



PRO CARTON
PACKAGING FOR
A BETTER WORLD

The Power of Packaging What Makes European Consumers Trust, Stay, or Switch?

EUROPEAN CONSUMER PACKAGING PERCEPTIONS SURVEY 2026

THE SIXTH ANNUAL SURVEY BY PRO CARTON

About Pro Carton



As the European Association of Carton and Cartonboard manufacturers, Pro Carton represents members operating 50+ board machines across more than 40 mills in 15 European countries and North America, as well as the carton converting industry.

Its purpose is to promote the use of cartons and cartonboard to brand owners, the trade as well as designers, the medium, and policymakers as an economically and ecologically balanced packaging medium, that is renewable, circular and recycled.

Pro Carton also highlights innovative the use of folding cartons and cartonboard by students, designers and brands through its annual awards programme.



About the study

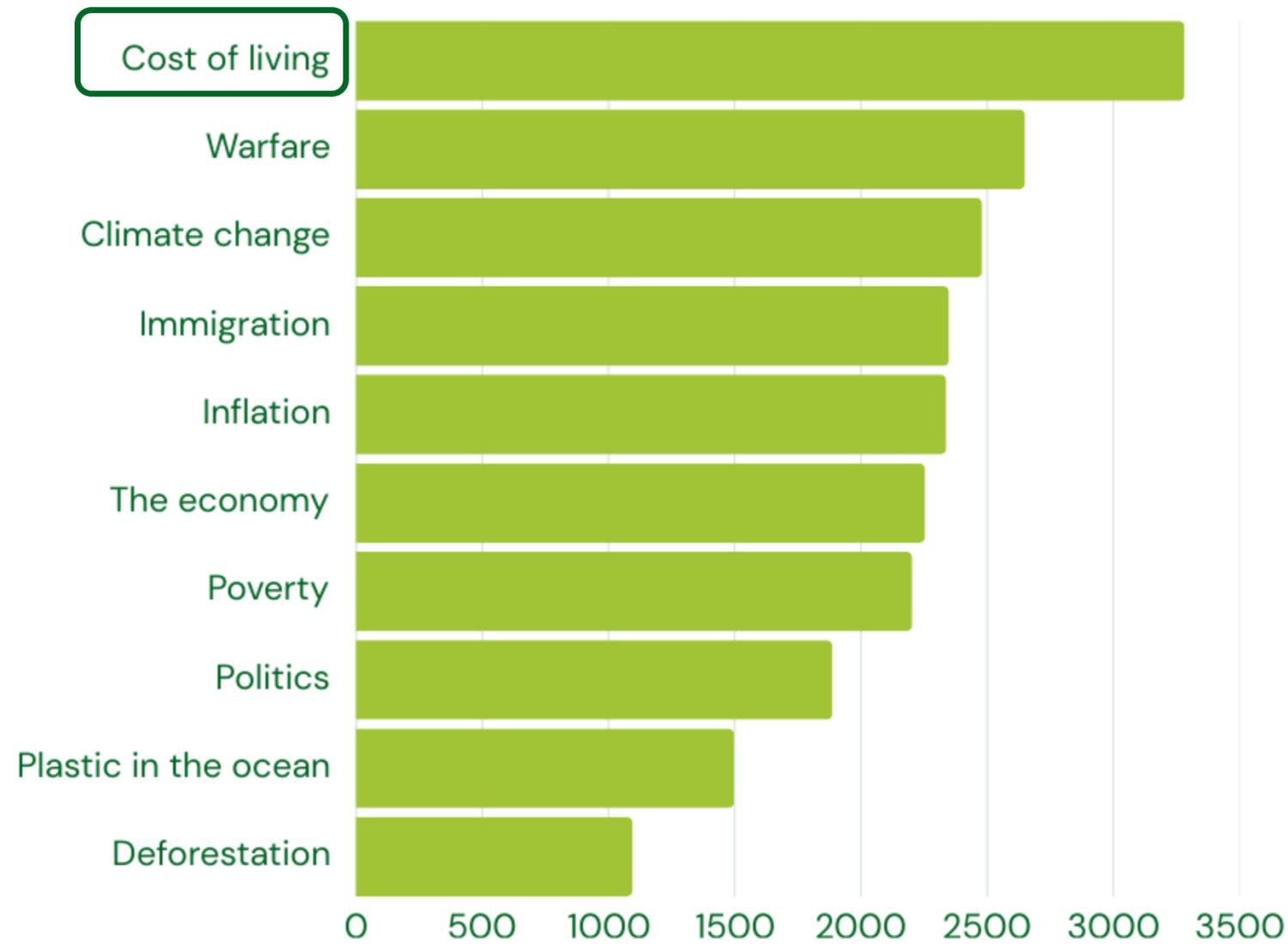
- 5,000 adults
- Five European countries



The research is designed to gauge European consumers' views on different packaging and environmental issues.



What are the biggest issues facing us today?



