GLOBAL RECYCLING HABITS AND ATTITUDES

2025

Delivered by Made with Insight
For Every Can Counts

30/09/2025

SKIP TO

BACKGROUND

CONTEXT

Following the success of its 2020 and 2022 campaigns, Every Can Counts (ECC) commissioned new global research into people's recycling behaviours and attitudes in 2025.

The study was designed and analysed by Made with Insight.

This report provides a concise summary of the results. ECC also has access to the complete data tables — both overall and by market — and can provide the 2020 and 2022 datasets on request.

OBJECTIVES

- Understand and compare current recycling habits
- Identify any barriers and motivations to recycling more, especially when it comes to Deposit Return Schemes (DRS)
- Assess knowledge around recyclability, and specifically around aluminium drink cans recycling
- Track perception of ECC

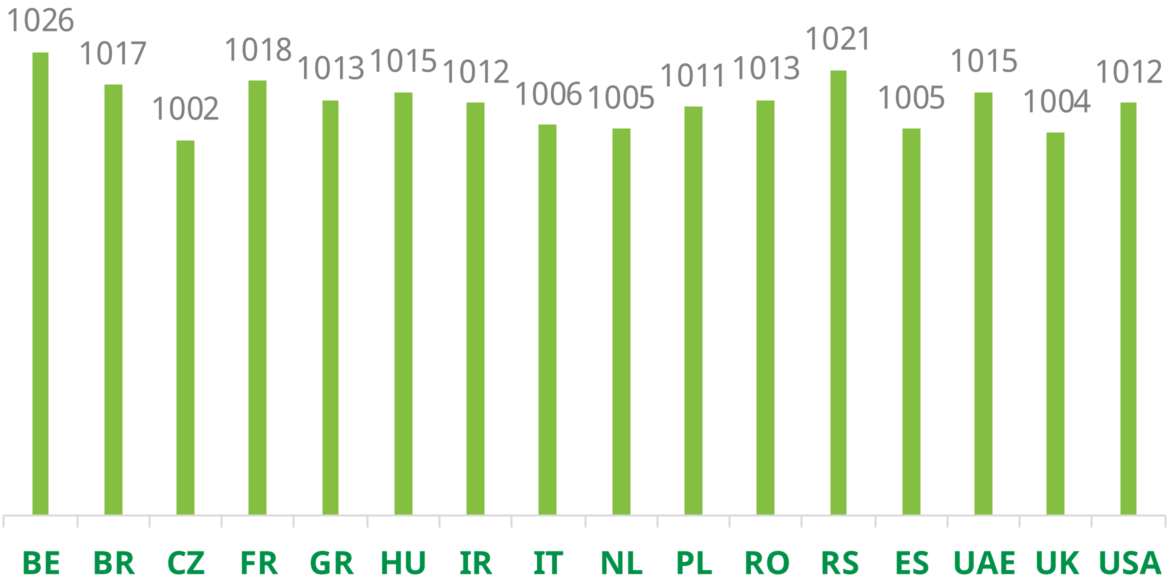
METHODOLOGY

- 10 minute online survey
- Fieldwork ran from 22/07/2025 to 04/08/2025
- Sample targeted: 16+ years, balanced on gender and age group
- Scope covered 16 countries: Belgium, Brazil (new), Czech Republic, France, Greece, Hungary, Ireland, Italy, Netherlands, Poland, Romania, Serbia, Spain, UEA (new), UK and the USA (new).
- Note: the data was not weighted
- The data was analysed for statistically significant differences. Sig. test results comparing countries are not shown in this report, since this is not a priority objective and reduces readability of charts, but these are available in the data tables (provided separately).
- For similar reasons, detailed demographic breakdowns are not shown in the report (but available in the data tables).
- Local markets had the opportunity to customise some question statements and answer options. Whilst not present in the report these results are also available in the data tables.

SAMPLE

16,195
RESPONDENTS IN TOTAL

Breakdown per market as follows:



SUMMARY

EXECUTIVE SUMMARY

- **1. Nearly 9 in 10 recognise the importance of key environmental issues, including plastic pollution.**
  72% say plastic pollution and waste is a very or extremely important issue (intensity differs across markets), signalling strong public concern and highlighting the wider sustainability context in which beverage packaging choices are judged, paving the way for more sustainable alternatives.

- **2. Deposit Return Schemes garners support and shows promise**
  In markets with established schemes, participation is near universal, and support is high in non-DRS markets. However, what motivates people to take part differs: some markets prioritise convenient return locations (e.g. Brazil, Poland), others respond most to higher deposit refunds (e.g. Czech Republic, Spain, Greece), while simpler processes or extra rewards also play a role, showing where systems need to concentrate on locally.

- **3. The concept of circularity resonates with consumers**
  Circularity has clear potential to resonate with consumers. When prompted, most people associate circular packaging with being recycled back into the same type of product, and many also define recyclability in circular terms — showing the concept is both intuitive and meaningful to the public.

- **4. While consumers place the primary responsibility for recycling drink cans on themselves, a more nuanced picture of shared responsibility emerges**
  More than half of respondents place the main responsibility on individuals to recycle cans, while many also assign responsibility to brands, industry, waste collectors, and governments. The balance differs by country, but the overall picture is one of shared accountability. Nearly 9 in 10 say manufacturers and brands should be required to use packaging that is infinitely/ fully recyclable or made from recycled materials.

DETAILED FINDINGS

The detailed findings are broken down into 3 sections

1- Context & Key issues

2- Deposit Return Scheme

3- Brand and Coms

CONTEXT
& KEY ISSUES

IMPORTANCE OF KEY ISSUES - OVERALL

Plastic pollution tops global concerns — matching climate change, deforestation, and air pollution in public priority. Nearly 9 in 10 people worldwide see plastic waste as an important issue and 72% say it is very/extremely important, placing it on par with the planet's most pressing environmental challenges. This strong consensus highlights growing public demand for action to reduce plastic waste alongside broader climate and environmental goals.

How important are the following to you

	Not at all / slightly important		Moderately / very / extremely important			Net important	Net very/extr.
Climate change	5%	9%	21%	32%	34%	87%	66%
Plastic pollution/waste	3%	7%	18%	37%	36%	90%	72%
Deforestation	4%	7%	20%	34%	35%	89%	69%
Air pollution	3%	7%	18%	36%	36%	90%	72%

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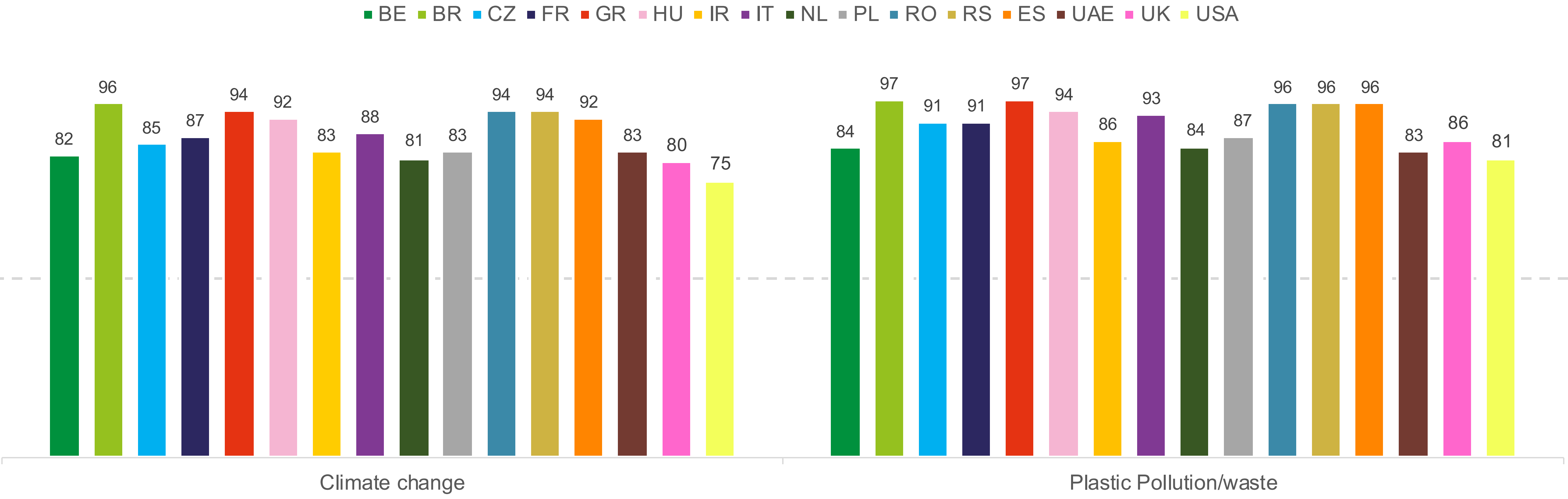
IMPORTANCE OF KEY ISSUES – BY COUNTRY, TOP 3 BOX

Across all countries, a vast majority of respondents find all 4 issues around climate change, plastic pollution, deforestation and air pollution important. In particular, concern about climate change and plastic pollution (shown here) is consistently high across all markets. Apart from the US, over 8 in 10 people rate these issues as important across the board.

How important are the following to you, in percentage

Showing percentages, net important (top 3 box) for climate change and plastic pollution



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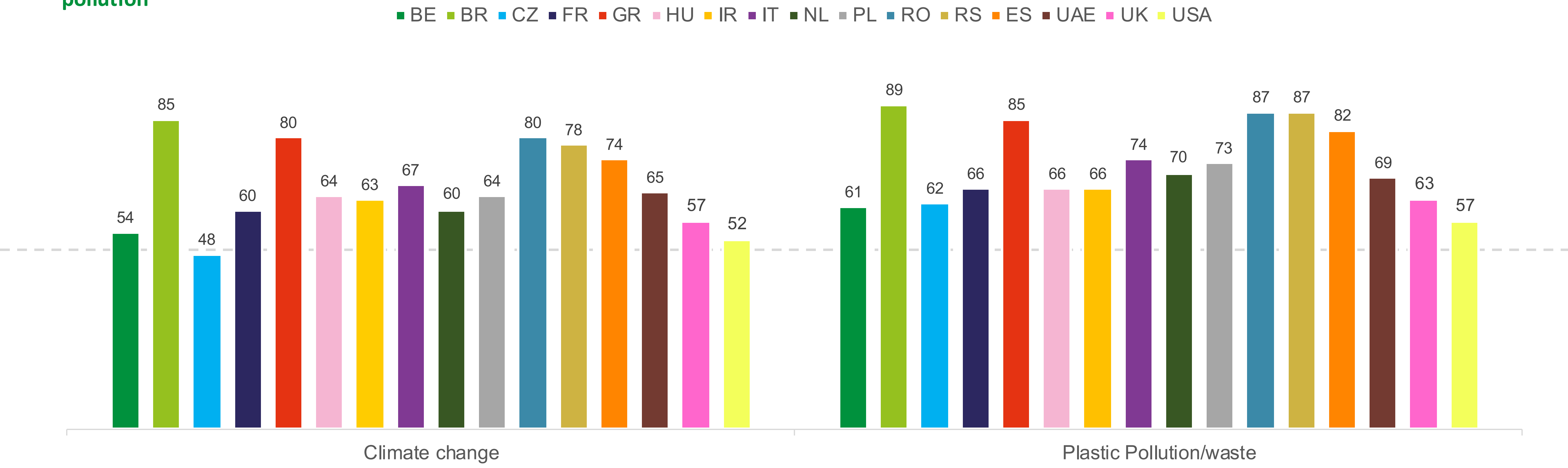
→ Full chart

IMPORTANCE OF KEY ISSUES – BY COUNTRY, TOP 2 BOX

When considering only the top 2 boxes (very/extremely important) variation appear more clearly. Brazil stands out with the highest concern on both measures (85% for climate change and 89% for plastic pollution). Greece also shows very strong engagement, with 80% citing climate change and 85% plastic pollution. At the other end, the Czech Republic is the least engaged on climate change (48%), with the USA also low at 52%. On plastic pollution, the USA again sits at the bottom (57%).

