

# Online survey on **recycling aspects**

Development 2014/15 vs. 2018/19

Total of > 350 participants

Munich, April 2019

# Content

- Who is PACOON?
- Our sustainability expertise
- The survey results



Since 2001  
in Munich



Since 2018  
in Hamburg



We are  
**PACOON**  
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# Our focus



## Strategy + Design

Branding, Naming, Packaging, Corporate



## Sustainability

Companies + Packaging







Benefit from our  
**sustainability  
expertise**







## **strategic consultation**

Analysis, First Steps, strategy, communication



## **packaging acts D + EU**

Effects on the branch & duties, chances for your brand



## **recyclability of packaging**

Assessment factors and screening, analyses



## **packaging approaches**

Development of new concepts, with added value



## **workshops & training sessions**

For packaging developers, buyer or marketing departments



## **material expertise**

Material Research, alternative fibres, Bio-plastics and barriers



## **total cost optimisation**

Do's and Don'ts on pack or off pack to make your commitment stand out positively



## **communication**

Do's and Don'ts on pack or off pack to make your commitment stand out positively



## **a big network**

Contact to suppliers of sustainable packaging solutions, institutions, universities in Germany and the EU and networking on sponsored projects

## Material research

for new materials, barriers, fibres etc.



from

**3.250 €**

per material

## One-day training



on sustainability trends incl. preparation/post-processing plus arrival/departure

approx.

**3.800 €**

## Developing new packaging concepts

Scribbles, material samples and essential features of the packaging ideas



from

**3.200 €**

## Recyclability assortment screening

of your packaging portfolio by laboratory analysis



from

**120 €**

per package

## Total cost optimization

and savings potential through holistic analysis



**FREE**

through provisioning the savings

# SOLPACK 3.0

Konferenz für nachhaltige Verpackungen

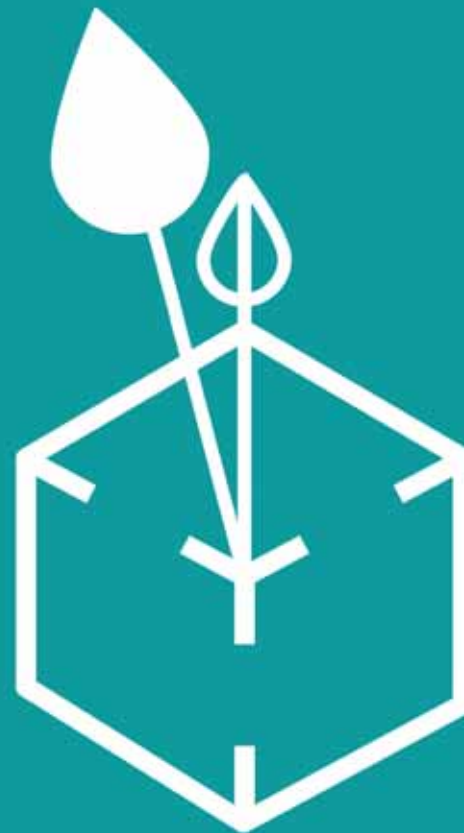
organisiert von:



unterstützt von:

bio2pack

UmweltCluster  
Bayern



**5. + 6. JUNI 2019**

HSBA Campus  
Adolphsplatz 6  
20457 Hamburg



Infos unter: [www.pacoon.de/SOLPACK](http://www.pacoon.de/SOLPACK)

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# Our online survey on recycling aspects 2014-2019

PACOON is Germany's leading agency for packaging design and sustainability. Since 2009, we have been working intensively on the topic of sustainable packaging in a 360° perspective from analysis to communication. SOLPACK® is our industry-wide, international conference for sustainable packaging.

Through our insights into this megatrend topic, we recognised years ago that recycling will become increasingly important. This has prompted us to launch an online survey on recycling attitudes in 2014.

After recycling has positioned itself as an important goal, especially since 2017 and with the new German Packaging Act since 2019 and the EU strategy, we wanted to survey the changed attitudes towards 2014/2015.

We know that the survey is not representative, but it clearly shows the changes over the last 4-5 years.



## Structure of the survey

Total number of participants from 21 May 2014 to 31 March 2019: 354

Call for survey about social media, own website and own newsletter

Extract of the results:

Period 21 May 2014 to 31 March 2015 = 140 participants; 47% men/ 53% women

Period October 2018 to March 2019 = 153 participants; 52 % men/ 48 % women

The responses between March 2015 and September 2018 = 61 participants were not included in the analysis.



Since not every question had to be answered by all participants, we have concentrated on the identification of percentages for reasons of simplification, which seems sufficient to us for the purpose of presenting the tendencies.

A subdivision according to age groups is not helpful because of the number of participants.



## Summary of results

- The majority of the participants are primarily interested in private recycling. The proportion of the total number of participants is virtually identical in both periods.
  - The importance of recycling has increased significantly in the last 4.5 years.
  - The importance of recycling continues to be regarded as increasing.
  - The information on recycling is estimated to be less good compared to 2014/15.
  - In some cases more information is perceived, but it is also considered less informative. Uncertainty about recycling is growing.
  - The desire for better information on waste treatment has increased significantly.
  - The city/municipality sees a significantly higher proportion of this as a duty to provide information. But the federal government, the recycling industry and product manufacturers are also in demand.
  - There are clear signs of a rethink towards more waste separation.
  - A change in the materials collected compared to 2014/15 is not possible.
- 



## Summary of results (continued)

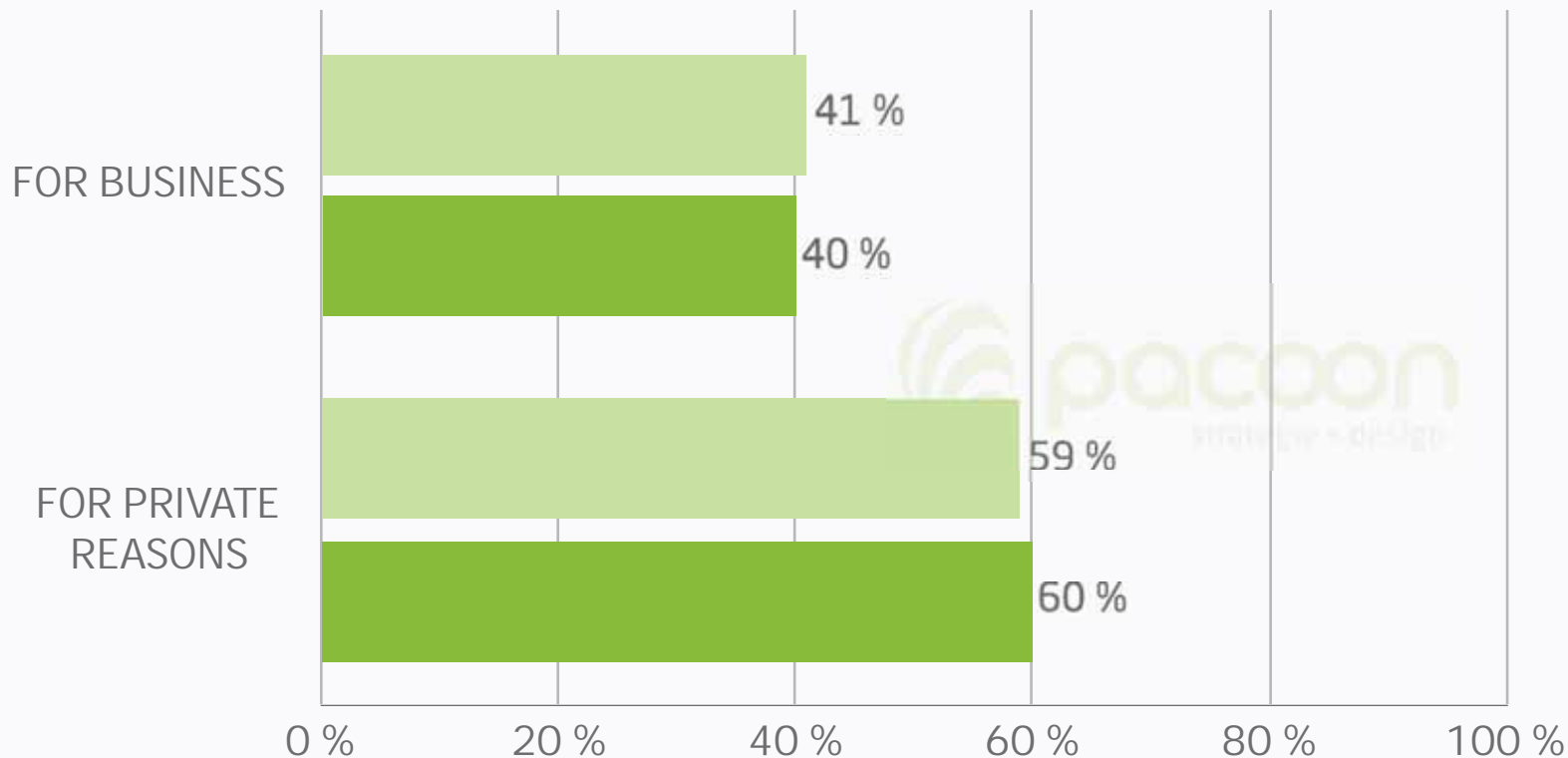
- Is there less packaging waste collected from households or is this in the sample (more urban households that participated)?
- There has been an increase in bio-waste composting.
- A priority towards reusable packaging is clearly visible.
- Waste separation is now considered necessary. The Moravian idea of 'separation is not worth it, everything is incinerated anyway' is being much more strongly questioned.
- The principle of waste separation can be made even easier or better explained.
- The desire for simple and neutral information on collection/separation has increased significantly.
- Recycling as a raw material recovery has penetrated strongly into the consciousness.
- Waste incineration is no longer seen primarily as air pollution, but for the most part also as energy recovery.
- There is a need for much more information and education for households.
- Clear change: Nearly 3 of 4 wish today the clearing-up with children.



# Are you mainly interested in recycling for business or private purposes?

The majority of the participants are privately interested in recycling.

The proportion of the total number of participants is virtually identical in both periods.