Impact of multiple pain points, climate change remains Top 3



Concern about climate change is higher among Boomers than Gen Z



Shrinkflation reached consumer's attention



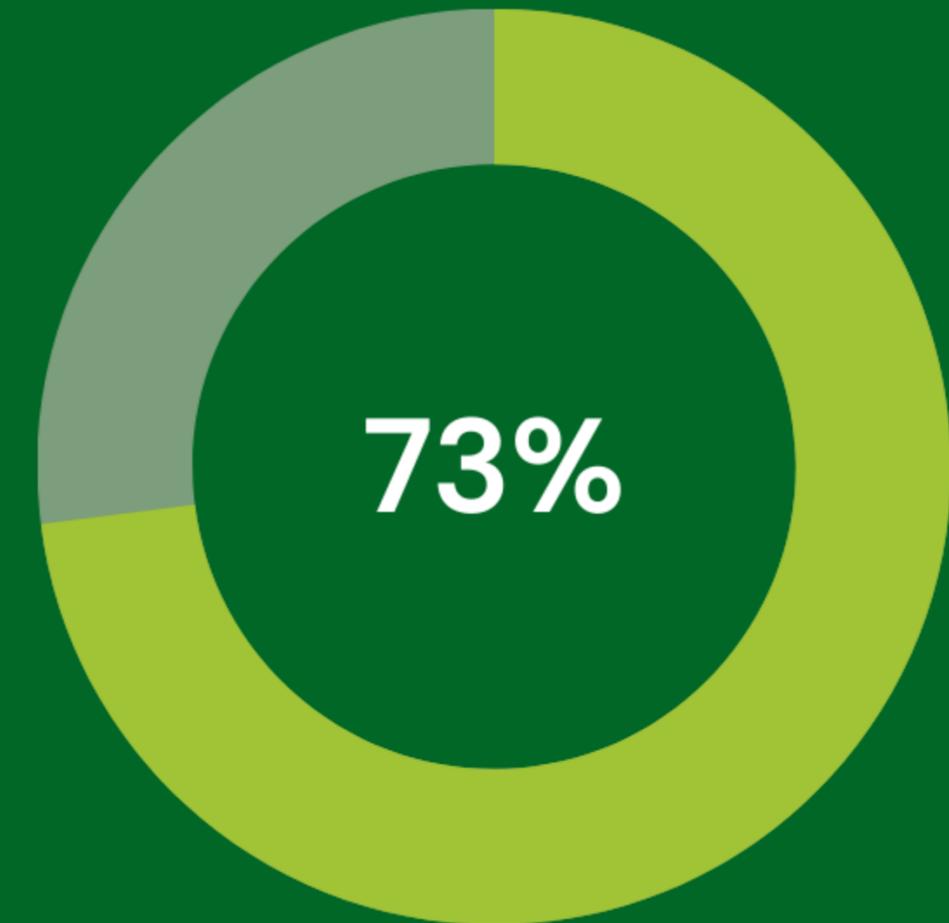
Nearly three-quarters of shoppers are now actively concerned about shrinkflation.



A significant 39% stating they are "very concerned" about products getting smaller while prices remain the same

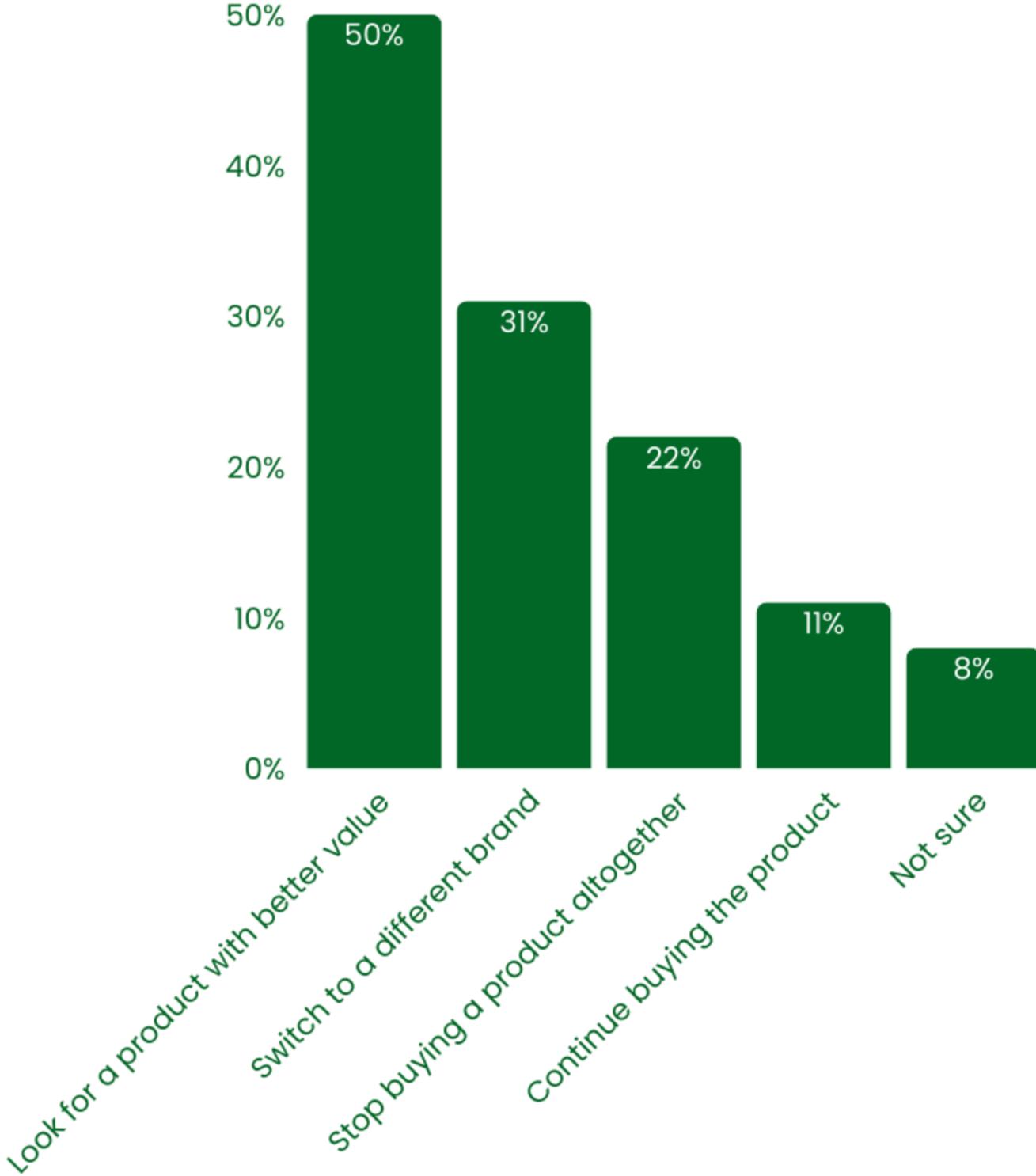
What is shrinkflation?

When the quantity or size of a product is reduced but the price stays the same.

