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FEVE

FRIENDS OF GLASS

GLOBAL REPORT – JULY 2022

FOR

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RESEARCH BACKGROUND

EXECUTIVE SUMMARY

DETAILED RESULTS

RESEARCH BACKGROUND

OBJECTIVES

- Identify Glass consumption evolution over last 3 years
- Identify main drivers and barriers of glass consumption
- Understand main attitudes towards sustainability and the position of glass to these attitudes”
- Scope: 13 countries

Tier 1:



Tier 2:



ABBREVIATIONS USED THROUGHOUT REPORT

T1B%: Top 1 Box (e.g., completely agree)

T2B%: Top 2 Box (e.g., agree & completely agree)

B2B%: Bottom 2 Box (e.g., completely disagree, disagree)

Delta: T2B% - B2B%

METHODOLOGY

Method: Online quantitative survey

Fieldwork period: June 2022

Interview length: 15 minutes

Country: Spain, UK, Germany, Italy, France, Austria, Switzerland, Czech Republic, Croatia, Poland, Portugal, Slovakia, Turkey

Screening & sample composition:

- Nat rep on age & region
- 75% women / 25% men
- Co-responsible for household purchases

Sample size:

- **N = 500 for 1st tier countries**
 - Spain, UK, Germany, Italy, France
- **N = 200 for second tier countries**
 - Austria, Switzerland, Czech Republic, Croatia, Poland, Portugal, Slovakia, Turkey

SURVEY STRUCTURE / BLOCKS

INFLUENCES ON
PURCHASING BEHAVIOUR

EVOLVING PREFERENCE
FOR GLASS

ATTITUDES TOWARDS
SUSTAINABILITY

HEALTH & PRODUCT
PRESERVATION

ATTITUDES TO REUSE &
RECYCLING

DESIGN & BRANDING
OF GLASS PACKAGING

COUNTRY
SCORECARDS

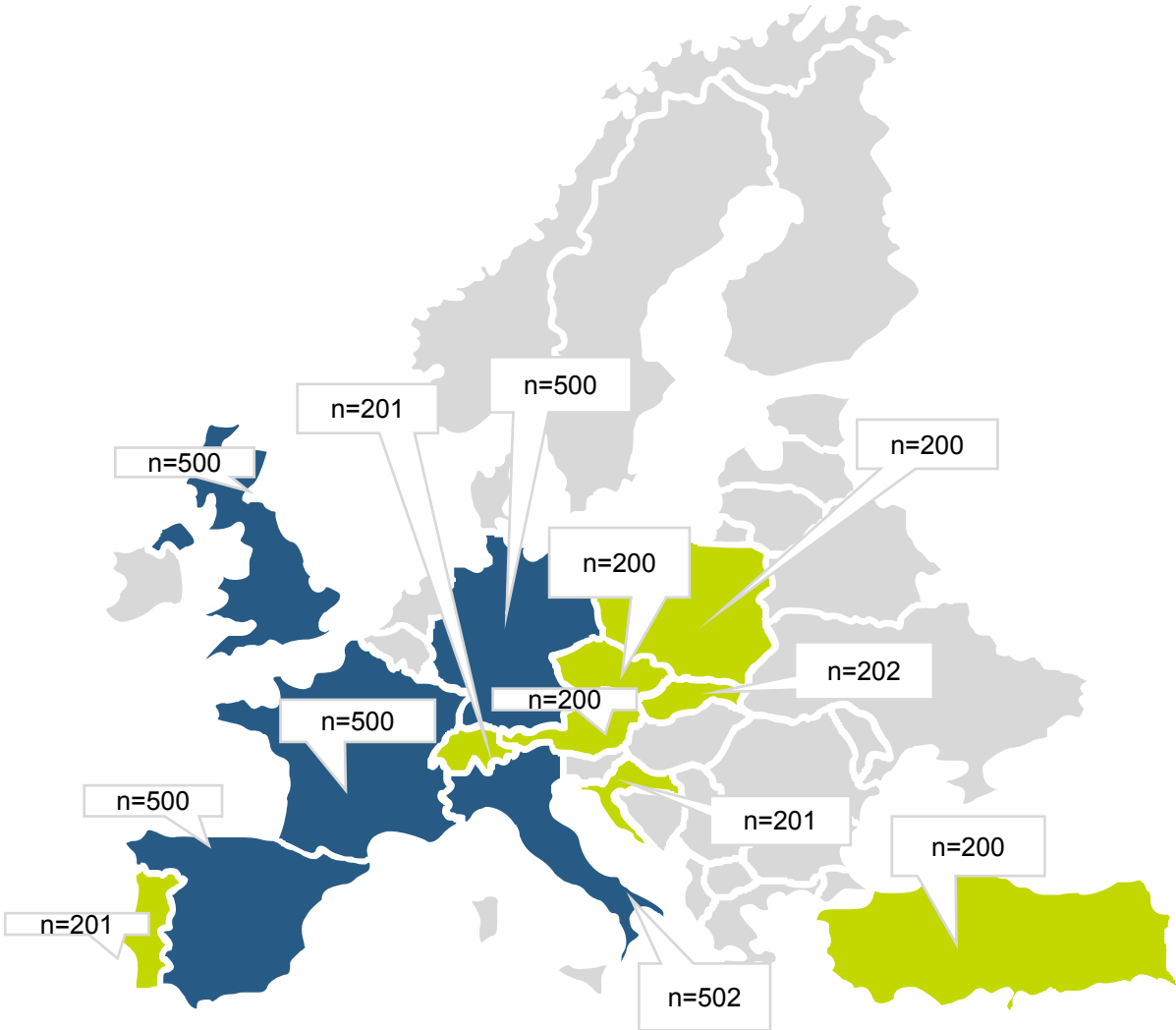
SAMPLE PROFILING | $N = 4107$

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

Tier 1:



Tier 2:



COMPARABILITY WITH DIFFERENT WAVES

2022	2020	2016	2014	2010
SAMPLE n=4 107	SAMPLE n=10 605	SAMPLE n=13 054	SAMPLE n=8135	SAMPLE n=8621
COUNTRIES	COUNTRIES	COUNTRIES	COUNTRIES	COUNTRIES (n=500)
• Tier 1 (n=2502) • France • Italy • Germany • Spain • UK • Tier 2 (n=1605) • Austria • Croatia • Czech Republic • Slovakia • Switzerland • Turkey • Poland • Portugal	• Tier 1 (n=1000) • France • Italy • Germany • Spain • UK • Poland • Portugal • Tier 2 (n=600) • Austria • Croatia • Czech Republic • Slovakia • Switzerland • Turkey	• Tier 1 (n=2000) • France • Italy • Germany • Spain • UK • Tier 2 (n=500) • Austria • Croatia • Czech Republic • Poland • Slovakia • Switzerland	• Tier 1 (n=1000) • France • Italy • Germany • Spain • UK • Tier 2 (n=500) • Austria • Croatia • Czech Republic • Poland • Slovakia • Switzerland	• Belgium • Netherlands • France • Germany • Spain • Austria • Czech Republic • Greece • Hungary • Italy • Poland • Portugal • Slovakia • Switzerland • Turkey • UK



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KEY CONCLUSIONS



Purchase Behaviour of Glass

- Purchase of products in glass has increased
- Driven by perceived **recyclability** and positive **impact on environment**
- Consumers **recommend glass** packaging and see it as a **material of the future**
- **Barriers** for glass: **convenience** and perceived **price**
- Room to promote glass packaging, as **ad exposure levels are below the 2019 levels**



Sustainability & Health

- Most relevant aspects of the sustainability debate: **reducing food waste** and **increasing recycling**
- **Companies should play a major role** by using **sustainable packaging** and **informing consumers about recycling**
- Glass is important in this debate as it's seen as a good material to prevent **health** and **environmental concerns**
- **Glass packaging is also trusted when recycled** aside from Plastic/PET



Reuse & Recycling

- **Most EU consumers recycle**, which is seen as **self-evident** and **key to live more sustainable**
- This is supported by **efficient local collection and recycling systems** in most areas
- Most consumers believe that **glass is effectively recycled**
- **More limited opportunity for a DRS system** (1 in 4 believe in such a system and 1 in 5 are willing to pay deposit)
- In **direct comparison**, consumers prefer a **bottle bank** solution



Design & Branding

- **7 out of 10** report that packaging plays a crucial role in telling brands apart and enhancing the value of a product. This is also the case for **glass**.
- Consumers **easily recall global and local brands** with **distinctive glass packaging**, such as **Coca-Cola, Nutella, Barilla** or **Heinz**.



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INFLUENCES ON PURCHASING BEHAVIOUR



InSites Consulting





KEY RESULTS



Preference for glass is growing due to strong eco-conscious properties and despite a lack of convenience

- **Glass usage has increased globally** compared to other kinds of packaging, especially in **Turkey, Poland and Austria**.
- Mainly because of the **perceived recyclability of glass** and its **positive impact on the environment**.
- Glass packaging barriers include the **perceived expensiveness** and **convenience** (heavier, more difficult to transport etc..)
- Net usage of products in glass packaging has **decreased in some markets**, such as **France, the UK, Czech Republic and Croatia**.
- Consumers could be **further encouraged to buy glass packages** instead of others by working on (perceived) **affordability, convenience (lighter packaging)** and a good **availability of their favourite products in glass packs**.

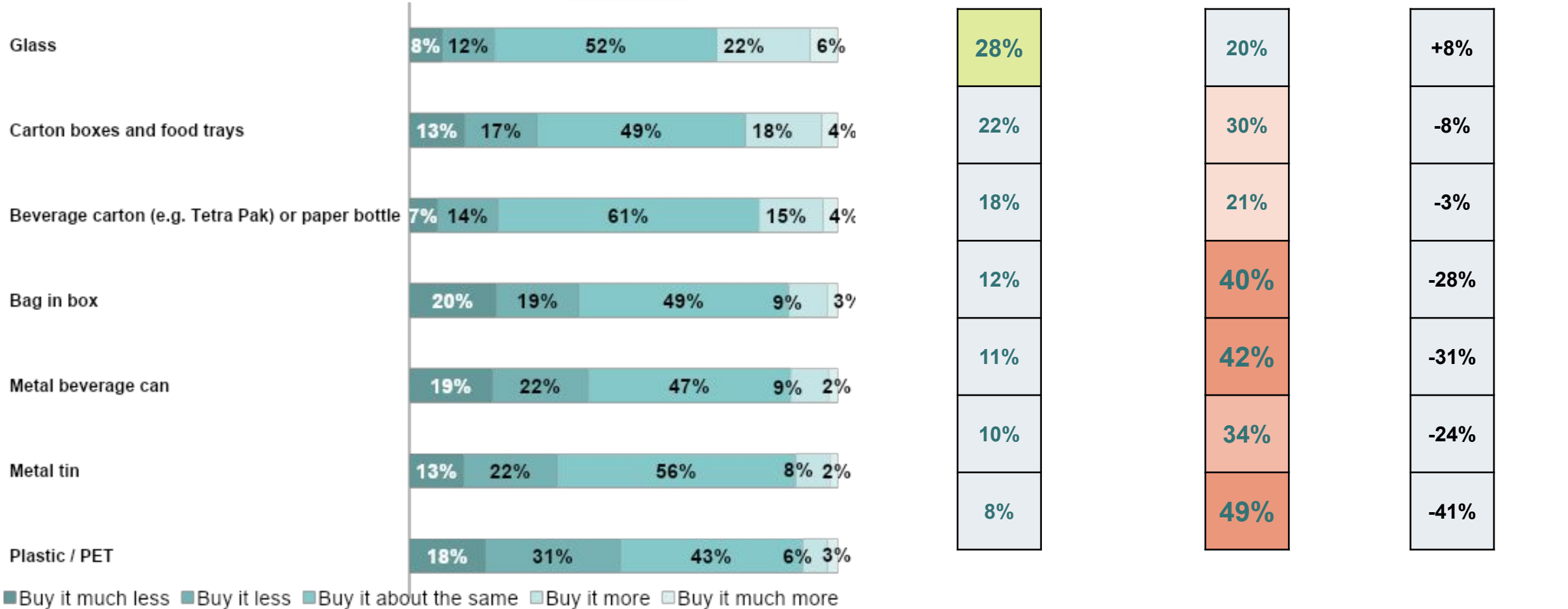


Glass is the only packaging material that shows increased usage

Glass is the only packaging material that shows an increased usage trend over the past 3 years (8% higher compared to 3 years ago), globally. Bags, metal, plastic are on the contrary much less used with results between 24 and 41%.

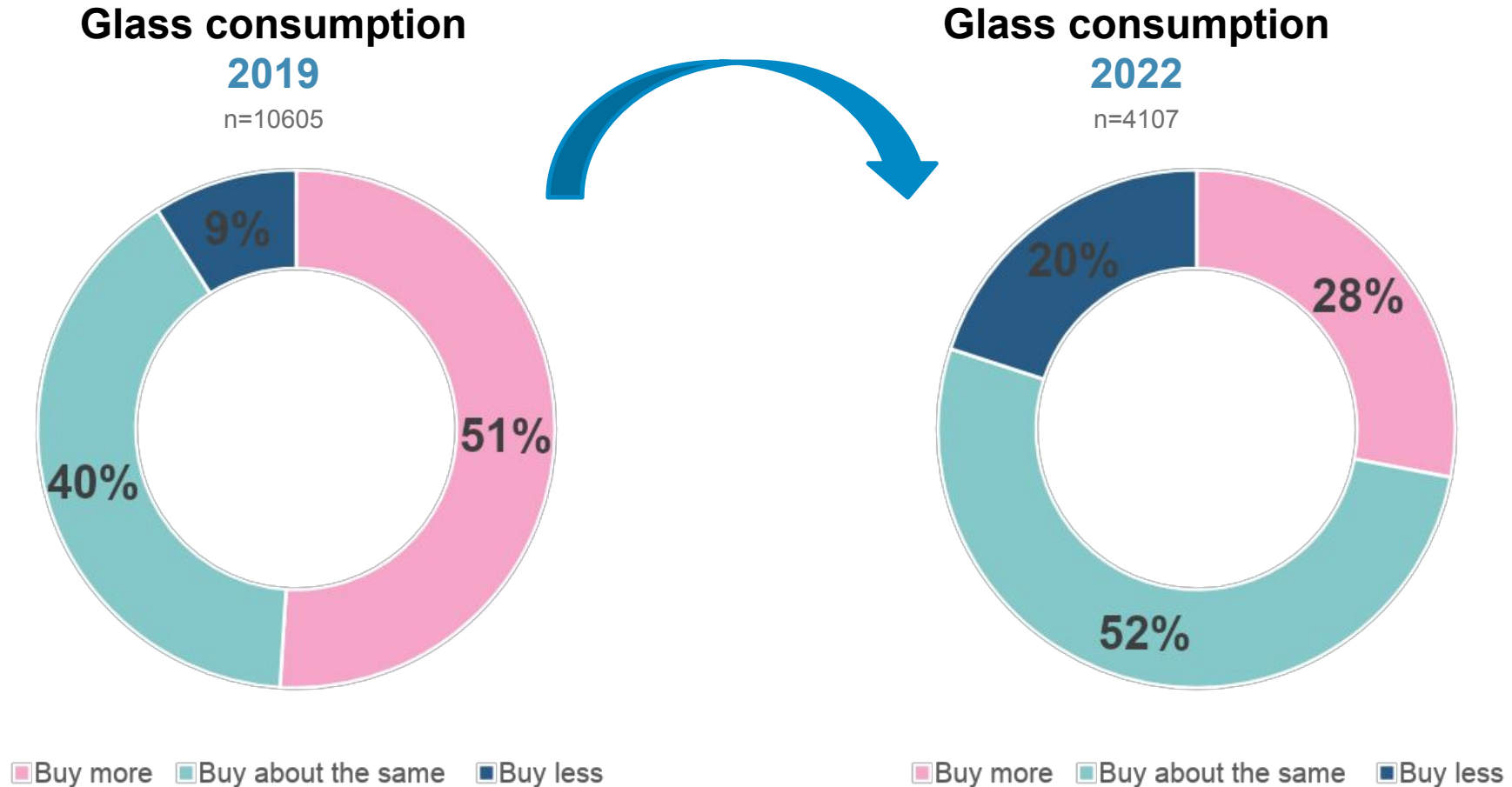


Total Sample



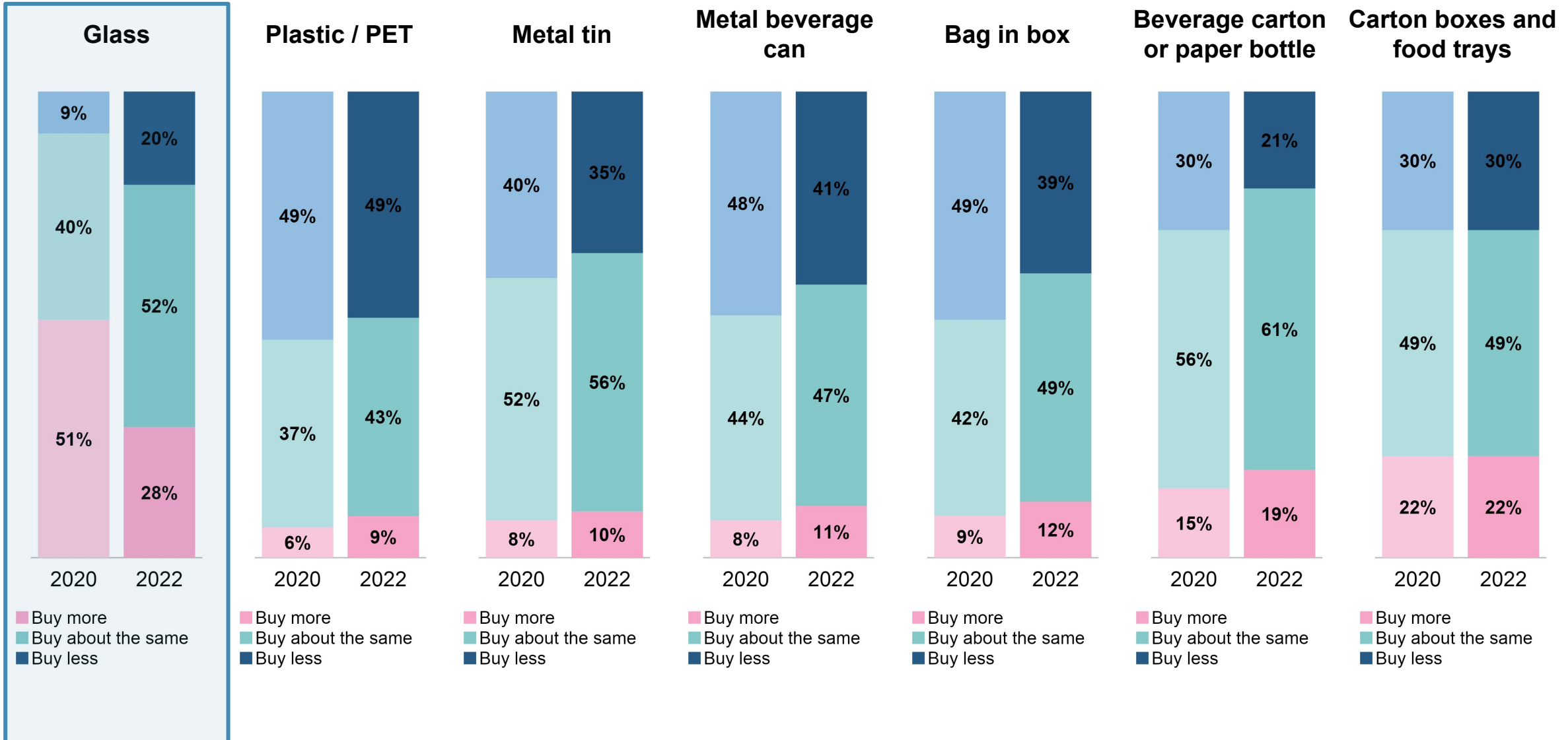
Glass usage has decreased since the last wave

While purchase of products in glass has increased, there appears a ceiling Compared to 2019, the increase is lower (28% vs. 51%, while a higher proportion decreases their consumption of products in glass (20% vs. 9%). Yet, a total of 80% indicates that they buy consume glass at least the same and only 20% consuming it less than 3 years ago.



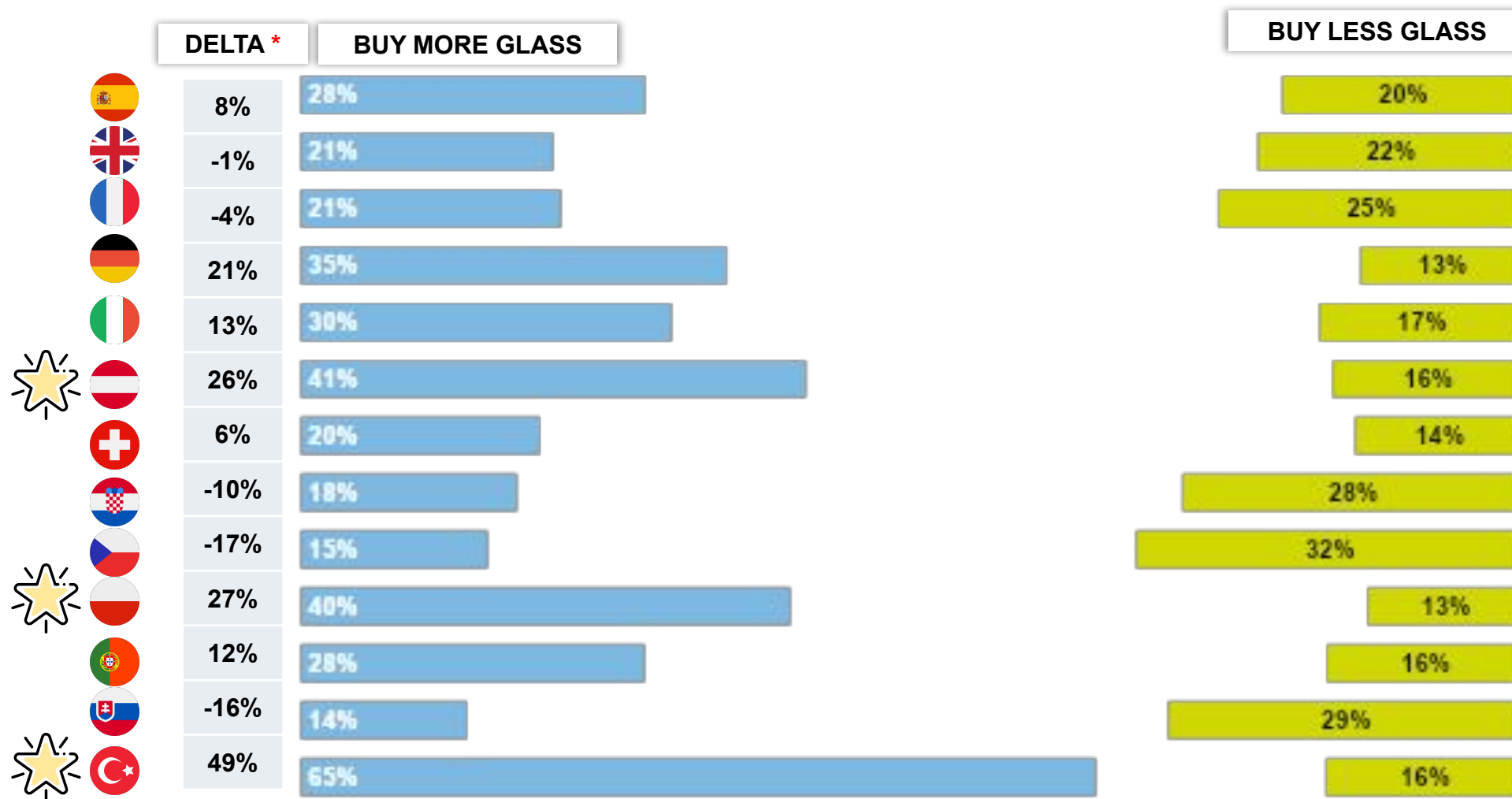
Plastic usage has slightly increased since the last wave

The trends for all packaging material are fairly similar to the previous wave, with a slight increase in plastic and metal beverage cans consumption.



In Turkey, Poland and Austria, usage of glass is increasing the strongest

In Austria, Poland and especially in Turkey, the purchase of food and beverages in glass is increasing, contrary to Croatia, Slovakia and especially Czech Republic where there is a decreasing trend in glass usage. In France, Switzerland, Spain and UK, glass usage is quite stable.



