

PACKAGING AS SEEN BY THE FRENCH AND THE ALLFORPACK COMMUNITY IN 2025

In the face of rapidly changing economic, environmental and societal concerns, consumers' attitudes towards packaging have seen a radical transformation. This shift is forcing manufacturers to rethink their practices, reconcile innovation with sustainability and adapt to an ever-changing regulatory framework. In this dynamic landscape, ALLFORPACK EMBALLAGE PARIS, the European multi-specialist exhibition dedicated to the changing world of packaging, plays a leading role.

A true bellwether for the sector, the tradeshow highlights the most virtuous initiatives, deciphers new obligations and anticipates the trends that are reshaping the sector. To do so, each year the exhibition surveys its community (packaging suppliers and user industries) along with consumers, through two surveys conducted to establish a 'health report' for packaging in France. This report confirms the increasingly strong impact of environmental factors on consumer choices, with consumers still seeking alternatives, and highlights the initiatives of the ALLFORPACK EMBALLAGE PARIS community to best respond to environmental, economic and regulatory challenges.

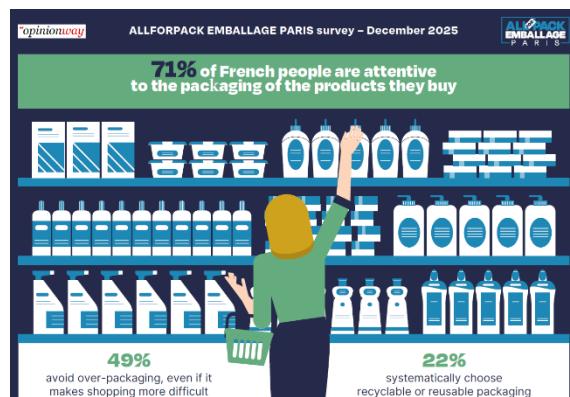
ALLFORPACK EMBALLAGE PARIS/OPINIONWAY SURVEY (NOVEMBER 2025) THE ENVIRONMENTAL IMPACT OF PRODUCT PACKAGING

- **The French show a keen interest in the sustainability of packaging**, with many going so far as to change their purchasing habits.
- **Price remains a key barrier to purchasing better-packaged products, but it is not the only obstacle**. The French widely express their difficulty in distinguishing between what is truly environmentally friendly and what is not, and remain unconvinced by the credibility of environmental claims.
- **Respondents primarily identified large companies and retailers as the players who should take the lead in moving forward and driving the transition to more sustainable packaging**. The survey results reflect a positive trend. Most French people are attentive to the packaging of the products they buy. However, when it comes to packaging, as with consumption in general, attitudes towards aesthetics, functionality and environmental impact vary according to age.

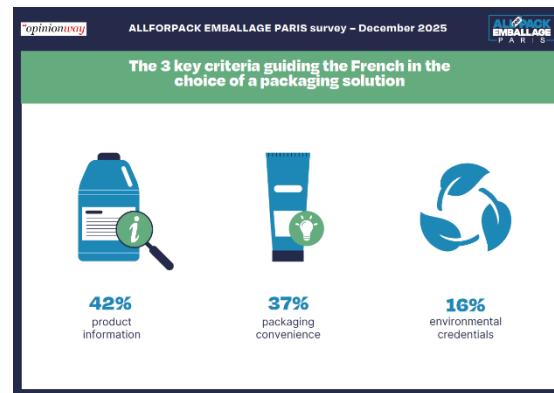
1. FRENCH PEOPLE IN SEARCH OF MORE VIRTUOUS PACKAGING

French people are generally attentive to the packaging of the products they buy: **71% of those surveyed say they are careful about the packaging of the products they buy**. More specifically, 1 in 2 French people (49%) say they try to avoid over-packaged products, even if this makes shopping more difficult, while 1 in 5 French people (22%) assert that they only choose recyclable or reusable packaging.

In detail, French people pay attention to multiple aspects of packaging. They are often attentive to the sustainability of the packaging (32%), where it is manufactured (33%) and what it is made of (31%).



