



# **ECR** **CIRCULAR ECONOMY** **WEBINAR SERIES**



## **WEBINAR 2: Consumer Demand in the Circular Economy**

How retailers and manufacturers can address consumer demand through circular economy projects?

**Tuesday, 14th January 2020; 14:00 CET**

**PLEASE TYPE ANY QUESTIONS INTO THE CHAT FUNCTION AND TIME PERMITTING WE WILL TRY TO ANSWER THEM.**



# TODAY'S AGENDA

## Introduction ECR & Circular Economy from a Consumer Perspective

- Teresa Mischek-Moritz, Managing Director ECR Austria

## Who Cares, Who Does?

- Natalie Babbage, Global LinkQ Director, Worldpanel Division, Kantar

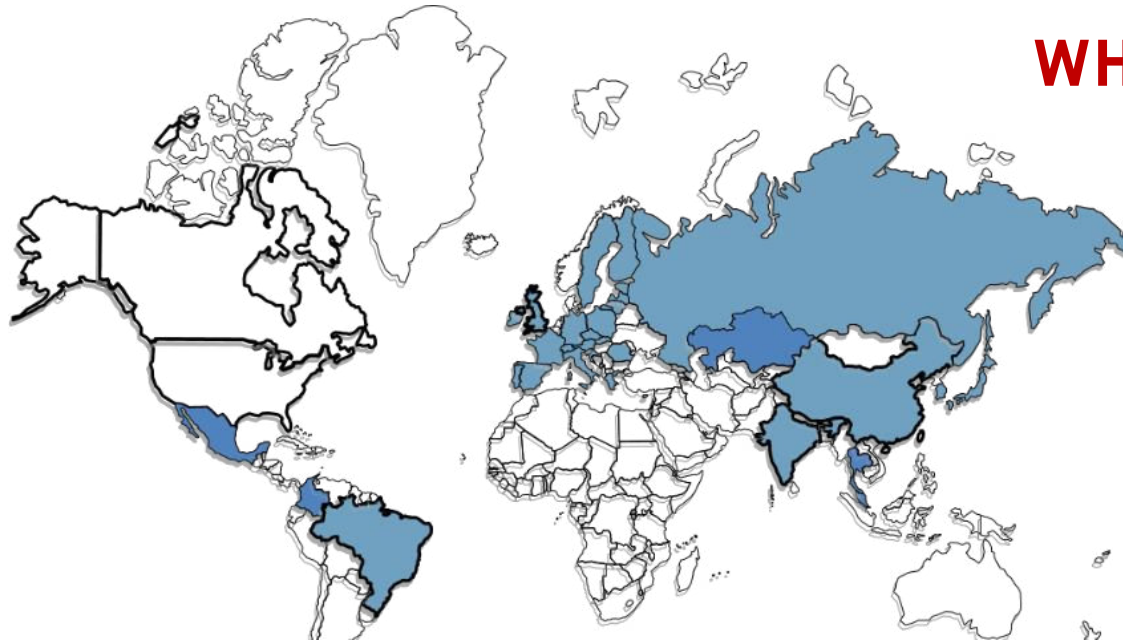
## The Future Belongs to Zero Waste E-Commerce

- Hugues Pelletier, Founder and CEO Petrel SAS

## Q&A

## Our Speakers





## WHAT IS ECR COMMUNITY?

The **global association** for all ECR organisations in the Retail & Consumer Product Group sector

A **not-for-profit**, membership association

Its members are made up of:

1. ECR Nationals
2. ECR Expert Groups (e.g. Shrink & OSA Group)
3. Industry Representative Associations

## WHAT IS ECR (EFFICIENT CONSUMER RESPONSE)?

ECR is a **collaboration** model:

"Transforming the way we work together to **fulfil consumer wishes better, faster and at less cost**"

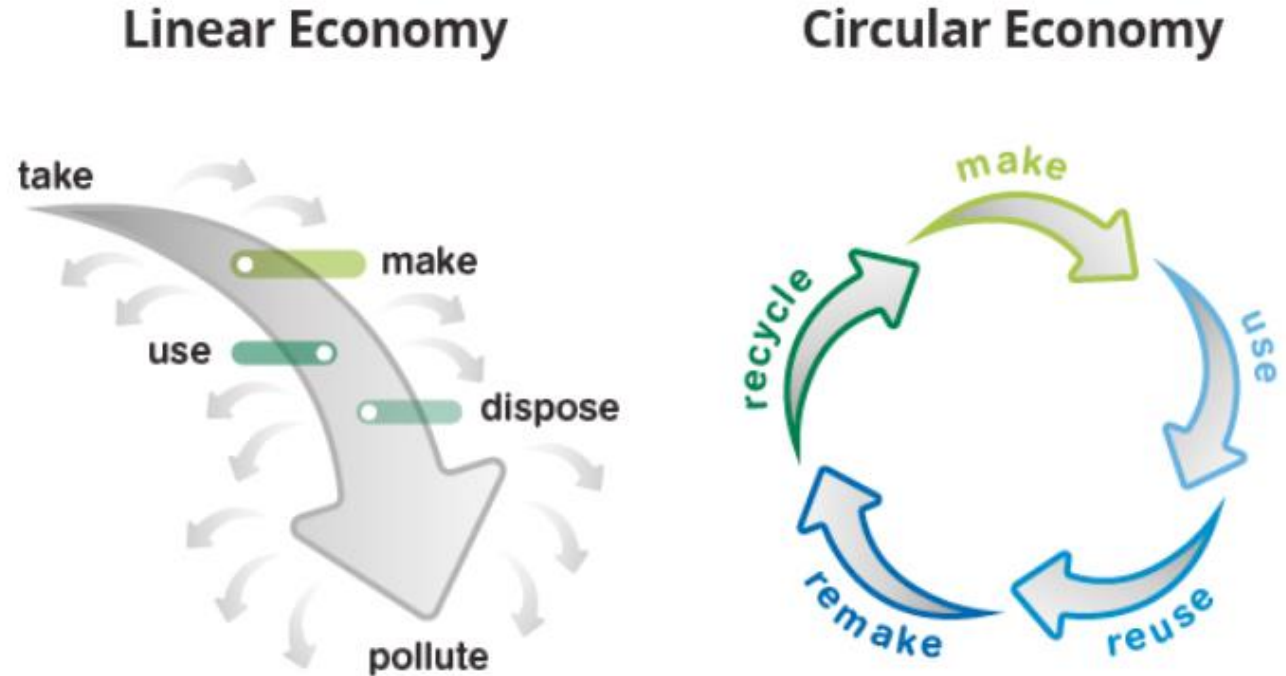
# WHAT IS THE **CIRCULAR ECONOMY**?

