



Sustainability or Performance? Don't Compromise – You Can Have Both!



Kurt Richards, Director of Marketing

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Macro Trends

- Foodservice today
- The foodservice customer
 - Importance of food-to-go
 - Value rising (...value is not “price”)
 - Priorities & expectations
- Sustainability?
- Delivering BOTH

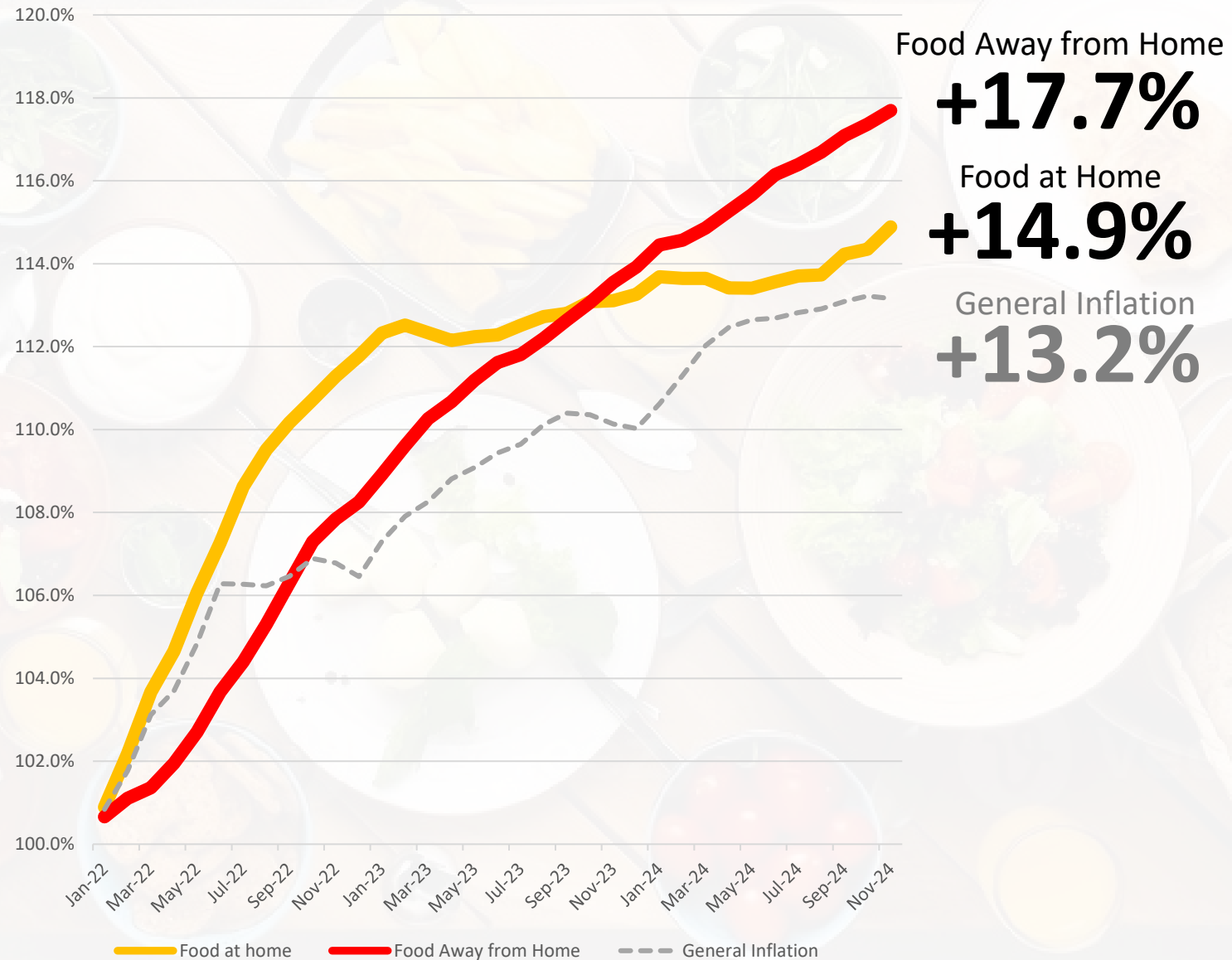




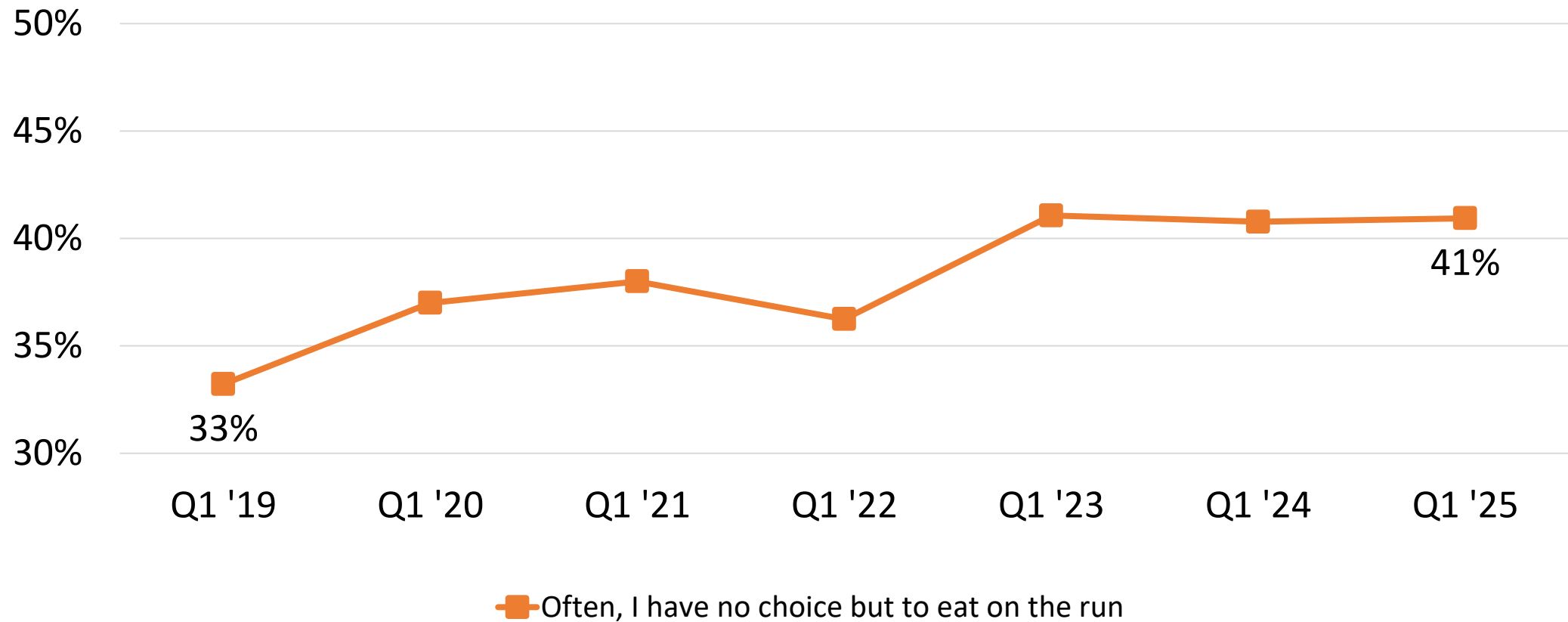
Shoppers reported that

79%

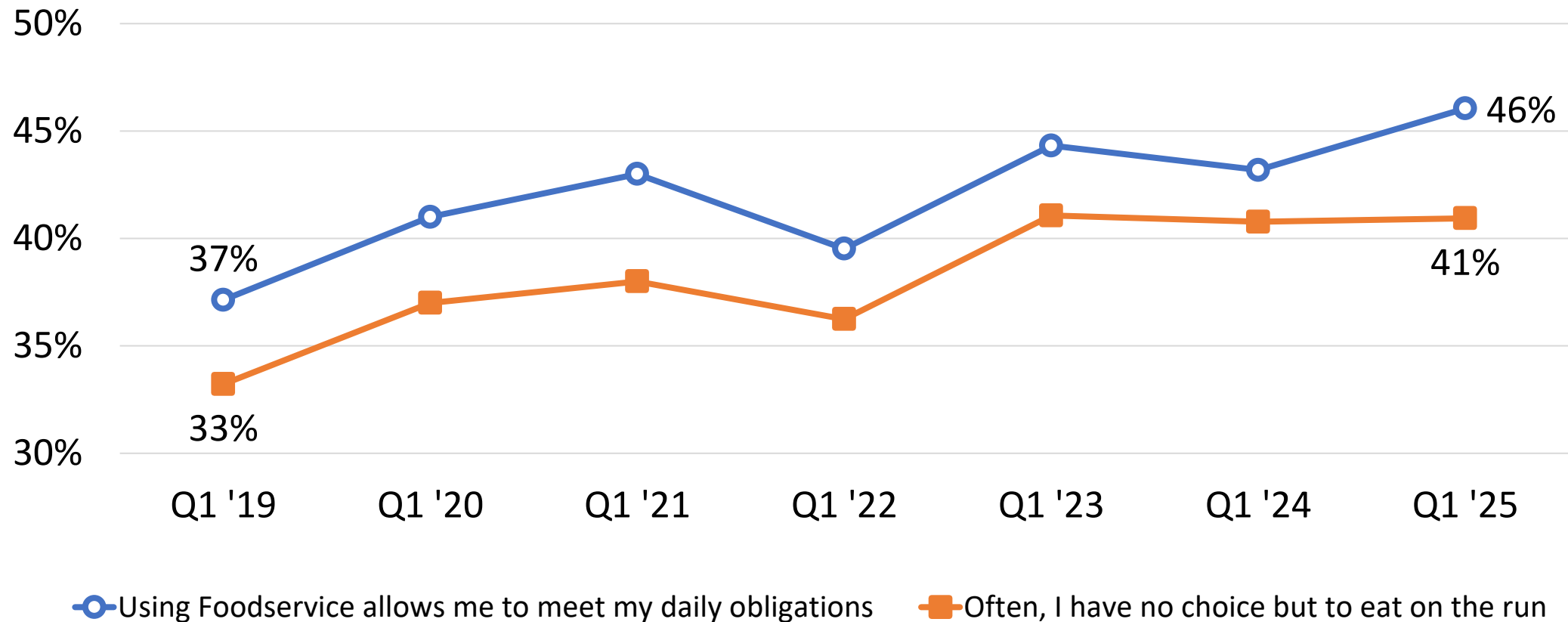
of their meals were
prepared at home



Consumers Feel Busier Than Ever



Consumers Feel Busier Than Ever



Source: Technomic Ignite Consumer

TO GO

SANDWICHES

SALADS

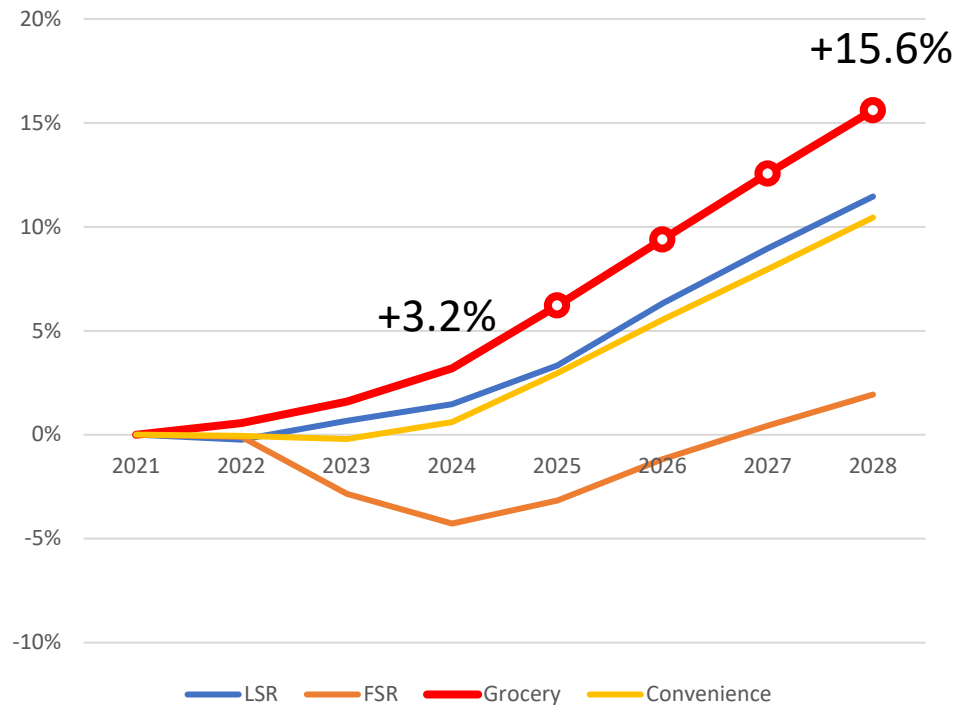
Rotisserie CHICKEN

fresh to GO

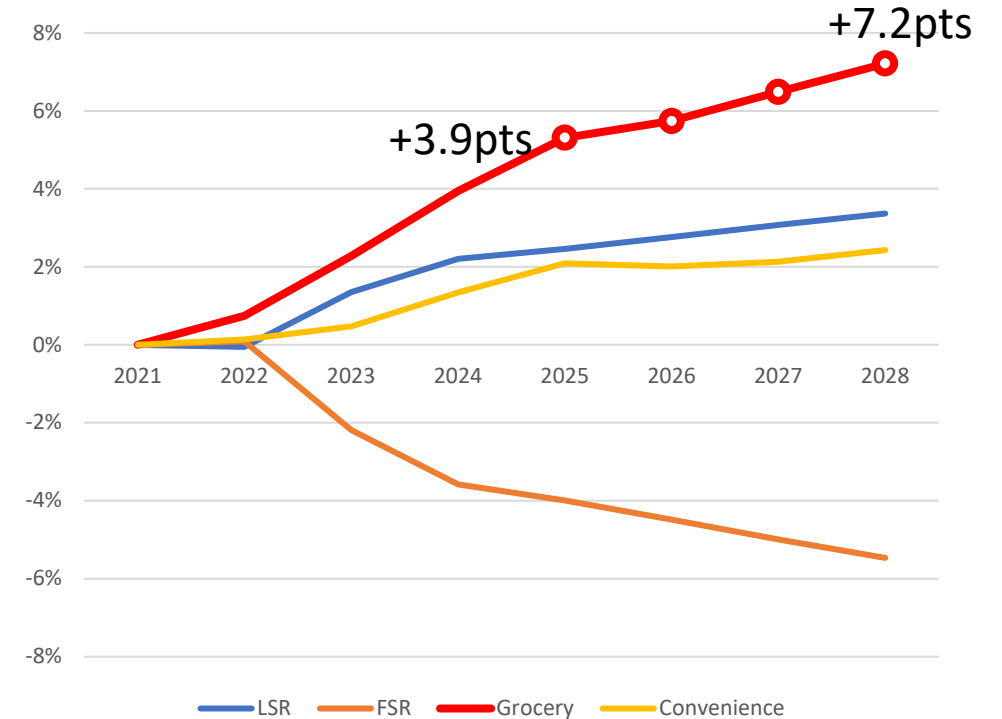


