



Unpacking Sustainability:

Do Consumers Really Understand
Packaging Claims? Bridging the Gap
Between Understanding and Opportunity

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Your presenters today



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Agenda

**Charting the Rise
of Sustainability
from the
Consumer POV**

**Sustainable
Packaging Claims
and Trends
Across the Store**

**Case Study:
Crack Open
Growth**

Charting the Rise of Sustainability from the Consumer POV





Consumer Life is the most comprehensive and longest-standing consumer trend study in the world

50+ years of tracking consumer activities, desires, and needs

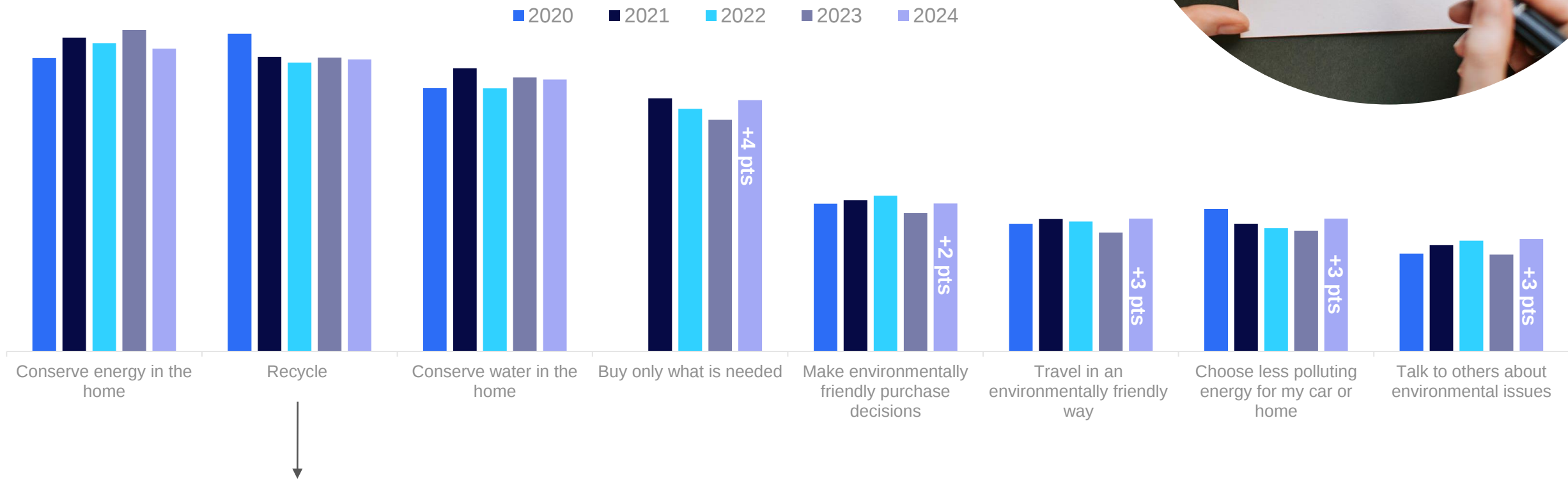
Green Gauge® is a multi-decade syndicated survey that provides marketers and sustainability professionals with a nuanced look at sustainability-related consumer attitudes and behaviors

Actions for the environment experience modest gains YOY

Reducing consumption, eco-friendly buying, sustainable mobility, and talking to others saw bumps since 2023; recycling is popular but changes very little



% of Americans who do the following activities all or most of the time



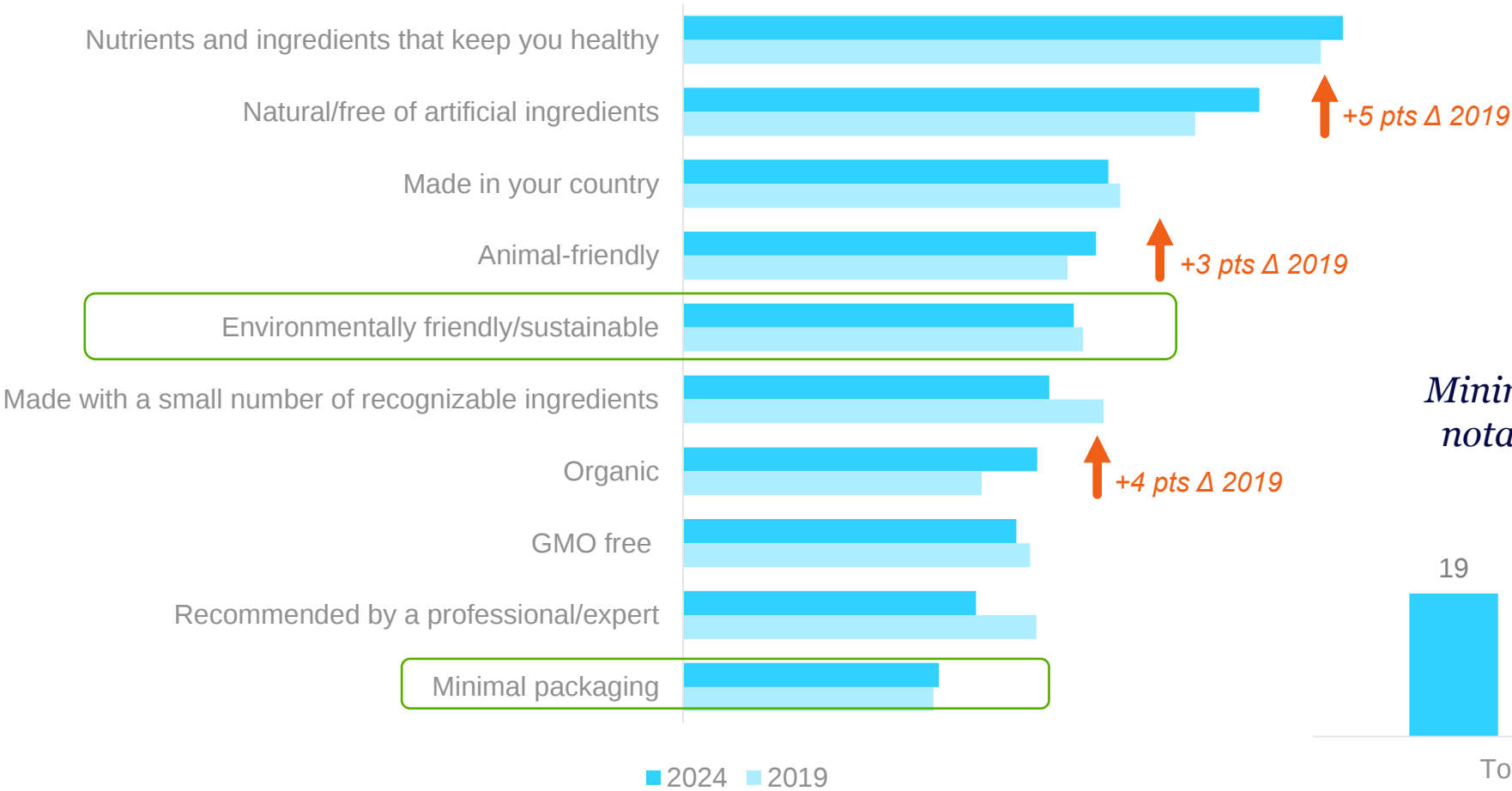
Led by youngest consumer groups:

Frequent recycling rising fastest YOY among Gen Z (+5 pts), students (+10 pts), couples with young children (+5 pts), and renters (+5 pts)

