



FORESIGHT
FACTORY



Peak Plastic?

Changing consumer perspectives of plastic and recycling

Published: May 2018

About this report

HTA works with Foresight Factory, a leading UK trends agency, to identify and anticipate trends that could affect the garden market. Consumer attitudes to plastics are essential for people working in garden businesses to understand, especially with regard to pots, containers and packaging.

We'll be covering this trend and its specific implications for gardening in more depth at our **Cultivating Retail Conference**. If you find this report useful, then do take a look at the agenda for Cultivating Retail; it'll be a great chance to hear more about how the trend is likely to affect our market and how garden businesses are responding to it:

www.hta.org.uk/cultivatingretail



Peak Plastic?

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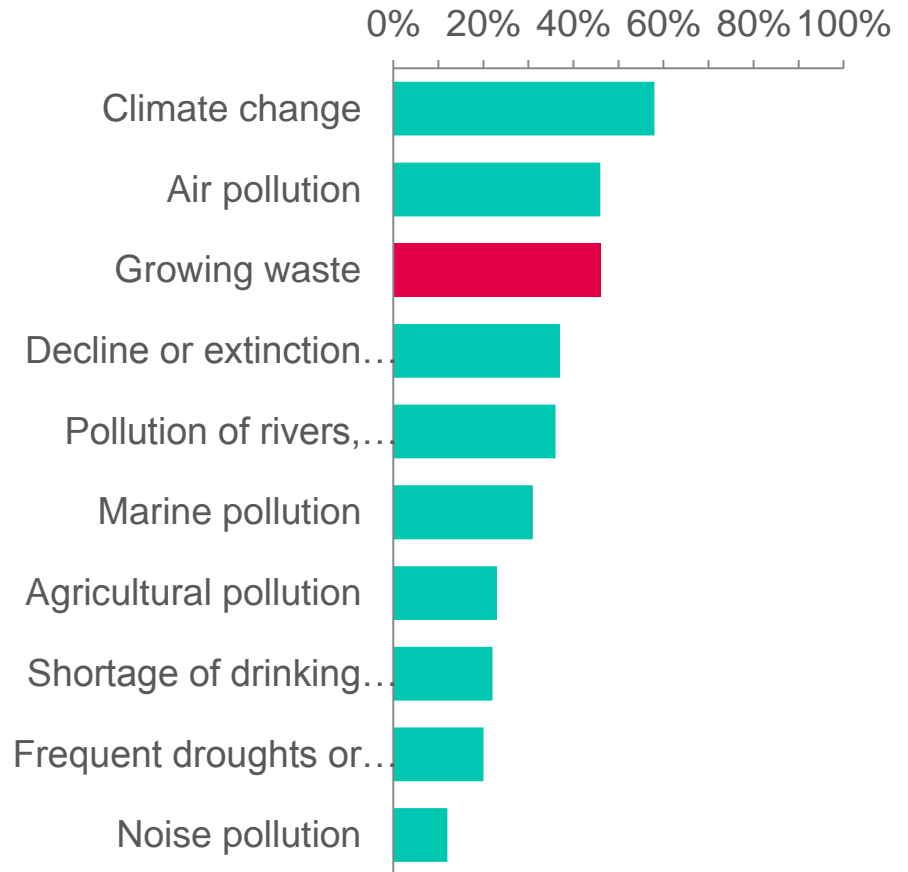
Why plastic is a problem now



Why plastic is a problem now

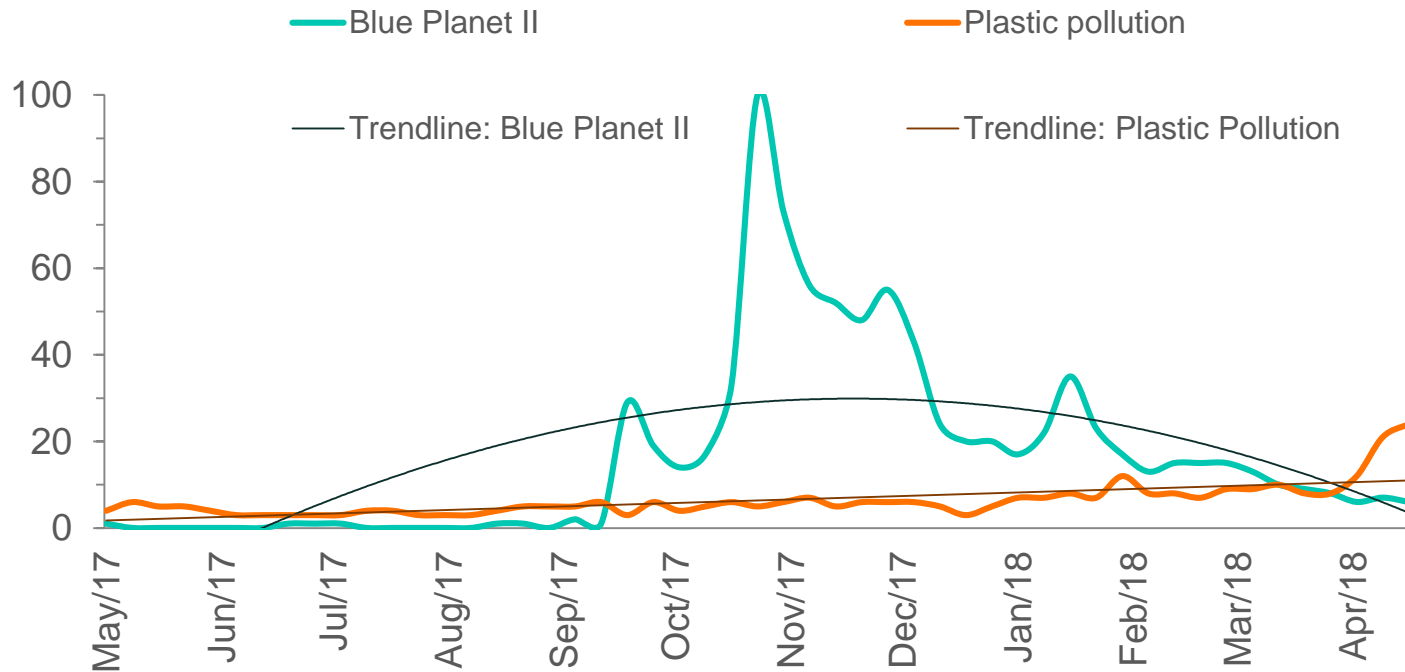
- ❑ Plastic waste has entered the consumer consciousness recently as a key environmental concern.
- ❑ Plastic waste is a relatively *visible* issue compared to other concerns such as climate change and air pollution, and many will be familiar with the arresting images (famously broadcast in the popular **Blue Planet II** TV series) of plastic waste littering oceans or ensnaring animals in their natural habitats.
- ❑ A number of organisations have made 2018 the year to end plastic pollution. **Earth Day 2018** made ending plastic waste its primary mission and the **UN** has declared a war on marine plastic waste claiming that over eight million tonnes end up in oceans each year. This also places pressure on authorities to safely dispose of plastic or recycle.
- ❑ Consumer distaste for plastic has grown and it has become popular on social media to promote the use of eco-friendlier alternatives.