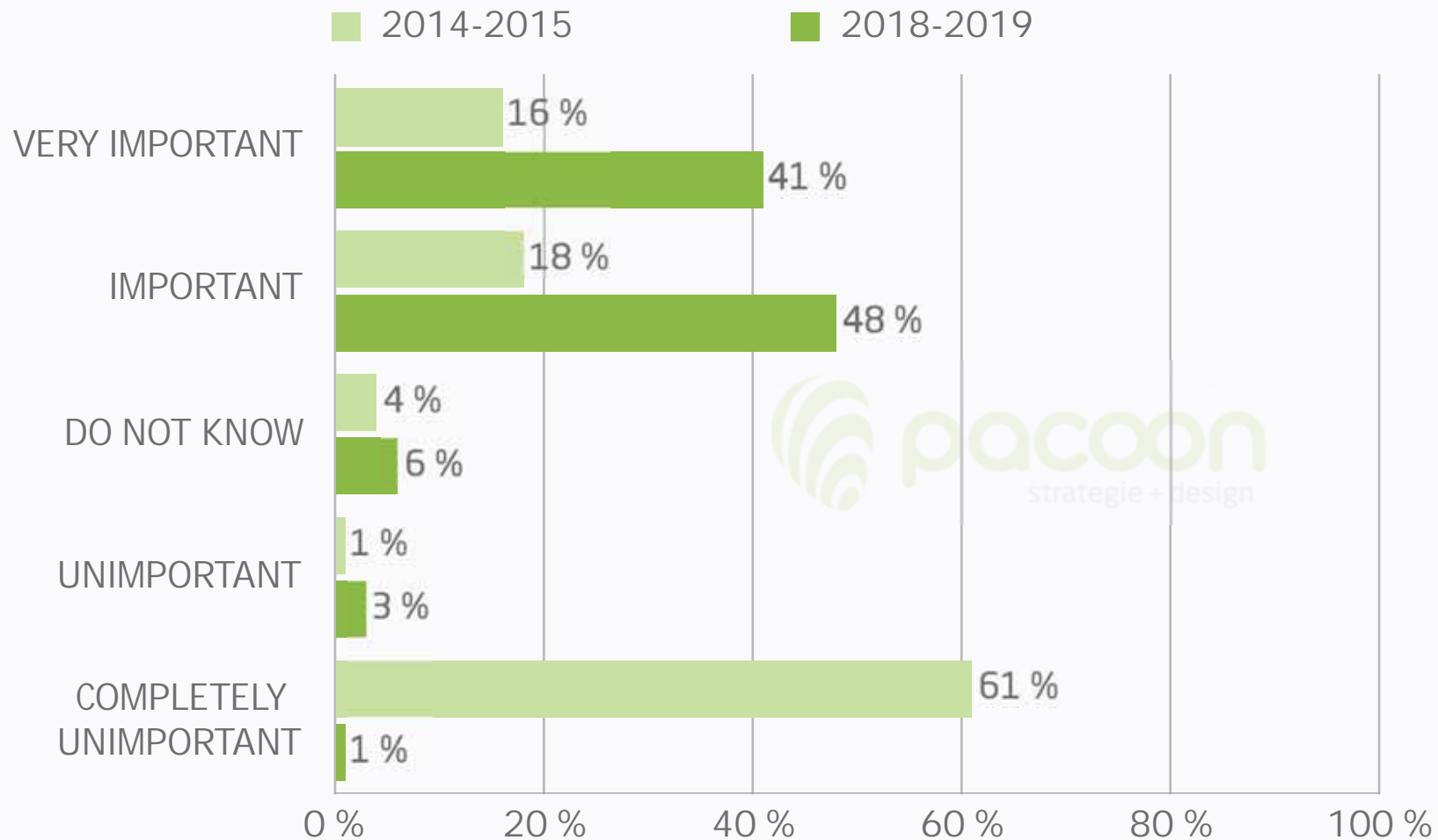
Source: PACOON, own online survey; excerpt of the time periods 05/2014-4/2015 and 10/2018-3/2019  
293 participants from a total of >350 participants - quotes and excerpts only with mention of pacoön® as source





# Is the subject of recycling important or not important for you personally?

The importance of recycling has increased significantly in the last 4.5 years.

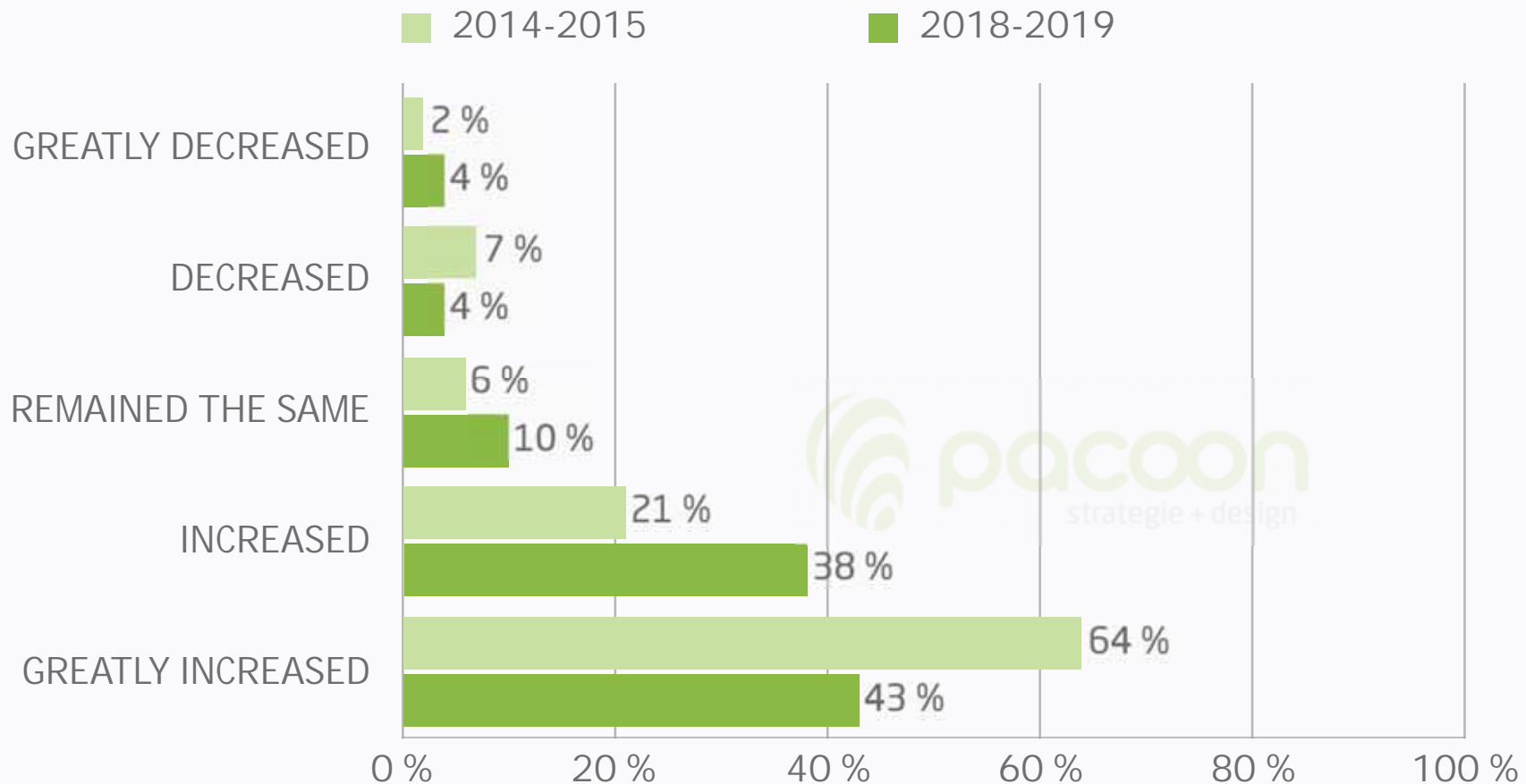


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# Do you believe that the importance of recycling has decreased, increased or remained constant in recent years?

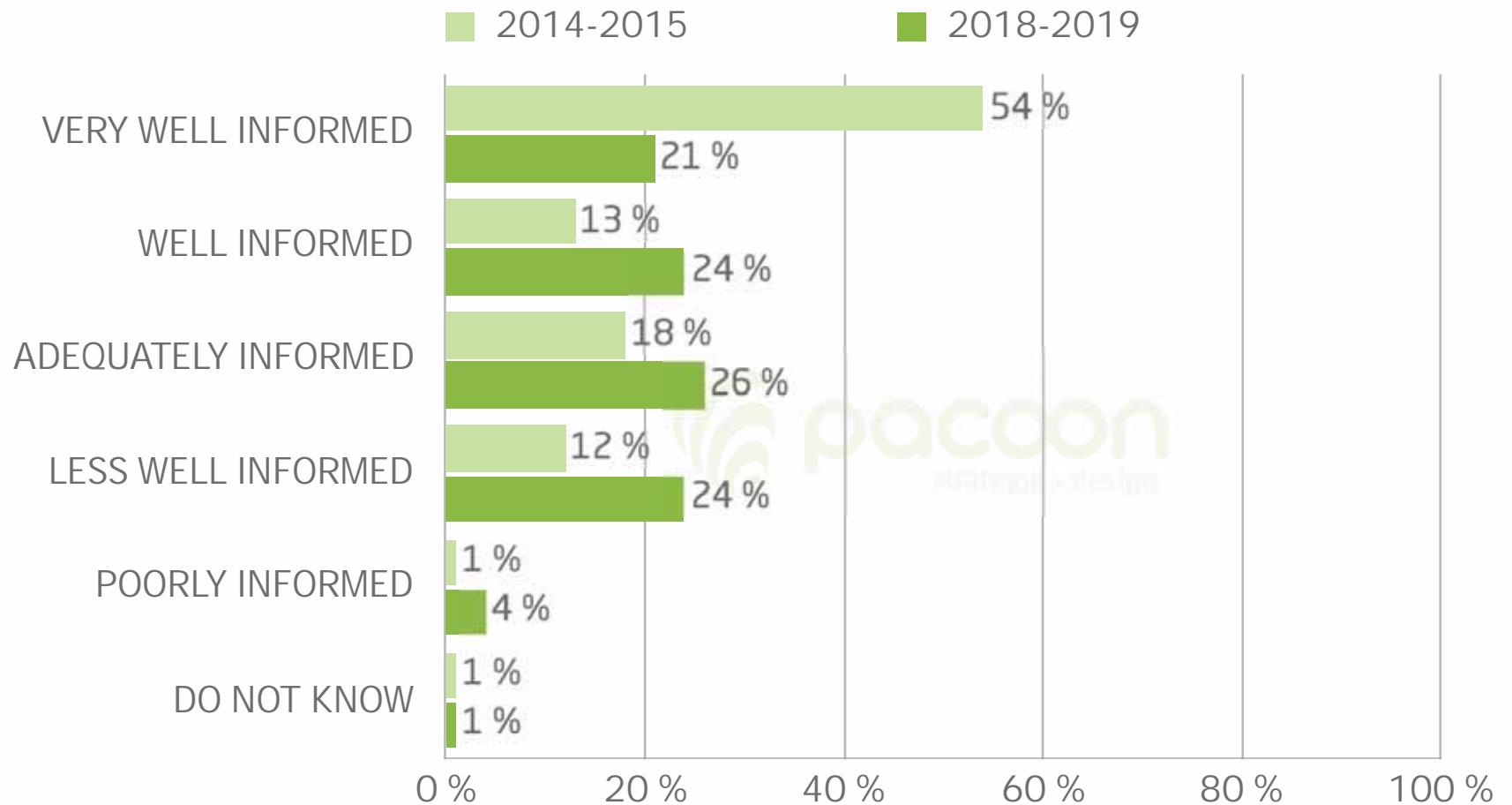
The importance of recycling continues to be seen as increasing.



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# Do you personally feel well informed about recycling?