## WHAT?

A NEW WAY TO **DESIGN, MAKE** AND **USE** THINGS WITHIN THE BOUNDARIES OF OUR PLANET

## HOW?

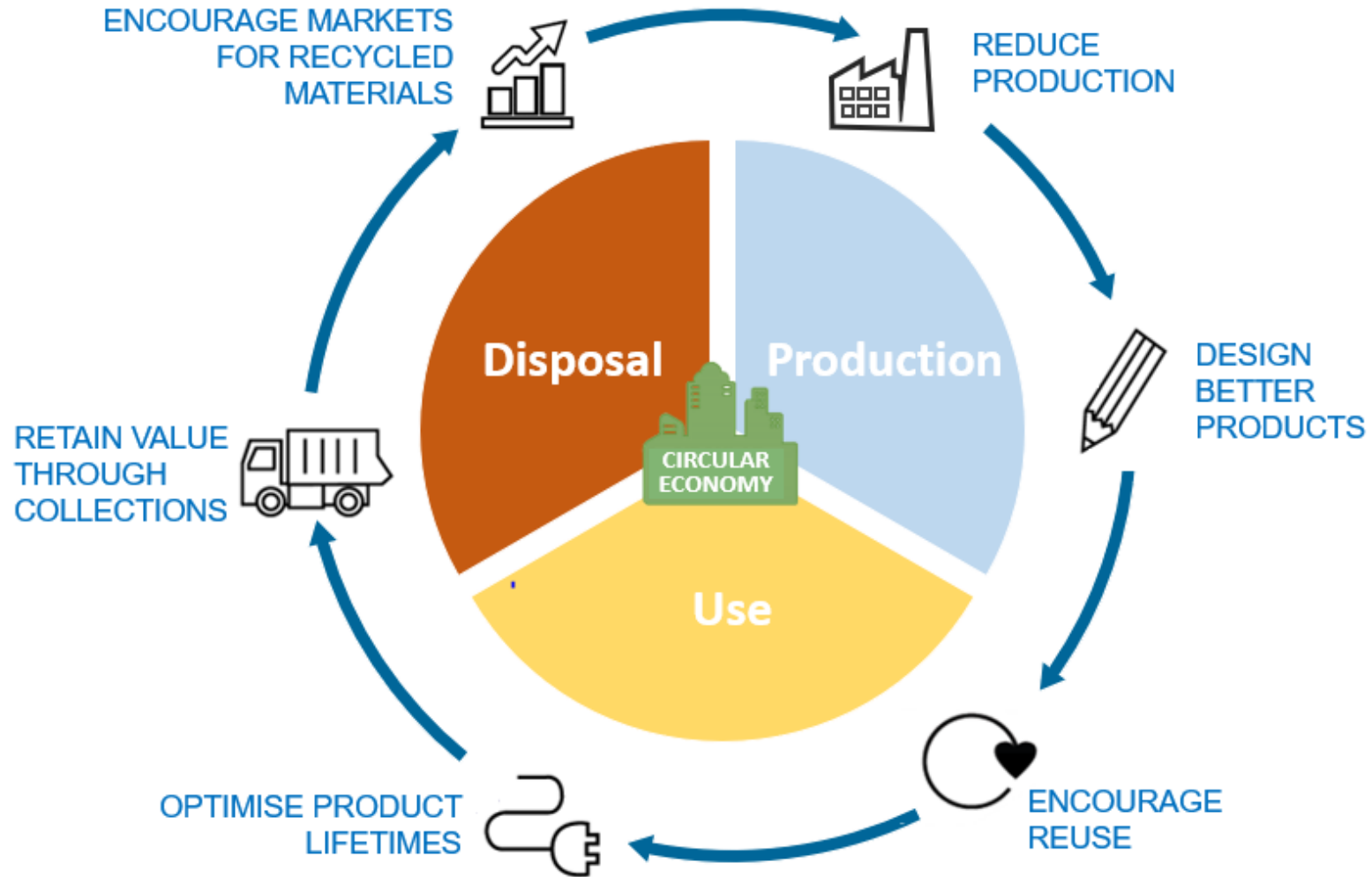
BY REDUCING WASTE AND MAXIMISING THE USE OF OUR RESOURCES



SHIFTING FROM LINEAR TO CIRCULAR



# HOW IT APPLIES TO **YOUR BUSINESS**



The KANTAR logo is positioned in the top left corner. It features the word "KANTAR" in a bold, black, sans-serif font. The letter "K" is distinguished by a vertical yellow bar on its left side. The background of the entire slide is a photograph of two large, crumpled plastic bags floating in the ocean. The top half of the image shows the sky and the surface of the water, while the bottom half shows the bags submerged, illustrating the concept of hidden or unseen issues.