“From the following list, please pick the four environmental issues which you consider the most important” | UK | 2017



Plastic enters consumer consciousness

Popular media is key to understanding why plastic pollution has now become a consumer and business problem in such a short space of time. In late 2017, Blue Planet II was watched around the globe and highlighted the damage to marine life that plastic waste causes. The British show gained a high proportion of searches elsewhere such as Australia and China. As interest in the show peaked, searches around the topic of plastic pollution also grew and then peaked around Earth Day on the 22nd of April.



Click [here](#) for live data

Google Trends is a valuable resource for Foresight Factory, allowing us to monitor our social and consumer trends through another lens: the popularity of Google searches over a period of time. (Please refer to the notes page for further information.)



The driving trends



War on Waste

The consumer distaste for wasteful consumption is pronounced. Minimalist living has spawned a distaste for clutter and a trend for purposeful purchasing. Purchases that are plastic-free and zero waste are aspirational and beautiful. Crafted from natural products such as wood, glass and metal – design principles meet consumers with a conscious.



Effortlessly Ethical

The desire to live and consume in an eco-friendly way may be strong but less eco friendly behaviours will prevail. The convenience that plastic brings to disposable and single use packaging is undeniable and consumers will take a long time to change their habits. Instead, retailers will be expected to take the lead in reforming packaging making plastic-free purchases effortless.

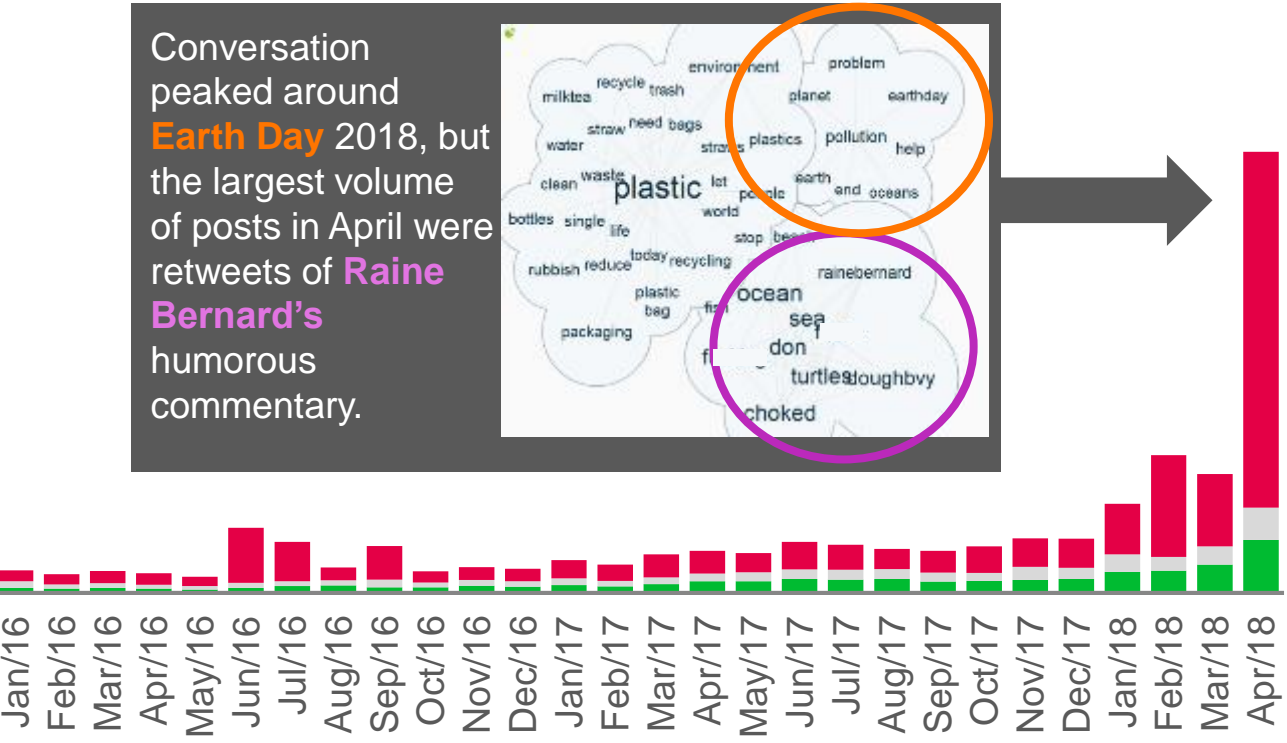
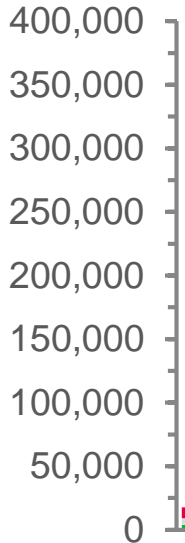


The conversation on social media

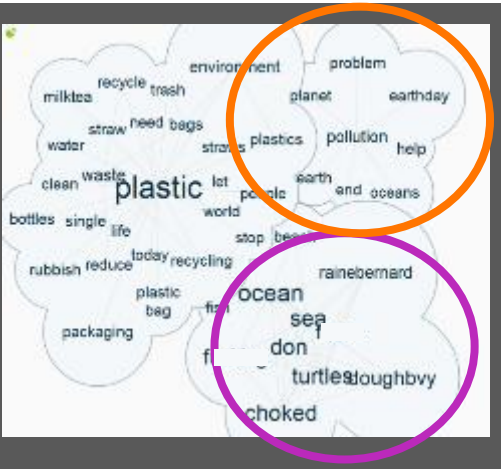


Plastic conversation: overwhelmingly negative

Consumer discussion on social media around plastic, waste and the environment is overwhelmingly negative and negative sentiment accounts for 65% of the conversation.