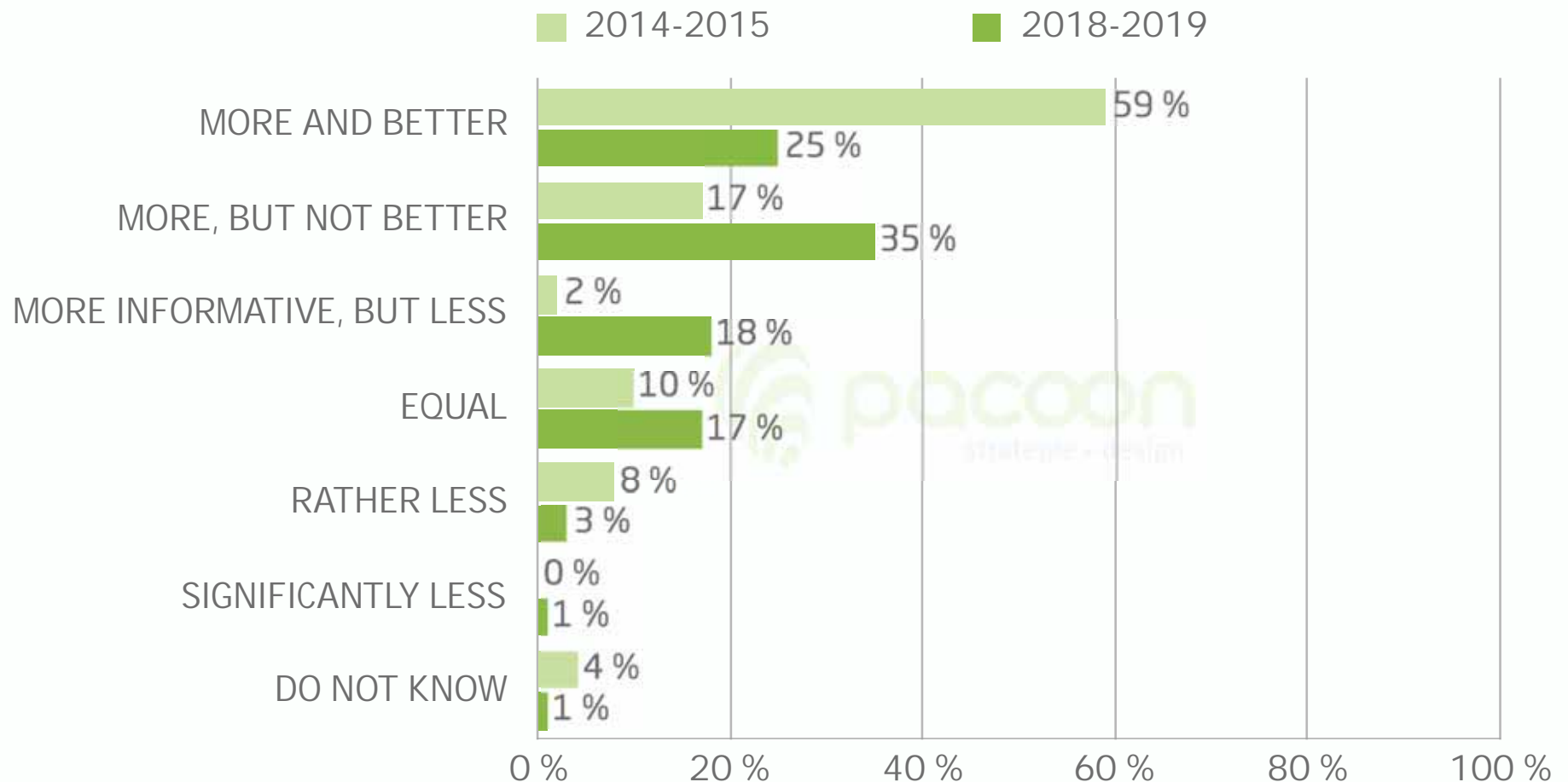
The information on recycling is estimated to be less good compared to 2014/15.



Source: PACOON, own online survey; excerpt of the time periods 05/2014-4/2015 and 10/2018-3/2019  
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# Would you say that information about recycling has increased in recent years?

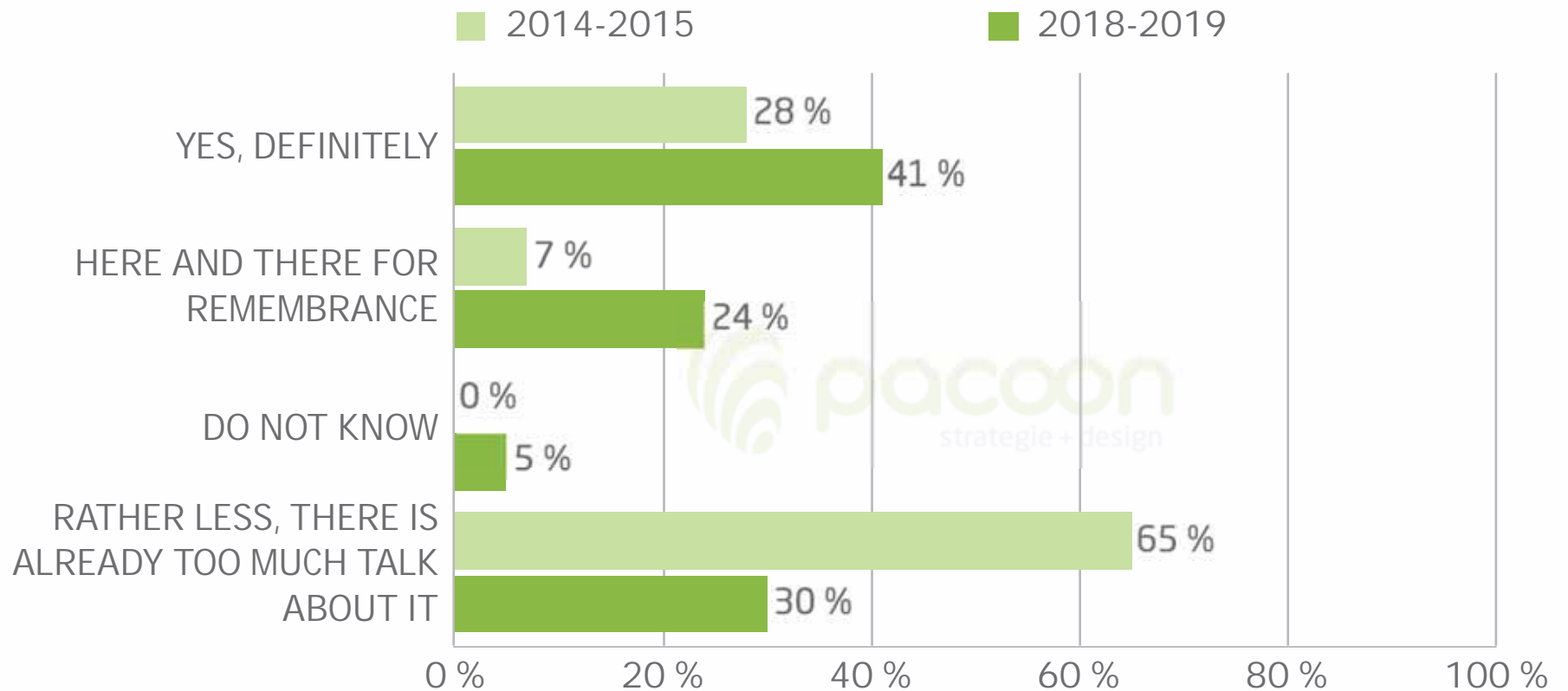
In some cases more information is perceived, but it is also considered less informative. Uncertainty about recycling is growing.



Source: PACOON, own online survey; excerpt of the time periods 05/2014-4/2015 and 10/2018-3/2019  
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# Should **you** be better informed about the issue of "how to deal with waste"?

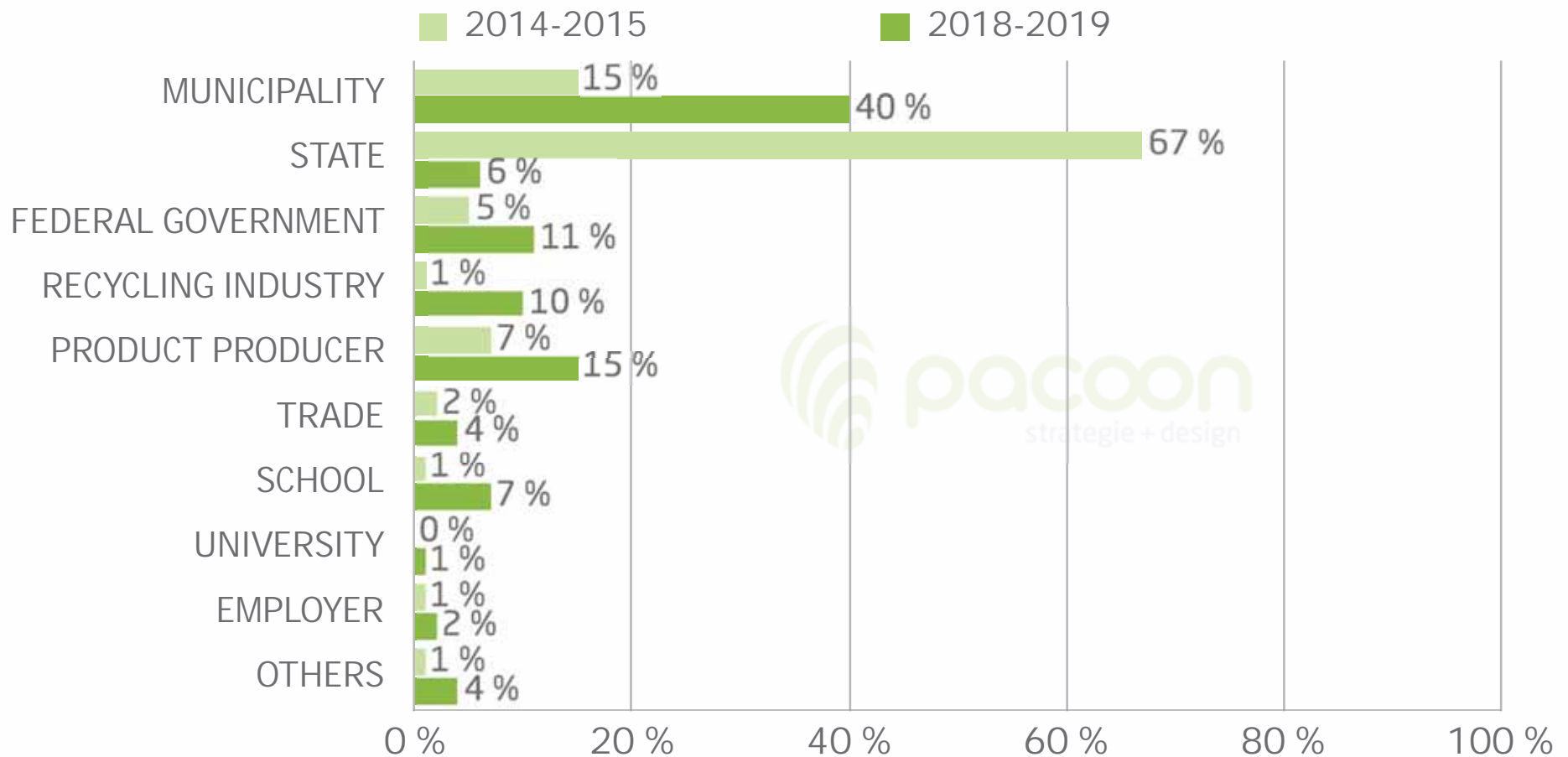
The desire for better information on waste treatment has increased significantly.



Source: PACOON, own online survey; excerpt of the time periods 05/2014-4/2015 and 10/2018-3/2019  
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# Who should best inform about recycling and waste treatment? Please select an institution.

