



InSites Consulting



FEVE
The European Container
Glass Federation



**WEBER
SHANDWICK**

Packaging & Recycling survey

FR, IT, DE, ES, UK, PL, PT, AT, HR, CZ, SK, CH, TR

EXTRACT OF RESULTS – April 2020

For: FEVE & Weber Shandwick

By:

Thierry Meerschaert, Business Director

T +32 9 269 15 27 | E Thierry.Meerschaert@insites-consulting.com

Isabelle Peeters, Research consultant

T +32 9 269 15 38 | E Isabelle@insites-consulting.com

Simona Salcudeanu, Research Manager

T +32 9 269 14 08 | E Simona@insites-consulting.com

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www.insites-consulting.com

Methodology

Method: Online survey

Recruitment: Online research panels

Interview length: 15 minutes

Countries:

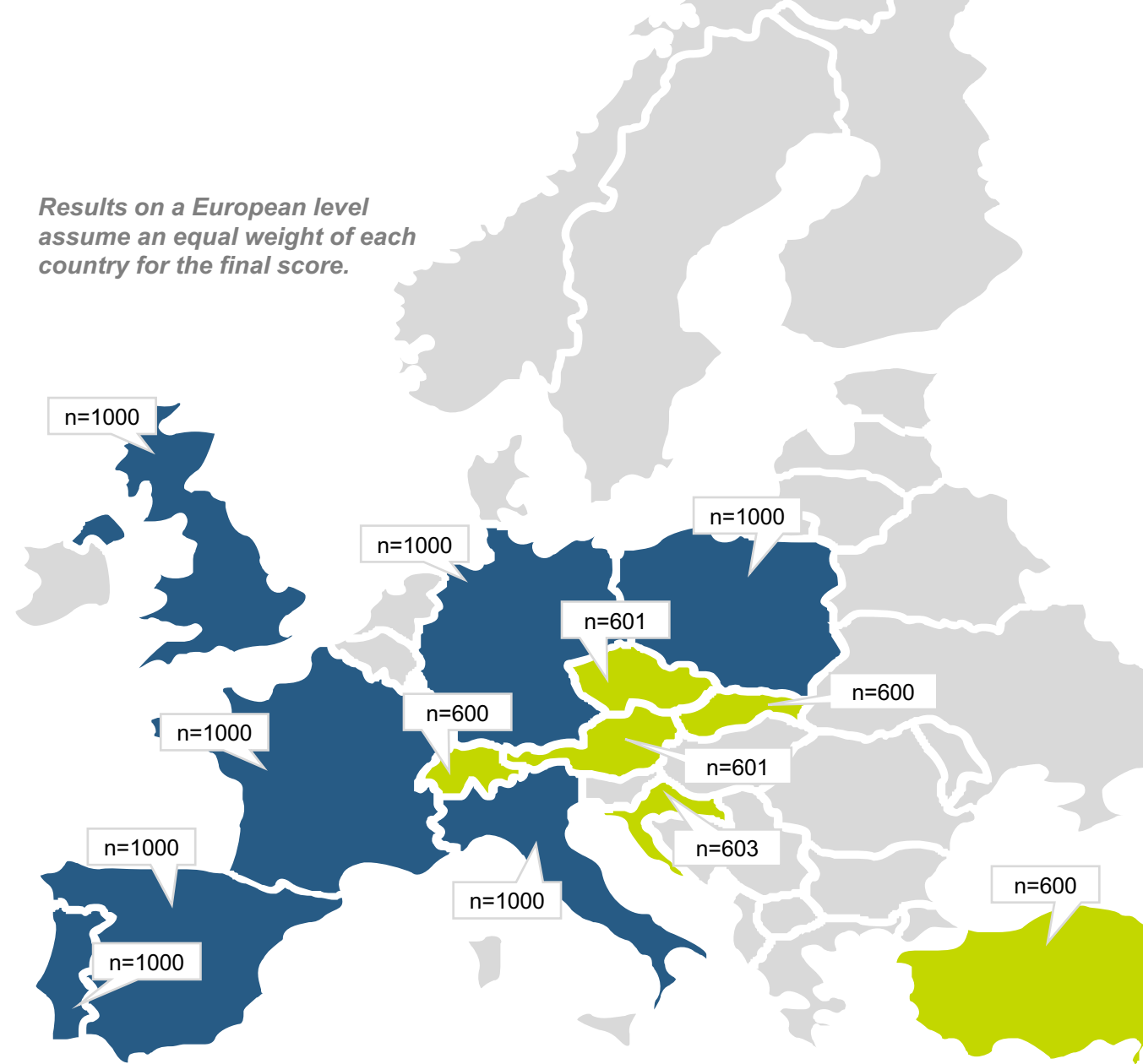
- **Tier 1:** France, Italy, Germany, Spain, UK, Poland & Portugal
- **Tier 2:** Austria, Croatia, Czech Republic, Slovakia, Switzerland & Turkey

SAMPLE

(n=10 605)

- Nationally representative on age (within gender), age between 25-65 y.o.
- Gender: 75% women / 25% men
- Tier 1: n=1000 per country
- Tier 2: n=600 per country

Results on a European level assume an equal weight of each country for the final score.



A consumer perspective on glass packaging

CURRENT VIEW & RECOMMENDATIONS

- 1. EU consumers are highly concerned about littering of food containers and see it as an important decision driver in food & beverage purchase.**
- 2. EU consumers perceive glass as 'best in class' in addressing all issues related to food & beverage packaging; while plastics are perceived as worst in class.**
- 3. Glass is perceived as most recyclable food & beverage packaging material; plastics is at bottom of the list. For most consumers recycling packaging is no worry, and if so, it is related to recycling plastics.**
- 4. European consumers are buying more glass than before, mainly because it is more recyclable.**

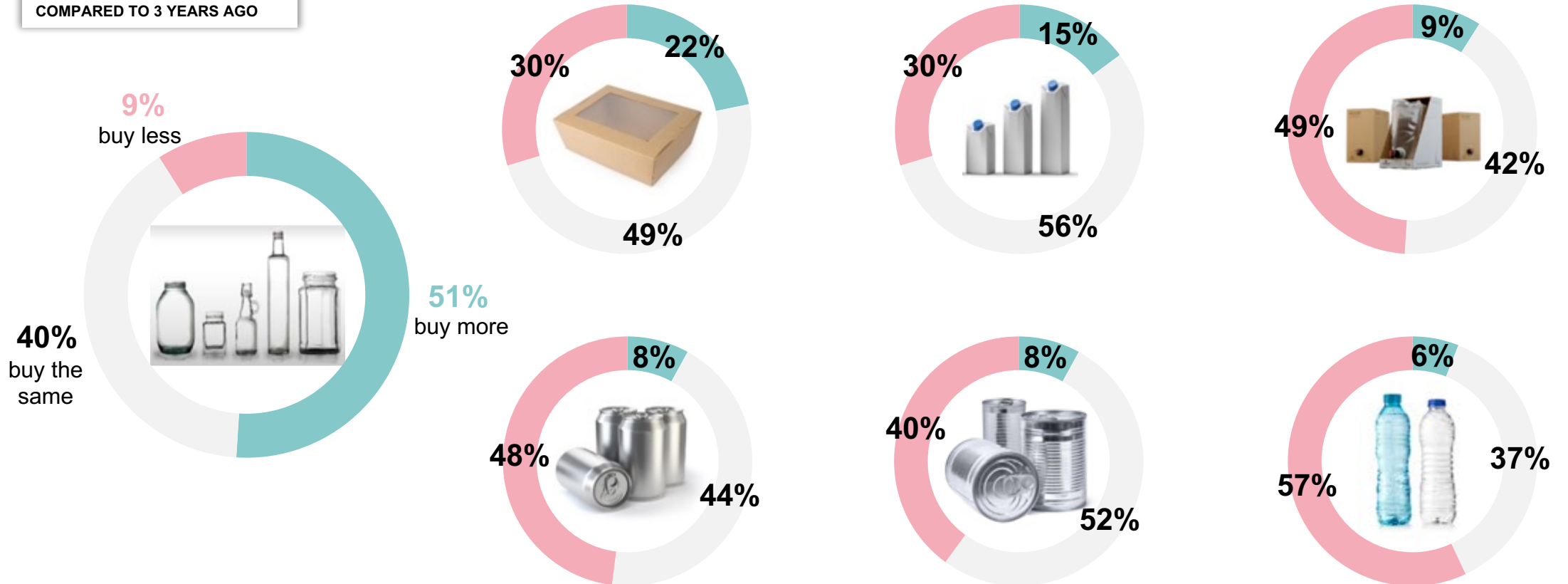


With a clear positive trend on the great perception of glass, high trust in the qualities of glass and plastics under intense pressure, European consumers are open to changing their behaviour around purchasing and recycling glass packaging, and are using more products in glass packaging.

