# Welcome

## Two Sides Packaging Webinar

## **'The Evolution to Paper Packaging'**

## 9.25 – 11.30 (GMT London)

18th July 2024

LOVE PAPER®
www.lovepaper.org

Print and Paper have a great environmental story to tell

TWO SIDES
www.twosides.info

# Ian Bates

Marketing & Partnership Director,
Two Sides

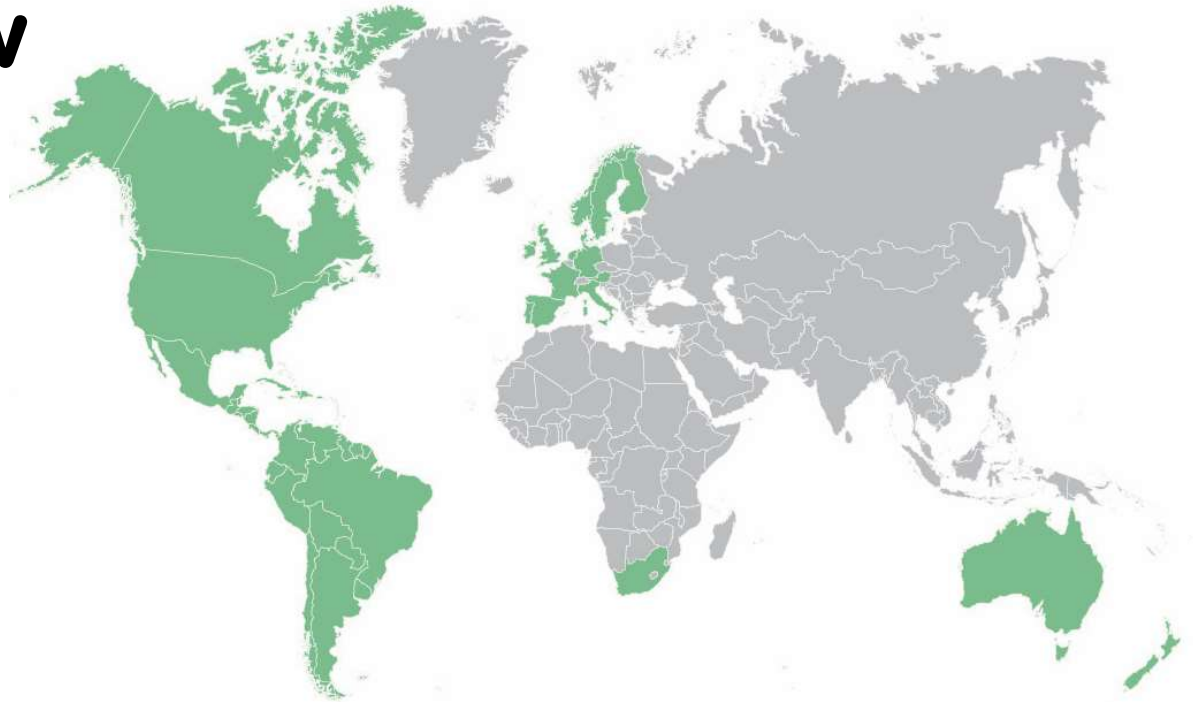
## Why Love Paper, why Two Sides?



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# Two Sides Overview



Founded in 2008, Two Sides is a global **not-for-profit**, membership organisation promoting the unique sustainable attributes of print, paper & paper-based packaging.

600+ members globally

Members include;

Industry associations, paper & board manufacturers and distributors, printers, mailing houses, postal operators, envelope manufacturers, packaging converters, OEMS, creative agencies & brands.

