PACK LESS

PackLess

Supporting SME Sustainable Packaging Transformation

WP2 A1 – Survey report on the use of sustainable packaging in SME companies

Co-funded by the European Union

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Summary	This report shows the results that emerged from the survey conducted in Work package 2/Activity 1 (WP2/A1). The aim of the survey was to analyze the current state of packaging practices of SMEs and the challenges in switching to sustainable packaging solutions in Bulgaria, Poland, Germany and Austria. The survey serves as a basis for the selection of topic areas for the planned MOOC platform and to provide further insights to the European Commission.

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1 Introduction

In preparation for this report, a comprehensive questionnaire was developed by the project-partners. The questionnaire is designed to gather information from small- and medium-sized enterprises (SMEs) across various business sectors, with a focus on sustainable packaging practices. The primary objective of the questionnaire is to assess the current level of knowledge and identify informational gaps related to sustainable packaging among SMEs, as well as to understand their current packaging practices. Additionally, we aim to gauge SMEs' awareness of sustainable packaging and the challenges they face in implementing sustainable packaging solutions. The insights gathered from the questionnaire will be used to develop a learning-tool for businesses and to provide valuable insights to the European Commission.

The **goal** of work package 2, activity 1 was a report with defined needs and competence gaps regarding transformation to green economy, based on research conducted with 100 SME owners/employees from 4 countries.

2 Methodology

To assess the level of knowledge and interest of SMEs in sustainable packaging solutions, a questionnaire was created in cooperation with all partners. In order to achieve the most meaningful results possible, a mixed-method approach was chosen for the survey, i.e. single-choice, multiple-choice and also open questions were asked in the questionnaire.

The questionnaire was divided into three sectors/parts:

- Questions about the business
- State of the packaging practice
- Challenges for sustainable packaging

Annex 1 shows the template for the questionnaire that was used by all partners for the SME survey. For better understanding on the part of the respondents, the questionnaire was translated into the respective national languages.

A total of 100 companies were surveyed - approximately 20 from each partner. The interviews took place either by telephone or the companies had the choice to complete the questionnaire themselves and return it to the respective partner by mail. To obtain the most accurate answers possible, the companies were surveyed anonymously; information such as the name of the participant or the company was only used for internal communication within the partner company.

The results of the surveys were collected by each partner and transferred to a pre-made Excel spreadsheet. All results of the single- and multiple-choice questions were presented in graphs for better illustration and interpretation. In order not to distort the results of the open-ended questions due to possible incorrect translation, these were interpreted by the respective partner country. The results are therefore presented below for each country individually.

3 Results

In the following, the results of the survey are listed according to the order of the questionnaire. The quantitative questions were presented graphically in figures for all countries together, while the qualitative questions were interpreted and listed in tables individually for each country.

3.1 Questions about the business (M1 – M6)

The first section of the questionnaire asked general questions about the company. The questions related to the size of the respective company, the business sector in which the company operates and the expansion of the value chain of the products, i.e. whether the company operates locally, nationally or internationally in terms of production and sales. The exact questions can be found in Annex 1.

As Figure 1 shows, 35% of the companies surveyed reported operating in the food and beverage sector. 22% are based in the service sector and 16% stated that they operate in a sector that is not listed, which includes very different areas such as cosmetics, toys or chemical products. The majority of the companies surveyed (43%) stated that they operate locally. This can be explained by the fact that more than half of the companies surveyed were small businesses with a maximum of 10 employees. 36% said they operate internationally and 21% said they produce and sell nationally (see Figure 2).

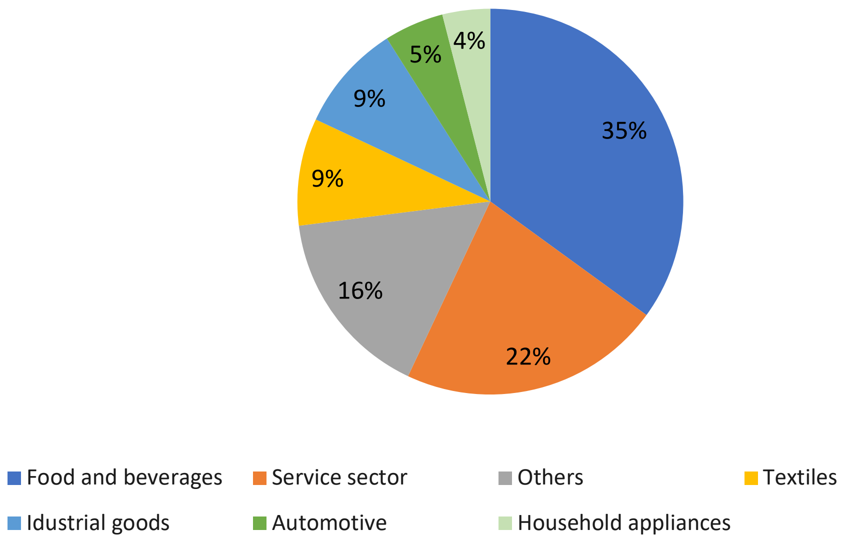

Figure 1: M1: Business sectors of the participating SME's (all countries)

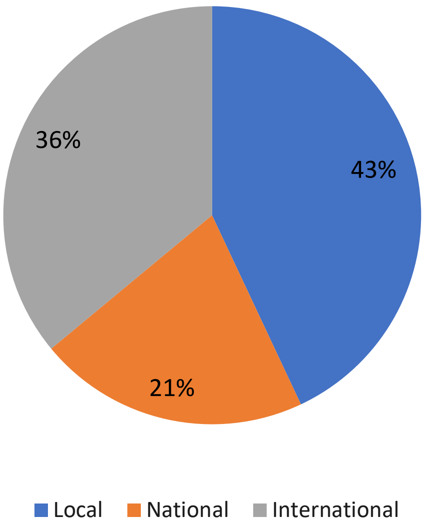

Figure 2: M4: Expansion of the value-chain of SME's product(s) (Production and sales)

3.2 State of the packaging practice

In the second part of the questionnaire, questions were asked about the current use of materials in packaging, about the main purpose of the packaging and about existing processes in the implementation of new packaging solutions.