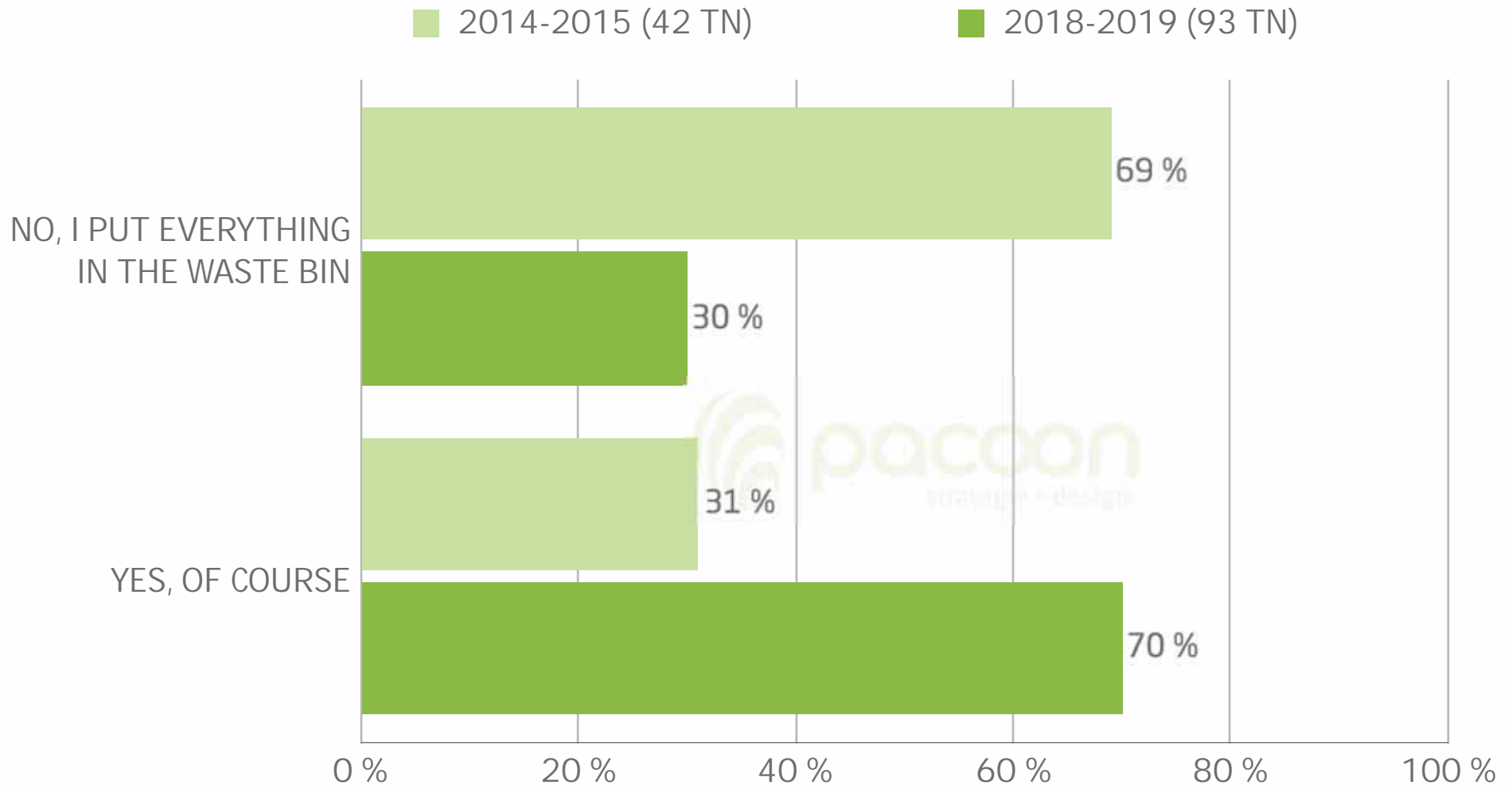
Most of the questioned see the municipality in the duty of information. But the federal government, the recycling industry and product manufacturers are also in demand.



Source: PACOON, own online survey; excerpt of the time periods 05/2014-4/2015 and 10/2018-3/2019  
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# Do you separate your household waste?

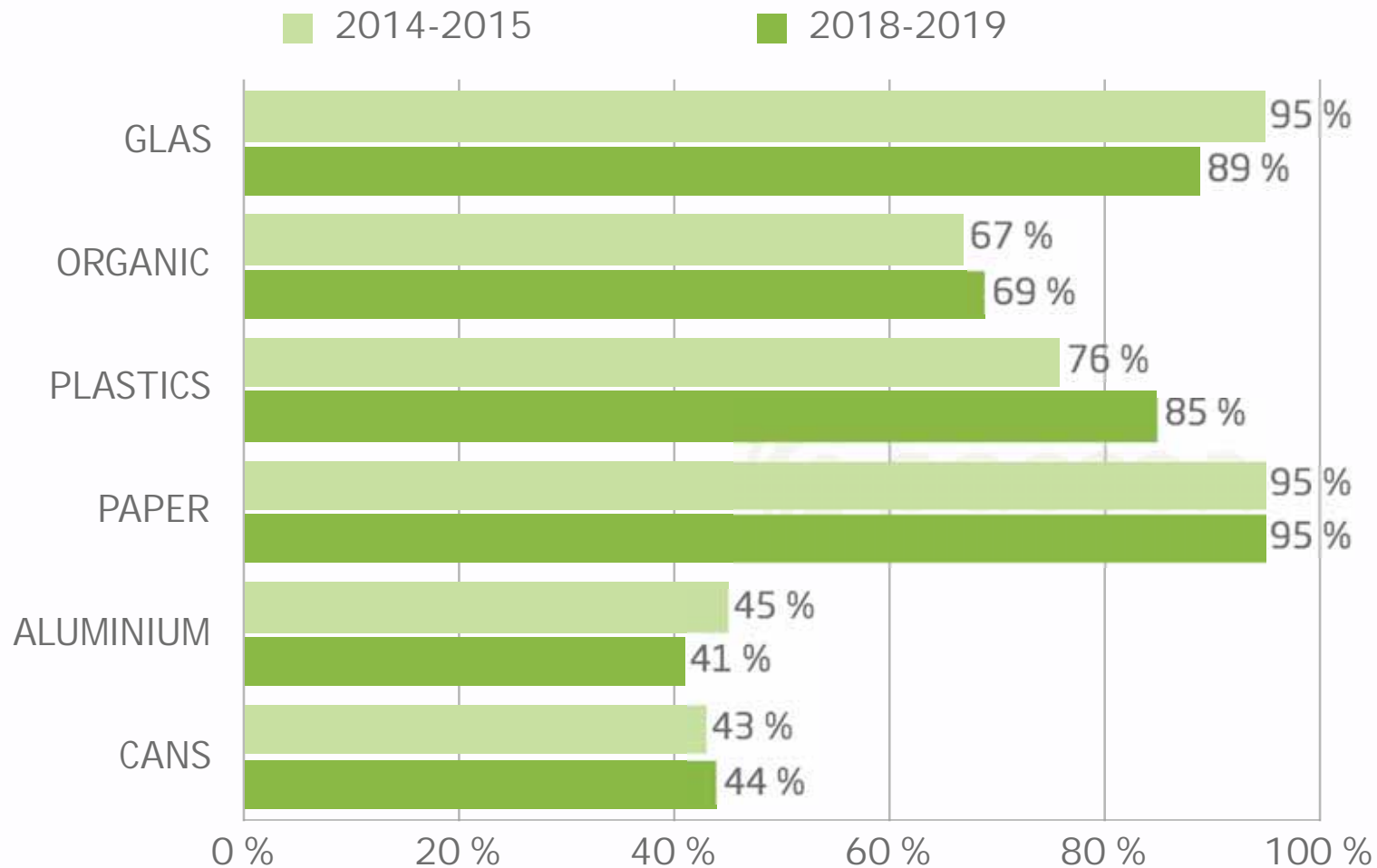
There are clear signs of a rethink towards more waste separation.



Source: PACOON, own online survey; excerpt of the time periods 05/2014-4/2015 and 10/2018-3/2019  
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# In which categories do you separate your packaging waste?

A change in the materials collected compared to 2014/15 is not evident.



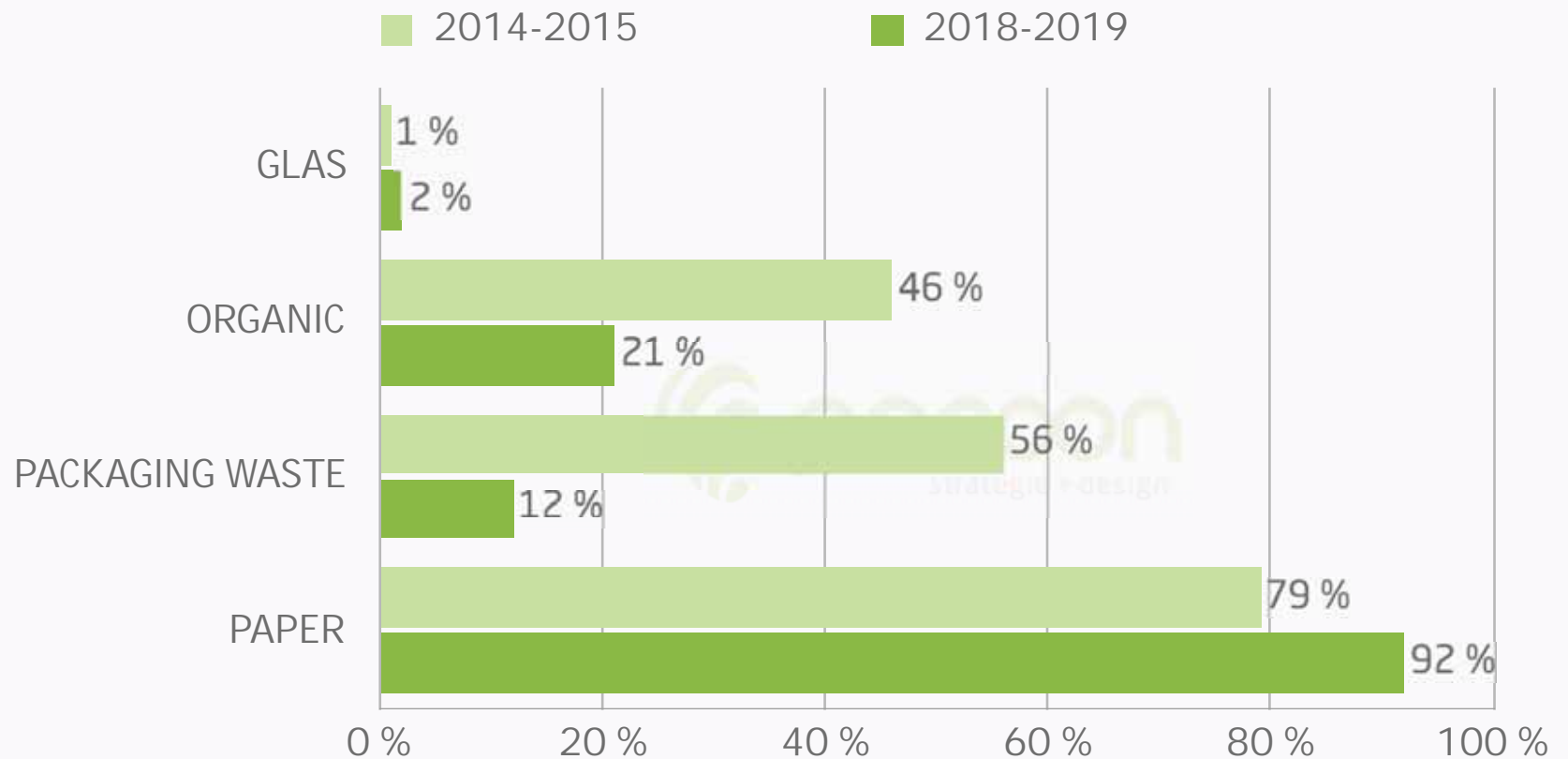
Source: PACOON, own online survey; excerpt of the time periods 05/2014-4/2015 and 10/2018-3/2019  
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# Which packaging waste is collected from your home?