How important are the following to you, in percentage

Showing percentages, net very/extremely important (top 2 box) for climate change and plastic pollution



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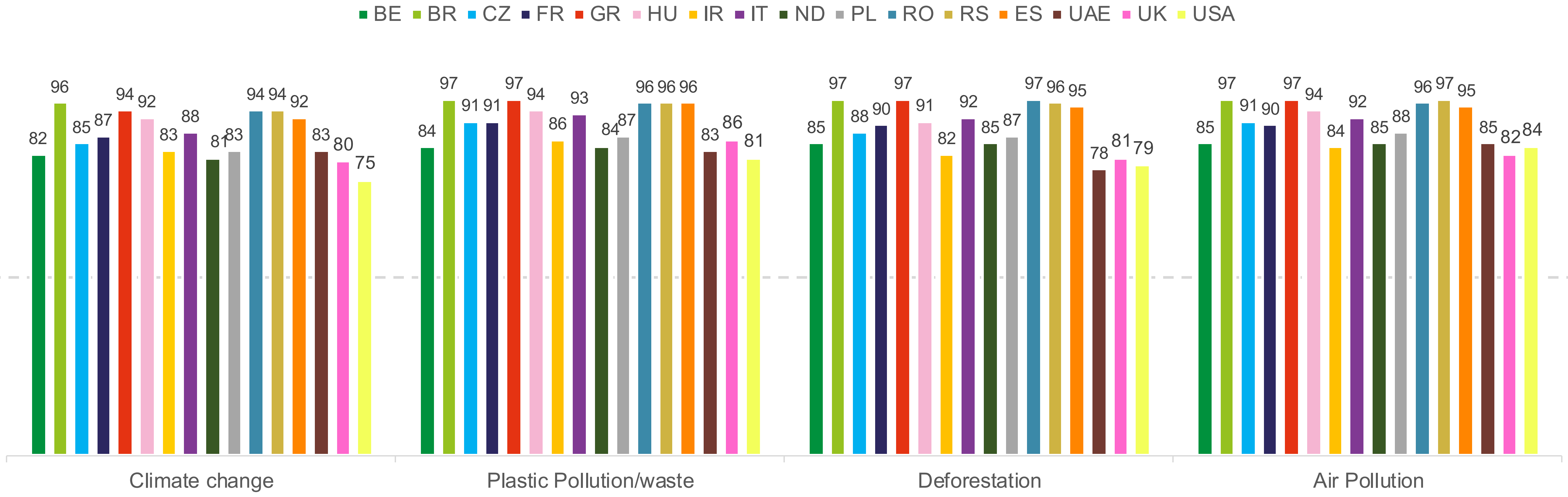
IMPORTANCE OF KEY ISSUES – BY COUNTRY, TOP 3 BOX

Across all countries, a vast majority of respondents find all 4 issues around climate change, plastic pollution, deforestation and air pollution important.

How important are the following to you, in percentage

Showing percentages, net important (top 3 box)



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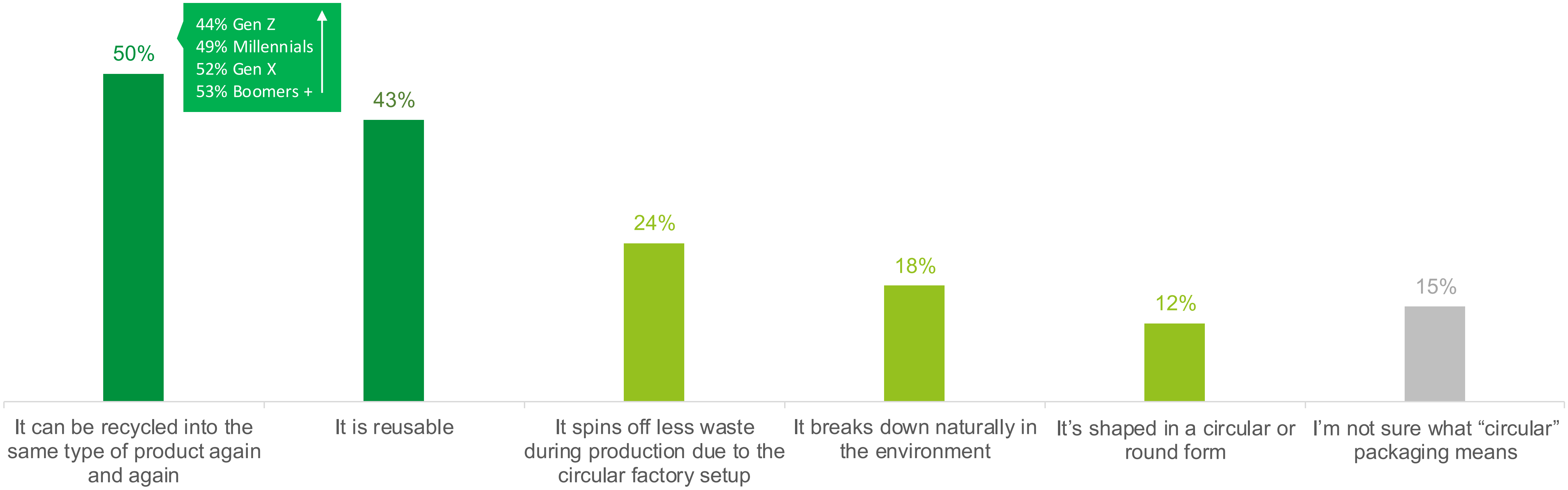
PROMPTED AWARENESS OF CIRCULARITY

Half of respondents correctly associate circular packaging with being recycled into the same type of product repeatedly, suggesting this definition will resonate well with consumers (especially older generations). A further 43% link it to reusability, a valid but less specific understanding. However, misconceptions remain: around one-quarter associate it with reduced production waste, 18% with biodegradability, and 12% with packaging shape. Notably, 15% are unsure what it means, highlighting that knowledge gaps persist despite aided association.

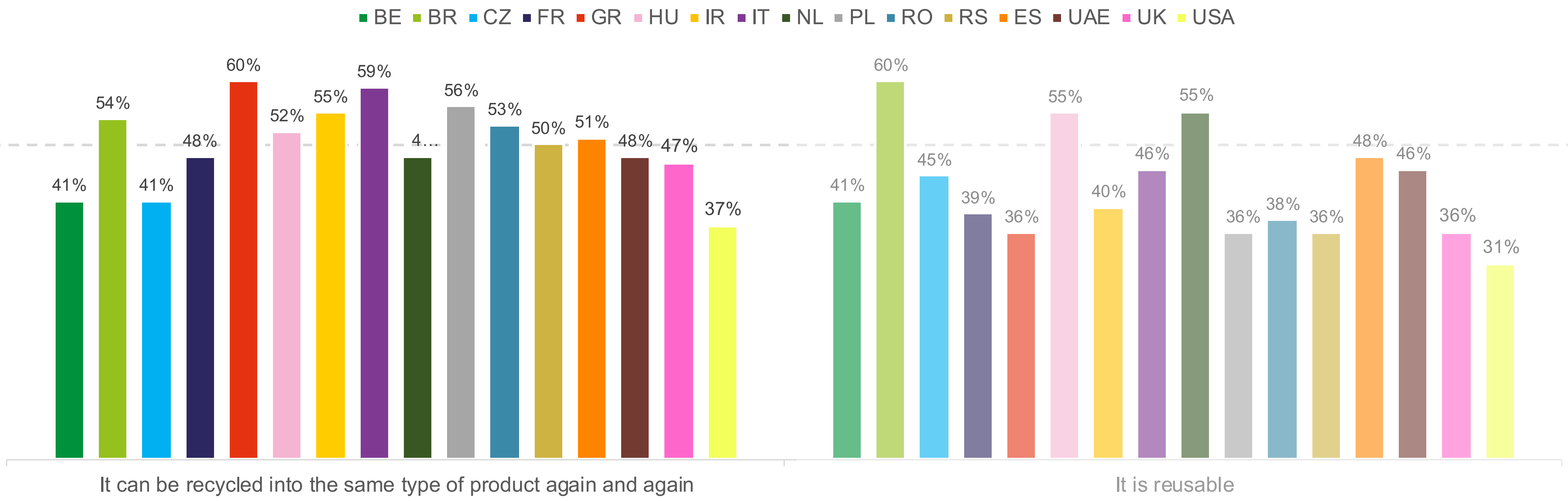
When you think of circular packaging, what comes to mind?



PROMPTED AWARENESS OF CIRCULARITY – BY COUNTRY

Recognition of circular packaging varies across markets with 9 out of 16 markets associating the term with its correct definition. Greece leads, with 60% linking it to being recycled into the same type of product repeatedly, followed by Italy (59%) and Poland (56%). At the lower end, Belgium and the Czech Republic are both 41%, while the US show the lowest score at 37%. Reusability is a common secondary association, with highest mentions in Brazil, Hungary and the Netherlands (55–60%).

When you think of circular packaging, what comes to mind?



