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Date:

Place: Amsterdam

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Signature

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This report was written as part of my graduation project for the Fashion & Management course at the Amsterdam Fashion Institute. Before and during my career at the Amsterdam Fashion Institute, I have developed an interest in sustainability in the fashion industry. Because of my awareness of the environment, my buying behaviour has been changed ever since. The e-commerce industry has been growing tremendously and herewith also its packaging industry. Besides the carbon footprint of the clothing industry, in my opinion, it is necessary to take all incidental factors into account. During an internship at PVH Europe, the amount of garment packaging materials in both sections caught my attention and brought up questions on how to reduce this wasteful product. This experience opened my eyes: as many others I was not aware before, of the large amount of waste the fashion industry is producing. Therefore, I have chosen to conduct a research report about the packaging side of the e-commerce fashion industry.

This research has not been conducted by itself. First of all, I would like to thank Yolet Wefers Bettink and Merunisha Moonilal in particular for the guidance, trainings and useful feedback on my project and ideas. Thank you, Arnold Manders of ModeXpress, for giving me a great insight of the current packaging industry and sharing his vision with me. Last but not least, I want to show my appreciation to all the family, friends and fellow students that have been giving me moral support and tips to help out with the final touches.
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INTRODUCTION

RATIONALE

Recently, the pollution of the fashion industry has been increasingly brought out, it has one of the largest environmental footprints in the world (Sherman, 2019). Production of clothing consumes high amounts of water and emits chemical substances; this aspect of unsustainable production garners a lot of attention in the media and in the industry (Wicker, 2017). A commonly overlooked aspect in this discussion is packaging.

Packaging is split up in two different functions; distribution and merchandise. Distribution focusses on shortest time to retailer with minimum cost and no deteriorating of the product. Merchandise packaging focusses on aiding the consumer’s interpretation and desirability of the brand (Clothing Industry, 2018). Distribution packaging is important for every company, but for the premium fashion brands (such as Ralph Lauren, Tommy Hilfiger and Hugo Boss), the merchandising packaging also has a focus on their consumer engagement. It might be seen as a product itself.

This paper will address the more sustainable future of packaging for multi-national premium fashion brands, with the main focus on their e-commerce packaging, since this type of commerce has an ever-increasing trend (Fisher, 2017).

In a highly saturated e-commerce market, multi-national premium brands pursue consumers with quality shipping experiences and branded merchandising. In order for these companies to decrease the ecological footprint, current packaging clearly needs to be challenged. How can brands sustain a premium experience, while contributing to a more sustainable fashion packaging?
AIM
The main goal of this advice is to share knowledge obtained through qualitative research about the current situation, consumer experience and current solutions. Which steps have to be undertaken by multinational premium fashion companies to change their garment packaging methods in e-commerce to contribute to a more sustainable world yet keep their premium experience.

The research will be completed by a practical and inviting instrument for companies in the fashion sector on how to easily change their packaging behaviour throughout their entire supply chain.

QUESTIONS
Main question:
How can multinational premium fashion brands change their e-commerce packaging to contribute to a more sustainable world?

Sub questions:
1. What is the current situation of garment packaging and its environmental waste?
2. What are the commercial incentives for the current use and way of packaging?
3. Which sustainable packaging materials and methods are developed?

METHODOLOGY
For this paper, qualitative research methods will be used most often. These vary from case studies to interviews. The used research methods are explained per research question.

1. What is the current situation of garment packaging and its environmental waste?
To get an understanding of the current situation of packaging it is important to look into case studies as secondary research and field research (i.e. get in contact with multiple warehouses for possible visits or interviews) as primary research. Field research will also be done by ordering several different online purchases.

2. **What are the commercial incentives for the current use and way of packaging?**
   To investigate the commercial incentive for the current manner of packaging, there will be looked into previous case studies to clarify the consumers’ interest in the experience of shipping from premium brands and a survey will clarify the current consumers’ thoughts of the environment.

3. **Which sustainable packaging materials and methods are developed?**
   In order to find innovative and sustainable packaging methods and materials, sustainable packaging developments both within and outside of the fashion industry (i.e. electronics industry) will be researched. Case studies of fashion brands or luxury products making developments in sustainable packaging, will allow the evaluation on how to sustain particular commercial incentives while minimizing environmental sustainable cost. Doing interviews targeted towards fashion professionals working at premium brands about these new innovative findings, will aid the evaluation of sustainable possibilities.
DEFINITIONS

PACKAGING
Nowadays, packaging is used for almost every product. Products cannot be stored, packed or shipped without packaging to carry it along its way (BillerudKorsnäs, 2015). Packaging is added to a product to make sure the end user is able to use the product with acceptable quality (Kennisinstituut Duurzaam Verpakken, 2018).

E-COMMERCE
E-commerce refers to the activity of buying or selling of products or online services using the internet. E-commerce, also known as electronic commerce or internet commerce, often refers to the sale of physical products online. From the different types of e-commerce models, the Business to Consumer (B2C) is most relevant for this paper. This refers to multinational premium brands selling directly to an individual consumer, also know are online retail (Rouse, 2019).

PACKAGING SYSTEM
To balance the packaging requirements, a focus is needed on the interactions between the many functions, such as protection, containment, apportionment, unitization, convenience and communication (Pålsson, 2018).

Packaging logistics are divided into three systems (see Figure 1). Every system has its own functions of packaging:

1. Primary packaging; gets in contact with the product and is mainly designed for protection, utility and communication of the product. Primary packaging can help to create standout and differentiating a brand from its competitors (WARC, 2018).
2. Secondary packaging; is generally designed to combine multiple primary packages into a larger unit, and therefore offers protection. It also provides both the retailer and consumer with more convenience in handling the product. There may be more than one layer (Anand, 2016).
3. Tertiary packaging; contains a certain number of secondary packages (Fisher, 2017) and ensures safe and efficient delivery in the entire distribution chain. Therefore this way of packaging is also often called distribution packaging (Anand, 2016). Since this research...
REPORT mainly focusses on the Business to Consumer packaging, tertiary packaging will not be taken into further consideration.

