

Innovation at the centre of retail and packaging demands

How AI tools are reshaping consumer behaviour and why their packaging demands are greater than ever

A survey of 6,000 consumers in France, Germany, Poland, Sweden, Türkiye and the UK

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In partnership with

RetailX



Cover artwork produced using generative AI

Foreword



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The world of eCommerce continues to evolve at speed, with online retailers operating in a market defined by technological acceleration, shifting consumer expectations and operational complexity.

Innovation, therefore, continues to define the future of eCommerce. In this year's edition of our annual Mondi Group eCommerce trend report, we explore how artificial intelligence, automation and smarter packaging solutions are impacting fulfilment, operational performance, and the customer experience.

Protection and sustainability: a new standard

This year's findings confirm that product protection remains non-negotiable, with 98% of shoppers identifying it as their top priority. At the same time, sustainability expectations continue to rise, now reaching 86%.

Consumers no longer accept a compromise between performance and environmental responsibility—they expect both. Two-thirds also confirm that sustainable packaging enhances the unboxing experience and encourages repeat purchase.

This signals a fundamental shift. Sustainable, protective and fit-for-purpose packaging is no longer a differentiator. Instead, it is becoming the new baseline.

Understanding behaviour to unlock progress

Generational differences remain visible. Boomers prioritise practicality and eco-conscious packaging, while Generation Z places stronger emphasis on aesthetics and innovation. Yet one in five Generation Z consumers knowingly disposes of recyclable packaging in the general waste stream.

This highlights a critical opportunity: packaging design must not only protect and perform, but also clearly communicate how it should be recycled. Simplicity, clarity and intuitive design could help close the gap between the intention to recycle and actual behaviour.

Packaging as a driver of performance

Retailers face continued margin pressure, regulatory change and rising customer expectations. In this environment, packaging must be evaluated not only on unit cost but on total system impact—including transport efficiency, automation compatibility, damage reduction and operational productivity. Packaging has evolved from a functional requirement into a strategic performance driver. We work closely with online retailers to understand their operational pain points and long-term ambitions as we believe packaging should actively contribute to efficiency, sustainability and brand strength—not simply support them.

Shaping the future together

The opportunity ahead is significant. Retailers that approach packaging strategically—aligning protection, design and sustainability—will be better positioned to navigate complexity and create long-term value.

I truly hope you enjoy this read and gain valuable insights!

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Key findings

Changing shopping habits, greater adoption and demand for AI tools and stronger sentiment than ever around the role of unboxing, the importance of sustainability and the future of packaging are the key findings of this year's Mondy Group eCommerce trend report.

For 2026, the annual consumer sentiment survey by RetailX examines the opinions of 6,000 online shoppers across France, Germany, Poland, Sweden, Türkiye and, for the first time this year, the UK. The survey was carried out online 5-7 January 2026.

The results show eCommerce packaging's role as a powerful driver of brand perception, sustainability expectations and customer loyalty. We also learn the surprising truth about the consumers who knowingly dispose of recyclable packaging in their general waste.

AI shopping tools adoption: Trust and transparency are critical

The adoption of AI tools is accelerating as consumers use them to reduce product overwhelm and simplify shopping, but control and credibility remain essential.

- Around six in ten use AI tools for brand, product and price research when shopping online.
- More than half will let AI act on their behalf to purchase, so long as they can set the parameters.
- Nearly seven in ten prefer choosing their own AI tool to using a retailer-supplied one.
- Four in ten want AI to complete the purchase for them without having to check all the details.
- Nearly eight in ten (77%) will still verify the information provided by AI recommendations before buying.

Proven sales drivers: Protection, experience & sustainability

While AI transforms digital journeys, physical packaging continues to influence repeat buying. More than just protection—although this remains the primary demand—the right packaging can win retailers repeat sales rather than send customers packing and lose future revenue.

- Demand for protective (98%), recyclable (88%) and sustainable (86%) packaging continues to rise.
- More than half (53%) of consumers will pay extra for packaging that best suits their needs.
- Two-thirds (67%) say packaging contributes to an unboxing experience that encourages repeat purchase.
- 72% will avoid shopping with retailers again who use oversized packaging.
- Unboxing remains a powerful loyalty lever, most crucial for Generation Z, where 79% say it influences them to buy again.
- Nearly a quarter (23%) of Generation Z say personalised messages on packaging helps promote a positive unboxing experience.

Sustainability: Credibility remains vital as expectations rise

Consumers notice improvements such as right-sized packaging and increased recycled materials, but scepticism remains.

- One in five (20%) do not trust that packaging is becoming more sustainable.
- Four in ten notice the top three sustainability efforts of right-sized packaging (41%), more recycled materials (39%) and less packaging overall (37%).
- More than a quarter (28%) say the use of plastic packaging puts them off buying.
- Eight in ten (80%) say retailers should do more to reduce packaging waste.
- Half (51%) want easier-to-recycle packaging.

Sustainability and the generational divide: The uncomfortable truth

Recycling behaviour varies. Boomers are more likely to care about sustainability, while younger consumers are more likely to bin packaging they know is recyclable.

- Six in ten (59%) of Boomers put their packaging in a recycling bin, compared to 42% of Generation Z.
- Generation Z consumers are five times more likely (16% vs 3%) than Boomers to dispose of packaging in general waste.
- One in five Generation Z (19%) and Millennials (18%) know packaging is recyclable, but put it in with regular waste anyway, nearly four times the number of Boomers (5%).
- One in five (21%) Generation Z consumers blame a lack of time for not sorting packaging and putting it into the recycling stream, seven times the number of Boomers (3%).

AI is changing how we buy online. Packaging determines whether we come back.



60% use AI in shopping

Six in ten (60%) of shoppers use AI tools to summarise product reviews and customer feedback.



77% still verify AI recommendations

Nearly eight in ten (77%) of shoppers will still verify the information when AI recommends products to them, whether that's by looking at information on the retailer's website or checking reviews.



72% avoid oversized packaging

Customers most dislike overpackaging, with 72% avoiding shopping with a retailer again if oversized packaging is used.



67% say packaging drives repeat purchase

Two-thirds (67%) of consumers say packaging features, such as shape, material or personalisation, play an important role in creating an unboxing experience that encourages them to buy again (vs 59% in 2025).

Generational differences



Generation Z nearly twice

more likely than Boomers to use AI to shop.



Boomers most influenced

by the top three unboxing factors of appropriately sized packaging, ease of opening and sustainable external packaging.



Generation Z three times

more likely to be influenced by personalisation than Boomers.




Generation Z four times

more likely than Boomers to put packaging they know is recyclable in general waste.



Generation Z seven times

more likely than Boomers to blame a lack of time for not sorting packaging.

A man with dark hair and a beard, wearing a red zip-up jacket and blue jeans, is sitting on a grey sofa. He is smiling and looking down at a brown paper bag he is holding. He is using his right hand to tear the top of the bag. The background shows a living room with a white wall, a window with a small potted plant, and a larger potted plant in a wicker basket. There are two pillows on the sofa: one white with a black geometric pattern and one dark green. A blue brushstroke graphic is overlaid on the left side of the image, containing the text.

How AI is transforming consumer shopping behaviour

Six in ten consumers use AI across the three product research stages

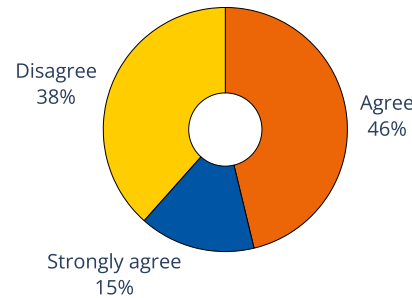
AI tools are helping shoppers discover, research and buy products more easily than ever before. They can provide everything from tailored product recommendations and conversational search to virtual assistants that can help customers throughout the entire shopping process.

This year, for the first time, the survey asked consumers across the six countries about their use of AI tools and platforms when shopping online. These included OpenAI's ChatGPT, Google's Gemini and Perplexity and retailer tools such as Amazon's AI-powered conversational shopping assistant Rufus.^[1]

At Amazon, rapid innovation of AI within the shopping experience has been a key focus since the launch of Rufus in 2024. The company says, with 50 technical upgrades since its launch, the assistant is now 'smarter, more capable and more conversational and helpful'.

According to Amazon, 250 million customers used Rufus in 2025, with monthly average users up 149% and interactions up 210% over the past year. It claims that customers who use it while shopping are more than 60% more likely to make a purchase during that shopping trip.

Shoppers who use AI to identify suitable product categories or brands

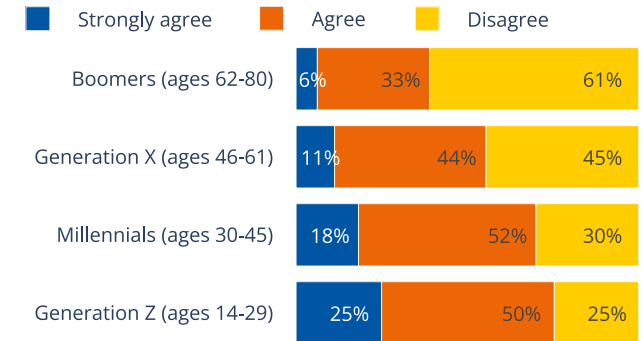


Percentages may not total 100 due to rounding. Question: 'I use AI tools to help me identify which product categories or brands might meet my needs when I am not sure where to start'

Source: RetailX

RetailX 2026
RXS230WP-CX-24-v5

Shoppers who use AI to identify suitable product categories or brands, by generation

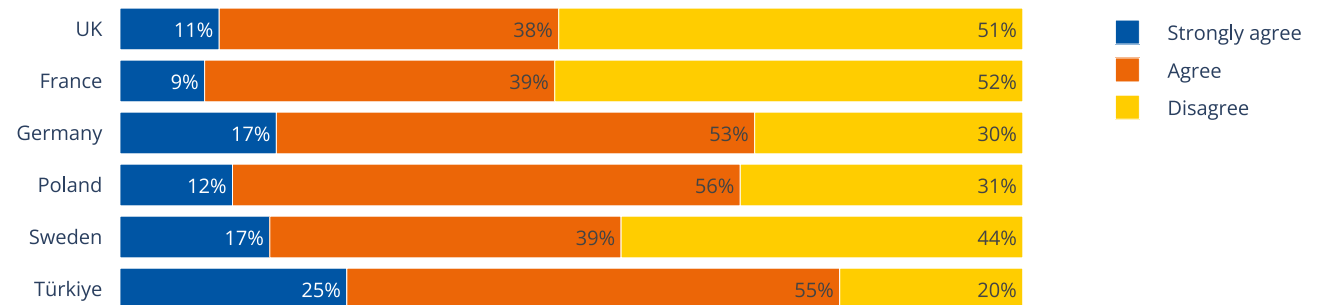


Percentages may not total 100 due to rounding. Question: 'I use AI tools to help me identify which product categories or brands might meet my needs when I am not sure where to start'

Source: RetailX

RetailX 2026
RXS230WP-CX-10-v2

Shoppers who use AI to identify suitable product categories or brands, by country



Percentages may not total 100 due to rounding. Question: 'I use AI tools to help me identify which product categories or brands might meet my needs when I am not sure where to start'

Source: RetailX

RetailX 2026
RXS230WP-CX-10-v3

The survey sought to gauge how consumers use AI to find the ideal seller, product, or price, or to allow AI to carry out shopping tasks, such as ordering or adding to basket, on their behalf.

The results show that such AI tools play an important role in the research phase at the start of the customer journey, helping shoppers to navigate product and retailer overwhelm.

AI for product category and retail identification

Six in ten consumers (61%) say that they use AI tools to help identify which product categories or brands might meet their needs when they're not sure where to start.

This is most apparent for younger consumers. Three-quarters (75%) of Generation Z and 70% of Millennials use such tools, compared to 39% of Boomers.

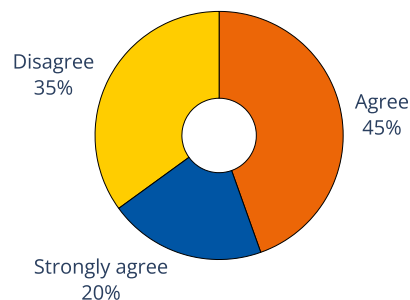
At 80%, Turkish consumers are the most likely to use AI tools to help narrow initial product and brand search, followed by German consumers at 70% and Polish consumers at 68%. Just under half of UK (49%) and French (48%) consumers agree they use AI in this initial category and brand search.

AI for price and product comparison

Once they know what to look for and where, almost two-thirds (65%) of shoppers use AI tools to compare product features and prices across different retailers to find the best product and price fit for their needs.

Three-quarters (75%) of Generation Z and 71% of Millennials use AI to compare products and prices, compared to 47% of Boomers.

Shoppers who use AI to compare products and prices

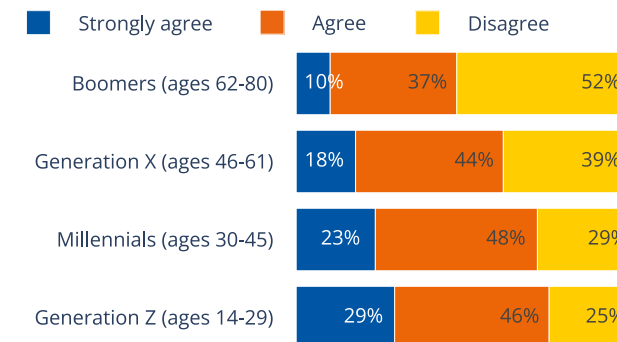


Percentages may not total 100 due to rounding. Question: 'I use AI tools to compare product features and prices across different retailers to understand the differences between options.'

Source: RetailX

RetailX 2026
RXS230WP-CX-22-v7

Shoppers who use AI to compare products and prices, by generation

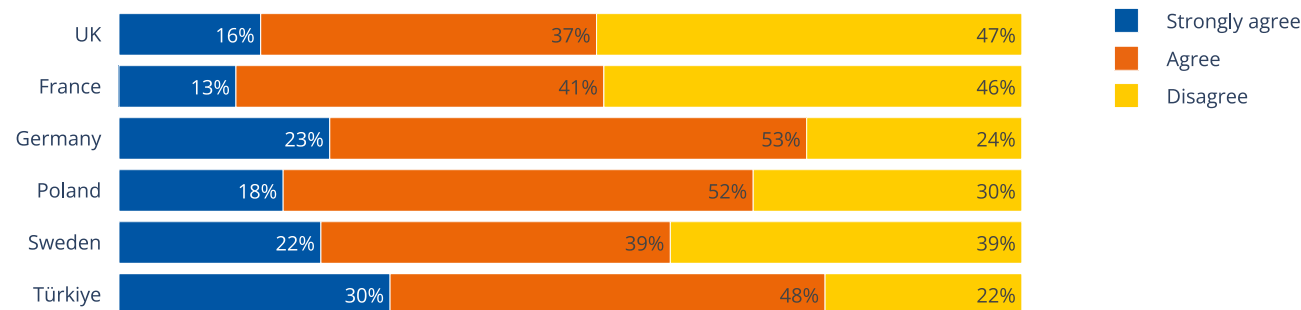


Percentages may not total 100 due to rounding. Question: 'I use AI tools to compare product features and prices across different retailers to understand the differences between options.'

Source: RetailX

RetailX 2026
RXS230WP-CX-12-v3

Shoppers who use AI to compare products and prices, by country



Percentages may not total 100 due to rounding. Question: 'I use AI tools to compare product features and prices across different retailers to understand the differences between options.'

Source: RetailX

RetailX 2026
RXS230WP-CX-11-v3

As with the initial retailer and category search, Turkish consumers are the most likely to use AI in this next step, with 78% agreeing they do so and 76% of Germans. UK and French consumers are again the least likely to use AI in this step, at 53% and 54% respectively.

AI to summarise product reviews

In the final stage of the decision-making process, shoppers often read reviews and customer feedback to determine which product is right for them and whether it's as good as it promises to be.

