

Recycled Cartonboard in European Markets

Demand, attitudes and trends: Insights from the 2025 survey



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Methodology

Online Survey

The online survey was commissioned by Weid, MM and RdM and conducted between 9 and 21 December 2025. Overall, 6149 respondents were surveyed, spread evenly across six countries.

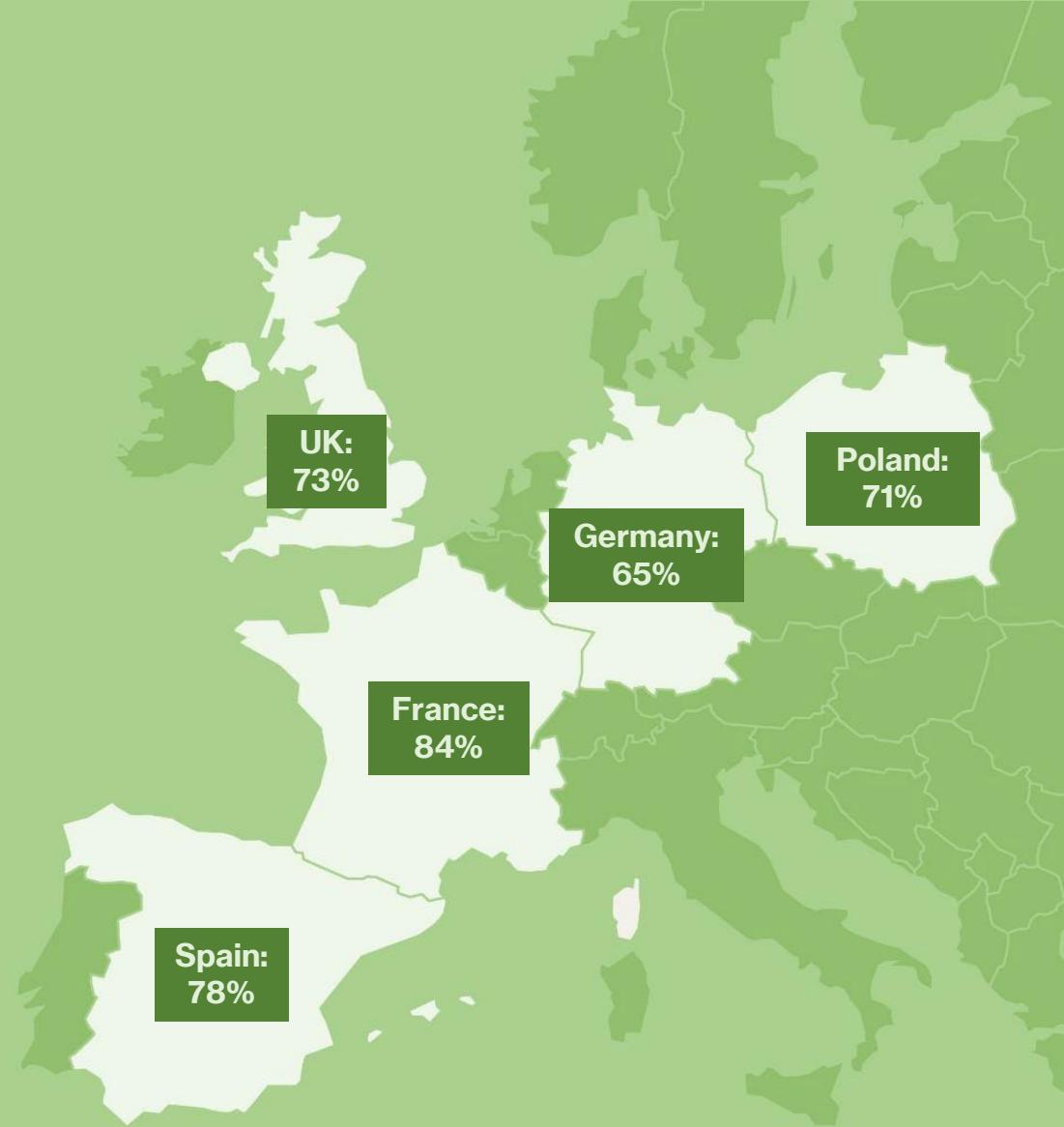
Panel Quality Control

Data quality checks were used from the outset of the survey, including automated QA application to flag poor quality responses and automatic (bot) responses, as well as manual checks into the dataset itself.

