



Home Care Packaging in Germany

October 2025

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KEY DATA FINDINGS

2024 DEVELOPMENTS

Refill packs, pouches and e-commerce boost home care packaging unit volumes in Germany 2025
Introduction of recyclable 2-litre refillable pouches in Germany's home care market
Leading pack type folding cartons continues to gain share in spray/aerosol fresheners

PROSPECTS AND OPPORTUNITIES

Rising demand for mid-sized and refill packs will boost home care packaging in Germany
HDPE bottles seeing declining demand in hand dishwashing as lighter pack types gain favour

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EXECUTIVE SUMMARY

Packaging in 2024: The big picture
2024 key trends
Sustainability and health demands drive a shift towards portion-controlled, paper-based food packaging
Eco-innovation and consumer trends drive shift to recyclable and smart packaging formats
Regulatory pressure accelerates adoption of lightweight and recyclable alcohol packaging
Eco-friendly materials and refill solutions drive innovation in beauty packaging
Refillable, recyclable and concentrated formats transforming home care packaging
Demand for convenience and sustainability fuels rise of pouches and eco-friendly pet food packaging

PACKAGING LEGISLATION

EU PPWR regulatory mandates drive costly redesigns and spur sustainable packaging innovation
Recycled content obligation raises material costs and pushes affordable design strategies
Stricter recyclability standards prompt early design changes and competitive differentiation

RECYCLING AND THE ENVIRONMENT

Regulatory pressure drives recyclable packaging adoption
Legal mandates and incentives accelerate reusable packaging uptake
Material innovation responds to sustainability demands
Table 1 - Overview of Packaging Recycling and Recovery in Germany: 2022/2023 and Targets for 2024

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