

**PRO CARTON**  
PACKAGING FOR  
A BETTER WORLD

# Rethinking Packaging: A Consumer Study



- **PRO CARTON – INTRODUCTION**
- **CONSUMER STUDY NOVEMBER 2022**
- **CONSUMER SENTIMENT**
- **ENVIRONMENTAL CONCERNS**
- **ATTITUDE ADJUSTMENTS**
- **PACKAGING PERCEPTIONS**
- **WHY CARTONS?**



# Pro Carton

## European Association of Carton and Cartonboard Manufacturers

Pro Carton is the European Association of Carton and Cartonboard manufacturers. It represents members of over 40 mills in 14 countries in Europe accounting for more than 95% of European cartonboard production and the carton converting industry.

Pro Carton promotes the functionalities and benefits of cartons and cartonboard to brand owners, the trade as well as designers, the media, and EU policymakers as a renewable, recyclable, and competitive packaging material.

Pro Carton members fully support sustainable forest management as an important pillar to mitigate negative impacts of climate change, preserve bio-diversity and promote forest growth.

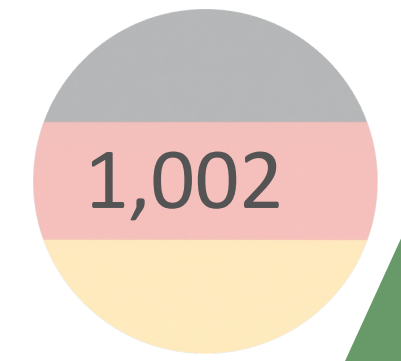
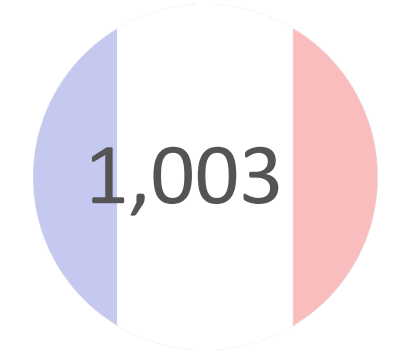
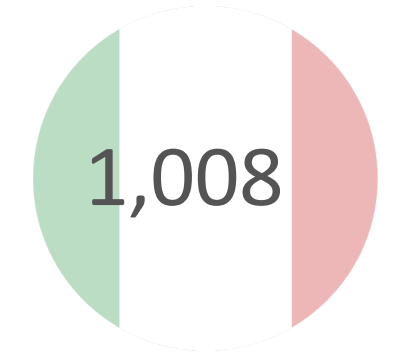
Pro Carton highlights innovative uses of carton and cartonboard by students, designers and brands through its annual awards programmes, attracting young talents to our green industry.



# Consumer Perceptions

A pan-European study

**+5000 CONSUMERS POLLED**  
**FIVE COUNTRIES**  
**EXCLUSIVE INSIGHTS**  
**PACKAGING PERCEPTIONS**  
**ENVIRONMENTAL ATTITUDES**  
**KEY TRENDS AND CHALLENGES**  
**CONDUCTED IN NOVEMBER 2022**