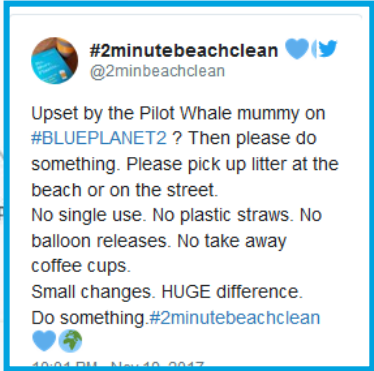


Conversation peaked around **Earth Day** 2018, but the largest volume of posts in April were retweets of **Raine Bernard's** humorous commentary.



A deeper look at litter picking and shopping plastic-free

When it comes to consumers taking direct action, the conversation is dominated by measures such as litter picking and reducing plastic use. The examples below also suggest that litter picking is becoming an experiential leisure event, complete with invitations to socialise and gain social status.



If u want to see me looking like a fool drive by Walgreens. Picking up trash and just chased a plastic bag across the lawn and almost fell 🙄



◀A Bali Beach clean up in February 2018 attracted 20,000 volunteers, 8,000 more than in 2017. The event was organised by **One Island One Voice**.



◀**Bea Johnson** is a stalwart in Zero Waste lifestyles. The blogger has 148k followers on **Instagram** and fits her family's annual waste in a jar.

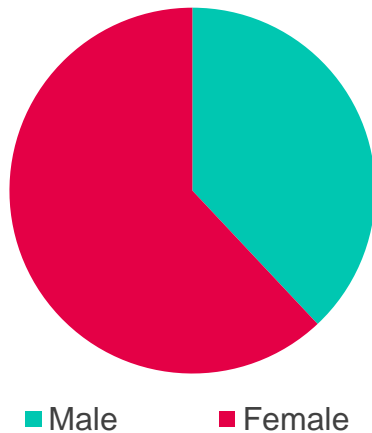


◀**Plastic Whale** tours litter pick Amsterdam's canals as part of a tour guide. Read more about litter picking innovation [here](#).

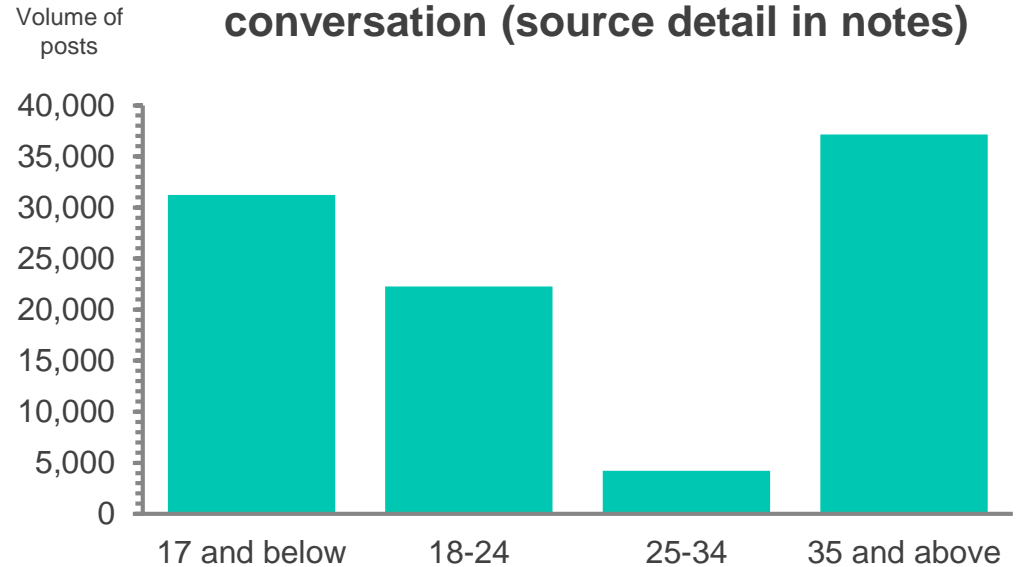


Plastic waste conversation on social media: the consumer profile

Gender: led by women (source detail in notes)



Age profile: Gen Z and Gen X lead the conversation (source detail in notes)



People who post about plastic waste are:

33x more likely to post about climate change, **28x** more interested in sustainability, **52x** more interested in celebrity, **44x** more interested in **Snapchat** than the general **Twitter** population



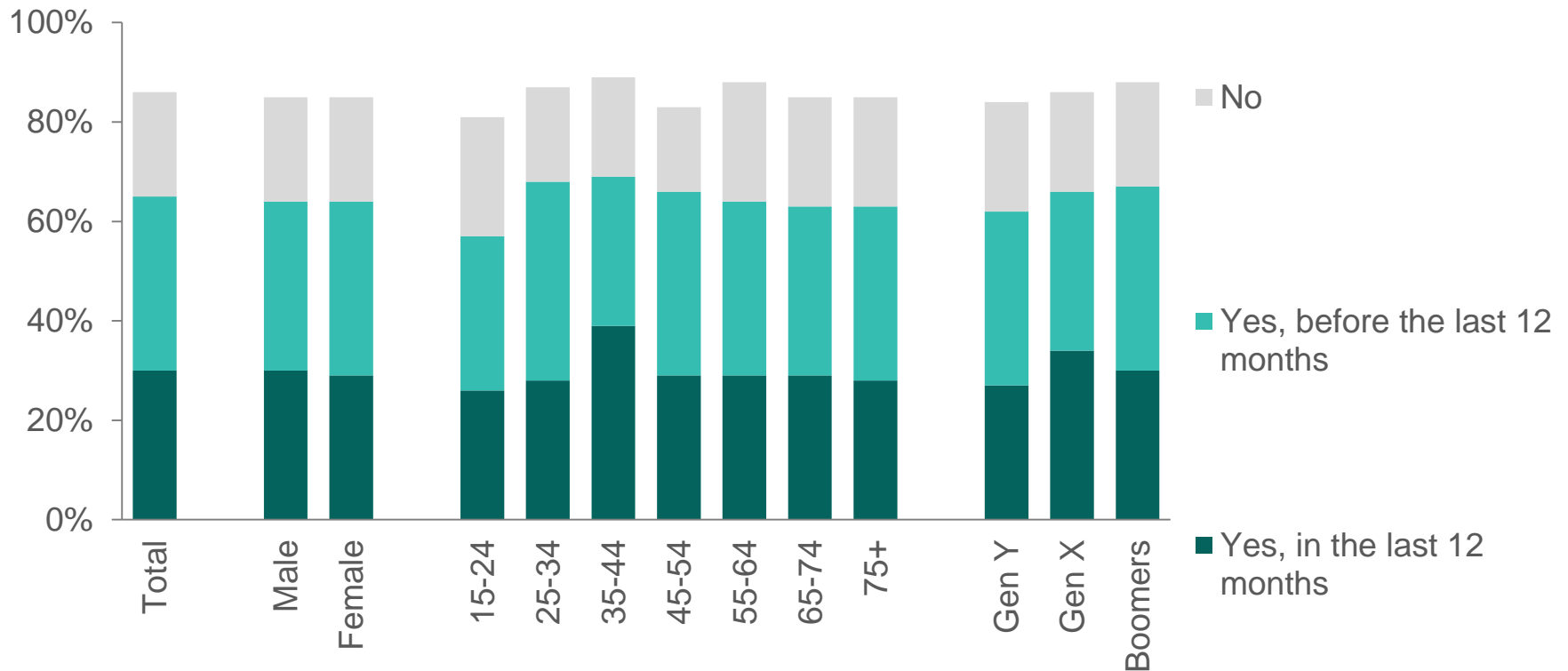
Authorities taking action to limit use of plastic



