



CII-ITC Centre of Excellence
for Sustainable Development



Confederation of Indian Industry



Executive summary

Understanding consumer perception
on plastic packaging and waste in urban India

Study conducted by



This study was supported by



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Executive summary

The study, commissioned by the Confederation of Indian Industry (CII) as part of the India Plastics Pact initiative and conducted by Nielsen IQ, offers a comprehensive exploration of consumer attitudes, behaviours, and preferences surrounding plastic packaging and sustainable alternatives. The research uses a dual-method approach – qualitative in-depth interviews and a large-scale quantitative survey covering 1,034 respondents across four metropolitan cities – Delhi, Mumbai, Kolkata, and Bengaluru and their surrounding urban areas. It reveals critical insights into India's evolving landscape of environmental consciousness, packaging expectations, and behavioural readiness for sustainability.

Packaging as a purchase driver and environmental cue

Consumers today see packaging not merely as functional but as a powerful indicator of product quality, brand values, and environmental responsibility. The study finds that a vast majority (84%) place high importance on packaging in their purchase decisions. This importance is especially strong in Delhi and Kolkata, where packaging often serves as a cue for product quality and trust. Key attributes such as durability, ease of use, and brand recognition dominate preferences, but environmental friendliness is also gaining ground – particularly among NCCS C¹ consumers, challenging the notion that

sustainability is only a concern of premium buyers.

Material preferences reflect this balance of pragmatism and environmental aspiration. Plastic remains the most used packaging, favoured for its water-resistance and cost-effectiveness, especially in food staples, personal care, and cleaning products. However, many consumers are also aware of plastic's environmental harm – 59% associate it with environmental damage and 53% with health hazards. Meanwhile, materials such as paper (for snacks and dry goods), glass (for beverages and toiletry items), and biodegradable packaging² are increasingly being considered viable substitutes, depending on product category and usage context.

Trust, curiosity, and skepticism in label engagement

One of the more nuanced findings of the study comes from analysing consumers who actively look for sustainability information on packaging. Among respondents who reported “Always” or “Often” checking for recycled content (N=593), there is a coexistence of positive engagement and skepticism. While 81% report curiosity and 79% express trust in brands that claim use of recycled content, a significant 60% also express doubt about the credibility of such claims.

This indicates that while consumers are becoming more engaged with sustainability messaging, trust is not absolute – even among the most attentive segments. For many, label engagement is tempered by a lack of visible verification or credible

¹ According to the New Consumer Classification System by the Media Research Users Council India. Available at [Media Research Users Council - New Consumer Classification System](#). Accessed on 28 October 2025.

² Considered as viable alternatives by consumers. Biodegradable as notified by the Bureau of Indian Standards IS 17899 T:2022.

standards. This underscores the importance of transparent, third-party verified labelling, visible certification marks, and consistency in sustainability claims, which together can bridge the gap between curiosity and brand loyalty.

Packaging with recycled content and compostable packaging: awareness, confusion, and action gaps

Awareness of alternatives such as compostable or biodegradable plastic is growing, with 62% of respondents indicating familiarity. However, purchase behaviour lags, with only 48% reporting having bought such products. Similarly, 58% report having purchased packaging labeled as containing recycled plastic, and this uptake is largely concentrated among NCCS A¹ and urban consumers.

Conceptual clarity is also a challenge – many consumers confuse compostability with recyclability, and 59% incorrectly believe that compostable plastics can be recycled like conventional plastic. This misperception is more common in Delhi and Bengaluru, pointing to the need for better public education and simplified communication around sustainability terminology.

Qualitative insights reinforce above patterns: while awareness is high, skepticism about quality, hygiene, and durability of recycled packaging persists, particularly for food and personal care products. Consumers seek reassurance through visual cues, clear symbols, and familiar brand names before trusting sustainable packaging claims.

Sachet usage: high utility, low awareness

Sachets are almost ubiquitous in Indian households. 89% of consumers have purchased a sachet at some point with 36% being regular users, especially in NCCS B¹ and C households in Mumbai and Bengaluru. While widely adopted for affordability, portability, and single-use convenience, sachets are also perceived through a contradictory lens – 57% consider them environmentally friendly, and 74% state they would prefer sachets made from recycled plastic. However, only 55% are willing to pay more, and affordability remains a core concern.