Q7: Compared to 3 years ago, in what way has your purchase of food and beverages in each of the following packaging materials evolved? - N=4107

* Delta: [% Buy more] – [% Buy less]



Purchase of packaging material over time *by country*

Glass shows a more positive trend than other materials globally, which is particularly the case in Turkey, Poland, Austria, Germany and Italy. PET is decreasing most noticeably in Austria, while metal cans also show a decrease, particularly in France, Germany and Portugal.



														
	Total	N=500	N=500	N=500	N=500	N=502	N=200	N=201	N=201	N=202	N=200	N=201	N=200	N=200
Glass	8%	8%	-1%	-4%	21%	13%	26%	6%	-10%	-17%	27%	12%	-16%	49%
Beverage carton (e.g. Tetra Pak) or paper bottle	-2%	7%	-2%	-14%	-11%	2%	-18%	3%	-3%	-11%	14%	17%	-14%	13%
Carton boxes and food trays	-8%	-3%	4%	-19%	-3%	-2%	5%	-16%	-35%	-35%	8%	3%	-42%	-1%
Metal tin	-24%	-23%	-6%	-30%	-24%	-20%	-30%	-15%	-36%	-43%	-26%	-33%	-32%	-30%
Bag in box	-28%	-10%	-20%	-43%	-32%	-31%	-32%	-36%	-35%	-35%	-25%	-9%	-49%	-10%
Metal beverage can	-31%	-25%	-13%	-45%	-43%	-27%	-35%	-26%	-33%	-26%	-31%	-43%	-27%	-27%
Plastic / PET	-41%	-48%	-38%	-47%	-34%	-42%	-55%	-23%	-33%	-32%	-42%	-50%	-39%	-42%

Significantly **higher** / **lower** Country vs. Global

Q7: Compared to 3 years ago, in what way has your purchase of food and beverages in each of the following packaging materials evolved? – N=4107

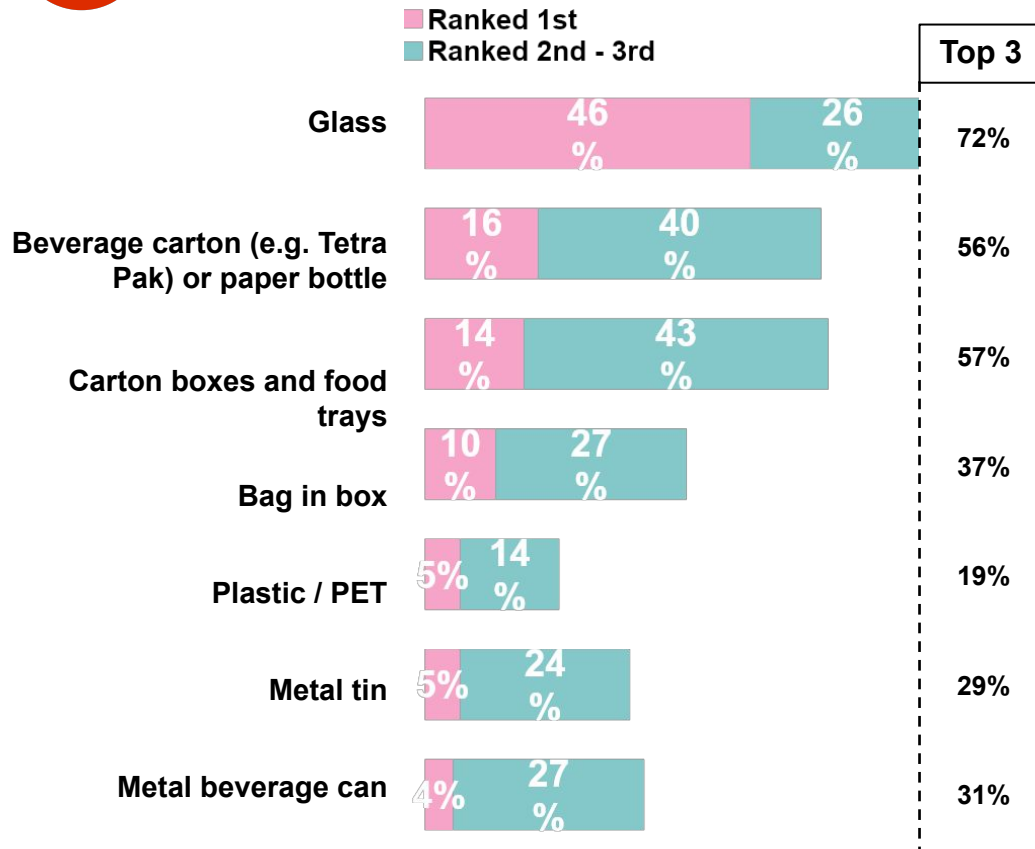
* Delta: [% Buy more] – [% Buy less]

Zoom in on Spain & Italy

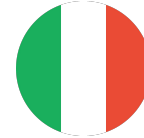
The majority of Spanish consumers prefer to buy products packaged in glass. Carton/paper bottles are considered second. PET and metal are less relevant. Consumers in Italy rank glass as their most preferred packaging solution, followed by tetra pack and carton boxes.



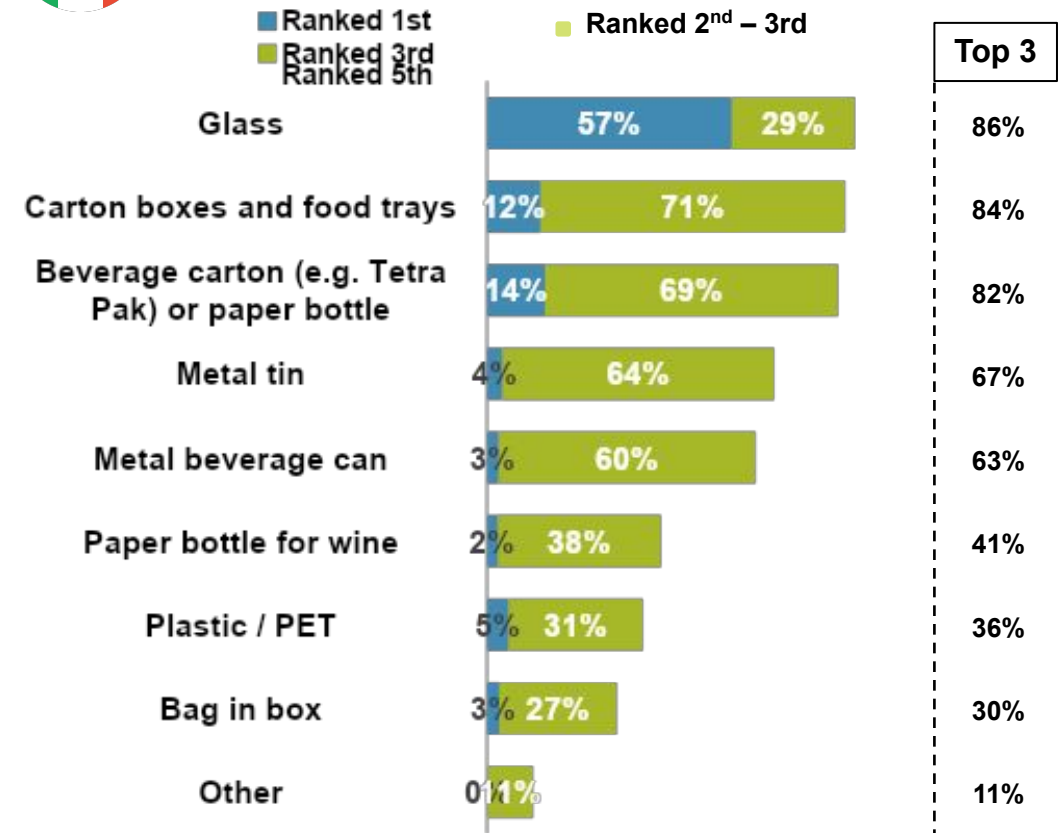
Preferred packaging for packaged food and beverages in supermarket



Q12 : Which would be your preferred packaging solution when you want to buy packaged food and beverages at the supermarket? Please rank the following packaging options from most preferred to least preferred. – N=500



Preferred packaging



Q21: There is an increasing number of packaging options available on the market. Below, we have listed some of the most common – both new and existing – packaging solutions. Please choose up to 5 packaging options and rank them in order of your personal preference. - N=502

Sustainability and recyclability are key drivers for glass

Globally, consumers buy more glass because of its recycling properties, and the positive impact it has on the environment. Many also consider glass to be better at preserving health than other materials.



Total Sample



28% buy MORE glass compared to 3 years ago

Among them

Environmental
impact

Health

Food conservation

Premiumness

Offer availability

It can be recycled more effectively than other packaging materials

50

%

It causes less packaging waste

43

%

It causes less littering of packaging into the environment

41

%

Disposing and collecting glass for recycling is convenient

39

%

It's better at preserving your health than other materials

35

%

Products last longer in glass

35

%

Producing glass packaging is less harmful for the environment
than other packaging

34

%

It has a lower impact on wildlife or marine life

34

%

It's better at preventing food contamination than other materials

33

%

It gives a strong health safety feeling

31

%

Products in glass packs often are or feel more premium / of higher quality

28

%

It causes less food waste

26

%

It gives me a stronger feeling of wellness or self-care

23

%

I prefer the packaging design of glass packaging

19

%

I can find more products available in glass packaging

17

%

My preferred brands started using more glass packaging

16

%

It's less expensive to buy products in glass packaging

6%

Glass drivers *by country*

Sustainability and recyclability are key across all markets, but particularly pronounced in Germany, Austria and Portugal. In Turkey, glass also gives a strong safety feeling, which is the main driver. Food contamination is key in Poland and the Czech Republic.



														
	Total N=1158	N=141	N=103	N=106	N=174	N=152	N=83	N=39	N=35	N=31	N=80	N=56	N=27	N=130
It can be recycled more effectively than other packaging materials	50%	56%	56%	46%	48%	48%	52%	54%	53%	50%	47%	65%	52%	35%
It causes less packaging waste	43%	40%	40%	41%	57%	41%	49%	48%	28%	36%	30%	45%	58%	42%
It causes less littering of packaging into the environment	41%	37%	29%	33%	48%	25%	56%	48%	38%	42%	47%	47%	66%	45%
Disposing and collecting glass for recycling is convenient	39%	33%	33%	30%	39%	35%	44%	40%	29%	47%	44%	41%	46%	52%
It's better at preserving your health than other materials	35%	39%	24%	22%	36%	30%	30%	32%	67%	34%	38%	26%	46%	54%
Products last longer in glass	35%	34%	33%	31%	29%	28%	21%	32%	48%	33%	40%	35%	55%	53%
Producing glass packaging is less harmful for the environment than other packaging	34%	37%	33%	29%	25%	36%	32%	31%	40%	29%	33%	41%	49%	44%
It has a lower impact on wildlife or marine life	34%	32%	39%	28%	30%	42%	29%	25%	20%	38%	44%	39%	42%	28%
It's better at preventing food contamination than other materials	33%	37%	28%	14%	20%	30%	32%	27%	42%	54%	43%	31%	48%	53%
It gives a strong health safety feeling	31%	34%	18%	17%	28%	21%	32%	20%	31%	26%	40%	30%	33%	62%
Products in glass packs often are or feel more premium / of higher quality	28%	25%	24%	18%	33%	23%	35%	28%	37%	26%	25%	13%	30%	43%
It causes less food waste	26%	29%	18%	32%	23%	28%	23%	23%	20%	14%	20%	22%	46%	33%
It gives me a stronger feeling of wellness or self-care	23%	28%	23%	19%	24%	18%	15%	28%	6%	13%	36%	12%	38%	27%
I prefer the packaging design of glass packaging	19%	22%	18%	25%	18%	9%	14%	18%	32%	28%	25%	13%	31%	25%
I can find more products available in glass packaging	17%	19%	24%	12%	11%	12%	22%	5%	16%	23%	26%	23%	21%	20%
My preferred brands started using more glass packaging	16%	19%	22%	7%	15%	12%	15%	2%	22%	14%	20%	16%	17%	24%
It's less expensive to buy products in glass packaging	6%	5%	10%	1%	7%	4%	5%	3%	9%	9%	2%	12%	4%	6%

Q8: You indicated that you buy more products in glass compared to 3 years ago. Please specify why - N=1158

Significantly **higher** / **lower** Country vs. Global

Low Sample size

Lack of convenience and pricing are key barriers

In most countries, consumers buy less glass because it's less convenient than other forms of packaging, and usually less available and more expensive.



20% buy LESS glass compared to 3 years ago

Among them

Environmental concerns

Health concerns

Lack of convenience

Price



Total Sample



Glass barriers *by country*

Lack of convenience is a hurdle in many markets, but especially in Austria and Poland, while it is less relevant in the UK and Spain. Price has an impact in Slovakia, while product availability is a barrier in the UK.



It's less convenient than other packaging solutions	37%	23%	27%	32%	40%	38%	65%	34%	47%	45%	57%	36%	42%	29%
It's more expensive to buy products in glass packaging	34%	38%	35%	33%	16%	32%	26%	30%	31%	45%	47%	19%	50%	45%
I can find fewer products available in glass packaging	29%	31%	40%	21%	22%	20%	31%	24%	25%	24%	48%	35%	38%	36%
Disposing and collecting glass for recycling is inconvenient	23%	21%	18%	27%	31%	20%	21%	28%	30%	20%	30%	15%	16%	14%
My preferred brands started using less glass	21%	19%	33%	16%	12%	21%	13%	13%	21%	21%	23%	34%	14%	26%
It causes more packaging waste	16%	16%	23%	15%	8%	18%	6%	23%	14%	11%	32%	22%	15%	9%
It causes more littering of packaging into the environment	13%	14%	13%	18%	16%	14%	8%	0%	13%	8%	16%	9%	8%	8%
It is less recyclable than other packaging materials	11%	9%	11%	13%	13%	14%	5%	7%	10%	4%	14%	10%	15%	12%
It has a higher impact on wildlife or marine life	10%	10%	15%	11%	9%	13%	6%	3%	2%	3%	19%	6%	11%	18%
It causes more food waste	9%	7%	9%	12%	12%	8%	16%	6%	9%	1%	0%	11%	14%	16%
Producing glass packaging is more harmful for the environment	7%	9%	15%	6%	8%	3%	12%	3%	3%	5%	0%	6%	6%	7%
It gives a lower health safety feeling	6%	5%	7%	7%	4%	5%	6%	7%	2%	2%	0%	19%	6%	7%
It's worse at preventing food contamination than other materials	5%	5%	10%	8%	7%	5%	5%	0%	0%	0%	4%	3%	5%	5%
It gives a lower impression of quality for the product	5%	3%	6%	7%	9%	3%	3%	3%	2%	1%	8%	3%	3%	13%
It gives me a lower feeling of wellness or self-care	5%	9%	6%	5%	5%	2%	0%	8%	4%	3%	0%	3%	3%	8%
It's worse at preserving your health than other materials	4%	4%	4%	4%	10%	0%	0%	7%	0%	3%	8%	3%	7%	4%
Other	5%	6%	5%	5%	0%	9%	0%	11%	2%	10%	0%	0%	4%	6%

Significantly **higher** / **lower** Country vs. Global

Q 9: You indicated that you buy less products in glass compared to 3 years ago. Please specify why? - N= 815

Low Sample size

Glass purchase can be encouraged by a combination of pricing, product choice and convenience

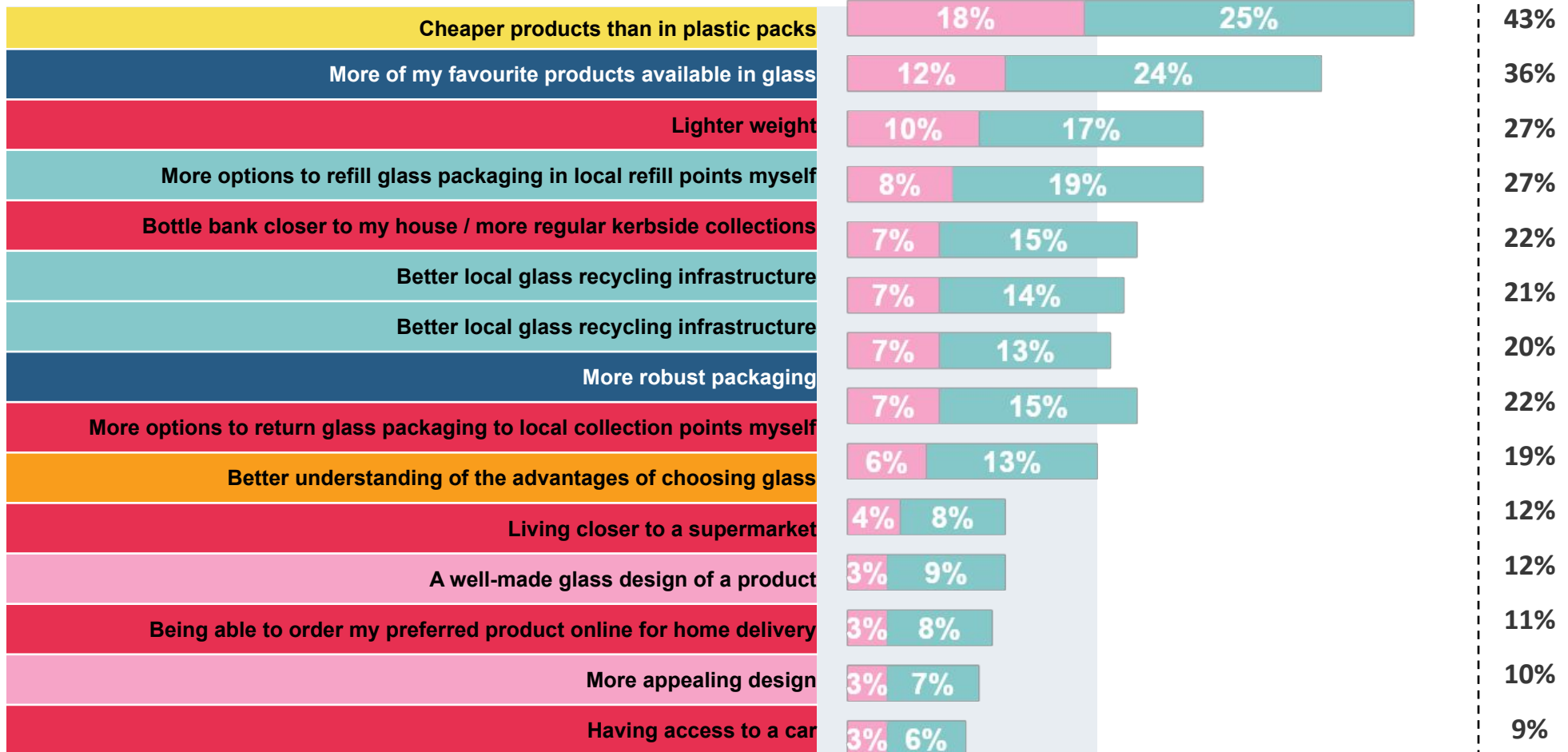
The top encouraging factor to purchase glass would be to make glass products more affordable, increasing the glass products currently available on the market, and making glass packaging lighter.



Total Sample

Ranked 1st Ranked 2nd - 3rd

Top 3



Pricing

Product Specs

Recycling

Convenience

Education

Design

Factors that would encourage glass purchases *by country*

Results in Turkey, Spain and Italy confirm there is a need for more local collection options as they have expressed more difficulties about disposal of glass.



Top 3	             													
	Total	N=500	N=500	N=500	N=500	N=502	N=200	N=201	N=201	N=202	N=200	N=201	N=200	N=200
Cheaper products than in plastic packs				45%	35%	45%	43%	40%	47%	53%	45%	48%	48%	11%
More of my favourite products available in glass				32%	39%	36%	43%	46%	34%	42%	40%	35%	31%	21%
Lighter weight				29%	34%	26%	33%	34%	21%	33%	24%	22%	36%	7%
More options to refill glass packaging in local refill points myself				22%	24%	25%	33%	30%	29%	25%	21%	27%	18%	17%
Bottle bank closer to my house / more regular kerbside collections				29%	18%	21%	20%	24%	27%	16%	18%	24%	24%	34%
Better local glass recycling infrastructure				21%	23%	20%	22%	16%	22%	19%	24%	18%	21%	35%
Better local glass recycling infrastructure				24%	20%	22%	15%	15%	22%	24%	22%	25%	7%	35%
More robust packaging				21%	17%	18%	20%	15%	24%	21%	37%	26%	30%	19%
More options to return glass packaging to local collection points myself				16%	16%	22%	16%	19%	12%	7%	15%	28%	15%	47%
Better understanding of the advantages of choosing glass				11%	14%	12%	14%	12%	13%	16%	11%	10%	14%	10%
Living closer to a supermarket				14%	12%	11%	9%	12%	12%	9%	12%	12%	11%	23%
A well-made glass design of a product				9%	16%	13%	11%	11%	12%	9%	6%	7%	10%	13%
Being able to order my preferred product online for home delivery				11%	9%	10%	5%	9%	13%	7%	15%	9%	10%	20%
More appealing design				8%	12%	10%	9%	10%	11%	12%	7%	6%	6%	5%
Having access to a car														
Other	1%	1%	2%	1%	1%	1%	1%	1%	1%	2%	0%	2%	2%	0%

Q10: What would encourage you to buy products in glass packaging more often? Choose up to 5 factors – N=4107

Significantly **higher** / **lower** Country vs. Global

EVOLVING PREFERENCE FOR GLASS



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KEY CONCLUSIONS

Glass is perceived as a safe and sustainable material for the future but is pricey for consumers.

- **8 out of 10 consumers** believe in **glass as a material for the future** and **would recommend it to friends and family**.
- Glass packaging is seen as a **safe** and **eco-friendly** option, especially in **Turkey, Portugal and Spain**.
- **Willigness to pay a premium for glass packs is limited**. Only 50% are actually willing to pay more to have glass packagings.
- There is **further room to promote glass via campaigns to consumers**. A quarter of consumers has been exposed to glass campaigns, which is less than the 36% in 2019.

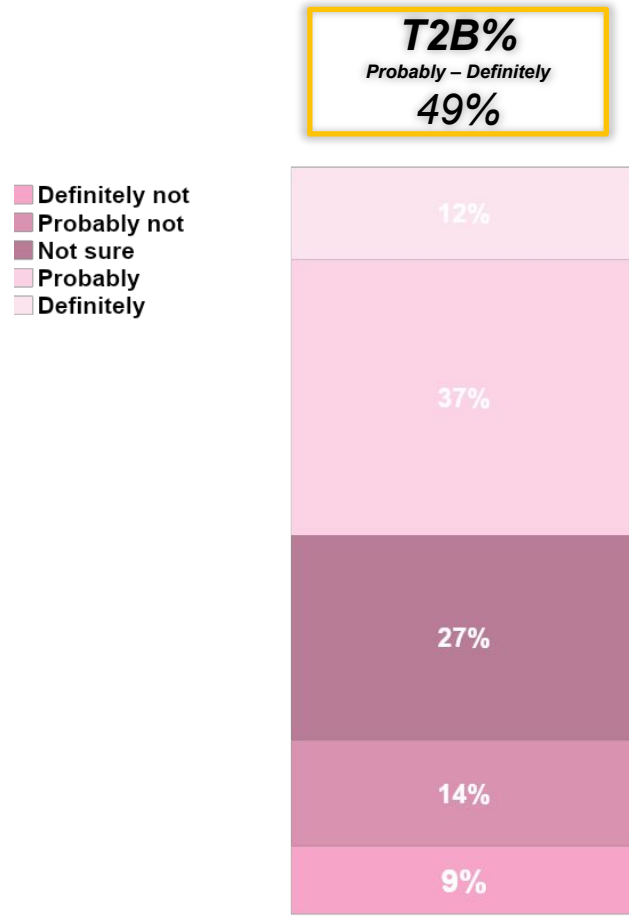


Most consumers would recommend glass and find it future proof

Around 80% of consumers mostly agree that glass is a product that fits the future and would recommend glass packaging to their friends and families. Nevertheless, only 50% would be willing to pay more for glass packaged products.

