

The fifth annual

European Consumer Packaging Perceptions Study 2025

The importance of packaging sustainability on consumer purchasing decisions



PRO CARTON

Creating a sustainable future through circular packaging



PRO CARTON

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Pro Carton is the association of European cartonboard and carton manufacturers. For further information, please visit www.procarton.com

The study, conducted independently for Pro Carton by Perspectus Global, surveyed 5,072 adults across five countries – Germany, France, Italy, Spain and the United Kingdom.

The research was designed to gauge European consumers’ views on different packaging and environmental issues.

Due to roundings, some of the charts do not add exactly to 100.



perspectus
global

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Forewords



Horst Bittermann
Director General, Pro Carton

Consumers in Europe are facing complex challenges that we haven’t seen since the Second World War. Economic uncertainty, a war in Europe and drastic geopolitical tensions weigh heavily on the minds of Europeans and have also arrived in their daily lives, yet amidst these anxieties, a deep commitment to sustainability shines through.

More than ever, consumers understand that economic stability and environmental wellbeing need to go hand in hand. This is reflected in their continued demand for sustainable products and packaging, even as they navigate the pressures of a cost-of-living and energy crisis.

The 2025 results reveal a growing desire for transparency and responsibility. Consumers are increasingly considering the environmental impact of their choices, from the materials used in packaging to the ethical practices of brands. This is a unique opportunity for the cartonboard and folding carton industry to clearly communicate its pioneering role in sustainability and the circular economy and to reinforce it with strong commitment.

At Pro Carton, we believe that collaboration is key to overcoming these challenges and unlocking a more sustainable future. By working together across the value chain, we can develop innovative solutions that are both environmentally and economically viable.

We are convinced that this research will serve as a catalyst for further action and inspire us to push the boundaries of sustainable packaging together with our partners in the value chain in order to be able to transform more product packaging into a true circular economy.



Winfried Muehling
Director of Marketing & Communication, Pro Carton

The 2025 consumer survey reveals a fascinating challenge: a growing awareness of economic constraints coupled with a dedication to environmental responsibility. This presents a unique demand for the packaging industry: how to deliver sustainable solutions that meet both the ecological and economic needs of consumers.

This year’s findings underscore the enduring appeal of cartonboard. Its strong environmental credentials, combined with its versatility and performance, make the material a natural choice for brands looking to align with consumer values. The fact that 89% of respondents favour cartonboard over plastic demonstrates its perceived sustainability. This is another increase of 2 percentage points compared to our 2024 study.

The 2025 study, in line with 2024 findings, highlights the strong level of trust and confidence in the collection and recycling infrastructure in Europe. 84% of consumers in Europe trust that paper and cartonboard packaging will be recycled. The highest value of any other packaging substrate.

However, the survey also highlights areas for improvement. Consumers are increasingly knowledgeable about recycling and demand retailers and brands to provide clear, accessible information on products. They are also becoming more perceptive about excessive packaging and unnecessary waste.

There is a clear call to action for our industry. We must continue to innovate, optimise our processes, and educate consumers about the benefits of cartonboard. By working together, we can ensure that we remain at the front of the sustainable packaging debate, contributing to a healthier planet and a more prosperous future.

Unpacking the report

The cost of living and climate change are the main pain points

The 2025 survey reveals a complex picture of Europeans’ top concerns. While economic pressures loom large, environmental anxieties remain strong.

Two in three (66%) respondents across Europe cite the cost of living as their primary concern, highlighting the impact of economic uncertainty on daily life. This figure jumps to a staggering 79% in the UK, where financial concerns are most pronounced.

Warfare remains another significant worry, with half (49%) of Europeans expressing concern about geopolitical instability. This is particularly evident in Germany (65%) where anxieties surrounding the conflict in Ukraine are heightened, given the high number of

refugees and the proximity between the two countries.

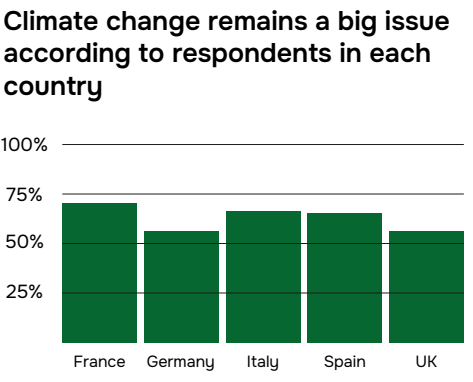
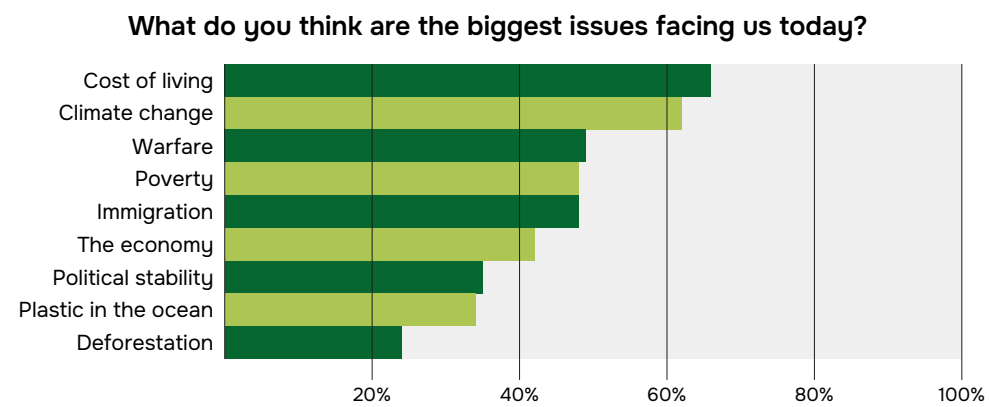
Despite these pressing issues, environmental concerns remain firmly rooted in the public consciousness.

Europeans are worried about climate change, especially in Spain (65%), Italy (66%) and France (70%), demonstrating an exposure to the impact of climate change in Southern Europe. These findings underscore the multifaceted challenges facing Europe today.

While economic pressures are undeniable, environmental concerns persist, highlighting the need for solutions that address both immediate needs and long-term sustainability.

Europeans are worried about climate change, especially those living in Spain, Italy and France.

Two in three respondents across Europe believe that the cost of living is the biggest issue facing us today



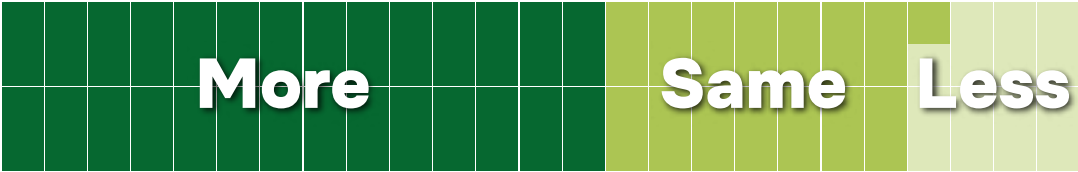
The biggest concerns

The cost of living, warfare and the economy have all increased in importance this year

While economic and political concerns grip Europe, there is a growing wave of apprehension about environmental issues. Despite the pressures of the cost-of-living crisis, Europeans are increasingly worried about the future of the planet.

Climate change remains a pressing concern, with 56% of respondents feeling more anxious about its impact than they were a year ago. This reflects a growing awareness of the urgent need for action to address this global challenge.