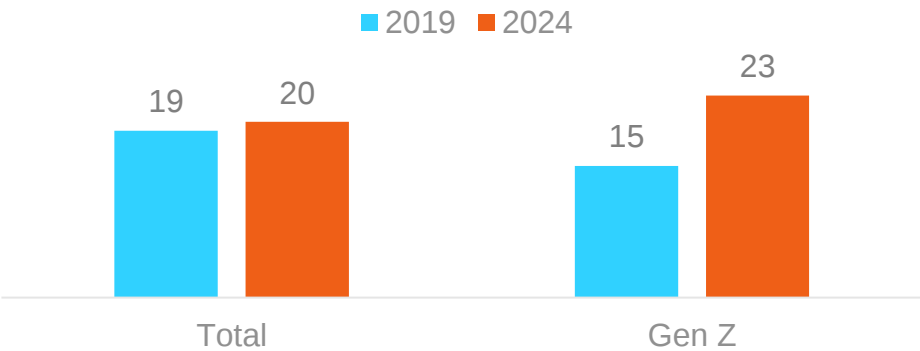
“In me, on me” categories remain a strong opportunity

FMCG is well positioned to capitalize on sustainability, especially when combined with other elements like wellness, organic, and animal-friendly

Shopping influencers for products consumed or put on body (%)



Minimal packaging is increasingly a notable purchase driver for Gen Z:

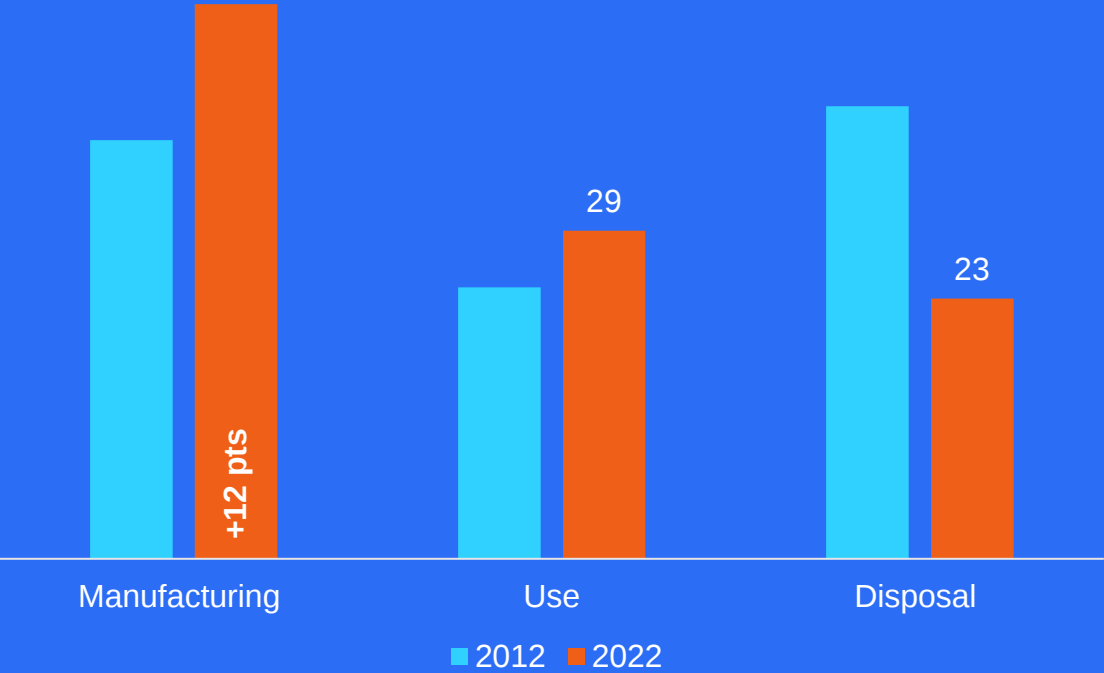


Inflation drives circular economy growth

This model works best when products are designed and manufactured with circularity in mind

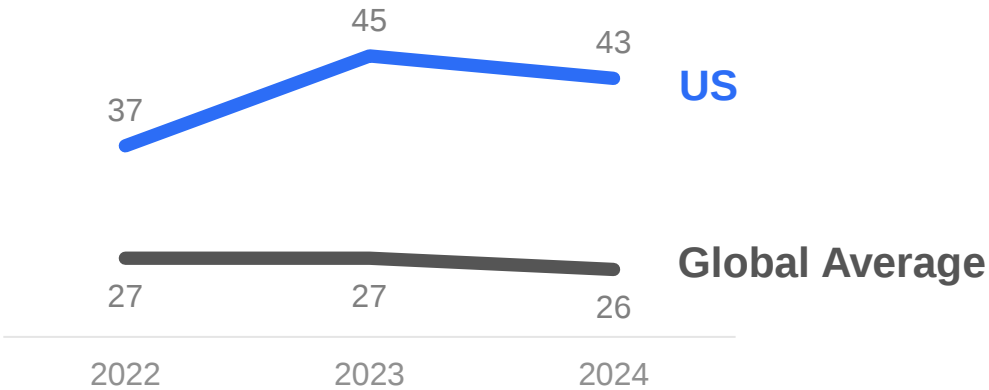
Rising sentiment that products should be sustainable from the start of the lifecycle

Most important product stage for environmental protection (%)



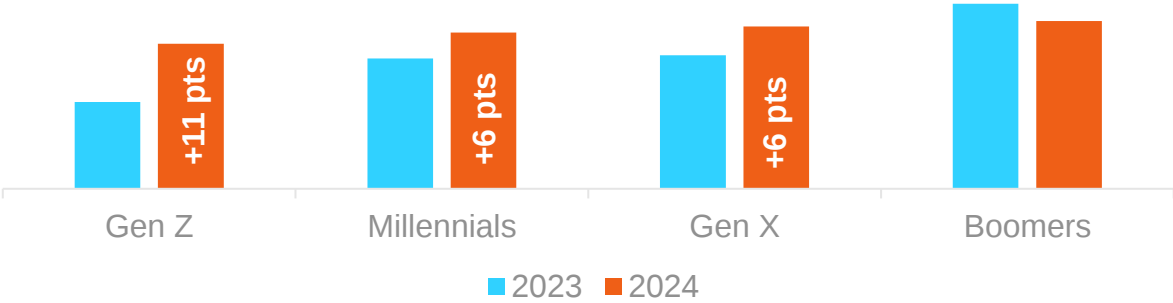
Americans increasingly see value in circular

Bought something second-hand (% P12M)



Rare area where there is generational alignment

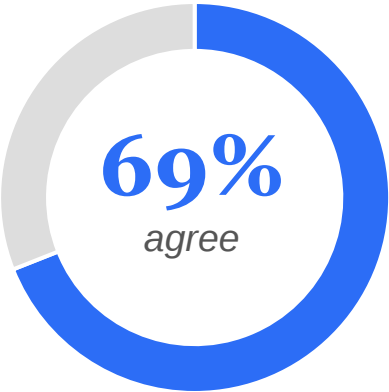
Buy only what you need to reduce wasteful consumption (% top 2)