# KANTAR

## Who Cares, Who Does? – ECR Webinar

Natalie Babbage

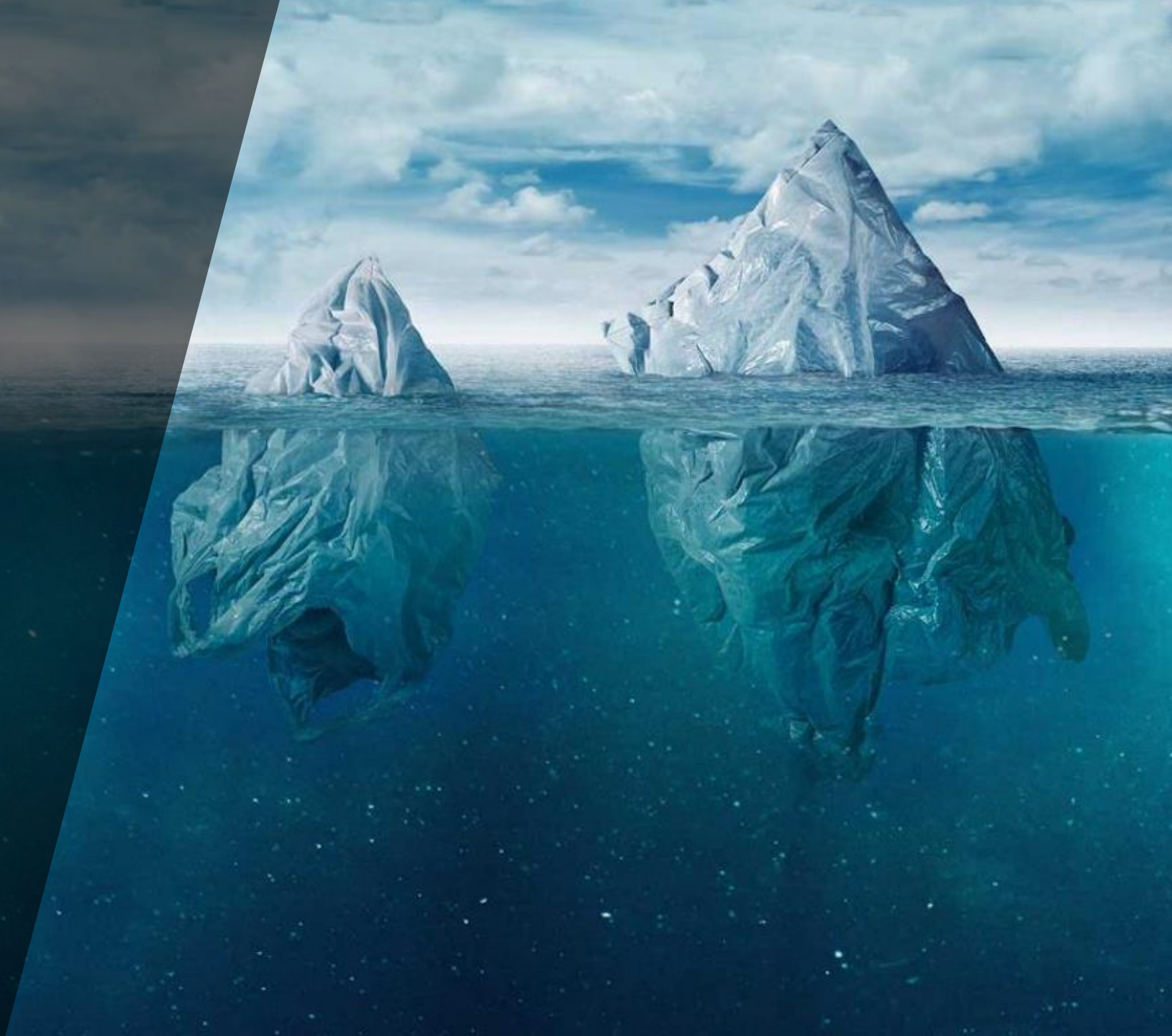
Global LinkQ Director

Worldpanel Division, Kantar

Jan 2020



**Understanding the  
'green gap' between  
those who say they  
care and those that  
actually do something  
about plastic waste  
with a global lens**



# Our first ever global study on consumer attitudes

65,000 interviews

## Countries

Argentina, Austria, Belgium, Brazil, CAM, Chile, China Mainland, Colombia, Czech Republic, Denmark, France, Germany, Hungary, Indonesia, India\*, Mexico, Netherlands, Peru, Poland, Russia, Slovakia, Spain, Sweden, UK, US\*\*



Global issues &  
Consumer engagement



Products  
& packaging



Consumer  
actions



Brand  
& retailer actions




WHO CARES?  
WHO DOES?



We are at a crossroads  
with the health of our  
planet. **43%** of consumers think  
manufacturers have the  
most responsibility to  
act





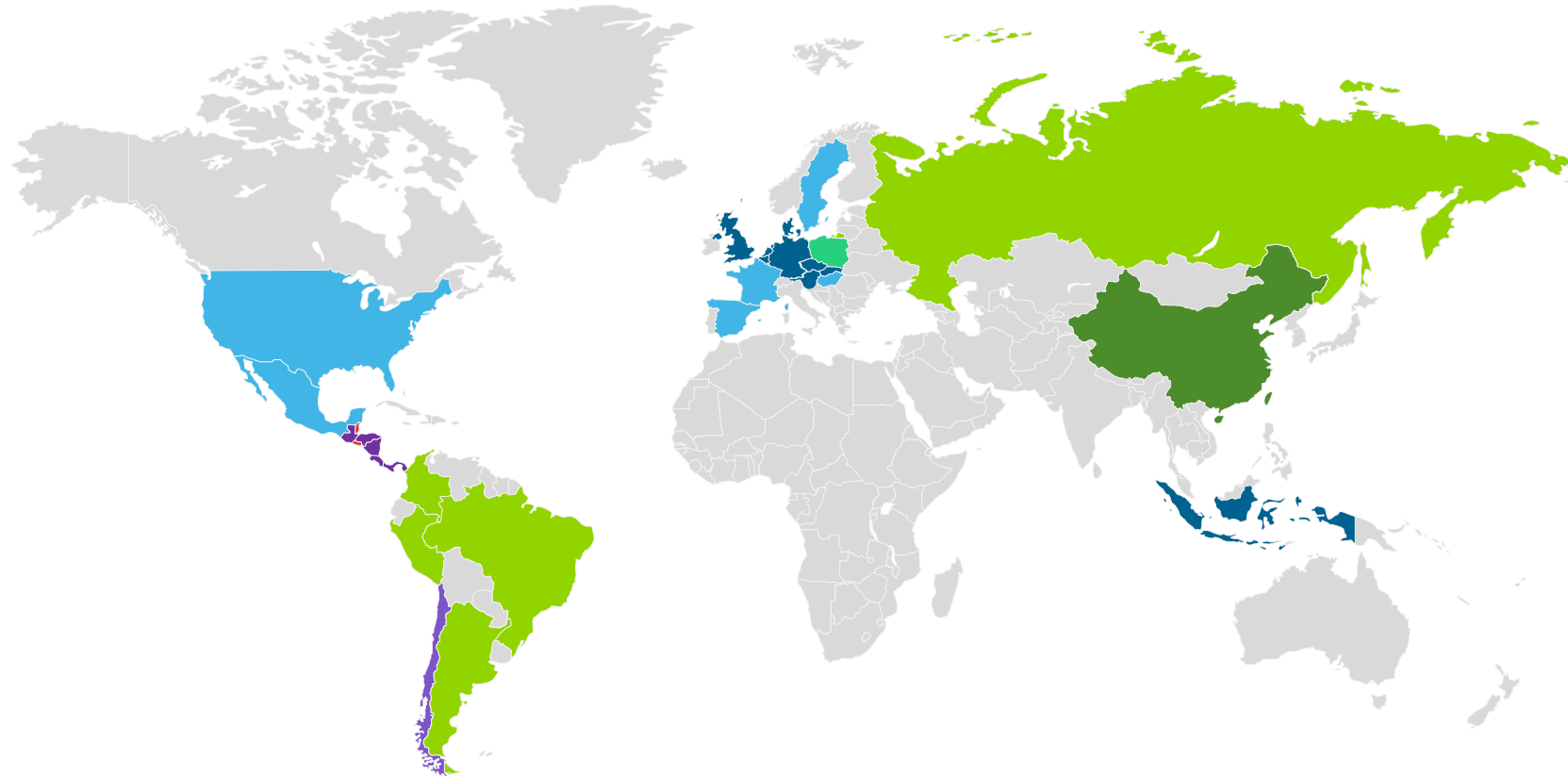
WHO CARES?  
WHO DOES?

1

Who cares  
What are consumers  
concerned about?

# Climate change number 1 concern globally, but regional differences in consumer concerns suggests a one size fits all global communication will not be effective

- Water Pollution
- Climate Change
- Plastic Waste
- Air Pollution
- Food Safety
- Water Shortage



WHO CARES?  
WHO DOES?

2

Who does?  
Plastic waste



# Most people are routinely bringing their bags when shopping and containers to refill water

When you get to the actions that are more inconvenient or hard to find the number of consumers regularly doing drops a lot

What actions do I take? Always or Frequently %

**>60%**

- Taking reusable bags
- Using rags for cleaning
- Refilling water

W. Europe  
>70%

**>50%**

- Bring lunch
- Avoid single use cutlery for at home parties
- Drink tap water

W. Europe  
>60%

**>30%**

- Reusable hot drink cup
- Bar Soap
- Choose stores without plastic for fresh wrapping
- Avoid plastic toys and homeware

**>20%**

- Avoid drinks in plastic bottles
- Usable Baby, cotton pads or Fem
- Try not to buy products wrapped in plastic

