

2022

GLOBAL BUYING GREEN REPORT

Preference for Sustainable
Packaging Remains Strong
in a Changing World



TRIVIUM
PACKAGING

CONTENTS

Tracking the Evolution of Consumer Sentiment Related to Sustainable Packaging.....	3
Takeaways for Brands.....	4
Supporting Sustainable Values with Actions.....	5
Behaviors Follow Values in All Regions	
A Changing Landscape Guided by New Regulations.....	7
Consumers Want Refillable Packaging Solutions.....	9
Growing Number of Consumers Willing to Pay More for Sustainable Packaging.....	11
The Value of Infinite Recyclability in a Circular Economy.....	14
COVID's Impact on Sustainability is Declining.....	15
Driving Business Value.....	16
Supporting Sustainability in Packaging	

Tracking the Evolution of Consumer Sentiment Related to Sustainable Packaging

Trivium Packaging is a global manufacturer of innovative and infinitely recyclable metal packaging solutions and is committed to supporting objective research that advances transparency in the packaging industry. The Buying Green Report is one example of this commitment. The report presents the results of a study of consumer values and behaviors related to sustainable packaging conducted by the **Boston Consulting Group**.

Trends Crystallize Over Three Years of Data Collection

The 2022 Buying Green Report is based on a survey of more than 15,000 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. Survey questions explored participants' values and behaviors related to sustainable packaging, including their willingness to pay more for eco-friendly packaging.

The data collected through Buying Green surveys over the last three years provide insight into consumer trends related to packaging sustainability amid a changing world, including the impact of the pandemic on values and behaviors.



Takeaways for Brands

Consumer demand for eco-friendly and sustainable product packaging has proven remarkably stable and robust throughout the societal changes that have occurred in the last several years.

More than two-thirds of global consumers consistently identify as environmentally aware, and most of those translate their values into behaviors. Behaviors identified by the study include choosing to buy products in sustainable packages as well as avoiding products in packaging that is considered harmful to the environment.

70% identify as environmentally aware. **↑3%**
Momentum continues to grow around environmental awareness. This year saw the largest percentage of consumers identifying as environmentally aware in the three-year history of the study.

Consumers Identifying as Environmentally Aware



66%

consider it important to purchase products packaged in environmentally friendly materials.

Consumers want to choose packaging that they consider to be environmentally friendly and are actively seeking information to help them make decisions based on their values.

86%

of younger consumers (18-44) are willing to pay more for products in sustainable packaging. **↑3%**

Younger generations strengthened their commitment to sustainable packaging and continue to lead the way in rewarding brands for moving to sustainable packaging.

NEW FINDING

74%

expressed interest in buying products in refillable packaging.

Consumers want products in recyclable packaging, but they also recognize the value of extending the life of packaging through reuse. Almost three-quarters expressed an interest in refillable packaging.

Supporting Sustainable Values with Actions

The world is markedly different from when the first global Buying Green survey was conducted in early 2020. The pandemic has changed the way we work, socialize, and obtain products.

But even while some consumers said they de-prioritized sustainability due to the pandemic, attitudes and behaviors associated with sustainable packaging proved resilient. In fact, key measures of those attitudes and behaviors are stronger this year than at any time in the history of the survey.

NEW FINDING

68%

have chosen a product in the last six months based on its sustainability credentials.

This result aligns closely with the 70% of consumers who identify as environmentally aware and demonstrates that consumers are translating awareness into action.

54%

actively look for recycling and sustainability information on packaging. **↑2%**

Consumers seek information to confirm that the product choices they make are environmentally conscious and continue to turn to product labeling for information on the sustainability credentials of the package.

57%

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

Brands risk losing their market share when they cannot meet consumer demand for sustainable packaging. More than half of consumers are “less likely” to buy products in harmful packaging, and 44% said they “won’t buy” products in packaging that is harmful to the environment.