56% of Europeans have become more concerned about climate change over the last 12 months



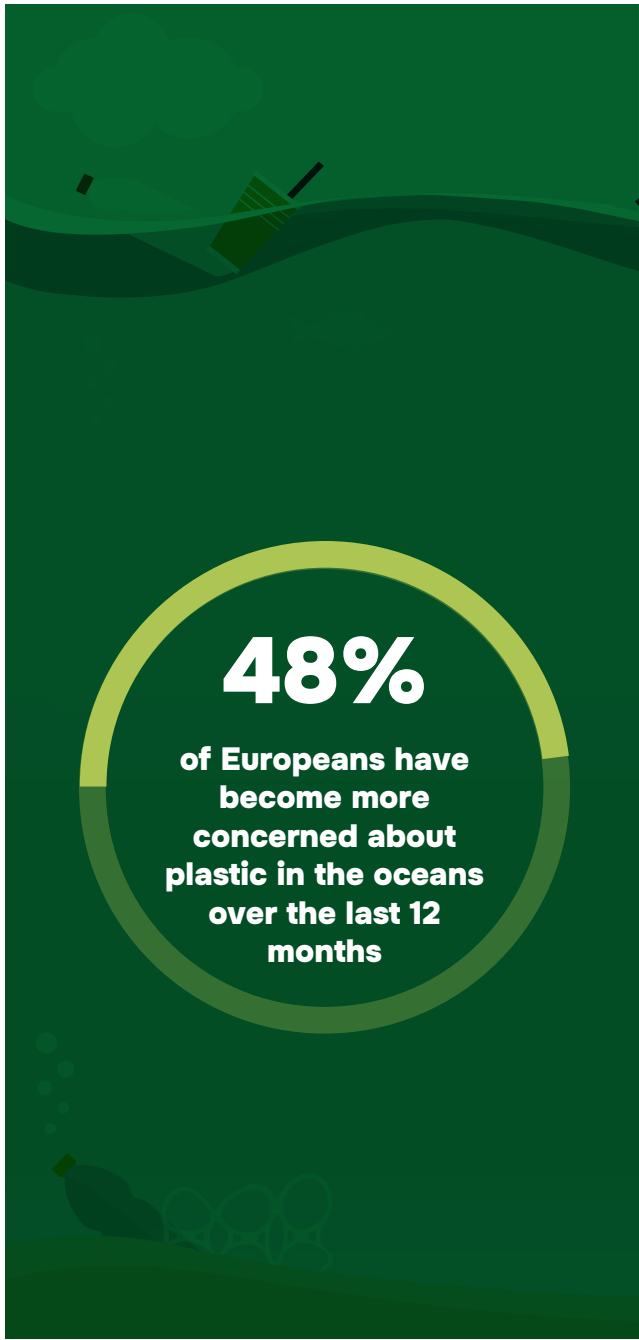
Furthermore, 52% express heightened concern about plastic pollution in our oceans, highlighting a growing understanding of the devastating consequences of plastic waste.

While 77% of respondents report increased worry about the cost of living and 66% about the economy, the environment remains firmly entrenched in the public consciousness.

This unwavering concern for sustainability underscores its enduring importance in the minds of European consumers. It suggests that despite the challenges of the current landscape, environmental awareness is not fading. Instead, it appears to be strengthening, highlighting the growing demand for sustainable solutions and responsible practices.

This resilience of environmental concern presents a powerful opportunity for FMCG brand owners and retailers alike.

By embracing sustainable practices and offering eco-friendly alternatives, they can not only meet the growing demands of conscious consumers but also contribute to a more sustainable future for all.

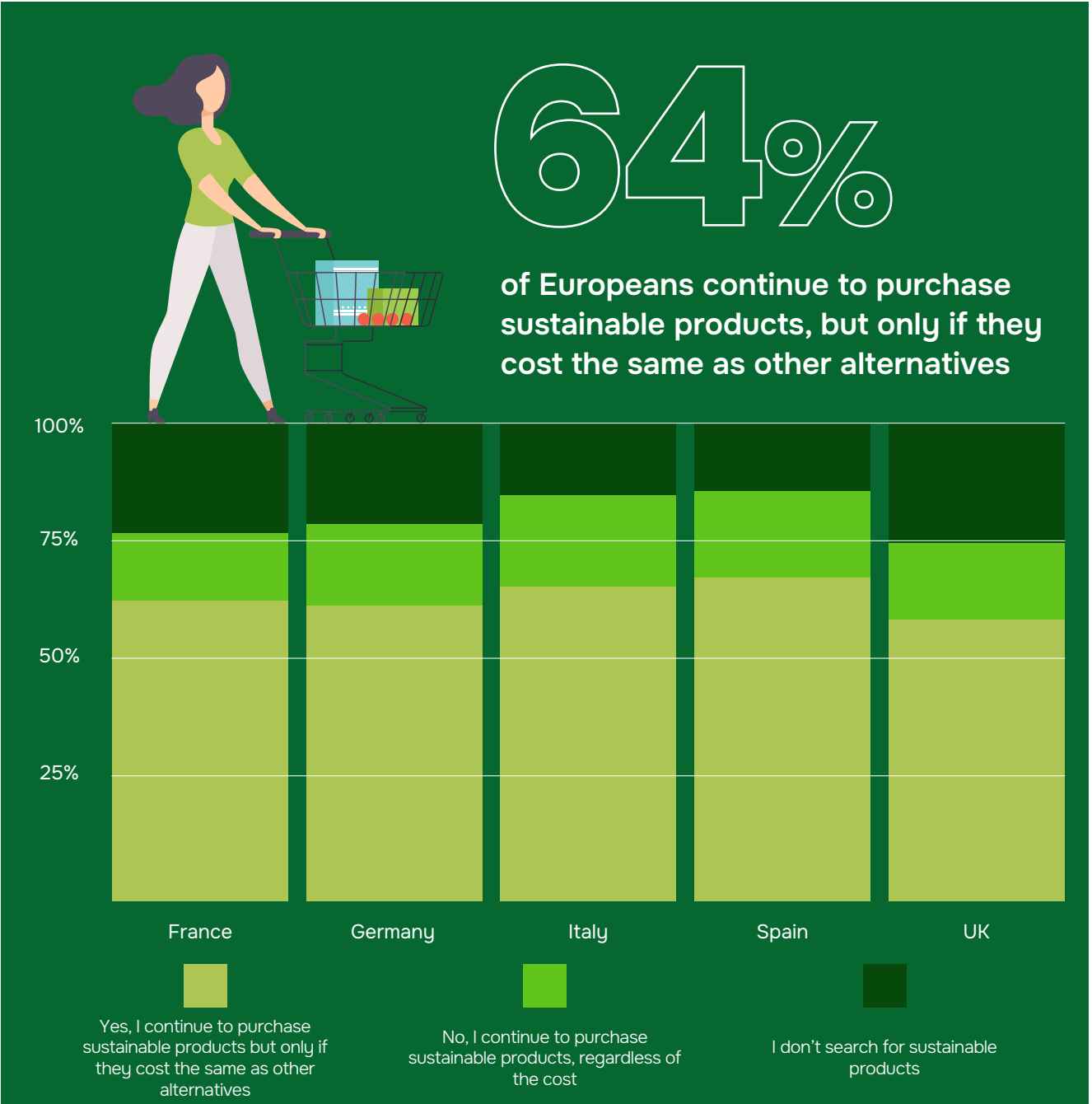
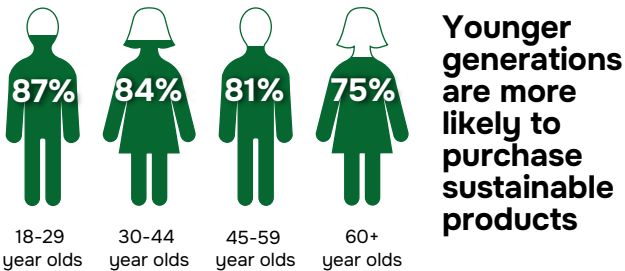


Consumers continue to look for sustainable products despite inflationary impacts

The increased cost of living has undeniably impacted consumer behaviour.

It continues to influence how people prioritise and purchase sustainable products. 64% of European consumers continue to seek out sustainable options, but with a crucial caveat: they must cost the same as a less environmentally friendly alternatives.

This is particularly pronounced in the UK, where economic anxieties are the most acute in Europe. Even in Spain, where concern for climate change is highest, 69% of respondents prioritise affordability when making sustainable choices. This highlights the need for brands to offer options that balance sustainability and affordability.



Sustainability in focus

Spain and Italy lead the way with their eco-conscious living

Sustainability remains a steadfast priority for European consumers.

57% of respondents feel a sustainable lifestyle has become more important in the last 12 months. This commitment to eco-conscious living is particularly strong in Spain (64%) and Italy (65%), highlighting the enduring appeal of sustainability even amidst challenging times.

These findings suggest that for many Europeans, sustainability is not simply a trend, but a deeply held value.



