

# **Market entry assessment for the IQPAK reusable system**

Brief report

On behalf of  
iqpak working group  
Fraunhofer LBF and Löning + Partner

Mainz, May 2025

- > For a new reusable packaging system to be successfully launched on the market, the **interests of the various market players** must be taken into account and coordinated.
- > The **bottlers** (bottling industry and hospitality industry) need to switch to reusable packaging and adapt to reusable logistics.
- > **Packaging manufacturers** produce the films and ancillary components for the IQPAK packaging system.
- > **Retailers** must list the products in reusable packaging and offer **returns logistics**.
- > **End consumers** ultimately decide – especially from a **convenience point of view** – whether reusable packaging offers an advantage.





1. The reusable packaging does not need to be rinsed.



2. The reusable packaging can be sealed.



3. The packaging can be customized without a label and does not have to be returned to the manufacturer.



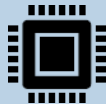
4. Returns do not have to be channeled through retailers. The chip in the packaging enables a variety of other return routes.



5. Reusables are handled by the refurbishment center and not by bottling companies or retailers. IQPAK packaging can be used on existing filling lines.



6. The content layer is adapted to the filling product. This means that each product is provided with the necessary barrier, so the packaging is not limited to the first area of application, but can be used in a range of applications.



7. The RFID chip in the packaging enables new forms of customer interaction.

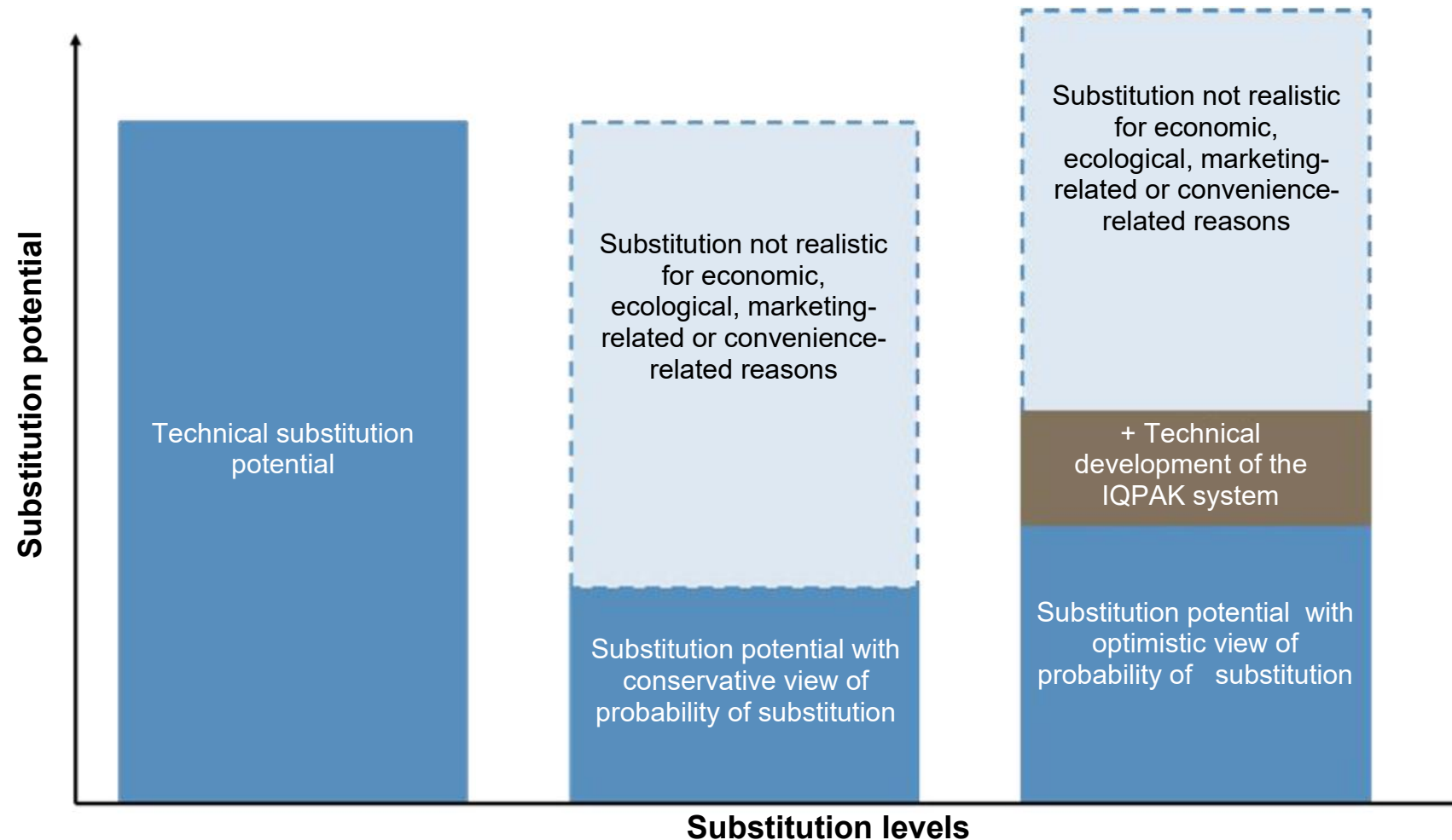


8. With the IQPAK system, even recycled materials that are not approved for use in food packaging can be used in the system and handling layers.



9. The IQPAK system can be functionally and economically competitive compared to disposable packaging and conventional reusable packaging.

We distinguish between three substitution levels:





A conservative assessment of the probability of substitution (i.e. considering economic, ecological, marketing and convenience-related exclusion criteria) suggests that the relevant market for IQPAK is 15 billion fillings per year. This corresponds to 360 fillings per household per year.

An optimistic assessment indicates that the market is 1.5 times larger and amounts to 23 billion fillings. The probability of substitution by IQPAK was assessed more optimistically and further developments of the IQPAK system (e.g. the use of a threaded closure) were taken into account.



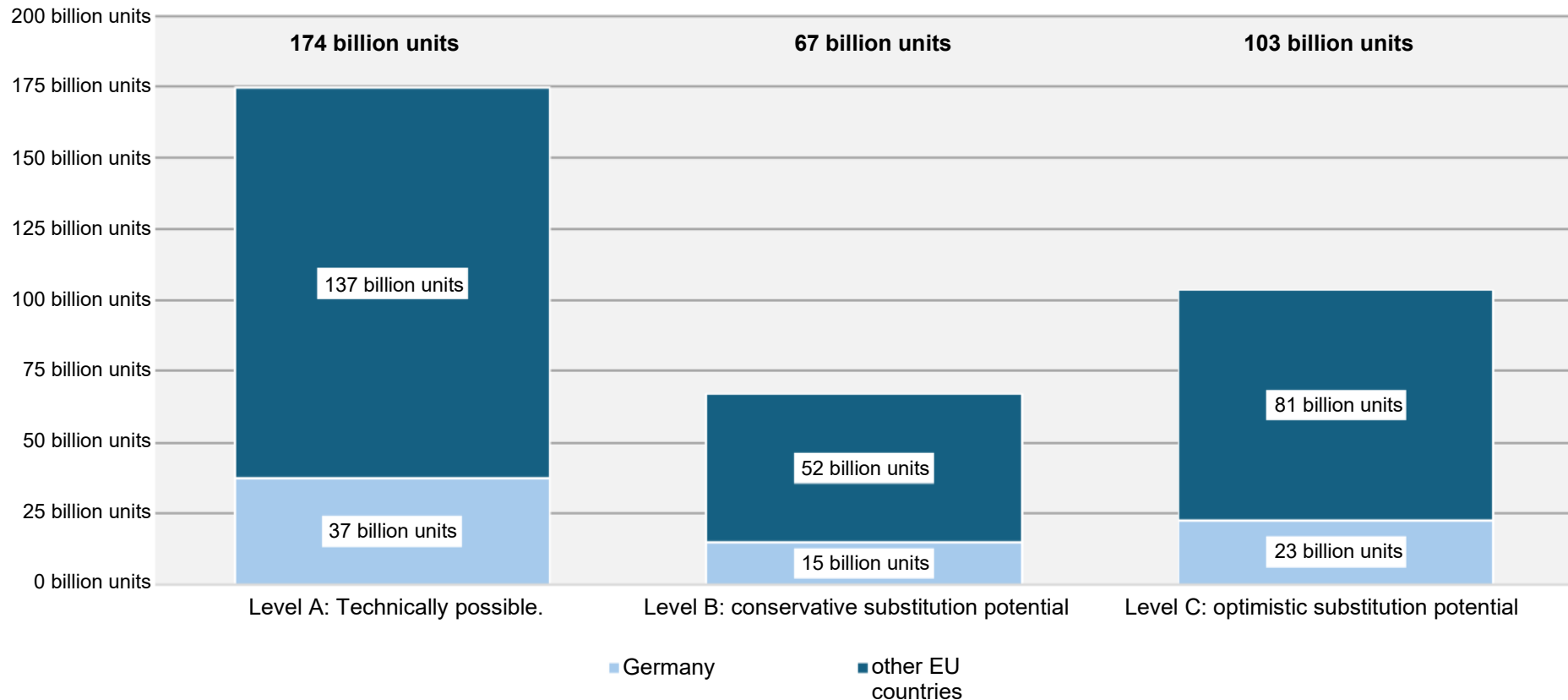
Switching to IQPAK packaging can reduce the amount of waste by 55% - 60%. The waste prevention potential increases by 6 percentage points (Level A) to 11 percentage points (Level B) once the IQPAK system has been established.