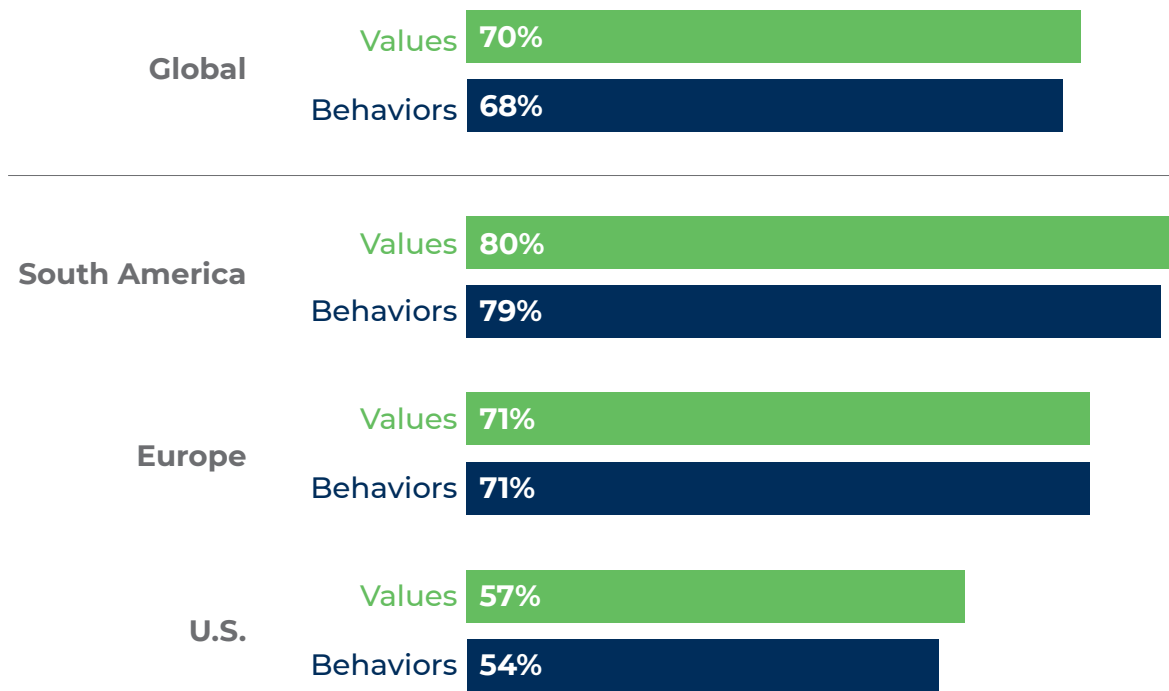
Behaviors Align With Values in All Regions

More than two-thirds of consumers said they had made purchasing decisions in the last six months based on sustainability features. This demonstrates how consumers are translating sustainability values into action to support brands that align with those values. That is creating growth opportunities for sustainability-marketed products as documented by the **Stern Market Share Index**.

Across all regions included in this research, consistent trends were found between consumer “values” and “behaviors.” Values are represented by consumers who identify as environmentally aware. Behaviors are represented by consumers who have made purchasing decisions in the last six months based on a product’s sustainability credentials.

South America leads in the percentage of consumers identifying as environmentally aware and those taking actions based on that awareness. Four out of five consumers in this region consider themselves environmentally aware, and almost as many make purchase decisions based on sustainability values. All regions show more than half of consumers identifying as environmentally aware with behaviors aligning with values.

Behaviors Close the Gap with Values



MANY REGIONS. ONE PLANET.



A Changing Landscape Guided by New Regulations

The sustainable packaging movement is being driven by much more than end consumer demand. Sustainability has become a major initiative for many organizations that have established goals for reducing emissions and waste.

The environmental impact of packaging is also driving increased regulation, which is primarily targeted to plastic packaging. One notable example is a resolution now being considered by the United Nations designed to reduce the impact of plastics on the environment by taking a circular economy approach to plastic design, manufacturing, use, and disposal, known as the **global plastic treaty**.

This momentous step is being considered due to concerns over the growing impact of plastic pollution. According to the **UN Environmental Programme**:

*Without urgent action, the estimated **11 million metric tons of plastic** currently entering the ocean annually will triple in the next twenty years. This would mean between **23 and 37 million metric tons** of plastic flowing into the ocean every year by 2040. That is equivalent to **50 kilograms of plastics per metre** of coastline worldwide.*

Other factors driving the effort to reduce the use of plastic until the material can support a circular economy include:

More than **five trillion pieces of plastic are in the world's oceans**, which can take years to break down.

40% of the 400 million tons of plastic produced is used once before being thrown away.