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Anti-Greenwash Campaign

Tackling Misinformation

Love Paper Campaign

Engaging with Brands & Consumers

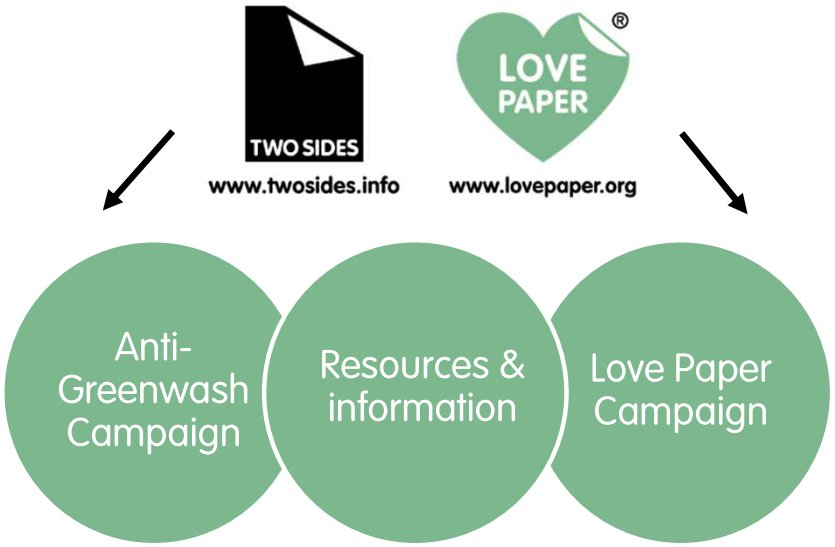
Resources & information

Factual Information, Events & Training

# Global Communications

## Business Professionals Focus

10 Language websites
180,000 visitors p.a.
Regular e-newsletters
Members resource area
Active on Social Media:
LinkedIn
Facebook
X




260,000 Website Visitors
16 million Social Media Reach
(annually)

## Consumer Focus

7 language websites
80,000 visitors p.a.
Regular e-newsletters
Active on Social Media:
Facebook
Instagram
X
TikTok

# Central Marketing Team



**Martyn Eustace**
Chairman

**Jonathan Tame**
Managing Director













**Ian Bates**
Marketing &
Partnership Director

**Josh Birch**
Campaign
Manager

**Tandy Wakeford**
Marketing Executive

**Gina Smith**
Greenwash,
Membership
& Events Manager

**Laura Clarke**
Design &
Marketing Executive

# Global Reach



**Jules Van Sant**
Executive Director



**Jill Crossley**
Director of Operations



**Fabio Mortara**
President
Two Sides Latin America



**Manoel Manteigas de Oliveira**
Technical Director,
Two Sides Latin America



**Heloísa Vidigal**
Marketing Director,
Two Sides Latin America



**Deon Joubert**
Executive Director,
Two Sides South Africa





**Kellie Northwood**
Executive Director,
Two Sides Australia and
New Zealand

# European Leadership Team



**Martyn Eustace**
Chairman



**Jonathan Tame**
Managing Director
Two Sides Europe



**Ian Bates**
Marketing &
Partnership Director
Two Sides Europe



**Josh Birch**
Campaign Manager
Two Sides UK



**Jan Le Moux**
Country Manager
Two Sides France



**Pedro Felipe Silva**
Country Manager, Portugal



**Magnus Thorkildsen**
Country Manager
Two Sides Nordics





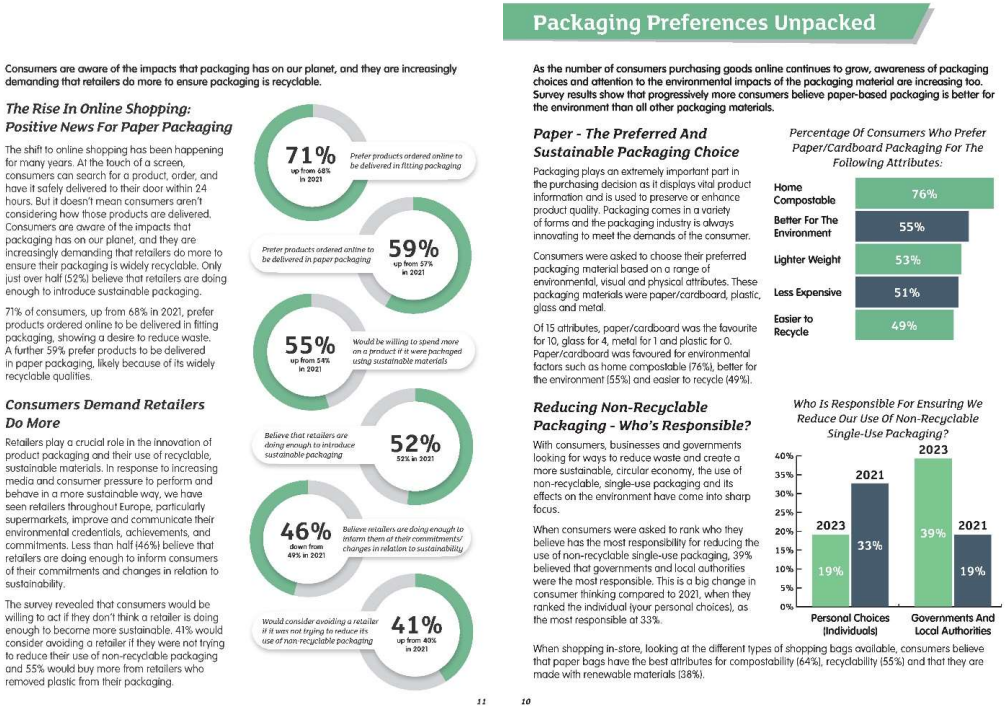
**Naciye Schmidt and**
**Anne-Katrin Kohlmorgen**
Country Managers
Two Sides Germany



