

2023

# Buying Green Report

The message is clear:  
sustainable packaging matters

**TRIVIUM**  
PACKAGING

# Buying Green Report

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# 01 Understanding the evolving mindset around sustainability

## 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 – forever, with optimal circularity. Sustainability 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, including the impact of inflation.

\*The term sustainable packaging was not defined as part of the survey and so was left to individual respondent's own interpretation.





# 02 Embracing sustainability through packaging

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.**

We found that people in all the surveyed regions are adopting sustainable practices into their daily lives and purchases. The majority of respondents said they are carrying out more sustainable actions such as refilling bottles and containers, reducing food and packaging waste, purchasing products in sustainable packaging, and buying local.



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.





## Increasing consumer attention

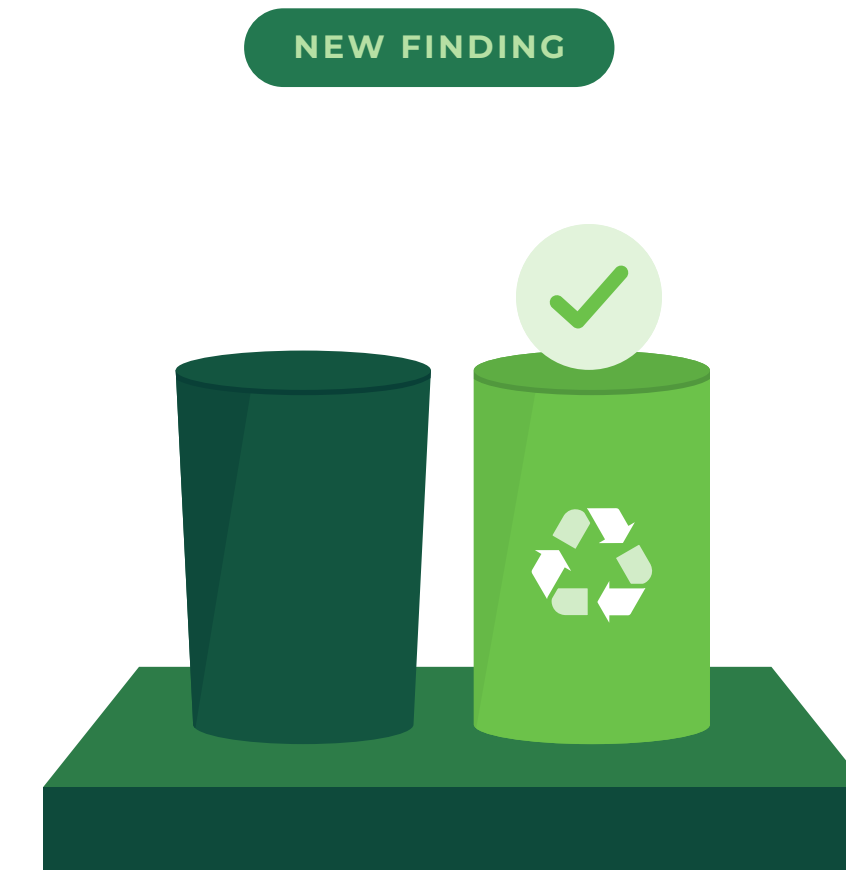
In addition to reusing and recycling, another way for consumers to live more sustainably is purchasing products in sustainable packaging. In comparison to last year's report we are seeing an increase in consumers choosing packaging based on its sustainability credentials, and fewer are likely to buy products they consider environmentally harmful.

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



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.