These factors are cited just behind the fundamental aspects of product information (42%) and packaging convenience (37%). Environmental credentials are cited by around 16% of French consumers, indicating that consumers often prefer to judge the sustainability of packaging for themselves rather than relying on labels. Younger consumers are more likely to report having purchased a product because of its environmentally friendly packaging. Among 18-24 year olds, more than 6 out of 10 (64%) say they have done so, and among 25-34 year olds, the figure rises to 7 out of 10 (70%). Among those under 35, more than half of respondents say they are willing to pay more for more environmentally friendly packaging (54%).



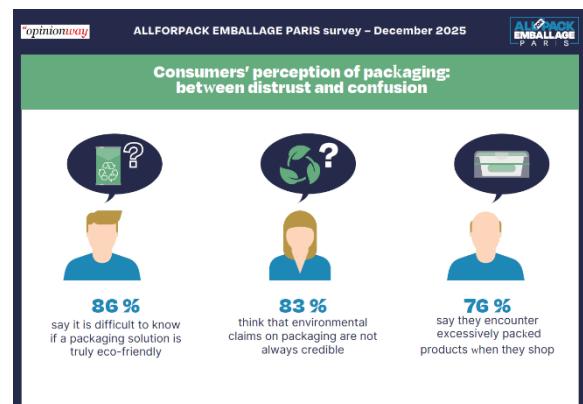
These concerns about the environmental impact of packaging are reflected in the consumption choices of respondents, who can easily be persuaded to buy a product because of its more sustainable packaging: **more than half (51%) say they have already bought a product because its packaging seemed more environmentally friendly.** More than 4 in 10 even say they prefer products sold loose or without packaging (47%). Finally, packaging can also be a deterrent when it is perceived as harmful to the environment. More than one in three people even declare that they have previously refrained from buying a product because of its packaging (34%), and three quarters of French people say that they are too often confronted with excessive packaging when shopping (76%).

2. MULTIPLE OBSTACLES TO PURCHASING SUSTAINABLE PACKAGING

Despite their desire to do the right thing by buying more sustainably, respondents face significant obstacles: nearly 9 out of 10 (88%) cite at least one barrier to purchasing products with more environmentally friendly packaging. First and foremost, it is the cost that prevents them from adopting sustainable packaging (46% of French people believe that these products are often more expensive).

After price, purchasing habits are generally cited (32%), along with a lack of knowledge or clarity of information: 3 out of 10 French people say they are held back by not really knowing which packaging is more environmentally friendly (31%). Doubts as to whether it is even possible to reduce the environmental impact of packaging are in the minority (20% doubt that it really makes any difference). Far from being a matter purely for older people, the weight of habit is also felt among the younger generations, starting in the 18-24 age range (33%).

More generally, respondents expressed a certain scepticism about the credibility of environmental information on packaging: 83% of those interviewed agreed that environmental claims on packaging are not always credible. As a result, **most French people (86%) find it difficult to ascertain whether packaging is truly environmentally friendly.** Only a narrow majority of them (60%) trust brands to make the right choices when it comes to environmentally friendly packaging (60%).



3. HIGH EXPECTATIONS OF LARGE CORPORATIONS AND RETAILERS

Although French people recognise that packaging has improved somewhat in recent years, they believe that real change is yet to come. Some of them acknowledge the progress made in packaging in recent years: 42% believe it is more environmentally friendly, and 31% find it more innovative. However, 1 in 3 French people consider that it has changed little (34%). Looking ahead, they largely expect changes in the medium term: **8 out of 10 believe that packaging will have changed in 10 years' time (81%). Above all, they anticipate an increase in reuse (40%), a reduction in packaging volume (36%) and a limitation on the use of plastic (39%).**



Today, their expectations regarding packaging are clearly focused on sustainability. The ideal packaging for French consumers is, above all, reusable (41%) and environmentally friendly (26%), rather than easy to understand (19%) or forgettable (13%).



When it comes to the stakeholders who should be the first to take action to reduce the environmental impact of product packaging, respondents mainly point to private stakeholders: **more than half (53%) cite businesses (including 48% who cite large businesses and 23% who cite SMEs). Four out of ten respondents mention retailers, who are directly involved in the supply chain (39%).**

While government authorities (24%) and consumers (21%) are slightly less expected to play a role, **the 18-24 group reverses priorities, mentioning consumers (29%) before government authorities (19%).** It should be noted that 30% believe that all stakeholders should take action.

