

EXECUTIVE SUMMARY

2020 GLOBAL BUYING GREEN REPORT

Momentum builds for
sustainable packaging.

TRIVIUM
PACKAGING



Consumers are making their voices heard.

Sustainability is at the forefront of consumers' and regulators' minds, and the challenge for consumer brands has become clear:

It's no longer a question of if brands should shift to more sustainable packaging, but how.

67%

of consumers now identify as environmentally aware.

A global perspective on sustainable packaging.

In a follow-up to our groundbreaking 2019 Buying Green report, which documented U.S. consumers' willingness to pay more for products in sustainable packaging, we've expanded the study. Again conducted by the Boston Consulting Group, this new Buying Green report documents the responses of 15,620 consumers across the U.S., Europe and South America.

Within each region, survey respondents represent the population in age, gender and income distribution. In Europe, the survey covered the five largest markets. In South America, it was focused on Brazil and Argentina. In all regions, it covered packaging for products for the food, beverage, personal care and beauty, and home care and industrial markets.

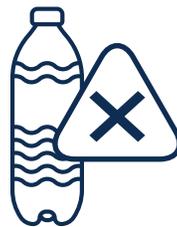


Sustainability goes mainstream.

Delivering on the sustainable packaging mandate isn't a matter of appeasing a small subset of consumers.

Environmentally friendly, recyclable packaging is important to more than two of three consumers.

But does that "importance" translate to purchasing? For the majority, it does.



53%

are actively looking for recycling or sustainability information on packaging.

59%

say they are less likely to buy a product in harmful packaging.

47%

of consumers won't buy products in packaging that is harmful to the environment.

Brands that move to sustainable and recyclable packaging and include recycling information on their packaging address the needs of the majority of consumers seeking that information plus gain access to a large group of consumers who aren't even considering their products today.

Materials matter.

Plastic has become pervasive in packaging, but it has a serious image problem with consumers.

57%

of consumers associate plastic with “harmful” – **80% more** than metal.

ONLY

5%

of consumers associate plastic with the word “premium,” and one in four associate it with “low quality.”

For brands striving for a premium or eco-friendly position, plastic packaging works against the desired brand image.

Issues with plastic extend beyond its low-quality image and limited recyclability. Plastic pollution, particularly in oceans, has been the focus of extensive media coverage, and consumers are paying attention.

65%

of consumers associate plastic with ocean pollution.

Based on consumer preferences and perceptions identified in this research, consumers are seeking out eco-friendly packaging and avoiding packaging they consider harmful.



Putting a price on sustainability.

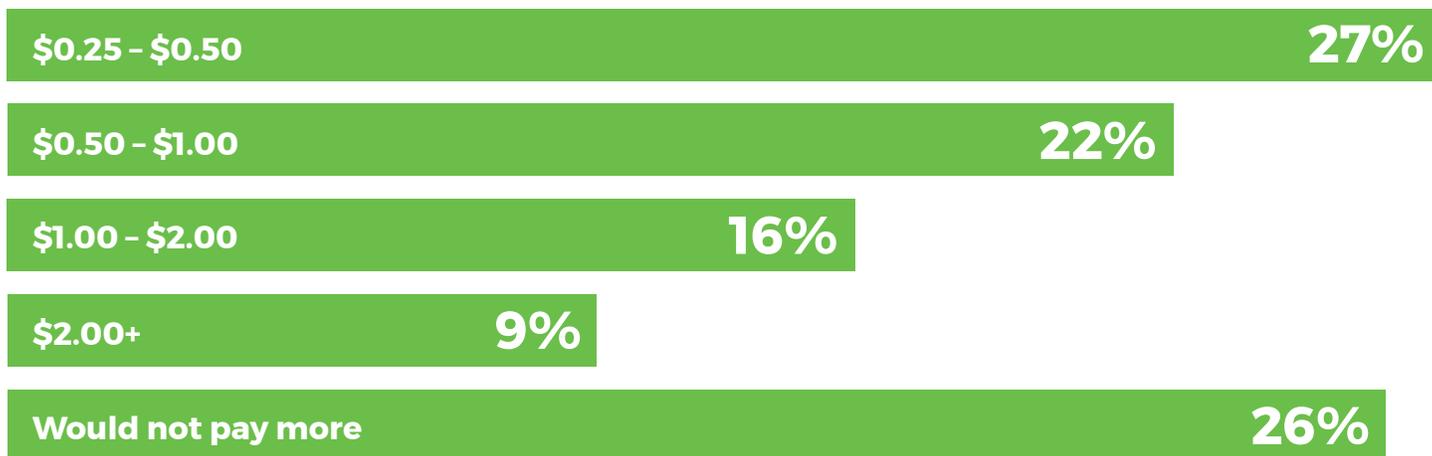
The true test of consumers' commitment to sustainability comes when they are asked whether they would be willing to spend more for eco-friendly packaging. Here, the survey results are encouraging for brands considering the move to sustainable packaging. Across the food, beverage, personal care and beauty, and home care and industrial product categories:



74%

of consumers said they would pay more for sustainable packaging, and **25%** are willing to pay an additional **10% or more**.