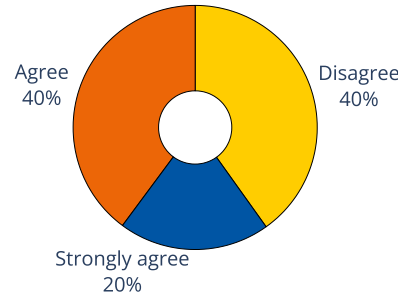
This can be a lengthy process, but AI can shorten it. Six in ten (60%) of shoppers use AI tools to summarise product reviews and customer feedback.

Once again, younger generations are most likely to use these tools, with 71% of Generation Z, compared to 40% of Boomers.

By country, Turkish (80%) and German (69%) consumers are most likely to use AI tools to summarise product reviews, compared to less than half (47%) of both UK and French consumers.

[1] <https://www.aboutamazon.com/news/retail/amazon-rufus-ai-assistant-personalized-shopping-features>

Shoppers who use AI to summarise product reviews

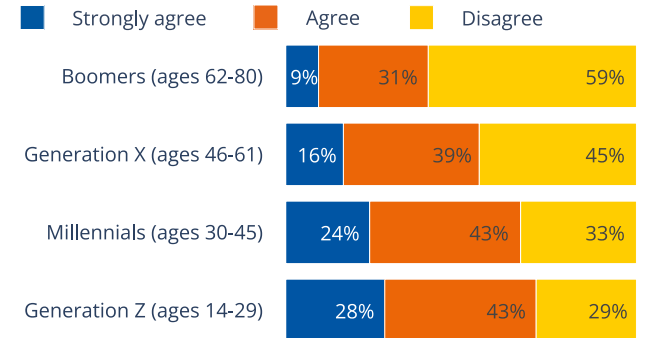


Percentages may not total 100 due to rounding. Question: 'I ask AI tools to summarise product reviews and customer feedback so that I do not have to read lots of individual reviews.'

Source: RetailX

RetailX 2026
RXS230WP-CX-23-v6

Shoppers who use AI to summarise product reviews, by generation

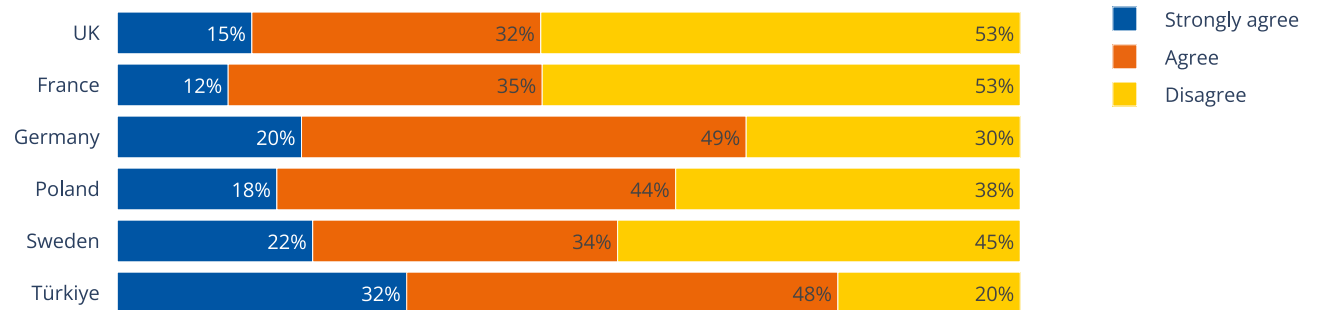


Percentages may not total 100 due to rounding. Question: 'I ask AI tools to summarise product reviews and customer feedback so that I do not have to read lots of individual reviews.'

Source: RetailX

RetailX 2026
RXS230WP-CX-13-v2

Shoppers who use AI to summarise product reviews, by country



Percentages may not total 100 due to rounding. Question: 'I ask AI tools to summarise product reviews and customer feedback so that I do not have to read lots of individual reviews.'

Source: RetailX

RetailX 2026
RXS230WP-CX-12-v4

More than half of consumers happy for AI tools to make buying decisions for them

AI's role in product decision-making is already significant. But its potential isn't just confined to the product research stage. Instead, customers say they are willing to let it take on more of the buying decision process, albeit within parameters set by them.

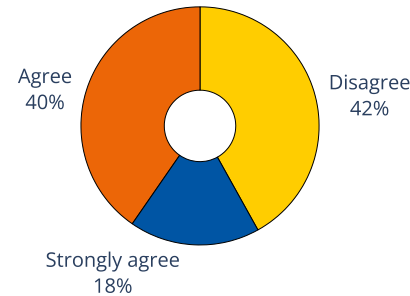
Retailers are realising the huge potential. One of the most recent examples of this was the January 2026 announcement that Australia's Woolworths^[1] has partnered with Google to use the Gemini platform to incorporate agentic AI into its chatbot.

The development means that Woolworths' chatbot, named Olive, will move from just answering questions and directing shoppers to information to adding items to a customer's online shopping basket for them to approve and pay. It means Woolworths becomes the first supermarket in Australia to allow AI-powered agents to shop on its customers' behalf.

Meanwhile, in February, US giant Target^[2] announced the launch of its ChatGPT-powered shopping app, which will build baskets for customers based on natural language conversation.

Amazon's Rufus will also automatically add items to customers' online baskets, allowing them to review before purchase.

Shoppers willing to let AI choose retailer and delivery options

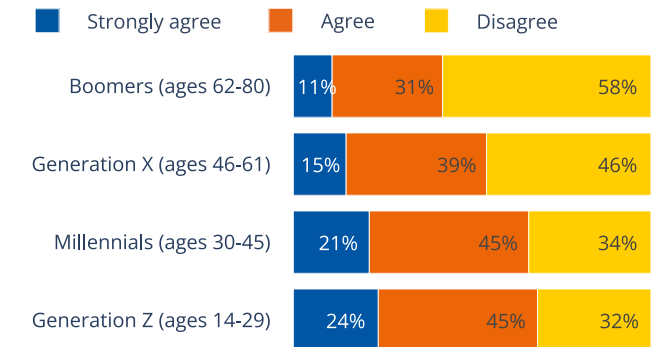


Percentages may not total 100 due to rounding. Question: 'I would trust an AI assistant to choose the retailer and delivery option for me, as long as it meets my preferred price and delivery time.'

Source: RetailX

RetailX 2026
RXS230WP-CX-32-v9

Shoppers willing to let AI choose retailer and delivery options, by generation

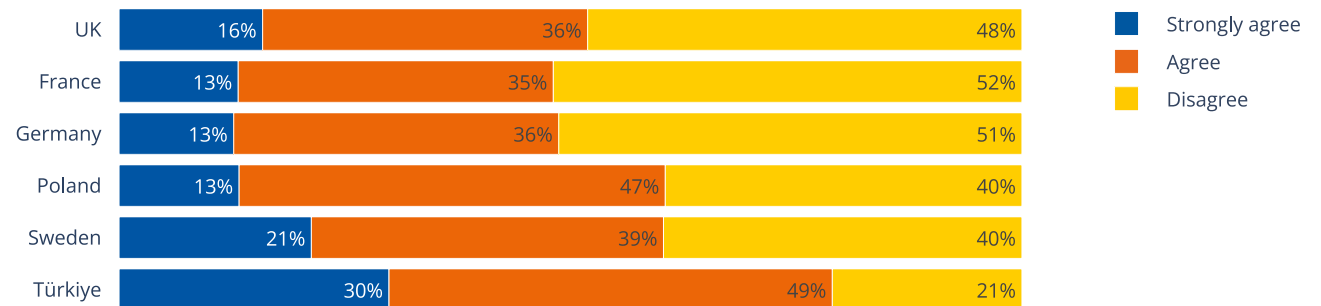


Percentages may not total 100 due to rounding. Question: 'I would trust an AI assistant to choose the retailer and delivery option for me, as long as it meets my preferred price and delivery time.'

Source: RetailX

RetailX 2026
RXS230WP-CX-5-v2

Shoppers willing to let AI choose retailer and delivery options, by country



Percentages may not total 100 due to rounding. Question: 'I would trust an AI assistant to choose the retailer and delivery option for me, as long as it meets my preferred price and delivery time.'

Source: RetailX

RetailX 2026
RXS230WP-CX-5-v5

AI for retailer and delivery choices

Nearly six in ten (58%) shoppers say they are happy to set their preferred price and delivery times, then let an AI assistant choose the retailer and delivery options that best suit their requirements.

Younger consumers are most likely to trust AI to choose retailer and delivery options, with around two-thirds of Generation Z (69%) and Millennials (66%) happy to outsource this task. But 42% of Boomers also say they trust AI to make these choices for them.

Turkish consumers are the most trusting, at 79%, with 30% strongly agreeing they would trust the choices made—a figure around twice that of most other countries. This is followed by Sweden and Poland, with 60% each agreeing in total.

AI for adding to basket

Shoppers are also happy for AI to handle more of their shopping tasks, so long as they have set the boundaries within which AI can shop on their behalf. More than half (54%) of shoppers are happy for AI to add items to their online shopping basket, but want to review and approve the order before paying.

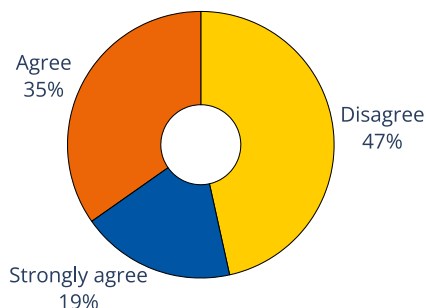
68% of Generation Z are happy for AI to do this, with 30% strongly agreeing, compared to 35% of Boomers overall.

After Türkiye (73%), shoppers in Poland (60%) and the UK (51%) are the countries most willing to let an AI assistant add items to their online shopping basket.

[1] <https://www.abc.net.au/news/2026-01-20/woolworths-google-ai-items-shopping-groceries/106243642>

[2] <https://www.techbuzz.ai/articles/target-deploys-chatgpt-shopping-app-as-openai-expands-retail-push>

Shoppers willing to let AI add items to their basket with final approval

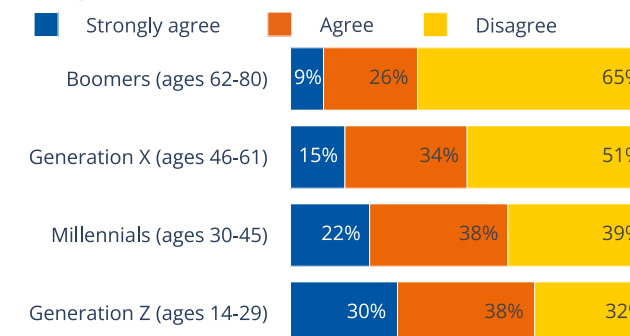


Percentages may not total 100 due to rounding. Question: 'I would be happy for an AI assistant to add items to my online shopping basket for me, as long as I can review and approve the order before paying.'

Source: RetailX

RetailX 2026
RXS230WP-CX-30-v7

Shoppers willing to let AI add items to their basket with final approval, by generation

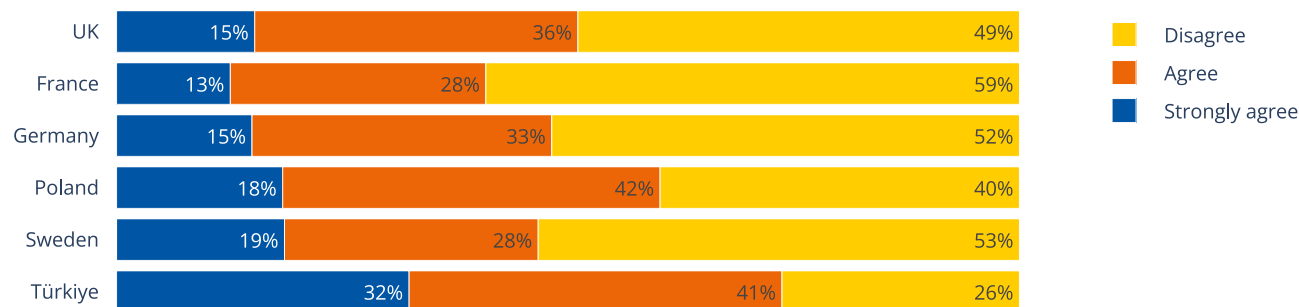


Percentages may not total 100 due to rounding. Question: 'I would be happy for an AI assistant to add items to my online shopping basket for me, as long as I can review and approve the order before paying.'

Source: RetailX

RetailX 2026
RXS230WP-CX-1-v3

Shoppers willing to let AI add items to their basket with final approval, by country



Percentages may not total 100 due to rounding. Question: 'I would be happy for an AI assistant to add items to my online shopping basket for me, as long as I can review and approve the order before paying.'

Source: RetailX

RetailX 2026
RXS230WP-CX-1-v5

Four in ten consumers want AI to complete the purchase for them

Four in ten (41%) of consumers want AI tools to go further, completing the purchase for them rather than just suggesting products, comparing prices or adding items to their basket, without them having to check all the details. 12% feel strongly about this.

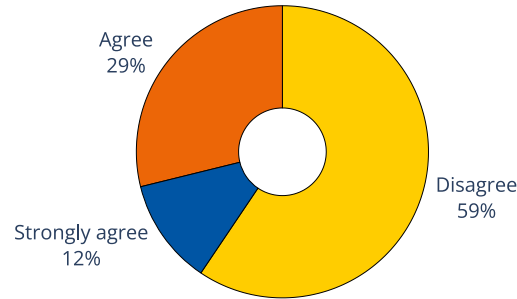
More than half (53%) of Generation Z prefer AI to complete the purchase rather than just suggest products, compared to only a quarter (24%) of Boomers.

Openness to AI completing purchases on their behalf is most prevalent for shoppers in Türkiye, where two-thirds (65%) prefer AI to handle the whole purchase process.

That's followed by 42% of UK shoppers. French shoppers are the least willing to let AI take over, with only 28% agreeing.



People who prefer AI to complete purchases rather than only suggest products

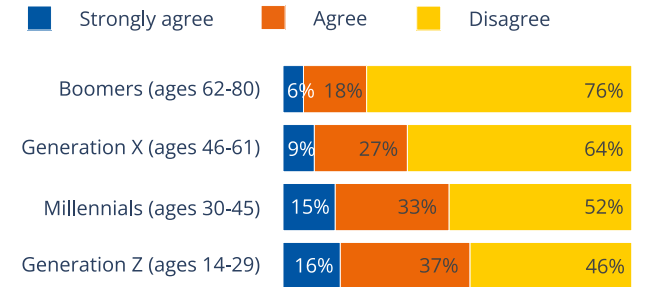


Percentages may not total 100 due to rounding. Question: 'When an AI assistant helps with my shopping, I prefer it to be able to complete the purchase for me, not just suggest products.'

Source: RetailX

RetailX 2026
RXS230WP-CX-26-v10

Shoppers who prefer AI to complete purchases rather than only suggest products, by generation

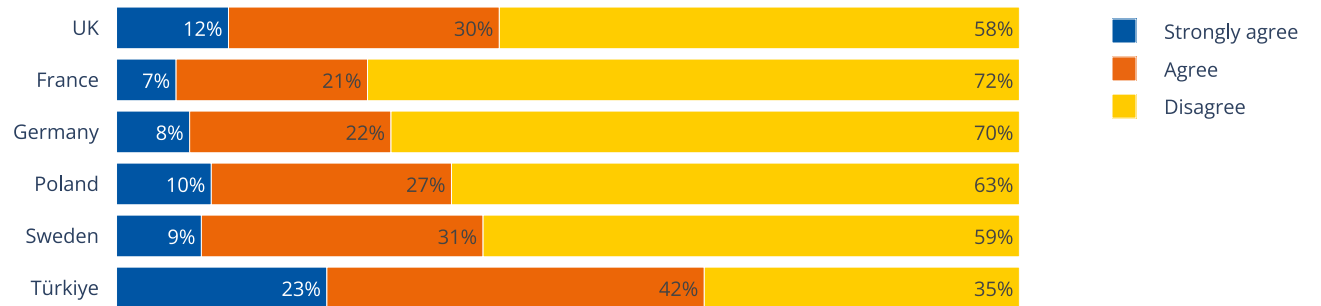


Question: 'When an AI assistant helps with my shopping, I prefer it to be able to complete the purchase for me, not just suggest products.'

