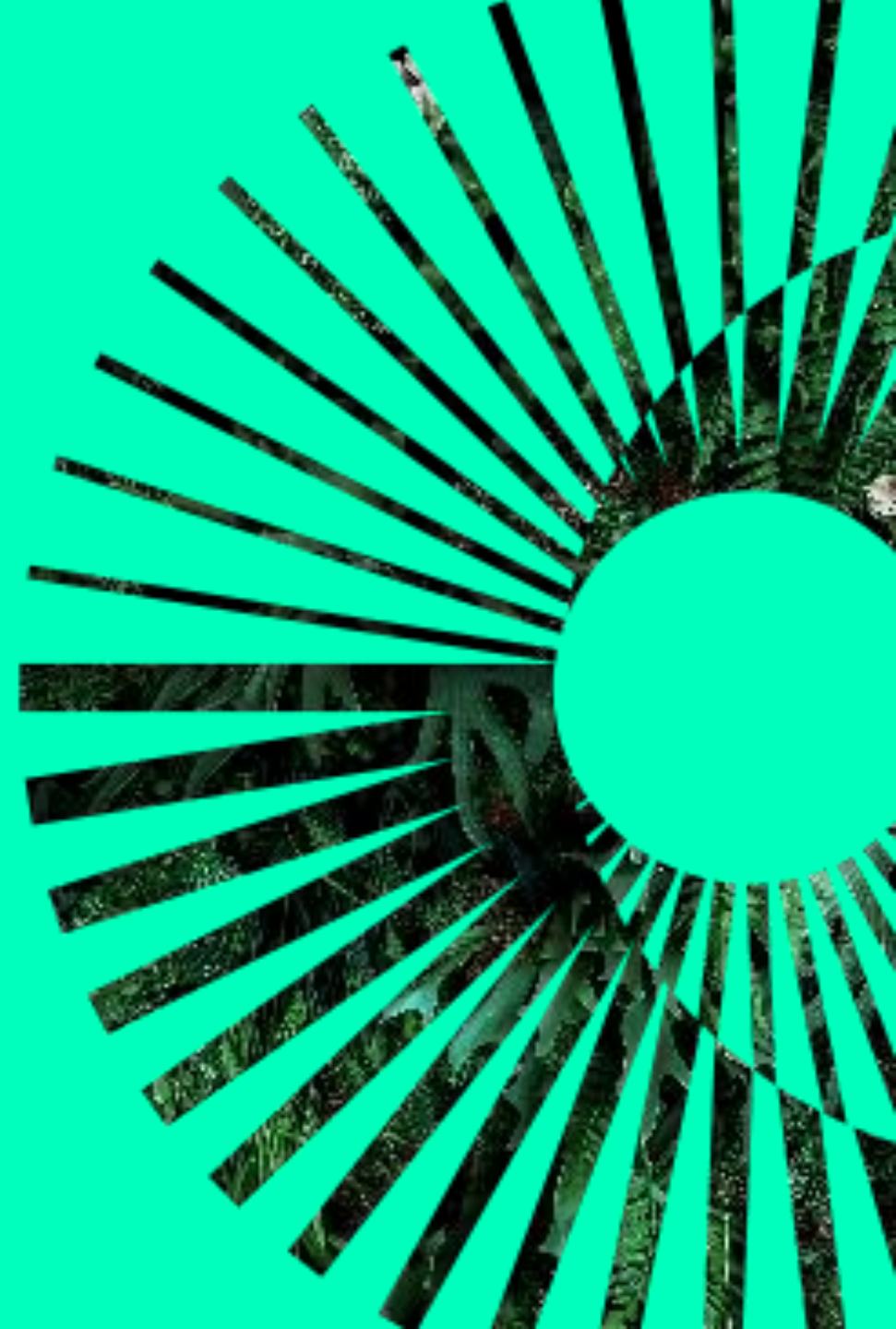


EPR through the consumer lens – and how you can make the most of it

FPI Conference

OCTOBER 23, 2025

We create a market advantage
for organizations that are
creating a sustainable future.



We start here...

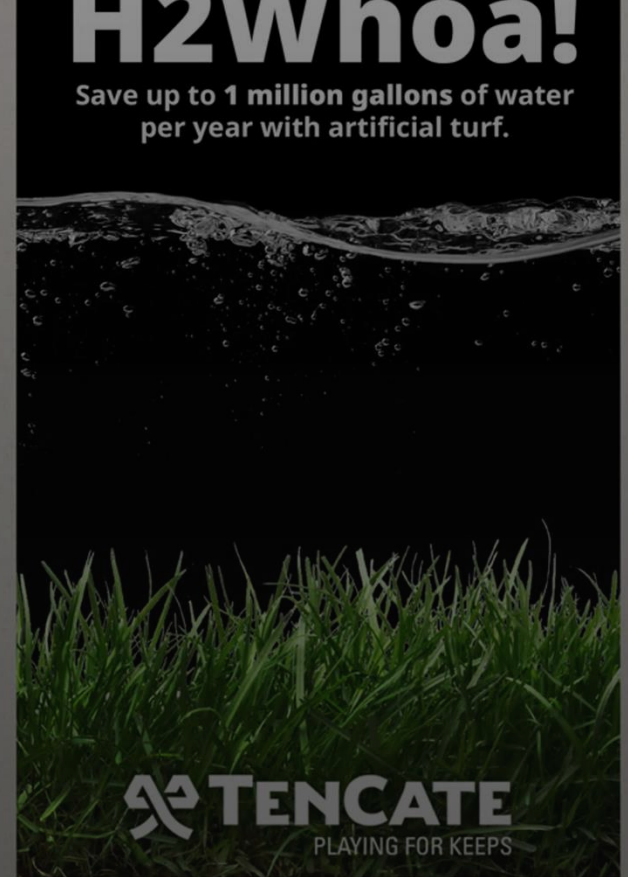
Energy Pulse®

Eco Pulse®





... and we end with communications strategies & campaigns that drive brand preference, propel sales, create behavior change, enhance investor outcomes and inspire employees

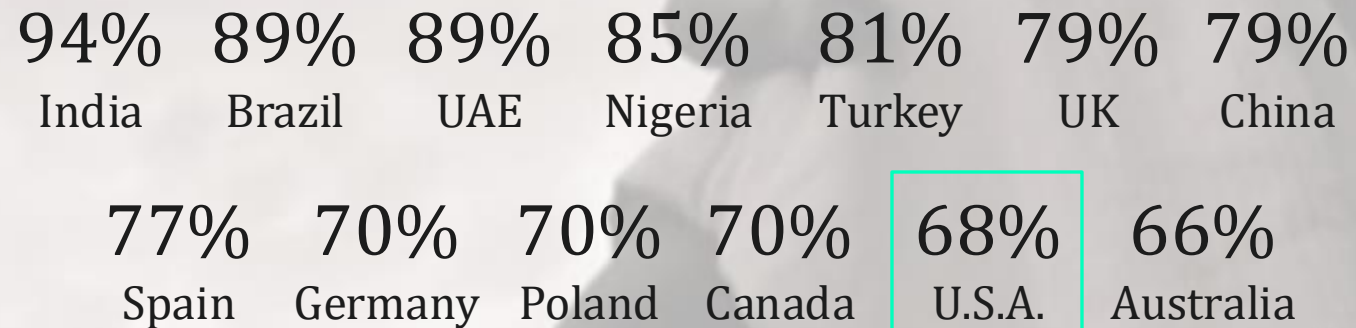


So, we're going to dig into consumer perceptions of
packaging and end of use,
Let's start with context:



85% agree

that global warming, or climate change, is occurring, and it is primarily caused by human activity



*Source: Global Eco Pulse® 2024 – Globally weighted by subregion
How much do you agree or disagree with the following statement: Global warming, or climate change, is occurring, and it is primarily caused by human activity. (n=7,140)*

670%

Of people we surveyed from around the globe say, they are very/extremely interested in hearing from companies about their efforts to reduce their environmental impact

80%

Of people we surveyed from around the globe say, knowing a company is a leader in reducing their environmental impact **improves** their opinion of that company.