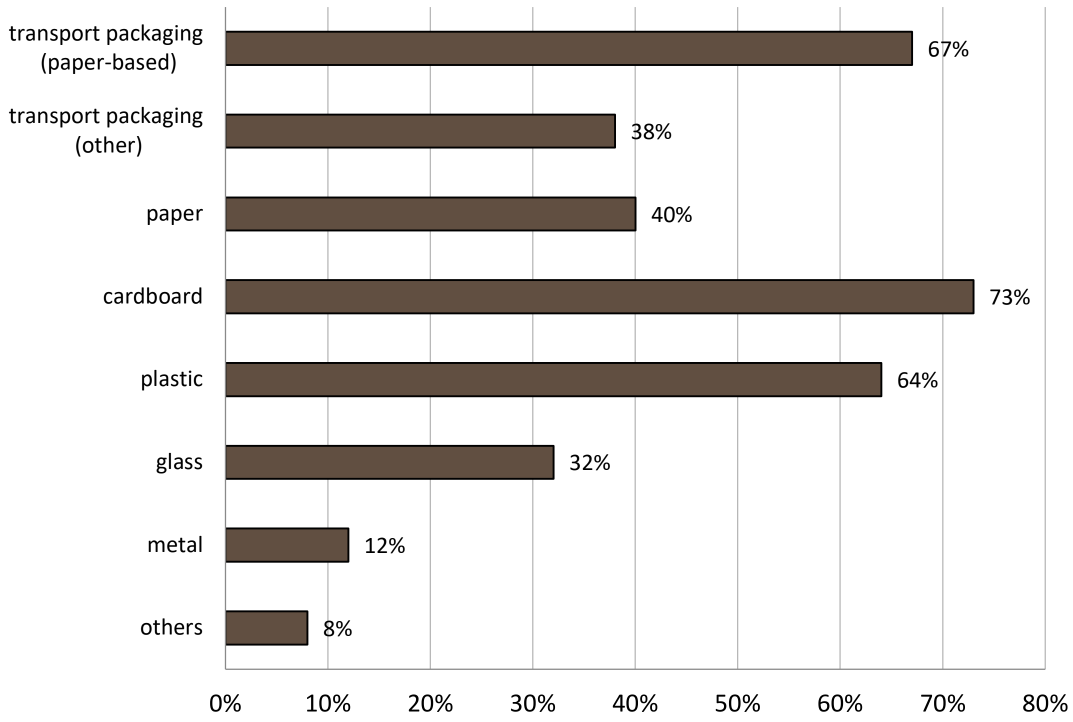

Figure 3: Q1: Packaging materials used by SME's (multiple selection possible) [%]

Figure 3 shows which packaging materials are used by the SMEs surveyed. Multiple selections were possible for this question. It is interesting to note that hardly any of the companies indicated that they use only one packaging material (excluding transport packaging). The most frequently used materials are cardboard and plastic. At only 12%, packaging made of metal is used least frequently. For transport packaging, 67% of the respondents stated that they use paper-based materials, 38% use transport packaging made of other materials.

When asked which resource-efficient packaging SMEs use, almost 60% said they use recyclable packaging. Around 40% of companies stated that they use reused packaging, reusable packaging, or packaging made from recycled materials. In relation, few companies use biodegradable or renewable packaging. 7% of respondents said they did not know what type of resource-efficient packaging they use (see Figure 4).

Table 1 shows the description of the status of innovation in the SMEs by different countries.

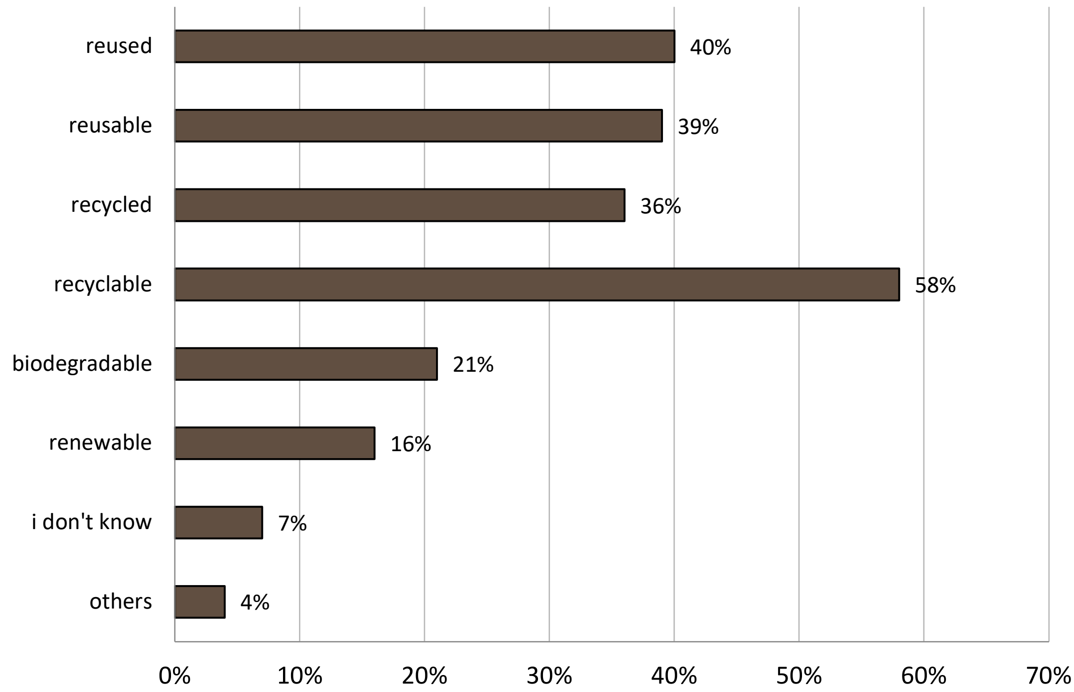

Figure 4: Q2: Type of resource efficient primary packaging SME's are using (multiple selection possible) [%]

Table 1: Q3: Description of the status of innovation in the businesses. Which innovative solutions are already implemented or are about to be introduced? (Open question)

Bulgaria:

14 out of 22 questioned Bulgarian SMEs answered that they have not implemented any innovative packaging solutions or are planning to introduce such.

The few of them that gave positive answer to this question said that they have done it because of transportation issues or because they are producing food products.

Austria:

Of the 22 companies surveyed, 12 stated that efforts were being made to implement sustainable packaging solutions or had already been implemented.

The efforts of the companies are primarily in the direction of plastic reduction or substitution in packaging.

The following planned or already used sustainable packaging solutions were mentioned:

- Using paper or cardboard packaging instead of plastic packaging
- Using compostable (composite-)packaging materials
- Using mono-composite plastic films
- Using rPET (PET from recycled content)

Some companies stated that they are trying to change their packaging, but there are different obstacles, like a low availability of suppliers for sustainable packaging and higher costs for sustainable materials, that hinder them. One company stated that they would like to implement reusable glass bottles if the washing of glass products were centrally regulated (deposit system).

Germany:

- Very few companies have developed specific new methods. There is mainly the use of the common German systems for returnable glasses and bottles:
- General use of returnable and reusable Glasses and bottles - Recup/Rebowl systems.
- One company claims to avoid any non-sustainable packaging until 2025 with these approaches.
- Avoiding any plastic at all and replacement by paper-based products.