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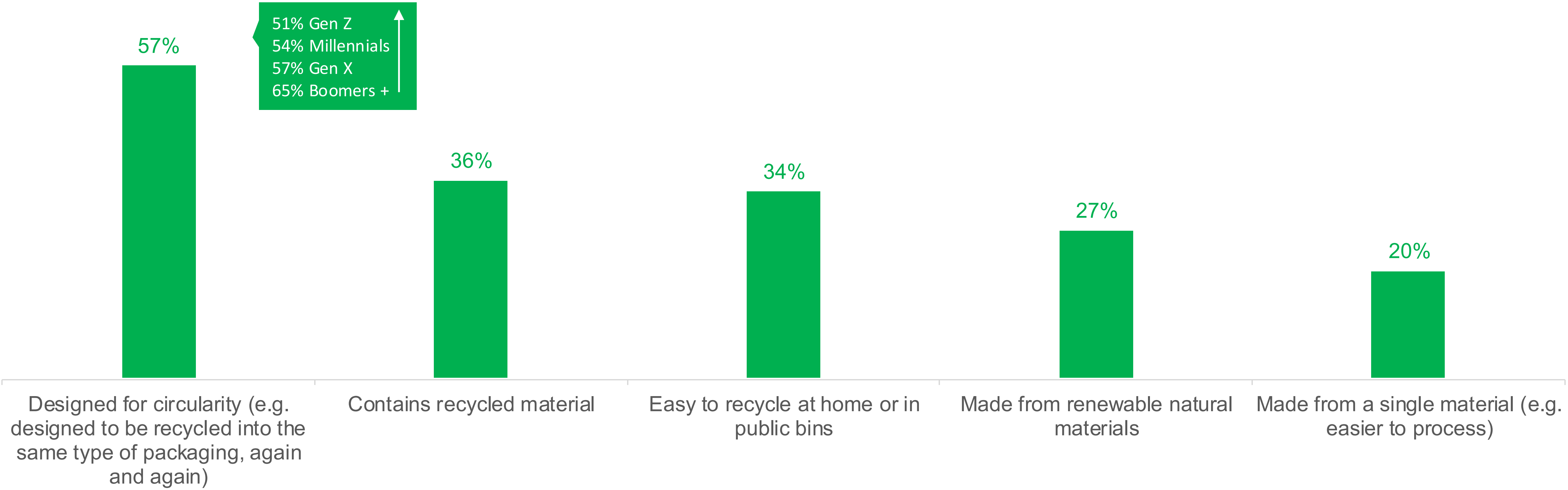
WHAT MAKES A PACKAGING RECYCLABLE - OVERALL

Most people (57%) define recyclable packaging as being designed for circularity. Over a third link it to using recycled or renewable materials, or being easy to recycle at home. The likelihood of associating recyclable packaging with being designed for circularity increases with age, from just over half of Gen Z (51%) to nearly two-thirds of Boomers+ (65%).

Which of the following best reflects what you understand "recyclable packaging" to mean?



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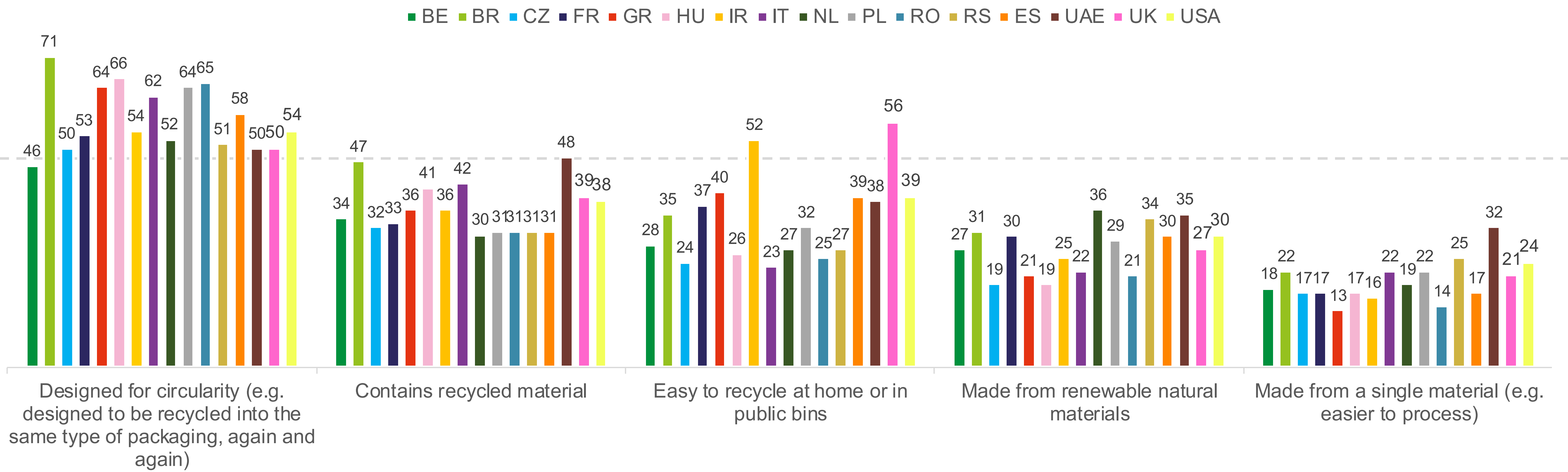
WHAT MAKES A PACKAGING RECYCLABLE – BY COUNTRY

Associations with recyclable packaging differ markedly by country. Brazil shows the strongest link to 'designed for circularity' (71%), with high recognition also in Hungary (66%), Romania (65%), Greece and Poland (64%). The UK (56%) and Ireland (52%) lead in associating recyclability with ease of recycling at home or in public bins, while the UAE, responses are more evenly spread, ranging from 32% to 50% across categories

Which of the following best reflects what you understand "recyclable packaging" to mean?

Multiple answers allowed, showing percentages



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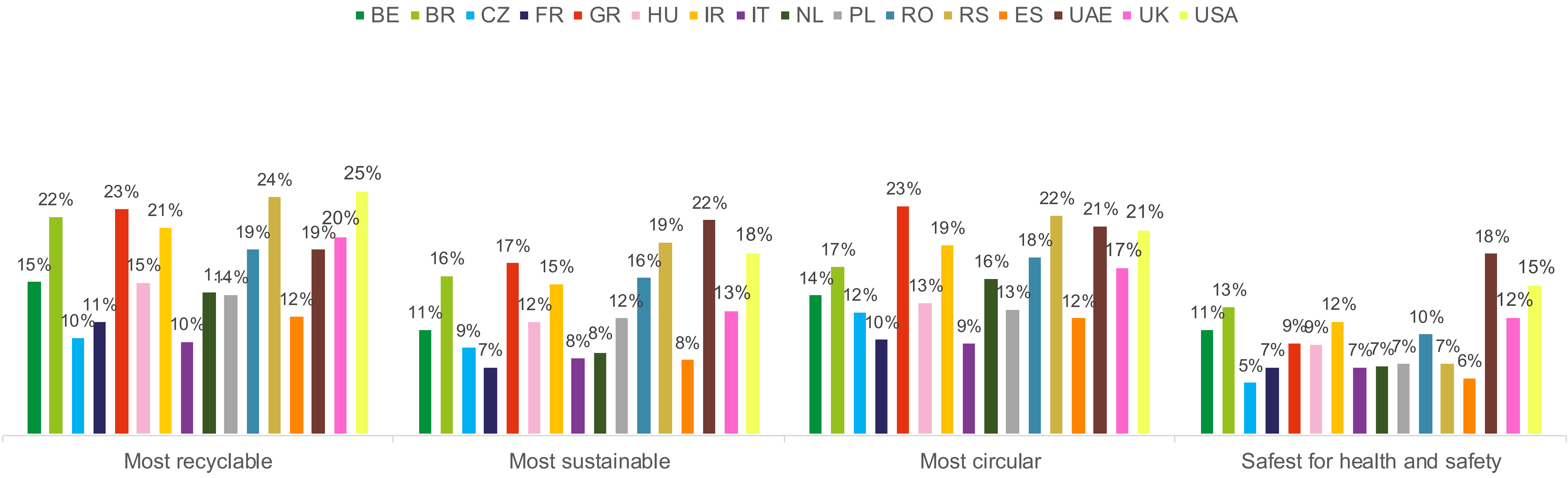
PACKAGING PROPERTY - CANS PERFORMANCE BY COUNTRY

Perceptions of drink cans vary notably by market but remain relatively low across all measures. For recyclability, the highest scores come from the USA (25%), Serbia (24%), and Greece (23%). Sustainability perceptions peak in the UAE (22%). Circularity scores are highest in Greece (23%) and Serbia (22%). On health and safety, the highest ratings are again in the UAE (18%) and USA (15%), with most markets under 12%. Overall, cans under-index on all measures, signalling a clear opportunity to strengthen positive messaging around their recyclability and circularity.

Thinking about different types of drinks packaging, how would you rate each one based on the following characteristics?

Showing results for drink cans



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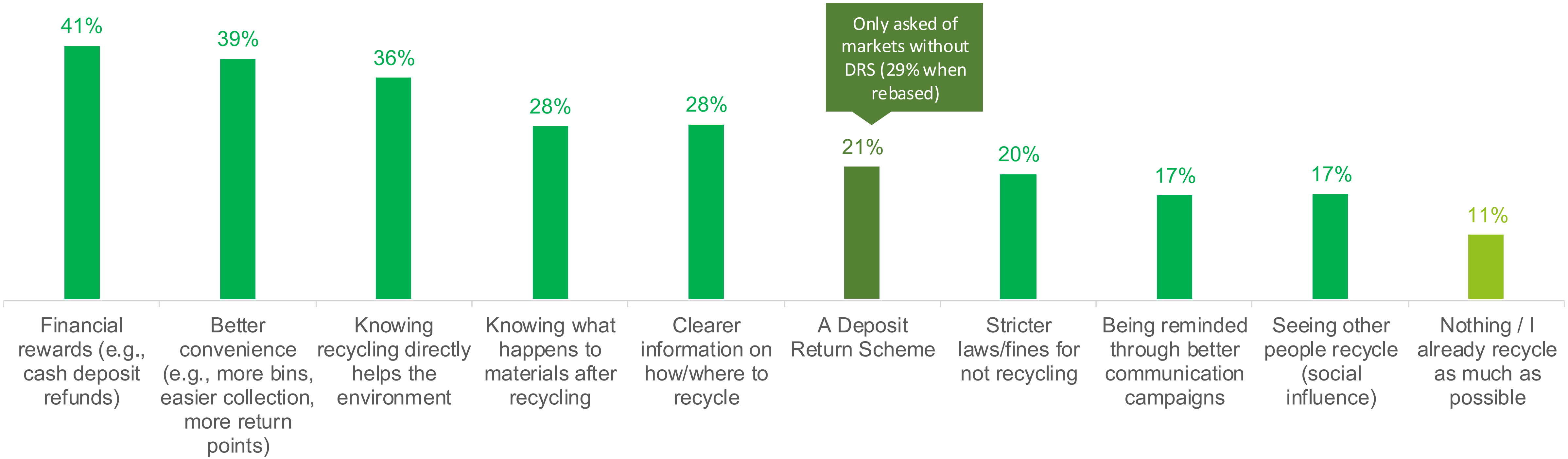
DRIVERS TO INCREASE RECYCLING - OVERALL

While there is no silver bullet, the strongest motivators for recycling are financial rewards such as deposit refunds (41%) and better convenience (39%). Environmental concern is also important, with 36% saying they are motivated by knowing recycling directly helps the environment. 28% want more transparency about what happens to materials or clearer information on how and where to recycle. Regulatory enforcement and communication play more secondary roles. 29% of those in markets without DRS say the scheme would motivate them to recycle more of their drinks packaging. Age has a limited impact on motivations overall (not shown).