6%

Of people we surveyed from around the globe say, knowing a company is a leader in reducing their environmental impact **decreases** their opinion of that company

Climate change isn't in the top three...but other environmental and economic issues are

TOP 3 CONCERNED ABOUT

 USA	Top 2 Box
Inflation	72%
Political unrest/war	64%
Plastics in oceans/rivers/streams	63%

 Canada	Top 2 Box
Inflation	74%
Water pollution	68%
Plastics in oceans/rivers/streams	67%

 Brazil	Top 2 Box
Water pollution	87%
Air pollution	85%
Deforestation/environmental destruction	84%

 United Kingdom	Top 2 Box
Inflation	66%
Water pollution	65%
Plastics in oceans/rivers/streams	65%

 Spain	Top 2 Box
Water pollution	69%
Plastics in oceans/rivers/streams	68%
Water shortages	67%

 Germany	Top 2 Box
Plastics in oceans/rivers/streams	74%
Political unrest/war	74%
Plastic waste	65%

 Poland	Top 2 Box
Inflation	70%
Water pollution	70%
Political unrest/war	70%

 UAE	Top 2 Box
Use of harmful chemicals	74%
Air pollution	74%
Water pollution	73%

 Nigeria	Top 2 Box
Food shortages	92%
Water pollution	90%
Use of harmful chemicals	89%

 China	Top 2 Box
Water pollution	61%
Use of harmful chemicals	58%
Deforestation/environmental destruction	53%

 India	Top 2 Box
Air pollution	91%
Water pollution	89%
Plastic waste	88%

 Australia	Top 2 Box
Inflation	69%
Plastics in oceans/rivers/streams	61%
Plastic waste	58%

 Turkey	Top 2 Box
Water pollution	82%
Inflation	82%
Use of harmful chemicals	81%

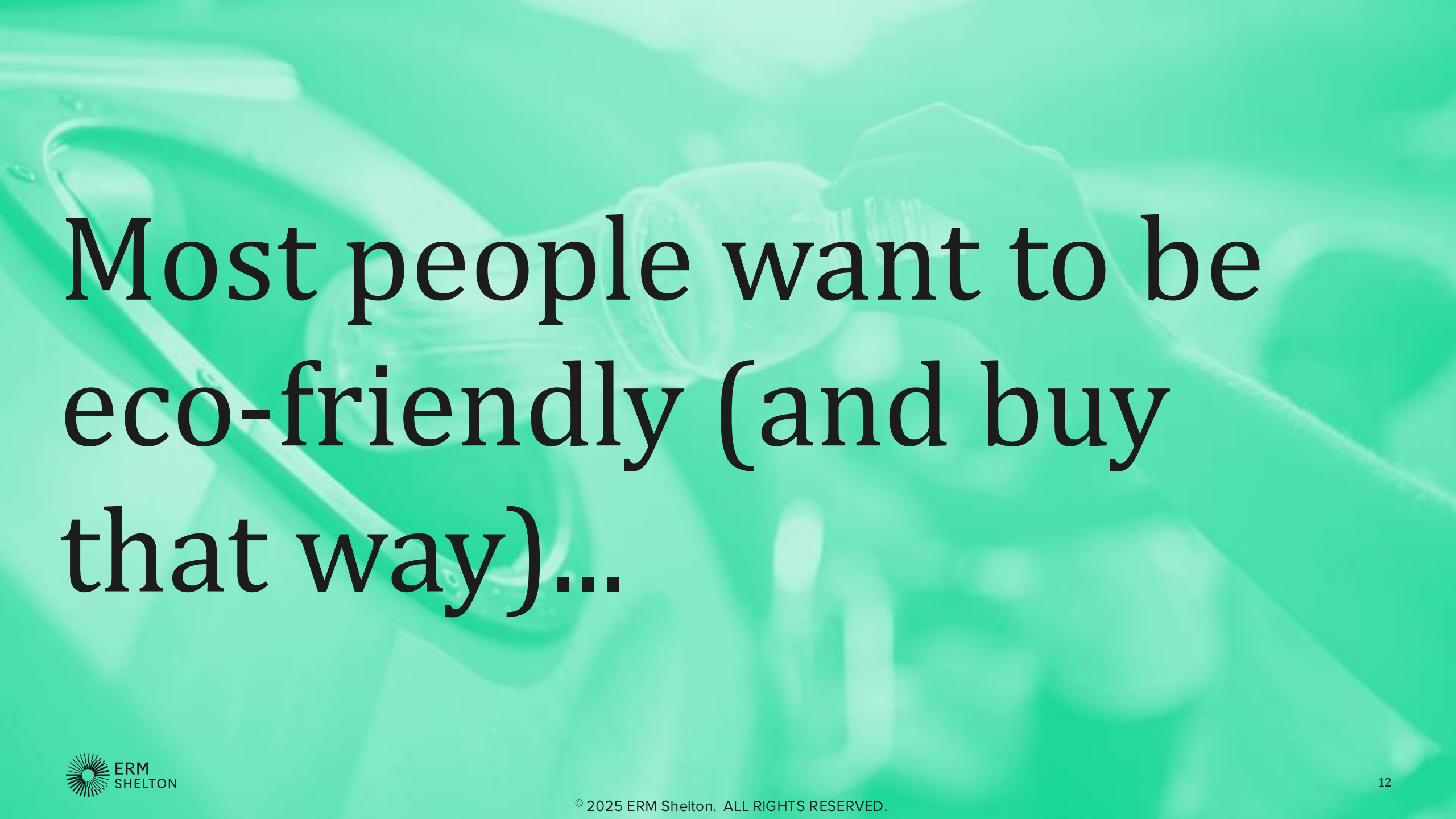


86%

of people in America are somewhat to extremely **concerned about the packaging** they use ending up in the environment

Source: ERM Shelton Circularity 2025 – How concerned are you about the packaging you use (food, personal care, etc.) ending up in the environment? (n=1,001) Somewhat, very, and extremely concerned

The truth is: we're
concerned about a lot.



Most people want to be
eco-friendly (and buy
that way)...



75%

want to be seen as someone who buys & uses eco-friendly products

89%
India

81%
Nigeria

78%
UAE

76%
Turkey

73%
Brazil

73%
China

52%
Canada

51%
Germany

49%
Poland

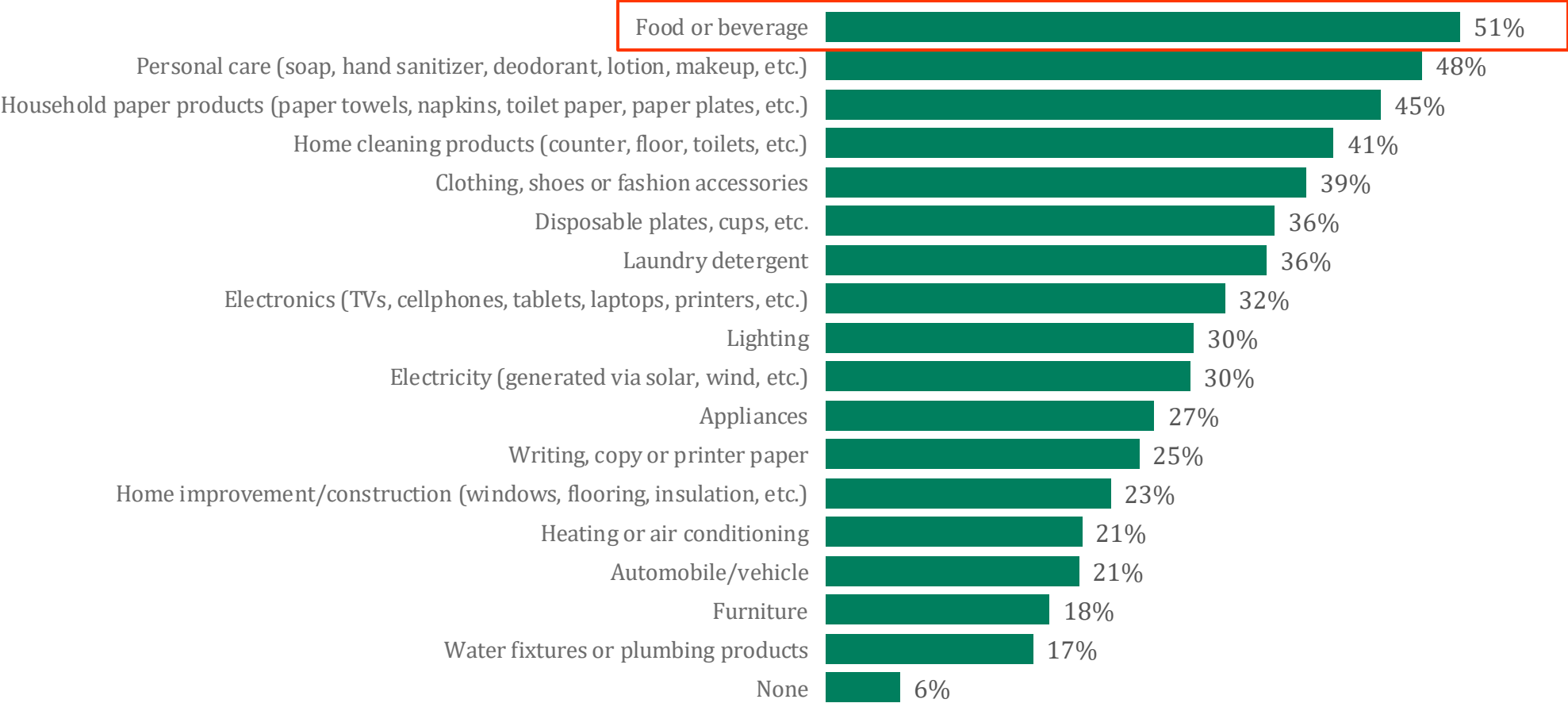
49%
UK

46%
U.S.A.

45%
Spain

43%
Australia

Please tell us if you've consciously purchased greener (more energy-efficient, natural, eco-friendly, etc.) products in any of the following product categories.





44%

can name a product or brand they've purchased – or not purchased – because of the environmental or social record of the manufacturer

*Source: Global Eco Pulse® 2024 – Globally weighted by subregion
-Have you ever chosen one brand or product over another or stopped purchasing a brand or product based on the environmental or social record of its manufacturer? Name the brand. (n=7,140)*



32%

of Americans can name a product or brand they've purchased – or not purchased – because of the environmental or social record of the manufacturer

Source: Global Eco Pulse® 2024

-Have you ever chosen one brand or product over another or stopped purchasing a brand or product based on the environmental or social record of its manufacturer? Name the brand. (USA n=2,063)

Please tell us what brand/product you've chosen to purchase because of the environmental or social record of its manufacturer



Source: Global Eco Pulse® 2024 – Globally weighted by subregion

(US n=633) *Brands shown had 2 or more mentions

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Please tell us what brand/product you've stopped purchasing because of the environmental or social record of its manufacturer.



