



Trend Report

## The Refillable Difference:

Trends for  
Sustainable Packaging



## Background - How Did We Get Here?

Once a niche concept, refillable packaging now has major brand owners working to redesign their business models and packaging in a more sustainable way.

The market is gaining attention in our eco-conscious climate because it is designed to cut down on the volume of packaging—and waste—through a closed-looped model.

There are four main approaches to refillable packaging:

- Refilling existing packaging at home
- Refilling existing packaging in store
- Returning packaging from home
- Returning packaging in store







## How Is Consumer Behavior Changing?

More consumers are growing concerned about sustainability and are pushing for products with a positive environmental impact. This is leading to an increased demand for refillable packaging.

Major brands are listening to these buyers by providing more transparency about the environmental impact of their products. Some are also writing sustainability pledges into corporate plans.

Refillable packaging enables companies to meet these sustainability goals in a public way that connects the consumer to the brand long-term.





## What Is Driving This Trend?

During the COVID-19 pandemic, the e-Commerce sector experienced exponential demand for refillable packaging. Customers are more inclined now than ever before to use refillable subscription services delivered straight to their homes.

Asia-Pacific will drive the market with its growing population and increasing disposable income. Refills are already in demand, with 71% of APAC and UK consumers looking for refillable versions of their favorite cosmetics, cleaning products and more.

Global government regulations surrounding the reduction of single-use plastics will also support the growth of the refillable packaging market.





## How Are Companies Embracing This Trend?

Many companies are already rolling out refillable packaging and refill trials worldwide. In the long term, this will help in meeting sustainability goals, cutting costs and defining strong brand equity.

Unilever is aiming to ensure its plastic packaging is reusable, recyclable or compostable by 2025. The company is experimenting with refillable packaging in a multitude of ways including refill trials of seven brands in the U.K.

Coca-Cola recently launched a pilot for refillable drinks at a Stockholm convenience store. It partnered with Glacial, a company that provides insulated reusable beverage containers.







## How Are Companies Embracing This Trend?

Colgate-Palmolive is now offering SoftSoap® Foaming Hand Soap, a trademark of IES Enterprises, Inc., in tablet form paired with a refillable aluminum bottle. The tablets are still wrapped in plastic, but the system uses 71% less plastic than traditional foaming plastic soap bottles.

Refillable packaging is also a major focus for L’Oreal’s development team. Some examples of recent projects include Kiehl’s in-store “refillary” and Biotherm’s refillable skincare line.

There are a number of benefits to refillable packaging, but there is still much to be done before the concept can become mainstream. As Richard Slater, the chief research and development officer at Unilever said, “there isn’t a one-size-fits-all solution. To deliver a range of options that work, we continue to adopt a ‘test, learn and refine’ mentality.”





## Wrapping Up

As sustainability goals broaden, consumer goods brands are looking to creative ways to differentiate themselves in the market.

Brands that offer packaging designed to be refilled with new product aim to address single-use plastics.

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# Make the Shift to Refillable Packaging Using Innovative Materials and Inspired Design

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