The message is clear: sustainable packaging matters
Buying Green Report

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Introduction

At Trivium Packaging (‘Trivium’), we aim to shape the future of packaging to ensure a better planet for everyone – now and for future generations. Our packaging solutions are made of a material that is infinitely recyclable: metal.

Metal can be used, and recycled again and again, matter to us, so we wanted to know what matters to consumers when they consider and choose sustainable packaging.

We therefore partnered with Euromonitor International to find out what consumers think, value, and perceive when it comes to sustainable packaging, by conducting a survey in Europe, North America, and South America.

The result of that survey is our fourth Buying Green Report. This survey also builds on previously shared data, showing the continued evolution of consumers’ attitudes and behaviors related to sustainable packaging while also sharing new insights and opportunities within sustainable packaging.

Survey methodology

The 2023 Buying Green Report is based on a survey of more than 9,000 consumers across Europe, North America, and South America. Within each region, the sample of respondents was representative of the overall population in terms of age, gender, and income distribution.

The survey questions explored three main areas: consumers’ general attitude to sustainability, perceptions of sustainable packaging*, and behaviors regarding sustainable packaging, including their willingness to pay more for it.

The data collected through Buying Green surveys over the last four years provides insights into consumer trends related to packaging sustainability in a changing world.

* The term sustainable packaging was not defined as part of the survey and so was left to individual respondent’s own interpretation.
Throughout 2022, people around the world have been challenged by various global stressors, including the lingering effects of the pandemic, inflation, and political instability. In addition, conditions are worsening in terms of climate change and the overall environment, which is increasingly impacted by overpopulation and multiplying severe weather events.

Faced with these challenges, the majority of consumers in all surveyed regions continue to step up and prioritize sustainability in their general activities and purchasing decisions to ensure a better planet for everyone.

### Changing habits

**Sustainable activities become habits for a high proportion of consumers.**

- **66%** consider themselves to be environmentally aware.
- **71%** engage in sustainable activities such as buying local and refilling bottles and containers.
- **58%** participate in reducing food and packaging waste.
In addition to reusing and recycling, another way for consumers to live more sustainably is purchasing products in sustainable packaging. In comparison to last year's report we are seeing an increase in consumers choosing packaging based on its sustainability credentials, and fewer are likely to buy products they consider environmentally harmful.

**Increasing consumer attention**

- **71%** have chosen a product in the last six months based on its sustainability credentials.
- **79%** are looking for products in sustainable packaging.
- **63%** claim they are less likely to buy products with packaging that is harmful to the environment.

**Advice for brands:** 79% of consumers are looking for products in sustainable packaging.
Increasing consumer attention

This is particularly true among younger generations and people with a higher than average income. Both Gen Z and Millennials show a strong preference for sustainable packaging, with an impressive 76-77% of survey respondents in these generations choosing to buy products in sustainable packaging, 7% more than the average.

Comparison of buying choices by age and income level

All respondents showed an interest in sustainable packaging, however younger and higher income earners are more likely to purchase products in sustainable packaging.
Increasing product variety

As the positive perceptions around sustainable packaging grow and behaviors mature, consumers continue to express high interest in purchasing products in sustainable packaging.

Despite this growing interest, a gap exists, with more than half of consumers surveyed saying that most of the products they currently buy do not have sustainable packaging.

Sustainable packaging needed for greater variety of products.

Looking across product categories, food and beverage products seem to have more sustainable packaging options today compared to other categories. Food and beverage are the categories best positioned in terms of likelihood of consumers purchasing more sustainably packaged products in the future.

NEW FINDING

% of consumers who perceive their current purchases across categories to be in sustainable packaging versus likelihood of purchasing more products in sustainable packaging in the future

- Beverage products: 40% current, 82% future
- Food products: 30% current, 81% future
- Personal care products: 25% current, 78% future
- Homecare / industrial products: 23% current, 75% future

Percentage of products currently bought in sustainable packaging

Likelihood to purchase more products in sustainable packaging in the future
Our survey highlighted differences in the commitment to sustainability – and engagement with sustainability practices – in different regions.

- Europeans lead in most of the sustainable practices described in the survey, while also prioritizing products in sustainable packaging.
- In North and South America, while respondents still feel strongly about sustainability, we see slightly lower engagement.

