

# SUSTAINABILITY AND PHARMACEUTICAL TEMPERATURE CONTROL PACKAGING

An executive level overview of current environmental scenarios facing the pharmaceutical industry





## THE VIEW FROM ABOVE

As the sustainability movement gathers pace globally, this report details key findings into the impact it is having on Temperature Control Packaging (TCP)

Pharma, diagnostic and medtech companies have been hailed as instigators for change with many setting targets to reduce the impact of their operations on the environment. Enforcing these goals has influenced partners, suppliers and vendors, some of whom have adjusted their modus operandi in a mission to respect greener initiatives.

Not surprisingly, the study finds that leaders in the life sciences sector regard the implementation of sustainability in TCP as an important aspect of their future plans, as they strive to meet internal goals and customer demand.

We probe deeper into the subject and have answers on:

- How much progress is being made
- The impact change is having and what's driving it
- The understanding of different aspects of sustainability
- Current corporate practises
- The commitment of senior managers to make changes

Read on to see the views of leading figures in the Americas, Asia & the Middle East, Africa and Europe.

# SUSTAINABILITY IS FIRMLY ON THE RADAR

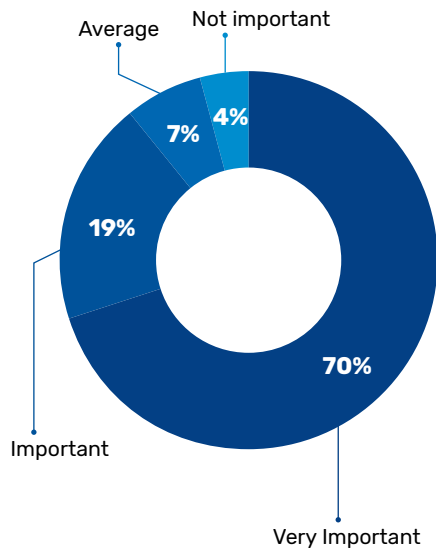
Sustainability may be a word on everybody's lips. But to what degree is it on boardroom agendas?

This study uncovered an unequivocal answer. Almost 90% of the managers polled stressed its importance, while 72% already have it on their radar. Personal preference and meeting regulatory compliance play their part in the reasons behind this.

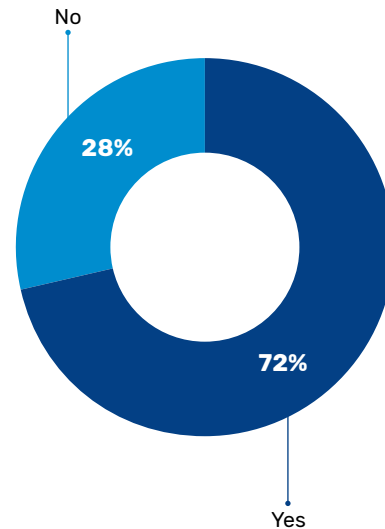
But the real driving force is customer demand which then manifests in over a third of corporate strategies.

With anything up to 69% of senior management required to work with sustainably-minded vendors who have attained a minimum EcoVadis score, this movement is likely to germinate.

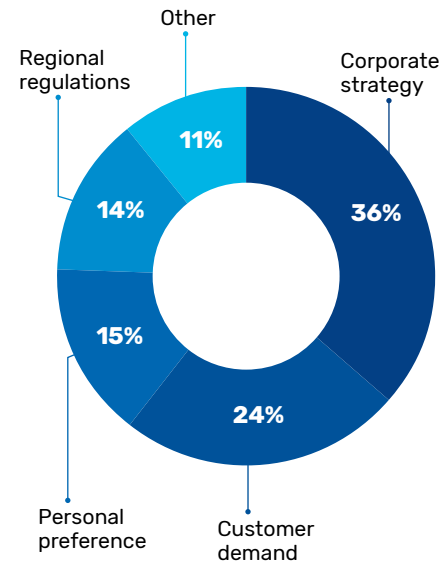
How important is the development of sustainable temperature control packaging solutions to you or your organisation?