Half of European consumers buy more glass packaging than 3 years ago; more than half are buying less plastic packaging for food and drinks

EVOLUTION OF PACKAGING

COMPARED TO 3 YEARS AGO

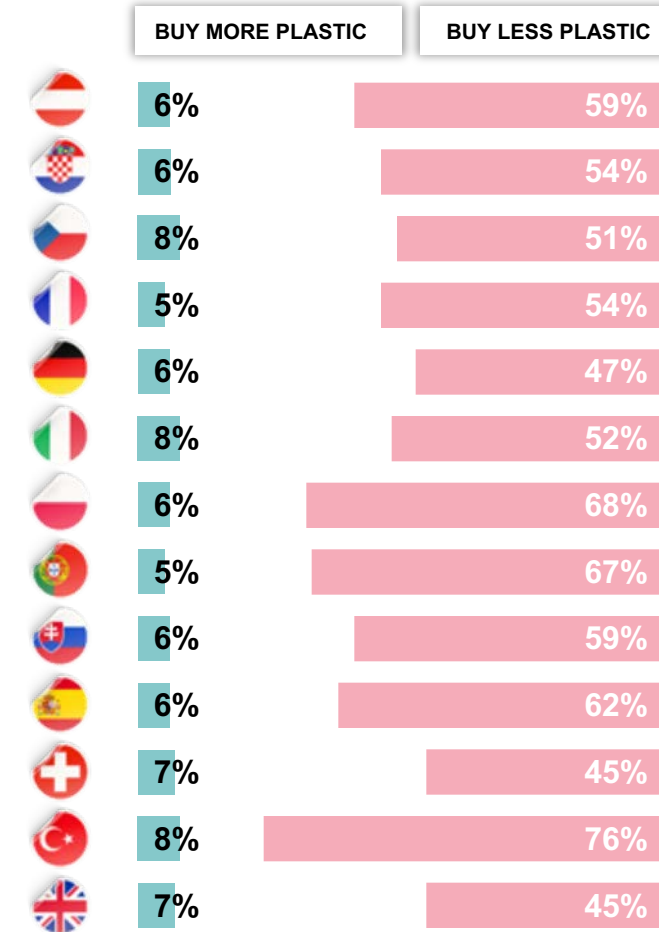
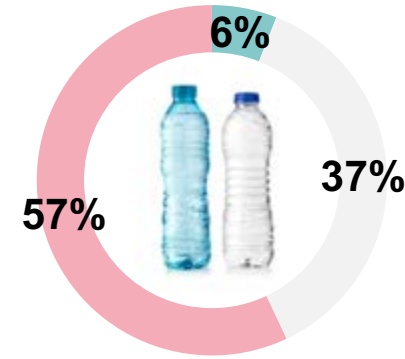
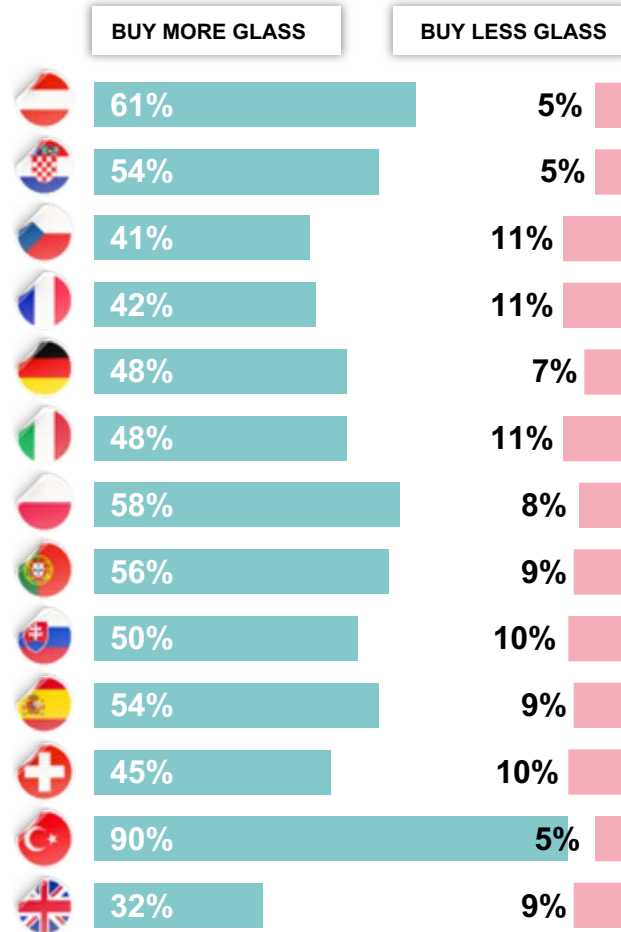
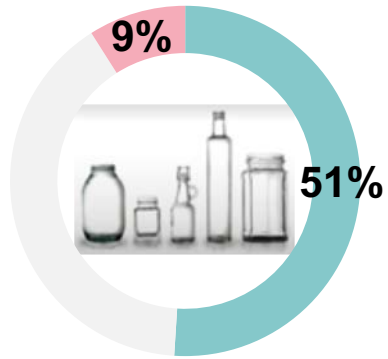


Q: Compared to 3 years ago, in what way has your purchase of each of the following food and beverage packages evolved? | n=10 605 | Filter: None

In all EU markets many consumers are buying more glass than before:

EVOLUTION OF PACKAGING

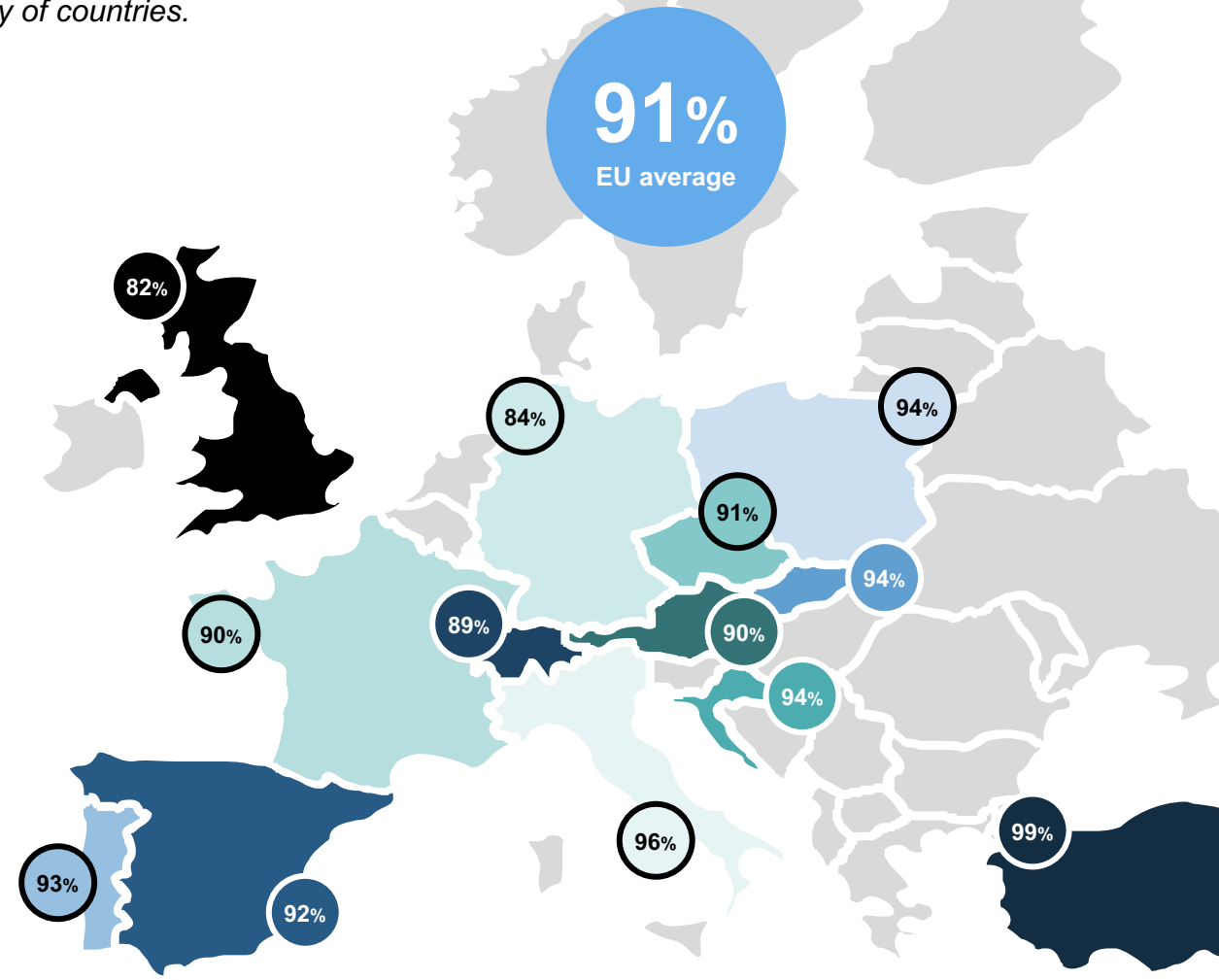
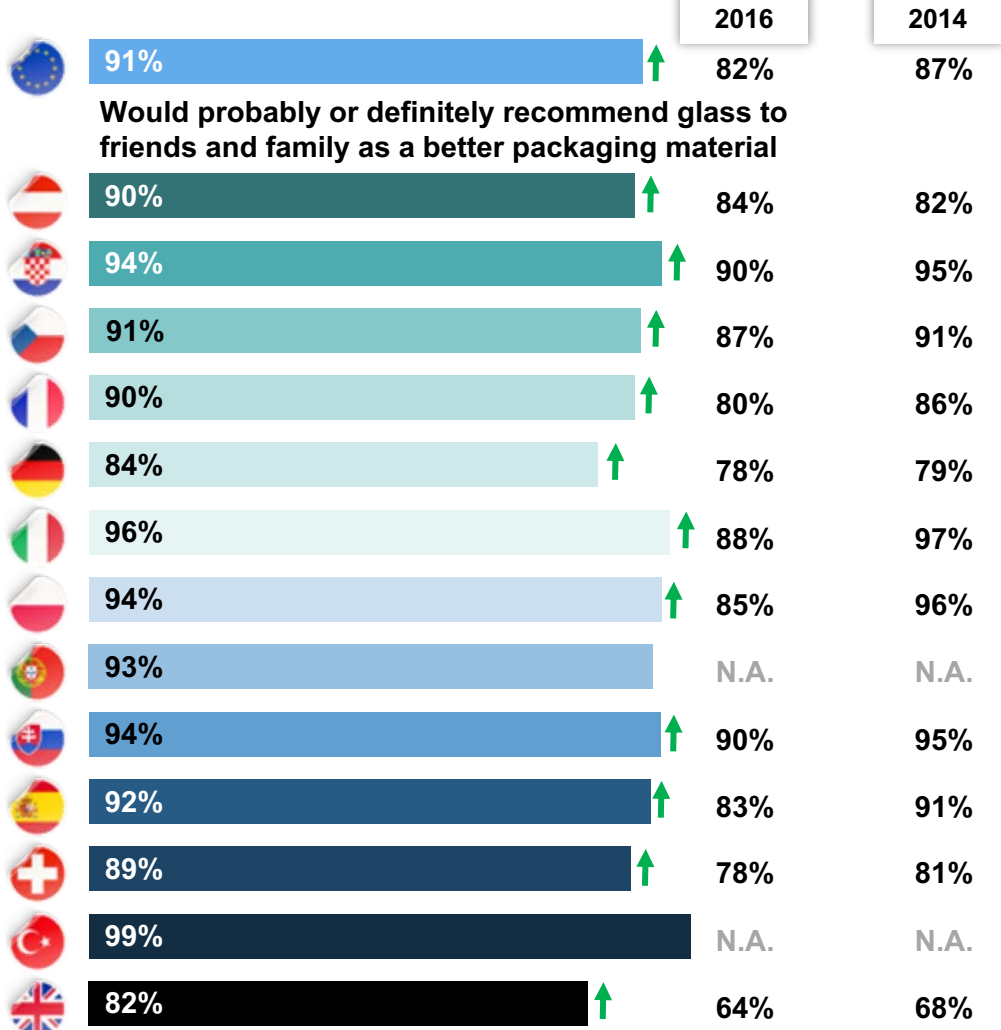
OVER PAST 3 YEARS