Cross-tabulations show that perception of sachets' environmental impact varies sharply by geography and NCCS¹. Among those who view them as problematic, top concerns include littering, difficulty in collection, and lack of proper disposal mechanisms. While there is willingness to shift to eco-friendly sachets, price remains a key determinant – only 23% are willing to pay 10% more, and just 10% would consider a 50% premium.

Refill and return models: emerging acceptance

The study identifies strong conceptual support for refill and return models, particularly for pantry staples, household cleaning products, and edible oils. Refill-at-home is the most familiar and practiced model, while store-based refill (refill-on-the-go) and return-at-store models are still nascent in awareness but well-received when explained. Hygiene, trust, and convenience are seen as pre-requisites for scale-up, and qualitative feedback highlights that evolved urban consumers show significant openness – provided

infrastructure and pricing align with expectations.

Waste segregation: a keystone behaviour with systemic barriers

Waste segregation emerges as a keystone behaviour, practiced always by 46% and sometimes by another 35% - particularly in cities like Mumbai and Bengaluru. Cross-tabulations with the COM-B (Capability, Opportunity, Motivation, Behaviour) framework show that households that consistently segregate:

- Are more likely to engage in other sustainable behaviours, such as using refills, checking labels, and properly disposing plastic waste.
- Display higher awareness of recyclable materials and special collection drives.
- Are motivated by community norms, family influence, and civic responsibility.
- Are more likely to report satisfaction with local waste systems and feel responsible for environmental outcomes.

However, systemic gaps remain. Even willing households face irregular collection services, lack of bins, and poor follow-through from municipalities. Among non-segregators, belief that “it makes no difference because waste is mixed later during collection” acts as a significant demotivator.

Building trust in the end-to-end system and visibly showcasing positive local outcomes will be essential to drive sustained behavioural adoption.

Belief in environmental impact drives behaviour change

A particularly revealing insight arises from the analysis of belief-action alignment in

sustainable shopping. Among those who strongly believe their individual efforts make a difference, there is a clear preference for tangible, habitual improvements.

Conversely, those with weaker convictions about personal impact are more inclined toward symbolic or passive actions, such as buying recyclable products or supporting eco-friendly brands. This finding strongly reinforces the importance of reinforcing belief in personal efficacy through storytelling, norm-based communication, and community engagement. Tangible cues and visible feedback loops – such as neighborhood cleanliness or community recognition – can help convert ambivalent intent into committed action.

Label reading and media channels: opportunity for influence

Consumers are increasingly attentive to packaging labels, especially NCCS A¹. However, visibility and credibility of sustainability information remain inconsistent. Consumers who actively engage with labels seek:

- Clear icons
- Certifications or quality marks
- Trustworthy cues like QR codes or endorsements

Skepticism coexists with curiosity – indicating that while awareness is high, label design and validation need strengthening to reinforce consumer trust.

TV and social media remain the most effective communication platforms, with significant influence observed in both current usage and preferred channels. Traditional formats such as newspapers and posters still play a role in peripheral regions and NCCS C¹. Peer influence,

educational institutions, and municipal campaigns also shape consumer understanding – highlighting the need for multi-platform, regionalized communication strategies.

Conclusion: bridging belief, behaviour, and systems

The Indian consumer is increasingly aware and selectively engaged in sustainability-related behaviours. Urban and higher-NCCS¹ consumers show stronger intent and willingness to pay premiums for greener products, but barriers around trust, affordability, and system reliability continue to limit scale. Notably, NCCS C¹ consumers are not disengaged – they are environmentally concerned but constrained by infrastructure, cost, and informational gaps.

To accelerate the transition toward sustainable packaging and consumption, stakeholders must:

- Design credible, affordable, and well-communicated alternatives, especially sachets and daily-use items
- Make sustainable options accessible by scaling better packaging design, new delivery models, and labelling
- Invest in system-level transparency, showing consumers that their efforts – like segregation – truly make a difference
- Leverage trust, peer norms, and belief in efficacy to influence mainstream behaviours
- Reinforce keystone behaviours such as label-checking, waste segregation, and reuse habits through reward, recognition and reinforcement

----- *End of summary* -----

Methodology

To comprehensively capture consumer perceptions and behaviors regarding plastic packaging in urban India, a modular approach was adopted, combining a qualitative and quantitative module (described below).