What, if anything, would motivate you most to recycle more of your drinks packaging waste?



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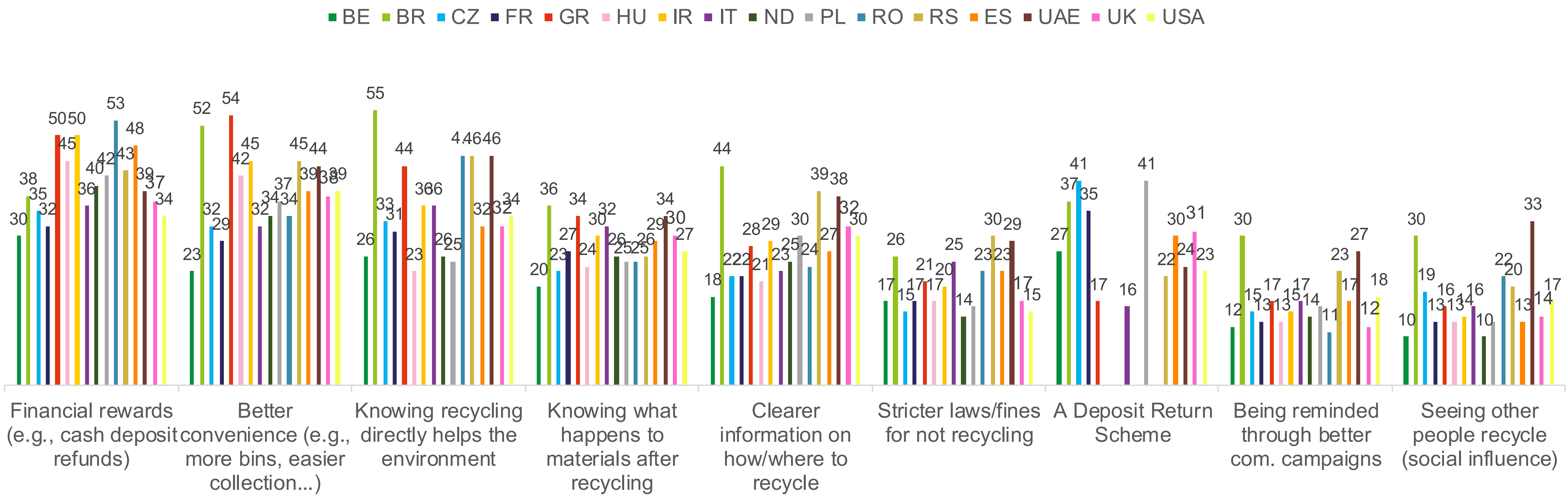
DRIVERS TO INCREASE RECYCLING – OVERALL

Financial incentives resonate most in Romania (53%), Ireland and Greece (50%). Convenience is strongest in Greece (54%) and Brazil (52%), while formal Deposit Return Schemes are seen as especially effective in the Czech Republic and Poland (41%). Brazil is exceptional for environmental impact (55%), followed by Romania, Serbia and the UAE. The UAE leads on social influence (33%).

What, if anything, would motivate you most to recycle more of your drinks packaging waste?
Multiple answers allowed, showing percentages



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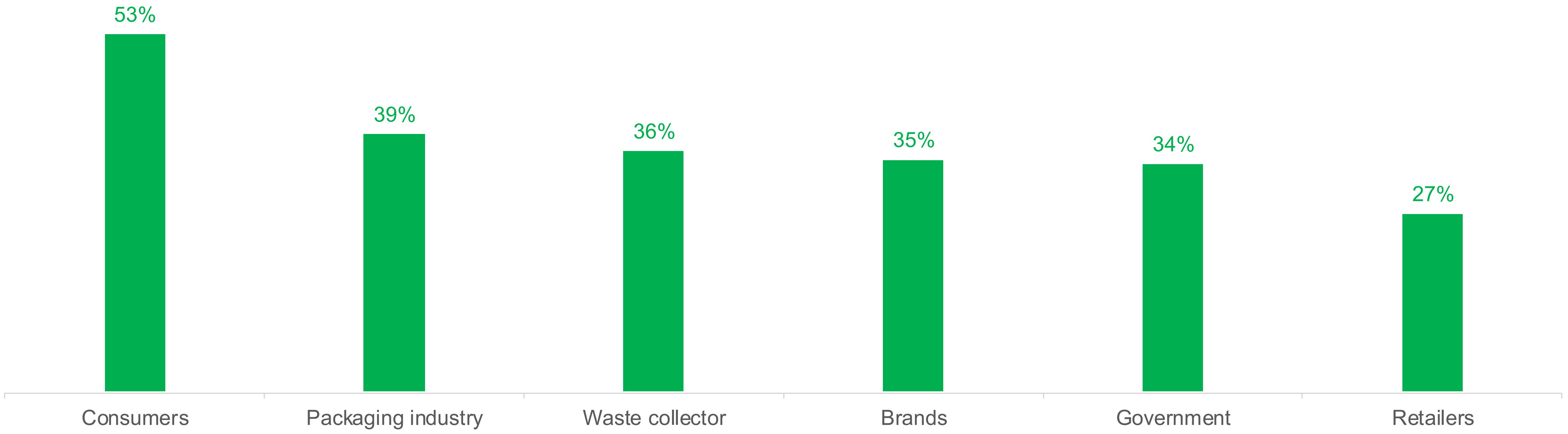
DRINK CAN RECYCLING RESPONSIBILITY - OVERALL

Consumers are seen as carrying the greatest responsibility for drink can recycling (53%), well ahead of any other group. Responsibility is also attributed to the packaging industry (39%), waste collectors (36%), brands (35%) and government (34%), showing that expectations are shared across the system. Retailers are least associated with responsibility (27%), suggesting the public sees them as having a more limited role. Overall, while consumers are placed at the centre, there is a sense that responsibility is shared by multiple stakeholders, or that is remains unclear who should be accountable, with room to shape opinion.

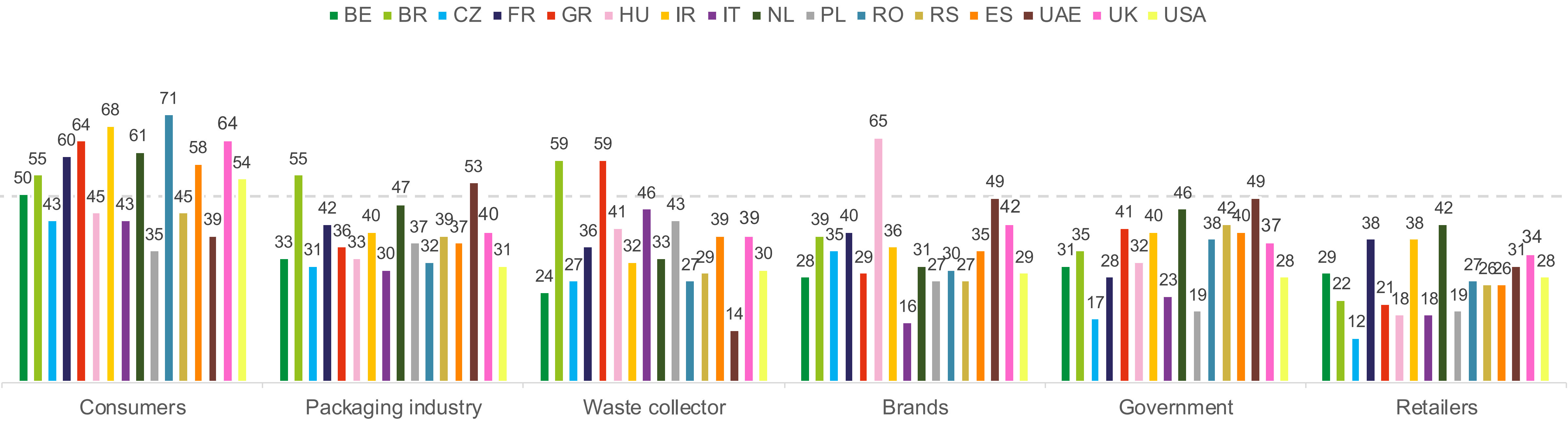
Who do you believe is responsible for drink can recycling?



DRINK CAN RECYCLING RESPONSIBILITY – BY MAKRET

Perceptions of who is responsible for can recycling vary sharply across markets. Consumer responsibility peaks in Romania (71%), Ireland (68%), and the UK and Greece (64%), but drops to just 35% in Poland. Industry and system actors also diverge: Hungary stands out for placing a strong onus on brands (65%), the packaging industry is held responsible by 55% in Brazil and 53% in the UAE, and waste collectors are seen as key players by majorities in Greece and Brazil (59%). Government responsibility is most emphasised in the UAE (49%) and the Netherlands (46%), compared with just 17% in the Czech Republic. Retailers remain lowest overall, but even here the Netherlands (42%) contrasts strongly with the Czech Republic (12%).

Who do you believe is responsible for drink can recycling?
Multiple answers allowed, showing percentages.



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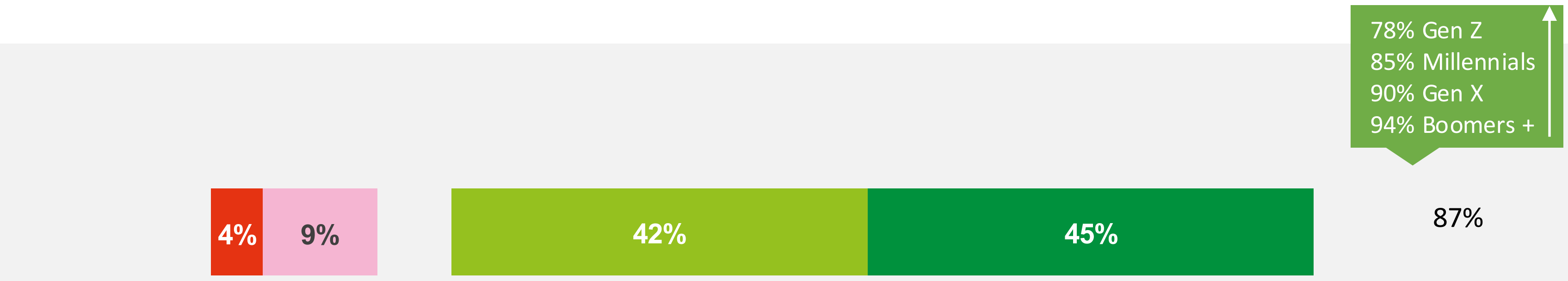
RECYCLING STATEMENTS - OVERALL

Around 7 in 10 (71%) say they would be more likely to recycle if the experience were made fun or interactive through rewards, games, or apps — showing that engagement tools can play a supportive role. At the same time, there is even stronger agreement (87%) that manufacturers and brands should be required to use fully recyclable or recycled packaging, underlining a broad demand for systemic responsibility in making recycling prevalent. Interestingly, support for this requirement increases with age — from 78% among Gen Z to 94% among Boomers — suggesting older generations are particularly strong advocates for brand accountability in materials chosen for packaging.