Geolocation was also used, to ensure that all participants were based in the correct nation

Sustainability is a baseline expectation

Sustainability is important to an average of 75% of respondents polled.



Who does sustainability matter to most?

Young people feel more strongly

77% of under 44s say it is **important** but here strength of feeling is also important to note - 33 percent of under 44s rate it as **very important** compared to 28 percent of over 44s.



It matters to high earners too

80% of people earning over €5000 a month said it was **important** and 38% said it was **very important**.



Packaging is central to sustainability

What topics come to mind when consumers think of sustainability?



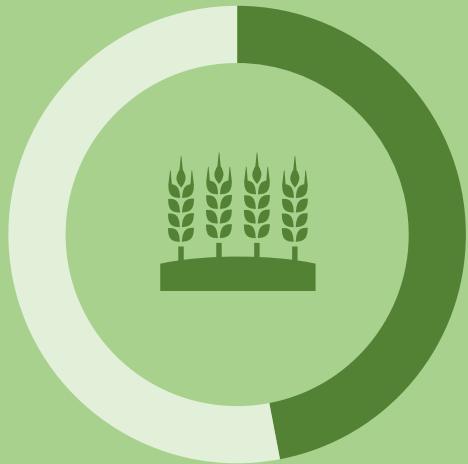
70%

Climate & environment



55%

Packaging & recycling



47%

Food & agriculture



43%

Energy & mobility

Packaging and recycling is top of consumer minds!

Packaging is a sales driver.

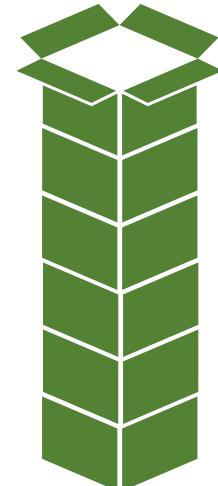
43% pay regular attention to packaging and 48% sometimes do - 91% of all consumers notice the packaging. This is perhaps not a surprise.

What is crucial to note is that: **66% of people's purchasing decisions are affected by the sustainability of packaging either very strongly or somewhat strongly. Whether consumers buy your products or not can come down to this. It's vital to get it right.**

Are your purchasing decisions affected by the sustainability of packaging, either strongly or somewhat strongly?

Yes

66%



No

34%



Brand choice...

In the last 12 months, 45% of people have deliberately chosen a brand because of its packaging.

The youngest demographic (18 to 29) were particularly susceptible with 59% of them admitting they chose products based on packaging.

This also grows through earnings - people earning less than €1000 polled 41% and those earning over €5000 were more than a full ten percentage points higher at 52%.





...and brand rejection.

Packaging sustainability does not just win customers – it actively loses them when done badly.

In the last year, 38% of respondents have stopped buying a product because of concerns about packaging.

High earners will pay more for sustainably packaged products.

44% of those earning over €4000 have stopped buying a product because of concerns over the environmental cost of packaging.

This is backed up by other studies such as PWCs “Voice of The Consumer” report which shows that consumers are willing to spend 9.7% more for sustainability - if the money is there.