Qualitative module

The qualitative phase was designed to develop an in-depth understanding of consumer perceptions, knowledge, and attitudes concerning plastic packaging, recycling, and reuse. Insights from this phase were critical in shaping the structure and content of the quantitative survey.

- Method: In-Depth Interviews (IDIs) conducted at respondents' homes
- Duration: Each interview lasted approximately 120 minutes
- Purpose
 - Capture authentic consumer behavior and attitudes without external influence
 - Observe waste segregation/recycling/reuse practices in real-life settings
- Sample
 - Geography: Metro cities – Delhi, Mumbai, Kolkata, Bangalore, Chennai (metropolitan cities and surrounding urban areas)
 - Respondent profile
 - Age: 18 to 45 years
 - Gender: equal male-female split
 - Socio-economic class (NCCS)¹: A, B, and C
 - Segmentation: 70% Mainstream consumers, 30% Evolved consumers
 - Number of in-depth interviews - 40

Quantitative module

The quantitative phase built upon the findings from the qualitative study to validate and generalize the key insights across a wider and more diverse population. It provided statistically robust data to guide strategic recommendations.

- Method: face-to-face interviews using Computer-Assisted Personal Interviewing (CAPI) in local languages
- Instrument: structured questionnaire primarily consisting of close-ended questions
- Sample size: 1,000 respondents across four metro cities and surrounding urban areas

- Sampling approach
 - Area-based purposive sampling with four to five starting points per city
 - Systematic household selection using the right-hand rule
- Respondent profile
 - Age: 18 to 60 years
 - Gender: equal male-female split
 - Socio-economic class (NCCS)¹: A, B, and C
- Interview duration: approximately 20 minutes per respondent



The India Plastics Pact (IPP), a CII initiative, was launched in 2021 and unites businesses, governments, NGOs and citizens to create a circular economy for plastic packaging in India. The CII-ITC Centre of Excellence for Sustainable Development (CESD) anchors the India Plastics Pact, within CII. The work of the Pact covers all plastic resins at all stages of the plastics packaging value chain. The India Plastics Pact is the first Plastics Pact in Asia and part of a global network of 13 Plastics Pacts. As of September 2026, 55 organisations were signatories to the India Plastics Pact.

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Confederation of Indian Industry

The Confederation of Indian Industry (CII) works to create and sustain an environment conducive to the development of India, partnering Industry, Government and civil society through advisory and consultative processes.

For more than 130 years, CII has been engaged in shaping India's development journey and works proactively on transforming Indian Industry's engagement in national development. With its extensive network across the country and the world, CII serves as a reference point for Indian industry and the international business community.

In the journey of India's economic resurgence, CII facilitates the multifaceted contributions of the Indian Industry, charting a path towards a prosperous and sustainable future. With this backdrop, CII has identified "Accelerating Competitiveness: Growth, Resilience, Inclusion, Sustainability, Trust" as its theme for 2026-27, prioritising five key pillars. During the year, CII will align its policy advocacy, institutional initiatives, partnerships, and outreach to support Indian industry in strengthening these five interconnected pillars of competitiveness.

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**CII-ITC Centre of Excellence
for Sustainable Development**

The CII-ITC Centre of Excellence for Sustainable Development (CESD) is the ecosystem creator for sustainable development in India. As a 20-year-old Industry-led institution within CII, the Centre drives sustainable, environmental, inclusive and climate-friendly transformation among stakeholders through research, data-driven digital tools, frameworks, collaborative initiatives and capacity development.

CESD works towards bringing local and global macro challenges to the centre stage; building policy consensus on critical issues; strengthening stakeholders' awareness and representation on policy & regulatory reforms and enabling actions that positively impact the environment, nature and communities.

With a vision to drive transformation towards sustainable development, CESD continues to play a focal role in Government-Industry dialogues on national regulations; articulating stakeholders' discourse on global policies; putting forth Indian Industry's stand on macro-economic issues and accentuating the need for sustainable and inclusive transformation.

CESD focuses on six transformational pathways: Advancing Creation of a Circular Economy; Facilitating an Enabling Ecosystem for ESG Reporting; Accelerating Nature Positive Actions; Enhancing Solutions for Clean Air; Building Climate Resilience and Low-Carbon Economy and Fostering Dialogues, Engagements & Knowledge Exchange.

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