconstac, January 2023; Images from cristiandellavedova.com, alamy.com, adweek.com

# Digital technology is ubiquitous - impacting many aspects of packaging at same time

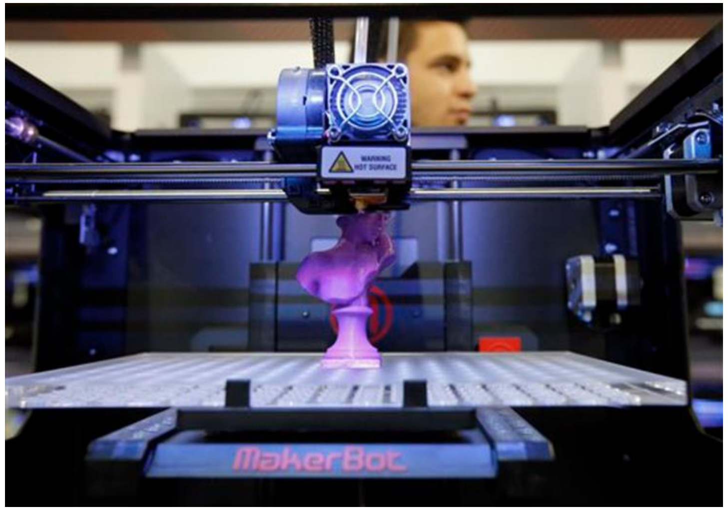
AI and related technologies can bring improvements to packaging development and recycling effectiveness

**3D and 4D Printing**

**Robotics and Artificial Intelligence (AI)**

**Optical Sorting Technology**

**Innovative methods of packaging production**




**Underpins automation of waste recovery facilities**


**Underpins automation of waste recovery facilities**


Source: The Indepdendent, Everest Labs, Van Dyck Recycling Solutions

# The increasing use of automation and robotics offers many benefits…

**DS Smith automates warehousing at its Kemsley paper mill with AGVs**

**By utilizing an array of sensors and AI software, AGVs can navigate industrial facilities without serious risk of collision. This makes them effective logistics robots because they can autonomously execute the monotonous task of transferring products from one point to another.**

Source: Stora Enso

**Increased automation and robotics benefits:**

- Can contribute to improving supply chain efficiency and reduce labor availability/cost issues
- Increased resilience to disruption (e.g., pandemics, etc.)
- Enhanced quality control via robotic inspection capabilities and real-time monitoring via cameras, vision systems, etc.
- ESG – e.g., integrated use of IoT, computer vision, and robotics in recycling processes - automatically sorting glass, metal, and plastic bottles into appropriate recycling containers.
- Fully automated production lines for new sustainable packaging will increase their cost-effectiveness versus traditional packaging.

# …but it can also create some challenges for the industry

- Margin pressures, and competitive and more complex markets.
- Managing and integrating large amounts of data effectively to streamline processes and increase efficiency.
- Protecting against growing cybersecurity concerns and maintaining customer trust.
- Balancing online and physical distribution channels in the face of increasing e-commerce and direct-to-consumer sales.
- Understanding customer preferences and maintaining a flexible supply chain to adapt to demand fluctuations.

A **60%** increase in "digitalization" mentions in 2021 compared to 2020 shows the growing importance of digitalization in the packaging industry.

**The number of Digitalization related jobs posted by packaging companies has grown steadily since 2020[1]**


Source: [1] GlobalData's Jobs Analytics Database; accessed February 7, 2023

# Summary & Conclusions

# Summary & Conclusions

**Key Industry Drivers**

Cost | Sustainability | Efficiency

**Key Industry Trends**

THE ESSENTIALS




**Key Take-Outs**

| 1. Inflation | 2. Environment | 3. Digitalization |
| --- | --- | --- |
| Reduced consumer spending power<br><br>Increased industry costs, competition and margin pressures | Increased environmental awareness<br><br>Regulatory challenges<br><br>New materials | Digital lifestyles<br><br>Digital integration of supply chains<br><br>Robotics<br><br>Interactive packaging |

# Summary & Conclusions

| Key Industry Trends | Short-term | Medium-term | Long-term |
|---|---|---|---|
| Inflation | Regularly monitor raw material prices, labor costs and adjust pricing strategies to mitigate inflation impact. | Maintain flexible supply chains and adapt marketing and sales strategies to changing consumer behavior. | Implement cost-saving and efficiency initiatives, explore lighter and sustainable packaging solutions. |
| Environment | Invest in sustainable packaging solutions and promote recycling initiatives. | Reduce waste and increase re-use and recycling rates using sustainable materials, designs, and technologies. | Ensure supply chain sustainability, incorporate ESG into business practices, and prioritize environmental impact. |
| Digitalization | Adopt digital supply chain management practices and invest in smart warehousing technologies. | Tailor packaging strategies and designs to different generations and regions for enhanced customer satisfaction. | Stay updated with technology advancements, data management, cybersecurity, and e-commerce trends. |

Overall packaging to remain squeezed between rising consumer and supply-side inflation, reduced consumption growth and tighter environmental regulations driving an increased need for cost savings and greater efficiency through automation & digitisation

# Contact Us

## For any questions or further enquiries please contact:

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# About GlobalData

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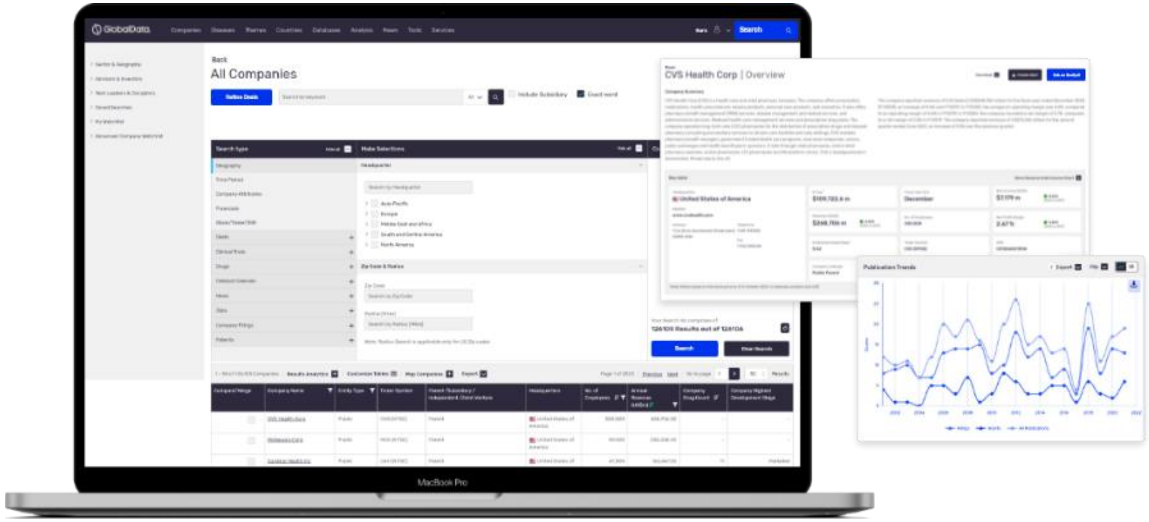

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