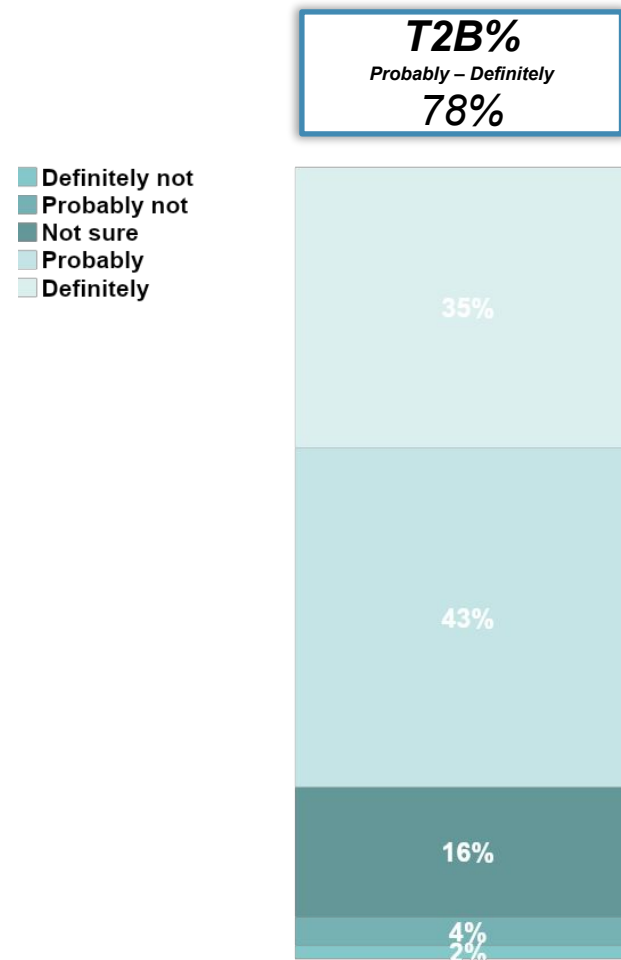


Willingness to pay more for product in glass



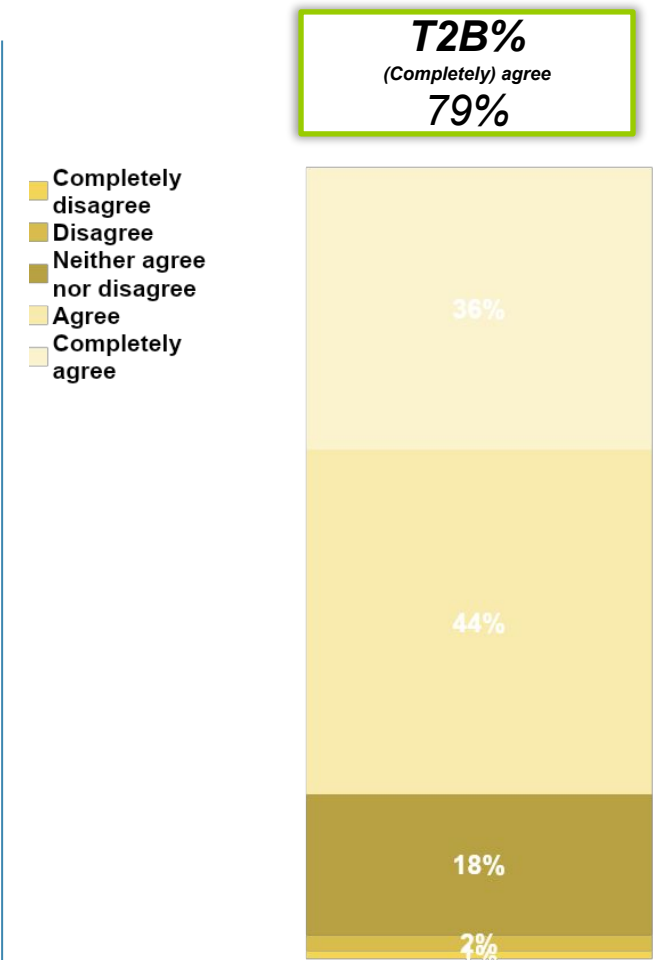
Q39: Imagine you are in a supermarket, looking to buy a specific product. In general, would you be willing to pay more for the product if it came in glass packaging? – N=4107

Recommendation of glass packaging



Q42 : Would you recommend glass as a better packaging material to friends and family?
- N=4107

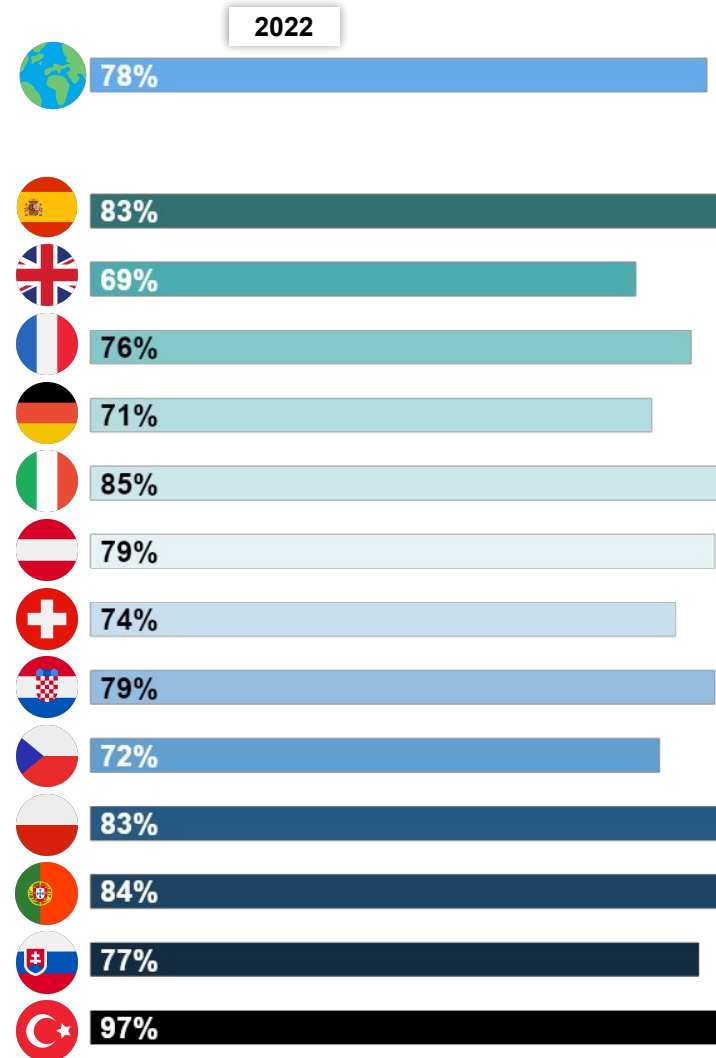
Glass as a future proof material



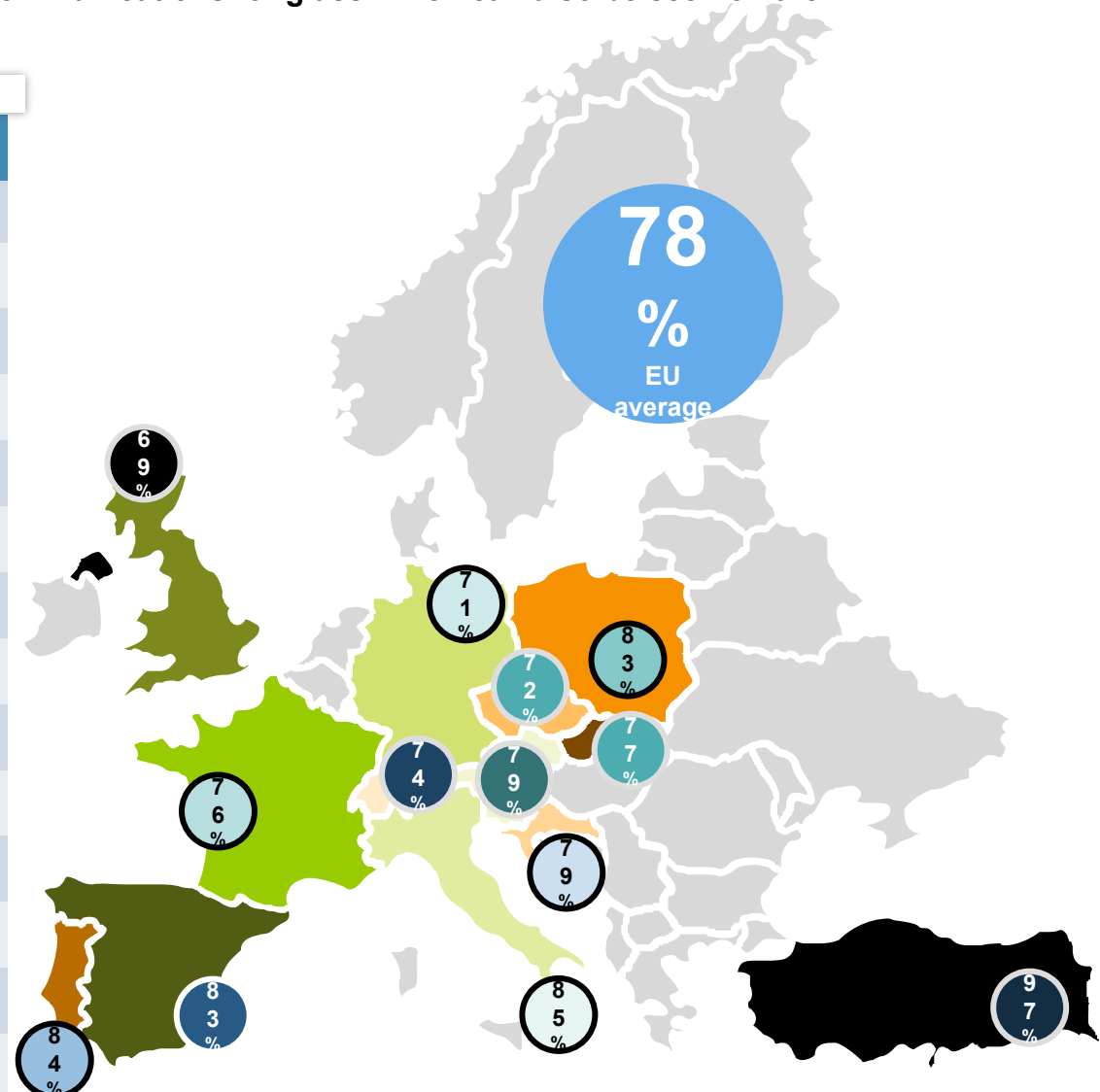
Q44 :To what extent do you agree that glass is a material that is fit for the future? - N=4107

Glass recommendation across waves and countries

More than three quarters of Europeans would recommend glass to friends and family, however despite achieving relatively high scores, these results are the lowest when comparing to all past waves, with the biggest drops recorded in Slovakia, Czech Republic, Switzerland and Germany. This drop is related to the decrease in marketing campaigns & communications for glass which can also be seen on the next slide.

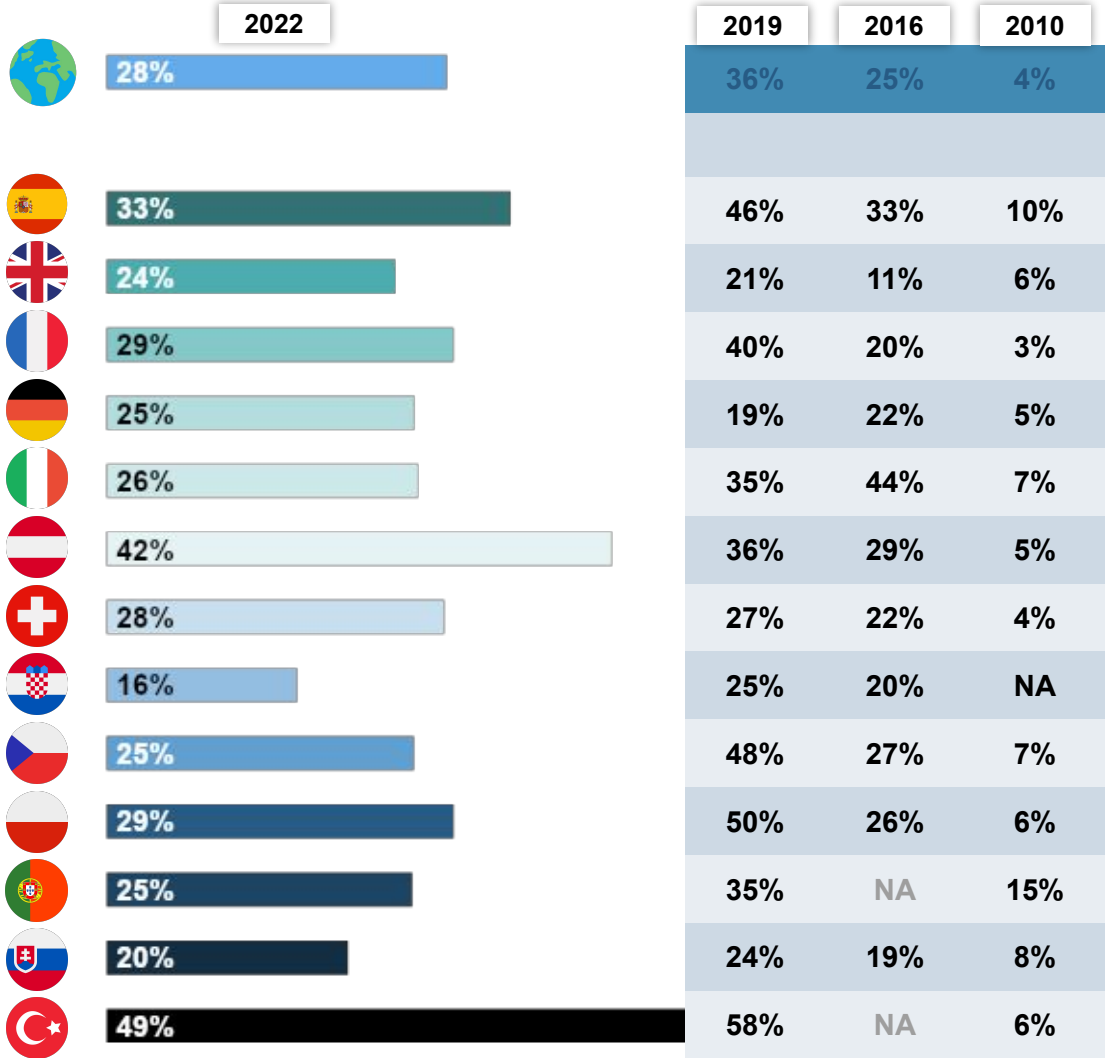


	2019	2016	2014
EU average	91%	82%	87%
Spain	92%	83%	91%
United Kingdom	82%	64%	68%
France	90%	80%	86%
Germany	84%	78%	79%
Italy	96%	88%	97%
Austria	90%	84%	82%
Switzerland	89%	78%	81%
Croatia	94%	90%	95%
Czech Republic	91%	87%	91%
Poland	91%	85%	96%
Portugal	93%	N.A.	N.A.
Slovakia	94%	90%	95%
Turkey	99%	N.A.	N.A.



More than a quarter was exposed to glass campaigns

28% of respondents claim having seen campaigns promoting glass as better packaging alternatives for food & beverages. This wave records a decrease (-8 pts vs 2019). Austria is the only country recording higher numbers than the previous wave, and Turkey maintains its top exposure position from last wave.



There is a **positive and significant correlation** between **campaign exposure** and **recommendation**, which explains the drop in glass recommendation in 2022 vs previous years

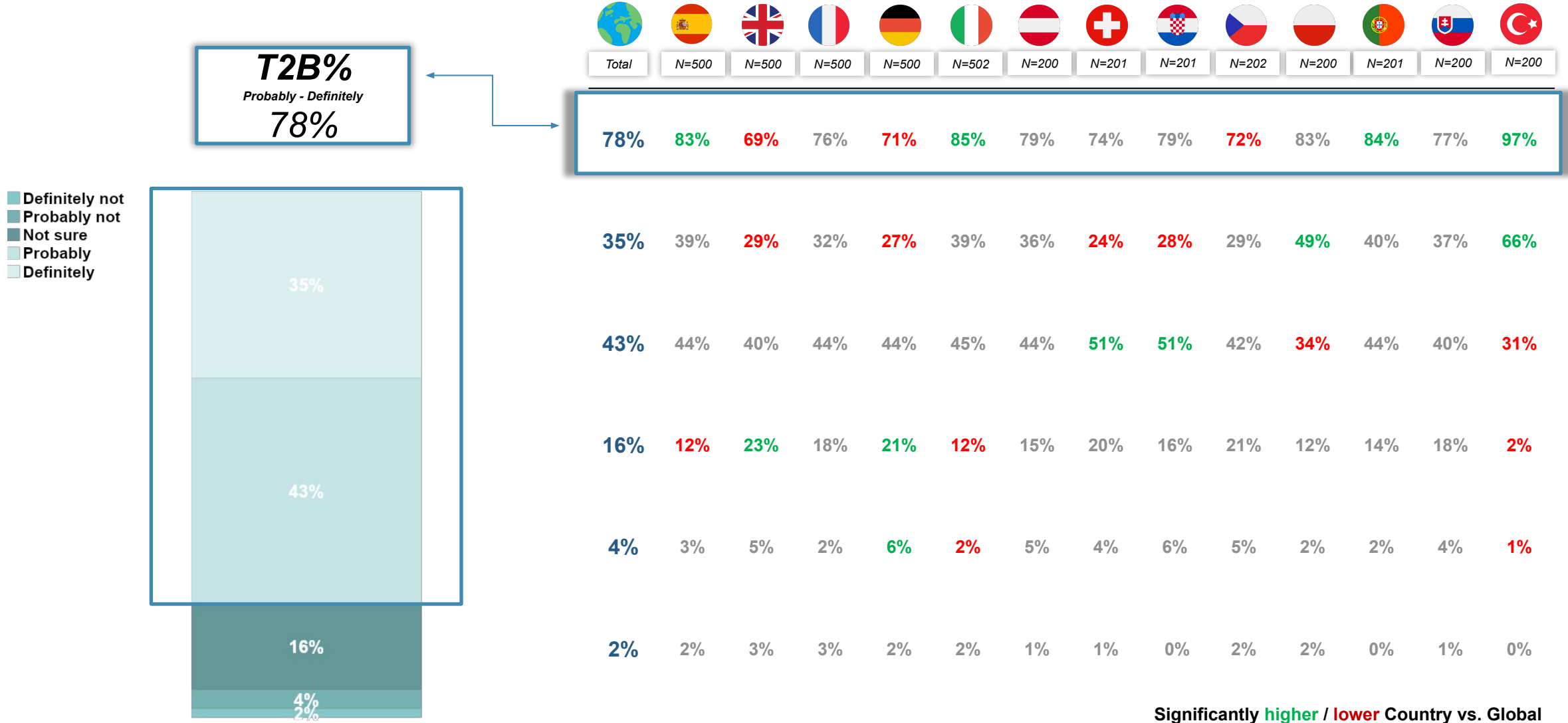
Correlation: 0,153



Q43: In the last 3 years, have you noticed any campaigns promoting glass packaging as a better alternative compared to other forms of packaging for food and beverages? - N=4107

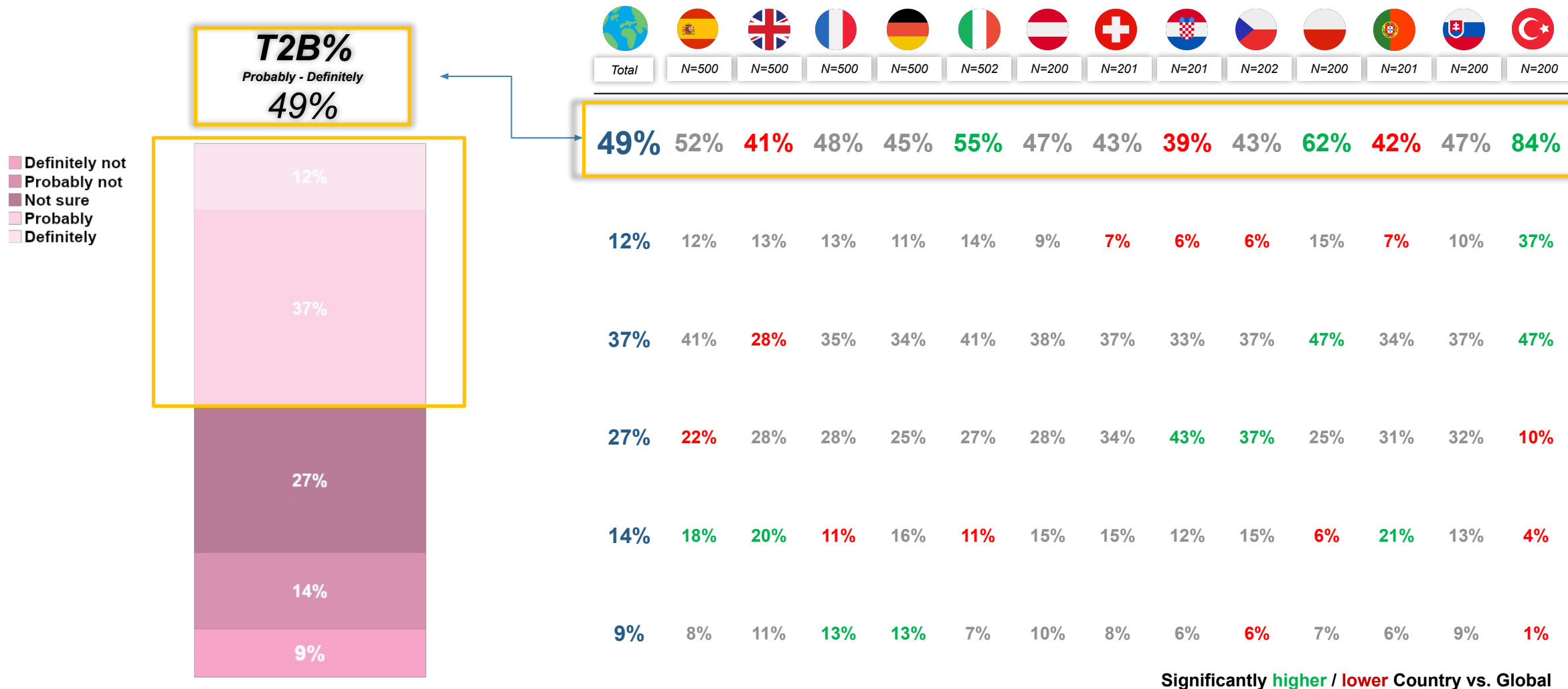
Recommendation of glass packaging

Around 80% of consumers would recommend glass packaging to friends and family, especially in Italy, Spain, Portugal and Turkey. In Portugal, previous results suggest that they prefer glass but still they are less willing to pay more for it.



Willingness to pay more for glass packaging

Around 50% of consumers would pay more for a product on glass packaging. This is particularly true for consumers in Poland and in Turkey. For Turkey, this is consistent with a lower price sensitivity as factor to encourage purchases of more products in glass.



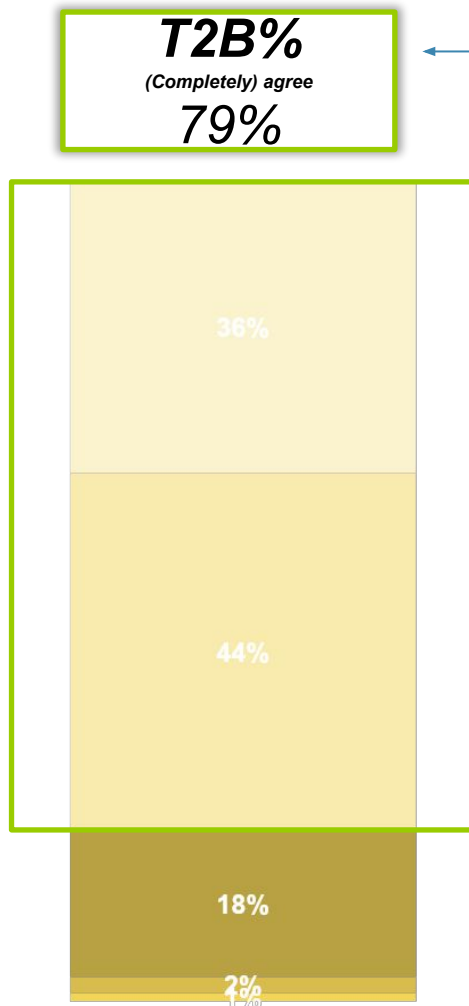
Q39: Imagine you are in a supermarket, looking to buy a specific product. In general, would you be willing to pay more for the product if it came in glass packaging? - N=4107

Glass as a future proof material

8 out of 10 consumers agree that glass is a material that is fit for the future, especially in Spain and Turkey.