Figure 1: Packaging system

ENVIRONMENTAL IMPACT

The environmental impact commonly refers to the damage of the environment created by people, industries, plans, services etc. The impact often gets defined by the carbon footprint, which is the amount of carbon dioxide and other compounds emitted due to the consumption of fossil fuels (Plymouth Foam, 2018). A high amount of carbon dioxide goes hand in hand with the global warming of the earth. Since e-commerce packaging materials, such as paper and plastic, are acknowledged to have a negative influence on the environment (Bourguignon, 2018), it is necessary to look into CO2 emission of the production processes and waste management of e-commerce packaging materials.
WHAT IS THE CURRENT SITUATION OF GARMENT PACKAGING IN E-COMMERCE AND ITS ENVIRONMENTAL IMPACT?

1.1 E-COMMERCE

Overall online retail is an ever-increasing trend in all markets, average of annually 15% (Fisher, 2017). Global e-commerce retail are estimated to reach $27 trillion by 2020 (Shopify, 2018). Figure 2 shows that the clothing industry is in the field of “We read about, see in stores or get advice by friends. And we buy online!” (BillerudKorsnäs, 2015). The worldwide revenue of e-commerce fashion industry is estimated to rise to $825.5 billion in 2022 (Figure 3) (Statista, 2019). According to Forrester reports, the market share of the online fashion segment has already reached 27% (Catchoom, 2019).

Figure 2: How is e-commerce evolving in different sectors? - (BillerudKorsnas, 2015)
1.2 PACKAGING FUNCTIONS

E-commerce is using a great deal of packaging, sometimes even more than traditional commerce. The packaging system can be divided in three main interacting functions (Johansson, 1998);

1. Flow; concentrates on the packaging features that contribute to more efficient handing in distribution, for instance unpacking and return handling.

2. Market; mainly serves to satisfy customers and increase sales. Mostly comes down to design, lay-out, communication and efficient aspects that create value for the product and brand. Packaging is seen as a marketing instrument which influences aspects like categorization and evaluation, usage behaviour or brand communication.

3. Environment; focusses on reducing the negative effects of the packaging system on the environment. It is established that the design of packaging systems heavily influences the environmental activities in the supply chain (Anand, 2016).

As explained in the definitions, in this research environmental outcome is an essential element. To get a clear and good overview of the grounds of the current way of packaging, it is rather important to also look into the other two functions, since they are all interconnected and influence each other.
1.3 LOGISTICAL TOUCHPOINTS

The packaging function flow has a significant role in evaluating/understanding the packaging industry, because this is the starting point of the process. The supply chain of online commerce packaging is different to the traditional retail. The point of sale of e-commerce is no longer in a physical store. It has changed to a digital device. The retailer is replaced by the consumer, which causes a complex logistical process of delivering the end-product to the end-user. The traditional retail flow of the logistical system (Figure 4) is relatively linear, by transporting the clothing from supplier to warehouse to the store. Afterwards the consumer is responsible for their purchase to take home safely. The e-commerce logistics (Figure 5) requires more touchpoints and risk of damage (Fisher, 2017). An average e-commerce parcel will have been relocated 17 times before arriving to the shipping address (Schwab, 2018). Suppliers send their bulk products to a fulfilment centre where individual orders are broken down for direct shipment to the consumer. Transport providers need sortation centres and parcel carriers to bundle deliveries to regional locations (Fisher, 2017). Due to numerous movements and therefore risk of damage, e-commerce needs more packaging.

![Figure 4: Traditional logistics - (Fisher, 2017)](image1)

![Figure 5: E-commerce logistics - (Fisher, 2017)](image2)

1.4 PACKAGING IN E-COMMERCE

In e-commerce the packaging system of three (primary, secondary and tertiary), becomes less efficient than in traditional retail. In the traditional bricks-and-mortar commerce, clothing is
usually sold in plastic or paper bags, but in e-commerce it requires more protection from, for instance, corrugated board packaging (Pålsson, 2018). In the traditional retail, secondary and tertiary packaging are the retailer’s responsibility and consumers only carry the primary. Whereas in e-commerce primary and secondary packaging both become the consumer’s responsibility. These two packages now both serve as protection of the product, for which the consumer has to handle disposal or recovery (Fisher, 2017).

1.4.1 Delivery
In contrast with conventional retail, e-commerce delivers products directly to the consumer’s home, to a nearby pick-point or a store where the consumer can collect their order. Figure 6 visualizes the many different routes of delivery in e-commerce (Pålsson, 2018). Having more possibilities does not automatically make the process is easier. It is actually more complicated and less efficient than traditional commerce. During online order checkout processes, both delivery and payment options are presented to consumers to best suit their needs and particular situations. Boxes and/or plastic bags also differ in design and quality per brand and order, which can either facilitate or complicate the handling of the product (BillerudKorsnäs, 2015). To prevent parcels from theft, several premium brands do not always show the brand from the outside: Tommy Hilfiger only shows their brand from the inside (Image 5 and 6).

1.4.2 Return
Purchases made online tend to result in significantly higher return rates than purchases in traditional stores (Fisher, 2017). The clothing industry’s return statistics rate up to 50%. It also
presents another type of consumer experience. Most often, consumers return their e-commerce product through postal service, rather than a physical store. Consumers commonly use the original packaging when returning packaging, but some packaging is better suited for reuse than others. In most cases, the consumer uses a given return label and needs to add extra tape to safely close the parcel (Image 7). Packaging of returns is commonly discarded after use. However, reusable packaging is making slow inroads (BillerudKorsnäs, 2015).