**NEW FINDING**

% of consumers engaging in sustainable activities by region

<table>
<thead>
<tr>
<th>Activity</th>
<th>Europe</th>
<th>South America</th>
<th>North America</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reusable activities</td>
<td>77%</td>
<td>68%</td>
<td>66%</td>
</tr>
<tr>
<td>Reducing food / packaging waste</td>
<td>66%</td>
<td>57%</td>
<td>51%</td>
</tr>
<tr>
<td>Controlling / managing energy use</td>
<td>63%</td>
<td>58%</td>
<td>43%</td>
</tr>
<tr>
<td>Buying local</td>
<td>58%</td>
<td>50%</td>
<td>53%</td>
</tr>
<tr>
<td>Activities to protect / preserve nature</td>
<td>58%</td>
<td>48%</td>
<td>40%</td>
</tr>
<tr>
<td>Buying second-hand</td>
<td>42%</td>
<td>30%</td>
<td>43%</td>
</tr>
</tbody>
</table>
Regional highlights

Europe

Consumers in this region are most actively participating in a wide variety of sustainable practices compared to North and South America. This is most notably seen in the reuse of packaging (77%) and in reducing food and packaging waste (66%).

58% look for information on the recyclability or sustainability of the packaging on the products they buy.

South America

Consumers in South America primarily engage in activities that protect and/or preserve nature (48%) such as water conservation, planting trees, gardening, and eliminating pollution – a rate that is higher than (41%) in Europe (71%) and North America (52%).

41% say the places where they typically shop do not sell sustainable products, compared to 22% in Europe and 24% in North America. This prevents consumers from adopting additional sustainable behaviors, like purchasing more products with sustainable features.

North America

60% consider it important to buy products in recyclable or environmentally friendly packaging and see themselves as environmentally aware consumers. However, consumers in North America tend to be unsure about which sustainable features to look for in products (28%).

When asked about words they associate with plastic packaging, most consumers surveyed in North America associated the material with being both recyclable and harmful for the environment. This seems to indicate that consumers would benefit from more information around sustainable products and features.
Misleading claims around recyclability

Some misleading claims concerning the recyclability of types of packaging have led to misconceptions among consumers.

As a result, consumers may mistakenly believe that certain types of packaging are often recycled when they are not, and the other way around. For instance, in the United States, the Environmental Protection Agency (EPA) reports a recycling rate of 13.6% for plastic containers and packaging, while, on average, 45% of consumers believe their plastic is recycled.

Likewise, respondents perceive 45% of liquid cartons are recycled, despite a reported rate of 27%. And, while glass is most perceived as being recycled, the actual rates are lower than consumer perceptions.

In contrast to these figures, when looking at metal packaging specifically, recycling rates for aluminum (71%) and steel (66.8%) are much higher than consumers think (on average globally, 45% of respondents perceive metal is recycled). This highlights a clear need for further consumer education and truthful claims.

![Recycling Rates based on consumer perception vs reality](https://via.placeholder.com/150)

<table>
<thead>
<tr>
<th>Material</th>
<th>Perceived recycling rate</th>
<th>Actual recycling rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metal</td>
<td>45%</td>
<td>69%</td>
</tr>
<tr>
<td>Glass</td>
<td>54%</td>
<td>32%</td>
</tr>
<tr>
<td>Liquid carton</td>
<td>45%</td>
<td>27%</td>
</tr>
<tr>
<td>Plastic</td>
<td>45%</td>
<td>14%</td>
</tr>
</tbody>
</table>

Sources:
- Metal global recycling rate: [Global Recycling & International Aluminium Institute](https://www.alu-international.org)
- Glass global recycling rate: [Recovery. Recycling Technology Worldwide](https://www.recyclingtechnologyworldwide.com)
- Liquid carton recycling rate: [Tetra Pak Sustainability Report](https://www.tetrapak.com)
- Plastic global recycling rate: [World Economic Forum](https://www.weforum.org)
The benefits of metal packaging

We found that the true benefits of metal packaging match consumer perceptions.

In the surveyed regions see metal as having great potential as a sustainable packaging material, most consumers associated the material with being both recyclable and durable.

These positive associations around recyclability and durability consumers, increasing its use as a sustainable packaging solution could be easy and effective.

### Recyclability

**Consumer perceptions of metal packaging**

52%

![Recyclability](image)

**Actual sustainable benefits**

- Recyclable
- Durable

### Durability

**Consumer perceptions of metal packaging**

47%

![Durability](image)

**Actual sustainable benefits**

- Recyclable
- Durable
We found that sustainability persists through tough economic times.