Source: Global Eco Pulse® 2024 – Globally weighted by subregion

(US n=665) *Brands shown had 2 or more mentions

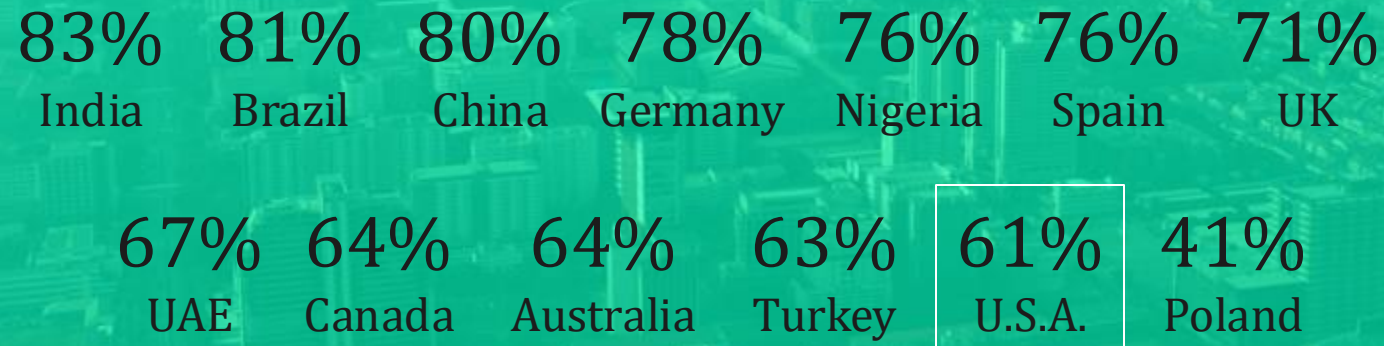
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At the end of the day,
they're really looking to
companies to solve many
of our biggest problems.



76%

hold companies strongly/very strongly responsible for making changes that positively impact the environment

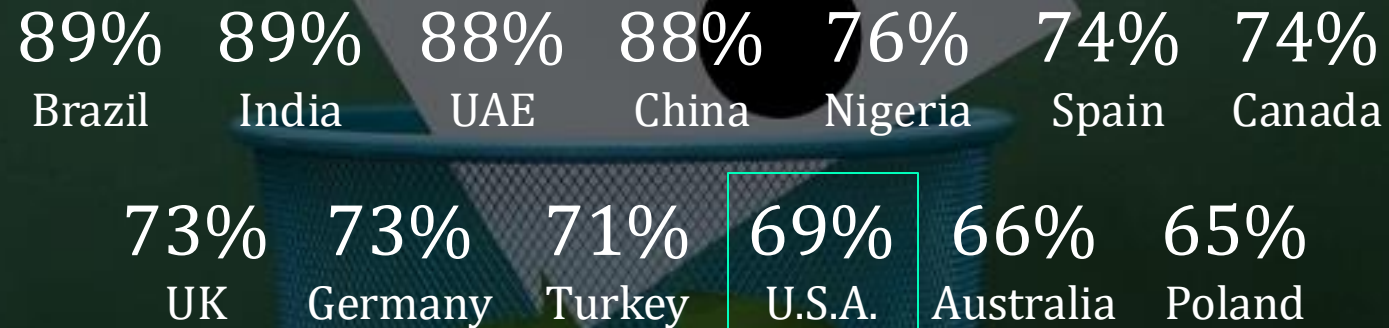


*Source: Global Eco Pulse® 2024 – Globally weighted by subregion
How responsible do you feel each of the following are to change practices to positively impact the environment? (n=7,140)*



83% believe

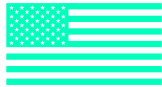
companies should have some to very much responsibility for the end-of-life disposal of their products



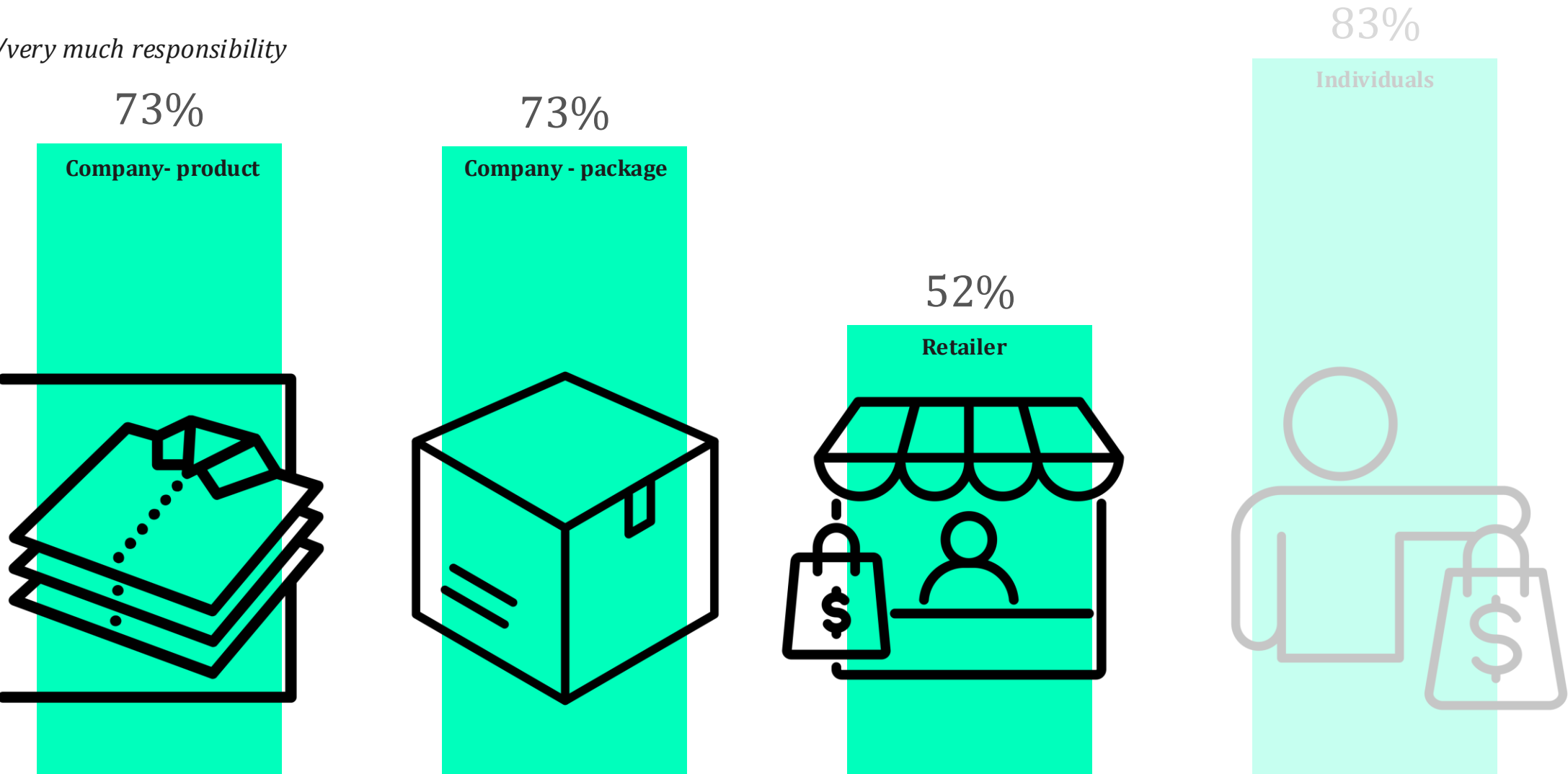
Source: Global Eco Pulse® 2024 – Globally weighted by subregion
How much responsibility do you think a company has for the end-of-life disposal of the products it manufactures? (n= 7,140)

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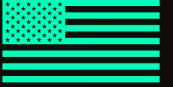
73% believe both the company who made the product and the company who made the package hold responsibility for proper disposal, and half even believe the retailer who sold it bears responsibility



% some/very much responsibility



And their expectations are not being met



16%

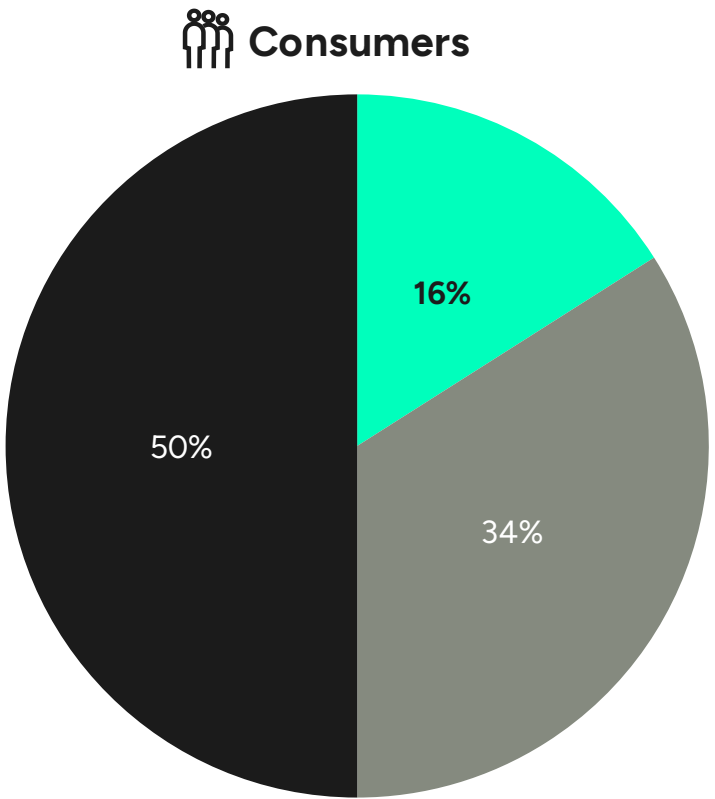
think companies and manufacturers are doing **very or extremely well** at taking steps to ensure their packaging waste does not end up in the environment