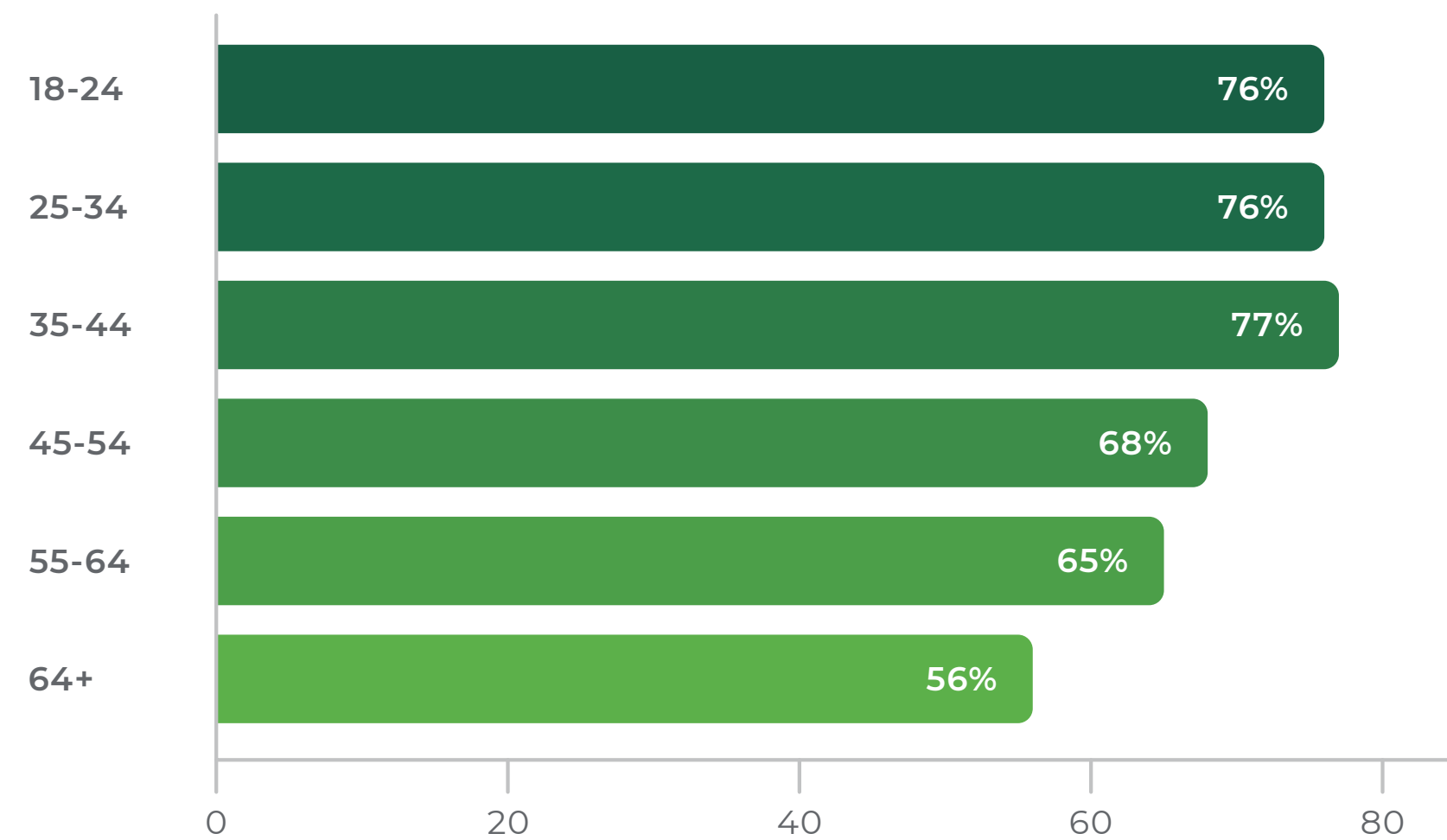
## Increasing consumer attention

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.

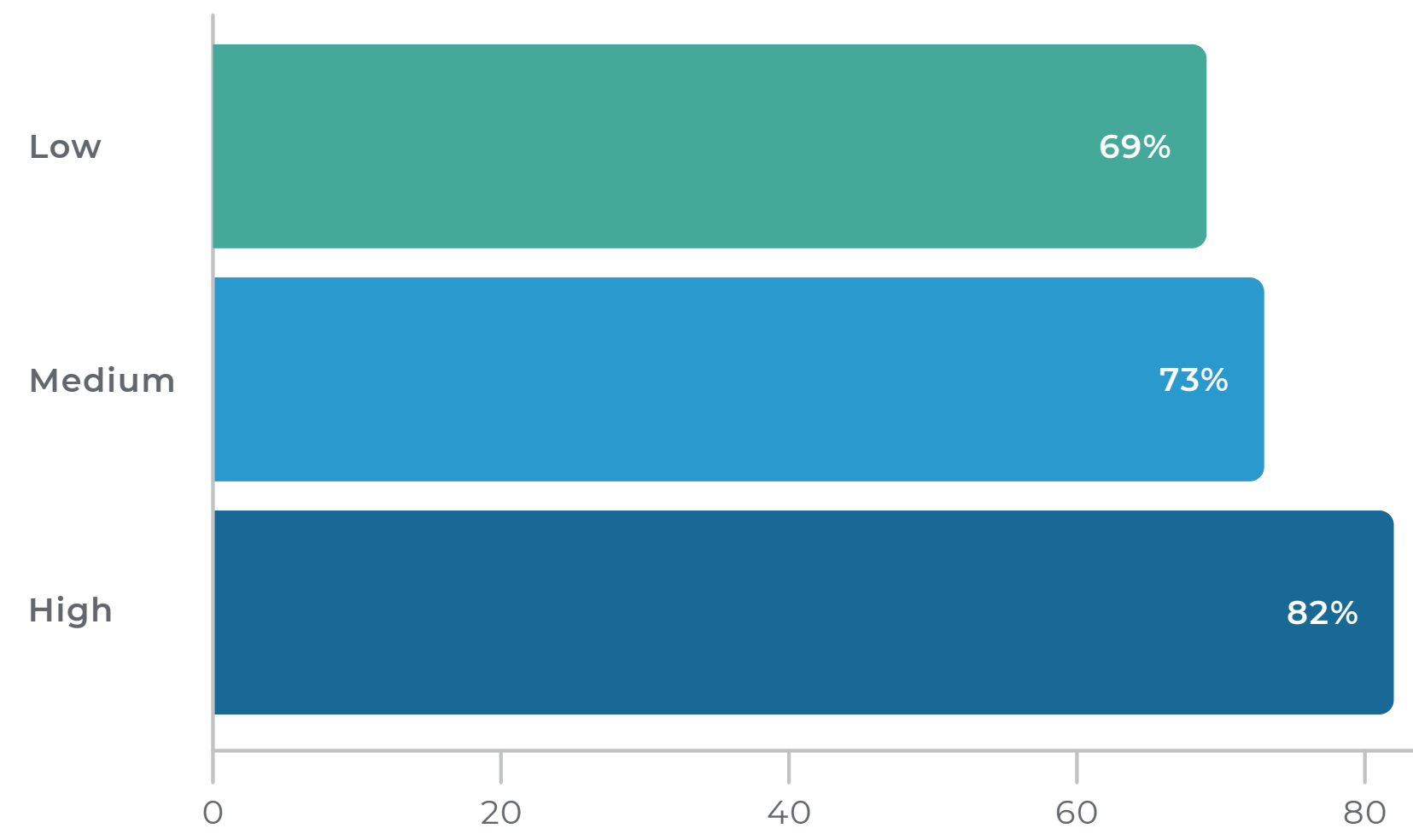
All respondents showed an interest in sustainable packaging, however younger and higher income earners are more likely to purchase products in sustainable packaging.

### Comparison of buying choices by age and income level

% of consumers by age choosing to buy a product at least in part due to sustainable packaging



% consumers by income choosing to buy a product at least in part due to 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 across categories.

