The Refill Opportunity in Beauty and Personal Care

New European consumer research on refill habits, expectations, and barriers to adoption of refillable packaging.



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THE REFILL OPPORTUNITY IN PERSONAL CARE

New consumer research reveals what European shoppers really want from refill packaging, and where brands can gain an edge.

Refill packaging in personal care has moved beyond early adoption.

Sustainability is playing a bigger role in purchase decisions than ever. A consumer research* shows that 77% of European consumers now view reusable packaging positively – a clear signal that circular formats have moved well beyond a niche audience.

At the same time, the EU's Packaging and Packaging Waste Regulation (PPWR) is pushing brands toward waste reduction, recyclability, and circular systems. For personal care brands, this creates opportunity: offer refills now, and you can meet regulatory requirements while delivering what consumers already want.

But what do consumers think about refill packaging today? What formats are they buying, what motivates those purchases, and what's getting in the way?

To find out, Amcor conducted a study across six European markets. The findings paint a clear picture of how refill habits are evolving and where the biggest opportunities lie.



METHODOLOGY

About this research

Amcor conducted quantitative consumer studies in April 2026, covering shower/bath products, haircare, and handwash liquid soap. The fieldwork surveyed 2,749 respondents across France, Germany, Italy, Poland, Spain, and the UK – all were buyers of the category and of refills within that category in the past 12 months.

Results in this eBook are consolidated across all three studies.

2,749
respondents

(*) Research conducted by by Stora Enso, involving more than 7,000 consumers

HOW CONSUMERS BUY REFILLS TODAY

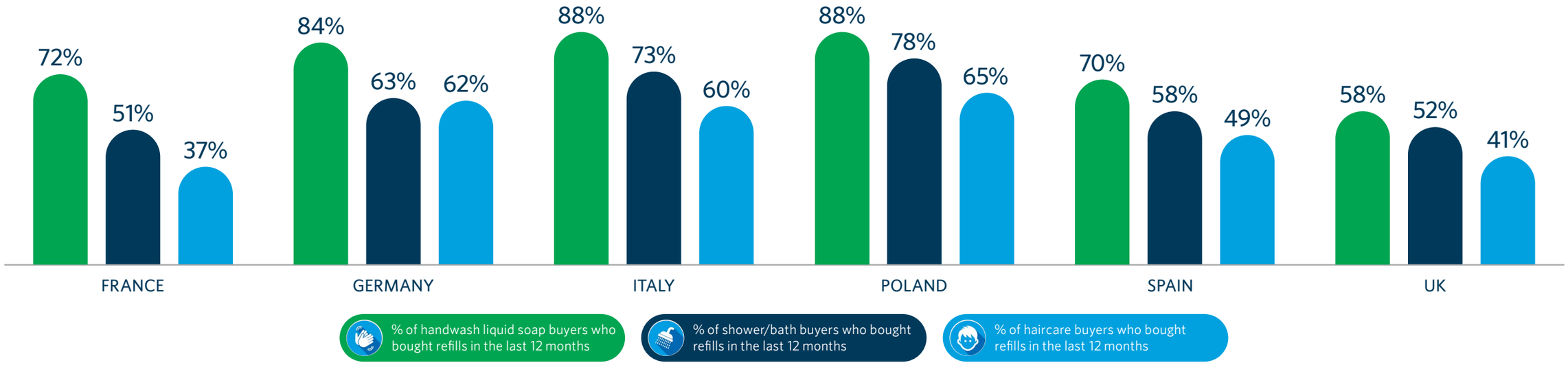
Flexible refill pouches are the clear favorite – but price, availability, and ease of use will determine how fast the market grows.

Across Europe, handwash leads refill adoption in personal care, followed by shower/bath and then haircare.