**Massimo Ramunni**
Country Manager
Two Sides Italy

# Consumer Survey

- Every 2 years (2023, 2025) – over 10,000 people interviewed
- Consumer preferences for paper have improved post covid
- **Paper packaging is still the preferred environmental consumer choice**
- Consumers still believe European forests are shrinking
- There is still a significant gap between consumer belief in our industry's recycling record and reality



## Packaging Preferences Unpacked

**Consumers are aware of the impacts that packaging has on our planet, and they are increasingly demanding that retailers do more to ensure packaging is recyclable.**

### *The Rise In Online Shopping: Positive News For Paper Packaging*

The shift to online shopping has been happening for many years. At the touch of a screen, consumers can search for a product, order, and have it safely delivered to their door within 24 hours. But it doesn't mean consumers aren't considering how those products are delivered. Consumers are aware of the impacts that packaging has on our planet, and they are increasingly demanding that retailers do more to ensure their packaging is widely recyclable. Only just over half (52%) believe that retailers are doing enough to introduce sustainable packaging.

71% of consumers, up from 68% in 2021, prefer products ordered online to be delivered in fitting packaging, showing a desire to reduce waste. A further 59% prefer products to be delivered in paper packaging, likely because of its widely recyclable qualities.

### *Consumers Demand Retailers Do More*

Retailers play a crucial role in the innovation of product packaging and their use of recyclable, sustainable materials. In response to increasing media and consumer pressure to perform and behave in a more sustainable way, we have seen retailers throughout Europe, particularly supermarkets, improve and communicate their environmental credentials, achievements, and commitments. Less than half (46%) believe that retailers are doing enough to inform consumers of their commitments and changes in relation to sustainability.

The survey revealed that consumers would be willing to act if they don't think a retailer is doing enough to become more sustainable. 41% would consider avoiding a retailer if they were not trying to reduce their use of non-recyclable packaging and 55% would buy more from retailers who removed plastic from their packaging.



11 10

**As the number of consumers purchasing goods online continues to grow, awareness of packaging choices and attention to the environmental impacts of the packaging material are increasing too. Survey results show that progressively more consumers believe paper-based packaging is better for the environment than all other packaging materials.**

### *Paper - The Preferred And Sustainable Packaging Choice*

Packaging plays an extremely important part in the purchasing decision as it displays vital product information and is used to preserve or enhance product quality. Packaging comes in a variety of forms and the packaging industry is always innovating to meet the demands of the consumer.

Consumers were asked to choose their preferred packaging material based on a range of environmental, visual and physical attributes. These packaging materials were paper/cardboard, plastic, glass and metal.

Of 15 attributes, paper/cardboard was the favourite for 10, glass for 4, metal for 1 and plastic for 0. Paper/cardboard was favoured for environmental factors such as home compostable (76%), better for the environment (55%) and easier to recycle (49%).

*Percentage Of Consumers Who Prefer Paper/Cardboard Packaging For The Following Attributes:*



### *Reducing Non-Recyclable Packaging - Who's Responsible?*

With consumers, businesses and governments looking for ways to reduce waste and create a more sustainable, circular economy, the use of non-recyclable, single-use packaging and its effects on the environment have come into sharp focus.

When consumers were asked to rank who they believe has the most responsibility for reducing the use of non-recyclable single-use packaging, 39% believed that governments and local authorities were the most responsible. This is a big change in consumer thinking compared to 2021, when they ranked the individual (your personal choices), as the most responsible at 33%.