Labeling remains critical—and credible

High trust across categories

I believe the environmental claims on labels and in advertising



Gen Z	71%
Millennials	75%
Gen X	66%
Boomers	65%



Appliances



Personal electronics



Packaged food



Home care/cleaning



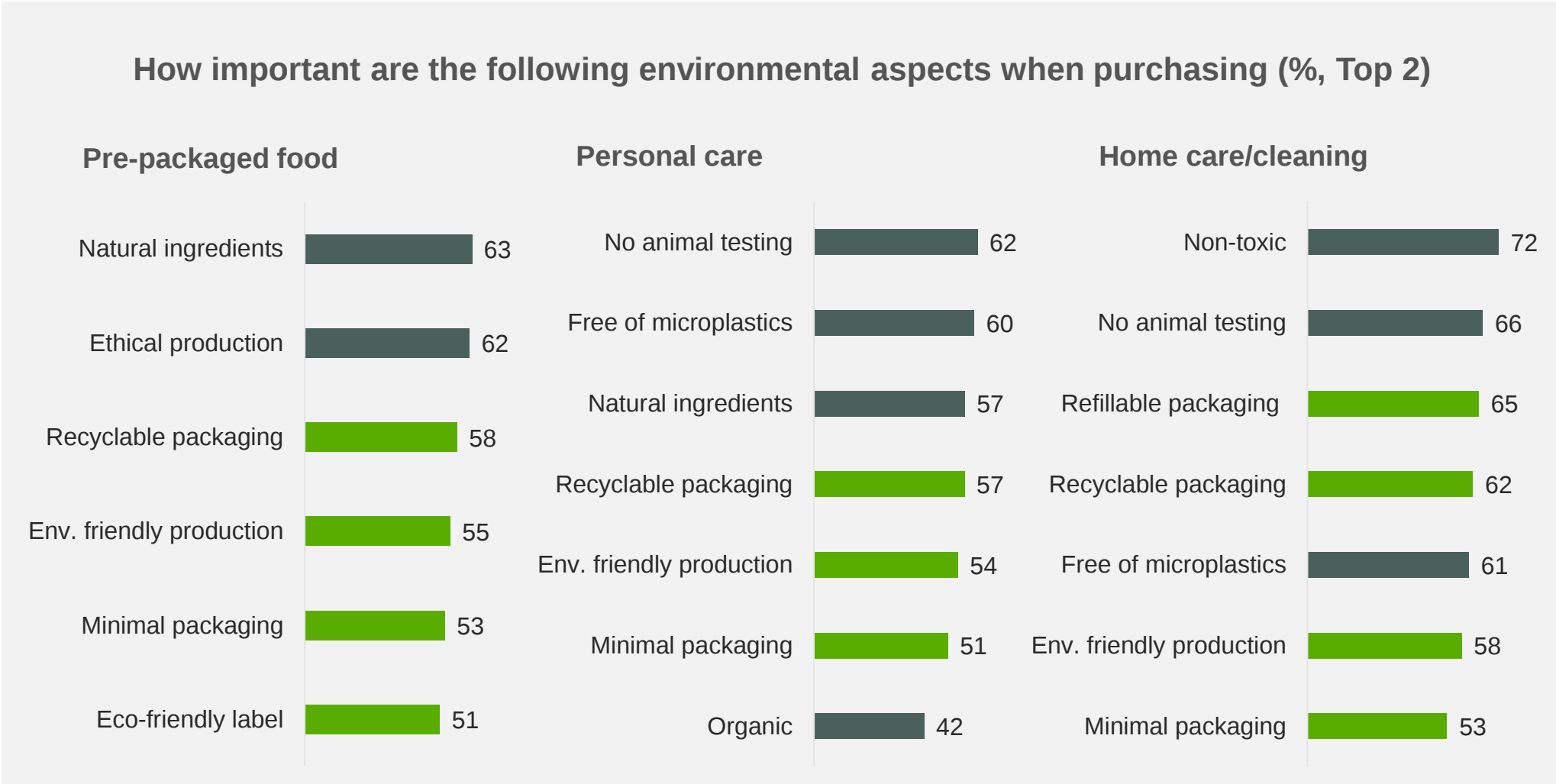
Personal care

Top 5 sources of trustworthy information for environmental impact by product sector

	Appliances	Personal electronics	Packaged food	Home care/cleaning	Personal care
#1	Online reviews	Online reviews	Product labels	Product labels	Product labels
2	Product labels	Product labels	Online reviews	Online reviews	Online reviews
3	Family, friends	Company websites	Family, friends	Family, friends	Family, friends
4	Company websites	Family, friends	Company websites	Company websites	Company websites
5	News	News	News	Government	Social media

Understand the sustainability purchase triggers for your category

In CPG, packaging is often on par with ingredients; microplastics are another watchout



AORA Mexico is certified “plastic negative” thanks to tin, aluminum, & wood packaging; it’s 100% plastic-free, recycle-ready, and made to be reused & repurposed

<https://www.cosmeticsdesign.com/Article/2025/02/05/aora-mexico-partners-with-repurpose-global-to-tackle-beauty-industrys-plastic-waste-problem/>

Green Gauge® segmentation

A nuanced view of sustainability mindsets and motivations

- ✓ Tool with a 30+ year history of identifying themes and distinctions across different groups
- ✓ Used to target large cohorts based on a nuanced view of their sustainability perspective
- ✓ Determines which groups are most and least receptive to various sustainability products and messaging
- ✓ Deep dives into each segment let you tailor your strategies to their unique sensibilities



Green in Deed



Glamour Green



Carbon Cultured



Green in Need



Jaded

A long-term shift in sustainability desires and motivations

With more short-term stability in segment distribution



Green in Deed

The most genuinely active in environmental thought and action



Glamour Green

Considers green behavior as a badge of honor/status symbol – eager to showcase eco-friendly behaviors and purchases