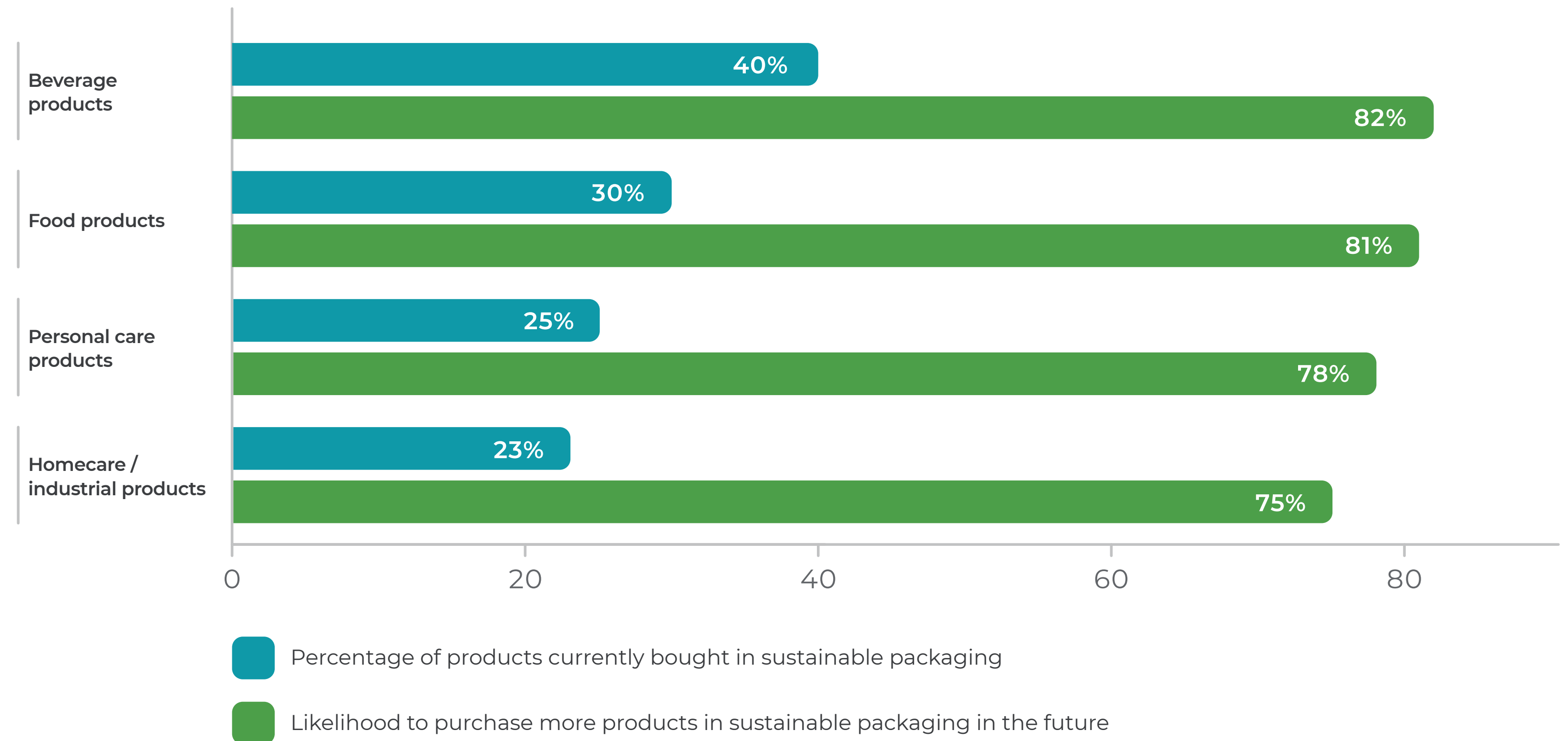
Despite this growing interest, a gap exists, with *more than half* of consumers surveyed saying that most of the products they currently buy do not have sustainable packaging.

**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**





## Regional variations

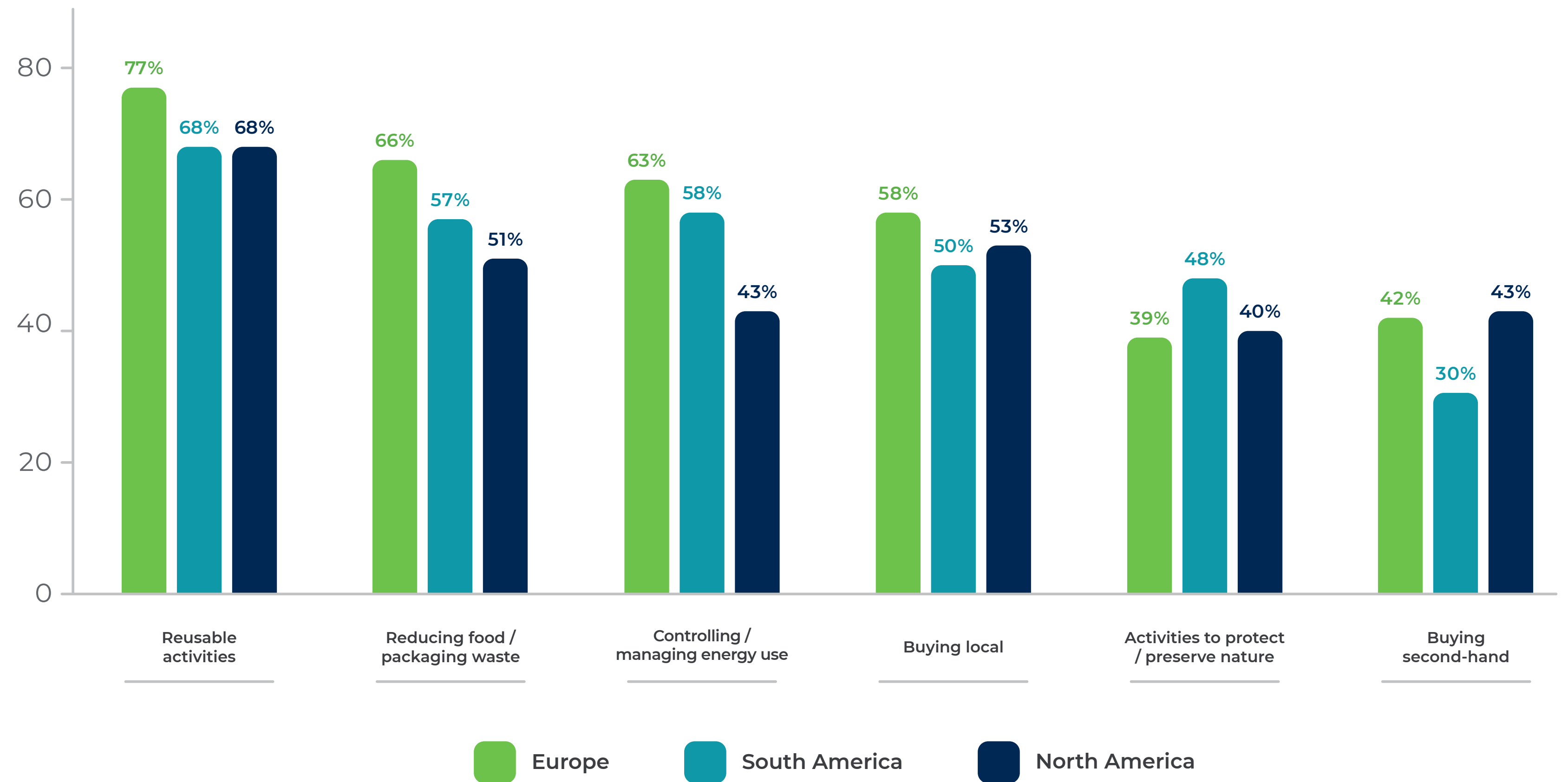
Our survey highlighted differences in the commitment to sustainability – and engagement with sustainability practices – in different regions.

