

Environment Research 2015

Summary Report

Millward Brown for Tetra Pak

July 2015



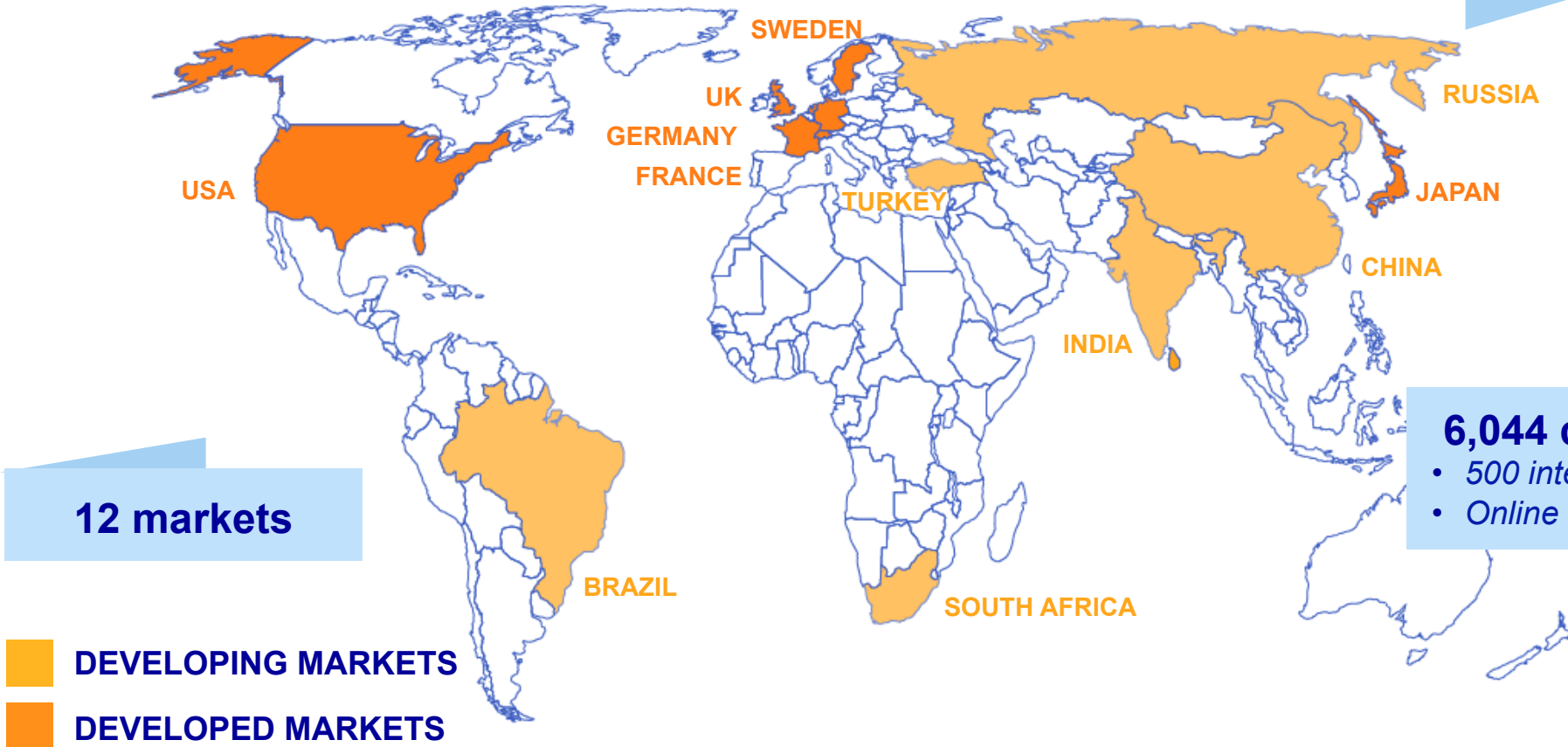


Country coverage

Consumers and Industry view

241 industry influencers

- 20 interviews / country
- Food Manufacturers & Retailers
- NGO's / Research / Industry Associations
- Online (qualitative)



6,044 consumers

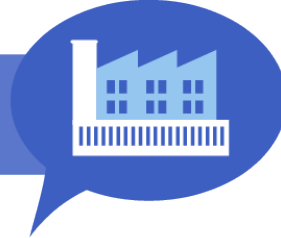
- 500 interviews / country
- Online (quantitative)





Key findings 2015

INDUSTRY



RECYCLING AND RENEWABILITY

are some of the key areas where industry expects innovation from the packaging sector

Environmental performance of equipment is also increasingly regarded as fundamental

BRAND EQUITY

is the most important driver for environmental initiatives

70% of influencers declare environment has an impact on brand equity

BARRIERS

related to technology, quality and availability of sustainable materials have all declined vs. 2013

ON-PACK

is the #2 preferred channel for environmental communication, after corporate websites

CONSUMERS



ENVIRONMENTAL ACTIONS

70% have purchased an environmental product, even if it costs more

66% have avoided a particular product or brand for environmental reasons

39% of consumers always / often look for environmental information on beverage packaging

HAVING KIDS

highly influences consumers in looking for environmental products

29% of consumers mention lack of information as a barrier to buying environmental products

ON-PACK AND SOCIAL NETWORKS

are among the preferred channels to read and follow environmental information



Influencers mention recycling and renewability among expected innovations



Q Which innovation do you expect the beverage carton industry should to focus on to improve the environmental profile of carton package?