- Completely disagree
- Disagree
- Neither agree nor disagree
- Agree
- Completely agree

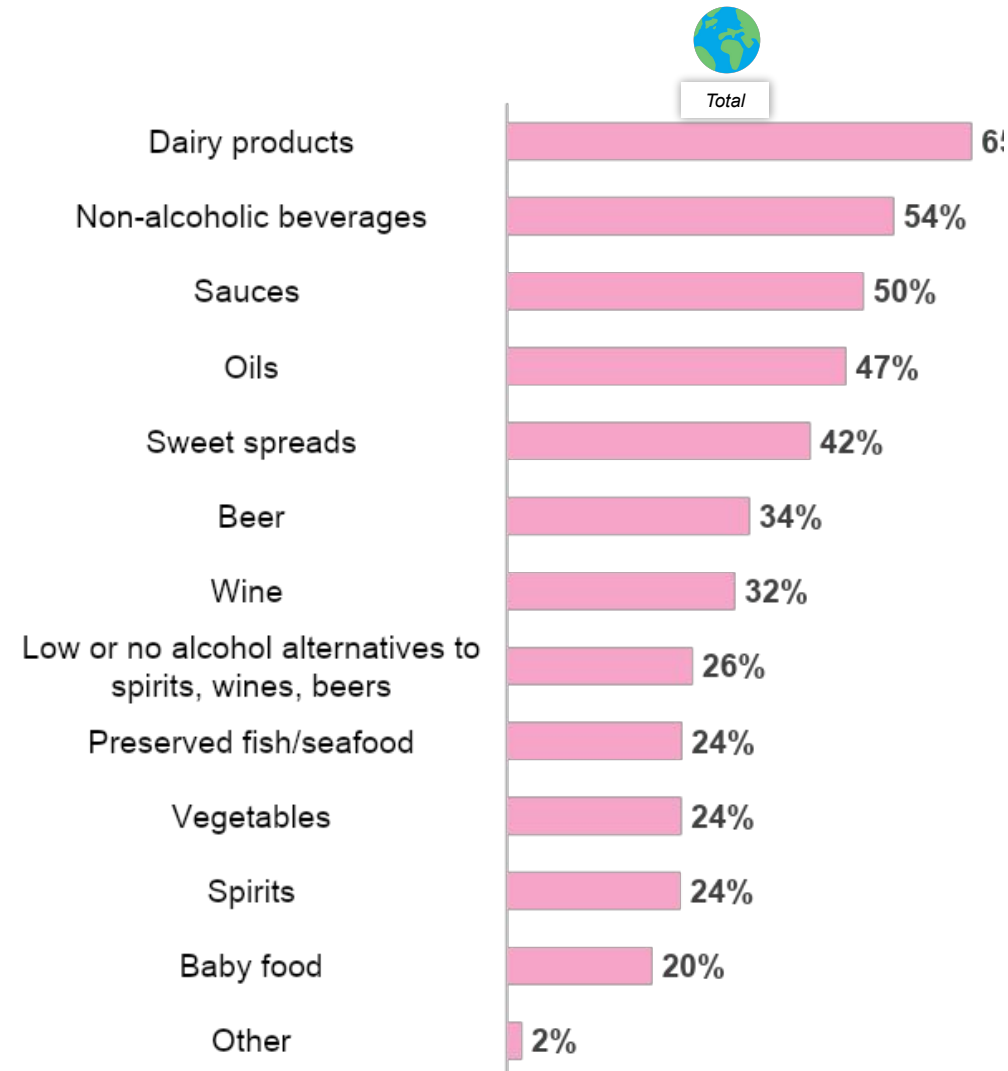


Total	Spain	UK	France	Germany	Italy	Austria	Switzerland	Croatia	Czechia	Poland	Portugal	Slovakia	Turkey
N=500	N=500	N=500	N=500	N=500	N=502	N=200	N=201	N=201	N=202	N=200	N=201	N=200	N=200
79%	86%	76%	76%	75%	81%	80%	83%	74%	78%	72%	83%	78%	94%
36%	43%	31%	36%	35%	38%	40%	28%	27%	28%	30%	32%	30%	62%
44%	43%	45%	40%	40%	42%	40%	56%	47%	51%	42%	51%	47%	32%
18%	12%	19%	21%	22%	17%	18%	15%	23%	20%	22%	16%	20%	4%
2%	2%	3%	2%	2%	1%	2%	1%	2%	1%	4%	1%	0%	1%
1%	0%	2%	1%	1%	1%	0%	1%	0%	0%	1%	0%	2%	1%

Significantly **higher** / **lower** Country vs. Global

Glass packaging products preferences

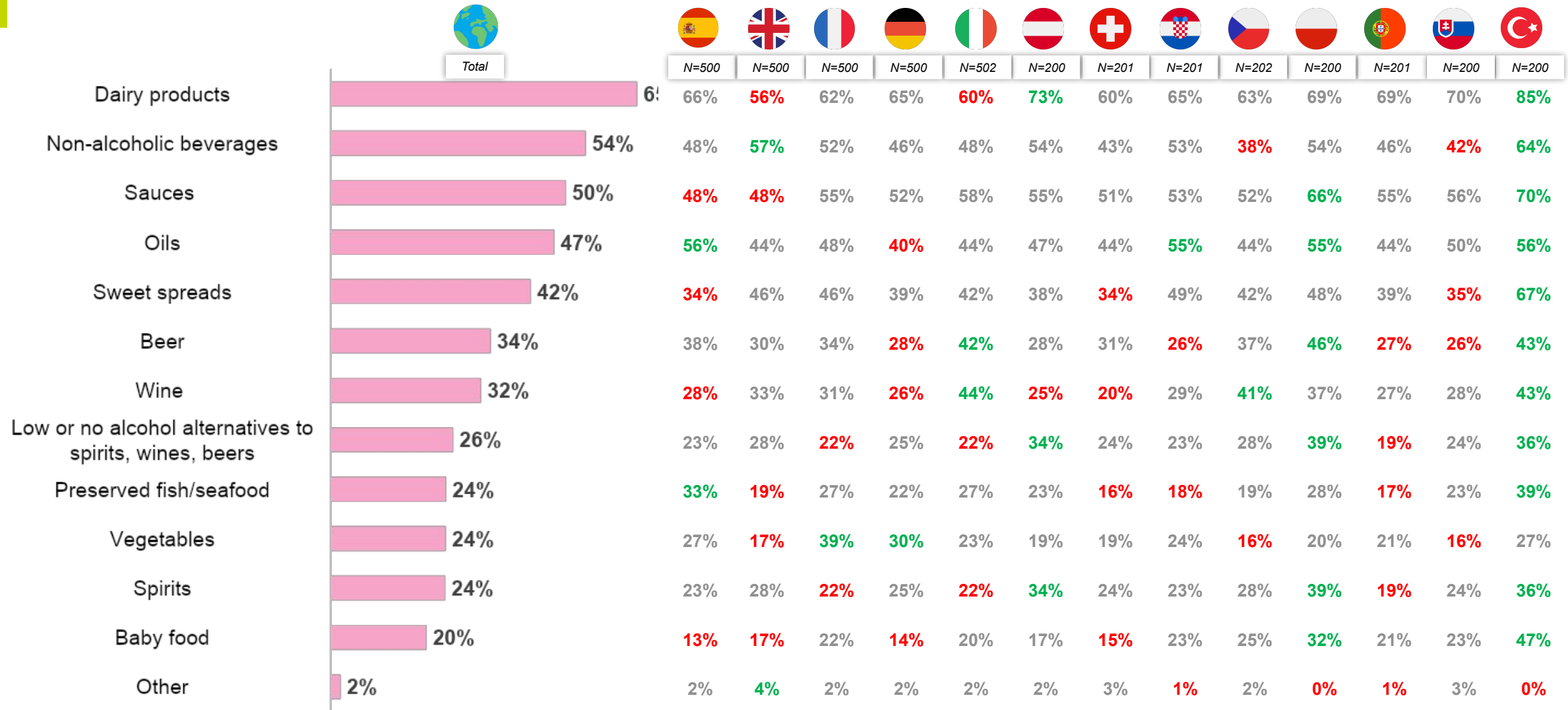
The majority of consumers would like to see dairy products in glass packaging, especially in Turkey and Austria. This is followed by nonalcoholic beverages, sauces, and oils. Interesting to see that in Portugal, they praise the glass but still they are less willing to put more money into it



Q11: Which of the following product categories would you like to find (more) in glass packaging on shelves in a store? - N=4107

Glass packaging products preferences

The majority of consumers would like to see dairy products in glass packaging, especially in Turkey and Austria. This is followed by nonalcoholic beverages, sauces, and oils. Interesting to see that in Portugal, they praise the glass but still they are less willing to put more money into it



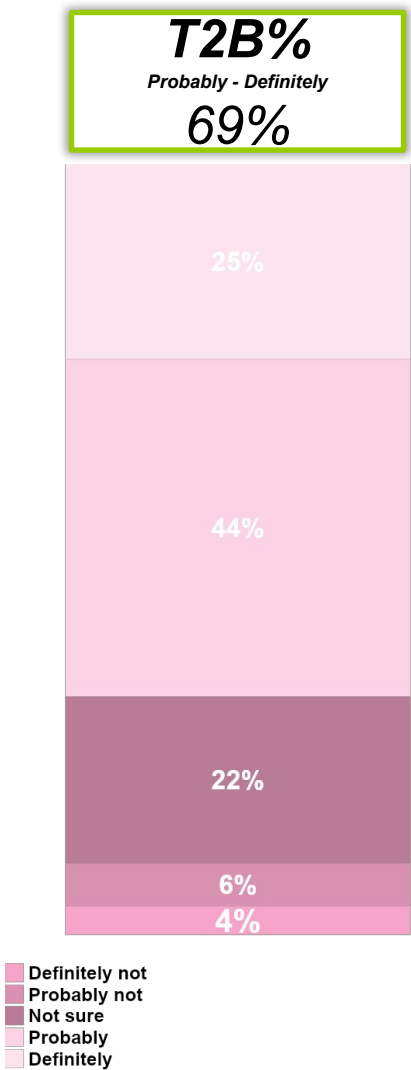
Significantly higher / lower Country vs. Global

Q11: Which of the following product categories would you like to find (more) in glass packaging on shelves in a store? - N=4107

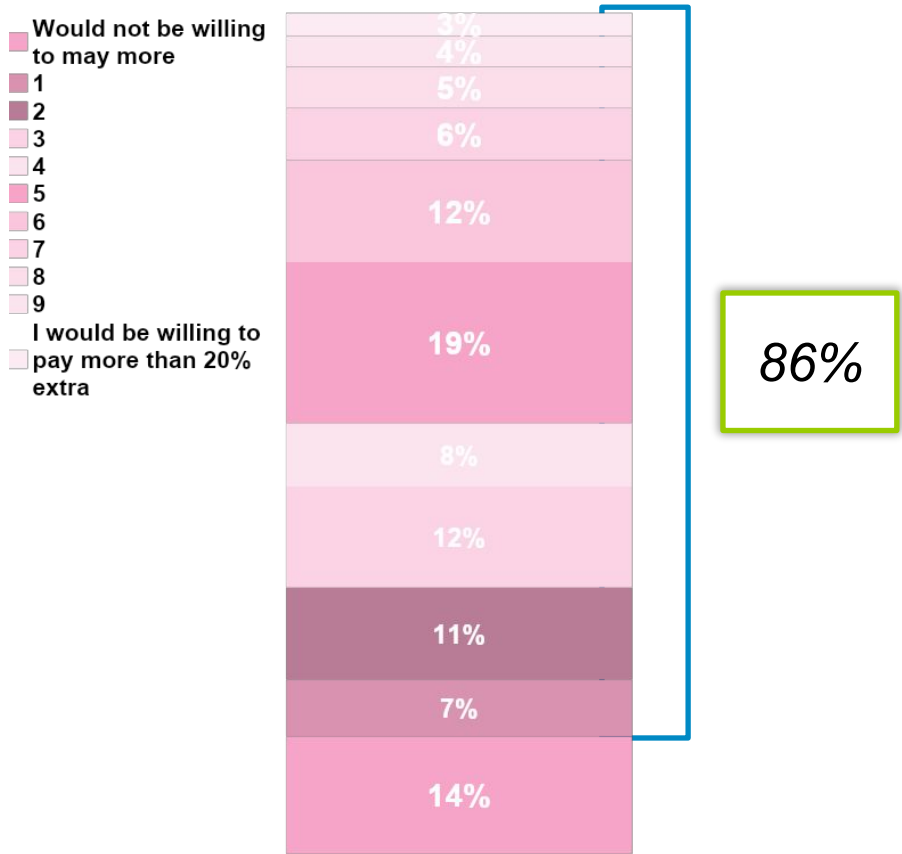
Zoom in on Austria

7 out of 10 consumers in Austria report that they would be more likely to buy glass packaged products if this packaging was done in Austria.

86% would be willing to pay more for this “made in Austria” product.



Q40 : Austria - To what extent would you be more inclined to buy for a product in glass packaging, if the product and packaging was made in Austria? - N=200



Q41 : How much would you be willing to pay extra for such a 'made in Austria' product? - N=200

ATTITUDES TOWARDS SUSTAINABILITY



InSites Consulting





KEY CONCLUSIONS

Sustainability is a topic that respondents care about and have a moral obligation towards

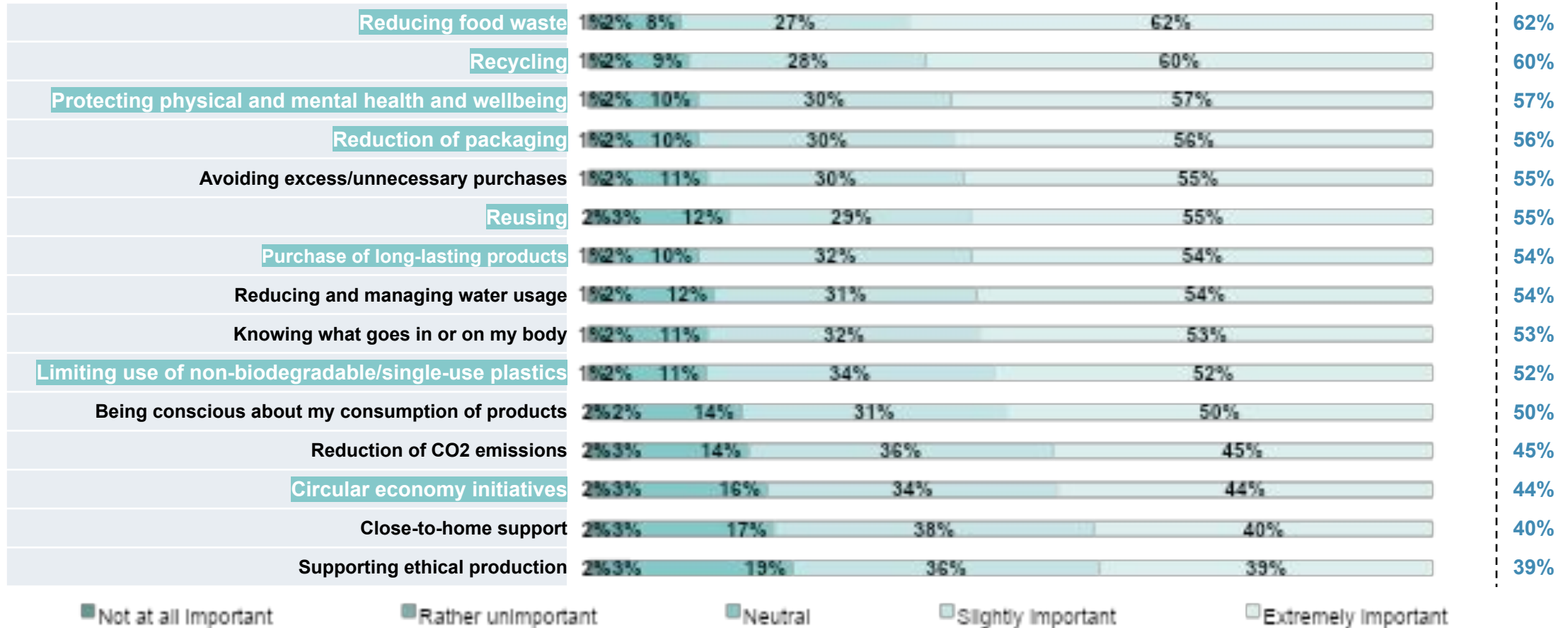
- **Sustainability** is seen as a broad subject. Yet, the most sensitive points of sustainability revolve around **reducing food waste** and **increasing recycling**.
- In some countries it seems the topic of sustainability is more active than others, such as **Turkey, Portugal and Poland**.
- In other countries such as UK and Germany, the results are lower, which **which could also suggest a more advanced and nuanced understanding of the debate** in those markets.
- **Companies have a responsibility towards sustainable packaging** and should clearly **mention how the packaging is being recycled** after usage.



Consumers consider a variety of sustainability factors as highly important

6 out of 10 consumers consider reducing food waste, recycling and protecting physical and mental health and wellbeing as the top three sustainability elements in their everyday life. However, other factors are also relevant, with at least half of the respondents finding each of the statements extremely important.

T1B%*
Extremely Important



Q14: Sustainability can cover a wide range of behaviours, from environmental issues to social and economic factors. Below, we will present you with some topics related to sustainability. Please indicate how important each of these elements are to you in your everyday life. - N=4107

* For sustainability-related questions, we look at the T1B% to compensate for social bias

Importance of sustainability elements *by country*

Consumers in Turkey, Portugal, Poland, and Spain are much more engaged with the sustainability topics. Scores are still high, but lower than average in France, Germany, Switzerland and the Czech Republic and Germany, which could also suggest a more advanced and nuanced understanding of the debate.



T1B%

Extremely important

														
	Total	N=500	N=500	N=500	N=500	N=502	N=200	N=201	N=201	N=202	N=200	N=201	N=200	N=200
Reducing food waste	62%	63%	59%	53%	55%	59%	66%	63%	69%	51%	80%	85%	58%	82%
Recycling	60%	64%	61%	50%	49%	61%	53%	54%	68%	49%	71%	83%	64%	69%
Protecting physical and mental health and wellbeing	57%	68%	53%	51%	46%	58%	56%	46%	61%	37%	64%	74%	56%	77%
Reduction of packaging	56%	62%	57%	50%	48%	53%	61%	48%	61%	43%	67%	72%	54%	70%
Reducing and managing water usage	55%	62%	52%	49%	43%	54%	43%	43%	65%	38%	71%	82%	58%	79%
Limiting use of non-biodegradable/single-use plastics	55%	66%	52%	50%	39%	61%	45%	37%	57%	47%	65%	76%	57%	70%
Avoiding excess/unnecessary purchases	54%	62%	55%	49%	45%	53%	54%	42%	57%	33%	61%	67%	59%	76%
Knowing what goes in or on my body?	54%	63%	52%	48%	42%	56%	49%	46%	69%	31%	51%	68%	61%	76%
Reusing	53%	63%	51%	42%	45%	50%	49%	43%	60%	44%	65%	77%	64%	68%
Purchase of long-lasting products	52%	58%	51%	50%	50%	42%	46%	41%	56%	35%	63%	64%	50%	74%
Reduction of CO2 emissions	50%	60%	47%	44%	42%	51%	40%	34%	58%	30%	57%	78%	53%	69%
Being conscious about my consumption of products	45%	51%	41%	35%	39%	43%	42%	35%	53%	30%	57%	64%	55%	68%
Circular economy initiatives	44%	55%	44%	32%	38%	44%	39%	36%	54%	31%	53%	64%	47%	56%
Close-to-home support	40%	47%	37%	31%	36%	38%	43%	33%	52%	25%	48%	45%	40%	60%
Supporting ethical production	39%	46%	41%	31%	28%	37%	26%	28%	47%	18%	48%	61%	39%	72%

Significantly **higher** / **lower** Country vs. Global

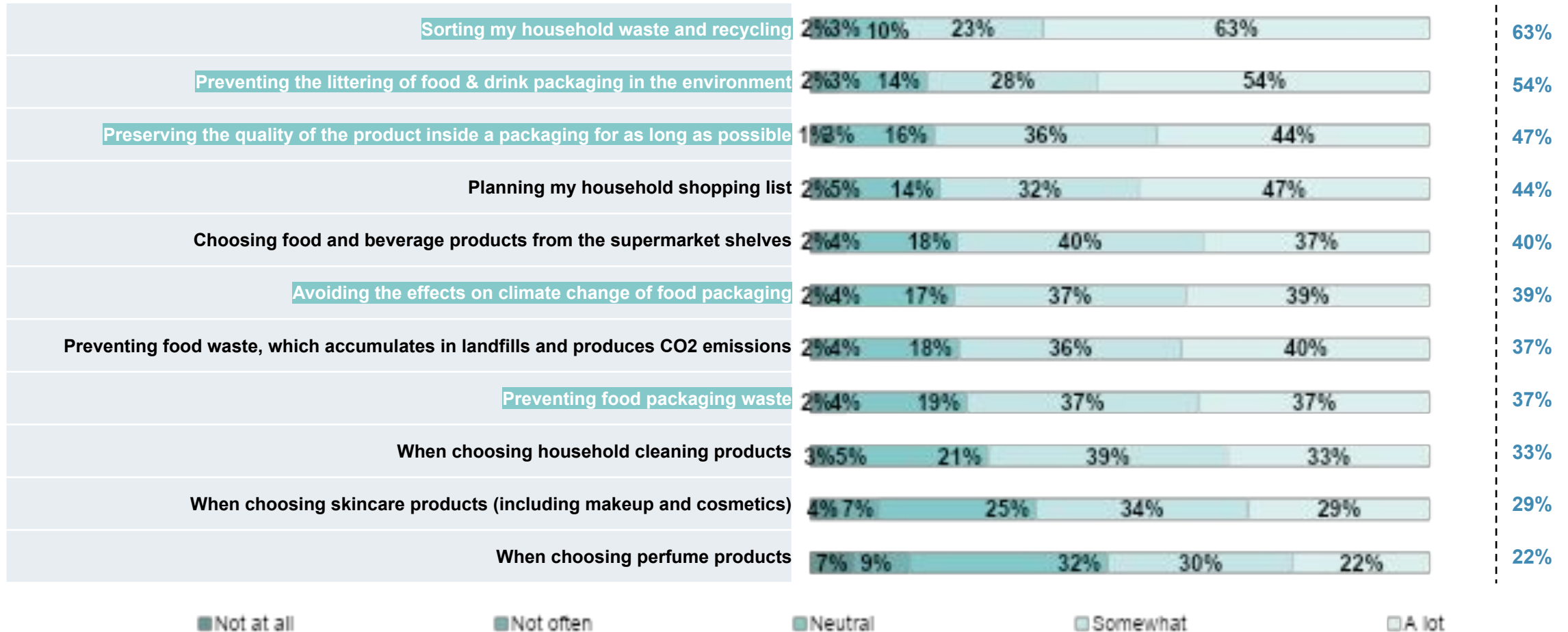
Q14: Sustainability can cover a wide range of behaviours, from environmental issues to social and economic factors. Below, we will present you with some topics related to sustainability. Please indicate how important each of these elements are to you in your everyday life - .N=4107

Sustainability acts in daily life

Almost two third of consumers report sorting household waste and recycling to contribute to sustainable practices, and half of consumers prevent littering, and prolongate the life of the product inside packaging for as long as possible. It is interesting to note that behaviours towards sustainability also take place during the shopper journey, when choosing food & beverages.



T1B%
A lot



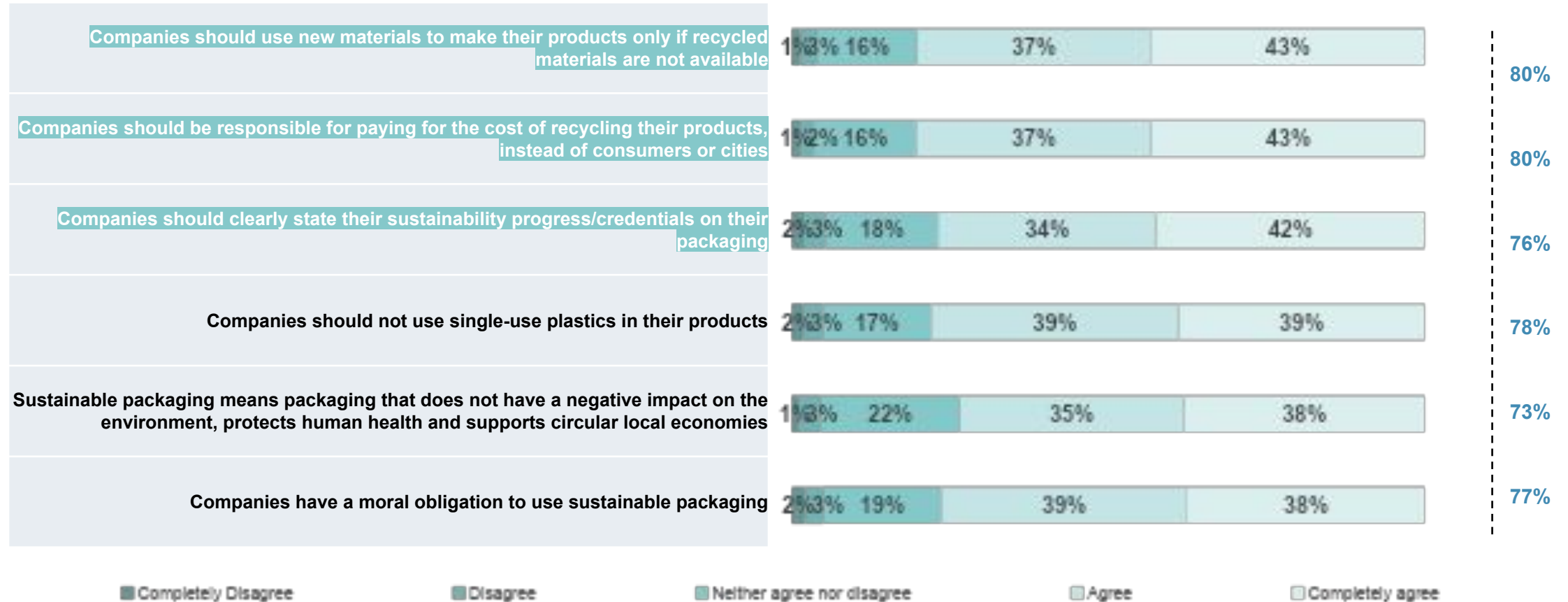
Q15: To what extent do you try to act sustainably for the following activities? - N=4107

Defining sustainability and companies' responsibilities

8 out of 10 respondents consider that companies have a moral obligation to use sustainable packaging and should clearly have sustainability credentials on their packaging.



