KANTAR PUBLIC

Opportunities to get Dutch people and Dutch supermarkets moving to use and introduce reusable packaging

Ministry of Infrastructure and Water Management

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Management summary – research set-up

Starting point

With the implementation of the SUP guideline and the Plastic Pact NL, efforts are being made to switch from disposable plastics to reusable packaging. The Ministry of Infrastructure and Water Management plays an important role in the Plastic Pact and in reducing the environmental impact of plastics and promoting circularity. Packaging for supermarket products accounts for a large share of the amount of single-use plastics in the Netherlands.

Purpose of this research

It is therefore important for the Ministry to map out the opportunities for promoting the (further) introduction of reusable packaging in supermarkets: how supermarkets view this, as well as how consumers feel about it. It is expected that if consumers are positive, the threshold will also be lower for supermarkets to offer reuse options.

Research set-up

Kantar has conducted research exploring the opportunities for various options that supermarkets have to encourage reuse. These options are based on the four 'reuse models' of the Ellen MacArthur Foundation: refill on the go, refill at home, return from home and return on the go.

At the start of the research project, a kick-off meeting took place in which a wide-ranging group of stakeholders from the government, supermarkets, environmental organisations and the packaging industry provided their input.

The research consists of two parts. **Part 1 is a quantitative consumer survey using** an online questionnaire that was completed in April 2021 by a representative group of n= 1,020 Dutch people aged 18 and older. In this study, Kantar's commitment model was used to measure how promising different 'reuse models' are. In addition, Kantar's Behaviour Framework was used to measure which drivers most strongly promote the use of each reuse model and which barriers hinder each model the most. Each respondent answered questions about one of the four reuse models, based on the product category that he/she found most appropriate for this model.

Part 2 of the research is a **qualitative study among supermarket managers.** N=6 interviews with managers of head offices and n=6 interviews with managers of local branches were conducted at the beginning of June 2021. This was a follow-up to part 1 (consumers). In the interviews, the current state of affairs with regard to reuse within the supermarket was discussed as well as the way in which they viewed each of the four reuse models. Insights from the consumer survey were also shared with the managers from supermarkets.

Finally, **part 3 is a short desk study** of experiences with reuse options in supermarkets in France and the UK, to serve as an inspiration for Dutch retailers**.**

Management summary - outcomes

Insights part 1 - consumers

The consumer research shows a lot of potential for all four reuse models. Based on our commitment segmentation, we see that the group that is open to each of the reuse models is large, while there are relatively few real opponents or skeptics. In general, we see that a large part of the Dutch citizens consider it important that attention is being paid to reducing disposable packaging and that they are open to replacing them with reusable variants.

There is a high intention to use each of the reuse models, but the products that are seen as appropriate for each of these systems differ between the reuse models. Refill on the go is mainly seen as suitable for dry products such as fruit and vegetables, bread, eggs, pasta, rice and grains, while refill at home is mainly seen as an option for cleaning and care products and soft drinks. People see many possibilities for both return from home and return on the go, among which eggs, soft drinks and cleaning products are also often mentioned.

Looking at the main driver of a high commitment to using the reuse options, the contribution to a better environment is apparent as highly important in all reuse models.

The feeling ‘this is not for me' emerges as a strong barrier for three of the four models, indicating that attention to perception and social norm is needed when introducing reuse options.

The fact that reuse requires extra effort from consumers, such as bringing their own packaging, cleaning in between and storing and returning empty packaging, is also an important barrier to take into account.

Insights part 2 – supermarkets

In principle, supermarkets are very positive about the introduction of reusable packaging options. They are both intrinsically motivated and feel an external pressure from social sentiment as well.

However, there is a strong need for certainty and many supermarkets prefer to see someone else take the first risk before investing a lot themselves. Substantiation and evidence from research is also desirable. In addition, it will be appreciated if sector-wide agreements are made so that risks are shared. Which they also see happening if changes are even made mandatory by government. Finally, people are very open to the introduction of reusable packaging by premium brands (this applies to supermarkets that sell premium brand products).

Most supermarkets see opportunities for all four reuse models, although the preference differs per product group and between supermarkets. Refill on the go is most often mentioned as the preferred model, partly because people have already gained some experience with it or seen it with competitors. Return on the go is also seen as promising because both supermarkets and consumers have experience with deposits on bottles. However, there are some doubts as to whether supermarkets should take on the task of collecting even more empty packaging.

Management summary - advice

Overall advice

Based on this research, we recommend that the Ministry together with the Plastic Pact and industry associations help supermarkets find the security they desire. To do so, the following opportunities can be seized:

- Share best practices from abroad (and the Netherlands where possible);
- Search for collaboration with developers or knowledge institutes to develop 'smart solutions' for perceived barriers around hygiene, weighing systems, etc.
- Share this research;
- Set up sector-wide agreements and demand commitment from supermarkets;
- Adapt legislation or regulations so that some solutions (such as deposits) are introduced everywhere and disposable options are phased out;
- Involve A-brands, who themselves invest in reuse options and thus accelerate the use of reusable packaging.

Expanding refill on the go options will be a good first step, in line with current developments within supermarkets. Start with dry products with relatively few hygiene risks.

The fact that refill on the go is very visible in stores can help get the reuse of packaging more ‘into consumers systems'. This is reinforced if this is promoted by supermarkets and if people are even rewarded for bringing your own packaging.

Emphasize the positive result of using reusable packaging options: a substantial contribution to a better environment, since we found that this is an important driver for consumers.

In order to reduce the difficulty perceived by consumers of taking packaging with them, it is important to pay attention to the design of convenient packaging, as well as appealing reminders for home (for taking your (empty) packaging to the store).

Good looking, attractive packaging is important to make taking along and refilling reusable packaging feel more like something that suits people personally. Personalization (e.g. packaging with your name on it) can enhance this.

In addition, it is important to emphasize in communication that more and more people and a great diversity of people are participating in reuse.

1
Introduction and context outline

01

CONTEXT

With the implementation of the SUP-guideline and the Plastic Pact NL, a commitment is made to the conversion from disposable plastic to reusable packaging. The environmental pressure of plastic must be reduced herewith and circularity must be promoted. Specific goals have been established which the Netherlands must stand for in 2025 and the Ministry of Infrastructure and the Environment plays an important role in this. Although this mainly concerns a supply-driven challenge, the consumer also has an important role. It is also important that supermarkets, which sell a large proportion of disposable plastic products, are willing to go along with this conversion. That is most likely to happen when they dare to trust that consumers are also open to this. Currently, the Ministry of I&E has relatively little insight into consumers’ current knowledge, attitudes and behaviour(al) intentions regarding reusable packaging in supermarkets. There is also insufficient insight into the motivations and resistance that are uppermost in the minds of supermarket managers surrounding the offering of less disposable packaging. However, experience has been gained abroad with various 'models’ of reuse, which may serve as an inspiration to the Netherlands.

02

PURPOSE OF THE RESEARCH

The purpose of this research is ultimately to map out chart where the opportunities lie for (further) introduction of reuse options for product packaging in supermarkets. Insights into motivations and resistance of both consumers and supermarkets are required to do this. In the research we use the four reuse models of the Ellen MacArthur Foundation as a starting point.

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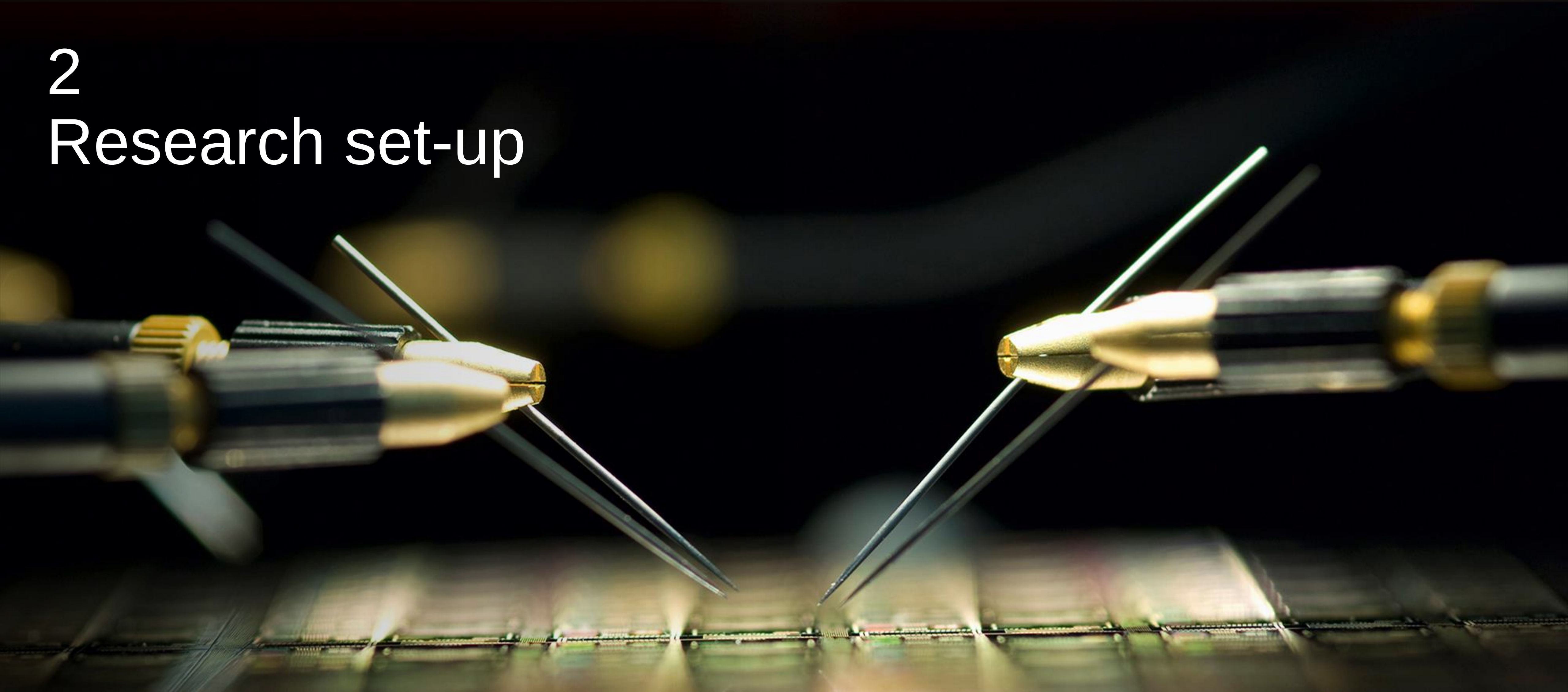
KEY QUESTION

This research is focused on the question:

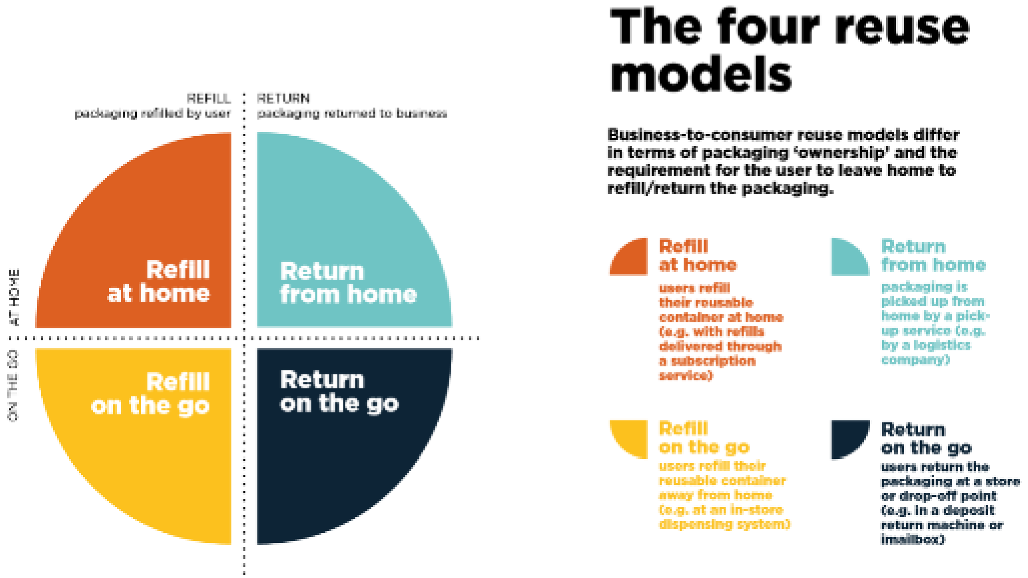
How can the transition to more reusable packaging for supermarket goods be successfully started in the short term?

2
Research set-up



A few starting points for the research

- In this research our focus will be specifically on the buying and selling of products in supermarkets.
- In this research our focus will be on the four ‘**reuse models**’ (also referred to in this report as **‘reuse options’**) that have been developed by the Ellen MacArthur Foundation*, in which we examine the question: which model is currently most promising among consumers? And how do supermarkets view this?
- The research consists of two parts:
  - In **sub-study 1** our focus is on the **consumers** target group (Dutch people over 18 years old).
  - In **sub-study 2** our focus is on the **supermarket managers** target group**.** This is a follow-up to sub-study 1, in which consumers’ insights have been included.



* https://www.ellenmacarthurfoundation.org/assets/downloads/Reuse-book.pdf

Research set-up: two sub-studies

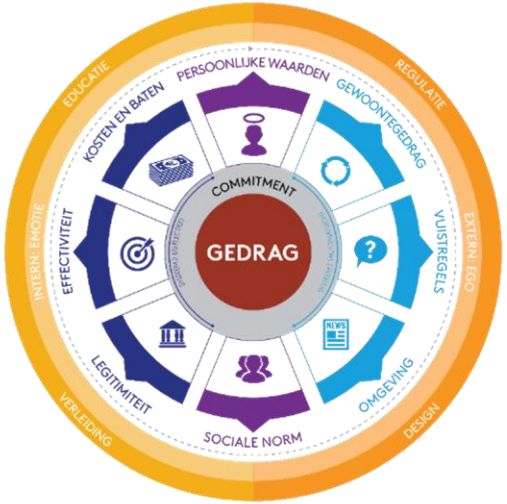
Sub-study 1: quantitative research among consumers

- In this research we have discovered which potential motivations may promote the use of recycling options by consumers and which barriers may hinder this use.
- Each respondent has answered questions about one of the four reuse models, to prevent the models influencing each other.
- The motivations and barriers have been put to consumers in the questionnaire in the form of statements.
- The influence of these motivations and barriers have been specifically analysed for each reuse model using a regression analysis, which indicates how strong the impact of each factor is on the intention to use the reuse options.
- To determine the motivations and barriers for consumers which have been presented in the questionnaire, the Kantar Behaviour Framework (shown here) was used as a starting point. Based on this, Kantar has set up possible motivations and barriers for each reuse model.
- During a kick-off meeting with IandE and a diverse group of stakeholders, this has been combined with their knowledge and experience from practice. Thus a definitive list with motivations and barriers to be examined has been established.

Sub-study 2: qualitative research among supermarket managers

This part of the research was aimed at potential motivations for introducing (pilots with) various reuse models within supermarkets. As well as the barriers that supermarket managers themselves see in doing so.

- There were discussions with managers of various supermarket chains that joined the Plastic Pact.
- There were discussions with 6 managers at head office level and 6 managers at local (branch) level (for a full overview, see research specifications).
- They have each given their opinion on *all four* reuse models.
- Some of the findings of the consumer research were also submitted in the interviews.



Kantar Behaviour Framework

Scenario descriptions of the four reuse models

These four scenario descriptions were submitted to consumers who took part in the quantitative research; this is discussed in the qualitative research among supermarkets, with several pictures to support it (these can be found in the attachment)

Refill on the go

Imagine you're going to do some shopping. In the supermarket you can bring your own recyclable packaging for certain products to fill yourself (i.e. a small cotton bag/carrier bag or a small container). As is already common practice with fruit and vegetables. You can then use your own reusable small cotton bag/carrier bag instead of buying pre-packed products or using the thin plastic (disposable) bags that the supermarket still offers sometimes. However, it is also still possible to buy pre-packed products. On the shelf you can choose between pre-packed or refill.

Refill at home

Imagine you're going to do some shopping. In the supermarket you can now choose to buy some products that you usually buy in a much smaller refill package. That refill package contains a concentrated version of the product. You can use this to refill an empty package at home. Such as, for example, fruit syrup that you dilute with water. That is also possible with, for example, a highly concentrated cleaning product that you have to dilute yourself. In addition to this refill packaging, the disposable packaging that you were used to, is also still for sale in the supermarket.

Return from home

Imagine you are doing some shopping via an online supermarket. You may choose to buy some products in reusable packaging. You can keep this packaging when it is empty. It will then be collected from your home and in exchange you will get a small deposit back. At the same time, a full package can be delivered if you opt for that. The empty package is cleaned, refilled and sold again in the (online) supermarket. In addition to this reusable packaging, the packaging that you were used to is also still for sale.

Return on the go

Imagine, you're going to do some shopping. In the supermarket you can buy certain products you need in reusable packaging. You can return this packaging at your supermarket when empty. In exchange you will receive a deposit, such as we are already used to with bottles on deposit. After that, the packaging is cleaned, refilled and sold in the supermarket again. In addition to thus reusable packaging, the packaging that you were used to is also still for sale.

Key question and research questions sub-study 1: consumers

How can the transition to more reusable packaging for supermarket goods be successfully started in the short term?

- What is the current knowledge, attitude and behaviour of consumers surrounding reusable packaging in supermarkets?
- Which reuse model for supermarket goods should be the focus according to customers, because it is currently the most promising?
- Which motivations and barriers experienced by customers must be taken into account the most for a successful introduction?
- What other advantages can supermarkets gain from facilitating a reuse model?

Key question and research questions sub-study 2: supermarkets

How can the transition to more reusable packaging for supermarket goods be successfully started in the short term?

What is the current knowledge, attitude and behaviour of consumers surround reusable packaging in supermarkets?

Which reuse model for supermarket goods must be the primary focus according to customers, because it is currently the most promising?

Which motivations and barriers experienced by supermarkets must be taken into account the most for a successful introduction?

What can be learned from success stories in other countries?

Reading guide

01

In this report, the results of the two sub-studies can be found together. We will start with the overall conclusions and recommendations of both sub-studies. After that, the results of sub-study 1 (consumers) will be worked out and then the results of sub-study 2 (supermarkets).

02

In the report, results are shown from both the quantitative research among consumers and the qualitative research among supermarkets: Consumers/quantitative slides can be recognised by this symbol:

Supermarkets/qualitative slides can be recognised by this symbol:

03

When significant differences are shown in graphs between groups, percentages that significantly differ compared to each other are indicated with a +/- sign.

04

In some cases, the total of percentages in graphs does not add up to exactly 100%. This may be due to rounding differences or because it is a multiple question (whereby a respondent can give more than one answer).

05

Literal quotes from respondents can be recognised by *text in italics* and “quotation marks”.

Research specifications sub-study 1: consumers

Target group
Dutch people aged 18 and over, representative in terms of age, gender, region, income, education level, social class and household size.

Sample(source)/ response
The sample was selected from our consumer panel Kantar NIPO base. A gross number of n=2000 consumers were invited, of whom n=1020 took part (51% response).

Online method
For this study, the CAWI (Computer Assisted Web Interviewing) method was used: online research whereby we invited the respondents via e-mail. The respondents started the questionnaire via a link and were able to take a break from the questionnaire at any time and complete it at a later stage.

Questionnaire
The average completion time of the research was 10 minutes. The questionnaire was drawn up by Kantar in consultation with the Ministry of I&E. The input was used for this from several stakeholders who took part in the kick-off meeting (including representatives of supermarket chains, the packaging industry, organisations involved in sustainability/environment and the Ministry of I&E).

Incentives
Respondents will receive a small compensation for taking part in the form of Ni points. With the points they have saved, they can order a gift voucher or they can donate an amount to charity.

Fieldwork
The fieldwork ran from 20 to 26 April 2021

Research specifications sub-study 2: supermarkets

Target group
Managers of supermarkets: 6 interviews with sustainability/quality managers at head office level and 6 interviews with branch managers. Interviews with 2 of the head offices were conducted with 2 people at the same time instead of 1. The table here shows which supermarkets are involved in the research. The choice for these supermarkets was made in consultation with I&E.

Recruitment
Head office managers are recruited through contacts of I&E within the Plastic Pact. Branch managers are recruited via a specialist recruitment agency.

Method
In-depth interviews have been conducted on-line via MS Teams. The discussions lasted 45 minutes to 1 hour.

Fieldwork
The fieldwork ran from 1 to 14 June 2021.

Chain	# head office	#branch
Albert Hein	n=1	n=1
Lidl	n=1	n=1
Ueda/Echoplanar	n=1	n=1
Plus	1 interview with 2 people	n=1
Aldi	1 interview with 2 people	
Supertunic	n=1	
Jumbo		n=1
Vomer		n=1

3
Insights and recommendations

Consumer insights

Consumer research shows there is a great deal of p**otential for all models.** The group that is open to each model is a large one, while there are relatively few real opponents or sceptics.

The general feeling at this time seems to be a positive starting point: most Dutch people think it's important to focus on reducing disposable packaging. They say they don't have any problem with certain disposable packaging being completely replaced by reuse options. Of course, what people say is not always what they put into practice, but it offers **fertile ground for offering more reuse options**.

However, there are differences in perception of reuse options between various groups of consumers. Thus we see that people aged 55 and over are more often 'ambassadors' or 'willing people' with regard to the refilling of packaging (refill on the go and refill at home). Women and the more highly educated are also (somewhat) more positive about all models and return from home seems to have somewhat greater potential in the western region.

The fact that consumers are open to it makes the use of (pilots with) reuse options interesting, which is reinforced by the fact that many consumers say that this **makes a supermarket more attractive**.

Although all reuse models result in a positive behavioural intention, this does vary per product type. So it will be sensible to **look at which model is used for each product category**.

Refill on the go: considered as mainly suitable for fruit and vegetables, eggs, pasta/rice/cereals and bread.

Refill at home: cleaning products, care products and soft drinks are preferred.

Return from home: many different products are deemed suitable. Eggs, soft drinks and cleaning products top the list.

Return on the go: also many different possibilities, with eggs, care- and cleaning products and dairy at the top (soft drinks were not given as an option because this already happens as standard).