A conservative assessment of the probability of substitution suggests that the annual turnover with the IQPAK system could amount to € 1.6 billion. An optimistic assessment of the probability of substitution (substitution Level C) indicates that the IQPAK system can generate sales of € 2.8 billion.

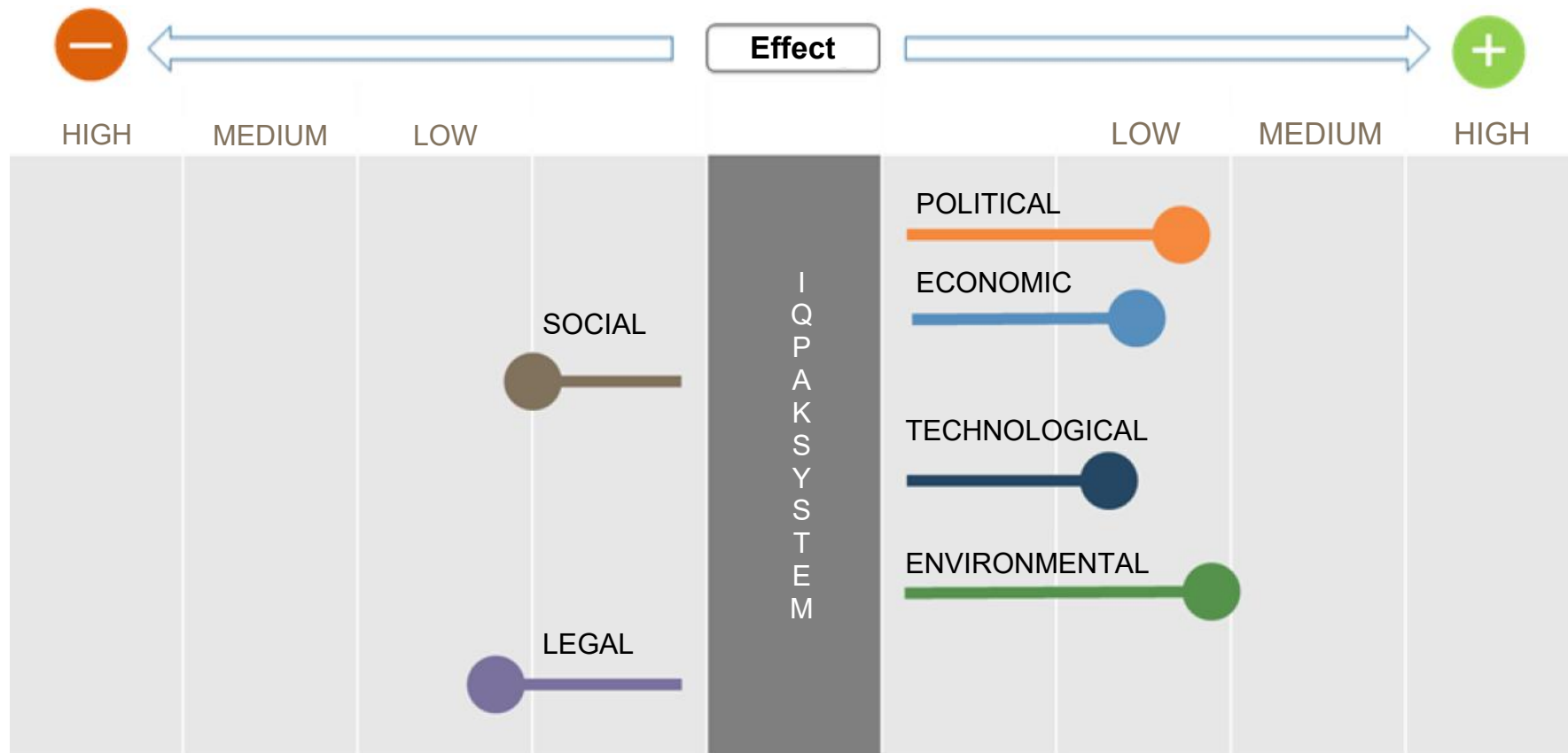


By switching to IQPAK packaging, distributors in Germany could save a mid to high double-digit million euro amount annually in participation fees and levies for the single-use plastic fund.