Is there less packaging waste collected from households or is this due to the survey sample (more urban households that participated)?

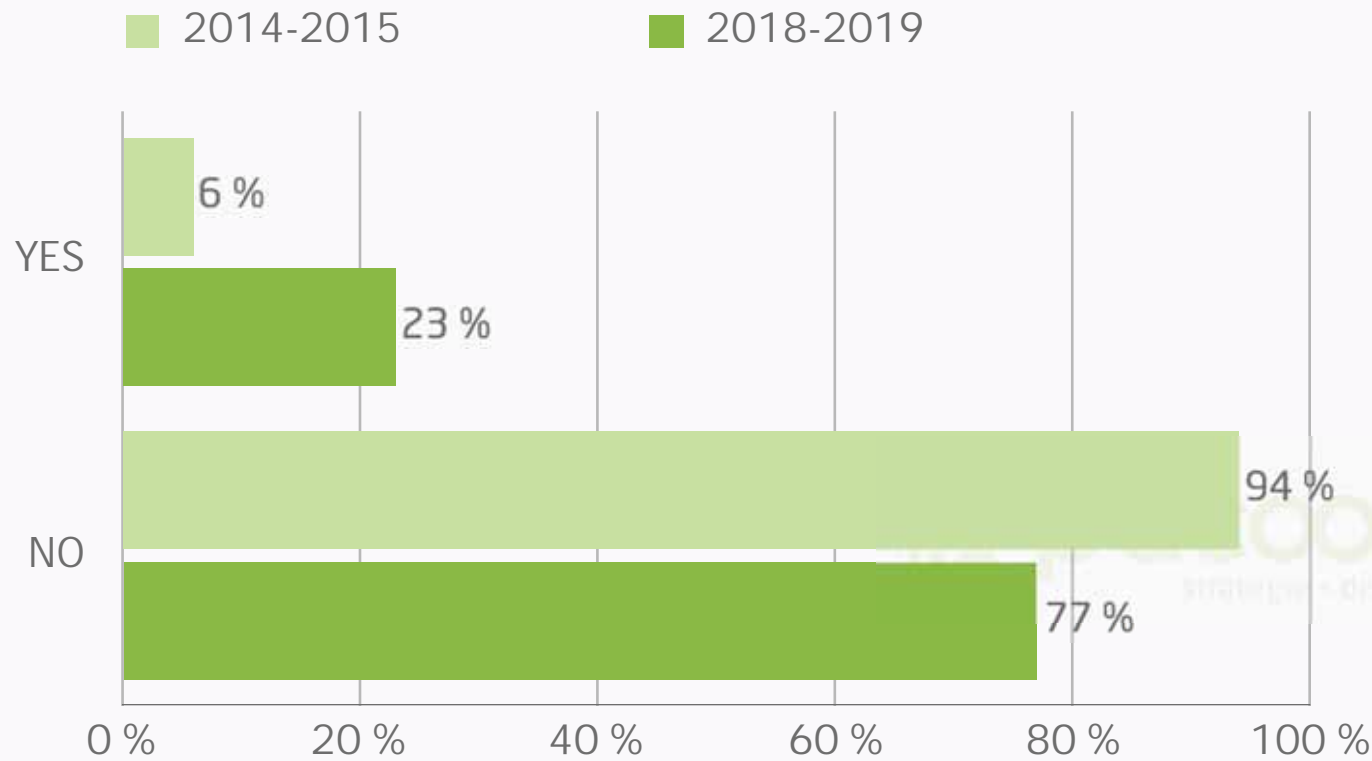


Source: PACOON, own online survey; excerpt of the time periods 05/2014-4/2015 and 10/2018-3/2019  
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# Do you compost your own organic waste?

There has been an increase in organic waste composting.

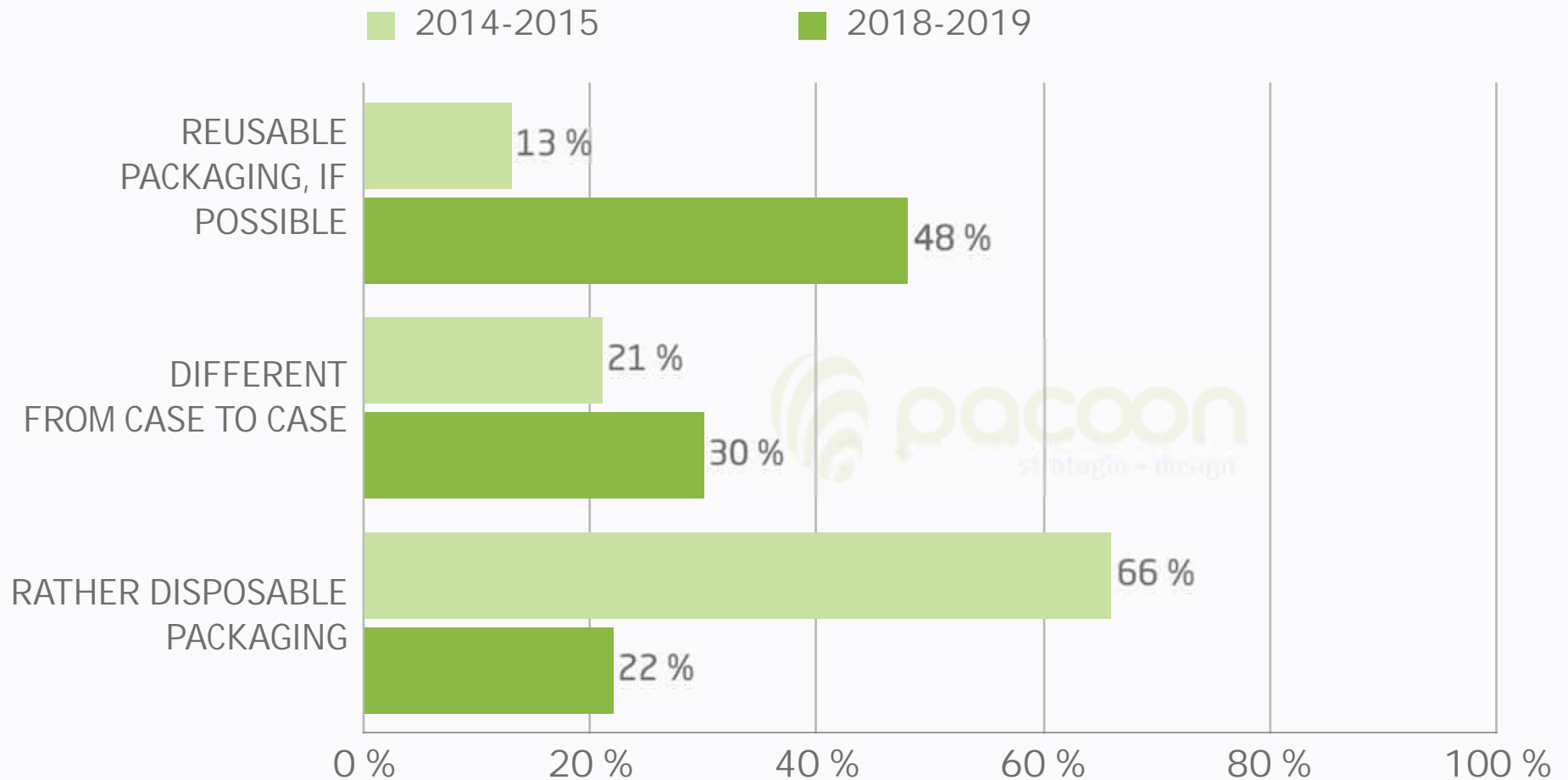


Source: PACOON, own online survey; excerpt of the time periods 05/2014-4/2015 and 10/2018-3/2019  
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# Do you prefer disposable or reusable packaging for your purchases?

A priority towards reusable packaging can be clearly seen.

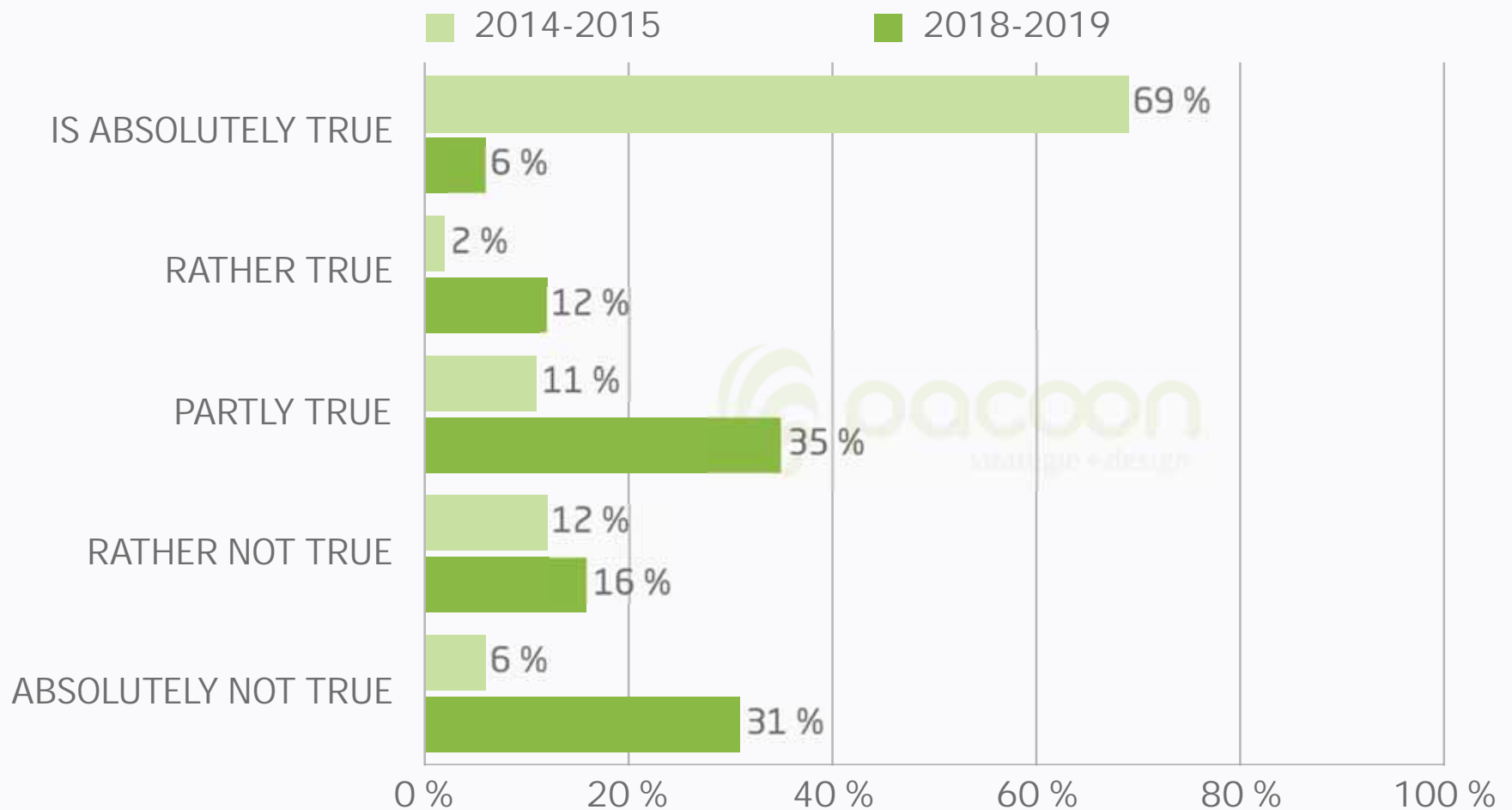


Source: PACOON, own online survey; excerpt of the time periods 05/2014-4/2015 and 10/2018-3/2019  
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# Waste separation is unnecessary - everything is combusted anyway

Waste separation is now considered necessary. The question of 'separation is not worth it, everything is incinerated anyway' is much more strongly questioned.