Carbon Cultured

Pro-environmental attitudes, but focus mostly on the “easy” behaviors



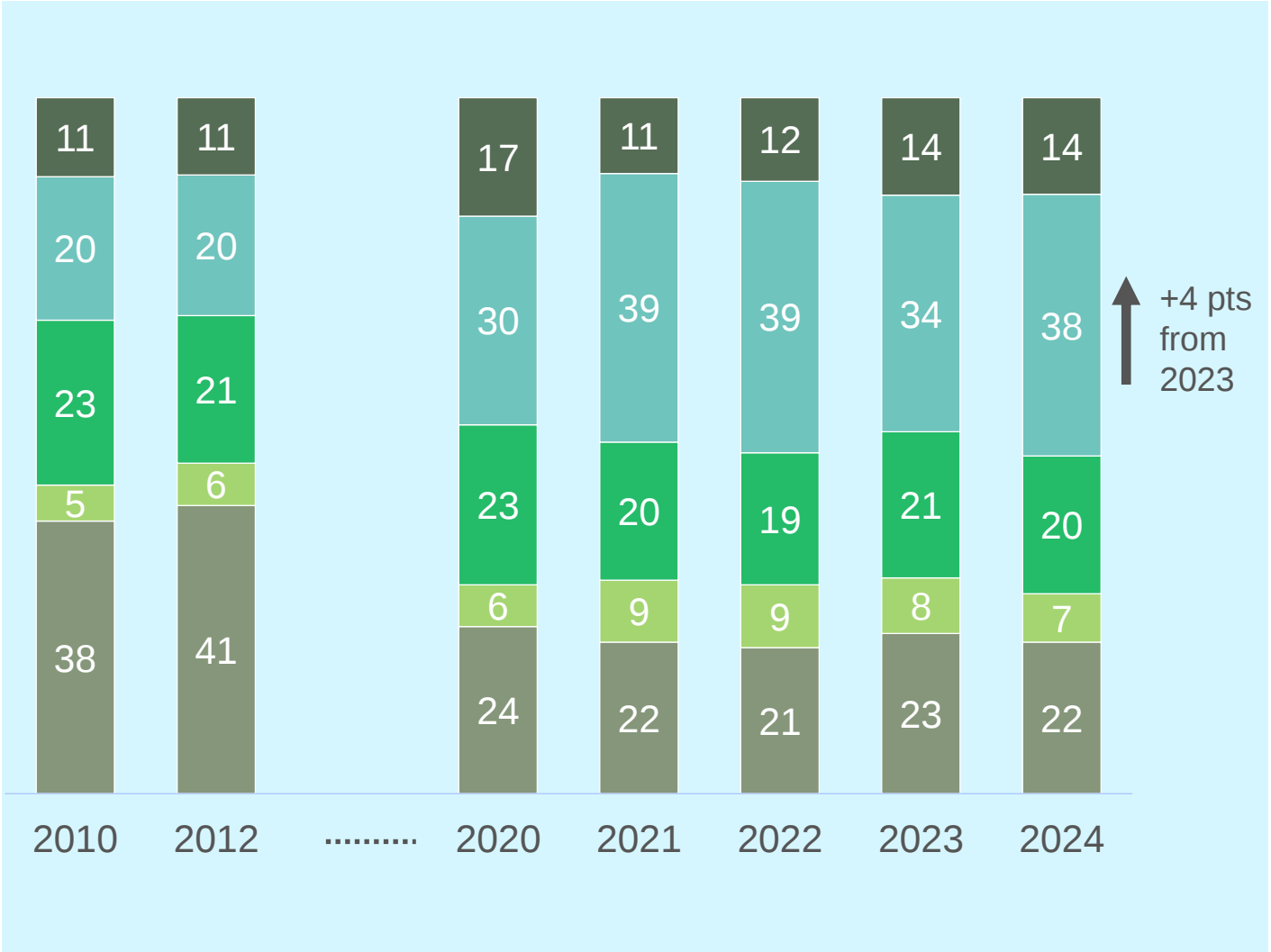
Green in Need

Holds pro-environmental attitudes, but lack the tools to translate them to behaviors



Jaded

Skeptical and cynical, but still engages in low-effort environmental behaviors



Government accountability in sustainability is rising as an expectation

Yet ratings on government efforts leave room for improvement

45% agree

+9 pts from 2023

The **government should be addressing our environmental problems**, and not individuals like me
Led by Gen Z and Millennials

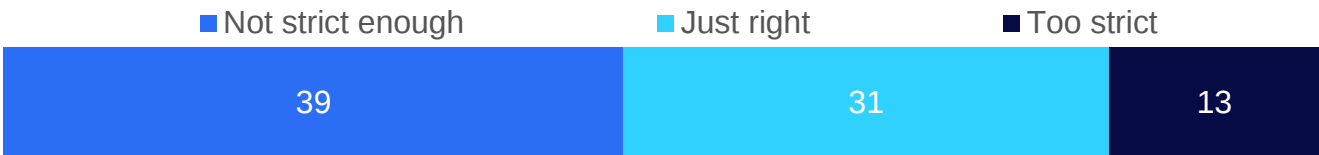
61% agree

+3 pts from 2008

I would like to see **major change in environmental protection** within 4 years after the 2024 Presidential election

4 in 10 Americans think environmental laws and regulations are not strict enough

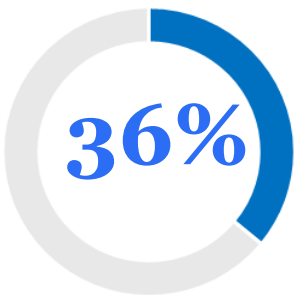
Perception of environmental protection laws
(% selecting)



Green inDeed (+17 pts from total)
Carbon Cultured (+7 pts)
Boomers (+3 pts)

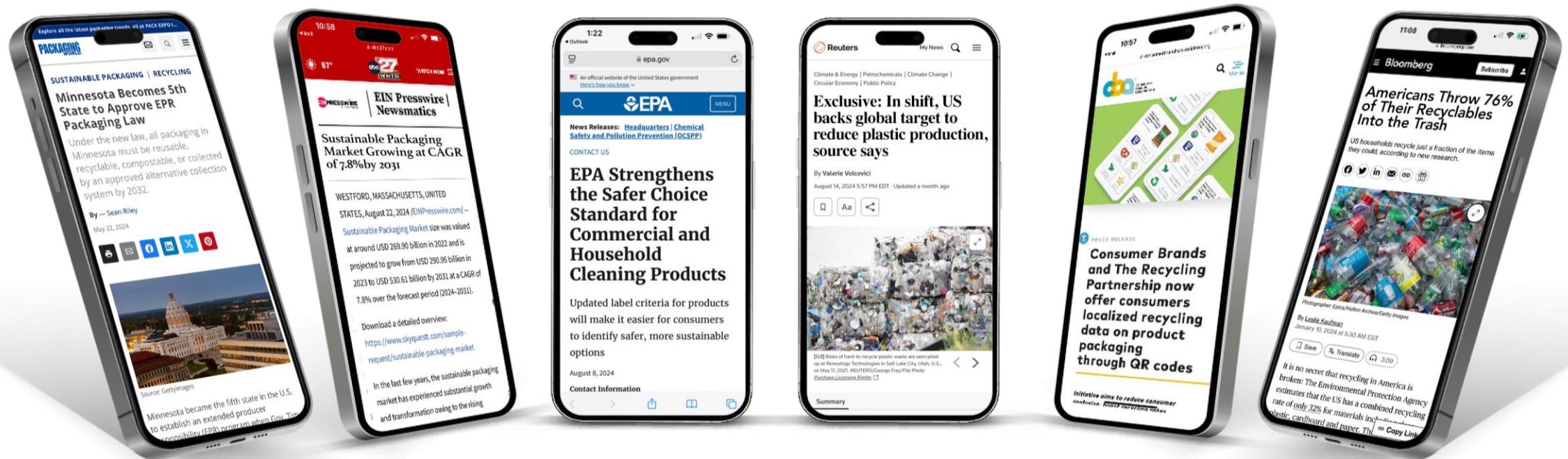
Glamour Green (+8 pts)
Millennials (+7 pts)

Jaded (+4 pts)



of Americans believe that the government is doing a **good or excellent job at reversing global warming/ climate change**

Government initiatives meet growing consumer sustainability concerns



12 States have introduced legislation on EPR for packaging in 2025

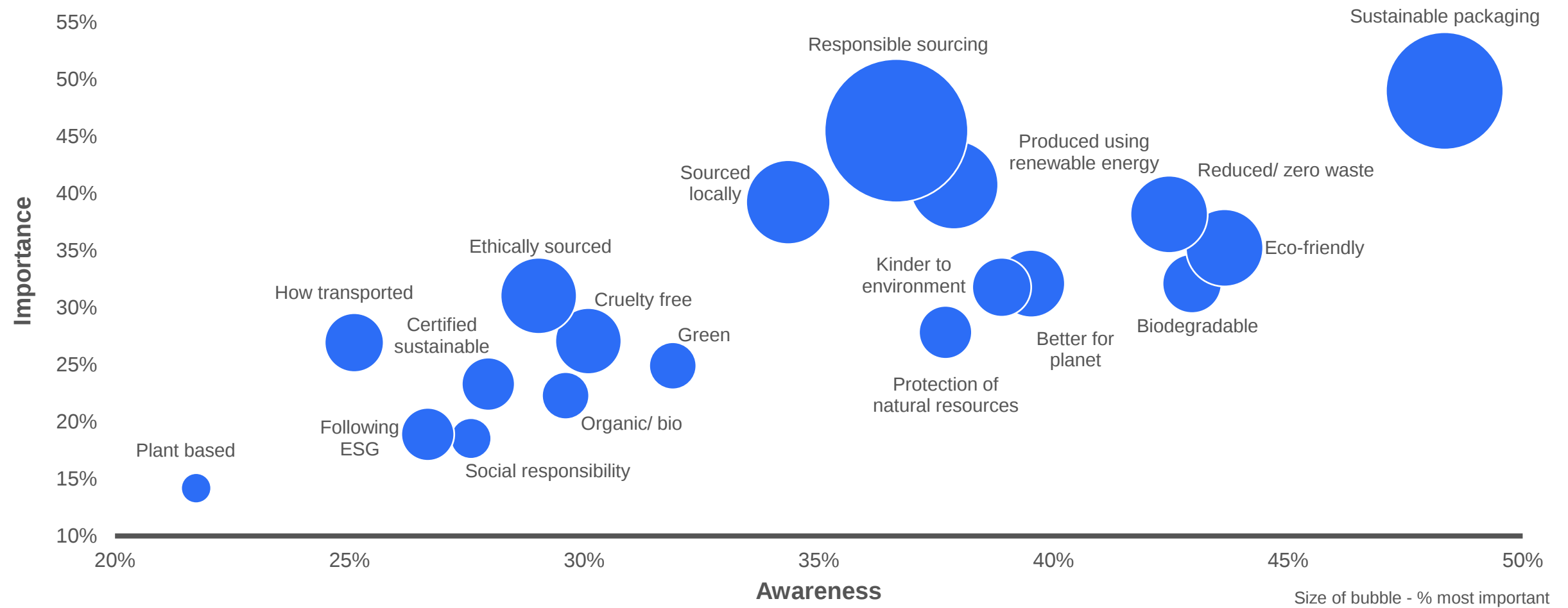
5 EPR for packaging bills have passed in the U.S.