Prepared Foodservice Sales are Shifting to Grocery

Change in Prepared Foodservice Total \$ Sales



Change in Prepared Foodservice Share of \$ Sales



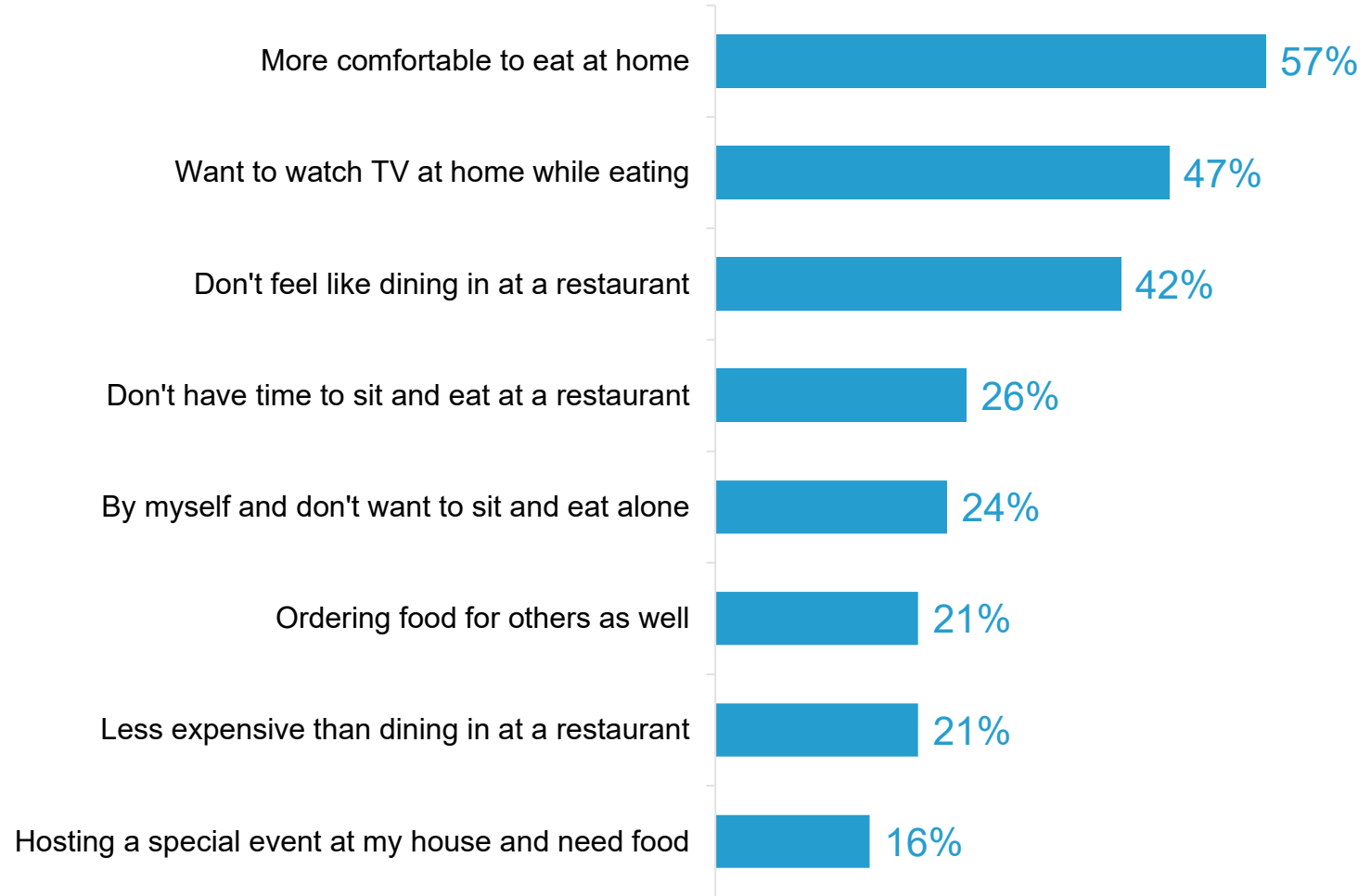
Want to Win More Meals?

Align with what is important to the prepared food customer



The top reasons why consumers opt for prepared food-to-go...

REASONS FOR ORDERING CARRYOUT OR DELIVERY RATHER THAN DINING IN**



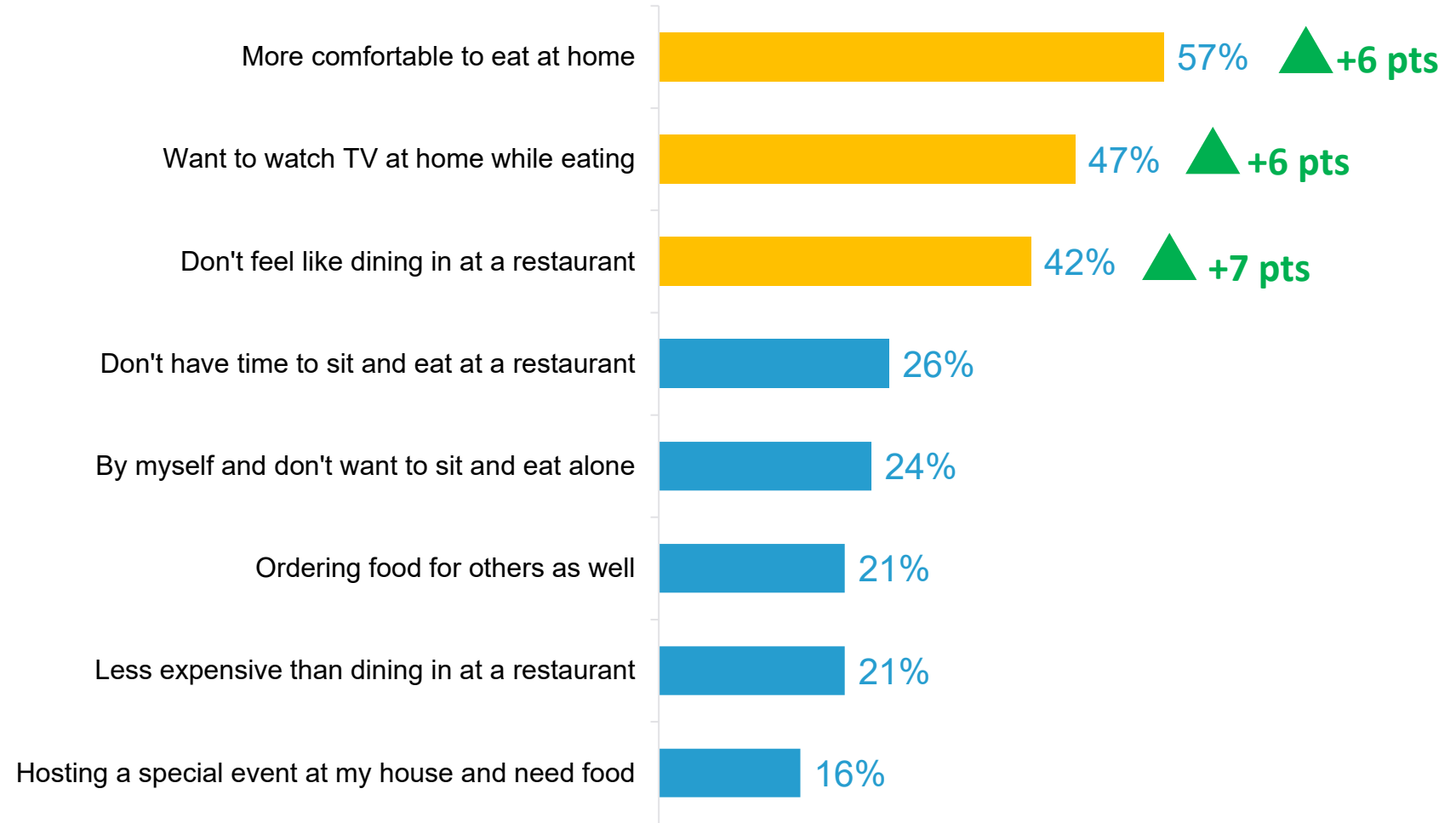
SOURCE: 2024 Technomic Delivery & Takeout Consumer Trend Report

**Base: 1,500 consumers who order carryout or delivery at least once a month

**Q: Thinking of the times you decide to order food for carryout or delivery rather than dine in at a restaurant or other foodservice location, why do you choose to order food for carryout or delivery rather than dine in? Select all that apply.