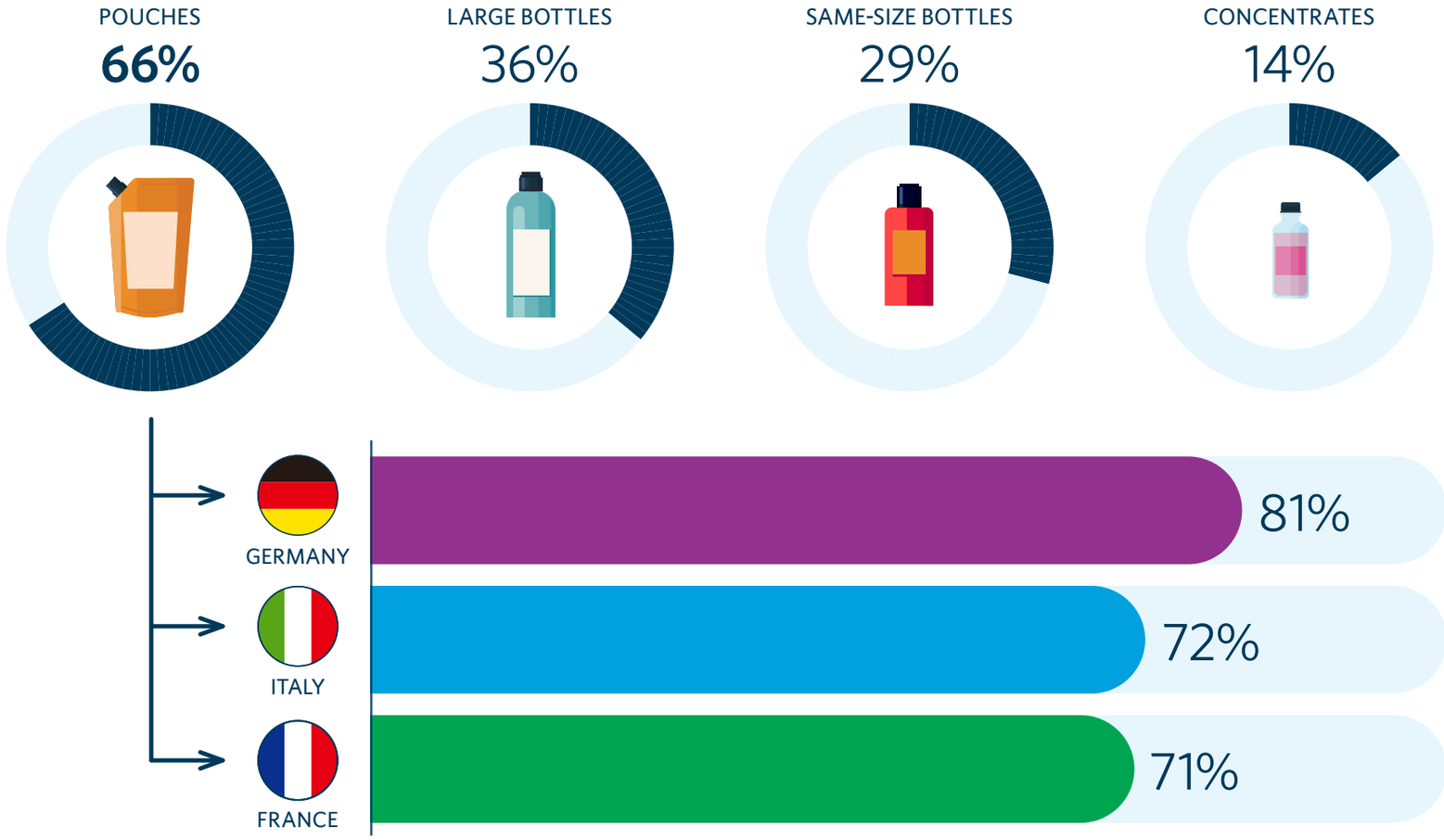
75% of handwash liquid soap buyers have bought refills in the last 12 months, while that number is 61% for shower/bath products buyers.



Adoption rates of personal care refills per category and country among refill buyers