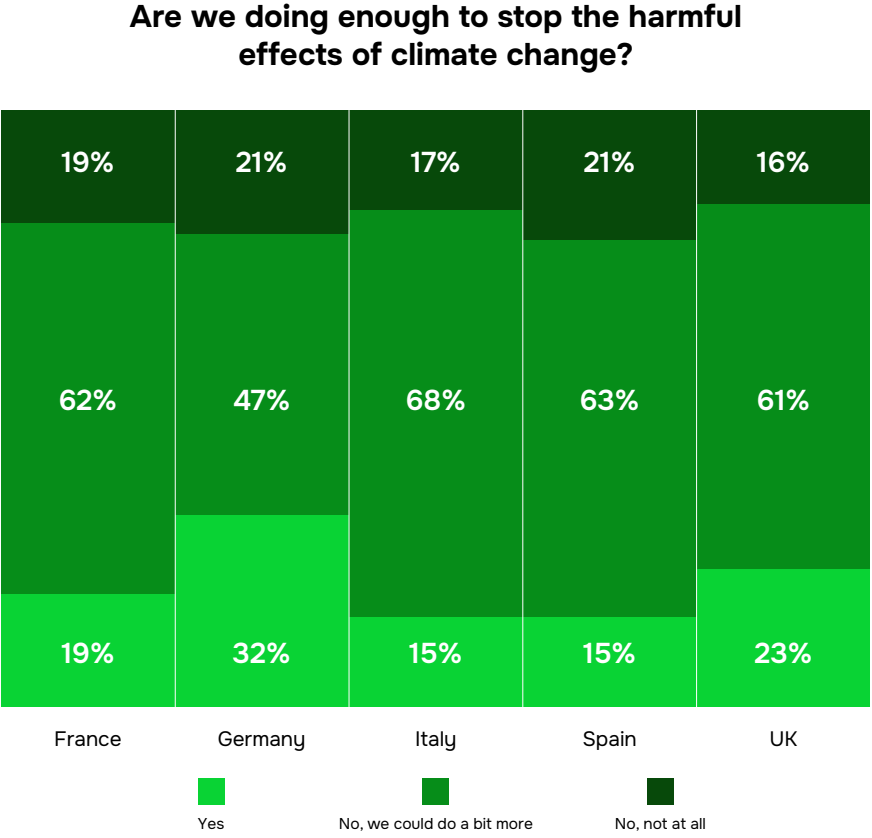
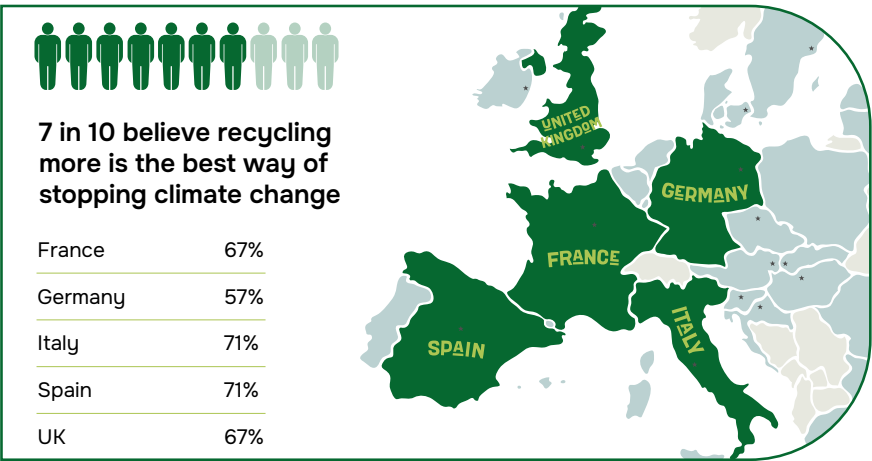
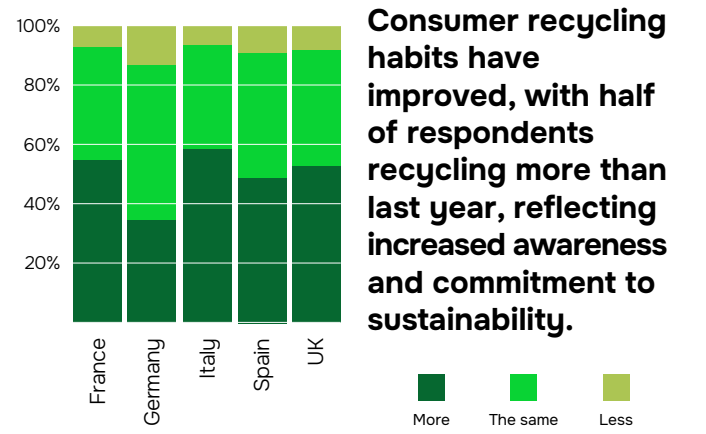
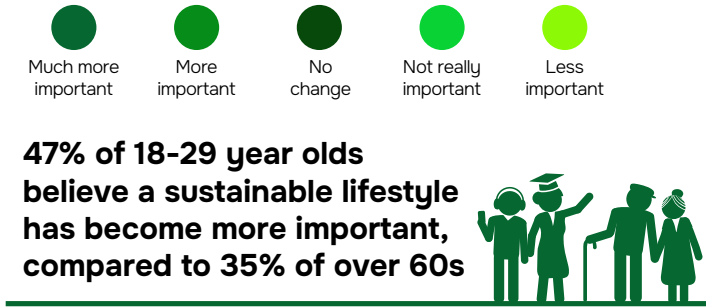
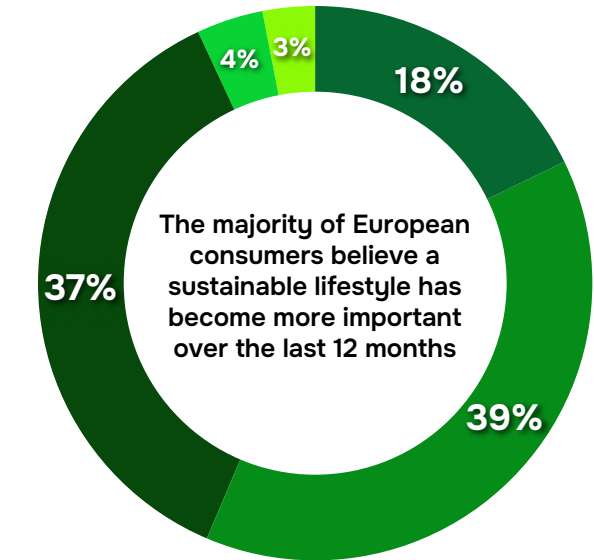
For many Europeans, sustainability is not simply a trend, but a deeply held value.

Which of the following have consumers done over the last twelve months?

European consumers are actively translating their environmental concerns into tangible actions. In the last year, 62% have ramped up their recycling efforts, while 51% have taken steps to reduce water usage. Interestingly, the over 60s age group have increased their recycling, with 70% now reporting to have done so.

A significant number (42%) are opting for regionally sourced products, demonstrating a commitment to reducing their carbon footprint.

Additionally, a yearly pattern has emerged, with consumers continuing to actively decrease their consumption of plastic-packaged products (37% this year), underscoring a proactive shift towards sustainable living across Europe.



European consumers believe that recycling and planting more trees are the best ways to counter climate change

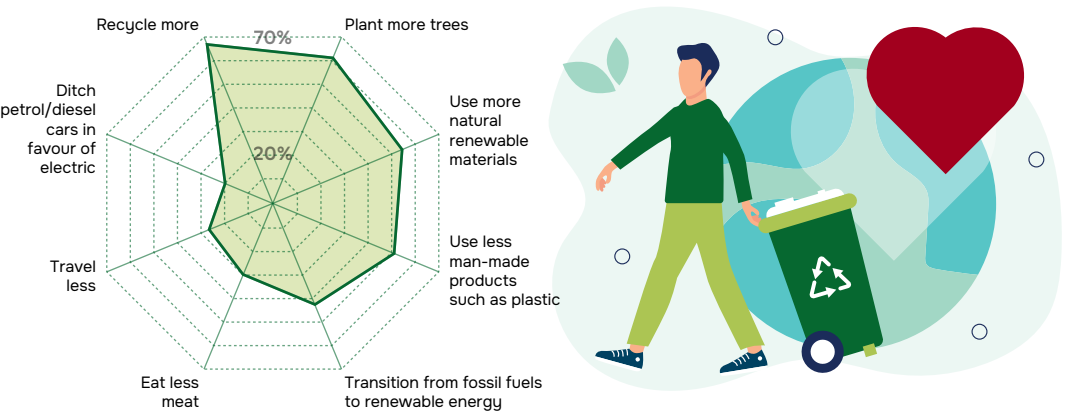
Data shows that climate change is increasingly a concern, as 62% of all consumers responded that it is an increasing worry for them.

Although sustainable practices are becoming ingrained in society – 62% have increased recycling and 38% have made a reduction in plastic packaged purchases – 79% still believe more needs to be done to combat climate change.

32% of consumers in Germany believe we are doing enough to stop the harmful effects of climate change. This is more than double compared to consumers in Spain and Italy (15%).

The majority of respondents (67%) agreed recycling is the most integral practice to reduce climate change, with planting more trees regarded the second most important practice (61%).

Last year’s survey had the surveyed countries unanimously agree that recycling more was the best way to combat climate change, and the consensus is unanimous across all ages.



