

Pack it in paper | White Paper

Paper strengthens brands



Koehler
PAPER

Expensive? High risk? Unfamiliar?
Lots of marketing managers are reluctant to make the switch to paper packaging.

Nevertheless, the research is clear:
paper creates trust. It signals responsibility. And it changes how people perceive products.

- 01** | What people think about paper
→ Page 3
 - 02** | From the material to the brand message
→ Page 6
 - 03** | The underlying science
→ Page 8
 - 04** | A head start with paper
→ Page 10
 - 05** | By the time the regulations come into force, paper will already have won
→ Page 12
 - 06** | Checklist for brand managers
→ Page 14
 - 07** | Contact
→ Page 15
- List of references and publishing information
→ Page 16

01

What people think about paper

Anyone who asks about packaging materials, soon gets a clear answer: paper is good and plastic is bad – from many points of view. If you are still treating that like a vague gut feeling, you're missing out on a strategically exploitable preference.

Paper is out in front and the gap is widening

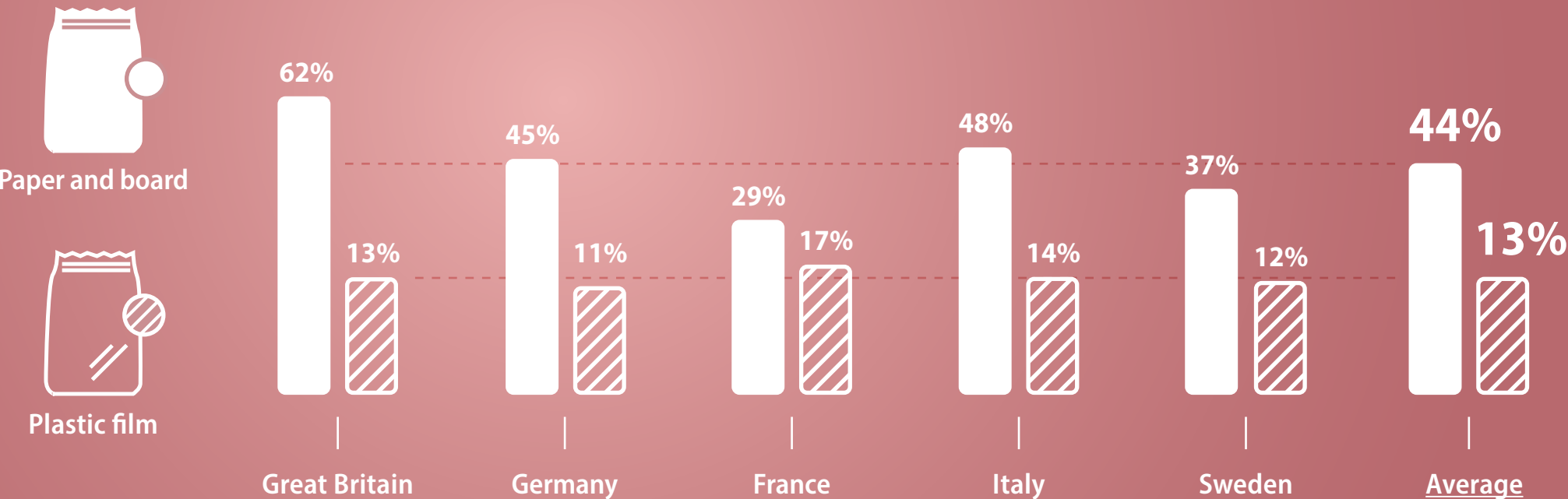
Consumer surveys reveal an unambiguous picture: Die Papierindustrie e.V. surveyed 2,000 people on their use of paper and board in 2025 – and 90 percent of them are pleased when plastic packaging is replaced by paper.

Since 2021, Pro Carton has queried 5,000 people annually in Germany, France, Italy, Spain and Great Britain. In 2026 paper and board were top in the trust ratings for all packaging materials: 87 percent of all respondents believe that paper and board are actually recycled, while for plastics the corresponding figure is only 53 percent.