Source: RetailX

RetailX 2026
RXS230WP-CX-7-v4

Shoppers who prefer AI to complete purchases rather than only suggest products, by country



Percentages may not total 100 due to rounding. Question: 'When an AI assistant helps with my shopping, I prefer it to be able to complete the purchase for me, not just suggest products.'

Source: RetailX

RetailX 2026
RXS230WP-CX-7-v9

AI for automatic routine purchases

This consent for AI assistants to automatically buy on shoppers' behalf is strongest for routine purchases, such as groceries or repeat household items, where 45% of shoppers will consent, with 15% strongly agreeing.

Six in ten (60%) of Generation Z shoppers are happy for AI to automatically place routine orders on their behalf, compared to less than a third of Boomers (28%).

By country (chart not featured), Turkish (61%) and Polish (49%) consumers are most comfortable with AI handling their routine purchase ordering.

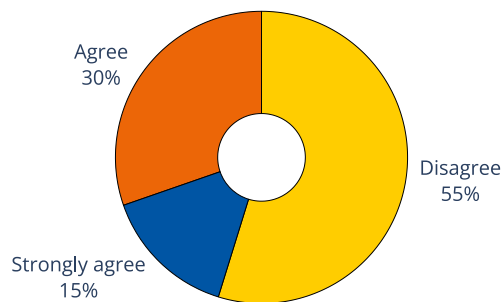
AI to monitor prices and buy when the price is right

Other shoppers are more cautious, happy for AI to purchase for them—but only when the price is right. Six in ten consumers (63%) would like an AI assistant that can monitor prices for them and automatically buy when the price drops below a level set by them.

Seven in ten Millennials (71%) and Generation Z (73%) would like to have such an assistant, with 26% of Millennials and 29% of Generation Z strongly agreeing.

By country (chart not featured), 82% of Turkish consumers would like to see this functionality, compared to just over half (52%) of UK shoppers.

Shoppers comfortable with AI automatically placing routine orders

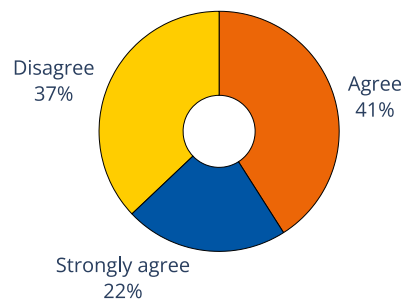


Percentages may not total 100 due to rounding. Question: 'For routine purchases (for example, groceries or repeat household items), I would be comfortable allowing an AI assistant to place orders automatically without me checking every detail.'

Source: RetailX

RetailX 2026
RXS230WP-CX-33-v11

Shoppers willing to let AI monitor prices and buy when the price is right

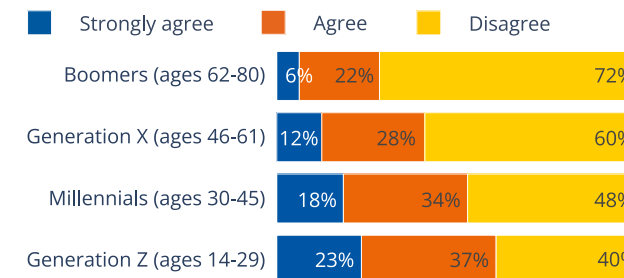


Percentages may not total 100 due to rounding. Question: 'I would like an AI assistant that can monitor prices and automatically buy a product for me when the price drops below a level I have set.'

Source: RetailX

RetailX 2026
RXS230WP-CX-27-v9

Shoppers comfortable with AI automatically placing routine orders, by generation

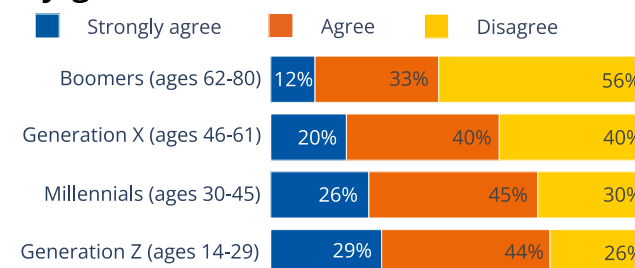


Percentages may not total 100 due to rounding. Question: 'For routine purchases (for example, groceries or repeat household items), I would be comfortable allowing an AI assistant to place orders automatically without me checking every detail.'

Source: RetailX

RetailX 2026
RXS230WP-CX-2-v9

Shoppers willing to let AI monitor prices and buy when the price is right, by generation



Percentages may not total 100 due to rounding. Question: 'I would like an AI assistant that can monitor prices and automatically buy a product for me when the price drops below a level I have set.'

Source: RetailX

RetailX 2026
RXS230WP-CX-3-v9

Nearly eight in ten want to verify an AI purchase

AI feeds on customer data to recommend products, which means shoppers must be willing to share this valuable resource and trust in AI is essential. Just over half (53%) say they are comfortable with retailers using their data to allow AI tools to provide more personalised product recommendations.

Older shoppers are more cautious, with nearly two-thirds (63%) of Boomers not comfortable sharing this information, compared with 39% of Generation Z. By country (chart not featured), French and Polish consumers are least comfortable sharing their data (43% and 46% respectively).

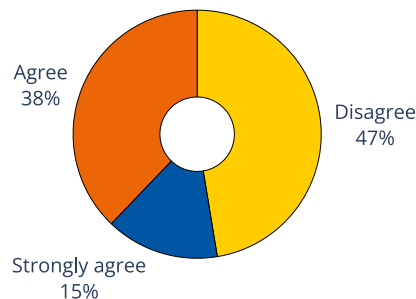
Comfort with retailers' own AI tools

Although retailers such as Amazon are developing their own AI tools, more than two-thirds (68%) of shoppers say they would prefer to use their own AI assistant, such as ChatGPT, Gemini or Perplexity, rather than those provided by retailers.

Younger shoppers most prefer the autonomy of their own AI assistant, with three-quarters (74%) choosing this option. This compares to more than half (58%) of Boomers.

By country (chart not featured), UK shoppers are the least likely to want to use their own AI assistant (41%), while Turkish shoppers are the most likely (78%).

Shoppers comfortable with retailers using their data for AI personalisation

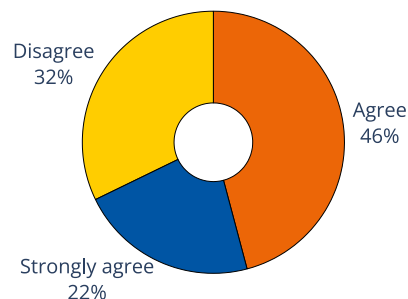


Percentages may not total 100 due to rounding. Question: 'I am comfortable with retailers using my data so that AI tools can provide more personalised product recommendations.'

Source: RetailX

RetailX 2026
RXS230WP-CX-18-v6

Shoppers who prefer using their own AI assistant rather than retailer-provided AI tools

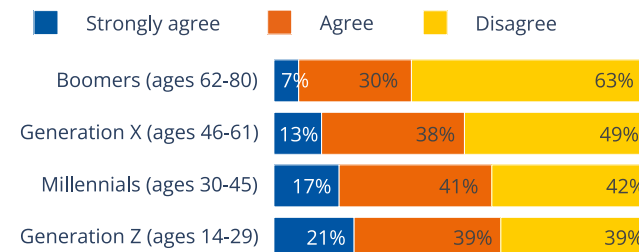


Percentages may not total 100 due to rounding. Question: 'When shopping online, I prefer to use my own AI assistant.'

Source: RetailX

RetailX 2026
RXS230WP-CX-21-v5

Shoppers comfortable with retailers using their data for AI personalisation, by generation

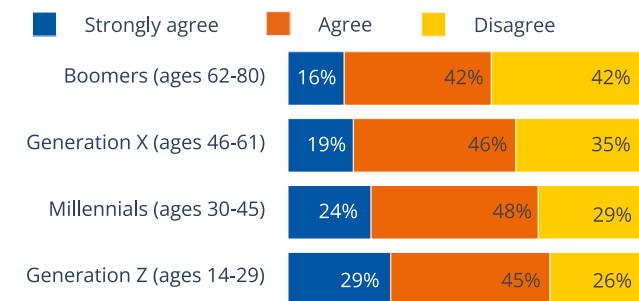


Percentages may not total 100 due to rounding. Question: 'I am comfortable with retailers using my data so that AI tools can provide more personalised product recommendations.'

Source: RetailX

RetailX 2026
RXS230WP-CX-17-v3

Shoppers who prefer using their own AI assistant rather than retailer-provided AI tools, by generation



Percentages may not total 100 due to rounding. Question: 'When shopping online, I prefer to use my own AI assistant.'

Source: RetailX

RetailX 2026
RXS230WP-CX-19-v2

Allowing AI to act only for trusted brands

Consumer trust in AI depends heavily on the brand or retailer, according to the survey results. Six in ten (61%) of shoppers will only let an AI assistant act for them or complete a purchase on their behalf if it's managed by a brand they already know and trust, with 20% feeling strongly about this.

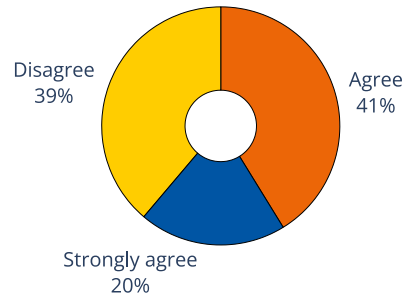
Verifying AI purchases

Nearly eight in ten (77%) of shoppers will still verify the information when AI recommends products to them, whether that's by looking at information on the retailer's website or checking reviews.

Sentiment between generations doesn't vary so widely here. Although 79% of Generation Z consumers will still verify information, this is only marginally higher than the number of Boomers (72%) who will do the same.

However, the number of those strongly agreeing that they would verify AI recommendations before purchase is higher among Generation Z (36%) and Millennials (32%) than among Generation X (27%) and Boomers (26%).

Shoppers who would only allow AI to act for them if managed by a trusted brand

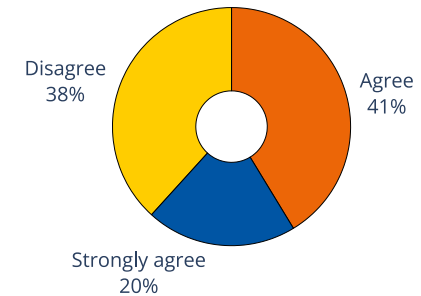


Percentages may not total 100 due to rounding. Question: 'I would only allow an AI assistant to act for me if it's managed by a brand I already know and trust.'

Source: RetailX

RetailX 2026
RXS230WP-CX-29-v10

Shoppers who require AI purchases to be limited to trusted retailers

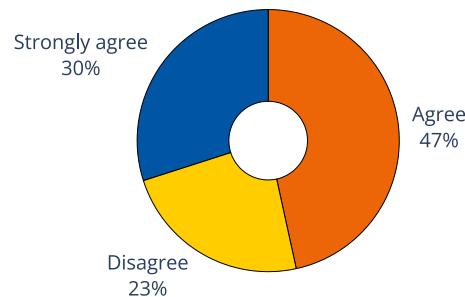


Percentages may not total 100 due to rounding. Question: 'I would only allow an AI assistant to complete a purchase if the retailer or brand is one I already know and trust.'

Source: RetailX

RetailX 2026
RXS230WP-CX-28-v8

Shoppers who verify AI recommendations before purchase

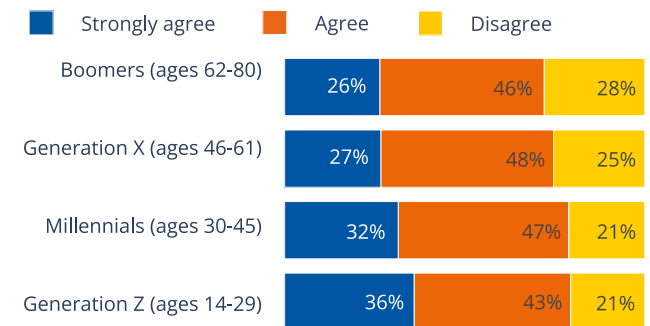


Percentages may not total 100 due to rounding. Question: 'When AI recommends a product, I still verify the information.'

Source: RetailX

RetailX 2026
RXS230WP-CX-20-v5

Shoppers who verify AI recommendations before purchase, by generation



Percentages may not total 100 due to rounding. Question: 'When AI recommends a product, I still verify the information.'

Source: RetailX

RetailX 2026
RXS230WP-CX-14-v2

Packaging's influence on customer experience



Sentiment strengthens as protection and sustainability remain key

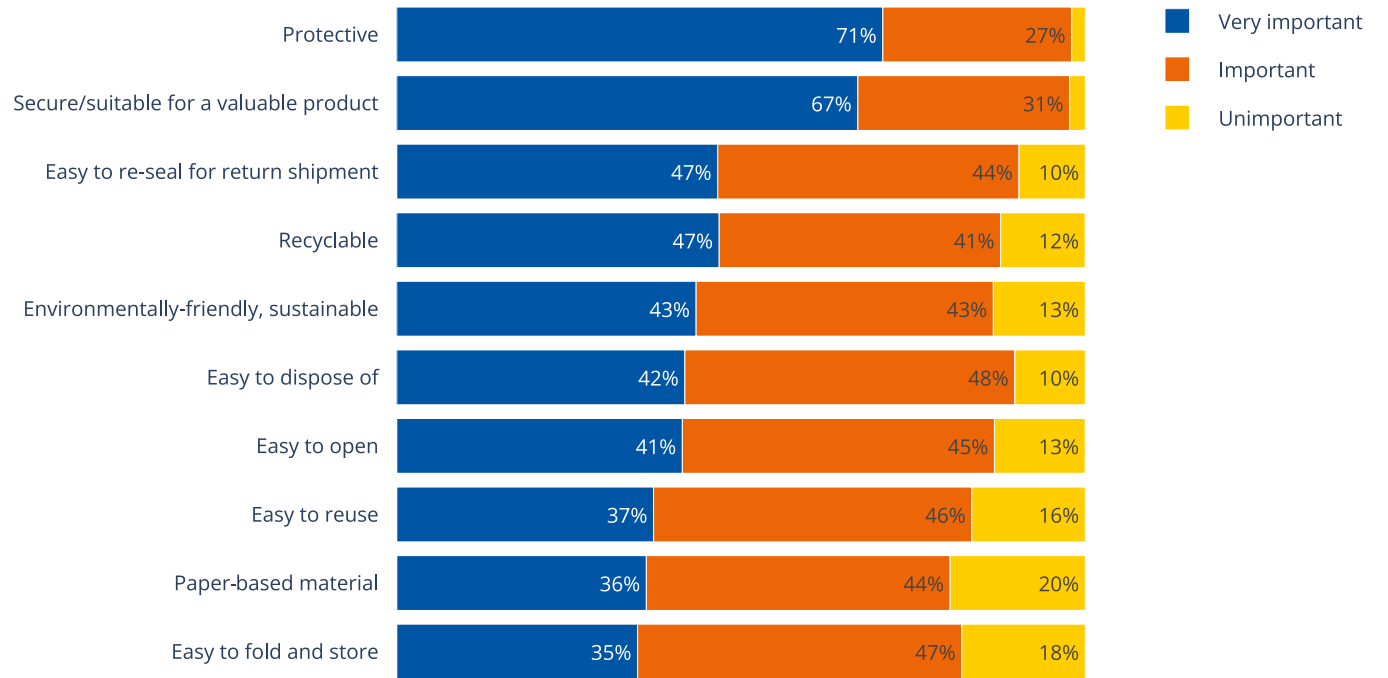
Packaging innovation means little if it's not related to customer needs. Understanding what consumers rate as the key functions of the packaging they receive their eCommerce orders in is one of the most important questions in Mondi Group's annual survey.

Once again, product protection is consumers' primary need, with 98% rating it very important or important (vs 95% in 2025). Sentiment is stronger this year, with seven in ten (71%) rating product protection very important (vs 56% in 2025). The same majority (98%) care that eCommerce packaging is suitable for a valuable product (vs 95% in 2025). 67% now rate it very important, up from 53% last year.