The reuse models each have their own set of motivations and barriers that may stimulate or limit the use thereof. Thereby we see many common denominators:

Contributing to a better environment (and the good feeling that reuse gives) is by far the strongest motivation for all models. Hence it is definitely something to (continue) emphasising, also because we see that 'not believing that this makes a difference for the environment' is actually a strong limiting factor.

A major barrier for three of the four models has to do with the self-image (possibly prompted by the social standard): **'it is not for me'.** So it's important to focus on the perception of reuse, the social standard and how you can make sure that it does become something for people. By making it fun and attractive, something that suits them/their lifestyle.

Having to put in extra **effort** (bringing your own packaging, cleaning in-between, keeping packaging and returning it) is a barrier for most models and something to consider at the implementation stage by supermarkets: how to make it as easy as possible for consumers.

Insights from supermarkets

The **basic attitude of supermarkets regarding reuse options is positive**, there is a willingness to do more with reuse. This is both from their own intrinsic conviction and more extrinsic by society's feeling and the feeling that you should go along with it.

The level of **initiative and activities varies greatly between supermarkets,** which mainly relates to the different strategies/formulas of supermarket chains. Naturally there are frontrunners and followers, they themselves see it like that too.

Just like consumers, managers are also **positive about all four of the reuse models examined.**

Each model has its own advantages and barriers. The desirability of each model also varies for each product group.

Refill on the go is mentioned most often as the preferred model, but refill at home and return on the go are also often mentioned as favourite.

The 'on the go' options both (among others) seem **to be attractive because they are already somewhat familiar**/are being offered.

With refill on the go, **a lot of experience** has been gained **lately** with the offer of reusable bags for fruit and vegetables. Because of this, one becomes familiar with it and supermarkets see that it can work. But there are questions involving hygiene, product quality, wastage, shop design and weighing systems and whether consumers really want it.

Return on the go is attractive for some because of the good experience and familiarity with **deposit bottles**, but some supermarkets **doubt whether they should take on the collection/storage of empty packaging** (or if this belongs to other parties).

To turn willingness into the actual offer of more reuse options, **supermarkets are mainly looking for security**. By which internal and external stakeholders can be convinced and there does not have to be any fear of loss of turnover or profit. What is required is:

- Substantiation/proof that consumers want to go along with this and that it does not cause difficulties regarding management and quality.
- Through supermarkets that are frontrunners, but also, for example, through research and **knowledge institutions**;
- Through practical examples where it works, **best practices**;
- **Pilots** also fit in with that (although this is difficult for investment if a reuse option has a lot of impact on production or logistics).
- **Support from external parties** for reducing risks and informing consumers.
  - **CBL** can help implement developments industry-wide.
  - **Plastic Pact NL** can help by coming to some arrangement with the industry and stakeholders.
  - The **government** can also pave the way for momentum with appropriate laws and regulations.
  - New introductions by **top brands** make it easier.

Consumer + Supermarket recommendations (I)

Use the positive stance of the supermarkets. The focus everywhere is on sustainability and packaging. It seems that they mainly need a little push in order also to focus on the expansion of reusable options in addition to reducing packaging and introducing recyclable packaging.

In order to offer supermarkets **the security,** they need to take steps towards reuse options, and the government (Ministry of I&E), Plastic Pact and/or branch organisations can facilitate a number of things:

- Draw attention to **successful examples**/best practices of foreign (and where possible also Dutch) supermarkets.
- Enter into **partnership with developers or knowledge institutes**, which can develop systems with which problems expected around food quality, hygiene and liability (particularly for refill on the go) can be eliminated.
- Share Part 1 of this **research (consumers)**, giving confidence that many consumers are open to different reuse options.
- Give **industry-wide** consideration to practical matters that every chain comes up against, such as liability, product information and setting up weighing systems.
- Where possible **adapt laws or regulations**, whereby supermarkets will have to take certain steps and consumers have to go along with it. This ensures a shared risk for the supermarkets. Recent experience with deposits on small bottles has shown that this works.
- Enter into partnerships with **quality brands** that (want to) develop reuse options.

When looking at supermarket preferences, **starting with Refill on the go** seems to be recommended. With consumers too, this (besides other models) emerged as a good contender.

Refill on the go was **mentioned most often as the preferred option** by supermarket managers. Moreover, it is sensible to go along with the momentum which has been created by introducing reusable bags for fruit and vegetables (and bread in some shops).

Use of this system for vegetables, fruit and bread seems to be progressing already and will continue to do so. To expand this further to other categories: **start with products where hygiene and loss of quality/wastage are least risky.** Items such as pasta and rice, but also the eggs mentioned by consumers may be an option.

Another reason to commit to the stimulation of refill on the go is that it's also very **visible** to consumers, which helps to **normalise** the reuse of packaging and get it 'into consumers' systems'.

Consumer + supermarket recommendations (II)

Refill at home, especially for service-supermarkets, seems to be a form of low-hanging fruit, particularly if this can be explored initially by offering refill products that have already been developed by (top quality brand) suppliers. Developing similar products within own shop brands seems to need more time.

For **Return on the go** **and** **Return from home,** it is advisable to **discuss within the industry to what extent supermarkets want to facilitate the collection of more packaging,** or if they want to leave that to other parties (in other places) or if they want to enter into partnerships with other parties to do this. Of course, supermarkets can still play a role in this by selling the products in reusable packaging. In addition, supermarkets who believe this is important can still do so and maybe stand out in this way.

In order to prompt **consumers to start to use reuse options**, both the government and supermarkets can do a number of things:

- Supermarkets can help **normalise** reuse, i.e. including encouraging consumers to bringing reusable packaging with them, buying refill at home options (promotion, rewards) and by smart communication (also see the column here).
- **Informing** consumers by supermarkets and governments. Communication to **make** consumers even more **aware** of reuse options and letting them get more familiar with them, in order to **reinforce this normalisation**:
- As mentioned on the previous page: **appropriate regulations** ensure that supermarkets and consumers have to go along with this. And we see in the research that completely replacing disposable packaging with a reuse option meets with relatively little resistance from consumers.

Looking at the **motivations and barriers that influence the intention of consumers to use the reuse options the most,** the following is important for supermarkets to anticipate:

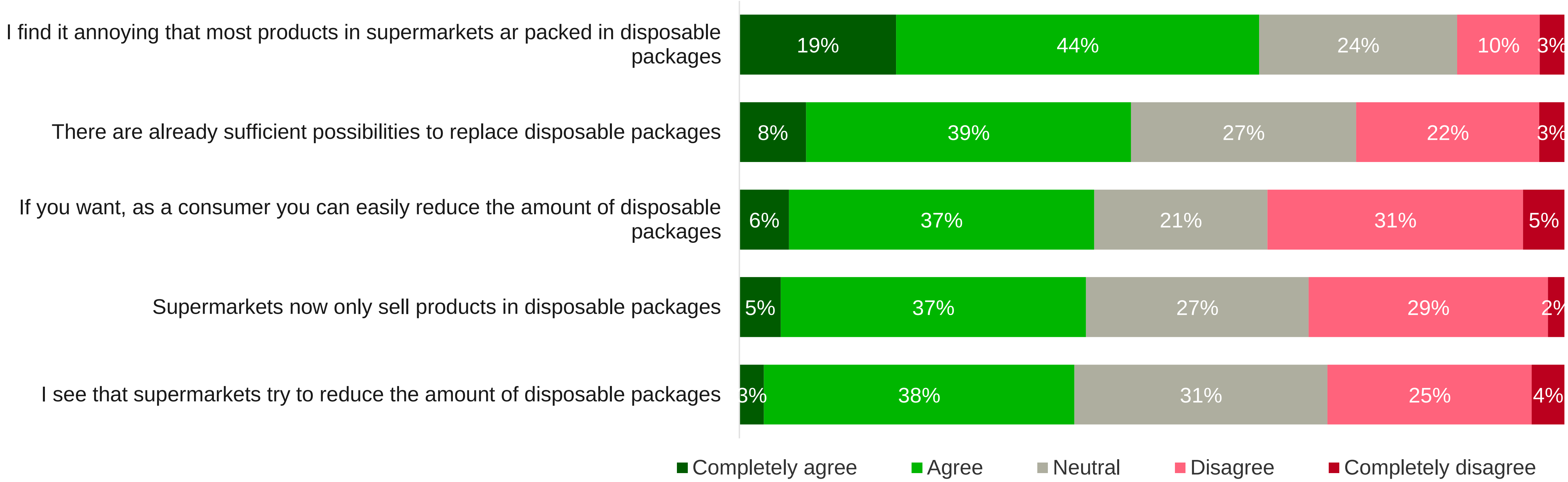
- The (perceived) difficulty of bringing your own packaging: make it easy. This is possible through clever design of packaging (small, light, stackable or foldable) and by reminders at home (before you go to the shop) such as fridge stickers or keyrings. Finally, also offering new/spare reusable packaging in the shop is a good idea in case one still forgets it occasionally.
- The (perceived) difficulty of keeping, potentially cleaning and returning empty packaging may be eliminated by yet again a clever design of the packaging, consider, for example, stickability and light weight.
- Eliminating the idea that bringing of their own packaging does not suit people: this can be done by offering nice packaging that make it attractive to people. Consider also personalisation, i.e. a bag with your name on it, whereby it feels even more like something that suits them. Moreover, supermarkets can stand out with this packaging.
- It is also important to emphasise in communication that ever more people are making use of this possibility, so the (perceived) social standard will change. Show in shops and advertisements (of supermarkets or from the government) that this is being done by a wide-ranging group of people in which one can recognise oneself.
- The belief that it contributes to the environment proves to be important. In communication, emphasise in particular the positive result that reuse brings: a substantial contribution to a better environment.

Sub-study 1- consumers

4
Current knowledge, attitude and behaviour of consumers

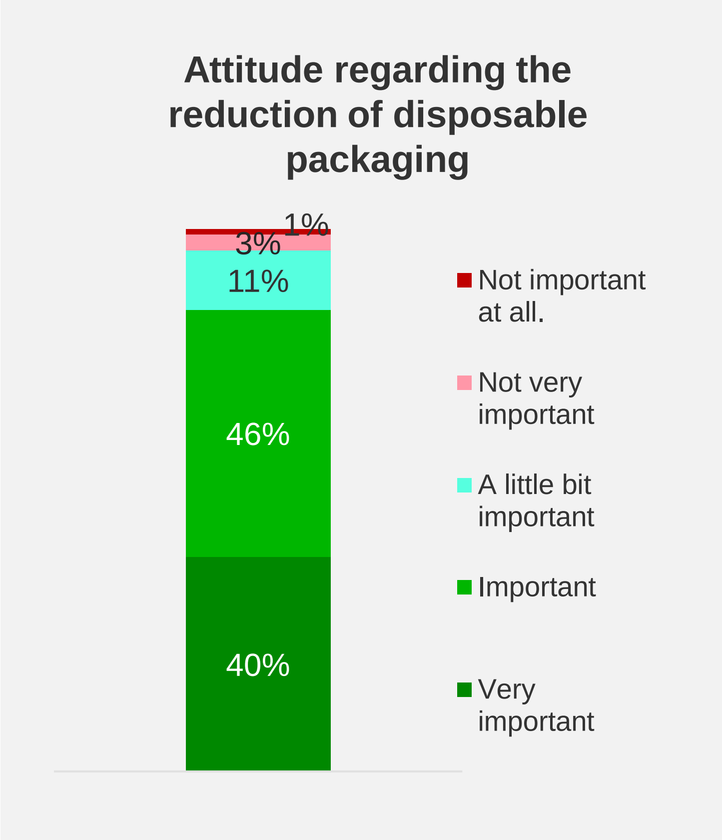
Well over 6 out of 10 state that they find it annoying that most products in supermarkets are packaged in disposable packaging – only 13% do not find this annoying

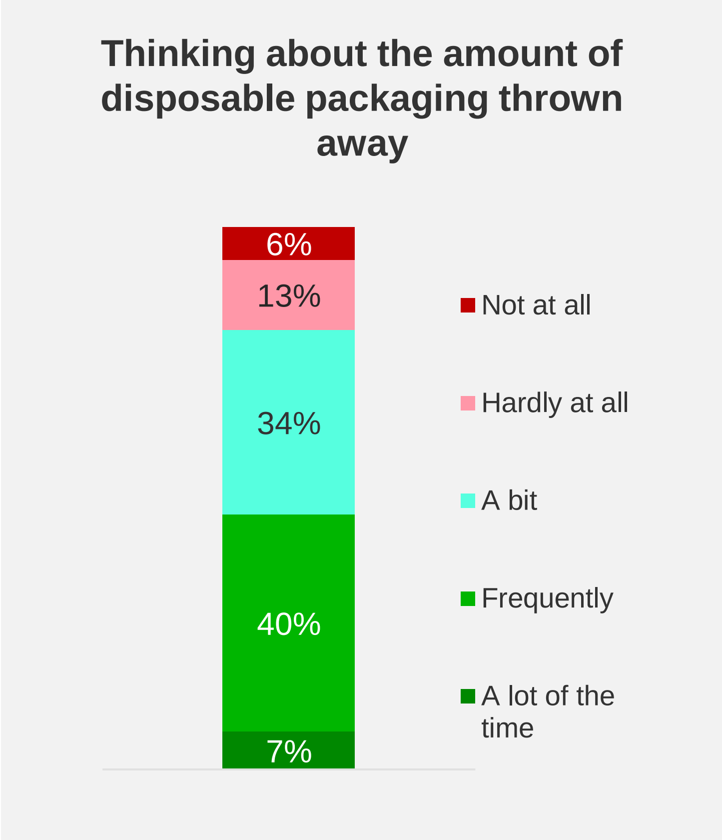
Slightly less than half sees that there are already possibilities/opportunities are being offered to reduce disposable packaging

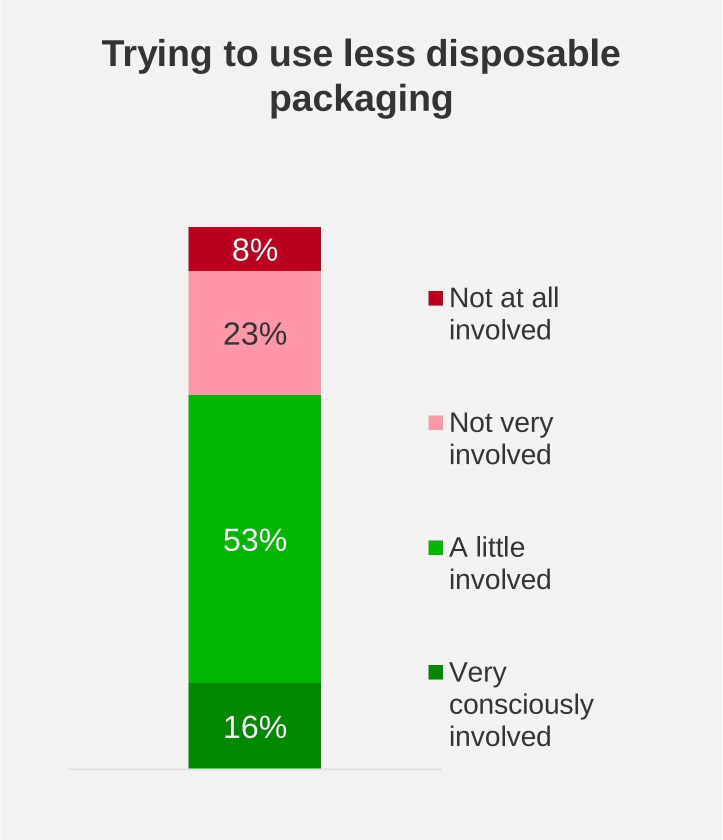


Q002. To what extent do you agree or disagree with the following statements? Basis n=1020

Nearly everybody thinks it is (to some extent) important that more attention is paid to the reduction of disposable packaging, but a significantly smaller group is already involved in reducing the personal use of some disposable packaging.







Q003. How do you feel about the fact that attention is paid to reducing the amount of disposable packaging? Basis n=1020

Q004. Does the amount of disposable packaging you throw away daily concern you? In other words: do you ever think about it? Basis n=1020

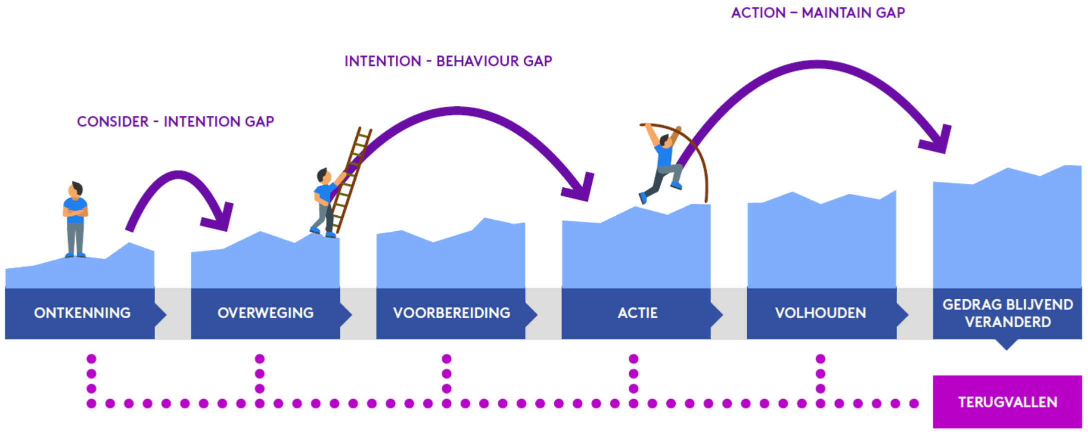
Q005. Do you yourself ever try to use/throw away less disposable packaging? For example by buying products with less packaging material or by reusing packaging? Basis n=1020

5
Most promising reuse model according to consumers

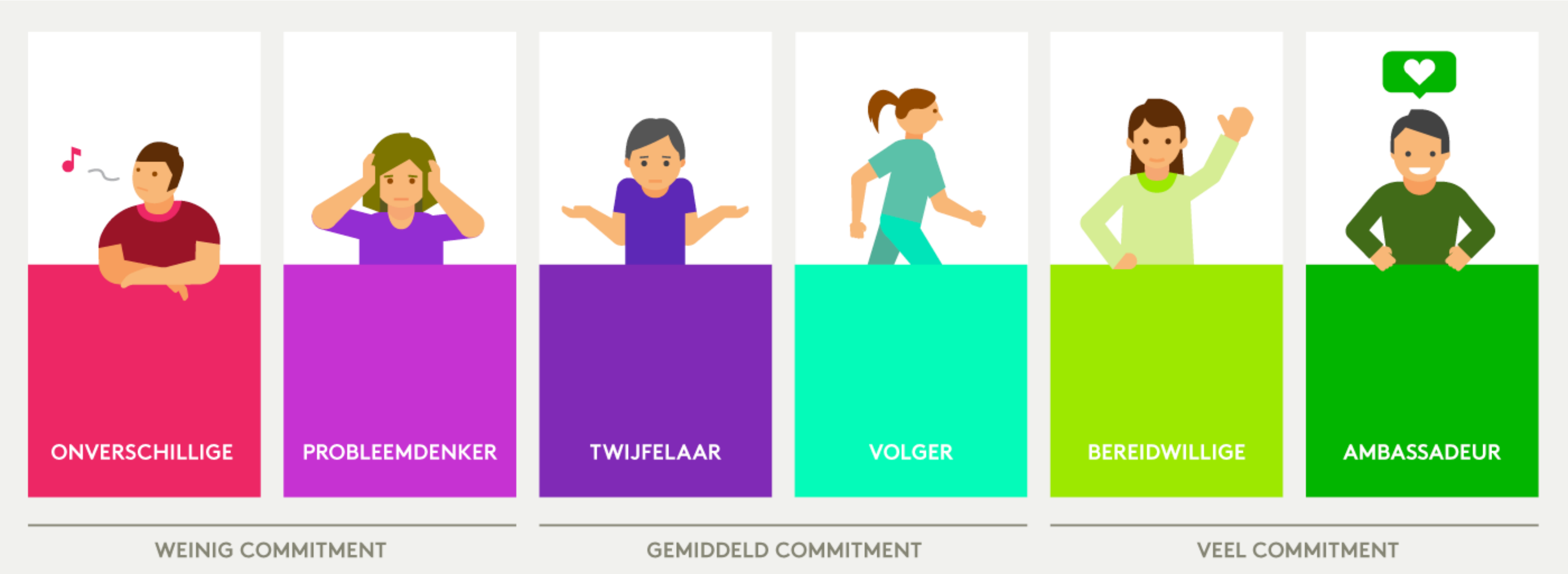
How do we determine which reuse models are most promising to use first of all?