To what extent do you agree or disagree... **Strongly / somewhat disagree** **Somewhat / strongly agree**

I would be more likely to recycle if the experience were fun or interactive (e.g. rewards, games, or apps that track and celebrate recycling)

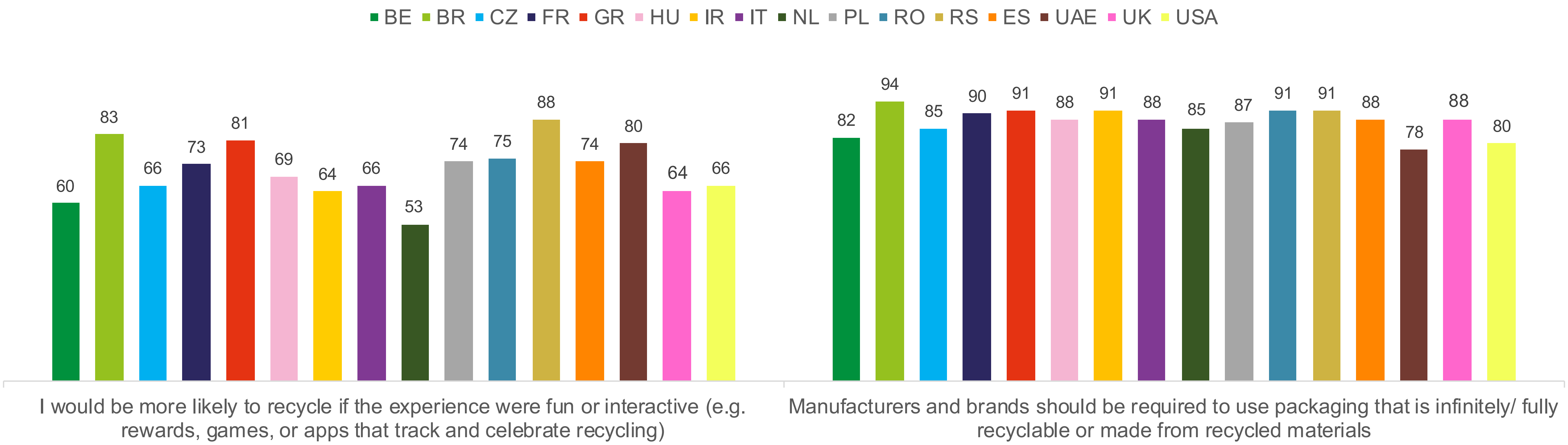
Manufacturers and brands should be required to use packaging that is infinitely/ fully recyclable or made from recycled materials



RECYCLING STATEMENTS - BY COUNTRY

Attitudes towards recycling show two clear patterns. First, making recycling more engaging through rewards, games or interactive apps could boost participation, particularly in Brazil (83%), Greece (81%) and Serbia (88%), while interest is lower in markets such as the Netherlands (53%) and Belgium (60%). Second, there is near-universal agreement that manufacturers and brands should be required to use fully recyclable or recycled materials, with support consistently high across markets and peaking at 94% in Brazil.

To what extent do you agree or disagree…
Showing net agree in percentages



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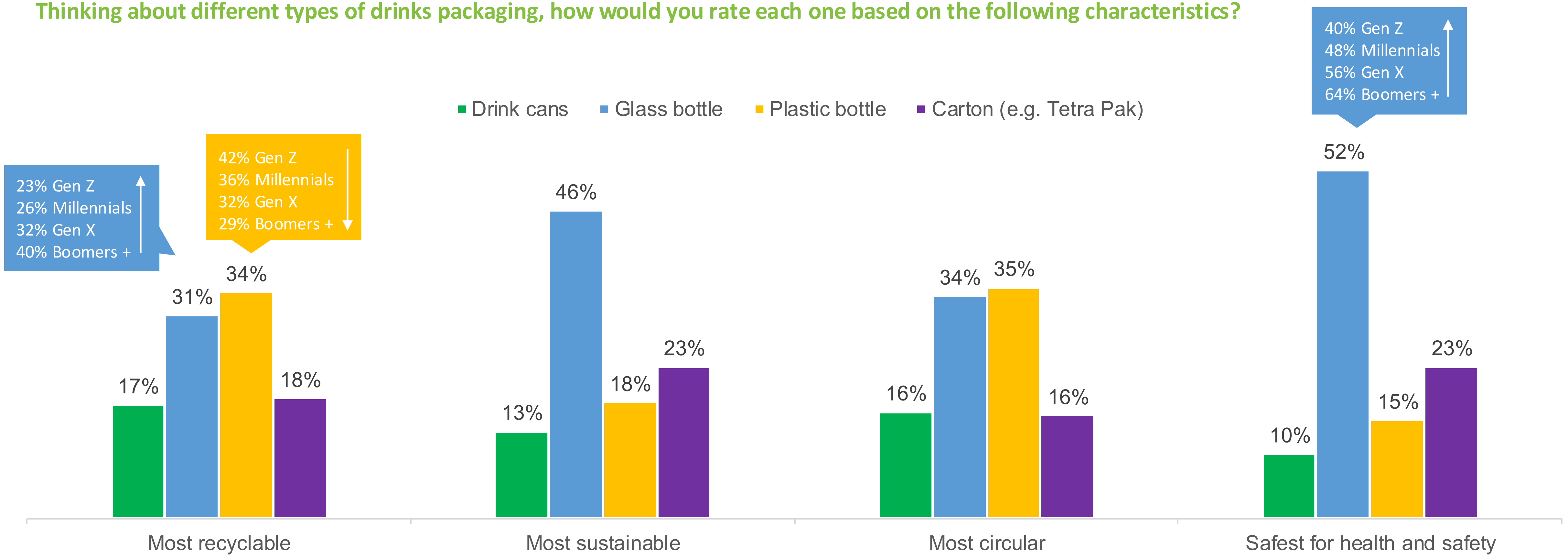
PACKAGING PROPERTY - OVERALL

Fewer than 2 in 10 people rate drink cans as the most recyclable, sustainable, circular, or safest packaging. Notably, plastic bottles lead perceptions of recyclability, especially for younger generations and despite being one of the least recyclable options in practice (older generation tend to favour glass). Glass bottles dominate for sustainability and health/safety, with ratings increasing sharply with age (64% of Boomers+ vs. 40% of Gen Z). Boomers+ consistently give cans the lowest ratings, especially for sustainability (11%) and circularity (14%). These findings highlight a clear perception gap and the need to better communicate the true recyclability and circularity benefits of cans.

Thinking about different types of drinks packaging, how would you rate each one based on the following characteristics?



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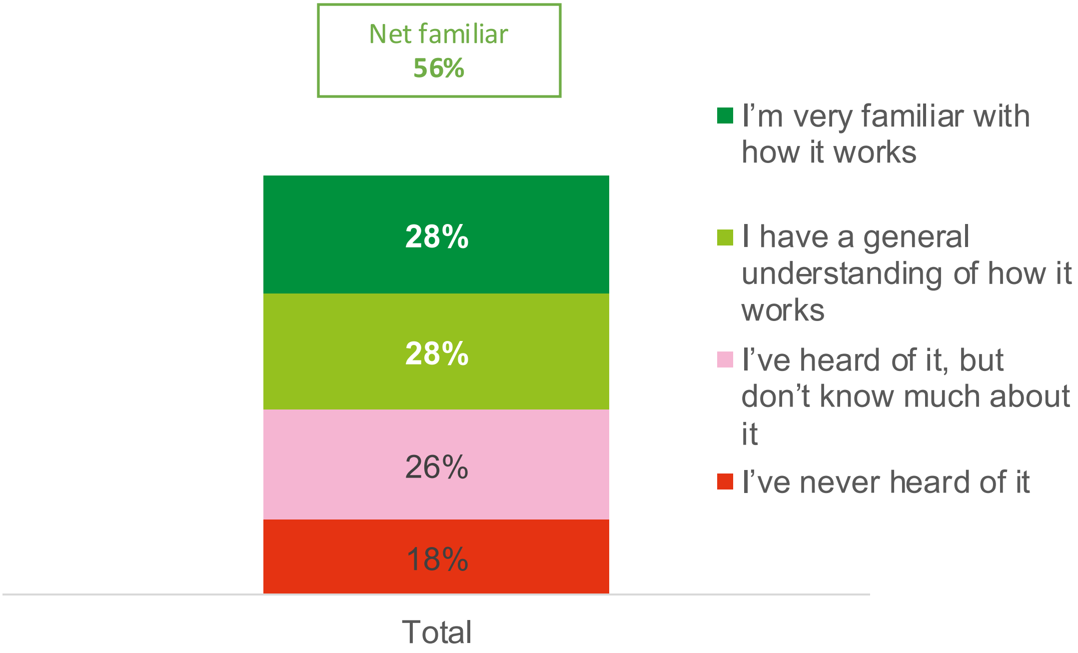
DEPOSIT RETURN SCHEME (DRS)

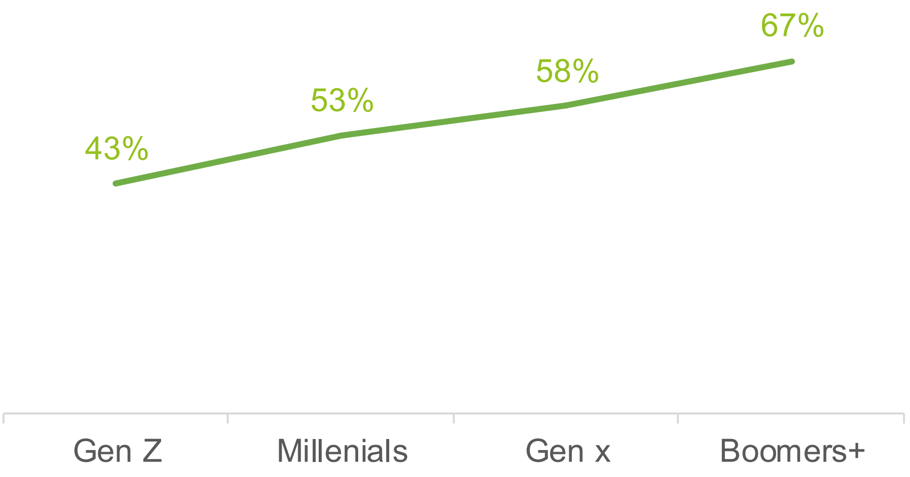
DEPOSIT RETURN SCHEME (DRS) FAMILIARITY – OVERALL

While DRS is only present in Hungary, Ireland, the Netherlands and Romania, across markets a majority (56%) are familiar with the concept, with over 1 in 4 saying they are very familiar. Older generations are more likely to be familiar with the scheme.