Willingness to pay was consistent across all income categories, but how much more consumers are willing to pay correlates positively with income.



Based on a \$10.00 product.

Sustainability is a global concern.

UNITED STATES

49%

are less likely to buy products in packaging harmful to the environment.

46%

associate plastic with “harmful.”

EUROPE

74%

consider eco-friendly packaging important.

6%

view plastic as eco-friendly.

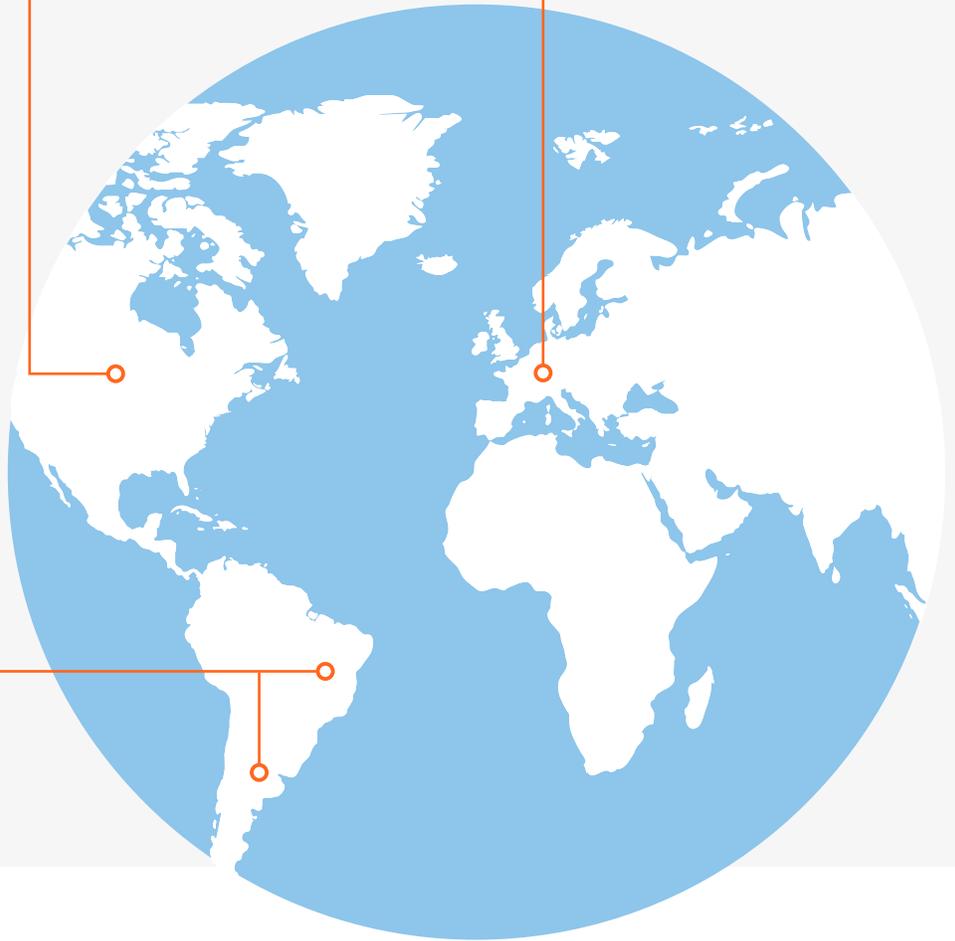
SOUTH AMERICA

83%

are willing to pay more for eco-friendly packaging.

73%

associate plastic with ocean pollution.



Sustainability drives sales.

The NYU Stern School of Business found that sustainability-marketed products grew

5.6x

faster than conventionally marketed products.

AND, IN OVER

90%



of individual product categories, sustainability-marketed products outpaced the growth of their categories.

Consumers around the world are demanding sustainable packaging. Brands that respond effectively with sustainable and recyclable packaging can grow, share and enhance their image.

Want to see results for a specific region? Visit TriviumPackaging.com/sustainability to download the U.S., Europe or South America Buying Green 2020 Report.





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