= 2013



RECYCLING

- Value of materials continues growing
- Increasingly asked by consumers, retailers and legislative requirements

RENEWABILITY

- Complementary to recyclability
- Growing consumers awareness
- Need to find proper communication tools

↑ vs 2013



NEW
vs 2013

SUSTAINABLE PRODUCT CHAIN

- Use of renewable materials
- Equipment efficiency (energy, water, waste)

FOOD WASTE

- Shapes that allow package to get completely emptied
- Minimization of losses during distribution

NEW
vs 2013

CARBON / WATER FOOTPRINT

- Hard to be understood by consumers
- Water consumption highly linked to social issues
- High fit into circular economy initiatives

PACKAGING WEIGHT

- Further reduction of packaging weight when possible

Environmental certifications

• Industry influencers are concerned about additional costs and processes related to certifications

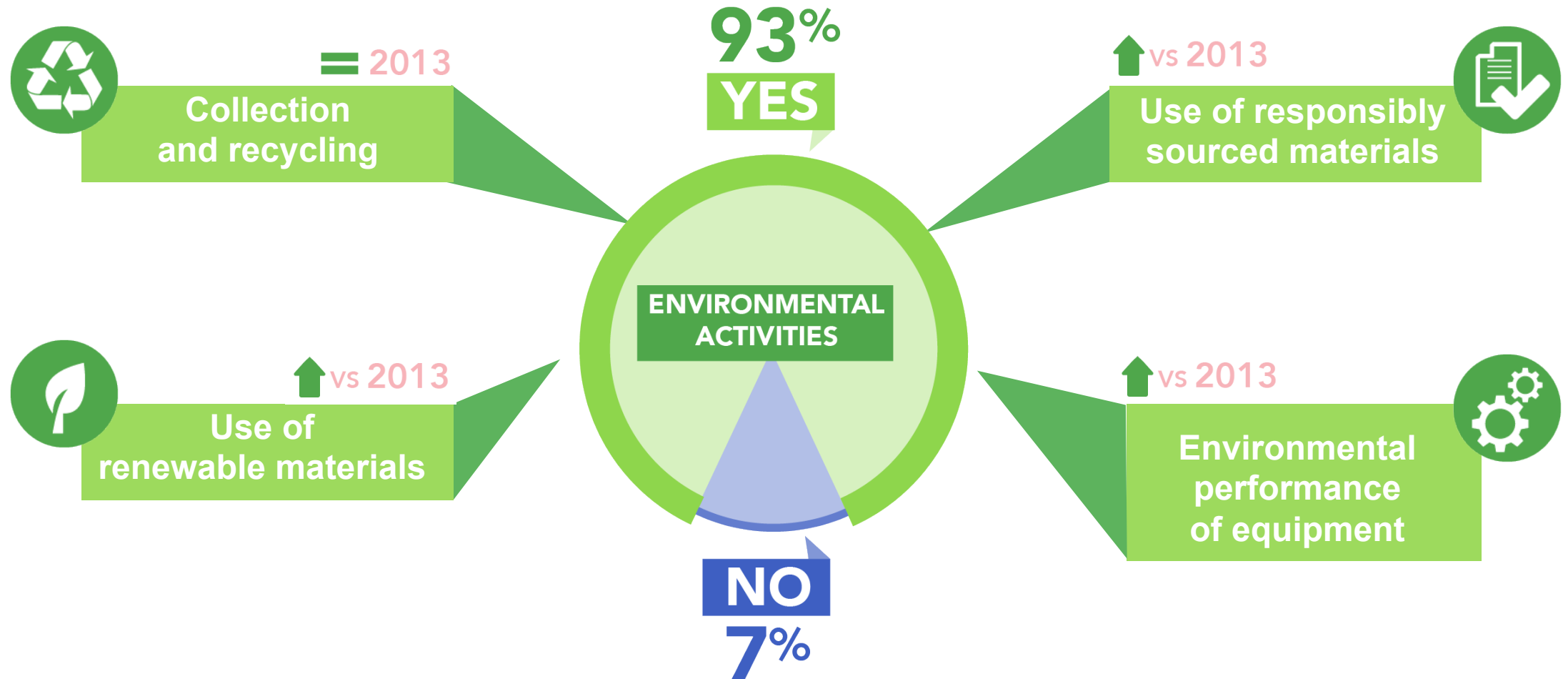
• But most of them say environmental certifications and labels are a powerful communication tool to consumers and make their brand more meaningful



Most companies have environmental initiatives in place



Q Does your company have any environmental initiatives and/or environmental products or services?
Can you please specify which environmental factors / initiatives are you thinking about?