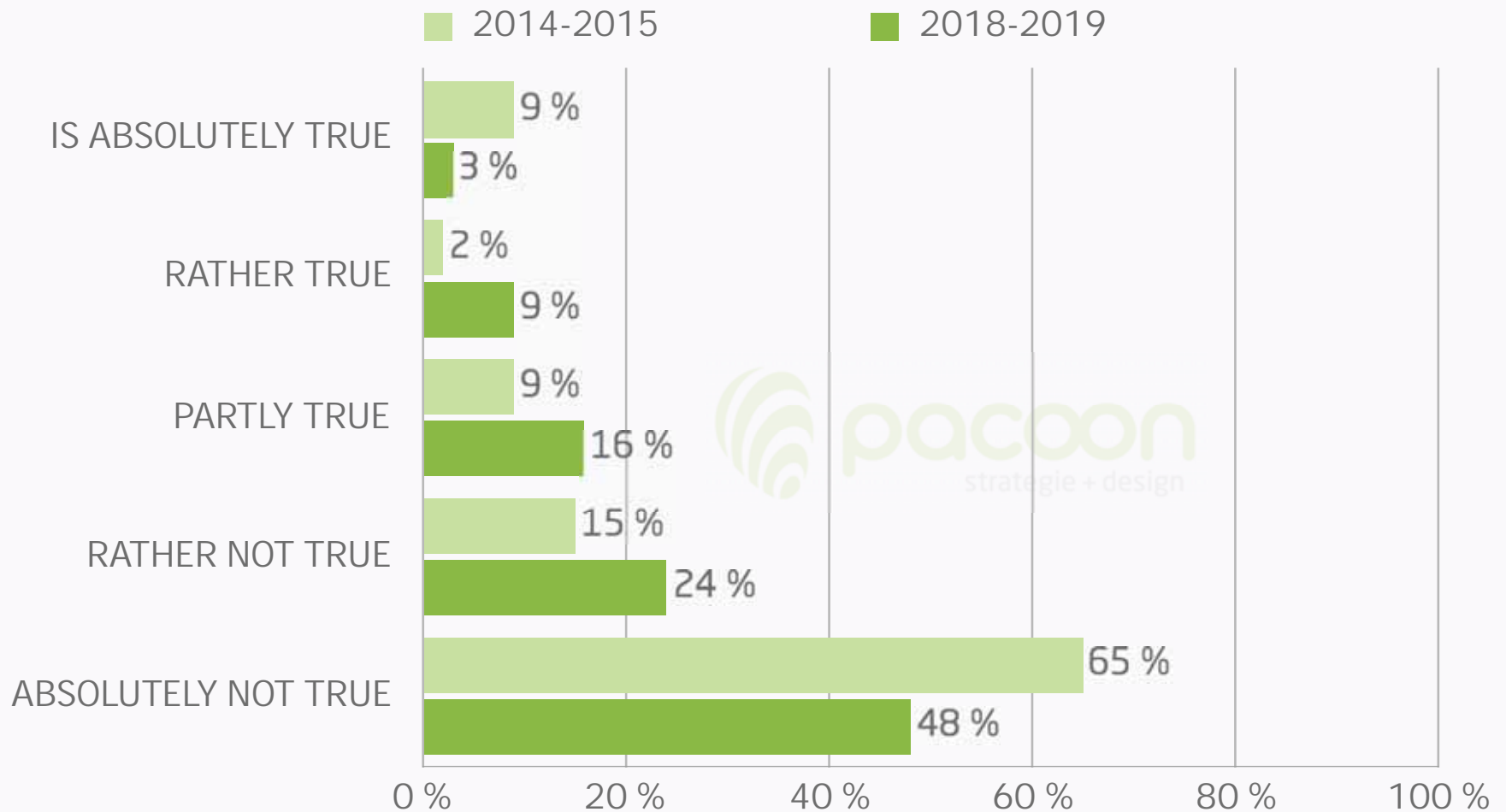


Source: PACOON, own online survey; excerpt of the time periods 05/2014-4/2015 and 10/2018-3/2019  
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# Waste separation is too complicated - how should I know how to separate what, where?

The principle of waste separation can be made even easier or better explained.

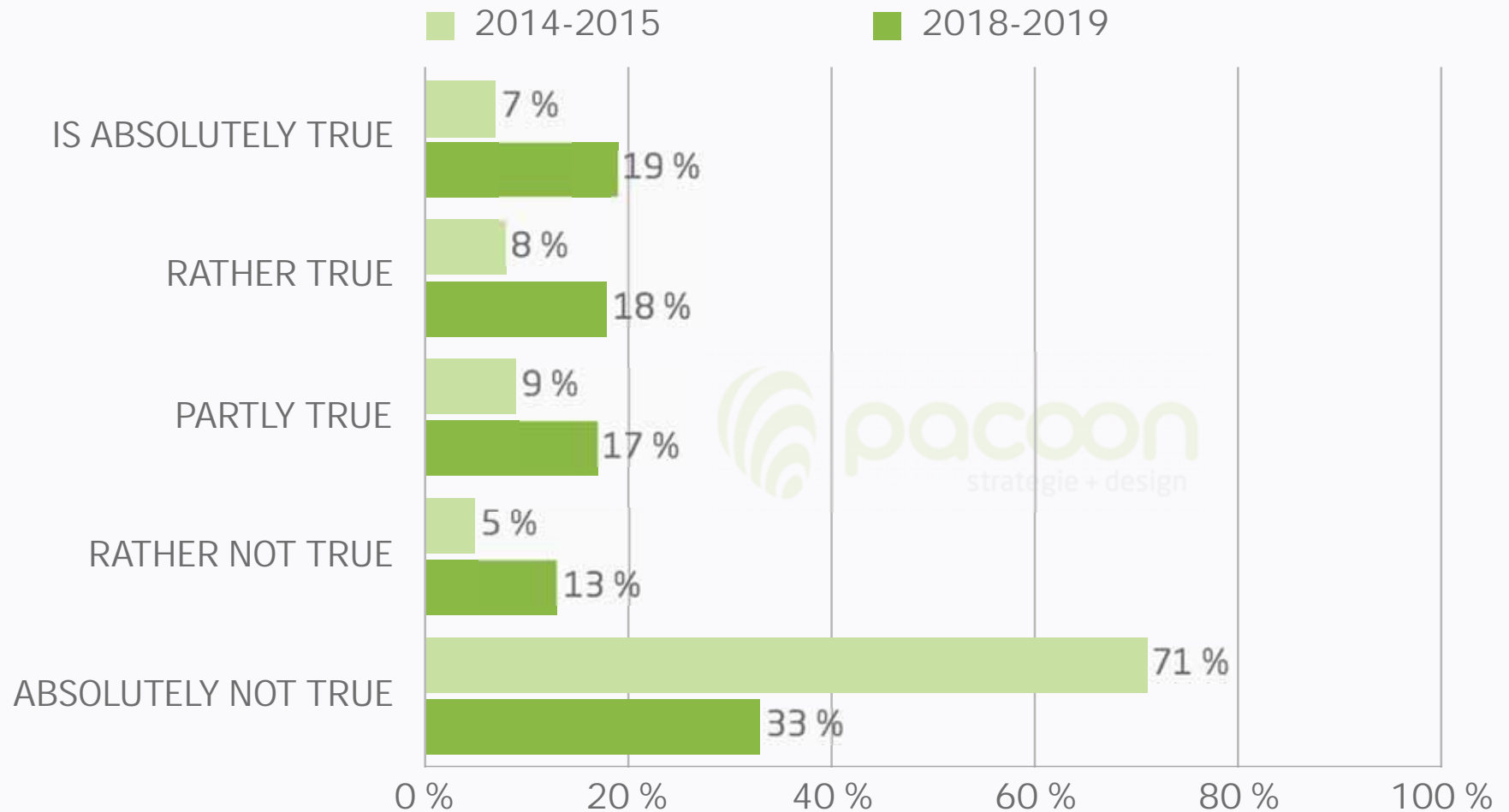


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# The collection/separation of waste should be easier to handle, then I would operate it more strongly.

The desire for simplicity of collection/separation has increased significantly.