Q: Compared to 3 years ago, in what way has your purchase of each of the following food and beverage packages evolved? | n=10 605 | Filter: None

9 out of 10 Europeans would recommend glass as a better packaging material to friends and family

The popularity of glass has increased significantly across Europe – 91% of consumers would recommend glass as a better packaging material, with this high preference present in the majority of countries.



Q: Would you recommend glass as a better packaging material to friends and family? | n=10 605 | Filter: None

↑ ↓ Significantly higher/ lower than 2016

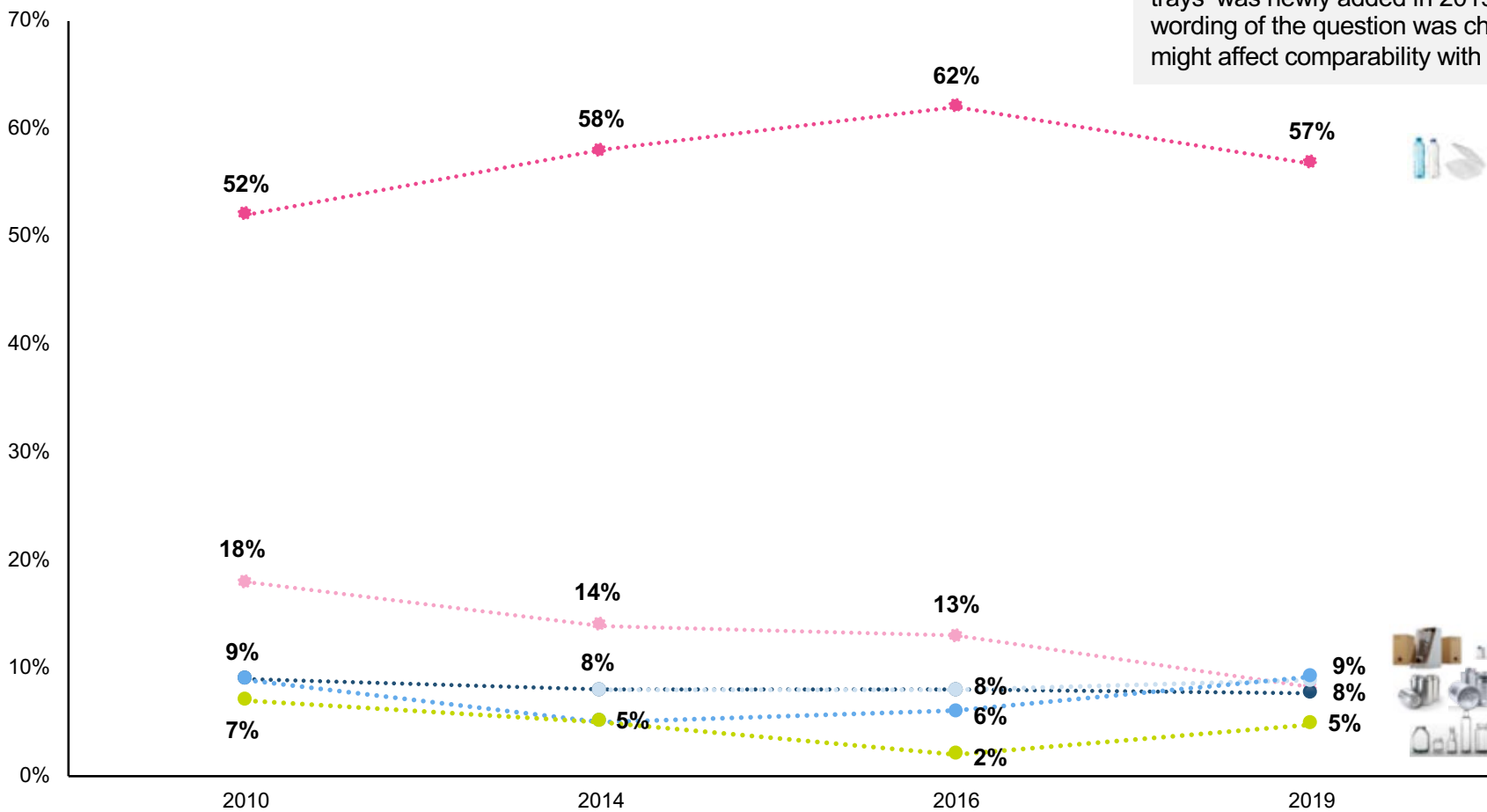


Glass is consistently scoring as most environmentally friendly packaging material across the years

LEAST ENVIRONMENTAL FRIENDLY PACKAGING



Note: The packaging 'carton boxes and food trays' was newly added in 2019. Also the wording of the question was changed. This might affect comparability with previous waves.



2019: Which of the following packaging solutions do you think is a key cause (or aggravator) of climate change? | n=10 605 | Filter: None

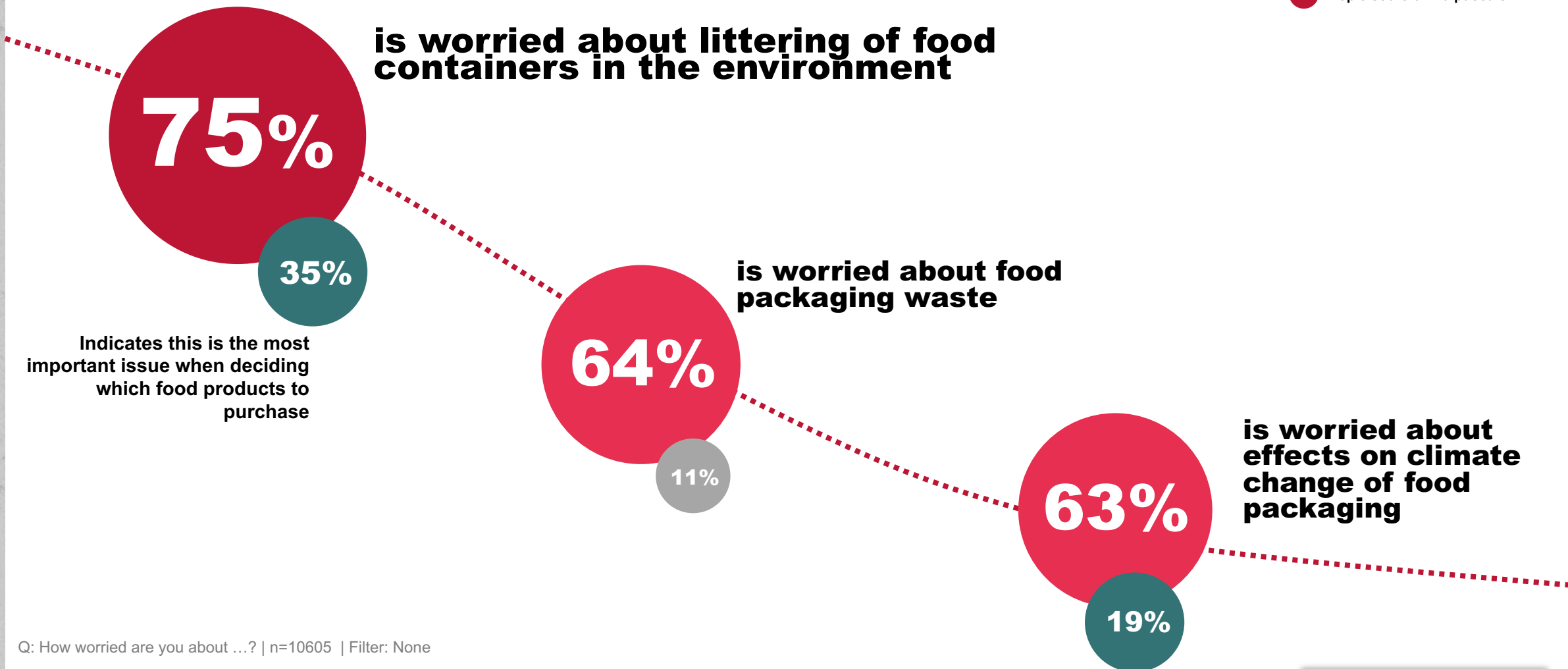
Previous waves : Please select from the list below the one packaging material that you think of as being the least friendly to the environment in general. | Filter: None



3 out of 4 Europeans are highly worried about littering of food containers in the environment

European citizens are most worried about littering in the environment, while 1 in 3 also considers this to be the most important issue related to food & beverage packaging when making a purchase decision.