Cutting down on usage of plastic carrier bags

A significant 65% of UK consumers say that they have cut down on using single use plastic bags in or before the last 12 months. This shows the successful impact of charging for plastic bags, creating a wider argument for implementing government initiatives to change behaviour. Other single use plastics coming under consumer scrutiny include plastic straws, disposable coffee cups and water bottles.

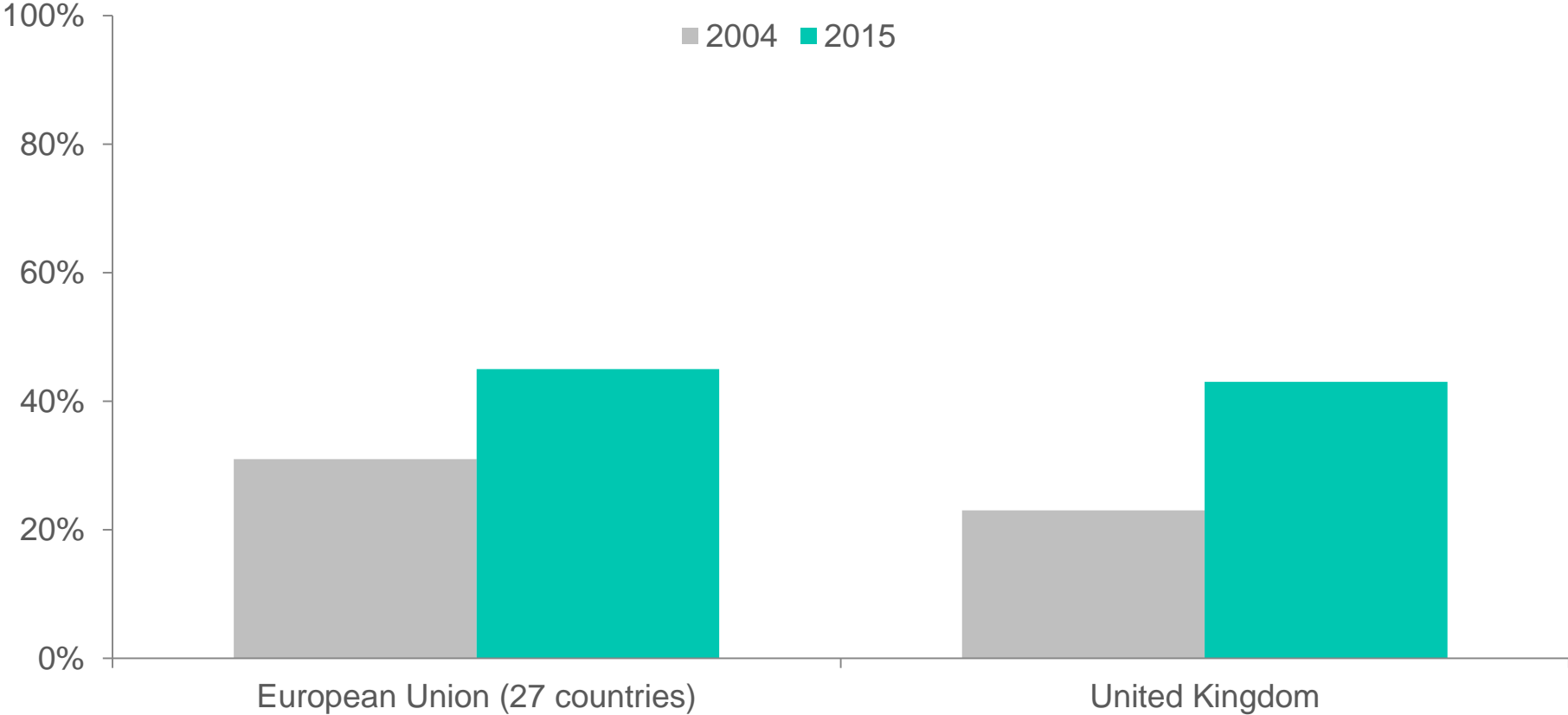
“Have you cut down on your use of single use plastic carrier bags?” | 2017



Recycling rates have improved

The UK has improved its recycling rate from 23% in 2004 to 43% in 2015, which is just below the European average. Targeted initiatives could further improve the UK's recycling rate if it is to become an leader in environmental change.

Municipal waste recycling in European countries | 2004 and 2015 | Updated: April 2018



Authorities taking action

UK pledges against plastic



◀ In April 2018, the **UK Government** pledged £61m to tackle marine plastic waste. This will fund research and local waste management. This follows an announcement in March 2018 to introduce a plastic bottle deposit scheme where consumers pay to use a bottle and are refunded when it is returned. The UK successfully implemented a charge on single use plastic bags in 2015, which allegedly led to 9bn fewer bags being distributed in its first year.