In 2025, McKinsey confirmed this trend: glass and paper-based packaging are considered the most sustainable materials in five investigated European markets. Nevertheless, there are significant regional differences: In France only 29 percent of people are convinced of the sustainability of paper, while in Great Britain the corresponding figure is 62 percent – but everyone agrees that Europe-wide paper is out in front: in France, at most 17 percent of people think that plastic film represents sustainable packaging.

Perceived sustainability of packaging types

“How sustainable do you think each of the following types of packaging are?”
Percentage of respondents who consider paper to be extremely or very sustainable.



(McKinsey, 2025)



Recyclability is important

This trust has a direct effect on purchasing. For 64 percent of respondents, it is most important that packaging can be recycled. Among the over 60 year-olds, this value increases to 72 percent. Ease of reclosing (39 percent) and ease of opening (35 percent) are much less important (Pro Carton, 2026).



Trust through touch

There is psychology behind this: Packaging speaks to people through feel, color, and form, even before they read the label. Matt surfaces such as paper represent value, and recyclable materials stand for responsibility. These signals build trust in fractions of a second. Paper plays a particularly important role in this signaling system because it is associated with precisely these properties.

90%

are pleased when plastic packaging is replaced by paper

(Die Papierindustrie e.V.)

87%

believe that paper and board are actually recycled

(Pro Carton, 2026)

64%

name recyclability as their most important packaging requirement

(Pro Carton, 2026)

02

From the material to the brand message

Trust in the packaging transfers to the product – and from the product to the brand. For brand managers, this is of direct economic interest because if you gain trust through your packaging, you also create loyalty. If you lose trust, you lose customers.

66 percent of the people surveyed by Pro Carton in 2026, stated that sustainable packaging reinforces their trust in a product. Even in Germany, where consumers are more skeptical, nearly two thirds perceived a positive effect.

Incorrect packaging drives customers away

37 percent of respondents have already changed brands at least once because of the packaging and among 18 to 29 year-olds the figure was as high as 54 percent. And it should not

be forgotten that it is this age group who will determine market share in the coming decades. The most frequent reason for change: the packaging was not recyclable.

Three seconds to make a decision

In more than 90 percent of the purchase decisions for articles associated with a short decision time, the material plays a decisive role (Kortum, 2025). Rastogi and Singh (2025) describe why: People directly associate high quality packaging material with product quality. If someone decides to use recyclable materials, they are seen as responsible, and by doing so they gain the trust of just those target groups that are currently growing the fastest.

A green conscience only goes so far

In 2025 McKinsey dampened down expectations about people's willingness to pay: The number of people who are willing to pay more for sustainability has fallen since 2020. This is not an argument against paper, rather an argument for positioning it as a trust-reinforcing signal that does not require any clarification.

90%

of quickly made
purchase decisions
are also packaging-
dependent
(Kortum, 2025)

66%

of respondents
state that sustain-
able packaging
reinforces their
trust in a product
(Pro Carton, 2026)

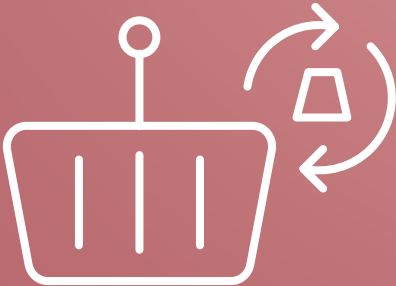
37%

of respondents have
already changed brands
at least once because
of the packaging
(Pro Carton, 2026)



“Companies that use
sustainable packaging
for their products, not
only reduce their environ-
mental footprint, they
also strengthen their
brand image.”

Rastogi and Singh, 2025



03

The underlying science

It is well known that people think paper is more environmentally friendly than plastic. But what is less known is how deeply this effect is embedded in the psyche and the significance of this for the brand.

“Perceived environmental friendliness bias”

In 2023, researchers at universities in the Netherlands and the USA documented an effect in more than 4,000 participants which they referred to as “Perceived Environmental Friendliness Bias”. The finding was surprisingly clear – plastic packaging with an additional paper layer was perceived to be more environmentally friendly than the identical packaging without this layer, although it contained more materials. More packaging materials – but it feels more environmentally friendly. Purely because paper is visible.