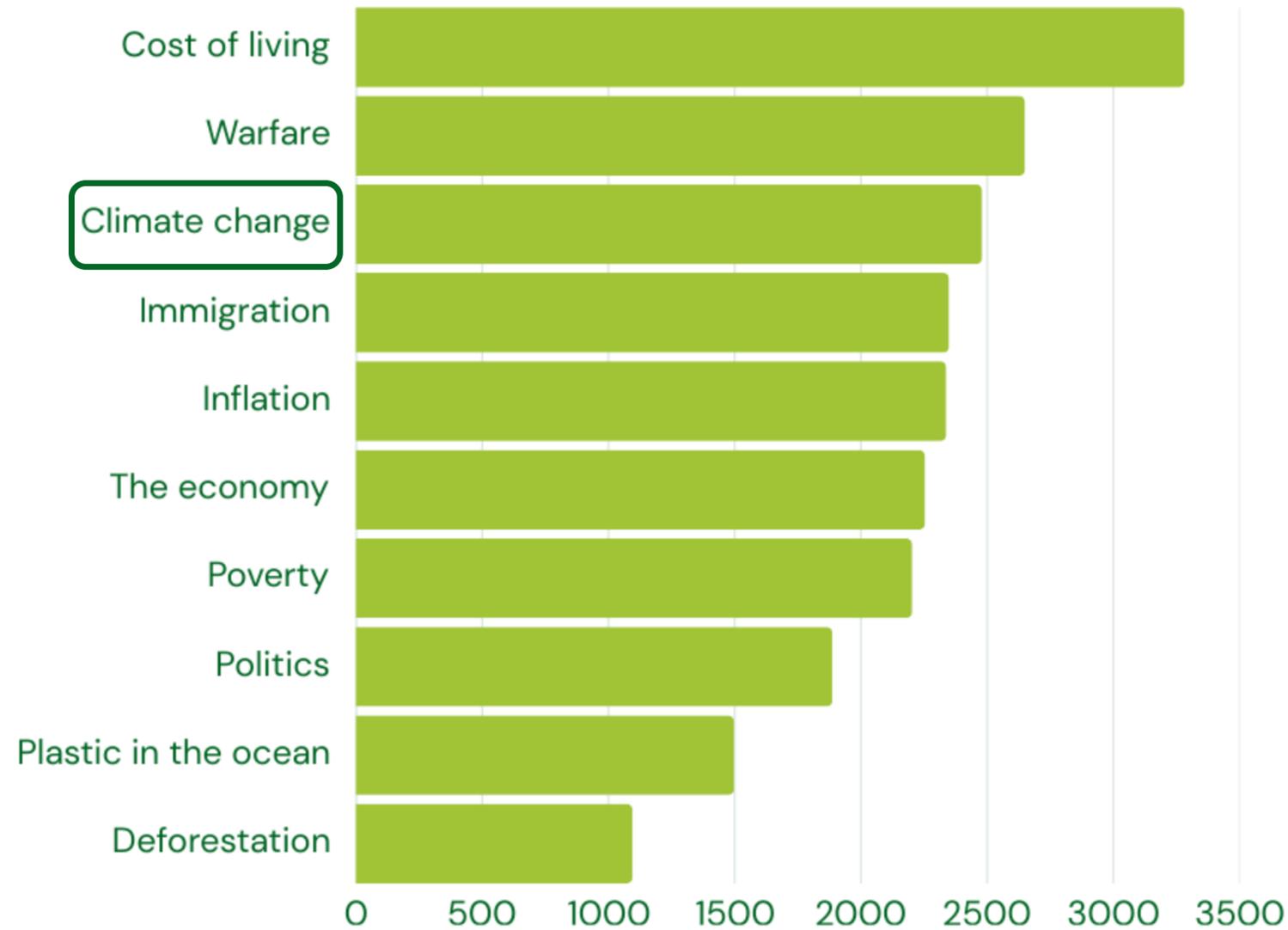


Shrinkflation damages consumer loyalty

80% of consumers will sanction the brand when they recognise shrinkflation.



What are the biggest issues facing us today?



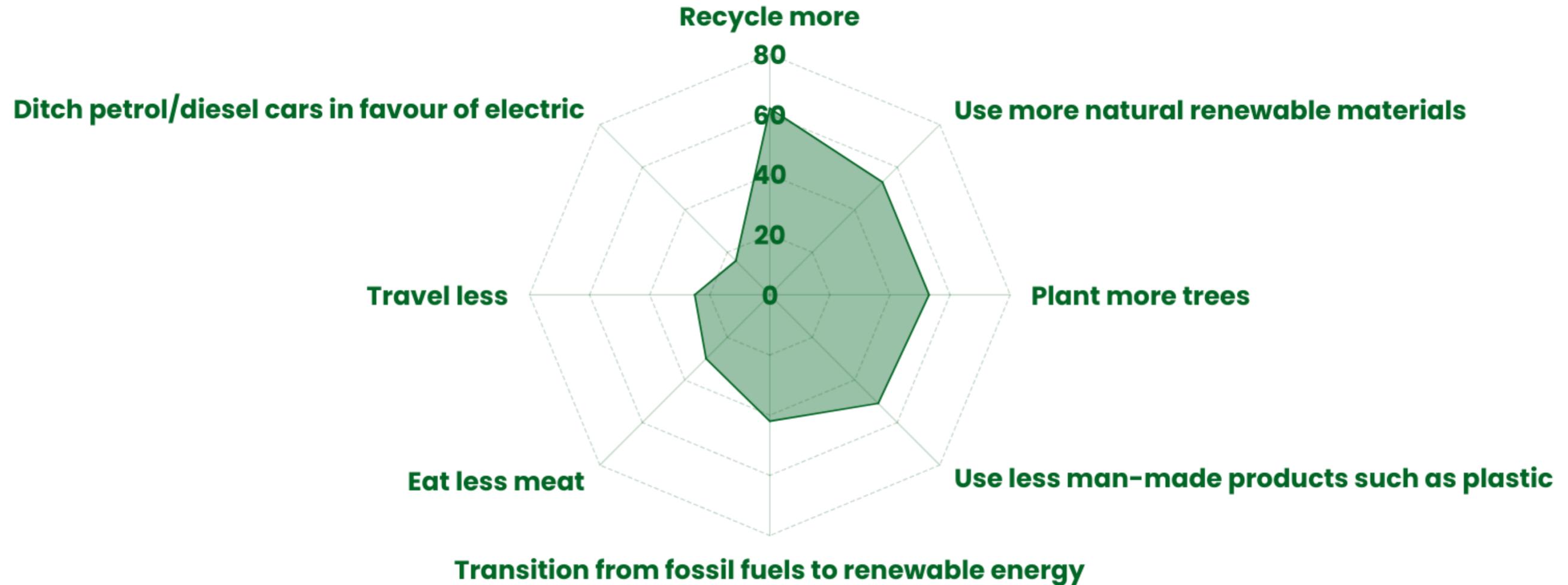
Impact of multiple pain points, climate change remains Top 3