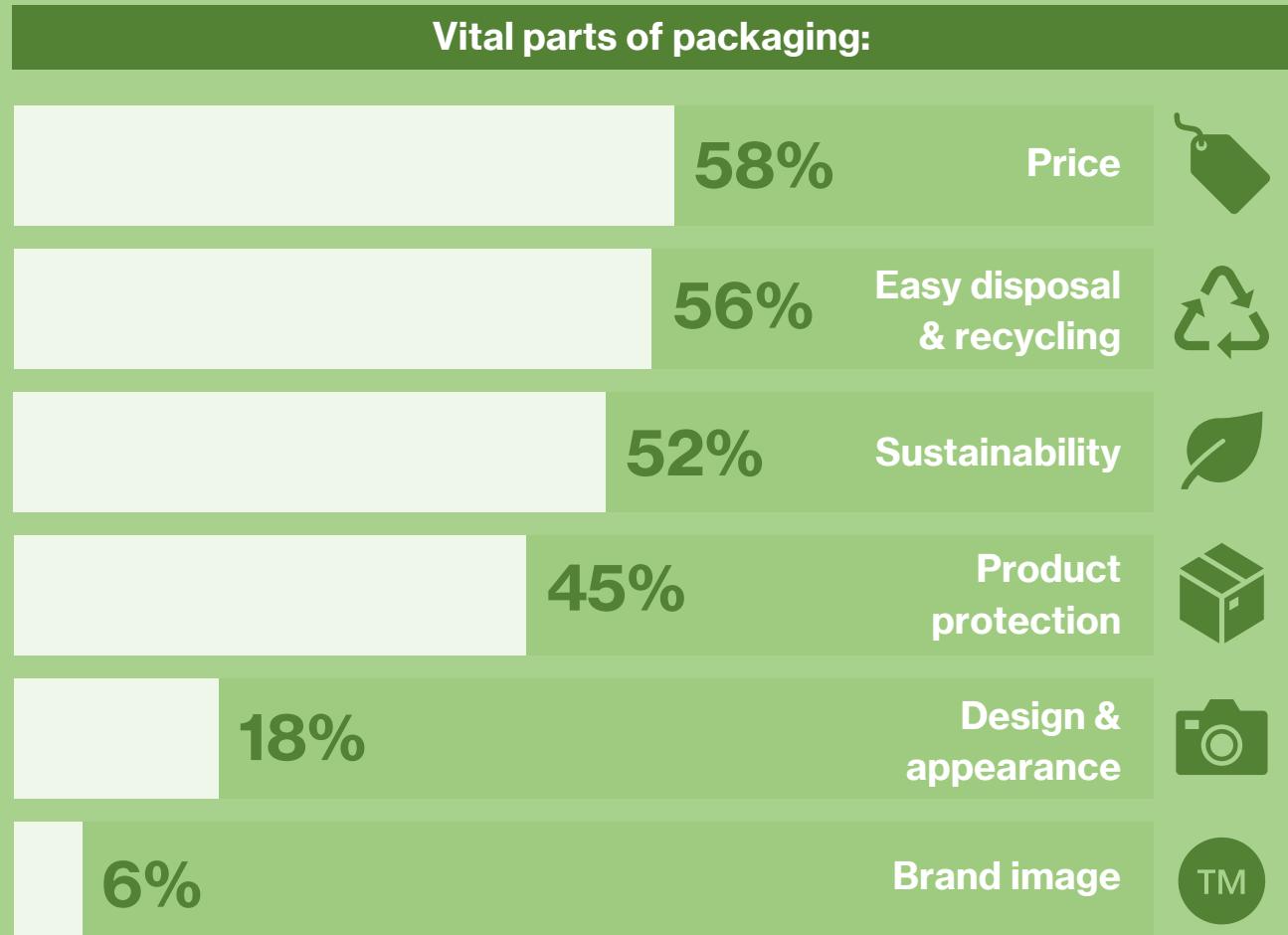
<https://www.pwc.com/gx/en/news-room/press-releases/2024/pwc-2024-voice-of-consumer-survey.html>



Functional priorities come first

Recycling and sustainability are important to over half of European consumers. Taking price out - they are THE most important factor, far above design or appearance.

