



Trend article

How do consumer attitudes toward packaging sustainability impact the RTD tea category?



As a producer of ready-to-drink tea operating in a highly competitive market with growing environmental awareness, you may be questioning how consumers' views on sustainability are changing, and what this means for your brand, particularly in relation to packaging. To investigate this, Tetra Pak carried out a global consumer study, Sustainable Packaging Consumer Research, which was published in October 2025.

The research was based on online interviews with 12,500+ consumers across 25 countries. Its results were then validated against earlier studies which focused specifically on ready-to-drink tea sustainability trends.¹

¹ Innova Database, Innova Packaging Survey 2024

Consumers' concerns – the big picture

Our 2025 Sustainable Packaging Consumer Research indicates a shift towards more mindful consumption.

Three in four consumers (75%) express concern about environmental issues, such as pollution, harm to nature, plastic litter and climate change and these concerns increasingly influence their purchasing behaviour. Respondents show a growing interest in packaging that reduces waste, supports circularity and lowers environmental impact.

When thinking about “sustainability” within the RTD tea category, consumers place the greatest importance on the following four factors:*

- 01 Sustainable packaging (as understood by consumers) >
- 02 Packaging recyclability and on-pack information >
- 03 Responsible sourcing of packaging materials and ingredients >
- 04 Ethical production >

Below, we align these priorities with what our portfolio can enable, applying consumer perceptions, market-dependent facts and third-party frameworks where relevant.

01. Sustainable packaging - from “nice to have” to widely expected by consumers

Our global research indicates that 30% of consumers are actively trying to reduce food and beverage packaging use in their households.

What’s more, consumers now expect institutions, brands and packaging companies to take action and find improvements or solutions to environmental issues, according to our 2025 survey.

*1 i.e. packaging that is defined as “recyclable”, “made of recycled materials” and “made using materials from renewable resources” among its attributes.
Source: Sustainable Packaging Consumer Research, 2025.*

47%

of respondents said they are more likely to consider a brand when packaged in a solution they perceive as “sustainable”¹

Focusing specifically on RTD tea packaging, one study asked consumers to rank their most important purchase drivers. “Environmentally sound” came top of the list and was mentioned by 40% of the over 6000 respondents.¹

Reported behaviours include buying more products that mention recycled materials (28%), choosing products specifically because they perceive them as sustainable² (25%), and favouring reduced packaging overall (24%).³

How carton is perceived

Against this backdrop, carton packaging stands out. In our research, 43% of respondents

perceive cartons more favourably than other packaging solutions such as glass (34%) or plastic (16% - 28% depending on format), according to their definition of “sustainable packaging”.²

These consumer perceptions reflect key carton credentials, including a high share of renewable materials (on average more than 70% of a beverage carton is made of paperboard sourced from FSCTM-certified forests and other controlled sources - a renewable material that can be replenished when sourced responsibly⁴) and a lower carbon footprint compared to other packaging options.⁵

¹ RTD Tea, global consumers U&A 2025

² i.e. packaging that is defined as “recyclable”, “made of recycled materials” and “made using materials from renewable resources”

³ Sustainable Packaging Consumer Research, 2025

⁴ The remaining 30% of carton content is, on average, composed of thin layers of plastic (25%) and aluminium (5%)

⁵ ifeu 2020, “Comparative Life Cycle Assessment of Tetra Pak® carton packages and alternative packaging systems for beverages and liquid food on the European market”



43%

of consumers perceive cartons more favourably than other packaging solutions²



02. Recyclability and recycling information

Recyclability ranks highest among the attributes consumers associate with “sustainable packaging”¹. Four in ten consumers (41%) define sustainable beverage packaging as “recyclable”.²

This finding is reinforced by our RTD tea trend research, where choosing recyclable packaging emerges as the number one action that consumers say they take to reduce their environmental impact.

41%
of consumers define sustainable beverage packaging first and foremost as “recyclable.”²

¹ i.e. packaging that is defined as “recyclable”, “made of recycled materials” and “made using materials from renewable resources”
² Innova Database, Innova Packaging Survey 2024

RTD tea producers are taking note and responding. In 2024, 77% of new RTD tea launches carried package recyclability claims, which is up 8.3% on the previous year. This trend is especially strong in the Middle East and Africa, where package recyclability claims on RTD tea launches grew year on year by 38% from 2022 to 2024.¹

As RTD tea brands seek to meet consumer expectations and regulatory demands, packaging solutions that are designed for recyclability and supported by established recycling streams offer a clear strategic advantage. Tetra Pak cartons can be recycled wherever collection, sorting and recycling infrastructure is available at scale (this varies by market), and valuable materials can be kept in circulation and transformed into other products.

Recycling information and infrastructure

Recycling is a common daily habit, with 45% of consumers reporting that they regularly separate and set aside waste for recycling.²

At the same time, curiosity about what happens to packaging after disposal is increasing. Nearly 70% of consumers say they want a better understanding of how packaging is recycled or reused.²

Clear on-pack information

The same research also indicates that clear on-pack information is important. Over a third of consumers regularly check recycling instructions and environmental logos, and recyclability-related terms are not only the most recognised, but also considered the most relevant of all environmental claims.