More than **eight million tons of plastic enter the world's oceans** each year, and most of that escapes from land.

Not all plastic can be recycled, either because of the way it's made or because it's too expensive or difficult to do so.



With consistent media coverage highlighting the impact of waste on the environment, consumers are paying attention. According to the survey results, consumer perception of plastic as an eco-friendly material continues to lag other materials.

89%

do not consider plastic packaging to be eco-friendly.

64%

associate plastic with ocean pollution.

56%

consider plastic harmful to the environment.

Many global brands have developed targets for their packaging to be 100% reusable or recyclable to bend the curve on single-use packaging consumption toward circular solutions. This may help drive consumers to solutions that extend packaging life, such as refillable packaging.



Consumers Want Refillable Packaging Solutions

The most effective approach to waste reduction is to not create it in the first place, as there is an environmental cost to the production of all materials. Reduction, reuse, and infinite recyclability work together to conserve resources and protect the environment.

As a result, the refillable movement is gaining traction as more brands launch refillable product options and consumers are increasingly open to trying these solutions.

74% of consumers said they would be interested in buying products that come in refillable packaging.



Petal is one example of a brand that has used refillable packaging to strengthen its environmental credentials. The company offers stylish aluminum hand-soap dispensers that can be refilled with soap pods, which are packaged in infinitely recyclable aluminum containers, and water.

Three Main has taken a similar approach with home cleaning products, and **Bubble Tree** has brought the concept to a favorite childhood activity: blowing bubbles. Bubble Tree's colorful, kid-friendly aluminum packaging features an ergonomic grip and cap-attached wand. Best of all, the bottle is refillable, so the fun doesn't end when the original container is empty.

The strategy is even being employed by ultra-premium products such as **O.U.i's** Eau de Parfum that are sold in uniquely shaped, distinctive glass bottles. The fragrance in the glass bottle can be refilled from elegant aluminum threaded bottles, which provide a high degree of protection for valuable fragrances while offering infinite recyclability and supporting a luxury experience.



Opportunities for Brands: Refillable Packaging

Liquid-based personal care and household products represent an excellent opportunity for refillable packaging. With refillable packaging, brands can invest in premium, ergonomically designed packaging that has strong shelf appeal while offering low environmental impact. Refillable packaging can also reduce supply chain costs and increase customer loyalty as consumers seek to extend their investment in refillable packaging. In this way the concept of refilling could change the art of customer retention for brands in some categories. Aluminum bottles are emerging as the preferred solution for refillable packaging due to the lightweight and durable qualities of the material. It does not rust or break and so it is ideal for use in bathrooms and kitchens. Aluminum also has a high recycling rate and can be recycled infinitely.

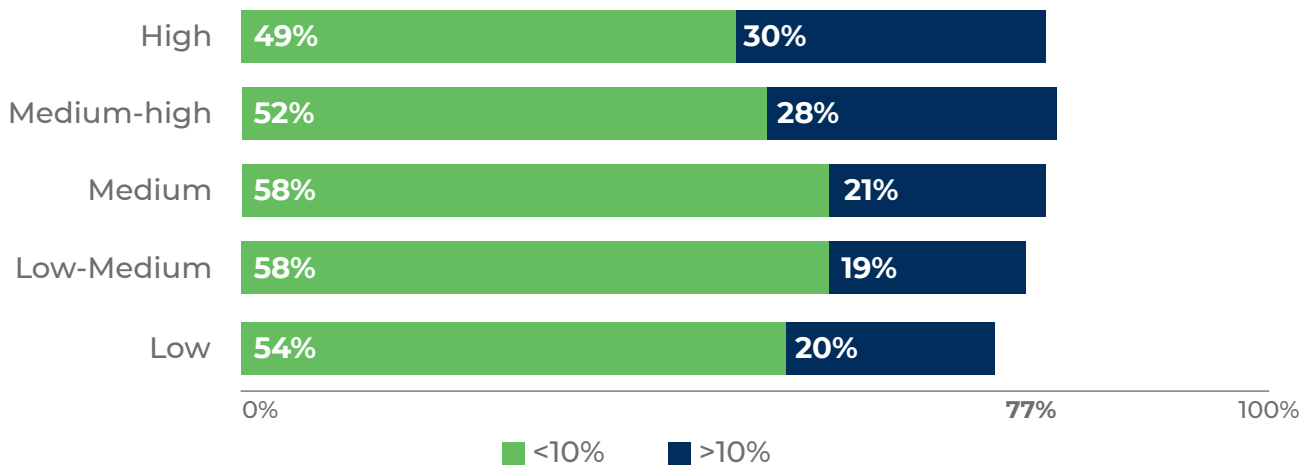
Growing Number of Consumers Willing to Pay More for Sustainable Packaging