Packaging that is easy to reseal for returns is also rated highly. Nine in ten (91%) consumers say this is important (vs 85% in 2025), with nearly half (47%) saying it's very important.

In addition to the need for protection and ease of use, sustainability demands have also increased. 88% of consumers want eCommerce packaging to be recyclable (vs 78% in 2025). Meanwhile, 86% want it to be sustainable (vs 80% in 2025). The desire for paper-based material has also increased, with eight in ten (80%) rating its importance (vs 68% in 2025).

Importance of packaging features



Percentages may not total 100 due to rounding. Question: 'How important are these aspects of packaging to you when you have online orders delivered?'

Source: RetailX

© RetailX 2026

RXS230WP-CX-1-v6

More than half of online shoppers willing to pay more for suitable packaging

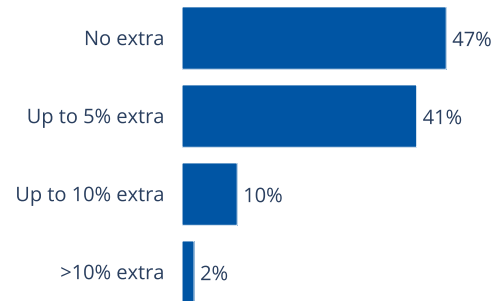
Suitable eCommerce packaging can not only help retailers win repeat sales, but also prevent them from losing money on sales already made. Adequate protection helps prevent broken or damaged items that retailers might otherwise have to replace, thereby reducing additional return and replacement costs.

According to the results, consumers realise there is a price for the convenience of having goods delivered, which goes beyond the delivery charge and also includes the packaging they arrive in. More than half (53%) say they are happy to bear at least some of the cost of packaging that best suits their needs. Four in ten (41%) will pay up to 5% more, while one in ten (10%) will pay up to 10% more (vs 6% in 2025).

Millennials and Generation Z consumers are least likely to refuse to pay more (Millennials 40% and Generation Z 39%). By contrast, six in ten (60%) of Boomers won't pay any extra.

Consumers in Sweden and France are the least willing to pay more at 53% each. Turkish and Polish consumers are the most willing, with only 35% and 40% respectively, refusing to do so. The same pattern was evident in last year's survey.

Willingness to pay extra for suitable eCommerce packaging

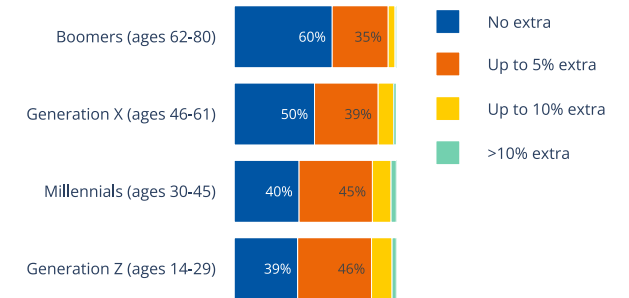


Question: 'How much extra would you be willing to pay when ordering online products for packaging that meets your requirements?'

Source: RetailX

RetailX 2026
RXS230WP-CX-2-v4

Willingness to pay extra for suitable eCommerce packaging, by generation

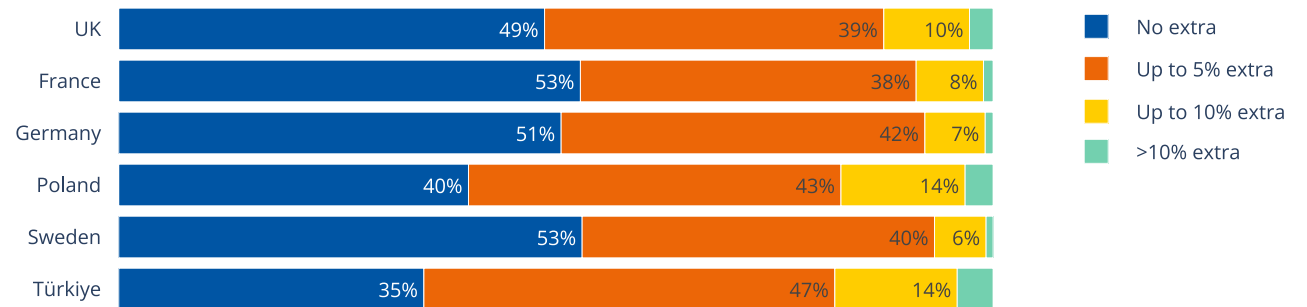


Percentages may not total 100 due to rounding. Question: 'How much extra would you be willing to pay when ordering online products for packaging that meets your requirements?'

Source: RetailX

RetailX 2026
RXS230WP-CX-61-v5

Willingness to pay extra for suitable eCommerce packaging, by country



Percentages may not total 100 due to rounding. Question: 'How much extra would you be willing to pay when ordering online products for packaging that meets your requirements?'

Source: RetailX

RetailX 2026
RXS230WP-CX-61-v5

A quarter of consumers are always willing to pay for returns

Previously, paying for returns has been a contentious issue for many customers. Today, the wider rollout^[1] of paid online returns to tackle soaring product return rates has become a more accepted strategy for changing consumer behaviour.

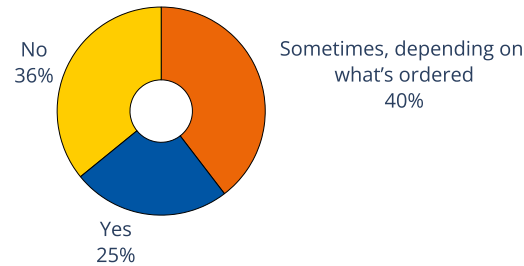
In this year's survey, a quarter (25%) of consumers are always willing to pay extra for returns (vs 20% in 2025) and 4 in 10 (40%) are willing to pay sometimes, depending on what they've ordered (v 42% in 2025).

As last year, Millennials are the most willing to always pay for returns (29%), followed by Generation Z (26%). Boomers are the most resistant, with 41% refusing to pay extra for returns. This generational divide reflects the pattern seen in consumer willingness to pay extra for packaging that best suits their needs.

At 31%, Polish consumers are the most willing to always pay for returns—a pattern also seen in last year's report—and only 24% don't want to pay extra. By contrast, nearly half of consumers in France (47%) and Türkiye (46%) don't want to pay extra.

[1] <https://internetretailing.net/three-in-four-uk-retailers-now-charge-for-returns-as-costs-spiral/>

Willingness to pay extra for returns

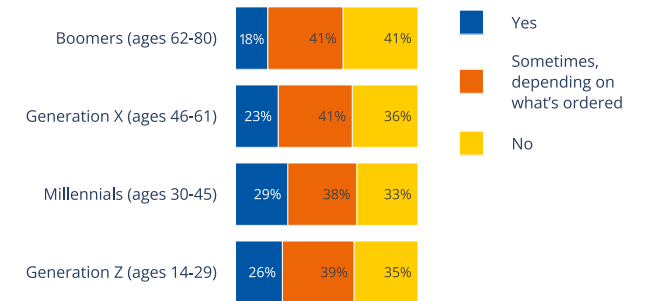


Percentages may not total 100 due to rounding. Question: 'Would you be willing to pay extra to return products you no longer like or regret ordering?'

Source: RetailX

RetailX 2026
RXS230WP-CX-3-v4

Willingness to pay extra for returns, by generation

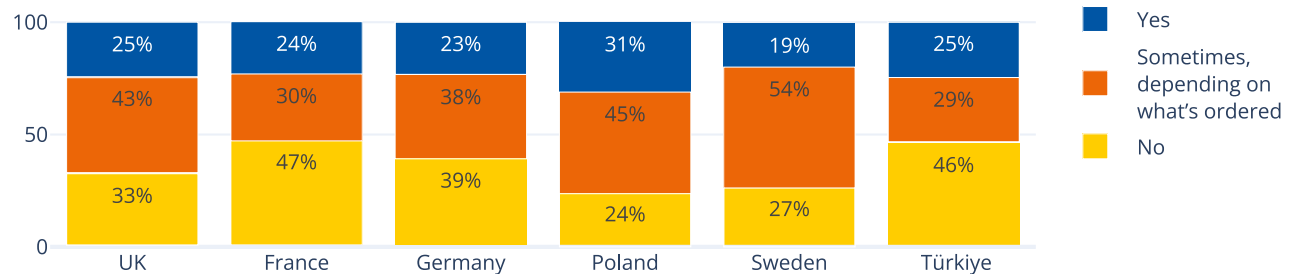


Percentages may not total 100 due to rounding. Question: 'Would you be willing to pay extra to return products you no longer like or regret ordering?'

Source: RetailX

RetailX 2026
RXS230WP-CX-62-v2

Willingness to pay extra for returns, by country



Percentages may not total 100 due to rounding. Question: 'Would you be willing to pay extra to return products you no longer like or regret ordering?'

Source: RetailX

RetailX 2026
RXS230WP-CX-62-v5

Two-thirds say packaging features contribute to an unboxing experience that encourages them to buy again

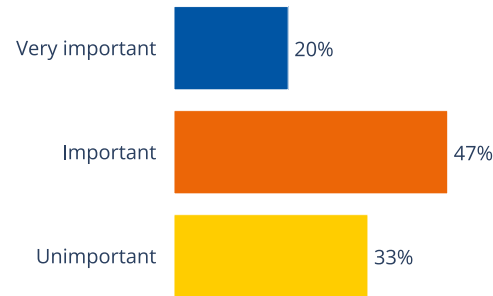
Rather than just being functional, eCommerce packaging should also wow customers, especially if retailers use packaging design and material innovation to deliver an experience that's more than just a corrugated box.

Two-thirds (67%) of consumers say packaging features, such as shape, material or personalisation, play an important role in creating an unboxing experience that encourages them to buy again (vs 59% in 2025), with one in five (20%) rating it very important (vs 13% in 2025).

Younger consumers have grown up with unboxing as reflected in the survey results. Nearly eight in ten (79%) of Generation Z say packaging features contribute to a positive unboxing experience and repeat purchasing. 27% say it's very important (vs 17% in 2025), compared to 11% of Boomers.

As with last year, Turkish consumers are by far the most swayed by unboxing to buy again at 89%. 35% rate packaging's role very important, treble the number of Swedes (11%).

The importance of packaging in creating an unboxing experience that encourages repeat purchases

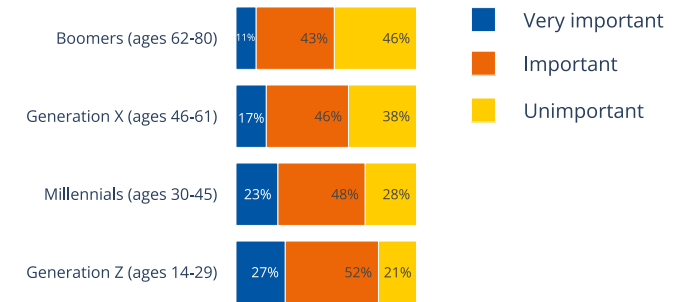


Question: 'How important is packaging (shape, material, appearance, or personalisation) to creating an 'unboxing experience' for you which convinces you to order from the same retailer again?'

Source: RetailX

RetailX 2026
RXS230WP-CX-4-v4

The importance of packaging in creating an unboxing experience that encourages repeat purchases, by generation

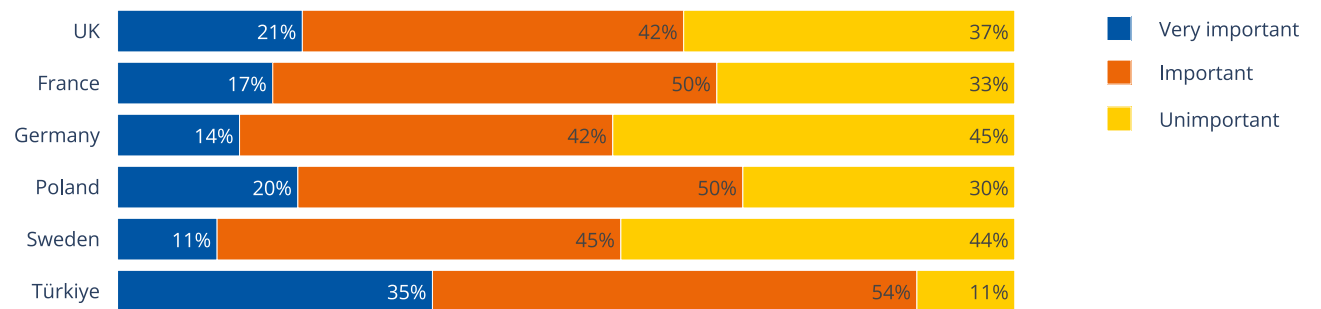


Percentages may not total 100 due to rounding. Question: 'How important is packaging (shape, material, appearance, or personalisation) to creating an 'unboxing experience' for you which convinces you to order from the same retailer again?'

Source: RetailX

RetailX 2026
RXS230WP-CX-63-v4

The importance of packaging in creating an unboxing experience that encourages repeat purchases, by country



Percentages may not total 100 due to rounding. Question: 'How important is packaging (shape, material, appearance, or personalisation) to creating an 'unboxing experience' for you which convinces you to order from the same retailer again?'

Source: RetailX

RetailX 2026
RXS230WP-CX-63-v6

Appropriately-sized packaging and ease of opening important for half of consumers

If packaging is important for creating an unboxing experience that persuades customers to shop again, it's useful to understand what they like so much about it.

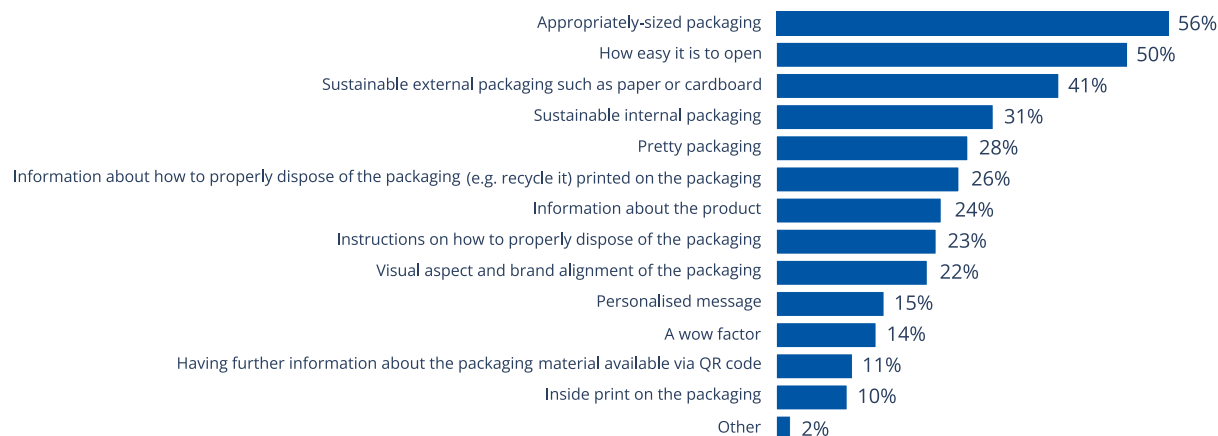
More than half (56%) of consumers cite appropriately sized packaging as a positive influence, almost the same as last year (58%). As the report later shows (page 23 and page 32), consumers don't appreciate packaging waste.

At 50%, ease of opening is the next most important factor, the same percentage as last year. This is followed by sustainability, with 41% wanting to see sustainable external packaging used and 31% sustainable internal packaging, again similar to 2025.

Packaging's design also plays a key role in the unboxing experience. 28% want to see pretty packaging, while around a quarter want to see information printed on the packaging, whether that's product information (24%) or details on how to responsibly dispose of packaging (23%).

French and German consumers are most swayed by appropriately -sized packaging, at 64% each. By generation, Boomers are the generation most influenced by the top three unboxing factors, a pattern also evident last year.