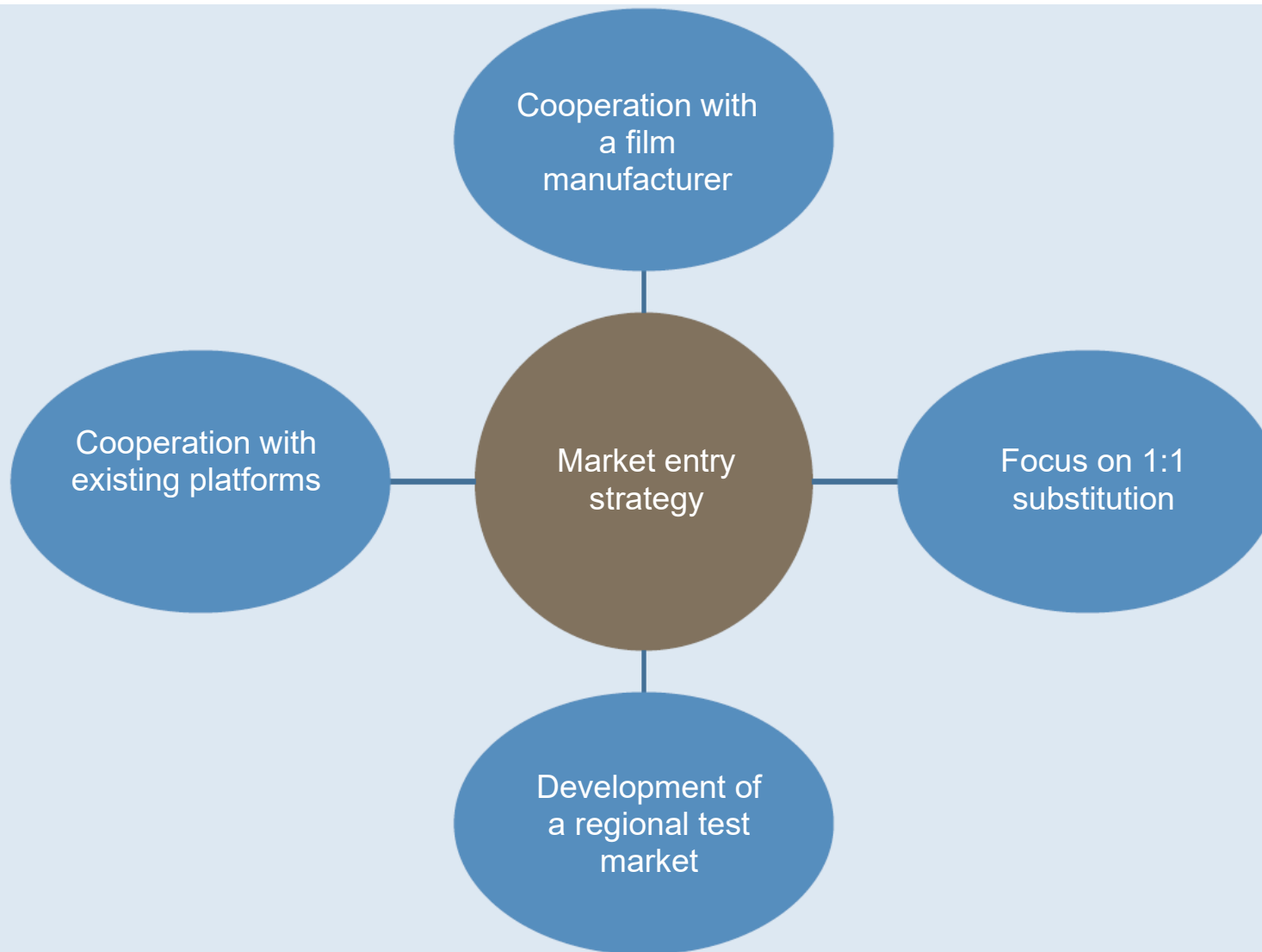
## Substitution potential



- > The substitution potential for the EU27 market is around 4.5 times greater than for the German market. According to a conservative assessment of the probability of substitution, 67 billion fillings are possible with the IQPAK system.
- > An optimistic assessment (including technical optimizations) puts the market at 103 billion fillings.



- > Based on our comprehensive assessment, IQPAK supports the trend towards reusable packaging and closed material cycles.
- > The packaging system offers potential for successful market entry in various submarkets.





**Cooperation with a film manufacturer** to (1) adapt the films to the IQPAK system, (2) produce them cost-effectively and (3) develop them further.

**Focus on the 1:1 substitution** of cups for dairy products (500 ml/g) and cups and trays as hospitality packaging.

**Development of a regional pilot market** in Baden-Württemberg. Some municipalities are campaigning against the use of disposable hospitality packaging with local packaging taxes. Municipal support, e.g. for central return facilities, can be expected to be strongest in this region.

In addition, an attempt should be made to win over the bottling company Schwarzwaldmilch to using IQPAK for its 500 g reusable cups. Schwarzwaldmilch is an established brand in Baden-Württemberg. It mainly supplies this region and already sells milk in returnable bottles.