Kenya bans plastic bags



Follow

The plastic bags ban takes effect Tomorrow, thereafter, plastic carrier bags will no longer be in use #PlasticBanKe #BeyondPlasticBagsKe

◀ From August 2018, the **Kenyan Minister of Environment and Natural Resources** announced a stringent ban on plastic bags. Anyone producing or distributing plastic bags will risk minimum imprisonment of one year (maximum four), or a maximum fine of up to USD 40,000. According to the press release, the ban is to avoid health and environmental damage caused by burning bags or from the biodiversity impact of plastic litter.



Authorities taking action

Taiwan blanket ban on single use plastic



◀ **Taiwan** announced plans for a blanket ban on all single use plastics in February 2018. Initially, restaurants will be banned from serving plastic straws in 2019. By 2025, consumers will have to pay to use single use plastic bags, utensils, cups and other items.

Delhi disposable plastic ban



National Green Tribunal

◀ In March 2018, the Maharashtra government in **India** banned the sale and use of disposable plastic bags, cutlery and bottles. This follows a similar ban in Delhi from January 2017. According to a report by the **World Economic Forum**, Delhi's decision was based on worsening air quality in the city from the illegal burning of plastic waste. In summer 2017, the **National Green Tribunal** allegedly ordered the Delhi government to enforce the ban by seizing plastic stock and enforcing a fine for possession.



Litter is a top priority

Singapore has highest litter fine



◀ First offenders caught littering in **Singapore** face fines of up to \$300. The **National Environment Agency** combines the ban with a comprehensive education stream that encourages communities to tidy their own area rather than rely on a public service. **Reuters** claims that the largest fine issued was S\$19,800 (USD\$15,00) for throwing cigarette butts out of a window. In addition to the fine, the man charged allegedly had to also work an additional 34 hours of community service.

UK hikes litter fine



◀ In April 2018, the **UK Government** raised the maximum penalty for littering from £80 to £150. On-the-spot fines can be given to individuals and to vehicle owners if it can be proved that someone littered from their car. Councils are free to decide what penalty they want to enforce and are encouraged to take into account local ability to pay.



Retailers respond to anti-plastic sentiment

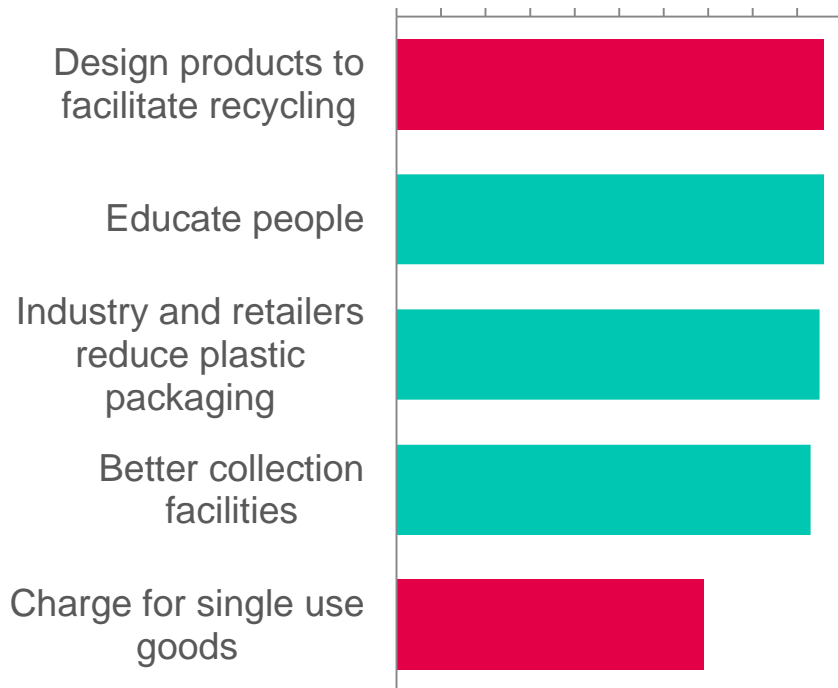


The waste burden falls on retailers

The least popular measure to reduce plastic consumption is charging for single use goods (69%), which is the only measure that penalises the consumer. Consumers have a higher expectation of industry and retailers to reduce packaging (94%) and introduce design and education material (96 and 96% respectively).

“In your opinion, how important is each of the following in reducing plastic waste and littering?”

0% 20% 40% 60% 80% 100%



Right-click on chart and select [Edit Data](#) for more countries



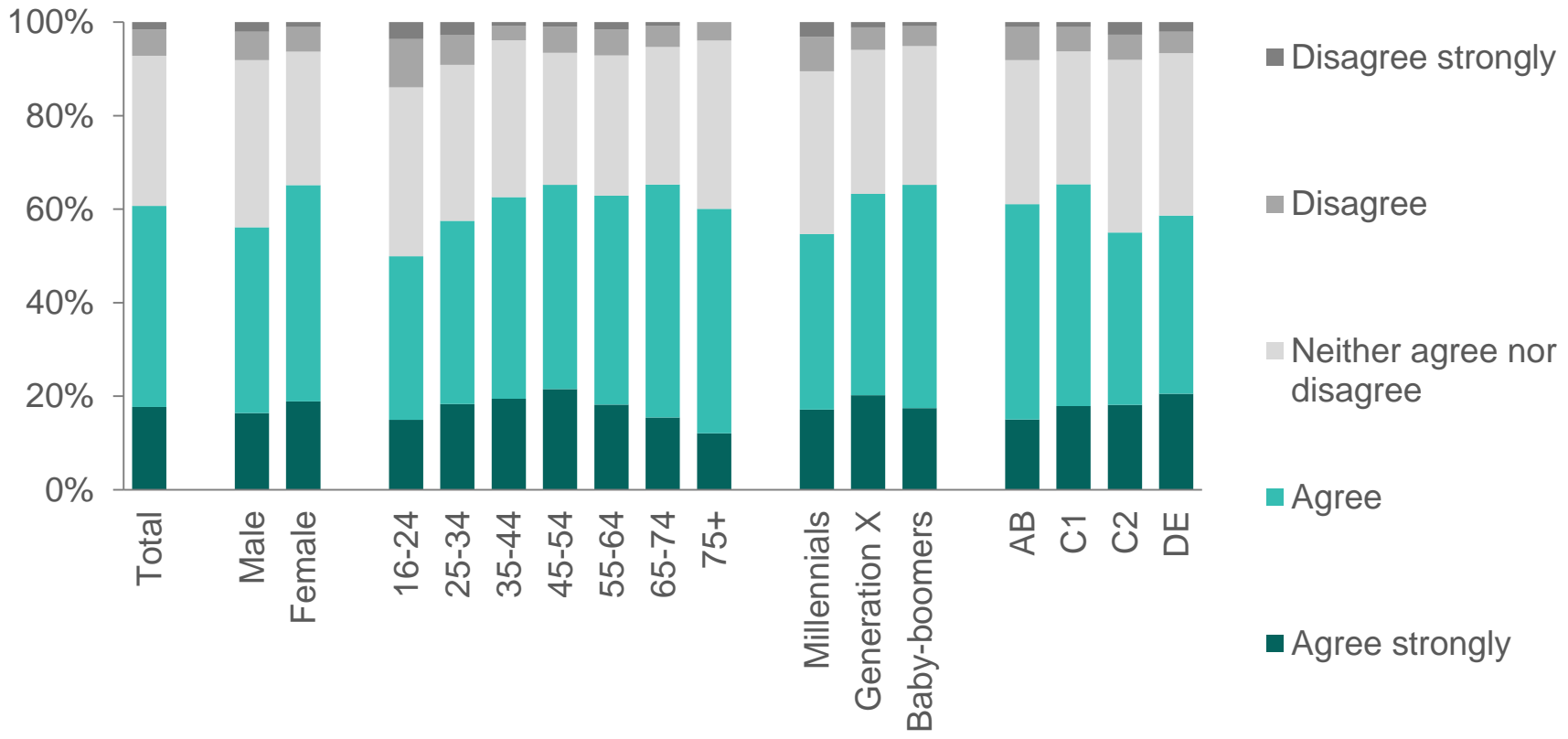
▲ Eleven companies have taken a pledge to attempt to reach 100% reusable, recyclable or compostable packaging by 2025. The pledge is through the **Ellen MacArthur Foundation's New Plastics Economy** initiative. Companies taking part include 11 global brands; **Ancor, Ecover, evian, L'Oréal, Mars, PepsiCo, The Coca-Cola Company, Unilever, Walmart and Wener & Mertz**. The aim of the initiative is to create a circular economy for plastics.