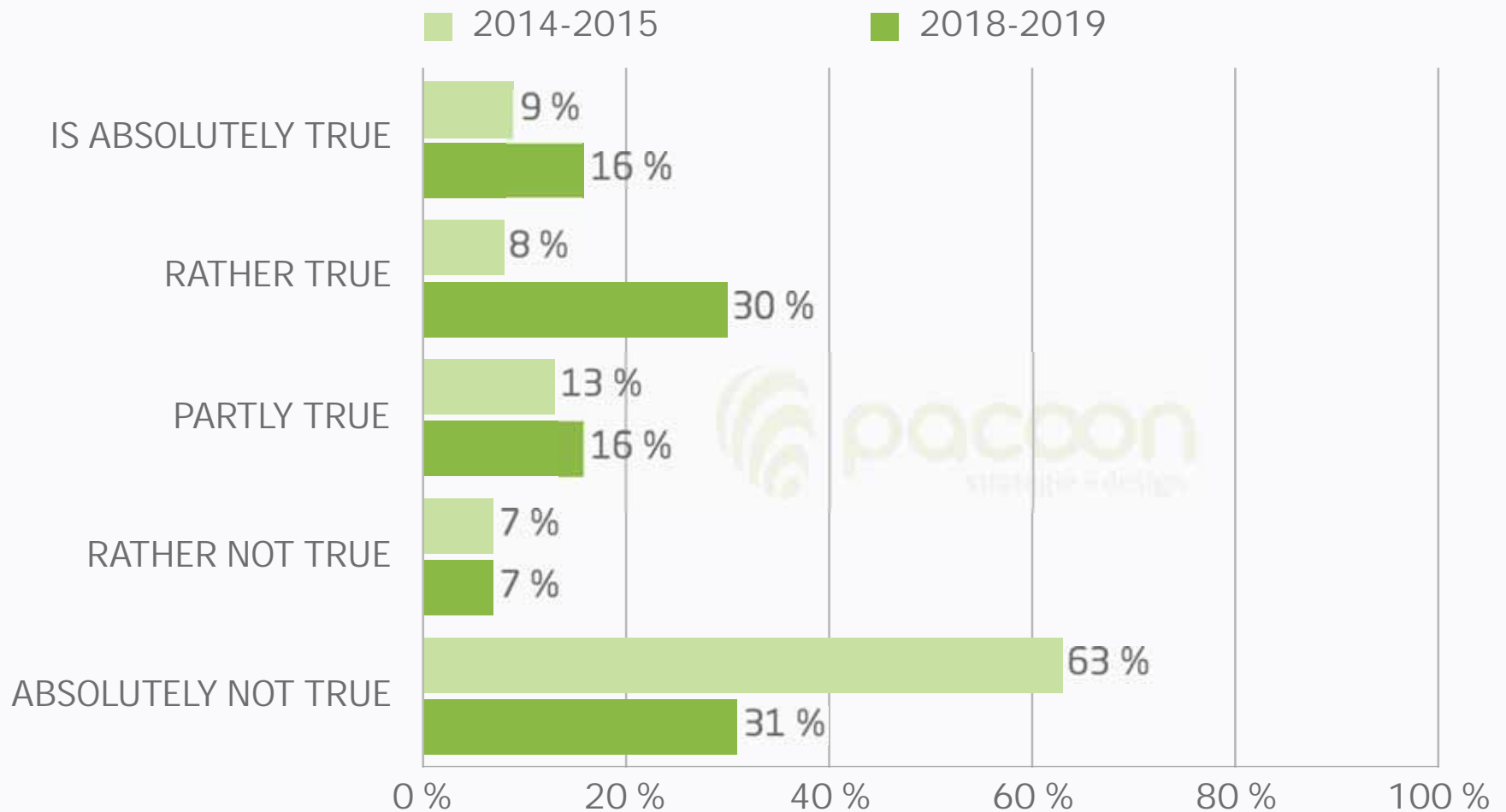


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# The informations are far too confusing, there should be a neutral source of information.

The informations should be more neutral and clearer.

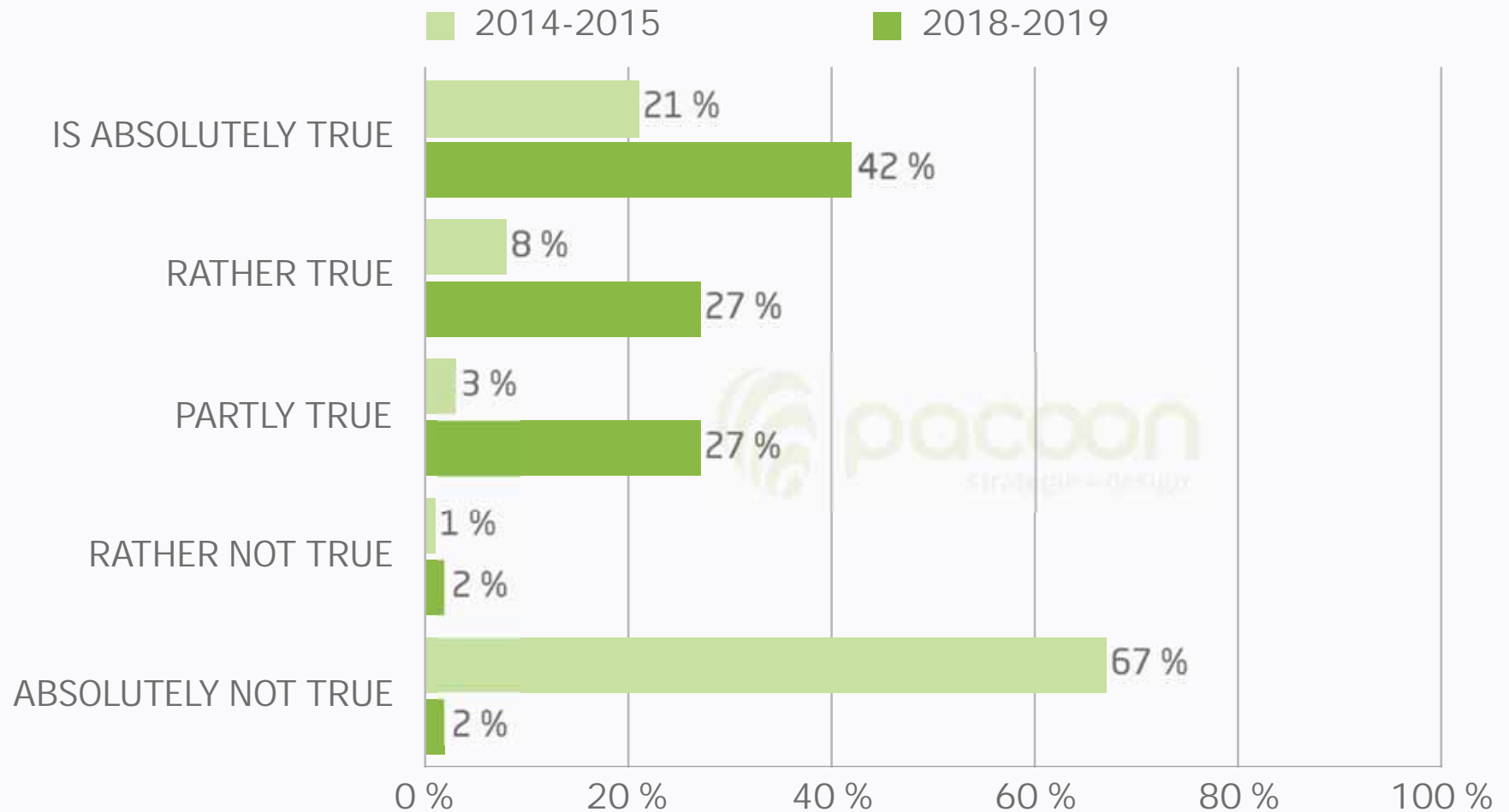


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# Recycling helps to recover important resources.

Recycling as a resource recovery has gained a lot of attention.



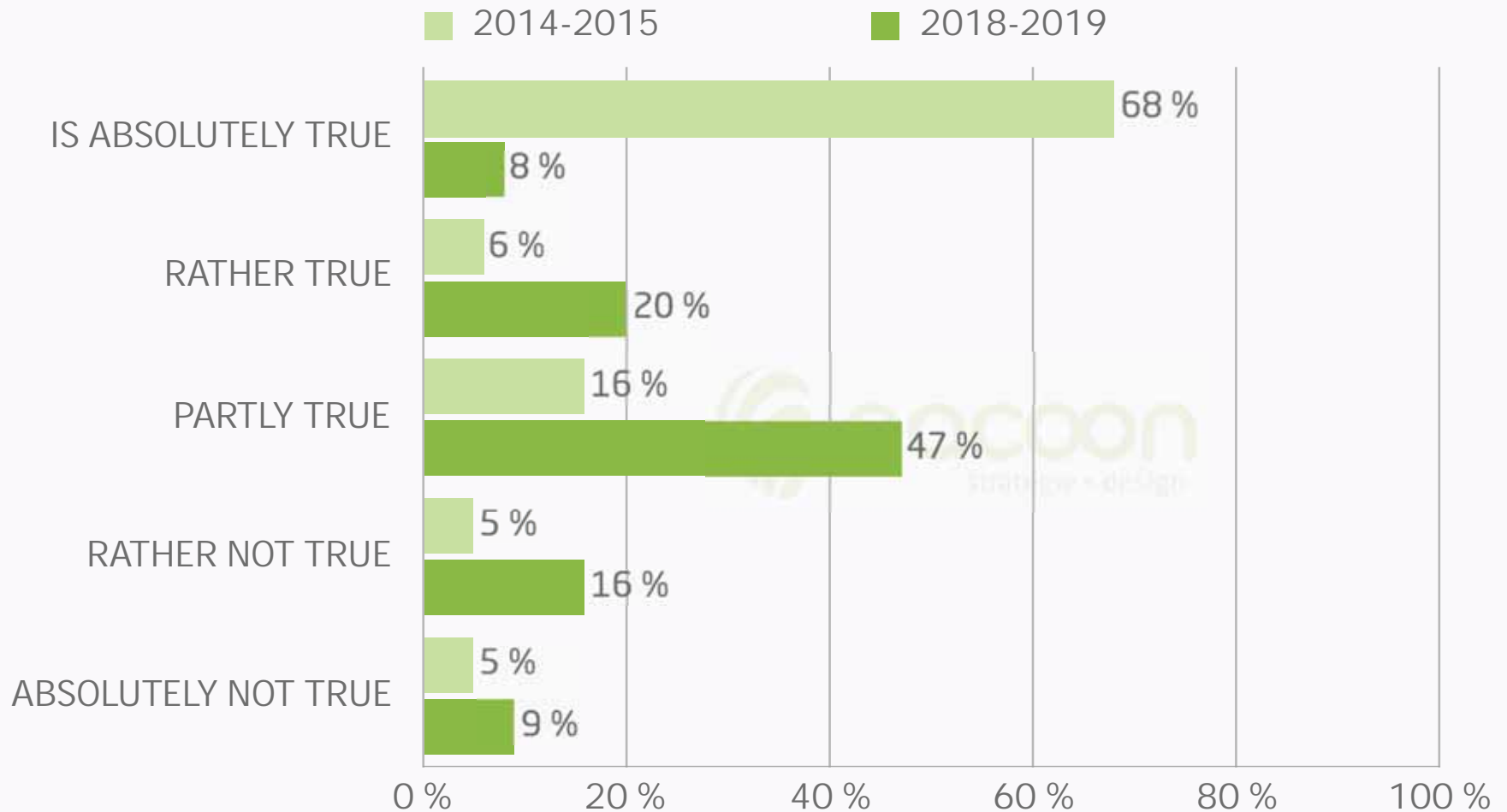
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# The combustion of waste is primarily air pollution.

Waste combustion is no longer seen primarily as air pollution...