In this research we take the following into account:

- Behavioural change requires **perseverance**. Customary habits do not change from one day to the next.
- Adjusting your behaviour once, does not yet guarantee **sustainable behavioural change** (we call this the action-maintain gap).
- Furthermore, the use of reusable packaging is still at a very early stage. Therefore we do **not just** ask **about actual current behaviour**. This gives insufficient insight and grip on the situation.
- That is why we **also** take **the <u>behavioural intention</u>** into account: to what extent is one inclined to show the desired behaviour (again) in the future?
- Because the required intention often has limited predictive value, we **nuance** this by means of **our commitment model.** If commitment (involvement) is lacking, a positive behavioural intention will not result in **(permanently) changed behaviour.** We call this the intention-behaviour gap and the action-maintain gap.
- We measure commitment in two ways: level of difficulty and importance.
- Based on this commitment, we segment the target group into 6 groups (based on a standardised analysis). **This segmentation answers the question among others: How promising are the chosen behaviours required among the target groups? And what are realistic goals in terms of behaviour?**

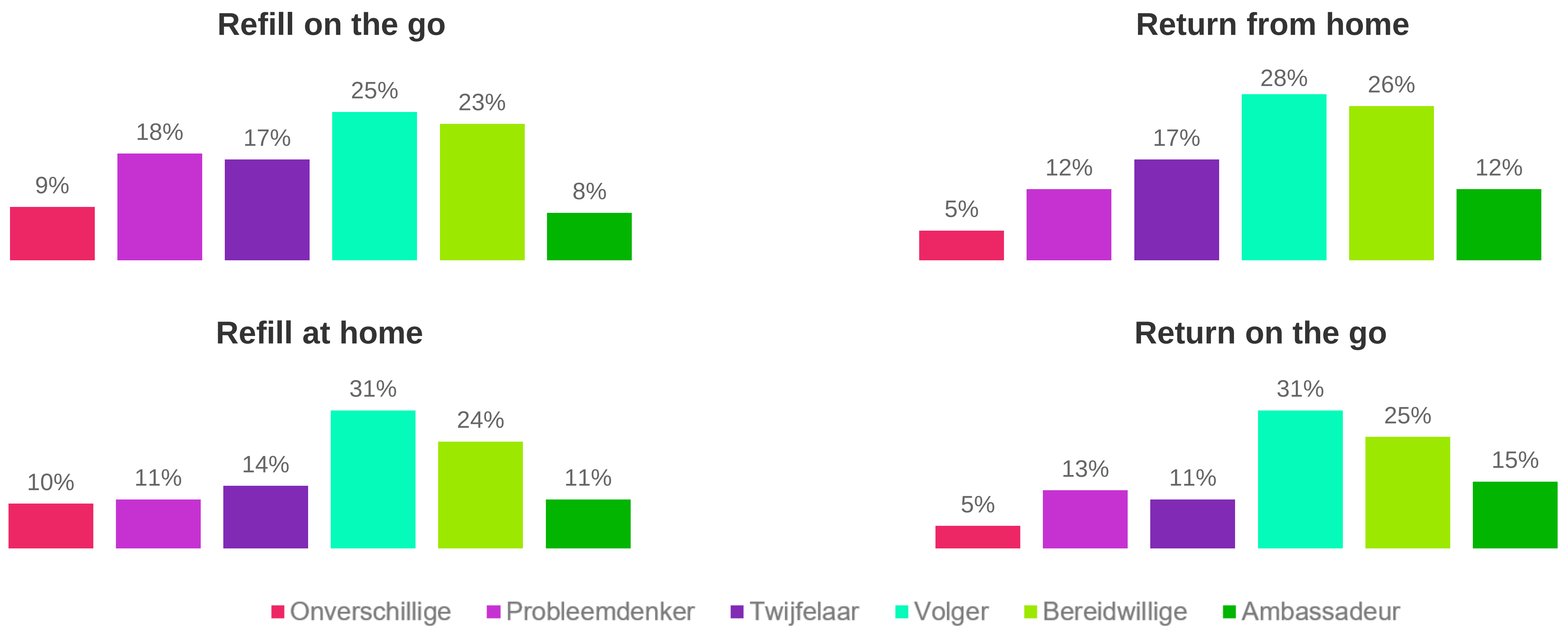


The commitment segmentation shows the distribution for each ‘re-use model’ over the following 6 segments:



The ambassador may be seen in this as the segment with the strongest commitment among the group of people who already show the required behaviour. Their commitment is often so strong that they also try to persuade others. The indifferent person is on the other side of the spectrum and most often (and most stubbornly) displays the undesirable behaviour. They are often not open to any other sound and all the evidence suggests that this is not going to change quickly.

All four reuse models have potential! The segments 'willing person' and 'ambassador' are currently already bigger than 30% for all four and the segments 'indifferent person' and 'problem thinker' are limited

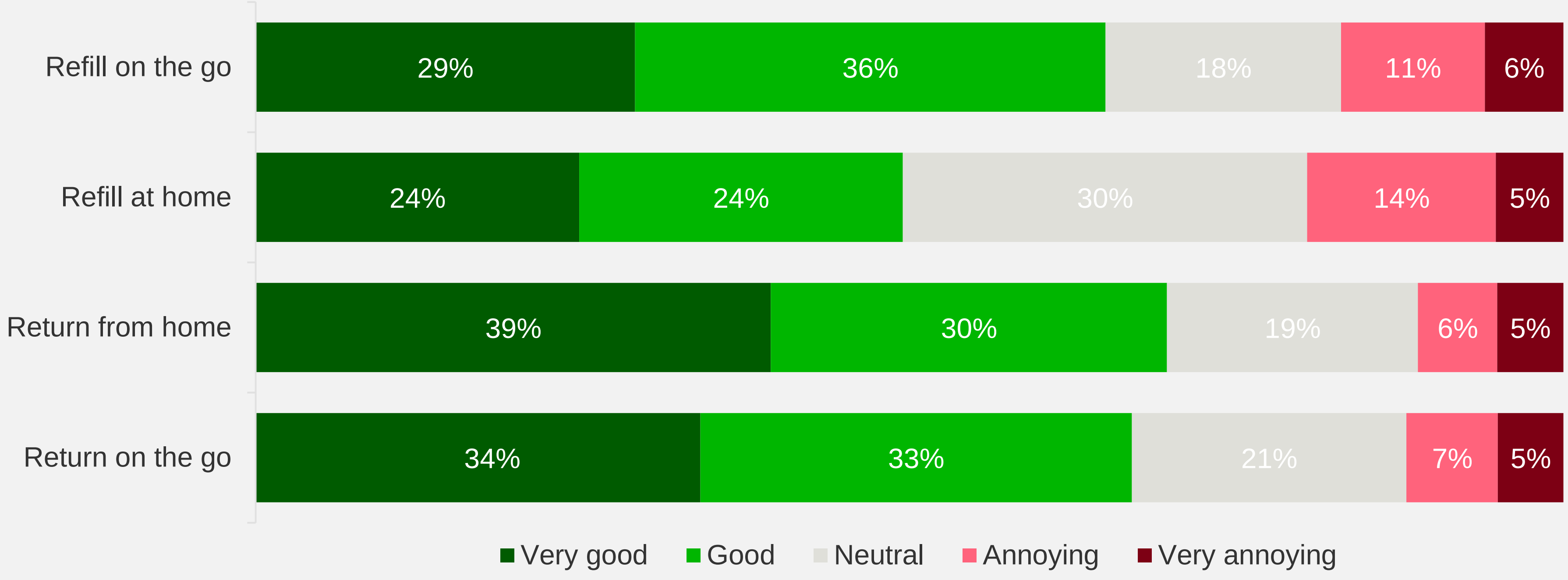


In addition, there already seems to be a very large measure of support for no longer using any disposable packaging and for completely switching to reuse options

With return from home and return on the go there is some resistance; with refill at home there seems to be the most doubt.

Please note: this was only asked regarding the product category found to be most suitable for the reuse model concerned.

If supermarkets only offer the reuse options and no disposable packaging, the following is found...



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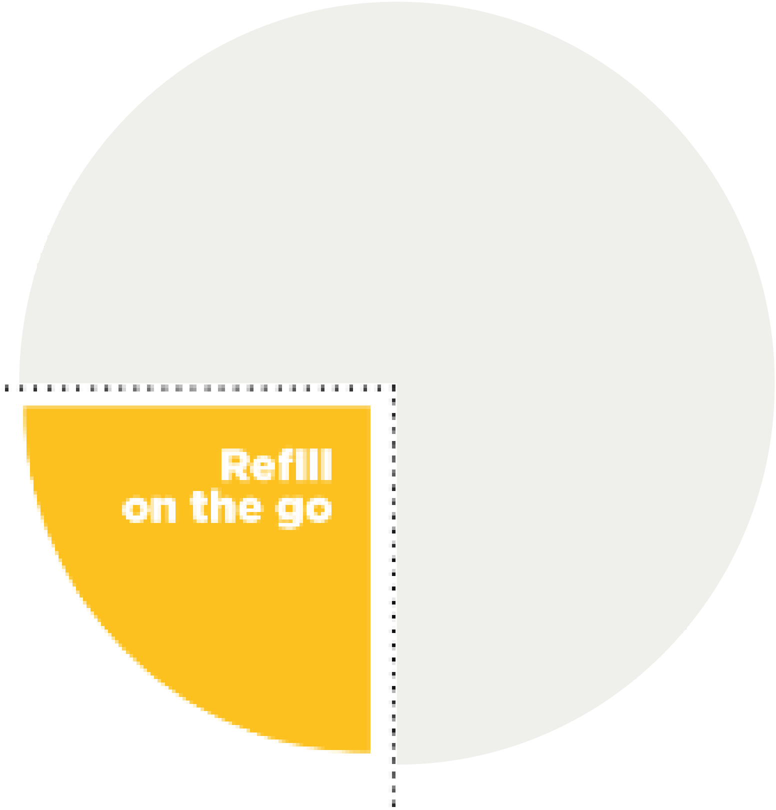
Q012. How would you feel if for <most suitable product> no choice would be offered between pre-packed or fill yourself? Basis n=261| Q025: How would you feel if for <most suitable product> no choice would be offered in the supermarket between concentrated refill products and the usual disposable packaging? Basis n=258
Q038. How would you feel if for <most suitable product> no choice would be offered in the online supermarket between these reusable packaging and the usual disposable packaging? Basis n=242|
Q051: How would you feel if for <most suitable product> no choice would be offered in the supermarket between concentrated refill products and the usual disposable packaging? Basis n=259

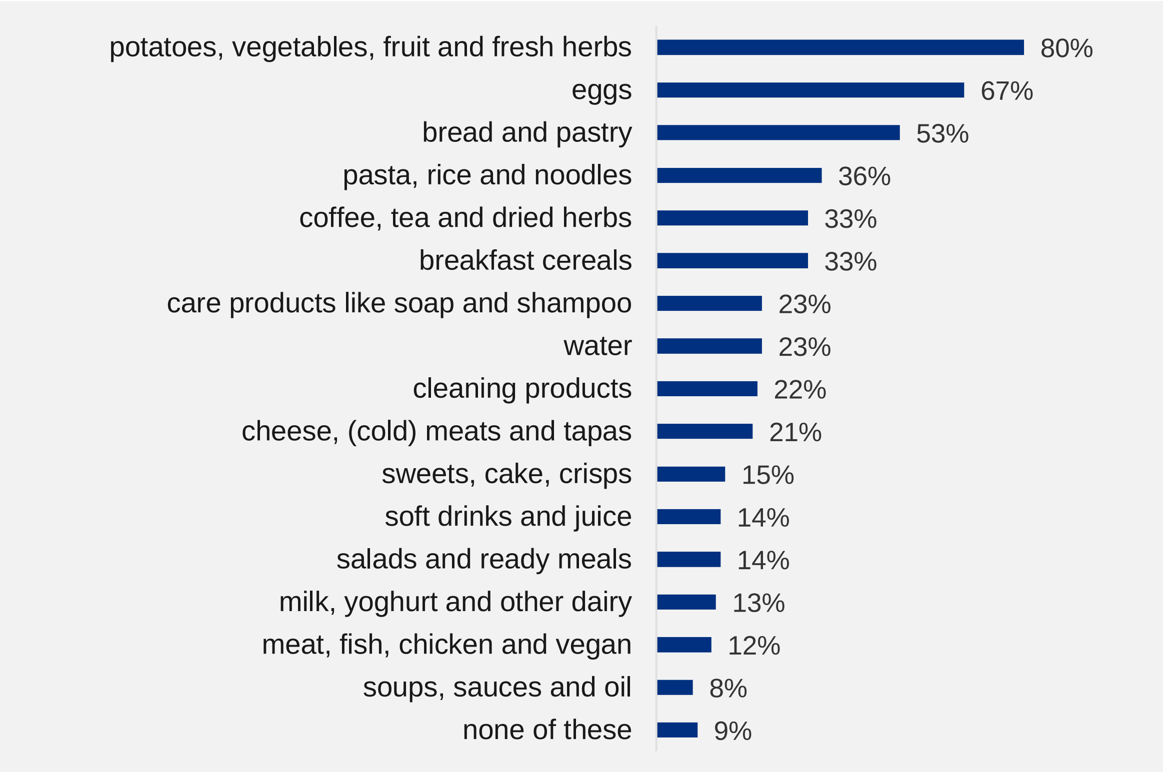
6
Deep dive:
Refill on the go



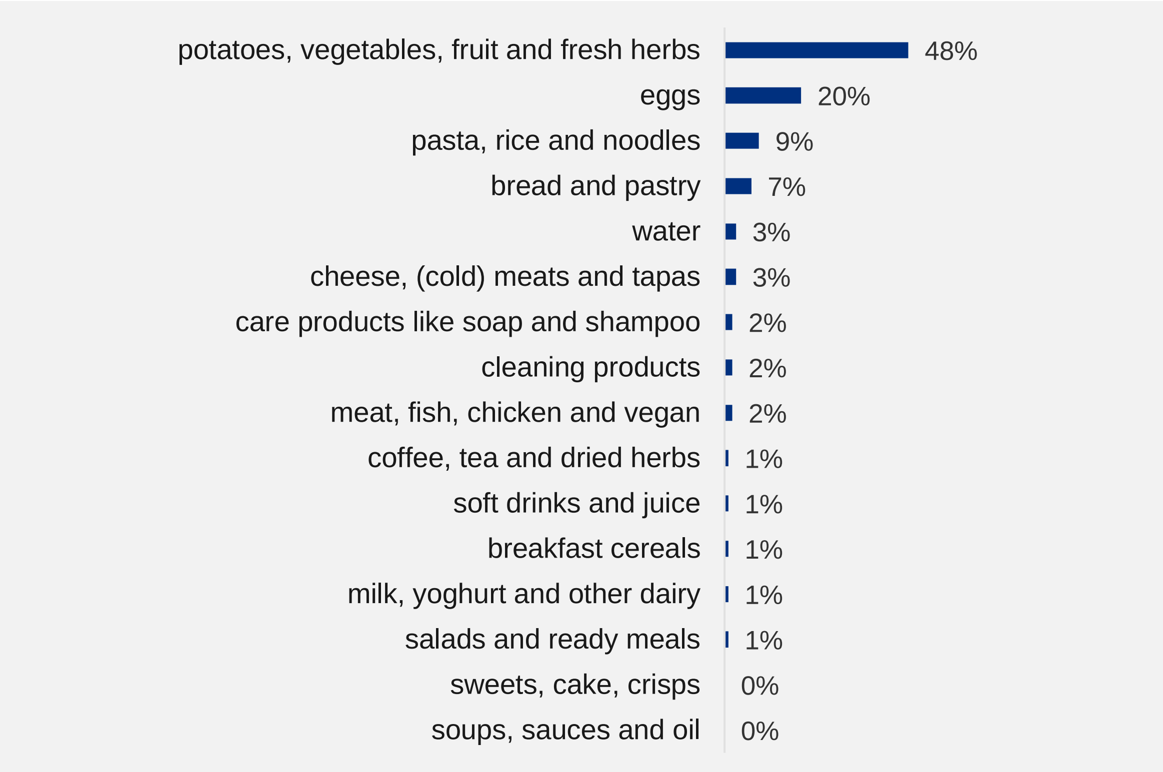
For refill on the go potatoes, vegetables, fruit, fresh herbs and eggs are found to be the most suitable products – but these are definitely not the only suitable products

One third can also see this happening with bread and pastry, pasta/rice/noodles, coffee/tea/dried herbs and breakfast cereals

Suitable products for ‘Refill on the go’
(several answers possible)



Most suitable product for ‘Refill on the go’
(One answer possible)



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Q007. For which of following products is self-filling of your own packaging suitable, in your opinion? Basis n=261

Q008. And for which product is self-filling of packaging most suitable, in your opinion? Basis n=261

Motivations referred to spontaneously are advantages for the environment and better dosage; barriers are about the extra difficulty, hygiene problems and the possible deterioration of the quality and shelf life of products

“Better for the environment, easier to determine your own dosage."

“Less plastic soup.”

“Better for the environment, less use of plastic, more influence on the portions.”

“Adequate hygiene and a good system regarding amount/weight.”

“In many cases bags can only be used once and containers have the disadvantage that they increase the weight. Thus the selling price will also be higher, so you will pay for your own packaging.”

“The amount is much easier to adjust to my personal situation, and for many products you don't even need reusable packaging, like tangerines (which are currently in a net), apples, which are currently in plastic, or a cauliflower for example.”

"Less waste, less use of raw materials. But it will have to be cheaper.”

"It must be possible in a supermarket nearby, I am not going to a supermarket that is much further away to do this.”

"It takes longer to get things in the shop.”

"I don't always have containers or bags with me if I have to do some shopping quickly on the go.”

"Inconvenient, unhygienic, extra costs due to added weight of your own packaging etc.”

"Complicated and dirty hands.”

"Bad hygiene in supermarket, lack of easy storage.”

"If the quality of the products deteriorates, or if shelf life becomes much shorter.”

"Forgot to bring it (spontaneous shopping). Too much lugging around. Extra washing-up.”

Q010. What would (could) be reasons for you to want to make use of this possibility to bring your own reusable packaging (like bags or containers) to the supermarket and fill them? Basis n=261

Q011. What would (could) be reasons for you NOT to want to make use of this possibility to bring your own reusable packaging (like bags or containers) to the supermarket and fill them? Basis n=261

What predicts the desired behaviour the best? In other words: which motivations and barriers must be used to change behaviour?

As indicated at the beginning of this report, we have not just asked respondents to what extent they expect to start showing the desired (reuse model) behaviour. We have also asked them to what extent they recognise themselves in possible reasons (motivations and barriers) actually to start/not start doing this.

We then calculated which of these motivations and barriers have the strongest influence on the intentions whether or not to start showing the desired behaviour.

We did this on the basis of a **stepwise regression analysis**: a statistical method in which it is considered automatically, step- by-step, whether or not to add a variable (in this case motivation or barrier) to a set of explanatory variables, until the set with the strongest predictable value is found (and the adding of an additional variable no longer makes a significant contribution)

On the next slide we show this combination of motivation and barriers (set) which best explain (based on analysis) the desired behaviour. These are the motivations and barriers to which attention must be paid/interventions targeted, in order ultimately to stimulate or enable the desired behaviour.

We also indicate how high the **explained variance** is. With this type of behaviour we use a lower limit of 30% explained variance throughout the model, in other words: an explained variance of more than 30% we regard as sufficiently strong.

In addition, we mention how strong the **correlation coefficients** are. This correlation coefficient indicates how strong the relationship is between the motivation/barrier and the desired behaviour. This states that a correlation always lies between 0 and 1 (positive link) or 0 and -1 (negative link), whereby a rule of thumb is that a correlation greater than 0.5 (or -0.5) is strong and between 0.3 and 0.5 is 'average'.

A positive intention regarding refill on the go is mainly driven by the good feeling that the reuse of packaging gives, the contribution to the environment and the fact that one is already used to it with other products

The most important obstacles are the trouble experienced in bringing your own packaging and the belief of (some) people that it does not suit them

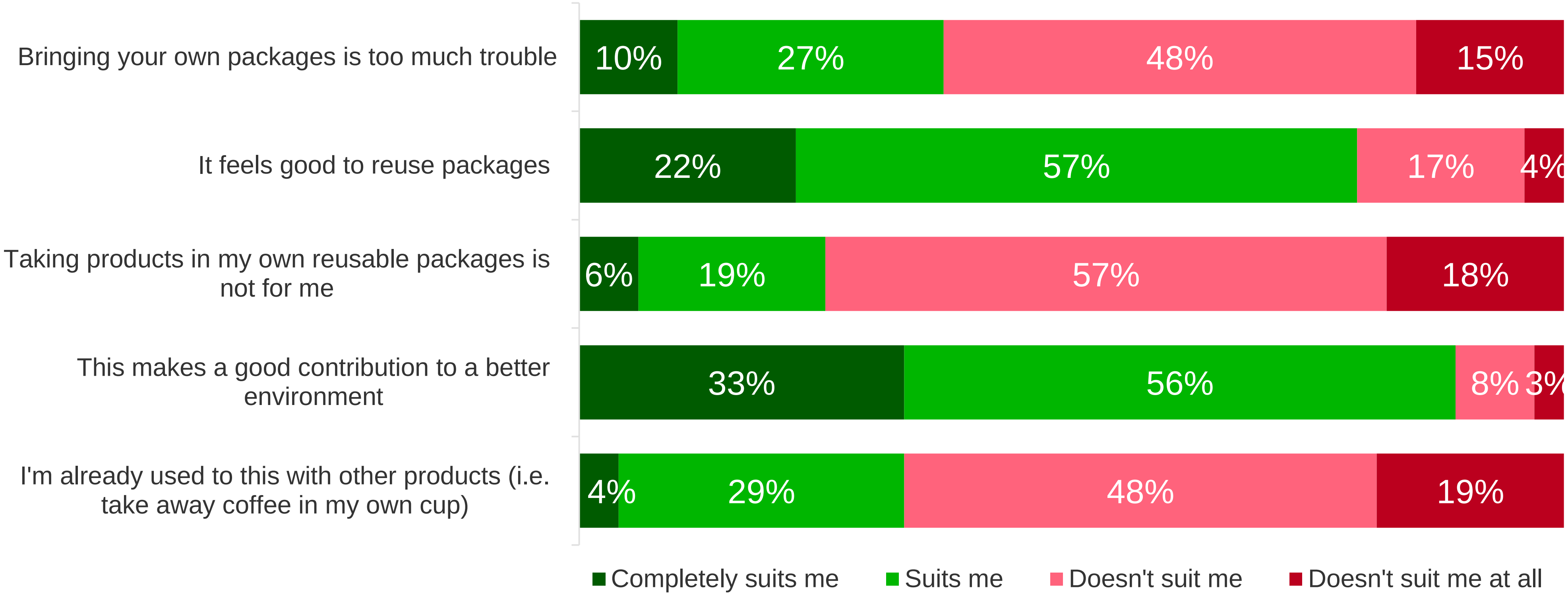
1. Bringing your own packaging is too much effort
2. It feels good to reuse packaging
3. Taking products in my own reusable packaging is not for me
4. This makes a good contribution to a better environment
5. I'm already used to this with other products (i.e. take-away coffee in my own cup)

These **five motivations and barriers** together explain **53% of the variance** in the intention to use (strong).

They are in order of importance: in other words, the motivation or barrier at the top has the greatest impact on the intention to use and therefore is the most important. All five motivations and barriers within this model have a correlation coefficient between r= 40 and r= 62.