The top reasons why consumers opt for prepared food-to-go...

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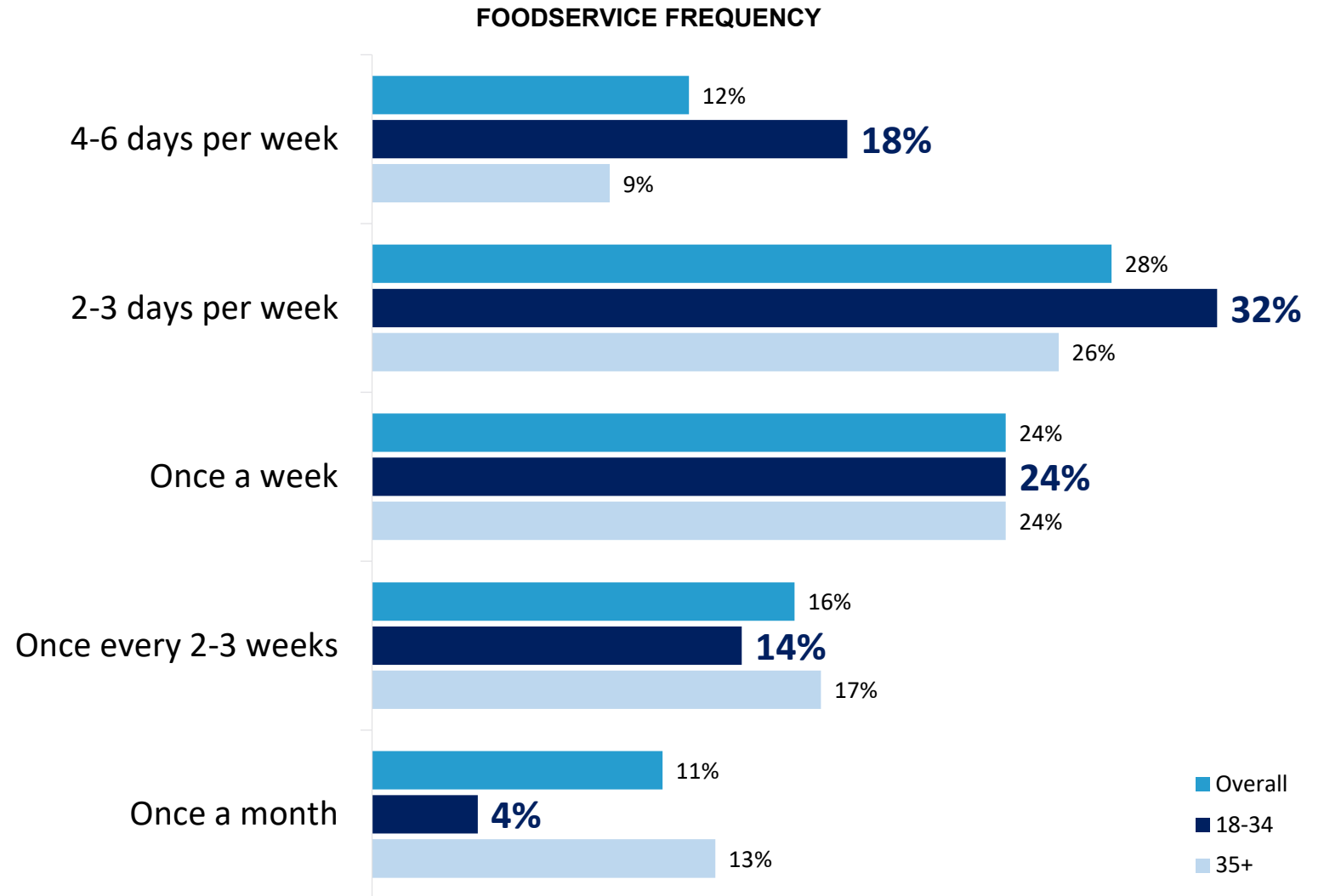


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This is driven by
a generational
consumer shift.



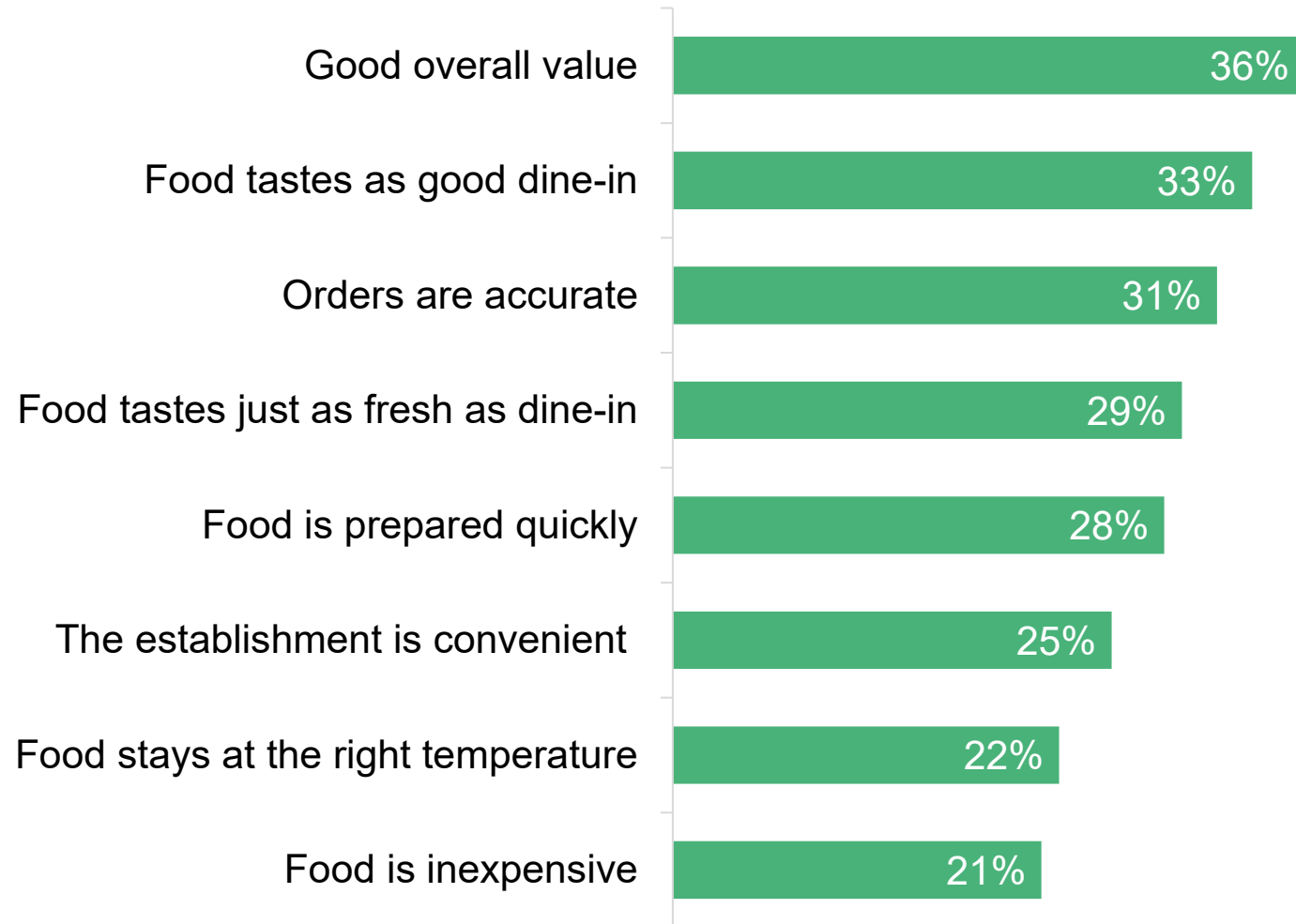
SOURCE: 2024 Technomic Delivery & Takeout Consumer Trend Report

Base: 1,500 consumers who order carryout or delivery at least once a month, including 445 consumers ages 18-34 and 1,055 consumers ages 35+Q: How often do you order food from a restaurant and either eat it at the restaurant, have it delivered or pick it up at the restaurant to eat it elsewhere?

How do consumers decide where to go?



TOP CONSIDERATIONS WHEN DECIDING WHERE TO GET FOOD TO GO*



SOURCE: 2024 Technomic Delivery & Takeout Consumer Trend Report

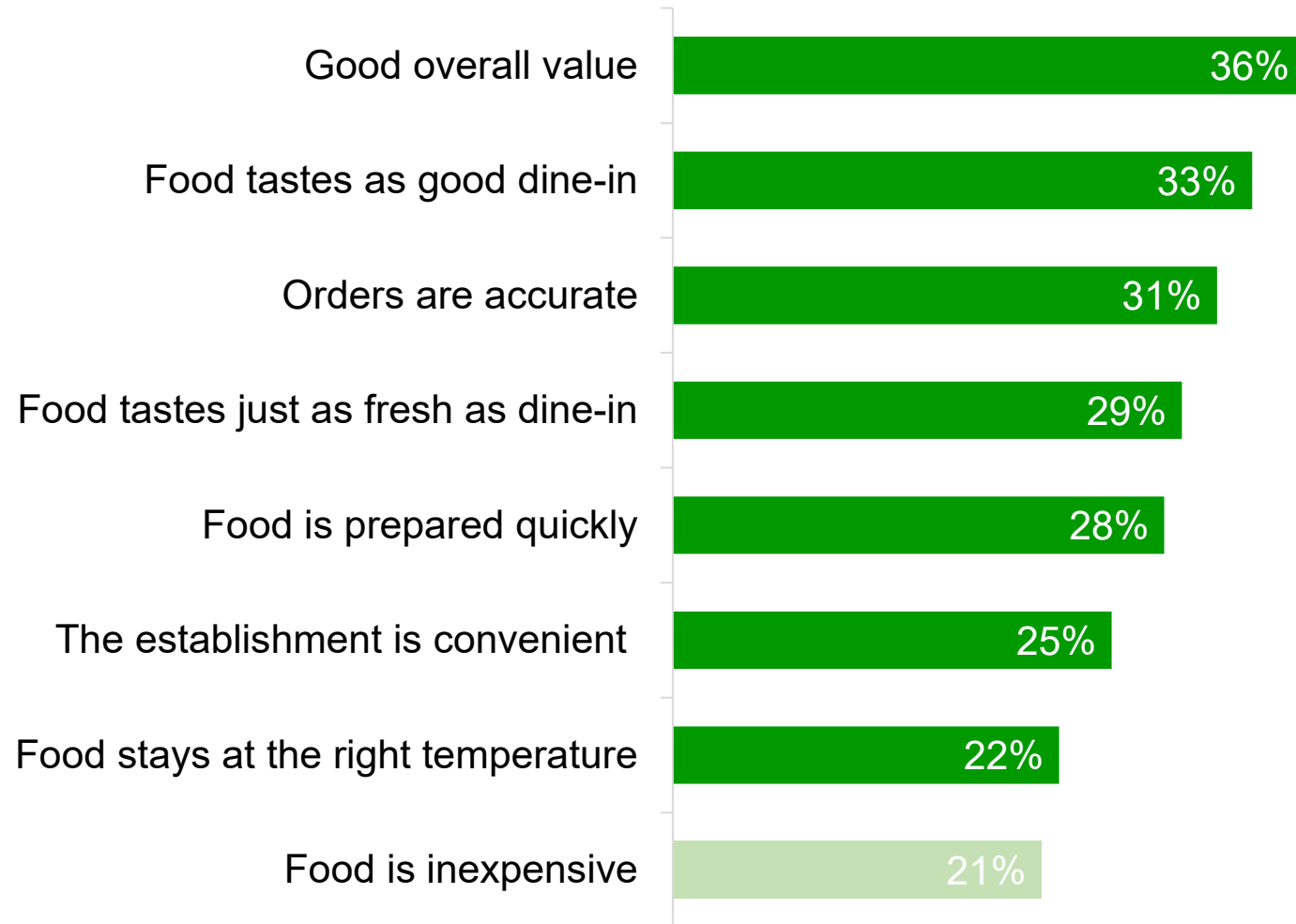
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What is “Value” for Foodservice ?