Moreover, consumers themselves are relatively open to the idea of paying more for a product with environmentally friendly packaging. More than a third of those interviewed said they would consider it (37%), although this is more often a matter of principle (31% of responses saying 'probably') than a firm commitment (6% of responses saying 'definitely').

AN ALL4PACK EMBALLAGE PARIS SURVEY (OCTOBER 2025)

PACKAGING SUPPLIERS/ USER INDUSTRIES, THE SHARED VISION OF COMMUNITY MEMBERS

1. A SECTOR TRAPPED BETWEEN REGULATORY PRESSURE, SOCIETAL EXPECTATIONS AND ECONOMIC REALITIES

How are the expectations, concerns and priorities of packaging industry players evolving? ALLFORPACK EMBALLAGE PARIS provides unique insight by comparing the results of its two surveys conducted in 2024 and 2025 among industry professionals. This dual barometer paints a picture of a changing landscape, where the ecological transition is coming up against increasingly severe constraints.

Packaging remains unavoidable, but...

In 2024, 95% of professionals considered packaging to be essential for selling a consumer product. By 2025, this figure had fallen to 92% (64% said it was 'very important', down 7 points; 27% said it was 'quite important', up 4 points). For 76% of respondents, its importance has increased over the last two years (down 7 points compared to 2024).



Recycling remains the number one priority

From one year to the next, the message remains clear: expectations are primarily focused on recyclability. In



2025, 75% of respondents cited easy-to-recycle packaging, compared to 68% in 2024. The use of lighter materials is also on the rise (52% compared to 50% in 2024), while the incorporation of recycled materials is still a must (50% compared to 45% in 2024).

The same trend can be seen in the innovations expected: alternatives to plastic (61% of respondents compared to 65% in 2024) and functional solutions (40% compared to 46% in 2024) remain at the top of the list, but the level of expectation is falling. Respondents are less enthusiastic than in 2024 and more critical of the lack of innovation in the sector.

Plastic: between a desire for less and market inertia

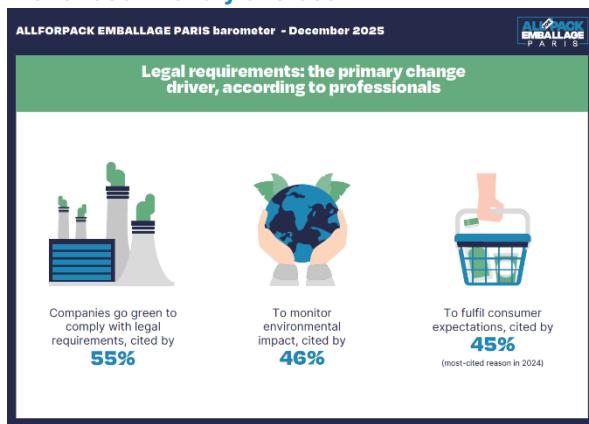
Over the two years, a stable majority (54%) believe that plastic use should decrease within two years thanks to alternatives. However, 21% predict an increase, citing growing demand. This paradox sums up the tensions in the sector: between environmental ambitions and industrial realities.

However, in 2025, respondents cited the most likely trends in a different order: while the transition to recycled or bio-based plastics remains at the top of the list (60% of responses, as in 2024), the rise of reusable plastic packaging solutions (38%) takes second place among expected trends, ahead of fibre composites with ever-less plastic (33% instead of 44% in 2024).