Concern about climate change is higher among Boomers than Gen Z



Recycling, renewable materials and trees lead public thinking on climate action



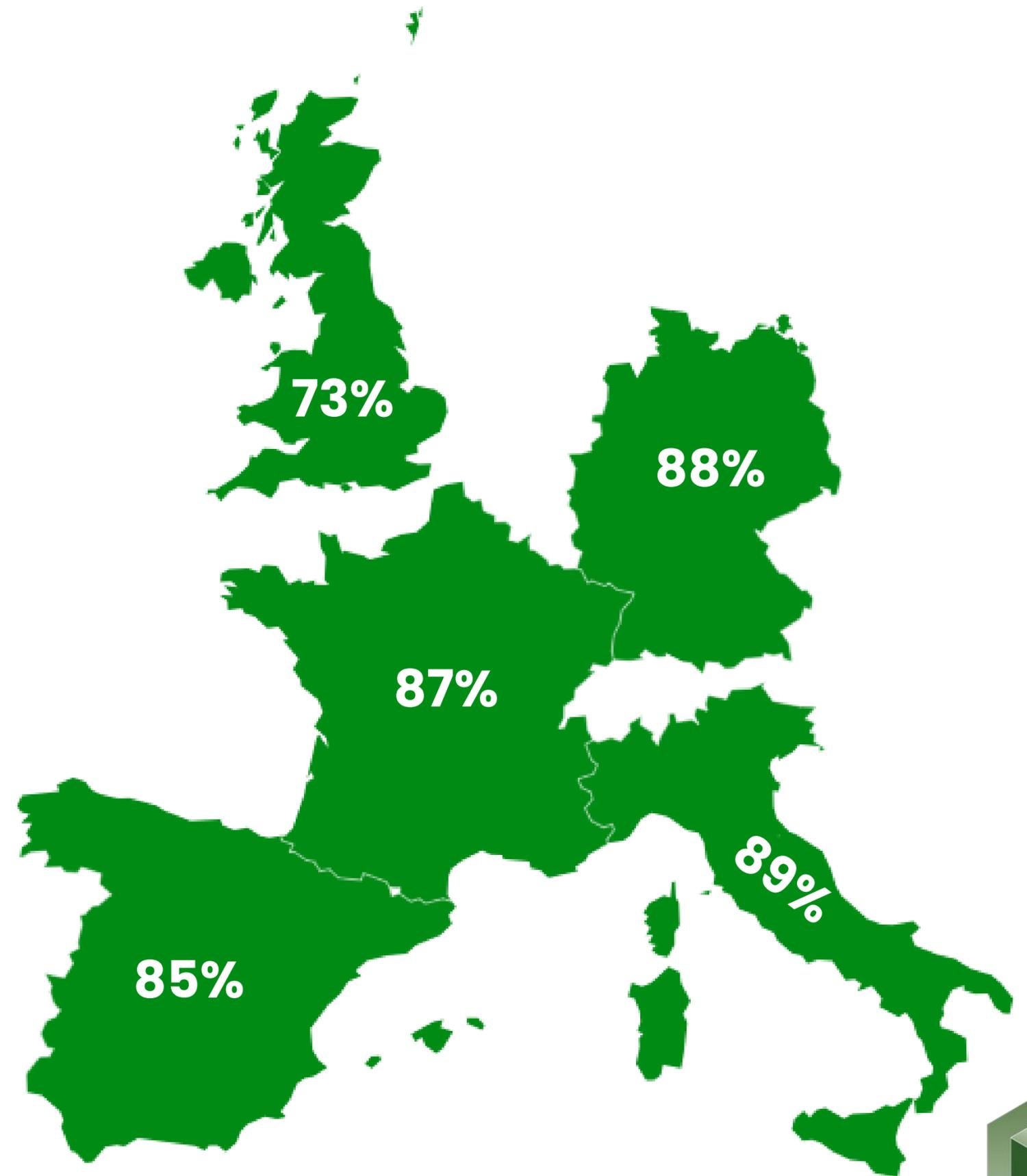
Nearly two in three consumers say easy to recycle packaging is most important

Ease of recycling is the top priority for 64% of consumers – climbing to 72% for those aged 60+ – ranking this material concern well ahead of packaging made from renewable sources (40%) and functional features like resealability (39%) or ease of opening (35%).