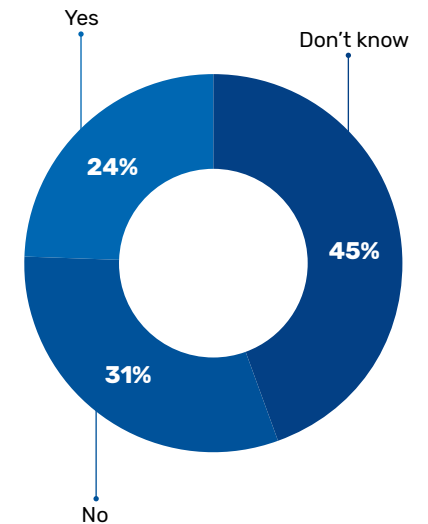
Is your company considering moving to sustainable temperature control packaging?



What is currently driving pressure to implement sustainable packaging solutions?



Does your organisation require a minimum vendor EcoVadis score?



# EVERYTHING ECO, BROKEN DOWN

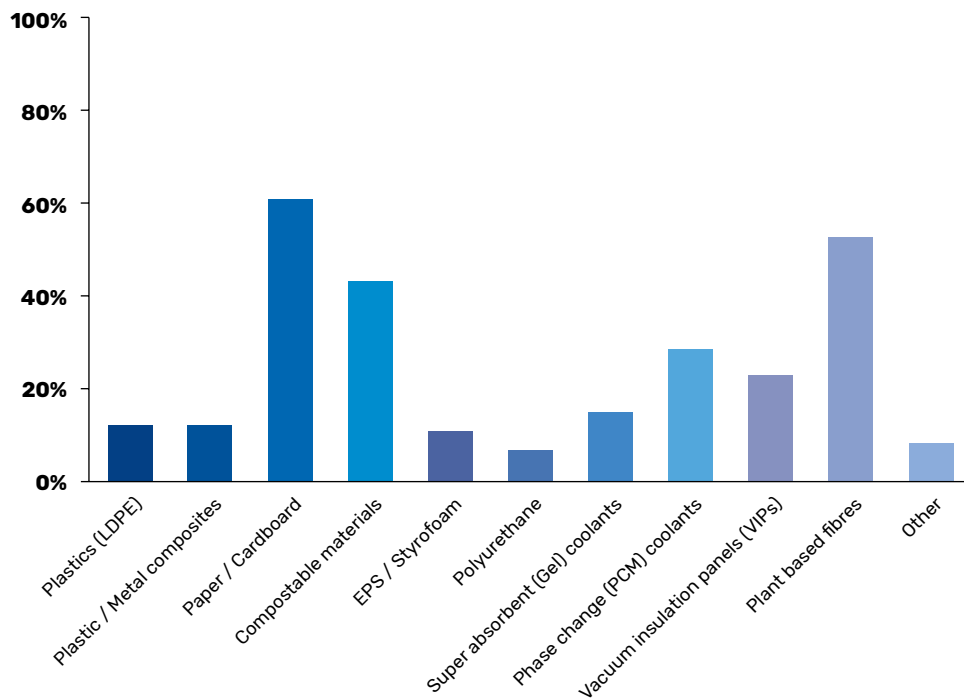
Paper and cardboard – as you might expect – are regarded as sustainable materials in over 60% of cases, with 52% acknowledging the same properties in plant-based fibres. These levels of awareness expand into every aspect of sustainability.

Our need to reduce plastics and the impact of CO2, as well as use biodegradable products are all themes that have resonated. Featuring even more prominently is the reuse, recycle, renew message.