50%

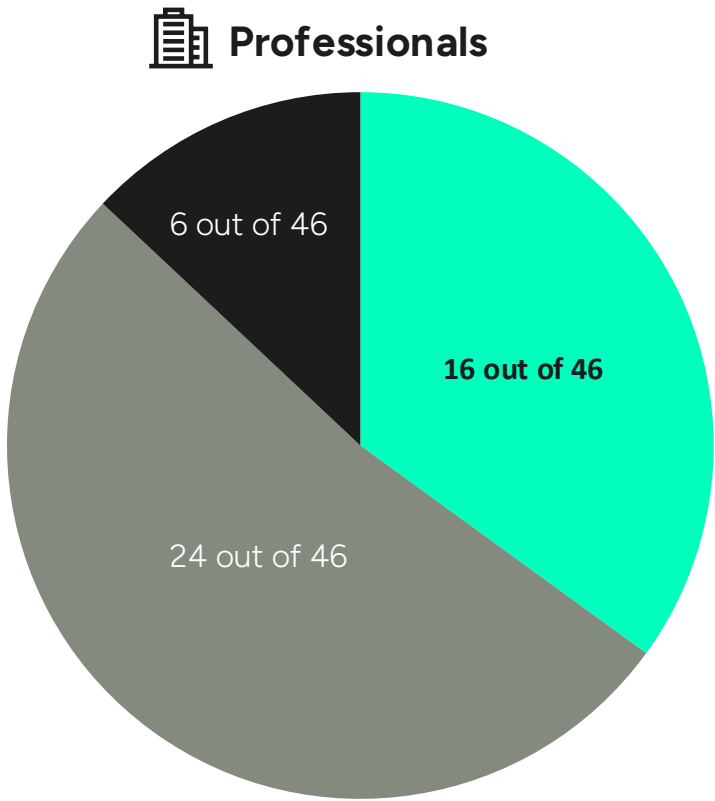
think they're **not doing well**

When it comes to ensuring packaging waste doesn't wind up in the environment:

How consumers think companies are doing



How companies think they're doing



OK, so people want companies to better handle
packaging end of use:
How do they get the message?

Cue #1: What the package says



The top 3 ways U.S. consumers decide a product is “green” all comes down to what’s on the packaging.

**Details on the
package**

42%

e.g., reading the back of the packaging,
reviewing the ingredients, etc.

The label says so

35%

e.g., trusting the claims on packaging
without reviewing the details and
fine-print

**Certification from an
independent third-
party**

32%

e.g., trusting badges or logos on the
packaging from certification
authorities



*ERM Shelton, Eco Pulse® 2024 (n=2,003)
You've likely been seeing a lot of products that are promoted as green in stores these days. But
how do you know that a product is green?*

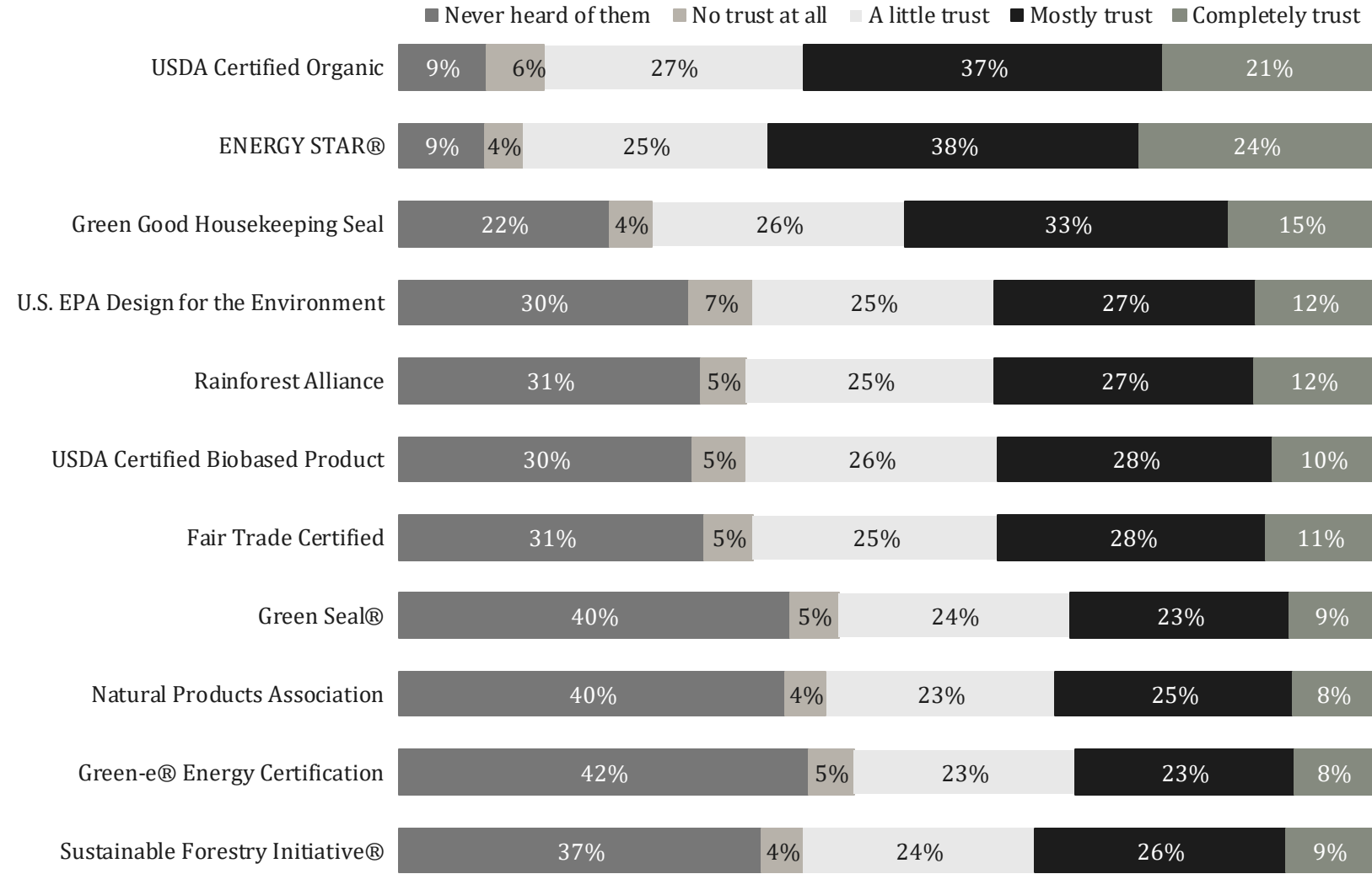
Here are some good examples



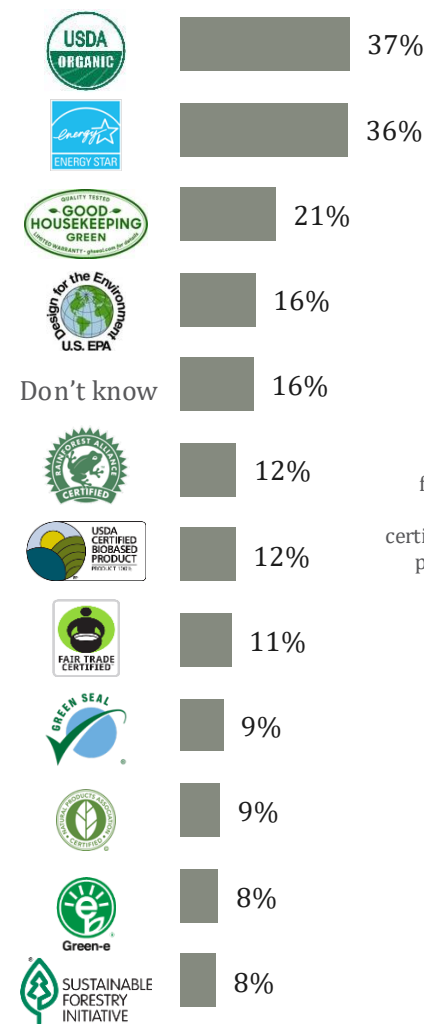
In the U.S., ENERGY STAR® and USDA Certified Organic are also the most trusted [1 of 2]



