

FUTURE MADE CLEAR

WHAT ARE SHOPPERS
INTERESTED IN NOW?



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FUTURE MADE CLEAR: WHAT ARE SHOPPERS INTERESTED IN NOW?

We all strive for a better tomorrow – a world where the planet and its people are healthier and happier than they are today. People are increasingly seeing that their own footprint matters and are demanding more from businesses, governments and each other to ensure we foster a more sustainable world for the next generation. In the face of global warming, public health crises and economic turbulence, the will to step up our collective ability to drive change has never felt so urgent. Yet with so many conflicting voices about the way forward, how do we build momentum to achieve this future?

As stewards of glass – a packaging material we use each and every day – the container glass industry is striving to make the future clear. That's why we've researched over 150 trend reports to understand what has been driving consumer behaviour – and where it's headed in the years to come.

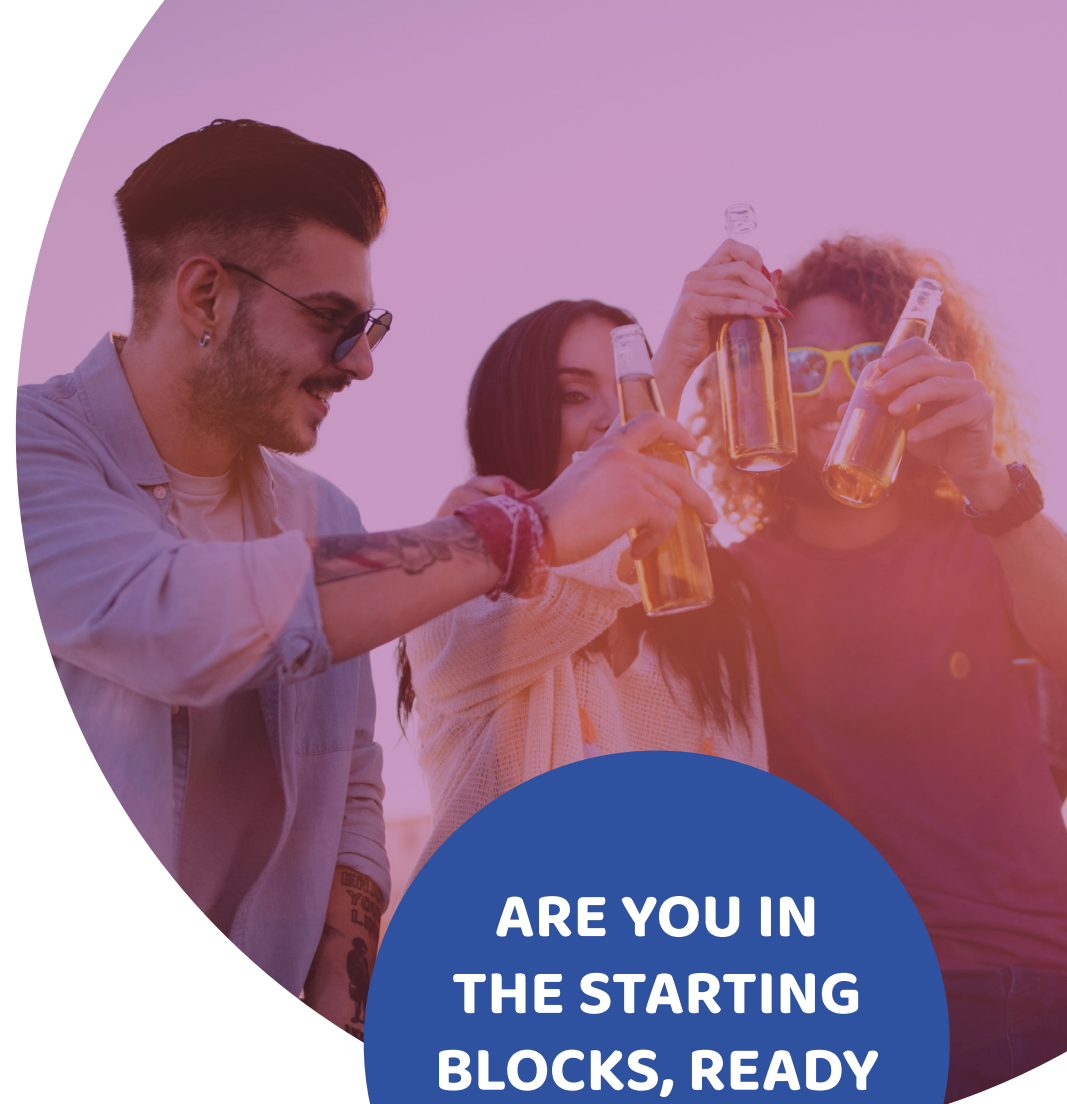
**150+
TREND
REPORTS**

**WHAT
TODAY'S
CONSUMERS
WANT TO
SEE ON THE
SHELVES**

Consumers are changing

The modern consumer is voting with their wallet and looking for brands that put purpose before profit. They're also looking at the bigger picture, from how a product is made to how it reaches them – and if you want your brand to continue to appeal to a new generation of consumers, how you package it is just as important as what's inside.

In this report, we'll outline these major shifts, and the smaller trends that are driving each of them in turn. We also offer considerations on **how brands like yours can best leverage these trends**, with insights on how the container glass industry is adapting to thrive together with its partners for generations to come. The brands who are set to come out on top over the next few years will be those who respond to these shifts in consumer expectations while staying true to their own values.



**ARE YOU IN
THE STARTING
BLOCKS, READY
TO JOIN THEM?**

TOP TRENDS TO WATCH

Broadly speaking, consumers have adapted their everyday shopping habits to better consider environmental sustainability, health and wellness, and circularity in everything they purchase. What does this translate to?

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**'GOING GREEN'
IS HERE TO STAY**