37% experience the most impactful barrier *(takes a lot of effort)*, at the same time the most important motivation holds true for nearly 8 out of 10 *(feels good)*

Instated recognition of motivations and barriers that have the most impact



Q015 t/m Q018: There are various reasons why people think it's a good idea (Q015 andQ016)may have difficulty with (Q017 and Q018) filling your own packaging at the supermarket. We will now show you a few of these reasons. How well do the following statements fit with you? | Basis: respondents who were given the scenario 'refill on the go', n=261

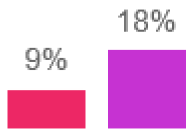
Characteristics of the refill on the go commitment segments

When looking at the background characteristics of the various segments, the following stands out (note: differences are often not significant, because the groups are relatively small). Moreover, the ambassadors and the willing persons have been combined, the followers and doubters have been combined and the problem thinkers and indifferent persons have been combined, in order to produce a somewhat larger sample for each group.

Refill on the go seems the most promising among women, people with a higher level of education and the group of people over 55 years old.

Note: these results are based on relatively small sub-groups and must therefore be interpreted with some caution.

Problem thinkers + indifferent people



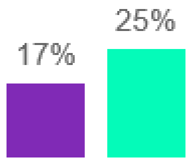
n=58

Relatively many men (61%, no sign.)

Slightly more often 18-34 years old (24%, no sign.)
39% are 55 years or over

Less often highly educated than both other groups (26%, significant)

Followers + doubters



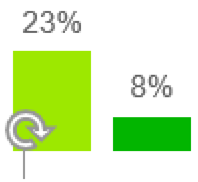
n=117

46% men

20% are 18-34 years old
39% are 55 years or over

Less often highly educated than ambassadors/willing people (41%)

Ambassadors + willing people



n=86

43% men

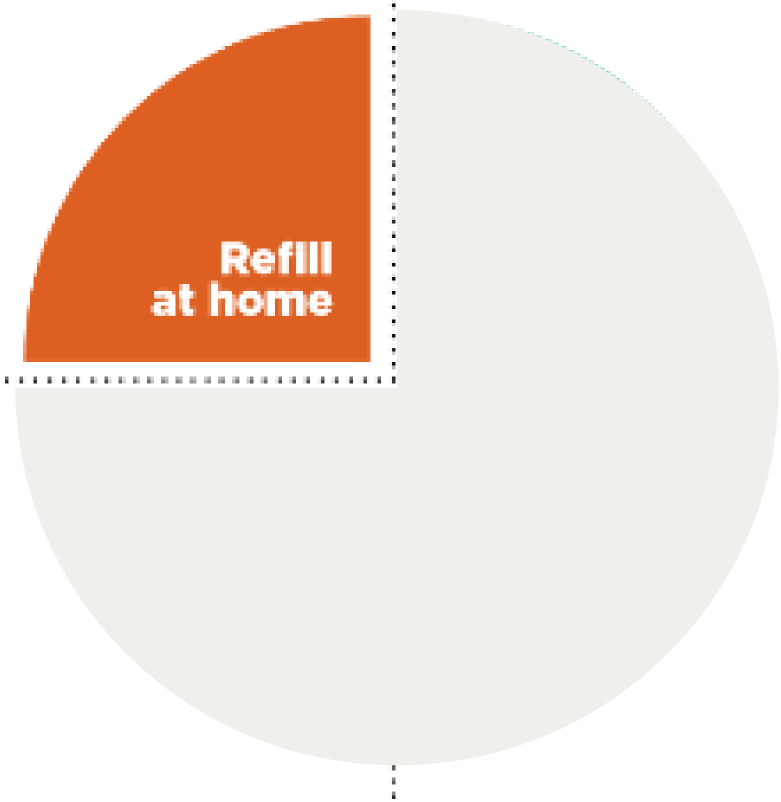
15% are 18-34 years old
Slightly more often 55 years and over (54%, no sign.)

Significantly more often highly educated than the other groups (59%)

7

Deep dive:

Refill at home



For refill at home cleaning products are found to be most suitable, but care products also have a high score

Suitable products for 'Refill at home'
(several answers possible)

Q020. For which of the following products is this refilling at home of packaging suitable, in your opinion? Basis n=258

Most suitable product for 'Refill at home'
(just one answer possible)

Q021. And for which products is this refilling of packaging at home most suitable, in your opinion? Basis n=258

Motivations mentioned spontaneously are environmental benefit, less transport and storage space and determining your own dosage. The barriers involve the extra work, mess and possible inferior quality/difficulty in getting the proportion right

"Eco-friendlier and less heavy (lugging)."

"Less storage space, good for the environment."

"Less plastic, better for the environment and less waste at home."

"Less wastage of packaging, car emissions for transport."

"It is more sustainable, because you save on waste and use of material for packaging."

"The fact that you can determine the concentration yourself."

"No needless weight during transport, little space in the cupboard and shopping basket, less waste, better for the planet."

"It's easier to take with you on the bicycle/in the bag.The waste mountain is decreasing. Fewer transport costs. Cheaper products."

"Consciously use less packaging material. Is better for the environment."

"Unintentionally use more."

"It's a bit more work, so laziness."

"Hassle and quality."

"Expiry date."

"Refilling can sometimes be messy."

"If it's not practical, the refilling."

"No good proportions any more."

"If the product is more expensive than the usual packaging."

"Mess at home. Spill. Original is broken (think of soap dispensers)."

"It's still packed in plastic, I can also opt for an eco-friendlier alternative like soap in a bar or lemonade in an aluminium or glass bottle."

"The quality which deteriorates."

Q023. What could (would) be reasons for you to buy such a concentrated version of a product with which you can refill your packaging at home? Basis n=258

Q024. What could (would) be reasons for you NOT to buy such a concentrated version of a product with which you can refill your packaging at home? Basis n=258

A positive intention regarding refill on the go is mainly prompted by the good feeling that the reuse of packaging gives, the contribution to the environment and the fact that one is already used to it with other products and the impact of the social surroundings. Having to clean packaging can be a barrier.

1. This makes a good contribution to a better environment
2. It feels good to reuse packaging
3. I don't feel like having to clean/wash the refillable packaging before refilling it
4. I'm already used to this with other products
5. People around me think it is important to reduce waste
6. I can then buy an extra handy or nice refillable container (i.e. small bottle, pump, vial) to refill time and again with the concentrated version of the product

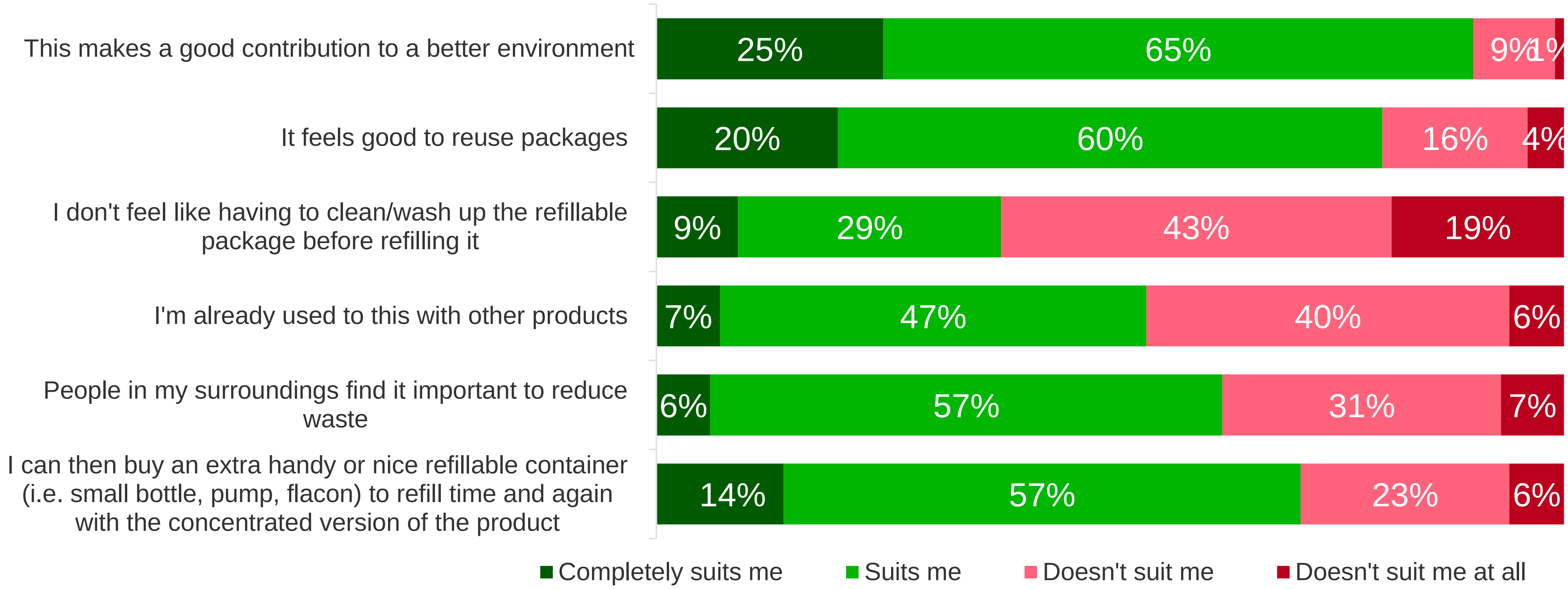
These **6 motivations and barriers** together **explain 56% of the variance** in the intention to use (strong).

They are in order of importance: in other words, the motivation or barrier at the top has the biggest impact on the intention to use and therefore is the most important. All six motivations and barriers within this model have a correlation coefficient between r= 48 and r= 63.

For an explanation of the underlying analysis, click here.

9 out of 10 currently state that they already experience the most important motivation (good contribution to a better environment); 38% recognise themselves in the barrier (don't feel like cleaning)

Instated recognition of motivations and barriers that have the most impact



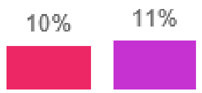
Characteristics of the refill at home commitment segments

When looking at the background characteristics of the various segments, the following stands out (note: differences are often not significant, because the groups are relatively small). Moreover, the ambassadors and the willing persons have been combined, the followers and doubters have been combined and the problem thinkers and indifferent persons have been combined, in order to have a somewhat larger sample for each group.

Refill at home seems to be the most promising with consumers who are a bit older, do not have any children living at home and/or are not (no longer) employed. For families with children in which the parents are employed, the barrier seems higher. We see this group more often with the problem thinkers and indifferent people.

Note: these results are based on relatively small sub-groups and must therefore be interpreted with some caution.

Problem thinkers + indifferent people



n=46

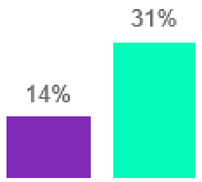
24% are 55 years old or more

More often live in households of 3 people or more (60%)

Significantly more often households with children under 18 years old (38%)

Slightly more often employed people (63%, no sign.)

Followers + doubters



n=126

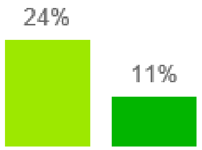
38% are 55 years old or more

35% live in households of 3 people or more

13% households with children <18 years old

56% are **employed**

Ambassadors + willing people



n=86

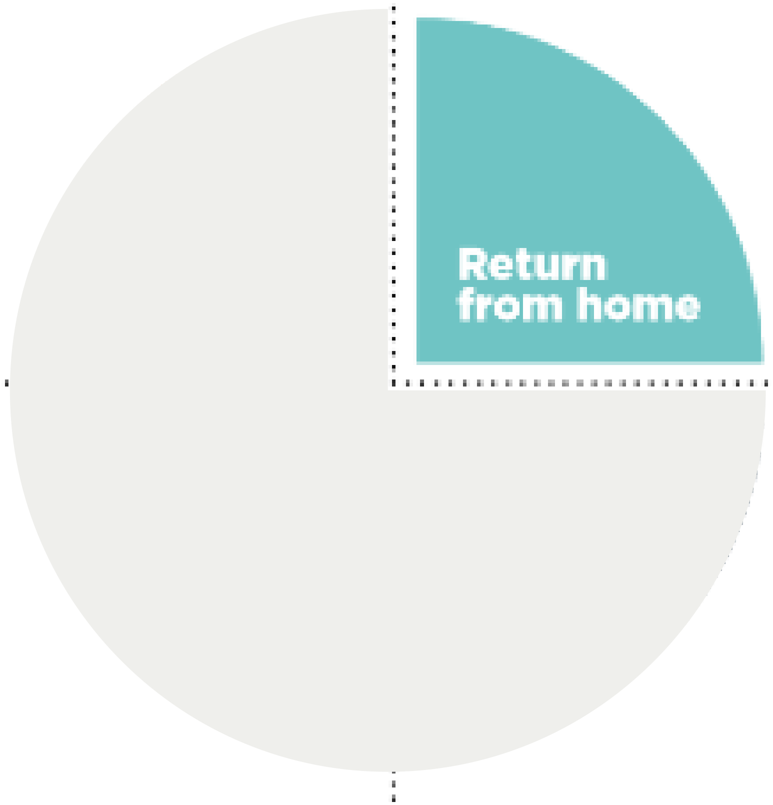
Significantly more often 55 years old and more (46%)

40% live in households of 3 people or more

18% households with children <18 years old

48% are employed

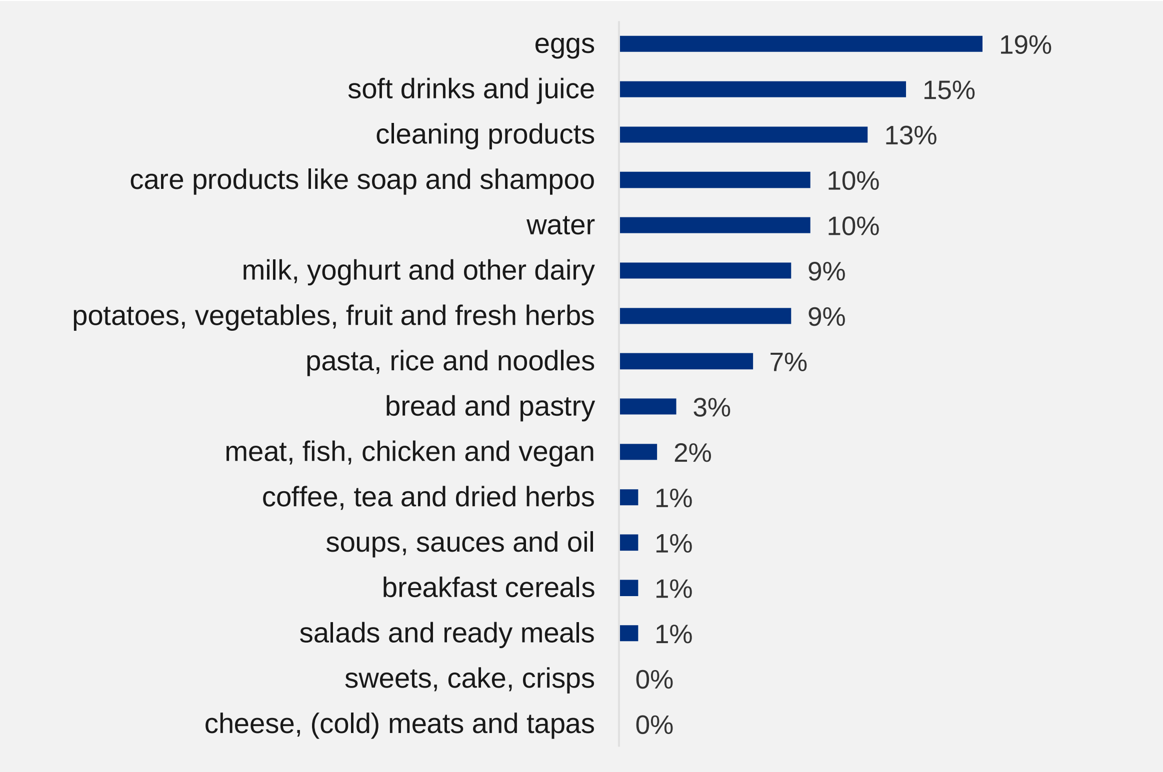
8
Deep dive:
Return from home



For return from home there is less clarity about what is the most suitable product, but eggs, soft drinks, juice and cleaning products are most often classed as most suitable. The good news is that many different products are felt to be suitable.

Suitable products for ‘Return from home’
(several answers possible)

Most suitable product for ‘Return from home’
(just one answer possible)



Q033. For which of following products would this collection of empty packaging be suitable, in your opinion? Basis n=242

Q034. And for which products is this collection of empty packaging most suitable, in your opinion? Basis n=242

Motivations mentioned sspontaneously are once again the environmental benefit and that it makes products cheaper The barrier is mainly seen in off-line ordering, being bound to collection times and the condition that you have to keep the (smelly) packaging at home

“Better for the environment, the feeling that I do my bit for a better world.”

“Less needless waste.”

“That it will actually be cheaper.”

“More economical and eco-friendlier.”

“Reuse is less burdensome for the environment.”

“Reducing the use of raw materials.”

“Less waste. Plastic container is incredibly full each week.”

“I think cleaning products are fine to put in a kind of deposit packaging, for me it wouldn't even have to be collected. It can be returned as we currently do with soft drinks bottles etc.”

“If my favourite shampoo were to offer that for a reasonable price.”

“Too much hassle, time-consuming, taking things into account too much.”

“I prefer doing my shopping off-line.”

“Time, I will have to plan yet another appointment. I would rather return them to a central point at a time that suits me.”

“Space to store everything.”

“Collection times, for example, are too limited.”

“If it feels unhygienic.”

“Even more junk you have to keep at home and separate (like plastic hero/paper once a month at present).”

“Preferred brand or type of choice not packaged as such.”

“Smelly packaging that you have to clean first because otherwise they will walk off by themselves.”

Q036. What would (could) be reasons for you to opt for this reusable packaging and have the empty packaging collected? Basis n=242

Q037. What would (could) be reasons for you NOT to opt for this reusable packaging and have the empty packaging collected? Basis n=242

The intention to make use of return from home is mainly encouraged by the feeling that it contributes to a better environment, but having to keep the packaging and having to stay at home when it gets collected have a strongly limiting impact

1. Keeping and returning empty packaging is not my thing
2. It's inconvenient to have to stay at home to wait for the person collecting it
3. This makes a good contribution to a better environment
4. I don't believe that using reusable packaging makes a difference to the environment

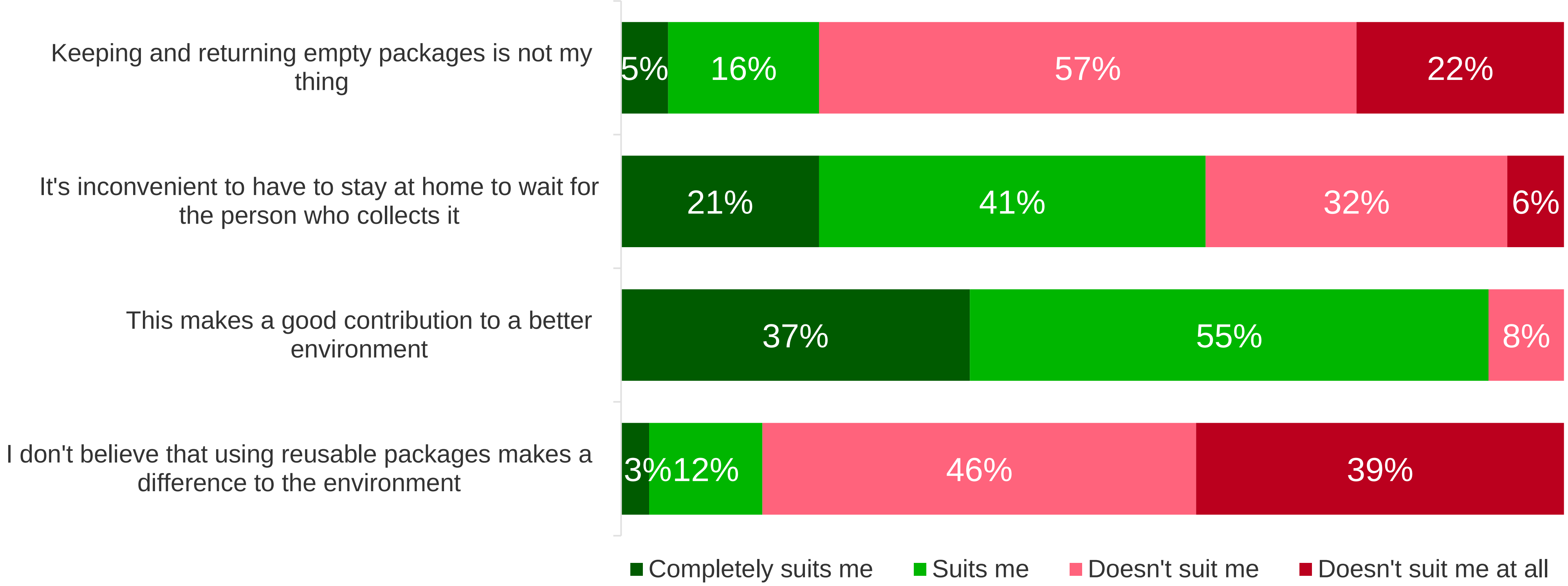
These **4 motivations and barriers** together explain **36% of the variance** in the intention to use). They are in order of importance: in other words, the motivation or barrier at the top has the biggest impact on the intention to use and therefore is the most important. All four motivations and barriers within this model have a correlation coefficient between r= 33 and r= 53.

For an explanation of the underlying analysis, click here.

* Compared to the explanatory models for the other three reuse models, the explained variance of this model is a lot lower. The motivations and barriers included in this research seem to explain the behavioural intention to a lesser degree in comparison with the other reuse models,, but it still gives a fairly good indication.

The barrier ‘it's inconvenient to have to stay at home to wait for the person collecting it’ is recognised by a large group (>6 out of 10)

Stated recognition of the motivations and barriers that have the most impact



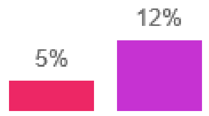
Characteristics of the return from home commitment segments

When looking at the background characteristics of the various segments, the following stands out (note: differences are often not significant, because the groups are relatively small). Moreover, the ambassadors and the willing persons have been combined, the followers and doubters have been combined and the problem thinkers and indifferent persons have been combined, in order to have a somewhat larger sample for each group.

Return from home seems to be the most promising with women, the more highly educated and residents of the western part of the Netherlands. In the regions east and south and among the youngest target group (18-34) this reuse model seems to be slightly less appreciated.

Note: these results are based on relatively small sub-groups and must therefore be interpreted with some caution.