SPC <https://epr.sustainablepackaging.org/>

Sustainable Packaging Claims and Trends Across the Store

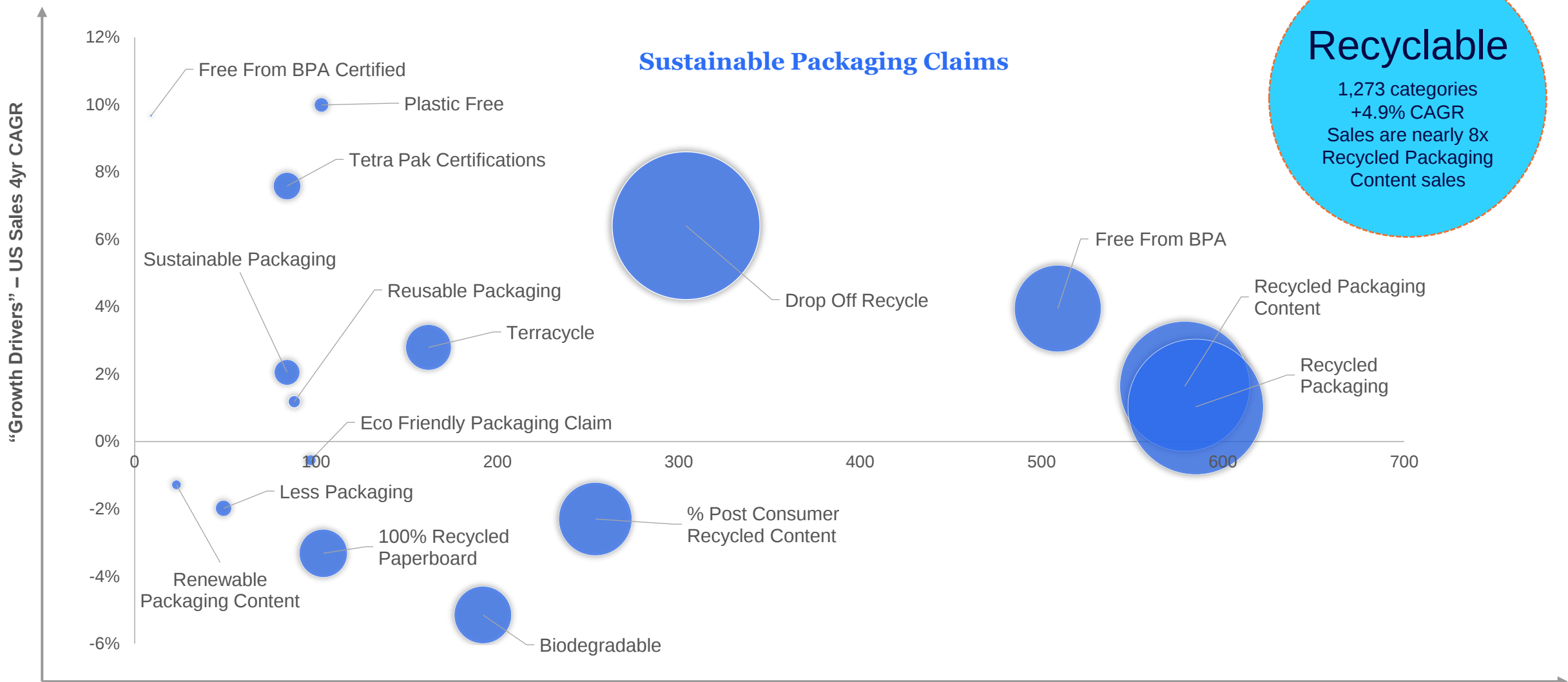
What makes a brand sustainable?

Claims that make a brand sustainable



Source: NielsenIQ 2023 Sustainability Report - Q: Coming back to grocery brands, which of these claims do you believe make a brand “sustainable”?

Packaging claims are growing across the store



Bubble size denotes total sales in L52 week All attributes represent claims STATED on package unless indicated by an * symbol

Source: NIQ, Retail Measurement Services, NIQ Product Insight—powered by Label Insight; Total US xAOC; Total Store (excludes Gen Merch); # of Categories selling, 4-yr CAGR (\$); 52 weeks ending February 22, 2025

Recycling Claims are Leading the Way

Sustainable packaging presents opportunities throughout the store

		\$ % Chg YA	4-yr CAGR (\$)	\$ Volume
	Total Store ²	+2.2%	+3.9%	
	All Sustainable Packaging	+0.4%	+3.1%	\$93.1B
Proven trends	Drop off recycle	+1.5%	+6.4%	\$55.0B
	Recycled packaging content	+0.4%	+1.6%	\$42.3B
	Recyclable checked locally	+1.5%	+7.3%	\$19.9B
Growing trends	Curbside recycle	+7.3%	+5.0%	\$13.6B
	Terracycle	-5.8%	+2.8%	\$5.2B
	Tetra Pak certifications	+9.2%	+7.6%	\$1.9B
Developing trends	Sustainable packaging	+5.8%	+2.1%	\$1.6B
	Plastic free	-8.9%	+10.0%	\$0.5B
	Free from BPA certified	+10.3%	+9.7%	\$13.6MM

'Stated' claims on package. Does not represent all available sustainable packaging attributes.

Source: NielsenIQ Retail Measurement Services, NielsenIQ Product Insight, powered by Label Insight, Total US xAOC; Total Store – PI Sustainable Packaging stated attributes; \$ % change vs year ago, 4-year CAGR; Latest 52 weeks ending February 22, 2025

1 - Consumer Brands Association, 20

2 - Total Store = Food & Beverage, Alcohol, Baby, Healthy & Beauty Care, Household Care, Pet Care