Poland:

Almost half of interviewed businesses have introduced or plan to introduce eco-friendly packaging solutions. Answering the question 3, the answers were the following:

- the company has already introduced reusable packaging,
- returnable packaging being introduced or already introduced,
- avoiding plastic packaging and using glass instead,
- packaging made of recycled materials,
- plans to introduce reusable shipping packaging.

Figure 5 shows the SMEs' data on their expenditures on packaging as a percentage of their annual gross revenues. The figure shows that most companies spend a relatively small amount on packaging. Only 5% of all respondents spend more than 10% of their gross revenue on packaging.

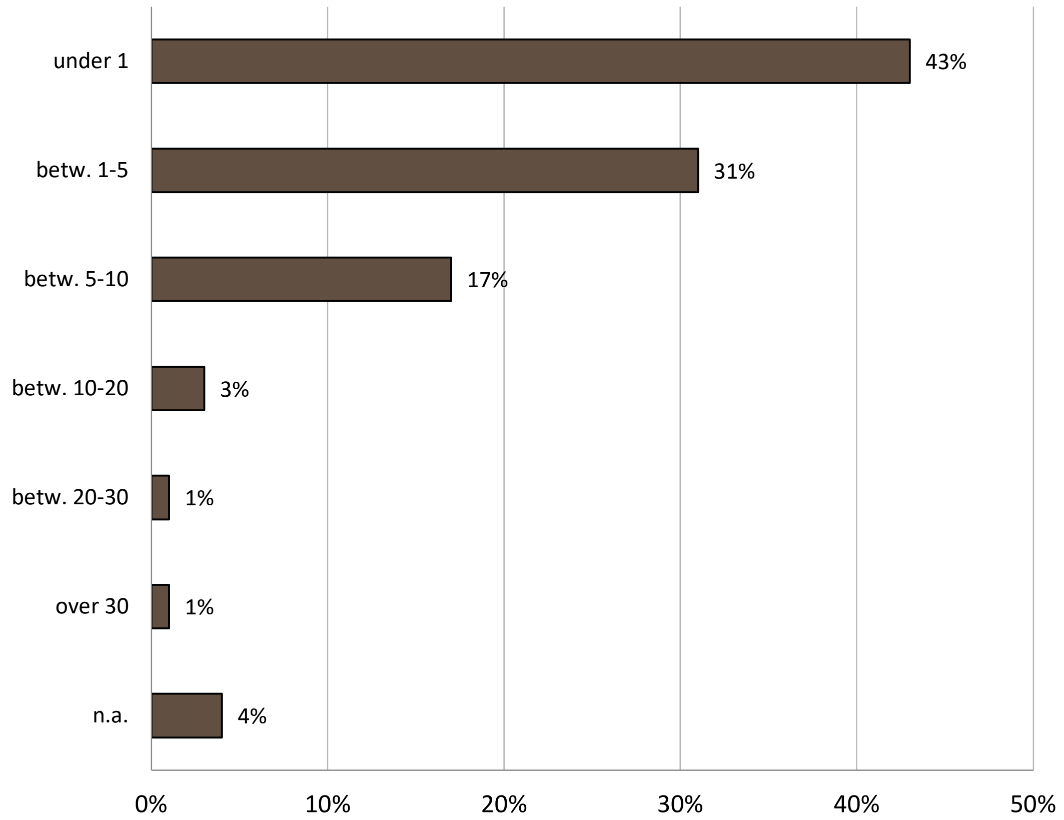

Figure 5: Q4: Percentage of gross revenue SME's spend on packaging materials per year [%]

When asked about the importance of packaging for the appearance of the product (Figure 6), the answers were relatively different. The reason for this is that very different industries were surveyed. Whereas for a food manufacturer, for example, the packaging serves as an important advertising space for the product, the appearance is usually relatively unimportant for the delivery of industrial goods. However, when asked about the main purpose of packaging (see Figure 7), a large proportion of respondents (79%) agreed that transport safety has the most important role of a package. In addition, hygiene and branding were also frequently mentioned as important purposes.

In table 2, the answers to questions 7 and 7.1 concerning existing optimization processes for packaging have been summarized according to the respective country.

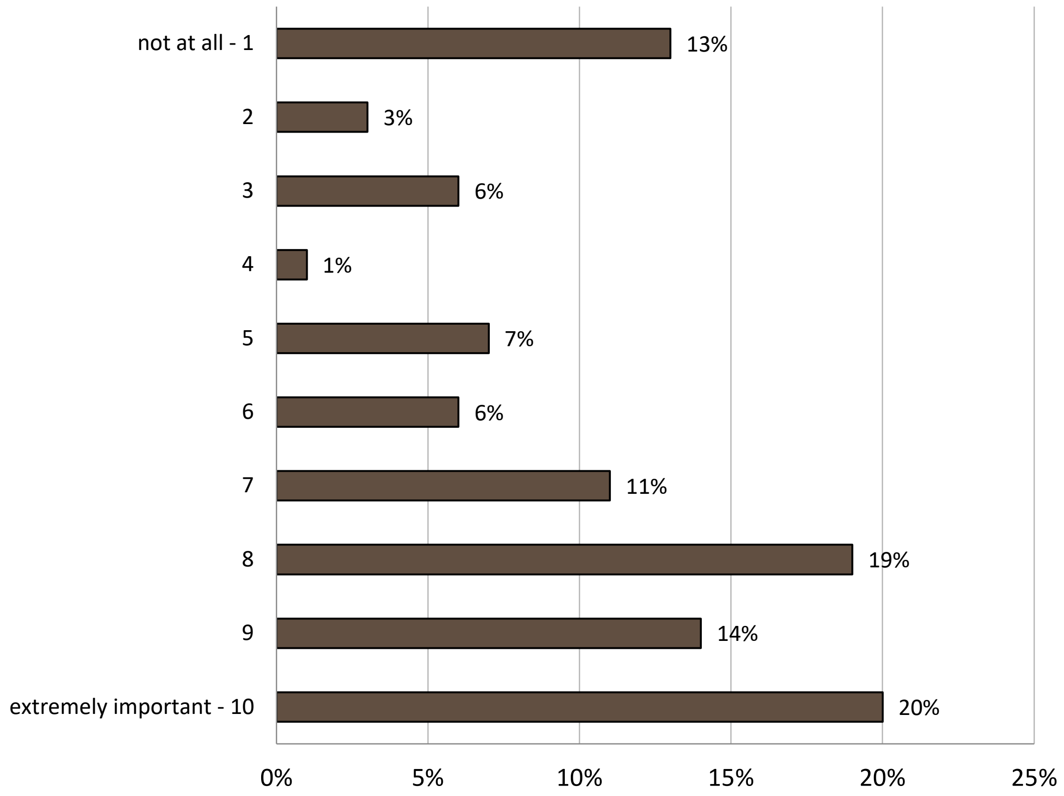

Figure 6: Q5: Importance of packaging for the look of SME's products (from 1 - not important at all to 10 - extremely important) [%]