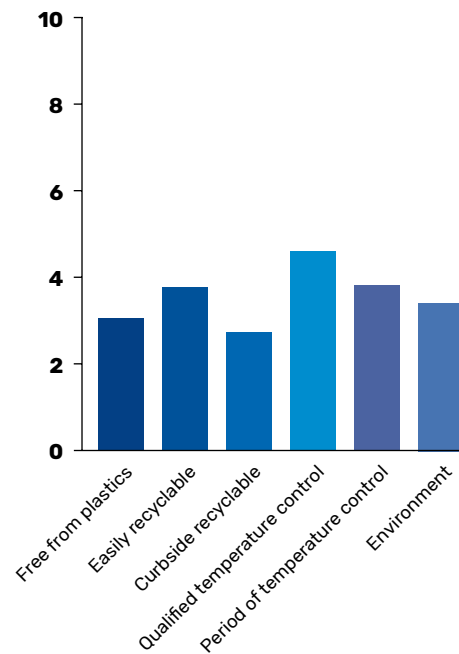
Together, they are a number one priority with over 68% of respondents. What's more, the need for qualified temperature control that ensures product integrity cannot be overstated.

To further reduce carbon footprint, there is also clearly room for recyclable solutions to work alongside reusable or renewable high-performance TCP systems.

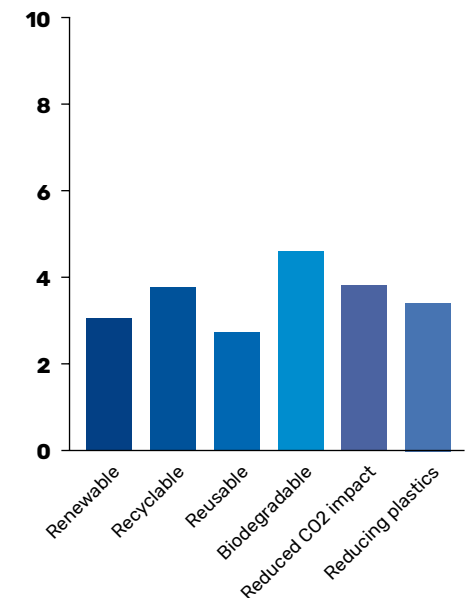
What materials do you consider to be sustainable?



What key requirements do you see as being needed in sustainable temperature control packaging?



What level of interest does your organisation have in the following?



# CURRENT CORPORATE PRACTICES

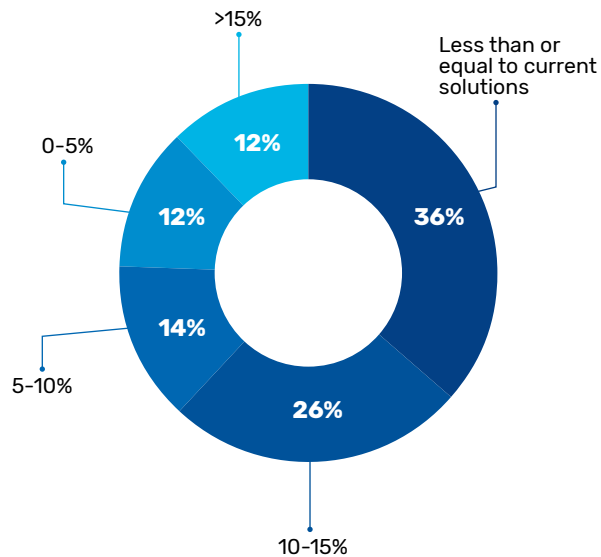
Senior executives aren't just paying lip service to the idea of sustainable TCP. Almost two-thirds are prepared to back up their words with financial outlay and more than one-third would put at least an additional 10% on top of their current budgets to make it happen.