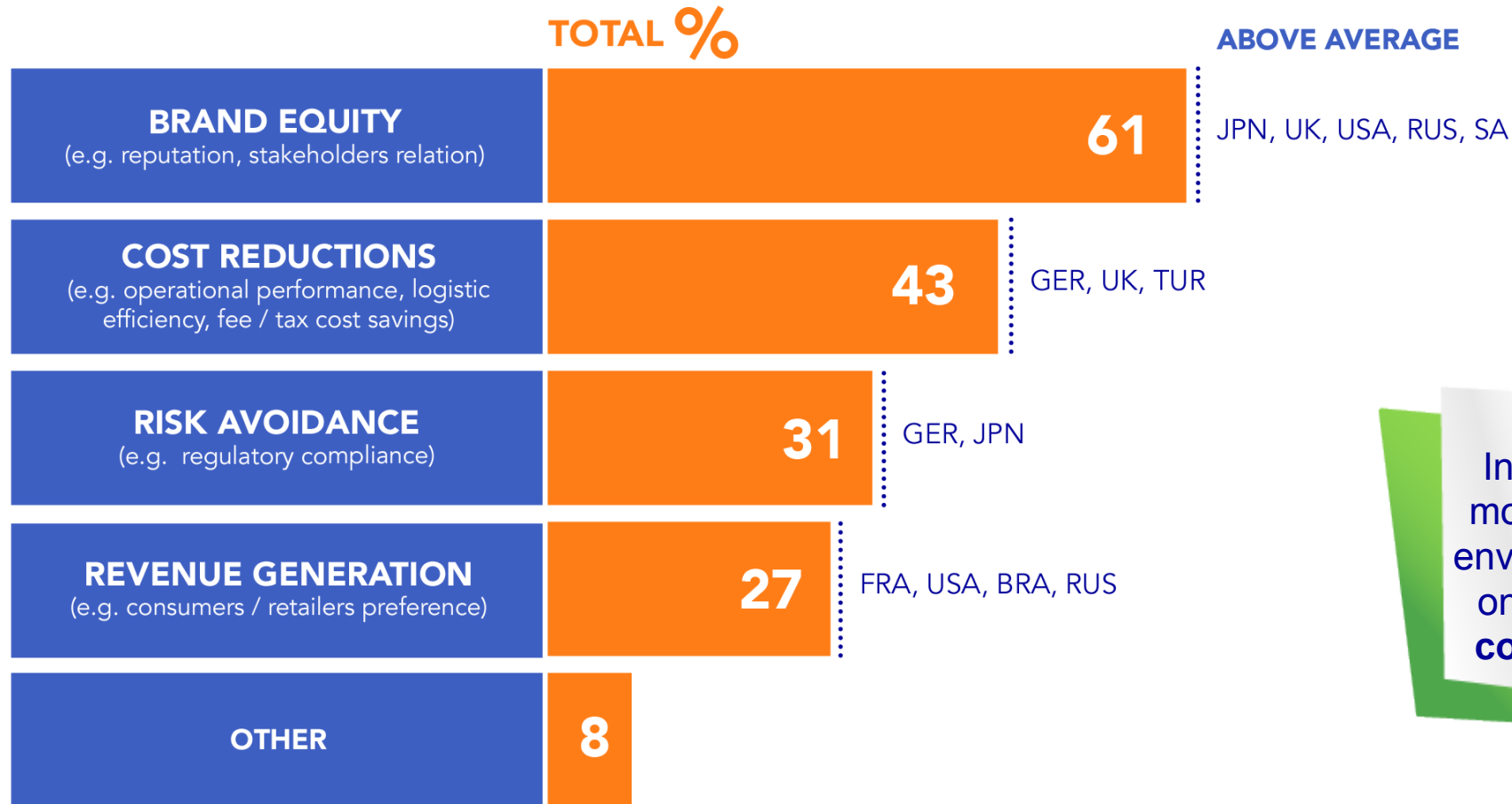




Brand equity is the most important driver for environmental initiatives



Q In your opinion, which are the most important drivers of environmental initiatives in your company?
Choose the most appropriate answers from the list below or add anything more in the space "other"



Base: Total sample (241)

Industry increasingly monitors the impact of environmental initiatives on **brand image and company reputation**