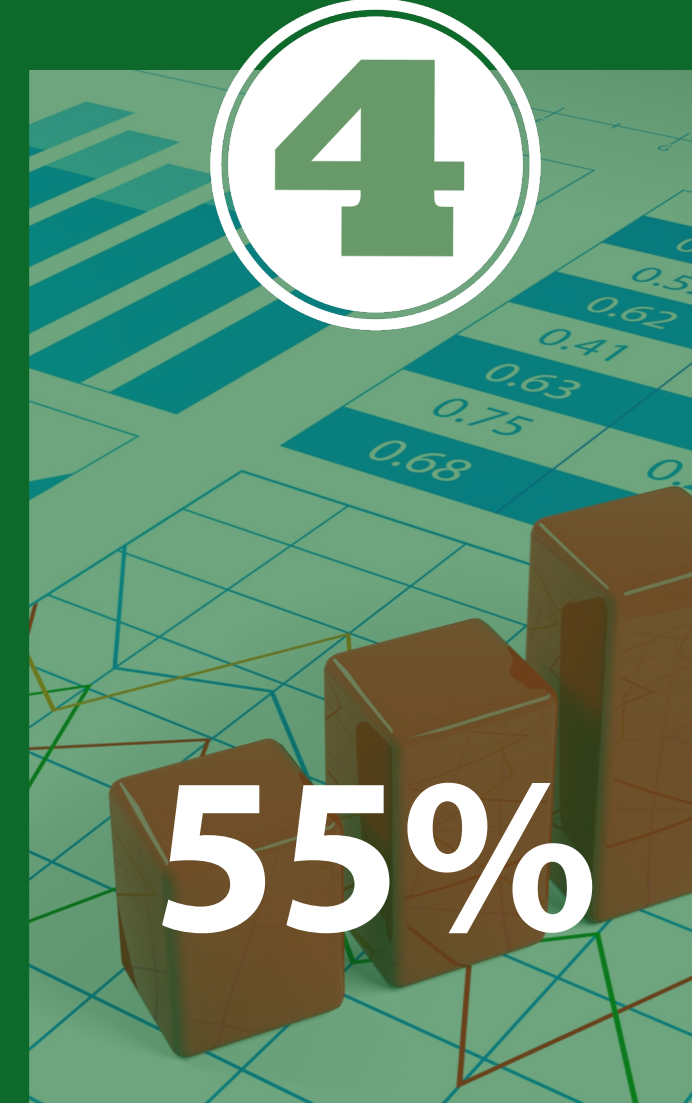
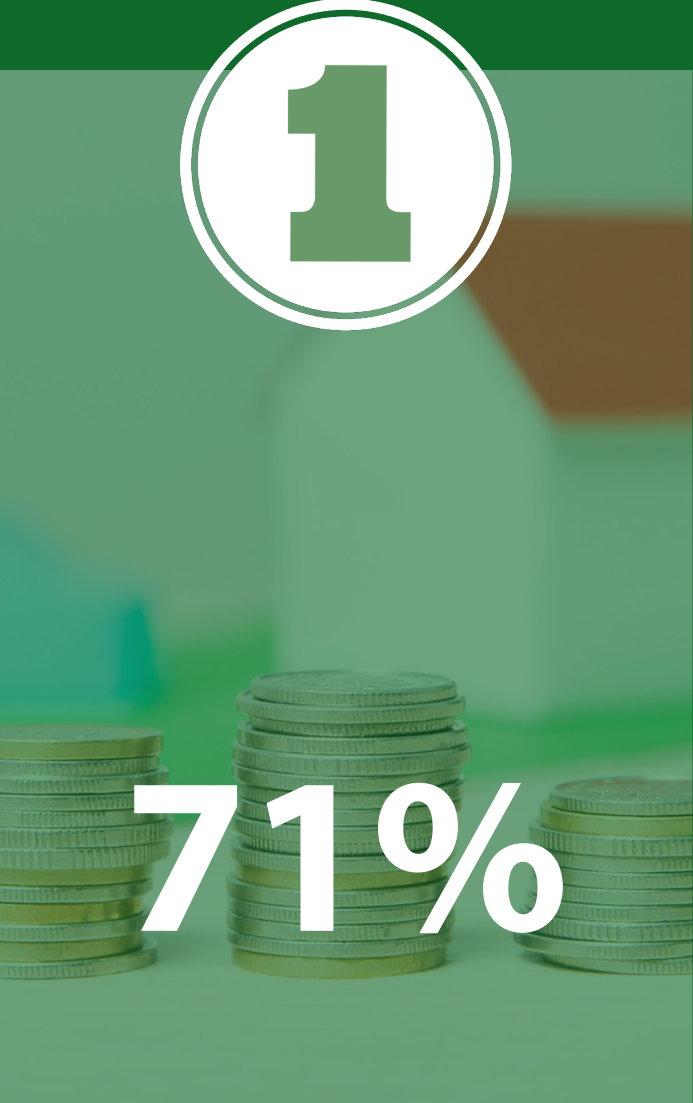
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**Consumer Concerns:  
What is keeping consumers  
awake at night?**



# What are the biggest issues facing us today?

Pandemic is no longer in Top 5 – 2022 is the year of inflation, extreme climate and warfare