The ethics-price conundrum

There is a stubborn perception among 61% of consumers that ethical products are “always more expensive”. Price sensitive consumers will be wary of new packaging innovation if they believe it is going to cost them more.

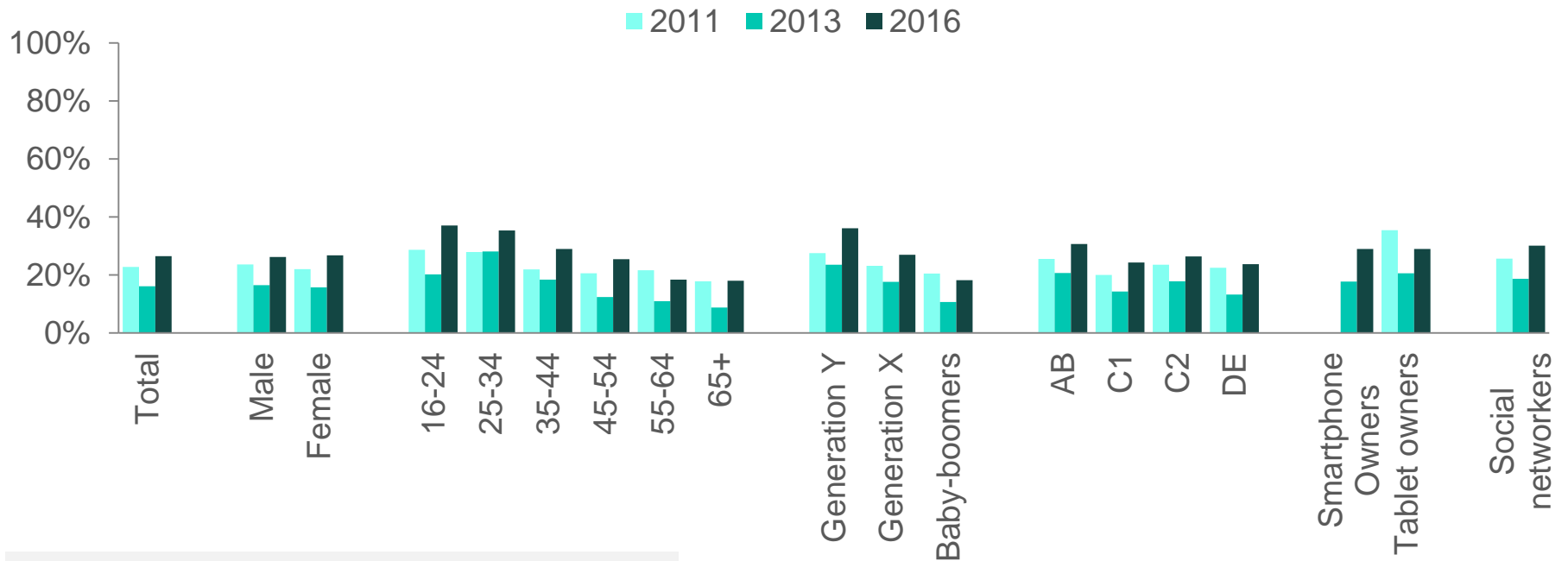
"How strongly do you agree or disagree with the following statements?" | Products that are ethically produced are always more expensive than non-ethically produced products



Willingness to pay more for eco-friendly groceries

Whilst an expectation of higher ethics = high price persists, 26% of respondents claim that they would be willing to pay more for grocery items that would not harm the environment. Since 2010, agreement has increased most significantly among Millennials who are less likely to have burdens of children and mortgages influencing their grocery spend.

“How strongly do you agree or disagree with the following statements? I would be willing to pay as much as 10% more for grocery items if I could be sure that they would not harm the environment” | % who agree strongly or agree | 2016



Right-click on chart and select [Edit Data](#) for demographic data



Convenient, plastic-free innovation

Iceland eliminate plastic from own brand



◀ UK supermarket **Iceland** has pledged to remove plastic from all of its own brand packaging by 2023. Iceland ran a poll where 80% of customers said they would approve of the action.

Plastic free aisles



◀ In February 2018, Dutch supermarket **Ekoplaza** collated over 700 plastic-free items into one aisle in an Amsterdam store. The aisle has a mix of fresh and dry products.

Selling reusable alternatives



◀ In October 2017, **Pret A Manger** announced that three of its Veggie Pret stores in London and its Manchester stores would sell reusable glass bottles. This gives customers the alternative to purchase a reusable bottle and use the in-store water fountain rather than purchasing a plastic bottle.