Sustainability and recyclability outrank design and brand image.



Knowledge gaps are an issue.

There is room for more consumer education - just over half - 54% - said they knew the difference between recycled and virgin cartonboard - Italy being the most knowledgeable with 66% and UK the least (43%).

Resistance to recycled cartonboard is driven by uncertainty, not rejection.

The major concern about recycled cartonboard is hygiene.



1. **Hygiene** – 36%
2. **Quality** – 35%
3. **No disadvantages** – 30%
4. **Price** – 28%
5. **Design** – 19%



Consumers like labelling

This logo scored **7.3** in terms of trustworthiness.

70 percent would prefer a product which has a logo like this to one which didn't, and 81 percent say it would increase overall trust.

Logos increase trust, preference, and perceived responsibility.

Recycled cartonboard is already popular

69% go for recycled over virgin cartonboard when offered the same packaging.

Preferred exterior packaging materials:



44%
Recycled cartonboard



21%
Glass



10%
Virgin cartonboard



8%
Plastic



2%
Metal

Recycled cartonboard is top in every nation. It is twice as popular as glass.

Recycled cardboard as reputation multiplier:

A third (33%) say that a brand using recycled cartonboard would be **much more responsible** than one using virgin cartonboard and 47% say it would appear somewhat more.

That means **four out of five consumers** believe that brands using recycled cartonboard appear more responsible.

Visible signs of recycled cartonboard use would help brands show their environmental credentials and be seen as responsible by 80% of the population.