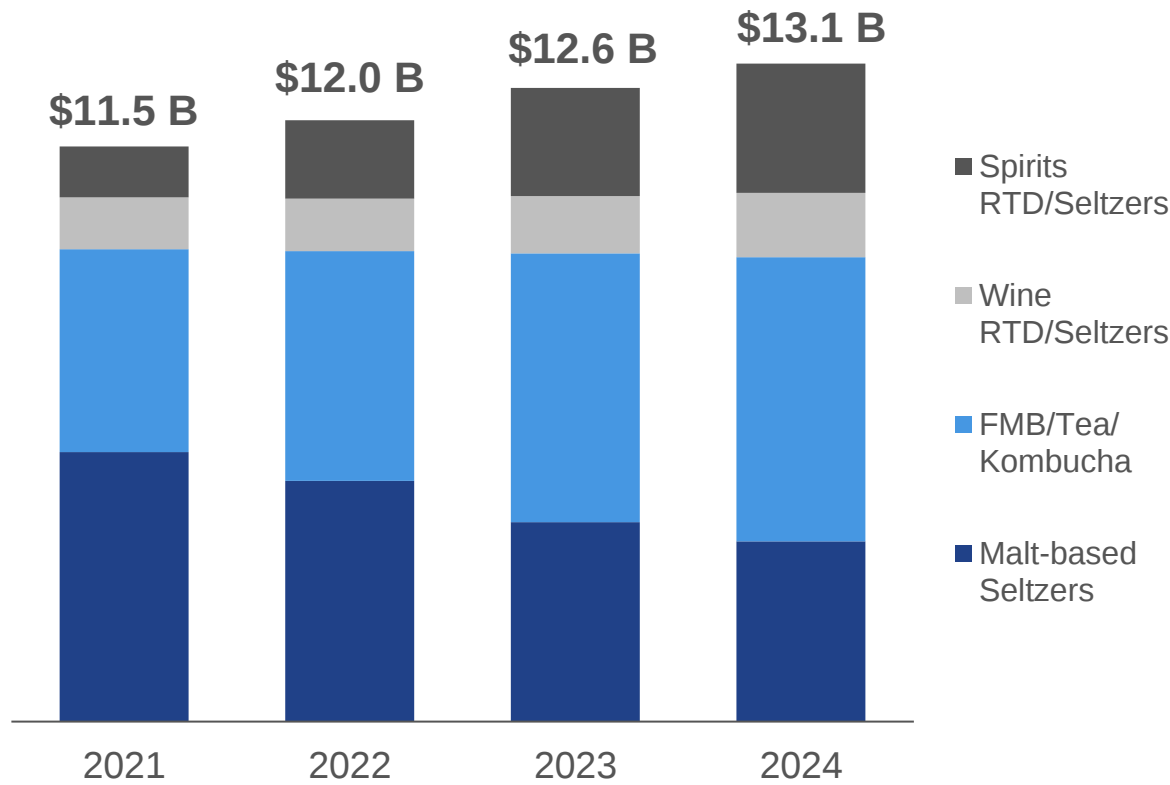
Claims Case Study: Crack Open Growth

NIQ

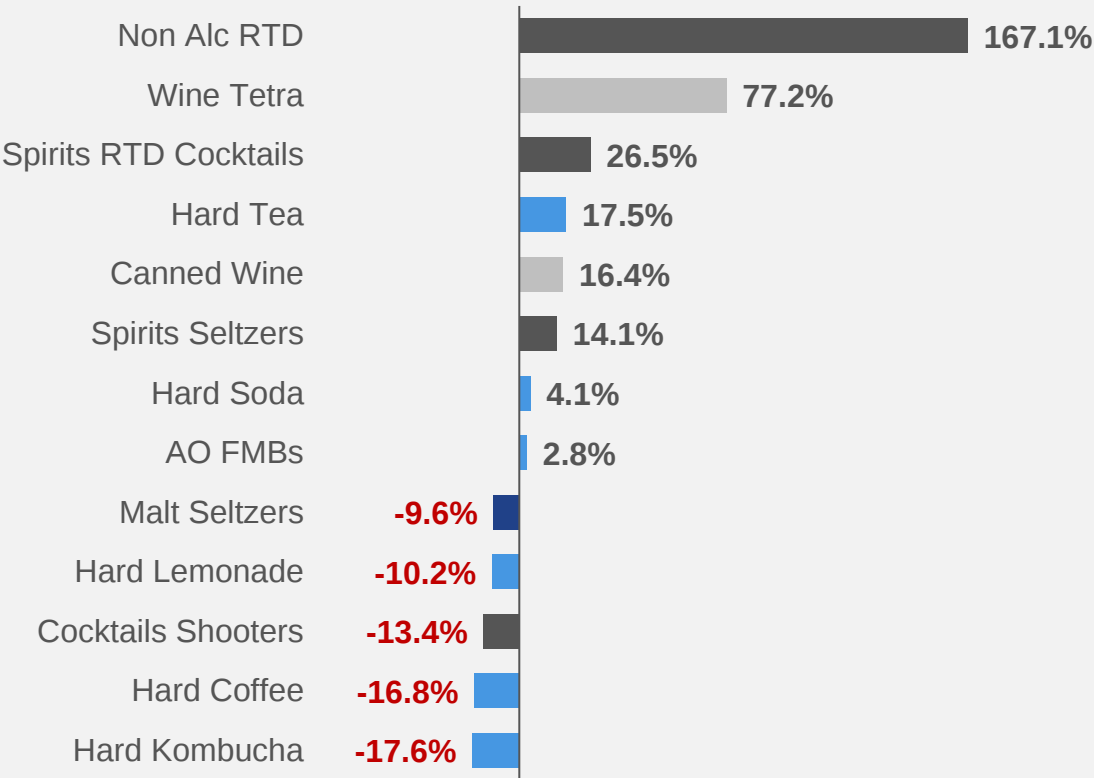


Spirits-based RTDs and FMB segments driving growth of RTDs

Total RTD – \$ by Alcohol Base
NIQ Off Premise Channels



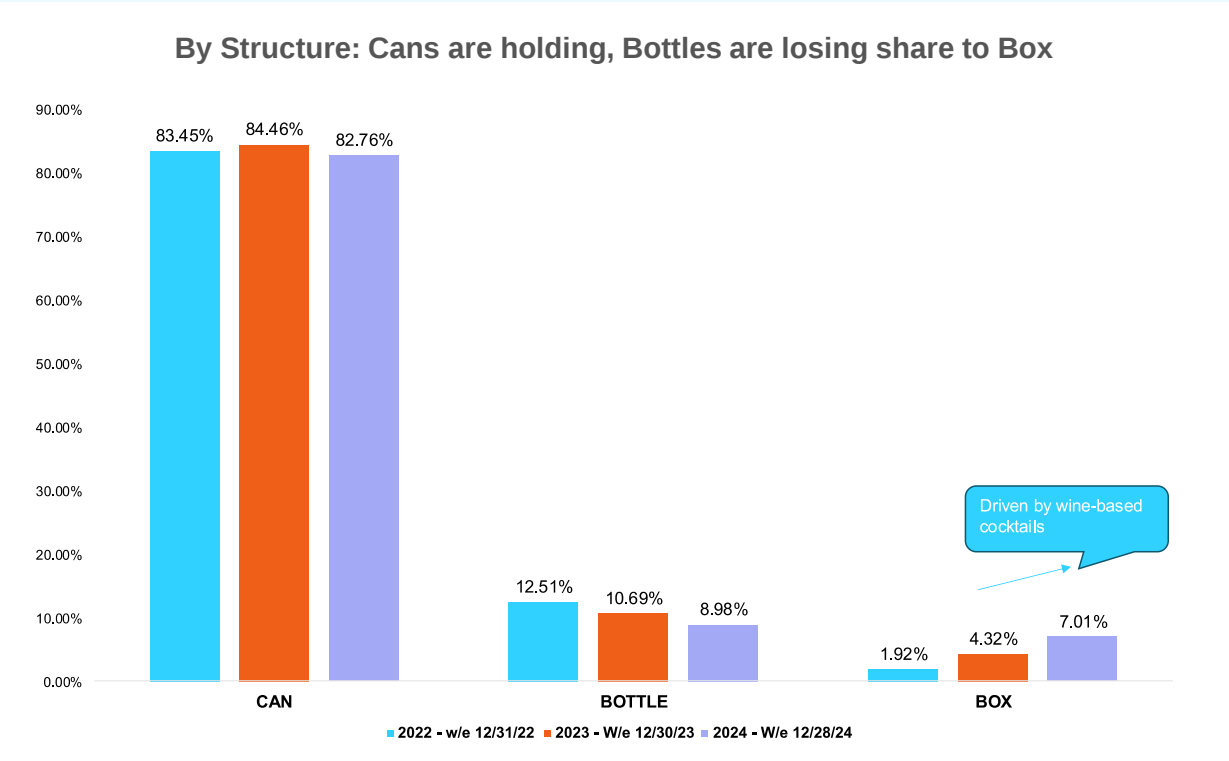
Total RTD - \$ growth by Segment
NIQ Off Premise Channels