Packaging in the spotlight

When consumers consider packaging, the survey results highlight that the ease of recyclability is a deciding factor, with 65% valuing it as important.

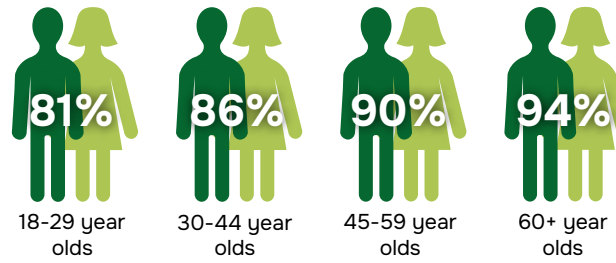
Resealable packaging and renewable natural materials were also highly valued factors, supporting an increase in support for reducing climate impact.

Across all surveyed markets, cartonboard is deemed far more favourable than plastic, with 89% choosing a product if the same option was available in plastic. This is an increase from the previous year's 87%.

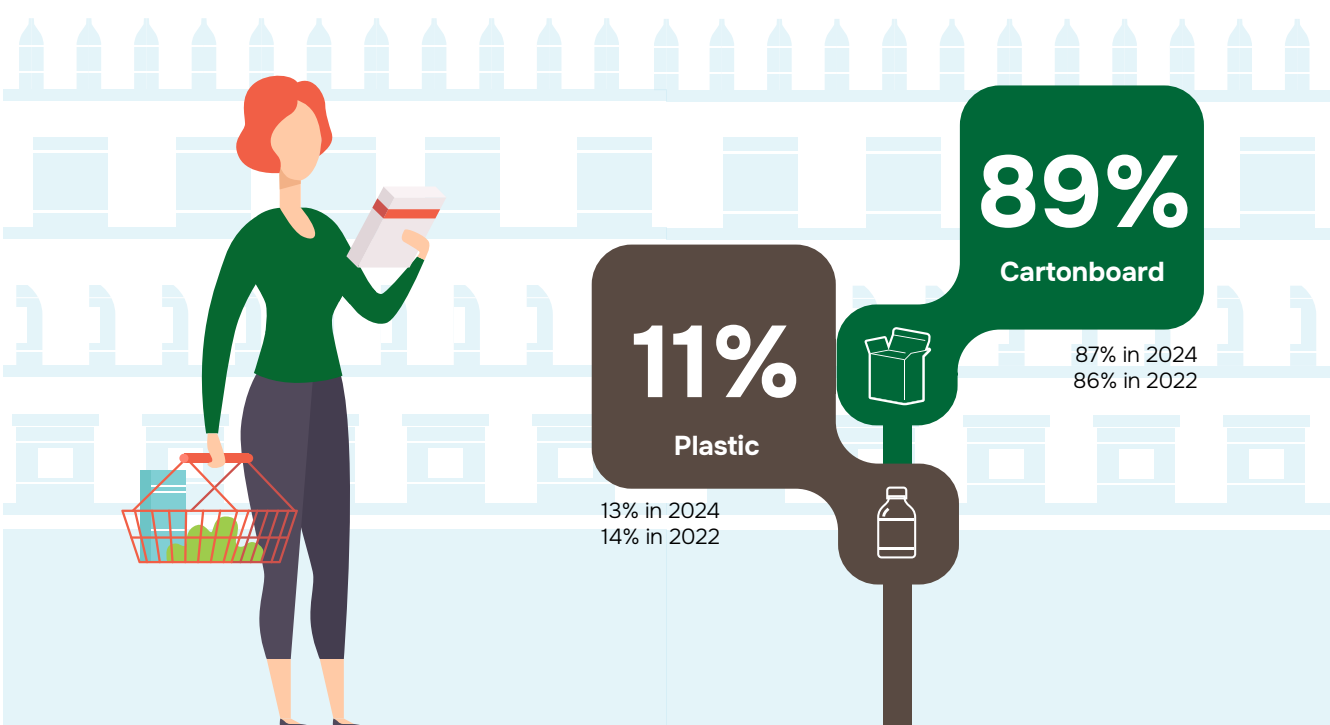
When it comes to reducing packaging waste, 57% think manufacturers have the greatest responsibility to institute that change, 21% say consumers, 14% government and 8% retailers.

Remarkably 27% of consumers in Germany consider themselves responsible, which is far higher than in any other country.

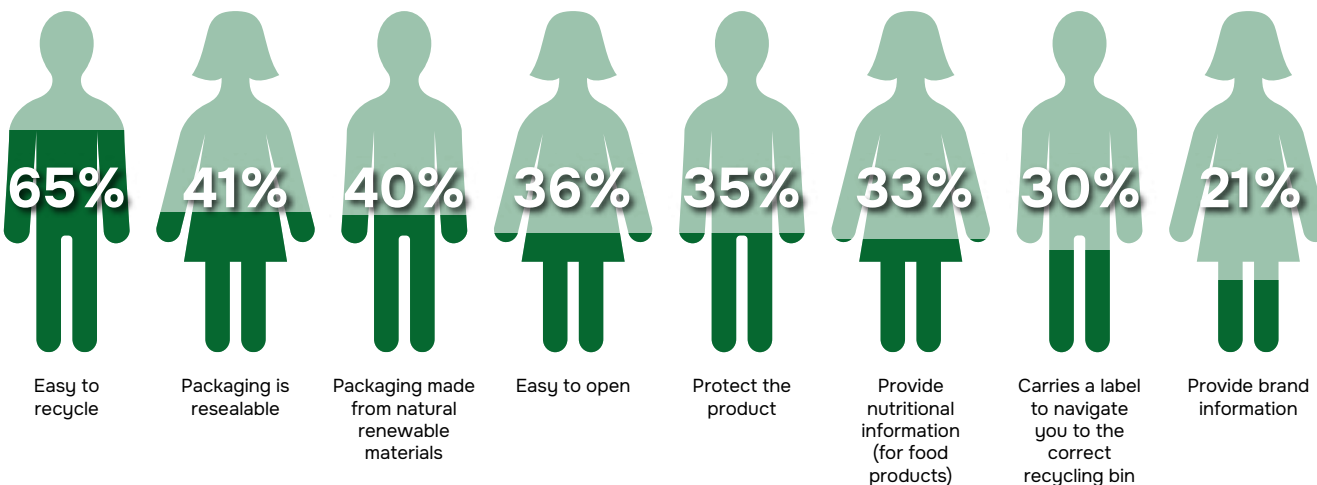
Percentage of consumers that would choose cartonboard over plastic



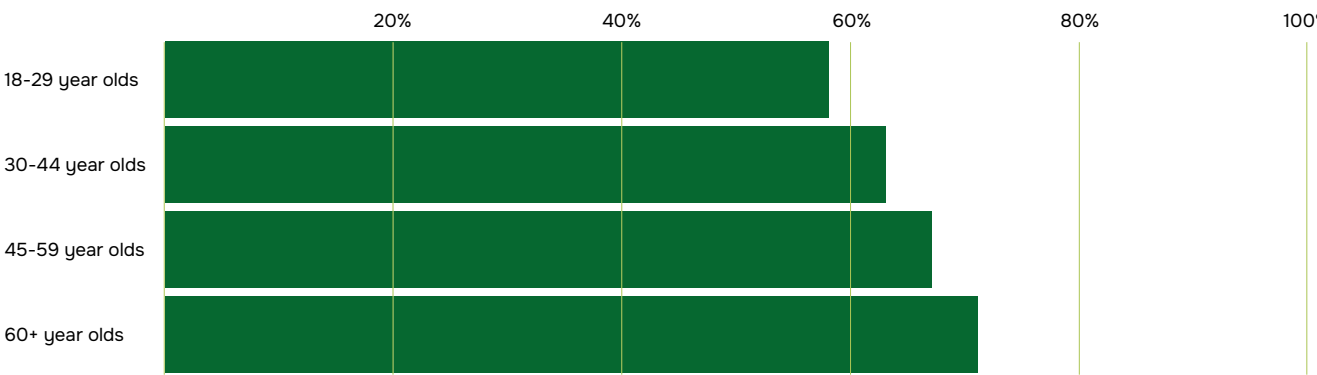
Across Europe, cartonboard continues to be overwhelmingly preferential to plastic packaging, but the younger generation are more open to plastic packaging