Problem thinkers + indifferent people



n=43

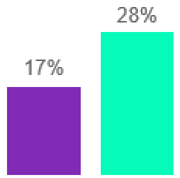
Slightly more often men (58%, no sign.)

Significantly more often 18-34 years old (39%.)

Less often highly educated than both other groups (28%, no sign.)

Live significantly more often live in the regions east and south (27% and 36%), less in the west (15%)

Followers + doubters



n=109

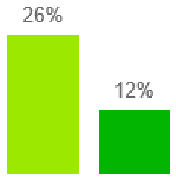
Slightly more often men (58%, no sign.)

29% are 18-34 years old

48% are highly educated

16% lives in the east, 31% in the south, 28% in the west

Ambassadors + willing people



n=80

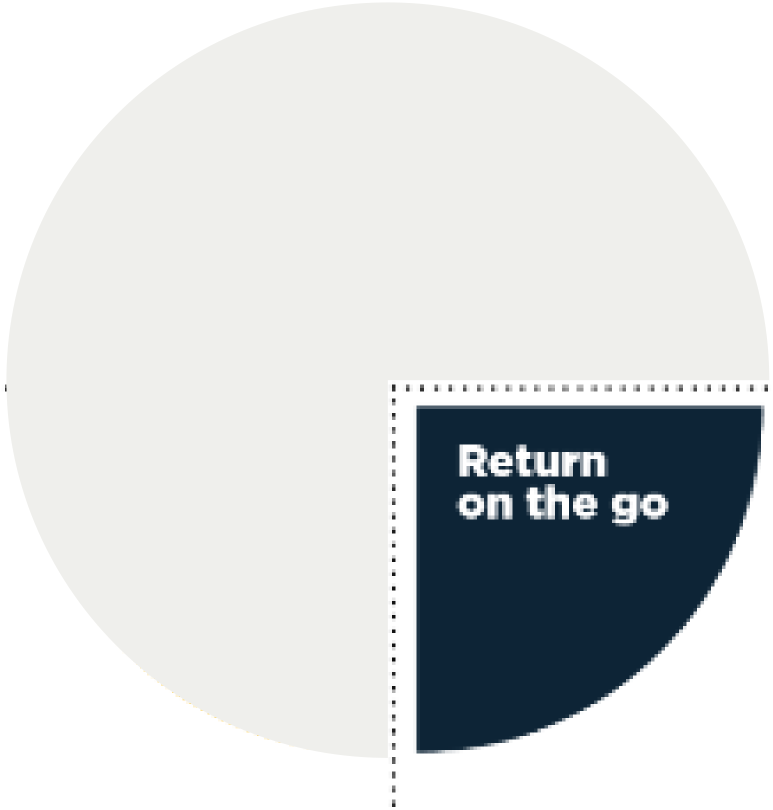
Slightly more often women (54%, not sign.)

16% are 18-34 years old

44% are highly educated

Live less in the regions east and south (17% and 24%) and relatively often in the west (33%)

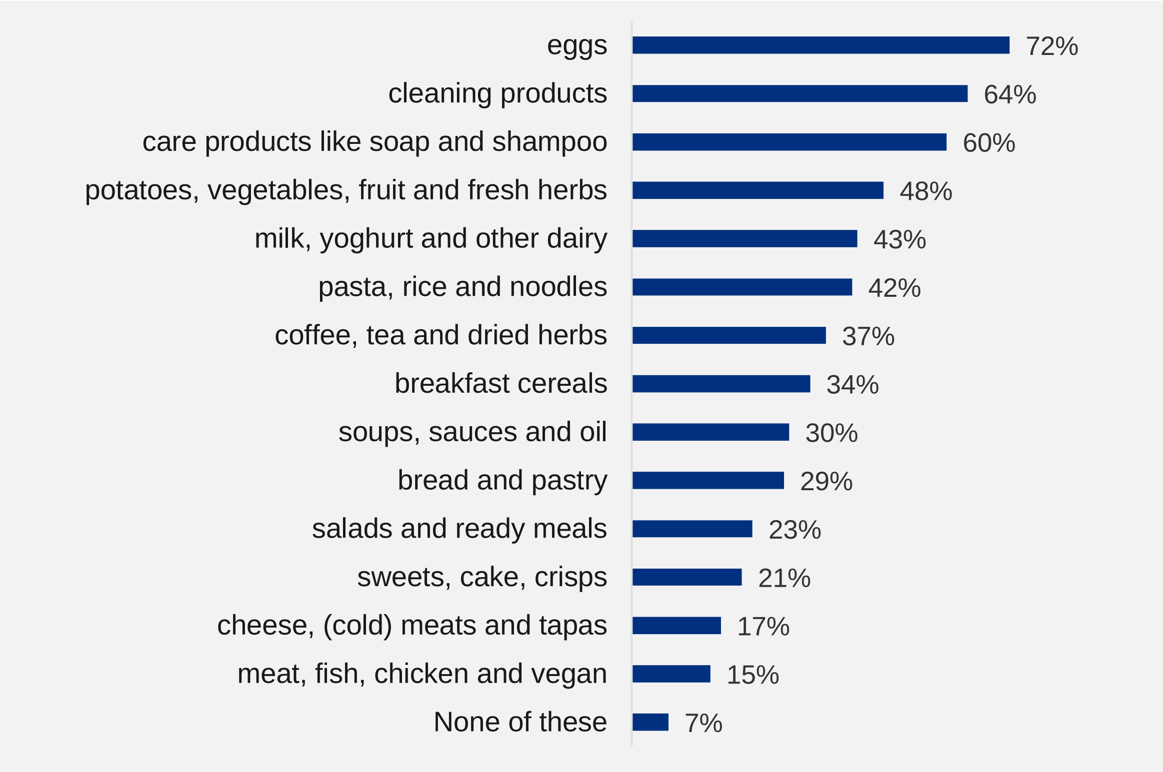
9
Deep dive: Return on the go



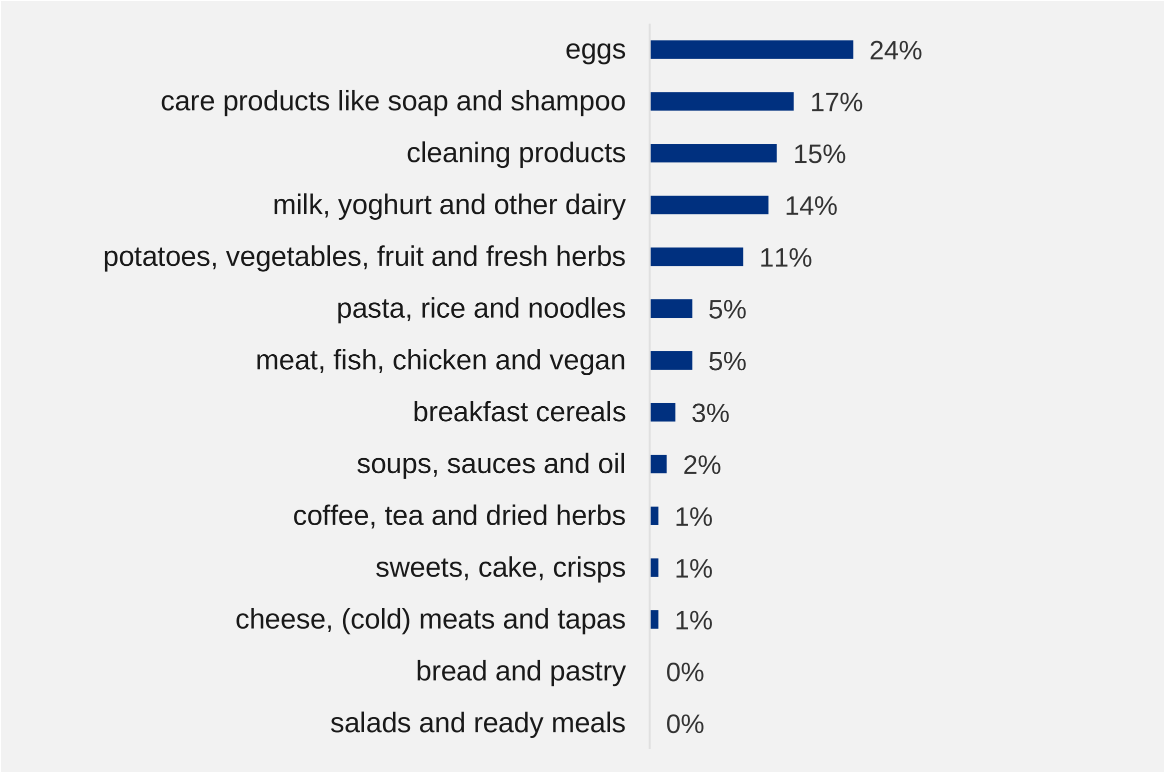
Return on the go are found to be the most suitable for eggs, but care and cleaning products as well as dairy do not have a much lower score

Just as with return from home we see that this reuse model is seen in any case as suitable for many products

Suitable products for ‘Return from home’
(several answers possible)



Most suitable product for ‘Return from home’
(just one answer possible)



Q046. For which of the following products would this possibility to return empty packaging be suitable, in your opinion? Basis n=259

Q047. And for which of the following products is this collection of empty packaging most suitable, in your opinion? Basis n=259

Motivations mentioned spontaneously are environmental advantages and recent experiences. However, the fact that it takes a bit more effort to keep and return packaging is seen as a barrier and some find it less hygienic.

“Better for the environment and you get a deposit.”

“Less waste, better for the environment.”

“Less wastage of raw materials.”

“Environmentally friendly, it’s possible with soft drinks, then why not with dairy.”

“This way I’m more environmentally aware and engaged.”

“Sustainability. The negligent way in which we consume without any thought about reducing it. Physically: eggs can easily be put in cleaned (although that's not really necessary) reused packaging. We used to do this without any problems in the past: buy eggs from the egg farmer and bring your own box to put them in. This is better for the environment, cost-saving, and it reduces waste. I don't see any big obstacles for not doing so.”

“Reuse, less environmental pollution.”

“It takes a little effort, it's easier to throw things away.”

“Packaging, that breaks quickly or gets dirty.”

“The hassle of having to return things again.”

“Instinctively grubby.”

“Fear that the cleaning is not done properly.”

“Bothersome, packaging quickly breaks or gets dirty. So, hygiene.”

“Don't feel like keeping (things), gives too much mess.”

“Too much work for supermarkets.”

“If I'm told that the company ultimately doesn't follow up on it.”

“Very cumbersome to have to keep a lot of deposit packaging and subsequently redeem them.”

“If the product gets much more expensive because of it.”

Q049. What would (could) be reasons for you to opt for this reusable packaging and have the empty packaging collected? Basis n=259

Q050. What would (could) be reasons for you NOT to opt for this reusable packaging and have the empty packaging collected? Basis n=259

A positive intention regarding return on the go is encouraged mainly by the good feeling that it gives and the contribution to the environment. Having to keep and bring empty packaging and possible limited choice between brands have the strongest limiting impact. Finally, hygiene also seems to play a limiting role.

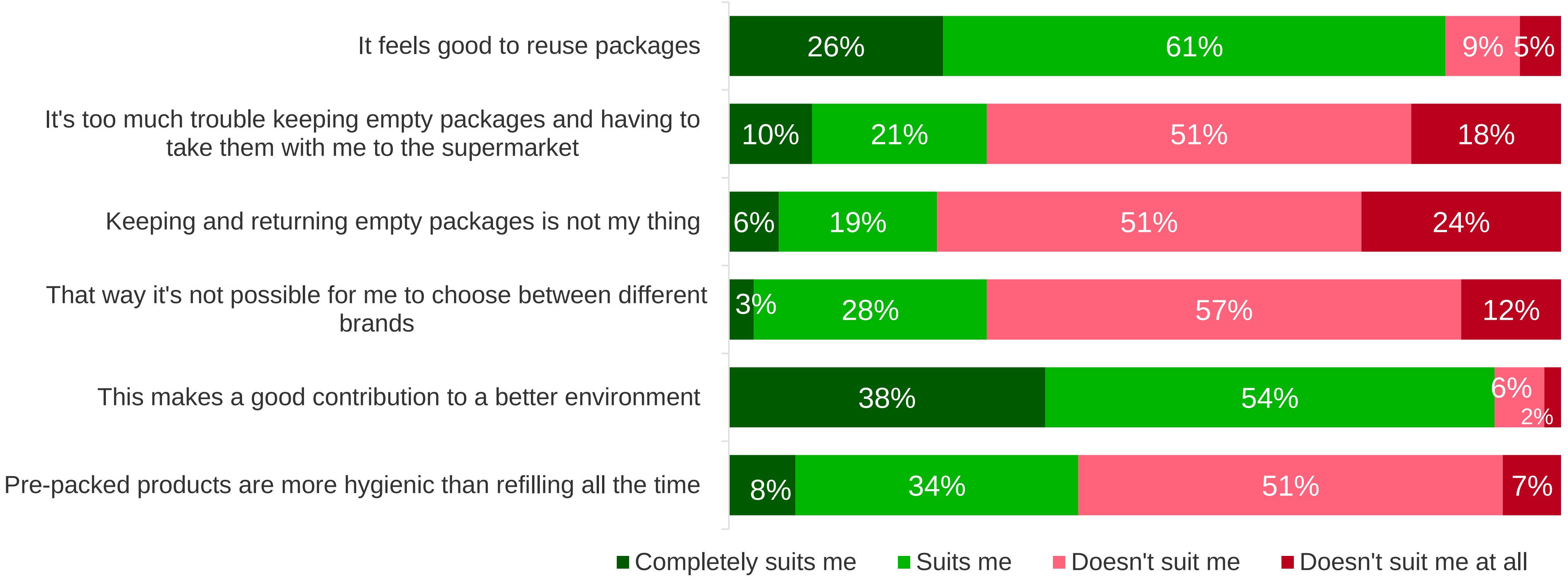
1. It feels good to reuse packaging
2. It's too much trouble keeping empty packaging and having to take it with me to the supermarket
3. Keeping and returning empty packaging is not my thing
4. It's not possible for me to choose between different brands
5. This makes a good contribution to a better environment
6. Pre-packaged products are more hygienic than refilling all the time

These **6 motivations and barriers** together explain **54% of the variance** in the intention to use (=strong).

They are in order of importance: in other words, the motivation or barrier at the top has the biggest impact on the intention to use and therefore is the most important. All six motivations and barriers within this model have a correlation coefficient between r= 12 and r= 61.
For an explanation of the underlying analysis, click here.

The four barriers shown are experienced by more than a quarter; On the other hand, the two motivations are experienced by more than 85%

Stated recognition of the motivations and barriers that have the most impact



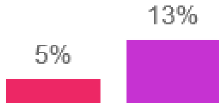
Characteristics of the return on the go commitment segments

When we look at the background characteristics of the various segments, the following stands out (note: differences are often not significant, because the groups are relatively small). Moreover, the ambassadors and the willing persons have been combined, the followers and doubters have been combined and the problem thinkers and indifferent persons have been combined, in order to have a somewhat larger sample for each group.

Return on the go seems to be somewhat more promising with women than with men and with people aged 55 and over, furthermore we don't see any clear differences regarding background characteristics.

Note: these results are based on relatively small sub-groups and must therefore be interpreted with some caution.

Problem thinkers + indifferent people

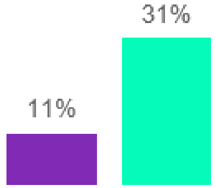


n=44

Slightly more often men (61%, no sign.)
39% women

39% is 18-34 years old
Relatively many men (26%, not sign.)

Followers + doubters

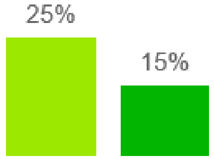


n=111

39% men
61% women

33% are 18-34 years old
33% are over 55

Ambassadors + willing people



n=104

46% men
54% women

Relatively few 18-34 year olds (19%, no sign.)
43% are over 55

Apart from that, no significant differences found regarding background characteristics.

10
Impact on reputation of supermarkets

Nearly 4 out of 10 state that they start to find a supermarket more attractive when it offers more opportunities for buying products with less disposable packaging than other supermarkets

Just a small proportion of consumers thinks this makes a supermarket less attractive

If supermarkets offer more opportunities for reuse/less disposable packaging, it makes them ...

This answer is given significantly more often by people within higher social classes (46%) and highly educated people (54%). We don't see any differences regarding gender or age.

People from a middle or low social class answer relatively often that it does not make any difference (54% and 63%). That also holds true for people with an average or low level of education (55% and 57% respectively).

Q058. Imagine that a supermarket offers more opportunities than other supermarkets to buy products with less disposable packaging. For example, the possibility of filling your own bag or container or to return empty packaging for reuse. Does that make this supermarket more attractive,/less attractive to you or does it not make any difference? Basis n=1020

It is appreciated when supermarkets show that they are making a contribution to the environment

“Then you actually experience a supermarket thinking about the environment.”

“The feeling of being personally active for the environment.”

“It shows that they think it is important to reduce waste.”

“It shows commitment to a major problem we all need to be working on.”

“Aware and up-to-date, making it easier for the consumer to live with greater awareness.”

“At least they are really doing something about the problem.”

“They work in an environmentally-aware way, which is very important to me.”

“Because it is more in keeping with my ideas and wishes regarding products.”

“Yes, duh, this curbs waste of raw materials.”

“The choice to actually do it and it shows that the supermarket is engaged with what is going on in society.”

“That supermarket is acting with greater awareness.”

Q063. Why does this make a supermarket more attractive to you? Basis: people who feel it makes a supermarket more attractive if it offers more possibilities than other supermarkets to buy product greater awareness disposable packaging n=368

People who think that a supermarket becomes less attractive by offering reuse options, expect it to be very inconvenient and to take extra time

“Everyone can touch it.”

“Having to drag your own containers around, what a hassle.”

“Because different people are always rummaging around in that product.”

“Long queues, waiting times, discussion at the till.”

“Hygiene, lugging full bags around.”

“It's no longer just simply throwing it in your shopping trolley and going.”

“Will be chaos.”

“I want to choose for myself. The environment-mob is panting enough around my neck as it is.”

“Too much hassle.”

“Extra work that’s just not worth it.”

“Too much hassle.”

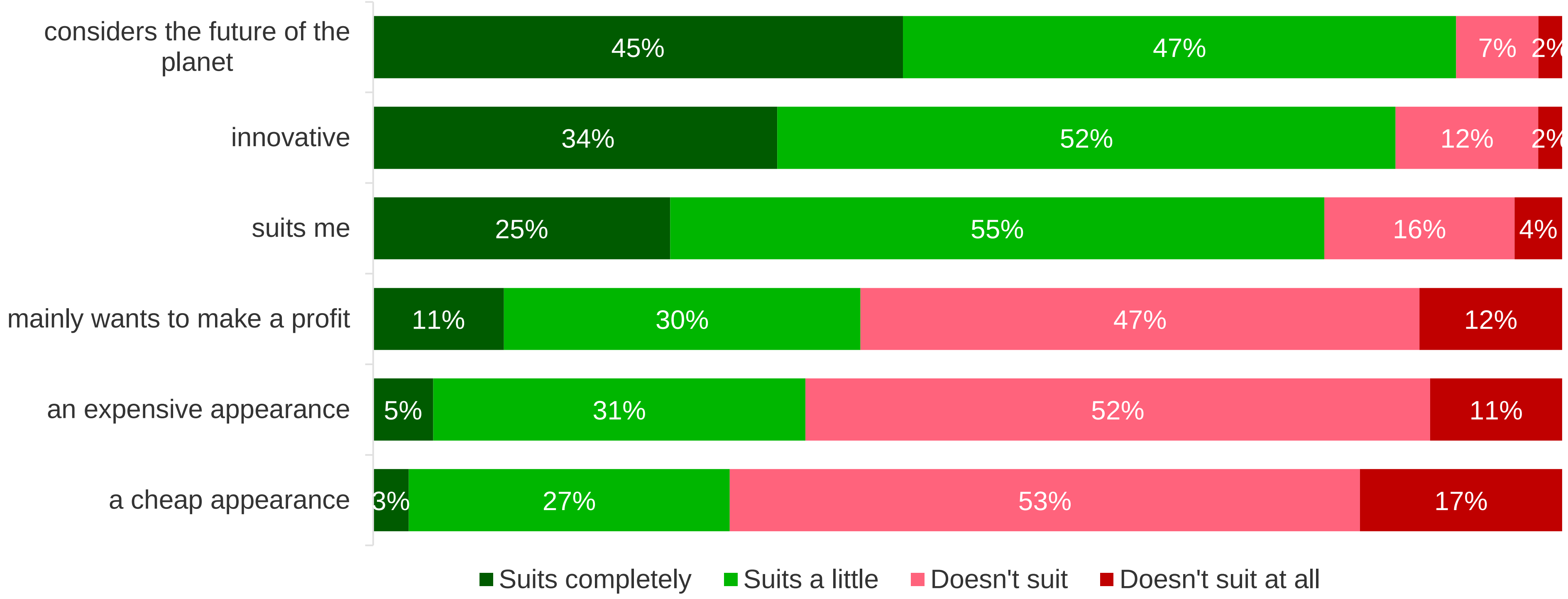
“Extra work with few rewards.”

“So you’ll go to the supermarket with an shopping bag full of empty packs and back home again with a bag of full packages, I dread to think about it – you’d have to bring yet another shopping trolley to and from your home.”

