Europeiska förpackningspreferenser 2020

En europeisk studie om vilka preferenser, uppfattningar och attityder konsumenter har gentemot förpackningar.

Print and Paper have a great environmental story to tell

TWO SIDES

Introduktion

I mars 2020 genomfördes en undersökning om förpackningspreferenser där 5.900 konsumenter tillfrågades av Toluna, ett fristående undersökningsföretag, på uppdrag av Two Sides.

De länder och antal tillfrågade som medverkade i undersökningen var: Österrike (500), Danmark (350), Frankrike (1.000), Tyskland (1.000), Italien (1.000), Norge (350), Sverige (350) och UK (1.000).

Undersökningens syfte var att få en djupare förståelse för hur konsumenter ser på förpackningar, vad de föredrar, inställning och så vidare.

Magnus Thorkildsen
Country Manager,
Two Sides Nordics.

David Linnér
Country Manager,
Two Sides Nordics.

"Förpackningar får mer uppmärksamhet än någonsin i strävan efter att nå en cirkulär ekonomi. Konsumenter blir allt mer medvetna om förpackningsalternativen för produkterna de köper, vilket i sin tur sätter press på företag, inte minst inom retail. Den kultur som funnits av att "tillverka, använda, slänga" håller sakta på att förändras.

Vi har genomfört en undersökning för att förstå hur konsumenter uppfattar olika sorters förpackningar. Undersökningen visade att pappersbaserade förpackningar föredras av konsumenten eftersom den är snällast mot miljön. Egenskaper som hållbarhet och möjligheten att kompostera, likväl som många praktiska faktorer spelar in i konsumentens preferens. Glas var också en favorit tack vare sin förmåga att skydda produkter och möjlighet till återanvändning. Plast, kanske inte helt oväntat, toppade ingen kategori.

Undersökningen visade också att konsumenter i hela Europa är villiga att ändra sitt beteende för att handla mer hållbart. Många är beredda att spendera mer på produkter som är förpackade i hållbara material. Och nästan hälften skulle undvika affärer som inte verkar göra tillräckligt. Denna beteendeförändring visar på vikten av att butiker och varumärken visar upp sina miljöansträngningar. Vi hoppas du ska finna rapporten intressant och användbar."

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Om Two Sides

Two Sides är en icke vinstdrivande global organisation som verkar för det de hållbara och attraktiva egenskaperna som finns hos trycksaker, papper och förpackningar.

Globalt har Two Sides över 600 medlemmar från den grafiska branschen, pappersindustrin och förpackningsindustrin och hela dess värdekedja. Ett 30-tal av dessa partners finns i Norden.

Kontakta Two Sides

Om du vill veta mer om rapporten och få tillgång till fler verktyg och material samt stötta vårt arbete kan du kontakta oss på **dl@twosides.info**

Key Findings

Packaging Preferences:

- Paper and cardboard packaging ranks highest with consumers for many sustainability factors including: *home compostable* (72%), *better for the environment* (62%) and *easier to recycle* (57%).
- Glass packaging is the preferred choice for factors including: *Reusable* (55%) and *better protection of products* (51%).

Consumer Behaviour:

- 70% of consumers are actively taking steps to reduce their use of plastic packaging.
- 48% of consumers would avoid retailers that are not actively trying to reduce their use of non-recyclable plastic packaging.
- 58% of Europeans believe non-recyclable packaging should be discouraged through taxation.

Online Shopping:

- 66% of consumers prefer products ordered online to be delivered in paper packaging rather than plastic packaging.
- 73% of consumers prefer products ordered online to be delivered in fitting packaging, i.e. not too big for the size of the actual product.

Recycling Perceptions:

- Paper/cardboard packaging is considered to be the most recycled material, with 30% of consumers believing the European recycling rate to be over 60% (85% of paper and cardboard packaging is recycled*).
- 23% of consumers believe glass has a recycling rate in excess of 60%. (Glass packaging has a recycling rate of 74%*).
- 17% of consumers believe metal has a recycling rate in excess of 60%. (Metallic packaging has a recycling rate of 80%*).
- Plastic is considered to be the least recycled packaging material. Although 12% of consumers overestimate the recycling rate of plastic, believing it to be over 60%. (Plastic packaging has a recycling rate of 42% in Europe*).

Environmental Labels:

- 64% are aware of the Forest Stewardship Council® (FSC®), and 55% are aware of the Programme for the Endorsement of Forest Certification™ (PEFC™). Europeans consider FSC slightly more important than PEFC.
- The Mobius Loop (recyclable) is the most recognised label in Europe, with 86% being aware of it. It is also rated the most important label by consumers.

The Shopping Bag:

- Consumers ranked paper bags highest for environmental factors such as: *recyclability* (52%), *compostability* (47%) and *made with renewable materials* (43%).
- Cotton/canvas bags were ranked highly on physical characteristics such as: *premium feel* (59%), *durability* (55%) and *attractiveness* (52%).

*Eurostat, 2017.

Packaging Preferences

The value of the European packaging market was €195 billion in 2018, forecast to reach €214 billion in 2023 (packagingeurope.com, 2019). Packaging plays an extremely important part in the purchasing decision, as it displays vital product information and is used to preserve or enhance product quality. Packaging can come in a variety of forms and the packaging industry is always innovating to meet the demands of the consumer.

The subject of sustainability has been prevalent in the packaging industry, as packaging tends to be disposed of when a product has been purchased and unpacked. Consumer perceptions of the environmental impact of different packaging materials is therefore important to understand.

In addition to understanding consumer perceptions of environmental attributes, such as a material's recyclability or compostability, respondents were also asked to choose their preferred materials based on practical and visual attributes, such as product protection and ease of opening/closing.