Level of Trust



Best Green Third-Party Certifier

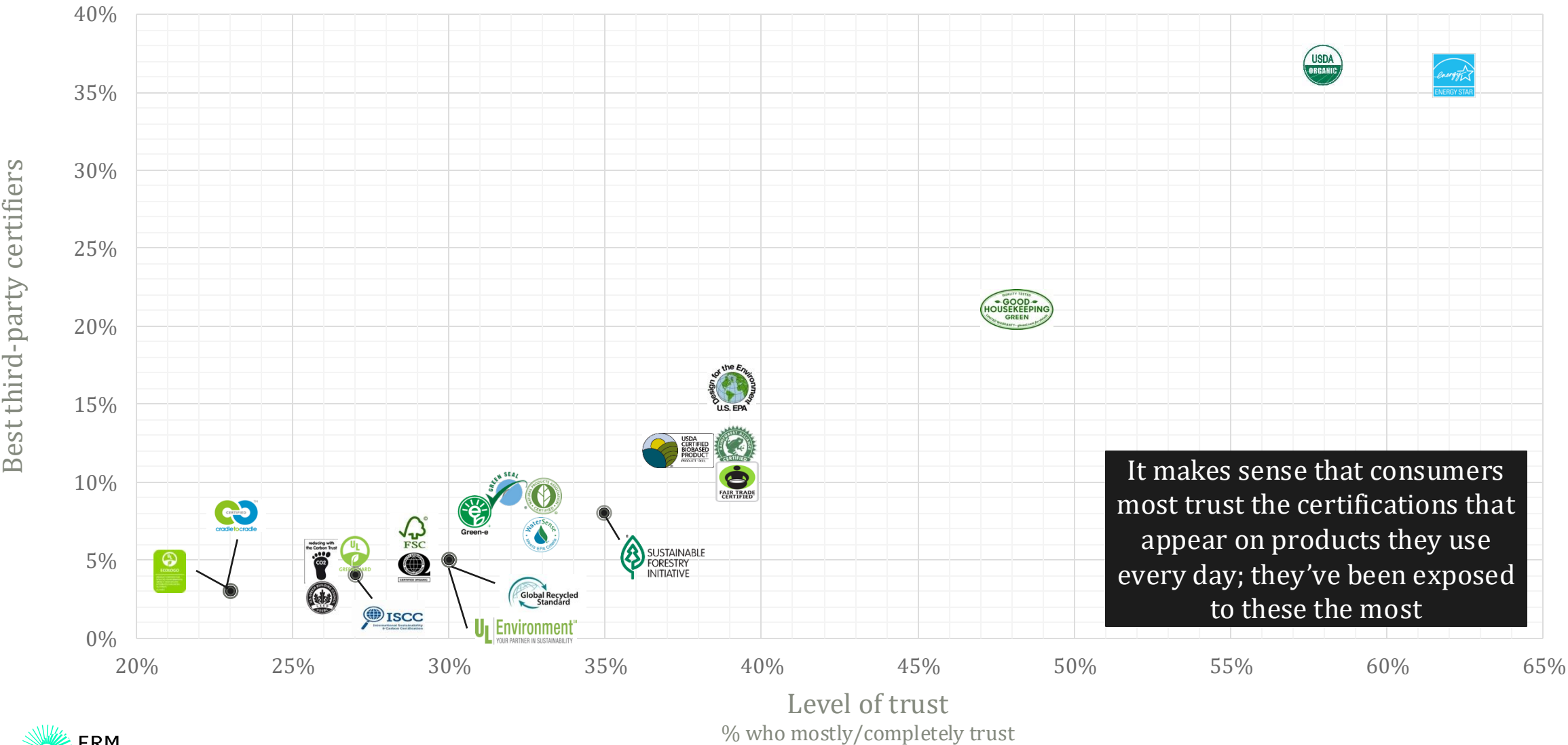


Which of the following are the best third-party certifiers to ensure a product is green?





People generally know and trust the most ubiquitous third-party certifications.

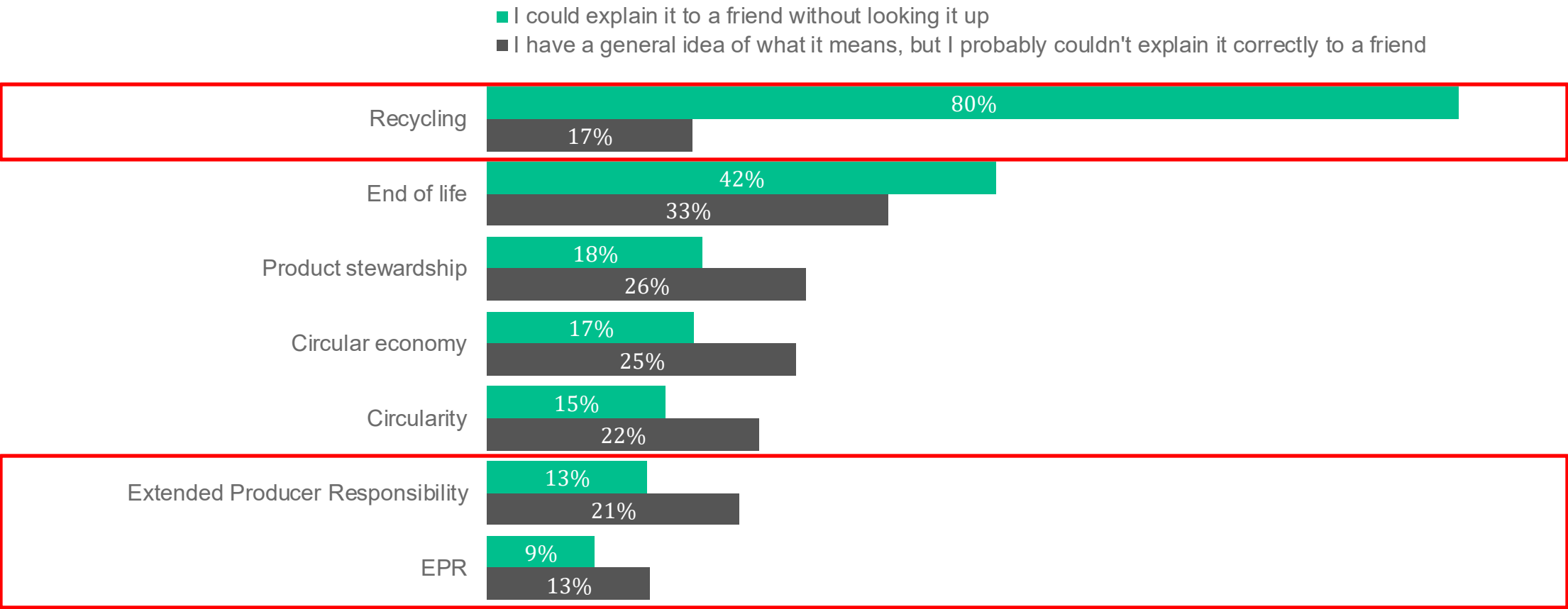


Cue #2: Packaging make-up and end of life





Consumers report **very high understanding of “recycling,”** but very few other EOL terms



Recycling helps the environment **97%** (overall) think

99%	99%	99%	99%	98%	97%
UAE	Brazil	India	Poland	Nigeria	Spain
96%	95%	94%	94%	94%	94%
Australia	UK	Canada	China	Germany	U.S.A.

*Source: Global Eco Pulse® 2023 – Globally weighted by subregion
Do you think recycling helps protect the environment? (n=5,497)*

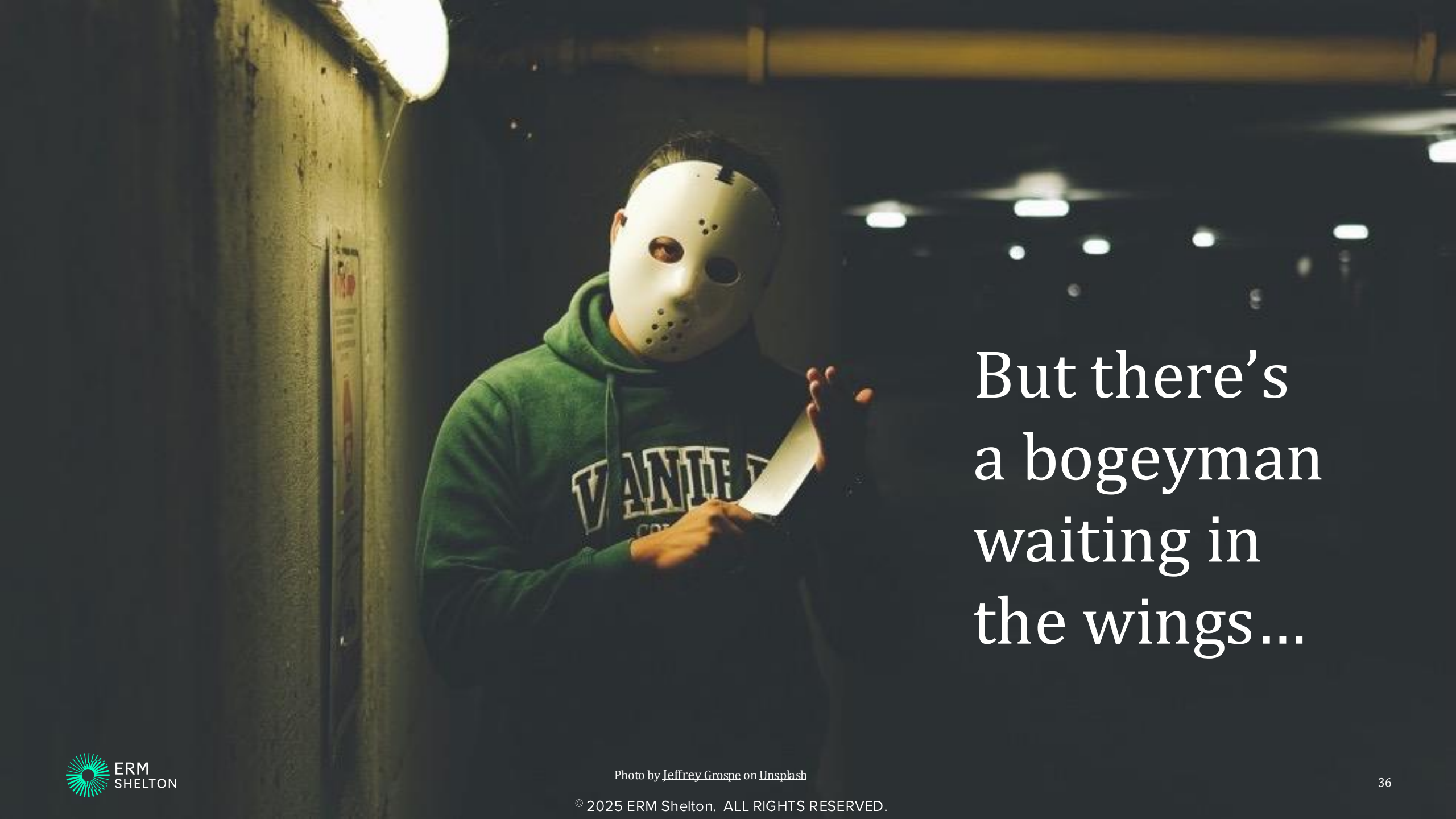
91% agree that recycling is the bare minimum we can do for the environment