**COST OF LIVING**

**CLIMATE CHANGE**

**WARFARE**

**THE ECONOMY**

**POVERTY**

Multiple answers possible

# Concerns on plastics remain high on the alert list

Pandemic and refugees moved down the ranking



41%



39%



35%



33%



29%

**PLASTICS IN THE OCEAN**

**PANDEMICS**

**IMPACT OF PLASTIC PACKAGING**

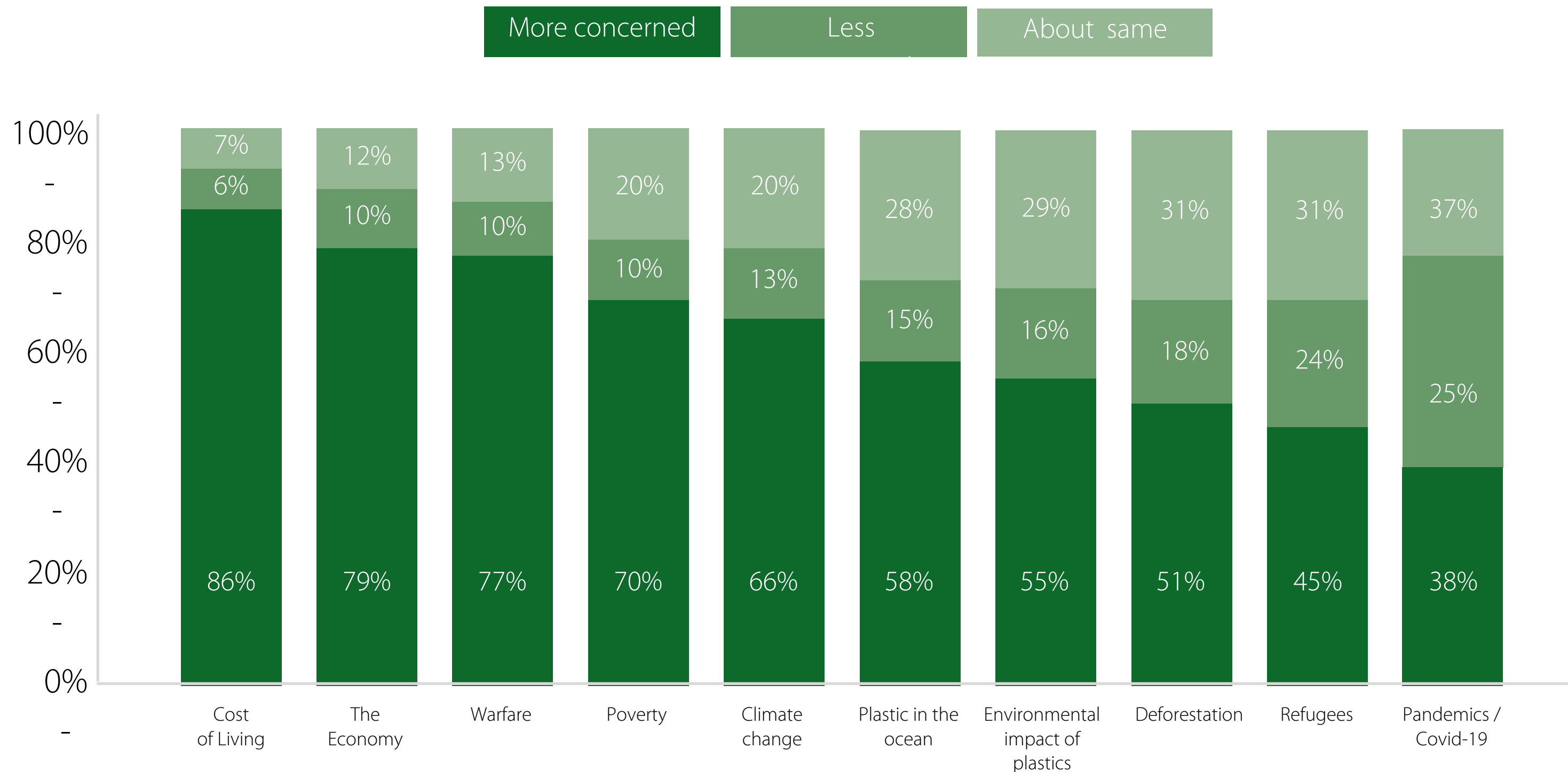
**DEFORESTATION**

**REFUGEES**

Multiple answers possible

# Inflation, Warfare and Poverty are new in Top 10 list

In the last 12 months, have you become more or less concerned about...