How familiar are you with the idea of a Deposit Return Scheme (DRS) in your country — whether it's currently in place, being planned, or has been discussed?



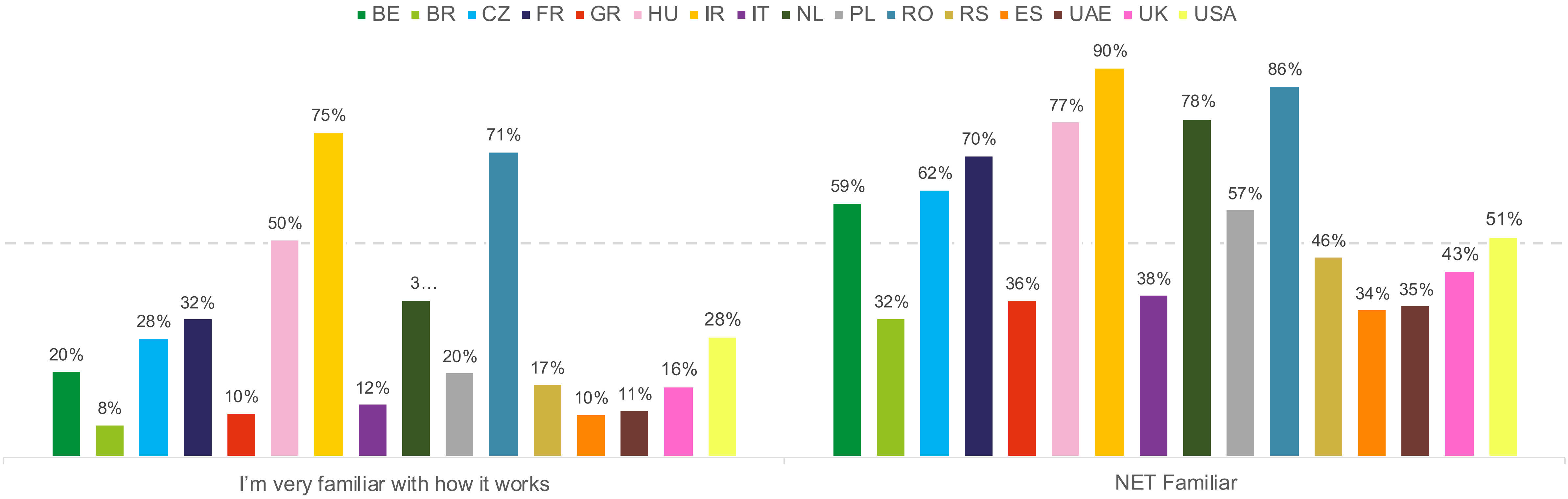
Net familiar with DRS by age



DRS FAMILIARITY – BY COUNTRY

Familiarity with Deposit Return Schemes (DRS) varies sharply across markets. Countries where schemes are already in place such as Ireland (90%), Romania (86%), the Netherlands (78%) and Hungary (77%), record the highest awareness, even though depth of knowledge differs (in the Netherlands only 36% say they are 'very familiar,' compared with 75% in Ireland).
In contrast, familiarity falls to around one in three in markets like Brazil or Spain. Interestingly, some non-DRS countries, including France, Czech Republic, Greece, Belgium and Poland, still show high net familiarity, suggesting awareness travels beyond direct experience.

How familiar are you with the idea of a Deposit Return Scheme (DRS) in your country — whether it's currently in place, being planned, or has been discussed?



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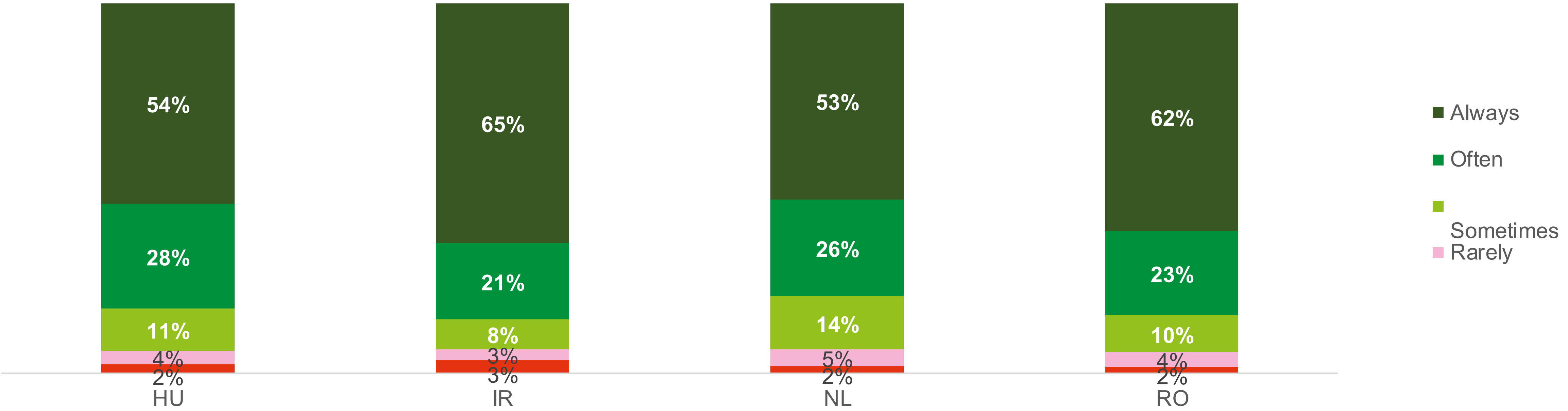
DRS PARTICIPATION – BY DRS COUNTRY

Participation in Deposit Return Schemes is very high in all markets where they operate. A majority say they always take part. Levels of non-participation are minimal across all four countries (2–5%), underlining that once schemes are in place, they quickly become part of consumers' everyday behaviour.

How often, if at all, do you participate in the Deposit Return Scheme?
Showing markets with DRS: Hungary, Ireland, the Netherlands and Romania



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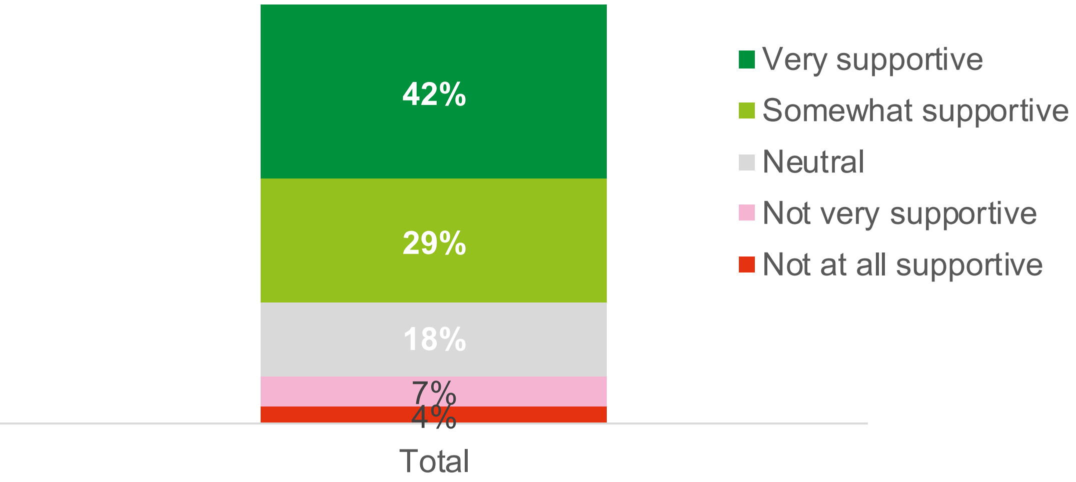
DRS SUPPORT - OVERALL

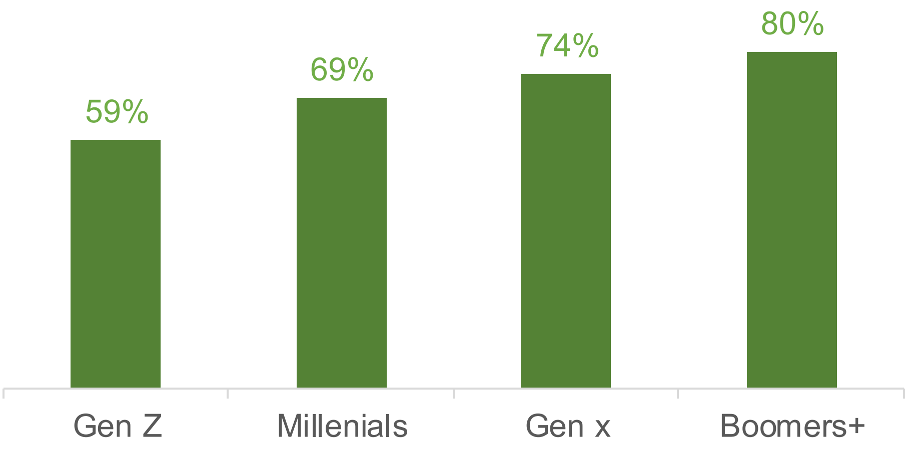
Support for Deposit Return Schemes (DRS) is strong overall, with 71% net supportive — including 42% who are 'very supportive.' Only a small minority (11%) oppose the idea. Support grows steadily with age: from 59% among Gen Z to 80% among Boomers+, suggesting older generations are the most convinced of the benefits. Younger groups are more likely to be neutral or hesitant, indicating an opportunity for education and engagement to build stronger buy-in.

How supportive are you of a Deposit Return Scheme (DRS) on drink containers in your country, where you pay a small refundable deposit and get it back when you recycle the container?