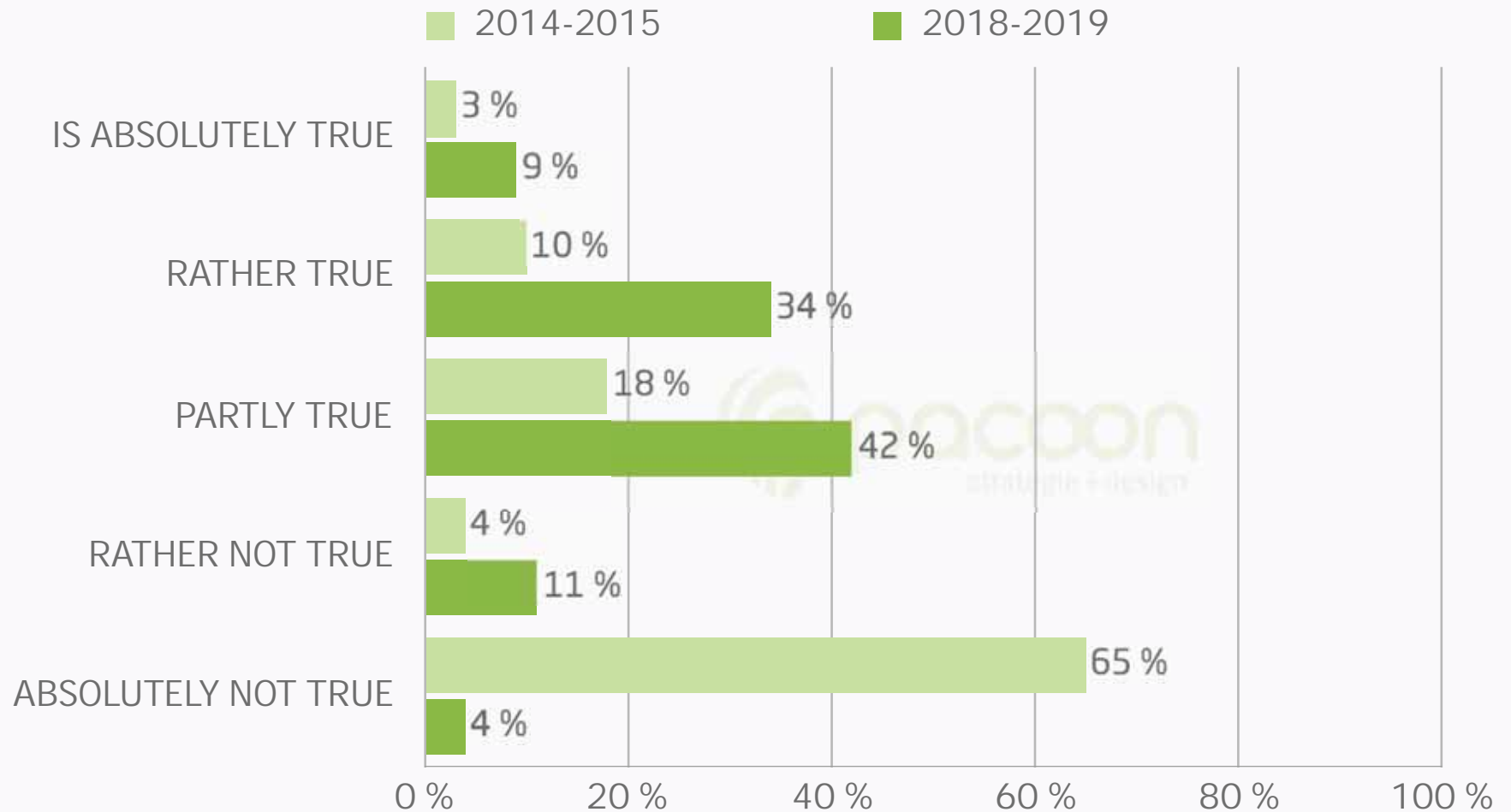


Source: PACOON, own online survey; excerpt of the time periods 05/2014-4/2015 and 10/2018-3/2019  
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# Combustion of waste generates at least heat and energy that can be used.

... but for the most part also as energy source.

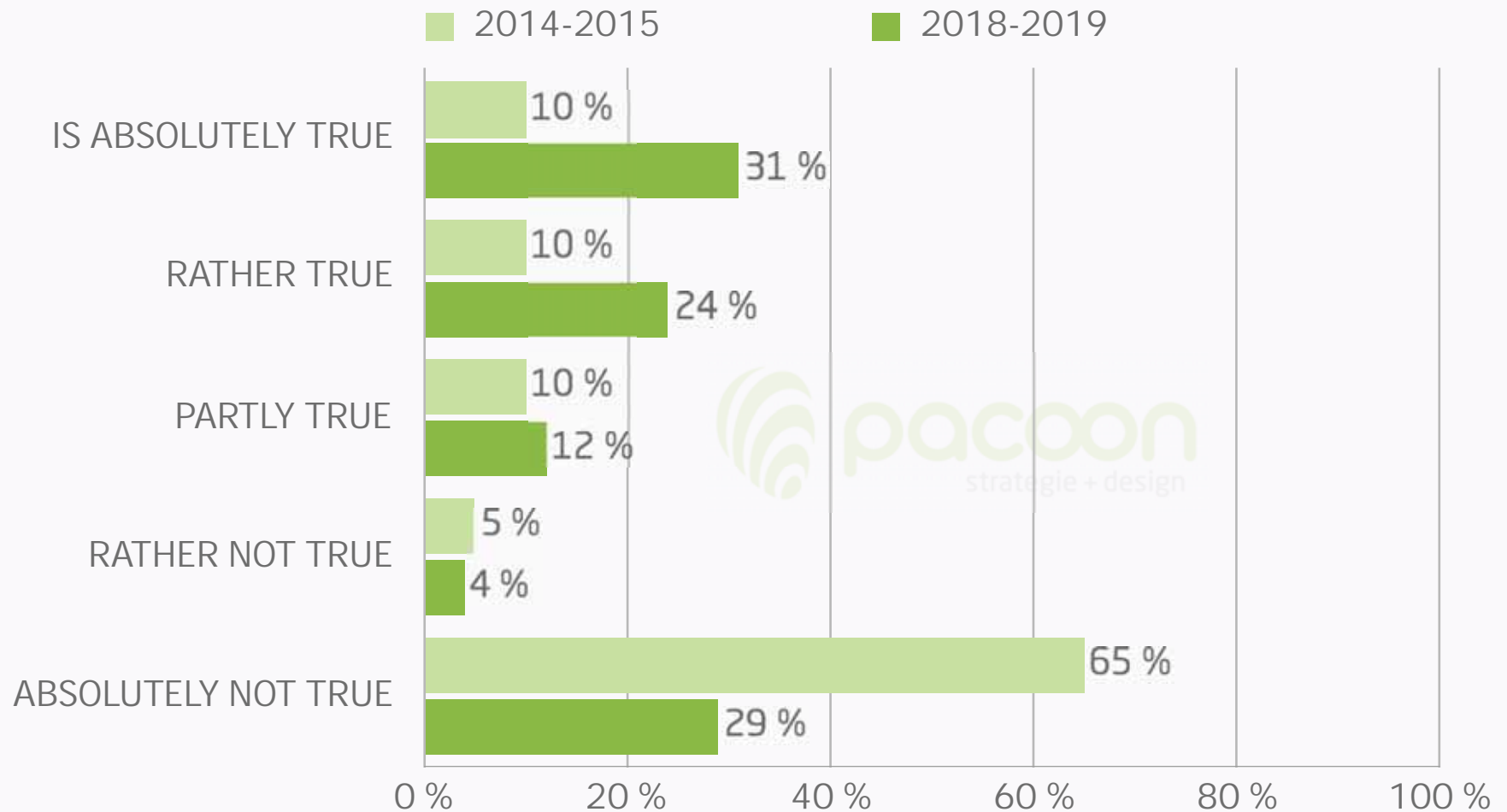


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# There should be a recycling manual for each household in which the essential information is collected.

There is a need for much more information and education for households.

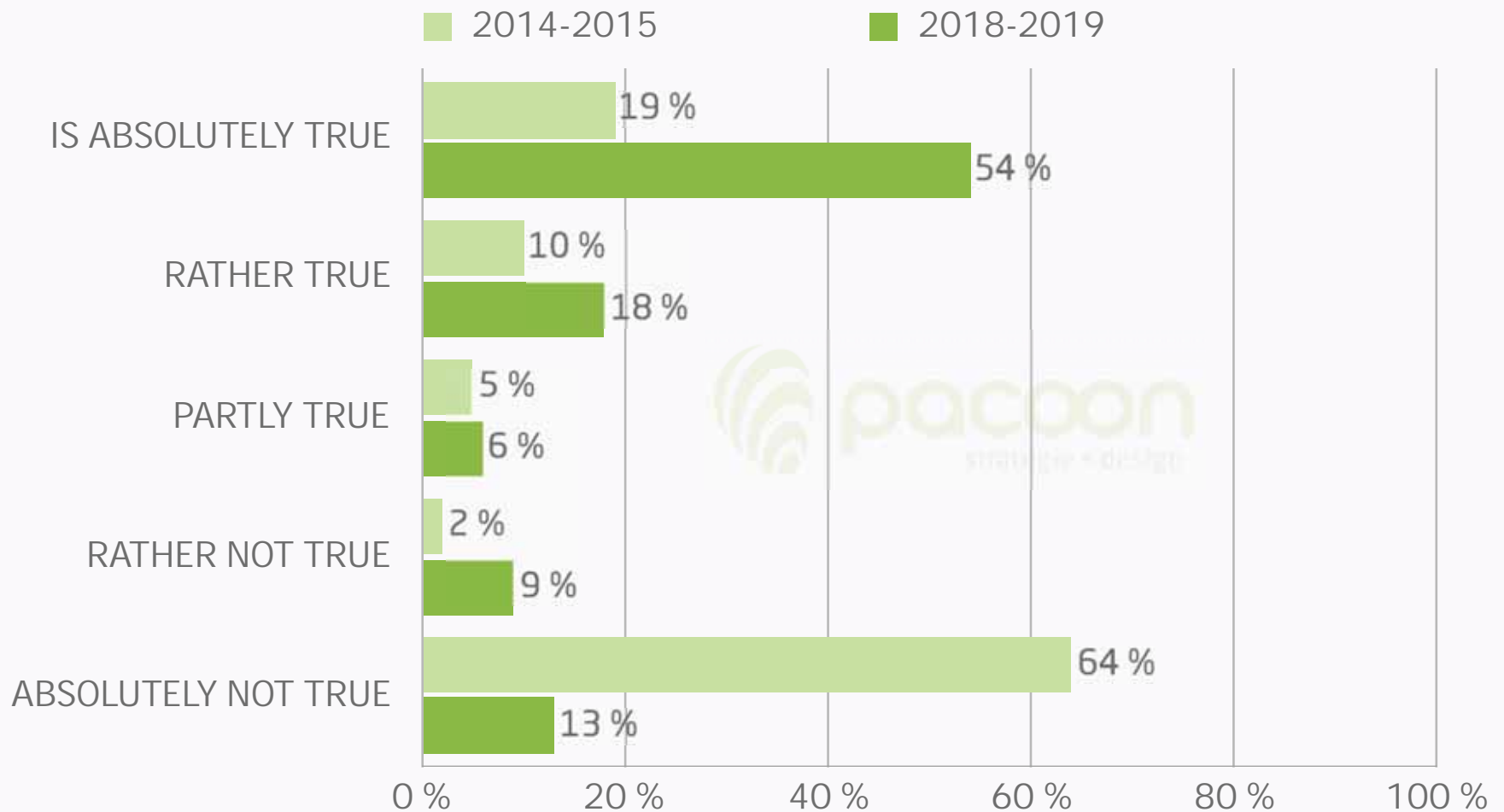


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# The subject of "waste" should be taught more at school, so that even the youngest can treat the environment with respect.

A clear change: today almost 3 out of 4 wish for education in children.



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We thank all  
participants for their  
support of the survey!



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We develop sales-  
promoting designs and  
clever solutions for more  
sustainability.

# Strategic Sustainable Successful

## We help you to strengthen your brand

**PACOON GmbH**  
strategy + design

**Peter Désilets**  
General Manager

Rosenheimer Str. 145a  
D-81671 München  
Fon: +49 89 890 45 75 81  
Mobile +49 173 202 303 6

[desilets@pacoon.de](mailto:desilets@pacoon.de)  
[www.pacoon.de](http://www.pacoon.de)