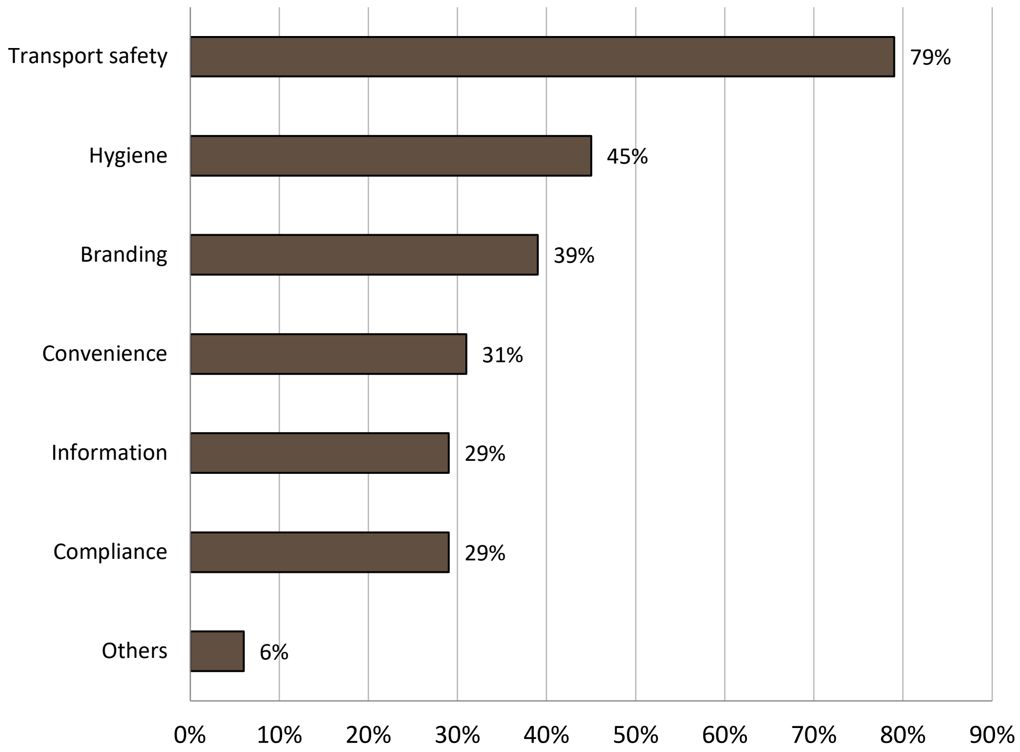

Figure 7: Q6: Main purpose of SME's packaging [%](multiple selection possible)

Table 2: Q7 and Q7.1 Description of processes to improve the packaging practices to become more sustainable. Are there processes in place? What do they look like? Which stakeholders are involved? Are parts of the value chain included in them? (Open question)

Bulgaria: None of the companies confirmed to have a regular process of improving the packaging practices to become more sustainable. Some of the companies said that they are observing the basic requirements as it concerns food products. Some of the companies said that they are observing the transportation requirements because of the specificity of their products and they are not able to change the package periodically. As a whole, there is a tendency in the opinion of the SMEs that they do not need such a regular process of improving because it is connected with other changes in the production chain which will come with more unplanned spendings.
Austria: Only one of the 22 companies surveyed stated that they have a regular process to improve current packaging practice. In team meetings the current research from the sector of the packaging industry is discussed, analyzed and further processed within the framework of a CIP (=continuous improvement process). Five of the companies stated that a process exists but it's not regular. One company stated that they regularly strive to optimize packaging in terms of product safety, sustainability, and price optimization. For this purpose, they also cooperate with research institutions such as the FH Campus Wien for packaging technology. Other companies stated that they improve their packaging practice through contact with customers and suppliers and examination of alternatives for more sustainable packaging.
Germany: Almost none of the companies established a general process. The main point is the general observation of the market and competitors. Some companies answered that, If there are interesting and appropriate approaches, they will be discussed internally and introduced if possible. Some companies stressed their approach to avoid packaging whenever possible (by hygienic standards in the food production). Other internal measures are discussions on sustainability in Team-Meetings. Only one company has a regular and strategic process including stakeholders as suppliers.
Poland: None of the companies had a regular process in place. Some of them have a vague process, or parts of the process, that helps them to improve. For example, one company is searching for a producer of recycled carton boxes for making shipments, as it is difficult to find one in Poland that also has a more sustainable way of operating. One company has introduced boomerang jars, which are returnable jars. They have seen from their experience what could work and learnt on their mistakes. Another interviewee said that there is a problem in researching eco-friendy packaging options in Poland. Most of the time, none of the stakeholders are involved, as the companies must be resourceful and come up with the ideas and their implementation themselves.

3.3 Challenges for sustainable packaging

The third part of the questionnaire addressed interest, general knowledge about sustainable packaging and the challenges SMEs see in switching to sustainable packaging solutions.

Table 3 provides an overview of the different views of SMEs regarding the benefits of switching to sustainable packaging.

Table 3: Q8: Do businesses see a benefit in switching to more sustainable packaging options? Which benefits are most visible? Are the benefits specific to certain sectors or packaging products? (Open question)

<table>
<tr><td>
Bulgaria:
Half of the questioned Bulgarian SMEs said that they do not identify such a need in order to transform their packages to more sustainable ones and that is why they haven't thought of the potential benefits. Some other SMEs said that they cannot decide because they are not well informed of the potential benefits and they need more information in order to decide. Just 8 of the Bulgarian SMEs clearly confirm that they see the benefits in using sustainable packaging solutions for their products because of saving material resources and keeping the environment safe.
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Austria:
The majority of the companies surveyed see a benefit in switching to more sustainable packaging. The most frequently mentioned reasons were:

Climate and environmental protection
Conservation of resources
More acceptance by customers

Furthermore, two companies mentioned benefits in disposal costs and waste reporting fees.
It was striking that six of the companies surveyed stated that a major advantage was customer acceptance. One company even stated that it personally sees no advantage in this except that customers are asking for more sustainable packaging solutions. This result illustrates that the desire for sustainable packaging solutions is growing among customers and that this is also increasing the pressure on companies to meet these demands.
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Germany:
There is a broad variety of answers. Some companies see no advantage at all in sustainable packaging. Others mention:

Cost reduction
Less use of resources

One company answered very detailed, that the avoidance of plastic means
less use of resources (less costs!)