![Image 1: Added tape to close the return package](image)

### 1.5 ENVIRONMENTAL IMPACT

The total environmental impact of packaging materials is commonly based on the sum of the following three elements; cost of production, cost of use and cost of post-use (Evans, 2018). Since the e-commerce packaging is regularly discarded after single-use, we can assume that there is a relatively short lifespan of the product. The environmental impact is usually defined in carbon dioxide (CO2): is gas that naturally occurs in the earth’s atmosphere. According to Gewoon Groen (2013), this contained around 390 parts per million carbon dioxide. The concentration increases annually, which is mainly caused by large-scale use of fossil fuels and deforestation. Garment packaging mainly contains multiple components; plastic bags, cardboard boxes, order and return papers, folio and hangers. Depending on the purpose of the component, there are different materials used in the fashion packaging industry. Since plastic and paper are the most prevalently used materials, it is of value to zoom in on the use and pollution of those materials.
1.5.1 Linear system

For the packaging industry and many more industries, our current system relies on easily accessible raw materials, uses them and makes products and their packaging. Packaging is discarded after serving its purpose, covering the product (TU Delft; EdX, 2019; BillerudKorsnäs, 2015). Limited quantities of these material components get returned to the system, which results into a depletion of raw materials and surplus of waste (landfill). This is a so-called linear economy system (Figure 7). There is no balance between inputs and outputs (Koeijer, 2016). We currently live in a ‘throw-away society’.

![Figure 7: Linear system](image)

1.5.2 Materials

PLASTIC

In e-commerce, plastic is commonly used as primary packaging of the garment and is rather important than most of us think. Every single garment is covered by these light-weight poly bags (Images 2 and 3), meaning this is a gigantic amount. This transparent material makes it
easy to follow up the pick and pack in packaging centres, keeps the garment into place and prevents complications with sorting machines and damage of the garment (see Appendix 2). Not to forget, that some garments get repacked two or three times, because of poly bag breakage (see Appendix 2).

Plastic causes an enormous polluting waste, since this is not biodegradable and therefore causes serious environmental issues (Narayanan & Loganathan, 2017). Every single piece of plastic used is likely to still be somewhere on our planet (Plantics, 2019). Several researchers estimate that by the year 2025, there will be 1 tonne of plastic for every 3 tonnes of fish in the ocean (Tick Tock, 2019) and in 2050 oceans are filled with more plastic than fish (Bard Wilkinson, 2018). It is stated that 49% of the marine litter is from single-use plastic (Figure 8). This information has urged the European Parliament to ban single-use plastic by 2021 (Boruguignon, 2018). The plastic packaging of garments belongs to this single-use group. Even if consumers would want to use more than once, it would almost be impossible because of its simple design without handles and the unlikelihood to not break the material while opening (Image 8). The plastic used for light-weight bags and cling film (also called polyethylene, LDPE or PET) is estimated to have a carbon footprint of 2,50 kg CO2 per kg of plastic (Peterson, 2018).

**PAPER**

Premium acknowledged brands mostly serve a premium cardboard box, which is designed to suit their main target group (BillerudKorsnäs, 2015). In comparison to plastic, cardboard is not
used for every single garment, but every order, depending on the size of the order. Research has found that only the United States ships about 165 billion packages each year, from which 6.5 billion are filled with apparel (Limeloop, 2018). Meaning that the apparel industry represents 4%, this is not including the accessories and shoes. E-commerce sales in the fashion industry is benefitting from persistent growth in the last six years (Zaroban, 2018), which means the amount of packages in circulation is on the rise too.

COMPARING PLASTIC AND PAPER

The production processes of plastic and paper demand energy and generate waste. Paper production even generates 50 times more water pollutants and 70% more air pollutants than plastic (Technik Packaging, 2019). But the remarkable difference is that paper is made from timber, which is a renewable resource and therefore more easily recyclable, whereas plastic is composed of non-renewable resources such as natural gas and crude oil (Davis & Song, 2005). Even though this seems better, cardboard boxes used for packaging purposes yearly encompasses more than one billion trees (Peters, 2018). The eventual carbon footprint comes down to 1,04 kg per CO2 per kg cardboard (Peterson, 2018). Although this sounds less than plastic, it must be taken into account that cardboard is heavier than LDPE plastic, so it easily reaches a higher emission.

In comparison to fast fashion brands, most premium brands also use thin tissue paper, and sometimes even the original shopping bag (Images 5 to 8). Furthermore, premium brands often provide their customer with a nicely branded envelope with personal messages, order information and return instructions papers. There is no or minimal information about whether these materials are recycled or have any certifications, so it is either not communicated or no
recycled content. Since the most common paper sheets used is already recycled or FSC certified\(^2\) (Duurzaam Nieuws, 2017), the carbon footprint of these information papers is 0,00604 kg CO2 per kg (Milieubarometer, 2019). Meanwhile, the emission of virgin tissue paper is considerably higher, 0,568 kg CO2 per kg (Gemechu & Butnar, 2013).

**1.5.3 Method**

The method of boxing is a determinant of the footprint per secondary packaging. Eventually the average e-commerce order will have been relocated 17 times before arriving to the shipping address (Schwab, 2018). Because of the amount of dropping points, many parcels are boxed with superfluous space to prevent damage, which is the safest way of transportation. An additional reason is the extra premium feeling when packed big and spacious. Moreover, many e-commerce companies have the tendency to offer fast deliveries. To reduce lead-time, some companies eliminate nodes between production and consumers. According to Pålsson (2018), a limited number of packaging sizes is used, in order to facilitate fast response with efficient material handling and minimized stock-keeping costs of empty packaging. It can be concluded that transport efficiency is less significant to the companies (Pålsson, 2018). On the contrary, Scotch & Soda (Appendix 1) thinks to have an overplus with eight different box sizes, but still has issues with waste regulation and fitting sizes which can cause void space. “If you have empty space in a box you are shipping air,” Hae Chang Gea, director of package engineering program at Rutgers University. Shipping air is, indubitably, not sustainable. Carriers like UPS and FedEx are taking measures against retailers to minimize superfluous space, by including size in their taxing (Schwab, 2018).

Fashion brands are aware of the polluting factor of their packaging, but they do not know exactly how much and how to change it (Appendix 1). Field research has shown that the 100 online orders, with a white blouse and a pair of jeans, would have an estimated carbon footprint of 59,8 kg CO2 (see Figure 9).