2

**HOLISTIC HEALTH
STEPS UP A GEAR,
AS WELLNESS
GOES PREMIUM**

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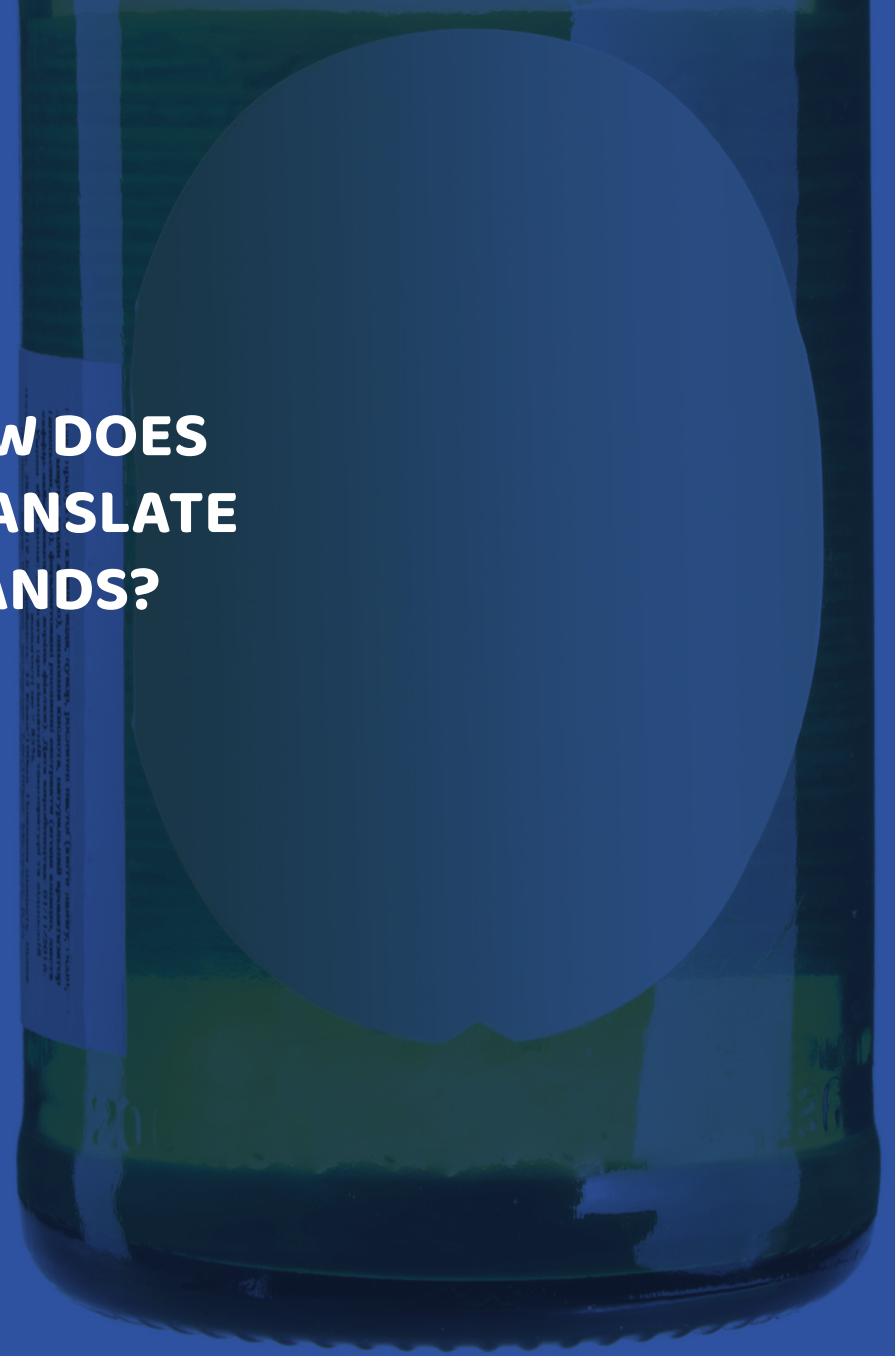
**CONSCIOUSLY
QUESTIONING
CONSUMPTION**

**GOING GREEN
IS HERE TO STAY**



Man-made climate change and its effects are becoming increasingly apparent and top-of-mind for consumers. The 2017 BBC nature documentary Blue Planet II was a wake-up call which brought the devastating effects of global warming and pollution to our TV screens, while continued news stories of environmental disasters and loss of biodiversity have accelerated the consumer-led shift to greener shopping habits. Seemingly against the odds, the COVID-19 pandemic accelerated these concerns, leading to a growing demand for environmentally-friendly products and an increased willingness to pay premium prices for them.

...SO HOW DOES THIS TRANSLATE FOR BRANDS?



EXCESS IS OUT, ENVIRONMENTALLY-FRIENDLY BRANDS ARE IN

One of the most significant societal changes seen over the last few years: the rising concern and sense of self-responsibility over our own impact on the planet.

Nearly half of consumers have become more concerned about reducing their environmental footprint since COVID-19¹ and 59% are more concerned about the **environmental impact** of brands they use². As many as 22% of the global population can be considered as 'Eco Actives,' as characterised by Kantar:

people who are highly concerned about the environment and making the most of actions to reduce their waste³. This concern has led to a pronounced change in shopping habits, spearheaded by a consumer focus on packaging. In Europe alone, three-quarters of shoppers say they prefer to buy products with environmentally-friendly packaging⁴. This provides an opportunity for brands in food and drinks to act as facilitators, helping consumers to become part of the change they want to see in the world⁵.

1 Global Data, GlobalData's TrendSights 2021 – Trends To Watch (p. 16)
2 Euromonitor International, Top 10 Global Consumer Trends
3 Kantar, Who Cares, Who Does (p. 3)
4 WARC, The Rise of Conscious Consumerism and its Impact on the FMCG Sector (p. 1)
5 Mintel, Global Food and Drink Trends (p. 24)



What's more, shoppers are increasingly avoiding companies that have ties to pollution, with 79% of consumers changing their purchase preferences based on the **social responsibility, inclusiveness or environmental impact of their purchases**⁶. Packaging is not immune from this scrutiny. Through activism, regulations and education, customers are now more aware that the packaging they rely on for their everyday products has the potential to impact negatively on the environment⁷. In fact, 29% of people have stopped buying from certain brands completely because their packaging was not sustainable⁸. Plastic faces the biggest scrutiny of all: 48% of shoppers would avoid retailers that are not actively trying to reduce their use of non-recyclable plastic packaging⁹.

So what's the alternative for these green-minded shoppers? One answer could be glass. Over two-thirds of shoppers rate glass as the only food and beverage packaging to have positive or neutral effects on the environment¹⁰. There are many reasons for this preference, one of which is that its all-natural ingredients and environmental friendliness resonates among a green-minded audience¹¹. Could it be time for more brands to turn to a packaging material that's been there all along?



29%

**OF PEOPLE HAVE
SWITCHED BRANDS DUE TO
UNSUSTAINABLE PACKAGING**

6 CapGemini, How sustainability is fundamentally changing consumer preferences (p. 2)
7 BillerudKorsnäs, Key Packaging Trends 2021: Beyond the Global Pandemic (p. 8)
8 DS Smith & Ipsos MORI, Sustainable Packaging: Has the COVID-10 Pandemic Changed Everything? (p. 11)
9 Two Sides Europe, European Packaging Preferences 2020 (p.9)
10 EcoFocus Worldwide, EcoFocus Consumer Trends (p. 123)
11 InSites Consulting/FEVE, Packaging & Recycling survey 2020

THE CHOICE OF PACKAGING MATTERS

Looking beyond the choice of packaging, **increasing the visibility of their environmental sustainability commitments** might be the key to survival for brands. With over half of consumers wanting brands to put more focus on being eco-friendly¹², it appears that brands that have no or low eco-credentials may be at risk of losing out to competitors that have, for example, chosen to go carbon neutral or pursue a zero-waste policy¹³. Unlimited access to information on packaging has led many consumers to be more willing to buy food packaged in more traditional packaging,

such as glass¹⁴. Brands using visibly recycled or recyclable materials therefore stand out on the shelves, and can easily and quickly promote their environmental credentials to consumers through nothing more than their choice of packaging. And that's not all: better labelling on the packaging, clear explanations of its sustainable attributes, and increased availability of sustainable packaging options¹⁵ would encourage consumers to buy more products in green packaging.