Waste reduction (less costs!)
Less costs for packaging

Less contribution to the German dual system for recycling plastic waste.
Approximately half of the companies stressed the general advantage of CO2 reductions, mitigating Climate Change etc.
</td></tr>
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Poland:

Most of the interviewed companies saw the value of introducing eco-friendly packaging in their branding, marketing, and image. Most of them also value sustainability in general, but some said it also reduces waste, resources used, and at the same time - money. One interviewee said, “Reduction of batch packaging ensures more space in the warehouses and some money savings”. One interviewee also stated that it has to do with their own identity as a person: “I see it in the means of brand image and identity, and being authentic in your values by not producing waste from packaging”

The companies surveyed were asked to rank various factors that influence the decision to change packaging in order of importance. They were asked to choose between 1 (not at all important) and 6 (very important) for each factor. Figure 8 lists the results according to the various influencing factors. Similar to question 6 (Fig. 7), two-thirds of the respondents state that they see the protection of the product as the most important decision factor for changing the packaging. It is interesting to note that the "financial benefits" factor scores very similarly to "sustainability considerations." This shows that some companies are already addressing the issue of sustainability within the company. However, there are also different views here depending on the industry or country of origin (see Q8).

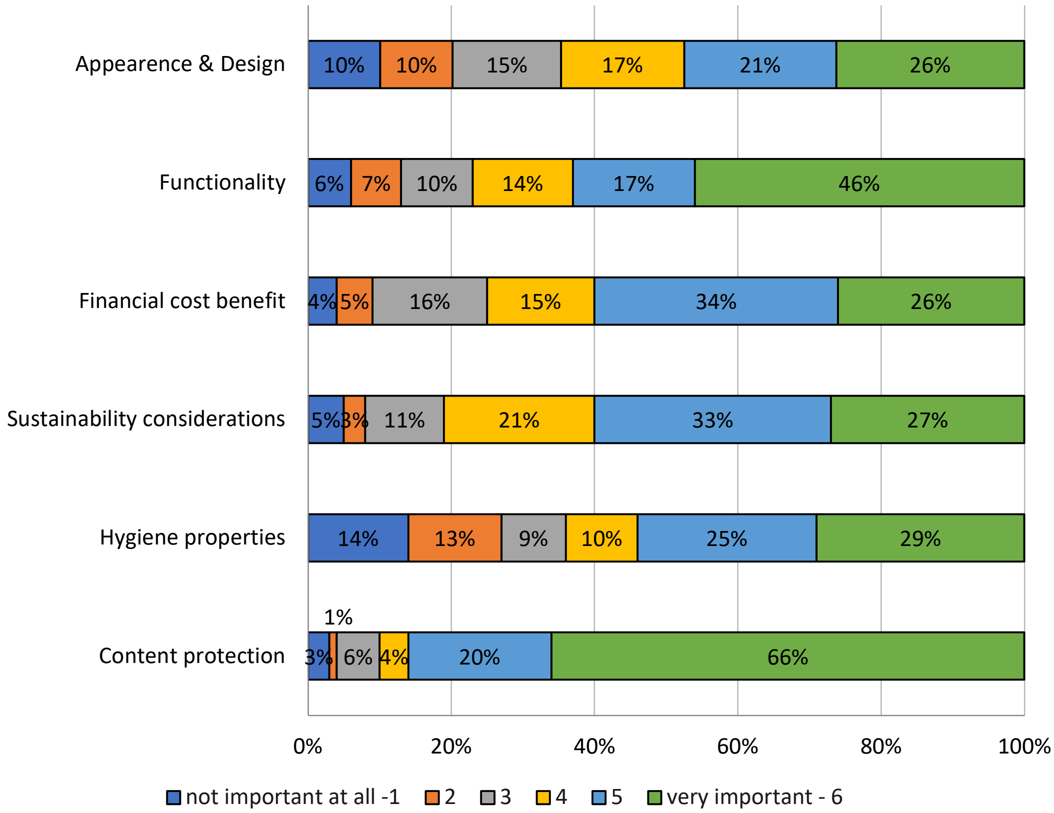

Figure 8: Q9: Importance of different factors in SME's decision to switch packaging [%]

To determine the level of knowledge of SMEs about sustainability and its legal basis, question 10 asked about knowledge of selected regulations and directives related to sustainable packaging. The result in Figure 9 illustrates that there is still a need for clarification regarding the legal framework, as 30% of the respondents stated that they were not aware of any of the regulations/directives mentioned. At 41%, the Packaging and packaging waste directive was the most familiar directive. Regarding the other regulations, less than 35% of the SMEs stated that they were aware of them.

In addition, the SMEs were asked to rank the different waste management pathways (recycling, reuse, landfill and energy recovery) in the correct order from 1 (most sustainable) to 4 (least sustainable). Only 19 of the 100 respondents ranked the pathways in the correct order (reuse > recycling > energy recovery > landfill). It was interesting to note that some respondents placed reuse and recycling (and in some cases energy recovery) on the same level.