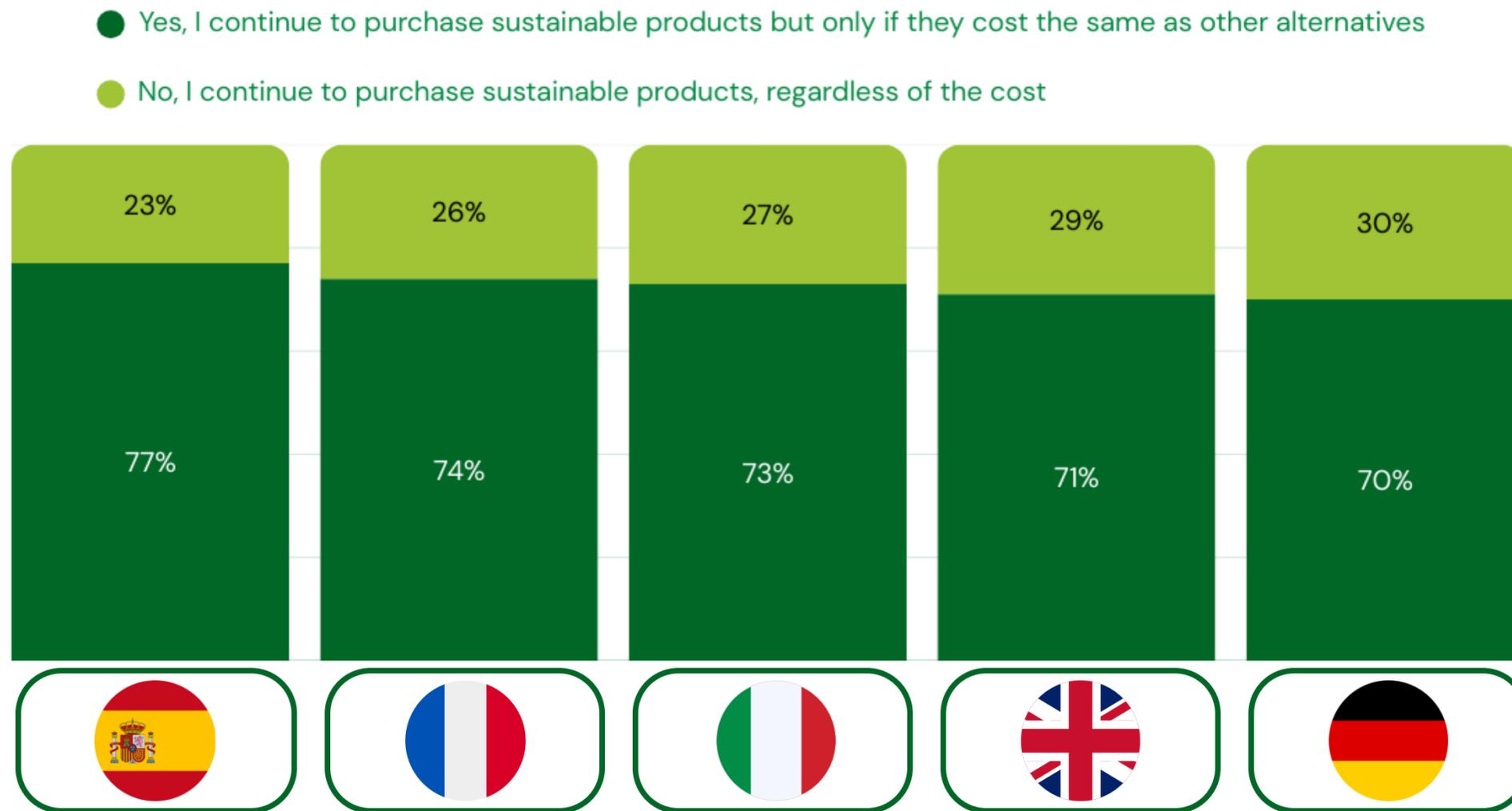


84% prefer cartonboard over plastic packaging

Preference for cartonboard is strongest in **Italy, Germany, and France**. It also increases with age, peaking at 92% for boomers.



The cost-of-living squeeze is **changing** how Europeans buy sustainable products



73% 

Now only buy sustainable products if prices match alternatives — up from 64% last year.

27%

More than a quarter remain committed to sustainability regardless of price



37% of consumers have switched brands due to packaging concerns



54%



Over half of **18–29s** have switched products because of packaging

44%

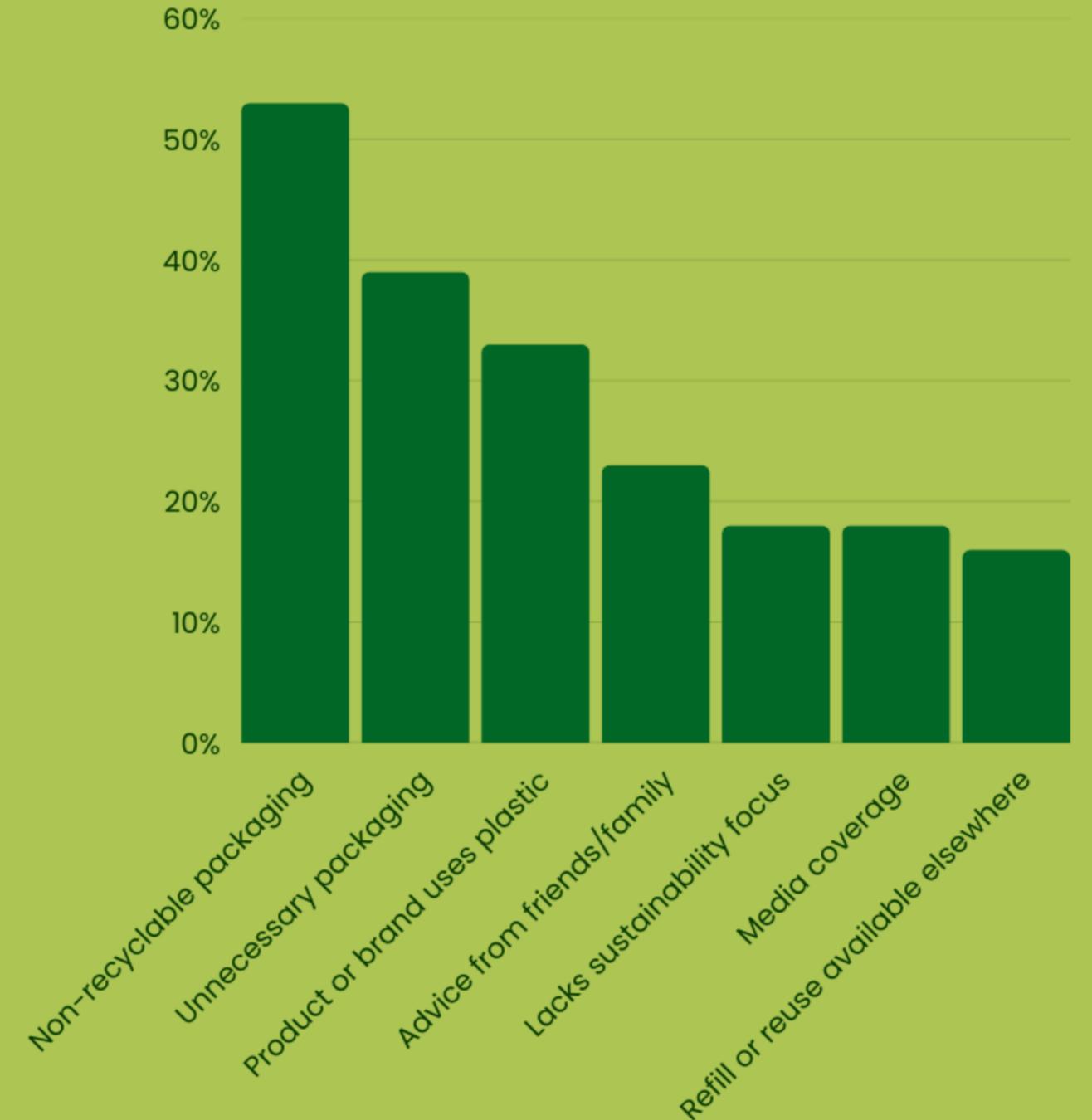


Spain leads Europe on packaging-driven switching



When consumers switch it's because packaging is unrecyclable, excessive, or plastic-heavy.