# On Packaging - Who is in charge for our environment?

Strong believe in market forces

**92%**

An overwhelming majority of respondents believe packaging producers and brand owners should do more to help the environment.



**59%**

A LOT MORE



**33%**

A BIT MORE

**8%**

Meanwhile, less than 10% believe it is the responsibility of local Government's to enact change.



# Attitude Adjustments

What can companies/brands do to help?

**1**

**Use more renewable materials**

**2**

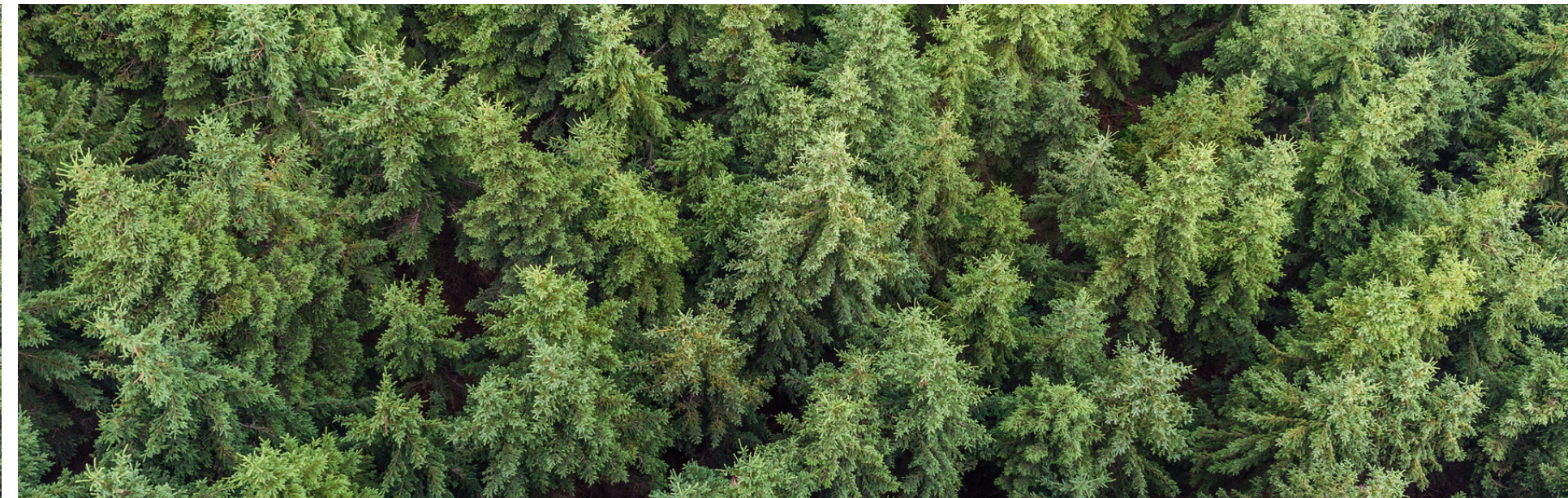
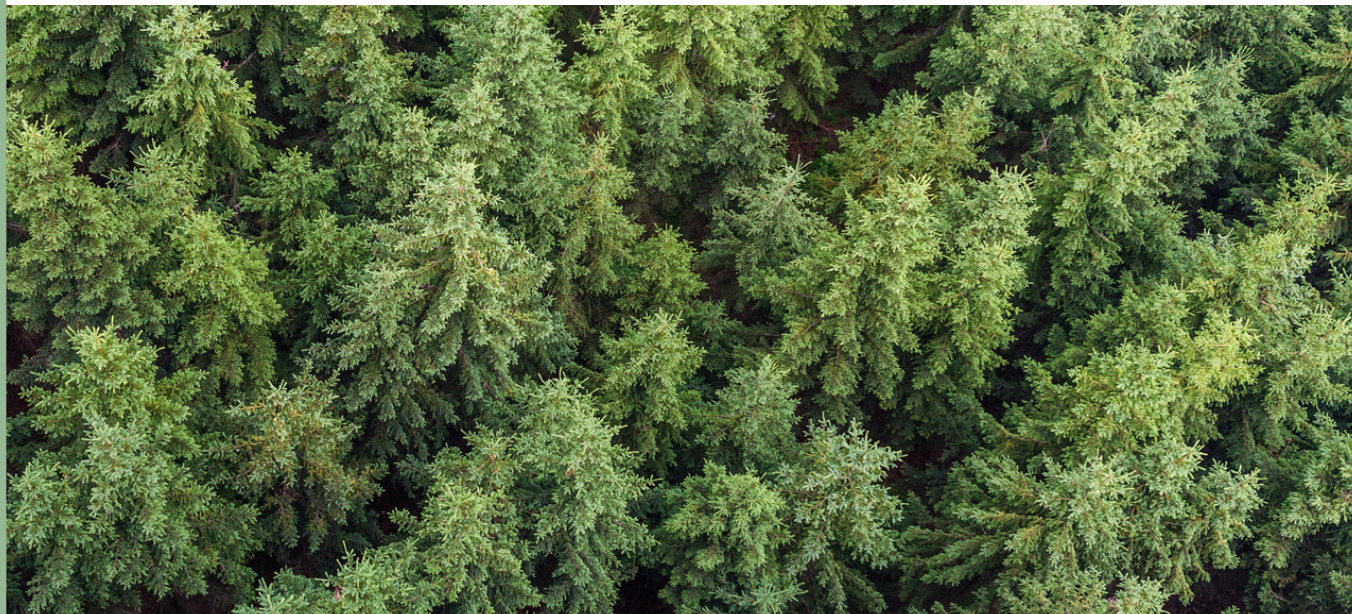
**Use less man-made materials such as plastic**