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\(^2\)“FSC” stands for Forest Stewardship Council, an organization that works to promote the practice of sustainable forestry worldwide. The Forest Stewardship Council ensures customers have the option to choose forest products like paper and wood that have been sourced in an environmentally-friendly, socially responsible and economically viable manner (NoIssue, 2019).
1.6 CONCLUSION

It is to conclude that the environmental impact of the current packaging system is remarkably negative, and since the e-commerce has a rising trend, it is crucial to change this linear system of make-use-waste. It would be beneficial for the environment to quit using virgin produced plastic, so the waste surplus stagnates. Together with changing the system and researching other materials, it is necessary to analyse other methods of packaging, since this affects the materials quantity. Due to the different delivery and return places, the ease of handling in a packaging is also important.
WHAT ARE THE CONSUMER INCENTIVES FOR THE CURRENT USE AND WAY OF PACKAGING?

2.1 WHY E-COMMERCE?

Nowadays, the consumers are generally impatient and want to be able to buy what they want, when and where they want. The consumers decision to buy online is primarily influenced by stores that carry specific brands or products (BillerudKorsnäs, 2015). Customers prefer online shopping because of its easiness and convenience (Wills, 2014). E-commerce websites are open all the time: 24/7/365 (Khurana, 2019). Customers appreciate e-commerce, since it is preventing them from wasting time on pointless trips to stores and helping them to reorder regularly purchased items with little effort (Flaherty & Kaley, 2018).

2.2 CONSUMER EXPECTATIONS – BRAND EXPERIENCE

For online and offline shopping, the packaging design expectations of consumers differ. Within fashion e-commerce, packaging engagement only occurs after point of purchase (Fisher, 2017). Amongst online shoppers in the United Kingdom, 58% considers the packaging to be an afterthought (Whistl, 2019). For first-time online buyers the secondary packaging used for purchases seem not the be an important factor (BillerudKorsnäs, 2015).

However, customers do realize that packaging can be a fundamental and critical component in the development of an effective brand identity. In terms of consumer expectations, the main function ‘Market’ of Johansson’s (1998) packaging system fulfils a complex series of functions, from which communication is only one. Ease of handling, protection, transport, convenience and re-use are all affected by packaging (Anand, 2016). High quality packaging enhances the perceived quality of the brand, which may play a role in an possible repeat online order (BillerudKorsnäs, 2015). Because of the growing consumers’ comfort level with e-commerce, there is a higher expectation of added elements of surprise and delight. The first physical brand interaction is the secondary packaging, making the unboxing experience instrumental for the consumers’ development in positive opinions (Ilich & Hardey, 2018). Unique packaging, inspirational content and digital experiences as extensions to the physical experience are details that online retailers can use to distinguish themselves (Flaherty & Kaley, 2018).
The concept of ‘unboxing’ purchases has formed a popular culture itself, meaning that consumers are sharing their self-made videos and photos of the associated packaging such as shopping bags, boxes and shipping parcels on social media (Appendix 3). The era of social media has shifted the consumers’ behaviour from private possession rituals to conspicuous visibility (Ilich & Hardey, 2018). Research has shown that 39% of customers of online purchases shared a product image or video (Fumo, 2016). This hype makes the design focus for secondary packaging more prevalent than ever before (Ilich & Hardey, 2018). Research has shown that 39% of customers of online purchases shared a product image or video (Fumo, 2016). "We know our community is super-active on social media and will share images once they receive their products," says Glossier head of design, Adriana Deleo. "We want every detail of the unboxing experience to be exciting, surprising — and photogenic." (Fumo, 2016).

For unboxing, brands are going big. Packaging sizes do not matter anymore. Characteristics like coloured and pattered boxes, prominent logos, whimsical words and luxuriously textured bags help to build memorable experiences for consumers (Ilich & Hardey, 2018). For example, brands Glossier and Stitch Fix have the mindset ‘packaging-is-joy’ on their list of priorities. Stitch Fix includes inspirational outfit ideas in every box to give them a more enjoyable offline experience (Flaherty & Kaley, 2018). Helen Steed (Glossier’s Creative Director) says, "We created four sizes of shipping boxes, each with different messages and colors inside; surprising extras like sticker sheets, posters, and totes." (Fumo, 2016).
Besides expectations concerning delight, current consumers demands precision in terms of the delivery system. Receiving and returning the online purchase also affects the consumers’ experience. Elements like geolocation information, inventory data, order-status messages, pickup time frames, pricing, arrival dates and user reviews are very important to a customer (Flaherty & Kaley, 2018). When it comes down to frustrations, for the majority of UK consumers high delivery charges tops the list (Whistl, 2019). However, research had shown that the consumer is more satisfied when there is a surcharge calculator at the top of the webpage near the price (Flaherty & Kaley, 2018). The more accurate information you provide your client, the more control they feel. Current consumers demand the brands to deliver rapidly, but accuracy of delivery information is the more important (Whistl, 2019). Delivering on these expectations can build trust and loyalty (Flaherty & Kaley, 2018).

Another feature is the absence of the ability to carry big boxes, which leaves an unsatisfactory mark. Consumers want the return to be as effortless as possible, thus these boxes are an even bigger annoyance (BillerudKorsnäs, 2015). Customers commonly use the original packaging for their returns, for which some designs are better suited than others. The ease to close the packaging is another important factor. Some packaging designs demand extra tape to reseal, whereas other do not (BillerudKorsnäs, 2015).

2.3 CURRENT PERCEPTION OF ENVIRONMENT

A slightly contradicting fact with the unboxing hype, is that most online consumers aggravate about excess packaging (Images 10 and 11) (Ribble, 2019). This has to do with environmental aspects. Sustainability is a new trend amongst today’s society. Consumers are getting more conscious about the increasing amount of litter and impact of their purchases to the environment (Catchoom, 2019). A survey under UK online shoppers concluded that two-third thought minimizing the amount of parcel packaging used and using environmentally friendly packaging is important when they place an order (Whistl, 2019). 60% of US consumers agrees (BillerudKorsnäs, 2015). Excessive packaging has a negative impact on the consumers experience. It does not matter whether this excessive amount of material is eco-friendly, it makes the consumer feel the online retailer is wasteful and not caring about the environment. In addition to that impression, the consumer gets frustrated having to get rid of the waste, either in the bin or some place to recycle. Moreover, there is barely information communicated to the consumer on what to do with the waste materials.