**SHOWCASING
SUSTAINABILITY
COMMITMENTS
COULD BE KEY TO
SURVIVAL FOR
BRANDS**

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14
15

GWI, Connecting the Dots (p. 67)

WARC, The rise of conscious consumerism and its impact for the FMCG sector (p. 4)

Journal of Cleaner Production, Food packaging and sustainability - Consumer perception vs. correlated scientific facts: A review (p. 2)

McKinsey & Company, Sustainability in packaging: Inside the minds of global consumers [Online article]





**ADOPTING AND CLEARLY
COMMUNICATING ENVIRONMENTAL
COMMITMENTS CAN BE A CLEAR-CUT
FOR BRANDS TO SECURE
CONSUMERS' LOYALTY**

**FOR BRANDS
WHO CHOOSE
TO TAKE
A STAND,
THE BENEFITS
CAN BE
EXPONENTIAL:**

45%

**OF CONSUMERS ARE MORE
LIKELY TO PROMOTE BRANDS
SEEN AS SUSTAINABLE VIA
WORD OF MOUTH¹⁶**

16

Billierudkorsnäs, Key Packaging Trends 2021: Beyond the Global Pandemic (p. 12)

SPEND MORE TO SAVE MORE: CONSUMERS ARE WILLING TO PAY MORE FOR SUSTAINABLE PRODUCTS

Though consumers claim to prefer eco-friendly products, a key question for brand marketers remains: will they pay for them? All signs point to 'yes'.

A sizeable majority of consumers throughout the world say they are willing to pay more for sustainable packaging¹⁷. This trend affects all age ranges, but it will come as no surprise to the savvy marketer that it's most popular with Millennials and Gen Z. In fact, in the EU nearly half (44%) of consumers report being **willing to spend more for products packaged sustainably**¹⁸, increasing to 60% among 18- to 24-year-old Europeans¹⁹. And as the younger generation comes of age, brands and retailers have a prime opportunity to launch products with distinct ethical or environmental claims, so-called 'value with values' products. The good news for brands? This mindset shift is set to allow for moderate price increases across the board, as long as they're accompanied by clear commitments²⁰.

17 McKinsey & Company, Sustainability in packaging: Inside the Minds of Global Consumers [Online article]

18 Two Sides, European Packaging Preferences (p. 8)

19 Roland Berger Perspectives and Expertise Highlights, Packaging sustainability in the consumer goods sector (p. 6)

20 Mintel, Global Food and Drink Trends (p. 15)

CONSUMERS VIEW MENTAL WELLBEING AS THE MAIN INDICATOR OF GOOD HEALTH

This drive to spend more on items with sustainable credentials coincides with a shift to **sustainability being embraced as a lifestyle** by consumers. Better yet, it seems that there's a real mental health benefit to embracing the sustainable lifestyle in all its forms (meaning human, social, and economic, as well as environmental) and consumers are prioritising value-added and health-conscious products and services as a result²¹.

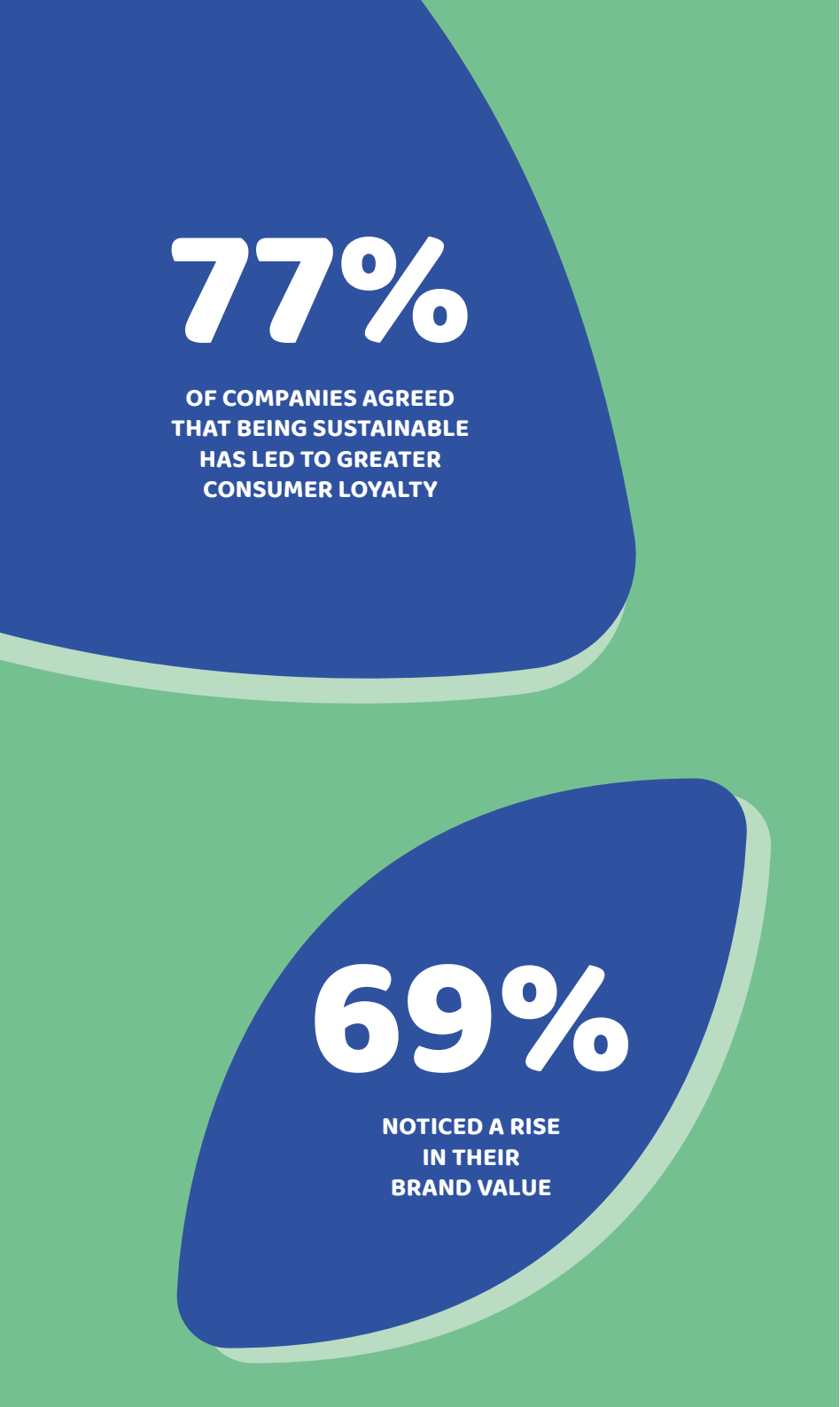
In an increasingly pressured world, those who practice sustainability-led behaviour in their daily lives and in their shopping (e.g. through minimising food waste or considering a products packaging) attribute positive emotions such as feeling "happy" when buying sustainable products²². **Mental wellbeing** has become the primary indicator of good health for consumers²³. Communicating on purpose-driven initiatives aimed at supporting mental wellbeing is considered crucial for increasing brand loyalty²⁴. This shows the potential for sustainability to impact customer experience, happiness and loyalty – and who doesn't want more of that?

