

The Future of Sustainable Personal Care Packaging

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Abstracts

Introduction

Well over half of consumers across 20 nations consider grocery products to be over-packaged. Although this sentiment varies depending on product sector, it is symptomatic of intensifying pressure for the packaging industry to develop more sustainable solutions across the supply chain. In short, sustainability remains an industry defining issue for packagers and their customers

Features and benefits

Obtain 'evidence-led insight': access multiple waves of primary consumers research data to support improved decision making

Develop compelling 'on-trend' products: better meet alcoholic beverage consumers' packaging expectations with highly valued packaging features

Opportunity profiling: identify industry sentiment, consumer segments and best practice to better capitalize on an industry defining trend

Highlights

Widespread environmental concerns are driving the sustainable packaging agenda. Indicative of just how significant the issue has become, about two-thirds of consumers globally are willing to endure some degree of economic burden to protect the environment, a finding made even more relevant in the context of the global economic crisis. Negative public perceptions of packaging have driven much of the sustainable packaging debate so far. Packaging is often seen as a burden to consumers and the

environment (with French and UK consumers most likely to perceive grocery products to be over-packaged), thereby elevating the importance of sustainability in the 'packaging mix'. Minimizing the environment burden is just one of a number of important features determining how consumers will judge packaging. Nevertheless, claims associated with more sustainable forms of packaging, such as 'reduced packaging' and 'recyclable/compostable', exert a favorable influence on consumers' product evaluations

Your key questions answered

What proportion of consumers consider personal care products to be over-packaged?

What proportion of consumers act on their sustainable packaging concerns by changing the purchase choices?

How does the issue of sustainable packaging in the personal care sector compare to other CPG sectors?

What approaches have producers across the CPG spectrum pursued as best practice solutions to sustainable packaging provision?

What can I do to better communicate sustainable packaging efforts to the consumer?

Contents

OVERVIEW

Catalyst
Summary

THE FUTURE DECODED

INTRODUCTION: Intensifying pressure exists for the packaging industry to develop more sustainable solutions across the supply chain

This is one of four sector specific reports covering sustainable packaging

Sustainability captures a broad range of social, environmental and economic issues

Sustainability remains an industry defining issue for packagers and their customers

Sustainable packaging can involve a number of things, particularly as it is an evolving concept

Key takeouts and implications: packagers and their customers must be seen to be proactively addressing sustainability

TREND: Widespread environmental concerns are driving the sustainable packaging agenda

Majorities of global citizens express concerns about climate change and protecting the environment

The extent to which individuals feel truly informed about environmental issues, including their own behavioral impact, is typically lower than expressed concern

Key takeouts and implications: with ethical and environmental issues remaining a top priority for global consumers in the coming years, packagers and their customers must act accordingly

TREND: Consumers are becoming more sensitive to sustainable packaging issues and perceive grocery products to be over-packaged

Packaging and associated waste is an important 'green' issue for consumers

Consumers think grocery products are generally over-packaged, although this perception has subsided slightly in recent years

Consumers expect retail/consumer companies in particular to make a positive environmental impact with measures such as minimizing packaging or using recyclable materials

Food and beverage packaging suffers more than other consumer packaged good formats from the perception of over-packaging

Key takeouts and implications: packaging is often seen as a burden to consumers and the environment, thereby elevating the importance of sustainability in the 'packaging

mix'

TREND: Heightened sensitivity to the environmental impact of packaging is influencing consumer behavior

Consumers are reflecting on their own behavior in light of escalating ethical consciousness

A more self-reflective outlook towards environmental issues is apparent from consumers' attentiveness towards environmentally aligned packaging attributes

Claims associated with more sustainable forms of packaging, such as 'reduced packaging' and 'recyclable/compostable', exert a favorable influence on consumers' product evaluations

Given the ongoing societal emphasis on recycling, packaging is at the forefront of consumers' environmentally-driven behavior

Key takeouts and implications: environmentally conscious consumers want to purchase high-integrity products in packaging that reflects their desire to minimize environmental impact