When it comes to financial matters, research has shown that frequent online shoppers would be willing to pay for eco-friendly packaging. Shipping costs are decided per brand and
country, but for standard delivery it comes down around five euros and free shipping from €50-€100. This amount is easily reached, since clothing from these brands regularly starts from those prices. If there would be any charge on more sustainable packaging, on average, the consumer is willing to pay €0.98 per online order (Whistl, 2019).

2.4 CONCLUSION
Consumers consciously choose to use e-commerce, because it takes less effort and provides more options in comparison to going to stores. At first glance, customers do not seem to have an expectation of the packaging. Factors like fast delivery, an attractive package (to share their unpacking experience on social media) and an easy return system seem to be important to them. Nevertheless, in the end the environmental impact also seems to influence consumers’ opinions about a brand. They are becoming aware of the environment and creating a negative image of a brand that does not require packaging. This can be due to the low level of information about what to do with the materials. If it would help, customers are willing to pay money for eco-friendly packaging.
3.1 CIRCULAR SYSTEM

The Sustainable Packaging Coalition decided sustainable packaging needs to meet the following criteria; 1) healthy (materials) for individuals, communities and its lifecycle, 2) meets market with performance and costs, 3) entire system uses renewable energy, 4) uses recycled materials, 5) uses clean production technologies, 6) optimizes materials and energy, 7) is effectively recovered in biological and/or industrial closed loop cycles (Magnier & Crié, 2015). This can be further explained in throughout the circular system. The main focus of the circular system is to maintain the material quality in biological and technical cycles. This means that all outputs from the different steps within this system should form input for other steps. The circular system’s goal is not to minimise the cradle-to-grace flow of materials, but to support the cradle-to-cradle that focusses to maintain the quality of materials and to accumulate intelligence over time; upcycling (Ellen MacArthur Foundation, 2012). The circular system tries to provide solutions for issues in the linear system. In Figure 10, the dotted lines show that after their use the materials can be recycled. But since the linear sourcing systems of input are not focussed on output, the recycling is only partially applicable (Koeijer, 2016). Think of ripped plastic bags and damaged cardboard boxes, packaging that exists of more than one resource, or packaging has different colours which are difficult to divide or recycle (TU Delft; EdX, 2019).

Figure 10: Linear system supported by circular system - (Koeijer, 2016)
In an ideal situation, the circular system creates eco-effectiveness: an endless cycle of materials, preventing loss of quality and providing a positive environmental impact (Figure 11). Biological lines are for instance paper and biodegradable materials that can be returned to the biosphere. Technical lines indicate the possibility of recycling, remanufacturing and reuse. Landfill is not part of the circular system, as this will result in a surplus of waste (Koeijer, 2016).

**Figure 11: Circular system (Koeijer, 2016)**

3.2 SUSTAINABLE PACKAGING OPTIONS

The circular mindset of reducing, recycling, repairing and reusing is fundamental for researching new sustainable options. There are many different ways to split up these options for the e-commerce packaging. For this paper, the focus is on the functions of the materials, therefore this chapter will be divided in decoration, primary packaging, informational elements, and secondary packaging (Images 12 to 16).

**Image 12: Current decoration – tissue paper**

**Image 13: Current primary packaging – poly bag LPDE plastic**
3.2.1 Decoration

There are some interesting alternatives for packaging aimed on decoration. In order to replace the existing tissue paper and clingfilm, the company ‘Bumble Wrap’ is offering sustainable supporting alternatives. These are currently used to wrap food, but they would be an excellent replacer of current wrapping foils in premium garment packaging. The material is made from bee wax and cotton and is biodegradable, washable and reusable (Bumble Wrap, 2019).

Another option is to use the FSC certified sustainable foil of the company ‘NoIssue’. This soy-based tissue paper is completely acid free and available in different colors. Because of its soy-based ink, it is easy to recycle or compost, in comparing to conventional petroleum-based ink (NoIssue, 2019).
3.2.2 Primary packaging

Also, for primary packaging there are several environmental-friendly alternatives. Transparent iodegradable plastics, like ‘Plantics’ (Plantics, 2019) and Mater-Bi (Mater-Bi, 2019; Novamont, 2019) have been developed in the last couple of years. These materials are available at low prices, which have accepted mechanical properties and allow disposal in the soil waste (Wróblewska-Krepsztul & Rydzkowski, 2018).

Another example of bioplastics that can be used as replacement for garment LEDP plastics is ‘Evoware’. This is made from seaweed and improves the wellbeing and income of seaweed farmers (Evoware, 2019). Biodegradable polymers can be disposed together with organic waste, so they will eventually be “from nature to nature” and reduce the amount of plastic waste (Wróblewska-Krepsztul & Rydzkowski, 2018).

Whereas the mentioned characteristics of biodegradable plastics are only promising, a downside of these materials is that it can be difficult to identify them and separate them from conventional plastics. The biodegradables should not end up in the recycling process of ‘normal’ plastics. Because of the high stickiness of biological plastics after heating operations, machinery can get blocked and the quality of the recycled product decreases (Kesseler, 2014).

3.2.3 Informational elements

To find an eco-friendly solution for the informational elements of the packaging, we need to think more creatively. Since most brands already use the FSC certified papers, it is barely achievable to find a better material. Therefore it is useful to look into the method of communication. There are easy-applicable, creative and small solutions to reduce paper, such as printing double-sided. Also, creative ways of folding order papers into envelops are efficient to reduce paper.