To begin, we asked respondents about 4 different packaging materials: paper/cardboard, glass, plastic, and metal. Looking at 15 different attributes, respondents were asked to match the material that they thought best suit each one. Of the 15 attributes, paper/cardboard was the average European favourite for 10, glass for 4, metal for 1, and plastic for none.

Paper/cardboard is the preferred material for the following 10 attributes

HOME COMPOSTABLE

72%

- **72%** chose paper/cardboard on average. Particularly strong in Austria (77%), Germany (74%) and Italy (76%).
- Glass is next highest at 6%.

BETTER FOR THE ENVIRONMENT

63%

- **63%** chose paper/cardboard on average. The preference is particularly strong in UK (69%), Italy (64%) and Denmark (69%).
- Glass is next highest preference at 27%.

LIGHTER WEIGHT

62%

- **62%** chose paper/cardboard on average. Particularly strong in Italy (69%), the UK (66%) and Austria (66%).
- Plastic is next highest at 26%.

EASIER TO RECYCLE

57%

- **57%** chose paper/cardboard on average. Particularly strong in the UK, Austria, Sweden and Norway (all 61%).
- Glass is next highest at 28%.

LESS EXPENSIVE

54%

- **54%** chose paper/cardboard on average. Particularly strong in the UK (63%), Italy (56%) and Sweden (58%).
- Plastic is next highest at 22%.

EASIER TO OPEN/CLOSE

41%

- **41%** chose paper/cardboard on average. Particularly strong in the UK (52%) and Finland (49%).
- Glass is next highest at 31%.

EASIER TO STORE

41%

- **41%** chose paper/cardboard on average. Particularly strong in Austria (52%), Italy (48%) and Germany (47%).
- Glass is next highest at 21%.

MORE PRACTICAL

40%

- **40%** chose paper/cardboard on average. Particularly strong in Italy (48%), Sweden (44%) and the UK (41%).
- Plastic is next highest at 26%.

SAFER TO USE

37%

- **37%** chose paper/cardboard on average. Particularly strong in Finland (56%) and the UK (53%).
- Glass is next highest at 31%.

BETTER PRODUCT INFORMATION

36%

- **36%** chose paper/cardboard on average. Particularly strong in Italy (49%) and Finland (42%).
- Glass is next highest at 21%.

Glass was the preferred material for the following 4 attributes

REUSABLE

55%

- **55%** chose glass on average. Particularly strong in Austria (70%) and France (66%).
- Paper is next highest at 22%.

BETTER PROTECTION

51%

- **51%** of consumers chose glass on average. Particularly strong in Italy (70%) and France (64%).
- Metal and plastic are the next highest at 15%.

PREFER LOOK AND FEEL

41%

- **41%** chose glass on average. Particularly strong in France (50%) and Austria (47%).
- Paper is next highest at 28%.

BETTER BRAND IMAGE

39%

- **39%** chose glass on average. Particularly strong in Germany (49%) and Italy (48%).
- Paper is next highest at 31%.

Metal was the preferred material for the following attribute

STRONGER/MORE ROBUST

51%

- **51%** of consumers chose metal, on average. Particularly strong in Finland (58%) and Norway (56%).
- Glass is next highest at 22%.

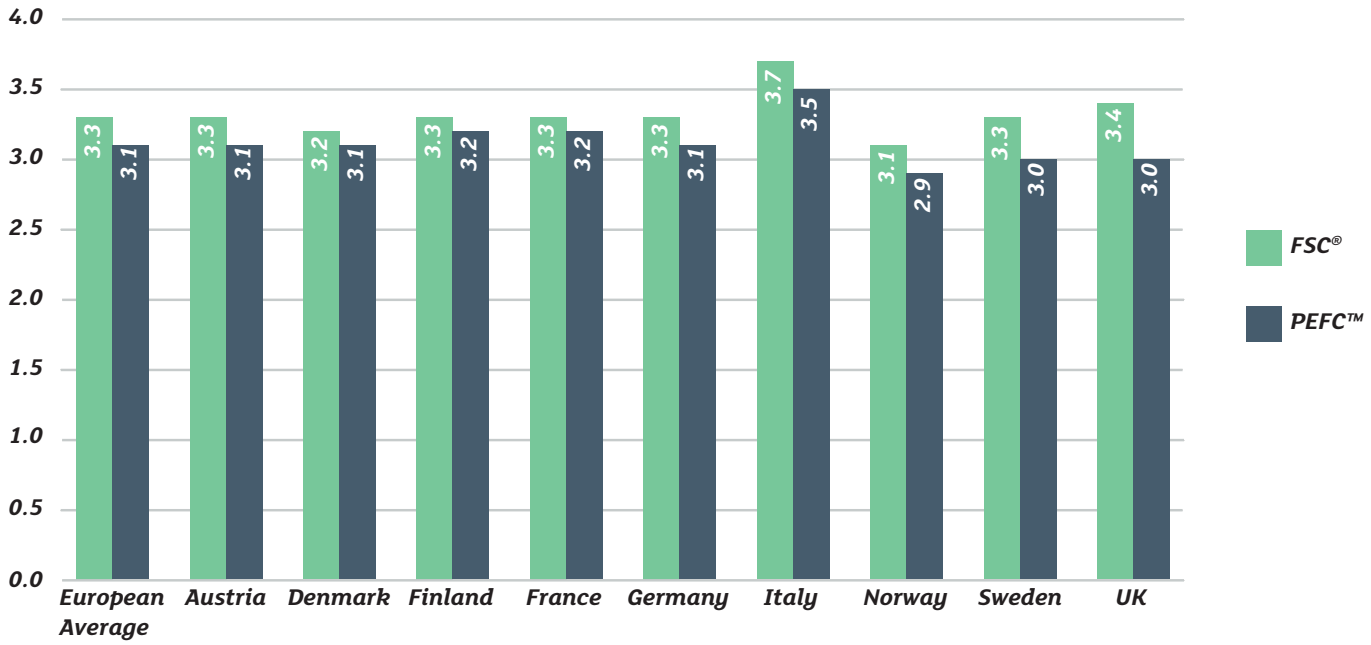
The Importance Of Environmental Labels

Environmental labels are an important factor of packaging as it allows consumers to understand the environmental attributes of a product or its packaging, which could influence their purchasing decisions. Environmental labels will include forest certification schemes, recyclability, and composability. Respondents were asked how important they perceived each environmental label to be.