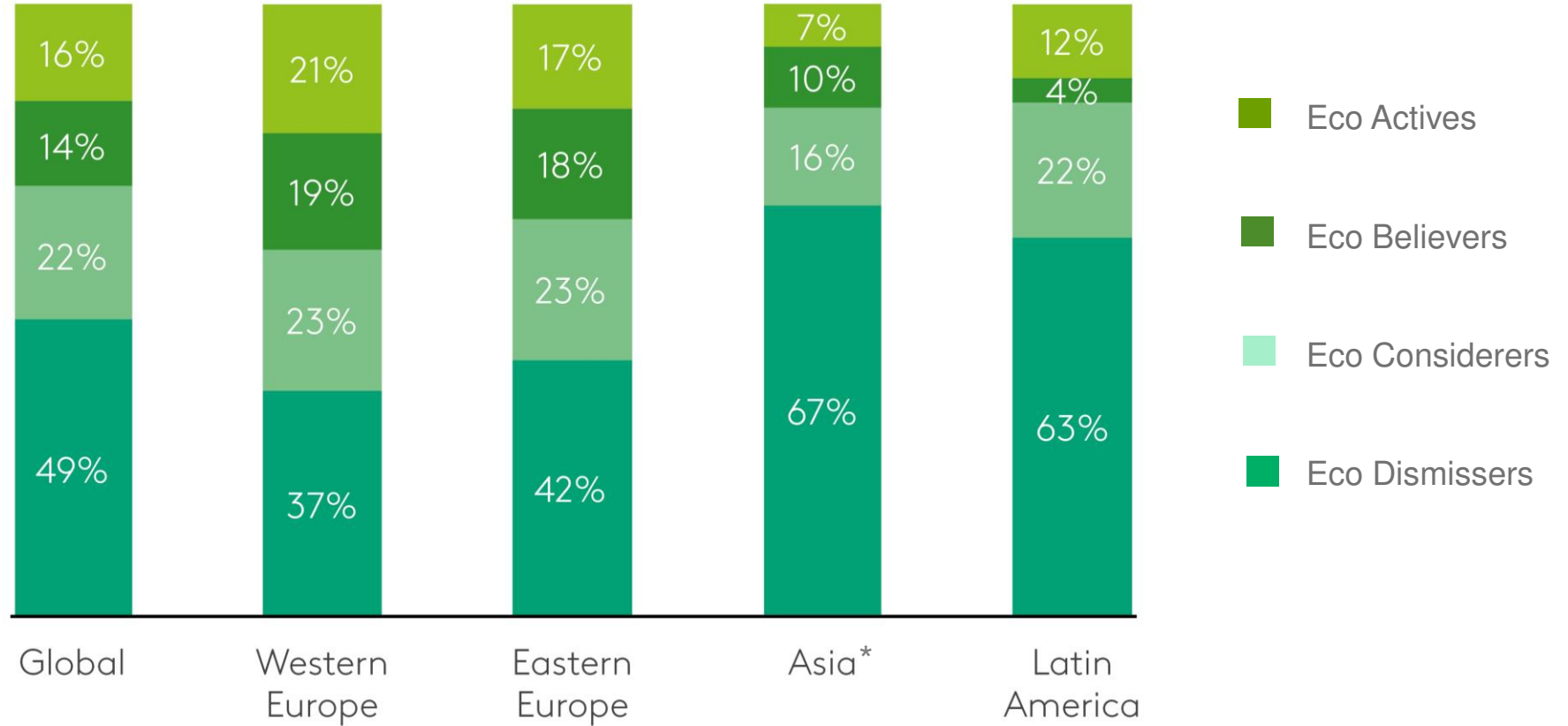
# Introducing our segments



# Actives make up 16% globally and this increases to 21% in Western Europe

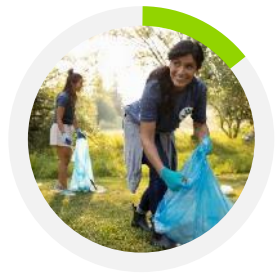
## More than 50% of consumers are engaged and taking some small actions

Eco segments by region



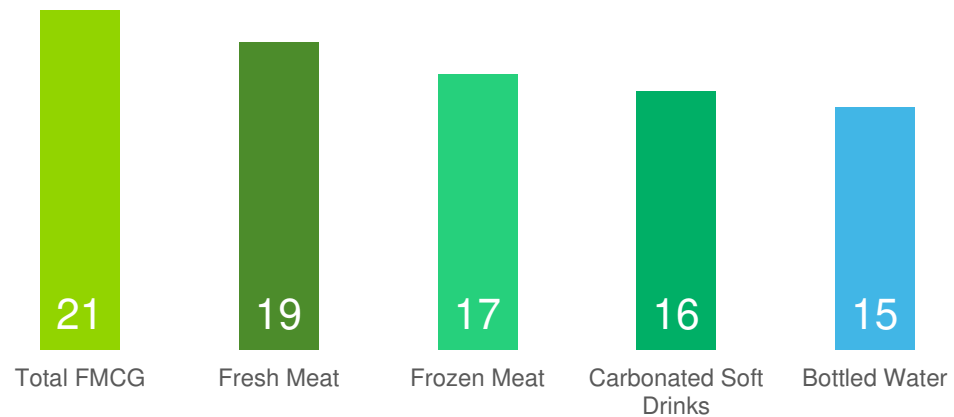
# Our most engaged group - They do purchase differently

**16%**  
Eco Actives



## Spend less on

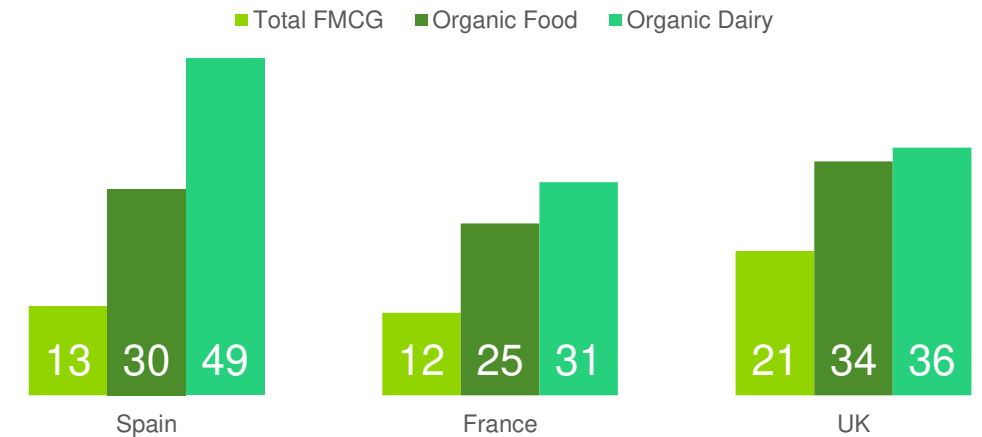
■ Meat and bottled soft drinks



UK Eco Actives share of category spend

## Spend more on

■ Organic dairy and food and eco friendly labelled brands (such as homecare)



Eco Actives share of category spend



WHO CARES?  
WHO DOES?