Consumers around the world have been hit hard by inflation, which has severely impacted how they spend and save across all categories. Exponentially rising prices often lead to difficult decisions, such as trading up and trading down for specific products.

From the start of 2023, consumer prices are expected to stabilize across all the regions surveyed, increasing consumers' spending capacity, and reducing the influence of value or price on the products they choose.

Source: Index of Consumer Prices: Euromonitor International from national statistics/Eurostat/UN/OECD 2020-2024
While higher prices affected consumer spending to some degree, 70% of consumers chose not to swap sustainably packed products for alternatives. As sustainable habits have become a normal part of many consumers' lives and dictate their product choices, they continue to favour these types of goods and services, even during economic struggles.

**NEW FINDING**

**71%**

South America

**73%**

Europe

**65%**

North America
Consumers are still willing to pay more

% of consumers are willing to pay more for sustainable packaging, by age*

<table>
<thead>
<tr>
<th>Age</th>
<th>Up to 10% more</th>
<th>Over 10% more</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-34</td>
<td>52%</td>
<td>38%</td>
</tr>
<tr>
<td>35-54</td>
<td>53%</td>
<td>30%</td>
</tr>
<tr>
<td>55+</td>
<td>56%</td>
<td>17%</td>
</tr>
</tbody>
</table>

% of consumers are willing to pay more for sustainable packaging, by income*

<table>
<thead>
<tr>
<th>Income</th>
<th>Up to 10% more</th>
<th>Over 10% more</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low</td>
<td>58%</td>
<td>24%</td>
</tr>
<tr>
<td>Medium</td>
<td>50%</td>
<td>33%</td>
</tr>
<tr>
<td>High</td>
<td>54%</td>
<td>38%</td>
</tr>
</tbody>
</table>

Willing to pay
- up to 10% more
- over 10% more

82% of consumers are willing to pay more for sustainable packaging, by age.

29% of consumers are willing to pay more for sustainable packaging, by income.
04 Making sustainability more intuitive

Clear information

We found that consumers need to understand sustainable claims.

- 59% of consumers look for information on the recyclability or sustainability of the packaging on products they buy.
- 26% of consumers are unsure what sustainable features to look for when considering a product for purchase.
- 46% of consumers said unclear labeling is a barrier they face when thinking about purchasing products with sustainable features.

NEW FINDING

About purchasing products with sustainable features.
Although they can be confused by unclear labeling at times, most consumers still have a strong trust in all sustainable claims. This demonstrates their possible willingness to purchase more sustainable products over non-sustainable options, even if they don’t fully understand how the product benefits the environment.

Consumers value certain sustainable packaging claims more than others, which can influence their purchases. They tend to choose products that have actionable, simple, and relatable claims such as “refillable” or “recyclable”. These types of claims help consumers feel a sense of fulfillment and contribution to the greater good, compared with more nuanced, scientific claims such as “made with sustainable materials” or “products with lower CO₂ emissions”.

### Sustainable claims and outcomes

Consumers value certain sustainable packaging claims more than others, which can influence their purchases. They tend to choose products that have actionable, simple, and relatable claims such as “refillable” or “recyclable”. These types of claims help consumers feel a sense of fulfillment and contribution to the greater good, compared with more nuanced, scientific claims such as “made with sustainable materials” or “products with lower CO₂ emissions”.

### NEW FINDING

% of consumers very likely or likely to purchase a product based on sustainable packaging claims

<table>
<thead>
<tr>
<th>Claim</th>
<th>North America</th>
<th>South America</th>
<th>Europe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refillable / reusable</td>
<td>77%</td>
<td>86%</td>
<td>83%</td>
</tr>
<tr>
<td>Recyclable</td>
<td>77%</td>
<td>83%</td>
<td>82%</td>
</tr>
<tr>
<td>Made with recycled content</td>
<td>77%</td>
<td>78%</td>
<td>78%</td>
</tr>
<tr>
<td>Compostable / biodegradable</td>
<td>77%</td>
<td>77%</td>
<td>77%</td>
</tr>
<tr>
<td>Made with sustainable materials</td>
<td>77%</td>
<td>77%</td>
<td></td>
</tr>
<tr>
<td>Produce with lower CO₂ emissions</td>
<td>65%</td>
<td>86%</td>
<td></td>
</tr>
</tbody>
</table>
Reflective of this, consumers across all regions prioritize products that list "recyclable" as a claim over those labeled with "made with recycled content". When it comes to recyclability, some packaging materials can make even stronger claims, such as being "infinitely recyclable".