● Top 3 score on 10-pt scale



Q: How worried are you about ...? | n=10605 | Filter: None

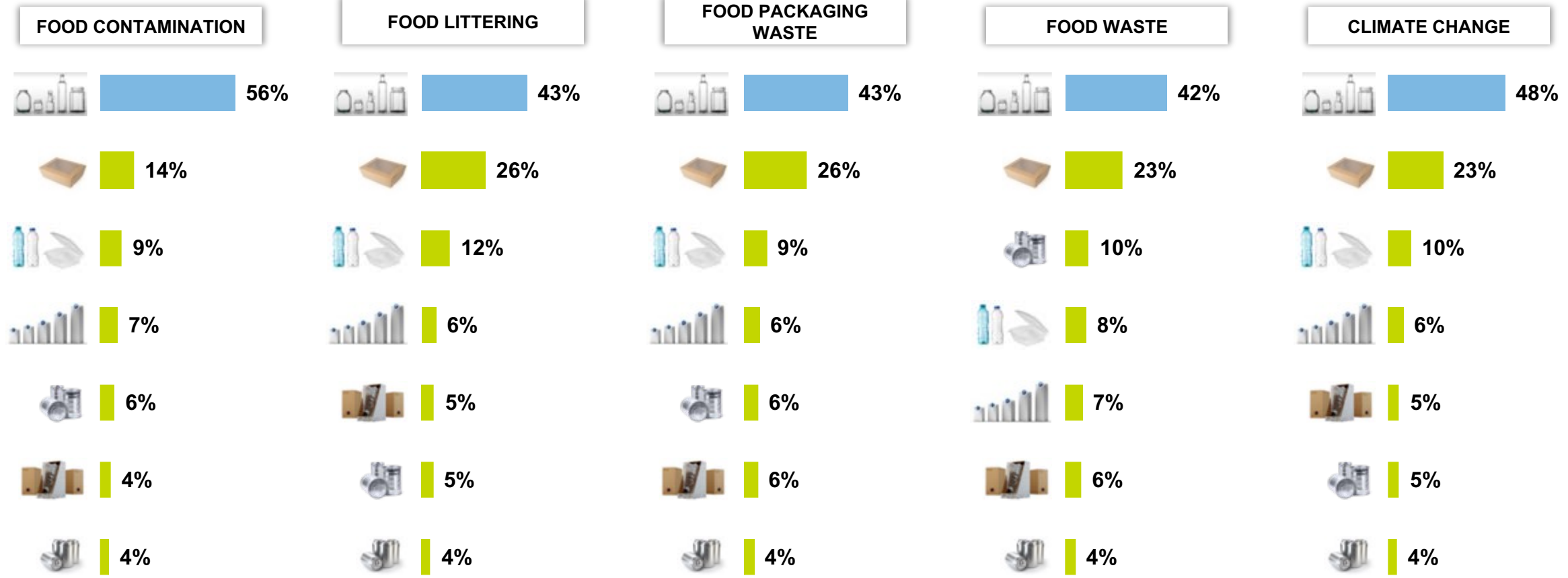
Q: Which of these issues related to food & beverage packaging is most important to you when deciding which food products to purchase? | n=10 605 | Filter: None



Glass performs best in preventing all contamination and environmental issues

Carton boxes and food trays come in second place, while European consumers believe metal tins are the least optimal packaging to prevent food-related and environmental issues.

ADDRESSES ISSUES BEST



Q: Which of the following packaging solutions do you think **best addresses** each of these issues? | n=10 605 | Filter: None



Consumer attitudes & SHOPPER BEHAVIOUR

Which packaging material do consumers currently use for beverage and food packaging material? And which material do they prefer? What is the evolution in usage of packaging materials over the past years?



According to European consumers glass best addresses all issues related to food & beverage packaging

Glass is seen as the least likely to aggravate environmental issues and is even considered best in addressing them.

think glass is a key aggravator of...

- 3%
- 3%
- 5%
- 5%
- 3%

KEY AGGRAVATOR OF FOOD & BEVERAGE RELATED ISSUES

72% of European consumers think plastic is a key aggravator

61% of European consumers think plastic is a key aggravator

53% of European consumers think plastic is a key aggravator

58% of European consumers think plastic is a key aggravator

50% of European consumers think plastic is a key aggravator

FOOD LITTERING

FOOD PACKAGING WASTE

FOOD CONTAMINATION

CLIMATE CHANGE

FOOD WASTE

BEST ADDRESSES FOOD & BEVERAGE RELATED ISSUES

43% of European consumers think glass best addresses

43% of European consumers think glass best addresses

56% of European consumers think glass best addresses

48% of European consumers think glass best addresses

42% of European consumers think glass best addresses

Q: Which of the following packaging solutions do you think is a **key cause (or aggravator)** for each of these issues? | n=10 605 | Filter: None

Q: Which of the following packaging solutions do you think **best addresses** each of these issues? | n=10 605 | Filter: None



Glass is the most preferred packaging for the majority of food & beverage products in Europe

Glass is the most preferred packaging material for most food & beverage products, with as many as 8 out of 10 Europeans preferring to buy their wine and spirits in glass. However, European consumers prefer metal tins over glass when it comes to preserved fish & seafood and carton boxes & trays for their vegetables.

**PREFERRED
PACKAGING**



(n=10605)



(n=10605)



(n=10605)



(n=10605)



(n=10605)



(n=10605)



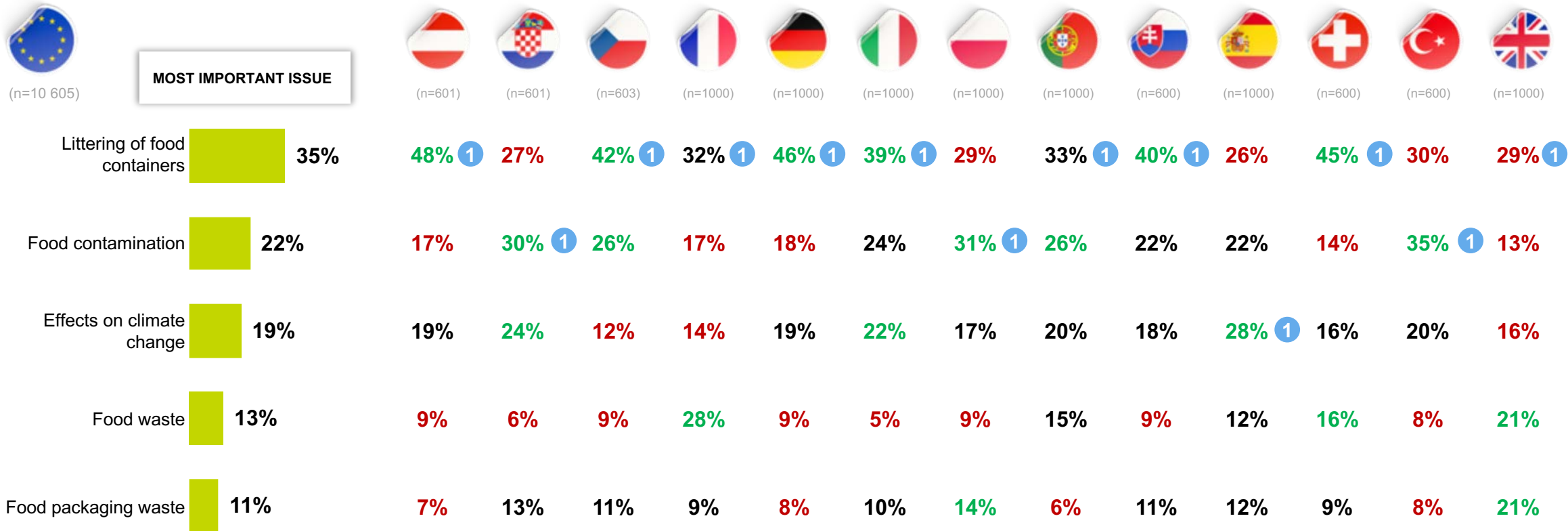
(n=10605)

Product Type	Glass	Plastic	Metal Cans	Cardboard	Metal Tins	Metal Tins	Carton
Wine	86%	2%	3%	1%	1%	1%	2%
Spirits	84%	3%	2%	1%	2%	1%	1%
Sweet spreads	74%	6%	3%	5%	1%	3%	2%
Beer	70%	2%	2%	1%	16%	3%	1%
Sauces	65%	7%	7%	4%	2%	6%	4%
Baby food	59%	3%	6%	5%	2%	4%	4%
Oil	59%	17%	3%	1%	2%	4%	1%
Non-alcoholic beverages	54%	19%	15%	1%	5%	2%	2%
Dairy products	43%	12%	34%	3%	1%	1%	2%
Preserved fish/seafood	17%	5%	2%	11%	5%	44%	3%
Vegetables	11%	6%	2%	31%	1%	8%	7%

Q: What would be your preferred packaging type for each of the following food and beverage product types? | n=10605 | Filter: None

For over 1 out of 3 European consumers, littering of food containers in the environment is the biggest driver in purchase decision

Littering of food containers as the most important issue when deciding on purchases is significantly higher for consumers in Austria, Czech Republic, Germany, Italy, Slovakia and Switzerland.