T2B%
Completely agree



Defining sustainability and companies' responsibilities *by country*

Consumers in Portugal, Spain, and Turkey higher results on almost all statements, while consumers in Switzerland and Czech Republic achieve significantly lower results on almost all statements



T2B%

(Completely) agree

														
	Total	N=500	N=500	N=500	N=500	N=502	N=200	N=201	N=201	N=202	N=200	N=201	N=200	N=200
Sustainable packaging means packaging that does not have a negative impact on the environment, protects human health and supports circular local economies	80%	84%	80%	74%	72%	88%	78%	74%	85%	80%	85%	81%	82%	87%
Companies have a moral obligation to use sustainable packaging	80%	83%	80%	81%	74%	85%	78%	75%	79%	70%	82%	90%	80%	84%
Companies should clearly state their sustainability progress/credentials on their packaging	78%	85%	79%	77%	71%	84%	70%	70%	73%	59%	85%	89%	75%	89%
Companies should not use single-use plastics in their products	77%	83%	75%	80%	70%	76%	77%	69%	72%	76%	78%	83%	81%	81%
Companies should use new materials to make their products only if recycled materials are not available	76%	78%	76%	80%	70%	77%	74%	66%	76%	71%	84%	79%	79%	86%
Companies should be responsible for paying for the cost of recycling their products, instead of consumers or cities	74%	75%	71%	76%	68%	78%	69%	64%	79%	66%	81%	77%	71%	82%

Sustainability credentials – applied to consumers' daily life

8 out of 10 consumers consider that brands have a responsibility towards sustainable and healthy packaging, believing it makes a difference for our planet.



T2B%
Completely agree



Sustainability credentials – applied to consumers' daily life *by country*



T2B%

(Completely) agree

														
	Total	N=500	N=500	N=500	N=500	N=502	N=200	N=201	N=201	N=202	N=200	N=201	N=200	N=200
It is the responsibility of brands to ensure that food packaging in stores is free from chemicals that could be harmful to my health	82%	87%	81%	81%	74%	86%	83%	77%	85%	78%	83%	89%	86%	89%
Purchasing sustainable brands or products makes a difference for our environment	76%	79%	75%	74%	70%	81%	73%	75%	76%	64%	83%	89%	71%	91%
It is the responsibility of governments to ensure that food packaging in stores is free from chemicals that could be harmful to my health	75%	85%	71%	69%	67%	85%	72%	64%	79%	69%	70%	82%	78%	85%
I feel better when I buy sustainable brands or products	68%	71%	68%	65%	58%	75%	63%	61%	72%	56%	73%	77%	62%	90%
If a packaged food or drink product is available on the market, I assume that it is safe to consume and free from chemicals that could be harmful to my health	62%	67%	67%	54%	58%	61%	56%	47%	55%	77%	65%	61%	67%	69%
I take into account packaging claims and labels that indicate a sustainable product	61%	64%	61%	62%	49%	73%	46%	48%	50%	52%	67%	64%	63%	88%
I understand what packaging labels that indicate a sustainable product mean	61%	62%	55%	58%	50%	72%	52%	50%	58%	53%	70%	72%	59%	85%
I have purchased brands/products specifically because of their sustainability practices	56%	62%	53%	70%	48%	66%	41%	45%	40%	43%	56%	54%	36%	83%
I am happy to pay more for sustainable brands/products	47%	50%	45%	46%	41%	52%	37%	40%	46%	40%	54%	45%	42%	77%
I find packaging labels that indicate a sustainable product purely marketing	46%	54%	46%	54%	43%	44%	34%	35%	55%	39%	48%	34%	41%	51%
I have avoided brands/products because I disagreed with their sustainability practices	45%	54%	42%	54%	44%	49%	41%	30%	37%	33%	44%	55%	30%	45%
I have researched brands to ensure they do what they say they will do when it comes to sustainability	42%	47%	39%	43%	38%	49%	30%	25%	34%	25%	51%	42%	41%	82%
I find packaging labels that indicate a sustainable product misleading	40%	53%	45%	50%	35%	40%	23%	30%	46%	33%	35%	29%	34%	38%

Q17: Now thinking about yourself, to what extent do you agree with the following statements? - N=4107

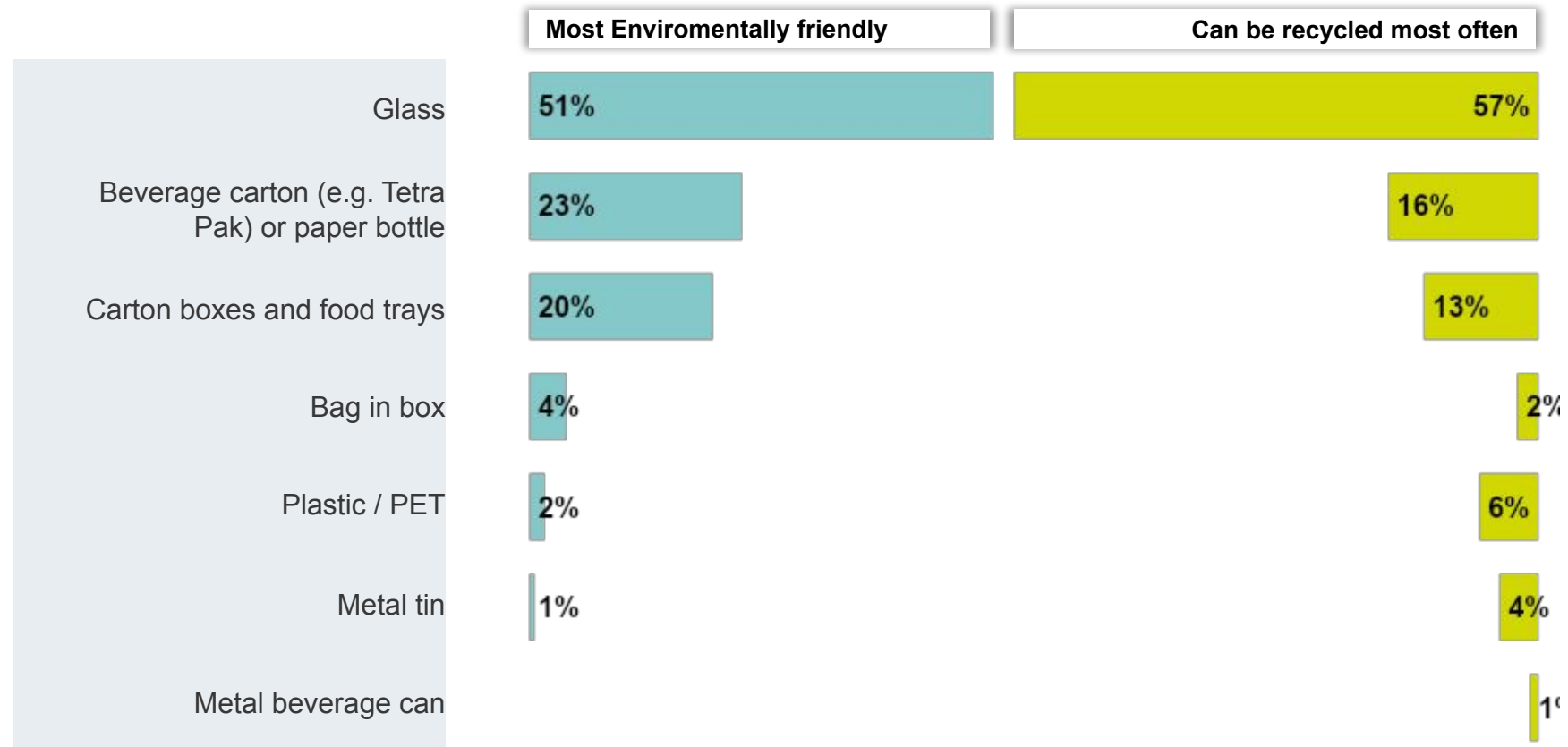
Significantly **higher** / **lower** Country vs. Global

Zoom in on Portugal

Portuguese consumers rank glass by far as the most environmentally friendly and the easiest recycled product.



Most recyclable packaging material



HEALTH & PRODUCT PRESERVATION



InSites Consulting



KEY CONCLUSIONS

Glass is seen as a safe and healthy pack material, especially in the context of recycled material

- **A third of consumers** agrees that glass as packaging material helps to **prevent several sustainability and health-related issues**.
- Glass is even seen as the best material for **preventing effects on climate change**.
- **Plastic and PET bottles** are also seen as a good alternative (often even outperforming glass), but **not in the context of recycled material**.
- When recycled, glass is seen as the safest material. As such, **glass offers the best of both worlds**.



Plastic and Glass are seen as the best materials for health and environmental reasons, with plastic often taking the lead

Glass still is perceived as the best fit for preventing climate change, manifesting it's future-proof image.

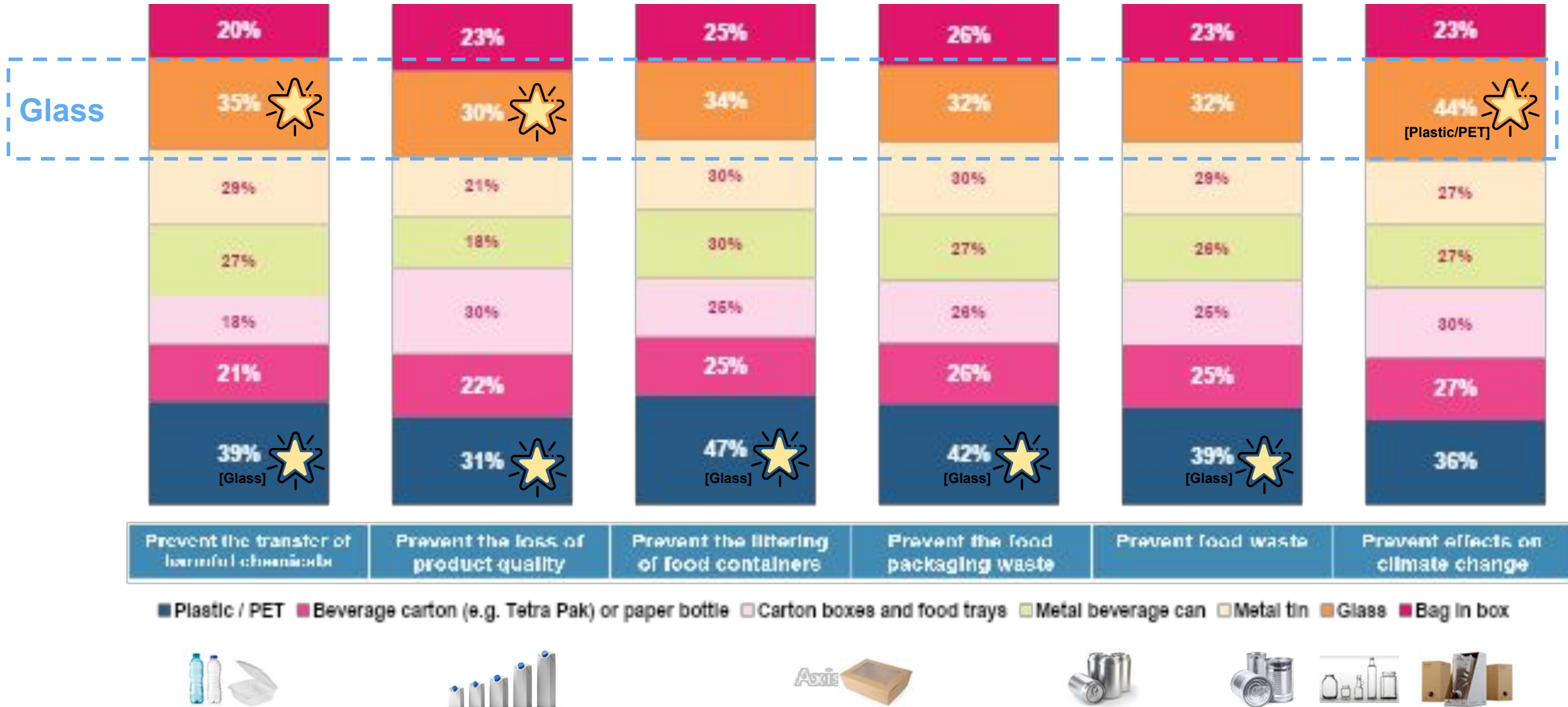


Prevent the transfer of harmful chemicals	Prevent the loss of product quality	Prevent the littering of food containers	Prevent the food packaging waste	Prevent food waste	Prevent effects on climate change
39% Consider PLASTIC/PET as best solution vs. 35% considering GLASS	31% Consider PLASTIC/PET as best solution vs. 30% considering GLASS	47% Consider PLASTIC/PET as best solution vs. 34% considering GLASS	42% Consider PLASTIC/PET as best solution vs. 32% considering GLASS	39% Consider PLASTIC/PET as best solution vs. 32% considering GLASS	44% Consider GLASS as best solution vs. 36% considering PLASTIC/PET

Q20: Which of the following packaging solutions do you think best helps to prevent the following issues? - N=666

Most consumers consider that plastic can help prevent most health and environmental issues

Although glass is seen as a packaging solution that can prevent many health and environmental issues, most consumers consider plastic/PET to be equally or sometimes better suited in this regard. An explanation for this could be because PET packaging is used almost on a daily basis and increased communication focuses on its recyclability.



Results of glass in ranking best packaging solution

One third of respondents consider that glass is the best packaging solution to prevent health and ecological hazards

Consumers in Portugal rank glass highest, while Czech consumers have a significantly lower association. Glass against climate change is particularly scoring in Turkey, Slovakia, Portugal and Austria.

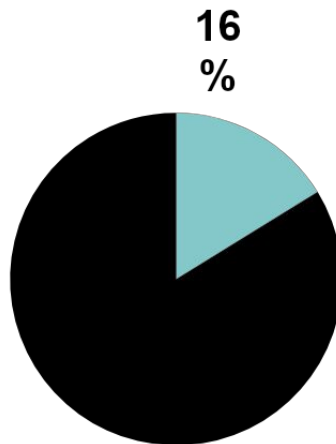


Association with Glass	Total	 N=500	 N=500	 N=500	 N=500	 N=502	 N=200	 N=201	 N=201	 N=202	 N=200	 N=201	 N=200	 N=200
Transfer of harmful chemicals from the packaging into a food or drink product	35%	33%	38%	33%	37%	37%	38%	33%	40%	25%	27%	40%	30%	28%
The loss of product quality after a short while	30%	30%	29%	35%	34%	31%	35%	25%	32%	15%	25%	39%	22%	22%
Littering of food containers in the environment (e.g. ocean, landscapes), which then leach harmful chemicals and microorganisms into human or animal health	34%	34%	32%	34%	33%	36%	38%	32%	32%	31%	30%	38%	28%	34%
Food packaging waste, which accumulates in landfills and produces CO2 emissions	32%	35%	32%	33%	35%	34%	36%	26%	31%	25%	27%	37%	24%	33%
Food waste, which accumulates in landfills and produces CO2 emissions	32%	33%	32%	32%	32%	36%	37%	27%	29%	17%	28%	39%	24%	32%
Effects on climate change of food packaging (e.g. production, reusability and recyclability)	44%	38%	38%	42%	45%	43%	52%	39%	54%	43%	47%	52%	44%	57%
AVERAGE	35%	34%	34%	35%	36%	36%	39%	30%	36%	26%	31%	41%	29%	34%

Significantly **higher** / **lower** Country vs. Global

Q20: Which of the following packaging solutions do you think best helps to prevent the following issues? - N=666

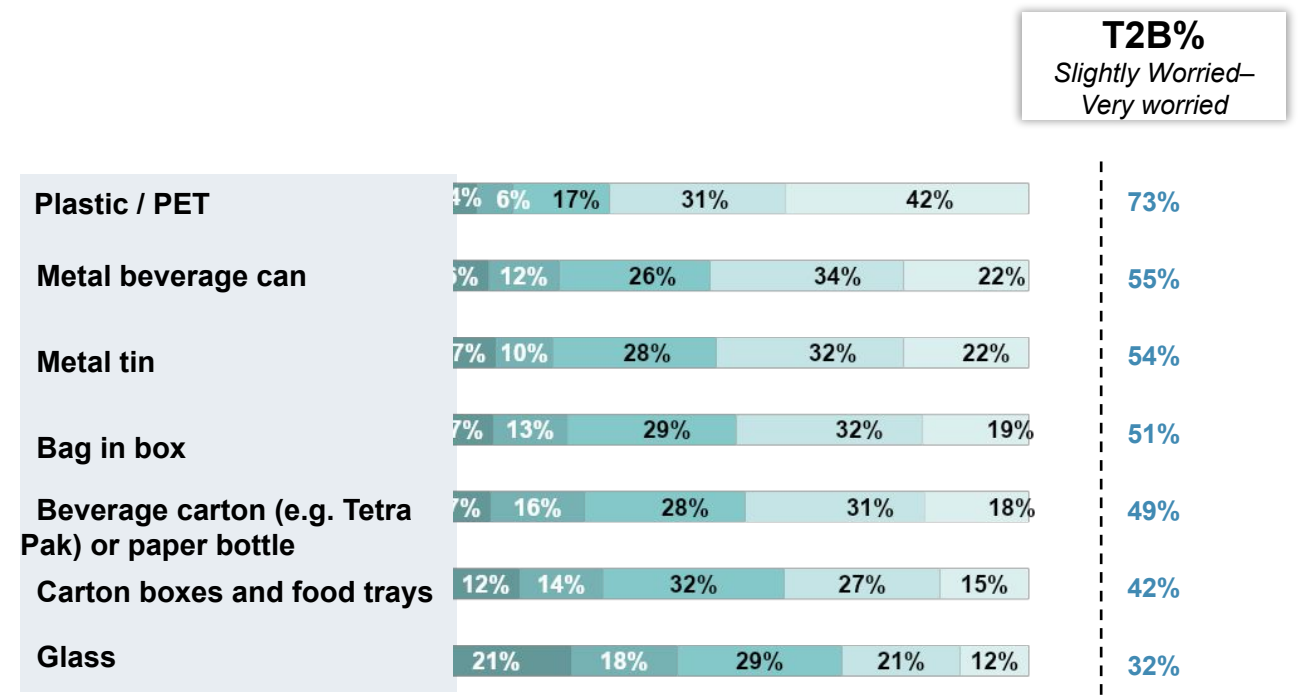
16% of Europeans consider packaging produced with recycled material a danger for public health



Q18: Do you consider that packaging produced with recycled material is a danger for public health? - N=4107

Recycled Plastic is much more concerning than glass

7 out of 10 Europeans are worried about the health hazards of recycled Plastic/PET. Only 3 out of 10 Europeans are worried about the potential health hazards of recycled glass.



Q19 Which packaging materials are you particularly concerned about in this respect? - N=666

Concerns of recycled packaging material *by country*

Consumers in France, Germany and Turkey consider recycled packaging material more dangerous than the European average. Glass is seen as relatively save across all markets.



T2B%
(Very) worried

														
	Total	N=62	N=93	N=109	N=100	N=58	N=30	N=36	N=26	N=31	N=18	N=17	N=40	N=48
% considering recycled packs dangerous	16%	12%	19%	22%	20%	12%	15%	18%	13%	15%	9%	8%	20%	24%
Plastic / PET	73%	72%	74%	68%	73%	71%	64%	54%	89%	72%	83%	75%	79%	87%
Metal beverage can	55%	64%	51%	59%	44%	57%	47%	51%	63%	50%	63%	75%	54%	66%
Metal tin	54%	63%	53%	59%	45%	62%	37%	41%	54%	43%	57%	69%	54%	67%
Bag in box	51%	48%	55%	68%	39%	56%	36%	50%	55%	44%	44%	40%	35%	57%
Beverage carton (e.g. Tetra Pak) or paper bottle	49%	47%	53%	56%	41%	55%	43%	50%	44%	35%	40%	34%	53%	59%
Carton boxes and food trays	42%	40%	54%	52%	38%	42%	40%	33%	30%	38%	29%	40%	26%	51%
Glass	32%	43%	34%	37%	28%	29%	35%	29%	37%	30%	17%	30%	32%	27%

Significantly **higher** / **lower** Country vs. Global

Q19 Which packaging materials are you particularly concerned about in this respect? - N=666

Low Sample size

ATTITUDES TO REUSE & RECYCLING



KEY CONCLUSIONS

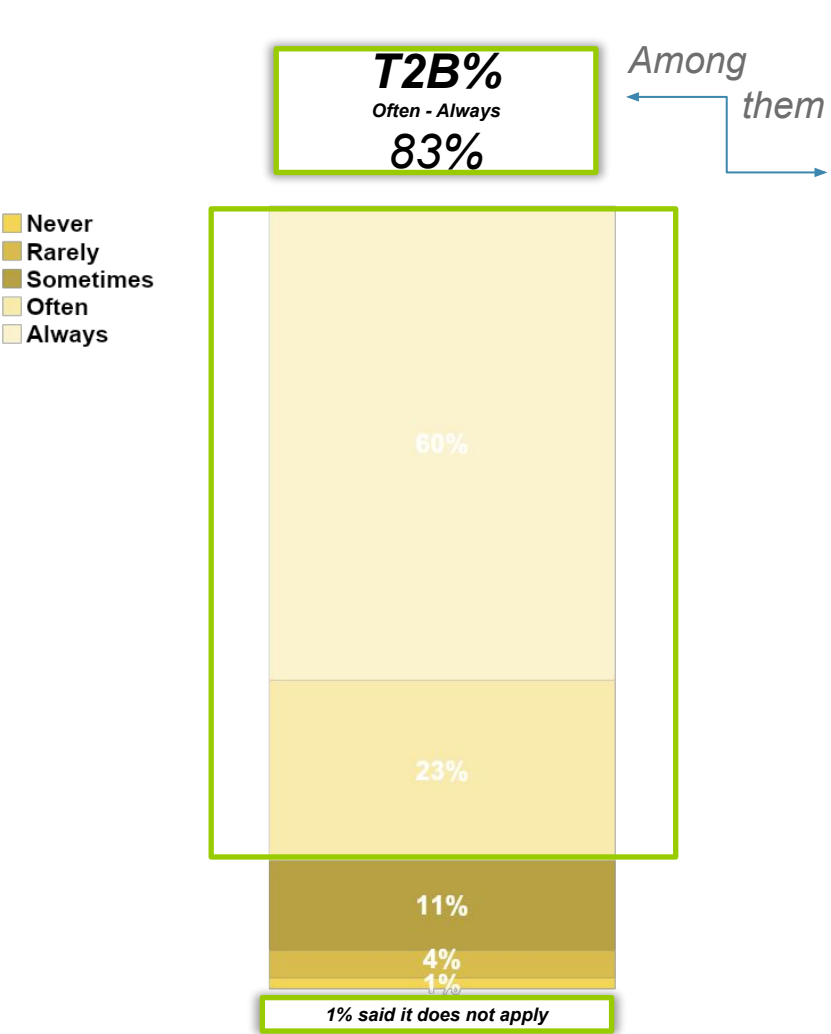
Consumers tend to recycle glass packaging. A DRS system is not necessarily preferred

- **8 out of 10** respondents **always or often recycle** glass packaging.
- Recycling is seen as key to live more **sustainable** and consumers **generally know how to do it**. Most areas also have an **efficient local collection and recycling system in place**.
- Main reason not to recycle is a **lack of convenient systems**, especially in Spain
- **8 out of 10 consumers** also believe that **glass is effectively recycled**.
- Data from the UK and Germany highlights an **interesting perception gap**: consumers generally believe that glass gets recycled (79%/78%), but are less confident that this is the case for packaging in general (22%/20%; but based on low sample)
- **Recycling glass** is seen as **easy** by almost two third of consumers.
- Only **1 out of 4 consumers** would be willing to engage in a DRS system and 1 in 5 would pay a deposit on top of packaging.