21 Euromonitor International, Top 10 Global Consumer Trends 2021 (p. 37)

22 CapGemini, How sustainability is fundamentally changing consumer preferences (p. 2)

23 Euromonitor International, Top 10 Global Consumer Trends 2021 (p. 34)

24 Euromonitor International, Top 10 Global Consumer Trends 2021 (p. 45)



77%

OF COMPANIES AGREED
THAT BEING SUSTAINABLE
HAS LED TO GREATER
CONSUMER LOYALTY

69%

NOTICED A RISE
IN THEIR
BRAND VALUE

BRANDS WHO GET AHEAD OF THIS LIFESTYLE SHIFT ARE ALREADY BEING REWARDED FOR THEIR SUSTAINABILITY PUSH

In one study, 77% of companies surveyed across a variety of consumer products and retail companies agreed that being sustainable had led to a greater show of **loyalty from consumers**, while 69% noticed a rise in their brand value and more brand recommendations from consumers keen to share their eco-living tips by word of mouth. Most importantly, almost two thirds of brands and retailers surveyed saw higher total revenues as a result of their sustainability initiatives²⁵.

GLASS IN THE SPOTLIGHT

**WHEN IT COMES TO A
PACKAGING THAT DELIVERS
BOTH ON ENVIRONMENTAL
CREDENTIALS AND HELPING
BRANDS TELL THEIR STORY
AUTHENTICALLY, GLASS IS
AT THE FRONT OF THE PACK.**



Delivering on sustainability credentials

Glass is the only packaging material which is not just reusable and refillable, but also infinitely recyclable in a closed bottle-to-bottle loop. Today, a record 78% of all container glass put on the market in Europe is collected for recycling. Once produced, a glass container becomes the main resource to produce new bottles – meaning the more recycled content that can be used, the more we can reduce our need for virgin raw materials.

Already, the average bottle in Europe contains 52% recycled glass, adding up to lowering energy and CO₂ emissions with about 580kg CO₂ saved throughout the supply chain each time one tonne of glass is recycled. That's what makes it "the hidden gem in a carbon-neutral future," to quote international scientific journal Nature²⁶. These benefits are also recognised by consumers, as 91% of Europeans would recommend glass as the best packaging material for environmental and health reasons²⁷.

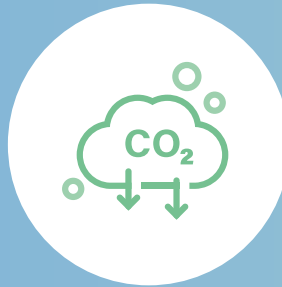
²⁶
²⁷

Nature 599, Glass is the hidden gem in a carbon-neutral future, p.7-8
InSites Consulting/FEVE, Packaging & Recycling survey 2020



Innovating with lighter bottles

When it comes to weighing up sustainable packaging options, one of the criticisms touted by other materials is the question of weight. Yet a growing number of glass container manufacturers have been developing innovative packaging options, such as light-weight containers. By making the glass lighter, while maintaining its quality and strength, manufacturers are improving glass' environmental performance at the same time as helping brand producers and retailers achieve cost savings and lower production and transport impact.

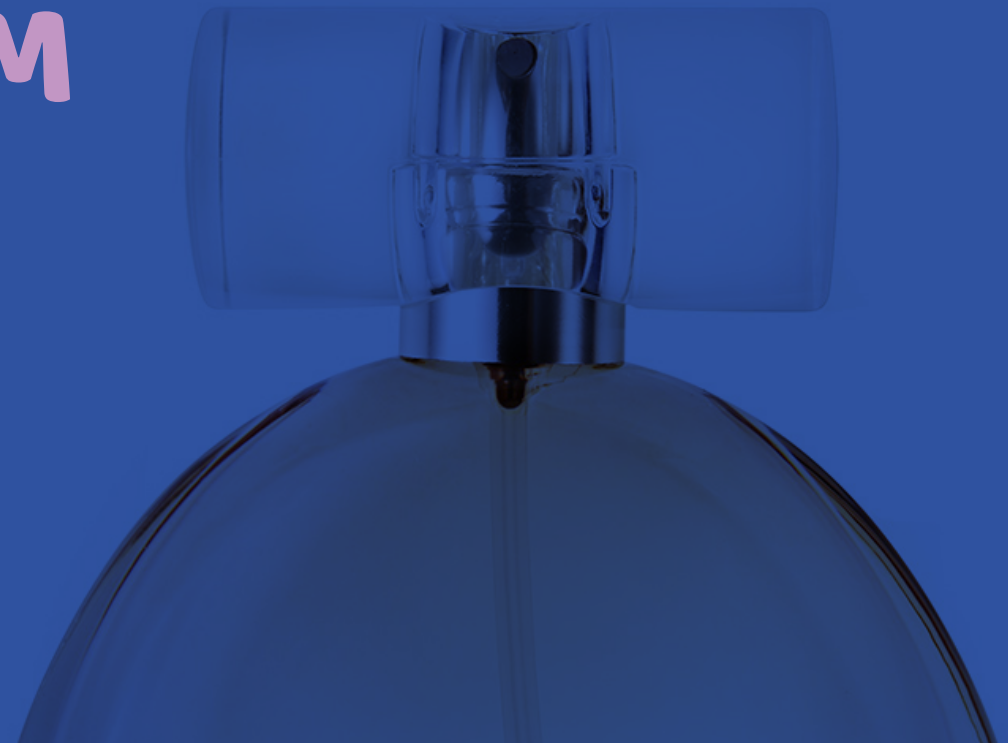


Moving to lower-carbon production

There is no denying that glass has been an energy-intensive industry, but that's all changing as the industry sets its vision on climate neutral production. More efficient furnaces are already on the horizon, with cleaner energy, improved hybrid technology and more use of recycled glass than ever before. They're set to reduce carbon emissions from glass production significantly and they provide a concrete pathway to decarbonisation.

Keen to learn more about what makes glass the best-suited packaging for a climate neutral future? Head to www.glasshallmark.com.

**HOLISTIC HEALTH
STEPS UP A GEAR,
AS WELLNESS
GOES PREMIUM**



For decades, consumers have been shopping for products to help improve their health and fitness, but in recent years, the focus on prioritising our health has expanded beyond the physical to encompass mental and emotional wellbeing. It's no surprise that as COVID-19 spread around the globe, and country after country fell into lockdown, increased social isolation has taken this focus fully mainstream. At the same time, consumer considerations over physical health have also expanded, with hygiene and safety becoming top-of-mind due to the pandemic. These days, health and wellness go hand in hand.

...SO WHAT IMPACT IS THIS HAVING ON BRANDS?

WHAT IT MEANS TO BE WELL

With the stresses of modern living coming increasingly under the spotlight in recent years, the pandemic offered an unprecedented moment for society to stop, take stock, and reconsider our definition of what it means to be well, in all senses of the word.

People of all ages are more proactively addressing their health in a more holistic and personalised manner¹, taking steps to redefine their personal wellness in terms of what it means for their **mind, body and soul**. It's a trend that's set to continue, and it's predicted that in the coming years, consumers will be looking for more products and services that offer mental and emotional health benefits².