That said, recycling and upcycling programmes are often regulated and are not always readily available or cost-effective. Disposal challenges may account for why

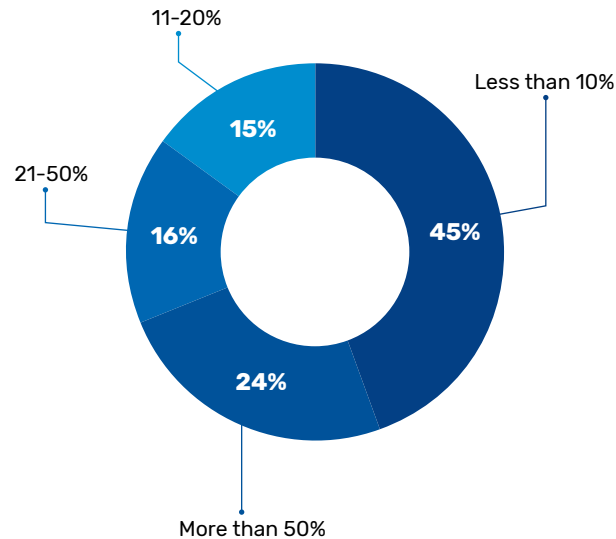
almost half the respondents recover just 10% of their TCP solutions for reuse, and only a quarter of companies recover 50%.

Curbside-recyclable TCP systems are now here to solve the problem. And for the 36% of respondents who plan to stick with their existing budgets, the news is good: they're affordable too.

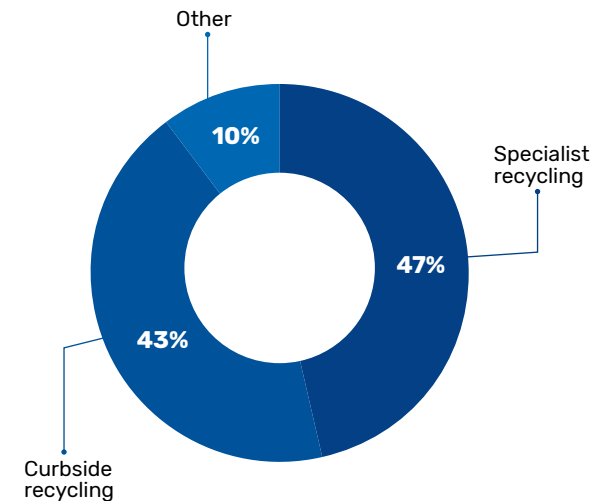
When considering sustainable packaging, what extra % would you be prepared to pay versus a traditional temperature control packaging solution?



What % of your temperature control packaging do you recover for reuse?



What % of your temperature control packaging requires specialist recycling vs. curbside recycling?



# ABOUT THE SURVEY

Softbox Systems questioned senior managers and directors working for leading companies in, or associated with, the life sciences sector. Supply chain, logistics, procurement and quality control were all represented in the survey, across 36 key countries worldwide.