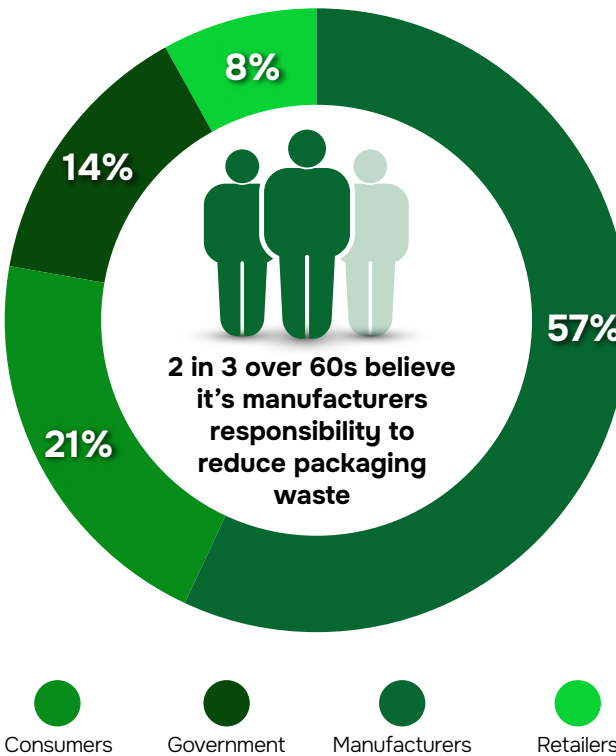
‘Easy to recycle’ remains the most important packaging feature, with ‘resealable’ and ‘made from renewable materials’ also important to consumers



71% of over 60s said that ‘Easy to recycle’ is an important packaging feature when purchasing a product, compared to just 58% of 18-29 year olds



Europeans believe that manufacturers should bear the greatest responsibility for reducing packaging waste



Switching brands

51% of consumers have environmental impact of purchasing decisions in mind when they're at the point of sale

On average, four in ten consumers (40%) across Europe have switched brands or products because of concerns about packaging, with nearly half of all Italian respondents (47%) changing their buying habits. Across the continent, 18-29-year-olds changed their brands the most, with 57% making a change in the last 12 months.

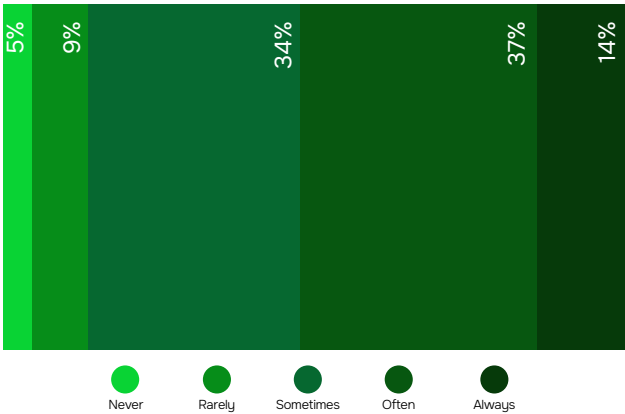
For consumers, non-recyclable packaging was reported as the main reason as to why they are choosing other brands (54%). It was unanimously the greatest reported concern across all surveyed countries, a change from last year's survey, in which only France, Germany and Spain reported it as the biggest issue.

In 2024's survey there was a divide in the reason for switching brands/products, as France, Germany and Spain credited unnecessary packaging as the key influence. This year, European consumers all agreed that the main concern was that brands were using non-

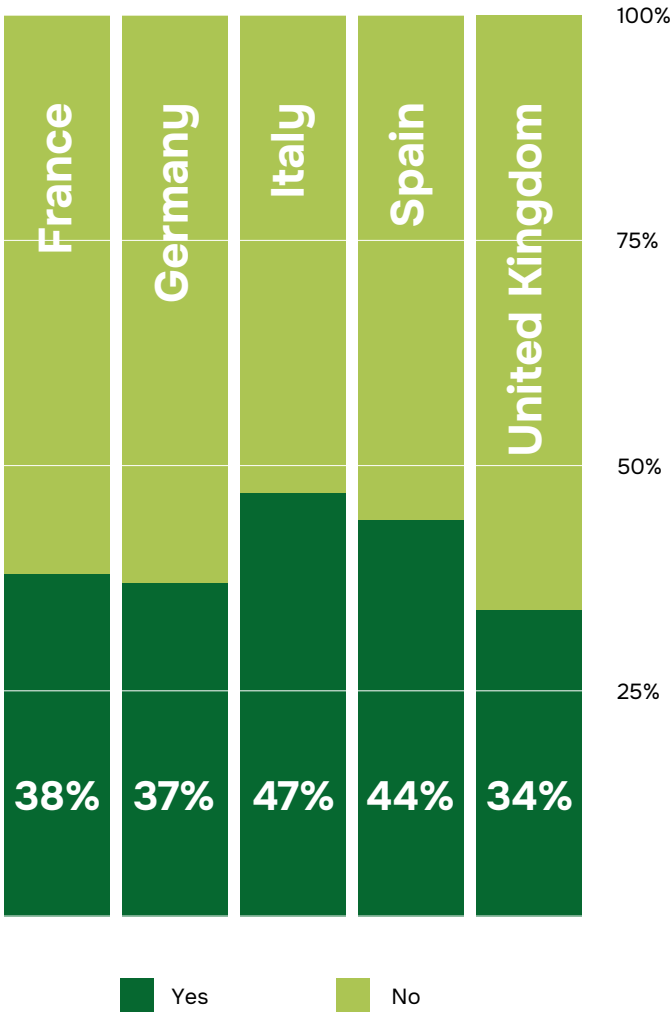
recyclable packaging, demonstrating that the demand for recyclability is growing.

This year was the first time we've asked consumers to what extent they considered the impact on climate change when making purchasing decisions about packaged products. This yielded fascinating insights: more than half (51%) of consumers in Europe already at the point of sale consider the environmental impact of their purchasing decision. Offering sustainable packaging is pivotal for brand-owners to create lasting consumer loyalty.

To what extent do you consider the impact of climate change when making purchasing decisions about packaged products?



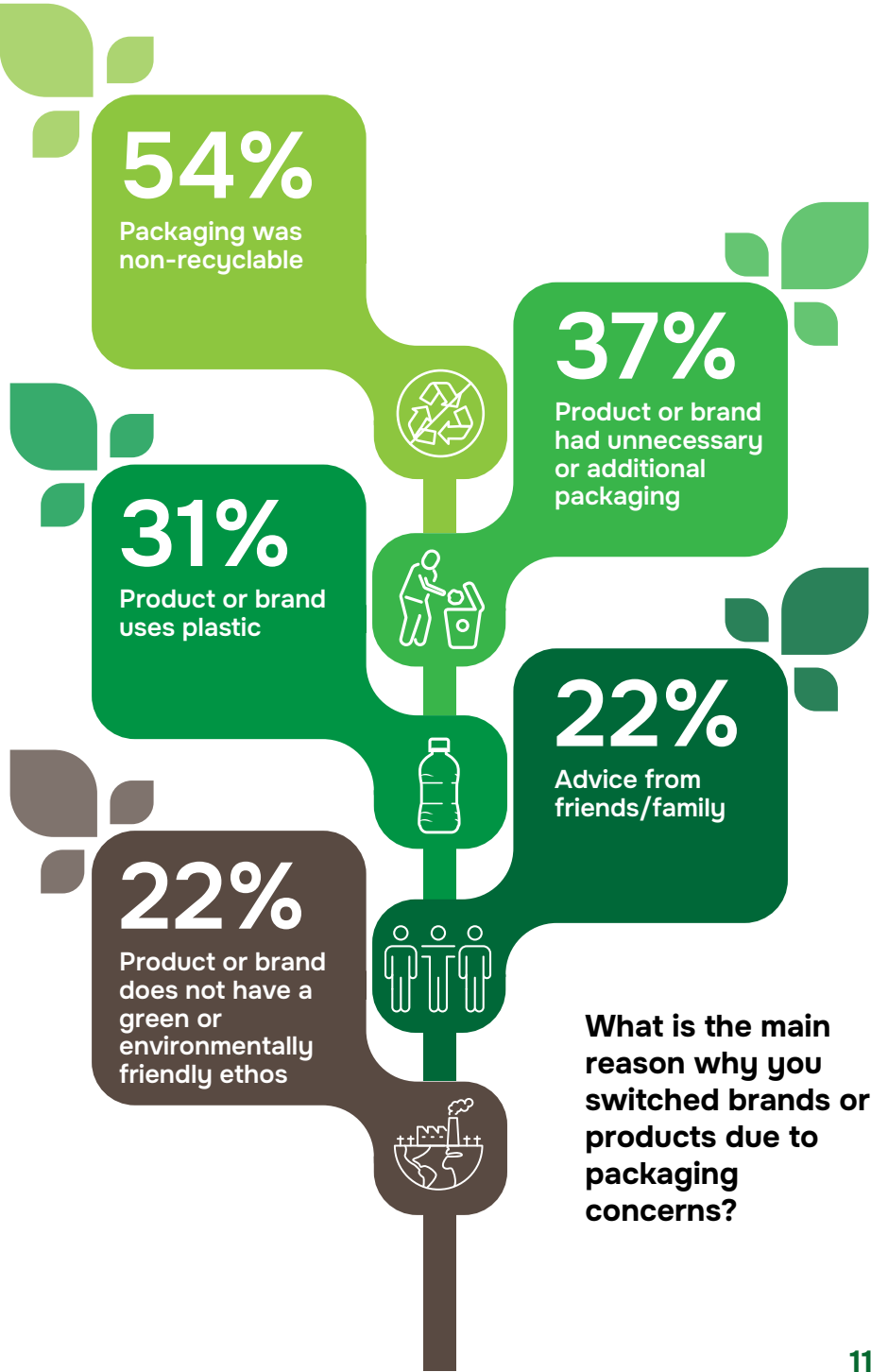
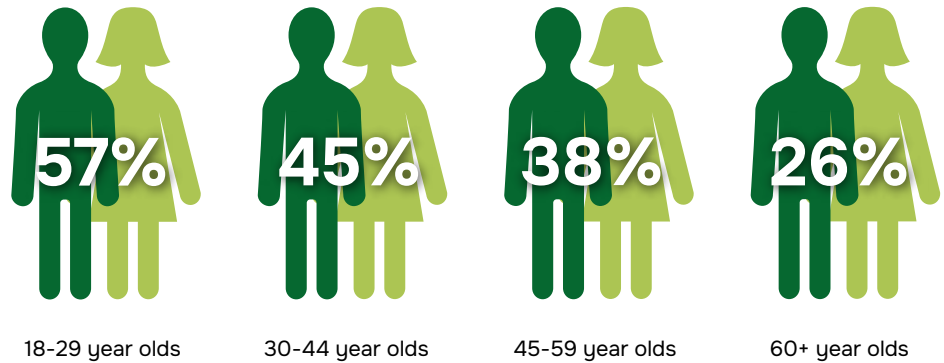
Consumers in Italy are most likely to switch brands because of concerns about the packaging used, followed by those living in Spain. Those in the UK are least likely to make a change.