Metal can be recycled again and again without degradation. Metal can be recycled again and again without degradation. *80% of all metal ever produced* is still in use today.

<table>
<thead>
<tr>
<th>Region</th>
<th>Recyclable</th>
<th>Made with recycled content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>83%</td>
<td>77%</td>
</tr>
<tr>
<td>South America</td>
<td>88%</td>
<td>84%</td>
</tr>
<tr>
<td>North America</td>
<td>77%</td>
<td>72%</td>
</tr>
</tbody>
</table>

*Source: www.metalrecyclesforever.eu*
Governing bodies step up to improve consumers’ understanding of sustainability claims

In March 2023, the European Commission proposed a new “Directive on Green Claims”, aimed at making sustainable claims more reliable, through science-backed verification. By default, the proposed new law will allow consumers to make more informed decisions on their purchases. It will also improve competition between brands by holding them accountable.

As Europe aims to change the way sustainability claims are developed and promoted, North and South America have yet to set standards for more truthful claims and outcomes, beyond the US’s FTC Green Guides intended to provide guidance to companies when approaching claims around sustainability.

The number of sustainability labels in the EU, with vastly different levels of transparency.

- 230
- 53%
- 40%

Source: European Commission Website, Green Claims
05 Refillable and reusable packaging

Consumers want refillable packaging to reduce environmental impact

71% of consumers engage in reusing activities, including the use of reusable shopping bags and refillable bottles and containers.

80% of consumers agree or strongly agree they would be interested in buying products that come in refillable packaging to reduce their environmental impact.
Interest is high among all age groups globally, but consumers between the ages of 35 and 54 are the most likely to purchase products in refillable packaging. Among growing consumer interest, businesses are continuing to expand their offerings to make refillable packaging and sustainability in general more accessible.

% of consumers very likely or likely to purchase a product based on a refillable packaging claim, by age

<table>
<thead>
<tr>
<th>Age</th>
<th>% Likely to Purchase</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>74%</td>
</tr>
<tr>
<td>25-34</td>
<td>79%</td>
</tr>
<tr>
<td>35-44</td>
<td>83%</td>
</tr>
<tr>
<td>45-54</td>
<td>82%</td>
</tr>
<tr>
<td>55-64</td>
<td>79%</td>
</tr>
<tr>
<td>64+</td>
<td>79%</td>
</tr>
</tbody>
</table>
To enhance sustainability for all – from its supply chain, all the way to the end consumer – BEG Boutique Distillery has introduced refillable packaging for its gin. Consumers can refill their original branded glass gin bottles at home from an aluminum one, which can then be recycled at home. When consumers buy products in refillable and reusable packaging, they are reducing their environmental impact, and can feel good about their purchasing choices.

Opportunity for brands

Using refillable and reusable products furthers a positive impact on the environment. Brands have the opportunity to evaluate new areas where refill/reuse may make sense in their product lines.

Improving sustainability in the supply chain

Refillable and reusable packaging
Sustainable packaging matters

This report demonstrates that consumers in the surveyed regions are already engaging in sustainable habits and value products more when they are packaged in sustainable materials. Providing more sustainable packaging and clearer sustainable claims, including advice on how to recycle their packaging, is a call to action for brands.

Trivium has been a pioneer in expanding the use of infinitely recyclable metal in packaging by offering a range of innovative solutions that help brands enhance packaging sustainability. Trivium solutions are designed and manufactured with a focus on sustainable practices in every phase of the company's operations.

The dedication to Trivium's sustainability journey is clearly reflected by external benchmarks received over the years. In 2022, Trivium was awarded a Platinum rating for the second year in a row by EcoVadis, placing Trivium in the top 1% of companies assessed. This however is not the end-game, and Trivium will continue to shape the future of packaging to ensure a better planet for everyone - today and for generations to come.

We contain what matters.
The findings in the 2023 Buying Green Report are as a result of one survey conducted by Euromonitor International. Trivium Packaging does not take responsibility for any independent reliance on the information as an outcome from this survey. Although all reasonable and diligent care has been used to ensure that the information provided in this report is accurate, complete and up-to-date, nothing contained herein shall, or may, be construed to imply any representation or warranty of any kind, including but not limited to, any representation or warranty as to the accuracy, currency or completeness of this information or non-infringement of any third party (intellectual property or proprietary) rights. Trivium Packaging has no obligation to update any statements contained in this report, unless required by applicable law.