Consumers were asked to rate a selection of environmental labels for importance, using a rating of 1 to 5 (1 for being least important and 5 for most important). They were also given the option of "unaware of this label".

The first two labels were in relation to forest certification schemes. 60% of European consumers are aware of the two main forest certification labels, which are the Forest Stewardship Council® (64% aware), and the Programme for the Endorsement of Forest Certification™ (55% aware).

Average ranking of importance for the FSC® and PEFC™ environmental labels by Country



FSC®

The survey found that 64% of European consumers are aware of this label. Countries with the most awareness of FSC are Italy (74%) and the UK (73%). Norway is the least aware of this label at 51%. Respondents aware of FSC gave it an average score of 3.5/5 for importance. It is perceived as most important in Italy (3.7/5) and the UK (3.4/5).

PEFC™

The survey found that 55% of European consumers are aware of this label. Countries with the most awareness of PEFC are Italy (67%) and France (60%). Norway is the least aware of this label at 41%. Respondents aware of PEFC gave it an average score of 3.1/5 for importance. It is perceived as most important in Italy (3.5/5) and France (3.2/5).

Mobius Loop

This label indicates that an object is capable of being recycled, not that the object has been recycled or will be accepted in all recycling collection systems.
Source: *Recycle Now*

86% of consumers are aware of the recyclable label (mobius loop) and gave it an average score of 3.7/5 for importance. This suggests that they are aware and place importance in the recyclability of packaging, regardless of the material. Finland (93%), Sweden (92%) and Italy (89%) are most aware of the mobius loop.

The Green Dot

The Green Dot does not necessarily mean that the packaging is recyclable, will be recycled or has been recycled. It is a symbol used on packaging in some European countries and signifies that the producer has made a financial contribution towards the recovery and recycling of packaging in Europe.
Source: Recycle Now

84% of respondents are aware of this label. The Green Dot also scored an average of 3.6/5 for importance. Consumers are most aware of this label in Germany (93%) and Austria (89%).

EU Ecolabel

The EU Ecolabel is a label of environmental excellence that is awarded to products and services meeting high environmental standards throughout their life cycle. The label promotes the circular economy.
Source: *European Commission*

61% of European consumers are aware of this label. The average score of importance for this label is 3.4/5. Consumers are most aware of the EU Ecolabel in Germany (93%), Austria (89%) and France (85%).

The Seedling (Compostable)

Products certified to be industrially compostable according to the European standard EN 13432/14955 may bear the 'seedling' logo.
Source: *Recycle Now*

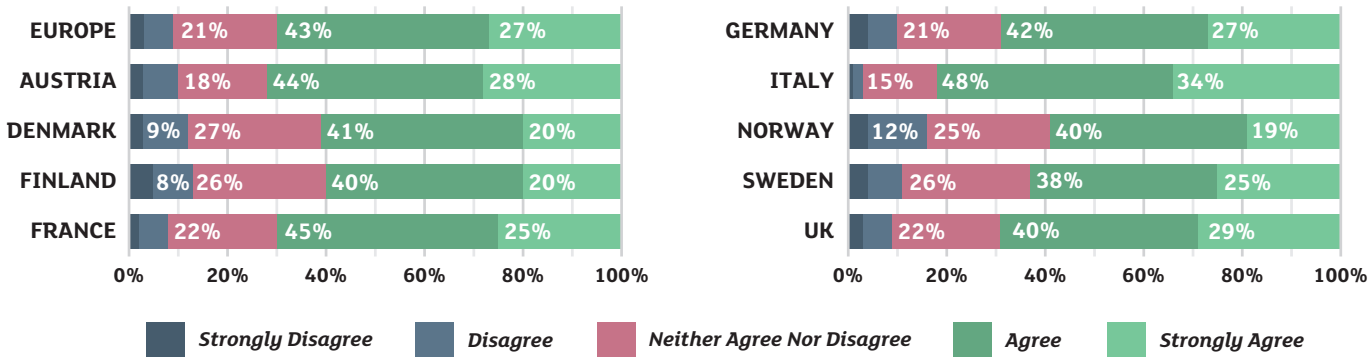
45% of European consumers are aware of this label, with an importance score of 3.1/5. Consumers are most aware of this label in Italy (60%), the UK (47%) and Finland (43%).

Consumer Packaging Behaviours

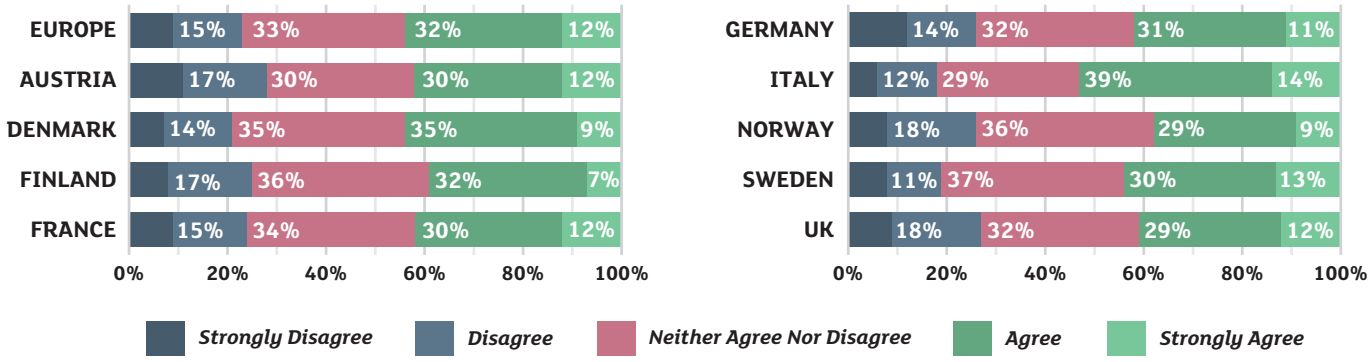
Consumer awareness of how packaging is impacting the planet is increasing, in part due to informative documentaries such as David Attenborough's Blue Planet 2. Since the BBC programme was broadcast in late 2017, packaging, and sustainability more generally, has played a significant part in governmental policies around the globe, as well as featuring heavily in the media, public discourse and throughout boardrooms.