A tipping point: legal requirements become the main driver of eco-friendly choices

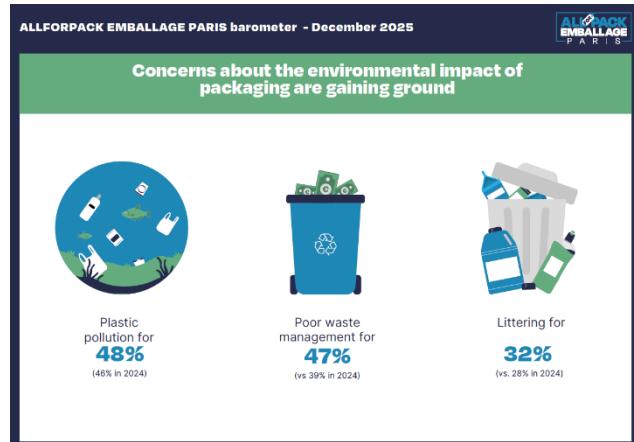
In 2024, companies went green mainly to meet consumer expectations. A year later, the hierarchy was reversed. **Legislation became the primary driver of change, cited by 55% of respondents, ahead of the company's environmental impact (46%) and consumer expectations (45%).**

The sector therefore appears to be moving forward under pressure, driven more by obligation than by buy-in. However, the image benefits (CSR) of a responsible packaging strategy are clearly gaining ground among the motivations (in fourth place with 41% of responses).



The obstacles are the same: cost, always cost

Nothing is changing in terms of barriers to adoption: the cost of materials remains the biggest obstacle, at 65%, way ahead of material quality (32%) and the necessary investment (26%). The ecological transition of packaging is therefore coming up against an economic wall, which is particularly visible in times of uncertainty.



Growing environmental concerns

Concerns about the impact of packaging on the environment are gaining ground. Plastic pollution (48% compared to 46% in 2024), poor waste management (47% compared to 39% in 2024) and the proliferation of litter (32% compared to 28% in 2024) are all on the rise in 2025.

This is an indication that attitudes are changing and that consumer pressure could take the upper hand.

Transparency and information: consumer expectations are changing

In 2024, consumers were perceived as primarily in demand of reusable packaging or alternatives to plastic. In 2025, according to respondents, their priorities changed: consumers were demanding greater transparency and more information on packaging (37%), asking for more reusable packaging (35%) and buying less and less plastic packaging (31%).

Two notable changes can be observed. Expectations regarding convenience are also increasing (26% compared to 22% in 2024), while the rejection of non-recyclable packaging is falling significantly (29% compared to 38% in 2024). This shift illustrates the growing maturity of the public debate: less radical rejection, more demand for guarantees and reliable information.

A tougher stance on regulations

Approval of the regulatory framework is deteriorating significantly. **In 2025, only 34% consider the rules to be 'adequate but improvable', compared to 44% in 2024.**

Criticism is growing: 26% believe that the regulations are not appropriate, and the most severe judgements – 'totally unrealistic' – have doubled to 11%.

Regulatory inflation seems to be generating misunderstanding and tension, highlighting a need for simplification and clarity.



Methodology

The OpinionWay survey for ALLFORPACK EMBALLAGE PARIS was conducted on a sample of 1,001 people, representative of the French population aged 18 and over, selected using the quota method based on criteria such as gender, age, socio-professional category, category of urban area and region of residence.

The ALLFORPACK EMBALLAGE PARIS survey was conducted among 200 companies, mostly in France (user industries, packaging manufacturers and distributors), and provides valuable insights into the mindset of the members of this community.

About ALLFORPACK EMBALLAGE PARIS

ALLFORPACK EMBALLAGE PARIS is the European multi-specialist tradeshow dedicated to the changing face of packaging since 1947. Its ambition is to inform, inspire and support industries in reinventing packaging and its life cycle, serving people and preserving the planet. In Paris, the show offers all industries and the entire packaging value chain a relevant and inspiring event to push technological and creative boundaries and together develop the approaches of today and tomorrow, from materials to the new life of packaging. With industry leaders, cutting-edge and emerging solutions, and a programme of high-value-added meetings and exchanges, ALLFORPACK EMBALLAGE PARIS brings together the sector's brands and professionals to provide them with the perspective they need to address their major strategic and business challenges. The ultimate goal is to turn the sector's challenges into levers for growth and transformation. Resolutely friendly and open – Paris will always be Paris! – ALLFORPACK EMBALLAGE PARIS is also a unique opportunity to create and consolidate links, forge new partnerships and share best practices among peers.

Find out more at www.all-for-pack.com

The next edition of ALLFORPACK EMBALLAGE PARIS will be held from 24 to 26 November 2026.

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