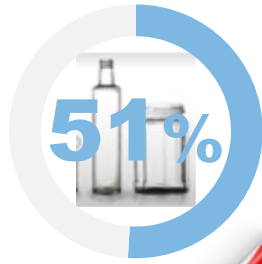


XX% / XX% Significantly higher / lower than EU

Q: Which of these issues related to food & beverage packaging is most important to you when deciding which food products to purchase? | n=10 605 | Filter: None

Of those buying more glass, 2 out of 5 Europeans chose glass over other packaging materials specifically because it can be recycled more

The recyclability of glass packaging and prevention of food contamination are the top reason for choosing glass over other packaging materials in Europe. In Turkey, health safety is high on the agenda as this was the top reason for 56% of Turkish consumers who buy more glass.



buy more glass compared to 3 years ago



56%

Buy more glass because it gives a strong health safety feeling



48%

Buy more glass because it causes less littering into the environment



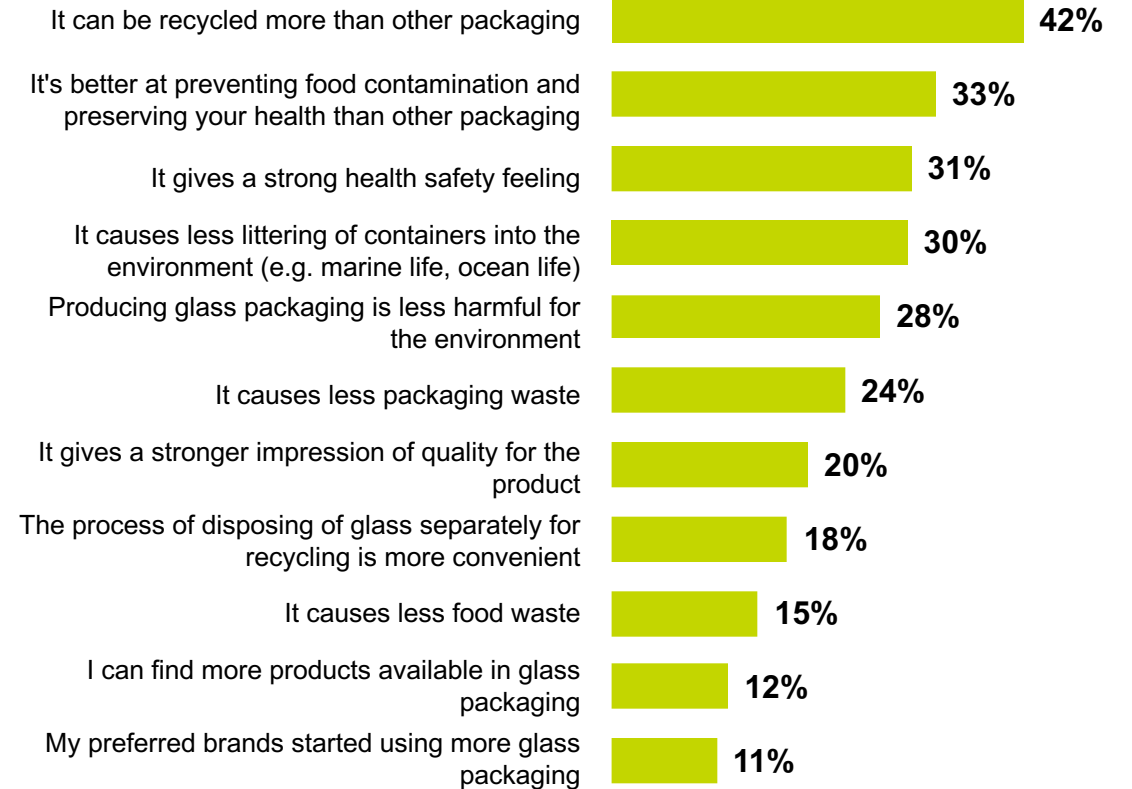
42%

Buy more glass because it better prevents food contamination and better preserves your health

BUY MORE GLASS BECAUSE...



(n=5423)



Q: You indicated buying glass packaging more for food and beverages in comparison to your preferences in the past, which of the following reasons best describe why?

| n=5423 | Filter: If 'buy more' was indicated for glass

2 out of 5 Europeans chose glass over other packaging materials because it can be recycled more

The recyclability of glass packaging and prevention of food contamination are the top reasons for choosing glass over other packaging materials in Europe. In Poland significantly more brands have started using glass packaging and glass has also become more available in the UK.

BUY MORE GLASS BECAUSE...

	EU	Austria	Croatia	Czechia	France	Germany	Italy	Poland	Portugal	Slovakia	Spain	Switzerland	Turkey	UK
	(n=5423)	(n=365)	(n=325)	(n=245)	(n=424)	(n=480)	(n=478)	(n=577)	(n=563)	(n=302)	(n=539)	(n=267)	(n=540)	(n=318)
% OF CONSUMERS WHO BUY MORE GLASS	51%	61%	54%	41%	42%	48%	48%	58%	56%	50%	54%	45%	90%	32%
It can be recycled more than other packaging	42%	39% ²	36% ²	43% ¹	47% ¹	36%	42% ¹	38% ¹	54% ¹	37% ²	49% ¹	43% ¹	29%	57% ¹
It's better at preventing food contamination and preserving your health than other packaging	33%	24%	42% ¹	32%	27%	26%	31%	38% ¹	43%	37% ²	30%	30%	44% ²	21%
It gives a strong health safety feeling	31%	22%	31%	19%	25%	21%	34% ²	44%	27%	46% ¹	22%	25%	56% ¹	15%
It causes less littering of containers into the environment (e.g. marine life, ocean life)	30%	48% ¹	25%	34% ²	23%	40% ¹	19%	21%	49% ²	25%	31%	36% ²	20%	27%
Producing glass packaging is less harmful for the environment	28%	21%	31%	34% ²	30%	24%	31%	36%	8%	29%	33% ²	20%	35%	28% ²
It causes less packaging waste	24%	34%	25%	23%	30%	37% ²	18%	12%	27%	19%	18%	33%	20%	24%
It gives a stronger impression of quality for the product	20%	15%	31%	29%	15%	12%	28%	21%	22%	25%	14%	15%	26%	14%
The process of disposing of glass separately for recycling is more convenient	18%	21%	24%	7%	33% ²	16%	21%	5%	6%	23%	31%	32%	8%	22%
It causes less food waste	15%	14%	19%	20%	13%	15%	16%	19%	14%	17%	12%	14%	15%	13%
I can find more products available in glass packaging	12%	14%	7%	9%	9%	13%	9%	23%	11%	8%	9%	9%	12%	17%
My preferred brands started using more glass packaging	11%	14%	7%	10%	11%	11%	11%	14%	12%	5%	10%	6%	12%	12%

Q: You indicated buying glass packaging more for food and beverages in comparison to your preferences in the past, which of the following reasons best describe why?

| n=5423 | Filter: If 'buy more' was indicated for glass

XX% / XX% Significantly higher / lower than EU

46% of Europeans decreased their consumption of plastic to prevent more littering in the environment

The majority of Europeans are decreasing their purchases of plastic packaging; this mostly because it causes more littering & is more harmful to the environment. In Switzerland, 52% of people who reduced their plastic packaging believe it causes more packaging waste. In Turkey, consumers are mostly concerned about the lower health safety feeling of plastic.



buy less plastic compared to 3 years ago



54%

Buy less plastic because it is more harmful for the environment



52%

Buy less plastic because it causes more packaging waste



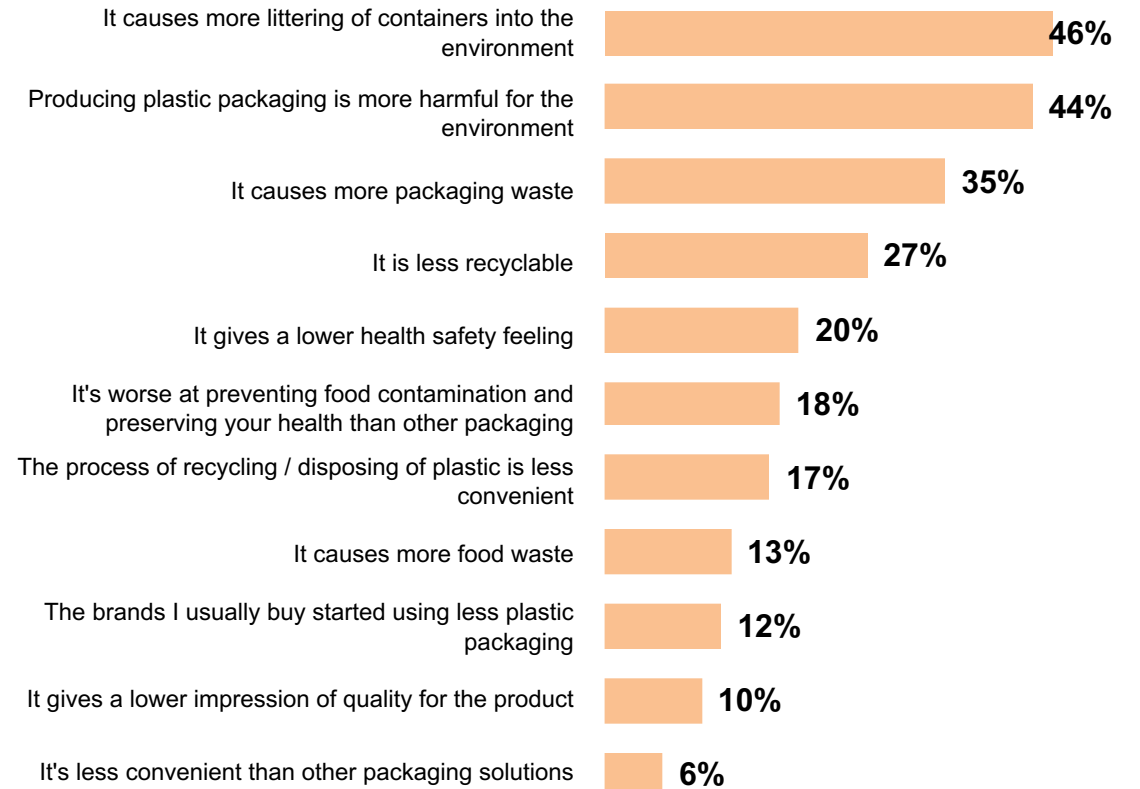
51%

Buy less plastic because it gives a lower health safety feeling

BUY LESS PLASTIC BECAUSE...