The increasing number of environmentally conscious consumers, as well as governmental policies on reducing waste, is causing retailers and producers to drastically improve their green credentials. Respondents were asked to what extent they agree with the following series of statements:

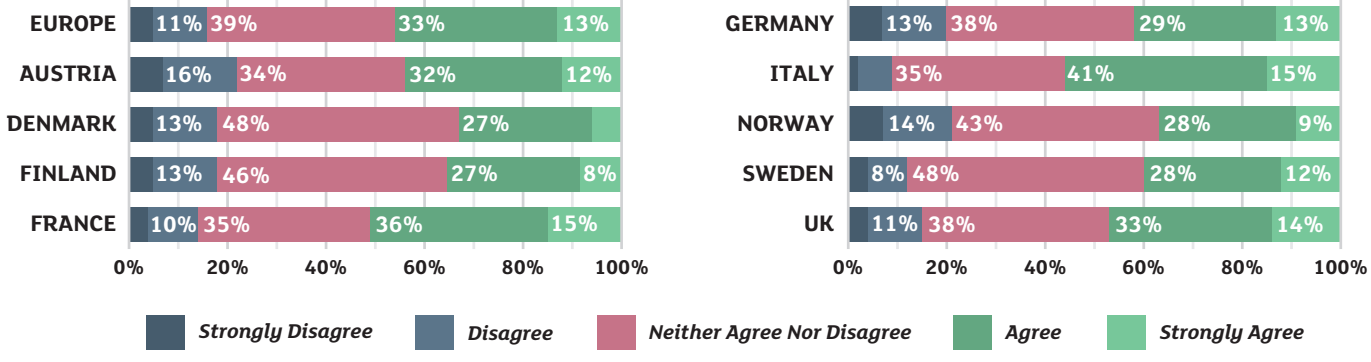
"I am actively taking steps to reduce my use of plastic packaging."
70% of respondents agreed, or strongly agreed.



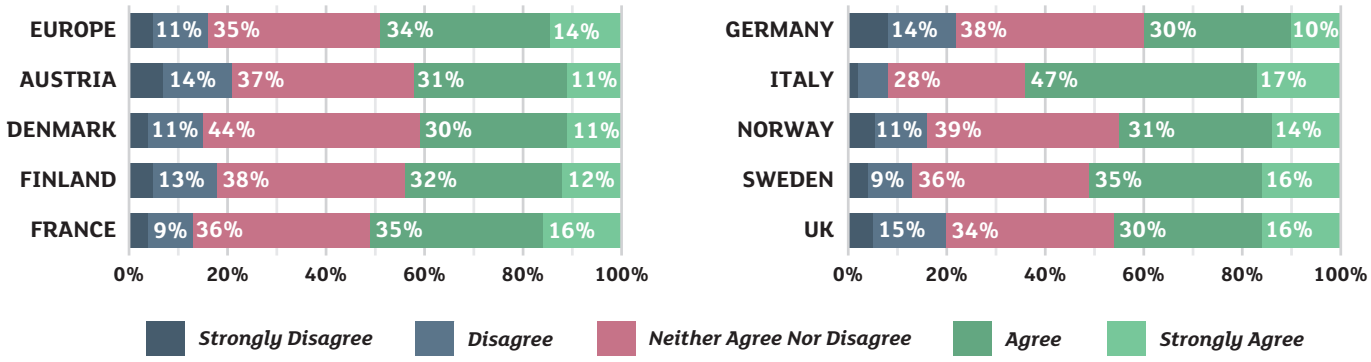
"I would be willing to spend more on a product if it were packaged using sustainable materials."
44% of respondents agreed, or strongly agreed.



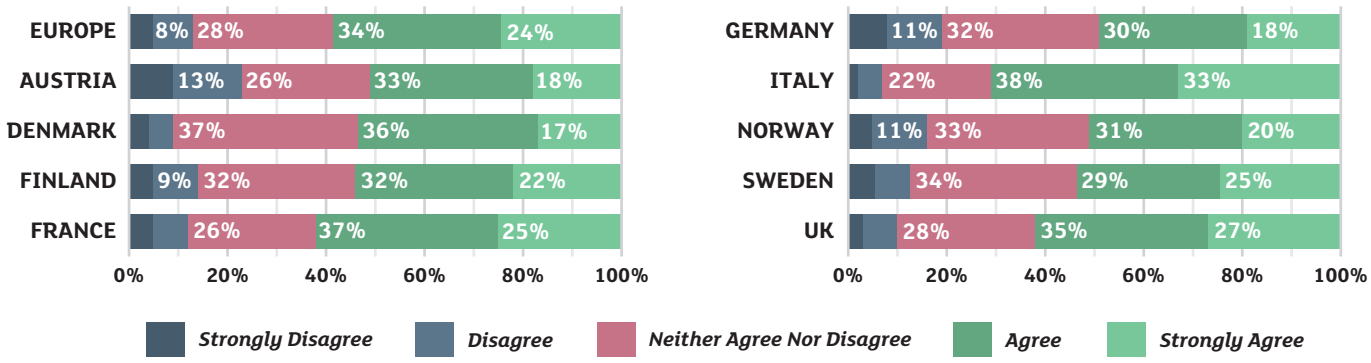
"I now buy more from retailers who are removing plastic from their packaging."
46% of respondents agreed, or strongly agreed.