Demographic Breakdowns



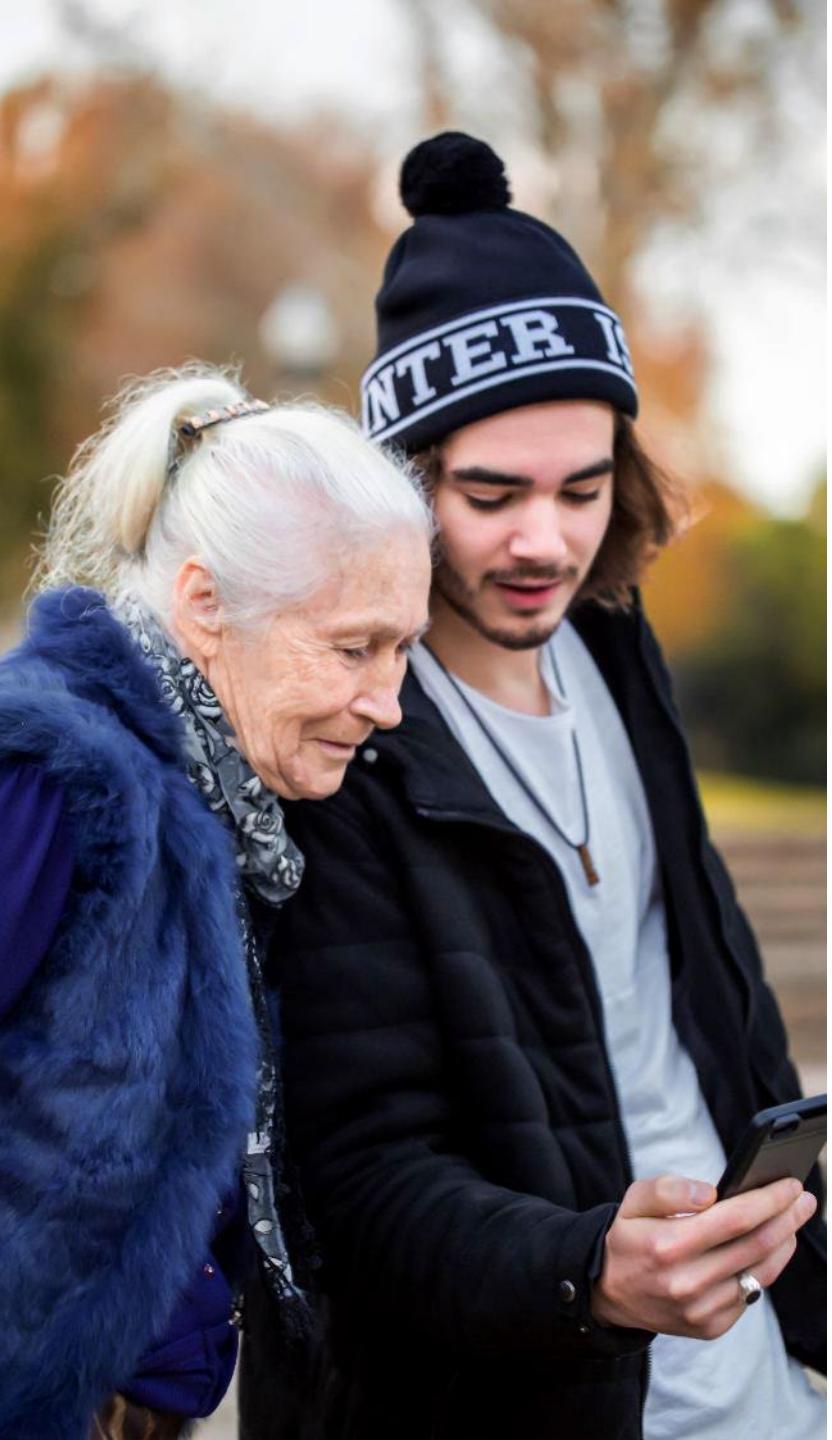


Gender

Gender breakdowns were small and in general both males and females had the same attitudes towards recycling and packaging - women were very mildly more likely to feel strongly that packaging sustainability influenced their purchasing 18% compared to 19%.

Women were also slightly more likely to pick recycled cardboard over virgin cardboard compared to men (71% to 68%).

But all-in-all, the results were very consistent.



Age

Young people were more susceptible to change brands because of concerns about packaging - 53% compared to 38% overall and just 22% of over 60s. If brands are looking to engage younger consumers, then sustainable packaging is a useful tool.

This is backed up by the fact that they are most likely to feel strongly that sustainability of packaging influences their purchases. 22% feel very strongly and 51% somewhat strongly - 73% say that their purchases are influenced by sustainability of packaging - higher than the 66% overall.



Education

In general terms the importance of packaging grows in correlation with education levels. For example, 37% of people with compulsory education alone have stopped buying a product because of concerns over packaging in the last 12 months whereas 62% percent of people with doctoral degrees have.

However, there is almost certainly an effect from income here too. If less education means lower earnings, then people have less time/money to choose brands.

Given the choice of all packaging materials, all things being equal, lower education brackets will still choose recycled cartonboard at almost the same rate as those with degrees - 42% compared to 45% of those with degrees.



Earnings

As touched on above, high earners are the most keen on sustainability.

And this attitude means that they are also willing to pick recycled cartonboard. Particularly those earning €4000 a month and more. 75% of them choose recycled cartonboard over virgin cartonboard compared to just 62% of those earning €1000 or less.