We found that 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





## 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 any other region. Although people in this region still have strong sustainable beliefs, values, and behaviors,

**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

Sustainability plays an important part for North American consumers as well. More than **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%**),

more than consumers in the other regions. For instance, 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.

## Regional attitudes towards sustainable packaging

75%+

of **Europeans** value purchasing products in recyclable or environmentally friendly packaging.

71%

of respondents in **South America** consider themselves to be environmentally aware, 5% higher than the 66% reported globally.

52%

of consumers look for sustainable packaging when they buy products.





## Misleading claims around recyclability

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

Many companies have been accused of making misleading claims about the recyclability of their packaging, which has led to misconceptions among consumers.

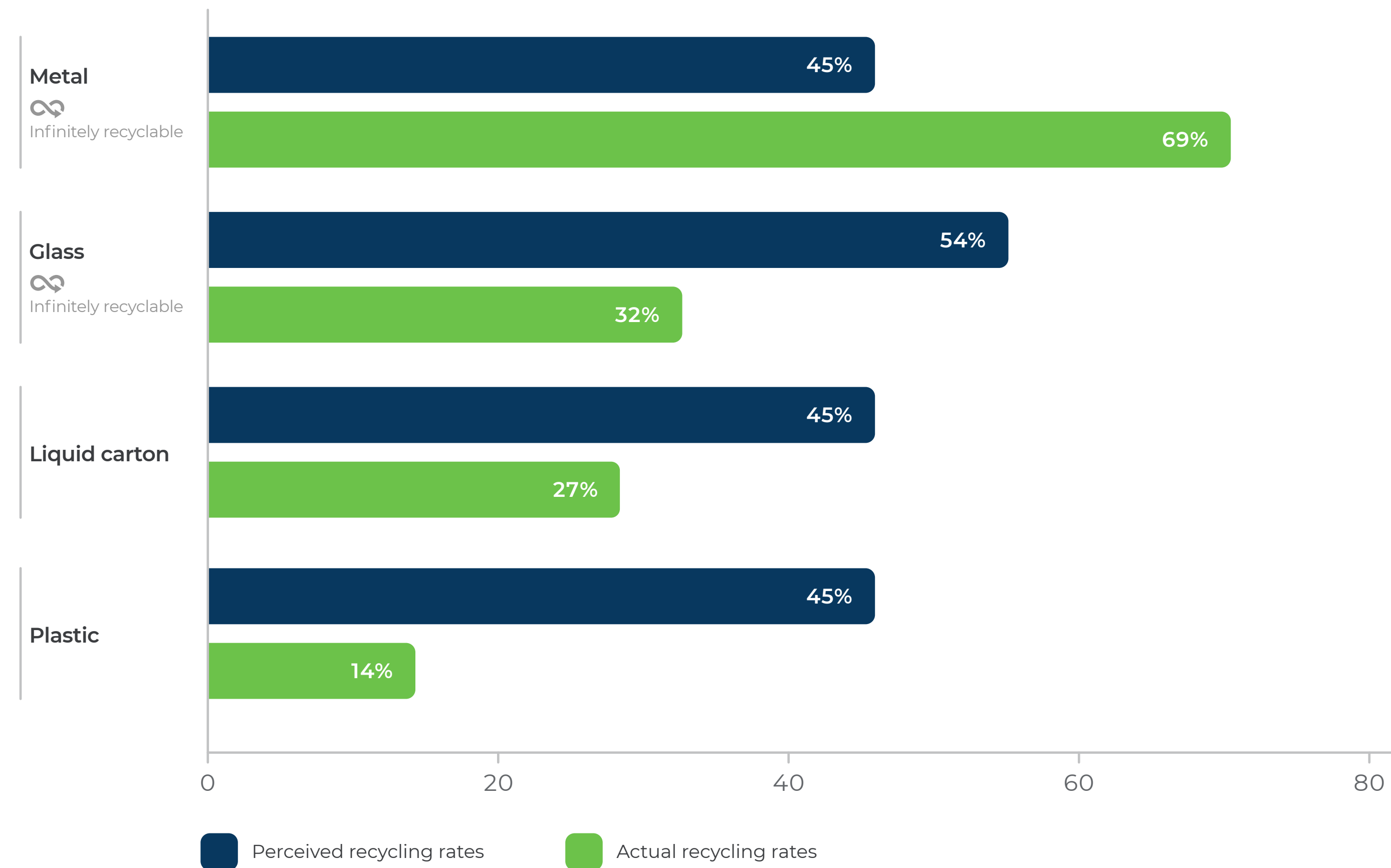
As a result, consumers may mistakenly believe that certain types of packaging are often recycled when they are not, and the other way around. For instance, in the United States, the Environmental Protection Agency (EPA) reports a recycling rate of 13.6% for plastic containers and packaging, while, on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

Consumer perceptions on recyclability do not always reflect reality.