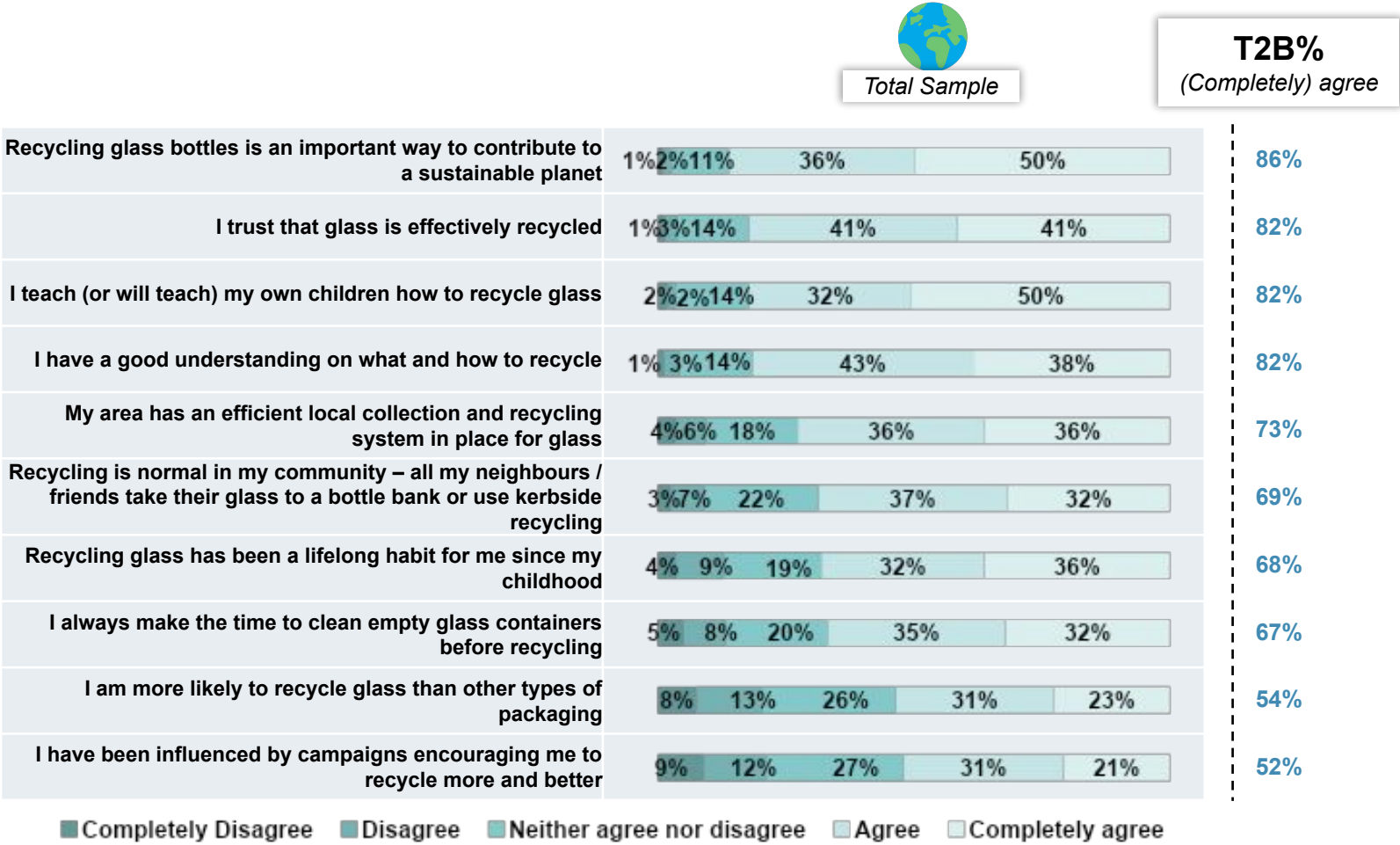


8 out of 10 consumers recycle glass packaging once they have finished using it

Almost 9 out of 10 consumers agree with the fact that recycling glass is important to a sustainable planet. Consumers also believe to understand what and how to recycle and trust that glass is effectively recycled. Importance of recycling is emphasized by the fact that they would also teach it to their children.



Q22: How often do you recycle your glass packaging once you're finished using it? - N=4107



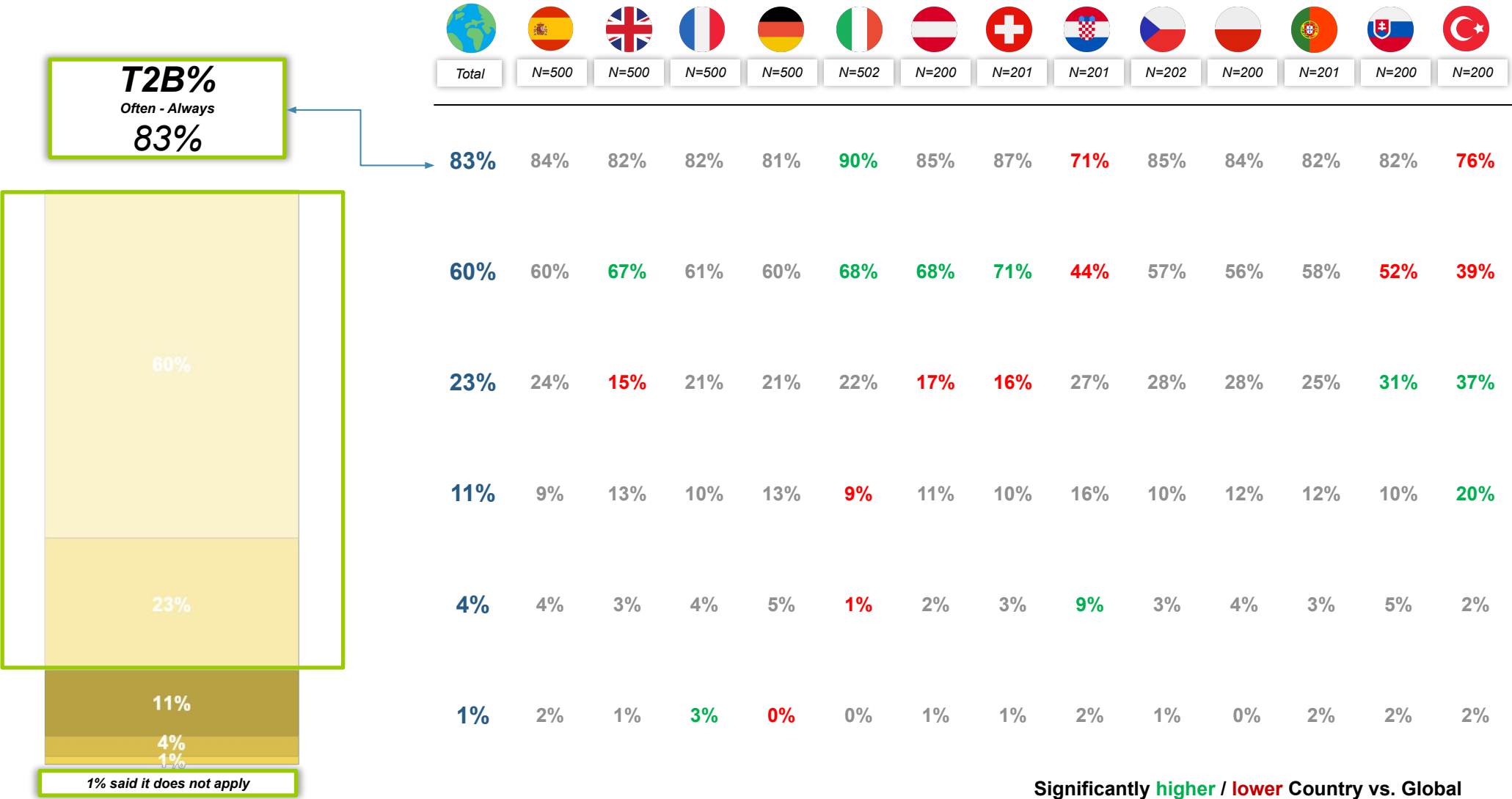
Q24: You indicated that you are likely to recycle glass packaging once you're finished using it. When it comes to efforts to recycle more, to what extent do you agree with the following statements? - N=3871

8 out of 10 consumers recycle glass packaging once they have finished using it

In Italy 9 out of 10 consumers recycle their glass packaging after using it, and only 7 out of 10 do so in Croatia.



- Never
- Rarely
- Sometimes
- Often
- Always



Q22: How often do you recycle your glass packaging once you're finished using it? By recycling glass packaging, we mean collecting and disposing glass for recycling (e.g. in a bottle bank or via kerbside collection). - N=4107

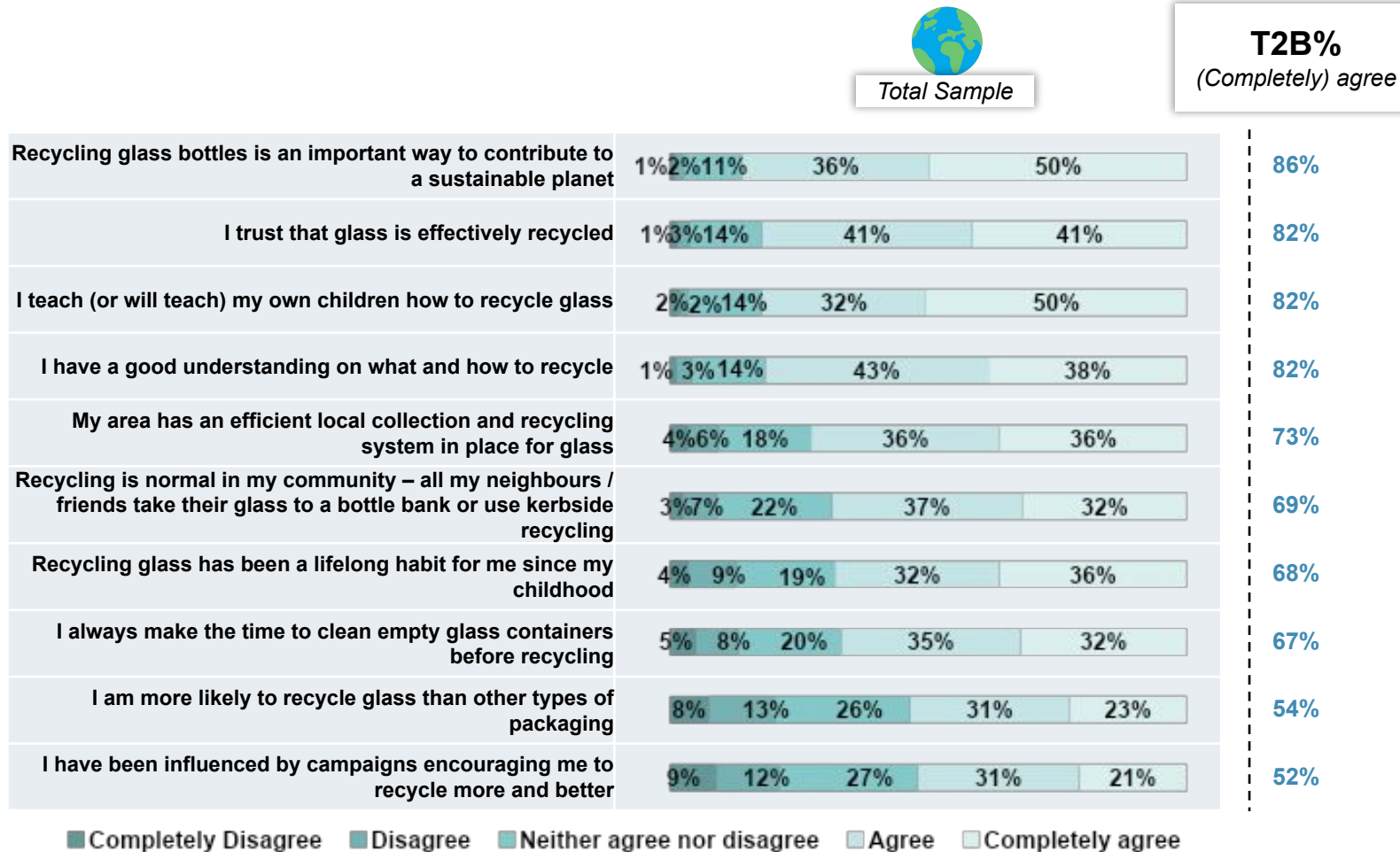
Recycling is seen as important and is a trusted process.

Almost 9 out of 10 consumers agree with the fact that recycling glass is important to sustainable planet. Consumers also believe to understand what and how to recycle and trust that glass is effectively recycled and. Importance of recycling is emphasized by the fact that they would also teach it to their children.



 **83%** Are likely (always/often) to recycle glass packaging

Among them



Q24: You indicated that you are likely to recycle glass packaging once you're finished using it. When it comes to efforts to recycle more, to what extent do you agree with the following statements? - N=3871

Recycling glass packaging *by country*

Importance of recycling is evaluated as somewhat higher in Spain, Portugal and Turkey



T2B%

(Completely) agree



Recycling glass bottles is an important way to contribute to a sustainable planet	86%	91%	85%	85%	78%	88%	83%	86%	86%	85%	90%	91%	83%	91%
I trust that glass is effectively recycled	82%	88%	79%	82%	78%	80%	86%	83%	75%	88%	86%	84%	82%	86%
I teach (or will teach) my own children how to recycle glass	82%	85%	68%	84%	77%	86%	84%	81%	88%	84%	91%	89%	77%	89%
I have a good understanding on what and how to recycle	82%	84%	82%	83%	73%	86%	80%	81%	86%	75%	88%	80%	76%	83%
My area has an efficient local collection and recycling system in place for glass	73%	77%	74%	67%	72%	79%	79%	78%	50%	75%	62%	76%	69%	75%
Recycling is normal in my community – all my neighbours / friends take their glass to a bottle bank or use kerbside recycling	69%	61%	74%	68%	70%	77%	74%	74%	55%	69%	73%	55%	66%	64%
Recycling glass has been a lifelong habit for me since my childhood	68%	70%	60%	74%	72%	71%	70%	78%	62%	62%	61%	58%	63%	73%
I always make the time to clean empty glass containers before recycling	67%	54%	77%	83%	52%	74%	64%	63%	72%	62%	71%	47%	63%	77%
I am more likely to recycle glass than other types of packaging	54%	56%	51%	57%	47%	60%	47%	44%	47%	47%	63%	45%	40%	86%
I have been influenced by campaigns encouraging me to recycle more and better	52%	66%	51%	52%	35%	61%	38%	28%	45%	39%	60%	61%	46%	84%
AVERAGE	35%	34%	34%	35%	36%	36%	39%	30%	36%	26%	31%	41%	29%	34%

Significantly **higher** / **lower** Country vs. Global

Q24: You indicated that you are likely to recycle glass packaging once you're finished using it. When it comes to efforts to recycle more, to what extent do you agree with the following statements?- N=3871

5% of consumers are not likely to recycle glass packaging

4 out of 10 respondents who are not likely to recycle, report it is due to logistical reasons, such as convenience recycling facilities, or bottle banks. This is especially true for Portugal and Switzerland where almost 8 out of 10 respondents lack convenient recycling facilities near their homes.



5%

Are not likely (never/rarely) to recycle glass packaging

Among them



Total Sample

I don't have a convenient place near my home to be able to recycle	38%
There are no conveniently located bottle banks where I live	32%
There is no (frequent) kerbside collection of glass where I live	27%
It takes a lot of time to separate the waste	15%
I don't want to worry about cleaning the glass containers	13%
I don't get penalised if I don't contribute to recycling	13%
I don't have clear guidelines on how to recycle	12%
I don't see recycling as something useful	8%
Other	12%

Recycling glass packaging *by country*

Consumers in the UK significantly higher results in when it comes to agreeing with con-recycling claims.



I don't have a convenient place near my home to be able to recycle	38%	19%	58%	37%	37%	38%	16%	27%	41%	34%	13%	80%	45%	35%
There are no conveniently located bottle banks where I live	32%	25%	57%	31%	11%	38%	31%	77%	31%	24%	27%	22%	43%	45%
There is no (frequent) kerbside collection of glass where I live	27%	15%	51%	28%	26%	20%	43%	7%	17%	28%	45%	0%	33%	46%
It takes a lot of time to separate the waste	15%	26%	0%	6%	33%	44%	0%	21%	4%	19%	0%	10%	7%	34%
I don't want to worry about cleaning the glass containers	13%	10%	18%	10%	17%	0%	17%	7%	8%	25%	24%	0%	21%	21%
I don't get penalised if I don't contribute to recycling	13%	7%	4%	6%	29%	20%	13%	39%	12%	27%	11%	0%	14%	9%
I don't have clear guidelines on how to recycle	12%	6%	17%	17%	24%	18%	25%	0%	4%	6%	15%	0%	0%	26%
I don't see recycling as something useful	8%	15%	13%	12%	0%	0%	14%	7%	14%	0%	0%	10%	0%	0%
Other	12%	23%	4%	12%	4%	0%	14%	10%	20%	23%	0%	0%	24%	0%

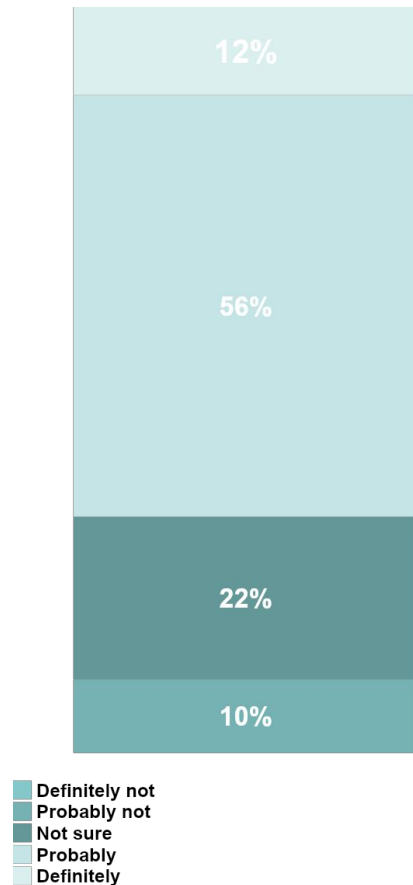
Significantly **higher** / **lower** Country vs. Global

Q23: You indicated that you are not likely to recycle glass packaging once you're finished using it. When it comes to efforts to recycle more, to what extent do you agree with the following statements? - N=202

Zoom in on Croatia & Poland

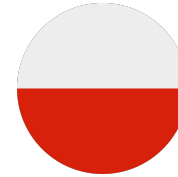


Almost 7 out of 10 of consumers in Croatia state that they would be inclined to recycle if the bottles would be processed and turned into new bottles and jars

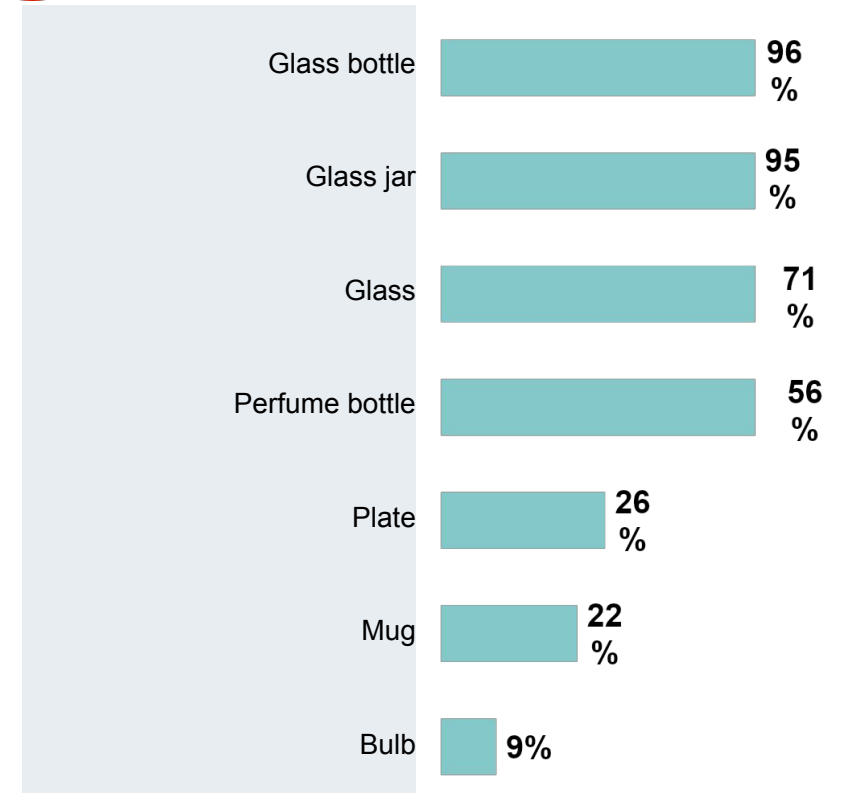


Q26: To what extent would you be inclined to recycle if the bottles you recycle would be processed and turned into new bottles and jars in Croatia? - N=23

Low Sample size



Consumers in Poland mostly recycle glass bottles and jars in the bottle banks.