**3**

**Display clear instructions on how to recycle the packaging**

**4**

**Add a colour code to the package to show the environmental impact of the product, including its packaging**





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**Required Actions:**  
**Consumers have a clear idea**



# Actions required to stop climate change

Top 3 remain unchanged – change only in order

- 1** Recycle more
- 2** Plant more trees
- 3** Use more renewable materials
- 4** Use less man-made materials such as plastic
- 5** Transition from fossil fuels to renewable energy
- 6** Use public transportation instead of driving
- 7** Ditch petrol/diesel in favour of electric
- 8** Eat less meat



2019 Findings:

- 1** Plant more trees
- 2** Recycle more
- 3** Use more natural renewable materials

# Attitude Adjustments

## Environmental Concerns

Consumers are passionate about the environment and are more sensitive to the environmental impacts of their shopping decisions.

63%

Over half of European consumers say living a sustainable lifestyle has become more or very much more important to them in the past 12 months.

74%

Almost three quarters of European consumers believe we are not doing enough to stop the harmful effects of climate change.



# Consumers make important choices

What have you done more of in the past 12 months...



**RECYCLE MORE OF  
HOUSEHOLD WASTE**



**USE LESS  
WATER**



**REDUCE PRODUCTS  
PACKED IN  
PLASTICS**



**PURCHASE  
LOWER COST  
ALTERNATIVES**



**BUY PRODUCTS IN  
ENVIRONMENTALLY  
FRIENDLY  
PACKAGING**

Multiple answers possible

# Consumers take action

Witnessing a step-change

## 58%

European consumers are recycling more than 12 months ago.

## 54%

Over half of European consumers say the environmental impact of a product's packaging has become more important in the last 12 months.

## 47%

One in two consumers have switched brands or products in the last 12 months because of concerns about the packaging used.