Q063. Why does this make a supermarket less attractive to you? Basis: people who feel it makes a supermarket less attractive if it offers more opportunities than other supermarkets to buy products with less disposable packaging ,n=71

Supermarkets that pay a lot of attention to reducing disposable packaging are viewed by (more than) 8 out of 10 people as *considering the future of the planet, innovative* and that *suits me*

Impact on reputation if supermarket is committed to reducing disposable packaging

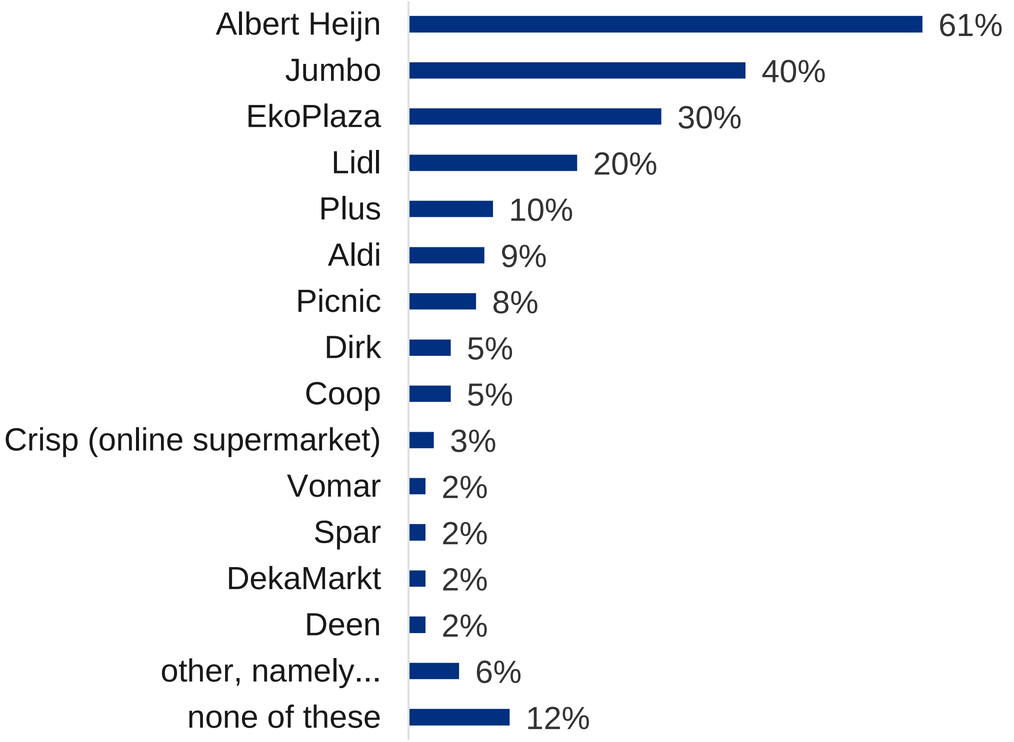


KANTAR PUBLIC

Q059. Imagine that a supermarket pays a great deal of attention to reducing disposable packaging of its products. And for example, offers many opportunities for filling your own bag or container or tor returning empty packaging for reuse. How fitting do you find the following words for such a supermarket? Basis n=1020

People usually thing that 'being involved with reducing disposable packaging' suits Albert Hein, followed by Jumbo and Echoplanar

Being involved with reducing disposable packaging suits...



Q060. One supermarket spends more attention to reducing packaging material of its products than others. With which supermarket do you feel it's fitting to be committed to reducing disposable packaging? (You can give a maximum of 3 answers) Basis n=1020

Sub-study 2- supermarkets

Reading guide for this sub-study

01

This part of the report shows the results of qualitative research. These are based on discussions with branch managers and managers at head office level. The insights described and quotes are based on the findings that we have heard from both groups combined, therefore these are not mentioned as separate groups.

02

Where we mention 'all supermarkets', we mean all supermarket chains that we have talked to for this research (also see the research specifications)

03

In the report we sometimes point out differences between service supermarkets and discount supermarkets. Discount supermarkets are Aldi, Lidl and Vomer in this case. The other supermarkets from the research come under the service supermarkets.

11
Current knowledge, attitude and behaviour supermarkets

Current knowledge, attitude and behaviour: every supermarket is involved in sustainability and thinks it is important

Each supermarket has **goals** in the area of sustainability and packaging (and in any case they have all signed the Plastic Pact)

People see that it's **increasingly important** to be involved in this as a supermarket.

Most supermarkets do a lot to **reduce the amount of plastic packaging material** for each product. Much attention is also paid to the use of **recyclable** material. **Reuse options**, except refillable bags for fruit and vegetables (and sometimes bread) are **relatively uncommon**.

One of the supermarkets also indicates **reuse must be looked at an overall that goes beyond categories**, while recycling can be tackled at category level. This therefore requires actual commitment by the organisation at a high level.

Furthermore, it is important to know that all supermarkets state they only **focus** their attention on reusable packaging **on their own (private brand)** including fresh products such as vegetables, fruit, meat/fish and bread). They have scarcely any influence on the packaging of quality brands.

Supermarkets care about sustainability in the area of packaging. At the same time, focusing on reuse options seems to be at quite an early stage for most of them.

"Previously packaging policy was implemented by the individual categories within the Purchasing department. Currently we are working towards a special department that has responsibility for the entire packaging policy. This department will model the substantive policy, but will also structure the internal processes in such a way that we will make good decisions that exceed the product group."

"An enormous amount of effort is being made to reduce packaging. Making it thinner, making it lighter, leaving it out, replacing a sticker. In all categories a lot is being done about this. Reuse is increasingly included on the agenda, but is much more complex than reducing the amount of packaging material.

"Responsibility for making a product package recyclable may well be lie with an individual. The use of reusable systems on the other hand goes beyond the product group."

"That is also increasing all the time. We have a sustainability department which comes directly under the CEO, which says a lot about its importance. And sustainability is an increasing concern in all the departments with which we cooperate. Whether it's about building branches, logistics or purchases, buyers are also involved in it nearly every day."

"It really is all about the own brand. The PVF or the fresh food department, that's all own brand too. One example is snack tomatoes. They used to be in a bucket, that's now changed to a plastic tray. This saves 50% on plastic. When we look at plastic packaging, we say 'hey, do we actually really need that?'"

Current knowledge, attitude and behaviour: differences between supermarkets

There is an obvious difference in the extent to which supermarket chains **themselves develop initiatives or follow what other chains are doing.** Albert Hein, Echoplanar and Jumbo are mentioned as frontrunners that people look at.

Discount supermarkets often adopt a more cautious attitude and first want to see if something works elsewhere before they dare to invest. The emphasis on choices for them around sustainability, packaging, recycling and reuse is more strongly on **revenue expectation.**

In addition, there is a difference to the extent to which attention to sustainability mainly **lies with a specific department compared with an integrated part of the management** over all departments. This also relates to the extent of taking the initiative: this is integrated for the forerunners across the company.

We also see differences in **the size of the team** that engages in sustainability.

Looking at local level, a supermarket's location in a **region or town** seems to make a difference: in towns where relatively many people of a **lower socio-economic status** live, branch managers see **less chance of success** for reuse options, particularly as long as disposable packaging is also still provided.

One supermarket dares to invest more in sustainability and reuse options than the others.

“

“In the area packaging material, nothing is happening yet. We have plastic bags for vegetables, and reusable bags. We have not yet made a choice to wave goodbye to them.”

“We have a more wait-and-see attitude, we look at what the competitor is doing. Then we will go along with it. It's the same with new products. We see how it goes and then we will go along with it. Only if there is a market need will we go along with it."

“Everything you change costs money. We are a discount formula that runs on efficiency. We look how we can make the most profit and be efficient. That saves on costs. We focus on the costs. Changing the plastic just costs money because a lot is being changed. Is that what the customers want?”

“The public in my shop prefers to put everything in plastic bags straightaway. They prefer taking 30 plastic bags, because it's nice and cheap to fill with their other shopping.”

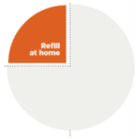
Current situation: reuse models

Refill on the go

Practically all supermarkets offer reusable bags for fruit and vegetables, some also for bread. At one of the supermarkets, the reusable PFV bag is still being developed, one supermarket is involved in completely abolishing the plastic alternative.

One of the supermarkets also offers refill options for a wider range of dry goods, such as pasta, nuts, coffee beans and herbs.

Several supermarkets have had dispenser systems for nuts and/or chocolate sprinkles, but these were removed for most of them because it did not work well: experiences with wastage, problems with hygiene and 'fraud' by customers.

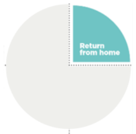


Refill at home

There is little experience with this, it's relatively unknown.

There are several supermarkets that are offering the soda stream or have done so in the past. Making lemonade is familiar, of course, and one or two supermarkets offer concentrated soup in a pot which has to be diluted.

Several supermarkets have (had) a partnership with a top brand of cleaning products that offer this, one chain offers reusable bottles and tablets (for dilution) and with which the bottle can be filled with cleaning products over and over again.



Return from home

This happens very rarely. Moreover, not all supermarkets have a delivery service, and not everybody can offer this themselves.

Supermarkets that already provide a delivery service have a deposit system on the crates in which the shopping is delivered, but no service to collect empty packaging for return.

Two of the supermarket chains are involved in talks with 'Pieter Pot' and are interested in the 'model'.

Return on the go

Everybody has experience with deposits on bottles, which is being extended at all supermarkets to small bottles because of new regulations as from 1 July. We know that this is coming for cans too.

At one supermarket, glass bottles for dairy and juice can also be returned. Other products/packaging cannot currently be returned anywhere as yet.

Internal stakeholders sometimes have to be convinced of the advantage(s) of reusable options, and which interests are most important must be taken into account or it takes extra time to get several stakeholders to get on board

For some chains, sustainable choices are a focal point throughout the whole organisation, for example with purchase and marketing too. For others this is (still) mainly driven by a department (sustainability, quality, corporate responsibility). For all supermarkets it is true that a department which focuses entirely on sustainability is important, in order to make decisions that go beyond any category (such as for reuse options).

It may be a challenge to get different departments 'to get on board' for packaging sustainability (including reuse options), such as:

- **Marketing:** the packaging must remain attractive. This is tricky if no, less or other material is used.
- **Purchase**: costs and new challenges when purchasing another type of package or product.
- **Logistics**: these decisions have an impact on the space in the supermarket (shop floor and warehouse), processing, cleaning, return logistics, logistics for returns to the shop and deliveries, shop operation.
- **Quality managers:** are involved in food safety in the supermarket, which is discussed mainly about matters surrounding the self-filling of packaging (refill on the go).

Understandably, within all supermarkets (mainly discount) it is important to prove that any innovation is financially attractive and in any case **is not at the expense of turnover.**

Certain organisations have some decision-making powers in the Netherlands as well as an **international head office**, whereby decisions must be in line with what happens in other countries. As a result of which, changes can take a lot of time and one wants to implement them on a large scale immediately.

"With grapes or soft fruits in a non-transparent container, you could no longer see the product. Then you get discussions with Purchase and Marketing. Visuality, the consumer wants to see the product, you will then have to brain-storm about that. Often we will do it anyway, just to test it. We dare to take that step. That will stay. We want to be sustainable, but if you don't sell any products, it would defeat the purpose."

"That's always a compromise. It's about shelf life, stickability, the logistics process, marketing, price. All those things are involved. Ultimately, we will just have to reach that target of being as recyclable as possible in 2025 and that 20% plastic reduction. We do in the end have to achieve that.. But yes, sometimes there are other interests that are the decisive factor."

"A dispenser system, for example, or something that has a return flow, that will usually have a great many stakeholders internally. Particularly shop operations, return logistics, flow managers."

"A large part of policy is determined at international level ,but also extra measures are taken/goals are set nationally, for example, because in the Netherlands, we are part of the CBL (Sustainable Packaging Industry Plan) and have signed the Plastic Pact NL. In addition to the international goals, we therefore also comply with these international goals."

External parties in fact often have a stimulating influence

There are various parties that ensure that supermarkets feel (even more) compelled to get involved in sustainability and matters surrounding the reuse of packaging. Including:

- The media, public debate and 'lists' of sustainable supermarkets;
- NGOs, environmental organisations that many supermarkets also cooperate with;
- Plastic Pact NL;
- The government (the SUP regulation/disposable plastic guideline is also mentioned);
- CBL (also goals surrounding sustainable packaging).

In particular, goals that are signed within the Plastic Pact or government regulations are a powerful force: these ensure that supermarkets have no other option than to go along with certain developments.

In addition, there are parties that both stimulate and sometimes hinder:

- Suppliers of own brands. These sometimes come up with ideas about packaging opportunities, they are also well aware of what is possible. On the other hand, the wishes of supermarkets concerning packaging are not always (immediately) feasible.

Finally, there are parties who think about possibilities and the development of, for example, convenient refill systems or packaging:

- Knowledge institutions with which several supermarkets have partnerships, such as KIDV, the universities of Wageningen and Utrecht and consultancy firms.

Sometimes suppliers of quality brands come up with refill options too, which can be offered (as a pilot) in the supermarket, where service supermarkets can easily join in.

"The use of reusable packaging is also driven, for example, by discussion in society and within the government."

"Supermarkets are being monitored and benchmarked on their sustainability policy. Everybody wants to see a good score, as a nice confirmation of the initiatives we undertake."

"<name NGO> is also a partner. So if we have doubts about something, they are the critical stakeholder."

"We have a new reverse vending machine which has a larger capacity. This was decided by the government. If it comes from the government, we have no option but to introduce it and it will take care of itself.. Then there is no other option."

"One solution could be that it becomes compulsory. That one says 'we just have to start selling concentrated soft drinks', because then you no longer have a gap in the competition. Or that we all agree upon it."

"In some instances suppliers say 'we have an option to make this package thinner, or more recyclable.' Then they will come to us. But most of the time it's the other way around, we find. We may want to, but ultimately it's about adapting an entire packaging line."

"We are very much looking at the KIDV. That really is a party from which we get the whole recycling check and a lot of information in any case. So we really see them as a reliable source in 'what is wisdom'. Sometimes we also get the help of consultants. We are collaborating, for example, with a consultancy agency."

12
Opportunities for the four reuse models

Sometimes it's still about looking for ways to set up a successful pilot

"*For example, up to now **not much thought has gone into what type of products are most promising** or what is easiest for the consumer. And because of that, scaling them us has not yet been a complete success. And I also know, because it's already failed with us once... If I develop a pilot once again and yet again it doesn't really work, then of course the **internal support for these systems** will get less and less. So I am actually on the look out, for example, for: **how can I choose a product group or a packaging type whereby it really makes sense to add this.***"

Some common denominators regarding the way in which reuse models are assessed

We are held to account based on profit and turnover. So it is important that we can convince the organisation that it will **not be at the expense of profit or turnover**.

It is important than we can convince the organisation (with several internal stakeholders) **that the consumer is willing to go along with this**.

The above sometimes takes **time**, the use of **pilots** is recommended by some.

It really helps if **other supermarkets** have already shown in practice **that something is working.**

For several reuse models it's important **that systems are set up for this**. Such as weighing systems and systems for hygiene/freshness with refill on the go, collection systems for return on the go, delivery systems for return from home. This requires **investment and collaboration with parties** who are good at this (product development, knowledge partners).

Attention is also focused on the consequences for the available **shop and warehouse space and distribution**.

Matters surrounding **food safety and quality** play an important role, particularly for refill on the go.

There is a great need for insecurities to be removed before one dares to make choices. Proof in the form of practical examples or research and development by knowledge institutions may help to do this.

“

“You must be sure that the willingness of consumers is there.”

“Something that has the return flow, that just has a great many stakeholders internally. … That's no reason not to do it, but it is (the reason) why it is tricky to implement it quickly.”

“It is an additional action for the consumer. Perhaps it is a completely different target group. You really need a pilot for this.”

“Better to steal something good, than invent something bad. If the competitor has rolled it out, then the supermarket may think, 'hey, we’ll do that too.”

“For example, some (of people's) own packaging do not fit on the scales. We are working on adapting this.”

“How about food safety, what happens with that container. Somebody falls ill, who is responsible. In the case of nuts, that will always be a risk.”

Refill on the go is most often preferred, refill at home and return on the go are also good options

In general, there is always a very positive reaction to most reuse models. Refill on the go is mentioned most often as the preferred option. But preferences do vary:

- Difference between discount formulas with a limited range and pricing strategy and service supermarkets with a wide range and bigger margins.
- Preference also varies dependent on the product category concerned.
- For return from home it makes a difference, of course, in terms of whether or not you already have a home delivery service.

Below is a short summary of the preferences (numbers and reasons), on the following page the advantages, disadvantages and requirements are described for each model.

Refill on the go

3 x by head office managers
2 x by branch managers

- Everybody feels this is an option, particularly because it is already being done. Fertile ground and evidence are already present.
- Obvious contribution to sustainability.

But not everybody wants to expand this:

- Questions about hygiene, food safety, vulnerability to fraud, liability.
- Also demands something from the consumer/client has to be involved in this
- More work in the shop
- Requires investment/development of systems.

Refill at home

3 x by head office managers
1 x by branch managers

- Easy for the consumer.
- If this is introduced by a top brand, some find it very good to sell in their supermarkets.
- For a supermarket. it is not very useful, unless you also adapt your own-brand products to it. That is a fairly laborious process and it's tricky to first carry out a small-scale pilot.
- With discounters there is often no room for such an extra product besides the own-brand range.

Return from home

not mentioned as a preferred option, although some see possibilities in it

- It fits with the delivery service of some supermarkets.
- Not an option for supermarkets that do not do deliveries.
- For the supermarkets that do deliver, this is fairly unknown and there are practical objections, such as delivery drivers who have to take large amounts of products back to the distribution centre. Also the question as to who will take care of the cleaning and refilling.

Return on the go

3 x by branch managers

- For most it's very logical to keep and expand.
- Proven that it can work.
- Consumers are already used to it.
- But an important objection to expansion is lack of space in warehouses.
- Some foresee extra 'hassle' with intake (extra action, hygiene).

Refill on the go

Positive aspects that can be seen

The fact that this is offered by more and more supermarkets for fruit and vegetables makes it easier for others to also start doing this for this category. Customers get used to it and it offers ‘a means of proof’ that it can work.

A significant reduction in packaging material

Some view it as more customer-friendly: you yourself determine exactly how much you buy.

One of the supermarkets is already doing this for several categories and states that this works well, that wastage and problems with hygiene are not too bad. Other supermarkets can potentially learn from that.

Offering bags/packaging in house style may help with customer bonding.

“It does help that it's widely available in Dutch supermarkets. But we would really like to see the evidence. When we see that it works for other supermarkets, then it can work for us too.”

Barriers that can be seen

Hygiene, food safety and wastage (because of low flow speed) are frequently mentioned as barriers that prevent the introduction of this for more product categories. Practically all supermarkets have gained previous experience with dispensers for nuts or chocolate sprinkles, for example, but practically all of them have discontinued this for the above-mentioned reasons.

You cannot give any product information on a package.

Unclear who is liable if something is wrong with the product/if somebody falls ill with it, for example.

Refilling and cleaning is extra work.

Takes up shop space. You can store fewer products per metre.

Requires something from the consumer (bringing packaging along, self-filling).

“*For a supermarket, efficiency is very important. The maintenance of a reusable system, for example with loose nuts or cereals, requires extra work.”*

What else is required

Innovations in systems, that remove worries about hygiene and wastage.

Innovations in systems with regard to weighing (if the product is in a shop’s own package).

Possibly also make reusable packaging available.

Taking consumer 'along’ in this and let him/her get used to it.

Some supermarkets are consciously involved in making it more approachable and more normal for consumers to bring along their own packaging. Both at a practical level in terms of range as well as more at a motivational level, for example by 'rewarding’ you for bringing your own packaging for a discount.

Refill at home

Positive aspects that can be seen

Customer does not have to take anything to the shop that he/she may forget.

Less volume, which is more efficient in terms of transport/logistics.

The reduction in packaging material as such and the reduction in 'transport of water' fit with efforts to provide more sustainable choices.

Relatively easy to implement, particularly if it' is delivered by (top brand) suppliers (therefore if the supermarket itself does not have to do the development). This particularly holds true for service supermarkets that have space to offer several products/versions and brands next to each other.

“Relatively easy transition. However, the perception of the consumer does vary per product. I think the most low-hanging fruit.”

Barriers that can be seen

Currently there is still a low level of supply of these types of product.

Specifically extra shelf space, if you have to offer the concentrated refill and sturdy packaging. This is also true if, in addition to the refill option you are also still offering the standard product. Discounters in particular often do not have this space, nor do they for top brands besides their own brand.

For own brands the production line must be set up for this, which requires significant investment. Even for only a pilot.

Suppliers must be able/willing to go along with this.

Less ‘sexy’ option for consumer.

Seems to make less of a difference in reducing packaging material than, for example, refill on the go.

You may also have less margin on a small product. Volume of the traditional packaging seems greater, whereby you can possibly ask more for it than for a concentrated product.

What else is required

Question from the consumer/proof that consumer is open to this.

It should not be more expensive than the 'ordinary' version.

And it must be made very clear to the consumer that it will be cheaper in the long term.

Proper promotion and demonstration, bringing consumers along in this. Also providing publicity for the products, so that people know it's there.

Manufacturers/suppliers who facilitate this. Manufacturers of own brands, as well as suppliers of top brands who offer this.

"Also requires something from suppliers. We ask suppliers to come up with some good initiatives, telling them that we are willing to adopt them. But initiative won't be coming from retailers soon, purely and simply because we don't make the products ourselves.”

Return from home

Positive aspects that can be seen

Supermarkets that already have a delivery service do see possibilities of joining in with this.

Reduction in household waste is attractive to consumers.

Reuse of packaging is in line with the goals surrounding sustainability/reduction of packaging.

"I find this a very good opportunity. I see it as a good link with our delivery service."

Barriers that can be seen

Some do not do home deliveries, so then it is not a logical step to add.

Is viewed as a very different business model that requires a great deal of investment.

Inconvenient if a delivery driver has to take a lot of empty packaging in the van (lack of space) and has to return it to the distribution centre. Logistical challenge.

Taking up self-cleaning and refilling is probably not efficient.

"There are many questions about logistics handling, hygiene and costs. Together we will have to find an answer to these (questions)."

What else is required

Good reusable packaging which you can offer as a supermarket.

Packaging that does not take up too much space on collection.

Collaboration with a party that specialises in this (such as Pieter Pot) could be an option for some.

If the supermarket itself has to do the cleaning and refilling, then it requires a good system for cleaning and refilling, but that seems too big an investment.

"My personal wish is that we offer this online, so that you can join that other system."

Return on the go

Return on the go

Positive aspects that can be seen

Is already working well with deposit bottles.

Consumers are already used to it, which is how we know that this can work well.

“This is already ingrained, so if something new needs to be put in the bottle machine, I think that this will quickly become general practice.”

Barriers that can be seen

Shops must manage their retail area efficiently and often have limited warehouse space. Shops often do not want to be a 'storage space’ for empty packaging.

It brings extra work to process the returned packaging.

The machines are not yet designed for a wider diversity of packaging. Requires significant investment.

Also adapting investment in bar codes, data system for processing.