Net supportive
71%



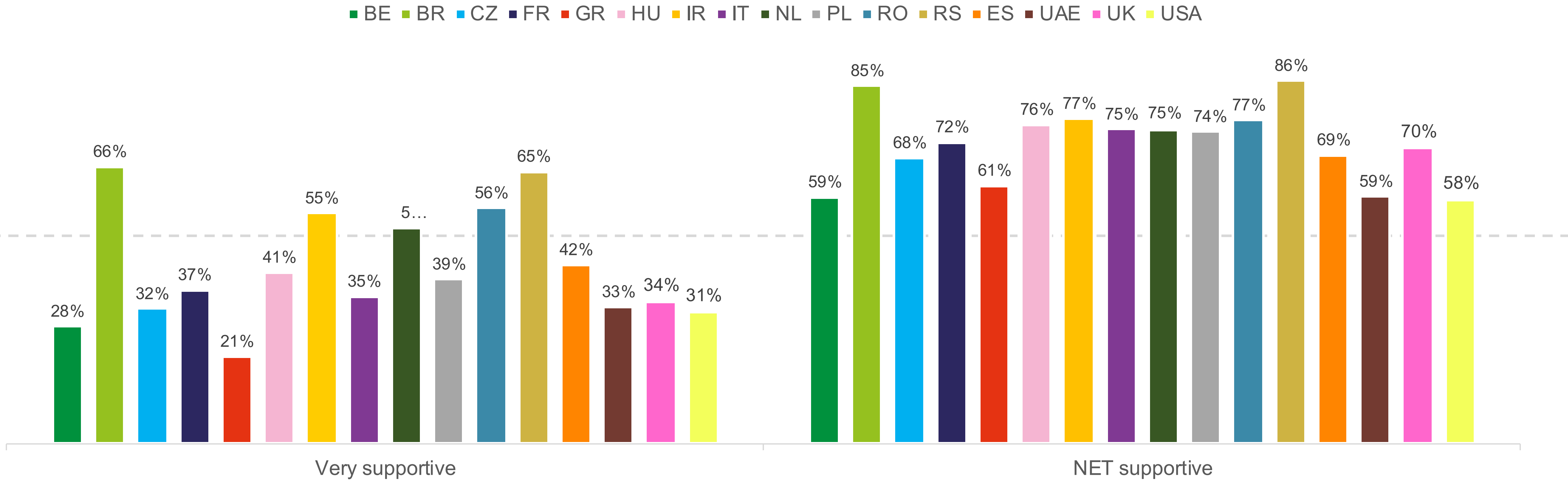
Net support for DRS by age



DRS SUPPORT – BY COUNTRY

A majority supports Deposit Return Schemes (DRS) in all markets, but the intensity of support varies considerably. Net support ranges from 58% in the USA to 86% in Serbia, with Brazil also very high at 85%. A strong cluster of countries, including Ireland and Romania (77%), the Netherlands and Italy (both 75%), and Poland (74%), sit comfortably in the mid-to-high 70s. Even in lower-scoring markets such as Belgium (59%), UAE (59%) and Greece (61%), a clear majority remain supportive. Levels of strong, 'very supportive' sentiment show sharper contrasts. Brazil (66%), Serbia (65%), Romania (56%), Ireland (55%) and the Netherlands (51%) stand out as markets with a majority of strong supporters. At the other end of the spectrum, Greece (21%), Belgium (28%), the USA (31%), Czech Republic (32%) and the UK (34%) record the lowest intensity.

How supportive are you of a Deposit Return Scheme (DRS) on drink containers in your country, where you pay a small refundable deposit and get it back when you recycle the container?



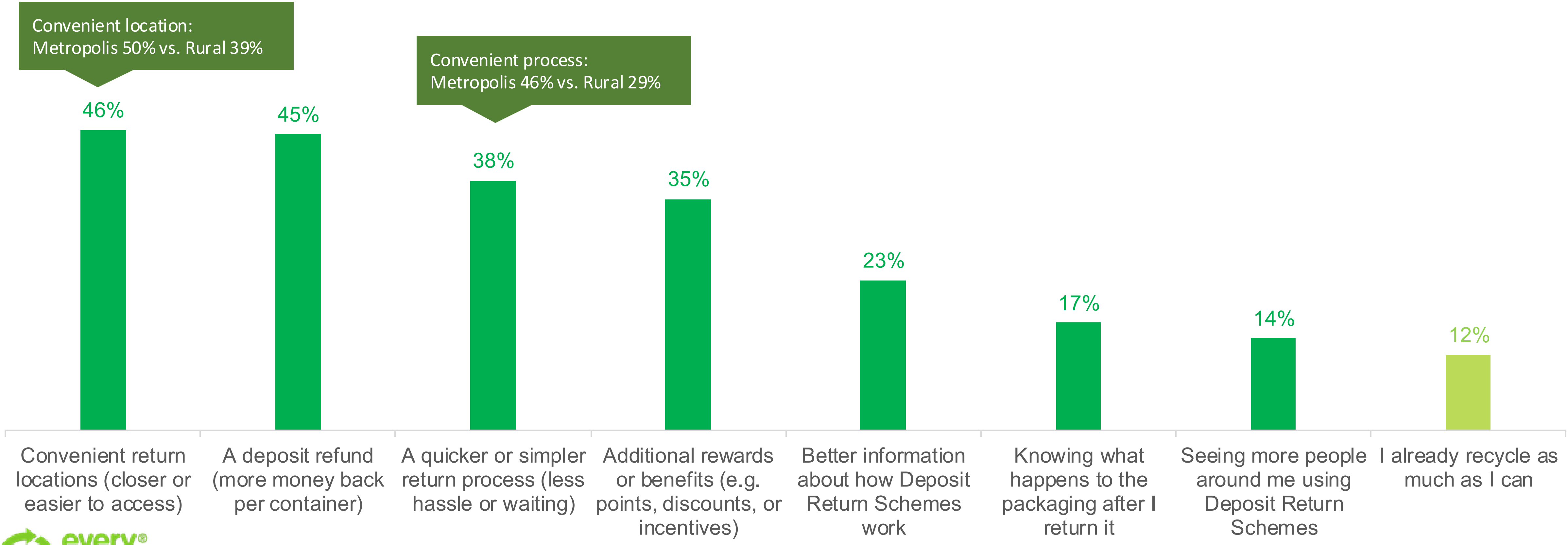
ECC 2025 – N: 16,195

BE: 1,026 · BR:1,017 · CZ:1,002 · FR:1,018 · GR: 1,013 · HU 1,015 · IR : 1,012 · IT: 1,006 · NL: 1,005 · PL: 1,011 · RO: 1,013 · RS: 1,021 · ES 1,005 · UEA 1,015 · UK: 1,004 · US: 1,012

ENCOURAGEMENT TO USE DRS - OVERALL

Nearly half of consumers say they would be encouraged by convenient return locations (46%) or by higher deposit refunds per container (45%). Process improvements also matter, with 38% wanting a quicker, simpler return experience. A further 35% would be motivated by added benefits such as discounts or rewards. By contrast, softer drivers rank much lower: only 23% want more information about how DRS works, 17% want to know what happens after return, and fewer than 15% are influenced by others' behaviour or feel they already recycle enough. Notably, convenience has a stronger pull in metropolitan areas, where 50% cite location and 46% cite process as motivators, compared with 39% and 29% in rural areas.

What, if anything, could encourage you to return empty packaging, such as drink cans or bottles, via the Deposit Return Scheme (DRS)?



every can counts

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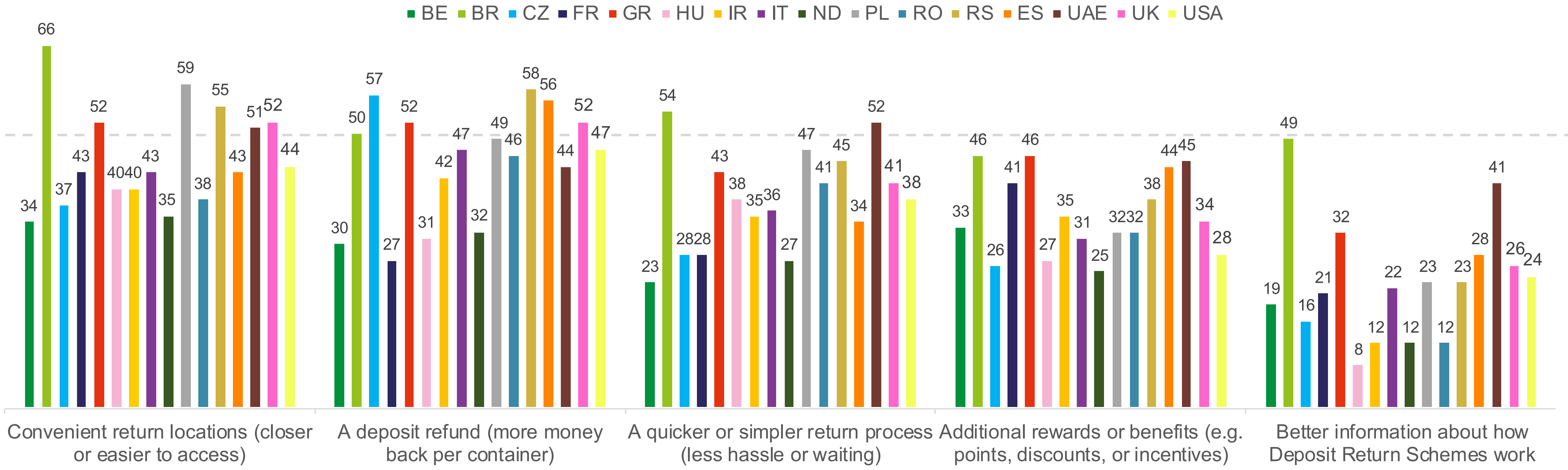
ENCOURAGEMENT TO USE DRS – BY COUNTRY

Convenience and incentives are the top drivers overall while information is generally a weaker motivator, but the mix differs by market. Brazil scores high across almost every lever, from convenient return locations and higher refunds to simpler processes and better information. The UAE shows a similar pattern, with a particular emphasis on quicker, simpler returns and strong interest in clearer information. By contrast, higher deposit refunds are most influential in the Czech Republic and Spain (also valuing additional rewards and benefits), while Serbia and Greece balance convenience and refunds more evenly.

What, if anything, could encourage you to return empty packaging, such as drink cans or bottles, via the Deposit Return Scheme (DRS)? Showing top 5, in percentages