Overall, 4 in 10 European consumers have switched brands because of concerns about the packaging used.

The main reason for the change is that the packaging used is non-recyclable.

There is a clear divide between generations. Younger age groups are more likely to switch brands, with 57% of 18-29 year olds saying they would make the change.



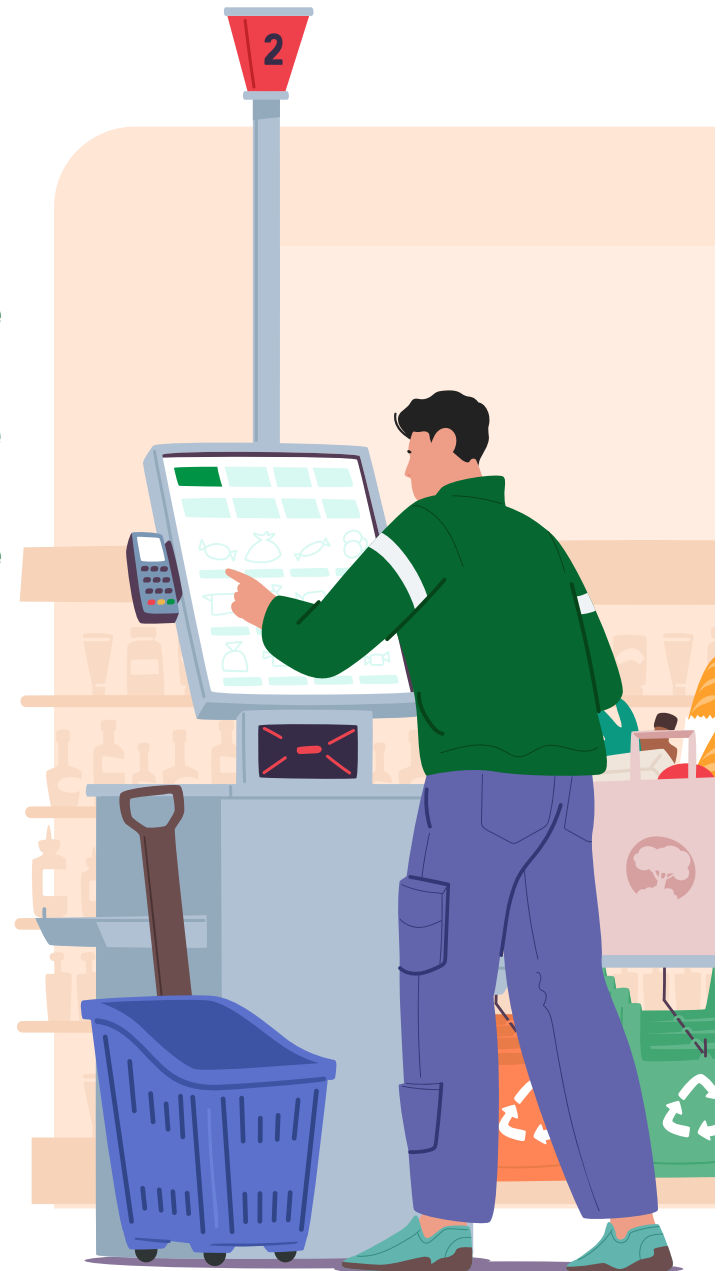
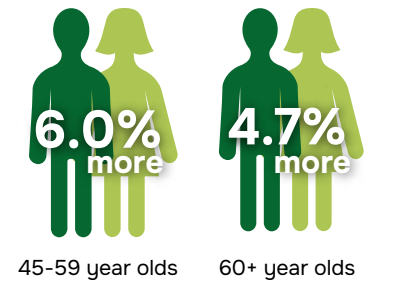
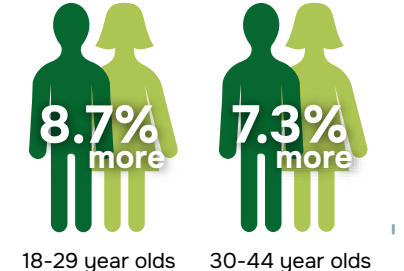
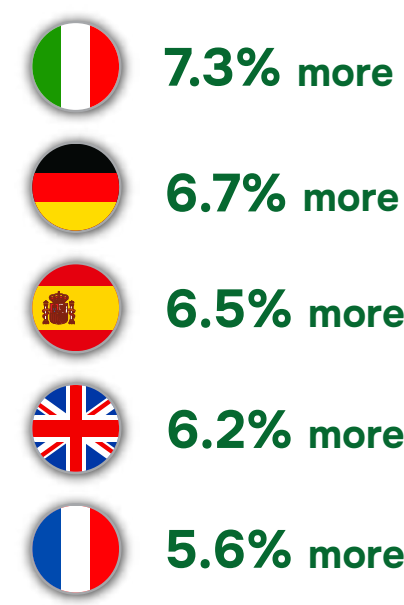
Paying a little more

Italian and German consumers are most likely to spend more for sustainable packaging

The research found 51% of Europeans often or always consider climate change before making a purchase. In Italy and Spain consumers particularly consider this, with 59% and 58% saying they do, respectively.

Typically, the younger generations are more inclined to pay more for environmentally-friendly, sustainable packaging, with 18-24-year-olds paying up to 8.7% more, and this enthusiasm decreasing across the older age categories, with the over 60-year-olds suggesting they'd only pay an additional 4.7%.

Men and women on average both would pay more for products with sustainable packaging, with women slightly more than men with 6.5% more and 6.4% respectively.