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



Sources:

Metal global recycling rate: [Global Recycling & International Aluminium Institute](#)

Glass global recycling rate: [Recovery, Recycling Technology Worldwide](#)

Liquid carton recycling rate: [Tetra Pak Sustainability Report](#)

Plastic global recycling rate: [World Economic Forum](#)



# The benefits of metal packaging

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

Despite having an inaccurate view of recycling rates, consumers in the surveyed regions see metal as having great potential as a sustainable packaging material. When asked about words they associate with metal packaging, most consumers associated the material with being both **recyclable** and **durable**.

These positive associations around recyclability and durability of metal are in line with the, sustainable benefits the material provides. As metal packaging is already very familiar to consumers, increasing its use as a sustainable packaging solution could be easy and effective.



## Recyclability

Consumer perceptions of metal packaging



52%

of consumers associate metal packaging with being recyclable.



### Actual sustainable benefits

Metal packaging is infinitely recyclable meaning the material can be recycled forever ([more info on page 17](#)).

## Durability

Consumer perceptions of metal packaging



47%

of consumers associate metal packaging with being durable.



### Actual sustainable benefits

Metal packaging is durable, protecting contents from contamination, spoilage, and damage to deliver the highest quality product.



# 03 The effect of tough economic times

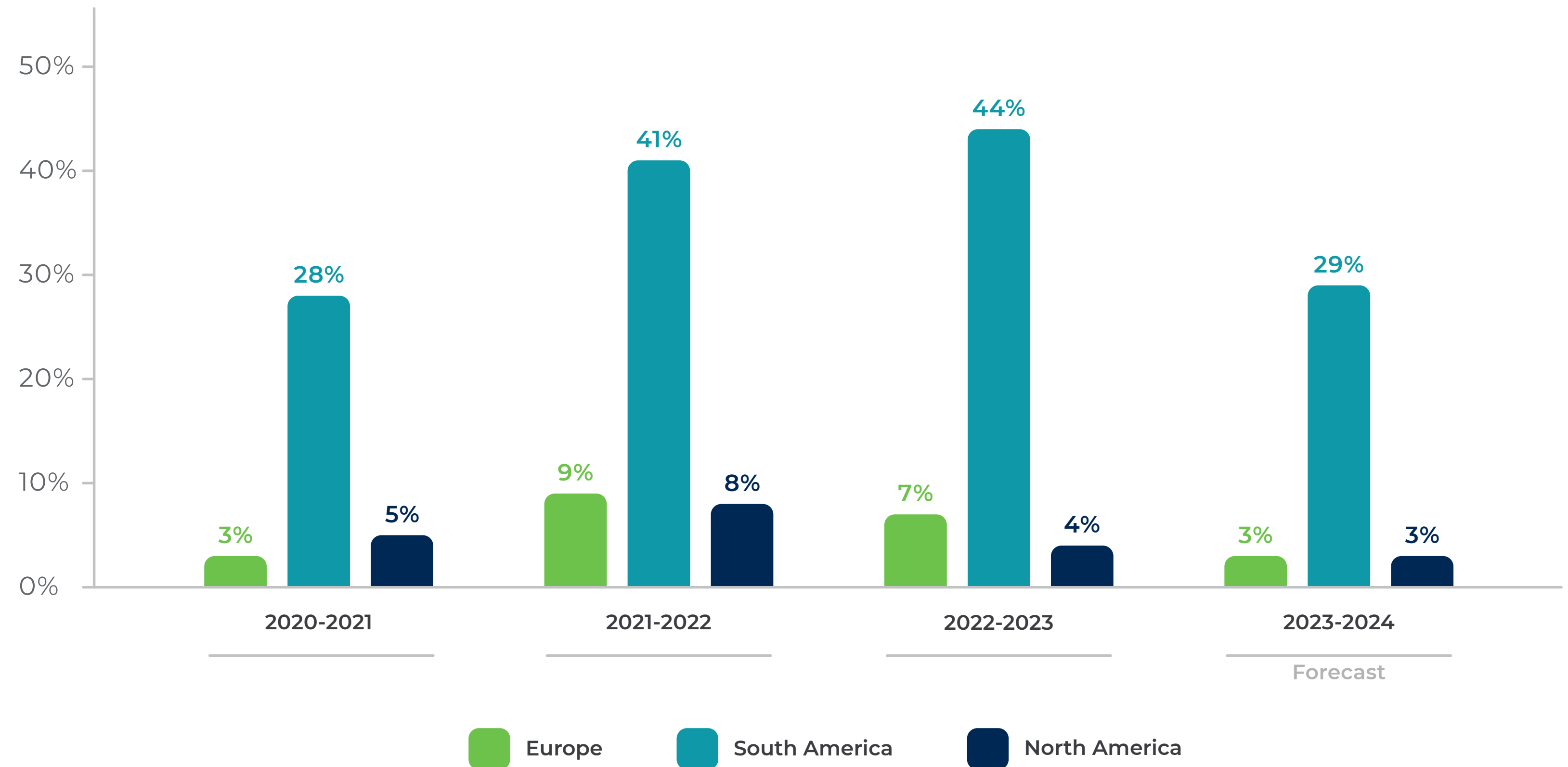
## Sustainable packaging beats budgets

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.

% year over year growth of consumer prices regionally



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

A significant percentage of consumers from each region are still focused on sustainable packaging solutions in light of inflation.





## Consumers are still willing to pay more

Despite price concerns and pressures from inflation, the value of sustainable packaging remains high, with consumers often willing to pay more for products with these benefits.