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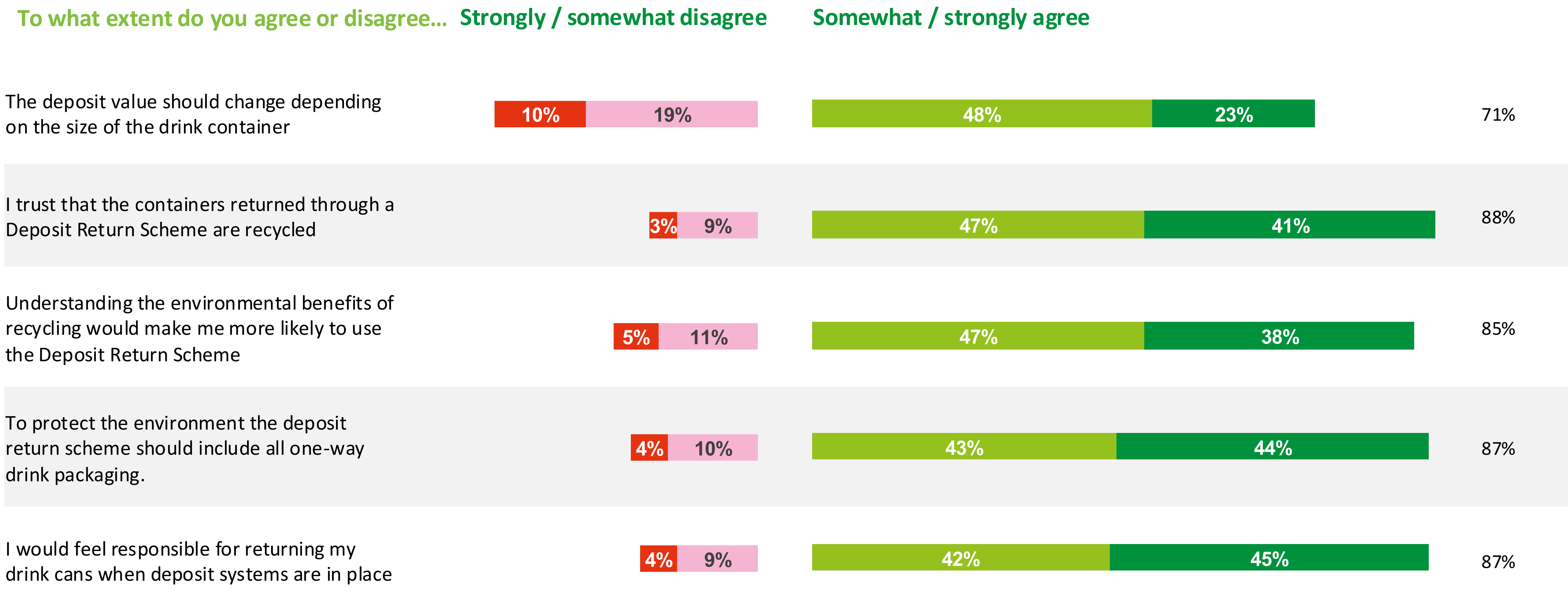
DRS STATEMENTS - OVERALL

Trust in DRS is high, and most consumers support broad, inclusive schemes. Close to 9 in 10 agree that returned containers are recycled, that all one-way packaging should be included, and that they would feel personally responsible for returning their cans. Environmental understanding is also a strong motivator. Variable deposit values by container size receive comparatively less support but is seen favourably by a large majority.



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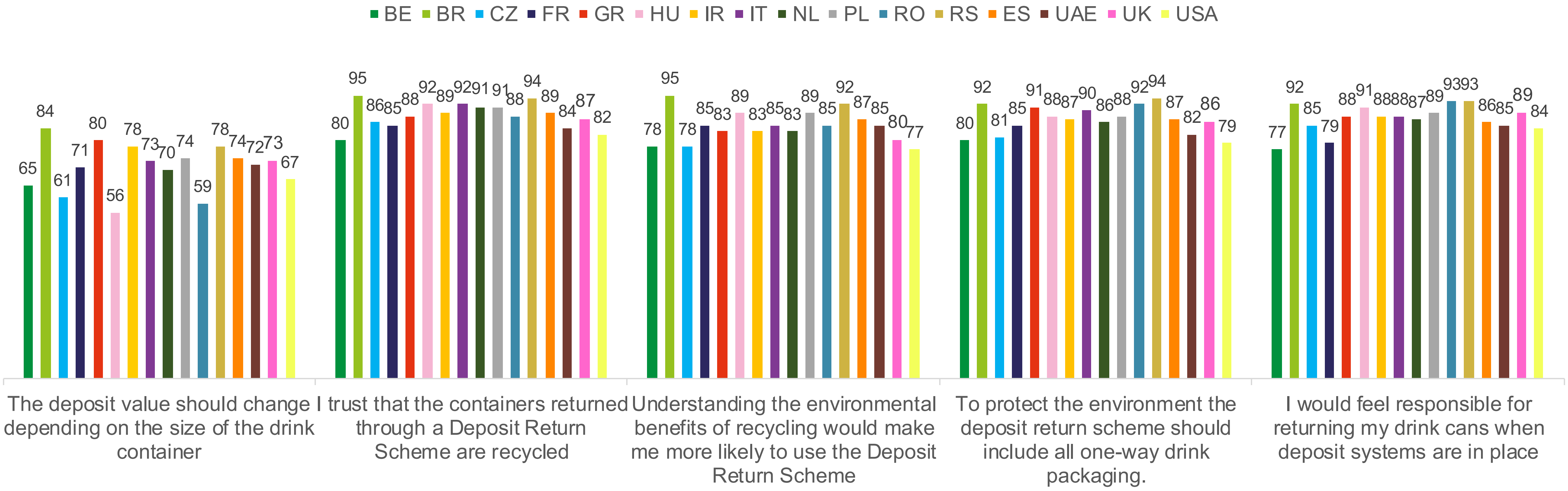
DRS STATEMENTS - BY COUNTRY

Support for DRS principles is consistently strong across all markets, with large majorities agreeing on trust, environmental benefits, and personal responsibility. The main point of difference is on whether deposit values should vary by container size: Brazil and Greece show highest agreement, while Hungary and Romania, who have DRS in place — are less enthusiastic. Conversely, Ireland and the Netherlands who also have DRS in place show higher support for a change in value with size.

To what extent do you agree or disagree…
Showing net agree in percentages



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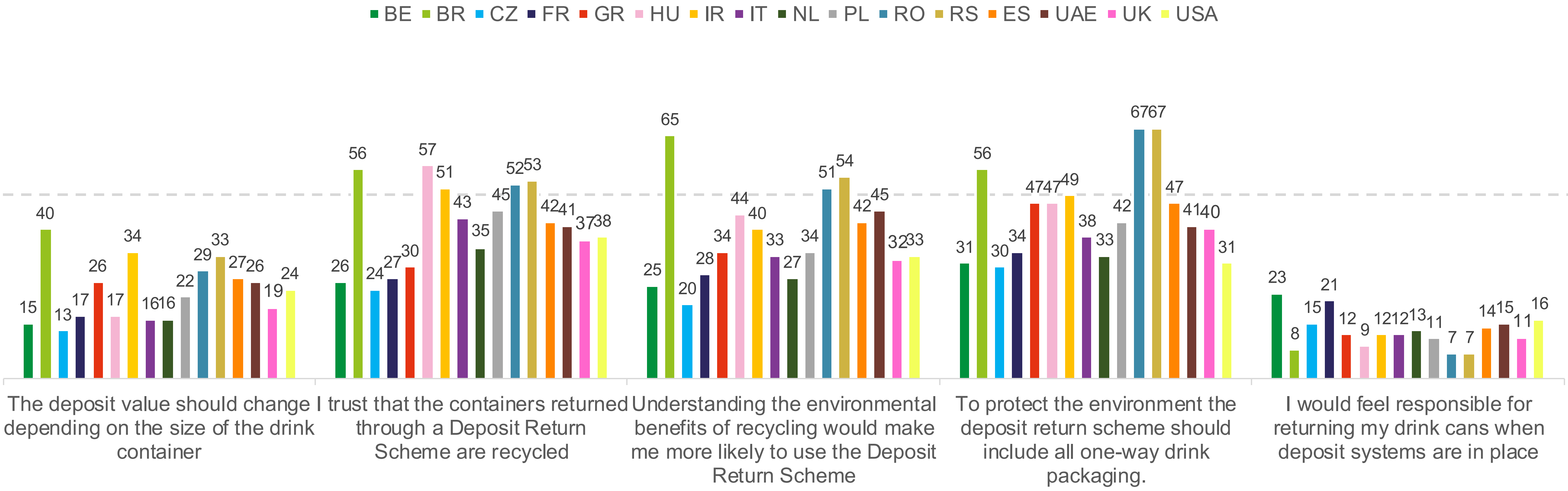
DRS STATEMENTS - BY COUNTRY

When looking only at those who 'strongly agree,' support levels show sharper contrasts. Romania and Serbia stand out with strong calls for all one-way packaging to be included (67%). Brazil scores high across most categories but is weaker on personal responsibility for returning cans. Hungary, Ireland, Romania and Serbia show high trust that returned containers are recycled, while trust is lower in the Czech Republic, Belgium France or Greece. Overall, consumers feel less strongly about variable deposit values or about personal responsibility, with these measures attracting far fewer strong supporters.

To what extent do you agree or disagree…

Showing strongly agree in percentages



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THANK YOU

APPENDIX

Sample structure:
Gender
Age
City size

SAMPLE STRUCTURE: GENDER

	TOTAL	Belgium	Brazil	Czech Republic	France	Greece	Hungary	Ireland	Italy	Netherla nds	Poland	Romania	Serbia	Spain	UAE	UK	USA
Nb of respondents	16195	1026	1017	1002	1018	1013	1015	1012	1006	1005	1011	1013	1021	1005	1015	1004	1012
Male	50%	49%	49%	48%	49%	49%	47%	49%	49%	50%	48%	49%	47%	49%	66%	49%	49%
Female	50%	51%	51%	51%	51%	50%	52%	51%	51%	50%	52%	51%	50%	50%	33%	51%	50%
Self-describe	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Prefer not to say	1%	0%	0%	0%	1%	0%	1%	0%	0%	0%	0%	0%	3%	0%	1%	0%	0%

every can counts®

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SAMPLE STRUCTURE: GENDER

	TOTAL	Belgium	Brazil	Czech Republic	France	Greece	Hungary	Ireland	Italy	Netherlands	Poland	Romania	Serbia	Spain	UAE	UK	USA
Nb of respondents	16195	1026	1017	1002	1018	1013	1015	1012	1006	1005	1011	1013	1021	1005	1015	1004	1012
Gen-Z (16-28)	18%	17%	27%	15%	17%	14%	15%	20%	13%	17%	17%	14%	17%	13%	29%	20%	21%
Millennials (29-44)	29%	25%	35%	29%	24%	25%	28%	31%	23%	25%	29%	29%	28%	27%	51%	25%	27%
Gen X (45-60)	29%	30%	24%	31%	27%	39%	31%	31%	32%	28%	26%	30%	38%	32%	17%	26%	27%
Baby Boomers (55-74)	24%	28%	14%	25%	32%	22%	26%	18%	33%	30%	28%	27%	17%	28%	2%	29%	26%

SAMPLE STRUCTURE: CITY SIZE

	TOTAL	Belgium	Brazil	Czech Republic	France	Greece	Hungary	Ireland	Italy	Netherla nds	Poland	Romania	Serbia	Spain	UAE	UK	USA
Nb of respondents	16195	1026	1017	1002	1018	1013	1015	1012	1006	1005	1011	1013	1021	1005	1015	1004	1012
A metropolis (more than 1 million people)	19%	8%	45%	11%	11%	36%	21%	11%	14%	4%	11%	20%	18%	20%	51%	10%	14%
A city (100,000 to 1 million people)	28%	19%	36%	20%	21%	29%	18%	22%	22%	32%	35%	29%	31%	34%	31%	27%	36%
A town or small city (1,001 to 100,000 people)	41%	54%	17%	49%	47%	31%	46%	44%	59%	51%	38%	37%	41%	41%	15%	48%	40%
A village / rural (1,000 people or less)	12%	19%	2%	20%	21%	5%	15%	23%	5%	13%	16%	14%	10%	5%	3%	15%	11%

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