Time for action

Using more renewable materials is the best thing that companies or brand owners can do to help the environment

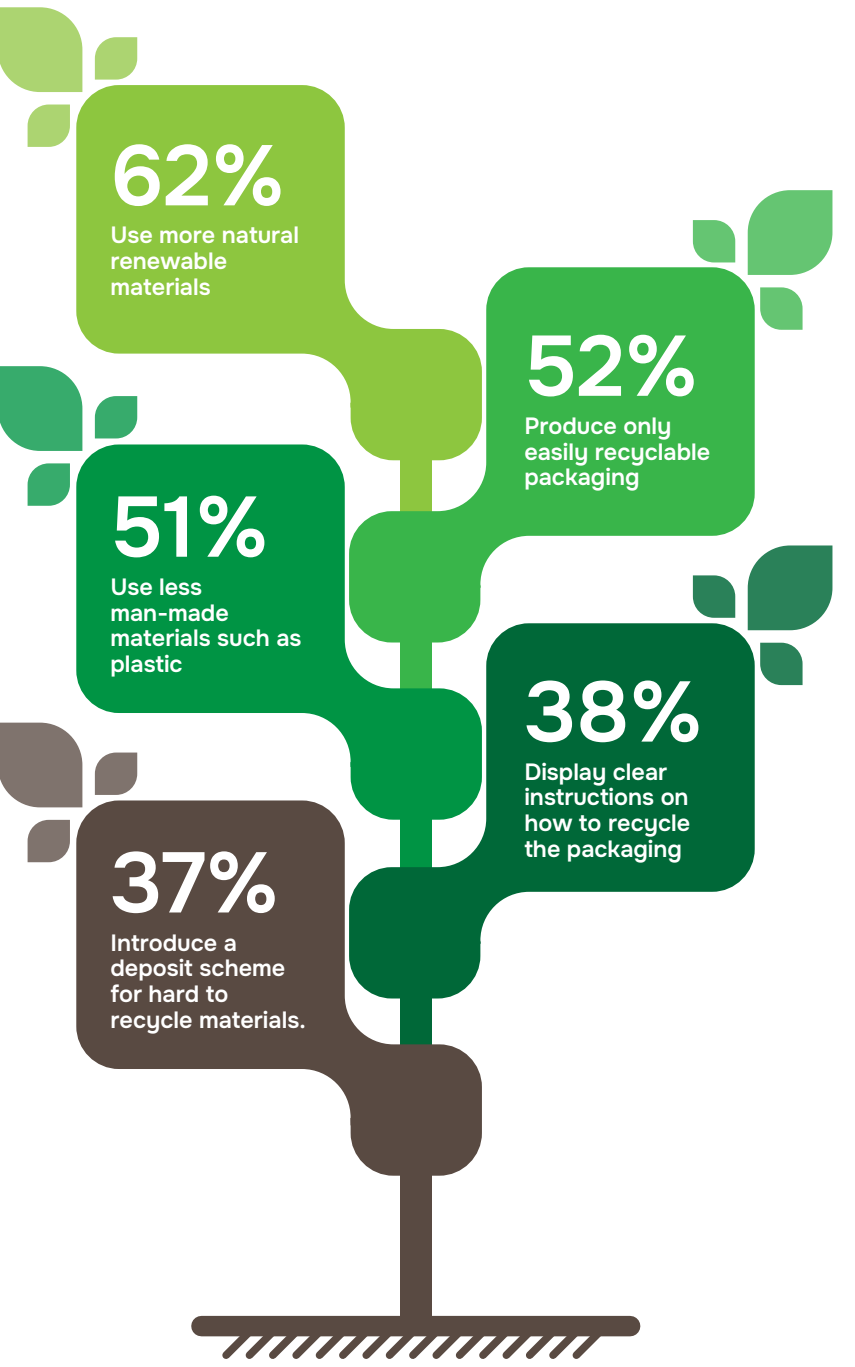
Companies and brands can help the environment by focusing on key actions.

62% of consumers believe businesses should use more natural, renewable materials. Italy (69%) and Spain (67%) are leading the way. 52% think packaging should be made easily recyclable.

Additionally, more than half (51%) suggest reducing the use of man-made materials, such as plastic, and 38% highlight the importance of clear recycling instructions. Over a third (37%) also support the introduction of deposit schemes for hard-to-recycle materials. These insights demonstrate the actions consumers expect companies to take, emphasising sustainability and eco-friendly packaging as top priorities to protect the environment.

The data reveals a clear difference in environmental priorities across age groups, with older consumers placing greater emphasis on sustainable packaging practices compared to younger generations.

Individuals aged 60+ are more likely than 18-24-year-olds to prioritise brands using more natural, renewable materials. They are also more likely to believe that producing only easily recyclable packaging is essential and more likely to advocate for reducing the use of man-made materials such as plastic.



Recycling confidence

84% are confident about which packaging materials can be recycled

84% of consumers in Europe feel confident/very confident in deciding which packaging material can be recycled.

This is an increase of 2% compared to our 2024 study and shows that European consumers are interested in the impact their purchasing decision makes on the environment.

The highest level of confidence we see with consumers in Italy and Spain, where 89% of respondents shared their confidence.

How confident are you about different materials that will be recycled?

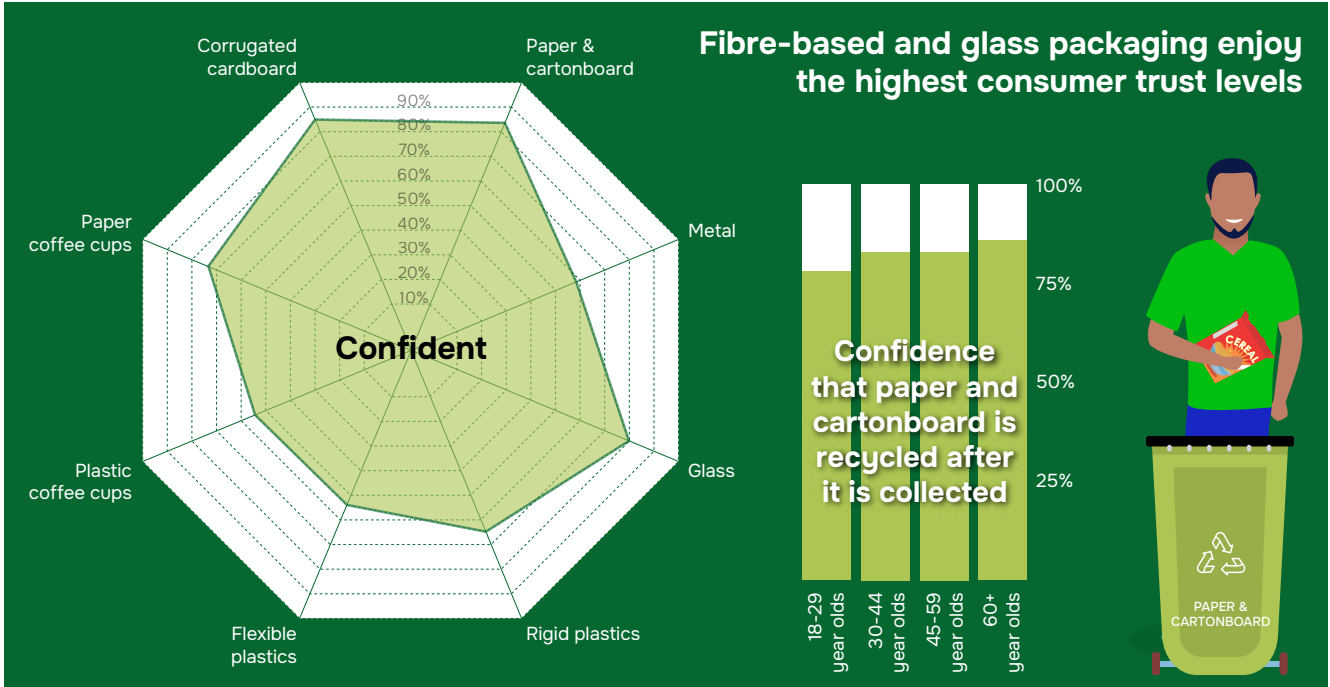
Consumer confidence in the recyclability of various materials varies significantly.

Confidence is highest for corrugated cardboard, with 85% feeling assured it will be recycled, followed by paper and cartonboard (83%), and glass (80%). This confirms last year’s findings, where first time we

saw the confidence levels for fibre-based packaging surpassing those of glass.

Confidence drops for rigid plastics like bottles (65%) and metal, with only 59% of consumers confident it will be recycled. Same as last year, flexible plastics – such as crisp or chocolate wrappers – showed the lowest confidence levels with just 54% of consumers trusting that these materials will be recycled.

The study also confirmed last year’s figures for paper and plastic cups: With 73% paper cups enjoy a significantly higher trust level than plastic cups with 54%.



This high level of confidence in cartonboard recyclability is encouraging news for the industry, as it reinforces the positive perception of cartonboard as a sustainable packaging solution.

By continuing to promote its environmental benefits and ensuring clear and accessible recycling information, the industry can further solidify cartonboard’s position as a leading choice for eco-conscious consumers and brands.