(n=5423)



Q: You indicated buying glass packaging more for food and beverages in comparison to your preferences in the past, which of the following reasons best describe why?

| n=5423 | Filter: If 'buy more' was indicated for glass

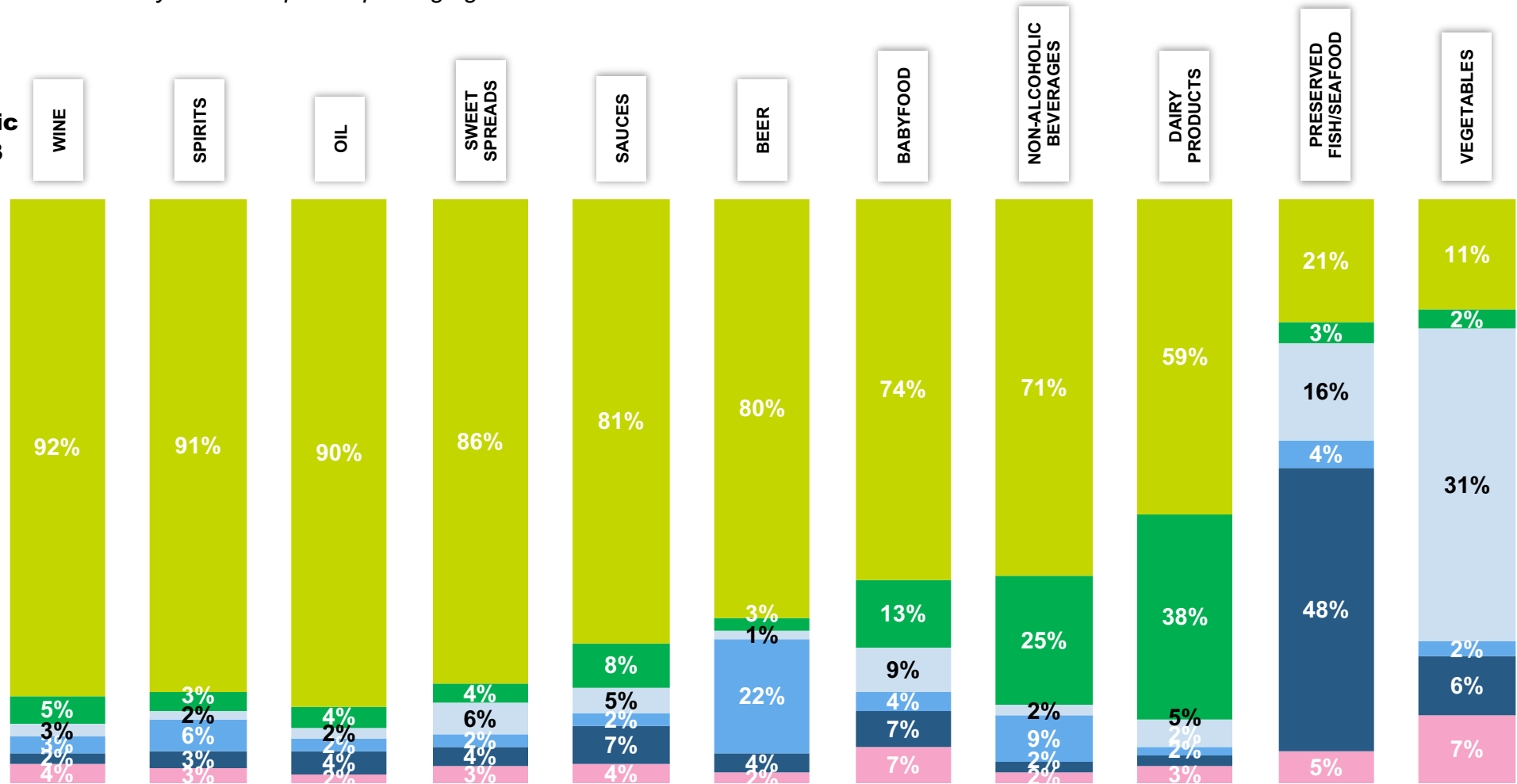
Europeans are switching most often from plastic packaging to a glass alternative when it comes to their food & beverage purchases

9 out of 10 consumers who have lowered their amount of plastic purchased are choosing a glass alternative for wine, spirits and oil. People switched least often to glass packaging when buying preserved fish/seafood and vegetables. Almost half buy preserved fish & seafood in metal tins instead, while 1 in 3 buy their vegetables in carton boxes & trays to avoid plastic packaging.

BUY ... INSTEAD OF PLASTIC

57%














































buy less plastic compared to 3 years ago



Q: For each product you indicated buying less in plastic packaging, in which packaging are you now buying them? | n=6020 | Filter: If 'buying less' was indicated for plastic

9 out of 10 Europeans who buy less oil, wine and spirits in plastic packaging switched to a glass alternative

For the majority of food & beverage products people switched to glass packaging as an alternative for plastic. In the UK people chose beverage cans over plastic when buying beer. Consumers in Croatia, Portugal and Spain chose beverage cartons over plastic packaging for their dairy products.

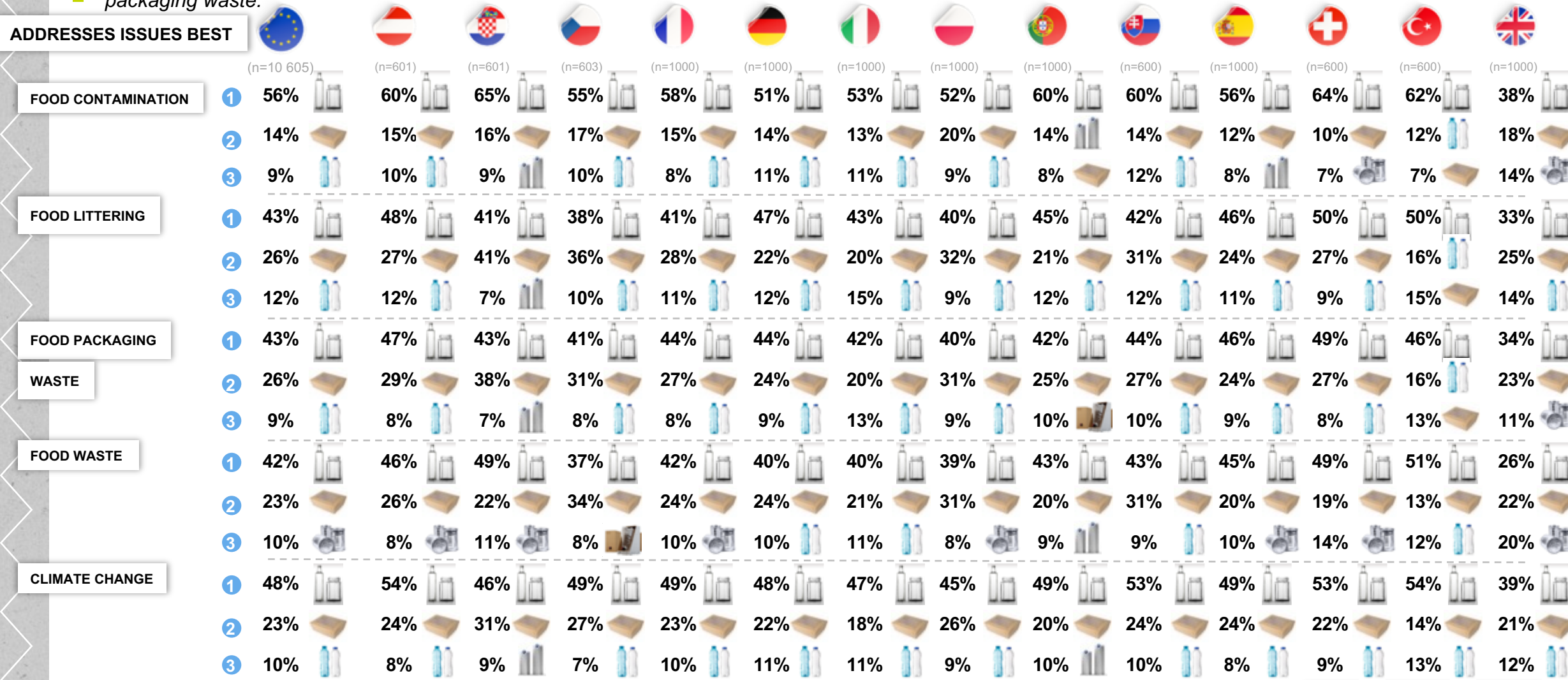
CURRENT PACKAGING	 (n=6020)	 (n=353)	 (n=324)	 (n=304)	 (n=544)	 (n=472)	 (n=524)	 (n=682)	 (n=668)	 (n=355)	 (n=618)	 (n=267)	 (n=457)	 (n=454)
WINE	92%	95%	98%	97%	89%	92%	88%	89%	92%	95%	90%	93%	96%	72%
SPIRITS	91%	94%	95%	90%	90%	87%	96%	94%	76%	96%	95%	100%	92%	81%
OIL	90%	91%	92%	89%	93%	93%	50%	62%	98%	86%	88%	87%	88%	81%
SWEET SPREADS	86%	94%	95%	84%	87%	84%	89%	89%	72%	87%	80%	92%	88%	80%
SAUCES	81%	87%	77%	74%	78%	78%	80%	78%	84%	85%	81%	75%	80%	83%
BEER	80%	86%	83%	83%	78%	81%	84%	89%	84%	67%	75%	81%	83%	45% 
BABYFOOD	74%	80%	70%	81%	58%	41%	66%	74%	59%	83%	68%	79%	87%	57%
NON-ALCOHOLIC BEVERAGES	71%	84%	71%	46%	70%	88%	76%	77%	65%	58%	69%	72%	84%	53%
DAIRY PRODUCTS	59%	78%	72% 	75%	60%	76%	54%	50%	60% 	69%	51% 	53%	79%	40%
PRESERVED FISH/SEAFOOD	48% 	54% 	68% 	94% 	33% 	44% 	43%	52% 	66% 	70% 	33% 	35% 	54% 	49% 
VEGETABLES	31% 	46% 	32% 	25% 	21% 	26% 	43% 	30% 	28% 	21% 	36% 	32% 	40% 	20% 