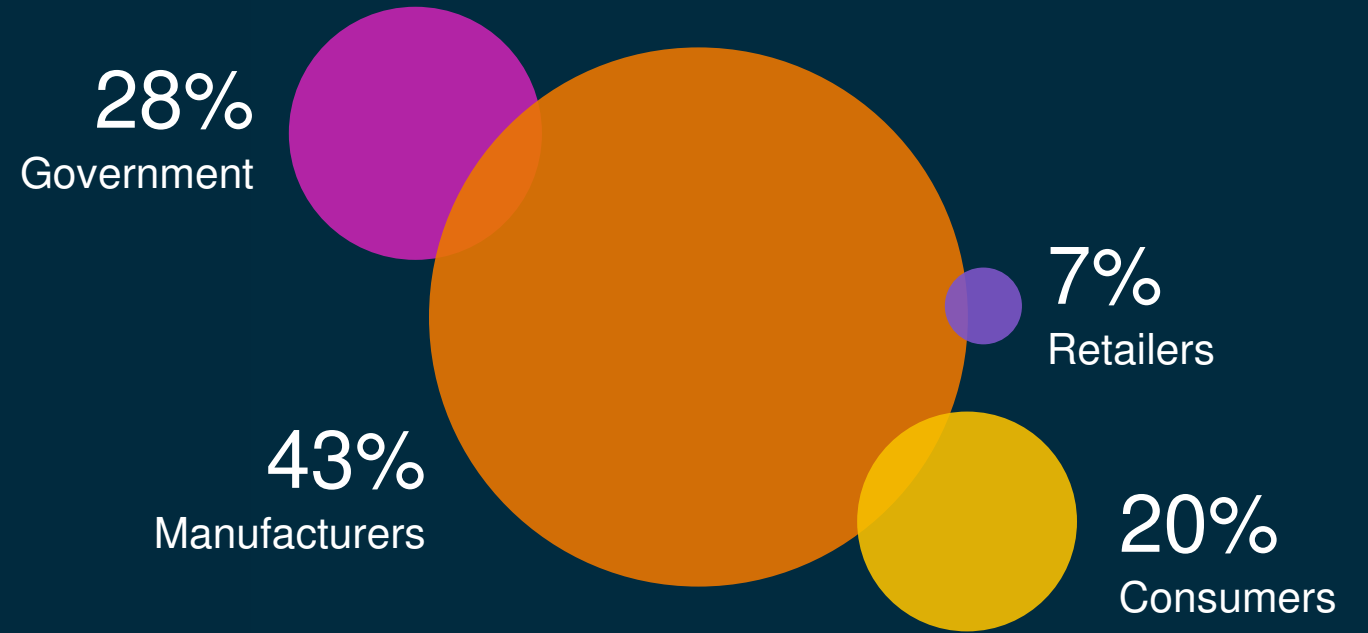
3

Manufacturers



# Manufacturers seen as responsible for addressing the problem

Who is the most important to act on plastic waste?





**Only 12%**

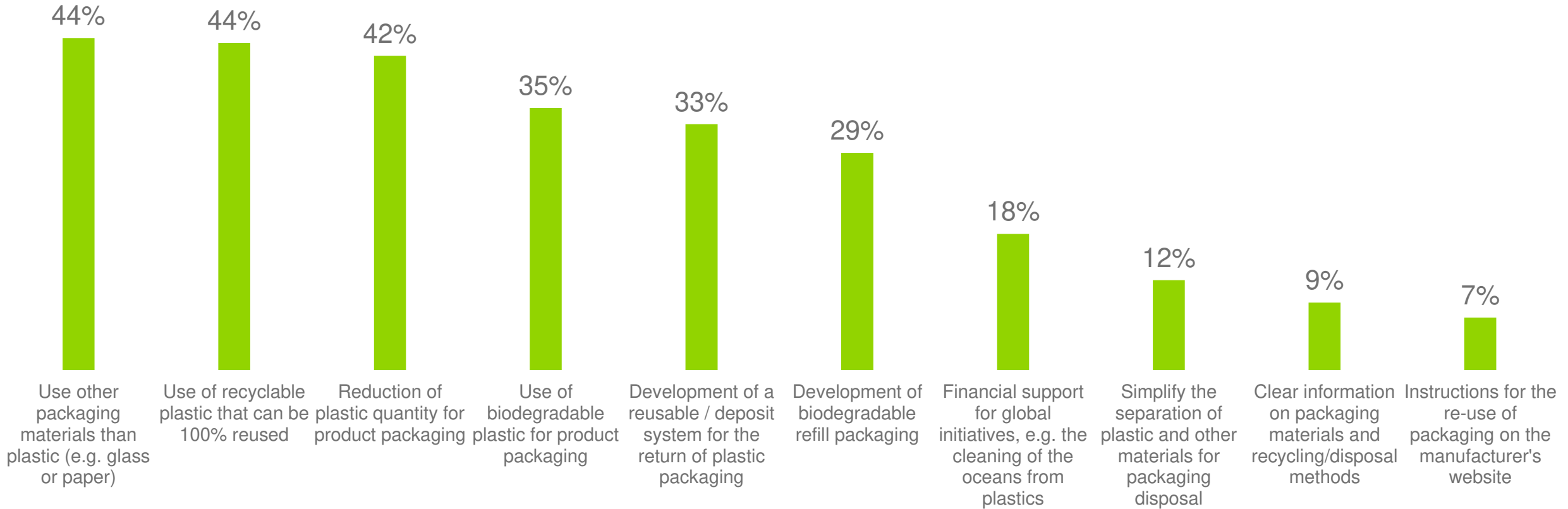
**of respondents could  
name a manufacturer  
doing a good job**



# Changing materials completely and recyclable materials were top consumer asks

What are the important approaches manufacturer should take to help and limit plastic waste?

GLOBAL



WHO CARES?  
WHO DOES?