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# **Packaging Perceptions:** What consumers want you to know





**In the past 12 months, have you chosen a brand specifically for the packaging used?**

**Yes, 47%!**

**Packaging plays an important role for creating brand loyalty**

# Packaging impacts purchasing decisions

Reasons for switching brands/products

**PACKAGING WAS NON-RECYCLABLE** 50%

**PRODUCT OR BRAND HAD UNNECESSARY PACKAGING** 45%

**PRODUCT OR BRAND USES PLASTICS** 43%

**REFILL/REUSABILITY OPTIONS AVAILABLE WITH DIFFERENT BRANDS** 41%

**BRAND DOES NOT HAVE AN ENVIRONMENTALLY FRIENDLY ETHOS** 31%

Multiple answers possible



# Recycling and sourcing are most important

Packaging features ranked by importance

**EASY TO RECYCLE** 85%

**MADE FROM RENEWABLE MATERIALS** 81%

**PROTECT THE PRODUCT** 81%

**PROVIDE NUTRITIONAL INFORMATION** 78%

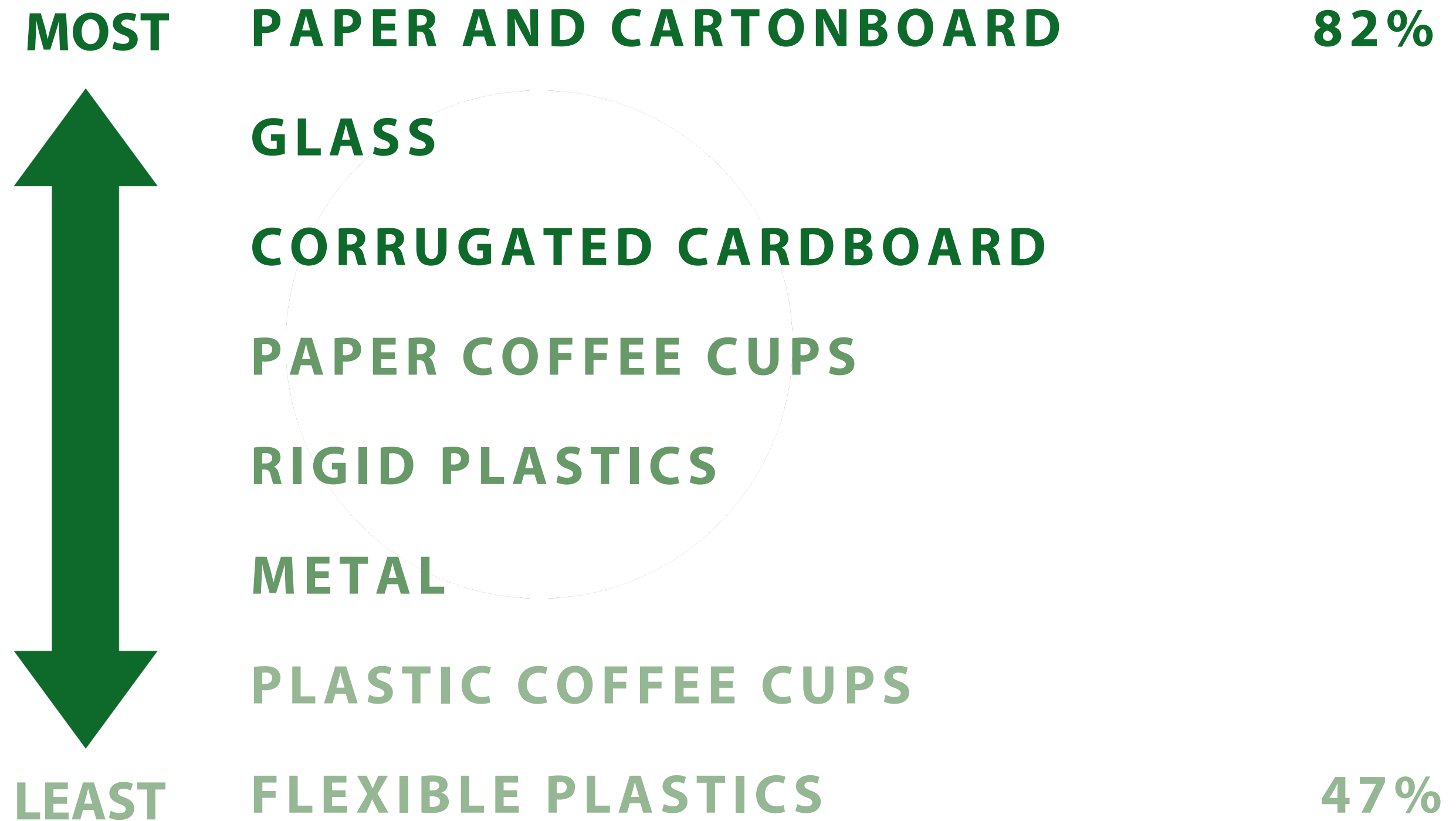
**PACKAGING IS RESEALABLE** 76%

**EASY TO OPEN** 68%

**PROVIDE BRAND INFORMATION** 65%

# Consumers trust cartonboard collection/recycling

How confident are you that the following materials are recyclable?