The factors that create a good unboxing experience

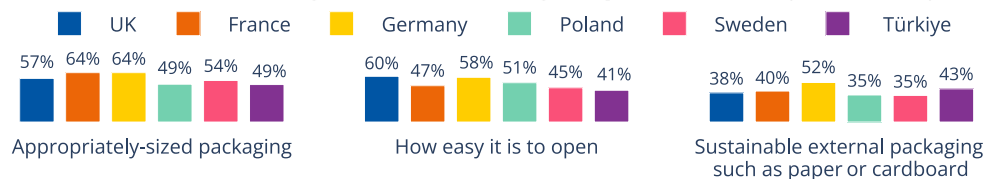


Question: 'What factors are most important in a good unboxing experience?'

Source: RetailX

RetailX 2026
RXS230WP-CX-5-v14

The factors that create a good unboxing experience, by country

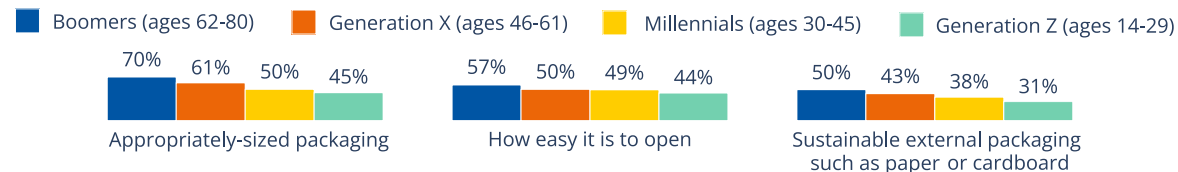


Question: 'What factors are most important in a good unboxing experience?'

Source: RetailX

RetailX 2026
RXS230WP-CX-98-v6

The factors that create a good unboxing experience, by generation



Question: 'What factors are most important in a good unboxing experience?'

Source: RetailX

RetailX 2026
RXS230WP-CX-98-v2

A quarter of Generation Z consumers say packaging personalisation is important

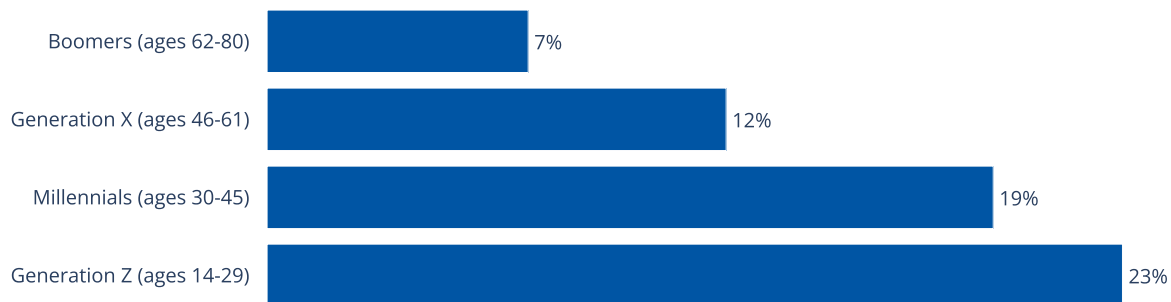
Personalising packaging is another way to add a wow factor to the unboxing experience. The unboxing factors chart on the previous page shows that 15% say that personalised messages on the eCommerce packaging they receive help to promote a positive unboxing experience.

This could include a range of digitally printed messages or QR codes that allow more dynamic content and can be tailored to the individual or their order. This helps enable further storytelling and social sharing and can also replace printed inserts, further reducing material use.

Generation Z consumers are most influenced by packaging personalisation, with 23% saying it is important in a positive unboxing experience. This is more than three times the number of Boomers influenced by personalised messages (7%).

A quarter (26%) of Turkish customers believe that personalised messages are important in a good unboxing experience, followed by 18% of Swedes and 15% of customers in the UK and Poland. Consumers in France and Germany seem the least interested in personalised messages at 10%.

The role of personalised messages, by generation

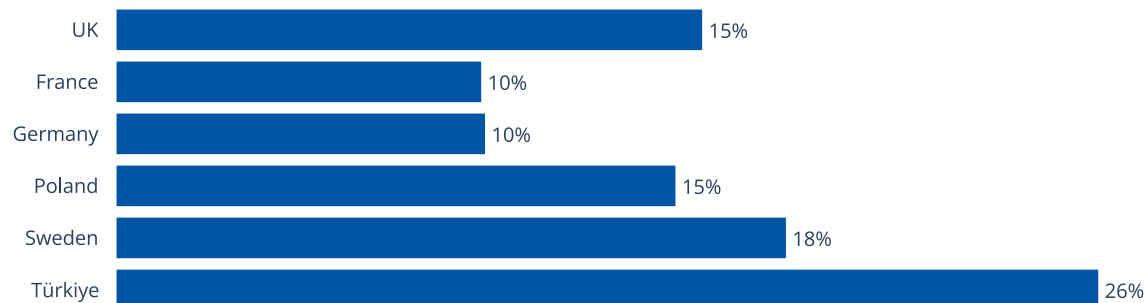


Question: 'What factors are most important in a good unboxing experience?'

Source: RetailX

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RXS230WP-CX-65-v1

The role of personalised messages, by country



Question: 'What factors are most important in a good unboxing experience?'

Source: RetailX

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RXS230WP-CX-65-v3



**The importance
of packaging
sustainability for
shoppers**

Seven in ten shoppers won't buy again if oversized packaging is used

The impact of sustainable packaging on consumer buying behaviour is highlighted by the packaging-related reasons that shoppers would avoid buying from a retailer again.

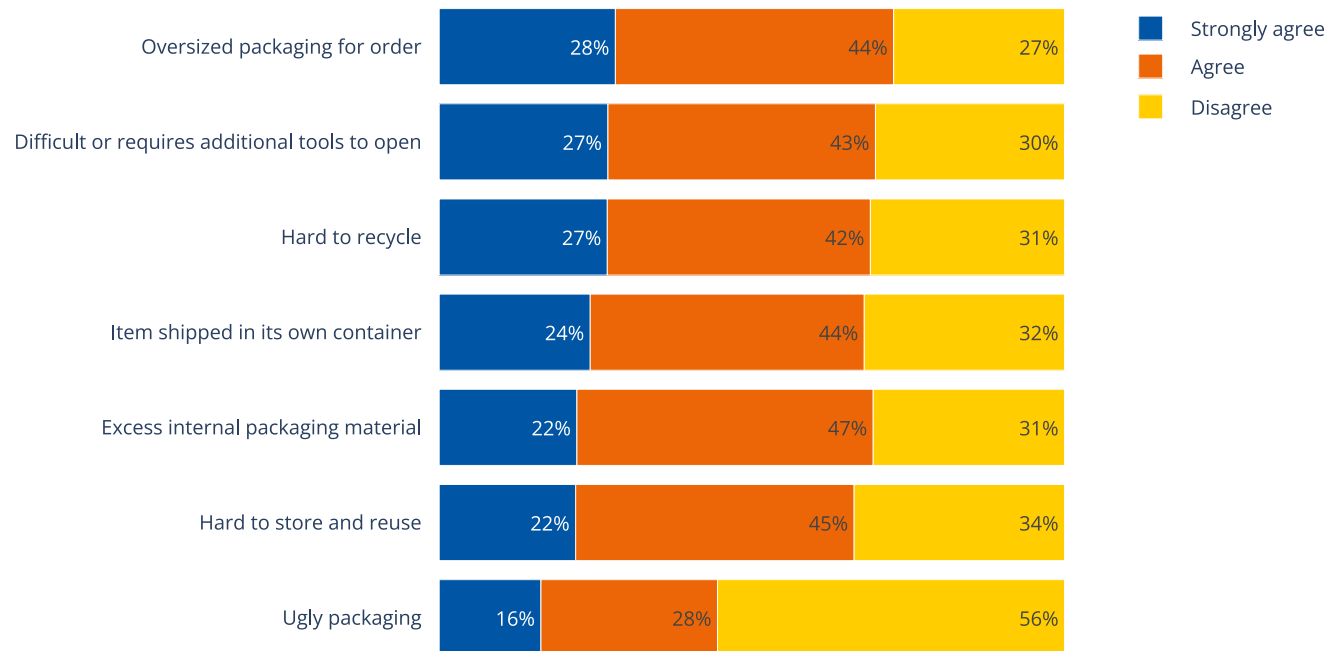
Customers most dislike overpackaging, with 72% avoiding shopping with a retailer again if oversized packaging is used and 69% if excess internal packaging is present.

Such sentiment has grown strongly since 2025, when only 45% said they would avoid shopping with a retailer that used oversized packaging and 40% if excess internal packaging was included.

More than two-thirds (69%) are put off by hard-to-recycle packaging (vs 41% in 2025). The results show that consumers care more about sustainability than the appearance of eCommerce packaging. 44% say they would avoid shopping with an online retailer that had ugly eCommerce packaging (vs 28% in 2025).

(NB: In the previous survey, consumers also had the option to say they neither agreed nor disagreed with statements.)

Packaging-related reasons people would avoid shopping with a retailer again



Percentages may not total 100 due to rounding. Question: 'I would avoid shopping with an online retailer whose packaging fell in any of these categories'

Source: RetailX

Desire for sustainable packaging increases

The survey repeatedly shows that customers value sustainable eCommerce packaging. But it's important for retailers too, given evolving legislation such as the Packaging and Packaging Waste Regulation (PPWR)^[1], which aims to tackle packaging waste and entered into force in 2025. Two provisions are the requirements that from 2030 all packaging must be recyclable and that the empty space within eCommerce packaging is minimised.

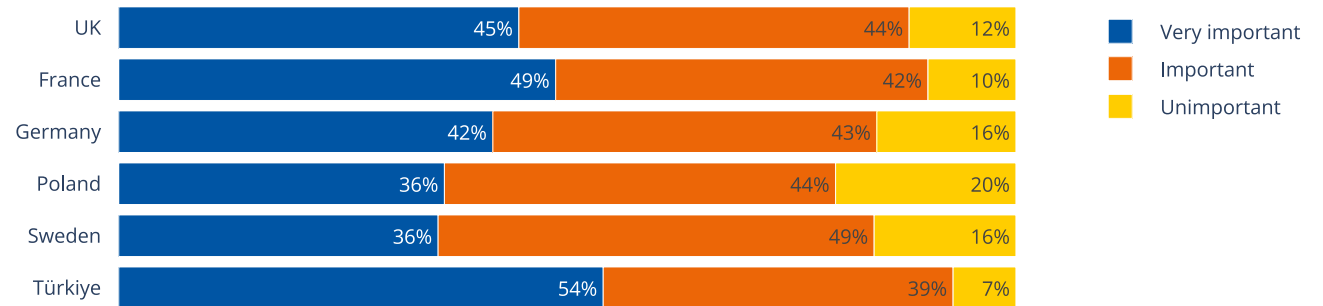
In the earlier importance of packaging features chart (page 16), 86% of consumers said that sustainable packaging was important or very important to them. Here, the report delves deeper into the country and generation splits for this question.

Turkish and French customers feel most strongly, with 93% and 91% respectively rating it important or very important. Around half in both countries (54% and 49%) rate it very important. By contrast, one in five (20%) of Polish consumers rate sustainable packaging as unimportant and only 36% rate it very important.

The importance of sustainable packaging is almost identical across all ages, with around four in ten rating it very important and the same rating it as important, although the strength of feeling is slightly higher for Boomers and Generation X.

[1] https://environment.ec.europa.eu/topics/waste-and-recycling/packaging-waste_en

The importance of sustainable packaging, by country

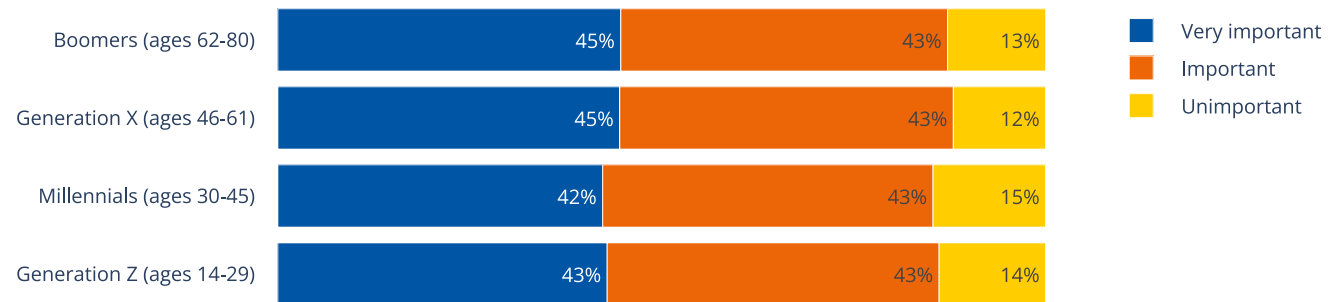


Percentages may not total 100 due to rounding. Question: 'How important is sustainable packaging to you when you have online orders delivered?'

Source: RetailX

RetailX 2026
RXS230WP-CX-4-v6

The importance of sustainable packaging, by generation



Percentages may not total 100 due to rounding. Question: 'How important is sustainable packaging to you when you have online orders delivered?'

Source: RetailX

RetailX 2026
RXS230WP-CX-4-v4

Sustainable packaging's impact on buying decisions

The results show that the desire for sustainable packaging isn't just a nice-to-have; it's an actual customer need. If customers don't see sustainable packaging in use, then a significant proportion can be put off buying from that retailer or brand.

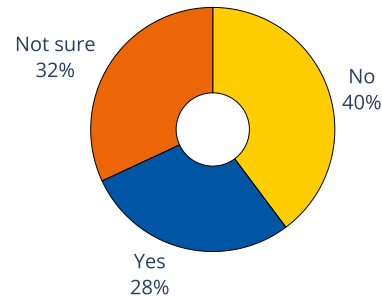
More than a quarter (28%) of consumers say that the use of plastic packaging, rather than cardboard or paper, which are perceived as more sustainable options, would put them off buying (vs 20% in 2025). Packaging innovation continues to deliver new options that offer similar, and often the same, functionality to plastic packaging but with strong sustainability credentials.

By country, around a third of UK (35%), French (34%) and Turkish (31%) consumers are put off buying by a lack of sustainable packaging. The increases from last year are consistent with the overall rise seen in sentiment.

The proportion of consumers put off buying by generation, meanwhile, is fairly consistent across the age groups, ranging from 25% of Boomers to 30% of Generation Z (vs 17% and 26% respectively in 2025).



Customers reluctant to buy due to non-sustainable packaging

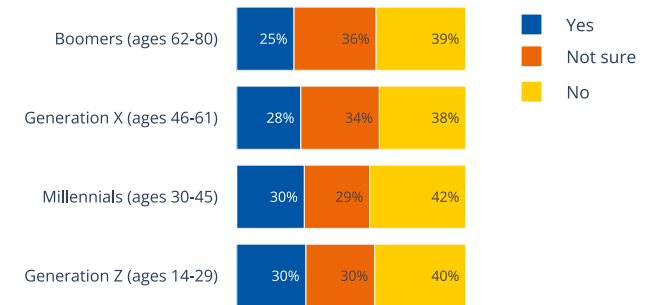


Percentages may not total 100 due to rounding. Question: 'Would a lack of sustainable packaging such as the use of plastic rather than cardboard or paper put you off buying from a retailer?'

Source: RetailX

RetailX 2026
RXS230WP-CX-6-v5

Customers reluctant to buy due to non-sustainable packaging, by generation

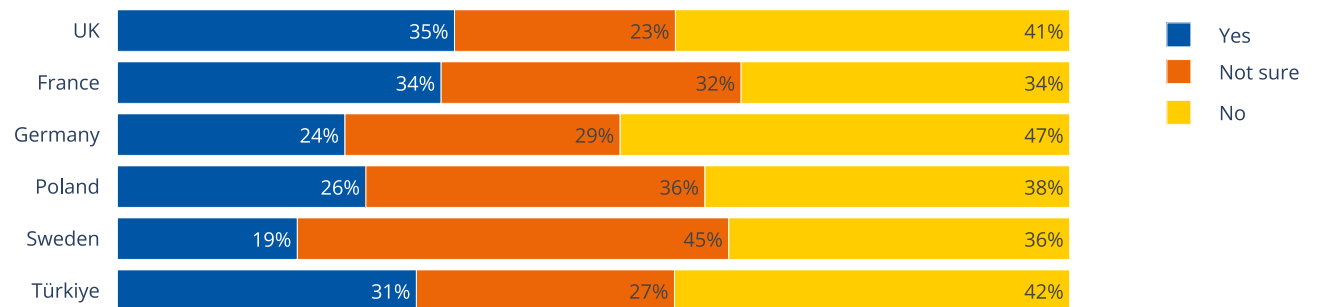


Percentages may not total 100 due to rounding. Question: 'Would a lack of sustainable packaging such as the use of plastic rather than cardboard or paper put you off buying from a retailer?'