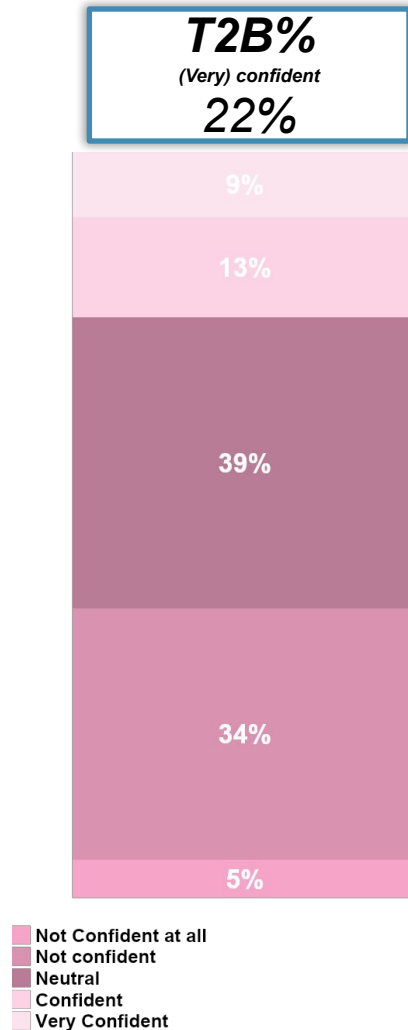


Q25: What do you put into the bottle bank? - N=200

Zoom in on UK

Only 2 out of 10 in the UK state that they are confident that packaging they recycle actually gets recycled

Of the consumers who are not confident about glass recycling in the UK, almost 7 out of 10 would consider that evidence of recycling would improve their level of confidence in this process



Q27: How confident are you that the packaging you recycle actually gets recycled? - N=22

Low Sample size

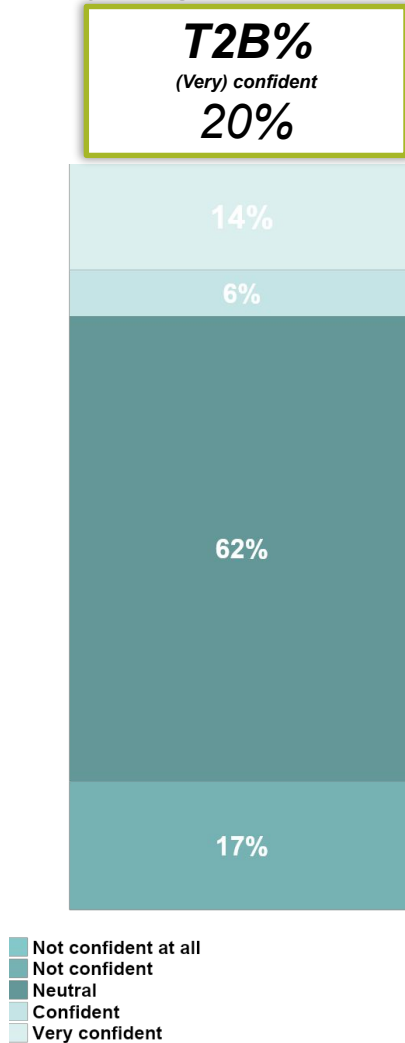


Q28: You indicated that you are not confident that the packaging you recycle actually gets recycled. What would improve your level of confidence in this process? - N=22

Low Sample size

Zoom in on Germany

Only 2 out of 10 in the Germany state that they are confident that packaging they recycle actually gets recycled
Of the consumers who are not confident about glass recycling in Germany, almost 7 out of 10 would consider that evidence of recycling would improve their level of confidence in this process



Q27: How confident are you that the packaging you recycle actually gets recycled? - N=27

Low Sample size

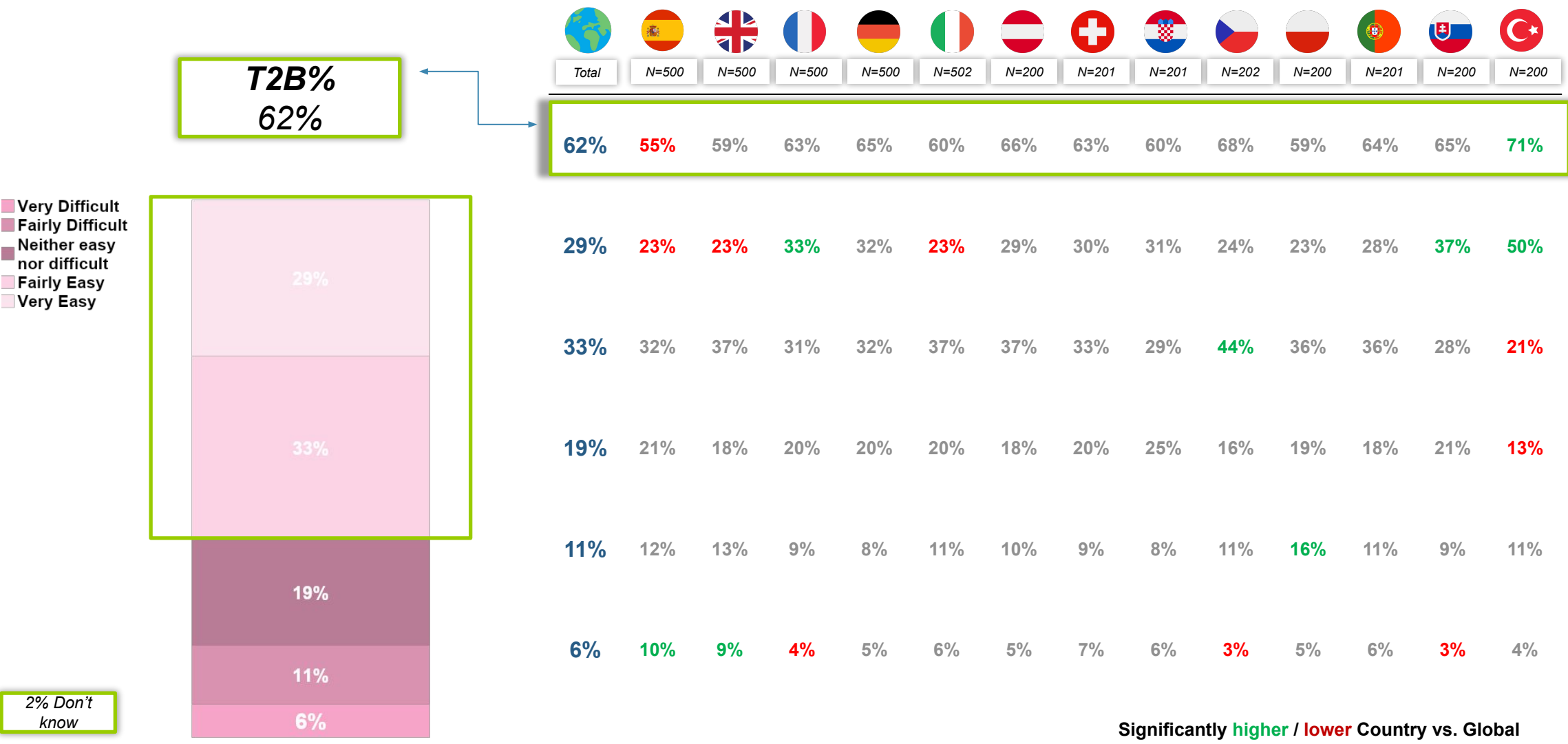


Q28: You indicated that you are not confident that the packaging you recycle actually gets recycled. What would improve your level of confidence in this process? - N=27

Low Sample size

6 out of 10 consumers report that it would be easy to recycle used glass bottles

Consumers in Turkey find it easier to recycle, achieving significantly higher results, while consumers in Spain achieve significantly lower results.



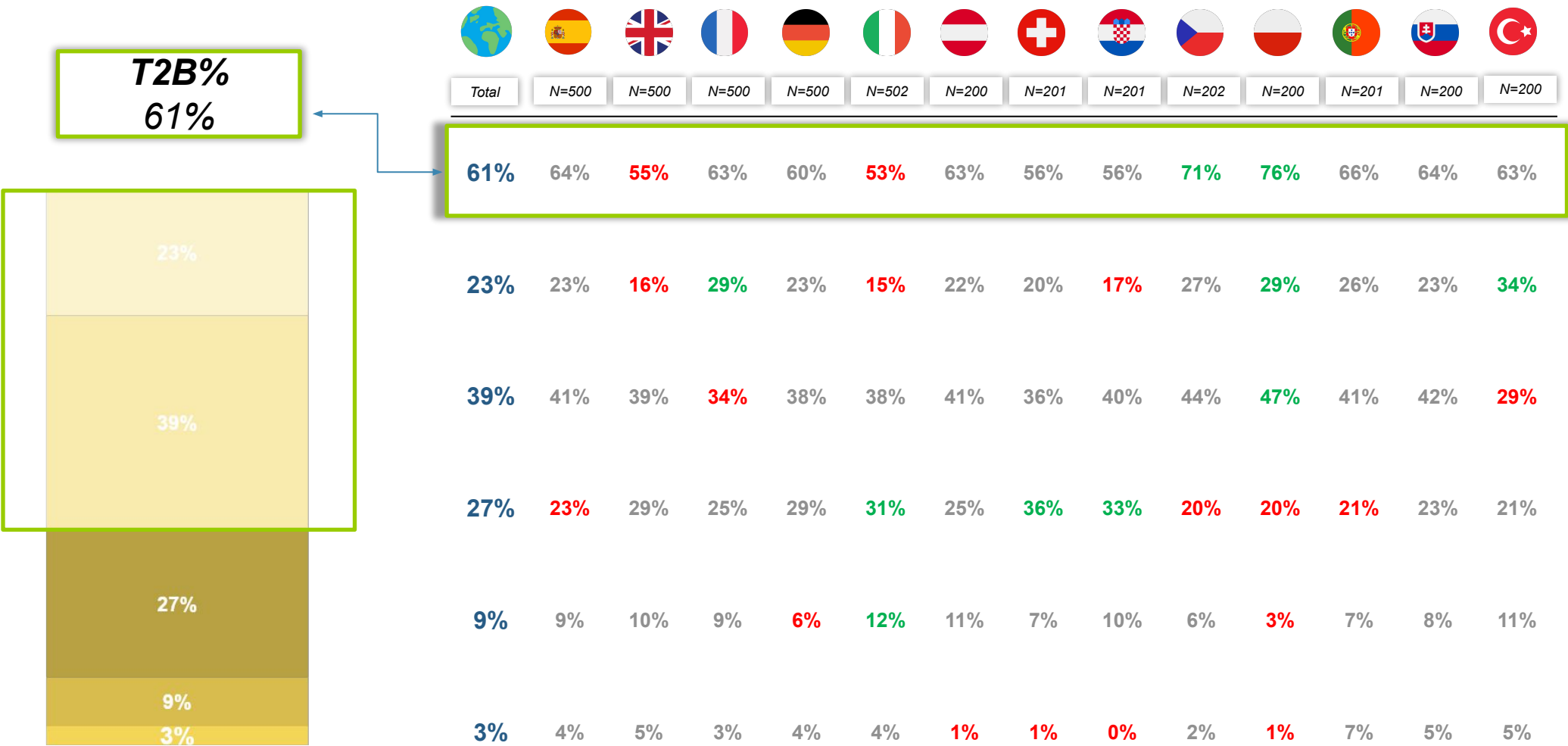
Q29: Please imagine you had bought beverages in glass bottles, and you have saved up these glass bottles over the course of the last 2 weeks... You are now looking to return them to your nearest supermarket. Thinking about your own personal situation, to what extent would returning these glass bottles be easy or difficult for you - N=4107

6 out of 10 consumers consider that if DRS system were in place, their country would use it

Consumers in the UK and Italy achieve significantly lower results than other countries, with only 5 out of 10 consumers agreeing to it, while consumers in Poland and the Czech republic achieved significantly higher results with over 7 out of 10 consumers agreeing.



- Highly unlikely
- Rather unlikely
- Unsure
- Rather likely
- Very likely



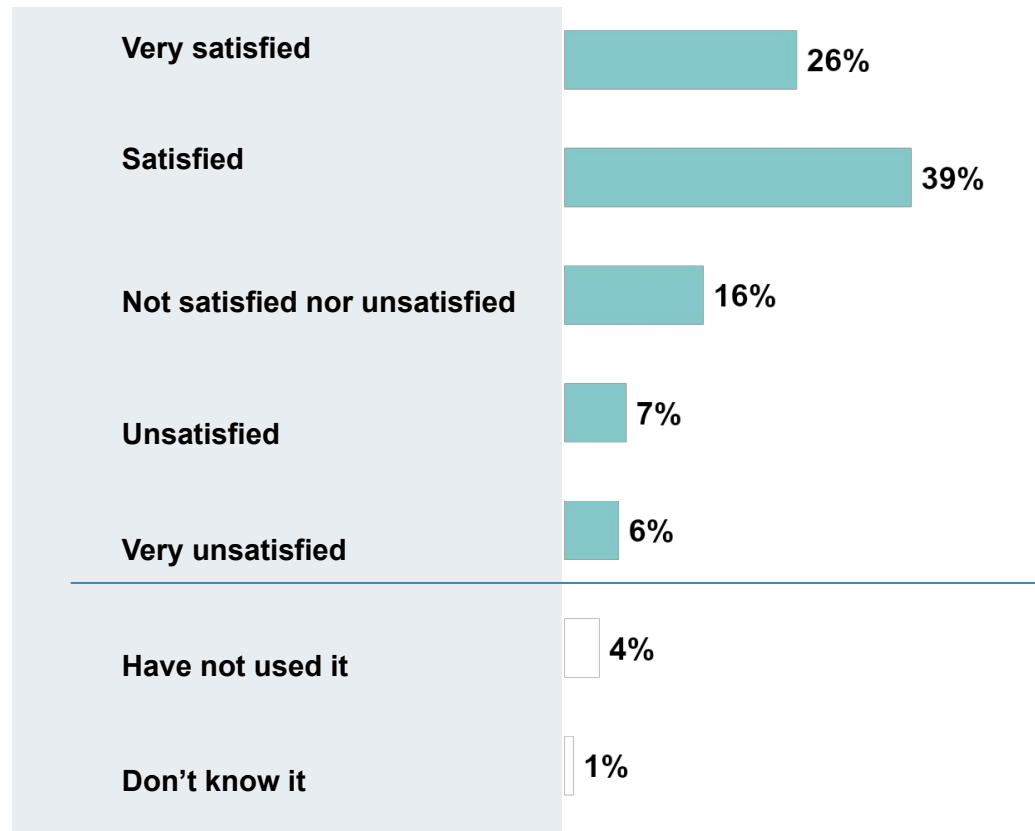
Significantly higher / lower Country vs. Global

Zoom in on Slovakia

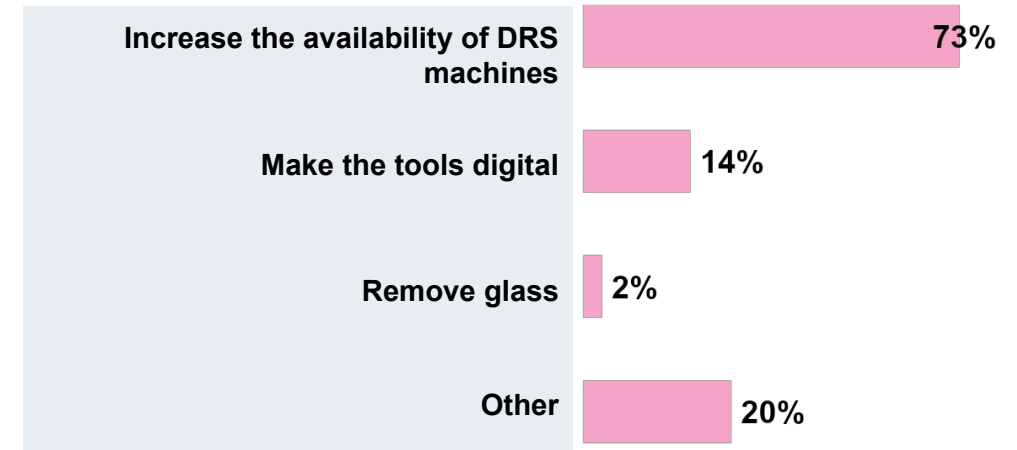
6 out of 10 of consumers in Slovakia are satisfied with the DRS system in Slovakia, and less than 1 out 10 people have never used it. Of those who are unsatisfied with the system, the majority find that the increased availability of DRS machines would make the system better.



T2B%
(Very) satisfied
65%



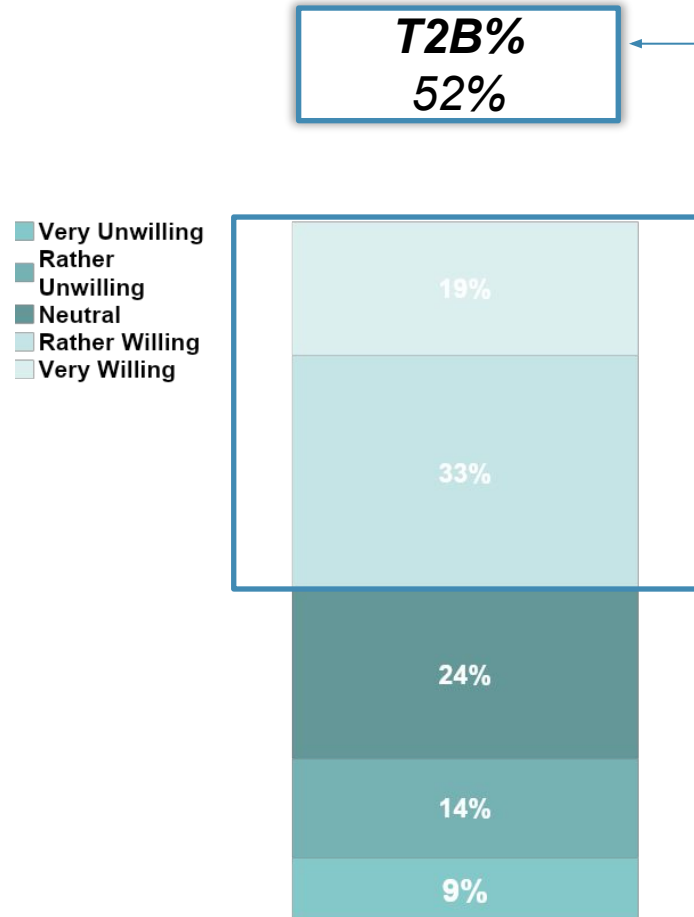
Q31 : To what extent are you satisfied with this system for the return of glass packaging in Slovakia? - N=200



Q32: You indicated that you are not satisfied with this DRS system. What could make the system work better? - N=200

5 out 10 consumers would be willing to pay a deposit to participate in a return system

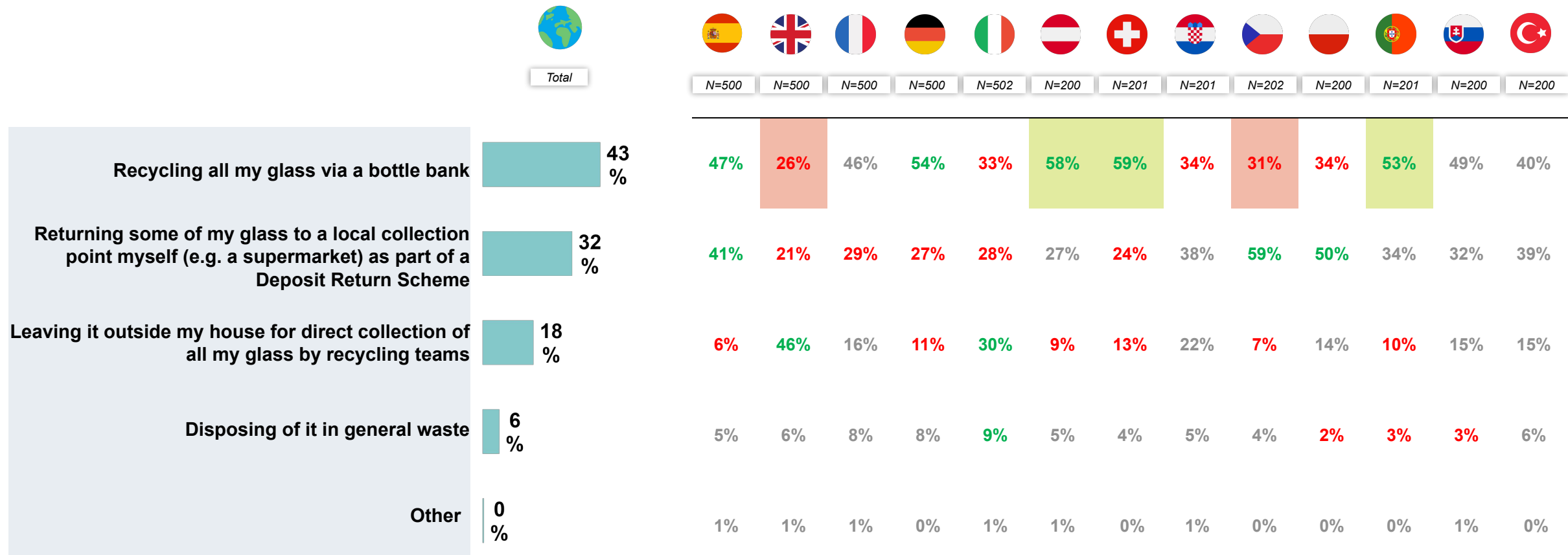
Consumers in Germany, Austria, Czech Republic Slovakia and Turkey achieved significantly higher results than those in the UK, France, Italy, Croatia and Portugal.



Total	N=500	N=500	N=500	N=500	N=502	N=200	N=201	N=201	N=202	N=200	N=201	N=200	N=200
52%	54%	43%	47%	58%	47%	60%	51%	38%	63%	68%	40%	61%	74%
19%	17%	15%	18%	25%	13%	24%	23%	11%	17%	28%	10%	18%	38%
33%	37%	28%	29%	33%	34%	36%	27%	28%	45%	41%	29%	43%	36%
24%	22%	28%	24%	24%	25%	22%	24%	40%	22%	15%	32%	23%	11%
14%	14%	15%	13%	11%	20%	14%	19%	15%	12%	10%	21%	9%	8%
9%	11%	14%	16%	8%	8%	4%	6%	6%	3%	6%	7%	7%	7%

Significantly **higher** / **lower** Country vs. Global

4 out of 10 consumers would prefer recycling their glass packaging in bottle banks, while 3 out 10 would prefer return it in at a local collection point.



Bottle bank usage is especially high VS low

Significantly higher / lower Country vs. Global

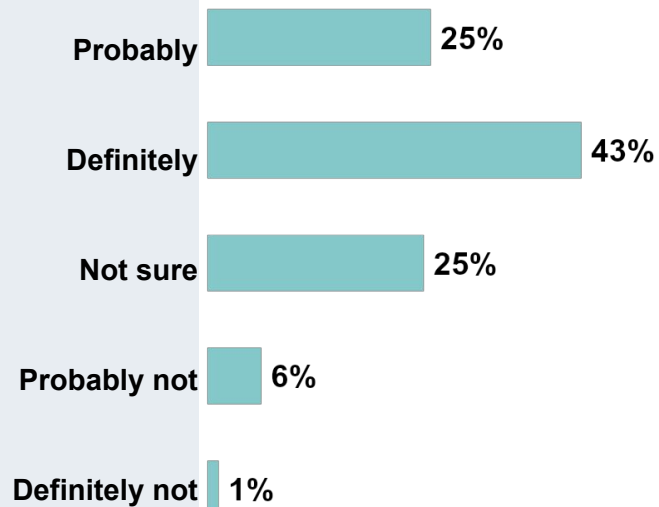
Q34 : If you had the choice, regardless of current infrastructure in your local area, how would you dispose of your used glass packaging once you are finished using it? – N=4107

Zoom in on Switzerland

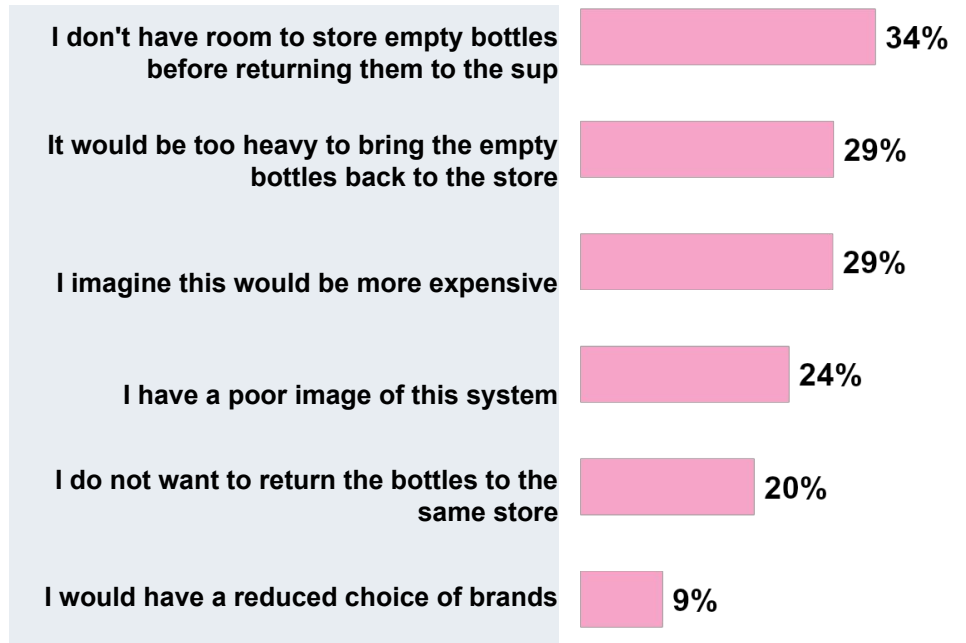
Almost 7 out of 10 of consumers in Switzerland would switch to returnable packaging in supermarkets. Of those who would not switch, the leading barrier was not having the space to store the bottles at home or find it would be heavy to carry the empty bottles back to the store.



T2B%
Probably - Definitely
68%



Q35 : As you might know, Switzerland is a one-way packaging market today. Imagine that a supermarket started to offer drinks (e.g. beer, water) in refillable glass bottles, would you switch to this returnable packaging? – N=201



Q36 : You indicated that would not be willing to switch to a returnable packaging. Please indicate why. – N=64

DESIGN & BRANDING OF GLASS PACKAGING



InSites Consulting



7 out of 10 consumers report that packaging plays a crucial role in telling brands apart and enhances the value of a product

Glass packaging in particular can help to enhance the value of a product and people trust the quality of products more when packaged in glass.



InSites Consulting

T2B%
(Completely) agree



Spanish, Polish and Turkish consumers show the highest appreciation of glass packaging

In contrast, Austria, Switzerland and Germany achieve significantly lower results than the global average on lost claims.