**CONSUMERS ARE
LOOKING FOR GOODS
AND SERVICES
THAT OFFER MENTAL
AND EMOTIONAL
HEALTH BENEFITS**

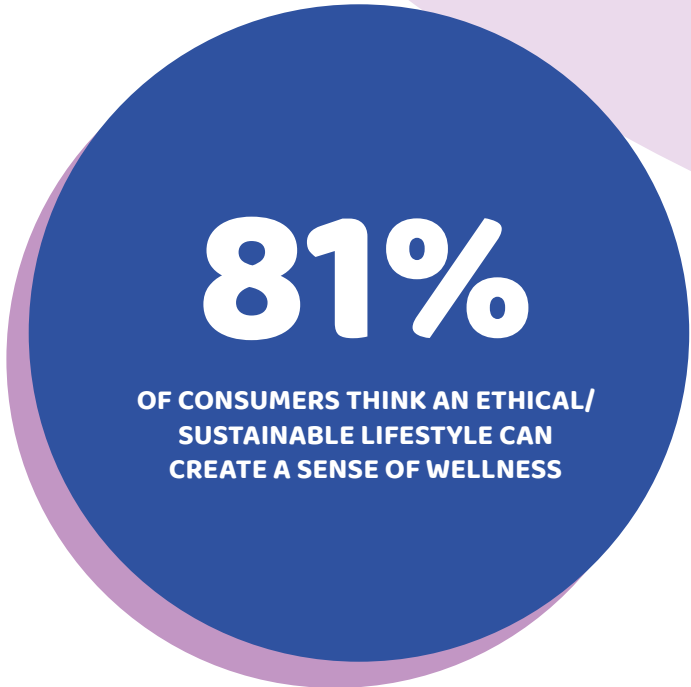
¹ Global Data, GlobalData's TrendSights 2021 – Trends To Watch (p. 4)

² Mintel, Global Food and Drink Trends 2021 (p. 5)

One example is the rapid growth of the **low and no alcohol beverage** category, with the ISWR forecasting total consumption volume of no and low alcohol products to grow by 31% by 2024 across ten key markets in response to increased demand³. Mindful drinking is on the rise, with the emergence of a new group of 'sober curious' consumers⁴ who, much like the 'flexitarians' of the culinary world, are open to seeking out new flavours and experiences in their lives. This growing desire for balance aligns with the prioritisation of sustainability, with 81% of global consumers considering that "living an ethical or sustainable lifestyle" is important in creating a feeling of wellness⁵.

We're looking for **wellness** everywhere we turn, in what we eat, what we drink, and how we interact with the world around us. These habits extend to what we choose to buy, and the creation and curation of this feeling of wellness has a sizeable potential to influence sales. For example, 68% of consumers judged healthy living as 'very' to 'extremely' influential when it comes to deciding what products to buy⁶. For ethical living, it's 44%⁷. Brands should take note of this as these numbers are likely to go only one way: up. The age of wellness is here, and it's not going anywhere.

So, what can companies do to show people their products are healthier and more ethical than others on the market? On top of adapting the content of their products, they would also be well advised to address their packaging. Many consumers favour glass packaging due to its health benefits, such as not leaching chemicals into its contents and its ability to better preserve product quality⁸. This has become more and more relevant as the quality of ingredients, flavour, taste, and origin are increasingly important in the mind of the consumer as they seek to lead more holistic lifestyles⁹.



81%

OF CONSUMERS THINK AN ETHICAL/
SUSTAINABLE LIFESTYLE CAN
CREATE A SENSE OF WELLNESS

3 ISWR, What's driving growth in the no- and low-alcohol space? [Online article]

4 Beverage Daily, Consumers are moving outside their cocktail comfort zones – and that's good news for low to no, says Bacardi [online article]

5 Global Data, TrendSights Analysis: Health & Wellness – 360-Degree Wellness (p. 4)

6 Passport, Voice Of The Industry: Consumer Lifestyles (p. 9)

7 Passport, Voice Of The Industry: Consumer Lifestyles (p. 9)

8 InSites Consulting/FEVE, Packaging & Recycling survey 2020

9 O-I, Consumer Desire for 'Better For You' Beverages Persists Through Pandemic [Blog post]

WELLNESS GOES PREMIUM

When times are lean, mindful spending comes to the forefront. Faced with a downturn as the Covid-19 pandemic took its toll, consumers around the world tightened their belts and shopped more carefully in anticipation of continued uncertain times ahead – following the pattern of past recessions and economic crises. This was reflected across all sectors, and businesses expect further spending shifts from consumers to continue as they take a more frugal approach¹⁰.

Yet although consumers questioned how to spend their money and cut back on some frivolities and luxuries, the long lockdowns led people to allow for **indulgences** within their non-discretionary purchases. They are engaged in what some call ‘revenge shopping’ – excessive shopping to make up for lost time, after several months of being homebound¹¹. One example is staple food products and household goods categories, which were set to have the most positive outlook for 2021 as lockdown home-cooking trends and desires to maintain a pristine living environment continued¹².

**LONG LOCKDOWNS
HAVE LED PEOPLE TO
ENGAGE IN ‘REVENGE
SHOPPING’**

¹⁰ Passport, Voice of the Industry – Consumer Lifestyle (p.16)
¹¹ Euromonitor International, Top 10 Global Consumer Trends 2021 (p. 27)
¹² Global Data, Covid-19 Executive Briefing (p. 48)

At the same time, consumers seek convenience and reliability, and turn to businesses that best prioritise safety while minimising changes in their newly established preferences and shopping patterns¹³. As things move to a new normality, it looks likely that consumers will continue to lean on new-found favourites that make their lives easier while also elevating the ordinary by offering a sense of at-home occasion, turning to innovative packaging, variety packs, smaller sizes, and to-go solutions¹⁴.

In this brave new world, associations of 'wellness' and 'premium' are closely intertwined¹⁵ – meaning that brands that emphasise health and wellness, in everything from sanitation and personal care to mental and emotional wellbeing, are showing particular resilience. One sector standing to benefit from this is the **skincare** market: with many of their usual relaxation and pampering outlets out of bounds, consumers turned to skincare and bodycare to feel good about themselves¹⁶, investing in upgrading their home beauty routines to be more luxurious with

a focus on natural ingredients and premium packaging design. One beauty brand found that as many as 96% of consumers were investing in skincare instead of make-up while the pandemic was at its peak, with many even stock-piling their favourite cleansers and moisturisers in fear of further restrictions¹⁷. As an added bonus, by offering unique designs which evoke the senses, glass packaging allows consumers to embrace a feeling of everyday luxury in their self-care routines while also nodding to raised environmental expectations – which is why many beauty manufacturers are looking to 'de-plasticise' and turn to glass to match the needs of Millennial and Generation Z consumers¹⁸.

GLASS ALLOWS CONSUMERS A FEELING OF EVERYDAY LUXURY IN THEIR SELF-CARE ROUTINES

¹³ Euromonitor International, Top 10 Global Consumer Trends 2021 (p.12)

¹⁴ O-I, Make It Easy, Make it at Home: Pandemic Alcohol Trends That are Here to Stay [Blog post]

¹⁵ Passport, The Coronavirus Era: The "New Normal" – Why Nothing Will Be Normal (p.5)

¹⁶ McKinsey, How COVID-19 is changing the world of beauty (p.5)

¹⁷ InCosmetics Connect, How are cosmetic brands innovating in 2021? [online article]

¹⁸ Beauty Packaging, The Trend Toward 'Glassification' [online article]

**A PRODUCT'S LOOK
AND FEEL HAS
NEVER BEEN MORE
IMPORTANT**

ANOTHER TREND IN PREMIUM WELLNESS WHICH HAS EMERGED OUT OF THE PANDEMIC AND ITS MANY LOCKDOWNS?