- 53% switched because the packaging was non-recyclable
- Nearly one in three 18–29s switch brands because of media or friends' advice
- Italy (43%) and Spain (42%) see more switching due to excess packaging



Recyclability becomes important differentiator



Well-informed consumer base

84% of consumers say they are confident about which materials can be recycled. Unchanged from 2025.



Confidence is consistent across ages

Confidence peaks among 30–44s (86%), with consistently high levels across Gen Z (84%), Gen X (83%) and Baby Boomers (84%).



Confidence on what materials can be recycled



88%



87%



86%



84%



76%

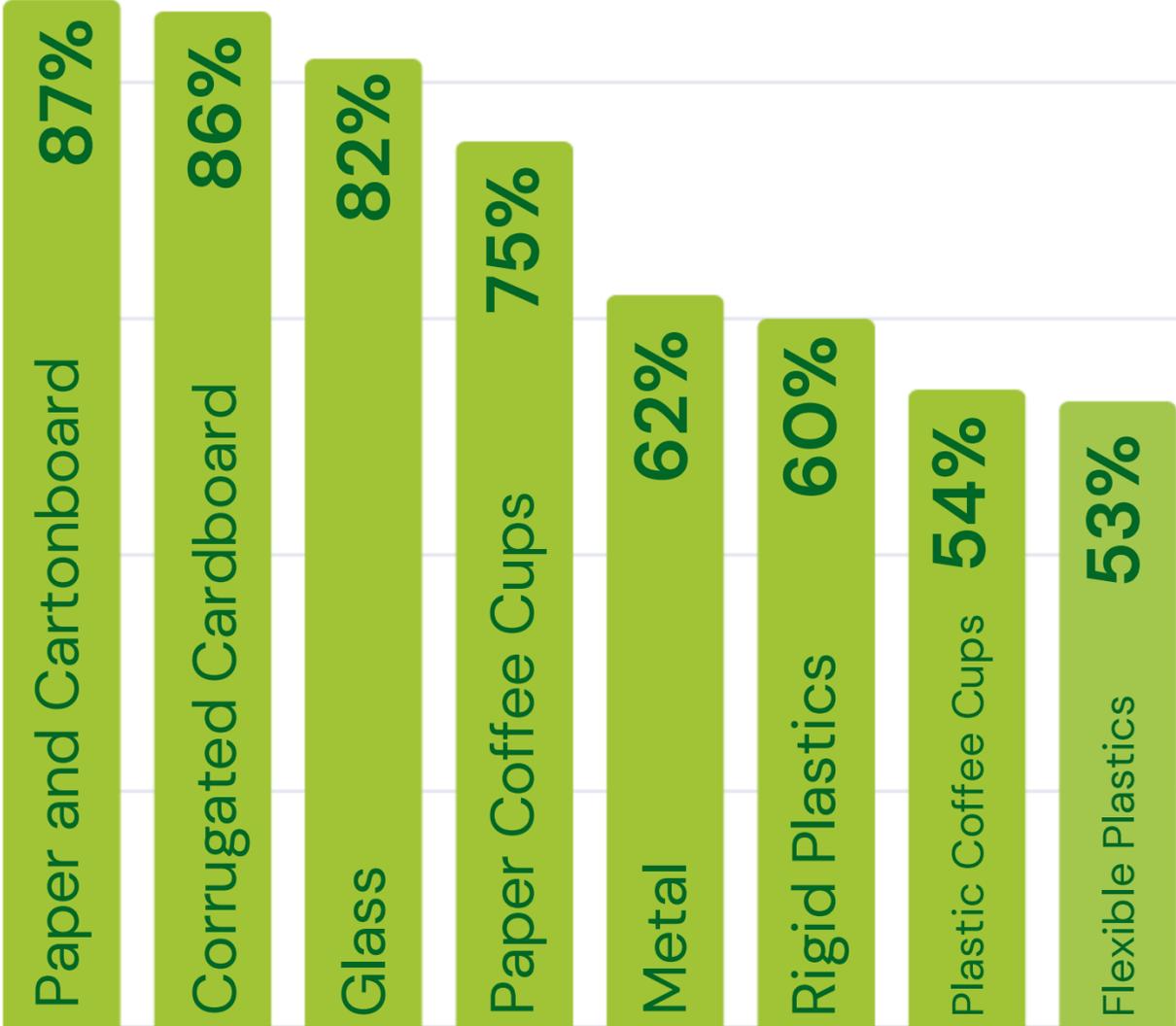


Consumers **trust** paper and cartonboard most for recycling. Plastics remain a source of uncertainty.

How confident are you that the following materials will be **recycled**?