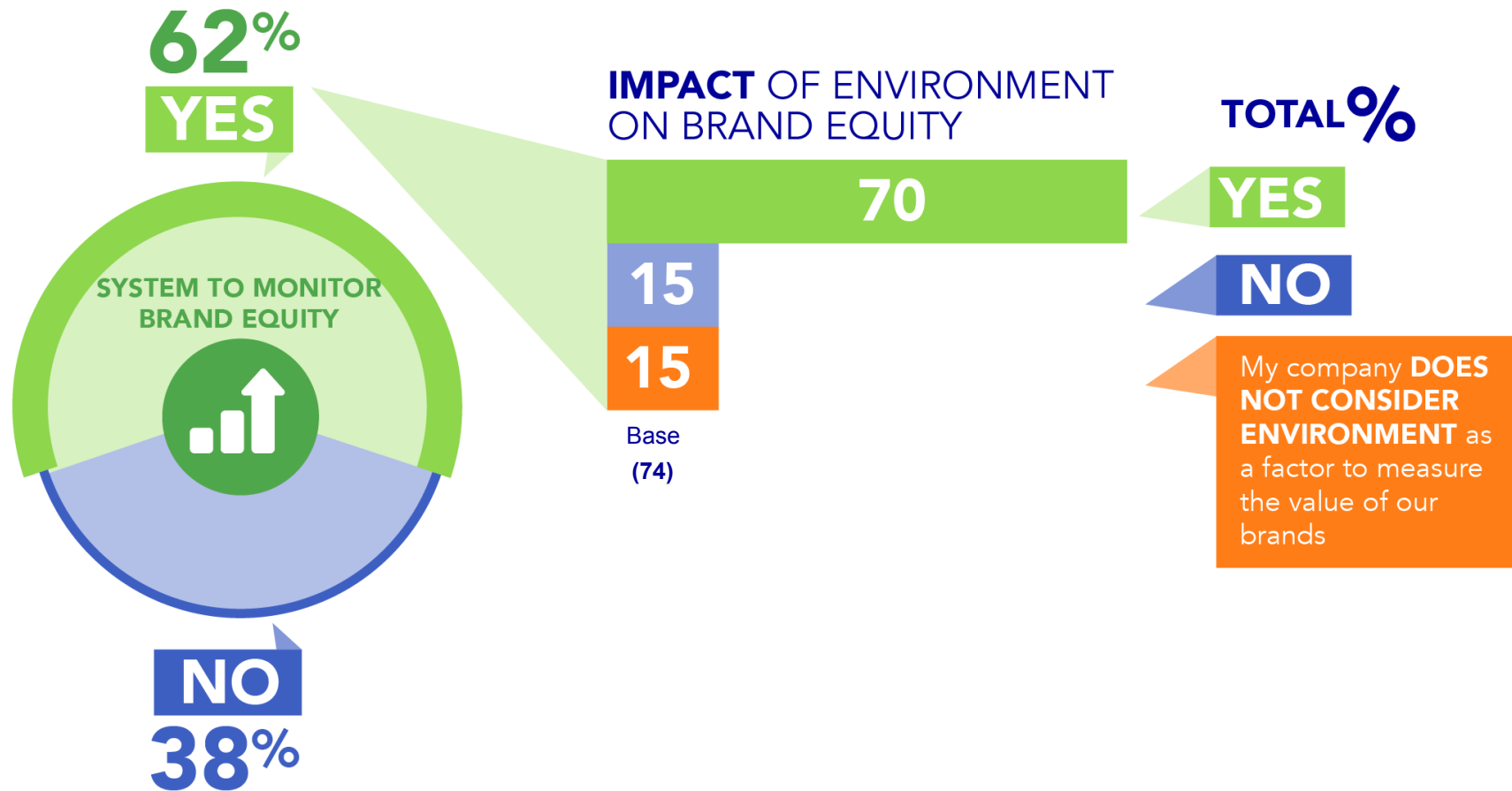


62% of manufacturers monitor brand equity

And most of them say environment has an impact on it



Q Does your company have a system to measure and monitor the value of its brands among the end consumers?

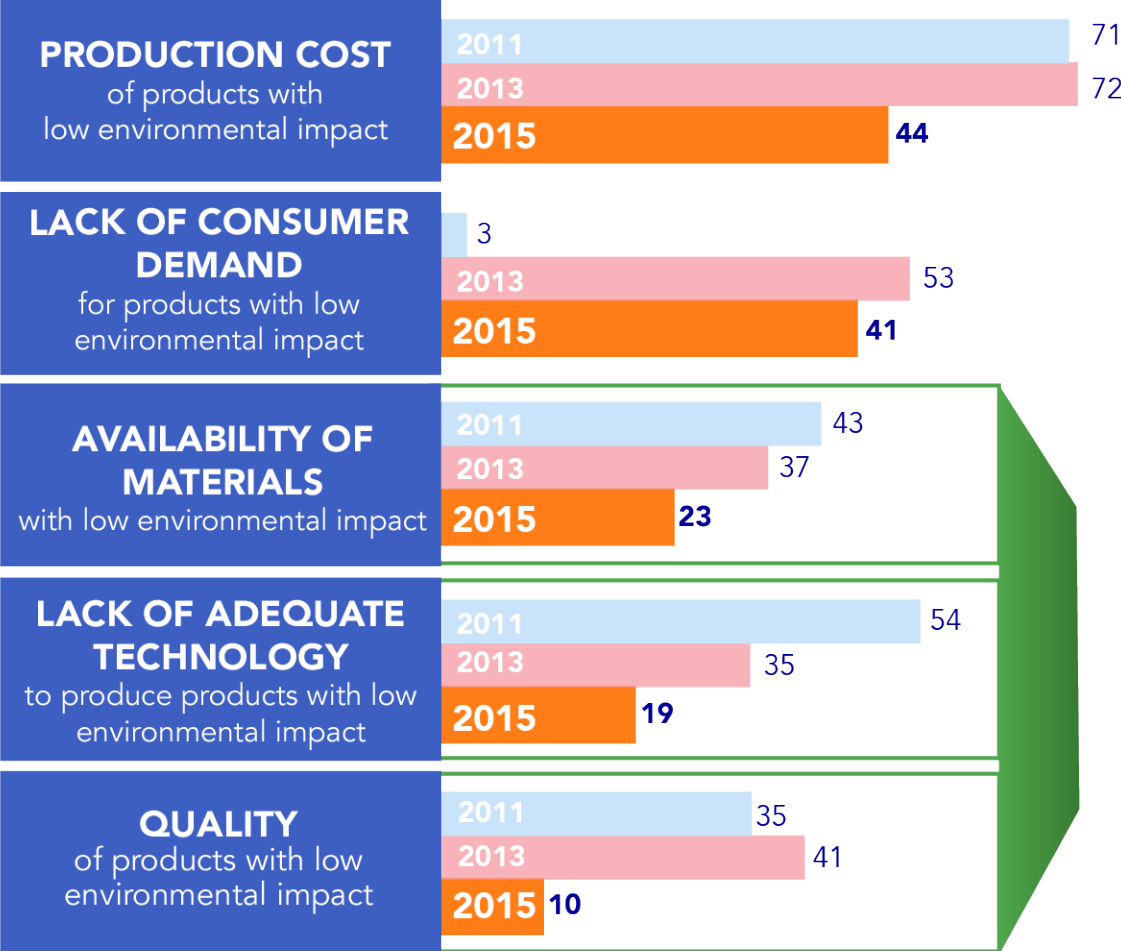




Impact of some barriers is lowering

Q Which are the barriers that prevent your company from having environmental initiatives?

% BARRIERS TO ENVIRONMENTAL INITIATIVES



SIGNIFICANT CHANGE
↓ vs 2013

Production cost remains the key barrier environmental initiatives, but **materials availability and quality, and adequate technology** are no longer considered unsurmountable barriers

Base: Total sample (2015) (241)