- **Quality** = make it taste fresh-made
- **Accuracy** = meet my higher expectations
- **Convenience** = make it quick, make it easy







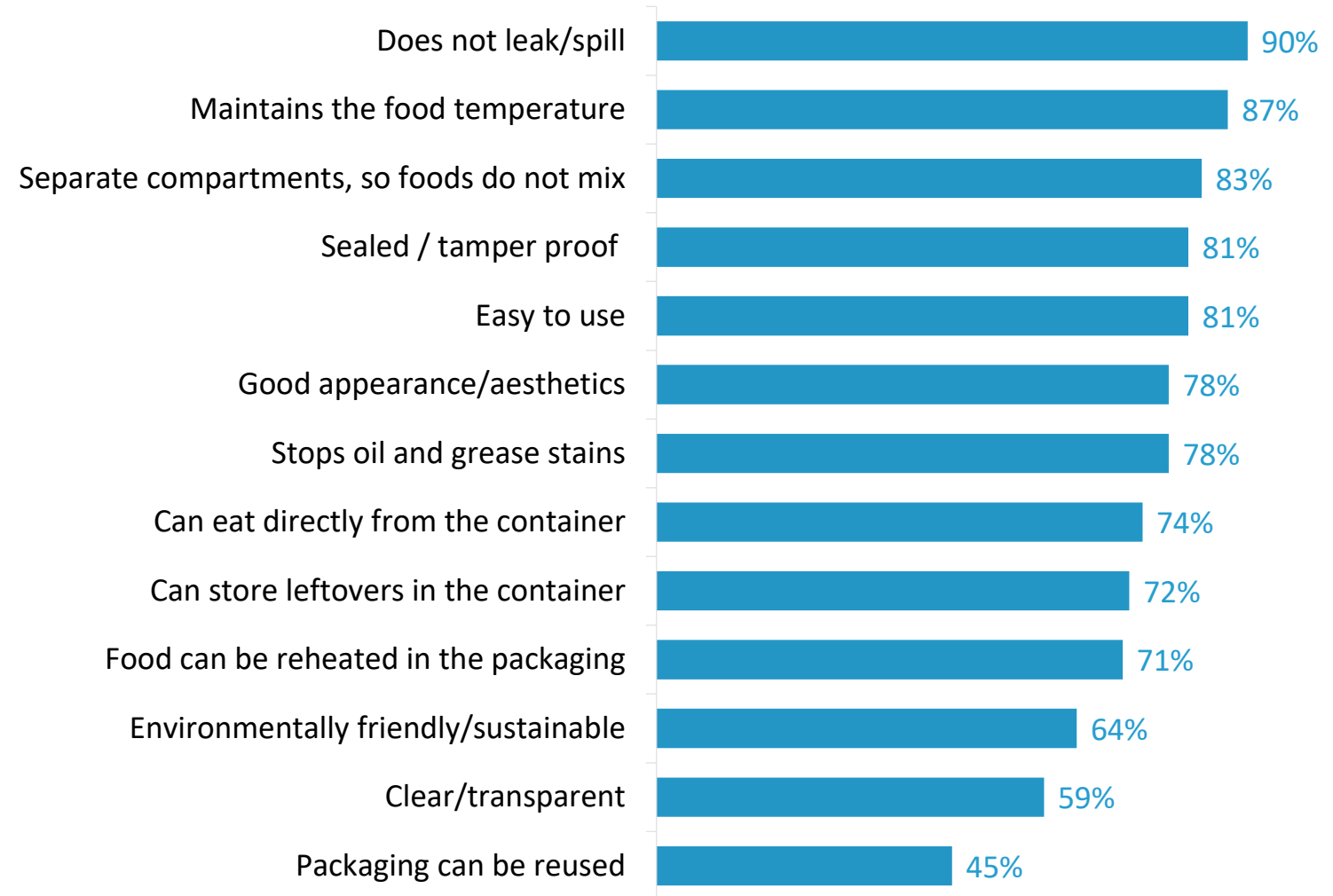
It's all about the FOOD.

Quality Wins.

Packaging makes a difference.

What do consumers expect from foodservice packaging?

PACKAGING ATTRIBUTE IMPORTANCE**
% SOMEWHAT IMPORTANT/IMPORTANT/EXTREMELY IMPORTANT



SOURCE: 2024 Technomic Delivery & Takeout Consumer Trend Report

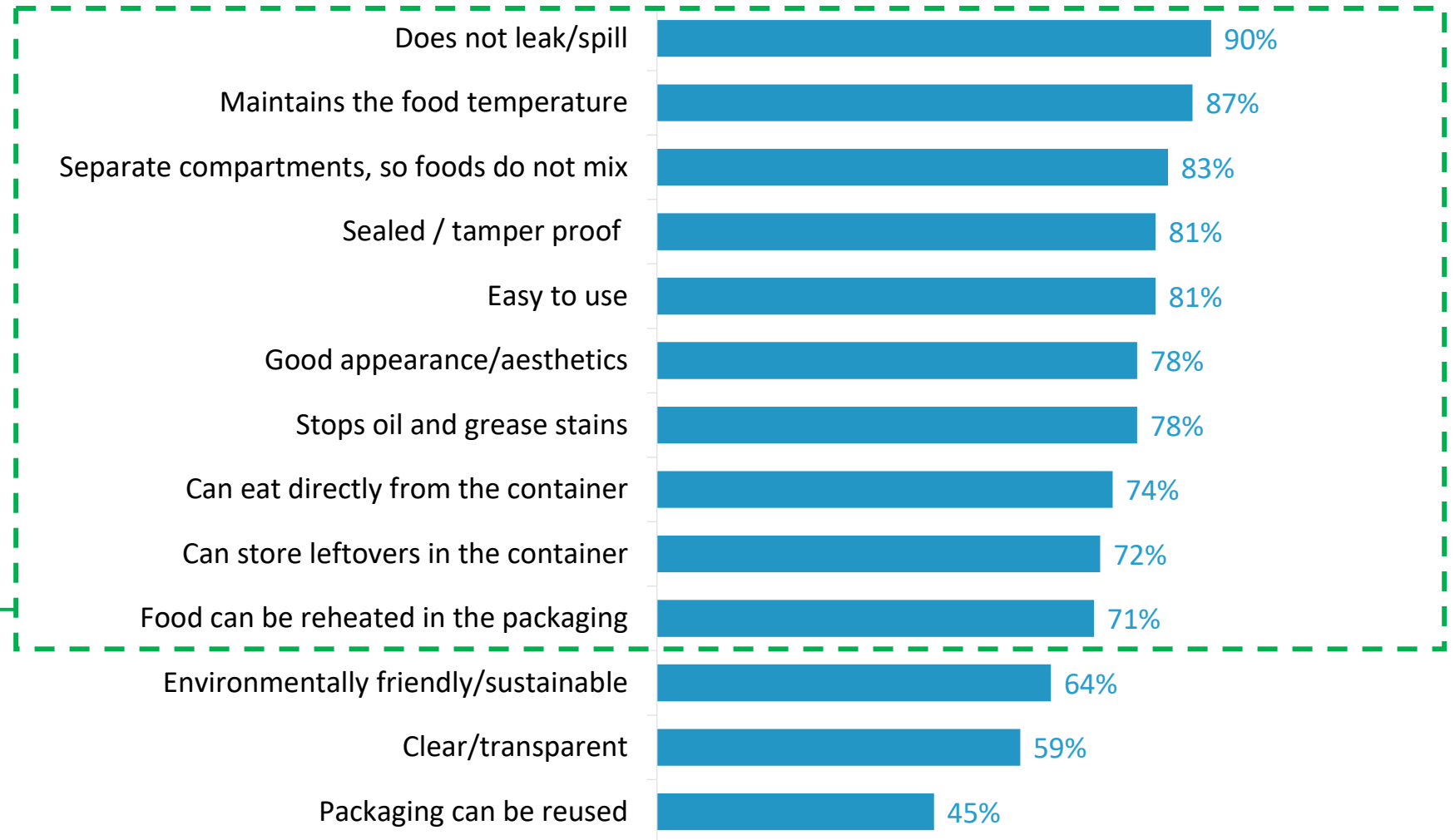
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What do consumers expect from foodservice packaging?

Performance

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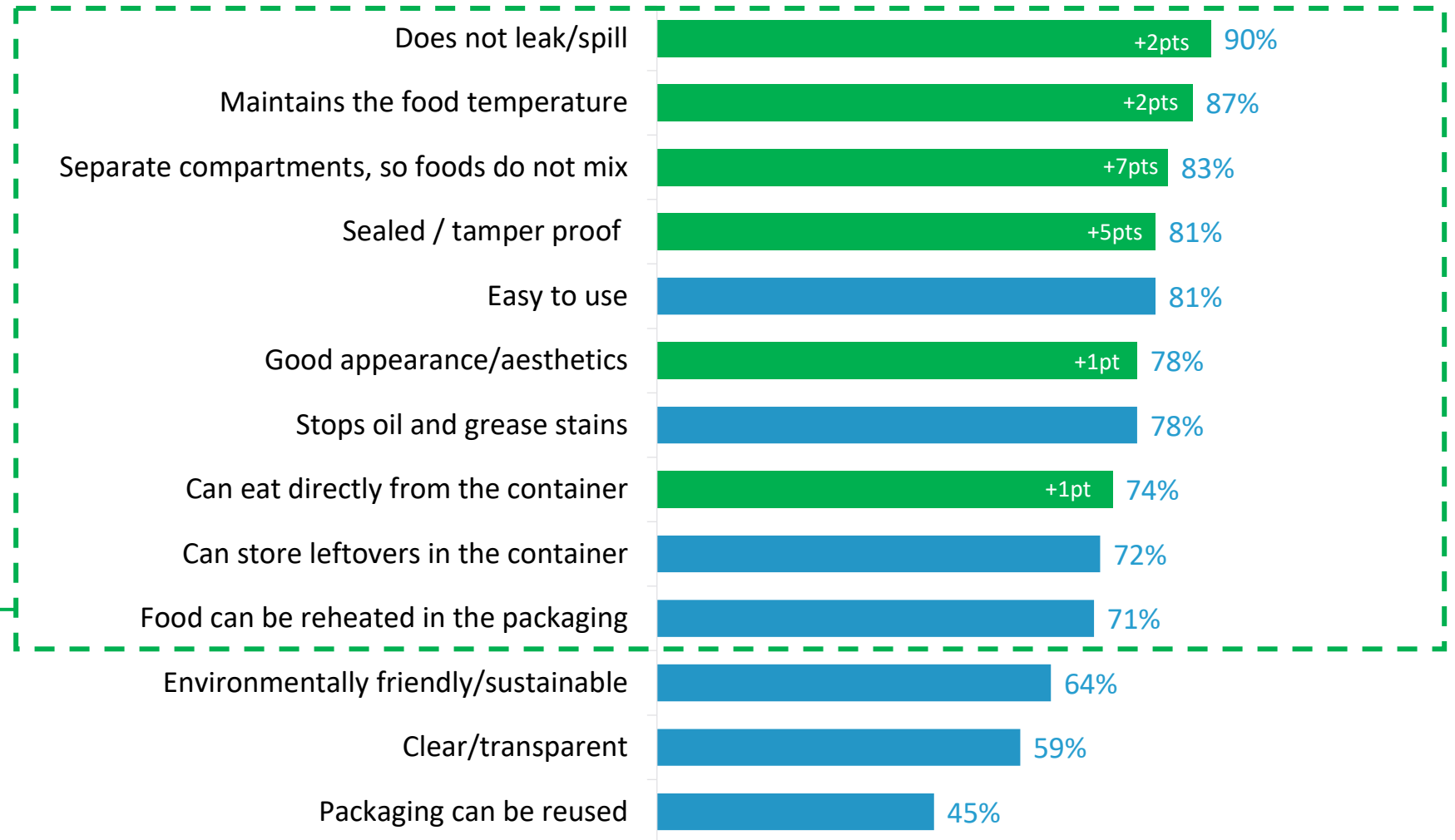
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Align with Top Consumer Priorities