95%	94%	92%	92%	89%	88%
China	India	Poland	Brazil	Spain	Germany
88%	87%	86%	85%	84%	83%
Australia	UK	Canada	UAE	U.S.A.	Nigeria

89% (overall) say,

“recycling makes me feel better about the amount of things I purchase or consume”

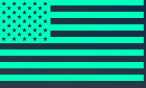
95%	94%	89%	89%	86%	84%
India	China	Brazil	UAE	Poland	Spain
80%	80%	78%	76%	74%	72%
Nigeria	Canada	Australia	U.S.A.	Germany	UK



But there's
a bogeyman
waiting in
the wings...

30% aren't confident that what they toss in the recycling bin is actually recycled

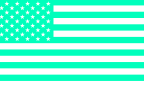
53%	43%	40%	37%	34%	32%
Spain	Germany	Nigeria	Australia	Brazil	Poland
32%	32%	28%	18%	14%	7%
Canada	U.S.A.	U.K.	UAE	India	China



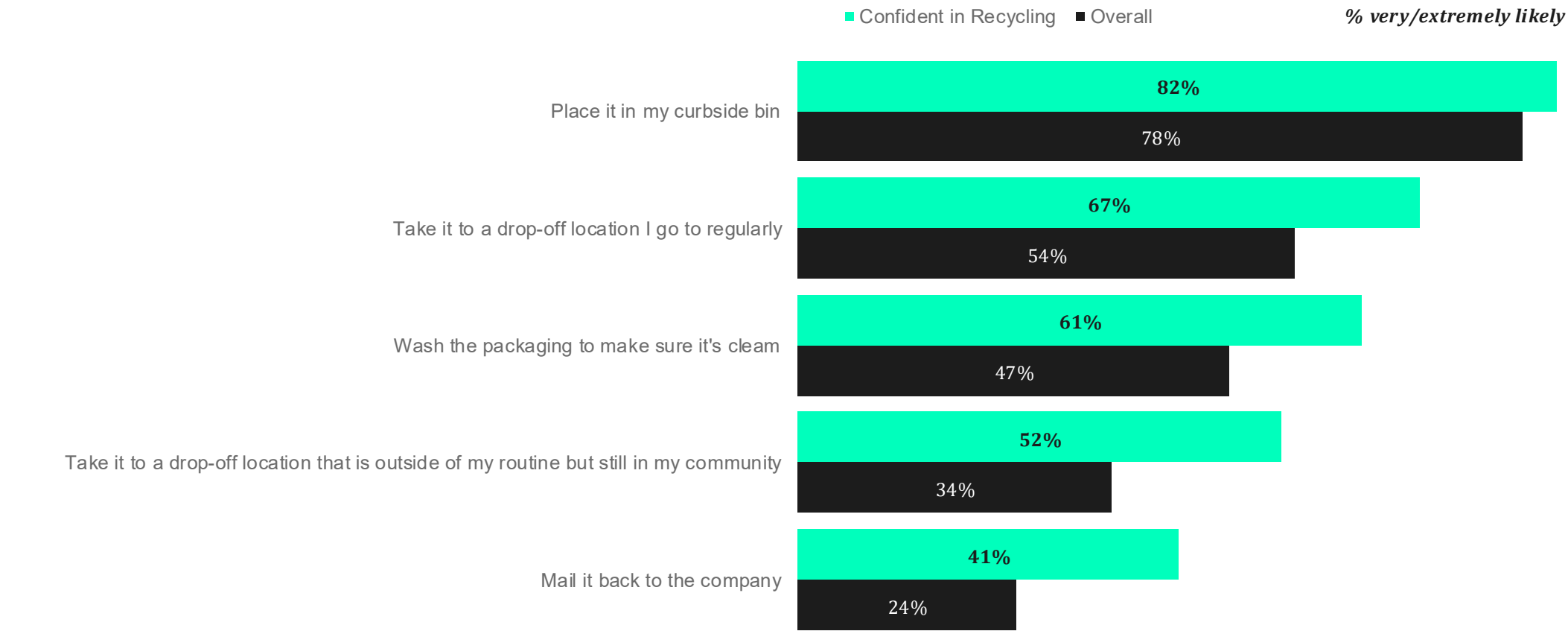
Only

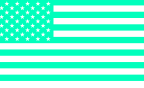
29%

of consumers are very or extremely confident the things they
toss in the recycling bin are **actually getting recycled**

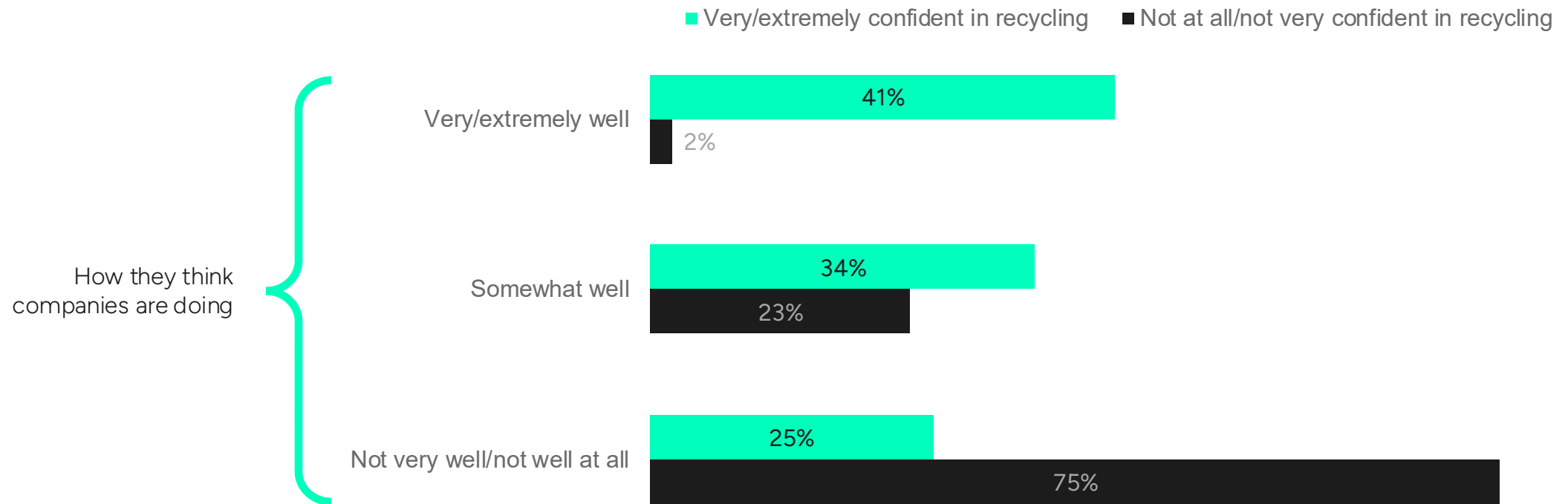


But those who are confident in recycling are more likely to do all these actions





And those who are confident in recycling **think companies are doing a much better job** at dealing with waste than those who aren't confident





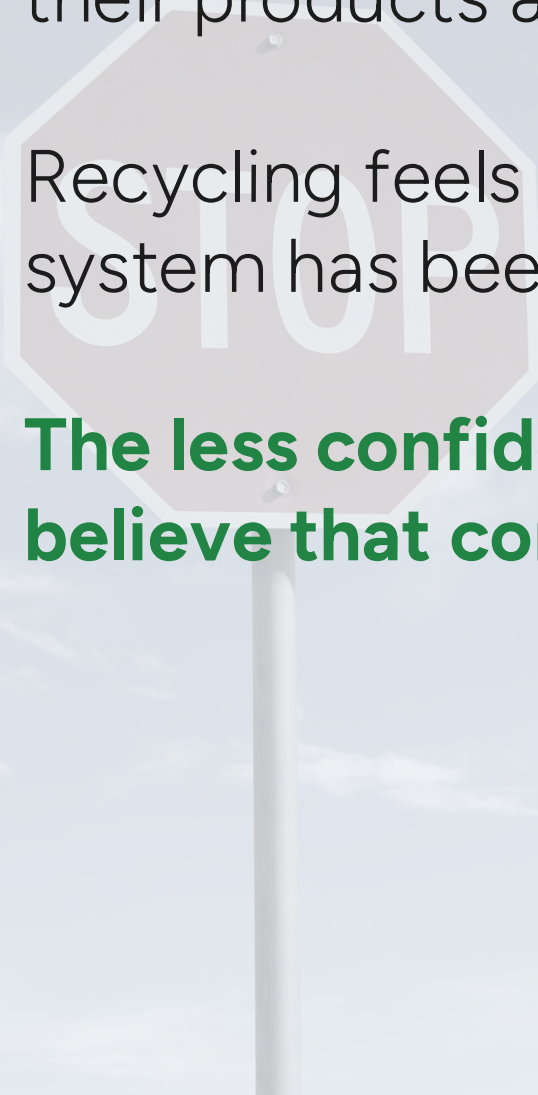
Let's **recap** for a second:

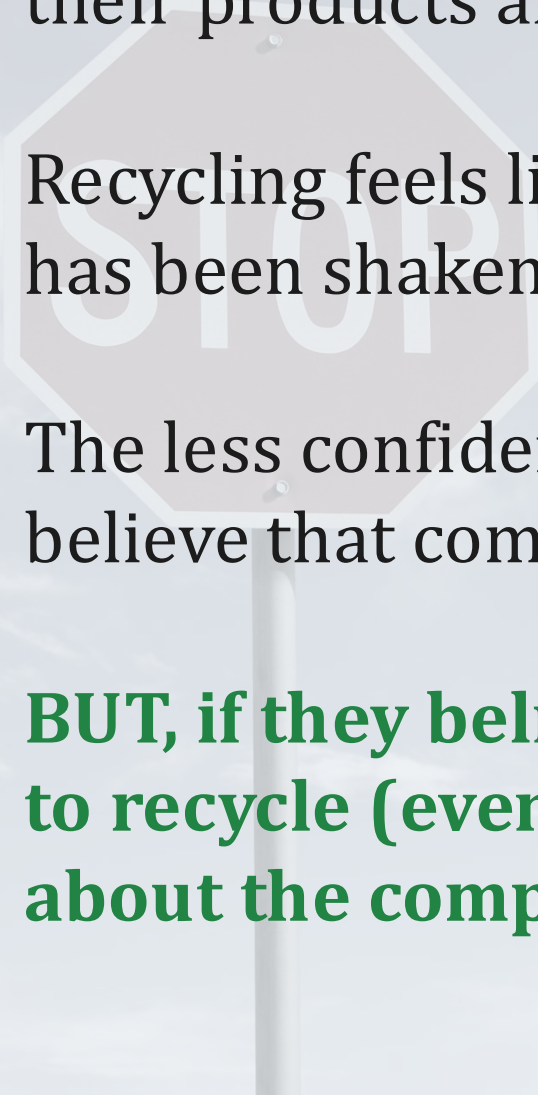
1. **They expect companies to take care of the proper disposal of their products and packages.**



1. They expect companies to take care of the proper disposal of their products and packages.
2. **Recycling feels like a good option...but their faith in the system has been shaken.**

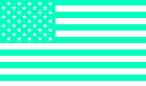


- 
1. They expect companies to take care of the proper disposal of their products and packages.
 2. Recycling feels like a good option...but their faith in the system has been shaken.
 3. **The less confident they are that recycling works, the less they believe that companies are doing a good job with item #1.**

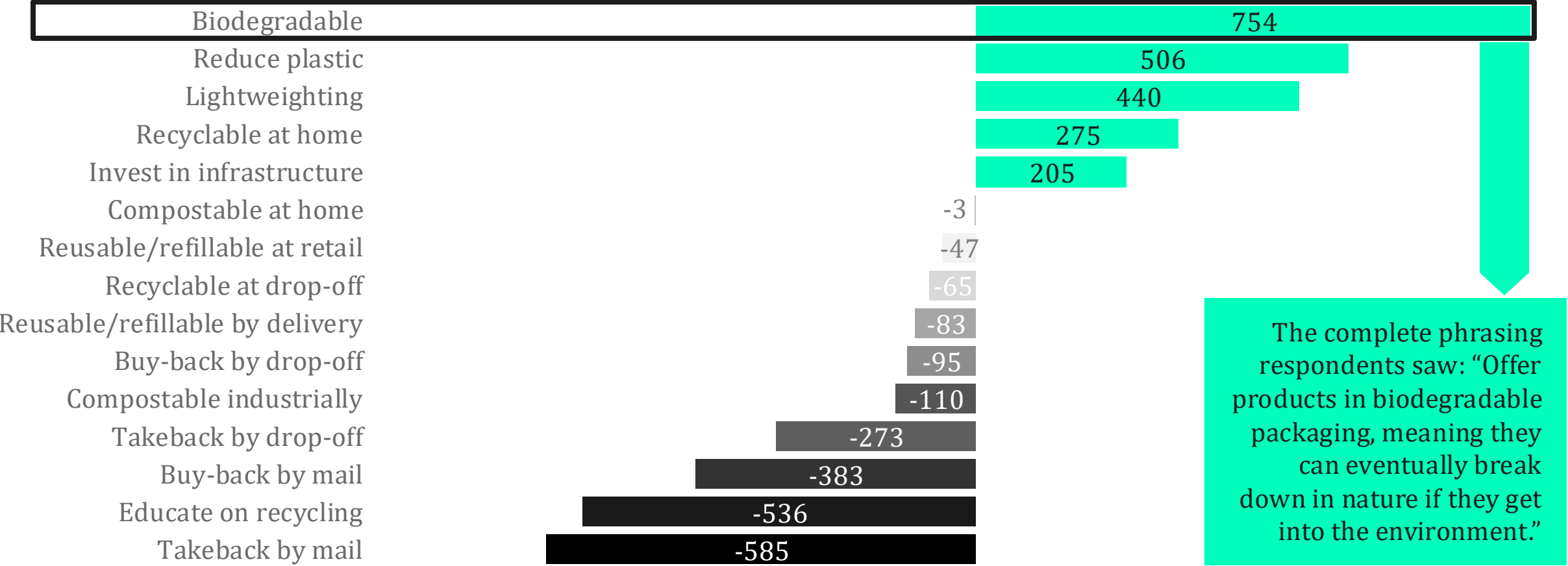
- 
1. They expect companies to take care of the proper disposal of their products and packages.
 2. Recycling feels like a good option...but their faith in the system has been shaken.
 3. The less confident they are that recycling works, the less they believe that companies are doing a good job with item #1.
 4. **BUT, if they believe recycling works, they are more likely to recycle (even when it's hard) and more likely to feel good about the companies they buy from.**



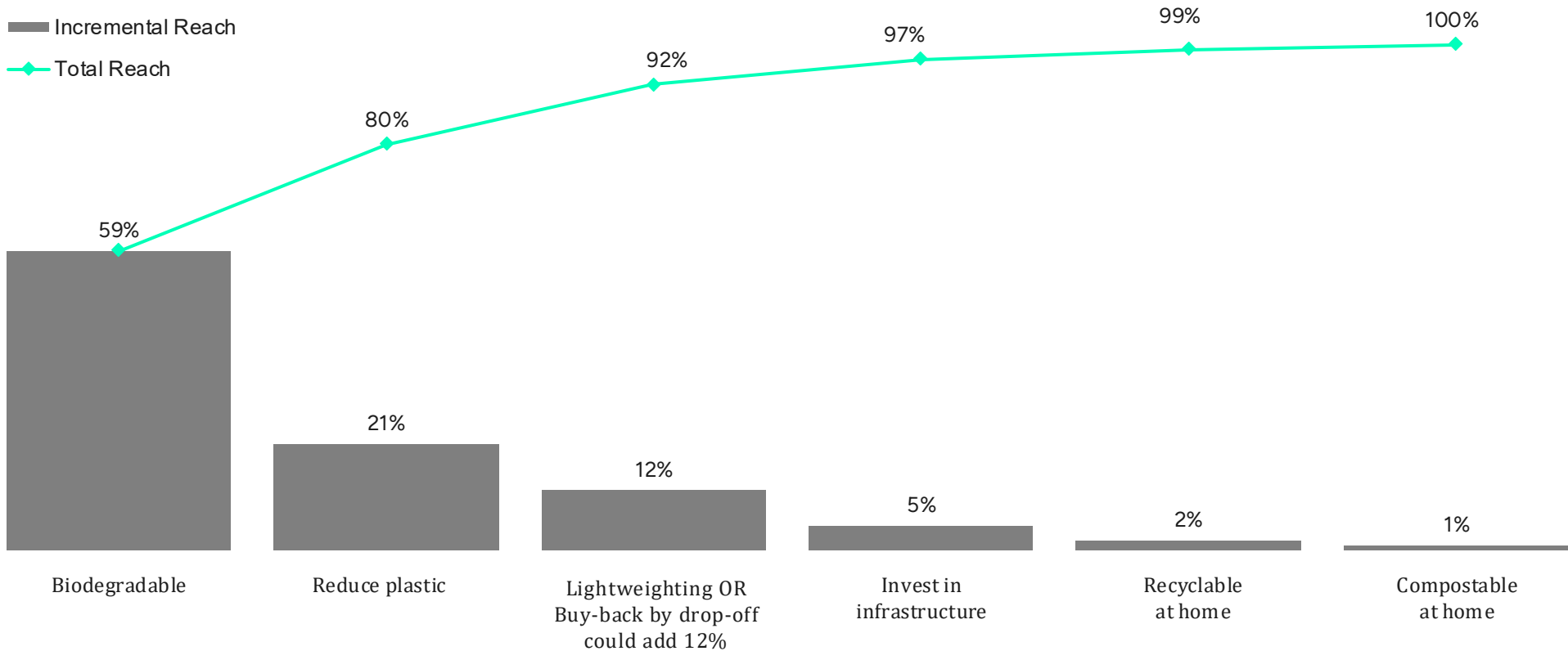
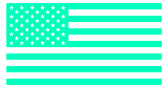
Even more than recyclability, there's
one packaging end of life option
consumers really wish companies
were pursuing:



Biodegradability is the EOL option that MOST drives favorable opinions of a company.