82%

of consumers would be willing to pay more for sustainable packaging.\*

29%

are willing to pay over 10% more for sustainable packaging.\*

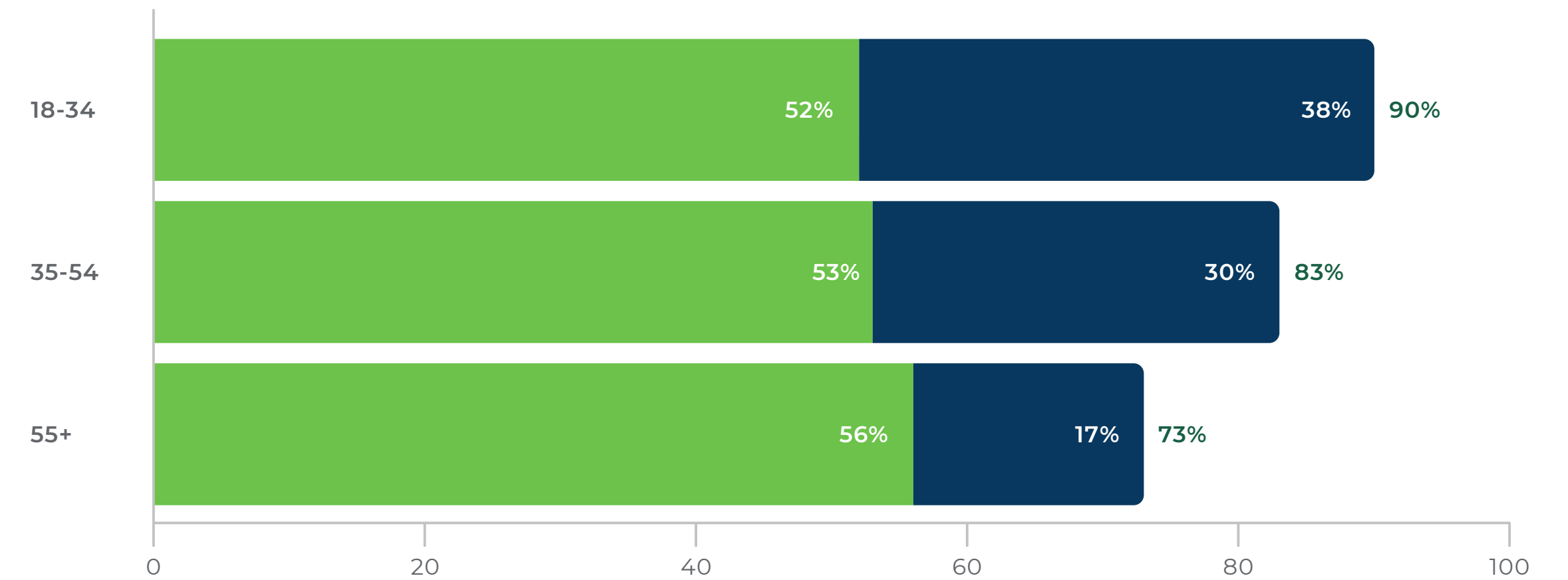
↑6 pts from 2022

↑9 pts from 2021

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

Younger consumers between the ages of 18 and 24 are the most willing to pay more for sustainable packaging, demonstrating their commitment to these types of products and acceptance of higher prices.

In fact, on average 88% of consumers younger than 45 said they are willing to pay more, a significantly higher percentage than among consumers above this age (74%).

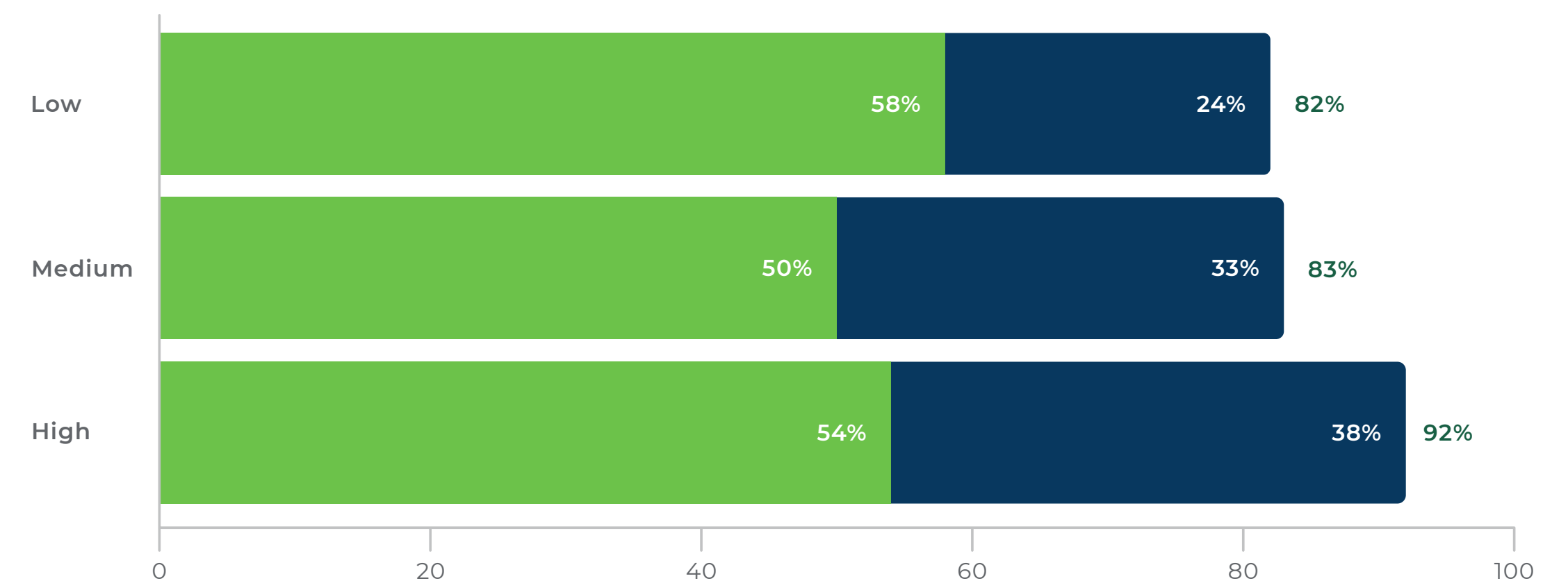


### % of consumers are willing to pay more for sustainable packaging, by income\*

#### Willing to pay

up to 10% more

over 10% more



\*In reference to the question: For a product that currently sells for \$5 in a non-sustainable package, how much more would you pay for the product if it was sold in a sustainable package?

# 04 Making sustainability more intuitive

## Clear information

We found that consumers need to understand sustainable claims.