*Who Is Responsible For Ensuring We Reduce Our Use Of Non-Recyclable Single-Use Packaging?*



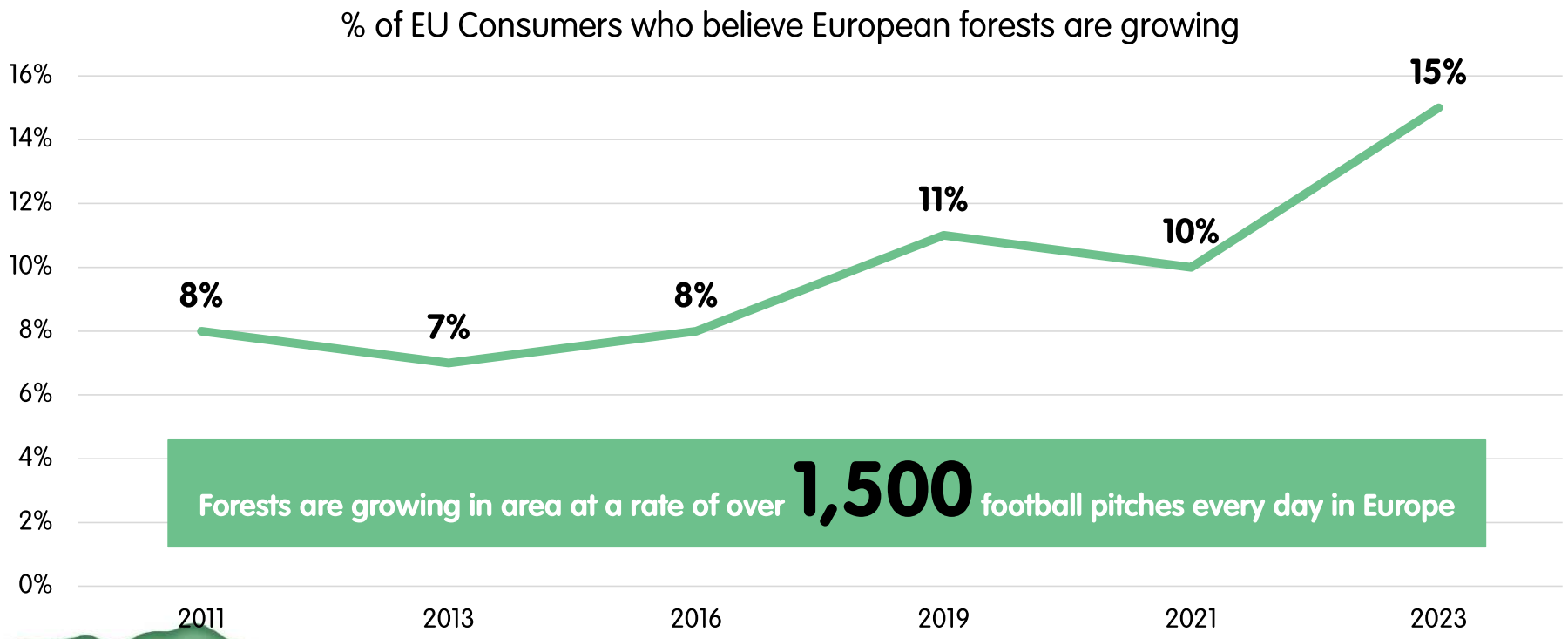
When shopping in-store, looking at the different types of shopping bags available, consumers believe that paper bags have the best attributes for compostability (64%), recyclability (55%) and that they are made with renewable materials (38%).

You can register to receive the summary report here:
www.twosides.info/trend-tracker-2023/

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# Q What do you believe has been happening to the size of the European forest area since 2000?