Doubt whether ‘waste processing’ should be the responsibility of supermarket chains.

“The challenge is that a shop is a shop and not a storage space for empty packaging. That is where the challenge lies. How to organise it, where you are going to put it and who is going to pay for it, are questions that are being raised. If we get answers to that then we would like to be part of it.”

What else is required

To be willing to invest in return possibilities, more/all supermarkets will need to implement this. This must potentially be organised at branch level, for example controlled by the CBL.

This would mainly be possible with packaging that does not take up too much space.

A good logistics system, whereby packaging do not have to be stored in the warehouse for too long.

Waste processing industry and government must be involved, requires coordination.

“On the one hand, you want to stand out, of course, but on the other hand, it would help to make choices at branch level. That way you keep it simple for the customer and there will be a greater chance of success.”

The preference for a model also depends on the type of product

Refill on the go

+

Greatest opportunity:
PFV (potatoes, vegetables, fruit)
Bread
Juice (at shops with a juicer)
Subsequently/possibly later on:
Dry products like rice, pasta, muesli, coffee beans
Sweets
Salad bar
Cleaning products

-

Refrigerated products like milk, ready meals (in relation to food safety)
'Wet' products that lead to spillages

Refill at home

+

Cleaning products
Personal care/shampoo
Soft drinks
Soup
'water-based products'

-

Foods

Return from home

+

Products in glass jars and bottles

-

Different types of bottles (logistics)
Bulk packaging (storage space)
Cans (tricky to clean)
Fresh products like bread
Refrigerated products

Return on the go

+

Glass packaging (bottles, i.e. olive oil, jars)
Sturdy plastic packaging
Terpak (but probably for recycling instead of reuse)

-

Small portion packaging
Thin packaging

Sub-study 3 – Desk research foreign supermarkets

Introduction desk research

The current research has shown a need felt by managers of supermarkets for certainty and best practice examples from other supermarkets before they really dare to invest in reuse options. Understandably, it is pleasant to know whether a certain concept has been successfully applied before.

Furthermore, we are aware of the fact that certain concepts of reuse have already been applied in several foreign supermarket chains. By means of desk research, we have created a brief overview of foreign initiatives in this area. This mostly serves as inspiration for Dutch retailers and other parties that are involved in this subject.

The desk research is obviously limited to publicly available information. This limits the insights in strategy and drivers behind certain choices, as well as insights in failed initiatives, impact on sales or other helpful learnings. To gain a deeper insight, we would advise to discuss these initiatives with the concerning supermarkets. Unfortunately, there was no room for this within the constraints of this current research.

In consultation with the Ministry of Infrastructure and Water Management, we have decided to focus our desk research on the initiatives of supermarket chains within France and the UK. It was already known that different reuse initiatives had been introduced in supermarkets in these countries.

Consulted sources are listed below each slide.

Important development in France regarding reusable packaging: a new law is in the making

France's President Macron has appointed a citizen council for the climate and has promised to adopt its recommendations. One of the recommendations of the Convention Citoyenne pour le Climat addresses limiting plastic packaging by adopting refill systems.

Their recommendation comes down to stimulating refill on the go initiatives. This includes the possibility for the customer to bring their own refillable packaging to the supermarket, to fill this with pasta, nuts, rice or a range of other products. The store or supermarket can buy these products in bulk, which enables the manufacturer to reduce the use of single-use plastics.

The French government has translated this recommendation into a new law, which states that before 2030, 20% of the floor surface of shops larger than 400 square meters must be fitted with refill systems. This law, which has been approved by the parlement but has yet to be approved by the Senate, thus mostly targets large supermarkets.

Hence, France has shown to be a forerunner regarding reusable packaging initiatives. Especially since a few A-brands have been experimenting with reusable products in France, such as Babybel with unpackaged cheeses, Kellogg's with cereal stations and Danone with yogurt machines to refill resuable packages.

> *"Despite the covid crisis, major brands and supermarkets are continuing their pilots for packaging-free sales. This new and sustainable way of shopping will therefore continue to grow, and the French market has proved to be a good testing ground."* - Dutch Ambassy in France

'Le Vrac' range of products at Intermarché, 2020

1. https://www.plasticsoupfoundation.org/en/2021/04/revolutionary-frances-tres-simple-alternative-to-plastic-packaging/
2. https://nost-france.org/2021/03/29/frankrijk-verpakkingsvrije-verkoop/
3. https://nl.france.fr/nl/nieuws/lijst/duurzaam-overnachten-frankrijk

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In France, Carrefour is collaborating with Loop for a Return from home and Return on the go initiative

Carrefour

Carrefour has initiated a Return from home/Return on the go pilot in collaboration with 'Loop'. Loop is an initiative by TerraCycle and specializes in the sale and reuse of sustainable consumer packaging, including the product itself. Carrefour was the first supermarket chain worldwide to offer Loop products. They now work together with more chains, including Tesco in the UK (see next page).

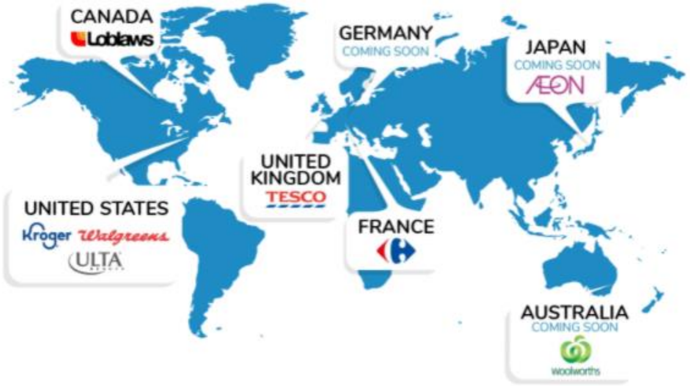
How it works: Participating (premium brand) products can be purchased in reusable packaging, in the Carrefour store or with home deliveries. When the packaging is empty, you can collect it in a special Loop tote bag, which you can have picked up from home by Loop or hand in yourself at the return point in the Carrefour store. Customers can also return the Loop bag with reusable packaging when groceries are delivered at home. The empty packaging is cleaned and refilled by Loop.

When they return the empty packaging, consumers get back their deposit. This is managed via a QR code on the bag or a sticker, the Loop app or at the cash register.

Loop offers reusable products from Nutella, Danone, Evian, Coca-Cola, Fuzetea and Bonduelle, among others.

Loop packaging has a sustainable and reusable design. Not just functional, but good looking as well.

Loop official in store return point and purchase point for selected, reusable products.



Loop is still in development and has also been released in the US, Canada, Japan and the UK.

1. https://exploreloop.com/Carrefour

There are also experiments with Return from home in the UK and Waitrose plans to expand Refill on the go

Tesco

Like Carrefour, Tesco offers a return from home initiative in collaboration with 'Loop'.

This is part of Tesco's 4Rs plan: Remove, Reduce, Reuse, Recycle, which aims to reduce plastic waste and packaging.

At Tesco, Loop products are currently only available with home deliveries by Tesco (starting at the end of 2021 they will also be available in selected physical shops). When ordering home delivery, participating products can be purchased in reusable packaging. When the packs are empty, they can be collected in the special Loop tote bag. Customers can have the this tote bag with empty packaging collected by Loop, after which Loop cleans and refills the products. Customers then purchase the products online again through Tesco.

Products are delivered waste-free, without unnecessary packaging material such as bubble wrap.

Customers pay a deposit, which they get back when the packaging is returned

Waitrose

Waitrose is seen as a pioneer of refill options within the UK supermarket industry. They have been working on their "Unpacked" initiative since 2019: a form of refill on the go. In 2019 Waitrose started a trial in one of their stores.

Customers can bring their own reusable containers to fill with over 200 different products such as coffee (which they can grind in the store), beer and wine (can be tapped into their own bottles in store), pasta, frozen fruit, cleaning products, including a collaboration with Ecover. In addition, the range of loose, unpackaged fruit and vegetables is very large. The reusable packaging is also available in stores to purchase or to borrow (with a small deposit).

The first trial was very popular, after which it was expanded to more stores. New plans focus on integrating refill stations throughout the store, rather than havind them in a separate department, to add product refilling to customers' routines.

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1. https://www.tesco.com/groceries/en-GB/zone/loop?preservedReferrer=https://www.google.com/
2. https://loopstore.co.uk/how-it-works
3. https://www.tesco.com/groceries/en-GB/zone/4Rs
4. https://inews.co.uk/news/consumer/waitrose-refill-culture-waitrose-unwrapped-loose-fruit-veg-pasta-rice-beer-298236
5. https://www.edie.net/news/12/Waitrose-rolls-out-unpacked-scheme-plastic-free-no-packaging-groceries--/

Two more UK examples of supermarkets seeing the importance of Refill on the go; pilots are successful and are being expanded

Asda

Conducts a number of pilots with refill systems in collaboration with Unilever.

Due to increasing popularity, this has expanded to more Asda stores.

Middleton now houses the largest pilot refill store in Europe, where customers come from far away to shop sustainably.

Asda's pilot not only involves a partnership with Unilever, but also Kellogg's products, cleaning products, Quaker, and Asda's private label pasta, coffee and rice.

To the right, an example can be found of Asda's refill system.

Customers can bring and fill their own reusable containers.

In addition, Asda's stores have other initiatives to reduce plastic, such as recycling facilities and vegetables without packaging.

"Since it began piloting its first refill zone in Middleton, Leeds, last October demand has been so great among consumers that sales of some goods have out-performed packaged sales, Asda said". – i News UK

Marks & Spencer

"Fill Your Own" is an M&S initiative offering more than 60 different refillable products. 40% of these products are now sold more than the packaged versions, such as pasta and frozen fruit.

Due to its success, it will be expanded to 11 stores in the UK in 2021.

They follow a 'test, learn and adapt strategy' in which feedback from customers is gained through market research and applied in their pilot: for example, stemming from customer feedback, the fact that unpackaged products are cheaper is highlighted in store.

The concept is supported by extra hygiene measures, cleaning, hand sanitizer and support from employees to help fill, weigh and pay for the products.

Customers can use or purchase their own reusable containers. In addition, free, recyclable paper bags are available.

Customers are increasingly using their own packaging. Sales of reusable containers have grown by 38%.

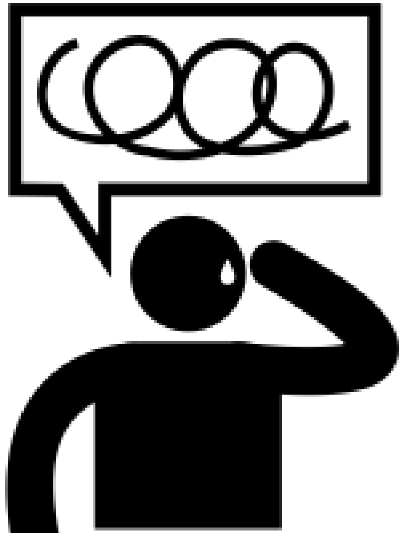
Another initiative by M&S: plastic-recycle-scheme. Customers can hand in hard-to-recycle plastics. The plastic gets used to make playground equipment.

1. https://www.mygreenpod.com/articles/asdas-refill-trial/
2. https://corporate.marksandspencer.com/media/press-releases/5ff7017fc6fe1bc26cb21d12/m-and-s-extends-its-refill-trial-intiative-to-11-stores-nationwide-and-expands-product-range
3. https://www.reuters.com/business/sustainable-business/refillable-revolution-uk-supermarket-asda-expands-reuse-scheme-2021-06-15/
4. https://corporate.marksandspencer.com/media/press-releases/5e0f046f7880b21924350282/m-and-s-food-sees-rise-in-customer-appetite-for-refill
5. https://inews.co.uk/news/consumer/asda-packaging-free-refill-zones-more-stores-launched-fill-containers-from-home-1054432

Attachments for results of quantitative research

(in Dutch only)

Reasons mentioned spontaneously by consumers who stated that they find it difficult to use *refill on the go (note: based on a small number of respondents)*



Waarom lijkt het u (enigszins) moeilijk om dit te doen?

“Moet niet vergeten zakjes mee te nemen, zakjes worden vies.”

“Te omslachtig , ga soms onverwacht de super in en heb dan die tasjes niet bij me.”

“Omdat ik regelmatig boodschappen doe na werk.”

“Dan kun je een aanhanger meenemen om de zakjes, bakjes e.d. mee te nemen.”

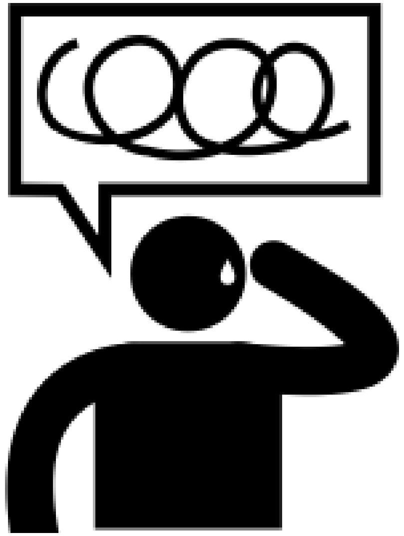
“Omdat je dan veel beter van tevoren moet weten wat je wilt kopen, om de juiste eigen verpakkingsmaterialen mee te nemen. Als ik spontaan trek krijg in frisdrank maar ik heb geen fles bij me om te vullen, heb ik dan ineens pech als er geen alternatief verpakkingsmateriaal voorhanden is.”

“Het zal erg wennen zijn om materiaal mee te nemen om voor 4 personen eten in te verpakken. Daarnaast vind ik het ook minder hygiënisch.”

“Drukte in supermarkten”.”

Q065: Waarom lijkt het u (enigszins) moeilijk om dit te doen? Basis n=45

Spontaan genoemde redenen van consumenten die aangaven dat het hen (enigszins) moeilijk lijkt om gebruik te maken van *refill from home (let op: gebaseerd op klein aantal respondenten)*



Waarom lijkt het u (enigszins) moeilijk om dit te doen?

“Soms gaat de originele verpakking stuk en heb je geen meng-mogelijkheid meer.”

“Je kan het product niet meteen consumeren zoals bijvoorbeeld buiten of als je op pad bent, maar je moet het eerst (thuis) aanlengen.”

“Kost (veel) meer ruimte, veel te bewerkelijk voor de supermarkt en uiteindelijk dus veel duurder (voor de klanten).”

“Kost allemaal extra tijd.”

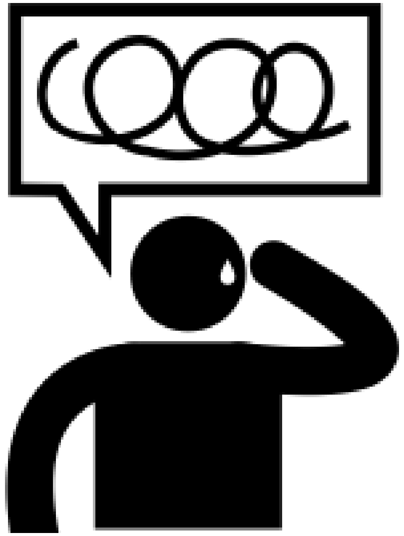
“Verhouding is lastig en zo wordt toch het product anders.”

“Geeft rommel en vraagt vaak handigheid.”

“Omdat het-kant-en klare voor het grijpen staat.”

Q066: Waarom lijkt het u (enigszins) moeilijk om dit te doen? Basis n=28

Spontaan genoemde redenen van consumenten die aangaven dat het hen (enigszins) moeilijk lijkt om gebruik te maken van *Return from home (let op: gebaseerd op klein aantal respondenten)*



Waarom lijkt het u (enigszins) moeilijk om dit te doen?

“Vergt meer discipline. Er moet iemand thuis zijn wanneer er verpakkingen afgehaald worden. Omgekeerd moeten de verpakkingen klaar liggen wanneer ze opgehaald worden. Met welke regelmaat worden de verpakkingen opgehaald? In de tussenliggende periode moeten de verpakkingen ergens bewaard worden (stank?).”

“Nog meer troep in huis, onthouden wanneer het op wordt gehaald, als het met statiegeld is wil je wel dat het goed gaat dus moet je thuis zijn.”

“Veel te veel gedoe.”

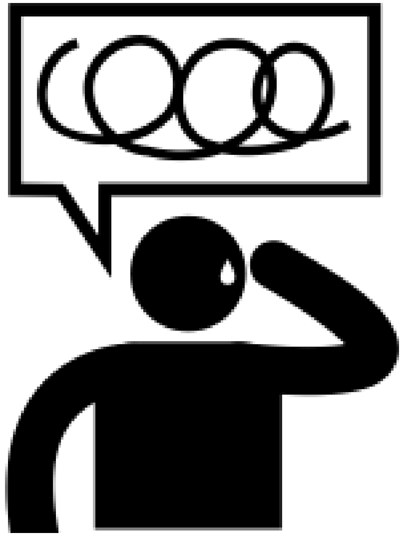
“De resten in de verpakking ,stank overlast.”

“Ik heb de ruimte niet.”

“Te omslachtig.”

Q067: Waarom lijkt het u (enigszins) moeilijk om dit te doen? Basis n=37

Spontaan genoemde redenen van consumenten die aangaven dat het hen (enigszins) moeilijk lijkt om gebruik te maken van *Return on the go (let op: gebaseerd op klein aantal respondenten)*



Waarom lijkt het u (enigszins) moeilijk om dit te doen?

"Extra opslagruimte, meer rommel."

"Omdat ik al mijn dagelijkse werkzaamheden en werk opzij moet zetten om herbruikbare verpakking te gaan inleveren bij de supermarkt. Dit gaat nergens meer over."

"Veel gesjouw met statiegeldverpakkingen naar de supermarkt."

"Veel om over na te denken, kost veel tijd."

"Stinkende verpakking."

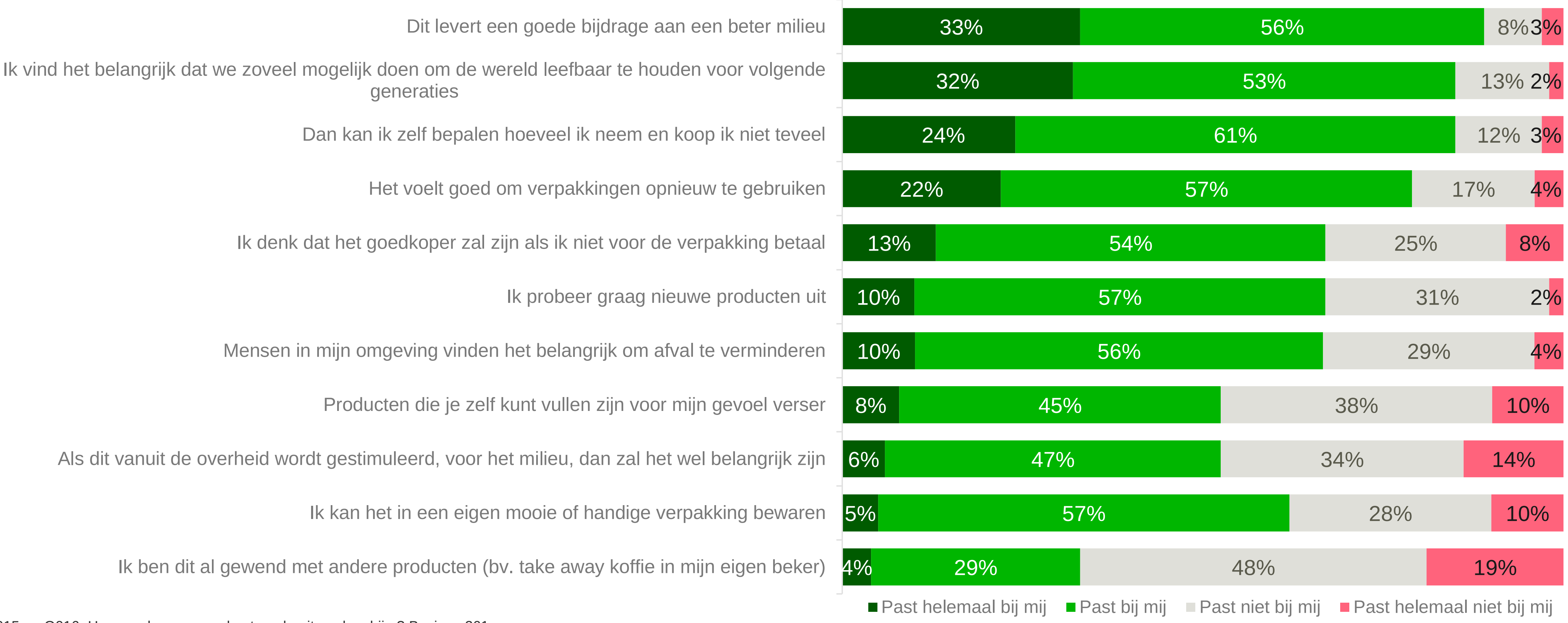
"Gevoel is niet goed."

"Opbergruimte, schoonmaken, meer winkeltijd."

"Een verpakking echt grondig reinigen moet professioneel gebeuren."