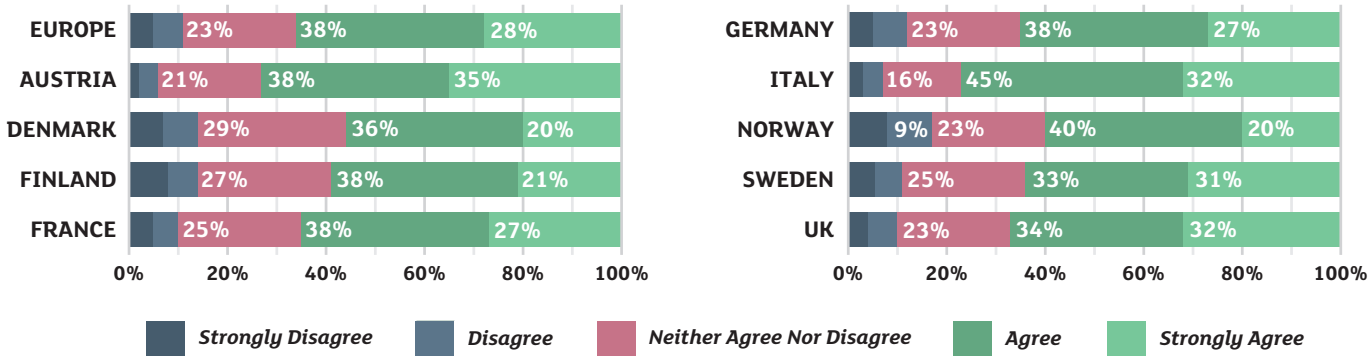
"I would consider avoiding a retailer if I knew they were not actively trying to reduce their use of non-recyclable plastic packaging."
48% of respondents agreed, or strongly agreed.



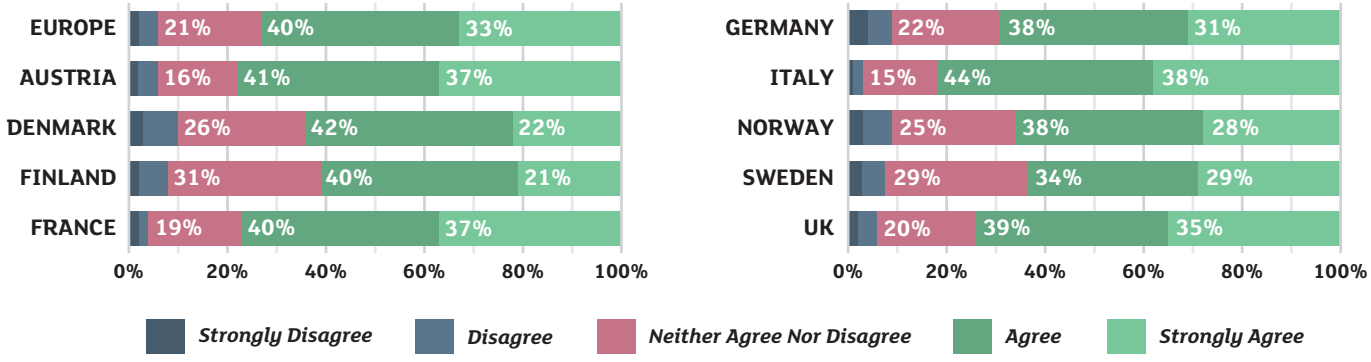
"Non-recyclable packaging should be discouraged through taxation."
58% of respondents agreed, or strongly agreed.



"I prefer products ordered online to be delivered in paper packaging rather than plastic packaging."
66% of respondents agreed, or strongly agreed.



"I prefer products ordered online to be delivered in a fitting packaging e.g. that is not too big for the size of the actual product."
73% of respondents agreed, or strongly agreed.



Perceptions Of Retailers' Efforts

Retailers, particularly supermarkets, throughout Europe have been improving their environmental commitments. We asked respondents which retailers they perceive to be doing the most to reduce their use of non-recyclable packaging. We have already established that this is important to consumers with an average of 48% stating they would consider avoiding a retailer if they were not taking steps to reduce their use of non-recyclable plastic packaging.

Overall, an average of 30% of respondents are unsure of the efforts retailers are making to increase their use of environmentally friendly packaging. Those in the Germany, Norway and the UK appear most uncertain. Those in Denmark appear most aware of retailers' efforts.

We asked consumers to rank retailers to establish which ones they believe to be putting in the most effort to increase their use of environmentally friendly packaging.