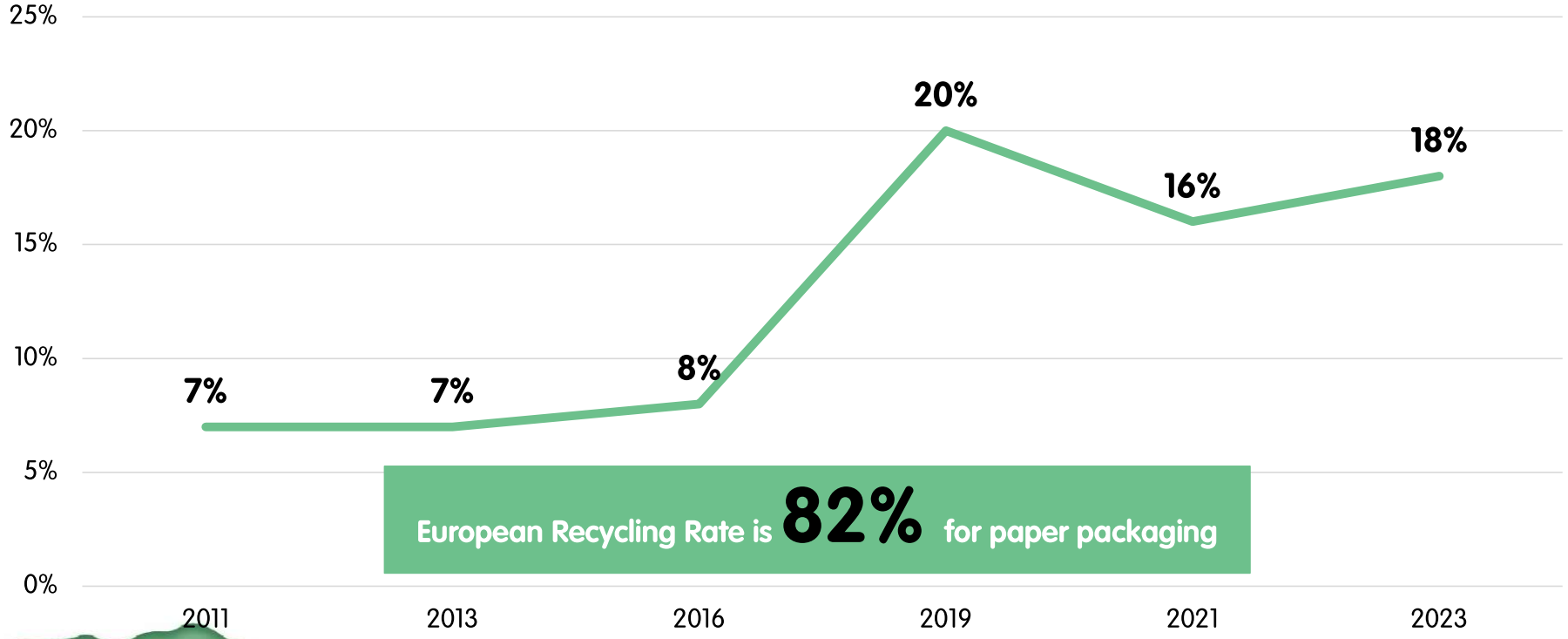



Forests are growing in area at a rate of over **1,500** football pitches every day in Europe

© Two Sides Ltd 2023

## What percentage do you think is recycled in Europe?

Percentage of respondents who believe the paper and paper packaging recycling rate to be over 60%.




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# Regulatory Changes

- Packaging & Packaging Waste Regulations (PPWR)
- European Deforestation Regulations (EUDR)
- Green Claims Code (GCC)
- Extended Producer Responsibility (EPR)
- Single-Use Plastics Directive (SUPD)

Detailed summary available from Two Sides



# Global Reach




**Love Paper ads published in:**

- Europe (UK, France, Germany, Italy, Sweden, Finland, Norway)
- U.S.A. & Canada
- Brazil & wider South America
- Australia & New Zealand

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# Love Paper messages reach 230m+ European consumers every year. Off the page and online