Prevent Spills & Leaks, Protect Heat



Align with Top Consumer Priorities

Keep Food from Mixing, Offer Tamper-Security



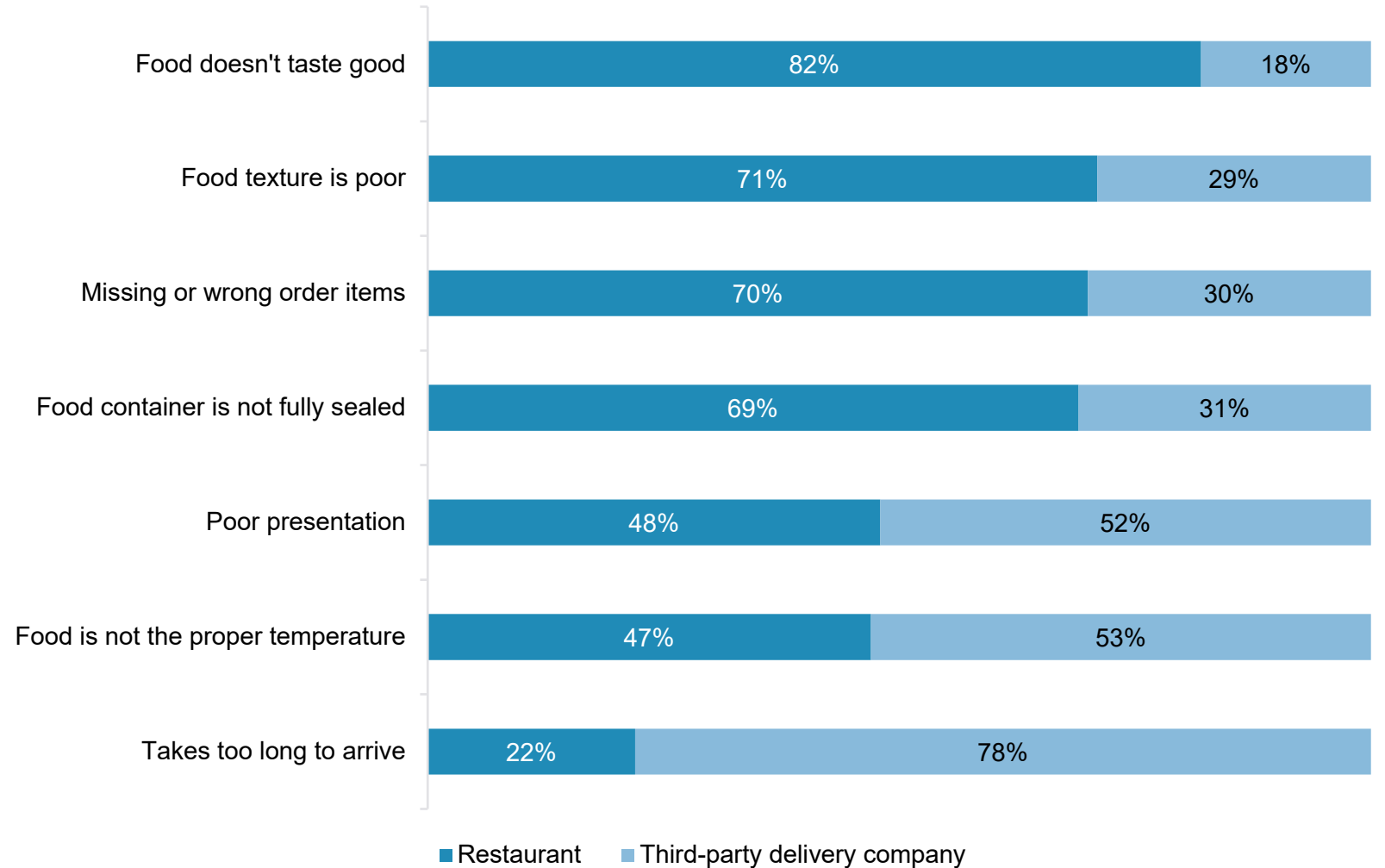
Align with Top Consumer Priorities

Protect Appealing Presentation



Who gets the Blame?

"IF THE FOLLOWING ISSUES ARISE WHEN ORDERING DELIVERY VIA THIRD-PARTY, I WOULD BLAME THE..."*



SOURCE: 2024 Technomic Delivery & Takeout Consumer Trend Report

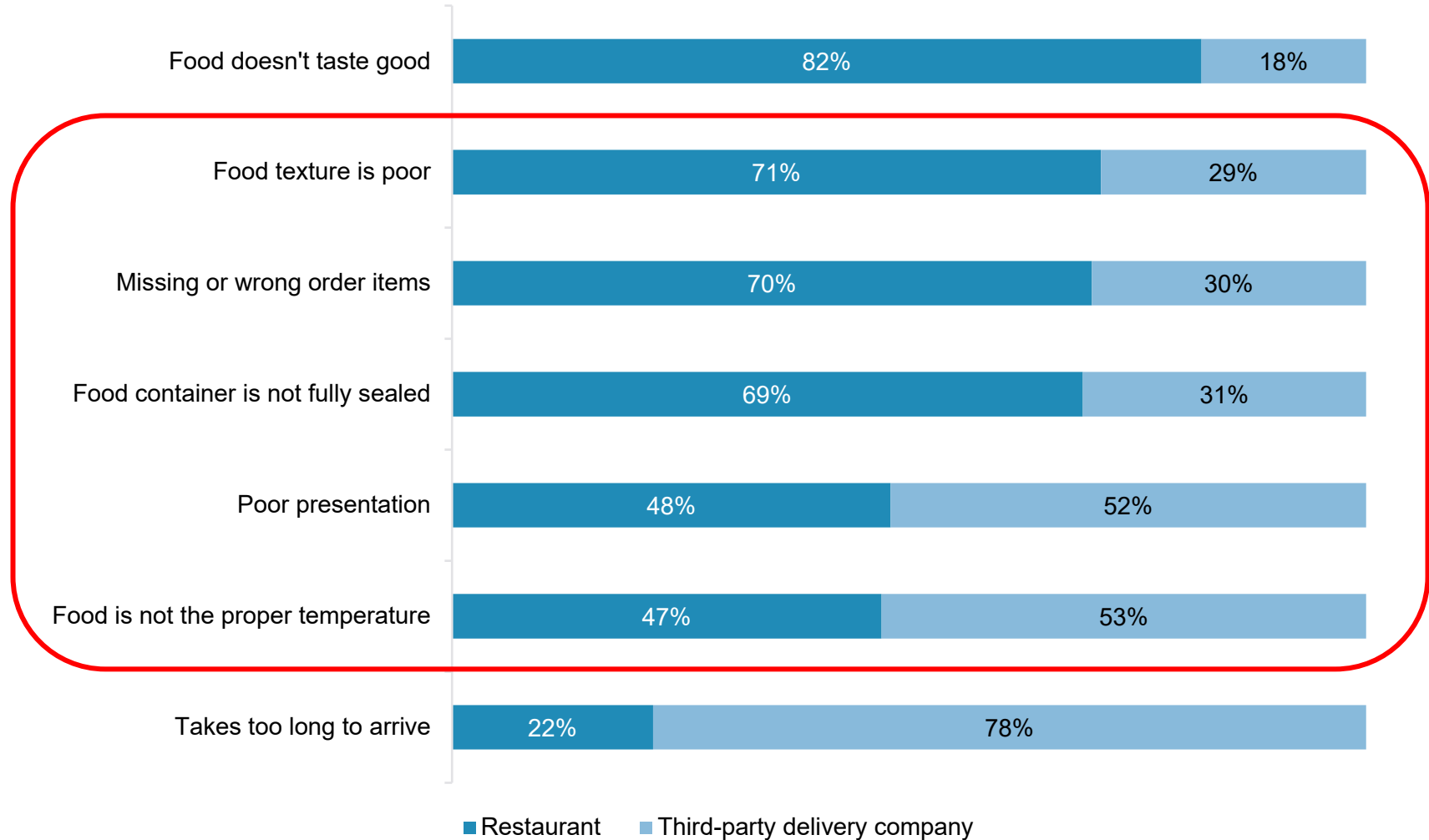
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Who gets the Blame?

These issues can be solved with higher-performing packaging.



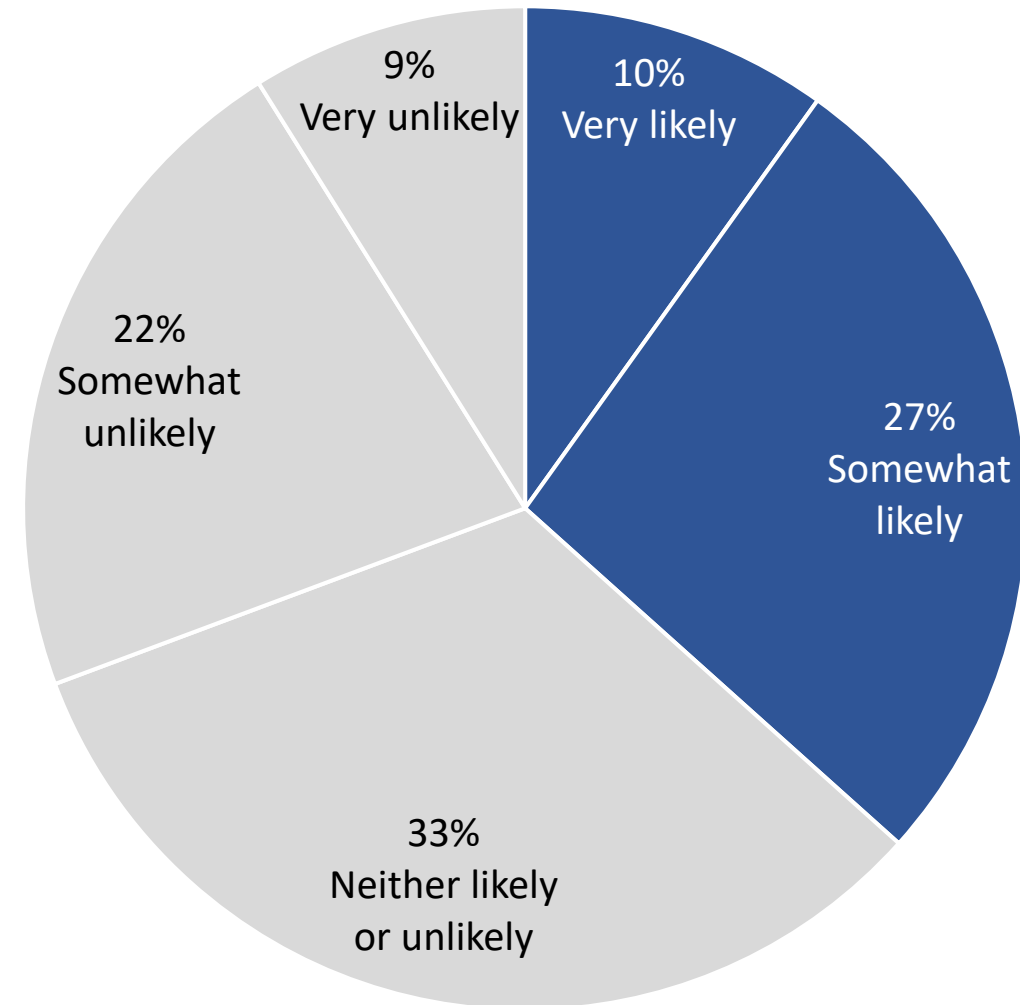
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About 1 in 3 would be likely to give the operator another chance...