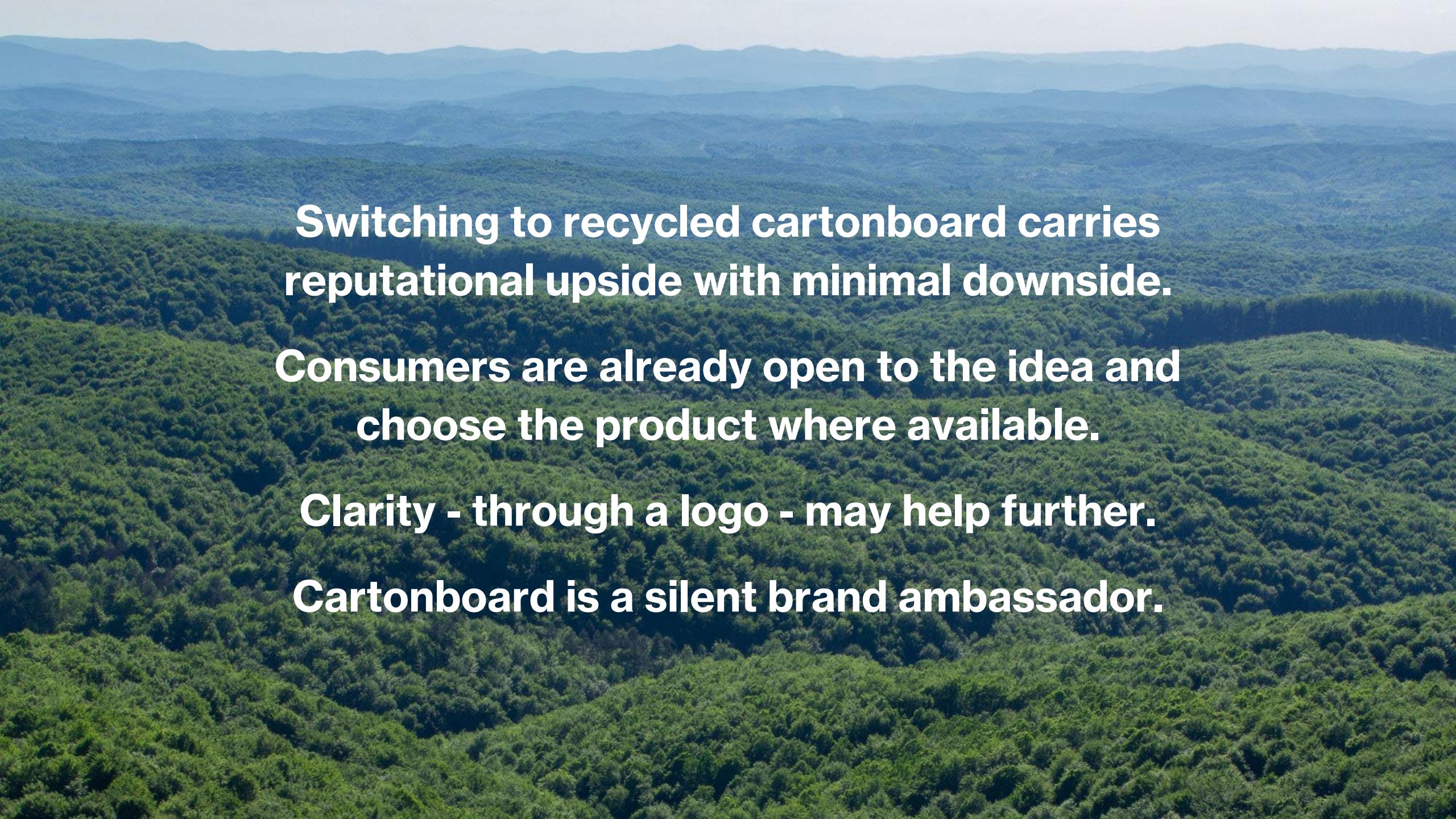
84% believe that a brand using recycled cartonboard would be much more responsible than one using virgin cartonboard - a four percentage point increase on the general population.



Countries

The results show the consumer's openness and positive attitude towards sustainability and recycled packaging. It is also encouraging to note that this is a cross-European trend.

It was rare to find a ten percent difference between nations. The UK and Poland were mildly more inelastic than other nations when it came to packaging concerns but in general the same trends spread across the countries.



Switching to recycled cartonboard carries reputational upside with minimal downside.

Consumers are already open to the idea and choose the product where available.

Clarity - through a logo - may help further.

Cartonboard is a silent brand ambassador.



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