Consumer interest in sustainable packaging is clear, but brands also need to consider the financial implications of switching to more environmentally friendly packaging. Sustainable materials are not always the least expensive packaging option. Brands must consider the overall value and return when investing in more sustainable packages. This year's results bring good news to those considering the transition to sustainable materials:

77% are willing to spend more for products in sustainable packaging. **↑4%**

And the percentage of consumers willing to pay 10% more for sustainable packaging jumped by 3% compared to last year. The income distribution of those willing to pay more matches the overall income distribution of survey participants, indicating willingness to pay is not income dependent.

Willingness to Pay by Income

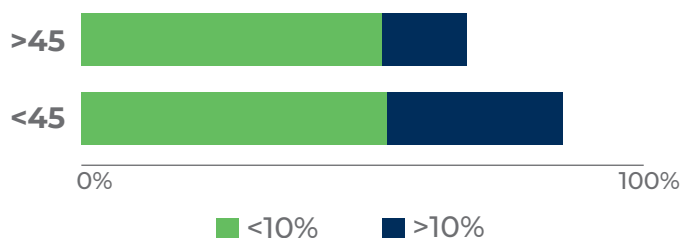


86%

of younger consumers (18-44) are willing to pay more for sustainable packaging. ↑3%

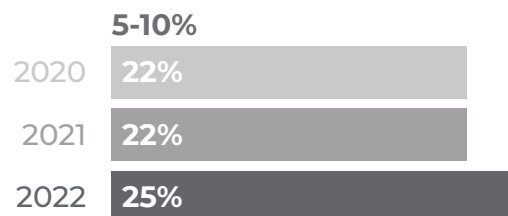
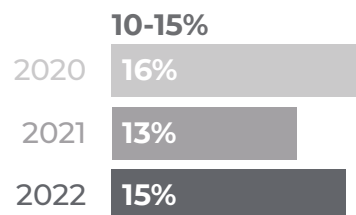
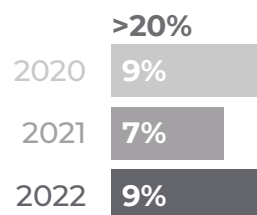
Consumers younger than 45 are 18% more likely to be willing to pay more than those 45 and above. The generational difference is primarily attributable to the percentage of younger consumers willing to pay 10% more for products in sustainable packaging.

Willingness to Pay by Age



Research from NielsenIQ aligns closely with the results of the Buying Green study. According to that study, 72% of surveyed respondents around the world said they would be willing to pay a premium for products that claim to be sustainable – and 20% of global consumers would be willing to pay a lot more for sustainable products.

Willingness to Pay Three-Year Trend



Identifying Regional Differences

While overall results are generally consistent across regions, there are variations that may guide brands in tailoring their strategy and marketing:

South America

This region has the highest percentage of consumers identifying as environmentally aware was **80%** and the highest willingness to pay more for eco-friendly packaging was **73%**. However, the region has a low recognition of the sustainability of metal packaging compared to the U.S. and Europe. There is an opportunity for brands using metal to increase awareness of metal as an infinitely recyclable material with high recycling rates to strengthen their position.

United States

The U.S. saw a **3%** increase in those identifying as environmentally aware and a **4%** increase in those who say it is important that the products they buy are packaged in environmentally friendly materials. The U.S. also had a higher percentage of consumers willing to pay 10% more for products in sustainable packaging at **13%**. These factors create an opportunity for brands to launch premium products in metal packaging.

Europe

Consumer concerns related to plastics showed that more than **60%** of respondents considered plastic to be harmful and relate plastic to ocean pollution. With **51%** of consumers in this region saying they won't buy products in packaging harmful to the environment, there is a significant opportunity for brands to move from plastic to alternate packaging materials.