**If the same product was packaged in two different forms of packaging - one in plastic and one in cartonboard, which one would you choose?**

**Carton  
Packaging**

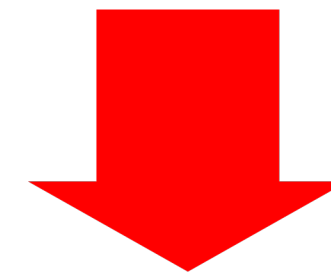
**86%**



**Up from 81% in 2019**

**Plastic  
Packaging**

**14%**



**Down from 19% in 2019**

# Money Talks

Are consumers willing to pay more?

**72%**  
would pay more





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## **Why Cartons?**



# Cartons are leading in circularity



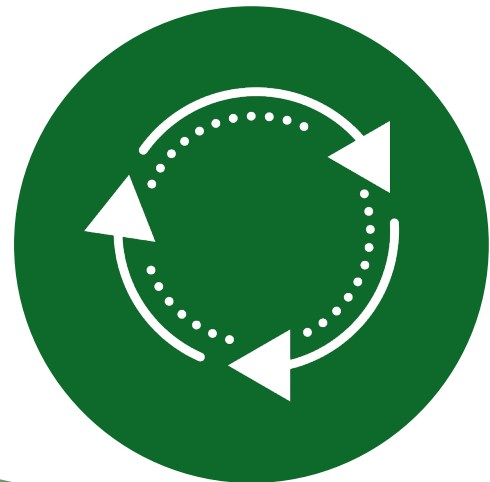
## **82% Recycling Rate**

Consumers trust an efficient collection and recycling system. Paper and board is the **most recycled packaging material in the EU** - 82% (Eurostat 2019). Target to further increase to 90% by 2030.



## **High Resilience of Paper Fibres**

According to research by TU Graz, the fibres that make up cartonboard **can be recycled more than 25 times**.



## **Leadership in Circularity**

From the forest to cartonboard, to the folding carton, to the retailer, to the consumer and back to recycling in the carton value chain. The cartonboard industry is a **strong leader in the circular economy**.





# Sustainable forest management: the core of our business

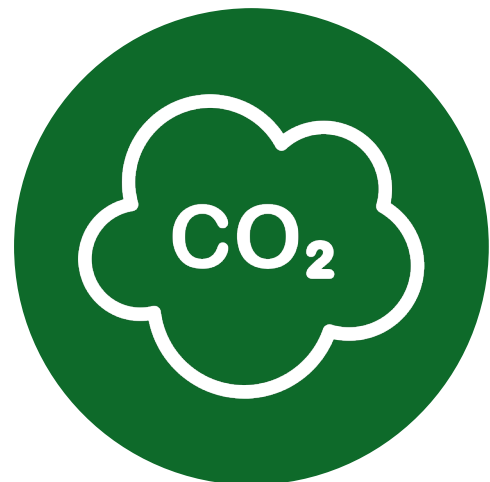


## Driving Sustainable Forest Management

More than 90% of the wood fibres used in the European paper and board industry come from EU forests, none from rain forests.

New forest growth in Europe exceeds the wood harvested by an area equivalent to 1,500 football pitches every day.