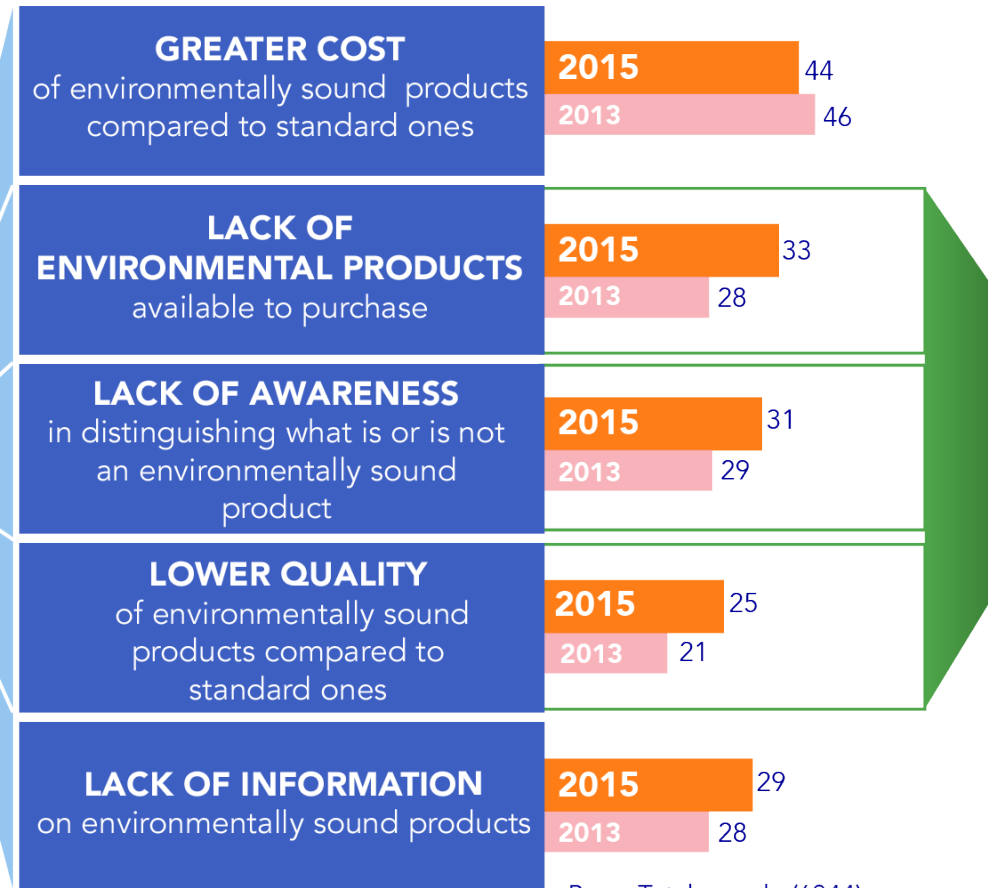
Also consumers mention cost as key barrier

And focus on lack of products, available information and quality



Q Which of the following aspects could make you / make you not buy an environmentally sound product?

%
BARRIERS TO
PURCHASE
ENVIRONMENTAL
PRODUCTS



↑ vs 2013

Base: Total sample (6044)

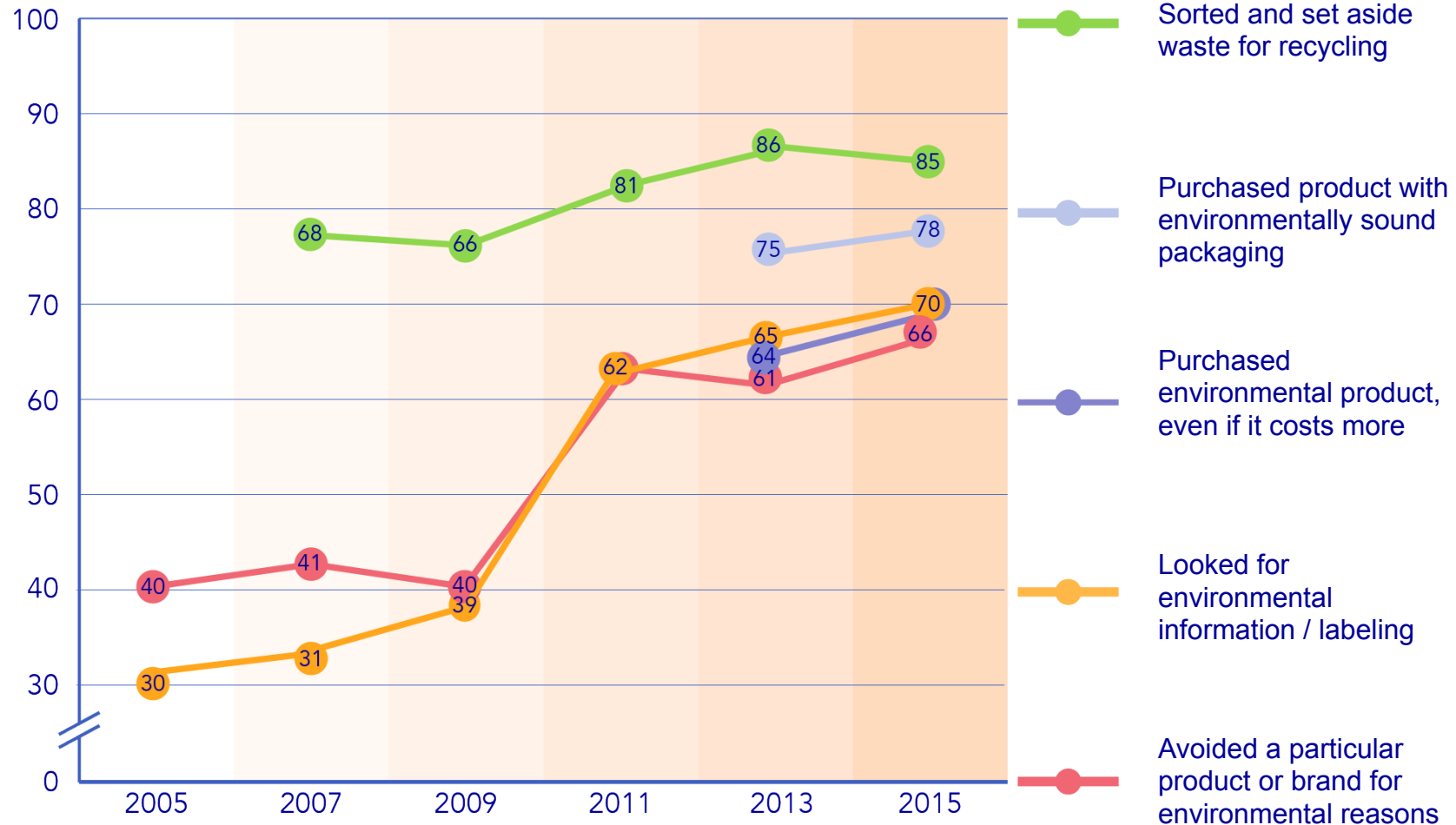


Environment is increasingly important in purchasing decisions



Below is a list of activities. Thinking about the past year, please indicate which of the following actions you have actually done:

ENVIRONMENTAL ACTIVITIES



ACTIVE CONSUMERS

Environment is an increasingly important factor in consumers' purchasing decisions



STEADILY GROWING SINCE 2005



Families with kids look more for environmental products

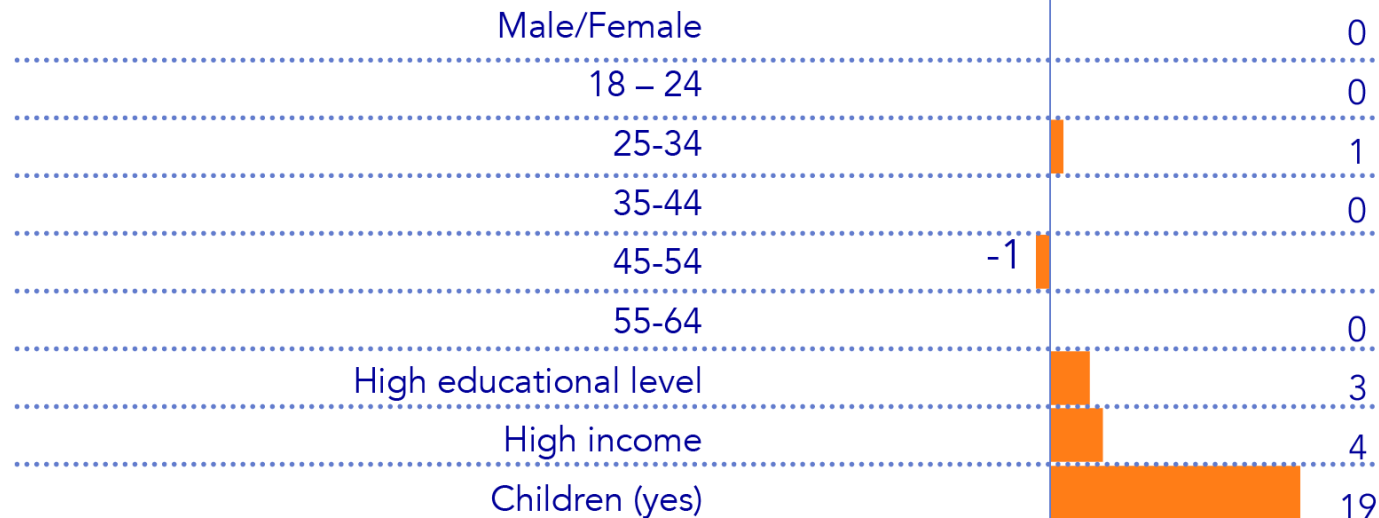


PURCHASED A PRODUCT WITH AN **ENVIRONMENTALLY FRIENDLY PACKAGING**



SOCIO-DEMO PROFILE

Differences from global average



Base (3174)

51% of consumers buy environmental products
“To preserve the environment for future generations”

Moreover, compared to total sample:

- More aware about environmental concepts (37% vs 29%)
- More interested in environmental topics (+7%)
- Pay more attention to environmental labelling (54% vs 39%)

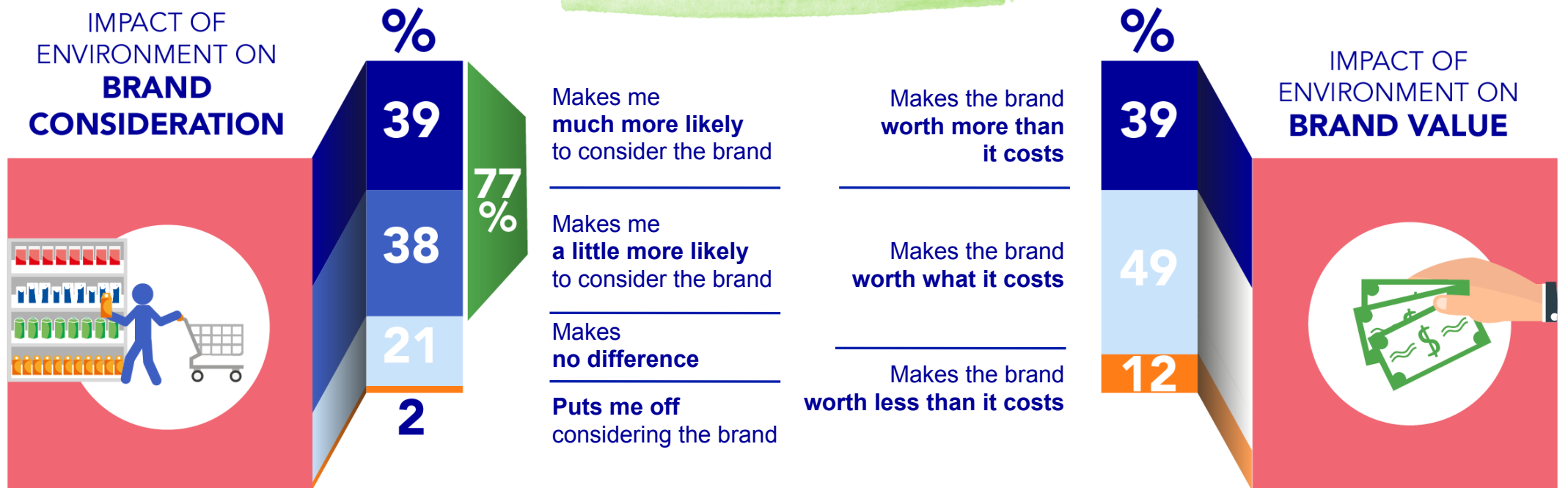


Impact on brand consideration and value



If you were about to choose a beverage brand, how would environmentally sound packaging affect your consideration of the brand?
How would environmentally friendly packaging change your opinion about the value of this brand?