Another substitute of envelops and papers is communication via QR-codes (Quick Response), one of the first technologies that easily connects the real and digital worlds (Kavanagh, 2018). It is researched that QR codes have a future (Figure 12). Apple has been introducing a QR-code reader into their camera application, so downloading a separate QR code-reader is no longer needed for Apple users. Next to financial purposes, the QR-codes can also be used to enrich shopping experiences. For example, Urban Outfitter is using QR-codes so shoppers are easily able to earn rewards during their checkout process (Image 20) (Flaherty & Kaley, 2018). It could be possible to use QR as an alternative to all the paper sheets and envelops used in packaging, which means this changes into an online experience.
3.2.4 Secondary packaging

To find eco-friendly solutions for secondary packaging, the materials and methods of packaging can be evaluated and improved. In terms of the materials, it is helpful to replace the conventional cardboard boxes by a recycled or FSC cardboard boxes, so the CO2 emission reduces. For secondary packaging, it is necessary to look into the method of packaging, the box sizing is a prominent factor. It is useful to have a wide range of packaging sizes that fit the products that the brand is selling (Ribble, 2019). Herewith, the packaging waste gets limited.
Online fashion brand ASOS gave the example that they could cut their average carbon footprint of mailing boxes by 33%, by switching to the next smallest packaging (ASOS, 2018). ‘Box-on-demand’ is therefore an important choice (ASOS, 2018). Instead of having an immense range of box sizes, the company Made2Fit introduced a new folding system which covers 33 different box sizes with only three sizes (small, medium and large) (Image 20) (Qureshi, 2018). This method reduces the void fill with an average of 80%. An overlooked area in this is that the packers should be trained very well to pack the boxes with care (Whistl, 2019).

Another option would be the more systemized box-on-demand system of Moonen Packaging, in which an endless stream of corrugated cardboard, scan machines, software systems and machines are used to fold the right size for the order. As well as the 80% void fill reduction, this system also reduces the packaging costs with 40%, causes 30% less logistical problems and decreases the return costs (Moonen Packaging, 2019). A big loss on this system is that branding is practically impossible, which is an important factor for premium fashion brands.

Finally, the PP plastic bag can be a good substitute for secondary packaging. This material has a slightly higher CO2 emission for production, but can be reused many more times (Peterson, 2018). Companies like Repack, Returnity and Limeloop are currently using the material and very satisfied (Images 21, 22, 23). Repack has recently switched to recycled PP plastic to make their company even more environmental friendly. The aim of these companies is to create a closed loop in the packaging industry. Thus, the secondary packaging is designed to send back by the consumer, in order to use the packaging several times. So far, the average use of one Repack package is around 20 times. This can also be doubled, or lower, depending on customer behavior. This circular method is easily to brand and will eventually decrease the CO2 emission with 96% (Repack, 2019). These closing-the-loop brands are an intermediary for the brands, meaning they will clean and repair the packaging when returned by consumers, so the brands can use the packaging effortless (Figure 13).
3.3 CONCLUSION

For this chapter it is to conclude that there are many sustainable alternatives for the primary packaging, secondary packaging, decoration and information papers. The main purpose of a good solution is to take the circular system as a starting point, when rethinking the design process of e-commerce packaging.
CONCLUSION

The environment is a great concern amongst our society, since many industries are causing a lot of pollution. The fashion industry is one of the industries with the highest carbon footprints. The aim of this research was to find out how multinational premium fashion brand can change their e-commerce packaging to contribute to a more sustainable world. The-commerce keeps rising yearly, which eventually causes a rise in the packaging industry too. The packaging materials are divided in four different functions; primary packaging, secondary packaging, decoration and information. These materials are made from either paper or plastic. Both are acknowledged to have a high carbon footprint. As long as nothing changes, the ocean will be filled with more plastic than fish in 2050 and the earth will lose more than one billion trees a year. The e-commerce industry needs more protection than the traditional bricks-and-mortar commerce because of more touchpoints. Premium fashion brands and their consumers are aware of the negative pollution of packaging and they both want it to change. At the same time, consumers want to have an exciting unpacking experience, together with easy and effortless handling of the packaging for eventual return. The fashion brands are willing to change, but are struggling with how to change. E-commerce packaging causes a responsibility switch from the brands to the consumer, meaning the consumer is left with more packaging waste. The consumers say to be annoyed by the high amount of materials and excessive way of packaging. Brands must transform the linear system of the current throw-away society, to a circular system of reducing, recycling, repairing and reusing. Therefore, it is essential for the brands to eliminate irrelevant elements (such as plastic poly bags), and to keep the unpacking experience as comfortable as possible.


analysis
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EMAIL/CALL WITH SCOTCH AND SODA, STEPHANIE SIEM, 8 APRIL 2019

Hi Anne,

Zie onderstaand in rood antwoorden.
Tijdens de sale worden onderstaande witte dozen gebruikt

<table>
<thead>
<tr>
<th>Verzenddoos 59x39x40 cm [Ds 1] (S&amp;S)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Verzenddoos 59x39x15 cm [Ds 2] (S&amp;S)</td>
</tr>
<tr>
<td>Verzenddoos 39x29x15 cm [Ds 3] (S&amp;S)</td>
</tr>
<tr>
<td>Verzenddoos 59x78x30 cm BC [Ds 4] (S&amp;S)</td>
</tr>
<tr>
<td>Verzenddoos hang 52x39½x95½ cm <a href="S&amp;S">Ds 5</a></td>
</tr>
<tr>
<td>Verzenddoos 75x55x15 cm [Ds 6] (S&amp;S)</td>
</tr>
<tr>
<td>Insert verzenddoos 38x58 cm [Sheet] (S&amp;S)</td>
</tr>
<tr>
<td>Verzenddoos 60x30x40 cm bruin (S&amp;S)</td>
</tr>
</tbody>
</table>

Tijdens gewone verkoop onderstaande zwarte dozen.