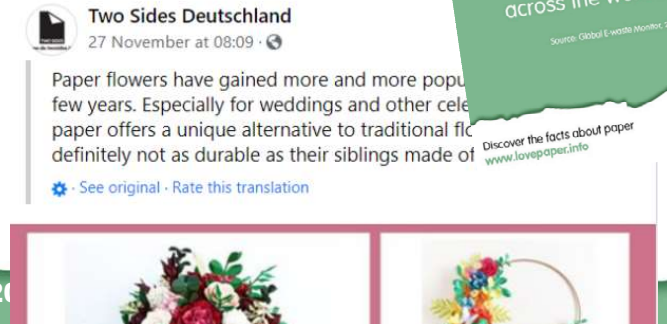
## Europe over 2,100 adverts in 2023







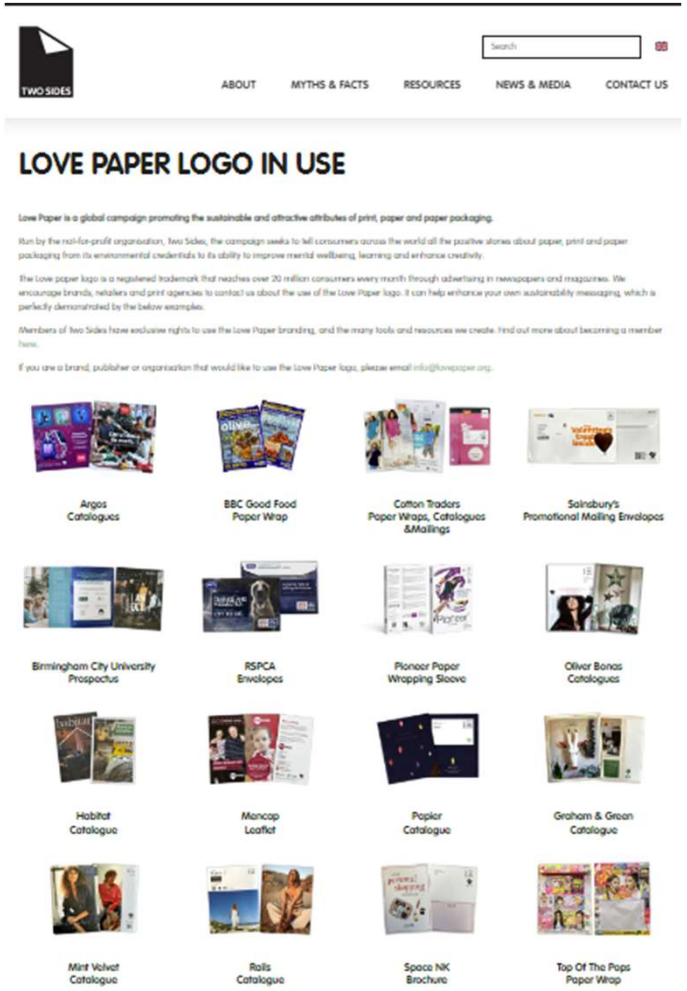


# Helping Brands tell the sustainable story of their paper use

https://www.twosides.info/love-paper-logo-in-use/



# Love Paper – Increasing Brand Engagement

Helping Brands tell the sustainable story of their paper products/communications

Examples;

- 4 million Argos Catalogues
- Cotton Traders on 20 million Catalogues
- Logo with QR code to the Love Paper site – Sainsbury's Mail Out












# Love Paper can also support on-pack brand engagement







PAPER PACKAGING
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KARTON PACKAGING
www.lovepaper.org

CARD BOARD
www.lovepaper.org

CORRUGATED PACKAGING
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PAPER CUPS
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PAPER BOARD
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# Resources and Marketing Materials

Widely used by the industry

NEW automated access to personalised materials











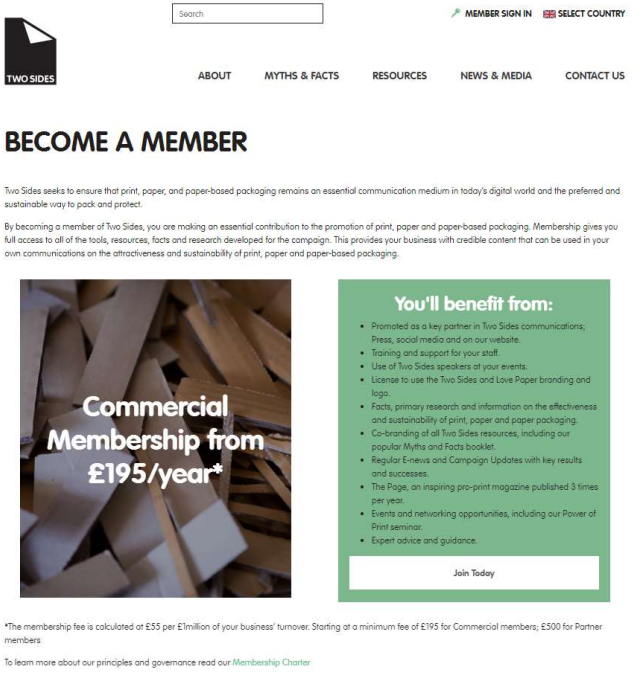







# Welcoming New Members – We Need Your Support!




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# Q&A

**Ian Bates**
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