Claims on RTD tea products

When buying RTD tea products, consumers pay attention to sustainability claims, and especially those related to recyclability. When asked which claims most strongly influenced their food and beverage purchasing decisions, 45% of consumers mentioned “recyclable materials”.²




45%

of consumers routinely sort and set aside waste for recycling³

of consumers say that “recyclable materials” is the packaging sustainability claim that most impacts their choice of RTD tea products²

¹ Innova Database, Innova Packaging Survey 2024

² Sustainable Packaging Consumer Research, 2025

Improving recycling rates

To strengthen collection and recycling infrastructure and further increase collection and recycling rates of beverage cartons, we continuously collaborate with different actors in the global recycling value chain, including customers, suppliers, policymakers, governments and academic institutions.

Another influential claim is “made from recycled materials”, with 28% of consumers globally saying they purchased more items citing this claim last year compared to the year before¹

In the RTD tea category, nearly a third of consumers (32%) cite, “made using recycled content” as an important purchase driver, while a similar share (33%) consider, “made with renewable materials”

to be important when choosing a packaged product.² sustainable packaging.

Reducing overall material use matters too. Around a quarter of consumers say they actively look for products with less packaging, and minimal material use is increasingly part of how they define “sustainable packaging”³

1/4

of consumers actively look for products with less packaging¹

We are addressing these expectations by introducing certified recycled polymers into carton packages and by continuously pursuing package weight reduction and efficient design, while ensuring food safety.⁴



¹ Sustainable Packaging Consumer Research, 2025

² RTD Tea, global consumers U&A 2025

³ i.e. packaging that is defined as “recyclable”, “made of recycled materials” and “made using materials from renewable resources” among its attributes. Source: Sustainable Packaging Consumer Research, 2025

⁴ Tetra Pak Packaging Materials

03. Responsible sourcing across the value chain

Our 2025 research shows that the responsible sourcing - of both carton packaging and raw ingredients - shapes consumer trust.

54%

of RTD tea products packaged in cartons carry responsible sourcing claims, over 90% of which reference FSC™ label.¹

¹ Innova Database, Innova Packaging Survey 2024

Raw ingredients lie outside our sphere of influence, but when it comes to packaging materials, we have an important role to play. We focus on responsibly sourced renewable content such as paperboard from FSC™-certified forests and other controlled sources, and Bonsucro certified plant-based polymers.

Moreover, we continuously innovate and develop packaging with a higher renewable content. In 2024 for example, the share of plant-based polymers reached 8.2% of the total amount of polymers we purchased.¹



¹ Based on climate accounting internal calculations (volume x emission factor) considering 56.9 kilo tonnes of plant-based plastic purchased in 2024

04. Ethical production

We see that consumers around the world are placing increasing value on brands that demonstrate strong ethical practices, including fair labour conditions and respect for human rights.¹

For this reason, some RTD tea producers are broadening their focus beyond packaging to highlight ethical production across their supply chains. This includes the use of recognised certifications such as Fairtrade, which supports fair labour practices and positive community impact.

¹ Innova Database, Innova Packaging Survey 2024





Reflecting this shift, RTD tea launches featuring human welfare-related claims grew by 76% year-on-year from 2023 to 2024, with Western Europe leading the way at 102% CAGR.¹

Consumer attitudes reinforce this trend. 45% say supporting social and ethical causes are an important consideration when buying food and beverages, and 22% want to see more brands actively respecting human rights.²

76%

RTD tea launches featuring human welfare-related claims grew by 76% year-on-year from 2023-2024¹

¹ Innova Database, Innova Packaging Survey 2024

² Innova Trend Survey 2025, Innova Life & Attitudes Survey 2024

Looking ahead – what consumers want next?

Consumers are clear about the carton packaging innovations they would like to see in the future. Among the main improvements they mention are: cartons made only from renewable materials (28%), replacing all plastic components with plant-based plastics (26%), incorporating recycled materials (26%), and developing a paper-based barrier for ambient products (23%)¹.

We are actively innovating in all these areas, expanding our use of renewable and responsibly sourced materials, increasing the use of recycled content, and advancing paper-based barrier technology development. Through continued investment, life-cycle assessments and collaboration across the value chain, we are working to deliver carton packaging solutions that will help you, as an RTD tea producer, meet your consumers' evolving expectations.

¹ Sustainable Packaging Consumer Research, 2025

Consumers priorities for future carton packaging innovations



Keen to leverage the carton advantage?

Are you ready to turn consumer expectations into a competitive advantage? Get in contact to learn more about how our carton packaging solutions can help you meet consumers' evolving RTD tea demands, while strengthening your brand and preparing your portfolio to meet upcoming regulatory requirements.

Get in touch with us today!