But, 74% would contact the operator if there is an issue (+3pts vs 2022)

LIKLIHOOD OF RETURNING IF RESPONSIBLE FOR AN ORDER ISSUE**



Base: 809 consumers who place carryout/delivery orders via third-party website/mobile app

*Q: If you have an issue with your delivery order, how likely are you to contact the restaurant or delivery service to report the issue?

**Q: Thinking about the third-party delivery orders you place, if you have an issue with the order and it's something you blame the [restaurant/delivery service] for, how likely would you be to use that [restaurant/delivery service] again in the future?

What about Sustainability?



NIQ



Education

Key Grocery Trends for 2025

09 January 2025 , 5 mins read

Industry Trends

Consumer Packaged Goods

Since 2020, the grocery sector has seen significant changes in consumer behavior. While some trends are temporary, others are likely to persist, shaping the competitive landscape in an evolving market.

2. Sustainability Matters to Consumers

One thing is very clear: sustainability matters to the public. Almost all consumers (95%) say they are trying to take some action to live sustainably.⁴ The grocery vertical is no exception with, “free-from” and allergen claims becoming more popular on-shelf. With these intentions made clear, there is ample opportunity for grocery brands to align their product offerings and marketing to match this demand.

Yet, NIQ data shows that **26%** of shoppers find it difficult to find sustainable products on the digital shelf.⁴ It's clear that brands and retailers need to make it easier for shoppers to discover and purchase planet-friendly products. This requires making their sustainability attributes accessible on product pages and clear on packaging. Utilizing Better For Segmentation™ to more accurately target your consumers and maximize the impact of your product attributes can also help.


ENVIRONMENT SOCIETY ECONOMY

Consumers Want Sustainable Solutions More Than You'd Expect

New research shows price isn't everything when it comes to consumers' desire for sustainable products. The sharp focus on shoppers' willingness to pay more for sustainable options is obscuring pent-up demand.

APR 11, 2025 By Diane Osgood

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Progressive
GROCER

INDUSTRY NEWS RETAILER DEEP DIVE

TOP WOMEN MORE



10 Most Sustainable Grocers of 2025

Successful retailers show others in the industry how it's done

By PG Staff 4/10/2025

Dedicated readers of Progressive Grocer may well ask how we go about choosing the grocery retailers that make up this list. The answer, simply

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INFORMATION

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REGISTER

SUSTAINABILITY

Sustainability initiatives a top priority for grocery retailers,

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From targeting net zero emissions to reducing or eliminating single-use plastics use and creating innovative ways to fight food waste and promoting recycling, grocery retailers and wholesalers are fighting the good fight for the environment while being keenly aware of social issues facing the communities they serve and the workers they employ.

Indeed, throughout the COVID-19 pandemic, sustainability has remained at the forefront of consumers' concerns, with 69% of supermarket shoppers saying they try to reduce their impact on the environment as much as possible, according to [a report released by the Council \(CCRRC\) of North America](#).

“With consumers increasingly considering and acting on sustainability in their shopping habits and purchases, now is the time for supermarkets to actively examine the challenges facing the industry, to best align with these growing consumer feelings,” director of CCRRC North America. “Shoppers want local supermarkets to lead the way in sustainability, and not doing so could mean losing shoppers down the road.”


Here are some of the latest initiatives being taken by leaders in the grocery industry to achieve sustainability goals.

sn Supermarket News REGISTER

SUSTAINABILITY GROCERY TRENDS & DATA CONSUMER TRENDS

Sustainability ranks high on consumers' shopping list, new report show

Seven in 10 supermarket shoppers try to reduce their impact on environment, says CCRRC North America report



In the CCRRC study, consumers say they will pay 4% more at a food retailer that supports their community and the environment, and they will drive 6.5-10.9 minutes farther to a store with a stronger impact. FOOD LION

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But What Does “**Sustainability**” Mean?



Sustainability isn't a Simple Substrate Switch



Sustainable Packaging:

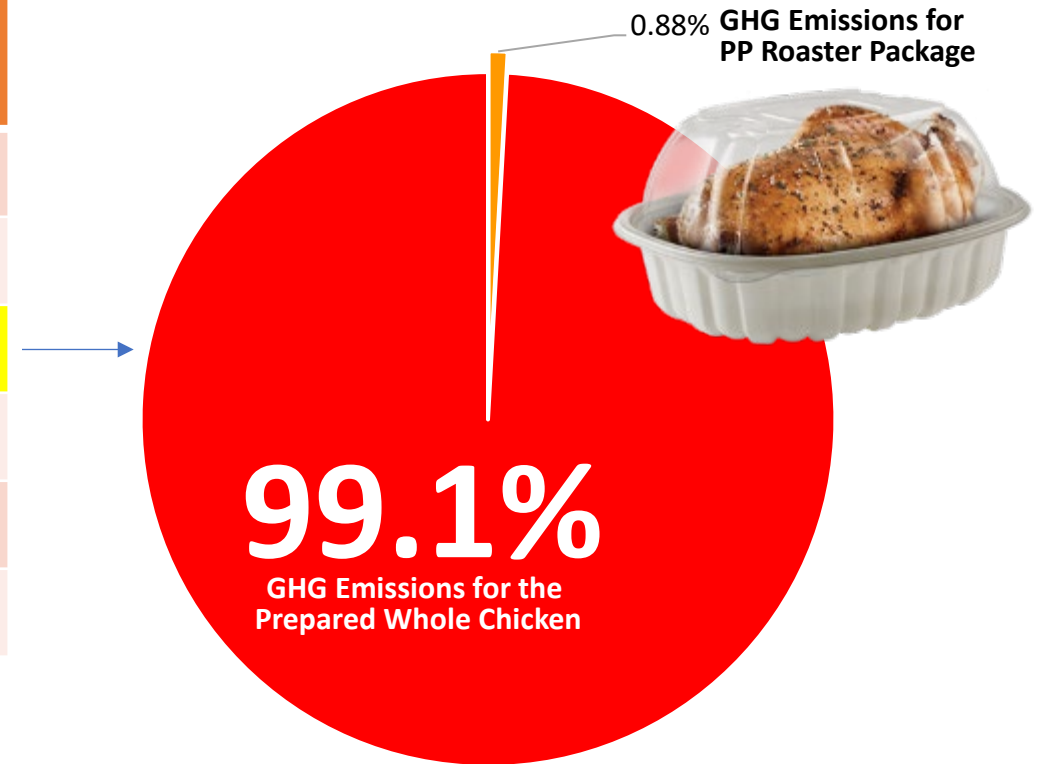
1. **Protects and preserves the food**
to reduce food waste
2. **Offers a viable option to disposal after use**
to reduce packaging waste



Why Prioritize Protecting the Food?

Food Item	GHG Emissions Ratio: Food to Packaging
Ham (cooked)	624:1
Beef	370:1
Whole roasted chicken	114:1
Cheese	52:1
Fish	13:1
Pasta	7:1

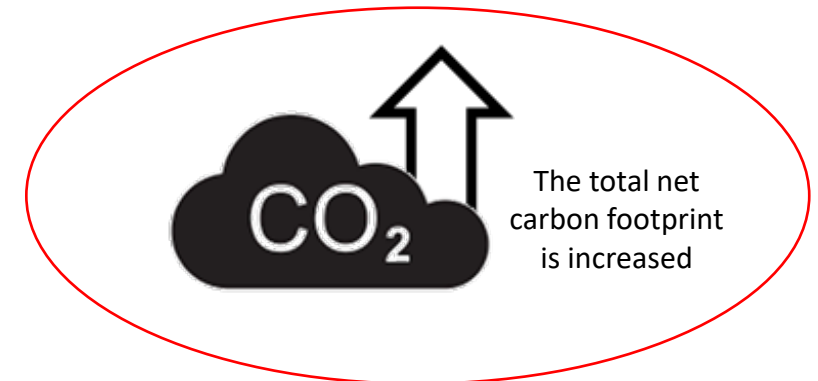
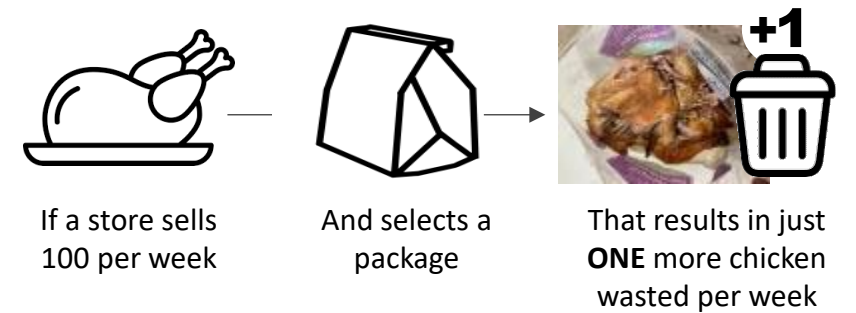
Comparative Share of GHG Emissions



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What Does this Mean for Operators?

