

ATTITUDES TOWARDS SUSTAINABILITY IN BPC – GERMANY – 2022

Purchasing of sustainable BPC is flat, but NPD is at an all-time high. Consumers rely on corporations and financial rewards to nudge them towards 'greener' habits.



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Attitudes Towards Sustainability In BPC - Germany - 2022

This report looks at the following areas:

- Sustainable behaviours adopted by consumers, most notably bringing their own bags when shopping
- Purchase of eco-friendly BPC products which saw little change compared with 2020
- Usage of and interest in using BPC refill concepts, with refill pouches coming out on top
- Barriers to using refills including lack of availability and convenience
- Developments in sustainable launch activity and innovation in BPC
- Attitudes towards sustainability, many of which are coloured by anticipatory anxiety



Purchasing of sustainable BPC is flat, but NPD is at an all-time high. Consumers rely on corporations and financial rewards to nudge them towards 'greener' habits.

Overview

Younger consumers are not the sole demographic interested in sustainable living: Over-55s **are in fact more likely than average to recycle household packaging (81% vs 63%) and shop locally all the time (51% vs 38%)**. For them, interest in sustainability doesn't constitute a barrier to uptake; instead, it's breaking established habits. In order to achieve that, **financial rewards** can be instrumental.

Despite some encouraging signs of post-pandemic recovery, inflation is tangible in the German market and will likely **drive BPC consumers towards private label brands and local**

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companies. Also, rising plastic prices will continue to push innovation and sustainable efforts, albeit out of necessity.

One of the biggest threats in the market is a lack of industry-wide eco standards as well as the resulting **disillusionment on the part of consumers.** Pending EU legislation as well as efforts by brands and manufacturers to **introduce common eco standards** can help to clear up confusion.

Refillables **are one of the biggest opportunities** in sustainable BPC. **Positioning them as a lifestyle choice can boost their appeal;** so can making sure that they're financially viable for consumers, especially those who struggle the most with rising prices. **Sustainable ingredients** present another opportunity, seeing that there is a direct link to purchases of eco-friendly BPC.

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- The five year outlook for sustainability in BPC

Market context

- Slower growth expected after period of post-pandemic recovery
 - Graph 1: key economic data, in real terms, 2019-23
- Rising costs set to benefit private label and localism
 - Graph 2: household and lifestyle issues faced in the last two months, 2022

Mintel predicts

- Legislation is a key sustainability driver
- Sustainability success hinges on affordability
- Onus to drive sustainable change falls on big brands
- Price hikes put the final nail in the plastic coffin
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Opportunities

- Enhance lifestyle appeal of refills
- Use financial incentives
- Appeal to Gen Z and Millennials with reward and collection concepts
- Focus on ingredients to attract sustainability advocates
- Plug gaps in eco-friendly fragrance, hair removal
- Quick download resources

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APPENDIX

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- Abbreviations
- Consumer research methodology
- CHAID Analysis
- CHAID – Tree output
- A note on language

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