Consumers are increasingly searching for information about the sustainability of packaging on products they buy, but find sustainability claims not clear enough. They are often confused by the wide range of sustainability callouts, labels, and features on products.



↑  
5pts



# 59%

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

NEW FINDING



# 26%

of consumers are unsure what sustainable features to look for when considering a product for purchase.

NEW FINDING



# 46%

of consumers said unclear labeling is a barrier they face when thinking about purchasing products with sustainable features.



## Sustainability claims on packaging

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.

**NEW FINDING**

86%  
South America

77%  
Europe

85%  
North America

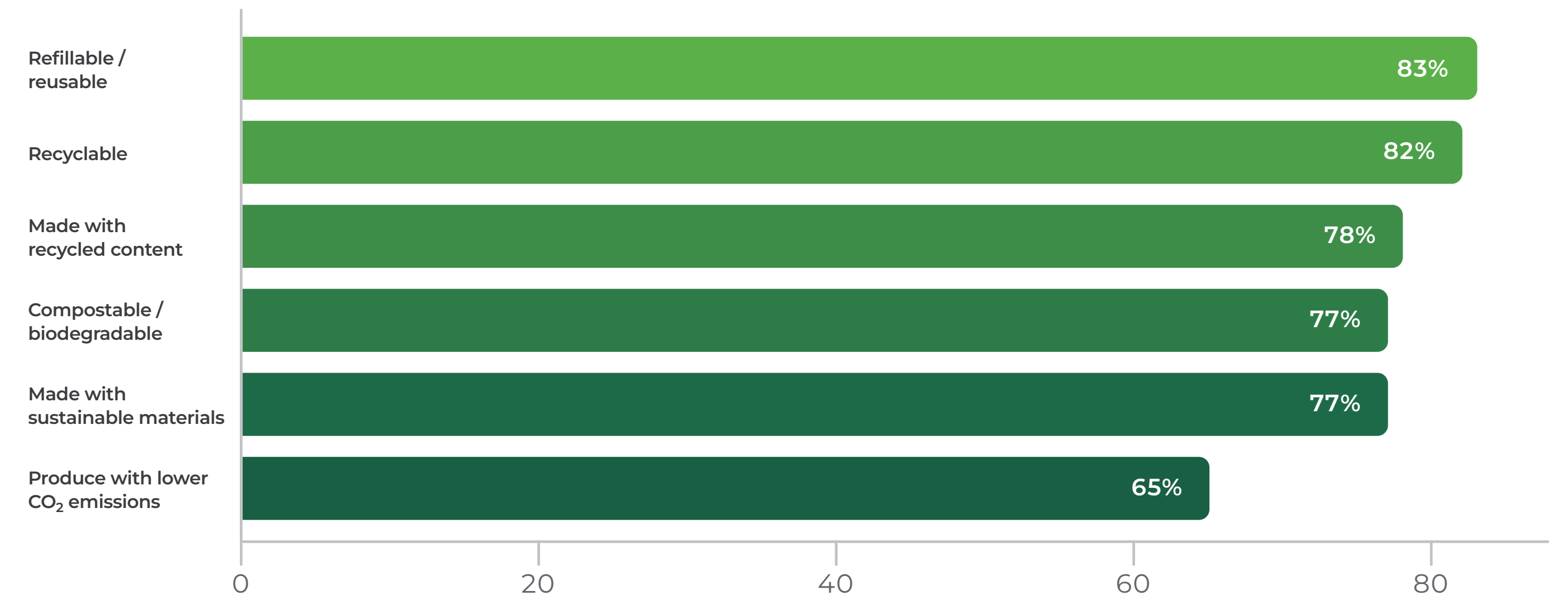
of consumers want to trust the sustainable product claims on packages.

## 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 CO<sub>2</sub> emissions”.

**NEW FINDING**

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



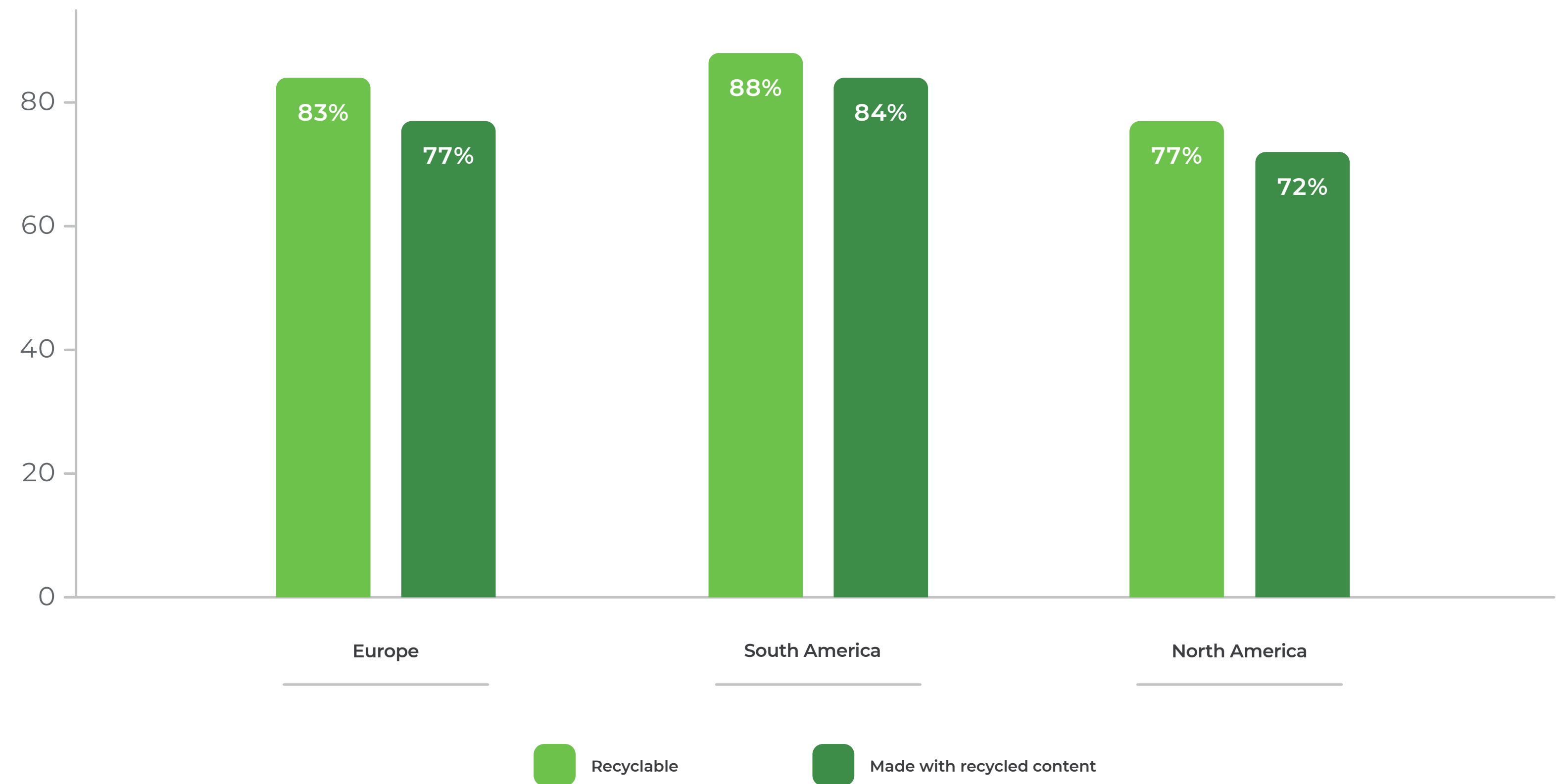
Reflective of this, consumers across all regions prioritize products that list “recyclable” as a claim over those labeled with “made with recycled content”.