INSIGHT: A small segment of personal care consumers are influenced by, and acting upon, sustainable packaging concerns

Around 20-30% of consumers perceive packaging volumes to influence the personal care choices that they make

Key takeouts and implications: a segment of consumers, albeit a small one, is heavily guided by their considerations for waste, when making personal care purchases

INSIGHT: Sustainability aligned benefits do not feature among the top three attributes consumers value from grocery product packaging

Minimizing the environmental burden is just one of a number of important features determining how consumers will judge packaging

Informing and protecting are the two most important packaging functions valued by consumers

Consumers are not willing to compromise hygiene and protection for environmental benefits, but do not automatically assume reduced packaging to compromise product quality

The de-prioritization of environmental benefits in packaging highlights just how important it is that ethically positioned personal care products offer practical benefits

Mini case study: the experience of Frito-Lay's Sun Chips brand packaging in 2009–10 demonstrates the need to focus on the full packaging experience, and not just sustainability in isolation

Key takeouts and implications: environmental considerations are secondary in driving packaging preferences so developers need to balance the need for a wide range of features and benefits

INSIGHT: Sustainable packaging concerns align well with consumers' desire to 'de-

clutter'

Living a less complicated, clutter-free lifestyle is an important aspiration for many global citizens

A relatively strong sentiment exists among global citizens about the need to consume less in order to improve the environment for future generations

Key takeouts and implications: many consumers are increasingly seeking to simplify life and will value products that align to this ideology

INSIGHT: Concerns about sustainable packaging potentially conflict with desire for more product information

A high and growing proportion of consumers express some level of concern about ingredients used in conventional beauty products

The desire shown by consumers to understand sourcing and ingredient issues has created the need for clear, informative labeling

Authenticity-seeking consumers are holding brands accountable to more exacting, authentic standards

The need to communicate a sustainability comparative advantage, as well as wider social marketing efforts, means that package labels can be important marketing communication cues

Key takeouts and implications: in the pursuit of more sustainable forms of packaging, industry players must not lose sight of the important communication role the package performs

ACTION POINTS

ACTION: Contribute to broader efforts to educate consumers about the merits of packaging and, in particular, sustainable packaging design

Commit to, and communicate, measurable goals in sustainable packaging

Communicate the positive sustainable outcomes facilitated by core packaging functions by ensuring that improved sustainability benefits co-exist with other functionality that consumers value

Use packaging to highlight brands' ethical credentials, particularly sustainability causes that it supports

ACTION: Ensure that the sustainability profile of packaging continually improves by evaluating all the routes towards sustainable personal care packaging

Make decisions that work for individual brands and territories in question, but adopt a holistic approach that meets a number of the sustainable packaging principles

Adopt a 'frustration-free' philosophy to sustainable packaging design

Ensure vigilance and best practice in the ethical sourcing of packaging products

Remove and/or reduce packaging materials, especially more environmentally sensitive

ones, needed to house personal care products

Use recycled content and increase recyclability of personal care packaging

Innovate and develop commercially viable packaging using alternative materials in order to help minimize raw material use

Increase the reuse potential of personal care packaging

Ensure decisions are viewed in terms of the entire life-cycle of the package

Use Datamonitor's Product Launch Analytics (PLA) and Pack Track innovation tools to monitor the ongoing evolution in sustainable packaging innovation both within and outside your category and country

ACTION: Market more sustainably packaged personal care products as a positive lifestyle choice

Stress individual choice along with environmental benefits and focus on the 'designed in' personal benefit

Recruit passionate advocates to leverage the viral effect that is possible with compelling sustainability-led product and marketing concepts

Communicate the positive aspects of environmentalism when marketing packaging sustainability

Use ethicality and environmentalism to leverage brand authenticity

APPENDIX

Definitions

Supplementary data

Consumer survey data

Waste and recycling data

Methodology

Further reading and references

Ask the analyst

Datamonitor consulting

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