Pulp-molded packaging on EU supermarket shelves:

cross-country insights and growth potential

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Sustainable by design

Insights across Europe

Growth with potential

PACKAGING MARKET TRANSFORMATION

POLICY IS CHANGING. STORE SHELVES ARE NOT

MOLDED FIBER: EARLY MARKET PENETRATION

1. Razors

2. Toothbrush

3. Sauce Tubes

FRESH

PACKAGING OPTION FOR FRESH CATEGORY ACCORDING TO ECOLIGICAL RATING

1. Pulp molded

(Recycled fiber)

2. Corrugated board

(Mostly recycled fiber)

3. Folding boxboard

(Mainly virgin fiber, with recycled fiber used where applicable)

4. Formed paper

(Virgin fiber)

5. Plastic

PET
PVC
PP
PS
EPS
HIPS

Trend on deforestation – moving away from virgin materials

PPWR = packaging and packaging waste regulation

SUPERMARKET ASSESSMENT – OVERALL PICTURE

62 STORES ACROSS 6 COUNTRIES

Packaging share by sq. metres of fresh produce shelf space • May 2025 – March 2026

62
stores audited
20 retail chains

6
countries
across Europe

1 907
sq.m analysed
fresh produce shelf

51%
Plastic dominance
+ Plastic (trays, nets & bags)
Plastic Retail Packaging (PRP) + Polystyrene

Plastic Retail Packaging (PRP)	36%	691 m²
Bulk / Loose (BL)	28%	537 m²
Plastic (trays, nets and bags) (PL)	15%	284 m²
Corrugated cardboard (CC)	9%	168 m²
Pulp Trays (PT)	6%	119 m²
Formed Paper (FP)	5%	89 m²
Pulp Retail (PR)	1%	19 m²

Pulp Trays + Pulp Retail: 7% | 138 m²

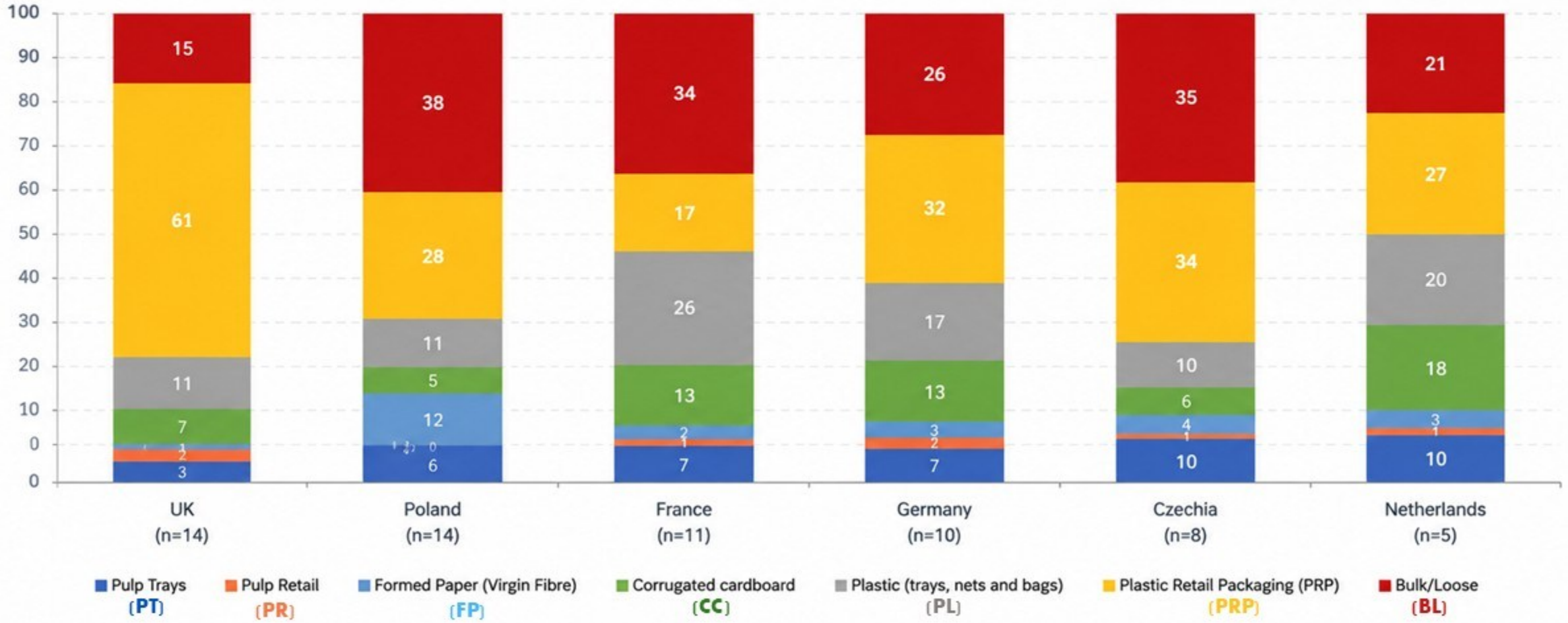
Plastic total: 51% | 975 m²

CROSS-COUNTRY COMPARISON

SAME CATEGORY – VERY DIFFERENT REALITIES

Shelf space by packaging type, % of sq.m • 62 stores, 6 countries

UK: highest Plastic Retail Packaging (PRP) (61%), Netherlands: highest Corrugated cardboard (18%), Poland: highest Formed Paper (Virgin Fibre) (13%), Pulp Trays highest in Czechia (10%) & Netherlands (10%).



Let’s build
a sustainable future.

Together.

Make the right choices.
Choose sustainable materials.

Drive real impact.
Reduce deforestation and waste.

Stronger together.
For people. For planet. For tomorrow.

Join us in making sustainable packaging the standard.

EMPPA
EUROPEAN MOULDED PULP PRODUCERS ASSOCIATION