Retailers considered to be doing the most to increase their use of environmentally friendly packaging

Austria

1. Spar
2. Merkur
3. Hofer

Finland

1. S-Market
2. K-Market
3. Lidl

Norway

1. Kiwi
2. Coop
3. Meny

Denmark

1. Coop
2. Rema 1000
3. Lidl

Germany

1. Edeka
2. REWE
3. Kaufland

Sweden

1. ICA
2. Coop
3. Willys

France

1. Biocoop
2. Bio C'Bon
3. Naturalia

Italy

1. Coop
2. Esselunga
3. Conad

UK

1. Waitrose
2. Sainsburys
3. Tesco and Morrisons

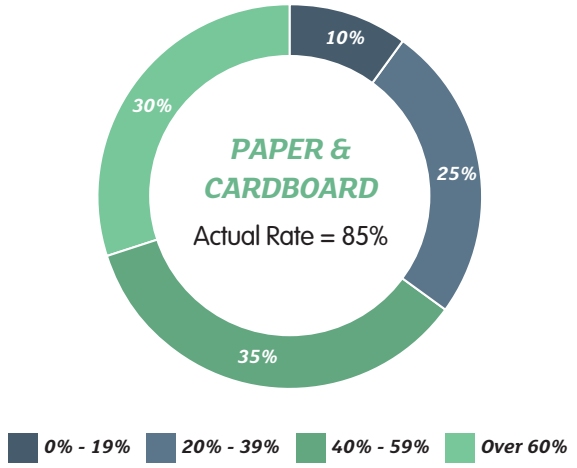
In every country, the average score for each retailer was between 2.5-3.5 out of 5. No retailers scored above 3.5/5, showing that consumers do not rate any retailer highly in concerns of their efforts to increase their use of environmentally friendly packaging.

Perceived Recycling Rates

Packaging that is irresponsibly disposed of has a negative impact on the natural environment. For instance, each year, at least 8 million tonnes of plastics leak into the ocean (Ellen MacArthur Foundation, 2016).

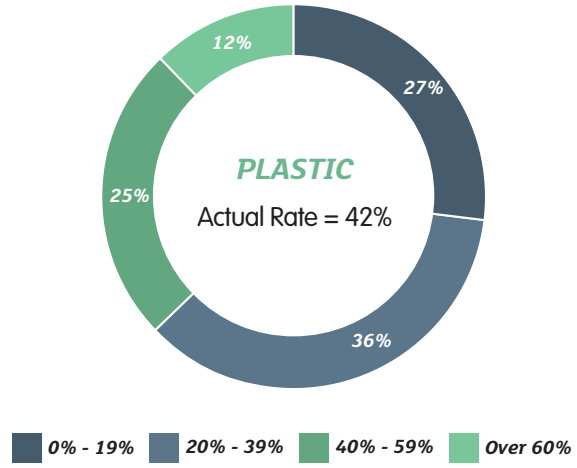
Recycling packaging enables the value of the materials to be maintained and avoids polluting the environment. In Europe, currently 67% of packaging (across all material types) is recycled.

The perceived recycling rate for paper/ cardboard packaging by European consumers



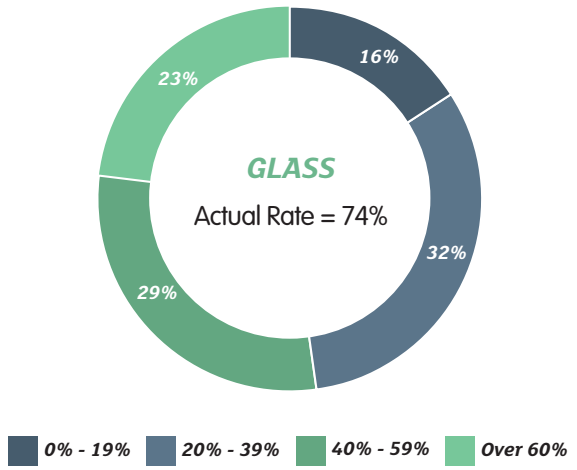
The survey revealed that paper/cardboard packaging is considered the most recycled by European consumers, with an average of 30% of respondents believing that the recycling rate is over 60%. However, just 9% of respondents believe the paper recycling rate to be more than 70%. 85% of paper/cardboard packaging is recycled in Europe*.

The perceived recycling rate for plastic packaging by European consumers



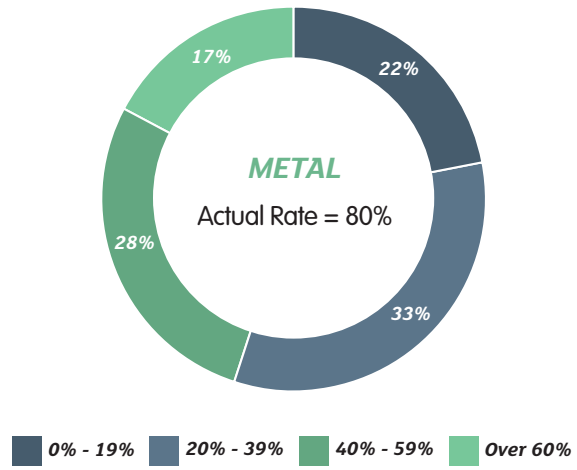
Overall, plastic is considered to be the least recycled packaging material. Although 12% of consumers overestimate the recycling rate of plastic, believing it to be over 60%. Plastic packaging has a recycling rate of 42% in Europe*.

The perceived recycling rate for glass packaging by European consumers



An average of 23% of respondents believe glass has a recycling rate over 60%. 74% of glass packaging is recycled in Europe*.

The perceived recycling rate for metal packaging by European consumers



An average of 17% of consumers believe metal had a recycling rate over 60%. 80% of metallic packaging is recycled in Europe*.

*Eurostat, 2017.

The Shopping Bag

Retailers have come under pressure to reduce their use of single-use plastics. This has resulted in attention turning to the shopping bags used after purchase, with retailers now offering plastic, paper, and canvas options. We asked consumers which attributes best suited the material options used for shopping bags to understand their preferences at check-out.

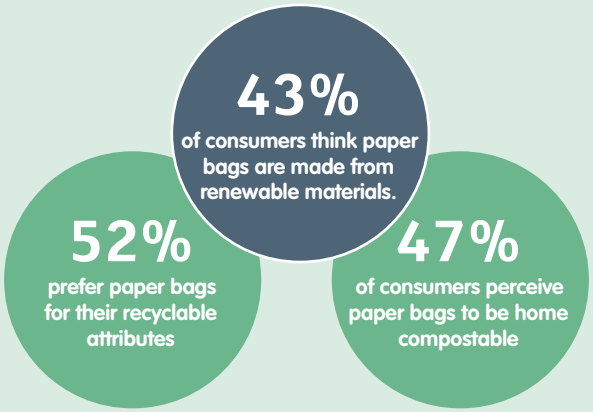
Consumers were asked their opinions on cotton/canvas, brown paper, white paper, lightweight plastic, and heavyweight plastic bags.