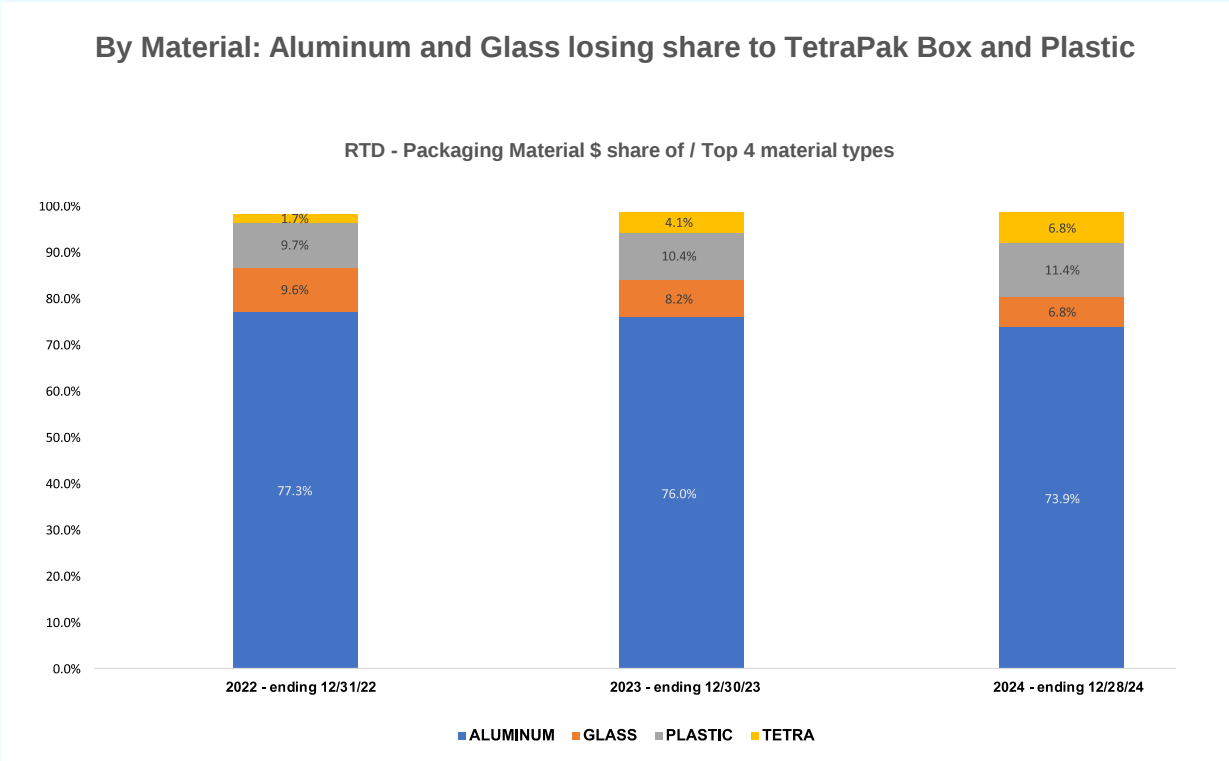
Source: NIQ Discover Integrated Database; Scan Off Premise Channels (xAOC+Conv+Liquor Open State); L52 weeks ending 12/28/2024

Taking a deeper dive on packaging shape and material

Cans are holding but Bottles losing share to Box, while Aluminum and Glass are losing share to TetraPak Box and Plastic



Source: NielsenIQ Retail Measurement | US ALC - Integrated | Total US xAOC + Liquor Open State + Conv | ALC PACK: Single



Source: NielsenIQ Retail Measurement | US ALC - Integrated | Entire Dataset | Total US xAOC + Liquor Open State + Conv | ALC PACK: Single

Room for Standardization

21 out of 55 Sustainability Claims in the Ready to Drink Category reference some variation of the word ‘Recycle’

1 PERCENT FOR THE PLANET MEMBER
100 PERCENT RECYCLABLE
ALL ALUMINUM CAN PLEASE RECYCLE
ALL ALUMINUM PLEASE RECYCLE
ALUMINUM IS INFINITELY RECYCLABLE
ALWAYS RECYCLE
BPA FREE
BPA FREE CANS
BPA FREE LINING
CANS ARE 100 PERCENT RECYCLABLE
CANS INFINITELY RECYCLABLE
CARTON IS RECYCLABLE BOARD
DONT BE TRASHY
EARTH FRIENDLY PACKAGE
ECO FAIR
ECO FRIENDLY
FSC MIX
FSC MIX BOARD
GLASS FREE
INDEFINITELY RECYCLABLE
MADE WITH 15 PERCENT RECYCLED PLASTIC
MAHALO FOR RECYCLING
METAL RECYCLES FOREVER
NO BISPHENOL A
NON INTENT BPA FREE
NOT APPLICABLE
PACK IT IN PACK IT OUT
PLEASE RECYCLE