87%

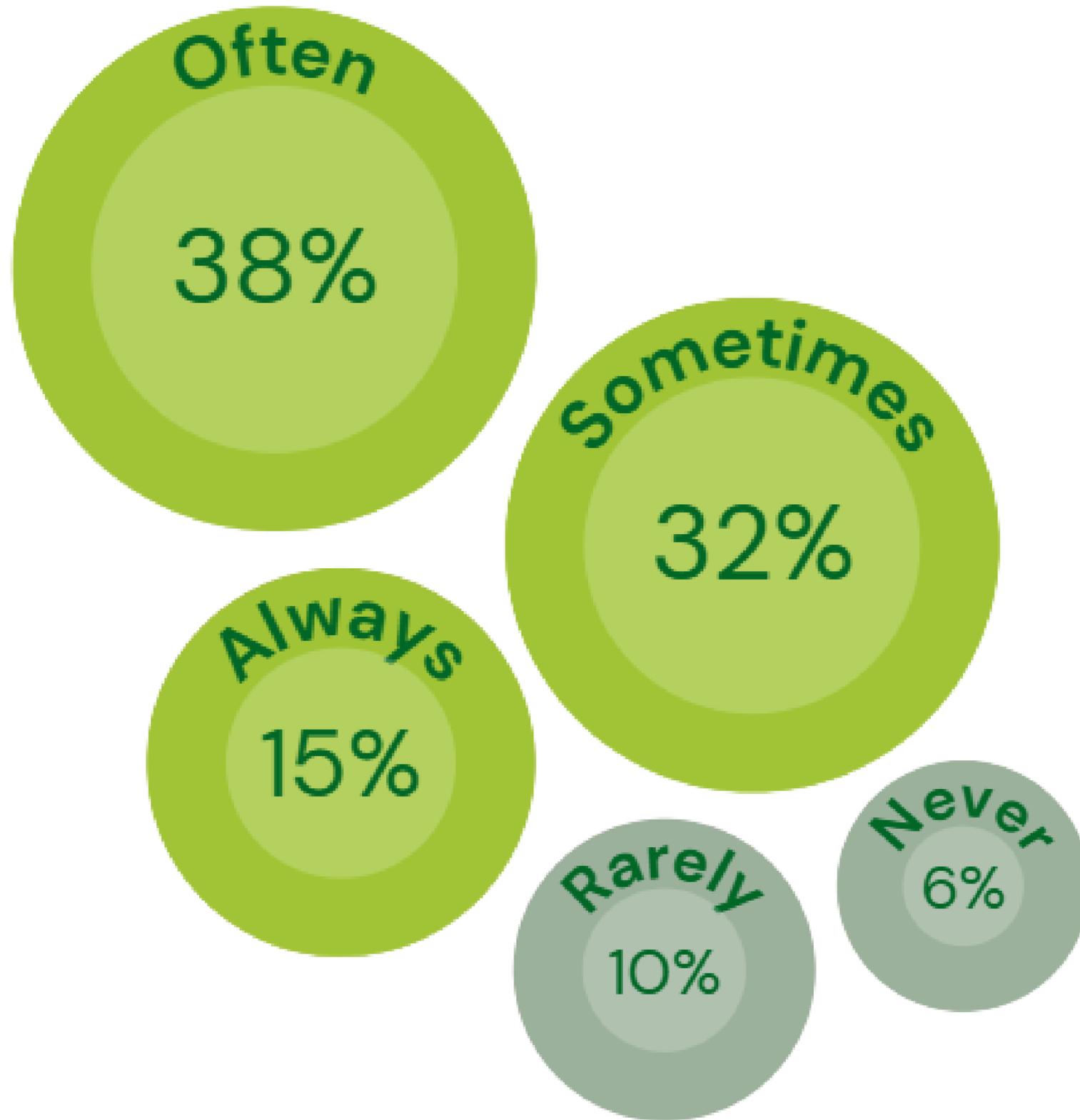
Confidence in paper and cartonboard has the highest trust levels for the first-time.



53%

Flexible plastics and plastic coffee cups lowest trust level in recycling.





Climate impact drives purchasing decisions

85% of consumers stating they consider the impact of the purchasing decision on climate at least “sometimes” when purchasing packaged goods.

62% of 18-29 year olds have the “end of life” always or often in mind at the point-of-sale.



Sustainable packaging boosts brand loyalty for consumers

66%

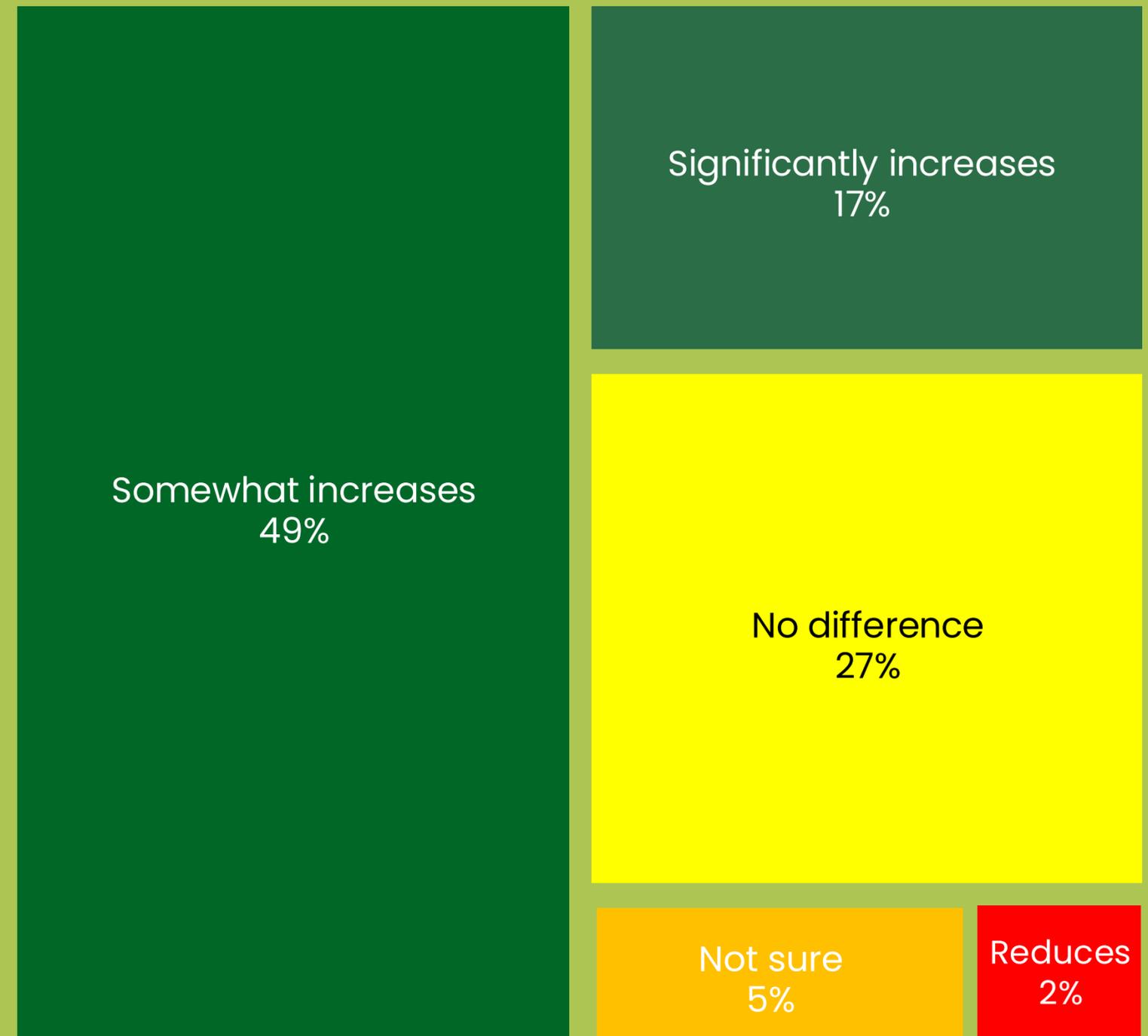
report that sustainable packaging increases their trust in a product, with nearly one in five stating the impact is "significant".