The Value of Infinite Recyclability in a Circular Economy

Recycling processes are different depending on the material being recycled and the region. That makes it difficult for consumers to recognize the best way to recycle their packages and therefore they tend to rely on the information provided on the package. The white paper **Protect, Promote, and Preserve: Defining the Optimal Packaging for Food** outlines the importance of proper and sufficient communication in packaging production.

Increased focus on the circular economy across industries is likely to reward materials like metal and glass that have a high recycling rate and can be recycled infinitely. In a circular economy, it's essential that materials can retain their original qualities through the recycling process and provide the same functionality as the original material.

Of the two infinitely recyclable packaging materials – metal and glass – a higher percentage of consumers consider glass recyclable than they do metal, even though metal is recycled at a higher rate than glass. In addition to their sustainability benefits, both materials are considered more premium than plastic and liquid carton packaging.



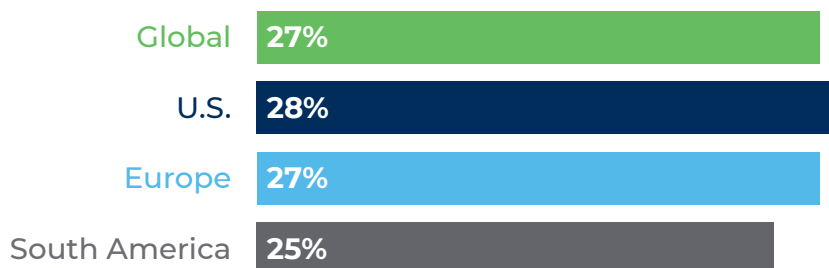
Opportunity for Brands: Helping Consumers Make Sustainable Decisions

54% of consumers actively look for sustainability information on packaging. Yet, the misperceptions associated with some materials found in the study highlight an opportunity to create more awareness about the actual sustainability of various materials. Showcasing sustainability information on packaging is part of the solution, but packaging can only do so much. Brands that take a more holistic approach to sustainability marketing by making packaging material part of their story on their website and through advertising and promotion can help align perceptions with reality and strengthen their sustainability credentials.

COVID's Impact on Sustainability is Declining

It was no surprise last year – and isn't again this year – that some consumers reduced their focus on sustainability due to the pandemic. The impact was slightly larger in the U.S. but was relatively consistent across regions.

Percentage of Consumers De-prioritizing Sustainability Due to COVID



Despite the de-prioritization of sustainability that occurred in the last two years, many of the sustainability trends tracked in the Buying Green Report rose to new levels this year. There are several possible explanations for this.

First, many environmentally aware consumers have integrated sustainable decision-making into their day-to-day lives. For them, sustainability has become second nature and drives decisions even when de-prioritized. Consumers also spent more time at home during the pandemic, where they were faced with the prospect of dealing with more of their own waste. Consumers who increased their e-commerce purchases became more aware of the volume of packaging associated with those purchases and the importance of recycling packaging materials. The same may be true for food, beverage, and personal care products. According to the NielsenIQ Report **Sustainable Business: The New Force to Be Reckoned With**, "The pandemic spurred consumers to shop their values more than ever."



Driving Business Value

The data in this year's Buying Green Report presents a strong case that transitioning to sustainable packaging is not only the right decision for the environment, but also the right decision for the business.

A study by the **Stern Center for Sustainability Business at New York University** found that products marketed as sustainable grew more than seven times faster than those not marketed as sustainable and outpaced the growth of their categories by 90%.

The **previously cited report from NielsenIQ** reinforces this finding, stating that, *"The business case is becoming clearer by the day: we see increasing spend, and growth rates that exceed the industry for sustainable products."*

Metal packaging is perfectly aligned with a circular economy, as it replaces a "take-make-dispose" logic with closed material loops. Once produced, metals exist forever and can be used, reused, and recycled endlessly without any loss of quality. The material is also lightweight, durable, and perceived as premium by consumers.

Supporting Sustainability in Packaging

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. Manufactured to world-class standards, Trivium Packaging solutions are designed and manufactured with a focus on sustainable practices in every phase of our operations. The company has achieved a leadership score in the 2021 Carbon Disclosure Project, a Platinum EcoVadis rating, and had made an official commitment to the Science-Based Targets initiative (SBTi) across the value chain.



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