Source: RetailX

RetailX 2026
RXS230WP-CX-78-v6

Customers reluctant to buy due to non-sustainable packaging, by country



Percentages may not total 100 due to rounding. Question: 'Would a lack of sustainable packaging such as the use of plastic rather than cardboard or paper put you off buying from a retailer?'

Source: RetailX

RetailX 2026
RXS230WP-CX-78-v7

Four in ten consumers notice more responsible use of packaging

The survey shows that consumers care about sustainable packaging, but do they notice improvements from the retailers and brands they shop with?

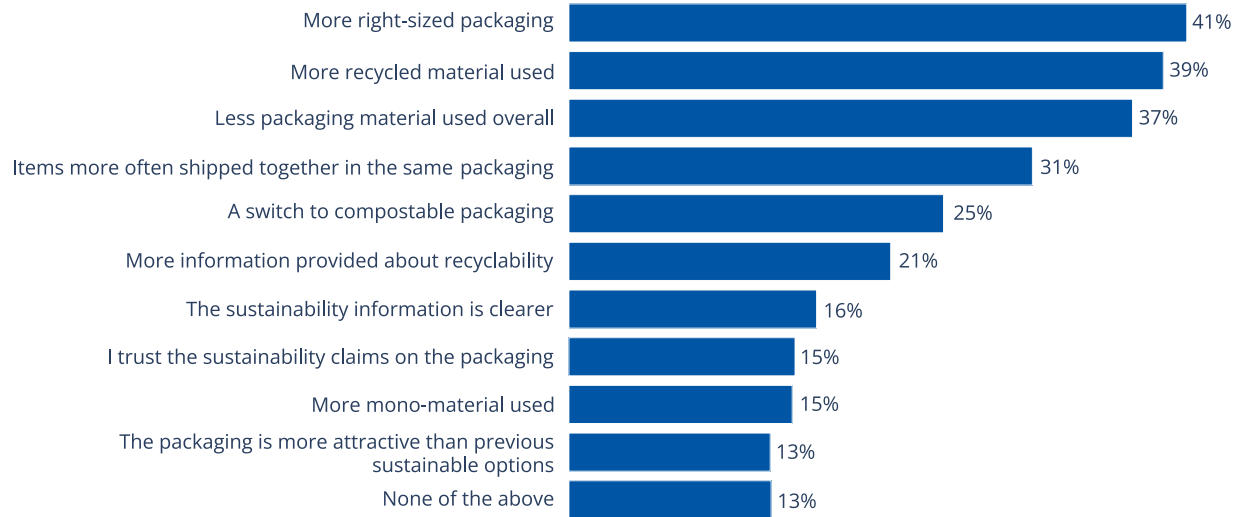
Looking at the packaging sustainability efforts consumers have noticed over the last 12 months, the numbers are similar to last year. Overall, around four in ten consumers have noticed the top three efforts. These include more right-sized packaging (41%), more recycled materials (39%) and less packaging overall (37%).

Education around sustainable options is also being noticed. 21% are seeing more information about the recyclability of eCommerce packaging and 16% say sustainability information is clearer.

French consumers (53%) are most likely to notice more right-sized packaging, while German consumers are most likely to notice the increased use of recycled materials (44%) and less packaging material overall (48%).

By generation, (chart not featured) Boomers are most likely to notice packaging sustainability improvements across the top three efforts (47%, 43% and 47% respectively), but the difference between younger generations is less stark (38%, 37% and 33% for Generation Z) than in many other aspects of the survey's results.

Noticed retailer efforts to improve packaging sustainability

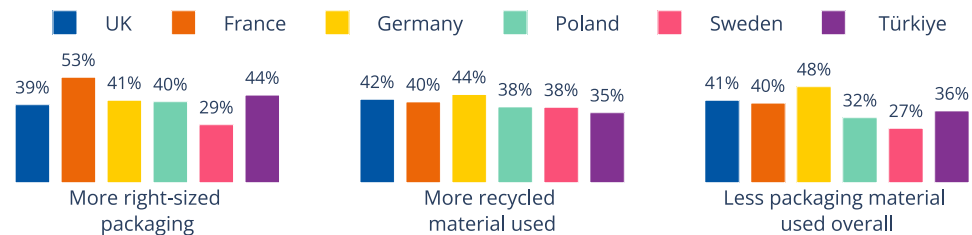


Question: 'In the last 12 months, what efforts around improving packaging sustainability from retailers have you noticed?'

Source: RetailX

RetailX 2026
RXS230WP-CX-8-v7

Noticed retailer efforts to improve packaging sustainability, by country



Question: 'In the last 12 months, what efforts around improving packaging sustainability from retailers have you noticed?'

Source: RetailX

RetailX 2026
RXS230WP-CX-99-v2

Generation Z are five times more likely than Boomers to throw packaging away

While retailers and brands can offer more sustainable packaging, they rely on their customers to dispose of it in an environmentally conscious way.

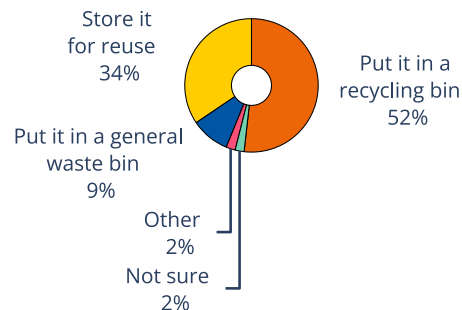
More than half (52%) of those surveyed put their eCommerce packaging in a recycling bin (vs 48% in 2025), while a third (34%) store it for reuse—whether for returns, storage or reselling a product (vs 38% in 2025). However, nearly one in ten (9%) put it in with general waste (vs 10% in 2025).

UK consumers are most likely to put their eCommerce packaging into the recycling stream, with two-thirds (67%) doing so, followed by 61% of Swedish consumers. Around four in ten German and Polish consumers put their packaging in a recycling bin or reuse it.

Of those who put their packaging in with general waste, French consumers (4%) are the least likely compared to Turkish consumers (20%), who are most likely to.

Boomers are most likely to put their packaging in a recycling bin, with nearly six in ten (59%) doing so, compared to only 42% of Generation Z. Instead, younger consumers are five times more likely (16% vs 3%) than Boomers to dispose of eCommerce packaging in general waste. Around a third of all generations store it for reuse.

What shoppers do with eCommerce packaging

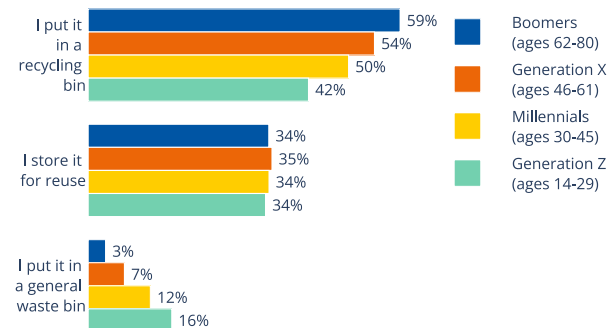


Percentages may not total 100 due to rounding. Question: 'Which of the following best describes what you do with the packaging you receive your online purchases in?'

Source: RetailX

RetailX 2026
RXS230WP-CX-35-v15

What shoppers do with eCommerce packaging, by generation

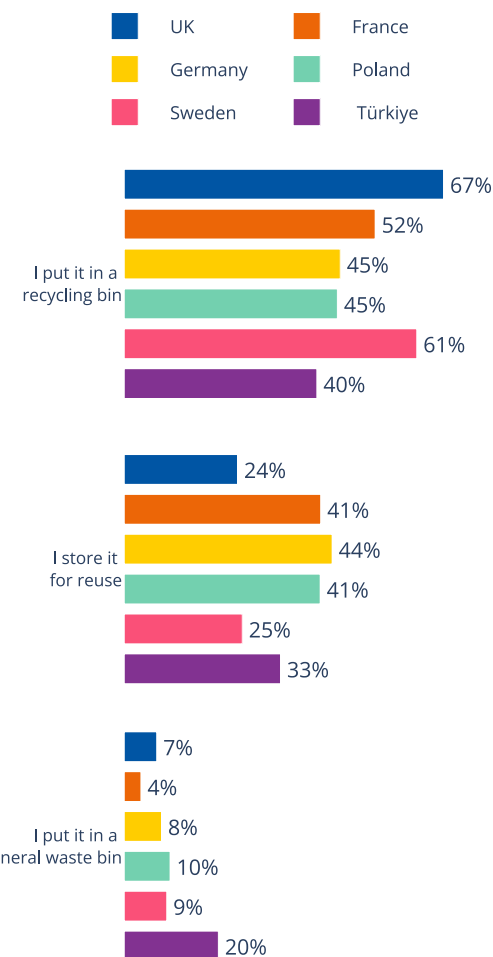


Question: 'Which of the following best describes what you do with the packaging you receive your online purchases in?'

Source: RetailX

RetailX 2026
RXS230WP-CX-97-v7

What shoppers do with eCommerce packaging, by country



Question: 'Which of the following best describes what you do with the packaging you receive your online purchases in?'

Source: RetailX

RetailX 2026
RXS230WP-CX-97-v6

One in five Generation Z knowingly throw away recyclable packaging

Of the reasons that shoppers don't put their packaging in a recycling bin, a third (35%) say they aren't sure what is recyclable (vs 28% in 2025). This rises to 45% in the UK. By generation (chart not featured), just over a third of each age group don't recycle for this reason. Overall, a quarter (26%) say recycling bins are often too full (vs 25% in 2025).

But there are more worrying factors at play as the survey dives deeper into recycling behaviour. Overall, 13% know packaging is recyclable but put it with regular waste anyway, while 12% say that it's too time-consuming to sort (vs 9% in 2025).

The generational difference here is even more concerning. Earlier, the report showed that Generation Z are the most likely to put their eCommerce packaging in the waste. But this question shows they are doing so knowingly.

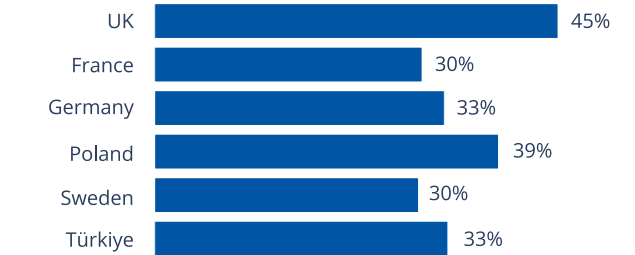
Around one in five Generation Z (19%) and Millennials (18%) know packaging is recyclable but put it in regular waste anyway, nearly four times the number of Boomers (5%) and almost twice the number of Generation X (10%). One in five (21%) Generation Z blame a lack of time, seven times the number of Boomers (3%).

Reasons customers don't put packaging in a recycling bin



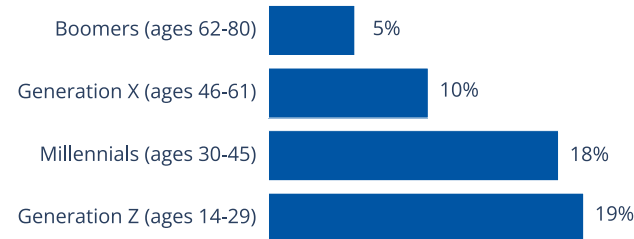
Question: 'What factors affect whether you put your eCommerce packaging in a recycling bin?'
 Source: RetailX RetailX 2026 RXS230WP-CX-10-v13

Reasons customers don't put packaging in a recycling bin, by country (not sure that packaging is recyclable)



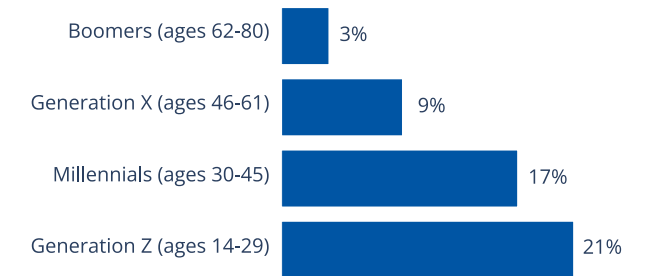
Question: 'What factors affect whether you put your eCommerce packaging in a recycling bin?'
 Source: RetailX RetailX 2026 RXS230WP-CX-16-v4

Reasons customers don't put packaging in a recycling bin, by generation (aware that it's recyclable but put it with regular waste)



Question: 'What factors affect whether you put your eCommerce packaging in a recycling bin?'
 Source: RetailX RetailX 2026 RXS230WP-CX-11-v15

Reasons customers don't put packaging in a recycling bin, by generation (sorting takes too much time)



Question: 'What factors affect whether you put your eCommerce packaging in a recycling bin?'
 Source: RetailX RetailX 2026 RXS230WP-CX-15-v5

Half of shoppers want easier-to-recycle eCommerce packaging

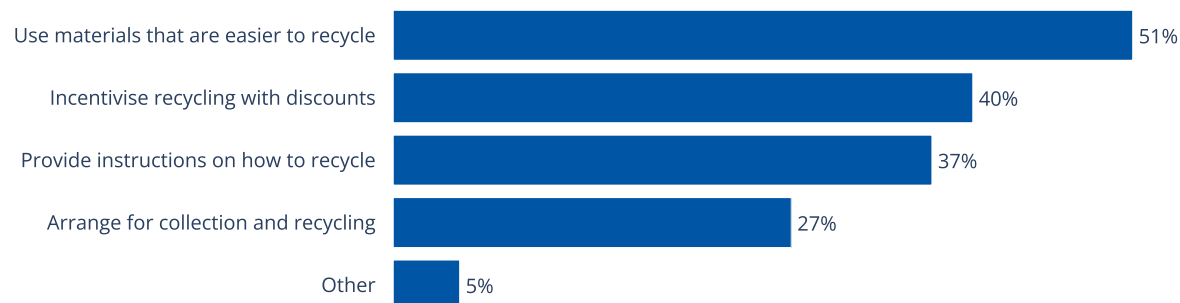
The previous charts showed some of the reasons consumers don't recycle, including a lack of knowledge about recyclability and a refusal to make the effort to sort packaging rather than bin it. But could retailers do more to support them?

Sentiment towards ways retailers can better encourage customers to put their eCommerce packaging into recycling streams is almost identical to last year's. Half (51%) of consumers want retailers to use packaging that is easier to recycle and 37% want to see instructions on how to recycle (vs 50% and 35% respectively in 2025).

By country, the strongest demand for eCommerce packaging made with materials that are easier to recycle comes from the UK (59%), Sweden (56%) and Germany (55%).

Others expect retailers to play their part in motivating them to recycle. Four in ten (40%) want to be incentivised to recycle with discounts—the same proportion as in 2025, while 27% want retailers to arrange for the collection and recycling of their packaging, up one percentage point from last year.

How retailers can encourage eCommerce packaging recycling



Question: 'How could retailers encourage you to put their eCommerce packaging in recycling bins?'

Source: RetailX

© RetailX 2026
RXS230WP-CX-11-v8

How retailers can encourage recycling by using materials that are easier to recycle, by country



Question: 'How could retailers encourage you to put their eCommerce packaging in recycling bins?'