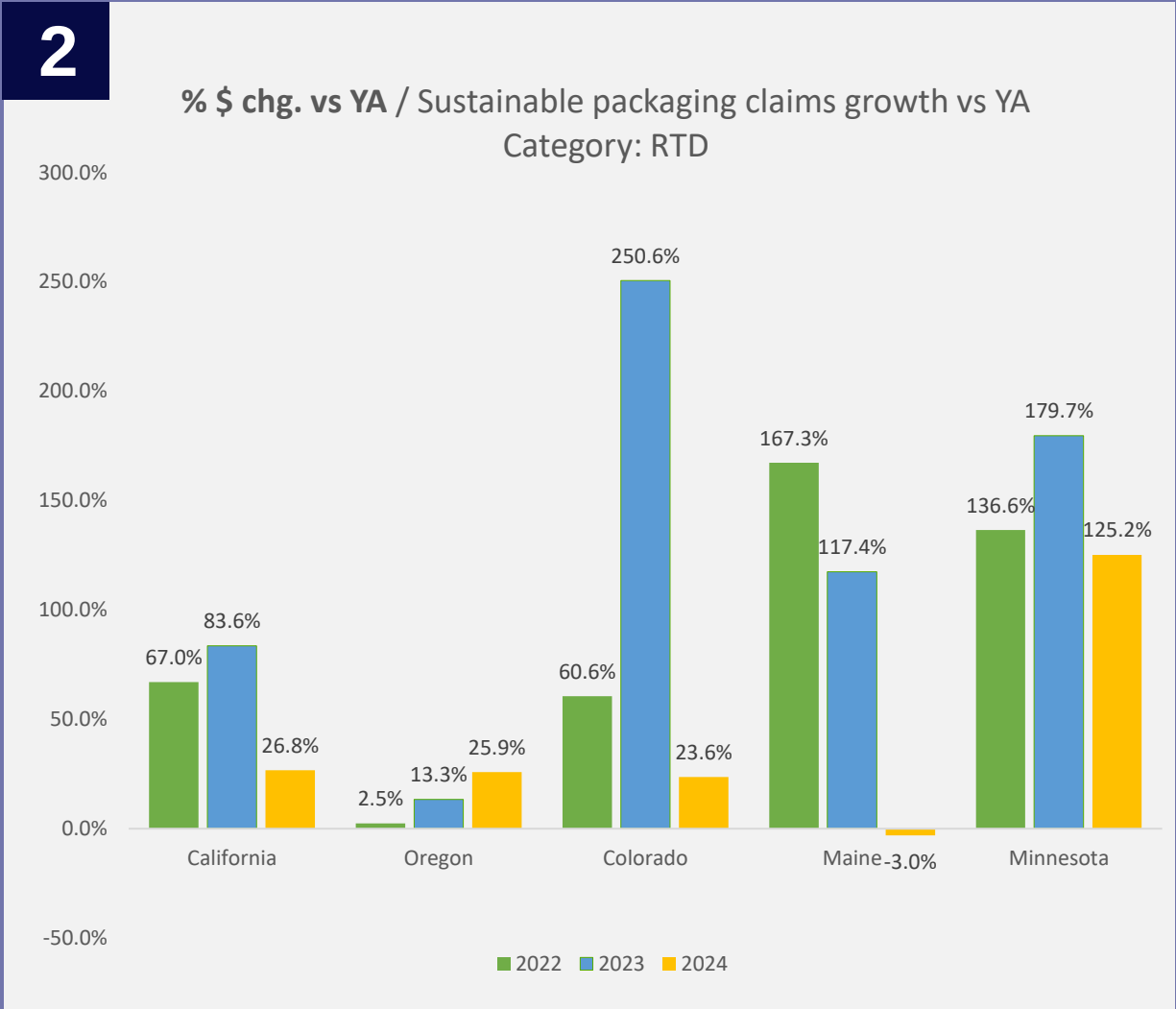
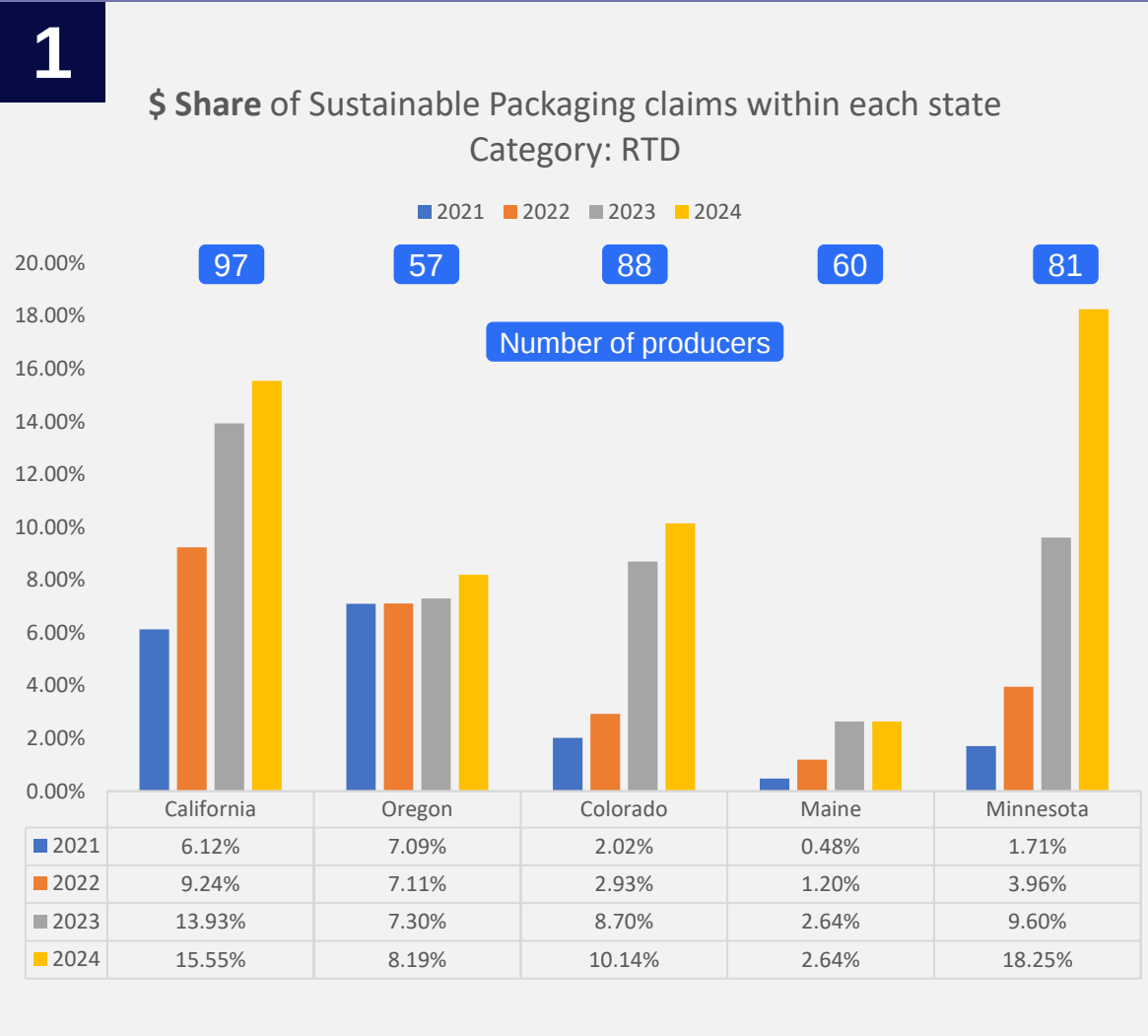
PLEASE RECYCLE AFTER YOU ENJOY
PLEASE RECYCLE IF PERMITTED IN YOUR AREA
PLEASE RECYCLE ME
PLEASE RECYCLE SLEEVE AND CAN SEPARATELY
PLEASE RECYCLE THIS BOTTLE
PLEASE RECYCLE THIS CAN
PLEASE REUSE OR RECYCLE
PROTECT OUR PLANET
PROTECT THE ENVIRONMENT
RECYCLABLE
RECYCLABLE ALUMINUM
RECYCLE
RECYCLE DAMMIT
RECYCLE IT
RECYCLE ME
RECYCLE RESPONSIBLY
RECYCLE THE CAN
RECYCLE THIS CAN
RECYCLING IS COOL
REMOVE SLEEVE AND RECYCLE GLASS
SAVE THE ENVIRONMENT
SUSTAINABLE FORESTRY INITIATIVE CERTIFIED
SOURCING
SUSTAINABLY PACKAGED
TERRACYCLE
THANK YOU FOR RECYCLING
THE ORIGINAL ENVIRONMENTALLY FRNDL BOX
WORLDS FIRST ECO FRIENDLY COCKTAIL PACKAGING

PACKAGE ENVIRONMENTAL CLAIM	ALC MANUFACTURER	ALC BRAND FAMILY	ALC PACK	ITEM	UPC
RECYCLE DAMMIT	ALL OTHER COMPANIES	WILLIE'S SUPERBREW	MULTI PACK	WILLIE'S SUPERBREW BCH SLZ AST BEACH ADE VA...	086000762714
RECYCLE DAMMIT	ANHEUSER-BUSCH INC.	KARBACH	SINGLE	KARBACH MARGARITA CAN ALUMINUM 1PK 16OZ	081002820197
RECYCLE DAMMIT	ANHEUSER-BUSCH INC.	KARBACH	SINGLE	KARBACH PALOMA CAN ALUMINUM 1PK 16OZ	081002820196



Source: NielsenIQ Retail Measurement | US ALC - Integrated | Entire Dataset | Total US xAOC + Liquor Open State + Conv | ALC PACK: Single

Sales by Sustainable Packaging Claims by US State



Takeaways

Consumers trust environmental claims on labels and ads, but terms like recycling vary widely which leads to confusion

As U.S. states enact EPR legislation, standardized language and regulation will accelerate compliance and action

Our packaging data and consumer insights goes deep and can help support tracking and measuring your sustainability goals



Thank you

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