NOTE: Current packaging is glass, unless specified otherwise

Q: For each product you indicated buying less in plastic packaging, in which packaging are you now buying them? | n=6020 | Filter: If 'buying less' was indicated for plastic

Almost half of Europeans think glass is the best packaging solution to fight climate change

Glass is by far considered the best packaging solution as all 13 countries believe glass best addresses food-related environmental issues and climate change. Carton boxes and food trays come in second place, except for Turkey where plastic is believed to best prevent food contamination, food littering & food packaging waste.



Q: Which of the following packaging solutions do you think best addresses each of these issues? | n=10 605 | Filter: None



separate
COLLECTION &
DISPOSAL



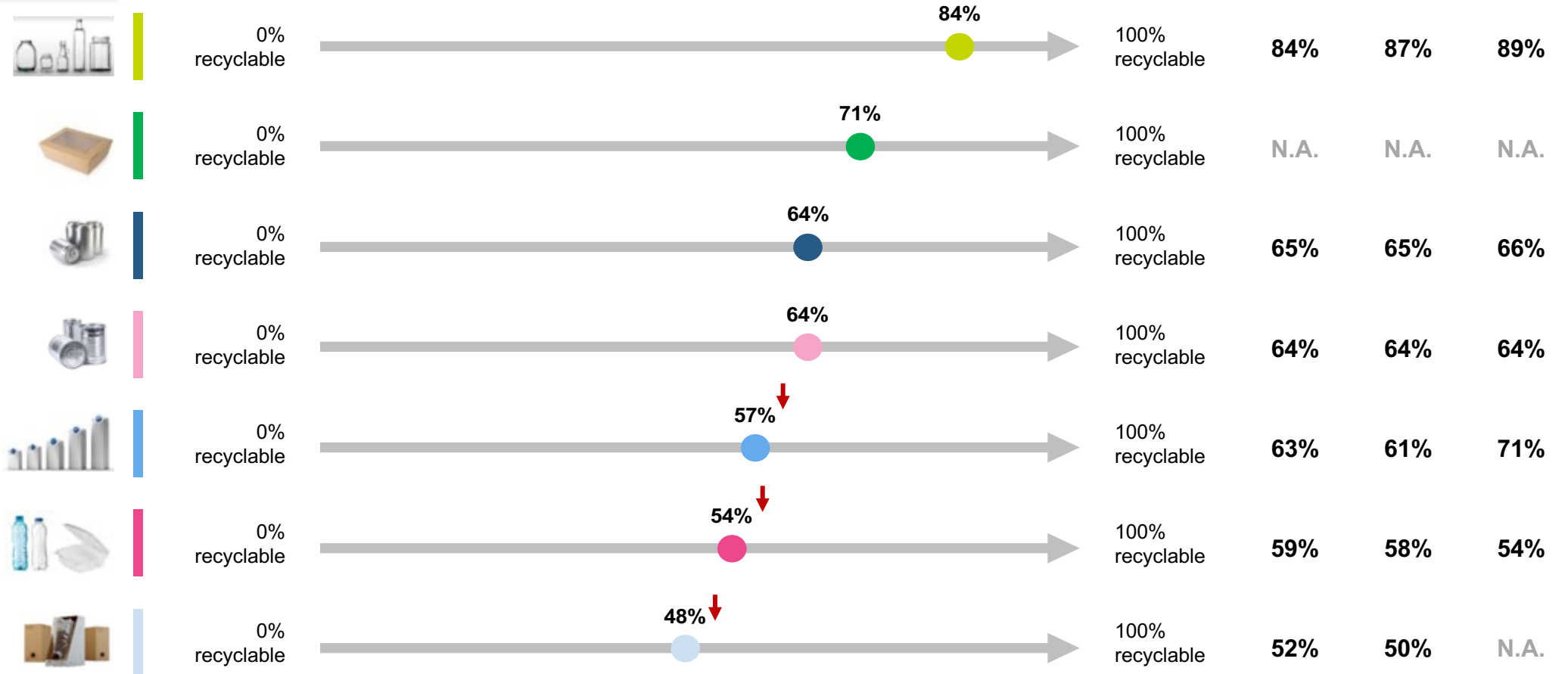


On average European consumers think 84% of all glass packaging is recyclable

Beverage cartons, plastic and bag in a box are perceived less recyclable than in previous years, with bag in a box being considered the least recyclable packaging material of all.

PERCEPTION OF RECYCABILITY

OF PACKAGING MATERIALS



Note: The packaging 'carton boxes and food trays' was newly added in 2019. This might affect comparability with previous waves.

↑↓ Significant increase/decrease compared to 2016

Q: How recyclable do you think the following packaging materials are? | n=10 605 | Filter: None



Europeans are collecting more packaging materials than before for recycling

All packaging materials saw an increase in separate collection for recycling purposes compared to 2010. Glass is most often separately collected with 84% of Europeans doing this. Bag in a box is the least often separately collected with 62%.

SEPARATE
COLLECTION



0% separate collection



84% ↑

100% separate collection

2010

82%



0% separate collection



78% ↑

100% separate collection

64%



0% separate collection



74%

100% separate collection

N.A.



0% separate collection



72% ↑

100% separate collection

57%



0% separate collection



71% ↑

100% separate collection

60%



0% separate collection



71% ↑

100% separate collection

56%



0% separate collection



62%

100% separate collection

N.A.

Note: The packaging 'carton boxes and food trays' was newly added in 2019. This might affect comparability with previous waves.

↑↓ Significant increase/decrease compared to 2010

Q: What proportion of the following packaging materials do you currently collect separately for recycling purposes? | n=10 605 | Filter: None

In Europe, clear and coloured glass are most often collected together for recycling purposes

In Austria, clear glass and mixed coloured glass are most often collected in 2 separate categories. In Germany and Switzerland, glass is most often collected in 3 separate categories: clear, green and amber glass.

SEPARATE COLLECTION OF GLASS

IN YOUR CITY



(n=10 217)



(n=579)



(n=590)



(n=579)



(n=961)



(n=955)



(n=976)



(n=972)



(n=977)



(n=576)



(n=970)



(n=571)



(n=586)



(n=925)

Collection Method	EU	Austria	Croatia	Czechia	France	Germany	Italy	Poland	Portugal	Slovakia	Spain	Switzerland	Turkey	United Kingdom
Clear and mixed coloured glass are collected separately (all together)	39%	18% ²	54% ¹	39% ²	37% ¹	9%	48% ¹	57% ¹	50% ¹	64% ¹	54% ¹	13% ²	26% ¹	23% ²
Glass is collected in 3 separate categories - one for clear glass, one for green glass and one for amber glass	16%	9%	3%	6%	6%	65% ¹	4%	8%	4%	5%	6%	67% ¹	19%	9%
Glass is collected in 2 separate categories - one for clear glass and one for mixed colour glass	15%	66% ¹	6%	41% ¹	8%	14% ²	5%	16% ²	6%	11% ²	7%	9%	20% ²	7%
Glass is collected together with metal	11%	2%	13% ²	3%	8%	4%	30% ²	8%	9% ²	7%	6%	2%	13%	34% ¹
Only clear glass is collected separately	7%	2%	5%	5%	15% ²	3%	9%	6%	6%	5%	12% ²	3%	14%	6%
Other	4%	1%	6%	1%	8%	0%	1%	1%	6%	1%	6%	2%	2%	7%

XX% / XX% Significantly higher / lower than EU

Q: How does your city (municipality) separate glass collection for recycling purposes? | n=10 217 | Filter: If they buy glass packaging