Source: RetailX

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RXS230WP-CX-19-v5

The future of packaging



Two-thirds of customers expect recyclable packaging for nearly all orders within five years

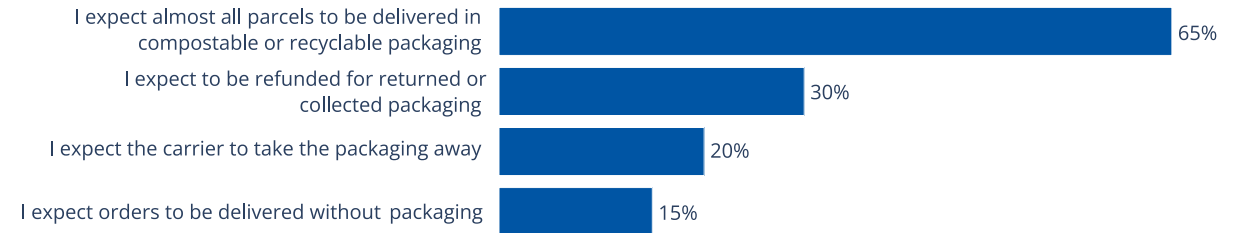
Looking to the next five years, nearly two-thirds (65%) of consumers expect almost all parcels to be delivered in compostable or recyclable packaging. This is encouraging news since PPWR will make this a legal requirement in the EU by 2030.

Three in ten (30%) expect to be refunded for returned or collected packaging (vs 21% in 2025) and 20% expect the carrier to take the packaging away (vs 14% in 2025).

Nearly three-quarters (72%) of UK consumers expect almost all parcels to be delivered in compostable or recyclable packaging. Meanwhile, nearly half (48%) of Turkish consumers expect to be refunded for returned or collected packaging, more than twice that of UK and French consumers (21% and 22% respectively).

By generation (chart not featured), seven in ten Boomers (72%) expect parcels to be delivered in compostable or recyclable packaging, compared to six in ten Millennials (61%) and Generation Z (60%). More than a third of Millennials (36%) and Generation Z (35%) expect to be refunded for returned or collected packaging (vs 25% last year), twice that of Boomers (18%).

Expectations for packaging over the next five years

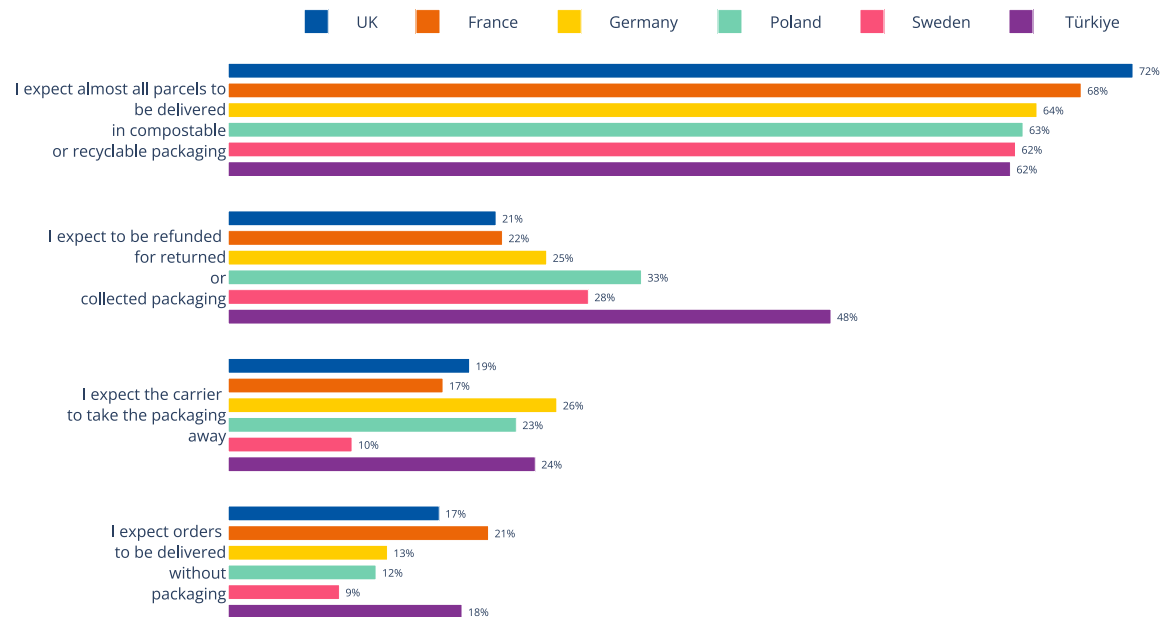


Question: 'How do you see online shopping packaging evolving in the next five years?'

Source: RetailX

RetailX 2026
RXS230WP-CX-13-v8

Expectations for packaging over the next five years, by country



Question: 'How do you see online shopping packaging evolving in the next five years?'

Source: RetailX

RetailX 2026
RXS230WP-CX-100-v6

Eight in ten shoppers say retailers should do more to reduce packaging waste

As evidenced earlier in the report, consumers across the countries surveyed are concerned by packaging waste, with excess internal and external packaging putting them off buying again (page 23) and a desire for easier-to-recycle packaging (page 29). They have also noticed retailers' efforts to improve the sustainability of their eCommerce packaging (page 26).

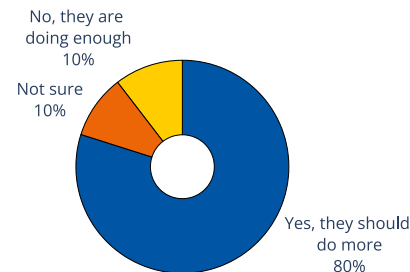
Yet, despite the efforts already made, eight in ten consumers (80%) think that, going forward, retailers should do more to minimise packaging waste (vs 68% in 2025).

At only one in ten (10%), the proportion of consumers who feel retailers are doing enough has fallen (18% in 2025).

The sentiment is fairly consistent across both countries and generations. Consumers in France (86%), Türkiye (85%) and the UK (82%) feel the strongest that retailers should be doing more, compared to 72% in Sweden.

By generation, older consumers feel more strongly, with 85% of Boomers and 83% of Generation X believing that retailers could do more, compared to 72% of Generation Z.

Consumer views on whether retailers should do more to minimise packaging waste

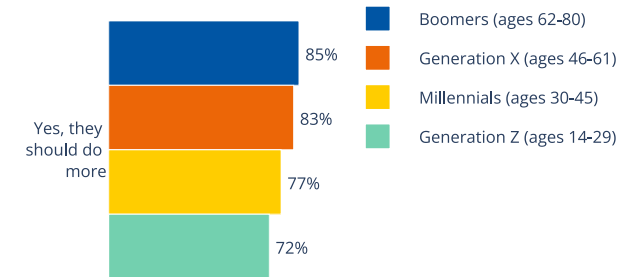


Percentages may not total 100 due to rounding. Question: 'Thinking about retailers' and brands' sustainability efforts should they do more to minimise eCommerce packaging waste?'

Source: RetailX

RetailX 2026
RXS230WP-CX-36-v20

Consumers who think retailers should do more to minimise packaging waste, by generation

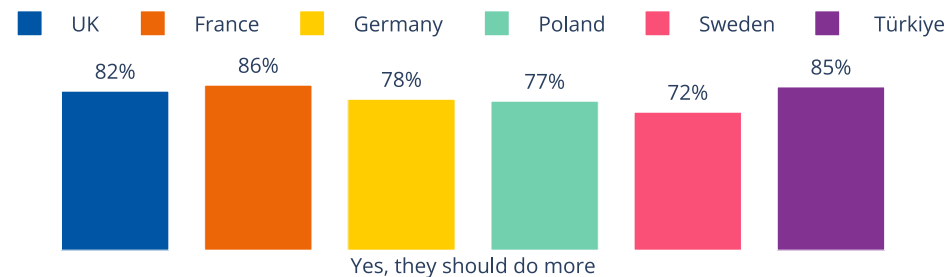


Question: 'Thinking about retailers' and brands' sustainability efforts should they do more to minimise eCommerce packaging waste?'

Source: RetailX

RetailX 2026
RXS230WP-CX-36-v9

Consumers who think retailers should do more to minimise packaging waste, by country



Question: 'Thinking about retailers' and brands' sustainability efforts should they do more to minimise eCommerce packaging waste?'

Source: RetailX

RetailX 2026

One in five don't trust that packaging is becoming more sustainable

With retailers and brands focusing on improving packaging sustainability and the majority of customers feeling that companies need to do more to reduce packaging waste, the question of trust around sustainability claims arises. Greenwashing can seriously damage a brand's reputation, so retailers must be able to support and evidence their sustainability claims with valid data.

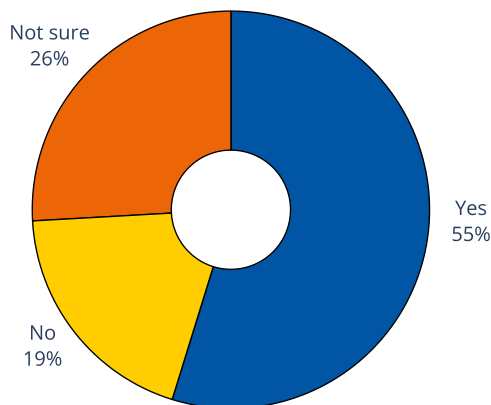
More than half (55%) say they trust retailers when they talk about becoming more sustainable overall. An almost identical amount (54%) say they trust retailers when they claim to be making their eCommerce packaging more sustainable.

However, this leaves around one in five who don't trust such claims, whether it's general sustainability (19%) or packaging sustainability (20%), and around a quarter who aren't sure.

By country (chart not featured), only around half of consumers are confident that retailers are making their packaging more sustainable in the UK, Germany, Poland, Sweden and Türkiye. However, this rises to six in ten (61%) of consumers in France.

In the generational split (chart not featured), around half of all age groups are confident that retailers are doing enough, though sentiment is slightly stronger among Millennials.

Consumer trust in general sustainability claims

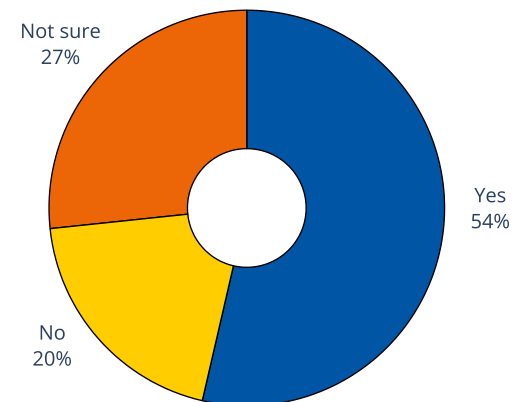


Percentages may not total 100 due to rounding. Question: 'Thinking about retailers' and brands' sustainability efforts I trust them when they talk about becoming more sustainable overall'

Source: RetailX

RetailX 2026
RXS230WP-CX-37-v15

Consumer trust in packaging sustainability claims



Percentages may not total 100 due to rounding. Question: 'Thinking about retailers' and brands' sustainability efforts I trust them when they say they are making their packaging more sustainable'

Source: RetailX

RetailX 2026
RXS230WP-CX-38-v15

Three-quarters of consumers say unique packaging improves brand perception

Positive brand perception is vital and packaging can help. This question shows that packaging that is recyclable, sustainable, appropriately-sized and cleverly-engineered for the product type best impresses customers. Strength of feeling is strongest for recyclable and appropriately-sized packaging, with more than half (54% and 51%, respectively) feeling strongly.

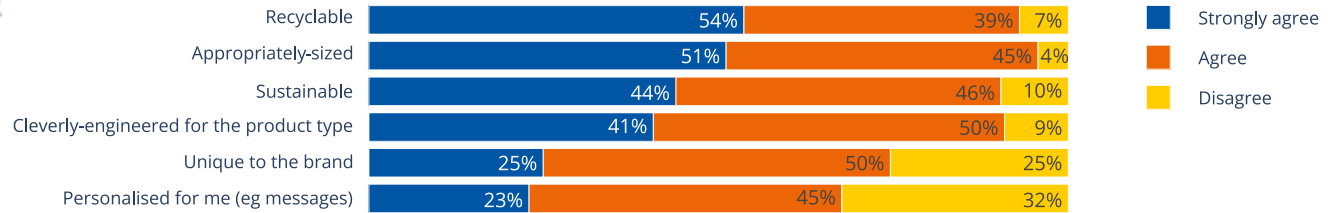
But uniqueness is also important. 75% of consumers believe eCommerce packaging that is unique to the brand helps improve the perception of that brand, with 25% strongly agreeing.

One way of providing a unique experience is through personalisation. More than two-thirds (68%) of consumers are impressed by this, with 23% feeling strongly.

Turkish consumers are most likely to be impressed by personalisation (86%), followed by Swedish (80%). By contrast, less than half (48%) of Germans say it improves brand perception.

Generation Z are most impressed by personalised messaging, again reflecting their love for unboxing. 83% of Generation Z agree, with 36% feeling strongly. This compares to 50% of Boomers, with only 12% feeling strongly.

Packaging factors that consumers say improve brand perception

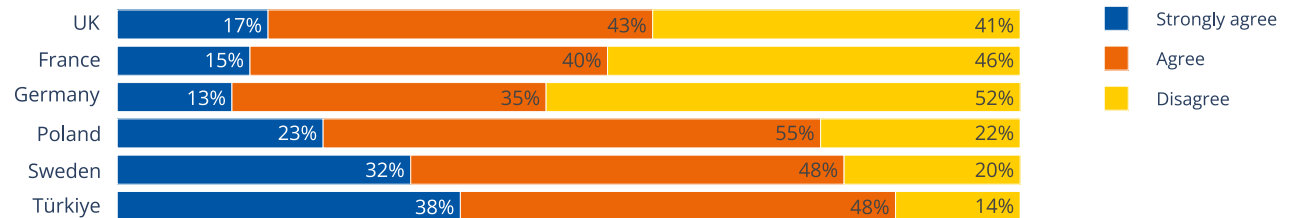


Percentages may not total 100 due to rounding. Question: 'My opinion of a brand improves when its parcel's packaging is:'

Source: RetailX

RetailX 2026
RXS230WP-CX-16-v6

How packaging personalisation improves brand perception, by country

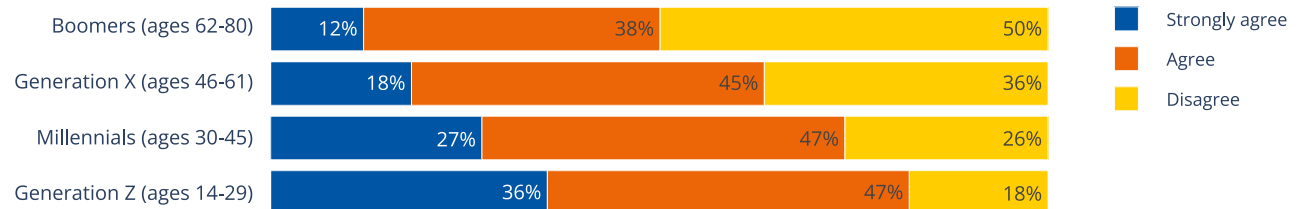


Percentages may not total 100 due to rounding. Question: 'My opinion of a brand improves when its parcel's packaging is personalised for me'

Source: RetailX

RetailX 2026
RXS230WP-CX-53-v6

How packaging personalisation improves brand perception, by generation



Percentages may not total 100 due to rounding. Question: 'My opinion of a brand improves when its parcel's packaging is personalised for me'

Source: RetailX

RetailX 2026
RXS230WP-CX-53-v5

More than two-thirds want to see messaging that packaging is 100% recyclable

Earlier, the report illustrated the importance of print on packaging for customers, which puts this high on the innovation list for retailers and brands. In the unboxing section, nearly a quarter said that print messaging—whether for information, personalisation or other uses—makes them more likely to buy again.

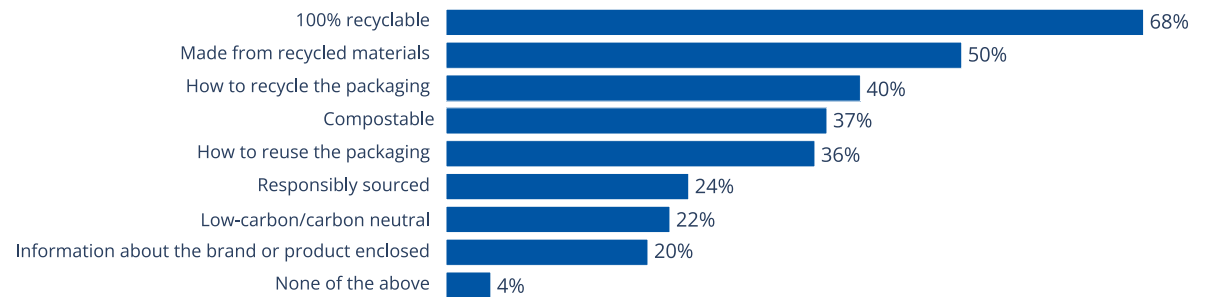
Sustainability messaging tops what consumers want to see, with more than two-thirds (68%) wanting messaging which informs them that the eCommerce packaging is 100% recyclable. Half (50%) want to see that it's made from recycled materials and 40% want instructions on how to recycle the packaging.