<table>
<thead>
<tr>
<th>Envelope *FSCR</th>
<th>100</th>
<th>32,5x25x29</th>
</tr>
</thead>
<tbody>
<tr>
<td>Square Box *FSCR</td>
<td>50</td>
<td>34,5x26,5x22</td>
</tr>
<tr>
<td>Rectangular Box *FSCR</td>
<td>50</td>
<td>46x26,5x20</td>
</tr>
<tr>
<td>Extra Small Box *FSCR</td>
<td>20</td>
<td>68x45,5x10</td>
</tr>
<tr>
<td>Small Box *FSCR</td>
<td>20</td>
<td>68x48,5x12</td>
</tr>
<tr>
<td>Medium Box *FSCR</td>
<td>20</td>
<td>76,5x50x12</td>
</tr>
<tr>
<td>Large Box *FSCR</td>
<td>20</td>
<td>75,5x56x23,5</td>
</tr>
<tr>
<td>Extra Large Box *FSCR</td>
<td>20</td>
<td>83,5x53,5x24,6</td>
</tr>
<tr>
<td>Extraextra Large Box *FSCR</td>
<td>10</td>
<td>104,5x64,5x11</td>
</tr>
</tbody>
</table>

Succes

Stephanie Siem

Production
Hi Stephanie,

Fijn je te ontmoeten en zo open met elkaar gesproken te hebben, dankjewel daarvoor.

Hierbij een kleine samenvatting van ons telefoongesprek;

Scotch and Soda staat open voor verduurzaming van de e-commerce verpakkings. In de traditionele retail gaat het al steeds iets duurzamer, denk aan grootschaliger verpakken; 30 kledingstukken in één zak i.p.v. individueel. Bij e-commerce is dit een lastiger punt, omdat alles individuele orders zijn.

Het doorzichtige plastic heeft een logistieke functie; het schoonhouden van de kleding en . De kleding is namelijk gemiddeld 3 weken onderweg vanuit bijvoorbeeld Chili. China

Vanaf Fall 2019 wordt er een kleine oplage/try-out gedaan van ocean biodegradable oxo biodegradable plastic. Dit soort is niet bedoeld om in de oceaan te gooien, maar als dat gebeurt, dan verteerd het na 3 jaar. Verder houdt het plastic dezelfde functie en wordt het na gebruik ook gewoon als plastic weggegooid. Voor nu is dit wellicht de beste optie, maar Scotch staat open voor nog meer verbetering. Financieel gezien zijn er geen obstakels.

Verder is er al gekeken naar het verteren van die informatieve stickers (4x2cm), deze kunnen worden meer genomen in het recycle proces van de plastic zakken. Ook de kleine zwarte letters op plastic zijn prima. De kleur zwart is normaal het lastigst te verwerken, maar dat geldt meer voor solide zwarte producten.

Nog enkele vragen;

- Zover jij weet, zijn er ongeveer 6 verschillende maten kartonnen dozen die de klant kan ontvangen bij een online bestelling. Zou je dit misschien kunnen navragen en waarom het bijvoorbeeld dit aantal formaten bijvoorbeeld is?
- Als een klant meerdere producten besteld, wordt het dan ook soms apart van elkaar verzonden? Zo ja, waarom? (Zo nee, zijn hier redenen voor?)
Een aantal jaar/seizoenen geleden had jij ook piepschuim waargenomen in verpakkingen, maar naar jouw weten wordt dat nu niet meer gebruikt. Toch nog een kleine verificatie; Welke **materialen** worden er precies gebruikt en hoeveel per pakket? (Karton (inclusief FSC keurmerk?), plastic, stickers, papier, schuimpapier, piepschuim, metaal, folie, etc) **witte schuimpjes**

Wat zijn de **commerciële intenties**/ideeën achter de tegenwoordige manier verpakken? Qua consumer engagement/betrokkenheid? **Design/brand identity**? Functioneel, het beschermen van het kledingstuk, ook is het openen van een pakje een gevoel dat het nieuw is.

Ik hoop dat ik alles goed begrepen heb en dat de extra vragen geen probleem zijn. Laat maar weten als er iets niet klopt.

Zou je het goed vinden als ik jou/Scotch and Soda eventueel vernoem in mijn scriptie? **prima**

Alvast heel veel dank en een fijne vakantie,

Met vriendelijke groet,

Anne Kwak
Hi Jana and Anne,

Hope you are enjoying your time in Mexico!

Anne, good to meet you and to know that you are interested in sustainability. If you could please let me know what are your thoughts and university requirements to work on your thesis on topics related to PVH, we can plan a call to discuss this.

Best Regards,

Diego

Diego Mora Navarro
Senior Corporate Responsibility Manager
Tommy Hilfiger Global/PVH Europe
Danzigerkade 165 | 1013 AP Amsterdam
diegornora@pvh.com | M: +31 6 50083797 | pvh.com

Diego Mora Navarro has let know that he was interested in me sharing what my foundings were on alternative sustainable options for the packaging within Tommy Hilfiger.
APPENDIX 2

VISIT TO MODEXPRESS, ARNOLD MANDERS, HELMOND, 29-04-2019

Hoi Arnold,

Heel erg bedankt voor de rondleiding en alle informatie en openheid van maandag! Ik heb er erg veel van geleerd.

Hierbij heb ik een samenvatting van de rondleiding en nog wat extra vragen (over het bedrijf, de merken en ideeën die ik heb). De observaties en vragen zijn natuurlijk vooral gericht in de gedachten van de merken, maar ik ben erg benieuwd wat uw kijk erop is, want u weet er tenslotte alles van;


De automatische machines en handmatige operaties voor zowel kleine als grote orders zagen er erg efficiënt en interessant uit! Je kan zien dat er goed over nagedacht is.

Wat mij vooral opviel, is dat plastic dus onvermijdelijk is tijdens het verpakkingsproces. Ook al versturen sommige brands hun producten zonder plastic naar de customer, het plastic is nodig tijdens het sorteren, zodat de kleding op zijn plaats/opgevouwen blijft en geen schade krijgt of tussen machines terecht komt. Als er returns binnenkomen, moeten deze weer in een nieuw plastic worden verpakt en bij samengestelde orders worden ook vaak nieuwe plastic zakken aangeschaft, omdat deze tijdens het proces per ongeluk kapot worden gemaakt.