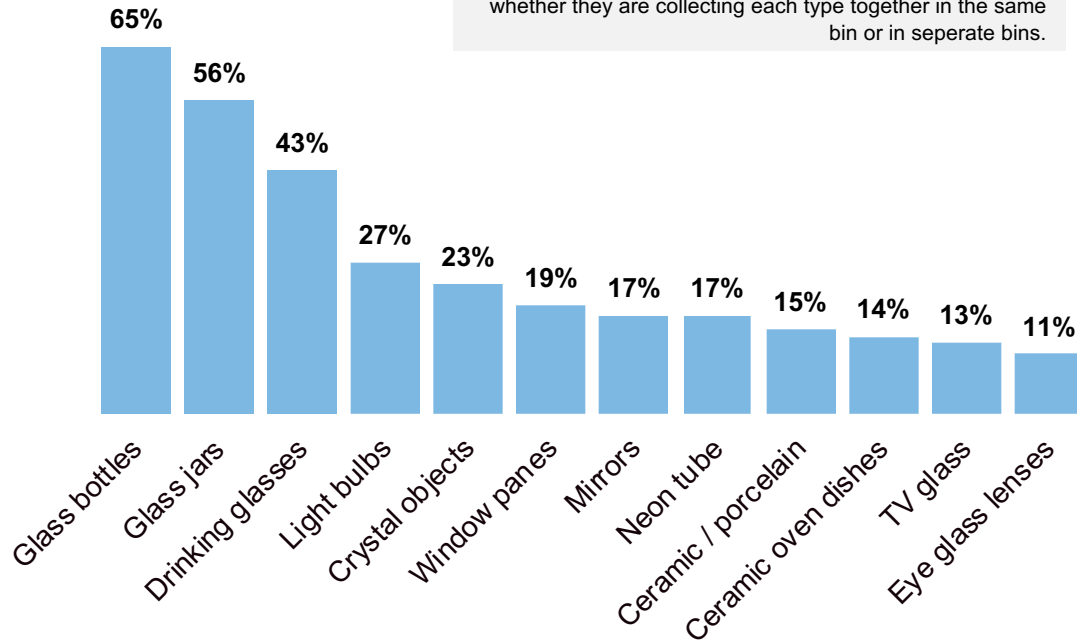


3 out of 4 European consumers take off corks, caps & lids when collecting glass for recycling purposes

OBJECTS SEPARATELY COLLECTED

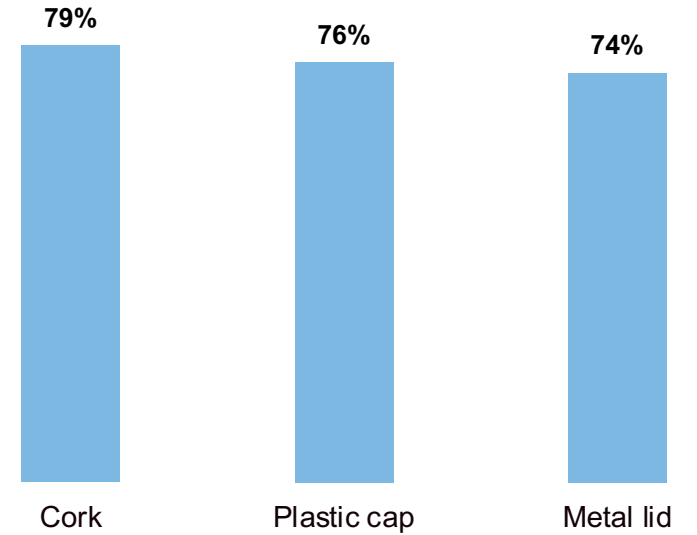
FOR RECYCLING OF GLASS

The below graph represents the consumers who separately collect each glass type. However, there is no measure of whether they are collecting each type together in the same bin or in separate bins.



TAKE OFF... & COLLECT

SEPARATELY FROM GLASS



Q: Which of the following products do you place in the separate collection of glass for recycling purposes?
| n=10 605 | Filter: None

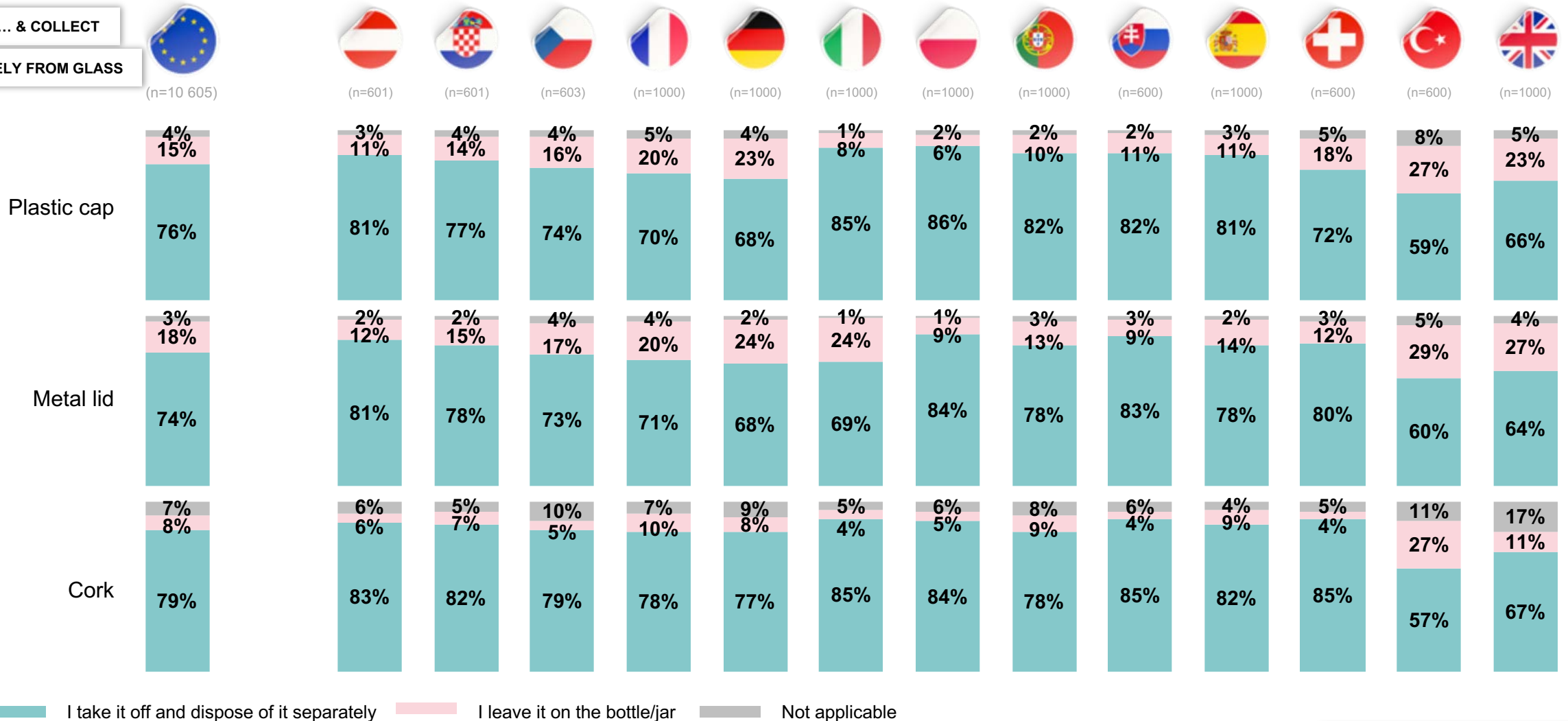
Q: When placing glass bottles or jars in the separate collection of glass, what do you do with the lid/cap?
| n=10 605 | Filter: None

8 out of 10 Europeans correctly dispose caps and lids separately from glass

The majority dispose caps and lids correctly and collect them separately from glass. Metal lids are most often left on glass packaging, with 1 in 5 doing this.

TAKE OFF... & COLLECT

SEPERATELY FROM GLASS



I take it off and dispose of it separately I leave it on the bottle/jar Not applicable

Q: When placing glass bottles or jars in the separate collection of glass, what do you do with the lid/cap? | n=10 605 | Filter: None



Around half of those who recycle their glass use a bottle bank

Just under half of European citizens who recycle put their glass in a local bottle bank or tip. This is also perceived as the most convenient method to dispose of glass, followed by local kerbside collection.

SEPARATE COLLECTION

METHOD USED

47% goes to their local bottle bank

34% reuses glass at home

29% puts glass in local kerbside collections

25% returns their bottles to retailer

16% puts glass into public waste bin

8% puts glass into general waste bin at home



MOST CONVENIENT METHOD

35% local bottle bank

21% local kerbside collection

15% reuse glass containers at home

12% returning bottles to retailer

11% public waste bin

4% general waste bin at home

n=10 030

Taking used glass to a local bottle bank is considered the most convenient disposal method across Europe

A local bottle bank and local kerbside collections are considered the most convenient disposal methods for glass in Europe. The disposal method people are currently using is most often also seen as the most convenient one.

MOST CONVENIENT METHOD	EU (n=10 030)	Austria (n=573)	Croatia (n=583)	Czechia (n=568)	France (n=922)	Germany (n=939)	Italy (n=973)	Poland (n=964)	Portugal (n=960)	Slovakia (n=570)	Spain (n=957)	Switzerland (n=553)	Turkey (n=569)	UK (n=898)
Taking used glass containers to a local bottle bank or tip	35%	48%	31%	39%	59%	46%	33%	40%	18%	10%	14%	65%	37%	27%
Putting used glass containers into the local kerbside collections	21%	24%	8%	8%	19%	22%	35%	10%	30%	22%	10%	14%	22%	42%
Saving used glass containers for reuse at home or elsewhere	15%	16%	23%	13%	7%	12%	11%	16%	20%	20%	20%	11%	18%	13%
Returning bottles to a retailer	12%	5%	29%	31%	3%	10%	5%	21%	10%	38%	5%	5%	11%	5%
Putting used glass containers into a public waste bin	11%	3%	4%	5%	7%	4%	11%	8%	18%	6%	48%	3%	5%	5%
Putting used glass containers into the general waste bin at home	4%	3%	4%	2%	4%	5%	6%	5%	3%	3%	3%	2%	6%	9%
None of the above	0%	1%	1%	0%	1%	1%	0%	0%	1%	0%	0%	1%	0%	0%

XX% / XX% Significantly higher / lower than EU

Q: Which of the methods you use do you find the most convenient to dispose your used glass packaging? | n=10 030 | Filter: If they buy glass and recycle some of it