Q068: Waarom lijkt het u (enigszins) moeilijk om dit te doen? Basis n=33

Recognition of motivation for Refill on the go

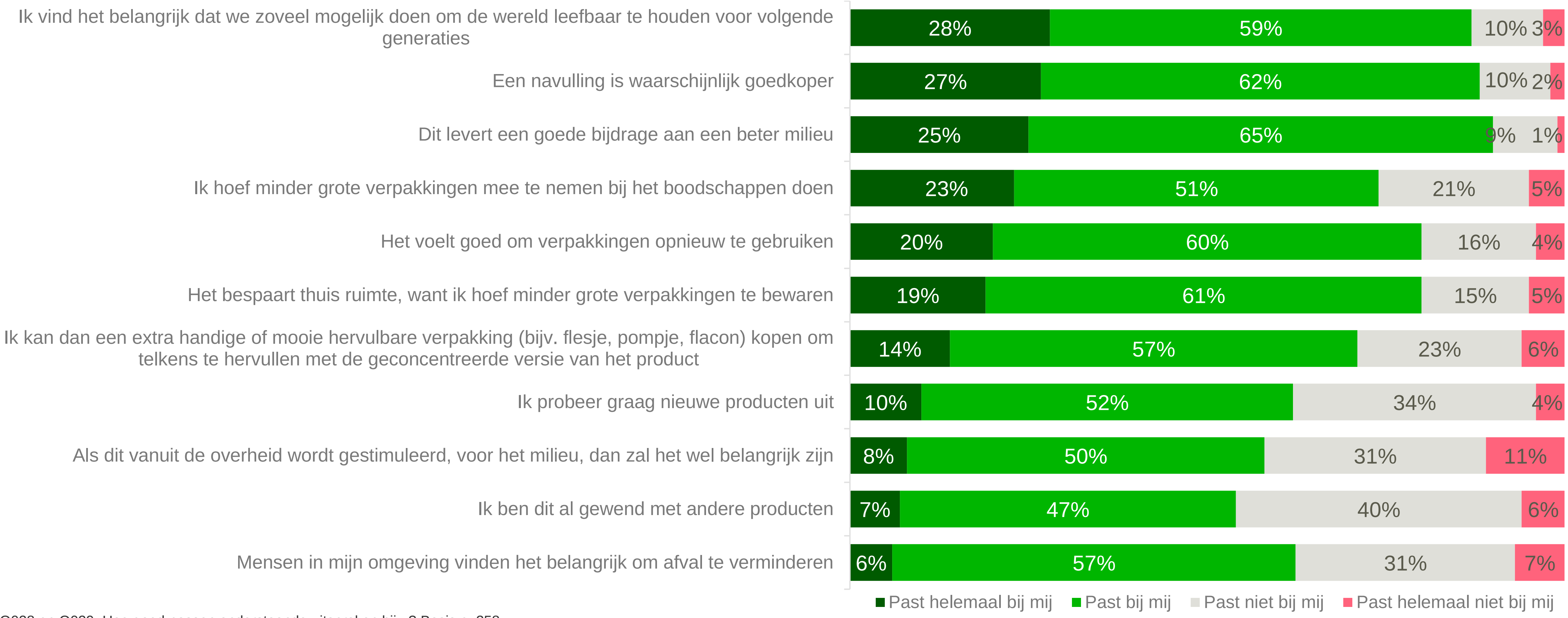


Q015 en Q016: Hoe goed passen onderstaande uitspraken bij u? Basis n=261

Recognition of barriers to Refill on the go

Q017 en Q018: Hoe goed passen onderstaande uitspraken bij u? Basis n=261

Recognition of motivation for Refill at home

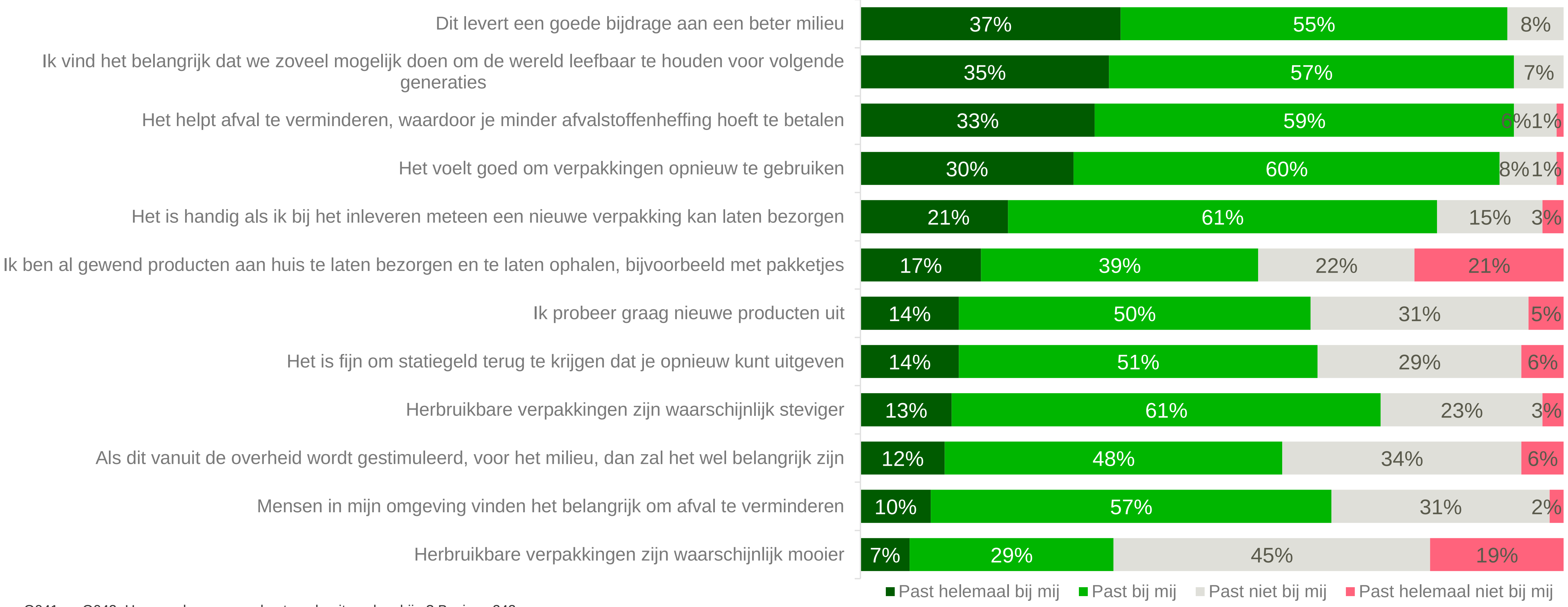


Q028 en Q029: Hoe goed passen onderstaande uitspraken bij u? Basis n=258

Recofnition of barriers to Refill at home

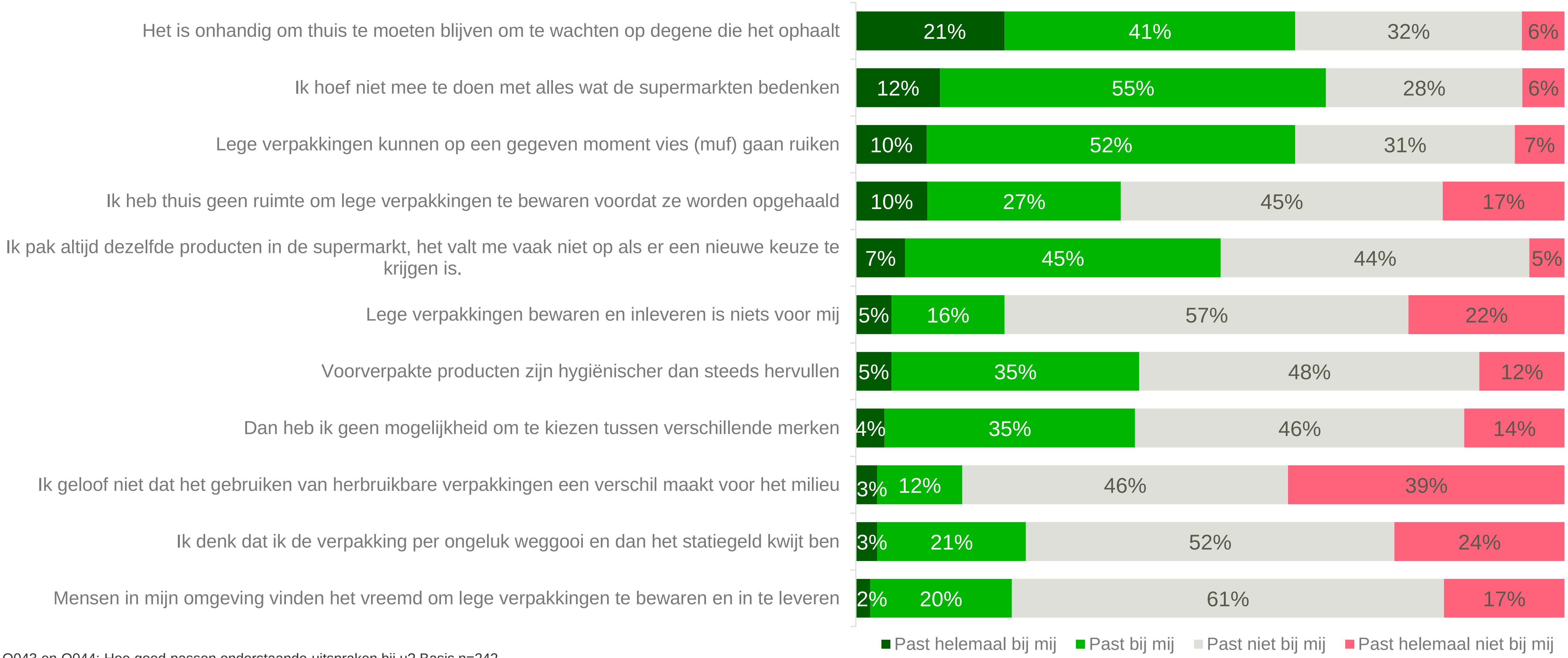
Q030 en Q031: Hoe goed passen onderstaande uitspraken bij u? Basis n=258

Recognition of motivation for Return from home



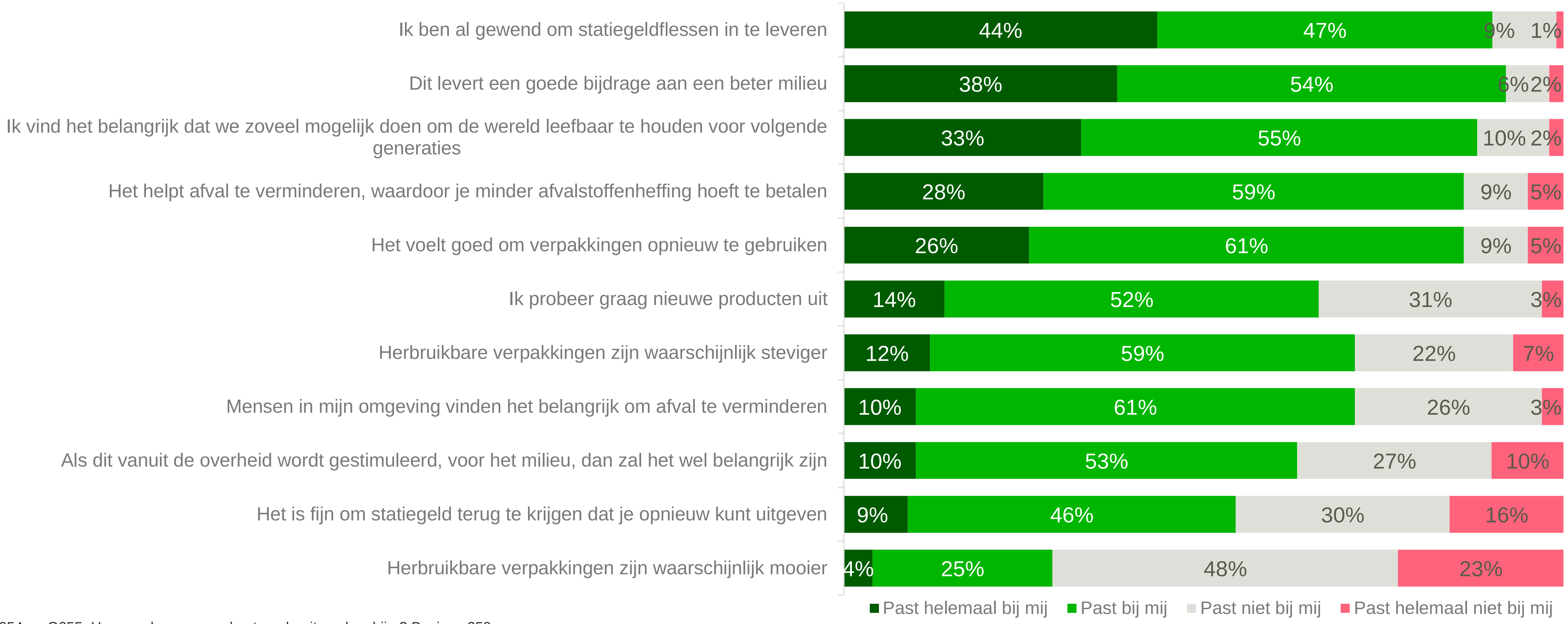
Q041 en Q042: Hoe goed passen onderstaande uitspraken bij u? Basis n=242

Recofnition of barriers to Return from home



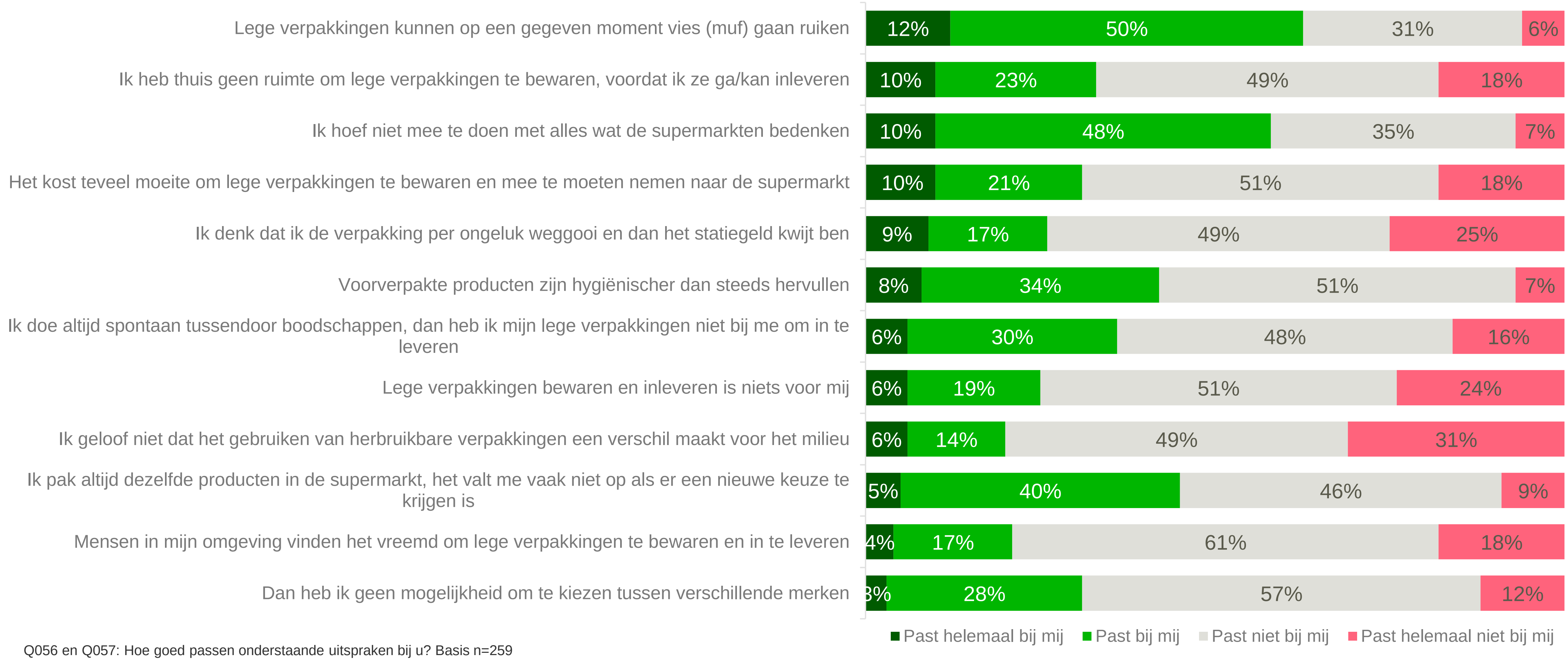
Q043 en Q044: Hoe goed passen onderstaande uitspraken bij u? Basis n=242

Recognition of motivation for Return on the go



Q054 en Q055: Hoe goed passen onderstaande uitspraken bij u? Basis n=259

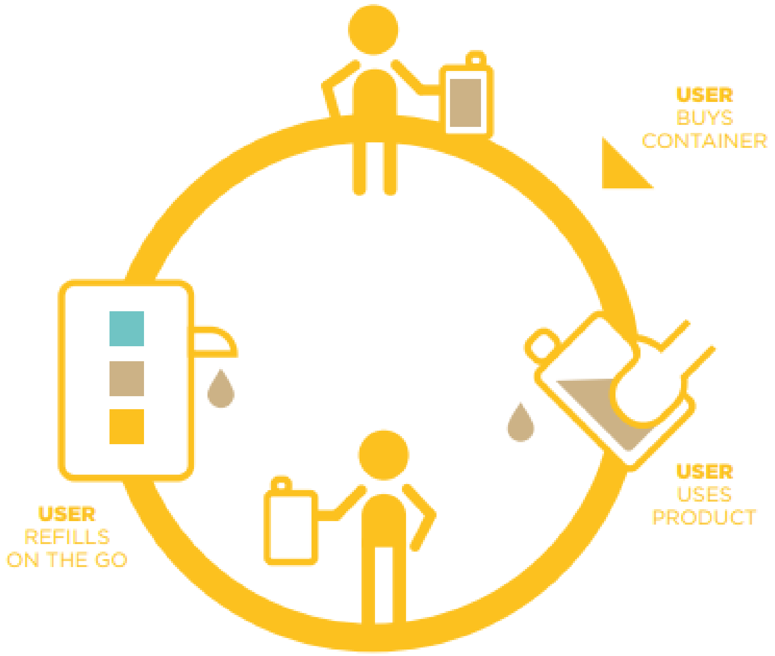
Recognition of barriers to Return on the go



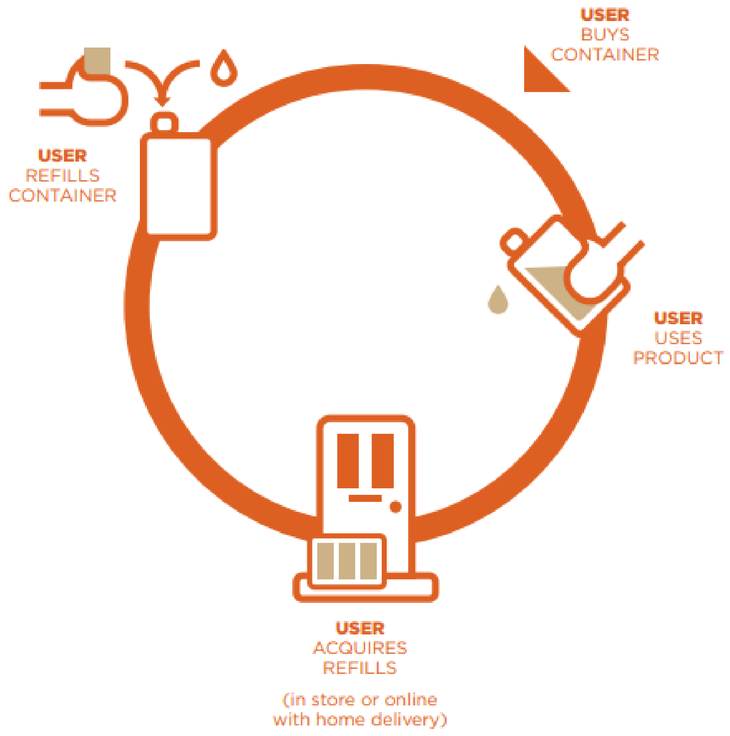
Q056 en Q057: Hoe goed passen onderstaande uitspraken bij u? Basis n=259

Attachments: reuse models with pictures, used as material for prompting purposes during interviews

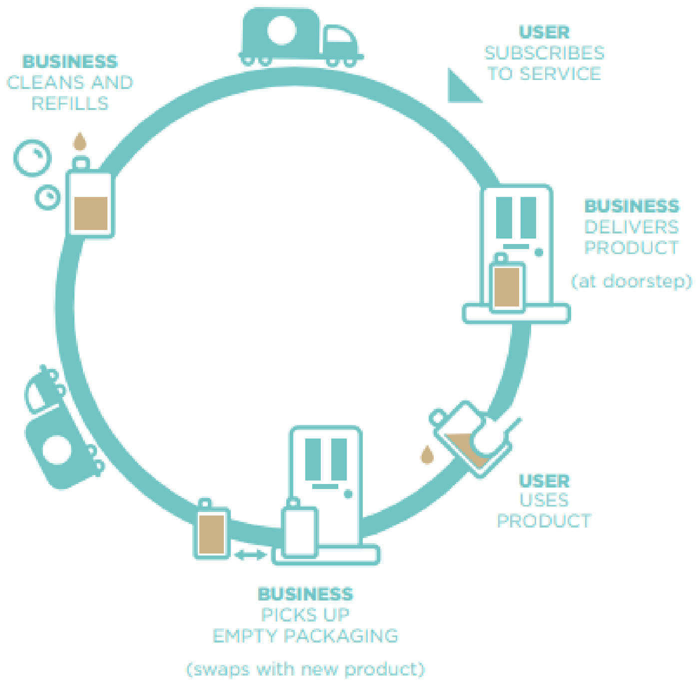
Refill on the go



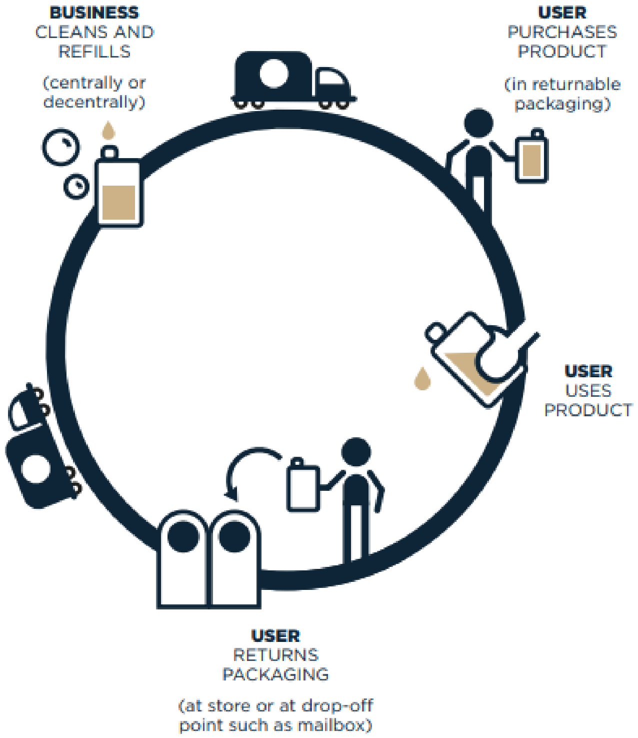
Refill at home



Return from home



Return on the go



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