Impact is highest in Italy, where 77% of consumers feel more positive toward brands using eco-friendly materials.



Over one third of German consumers state that sustainable packaging makes "no difference" to their trust in a brand, making them the most indifferent.





Folding Cartons
CO2 Footprint Report 2025



Methodology & Data

Integrity

Calculation Scope

Cradle-to-Gate fossil carbon footprint for European cartonboard production and converting processes.

Expert Oversight

Data Collection & Analysis: Conducted by RISE (Research Institutes of Sweden). Independent Verification: Verified by ifeu, Germany.

High Industry Representation

60% of European Cartonboard Production
16% of European Folding Carton Production



Investments Deliver Results

- 💡 Total Fossil Carbon Footprint: 854 kgCO₂e
- 💡 This represents an 8% reduction compared to the previous 2021 calculation.

What drove this decrease?

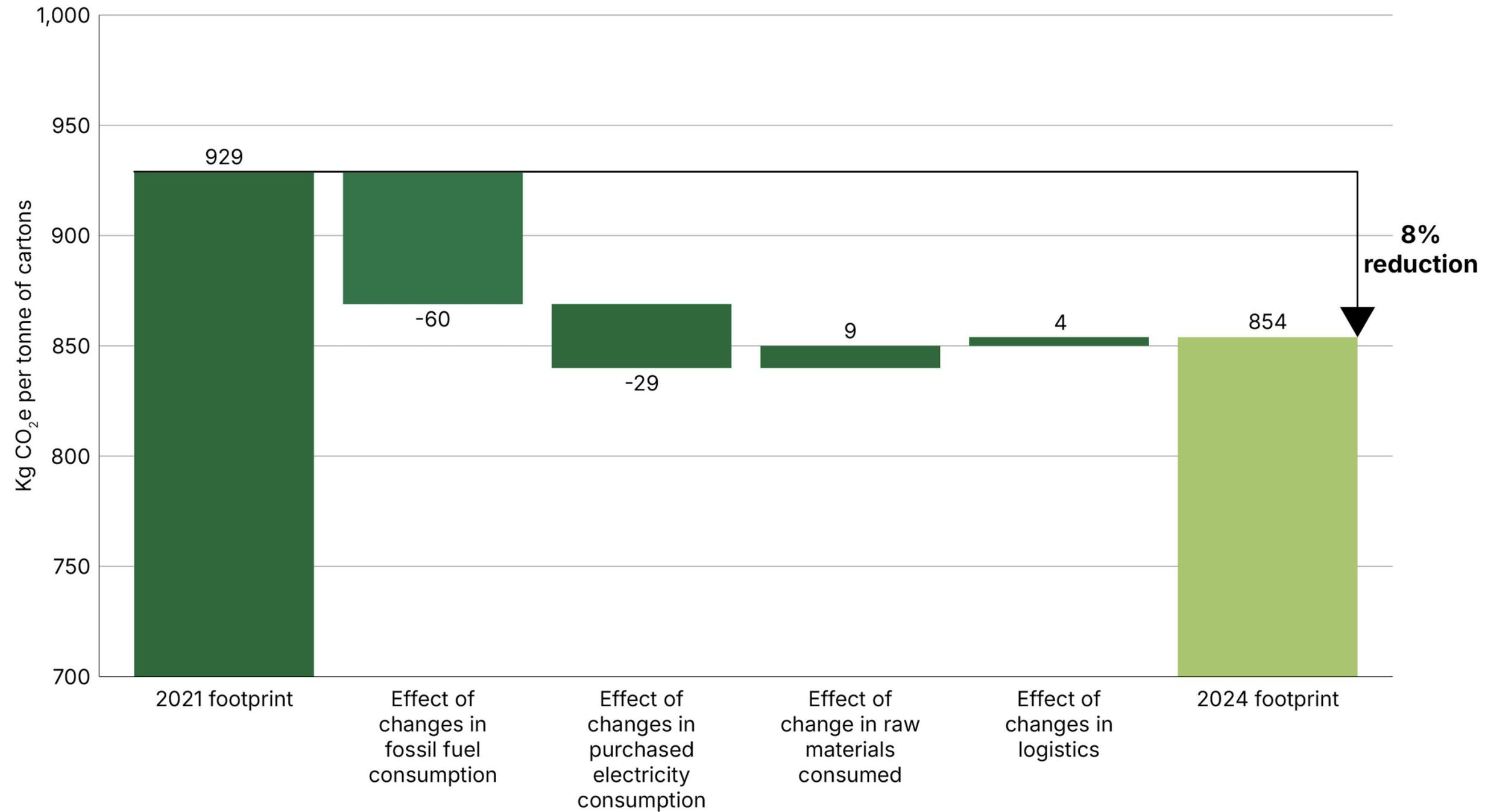
Renewable energy investment
Decarbonising electricity
Zero deforestation impact

929 kgCO₂e

- 8%

854 kgCO₂e

Renewable Energy and Green Power





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