Whilst cotton bags were well liked for their attractiveness and durability, when it came to the impact on the environment, consumers favoured the paper bag for being recyclable, compostable and made from renewable materials.

Out of the 10 attributes, on average cotton/canvas bags are perceived best fit for 7, paper bags are perceived best fit for 3 and plastic bags best fit for none.

On environmental criteria, paper bags (brown paper bags and white paper bags combined) are the clear preference for 3 attributes:

- **Recyclable** – 52% prefer paper bags for this attribute, on average (58% in UK, 56% in France). Cotton/canvas and plastic bags are preferred by 23% of consumers for this attribute.
- Paper bags are also perceived as best fit, on average, for being **compostable** (47%) but results varied by country. There was a particularly strong preference in France (57%), Sweden (52%), the UK (50%) and Italy (49%).
- **Made with renewable materials** – 43% of respondents prefer paper bags for this attribute, on average (49% in Austria). Cotton/canvas bags are preferred by 33% of consumers for this attribute.



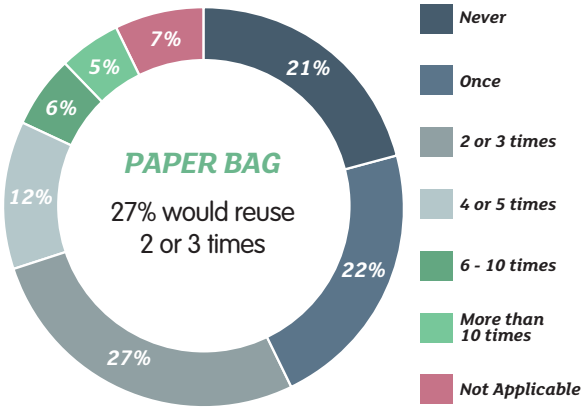
Cotton/canvas bags has the highest average rating across all countries for 6 attributes:

- **High quality/Premium feel** – 59% prefer cotton/canvas bags. Particularly strong preference in Austria (78%) and Germany (70%). Paper bags are preferred by 19% of consumers for this attribute.
- **Reusable** – 56% prefer cotton/canvas bags. Particularly strong preference in Austria (61%), Germany (64%) and Italy (60%). Both paper bags and plastic bags are preferred by 20% of consumers for this attribute.
- **Durable** e.g. strong/unlikely to break – 55% prefer cotton/canvas bags. Particularly strong preference in Austria (69%) and Germany (63%). Plastic bags are preferred by 26% of consumers and paper bags by 17% for this attribute.
- **'I prefer this type of bag'** – 53% simply prefer cotton/canvas bags on average (Austria 60%). 21% prefer plastic bags and 20% prefer paper bags.
- **Attractive** e.g. colours/branding – 52% on average prefer cotton/canvas bags. There is a particularly strong preference in Austria (69%) and Germany (63%). In comparison, paper bags were preferred by 24% of consumers for attractiveness (up to 34% in Italy).
- **Enhances the quality of the purchased goods carried with the bag** – 50% prefer cotton/canvas bags. Particularly strong preference in Austria (65%) and Germany (60%). Paper bags are preferred by 24% of consumers for this attribute.
- **Low carbon footprint** - 41% perceive cotton/canvas bags to have a low carbon footprint. Particularly strong in Germany (55%) and Austria (58%). Paper bags is preferred by 36%.

Plastic is the least preferred option across all 10 attributes. However, respondents ranked plastic higher for durability (25%) than paper bags (17%).

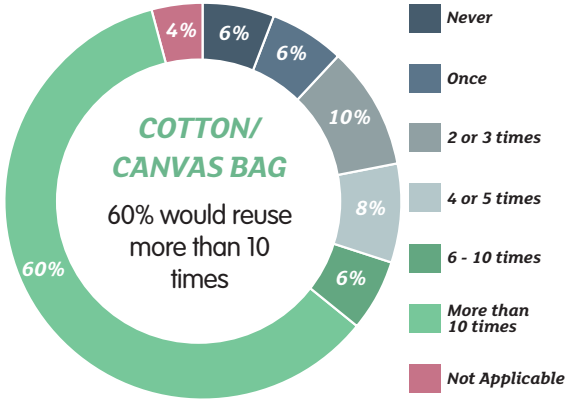
Consumers were also asked how often they re-use each type of shopping bag. The number of times that paper and plastic bags are re-used varies. Consumers claim to re-use cotton/canvas bags the most (more than 10 times).

The average amount a paper bag is reused among European consumers



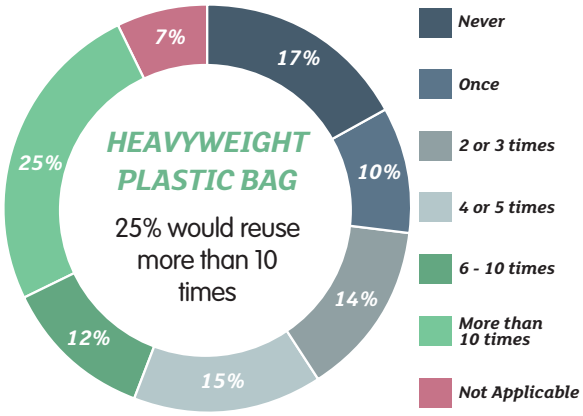
Paper Bags: 27% respondents said they would reuse a paper bag 2 or 3 times, followed by 22% who would use it once.