Verder moeten er ook vaak kleine handelingen worden gedaan, zoals nieuwe stickers bevestigen inclusief prijs, of juist de prijs verbergen i.v.m. andere munteenheden. Dit zijn extra kleine handelingen en soms ook verspilling van tijd en materiaal. Dit is trouwens volkomen een ding dat ik opmerk vanuit opdracht van de merken zoals Suit Supply etc, niet vanuit ModeXpress.

Voor kleine en laag segment merken, spreekt het voor zich dat zij natuurlijk op zoek zijn naar de goedkoopste manier van verpakken en zullen zij al gauw kiezen voor de minst duurzame manier. (Gelukkig zijn de plastic zakken van Nak-d wel gerecycled en wordt dit ook gecommuniqueerd op de verpakking.) Bij de meer premium bedrijven merk je dat er al wat meer over nagedacht wordt en dat ze sowieso bezig zijn met mooiere manier van verpakken. Toch vind ik de verpakkingen nog tamelijk onhandig en wordt er niet goed gecommuniqueerd naar de klant wat zij er achteraf mee moeten doen.

Ook merk je dat niet elk verpakkingsdesign handelings vriendelijk is, voor de koerier en klant. De pakketten zijn vrij groot van formaat en niet alle verpakkingen hebben een handvat (plastic of karton). Soms is dit niet te voorkomen i.v.m. de grootte van de bestelling, maar in meeste opzichten wel.

Verder liet u ook de verschillende order en return formulieren zijn, ik vraag mij bijvoorbeeld af of er niet tegenwoordig al betere systemen voor dit zijn. Dat je alleen maar iets kan hoeft te
scannen op een mobiel, i.p.v. 2 loze papieren die binnen de eerste 2 minuten worden weggegooid, want de order informatie staat in principe aangegeven in je e-mail. Is dit bijvoorbeeld ook te vervangen voor de medewerkers of zijn deze fysieke papieren echt nodig om het overzicht te houden? In principe zouden computersystemen het kunnen vervangen? U vertelde namelijk ook over de merken die dan niet de return barcode van ModeXpress gebruiken, maar een eigen, wat eigenlijk in-effiënter is als producten geretourneerd worden.

Er gaat veel plastic, karton en papier verloren. Gelukkig wordt dit wel daarna naar verschillende recycle bedrijven (zoals Van Happen) gebracht, maar hoe mooi zou het zijn als dit in het bedrijf hergebruikt kan worden en er minder energie en transport verspild hoeft te worden aan het recyclen van deze materialen?

U vertelde dat het hergebruiken van verpakkingen geen probleem moet zijn, jullie volgen de instructies van de klant. Als zij dit willen, is dit te realiseren. U heeft een voorbeeld genoemd van een voormalig klant die een nog niet optimaal herbruikbare verpakking had die snel kapot ging (zoals ritsen) en het dan niet mogelijk is voor jullie als verpakkingsbedrijf om deze verpakking ter plekke te repareren. De verpakking moet dus wel goed getest zijn.

Hieronder nog losse vragen:
- Ik weet vanuit Scotch & Soda dat zij open staan voor duurzamere verpakkingen, ook financieel, maar alleen dus niet weten hoe. Weet u misschien van andere premium bedrijven waarvoor jullie verpakken of zij daar ook voor open staan?
- Hebben binnen het bedrijf werknemers een bepaalde kijk op de verpakkingen en wellicht ideeën hoe dit handiger/efficiënter/less wasteful kan? Waar lopen zij dagelijks tegenaan?
- Ik ben heel erg op zoek naar materiaal dat van de gemiddelde doos/plastic/energie qua uitstoot geven, zou ik eventueel het CO2 rapport van Suit Supply kunnen delen of is dit privacy schending? Dan kan ik een kleine inschatting maken.
- Ik vraag mij af wat de precieze prijzen zijn van verschillende plastics, kartonsoorten, foliopapiersoorten zijn. Zoals u vertelde ligt dat rond de €0,15 voor plastic en €0,50-€0,80 voor karton. Weet u de precieze prijzen hiervan? Van bijvoorbeeld conventioneel, recycled en biodegradable plastic? Ik wil graag vergelijken of dit heel veel verschilt van duurzamere opties en of het dus haalbaar is om deze te hergebruiken.
- Zoals ik vertelde dacht ik bijvoorbeeld aan afgekeurde kleding (dus preconsumer waste) dat gebruikt wordt als verpakking. Omdat dit flexibel is, dus minder ruimte inneemt en draagbaarder is. Dit is alleen onhandig i.v.m. transport stickers, want deze blijven niet pakken, dus een risico?
- Misschien is het mogelijk om dikker biodegradable plastic aan te schaffen met drukknopjes, zodat deze hergebruikt kunnen worden tijdens het verplaatsen van producten binnen het verpakkingsbedrijf. Dan moeten deze ook geïntroduceerd worden aan de fabrikanten van de merken, anders heeft het natuurlijk geen nut.
- Heeft u nog eventuele eigen input als het gaat om duurzaamheid in de e-commerce premium verpakkingen? Wat is uw ideale verpakking?
- Zou ik bijvoorbeeld over een paar weken verpakkingsontwerpen voor kunnen leggen en dat u of werknemers een oordeel geven over de gebruiksvriendelijkheid en of deze überhaupt realistisch uitwerktbaar zijn?

Losstaand hiervan, ik zou kunnen voorstellen aan mijn leraar of er animo is onder de leerlingen om langs te gaan bij ModeXpress?

Hopelijk is de mail nog te begrijpen, anders kan u mij altijd bellen of mailen,
Ik ben erg benieuwd naar uw antwoord,

Nogmaals heel erg dank voor uw en van de medewerkers’ inzet!!

Groetjes,

Anne Kwak
+31654627734
annekwak@icloud.com
APPENDIX 3

Unboxing phenomenon / trend on social media channels like Instagram and YouTube:
Consumer opening their parcel.

Consumer says that she does not care about the boring UPS envelop.
Brands using tissue paper as decoration for products.

Brands using nicely branded papers for personal messages.