Making it easier for the consumer

Plastic pact joined by 40 UK retailers



◀ Over 40 firms across the plastic chain have joined **Wrap**, the UK plastic pact that pledges to make all packaging reusable or recyclable by 2025. Single use packaging will be eliminated and these companies will work towards the proper waste management of their packaging. Members include **Arla**, **Asda**, **M&S** and **Nestle**.

Straw free



◀ **The Last Straw** is a UK initiative to end the use of single use plastic straws. A number of companies are experimenting with alternatives. **McDonald's** will be trailing paper straws from May. Others like **Wetherspoon** have stopped including straws automatically and they must be requested by customers. The move to requesting straws is becoming more common and some retailers such as **Waitrose** plan to ban plastic straw sales too.



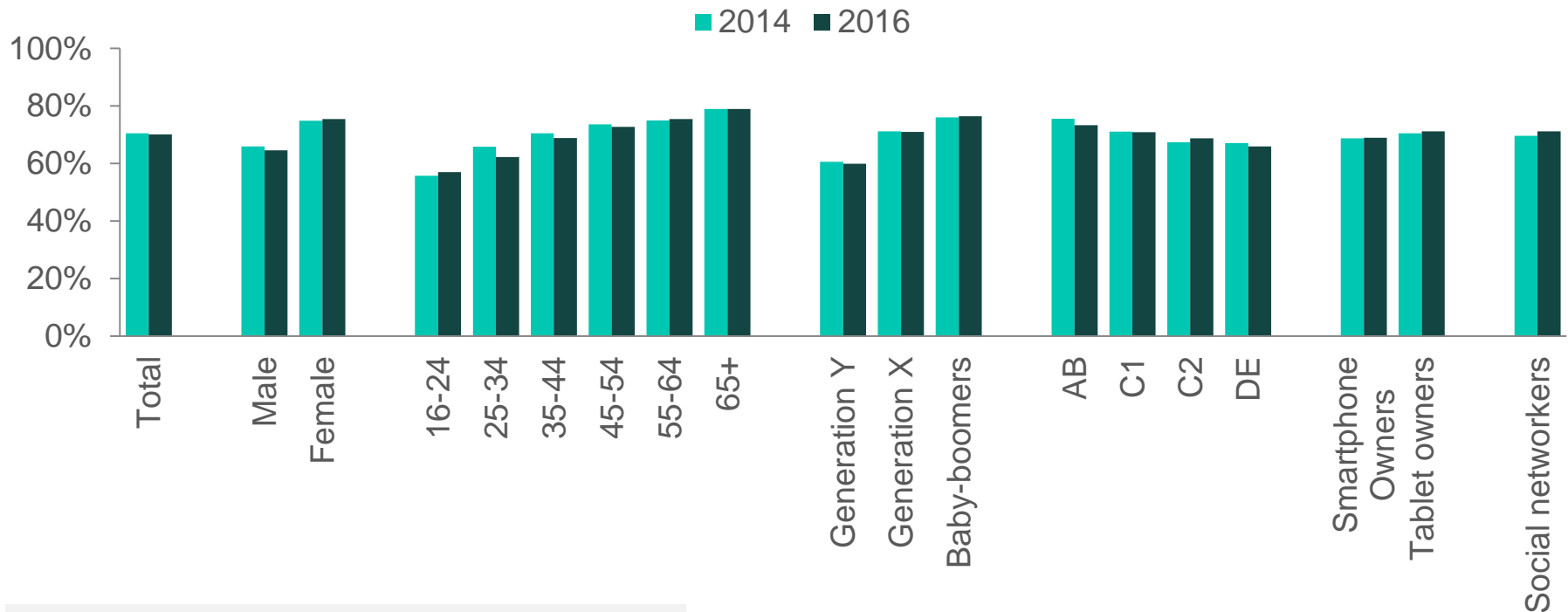
Return and reuse models



Reducing household waste: a widespread aspiration

Anti plastic sentiment is supported by a general desire to reduce the amount of household waste produced. Across UK demographic groups, the majority of respondents say that they are actively trying to reduce household waste. Agreement increases significantly as consumers age and among the higher social demographic groups.

“How strongly do you agree or disagree with the following statements?” | % who agree strongly or agree | 2016



Right-click on chart and select [Edit Data](#) for demographic data



Changing consumer behaviour

Reusable coffee cups are returned around London city



◀ To encourage consumers that do not want to carry around a **Keep Cup**, **Cup Club** has created a reusable cup service. Cups can be used and deposited at multiple points around London. RFID chips link the cups to a customer account so that the customer receives points for bringing cups back. A demo day took place in April 2018.

Zero Waste beauty products with returnable packaging



◀ **Zero Waste Beauty Australia** hand make beauty products that are packaged in glass jars. Empty jars are returnable at any Zero Waste Beauty stockist in return for a discount on future purchases.

Zero Waste kit for a starting a plastic-free life



◀ The founders of conscious consumption page **Stories Behind Things** launched a **Kickstarter** campaign in April 2018 to create a Zero Waste starter pack. The pack will include a water canteen, a coffee flask, bamboo cutlery, a lunch box, a reusable box, a bamboo toothbrush and a How To guide to introduce newbies to plastic-free living.



Buying in Bulk

Bulk supermarkets allow shoppers to shop with zero packaging



◀ **The Source Bulk Foods** is a bulk supermarket with over 20 stores around Australia. In 2017, franchises opened in Camberwell and Chiswick in London. Customers bring empty jars and bags which are weighed on entrance and weighed on exit to determine how much product is in each container. Products on sale included dry grains, pasta, grains and spices as well as honey, nut butter, cleaning products and more.

Bulk Nation starts reusable container scheme and online shop



◀ US bulk supermarket **Bulk Nation** has introduced a bring your own container scheme. Each visit the containers must be inspected by a member of staff to ensure that they are fit for use. Then the customer can fill them with produce and are charged only for the weight of the product. Bulk Nation targets maximising customers who only want to pay for the products they need, but naturally it also appeals to Zero Waste shoppers. In April 2018, Bulk Nation opened an online store that ships within the US.