The average amount a cotton/canvas bags is reused among European consumers



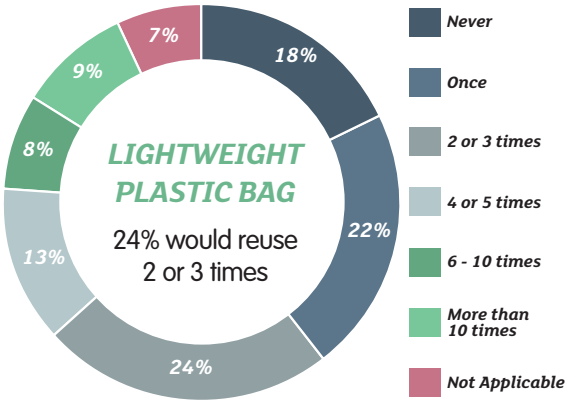
Cotton/Canvas: 60% of respondents would reuse a cotton/canvas bag more than 10 times, followed by 10% who would use it 2 or 3 times.

The average amount a heavyweight plastic bags is reused among European consumers



Heavyweight plastic bags: 25% of respondents would reuse a heavyweight plastic bag more than 10 times, followed by 17% who would never reuse it.

The average amount a lightweight plastic bags is reused among European consumers



Lightweight plastic bags: 24% of respondents would reuse a lightweight plastic bag 2 or 3 times, followed by 22% who only use it once

In recent years, there has been growing recognition of the impact of single-use packaging, particularly plastic, has on the environment. Relatively little plastic packaging is recycled (42% European average in 2017 and just 14% globally) and when discarded irresponsibly, it is a significant contributor to marine pollution.

Although it is better for the environment to reuse shopping bags to reduce waste, it's also important to look at the full life cycle of each shopping bag to understand its true impact on the environment. For instance, research suggests that cotton bags need to be used at least 50 times to achieve the same climate performance as paper bags (The Danish Environmental Protection Agency, Life Cycles Assessment of grocery carrier bags, 2018).

Closing Summary

The findings suggest that consumers are becoming more aware of the impact that packaging is having on the environment, particularly in relation to single use and non-recyclable packaging. Most are actively taking steps to reduce their use of plastic packaging (70%), but also, they recognise that paper/cardboard can be a more sustainable option. 62% perceived paper/cardboard to be better for the environment, 57% perceived it as being easier to recycle, and 72% recognising that it is home compostable.

There is an increasing level of pressure on retailers to increase their use of environmentally friendly packaging, with 48% of consumers agreeing that they would consider avoiding a retailer if they knew they were not actively trying to reduce their use of non-recyclable packaging. Additionally, 58% of consumers agreed that non-recyclable packaging should be discouraged through taxation.

The findings in relation to recycling rates also suggest paper/cardboard as being the most recycled packaging material in Europe. However, a significant amount of consumers still underestimate the recycling rates of paper, glass and metal packaging, meaning more needs to be done by these industries to improve perceptions and understanding.

For more research and reports from Two Sides, please visit **www.twosides.info**

About Two Sides

Two Sides is a not for profit global initiative promoting the unique sustainable and attractive attributes of print, paper and paper packaging.

Globally, Two Sides has over 600 members spanning the print, paper and packaging value chain including: forestry, pulp, paper, packaging, inks and chemicals, finishing, publishing, printing, envelopes and postal operators.

Contact Two Sides

If you would like to learn more about this report or find out about the many other tools and resources Two Sides produce, please get in touch.

+44 (0)1327 262920
enquiries@twosides.info
www.twosides.info
@TwoSidesUK

Contact

Two Sides Europe

Two Sides UK
iCon Centre
Eastern Way
Daventry
NN11 0QB
United Kingdom

Please contact Jonathan Tame;
Telephone: +44 (0) 1327 262920
Email: jonathan@twosides.info

Two Sides Germany
Fasanenweg 3
21227 Bendestorf
Germany

Please contact Anne-Katrin Kohlmorgen;
Telephone: +49 (0) 40 4140 639-11
Email: anne@twosides.info

Two Sides Italy
Bastioni di Porta Volta, 7
20121 Milano
Italy

Please contact Massimo Ramunni;
Telephone: +39 02 29003018
Email: massimo@twosides.info

Two Sides France
23-25 rue d'Aumale
75009 Paris
France

Please contact Jan Le Moux;
Telephone: +33 (1) 53 89 24 00
Email: jan@twosides.info

Two Sides Austria
Gumpendorfer Strasse 6
1060 Wien
Austria

Please contact Patrick Mader;
Telephone: +43 1 588 86 273
Email: patrick@twosides.info

Two Sides Nordics
Upplandsgatan 84
113 44 Stockholm
Sweden

Please contact Magnus Thorkildsen;
Telephone: 00 47 97 58 70 85
Email: magnus@twosides.info

Two Sides International

Two Sides North America
330 North Wabash Avenue
Suite 2000
Chicago, Illinois 60611
USA

Please contact Phil Riebel;
Telephone: 855-896-7433
Email: phil@twosidesna.org

Two Sides Brazil
Rua Bresser, 2315
São Paulo - São Paulo
Brasil
CEP 03162-030

Please contact Fabio Mortara;
Telephone: 55 11 97206-4746
Email: fam@twosides.org.br

Two Sides Australia & New Zealand
Suite 6
151 Barkly Avenue
Richmond VIC 3121

Please contact Kellie Northwood;
Telephone: 03 9421 2209
Email: kellie@thermc.com.au

Two Sides South Africa
575 Lupton Drive
Midrand
Johannesburg
1682

Please contact Deon Joubert;
Email: deon@za.twosides.info

For more information, please get in touch:
+44 (0)1327 262920
enquiries@twosides.info
www.twosides.info
@TwoSidesUK

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