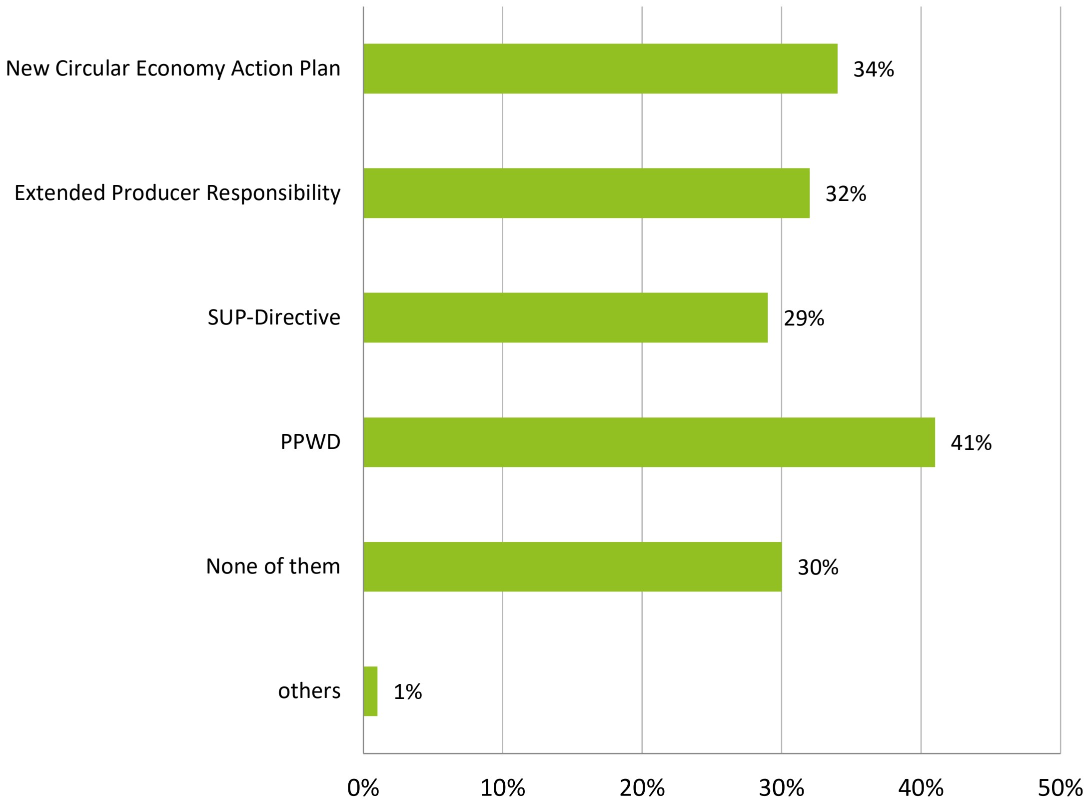

Figure 9: Q10: Which of the legal regulations and directives SME's have already heard of? [%] (multiple selection possible)

Table 4: Q12: How are customers informed about the right disposal of packaging? (Open question)

Bulgaria: Most of the 22 BG SMEs answered that they are following the regular labeling instructions for informing about the recycling procedures and nothing more is conveyed to the customers.
Austria: Some of the companies surveyed stated that they inform the customers via labels on packaging (recycling code/disposal icons/logos/Triman). Some of them stated that they provide additional information on their websites and/or social media platforms. 11 companies indicated that they do not inform their customers at all. One company stated that the space on the packaging would not allow for any other information besides the recycling code. Another company noted that uniform labeling across countries would be desirable, as they also sell their goods to other countries.
Germany: B2C businesses inform the clients directly during the selling-process. Concerning Paper and Cardboard are no extra information necessary, because they must be disposed of by the clients directly. Only one company states, that clients will be informed through the website.
Poland: Most of the interviewees said that their customers are not informed about the right disposal of the packaging. Some of the remaining answers included putting a sticker or an information on their packaging, posters and information in their store, dialog with the client.

The following figure illustrates which challenges SMEs see in the switch to sustainable packaging solutions. The result shows that the challenges are very diverse, and there are also industry-related differences here. Away from the given selection, 10% of the companies gave other reasons as the biggest challenge in changing packaging. Reasons given included the high cost and purchase volumes for sustainable packaging, the risk of green washing, and the limited choice of sustainable packaging with sufficient protective function.

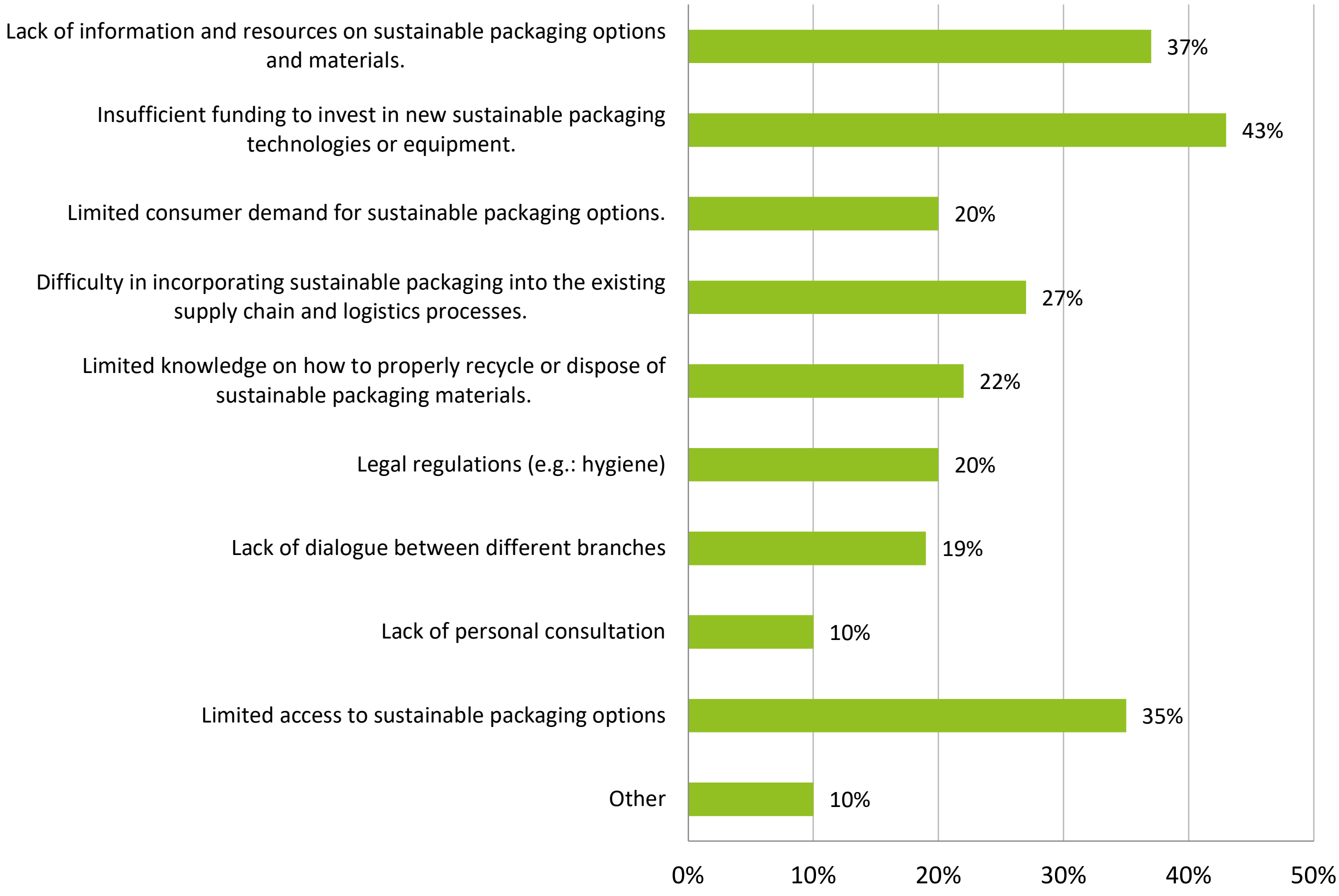

Figure 10: Q13: Which of these reasons are the biggest challenges for SME's to switch to more sustainable packaging? (Multiple selection possible.)