4

Retailers





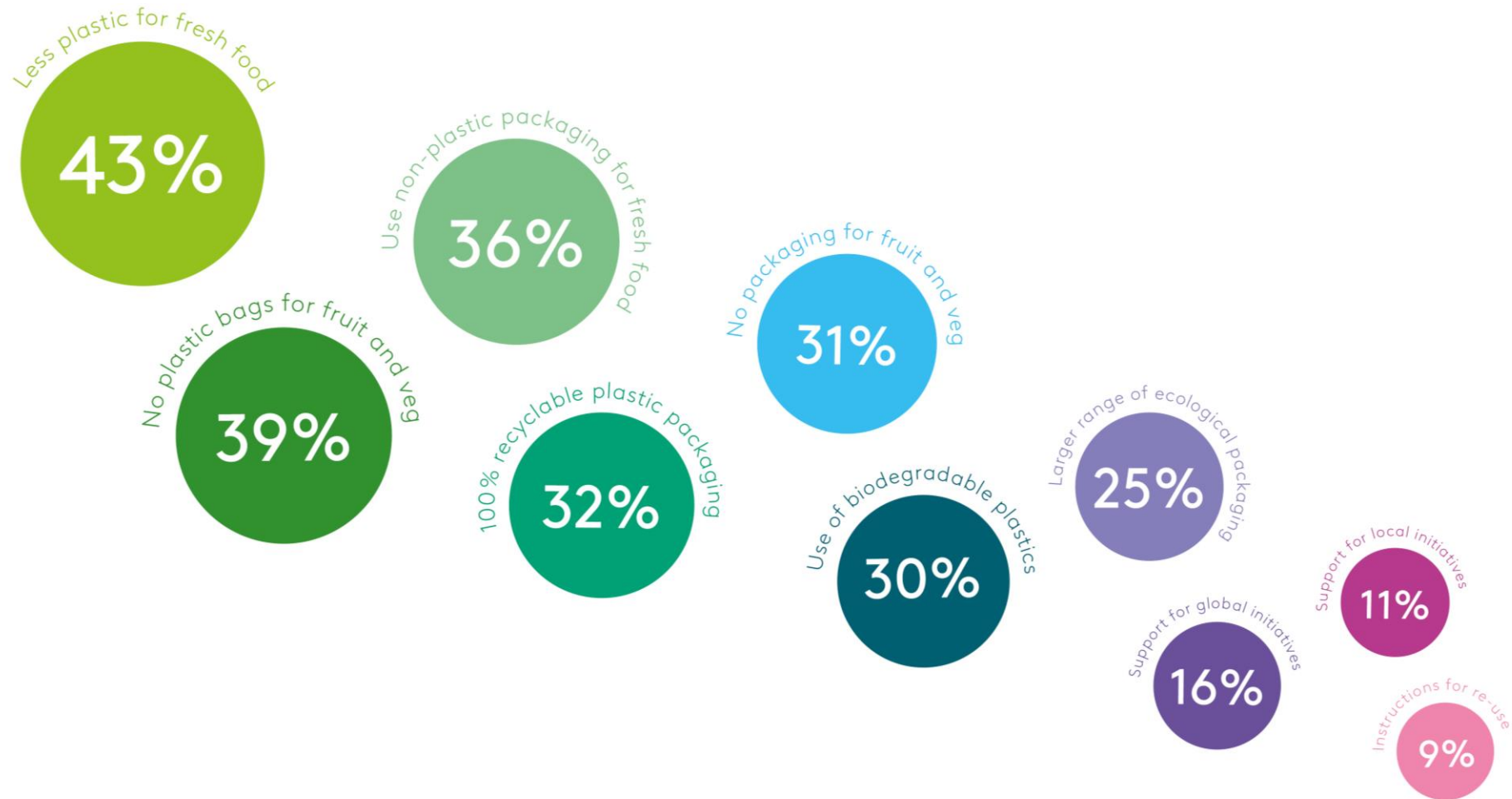
**Retailers are doing  
a better job in eyes  
of consumers**

**17%**

**can name at least one**

# The fresh and chilled area needs the most action in consumer's eyes

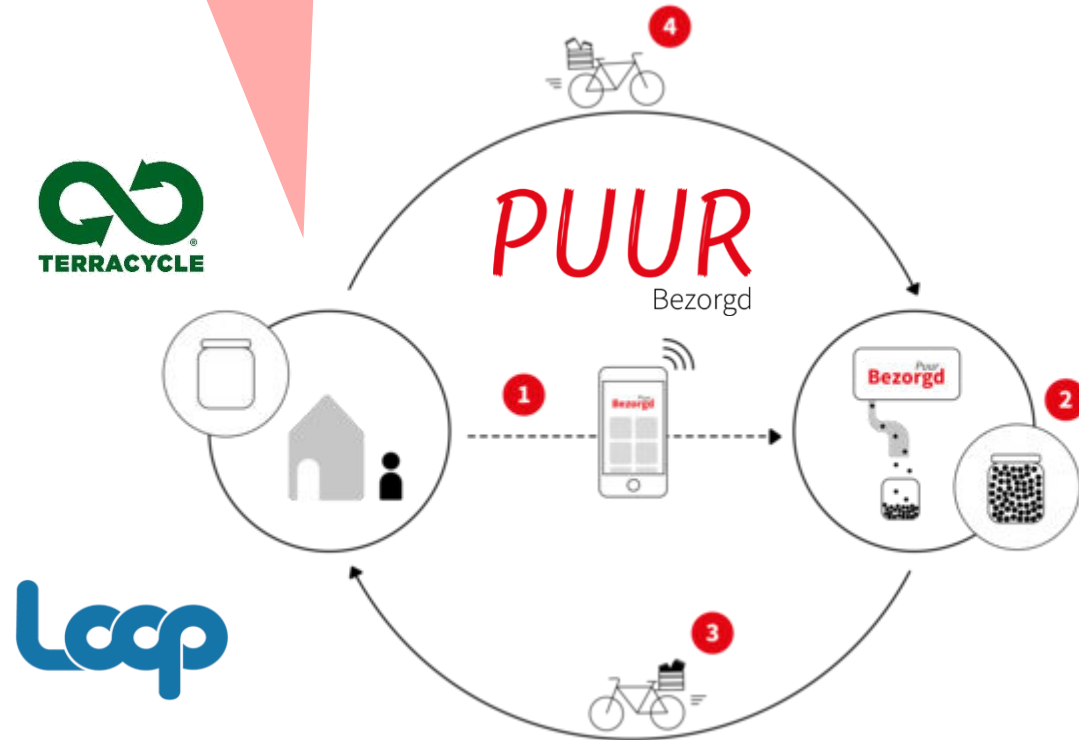
What are the important approaches retailers should take to help and limit plastic waste?



# Plastic waste will become a point of differentiation between retailers

# WHO CARES?  
WHO DOES?

As new alternatives to shop will arise



Retailers will demand solutions from manufacturers to differentiate their offer





Either **#PlasticPrivilege** retailers take matters into their own hands. **WHO CARES? WHO DOES?**  
..Or brands help create a win-win-win with innovative alternatives





**Consumers care, but expect manufacturers to lead the way and not to charge extra for doing the right thing**



**There are a core group of consumers taking actions called Eco Actives and they make up 16% globally and >30% in Austria, Germany**



### **Manufacturers should**

- Communicate more as their pledges and actions are not cutting through
- Replace and remove single use plastic where possible
- Make a holistic brand story with packaging alongside other benefits such as natural



### **Retailers should**

- Start with removing packaging in the fresh aisles or communicate to consumers the trade offs
- Partner with brands to develop new ways of presenting the category



### **Both should**

- Simplify advice and ideally create a unified score or traffic light on overall footprint
- This is a confusing space for even the most engaged and most people are not – make it clear where products have benefits in store and how they are helping reduce water/ air pollution

## Find out more

Download the report at [www.kantar.com/worldpanel](http://www.kantar.com/worldpanel)

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Additional information on innovation can be supplied if needed. Please get in touch with your usual contacts at Kantar or with Natalie Babbage

[natalie.babbage@kantar.com](mailto:natalie.babbage@kantar.com)