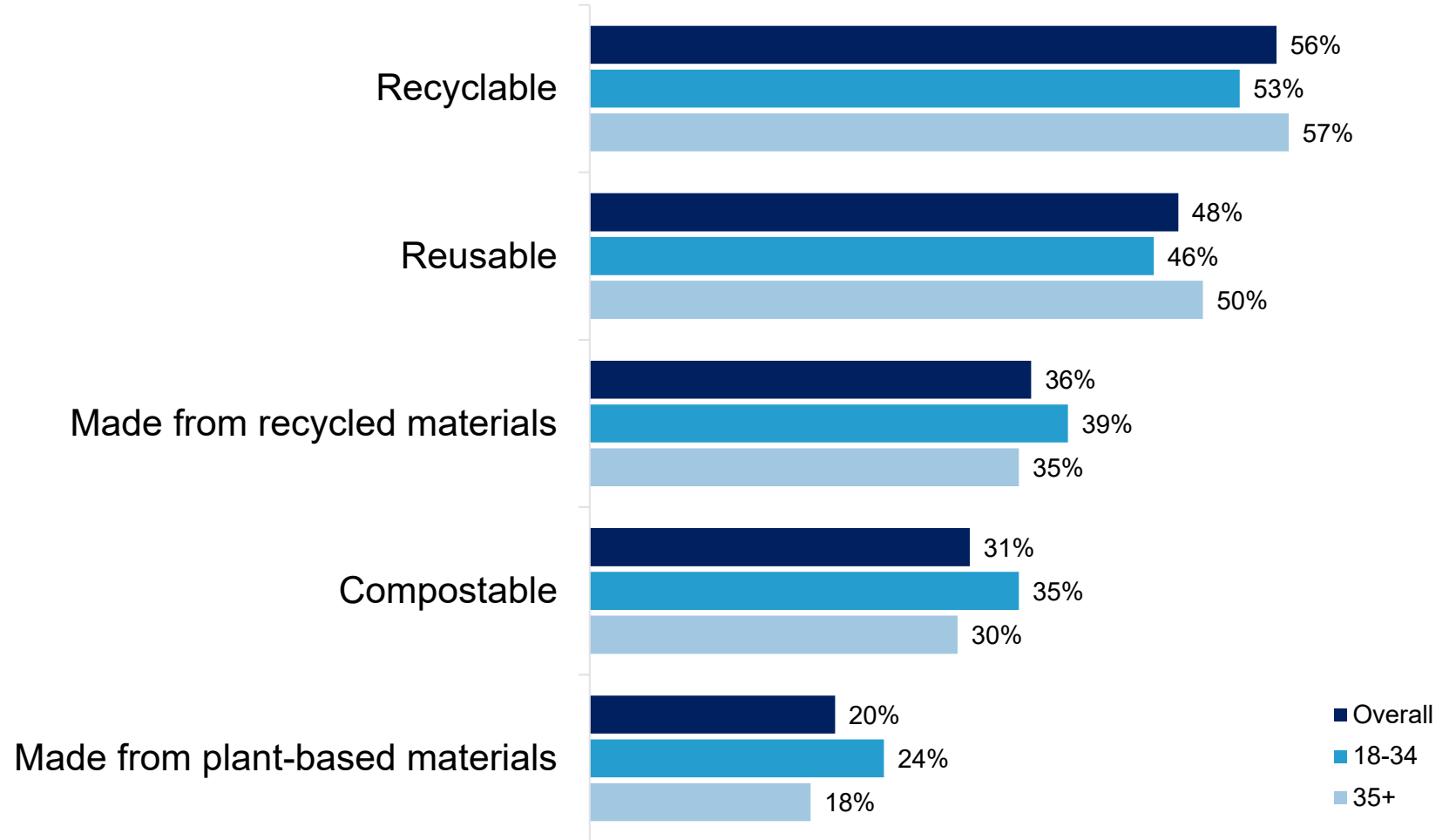


Next, choose packaging that offers an alternative to disposal ***after use.***



For most
consumers,
**“Sustainable”
= Recyclable**

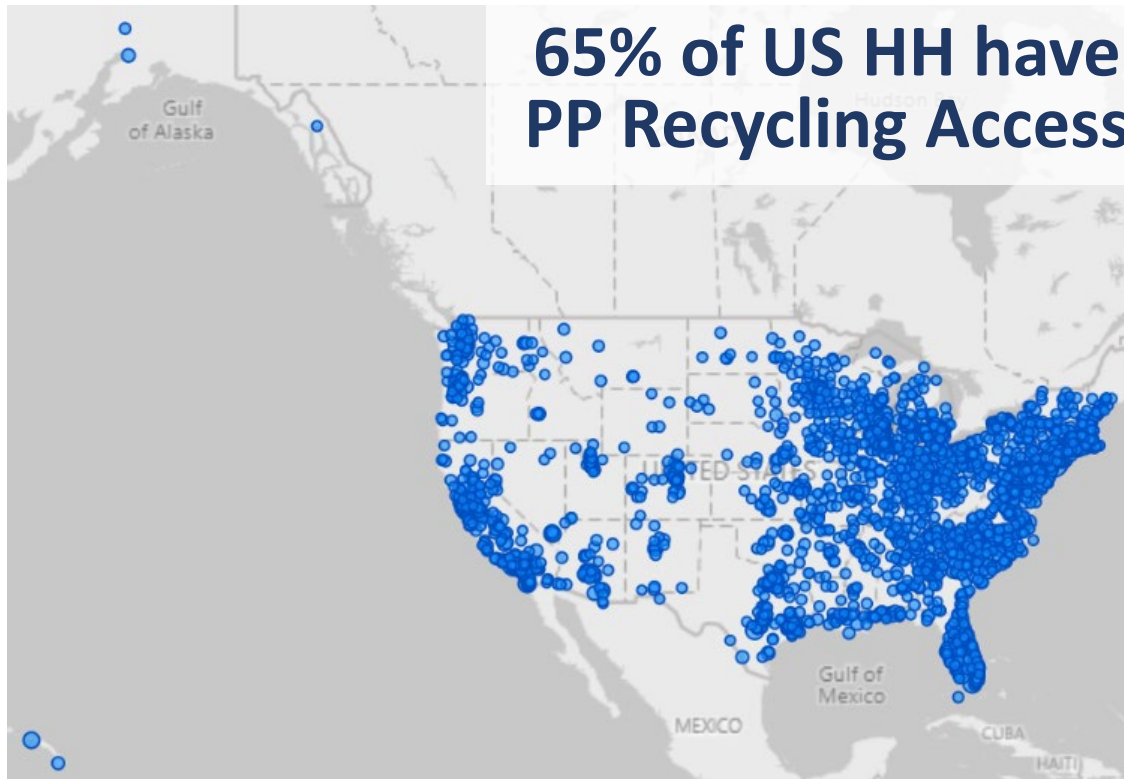
MOST IMPORTANT SUSTAINABILITY FACTORS OF OFF-PREMISE PACKAGING



SOURCE: 2024 Technomic Delivery & Takeout Consumer Trend Report

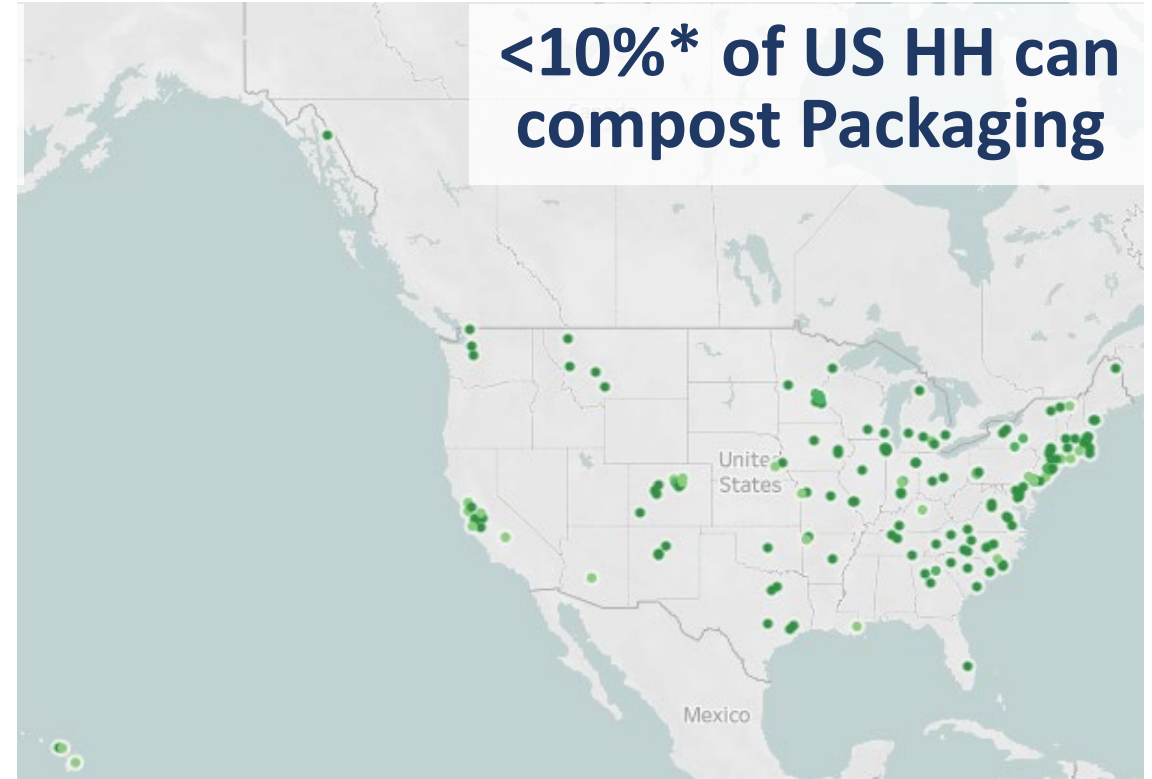
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Why? Because for most consumers, recycling is the most convenient option.



● = Markets with recycling facilities accepting PP bottles, jugs, jars, and tubs (Jan 2025)

SOURCE: The Recycling Partnership, PP Coalition [LINK](#)



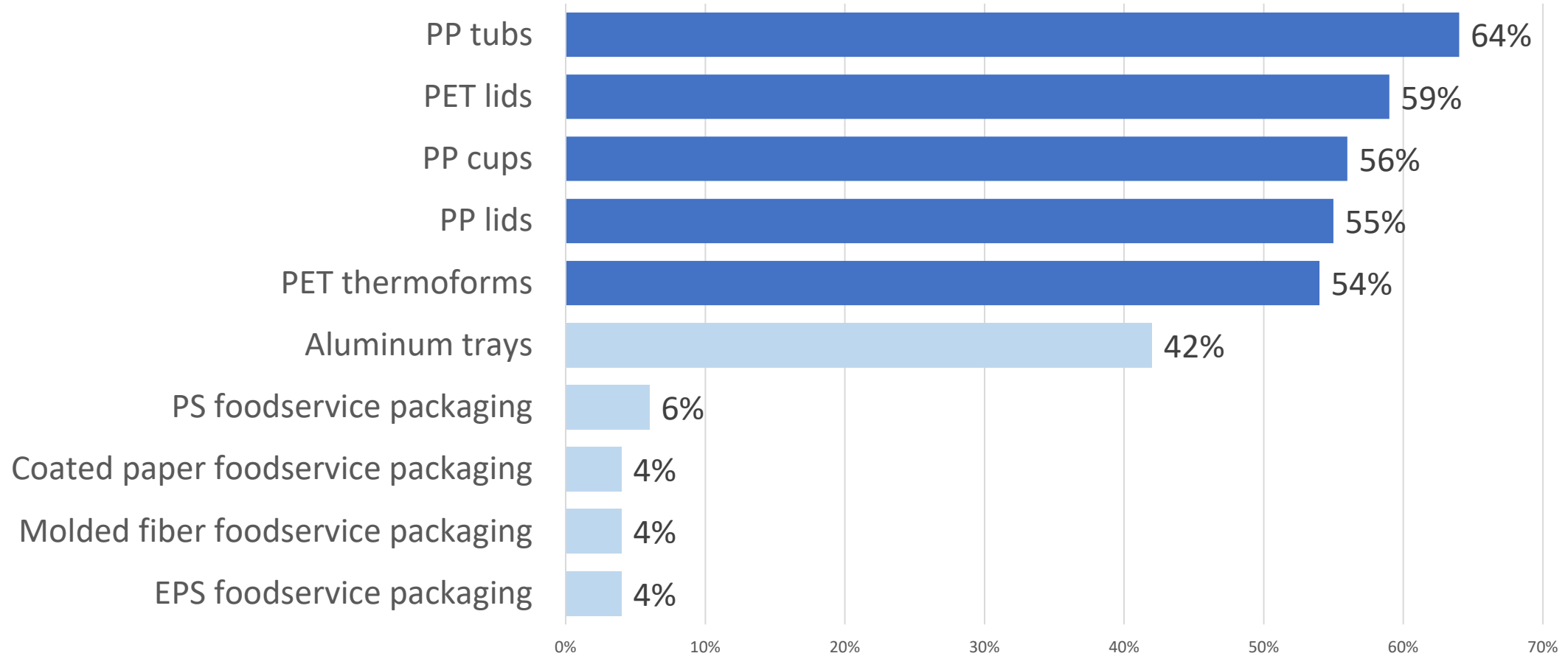
● = Markets with composting facilities accepting fiber and bio-plastic packaging (Jan 2025)