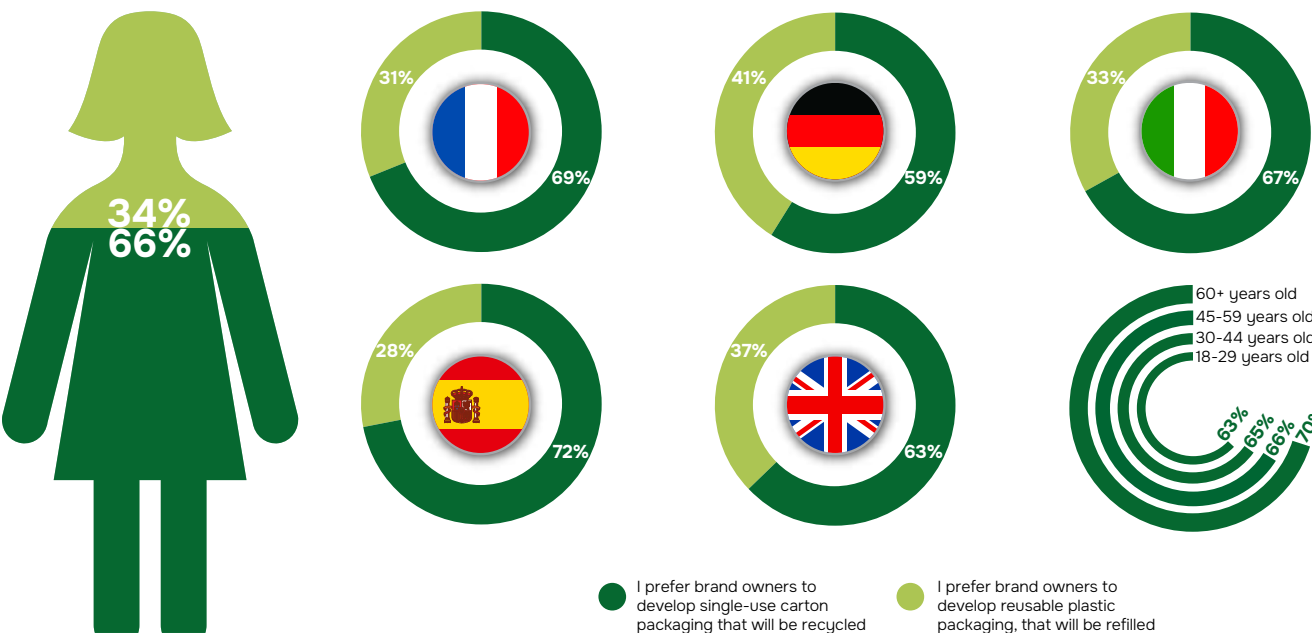
Single use vs. returnable

Two in three consumers prefer single-use over returnable packaging developments

When it comes to packaging preferences, the majority of consumers (66%) prefer that brand owners develop single-use carton packaging that can be recycled.

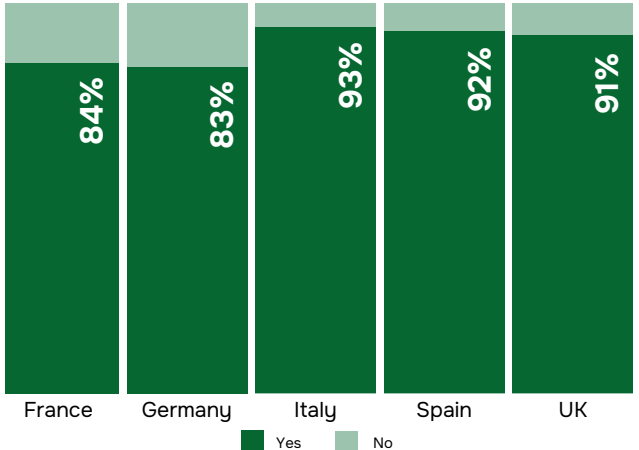
In contrast, 34% prefer the development of reusable plastic packaging that can be refilled.

This highlights a strong consumer preference for recyclable solutions, particularly those made from renewable materials like cartons, over refillable options. The data suggests that sustainability efforts focused on recycling may resonate more strongly with consumer priorities.



89% of European consumers welcome labels that explain recycling streams

89% of consumers clearly confirmed their preference for printing recycling information on the package, in a major call to further increase recycling rates.



Comparison with 2024



Economic anxieties take centre stage

In 2024, climate change was the top concern for most European countries, with the cost of living a close second. However, 2025 saw a marked shift, with the cost of living now the dominant worry across the continent (66%), surpassing climate change (62%). This economic anxiety is particularly pronounced in the UK, where 79% of respondents now cite it as their primary concern, compared to 75% in 2024. This shift likely reflects the ongoing cost-of-living crisis and its impact on household budgets.



Sustainability endures, with conditions

Despite economic pressures, commitment to sustainability remains strong. In 2025, 57% of respondents stated that a sustainable lifestyle had become more important, compared to 62% in 2024. However, this commitment is increasingly tempered by affordability concerns. In 2025, 64% of consumers stated they would only purchase sustainable goods if they cost the same as alternatives, compared to 79% in 2024. This highlights the need for brands to offer affordable, eco-friendly options.



Recycling remains a key action

Recycling remains a cornerstone of sustainable behaviour, with 62% of respondents in 2025 reporting that they recycled more waste in the last year. 67% of consumers see recycling as the key action to stop the negative impact of climate change. And this year confidence in recycling further strengthened, with 84% of respondents in 2025 feeling confident about what can be recycled, compared to 82% in 2024.



Cartonboard strengthens its appeal

Cartonboard continues to be the preferred packaging choice, with 89% of respondents in 2025 choosing it over plastic, compared to 87% in 2024. This suggests that cartonboard's association with sustainability and recyclability resonates strongly with consumers. Furthermore, the desire for easy-to-recycle packaging continues to be of importance, with 70% prioritising this feature in 2024, and 65% in 2025.



Regional variations persist

Differences between countries persist, particularly regarding the relative importance of climate change and economic concerns. Whilst climate change remains a top priority in Spain, Italy and France, economic anxieties are more pronounced in the UK and Germany. This highlights the need for tailored communication strategies that resonate with the specific concerns of each market.

Key findings summary

Cost-of-living crux

77% of respondents are more worried about the cost of living than they were a year ago. With, 66% saying it's the biggest issue they face.

Sustainable purchases are still high on the agenda, but 64% only purchase if the cost is equal to traditional alternatives.

Perceived environmental impact

The most common environmentally friendly action that consumers have done in the last year is recycling more (62%).

Consumers are increasingly buying local (42%), supported by an increase in reducing water usage, at 51%.

Packaging preferences

There's an overwhelming preference for fibre-based materials, as 89% would choose a product packaged in cartonboard over the same product in plastic.

Consumers are most confident in the recyclability of corrugated cardboard (85%), paper/cartonboard (83%), glass (80%) and metal packaging (59%).

Consumer loyalty wanes as 40% report switching brands or products in the last 12 months due to packaging concerns.

Accountability for packaging is a key question, with 57% of consumers believing manufacturers bear the greatest responsibility, followed by consumers themselves (21%), government (14%), and retailers (8%).

Despite concerns around the cost-of-living, consumers have indicated they will pay more for eco-friendly packaging, averaging 6.4% more. Young adults (18-25) are willing to pay the most (8.7%), while older consumers (60+) are less inclined (4.7%).

Recycling and re-use

A sustainable lifestyle is increasingly top-of-mind for consumers, with 57% reporting that its importance has grown in the last 12 months.

This increased focus on sustainability is translating into action, as 50% of consumers say they have been recycling more in the past year.

Consumers also demonstrate a strong understanding of recycling practices, with a strong 84% expressing confidence in their knowledge of what packaging can be recycled.

Consumers show a preference for single-use recyclable packaging, with 66% opting for these materials over reusable plastics (34%) that are ready for refill.

Regional differences

Italians demonstrate a strong commitment to sustainability, with 59% reporting increased recycling efforts and the highest willingness to pay for sustainable packaging, at 7.3% extra.

59% of consumers in Italy and 58% of consumers in Spain have the environmental impact of their purchasing decision in mind at POS before they buy a product. These figures are significantly higher than in other countries.

UK consumers have the highest confidence in the recycling of paper and cartonboard materials (88%) and the lowest confidence of flexible plastics (49%)

France ranks climate change as the biggest issue we face.

In Spain, a commitment to sustainable living is particularly strong, with consumers prioritising eco-conscious choices (64%)

27% of consumers in Germany changed brands because of excessive packaging, the highest across Europe, highlight German consumers' sensitivity to such concerns.



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