An effect that goes beyond reason

The first mechanism is a deep-rooted conviction, “paper is good, plastic is bad”. This attitude does not originate in a rational analysis of environmental footprints, rather through repeated experience and cultural signals. People are much happier handling paper than they are handling plastic. It is rated as natural because it comes from trees and it is intuitively rated as a less harmful material. The equation is solved at an emotional rather than a logical level.

The second mechanism is proportional thinking: the larger the visible paper fraction relative to the plastic fraction, the more the packaging is perceived to be environmentally friendly. The raw quantity of visible paper influences the sustainability assessment, quite irrespective of whether the paper is actually necessary for the function or not. Both mechanisms take place in the subconscious, not as a result of rational consideration.

What the hands feel, is believed by the head

The design reinforces these psychological mechanisms. Feel, color and the materials used trigger emotional reactions,

“The ‘Perceived environmental friendliness bias’ can even cause people to think the packaged food tastes better, to prefer the brand and to use the product more frequently”.

Sokolova, Krishna and Döring, 2023



even before the mind starts to work. Matt surfaces and paper textures stand for quality and natural properties. Green colors reinforce the impression of sustainability, while recyclable materials signal ecological responsibility even before anyone reads a word. There is no need for any clarification and no need for a certificate – paper as a material speaks for itself, simultaneously via the eyes, hands and feel.

The significance for brands

For brands that switch to paper, the result is a favorable starting point: The “perceived environmental friendliness bias” supports this starting point. The study also shows that this has consequences for the consumer’s purchasing decision – people pay measurably more for products in paper packaging and increasingly select them. Therefore, “perceived environmental friendliness bias” is not only a perception phenomenon, but it is also a lever for willingness to pay and in purchasing decisions. This makes it into one of the strongest arguments that packaging research has delivered in the last few years for a switch to paper.

04

A head start with paper

In the study “Zukunft der Verpackung 2030 (The Future of Packaging 2030)” the research team of the Duale Hochschule Baden-Württemberg (DHBW) asked 21 experts from brand management, packaging development and trade about the “paperization” (the targeted switch from plastic packaging to paper solutions) trend. The picture is plain, but clear: Paperization is gaining momentum. The study describes the change as an interaction between regulatory pressure, changed consumer behavior and technological advances – not just short-term hype, rather a structural change.



New EU rules demand action

From 2030 all packaging coming to the market in the EU must be proven to be recyclable in line with the Packaging and Packaging Waste Regulation (PPWR). Anybody who has not changed over by then will be subject to time and cost pressures, or will even risk a ban on sales.

This is a favorable starting point for paper: in general, paper packaging fulfils the requirements without additional proof. Anyone switching over to flexible paper packaging solutions now, is getting rid of the compliance problem in advance.



Where you can start straightaway

Surveyed companies are starting from different positions. With dry, uncooled products, the conversion to paper is technically already largely possible. With greasy or moisture containing contents, the conversion is more complex. It makes sense to start where the obstacles are not too great and then to advance in steps. Simultaneously, the study makes clear the largest obstacle, namely that many companies are waiting until all regulatory details have been clarified and in so doing are losing time, time that is needed for an ordered changeover.

He who hesitates is lost

A revealing insight in itself: more than 50 companies were asked but only 21 interviews were completed. For large parts of the industry, the topic is not yet on the agenda. But if you change that now, you are stealing a march that straggling competitors will not be able to make up, neither from a regulatory point of view nor in terms of brand trust.

“Packaging is not just a means of product protection, it is also a strategic means of communication – especially in retail. Sustainable packaging can become a clear differentiating factor”.

Kortum, 2025



05

By the time the regulations come into force, paper will already have won

The regulations governing sustainability communications are becoming stricter. The aim of the “Empowering Consumers Directive”, EmpCo, is to prevent greenwashing, therefore, starting from autumn 2026, environmental statements must be clear, transparent and provable. In parallel with this, from 2030, the PPWR will demand recyclable packaging. This double tightening effect will be particularly difficult for brands that have relied on hard-to-prove climate statements. In contrast paper is well set up.