**Future belongs to  
zero waste e-commerce**



**Hugues Pelletier**

**Jan 14th, 2020**

# Loop is a global platform enabling reuse of qualitative, innovative and zero waste packagings

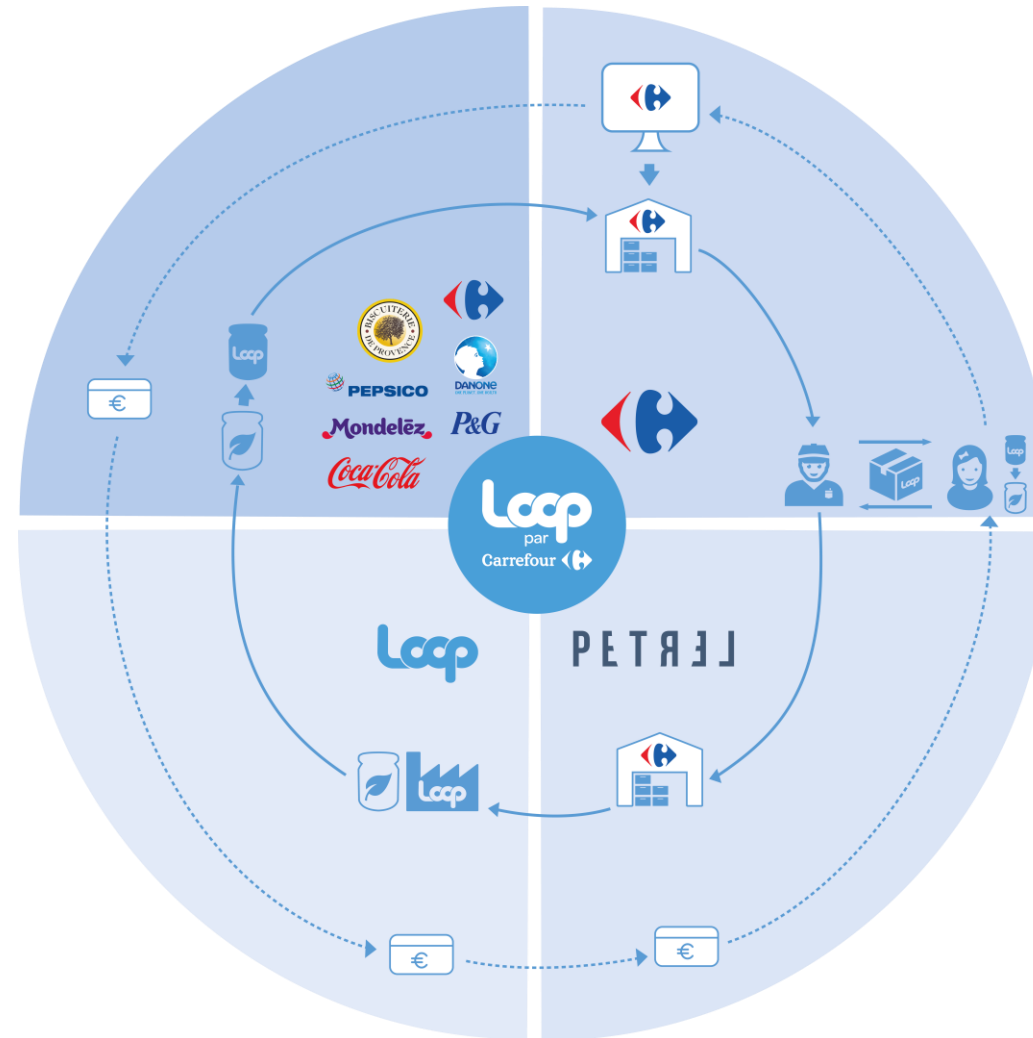


=> +130 CPG manufacturers have signed Loop partnership worldwide

# Loop par Carrefour customer journey : Returnable bags to allow circular approach

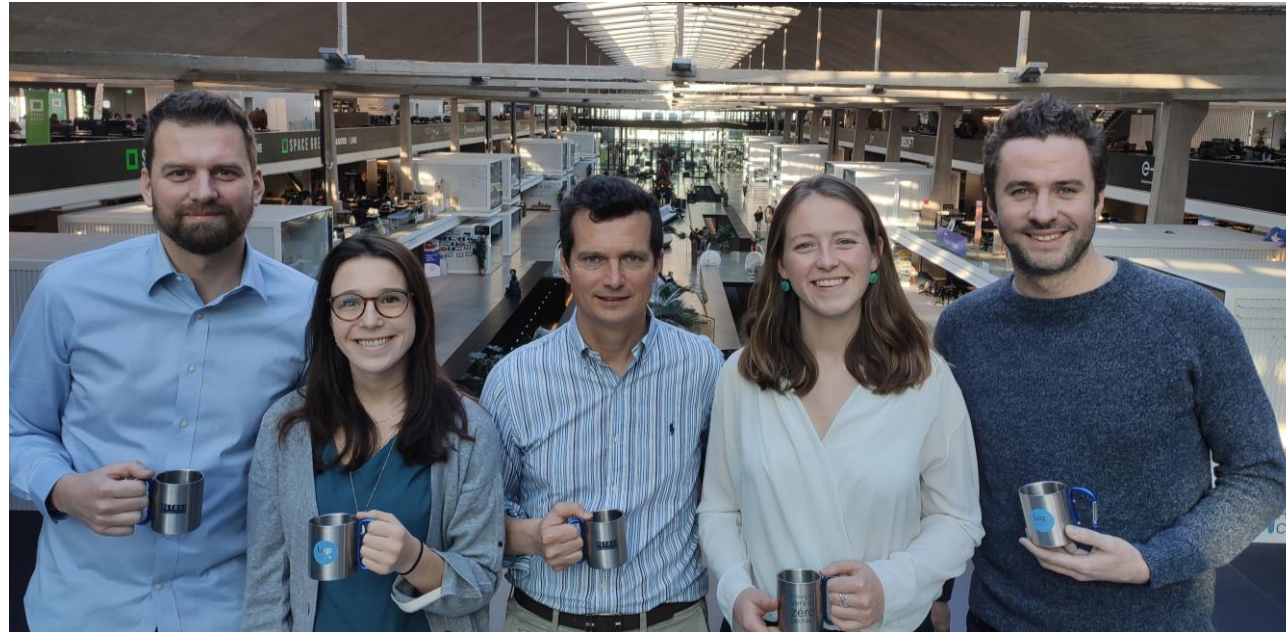


# Petrel is enabling Loop within Carrefour with a retailer integrated model



- Petrel proposes a Zero Waste as a Service approach with 4 modules :
- Reverse logistic
  - Refund management
  - Customer service
  - Returning bags follow up