## Of people who answered



Supply Chain: **24.32%**



Logistics: **18.92%**



Procurement: **8.1%**

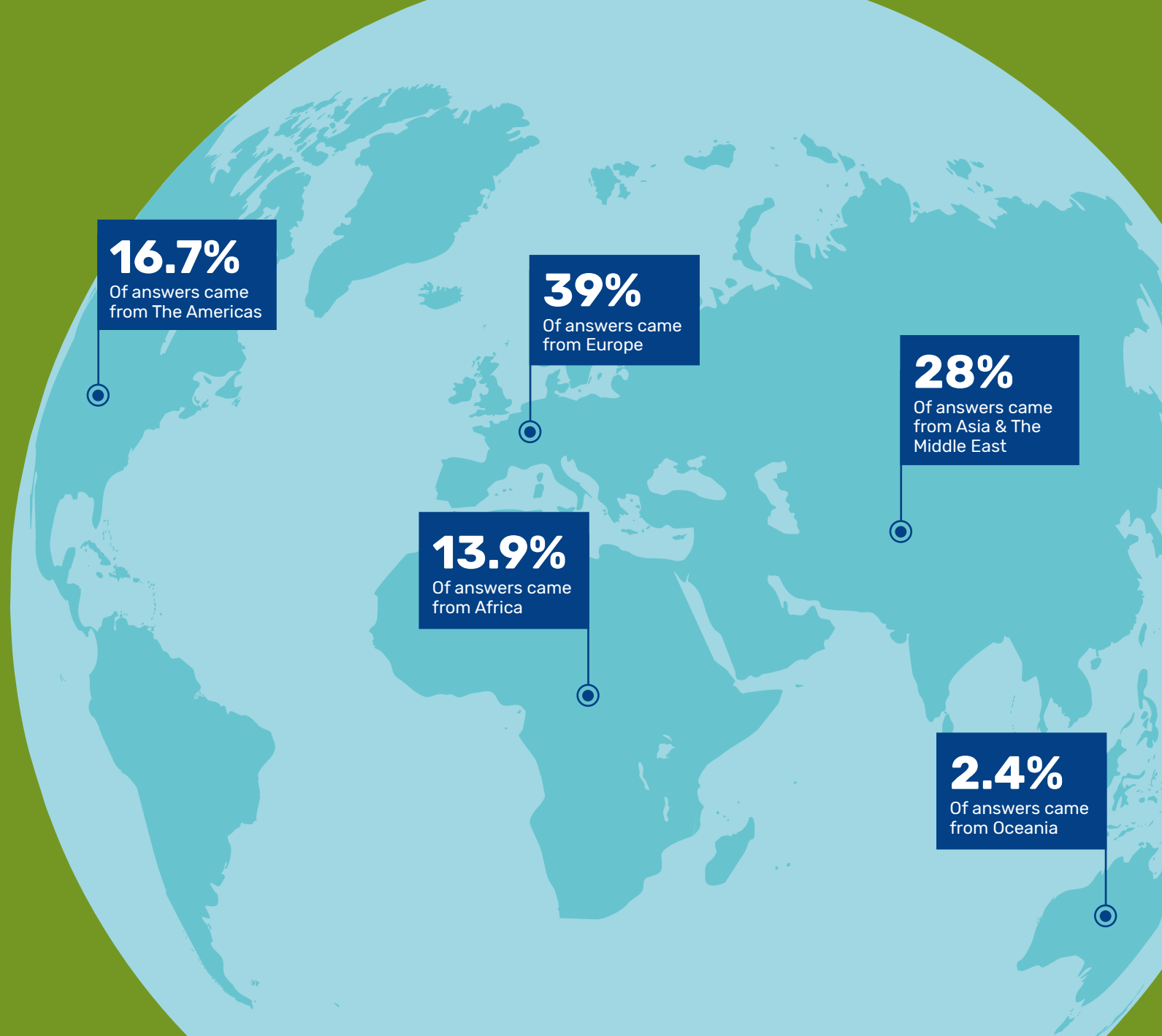


Quality Control: **22.97%**



Other: **25.68%**

The globe details the areas of the world the survey answers came from



# CONCLUSION

Each of us will assess the numbers in this report and look at the findings in relation to our own business situations

Life sciences organisations who have implemented sustainability measures will be reassured by the statistics; the indications suggest their vision will pay dividends. TCP companies will be looking at new ways to make their product lines as economically and sustainably viable as possible. Whichever side of the fence you sit on, we have to acknowledge 'green' is go and here to stay.

Steps have been taken to meet new demands and regulatory requirements; robust, reusable, high-performance shippers have ensured product integrity by offering increased thermal protection for temperature-sensitive products. Even so, the survey indicates a need for totally sustainable alternatives that can be simply recycled at all locations globally.

Necessity has put invention to work once more; the evolution from single use, to reusable, to recyclable

TCP solutions is now under way. Paper-based, eco-friendly, curbside-recyclable shippers have entered the fray, protecting temperature-sensitive goods in transit in the 2° to 25°C range (this encompasses routinely-dispensed prescription products and over-the-counter medicines).

It's just the first step along the road to complete sustainability. Pioneering TCP companies are looking to expand their sustainable product ranges in the near future to offer life sciences organisations more convenient ways to reach their targets.

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