European fibre-based industry drives sustainable forest management

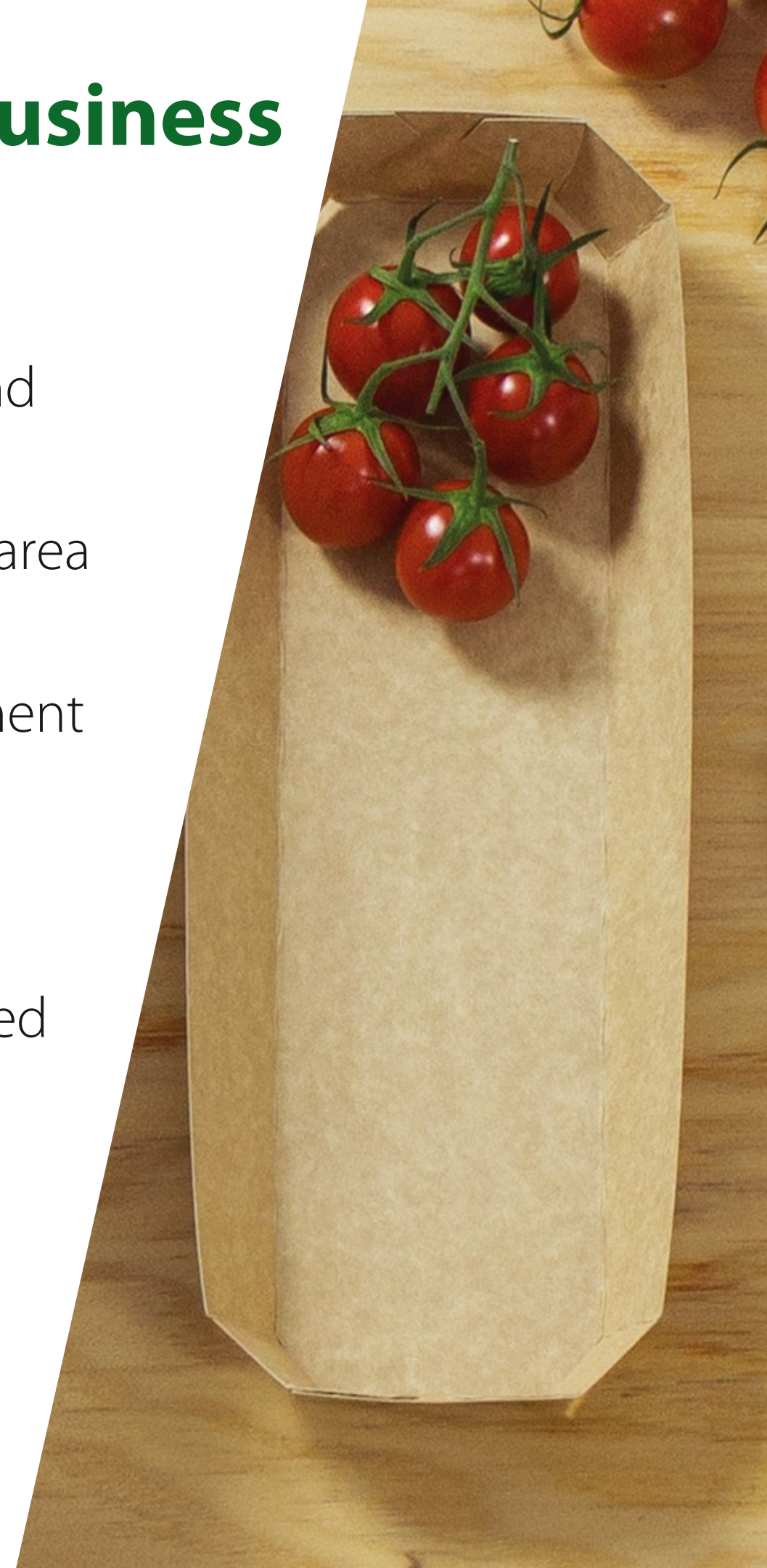


## Reduced Emissions

Direct CO2 emissions of the European fibre-based industry reduced by 26% between 2005 and 2020.

First mills in Scandinavia produce carbon neutral.

Regular CO2 footprint studies to measure progress.



# **Cartons are “future ready”. Today.**

- **Cartonboard offers solutions to meet future challenges**
- **Increased number of applications by innovations in new categories**
- **Fully supporting EU Green Deal**
- **In line with consumer’s expectations**
  - **Renewable materials from sustainably managed forests**
  - **Trusted and credible collection and recycling system**
  - **Leading in Circularity**





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## **Rethinking Packaging: Solutions for Today and the Future**

For regular updates please follow Pro Carton on  
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You find more information under [www.procarton.com](http://www.procarton.com)