Messaging printed on the packaging that includes information about the product or brand enclosed in the parcel is appealing to one in five (20%).

UK consumers find the top three messages of 100% recyclable, made from recycled materials or how to recycle the packaging, most appealing of all countries surveyed, at 73%, 54% and 47%.

Boomers most want to see these top sustainability messages on their eCommerce packaging. Nearly three-quarters (73%) of Boomers find messaging that says packaging is 100% recyclable appealing, 55% want to see it's made from recycled materials and 47% want details about how to recycle packaging. This compares to 62%, 45% and 38% of Generation Z consumers.

Messages consumers want to see printed on eCommerce packaging

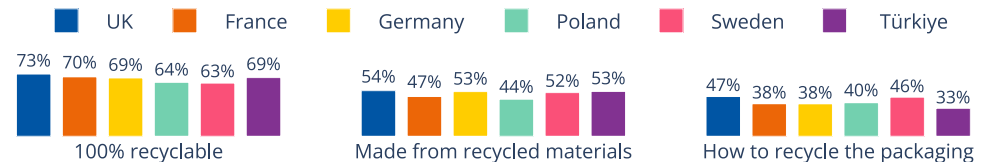


Question: 'Which statements, when written on the eCommerce packaging itself, would you find appealing?'

Source: RetailX

RetailX 2026
RXS230WP-CX-15-v4

Top 3 messages consumers want to see printed on eCommerce packaging, by country

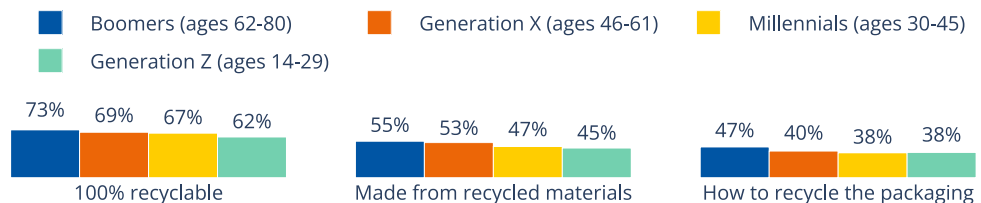


Question: 'Which statements, when written on the eCommerce packaging itself, would you find appealing?'

Source: RetailX

RetailX 2026
RXS230WP-CX-101-v3

Top 3 messages consumers want to see printed on eCommerce packaging, by generation



Question: 'Which statements, when written on the eCommerce packaging itself, would you find appealing?'

Source: RetailX

RetailX 2026
RXS230WP-CX-101-v2

**Expert views
on eCommerce
innovation and
automation**



Innovation takes centre stage in Mondi's packaging design approach



"Those that realise its value think about their packaging requirements at the point that they invest in fulfilment infrastructure, automation and logistics."

Gavin Mounce, Innovation & Application Director, Mondi eCommerce

At Mondi Group, packaging innovation is about delivering channel-targeted, data-backed, fully-tested solutions designed for the specific needs of eCommerce shoppers and online retailers.

It's not only shopper expectations that are evolving rapidly. As eCommerce continues to be reshaped by changing delivery models, automation, sustainability regulations such as the imminent Packaging and Packaging Waste Regulation (PPWR) and Extended Producer Responsibility (EPR) and cost pressures, suppliers such as Mondi Group must keep pace. "Continuous innovation is critical to keep our product portfolio relevant, competitive, leading and aligned with market trends," says Gavin Mounce, Mondi eCommerce Innovation & Application Director.



More than just a box

Mondi's approach moves beyond an individual product focus to complete end-to-end packaging and paper solutions. These are designed specifically to fit the needs of eCommerce and last-mile delivery, and optimised for every supply chain touchpoint rather than simply adapted from traditional retail.

Channel-specific solutions have moved eCommerce packaging far beyond just corrugated boxes—long the default choice for online retailers. The range now includes coated and functional papers,

padded mailers and right-sizing concepts and is designed for manual, semi-automated or fully automated packaging systems.

The range also includes award-winning new solutions, such as Mondi's Protective Mailer. The innovative padded mailer is fully paper-based and was designed as a sustainable alternative to plastic bubble padded mailers. Launched in 2024, the Protective Mailer was recognised with multiple awards in 2025 and received a WorldStar Packaging award in the eCommerce category in January 2026 from the World Packaging Organisation.

Working with eCommerce partners to innovate

Such developments rely on understanding both shopper and retailer needs. Here, Mondi Group's annual survey of shopper sentiment is a crucial barometer of end-customer expectations. To act on these insights, Mondi's dedicated eCommerce Division also includes a team focused solely on innovation, as well as ThinkBox, a testing facility and innovation hub.

The division works closely with its eCommerce partners to understand what they need, considering their high volumes, fast-paced environment and the sustainability challenges they face—and that's all on top of the basic need for packaging that protects.

"By collaborating closely with our customers, rather than acting as a transactional supplier, we can anticipate future innovation needs, address emerging operational challenges, and deliver solutions that improve damage reduction, logistics efficiency, material optimisation and regulatory compliance," says Mounce.

Data-driven design and testing

Successful collaborations rely on recognising the role of packaging at the heart of investment, backed by performance-driven, data-led design that challenges traditional assumptions around materials and pack formats.

"Those that realise its value think about their packaging requirements at the point that they invest in fulfilment infrastructure, automation and logistics," says Mounce.

Packaging innovation isn't just a theoretical exercise, new products need to be thoroughly tested. Emerging technologies, including advances in sensor technology and connected packaging, allow for precise measurement of real-world conditions, such as impacts, vibration, temperature and humidity, that help to

inform whether packaging is fit for purpose and logistics-friendly. Meanwhile, data analytics and AI allow for further optimisation and improvement.

Working in partnership with retailers within its ThinkBox hub, Mondi's ISTA-approved laboratory in Budweis, Czechia, is a crucial element of its innovation process. The laboratory is used to validate new solutions. It also informs further research and development by testing packaging performance across different transport, handling and fulfilment scenarios, further optimising protection and performance.

Built for automation needs

This includes developing packaging suitable for automated fulfilment environments. "There is a continuing trend for automation in fulfilment centres," says Mounce. However, while automation can focus on repeatable, low-touch tasks, he adds that tasks requiring human judgement, such as adding void fill, nesting, compressing or folding irregular items into small spaces, should remain manual. "Semi-automation is a good option for many retailers, enabling a hybrid approach where machines handle preparation and sealing, whilst humans manage complex packing solutions," he says.

The role of personalisation and digital printing

The connected packaging solutions mentioned earlier aren't just used for functionality, however. The use of digital tools such as QR codes, RFID and NFC on or in packaging can help to support track-and-trace, authentication and inventory accuracy, but they also enable direct digital interactions with consumers that can provide the wow factor many are looking for.

Dynamic content through these advances in connected packaging and digital printing can replace the wastefulness of printed inserts and inform customers about usage instructions, return options or

information about sustainability. It can also allow for personalisation and storytelling to better engage customers.

Personalised printing and messages can help further heighten the customer experience at what, in many instances, is the first physical interaction a customer has with a brand. And, as the survey shows yet again, that drives repeat purchases and customer advocacy, making packaging's role and Mondi's focus on innovation central to a brand's success.



The compact revolution: Why agility is the new scale in the future of eCommerce fulfilment



“Automation is now the most practical way to meet sustainability targets.”

Francesco Cecci, Cluster Sales Manager eCommerce, Coesia.

Retailers are now focusing on high-density agility and brownfield-ready solutions in their race to automation, says Francesco Cecci, Cluster Sales Manager eCommerce at Coesia.

At Coesia, we are seeing a clear shift in how retailers approach automation. The era of rigid, massive infrastructure is being replaced by a demand for high-density agility. As eCommerce matures across Europe, the goal is no longer just “speed at any cost”, but rather creating a predictable, scalable flow that fits within existing warehouse footprints.

The rise of plug-and-play packing

The biggest behavioural change we’ve noticed is a move toward “brownfield-ready” solutions. Retailers can’t afford the downtime required for large-scale construction. They need systems that can be integrated into a live environment overnight. This demand was the primary drive for us to develop Selecta, our new automation solution launched at LogiMAT in March 2026. Selecta automates the selection, opening, sealing and labelling of pre-made paper bags.

A key differentiator is its compact 4.3 sq mt footprint, which enables high-level automation in spaces previously restricted to manual operations. Designed to drop directly into the space of a traditional manual packing bench, Selecta allows retailers to more than double their throughput within their existing floor plan. This modular approach provides the scalability needed to handle peak seasons without the typical reliance on a massive increase in manual labour.

Efficiency as a sustainability lever

Automation is now the most practical way to meet sustainability targets. Manual packing often leads to oversized boxes and excessive filler. By automating the bagging process with Selecta, we ensure every product is matched to the smallest possible paper mailer. This precision doesn’t just save material; it increases transport density. Smaller packages mean more orders per delivery van, directly reducing the carbon footprint of the last mile.

The road ahead

Looking ahead, we see automation evolving from a standalone tool into a fully integrated, bidirectional ecosystem. Over the next three years, modular, high-speed units like Selecta will become the baseline requirement for any high growth fulfilment centre looking to remain competitive.

By the five-year mark, we expect the rise of software-defined fulfilment, where packaging machinery communicates directly with carrier APIs to adjust formats based on real-time vehicle capacity and logistics data.

Within a decade, this could mature into integrated lifecycle autonomy, where systems seamlessly process both outbound orders and inbound returns within a circular loop, scaling dynamically to handle global supply chain fluctuations while maintaining a permanent focus on zero-waste, self-sustaining warehouse ecosystems.

Reconsidering the all-or-nothing myth

The most common misconception is that automation is an all-or-nothing investment. In reality, the future of the warehouse is a hybrid one. By starting with compact, high-impact stations, retailers can automate their most repetitive tasks first and scale their investment as they grow. Efficiency in 2026 isn’t about the size of the machine; it’s about the intelligence of the footprint.



How automation is shaping the future of eCommerce fulfilment and warehouses



“True packaging innovation lies in how intelligently the packaging is created and integrated into fulfilment operations.”

Francesco Ponti, CEO, CMC Packaging Automation.

To deliver true innovation in packaging requires integration from the start of the packing process, says Francesco Ponti, CEO of CMC Packaging Automation

Packaging innovation is often associated with new materials or alternative substrates. As a strong advocate of box last technology, however, we believe the most significant transformation is taking place within the packing process itself.

Automation is redefining packaging as an integrated, data-driven function inside the warehouse. When packaging systems are connected directly to WMS and real-time scan, they can

create right-sized parcels, adapting dynamically to each individual shipment. This fundamentally improves flow, consistency, and decision-making across fulfilment operations.

Highly integrated solutions such as CMC Genesys with Vary-Tote represent a new level of process integration. By combining automated order consolidation, dynamic box creation and intelligent material handling, the system enables production in which orders are automatically grouped, sequenced and packed into right-sized parcels with minimal or zero touch operator intervention. Retailers implementing this type of solution are increasingly restructuring their fulfilment layouts around packaging automation rather than treating packaging as the final step.

The critical need for flexibility

At the same time, flexibility has become critical. The CMC Super Vertical BOX, with its compact footprint of approximately 10 sq mt, demonstrates how automation can adapt to brownfield environments where space constraints are a primary challenge. This kind of solution allows existing facilities to introduce right-sized automation within limited space, supporting incremental transformation rather than full-site replacement.

As a result, we have observed behavioural shifts among eCommerce retailers. There is greater emphasis on reducing the number of operating touches during the packaging process, which is increasingly viewed as a strategic control point for cost, customer experience and environmental performance.

From an operational perspective, the benefits are tangible. These include speed and consistency, allowing automated systems to maintain a stable throughput even during seasonal peaks; accuracy, with integrated scanning and validation to reduce packing errors and returns; labour efficiency, with the reduction of repetitive

manual boxing tasks that allow teams to focus on supervision, quality control, and exception handling and scalability which means that growth in order volume doesn't require proportional increases in labour, improving resilience in tight labour markets.

Sustainability and process innovation

Sustainability improvements are directly linked to process innovation. Right-sized, box-last packaging significantly reduces corrugated consumption and eliminates plastic void fill. Smaller parcel dimensions improve truck density and transport and warehouse efficiency. On-demand box production also supports readiness for regulatory frameworks such as the EU Packaging and Packaging Waste Regulation (PPWR) by minimising material use, improving recyclability, and enabling better tracking of packaging data.

Considered use of packaging is the real definition of innovation, according to CMC Packaging Automation CEO Francesco Ponti. “True packaging innovation lies in how intelligently the packaging is created and integrated into fulfilment operations,” he says. “Automation enables companies to improve efficiency and environmental performance at the same time.”

The future of automation

Looking ahead, over the next three years, we expect broader adoption of modular and scalable automation, particularly solutions that integrate seamlessly into existing facilities. Within five to ten years, fulfilment centres are likely to operate as highly connected ecosystems where packaging, picking and shipping are synchronised through predictive analytics and robotics.

At CMC, we are convinced that packaging automation is less about a single machine and more about creating solutions backed by R&D and supported by a clear understanding of what leading paper and cardboard packaging companies, such as Mondi, bring to the table.

The rise of intelligent rightsizing packaging systems



“The holistic improvements unlocked by intelligent rightsizing impact one of the most important metrics used to judge packaging performance.”

Bryan Boatner, Chief Revenue Officer, Ranpak.

The growth of intelligent rightsizing systems delivers a broad range of benefits for retailers, including redefining the approach of fulfilment centres to both efficiency and sustainability, says Bryan Boatner, Chief Revenue Officer at Ranpak.

As logistics automation has matured, it has become clear that end-of-line packaging is not a secondary priority but a core driver of operational performance. Upstream investments in sophisticated picking and sorting often reveal their limits when packaging becomes the choke point. With rising throughput demands, labour shortages, sustainability pressures, and expanding SKU diversity, packaging has emerged as one of the most complex and consequential functions in modern fulfilment.

The growth of rightsizing systems

One of the most significant shifts is the growth of rightsizing

systems, which cut material use, reduce labour needs, and lower dimensional (DIM) weight shipping costs while matching the pace of advanced AS/RS technologies. Enabled by better data, machine vision, and AI-driven diagnostics, these systems now maintain high uptime and feed actionable insights back into broader process optimisation.

Intelligent rightsizing also improves quality and accuracy. By linking automated box erectors with downstream height reduction equipment, warehouses can eliminate manual boxing steps and even replace tote-based workflows—allowing workers to pick directly into the final shipper box. The result is cleaner, more efficient packing, reduced waste, and faster payback timelines, often in a year or less.

Unlocking holistic improvements

The holistic improvements unlocked by intelligent rightsizing impact one of the most important metrics used to judge packaging performance. Total Landed Cost (TLC) refers to the sum of all costs incurred from manufacturing a product through its delivery until it reaches the point of revenue generation.

Intelligent rightsizing strategies stand out by delivering across several of the key areas where costs can accrue. These include using sustainable materials that are favoured by Extended Producer Responsibility regulations and managing DIM weight through volume reductions key to PPWR compliance in Europe, but also less obvious metrics such as warehousing costs, where consolidated box SKUs can make a difference.

A broader transformation

This rightsizing evolution signals a broader transformation in eCommerce operations. The convergence of physical AI, machine vision, and robotics is turning packaging from a fixed mechanical process into an adaptive, data-driven one.

Modular solutions, such as height reduction systems that support standardised box footprints, offer scalable entry points that simplify rather than complicate operations. By enabling one-touch packaging for mixed orders, they redefine how fulfilment centres approach both efficiency and sustainability.