Table 5: Q14 and 14.1: Which barriers in SMEs supply-chains hamper the uptake of more sustainable packaging solutions? (Open question)

Bulgaria: 15 out of the 22 BG SMEs said that they do not have obstacles for more sustainable packaging solutions but they haven't yet come to this point in their business development to have sustainable goals, thinking about the environment. Most of them said that they are more focused on sales and profit which in most of the time is associated with cheap and not so much sustainable solutions or with lavish packaging solutions in order to attract the customers.
Austria: 50 % of the companies surveyed stated that there are obstacles in their supply chain that hinder them in the transition to a more sustainable type of packaging. To this question, the answers were very individual, as the companies surveyed operate in different industries and therefore the products also have different packaging requirements. The answers are summarized/listed below:

Packaging suppliers/Production: • not enough choice of packaging suppliers offering sustainable solutions. • Suppliers produce in other countries (mainly in Asia) - decision between sustainable packaging vs. regional production. • Materials must meet the requirements of already existing machines. • Minimum order quantity, costs for sustainable packaging are too high. • Transparency of suppliers is missing: what is the packaging made of? Where do the raw materials come from? Transport/Product safety: • Packaging must meet minimum requirements (hygiene, migration issues, mechanical stability, cooling, etc.) - especially important in the food sector. Sustainable packaging solutions often cannot meet these requirements. • Weight plays an important role in transport for wholesalers - plastic is superior to other packaging in this area. • Transport regulations ADR (=European Agreement concerning the International Carriage of Dangerous Goods by Road)/ CLP (=Classification, Labeling and Packaging of substances and mixtures) Retail: • Glass deposit is far too low. • These newer, more sustainable materials naturally cost more and therefore reduce the margin - but consumers are only willing to pay more for more sustainable products to a certain extent.
Germany: There is huge variety of answers to this point: • It is stressed, that packaging has to be secure and has to avoid any transport damage. The testing of new and sustainable products is cost intensive. Neither companies nor clients are interested in any cost increase. • The gastronomy has difficulties to obtain unpackaged vegetables. Vegetables are mostly packed with a lot of plastic. • The shipping industry is not always helpful in order to provide sustainable solutions. • Laws on food hygiene are inflexible. • The main problem is human laziness. • Laws are needed to enforce sustainability. • It is not always clear, which kind of packaging along the entire value and production chain is the more sustainable one. • Special products for the needs of pharmacies are not available. • Suppliers cannot deliver the ordered sustainable products.
Poland: The answers included: • Some products are destroyed during transportation • During delivery it's not possible to negotiate packaging or storing conditions. • Sanitary law is limiting when it comes to supply packaging and storing.

• There are some problems with suppliers, and sometimes plastic packaging during transport is just way cheaper. • Logistically, financially - cleaning the boomerang jars is a costly process • We are dependent on the supplier • Logistic and economic problems: who should pay for the cost of returning the packaging? • I don't have influence on the type of packaging being used by my suppliers. Those are chemical products, there is no way yet to package them sustainably. Most of the problems revolve around shipments and the suppliers not willing (or not being able) to change the shipment packaging to a more sustainable one. Finances also play a big role in this inability to become more sustainable.

Table 6: Q15 and 16: What kind of incentives or external resources could help SMEs to overcome some of the existing challenges in switching to more sustainable packaging? (Open questions)

Bulgaria: In general, all the questioned 22 SMEs said that the biggest obstacle and motivator for moving to more sustainable packaging could the financial support in the form of grants. Secondly, all the companies confirmed that they need more awareness, training and information for sustainable packaging solutions because since they are SMEs they do not have R&D departments and the managers are usually the ones who need to investigate and be informed for this matter.
Austria: The survey provided a relatively clear picture of what support would be desirable/required for SMEs to switch to more sustainable packaging solutions. The most frequently mentioned wishes/requirements related to financial support, lower material costs and more information about sustainable packaging solutions. Some wishes/approaches of the surveyed SMEs are mentioned below: Comparable prices of packaging materials with conventional solutions. Customers (retailers) are not willing to implement increasing prices. • More information about available sustainable packaging, examples of best practices and financial incentives. • Raising awareness among end customers • More input from the packaging industry, sustainable packaging also for small batch sizes <10,000 bottles, better exchange with suppliers on truly sustainable packaging solutions without the "greenwashed blah blah". • a cost covering deposit for glass bottles • Financial incentives if packaging consists of certain percentage of recycled/recyclable material, more info/choice on recycled/recyclable packaging • A purchasing group for sustainable standard packaging (minimum order quantity often too high for small companies, high costs for sustainable packaging), joint use of cleaning system for reusable bottles, possibly central deposit system, uniform standards EU-wide or in DACH-region (Germany, Austria, Switzerland).

• Legal regulations and subsidies. EU-wide regulations and certificates. • more information about recycling and disposal
Germany: Several companies stressed the financial aspect: Financial support for the development of more sustainable packaging and financial help is needed to establish sustainable systems. Others mentioned again a huge variety of different approaches: • There is no influence by companies how their providers do the packaging. • Reusable Cling Wrap would be a great invention. • More flexible Laws on Food Hygiene are needed is mentioned by several companies. • Best practice examples are needed. • There is a need to provide solutions for all related industries.
Poland: A lot of answers stated that additional funding is crucial to help small companies go through the process of improving packaging and choosing more sustainable materials or ways of operating. There were also answers focusing on knowledge and availability of different handbooks or guides to sustainable packaging. One answer stated that the incentives that could help small businesses to overcome the challenges would be “evening the chances between suppliers and lowering the price of carton boxes, because now the cheapest option is a foil packaging”. Some of the interviewees also saw that there is a need for systemic changes, like law changes or European directives.

4 Conclusion

The evaluation of the questionnaire showed in part relatively large differences in the attitude of SMEs regarding the topic of sustainable packaging. The range varied from very strong interest to indifference towards the topic. The challenges in switching to sustainable packaging solutions are also very diverse - partly industry-related or also country-specific. Despite the different perspectives, the points financial aspects, lack of information about existing offers (best practice), the characteristics of sustainable packaging and legal basics and the lack of exchange among each other could be identified as the biggest challenges in switching to sustainable packaging.

The main takeaways of the conducted survey research are as follows:

- A relevant part of businesses have no information about the sustainability of their packaging.
- Many SMEs are lacking sufficient resources or funding for a shift towards more sustainable packaging.
- Even if funding sources exist, businesses do not know where to look for them.
- SMEs are worried sustainable packaging cannot provide sufficient transport safety.
- A lack of a common standard to define the term “sustainable packaging” is resulting in many businesses being confused about which packaging products have a better ecological performance.