We're bringing our favourite restaurant cuisines into our own kitchens, as **home cooking** has taken a new level of importance. Bespoke meal kits and takeaway cocktail sets (otherwise known as 'cocktails by post') are taking over our Instagram feeds, designed by celebrity chefs and famous brands¹⁹. The attraction to these products lies in their healthy ingredients and

'premium' look and provenance. Because of this, meal-kit providers have benefited from an accelerated trend toward healthy at-home cooking²⁰. Affordable premiumisation has the ability to inspire consumers' choices in food and beverages to create restaurant-quality meals at home²¹.

¹⁹ National Geographic, The 12 biggest global food trends for 2021, from vegan innovations to letterbox cocktails [Online article]
²⁰ McKinsey & Company, The great acceleration [Online article]
²¹ Euromonitor International, Top 10 Global Consumer Trends 2021 (p. 44)

PRESENTATION IS EVERYTHING WHEN IT COMES TO FOOD AND BEVERAGES

72%

OF CONSUMERS SAY THAT
A PRODUCT'S PACKAGING
DESIGN INFLUENCES THEIR
PURCHASING DECISIONS

Although we may have upped our game when it comes to our home cooking skills, we haven't turned our backs on how our food and drinks are presented to us. For anyone looking to recreate special occasions in a home environment, a product's **look and feel** has never been more important, whether it's carefully selecting oven-to-table serving dishes to set the atmosphere or iconic bottles as focal points that add a sense of flair to any occasion. While we may not all have the cooking skills of Heston Blumenthal or Alain Ducasse, one way for brands to let the 'wellness' and premium perceptions of their products shine could be with their packaging.

In fact, it turns out that packaging holds the key to our hearts: 72% of consumers say that the design of a product's packaging often influences their purchasing decisions when selecting which products to buy,²² and 50% of global consumers associate stand-out packaging with higher quality and premium products²³. When consumers choose to spend their money on a few, high-quality products, brands should look at their packaging and their materials to see how they make their clients feel. For example, plastic represents a low-quality product for most consumers, which is associated with negative perceptions and feelings²⁴.

²² WGSN, The Power of Packaging (p. 3)

²³ FMCG Gurus, Role of packaging in 2021 [Online article]

²⁴ Journal of Cleaner Production, Food packaging and sustainability - Consumer perception vs. correlated scientific facts: A review (p. 7)



PERSONAL HYGIENE REMAINS A TOP HEALTH CONSIDERATION

The COVID-19 pandemic has added a new, more urgent element to the wellness conversation that was already taking shape over the last few years – turning “Safety Obsessed” from a fringe personality trait into a new wellness movement²⁵.

The fear of infection and increased health awareness have driven demand for more hygienic products and pushed consumers towards contact-less solutions to avoid exposure. Consumers now place significantly more value on food safety and hygiene than in pre-pandemic times²⁶, with almost half of consumers concerned about the safety of product packaging for these products²⁷.

²⁵ Euromonitor International, Top 10 Global Consumer Trends (p. 5)

²⁶ McKinsey & Company, Sustainability in Packaging: Inside the Mind of Global Consumers[Online article]

²⁷ Global Data, GlobalData's TrendSights 2021 – Trends to Watch (p. 7)



**CONSUMERS FIND GLASS
TO BE THE SAFEST PACKAGING,
AS IT IS ALREADY USED IN
MANY HYGIENIC AND
STERILE CONTEXTS**

Though sustainability has remained a top concern of consumers throughout the pandemic, the height of the public health crisis made 45% of European consumers prioritise **hygiene** over sustainability, at least temporarily²⁸. As a reaction to these trends, companies would be wise to implement enhanced safety measures and innovations that target concerns to reassure consumers²⁹. A potential answer in terms of packaging might be glass. Coming directly into contact with food and beverages, product packaging has a clear impact on human health and hygiene. Consumers find it to be the safest packaging, due to its inertness and the fact it is already used in many hygienic and sterile contexts, such as beauty, fragrance and medical products³⁰. What's more, glass is a clear choice for producers looking to cater to consumer desires for a healthier, more holistic lifestyle given its reputation for being the kindest packaging material for the health of the planet and its people.



28 DS Smith & Ipsos MORI, Sustainable Packaging: Has the COVID-10 Pandemic Changed Everything? (p. 9)
29 Euromonitor International, Top 10 Global Consumer Trends (p. 29)
30 FEVE, Flaconnage Survey (p. 6)

GLASS IN THE SPOTLIGHT

GLASS IS THE CLEAR CHOICE FOR HUMAN HEALTH. MADE ENTIRELY OF MATERIALS FOUND IN NATURE, GLASS IS SIMPLE AND DOESN'T POLLUTE THE ENVIRONMENT OR RISK THE HEALTH OF THE PEOPLE WHO RELY ON IT. IT'S ALSO A TRUSTED AND RELIABLE CHOICE FOR THOSE SEEKING WELLNESS: AS AN EVERYDAY PACKAGING MATERIAL, IT IS NATURAL, SUSTAINABLE AND SAFE.



No flavour migration, loss of quality or leaching over time

Glass is the most inert packaging. Made of natural ingredients, there is no risk of harmful chemicals getting into food or drinks packed in glass, and products are preserved for longer in glass, even once opened – no additional barriers or additives needed. Glass does not interact with the product inside, fully protects the quality and provides for a long shelf life. It is also always safe to be used in contact with food no matter how many times it is recycled, making it the most stable of all packaging materials.



The original all-natural packaging

Glass is made of all-natural ingredients. The simple alchemy of sand, soda ash and limestone has worked its magic for thousands of years, and it's here to stay.



A symbol of wellness

The industry has introduced the Glass Hallmark as a symbol of the promise made when choosing glass packaging: to protect the wellbeing of individuals, the planet and society. With wellness top of mind in everything from product to packaging, this important communication tool reminds consumers of the health and sustainability benefits of choosing glass.

CONSCIOUSLY QUESTIONING CONSUMPTION



For a long time, sustainability has been a synonym for good environmental practices. In recent years, this understanding has been widened to include responsible stewardship across all aspects of society: promoting health, connecting to communities, and making a positive impact on the world around us. People who adopt a sustainable lifestyle are considering their individual impact on a broader range of social, ethical concerns – which is, in turn, having a growing impact on their shopping habits.

...SO WHAT ARE THE OPPORTUNITIES AND CHALLENGES AHEAD FOR BRANDS?



PURCHASING CHOICES AFFIRM CONSUMER IDENTITY

We all want to feel that our choices have an impact. Consumers are increasingly attracted to a purpose over profit model, a system that includes a fair economic model which does not exploit nature or people¹.

The events of 2020-21 have accelerated this trend, with news stories examining the disparate ways the COVID-19 pandemic affected different communities and regions plus coverage of racial injustice that has amplified the discussion on diversity, equity and inclusion. This post-pandemic mindset has been called “**building back better**” and has coincided with a rise in activism, a desire to reconnect with nature and the community, and a resistance to the old way of doing things².