T2B% (Completely) agree															
		Total	N=500	N=500	N=500	N=500	N=502	N=200	N=201	N=201	N=202	N=200	N=201	N=200	N=200
Packaging helps to tell different brands apart	73%	75%	74%	69%	63%	75%	66%	64%	79%	74%	77%	78%	80%	82%	
Glass packaging can enhance the value of a product	69%	75%	63%	73%	58%	71%	58%	63%	69%	66%	80%	58%	77%	89%	
The most iconic products have a distinctive packaging which is a core part of their brand identity	65%	69%	68%	65%	48%	69%	48%	52%	75%	64%	75%	69%	67%	79%	
I trust the quality of a product more if it is packaged in glass	65%	69%	56%	65%	50%	70%	56%	56%	70%	68%	75%	67%	65%	92%	
Many people choose a product based on the packaging design	64%	71%	61%	57%	55%	66%	55%	54%	76%	69%	70%	66%	69%	78%	
People are often happy to pay more for a product if it is aesthetically pleasing	63%	64%	61%	64%	56%	63%	57%	56%	76%	65%	78%	47%	69%	79%	
An iconic design can create an emotional connection with a product	61%	68%	65%	53%	45%	67%	44%	50%	66%	60%	70%	72%	69%	74%	
People would still buy their favourite products if they came in a uniform packaging to their competitors	56%	59%	54%	64%	49%	61%	49%	46%	55%	52%	59%	46%	56%	68%	
Paper packaging can enhance the value of a product	36%	38%	38%	40%	35%	40%	29%	24%	30%	30%	46%	21%	26%	49%	
Metal packaging can enhance the value of a product	30%	30%	34%	34%	27%	31%	19%	23%	29%	31%	30%	26%	28%	42%	
‘Bag in box’ packaging can enhance the value of a product	28%	37%	26%	26%	25%	28%	17%	21%	25%	22%	35%	32%	23%	40%	
Plastic packaging can enhance the value of a product	21%	24%	21%	24%	21%	20%	13%	18%	17%	16%	16%	24%	18%	24%	

Significantly **higher** / **lower** Country vs. Global

Brands with the most distinctive glass packaging



Q38 :With regards to products with distinctive glass packaging, which brands come to mind first? - N=4107

**The bigger the pack, the most times this brand was mentioned*

Brands with the most distinctive glass packaging per country



Coca-Cola,
Mahou, Estrella Galicia,
La Casera



Coca-Cola,
Landliebe, Vöslauer,
Efko, Römerquelle



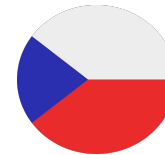
Coca-Cola,
Zlatý Bažant, Budiš



Coca-Cola, Heinz,
Dolmio, Marmite



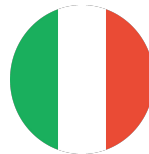
Coca-Cola, Nutella,
Barilla



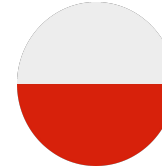
Coca-Cola,
Mattoni, Olma, Hame



Coca-Cola,
Nutella, Bonne Maman,
Andros, Panzani



Coca-Cola,
Mutti, **Nutella,**
Barilla, Cirio



Coca-Cola,
Pepsi, Pudliszki,
Łowicz, Lech



Coca-Cola,
Compal, Super Bock,
Sagres



Nutella,
Landliebe,
Coca-Cola, Kühne



Jamnica,
Coca-Cola,
Podravka, Maraska



Pinar,
Coca-Cola, Erikli,
Tamek



Content

RESEARCH BACKGROUND

DETAILED RESULTS

EXECUTIVE SUMMARY

KEY CONCLUSIONS



Purchase Behaviour of Glass

- Purchase of products in glass has increased
- Driven by perceived **recyclability** and positive **impact on environment**
- Consumers **recommend glass** packaging and see it as a **material of the future**
- **Barriers** for glass: **convenience** and perceived **price**
- Room to promote glass packaging, as **ad exposure levels are below the 2019 levels**



Sustainability & Health

- Most relevant aspects of the sustainability debate: **reducing food waste** and **increasing recycling**
- **Companies should play a major role** by using **sustainable packaging** and **informing consumers about recycling**
- Glass is important in this debate as it's seen as a good material to prevent **health** and **environmental concerns**
- **Glass packaging is also trusted when recycled** aside from Plastic/PET



Reuse & Recycling

- **Most EU consumers recycle**, which is seen as **self-evident** and **key to live more sustainable**
- This is supported by **efficient local collection and recycling systems** in most areas
- Most consumers believe that **glass is effectively recycled**
- **More limited opportunity for a DRS system** (1 in 4 believe in such a system and 1 in 5 are willing to pay deposit)
- In **direct comparison**, consumers prefer a **bottle bank** solution



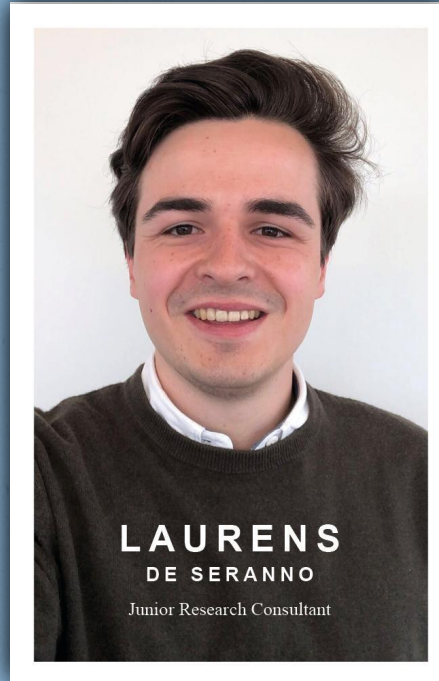
Design & Branding

- **7 out of 10** report that packaging plays a crucial role in telling brands apart and enhancing the value of a product. This is also the case for **glass**.
- Consumers **easily recall global and local brands** with **distinctive glass packaging**, such as **Coca-Cola, Nutella, Barilla** or **Heinz**.

LET'S *talk!*



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Laurens@insites.eu



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InSites Consulting

COUNTRY DASHBOARD SLIDES





Glass Consumption

28%

Buy more glass compared to 3 years ago

20%

Buy less glass compared to 3 years ago

79%

Agree that glass is a material for the future

Top 5 Drivers for glass

It can be recycled more effectively than other packaging materials **50%**

It causes less packaging waste **43%**

It causes less littering of packaging into the environment **41%**

Disposing and collecting glass for recycling is convenient **39%**

It's better at preserving your health than other materials **35%**



Reuse & Recycling

60%

Finds Recycling important

44%

Finds Circular Economy important

83%

Recycles glass packaging

9%

Finds Recycling difficult

43%

Prefers Bottle Banks

vs.

32%

Prefers a DRS System



Importance for branding

69%

Believes glass packaging can enhance the value of a product

65%

Trust the quality of a product more when packaged in glass



Health preservation

34%

Believes Glass can help prevent health and ecological hazards

16%

Considers packaging with recycled material a health danger

73%

Are concerned about Plastic/PET

32%

Are concerned about Glass



COUNTRY DASHBOARD

SPAIN



Glass Consumption

28% EU: 28%
Buy more glass compared to 3 years ago

20% EU: 20%
Buy less glass compared to 3 years ago

86% EU: 79%
Agree that glass is a material for the future

Top 5 Drivers for glass

		EU
It can be recycled more effectively than other packaging materials	56%	50%
It causes less packaging waste	40%	43%
It's better at preserving your health than other materials	39%	35%
It causes less littering of packaging into the environment	37%	41%
Producing glass packaging is less harmful for the environment than other packaging	37%	34%



Reuse & Recycling

64% Finds **Recycling** important EU: 60%
55% Finds **Circular Economy** important EU: 44%

84% **Recycles** glass packaging EU: 83%
11% Finds Recycling **difficult** EU: 9%

47% EU: 43% **vs.** **41%** EU: 32%
Prefers Bottle Banks Prefers a DRS System



Importance for branding

75% Believes glass packaging can **enhance the value** of a product EU: 69%
69% **Trust the quality** of a product more when packaged in glass EU: 65%



Health preservation

34% Believes Glass can help prevent **health and ecological** hazards EU: 34%

12% Considers packaging with **recycled material** a **health danger** EU: 16%
72% Are concerned about **Plastic/PET** EU: 73%
43% Are concerned about **Glass** EU: 32%



Market questions

46% Rank glass as their preferred packaging solution
26% Rank glass as second or third preferred packaging solution



COUNTRY DASHBOARD

UK



Glass Consumption

21% EU: 28%
Buy more glass compared to 3 years ago

22% EU: 20%
Buy less glass compared to 3 years ago

76% EU: 79%
Agree that glass is a material for the future

Top 5 Drivers for glass

		EU
It can be recycled more effectively than other packaging materials	56%	50%
It causes less packaging waste	40%	43%
It has a lower impact on wildlife or marine life	39%	34%
Producing glass packaging is less harmful for the environment than other packaging	33%	34%
Products last longer in glass	33%	35%



Reuse & Recycling

61% Finds Recycling important EU: 60%

44% Finds Circular Economy important EU: 44%

82% Recycles glass packaging EU: 83%

11% Finds Recycling difficult EU: 9%

26% EU: 43% Prefers Bottle Banks **vs.** **21%** EU: 32% Prefers a DRS System



Importance for branding

63% Believes glass packaging can enhance the value of a product EU: 69%

56% Trust the quality of a product more when packaged in glass EU: 65%



Health preservation

32% Believes Glass can help prevent health and ecological hazards EU: 34%

19% Considers packaging with recycled material a health danger EU: 16%

74% Are concerned about Plastic/PET EU: 73%

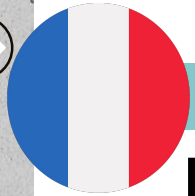
34% Are concerned about Glass EU: 32%



Market questions

39% Are not confident that the packaging they recycle actually gets recycled

68% Of those who are not confident state that evidence of the packaging getting recycled would increase their confidence



COUNTRY
DASHBOARD

FRANCE



Glass Consumption

21%

EU: 28%

Buy more glass compared to 3 years ago

25%

EU: 20%

Buy less glass compared to 3 years ago

76%

EU: 79%

Agree that glass is a material for the future

Top 5 Drivers for glass

		EU
It can be recycled more effectively than other packaging materials	46%	50%
It causes less packaging waste	41%	43%
It causes less littering of packaging into the environment	33%	41%
It causes less food waste	32%	26%
Products last longer in glass	31%	35%



Reuse & Recycling

50%

Finds **Recycling** important

EU: 60%

32%

Finds **Circular Economy** important

EU: 44%

82%

Recycles glass packaging

EU: 83%

7%

Finds Recycling **difficult**

EU: 9%

46%

EU: 43%

Prefers Bottle Banks

vs.

29%

EU: 32%

Prefers a DRS System



Importance for branding

73%

Believes glass packaging can **enhance the value** of a product

EU: 69%

65%

Trust the quality of a product more when packaged in glass

EU: 65%



Health preservation

34%

EU: 34%

Believes Glass can help prevent **health and ecological** hazards

22%

EU: 16%

Considers packaging with **recycled material** a **health danger**

68%

EU: 73%

Are concerned about **Plastic/PET**

37%

EU: 32%

Are concerned about **Glass**



COUNTRY
DASHBOARD

GERMANY



Glass Consumption

35% EU: 28%
Buy more glass compared to 3 years ago

13% EU: 20%
Buy less glass compared to 3 years ago

75% EU: 79%
Agree that glass is a material for the future

Top 5 Drivers for glass

		EU
It causes less packaging waste	57%	43%
It can be recycled more effectively than other packaging materials	48%	50%
It causes less littering of packaging into the environment	48%	41%
Disposing and collecting glass for recycling is convenient	39%	39%
It's better at preserving your health than other materials	36%	35%



Reuse & Recycling

49% Finds Recycling important EU: 60%

38% Finds Circular Economy important EU: 44%

81% Recycles glass packaging EU: 83%

7% Finds Recycling difficult EU: 9%

54% EU: 43% Prefers Bottle Banks **vs.** **27%** EU: 32% Prefers a DRS System



Importance for branding

58% Believes glass packaging can enhance the value of a product EU: 69%

50% Trust the quality of a product more when packaged in glass EU: 65%



Health preservation

33% Believes Glass can help prevent health and ecological hazards EU: 34%

20% Considers packaging with recycled material a health danger EU: 16%

73% Are concerned about Plastic/PET EU: 73%

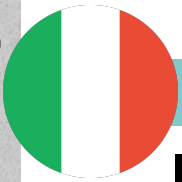
28% Are concerned about Glass EU: 32%



Market questions

17% Are not confident that the packaging they recycle actually gets recycled

68% Of those who are not confident state that evidence of the packaging getting recycled would increase their confidence



COUNTRY DASHBOARD

ITALY



Glass Consumption

30% EU: 28%
Buy more glass compared to 3 years ago

17% EU: 20%
Buy less glass compared to 3 years ago

81% EU: 79%
Agree that glass is a material for the future

Top 5 Drivers for glass

		EU
It can be recycled more effectively than other packaging materials	48%	50%
It has a lower impact on wildlife or marine life	42%	34%
It causes less packaging waste	41%	43%
Producing glass packaging is less harmful for the environment than other packaging	36%	34%
Disposing and collecting glass for recycling is convenient	35%	39%



Reuse & Recycling

61% Finds **Recycling** important EU: 60%

44% Finds **Circular Economy** important EU: 44%

90% **Recycles** glass packaging EU: 83%

9% Finds Recycling **difficult** EU: 9%

33% EU: 43% **vs.** **28%** EU: 32%
Prefers Bottle Banks Prefers a DRS System



Importance for branding

71% Believes glass packaging can **enhance the value** of a product EU: 69%

70% **Trust the quality** of a product more when packaged in glass EU: 65%



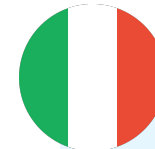
Health preservation

36% Believes Glass can help prevent **health and ecological** hazards EU: 34%

12% Considers packaging with **recycled material** a **health danger** EU: 16%

71% Are concerned about **Plastic/PET** EU: 73%

29% Are concerned about **Glass** EU: 32%



Market questions

57%
Rank glass as their preferred packaging option

29%
Rank glass as their second or third preferred packaging option



COUNTRY
DASHBOARD

AUSTRIA



Glass Consumption

41% EU: 28%
Buy more glass compared to 3 years ago

16% EU: 20%
Buy less glass compared to 3 years ago

80% EU: 79%
Agree that glass is a material for the future

Top 5 Drivers for glass

		EU
It causes less littering of packaging into the environment	56%	41%
It can be recycled more effectively than other packaging materials	52%	50%
It causes less packaging waste	49%	43%
Disposing and collecting glass for recycling is convenient	44%	39%
Products in glass packs often are or feel more premium / of higher quality	35%	28%



Reuse & Recycling

53% Finds **Recycling** important EU: 60%

39% Finds **Circular Economy** important EU: 44%

85% **Recycles** glass packaging EU: 83%

8% Finds Recycling **difficult** EU: 9%

58% EU: 43% **vs.** **27%** EU: 32%
Prefers Bottle Banks Prefers a DRS System



Importance for branding

58% Believes glass packaging can **enhance the value** of a product EU: 69%

56% **Trust the quality** of a product more when packaged in glass EU: 65%



Health preservation

38% Believes Glass can help prevent **health and ecological** hazards EU: 34%

15% Considers packaging with **recycled material** a **health danger** EU: 16%

64% Are concerned about **Plastic/PET** EU: 73%

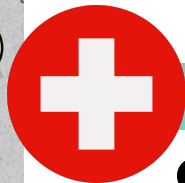
35% Are concerned about **Glass** EU: 32%



Market questions

69% Would be more inclined to buy a glass packaged product if the product and packaging were made in Austria

86% Would be willing to pay more for this “made in Austria” product



COUNTRY
DASHBOARD

SWITZERLAND



Glass Consumption

20% EU: 28%
Buy more glass compared to 3 years ago

14% EU: 20%
Buy less glass compared to 3 years ago

83% EU: 79%
Agree that glass is a material for the future

Top 5 Drivers for glass

		EU
It can be recycled more effectively than other packaging materials	54%	50%
It causes less littering of packaging into the environment	48%	41%
It causes less packaging waste	48%	43%
Disposing and collecting glass for recycling is convenient	40%	39%
It's better at preserving your health than other materials	32%	35%



Reuse & Recycling

54% Finds **Recycling** important EU: 60%

36% Finds **Circular Economy** important EU: 44%

87% **Recycles** glass packaging EU: 83%

8% Finds Recycling **difficult** EU: 9%

59% EU: 43% **vs.** **24%** EU: 32%
Prefers Bottle Banks Prefers a DRS System



Importance for branding

63% Believes glass packaging can **enhance the value** of a product EU: 69%

56% **Trust the quality** of a product more when packaged in glass EU: 65%



Health preservation

32% Believes Glass can help prevent **health and ecological** hazards EU: 34%

18% Considers packaging with **recycled material** a **health danger** EU: 16%

54% Are concerned about **Plastic/PET** EU: 73%

29% Are concerned about **Glass** EU: 32%



Market questions

68% Would definitely or probably switch to a returnable packaging supermarket

86% Of those who would not switch to a returnable packaging shop, state it is because they don't have room to store the empty bottles before returning them



CROATIA



Glass Consumption

18% EU: 28%
Buy more glass compared to 3 years ago

28% EU: 20%
Buy less glass compared to 3 years ago

74% EU: 79%
Agree that glass is a material for the future

Top 5 Drivers for glass

		EU
It's better at preserving your health than other materials	67%	35%
It can be recycled more effectively than other packaging materials	53%	50%
Products last longer in glass	48%	35%
It's better at preventing food contamination than other materials	42%	33%
Producing glass packaging is less harmful for the environment than other packaging	40%	34%



Reuse & Recycling

68% Finds **Recycling** important EU: 60%

54% Finds **Circular Economy** important EU: 44%

71% **Recycles** glass packaging EU: 83%

7% Finds Recycling **difficult** EU: 9%

34% EU: 43% **vs.** **38%** EU: 32%
Prefers Bottle Banks Prefers a DRS System



Importance for branding

69% Believes glass packaging can **enhance the value** of a product EU: 69%

70% **Trust the quality** of a product more when packaged in glass EU: 65%



Health preservation

32% Believes Glass can help prevent **health and ecological** hazards EU: 34%

13% Considers packaging with **recycled material** a **health danger** EU: 16%

89% Are concerned about **Plastic/PET** EU: 73%

37% Are concerned about **Glass** EU: 32%



Market questions

68% Would be probably or definitely be inclined to recycle if the bottles were processed into new bottles in Croatia

16% Would probably not be inclined to recycle if the bottles were processed into new bottles and jars in Croatia

CZECH REPUBLIC



Glass Consumption

15% EU: 28%

Buy more glass compared to 3 years ago

32% EU: 20%

Buy less glass compared to 3 years ago

78% EU: 79%

Agree that glass is a material for the future

Top 5 Drivers for glass

		EU
It's better at preventing food contamination than other materials	54%	33%
It can be recycled more effectively than other packaging materials	50%	50%
Disposing and collecting glass for recycling is convenient	47%	39%
It causes less littering of packaging into the environment	42%	41%
It has a lower impact on wildlife or marine life	38%	34%



Reuse & Recycling

49% Finds Recycling important EU: 60%**31%** Finds Circular Economy important EU: 44%**85%** Recycles glass packaging EU: 83%**7%** Finds Recycling difficult EU: 11%

31% EU: 43% Prefers Bottle Banks **vs.** **59%** EU: 32% Prefers a DRS System



Importance for branding

66% Believes glass packaging can enhance the value of a product EU: 69%**68%** Trust the quality of a product more when packaged in glass EU: 65%

Health preservation

31% Believes Glass can help prevent health and ecological hazards EU: 34%

15% EU: 16% Considers packaging with recycled material a health danger

72% EU: 73% Are concerned about Plastic/PET

30% EU: 32% Are concerned about Glass

POLAND



Glass Consumption

40% EU: 28%

Buy more glass compared to 3 years ago

13% EU: 20%

Buy less glass compared to 3 years ago

72% EU: 79%

Agree that glass is a material for the future

Top 5 Drivers for glass

		EU
It can be recycled more effectively than other packaging materials	47%	50%
It causes less littering of packaging into the environment	47%	41%
Disposing and collecting glass for recycling is convenient	44%	39%
It has a lower impact on wildlife or marine life	44%	34%
It's better at preventing food contamination than other materials	43%	33%



Reuse & Recycling

71% Finds **Recycling** important EU: 60%**53%** Finds **Circular Economy** important EU: 44%**84%** **Recycles** glass packaging EU: 83%**11%** Finds Recycling **difficult** EU: 9%

34% EU: 43% **vs.** **50%** EU: 32%

Prefers Bottle Banks Prefers a DRS System



Importance for branding

80% Believes glass packaging can **enhance the value** of a product EU: 69%**75%** **Trust the quality** of a product more when packaged in glass EU: 65%

Health preservation

30% Believes Glass can help prevent **health and ecological** hazards EU: 34%

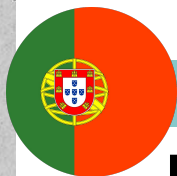
9% Considers packaging with **recycled material** a **health danger** EU: 16%

83% Are concerned about **Plastic/PET** EU: 73%

17% Are concerned about **Glass** EU: 32%

Market questions

96% Of respondents put glass bottles in bottle banks**95%** Of respondents put glass jars in bottle banks



COUNTRY
DASHBOARD

PORTUGAL



Glass Consumption

28%

EU: 28%

Buy more glass compared to 3 years ago

16%

EU: 20%

Buy less glass compared to 3 years ago

83%

EU: 79%

Agree that glass is a material for the future

Top 5 Drivers for glass

		EU
It can be recycled more effectively than other packaging materials	65%	50%
It causes less littering of packaging into the environment	47%	41%
It causes less packaging waste	45%	43%
Disposing and collecting glass for recycling is convenient	41%	39%
Producing glass packaging is less harmful for the environment than other packaging	41%	34%



Reuse & Recycling

83%

Finds **Recycling** important

EU: 60%

64%

Finds **Circular Economy** important

EU: 44%

82%

Recycles glass packaging

EU: 83%

9%

Finds Recycling **difficult**

EU: 9%

53%

EU: 43%

Prefers Bottle Banks

vs.

34%

EU: 32%

Prefers a DRS System



Importance for branding

58%

Believes glass packaging can **enhance the value** of a product

EU: 69%

67%

Trust the quality of a product more when packaged in glass

EU: 65%



Health preservation

38%

EU: 34%

Believes Glass can help prevent **health and ecological** hazards

8%

EU: 16%

Considers packaging with **recycled material** a **health danger**

75%

EU: 73%

Are concerned about **Plastic/PET**

30%

EU: 32%

Are concerned about **Glass**



Market questions

51%

Of respondents consider glass to be the most environmentally friendly packaging solution

57%

Of respondents consider glass to be the most recyclable packaging solution



SLOVAKIA



Glass Consumption

14% EU: 28%

Buy more glass compared to 3 years ago

29% EU: 20%

Buy less glass compared to 3 years ago

78% EU: 79%

Agree that glass is a material for the future

Top 5 Drivers for glass

		EU
It causes less littering of packaging into the environment	66%	41%
It causes less packaging waste	58%	43%
Products last longer in glass	55%	35%
It can be recycled more effectively than other packaging materials	52%	50%
Producing glass packaging is less harmful for the environment than other packaging	49%	34%



Reuse & Recycling

64% Finds **Recycling** important EU: 60%

47% Finds **Circular Economy** important EU: 44%

82% **Recycles** glass packaging EU: 83%

6% Finds Recycling **difficult** EU: 9%

49% EU: 43% **vs.** **32%** EU: 32%
Prefers Bottle Banks Prefers a DRS System



Importance for branding

77% Believes glass packaging can **enhance the value** of a product EU: 69%

65% **Trust the quality** of a product more when packaged in glass EU: 65%



Health preservation

28% Believes Glass can help prevent **health and ecological** hazards EU: 34%

20% Considers packaging with **recycled material** a **health danger** EU: 16%

79% Are concerned about **Plastic/PET** EU: 73%

32% Are concerned about **Glass** EU: 32%



Market questions

65% Of respondents are satisfied or very satisfied with Slovakia's DRS system

73% Of respondents who are unsatisfied by the DRS system consider that the increased availability of DRS machines would make the system work.



TURKEY



Glass Consumption

65% EU: 28%

Buy more glass compared to 3 years ago

16% EU: 20%

Buy less glass compared to 3 years ago

94% EU: 79%

Agree that glass is a material for the future

Top 5 Drivers for glass

		EU
It gives a strong health safety feeling	62%	31%
It's better at preserving your health than other materials	54%	35%
Products last longer in glass	53%	35%
It's better at preventing food contamination than other materials	53%	33%
Disposing and collecting glass for recycling is convenient	52%	39%



Reuse & Recycling

69% Finds **Recycling** important EU: 60%

56% Finds **Circular Economy** important EU: 44%

76% **Recycles** glass packaging EU: 83%

8% Finds Recycling **difficult** EU: 9%

40% EU: 43% **vs.** **39%** EU: 32%
Prefers Bottle Banks Prefers a DRS System



Importance for branding

89% Believes glass packaging can **enhance the value** of a product EU: 69%

92% **Trust the quality** of a product more when packaged in glass EU: 65%



Health preservation

34% Believes Glass can help prevent **health and ecological** hazards EU: 34%

24% Considers packaging with **recycled material** a **health danger** EU: 16%

87% Are concerned about **Plastic/PET** EU: 73%

27% Are concerned about **Glass** EU: 32%