Paper can deliver what other products first have to prove

The fact that paper can be recycled up to 25 times, has been technically proven and has for decades been part of an established practice in the European wastepaper system – moreover it is intuitively understandable for the public at large. FSC and PEFC certification underpin the sustainability – wood is a renewable raw material. Statements about circularity stand on solid ground – completely without any need for complex and expensive individual certificates.

Critical lack of evidence for plastic

The situation is much more difficult for plastic packaging with recycling claims. Actual recycling ratios, ease of home-sorting and the available infrastructure all vary significantly – dependent on country, type of material and the local waste disposal reality. In the 2026 Pro Carton Study, flexible plastics had the lowest level of trust of only 53 percent in respect of their recyclability – the lowest value of all the materials examined. Green claims for these materials will in the future be more difficult to make and prove.

“Recyclability comes first: Respondents in all countries named it the most important decision-making factor when deciding in favor of sustainable packaging”.

McKinsey, 2025



It must be reusable

McKinsey confirmed: Recyclability is the most important packaging sustainability characteristic – more important than refill capability, percentage of recycled material, compostability and bio-based origin. If you select paper, you are fulfilling this priority precisely using a material that customers already trust, before a brand has even to mention it.



Credibility that can be digitally enhanced

Smart packaging – QR codes, digital information about origin and recycling strengthen the trust of environmentally conscious target groups (Rastogi and Singh, 2025). In this respect, paper has the best starting position because it is a material whose sustainability profile can be transparently presented and because it can be further digitally developed. Those using paper are not only communicating correctly but also convincingly.

06

Checklist for brand managers



360° Koehler Service

We clear the way for your sustainable packaging solution and advise from start to finish – from initial analysis through to market readiness. Get in touch with us and we'll be happy to advise you!



Do all managers know the consumer data?

Often the subject has still to reach the decision-making level, yet the numbers don't lie: 87 percent trust paper packaging, 66 percent feel a stronger affinity to brands using paper and 37 percent switch brands away from brands using non-recyclable packaging. Make sure everybody inside the company is aware of these facts!



Is paper part of your PPWR planning for 2030?

From 2030, the PPWR requires proof of recyclability. Switch over to paper now, ensure your compliance at an early stage and gain yourself some time in which you can communicate the changeover.



Which product categories are already suitable?

Start with the obvious areas: dry and greasy foods, confectionary, tea and drugstore products.



Is the packaging material clearly recognizable as paper?

"Perceived environmental friendliness bias" is only effective when consumers perceive the paper both visually and by feel. Ensure there are unambiguous signals.



Are all communications channels being used?

Paper's trust bonus is displayed most clearly when you actively exploit it: On the packaging, at the point of sale and in PR. Switch over and then talk about it, that's how you maximize the effect.

07

Contact

**Do you want to find out how
paper packaging can strengthen
your brand?**

**Then get in touch with us.
Together we can develop
the solutions that will match
your product.**

Alexander Rauer

Head of Business Development
Functional Barrier Paper

Phone **+49 7802 81-5775**

E-mail **alexander.rauer@koehlerpaper.com**



List of references

- [1] Paper Meets Plastic: The Perceived Environmental Friendliness of Product Packaging. Sokolova, Krishna and Döring, 2023 → [LINK](#)
- [2] Zukunft der Verpackung 2030 – eine empirische Analyse von Entscheidern zum Trend Paperisation (The Future of Packaging 2030 – an empirical analysis of decision-makers regarding the trend of paperization). Kortum, 2025 → [LINK](#)
- [3] The Power of Packaging – What Makes European Consumers Trust, Stay, or Switch? Pro Carton, 2026 → [LINK](#)
- [4] How Packaging Influences Customer Perception of a Product. Rastogi and Singh, 2025 → [LINK](#)
- [5] Sustainability in packaging: What do European consumers value in 2025? McKinsey, 2025 → [LINK](#)
- [6] Die Papierindustrie, 2025 → [LINK](#)

Publishing information

Koehler Paper SE
Hauptstraße 2
77704 Oberkirch
Germany
Phone +49 7802 81-0
info@koehlerpaper.com
www.koehlerpaper.com

© Koehler Paper SE | June 15, 2026



Koehler
PAPER



Visit our
website
for more
information