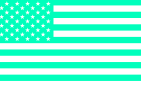


Here's another way to look at it:



The following features provide no additional reach:

- Takeback by drop-off
- Takeback by mail
- Reusable/refillable at retail
- Compostable industrially
- Reusable/recyclable by delivery
- Recyclable at drop-off
- Buy-back by mail
- Educate on recycling



You can see their angst coming through in their *unaided* answers to what companies should be doing to take responsibility for the disposal of the packaging they manufacture.

Consumers clearly showed a **hunger for guidance and help with packaging end of use**

“Make it easy, help us, educate us.”



Source: ERM Shelton Circularity 2025 – If a company is going to take responsibility for the disposal of the packaging it manufactures, what do you think that means they should be doing? (n=1,001)

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They want companies and retailers to figure out how to **make disposal easy and environmentally friendly**, and to help consumers play their parts successfully as well

“Consumer should be able to give packaging back to retailer and manufacturers should pick it up and re-use or recycle the packaging”

“Return it back to the company or store it was bought from”

“Being charged for the waste they produce or there should be requirements for using the most eco friendly packaging possible”

“Investing in more efficient recycling centers where products are sold”

“Ensure it’s safe for the environment should the end user not dispose of it properly, make it as easy as possible to dispose of and recycle”

Also:

Recycled content claims offer a huge opportunity as well -- specifically, narrative claims, because they let consumers know their purchase can have a tangible, real-world impact – **good has already happened** – even before they do their part of recycling.

Survey details

- The GreenBlue 2025 online survey was fielded from 2/7 – 2/18, 2025
- Main sample data (n=2,556)
- The overall margin of error is +/- 1.9%



Here's a quick case study to show you
how some of these concepts work in the
real world...



ERM Shelton partnered with the Can Manufacturers Institute and canned food brands to tell the infinite recyclability story of **the steel food can.**



Prior to our campaign, only 3% believed that steel was the most likely material to get processed by a recycling center to become a new product.

But in reality, 75% of all steel ever produced is still in use today, and at 58%, steel food cans have the highest recycling rate of any food packaging.

Source: Recycling Pulse 2022

Based on what you know, which one of these materials do you believe is most likely to get processed by a recycling center so it can become a new product? (Choose only one) (n=1,001)

Canned Good was a three-year campaign, running from 2022 to 2024. We wanted to do three things:

1.

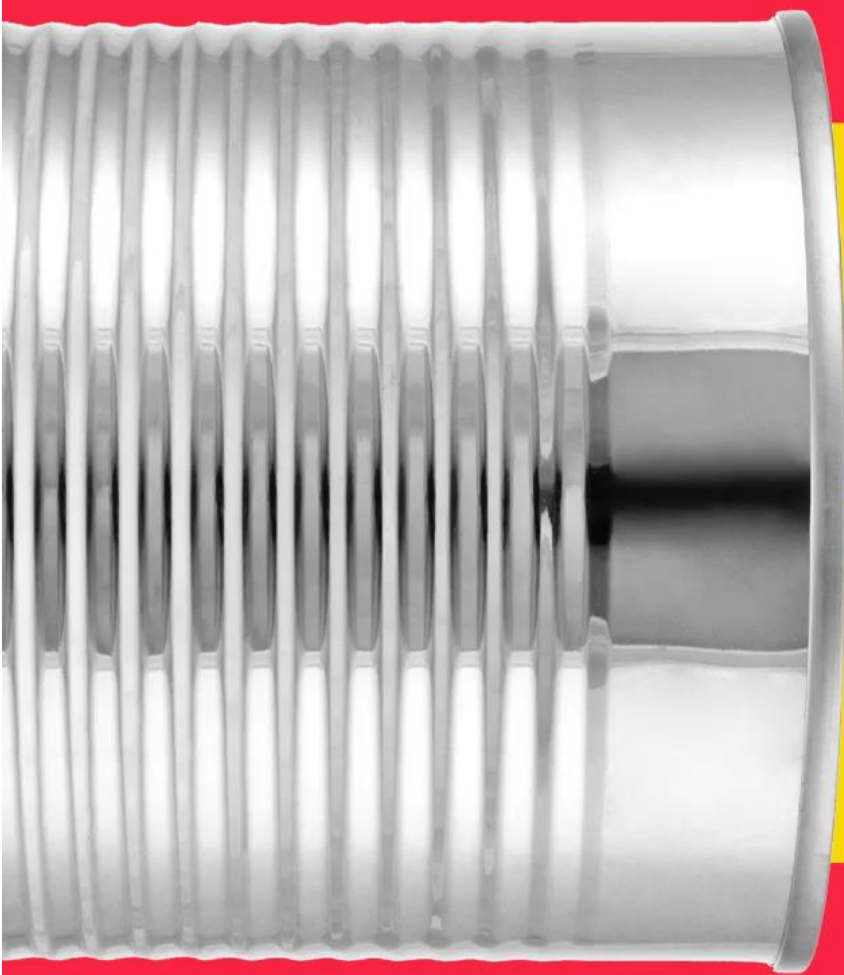
Increase awareness of the infinite recyclability of the steel food can.

2.

Utilize retail and digital media to drive preference.

3.

Increase canned food sales based on recyclability messaging.



LOO

It worked!

12% lift

in favorability of
the steel food can

16% lift

in preference for
steel cans

26% lift

in empowerment

11% lift

in confidence that steel
food cans actually get
recycled

14-24% lift

in belief in the recyclability of
other materials

And ...

Sales went up!

	First Activation	Second Activation	Third Activation
Retailer 1	+13% in store +41% online	+6% in store & online	+12% in store +36% online
Retailer 2	22-52% in store		
Retailer 3	75% sales lift	+75% sales lift	
Retailer 4	5% in store		
Retailer 5	129% sales lift		
Retailer 6	317% sales lift		

Source:

Retailer 1: Internal consumption data from April 2022, April-May 2023, and September-October 2023 activations

Retailer 2: IRI data from April 2022 activation

Retailer 3: IRI data from October-November 2022 and September-October 2023 activations

Retailer 4: Internal consumption data from September-October 2023 activation

Retailer 5: Internal consumption data from September-October 2023 activation

Retailer 6: Internal consumption data from February 2024 activation

All Retailers: Combined Canned Good Coalition CPG Partner's unit sales lift during activation period vs. same period the year before

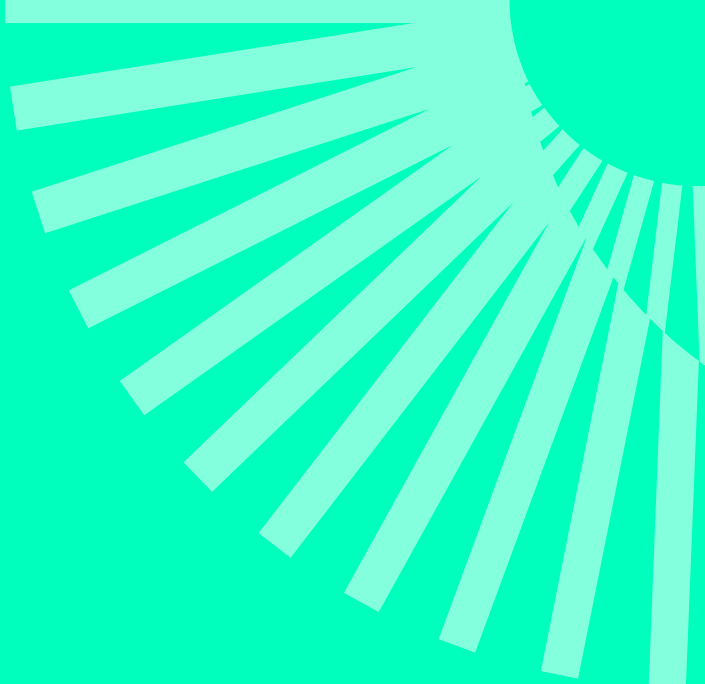
Plus ...

**54% of those familiar
with Canned Good**

were willing to pay \$0.45 more per can after learning
about steel cans' recycling attributes.

Source: Canned Good Research (2024)

Economic conditions are causing the price of goods to go up. If the price of a typical canned food increase from \$1.48 to \$1.93, would you still buy your typical canned foods even with this kind of increase? n=782



Let's recap!

Recap

- Consumers are concerned about many environmental issues
- They want companies to solve them...and they'll reward you with their purchase when they believe you're part of the solution.
- They especially hold companies accountable for solving the end of life/packaging waste problem. And they think companies need to do a better job.
- They're looking for signals on-pack:
 - Specifics on pack, including third-party certifications
 - Recyclability – but their faith has been shaken
 - Biodegradability
 - Narrative claims on recycled content
- So don't shy away! Innovate your materials and get your claims on pack – and start driving preference and purchase!



Thank you! Questions?

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