Based on the results of the questionnaire, the approximate structure of the planned MOOC platform was determined during a workshop together with all project partners. The main topic areas are as follows (order not yet determined):

- legal provisions, current legal requirements, legal aspects and legal changes that will be implemented,
- implementation, inspirations, examples (new solutions),
- change management, staff management, SWOT analysis, effective change of eco-habits, persuasion techniques,
- sustainability term, client perspective, marketing, branding, CSR , (eco-campaign in social media),
- technical aspects: requirements of packed products, circular packaging design, sustainable packaging options, ecological raw materials, sustainable packaging options.

In addition, a persona was created from the results of the survey within the workshop and questions for 30 additional interviews were derived in order to concretize the stated topic areas.

5 Annex 1: Questionnaire Template

PackLess

Questionnaire for Sustainable Packaging

In the EU-funded Project PackLess the consortium consisting of 5 Partners from 4 EU-countries seeks to support small- and medium-sized businesses to achieve their sustainable packaging transition. We would appreciate your responses to the questions below, that will be used to build a learning-tool for businesses and for providing further insights to the European Commission. Filling out the survey should take only a couple of minutes and provides a basis for the success of the PackLess Project.

Data security notice:

While your contact data is collected in the survey, for any publications resulting from the collected data no names or other identifying information will be included in any publications or presentations based on this questionnaire, and your responses will remain confidential. All collected data will be stored locally and only accumulated and anonymized data will be published.

The answers will be included in our evaluation without your company being specifically identifiable. The aim is to obtain general insights for the specific needs of medium-sized companies. By providing us with your contact details, you agree to the processing in the aforementioned sense.

Questions about the business

Name of the business:

____

Contact person:

____

Contact email address:

____

M1: Business sector:

☐ Food and beverages

☐ Textiles

☐ Industrial goods

☐ Household appliances

☐ Service sector

☐ Automotive

☐ Other: ____

M2: Number of employees (Full-Time Equivalents):

☐ 1- 10 employees

☐ 11 – 50 employees

☐ 51 – 250 employees

☐ Over 250 employees

M3: Is your organisation a for-profit business?

☐ Yes

☐ No

M4: Do you have contact with the end customer of your products?

☐ Yes

☐ No

M5: Country your business is located in:

____

M6: What is the expansion of the value-chain of your product(s)? (Production and sales)

☐ local

☐ national

☐ international

State of the packaging practice

Q1: What types of packaging are you using? (Multiple selection possible)

☐ Transport packaging (paper-based)

☐ Transport packaging (other)

☐ Paper packaging

☐ Cardboard packaging

☐ Plastic packaging

☐ Glass packaging

☐ Metal packaging

☐ Others: ____

Q2: What type of resource efficient primary packaging are you using?

☐ Reused (as packaging product)

☐ Reusable (as packaging product)

☐ Recycled (as material)

☐ Recyclable (as material)

☐ Biodegradable

☐ Renewable (wood, bamboo, …)

☐ I don’t know.

☐ Other: ____

Q3: Are there new packaging innovations that you have implemented/are thinking of implementing?*

Q4: What percentage of your gross revenue do you spend on packaging materials per year?

☐ Under 1 %

☐ Between 1 % and 5 %

☐ Between 5 % and 10 %

☐ Between 10 % and 20 %

☐ Between 20 % and 30 %

☐ Over 30 %

Q5: How important is packaging for the look of your products (scale: 1-10, 1 as not important at all and 10 extremely important)

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10

Q6: What is the main purpose of your packaging?

☐ Transport safety

☐ Hygiene

☐ Branding

☐ Convenience

☐ Information

☐ Compliance

☐ Other: ____

Q7: Does your company have a regular process to improve current packaging practices? (Please choose one option.)

☐ Yes, there is a regular process in place.

☐ Yes, there is a process, but it is not regular.

☐ No, but we are planning to implement a regular process.

☐ No, we do not have a regular process in place and are not planning one.

Q7.1: If yes, please shortly elaborate on the process:*

Challenges for sustainable packaging

Q8: Do you see a benefit in switching to more sustainable packaging options? Please elaborate:*

Q9: Please rate the following factors on their importance in your decision to switch packaging from 1 (not important at all) to 6 (very important).

Appearance & design	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6
Functionality	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6
Financial cost benefit	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6
Sustainability considerations	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6
Hygiene properties	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6
Content protection	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6

Q10: Which of these legal regulations and directives have you already heard of? (Multiple selection possible.)

☐ New Circular Economy Action Plan

☐ Extended Producer Responsibility

☐ Single Use Plastic Directive

☐ Packaging and Packaging Waste Directive

☐ None of the above

Others: ____

Q11: Please sort these waste management pathways from most (1) to least sustainable (4) according to your opinion:

Material Recycling __

Re-Use __

Landfill __

Energy Recovery __

Q12: Please elaborate how your customers are informed about the right disposal of your packaging:*

Q13: Which of these reasons are the biggest challenges for you to switch to more sustainable packaging? (Multiple selection possible.)

☐ Lack of information and resources on sustainable packaging options and materials.

☐ Insufficient funding to invest in new sustainable packaging technologies or equipment.

☐ Limited consumer demand for sustainable packaging options.

☐ Difficulty in incorporating sustainable packaging into the existing supply chain and logistics processes.

☐ Limited knowledge on how to properly recycle or dispose of sustainable packaging materials.

☐ Legal regulations (e.g.: hygiene)

☐ Lack of dialogue between different branches

☐ Lack of personal consultation

☐ Limited access to sustainable packaging options

☐ Other: ____

Q13.1: If you chose "Other" please elaborate:*

Q14: Are there obstacles in your supply chain that hinder your transition to a more sustainable type of packaging?

☐ Yes

☐ No

Q14.1: Please elaborate why/why not:*

Q15: What kind of incentives could help your business overcome some of the existing challenges in your transition to sustainable packaging?*

Q16: What other external resources would help you to transition to more sustainable packaging? (Optional)*

Would you like to get informed about the progress of the PackLess Project? (There will only be two newsletters throughout the 30 month duration of the Project.)

☐ Yes

☐ No

Thank you for taking the time to fill out the survey in the name of the whole PackLess consortium!

Please send the filled out survey via email to the following address: example@email.eu

We aim to support small and medium enterprises in the course of their sustainable packaging transition. If you have any questions about the project or the survey, please reach out to us.

Die Fachhochschule des Mittelstandes (DE)

PAIZ Konsulting (PL)

Ekopotencjał (PL)

Yambol Chamber of Commerce and Industry (BG)

Das Österreichische Ökologie-Institut (AT)