¹ Passport, The Coronavirus Era: The “New Normal” – Why Nothing Will Be Normal (p. 5)
² Passport, The Coronavirus Era: The “New Normal” – Why Nothing Will Be Normal (p. 5)

The numbers support this 'new normal', with 79% of consumers changing purchase preference based on the social responsibility, inclusiveness or environmental impact of their purchases³. Additionally, almost 70% of shoppers prefer to buy products from companies that are seen to be fair and transparent, respectful of the environment, use recyclable packaging and, in the case of food and beverage brands, have low food miles⁴.

Consumers are asking that companies move beyond simply caring about profit; protecting the health and interest of society and the planet is the next expectation. A growing number of people feel that brands should not only help reshape the world, but also look at companies as having the potential to make a difference in the world⁵, moving from a volume- to a value-driven economy that includes stopping social inequity and environmental damage⁶.

For their part, brands have a chance to capitalise on this growing movement, as 58% of consumers are more concerned about how and where brands source their products and services⁷ and 31% of consumers buy from brands that support their social and political values⁸. Brands with a clearly defined holistic sustainability strategy are already reaping the rewards, with 77% of organisations saying their sustainability approaches increase customer loyalty and 63% seeing a revenue uptick⁹.

3 CapGemini, How sustainability is fundamentally changing consumer preferences (p. 2)

4 WARC, The Rise of Conscious Consumerism and its Impact on the FMCG Sector (p. 2)

5 Mintel, Global Food and Drink Trends (p. 23)

6 Passport, The Coronavirus Era: The "New Normal" – Why Nothing Will Be Normal (p. 5)

7 Euromonitor International, Top 10 Global Consumer Trends 2021

8 Euromonitor International, Top 10 Global Consumer Trends 2021 (p. 4)

9 Capgemini, How sustainability is fundamentally changing consumer preferences (p. 2)



**CONSUMERS ARE
INCREASINGLY
ATTRACTED TO A
PURPOSE OVER
PROFIT MODEL**

CONSUMERS REWARD SUSTAINABLE BRANDS

It used to be that when someone bought a product, all they cared about was what they could see on the shelf. While shelf appeal continues to be a factor, the times when this was the only factor at play are long gone: for today's consumers, it's all about the real-world impact of their purchases.

This newfound concern for consumer impact has widespread ramifications for brands. Now that consumers are better informed about how products are made and what happens when they discard them, they have started more carefully scrutinising their purchases. Many are going 'zero waste', prompting a movement where consumers work to avoid using non-recyclable materials and instead bulk buy or rely on re-usable containers¹⁰. This has led to consumers rewarding certain brands, flocking to companies that don't shy away from the responsibility of reducing the environmental footprint of their products¹¹.

**FOR TODAY'S
CONSUMERS, IT'S ALL
ABOUT THE REAL-
WORLD IMPACT OF
THEIR PURCHASES**

¹⁰ Trendhunter, Trend Report 2021 (p. 74)
¹¹ Trendhunter, Trend Report 2021 (p. 74)

SUSTAINABLE PURCHASING CONCERNS REMAIN HIGH ALSO FOR ONLINE SHOPPERS

Though consumers are increasingly **shopping online** as lockdown shopping habits seem set to stay, this hasn't stopped them from considering the impact of their purchases. More people have turned to e-commerce since the lockdown, with 66% of Europeans stating they shop online more since the initial March 2020 lockdown, and 82% planning to continue to do their shopping online or increase it due to its convenience¹². The main reasons for continuing to shop online include time savings (59%), personal safety (49%) and avoiding impulse purchases (31%)¹³.

Nevertheless, sustainable purchasing concerns remain high for online shoppers just as much as for their in-store counterparts. The increased demand for e-commerce has resulted in shifting consumers' perceptions of packaging and waste. As a result of activism, regulations and the spreading of information, consumers have been made aware of the packaging sector's large environmental footprint¹⁴. Almost half (43%) of adult consumers who e-shopped wanted brands to use sustainable packaging, while 41.1% wanted clarity about the origin and delivery chain of what they bought. And when it comes to manufacturing itself, more than one-third (34.5%) wanted to know that it was done sustainably¹⁵.

¹² Circular Online, Brands that fail to make online shopping eco-friendly could get 'left behind' [Online article]

¹³ PowerReviews, Consumer Survey: The Evolution of the Modern Grocery Shopper [Online article]

¹⁴ Billerudkorsnäs, Key Packaging Trends 2021: Beyond the Global Pandemic (p. 8)

¹⁵ EMarketer, Sustainability in e-commerce 2021 (p. 7)



PRODUCT PACKAGING IS KEY TO COMMUNICATING SUSTAINABILITY TO END USERS

Younger consumers are at the forefront of this trend, as they are more likely to make decisions based on their impact on society, but they are by no means alone: 62% of younger consumers prefer to shop for sustainable and green products, compared to 53% of middle-aged consumers and 44% for older consumers¹⁶.

In order to keep the loyalty of sustainability-orientated consumers and ensure that they stay on a growth trajectory, brands need to respond to these trends and demonstrate their own commitment to a limited environmental impact. One area that has seen a lot of attention is product packaging. Already a high priority pre-pandemic, it is now seen as key in advancing corporate goals of circularity and waste and emissions reductions¹⁷ and can be used as an effective way to communicate sustainability to end users¹⁸. One readily available packaging material for brands¹⁹ to consider? Glass – because in addition to being infinitely recyclable in a closed bottle-to-bottle loop, glass can be infinitely reused and refilled without any loss of quality.

¹⁶ Shopify, Future of Commerce (p. 8)

¹⁷ Passport, From sustainability to purpose: Refocus on the plane (p. 21)

¹⁸ Billerudkorsnäs, Key Packaging Trends 2021: Beyond the Global Pandemic (p. 12)

¹⁹ WGSN, 10 Key Trends for 2020 (p. 3)

LOVING LOCAL: PEOPLE LOOK TO GROUND THEMSELVES IN COMMUNITY

The rising stress and uncertainty in consumers' lives and the world around them have led them to value safety, tradition and simplicity²⁰. With lockdowns and economic downturns never far from memory, the fragility of local communities has been highlighted by COVID-19.

As a result, supporting **small or local businesses** has become more important to over half of consumers,²¹ with 68% wanting to increase use of local products – they consider them to be a perfect blend of “safe” and “sustainable”²². 65% of consumers order directly from a local grocery store, making it the most popular way to shop for groceries online, as opposed to – for example – online only ordering services like Instacart or Amazon Fresh²³. Businesses have mirrored this change of attitude, with nearly two thirds of food and drink industry professionals defining sustainability as supporting local communities, a 15% increase from 2019²⁴.