AN ENVIRONMENTALLY SOUND PACKAGING...

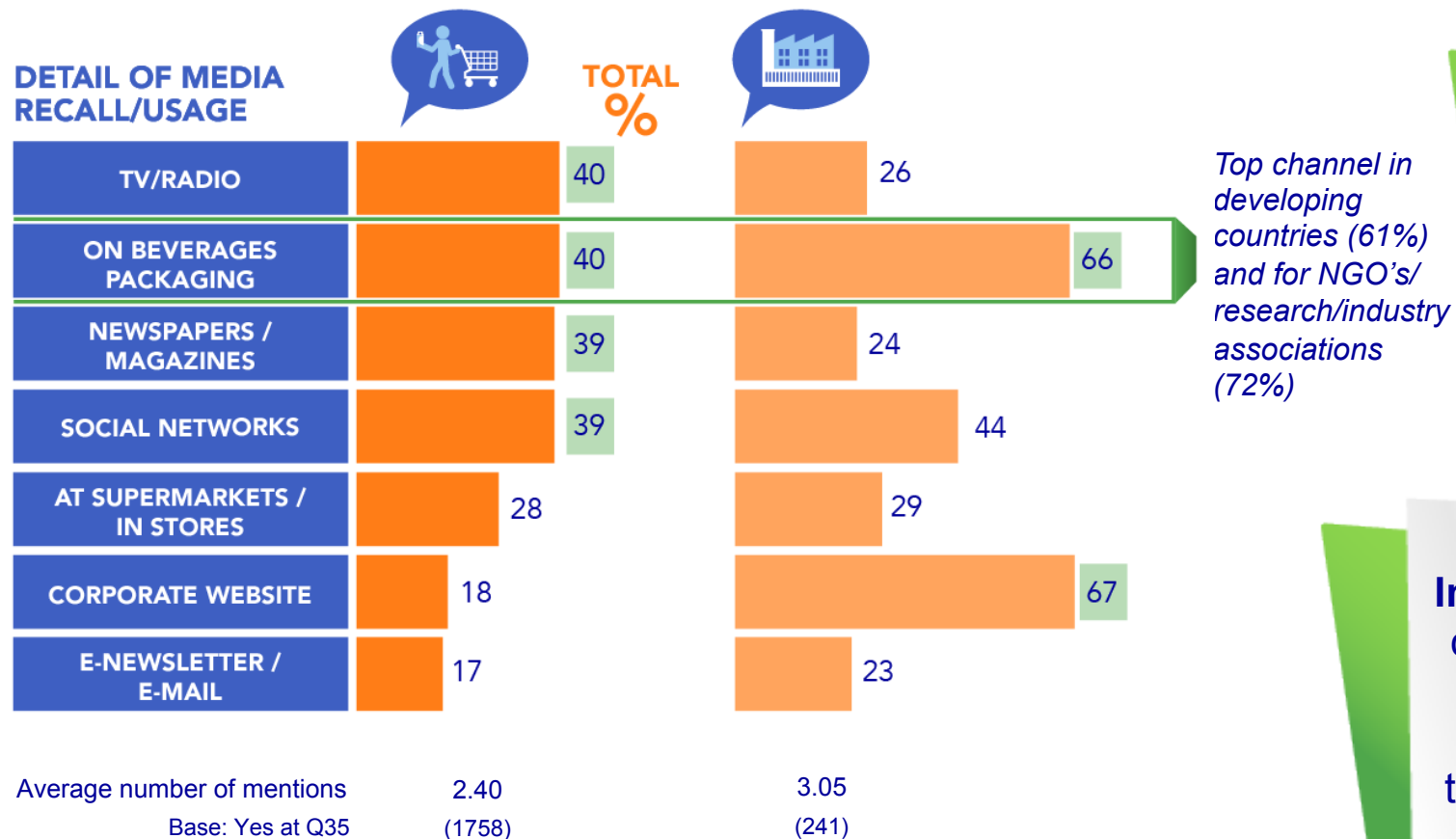




On-pack is an effective touch-point to communicate on packaging's environmental profile



Through which channel have you recently seen, read or followed any environmental information about beverage packaging? (Consumers)
 Through which channels does your company communicate its environmental initiatives to consumers? (Food Manufacturers and Retailers)



Top channel in developing countries (61%) and for NGO's/ research/industry associations (72%)