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 of the material. When a metal product reaches the end of its useful life, the material is never lost. Through recycling, its value is retained forever, making it available today and for future generations. In fact, **80% of all metal ever produced\*** is still in use today.



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



\*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 any 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.



230

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



53%

of green claims in Europe give vague, misleading, or unfounded information.



40%

of green claims in Europe have no supporting evidence.

Source: European Commission Website, Green Claims



# 05 Refillable and reusable packaging

## Consumers want refillable packaging to reduce environmental impact

More consumers look for products that fit in with their sustainable activities, such as refilling bottles or containers, or reusing bags.

These activities, are easy for consumers to incorporate into their routines, are cost-effective, and allow them to clearly see how they are contributing to saving the planet.



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.



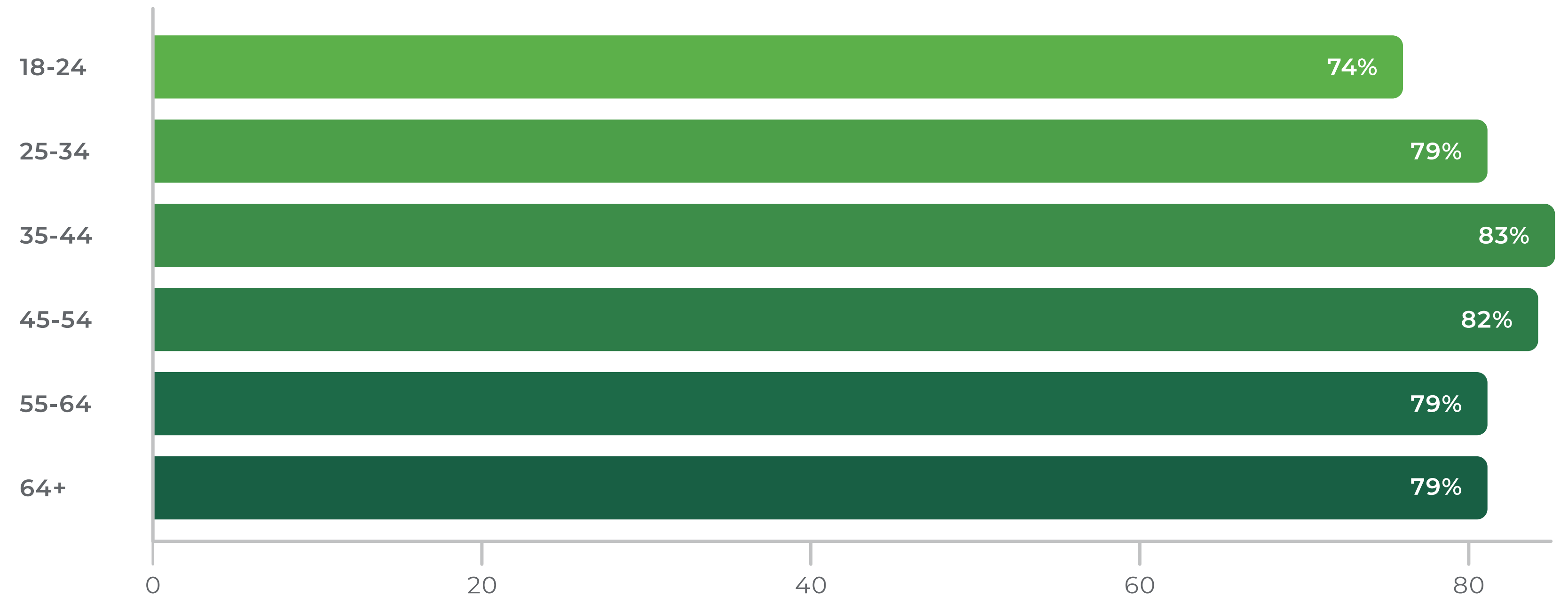


Interest is high among all age groups globally, but consumers between the ages of 35 and 54 are the most likely to purchase products in refillable packaging.

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**







## Improving sustainability in the supply chain

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.



# 06 Sustainable packaging matters

With a strong focus on sustainable packaging 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.

Let this be a call to action for brands to support consumers, providing more sustainable packaging and clearer sustainable claims including advice on how to recycle their 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. 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, which places Trivium in the **top 1%** of the 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.**





2023

# Buying Green Report

**TRIVIUM**  
PACKAGING

for more information, contact us at  
[www.triviumpackaging.com](http://www.triviumpackaging.com)

The Buying Green survey was conducted by



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.