# Ready to embark on zero waste journey?





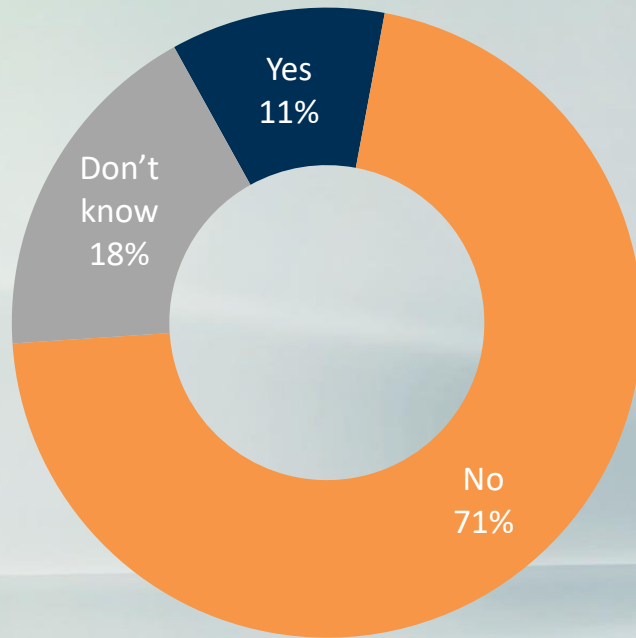


# QUESTIONS & ANSWERS

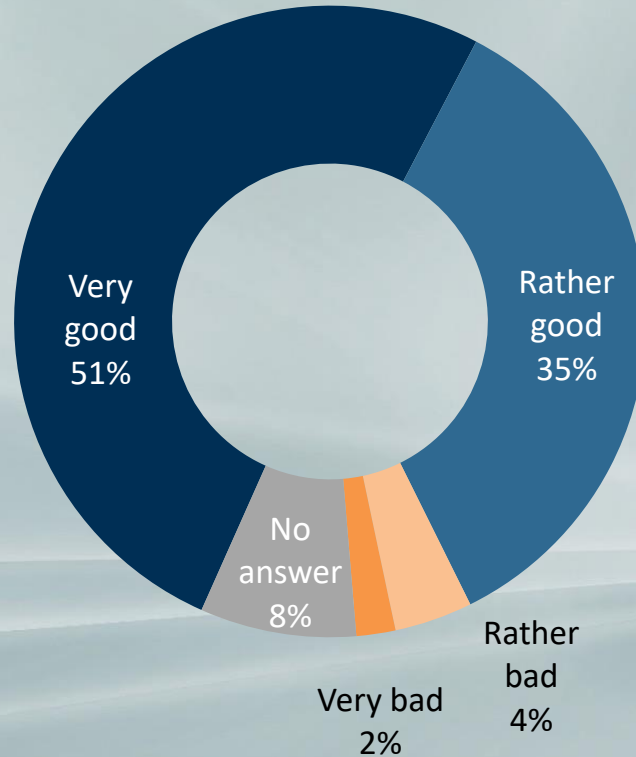
**PLEASE TYPE YOUR QUESTIONS INTO THE CHAT FUNCTION. IF WE DON'T HAVE TIME TO RESPOND NOW WE WILL ANSWER THEM IN THE WEBINAR FOLLOW UP**

# EU CIRCULAR ECONOMY PACKAGE

Have you ever heard about the EU Circular Economy Package?



What do you think about this EU package?

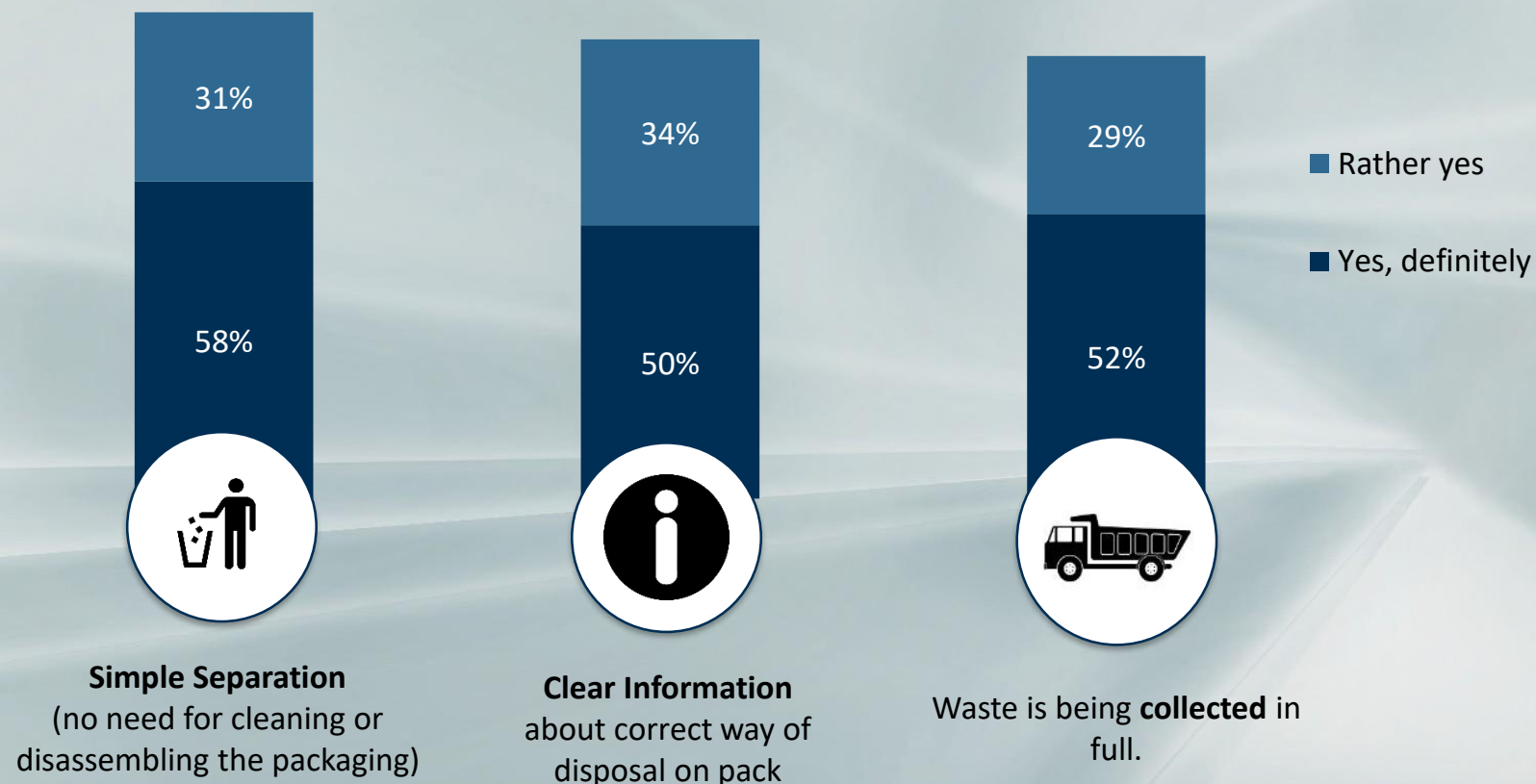


Who should be in charge for implementing this package?

1. Retail Trade	84%
2. Manufacturers	82%
3. Consumer	68%
4. Politics	64%
5. Consumer Associations, NGOs	59%
6. Media	48%
7. Others	3%

# HOW TO OPTIMIZE PACKAGING FOR BETTER WASTE COLLECTION

Would the following steps encourage you to collect and separate your waste even more often?





# WHAT'S NEXT?

## WEBINAR 3: CIRCULAR ECONOMY PROJECTS

**Circular Economy Case Studies for the Retail & Consumer Goods Sector**

**Tuesday February 4 at 2-3pm CET**

In this webinar the **Consumer Goods Forum** will give an overview of the global circular economy initiatives that businesses are involved in and we will also hear from both a **retailer** and **manufacturer** who have completed circular economy projects in their business.





# CONTACT US

## Any questions or suggestions?

Contact our ECR Community Project Manager

[che.mcgann@ecrireland.ie](mailto:che.mcgann@ecrireland.ie)

## Register for next webinars, access slides and webinar recordings

Visit the ECR Community website :

<http://ecr-community.org/blog-post/ecr-circular-economy-webinar-series>

## Find out more from your local ECR organisation on how they are addressing the circular economy

Contact your local ECR organisation

<http://ecr-community.org/ecr-nationals/>