SOURCE: The Sustainable Packaging Coalition [LINK](#)



Recycling Access Varies Significantly

US Household Recycling Access Rates



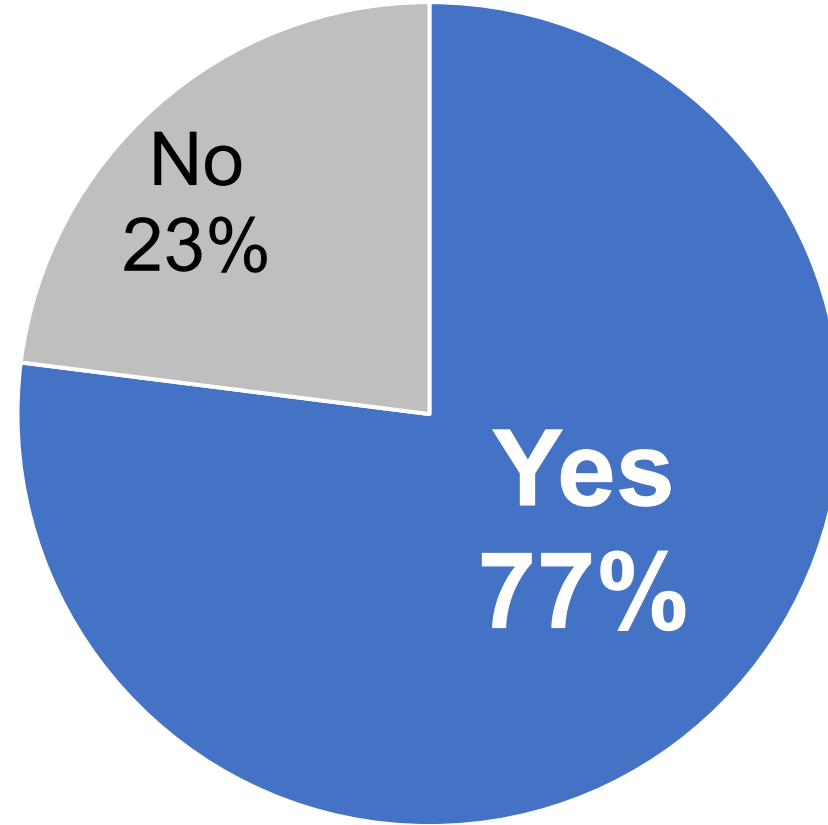
SOURCE: The Recycling Partnership, Community Recycling Program Access (Jan 2025, [LINK](#))

DO YOU EVER SAVE FOOD CONTAINERS RECEIVED FROM RESTAURANTS, DELIS OR GROCERY STORES FOR PERSONAL REUSE?

Also,
Consumers
value reuse.



Consumers recognize “Keepers” for personal reuse



SOURCE: Technomic Packaging Sustainability

Base: 1,000 consumers

Q: Do you ever save food containers received from restaurants, delis or grocery stores for personal reuse?

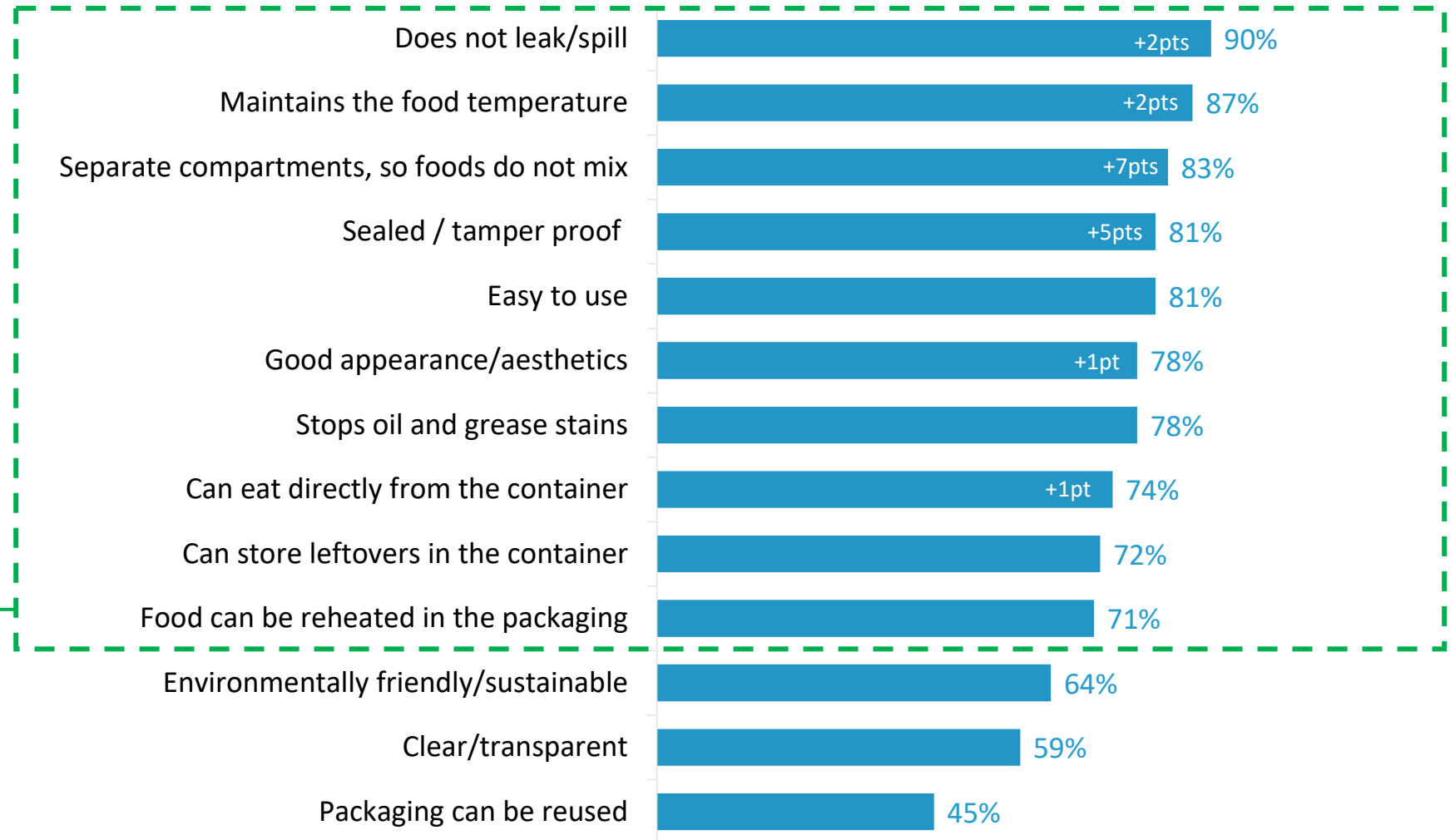
Delivering BOTH



What do consumers expect from foodservice packaging?

Performance

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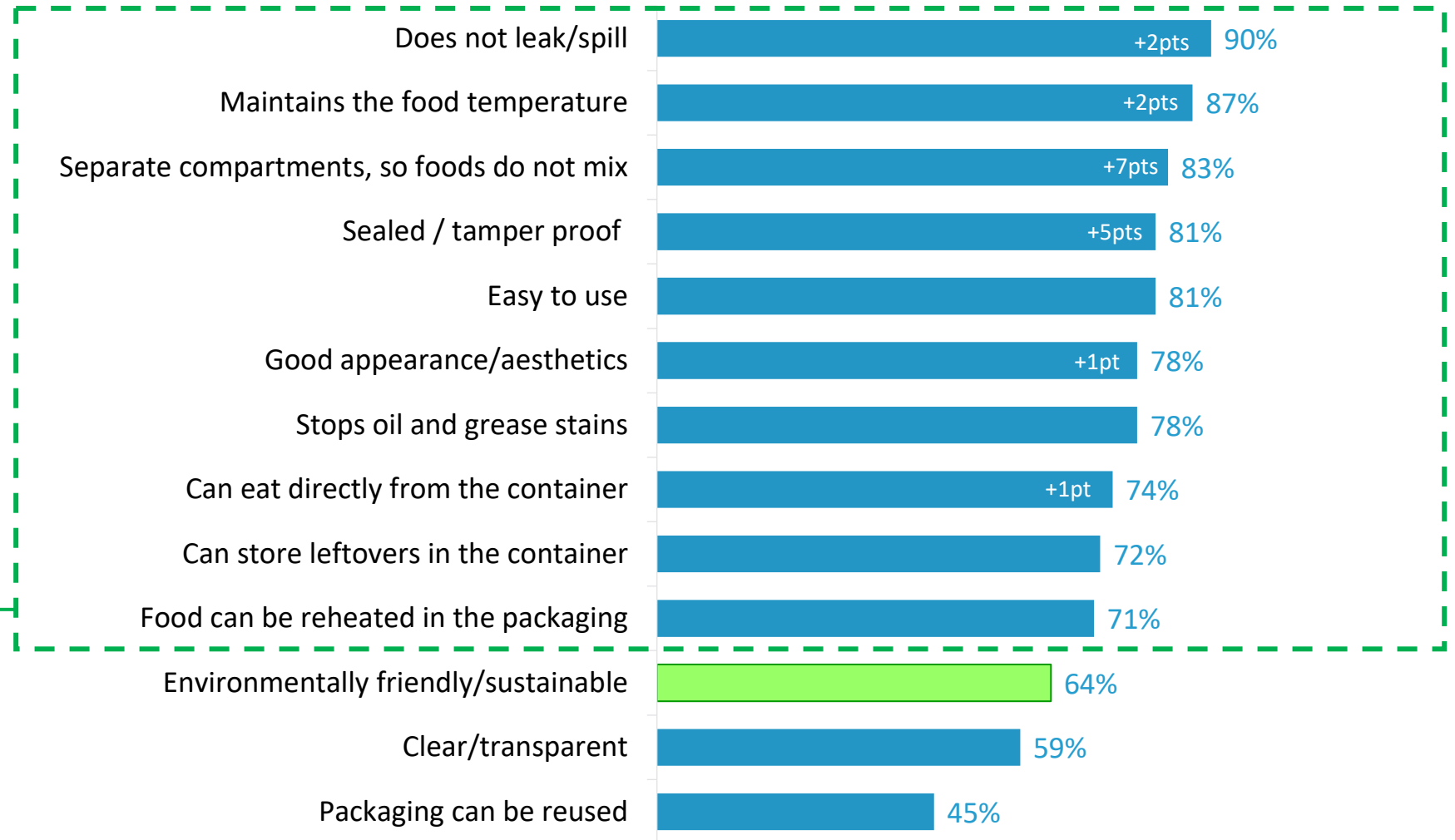
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Action Items:

The foodservice customer is a grocery customer, too.

To win more meals:

- Protect food quality, presentation and convenience
- Prioritize packaging performance
- Select recyclable solutions

...and, don't choose between performance and sustainability – do BOTH.



Questions?





Thank You!

Kurt Richars

Director of Marketing

[Anchor Packaging](#) | 13515 Barrett Parkway, St. Louis, MO 63021

O: 314-394-3722

M: 314-737-0095



Thank You!

Feel free to
contact me with
any questions

Kurt.Richars@anchorpac.com