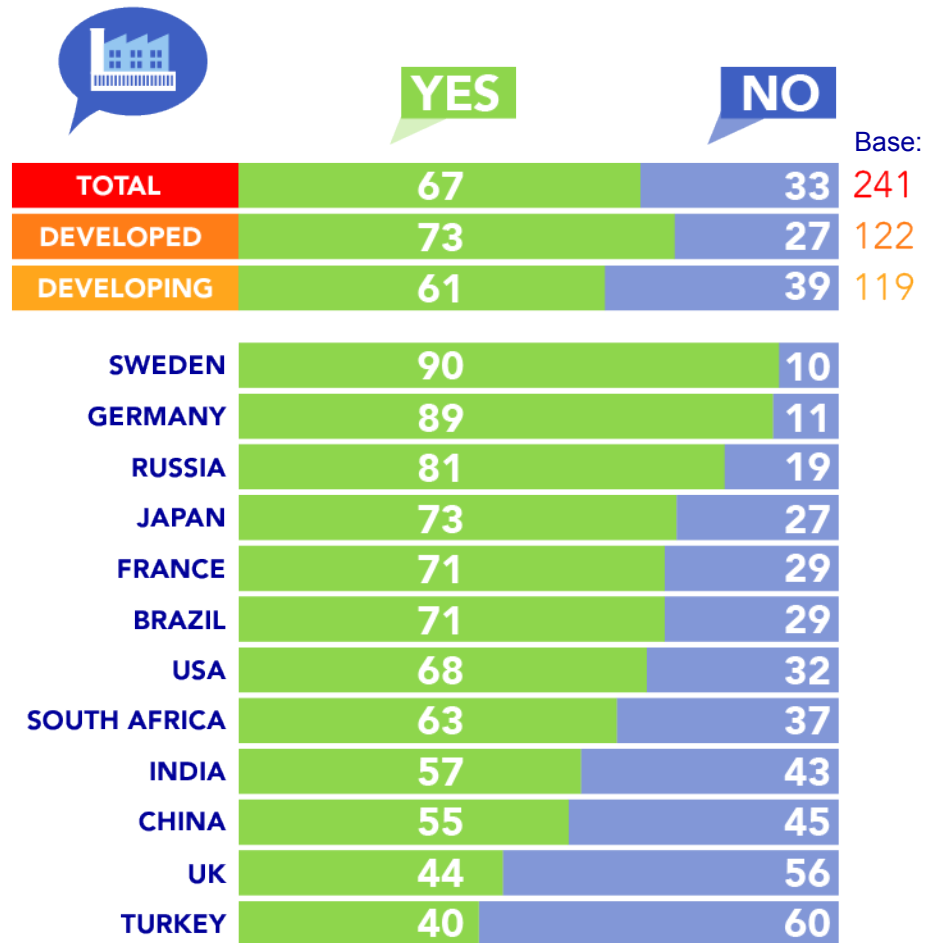
Social networks are increasingly used by consumers to look for environmental information, especially in emerging markets

Industry influencers widely communicate through their corporate website, while consumers prefer using traditional and social media

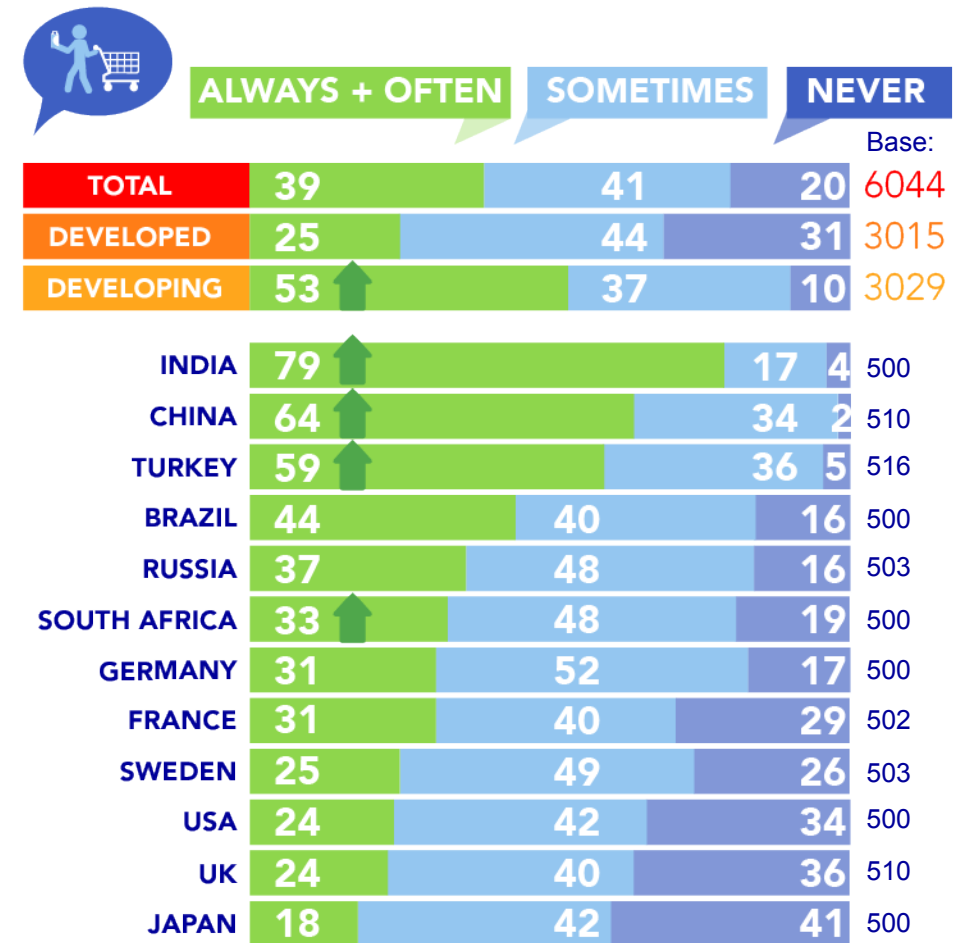


Consumers pay attention to environmental logos

Q Do you think consumers pay attention to environmental labeling / logos on packaging?



Q When you shop for beverages, do you typically look for environmental logos on the products you buy?





**For more information,
please contact**

Simona.Gatta@tetrapak.com
Corporate PR

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