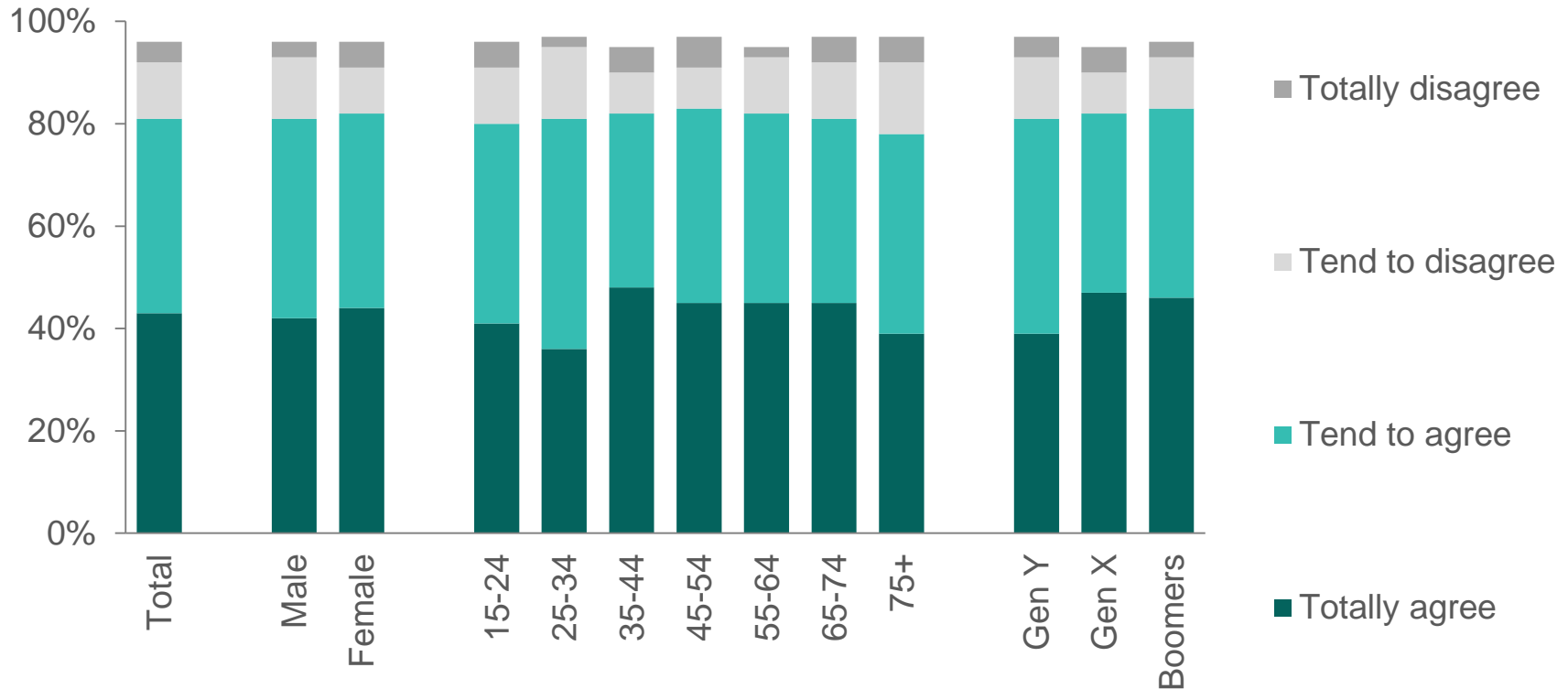
The rise of alternative materials



Alternative materials to plastic

An overwhelming majority of consumers UK citizens agree that they are worried about the impact on the environment of everyday products made of plastic: 81% agree that they worry and 43% *totally* agree. New alternatives to plastic are being designed that are just as convenient to use but that are also biodegradable. Brands are also experimenting with recovering plastic waste and transforming it into new products.

“You are worried about the impact on the environment of everyday products made of plastic” | 2017



Playing with alternatives to plastic

Skincare packaged in Sugarcane



◀ Skincare brand **Bulldog** claims to be the first men's skincare brand in the world to use sugar cane packaging. This greener form of Polyethene is made from sustainably farmed sugar cane instead of fossil fuels, but it still has the same characteristics as Polyethene, which may include taking a long time to decompose. The company that makes the bio-plastic bottles, **RPC M&H Plastics** won the February 2018 packaging innovation showcase award with the design.

Dissolvable Seaweed sachets and wrap



◀ In January 2018, Indonesian brand **Evoware** won the Circular Design Challenge led by the **Ellen MacArther Foundation** which has granted Evoware \$1m to develop its seaweed packaging. The packaging is water soluble and can be used as sachets for coffee or seasoning that can be used in hot water without even removing the packaging. It can also be used to wrap food such as burgers, sandwiches and bread, or bars of soap.



Upcycling old plastic into new products

Running trainers upcycled from marine plastic



◀As early as 2016, **Adidas** unveiled its first **Parley** Ultra Boost, made from Parley Ocean plastic. Parley has created a way to intercept plastic from coastal communities before it enters the marine ecology, and recycle the waste into fibres that are manufactured into Adidas running shoes.

Reimagining plastic waste at Milan design week



◀Milan design week in April 2018 showcased a number of designers who are working with recycled plastic to imagine new uses for it, particularly as the pressure to end virgin plastic production could lead to plastic becoming a more expensive commodity. **TRASHPLAST** brings plastic trash back into homes as vases and other ornaments. TRASHPLAST works with Danish company **Eco-oh!** that turns Danish plastic waste into a useful material.





How to act

Innovate packaging and materials to eliminate plastic where possible. Many consumers desire plastic-free alternatives, but the effort that they want to put into purchasing plastic-free will vary. Make it easy for them to follow their desire at the checkout.

Educate consumers about changes you have made. Hiding innovation that could prove popular will not increase your brand love. If your brand has eliminated plastic or used materials that are more easily recyclable, make sure to shout about it on packaging so that consumers are aware when they are making purchasing decisions (and so that consumers can show off their own commitment to waste-reduction to others).



What will happen next?

Due to the pressure from governments and environmental groups to reduce plastic consumption, we expect manufacturing processes to change. Governments have the power to influence consumer behaviour through forced charges as seen in the bans on plastic bags. We expect other countries to follow initiatives such as those proposed by the UK government, and ban more single use plastics, from straws to food containers.

Plastic has become associated with wastefulness and we anticipate more consumers will change their consumption habits (or at the very least, seriously question them) due to pressure from lobbies, governments and peers. Brands innovating in plastic-free models now can capture this growing momentum.



For more information please contact your Account Team
or email ffonline-help@foresightfactory.co