**Cooperation with existing platforms** Platform solutions that combine conventional reusable systems with IQPAK's packaging solution can facilitate the market launch. Using existing platforms minimizes the changeover effort for users. IQPAK introduces a new type of reusable packaging that is not limited to use as hospitality packaging. Existing users of conventional reusable packaging can also be won over to IQPAK packaging more easily. They can switch to IQPAK packaging and eliminate the rinsing and refurbishment tasks without having to change platforms.

1. **The IQPAK reusable packaging system stands out** from the multitude of reusable packaging systems vying for establishment on the market.
2. The reusable system is scalable to an **industrial level** due to its **wide range** of applications in terms of packaging shapes and filling products.
3. The IQPAK system can be **functionally** and **economically competitive** compared with disposable packaging and conventional reusable packaging.
4. The system requires a **minimum volume** of fillings before the refurbishment of reusable packaging becomes financially worthwhile. For this reason, we initially recommend a **regional market entry**.

GVM Gesellschaft für  
Verpackungsmarktforschung mbH  
Alte Gärtnerei 1  
D-55128 Mainz

Tel +49 (0) 6131.33673 0  
Fax +49 (0) 6131.33673 50  
[info@gvmonline.de](mailto:info@gvmonline.de)  
[www.gvmonline.de](http://www.gvmonline.de)