20 Global Data, GlobalData's TrendSights 2021 – Trends To Watch (p. 4)

21 Global Data, GlobalData's TrendSights 2021 – Trends To Watch (p. 9)

22 Capgemini, How sustainability is fundamentally changing consumer preferences (p. 2)

23 PowerReviews, Consumer Survey: The Evolution of the Modern Grocery Shopper [Online article]

24 Euromonitor, Voice of the Industry: Sustainability survey, 2020 – cited in Euromonitor, From Sustainability to Purpose: Refocus on the Planet (p. 4)

68%

**CONSIDER LOCAL PRODUCTS
AS A PERFECT BLEND OF “SAFE”
AND “SUSTAINABLE”**

PEOPLE SEEK NEW WAYS TO CONNECT WITH THOSE WHO SHARE THEIR VALUES

Consumers increasingly look to community as a focal point for Corporate Social Responsibility²⁵. From supporting local businesses to frequenting farmers' markets, we're also keen to rebuild a sense of connection with our community by purchasing goods and products that are made in the area, not just to strengthen local economies but to reduce the environmental impact of our consumption. Consumers have a renewed appreciation for connection and support and are in search of new ways to create authentic connections with others who share their values. Brands, in turn, can bring consumers together in communities and introduce collective ways to make a difference²⁶.

While consumers are still most likely to shop at traditional big box retailers and marketplaces than other businesses, their habits may change going forward in favour of independent and local businesses²⁷. In fact, for consumers in Germany, 35% say their main reason to shop locally is to reduce their environmental impact, rising to 44% in France – a trend that's been noted by almost a quarter of all consumers surveyed²⁸. Even with increased online shopping, people seem to favour local online marketplaces²⁹. Brands have caught on to this and are using social media and local inventory ad campaigns to incite customers to stay local, even when buying online³⁰.

25 Mintel, Global Food and Drink Trends 2021 (p. 18)

26 Mintel, Global Food and Drink Trends 2021 (p. 20-22)

27 Shopify, Future of Commerce (p. 18-25)

28 Shopify, Future of Commerce (p. 25)

29 Highstreet.io, 5 Trends that will Change the eCommerce Sector in 2021 [Online article]

30 Highstreet.io, 5 Trends that will Change the eCommerce Sector in 2021 [Online article]



**CONCERNS ABOUT THE
ENVIRONMENT ARE ALSO
DRIVING THIS TREND**

The background of the slide is a photograph of a glass bottle production line. Rows of clear glass bottles are moving along a conveyor belt. The scene is industrial, with yellow overhead cranes and various mechanical components visible. A large, semi-transparent blue circle is positioned on the right side of the image, containing white text. A white curved shape is on the left side, containing a paragraph of text.

Locally sourced ingredients have become more important to over half of consumers, and 63% report finding low-carbon-footprint food and drink appealing. For European brands, choosing glass packaging can be another way to emphasise the local origins of their products. Glass production is a local industry by nature, counting 162 manufacturing plants in 23 European countries and employing more than 125,000 people across the whole value chain, making it one of the largest glass container production centres in the world.

CONSUMERS LOOK FOR PRODUCTS WITH LOCAL ORIGINS

GLASS IN THE SPOTLIGHT

WITH ENDLESS LIVES, GLASS IS AN EXEMPLAR OF SUSTAINABLE CIRCULARITY AND CONSCIOUS CONSUMPTION. IN ADDITION TO ITS STRONG ENVIRONMENTAL CREDENTIALS, THE GLASS INDUSTRY CONTRIBUTES TO THRIVING LOCAL CIRCULAR ECONOMIES, PROVIDING LOCAL JOBS SUPPORTED BY RESILIENT LOCAL SUPPLY CHAINS, ALL FOUNDED ON A LONGSTANDING CULTURAL HERITAGE OF EUROPEAN GLASSMAKING DATING BACK THOUSANDS OF YEARS.



Driving the circular economy

The industry – a long-time leader in circularity – is convening stakeholders across the entire glass value chain to 'Close the Glass Loop' and drive a 90% collection rate of glass by 2030 to make our circular economy work better.



Offering packaging choices that work for the market

Glass is the only packaging that's both reusable and infinitely recyclable. While recyclable bottles can be filled by customers, and shipped, sold and recycled all over the world, returnable or refillable bottles can be a better solution for local artisanal production. With glass, both options are on the table.

STAYING COMPETITIVE: WHY BRANDS WILL NEED TO CHANGE

Having seen how much consumer trends have changed in recent years, it's clear that brands will have to change to meet the new demands. Those businesses that have already started doing so – banking on eco-credentials, wellness or circular societal impacts – have remained more resilient in a time of great uncertainty.

Keeping these trends in mind, there are a few takeaways for brands to consider in order to maintain their competitive edge:

COMMUNICATE HOW YOUR PRODUCT & PACKAGING HELP CONSUMERS LIVE IN LINE WITH THEIR VALUES

With consumers increasingly scrutinising the actions of the companies they purchase from, it is more important than ever for brands to communicate proactively on the issues consumers care about most – primarily, health and sustainability. Brands must meet consumers where they are with these messages – be it online, on social media, in store – or, of course – on pack.

**SIGNAL YOUR
SUSTAINABILITY
COMMITMENTS TO
CONSUMERS BY
INCLUDING THE GLASS
HALLMARK ON YOUR
PACKAGING AND
COMMUNICATIONS
MATERIALS.**

CONSIDER THE WHOLE LIFECYCLE

More than ever, consumers expect businesses to do more to help them make sustainable choices – from purchase to disposal. Consumers are increasingly considering end-of-life implications before making purchases.

**MAKE IT EASY FOR CONSUMERS
TO KNOW WHAT WILL HAPPEN TO
YOUR PRODUCT OR ITS PACKAGING,
SO THEY CAN BE REASSURED
ABOUT ITS LONG-TERM IMPACT,
AND HELP DRIVE GLASS RECYCLING
RATES BY JOINING CLOSE THE
GLASS LOOP.**

REVIEW YOUR PACKAGING PORTFOLIO

Take an honest look at your packaging portfolio. How does it stack up against these key trends on environmental sustainability, health and wellness and circularity? How is your packaging mix perceived by consumers? What steps could you take to minimise reputational risk and maximise attractiveness in the marketplace?

**CHOOSE TO PACKAGE
IN GLASS TO ENHANCE
YOUR SUSTAINABILITY
FOOTPRINT - NOW AND
INTO THE FUTURE.**

RESEARCH PARAMETERS

It's no understatement to say that all of us interact with glass packaging on a daily basis. As the shared voice of European container glass manufacturers, FEVE works on behalf of companies producing packaging for food, beverage, perfumery, cosmetics, pharmacy and beyond. Whether bottles, jars, flacons or vials, our members produce over 80 billion glass containers per year – making us a key touchpoint for consumer goods. That's why we work with brands around the world to provide glass packaging that's safe, sustainable and fit for the future.

As part of this partnership, we set out to build a database of emerging trends from markets across Europe to understand how consumer trends are shaping purchasing behaviour, and how brands can respond to that to help shape a more sustainable future. We examined over 150 reports from leading global research firms to reveal how a new generation of consumers are interacting with products and packaging as they go about their lives. Combined, these reports covered tens of thousands of consumers surveyed across a number of countries, mostly in Europe and North America, offering a convincing snapshot of how people are evolving their habits, no matter where they're from. Research was conducted from **June-December 2021** and drawn from reports produced between 2018 and 2021. On the basis of this work, we've rounded up of some of the key trends that are set to influence consumer choices over the coming years.

For a full list of sources referenced in this trends report, see below. All research remains the property of their original owners.

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This report was produced by members of the
European Container Glass Federation.

For further information on how glass packaging
can enhance your company's sustainability
footprint, please visit:

www.glasshallmark.com



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