Preferred refill formats



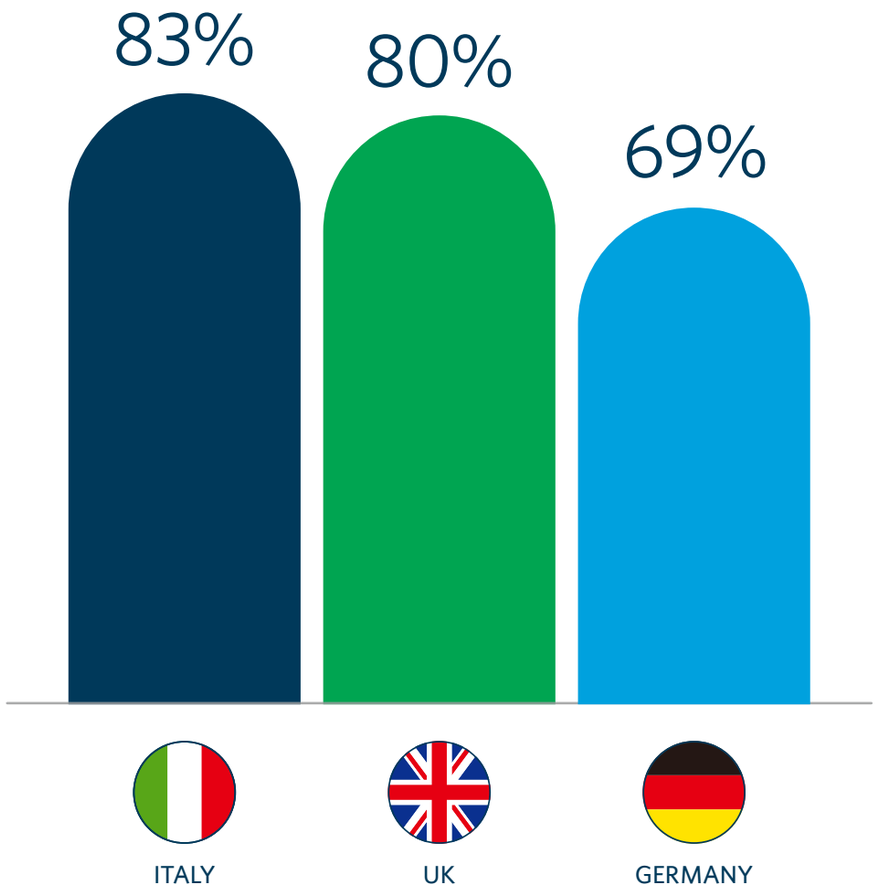
The formats consumers choose

As consumers increasingly incorporate refill systems into their everyday routines, **flexible refill pouches have emerged as the leading format, with 66% of European consumers reporting purchasing one within the last 12 months.** This is particularly high in Germany, Italy and France.

Larger refill bottles score second place (36%), with an even higher uptake in places like the UK, and among consumers aged 18-34 where that rises to 46%. These are closely followed by same-size refill bottles (29%), while concentrated refills remain a more niche concept at 14%.

The dominance of pouches isn't surprising. They're lightweight, easy to store, and efficient to transport – and they represent a significant material reduction compared to heavier alternatives, which matters as sustainability targets tighten and Extended Producer Responsibility (EPR) fees come into consideration.

Consumers actively look at price per ml or liter when buying refills



THE PRICE AND VALUE EQUATION

Price stands out as the dominant motivator to buy more refills.

86% of respondents expect refills to cost less than the original product – a near-universal expectation that shapes every refill purchase. And this isn't just a passive assumption as 75% said they actively compare the price per milliliter or liter when buying, making unit price a deliberate part of the decision.

For 65%, price is the single most important criterion when choosing a refill. In fact, **69% cite lower prices as the single strongest incentive to buy more refills in the future.**

This is because a well-designed refill system is inherently more efficient than a single-use cycle. The original packaging is purchased once and reused; consumers then pay only for the refill product, reducing cost per cycle while maintaining the premium look and feel of the original packaging.



say lower prices would incentivize them to buy more, making affordability the #1 growth driver.

WHERE SUSTAINABILITY AND VALUE CONVERGE

Sustainability and price both play a significant role, and consumers aren't choosing one over the other.

81% of respondents say they are more likely to buy refills if the packaging is recyclable or recycle-ready.

74% say the same about refills that use recycled plastic.

These preferences directly influence what consumers pick up in-store and add to their baskets.

But the pressure on brands isn't just coming from the checkout aisle; it's also coming from regulations like the PPWR.



The upcoming PPWR framework mirrors consumer demands, meaning that brands must:

1. Reduce packaging waste
2. Improve recyclability
3. Increase post-consumer recyled (PCR) content
4. Minimize unnecessary packaging

Within this framework, there are also rewards for more sustainable packaging through eco-modulated Extended Producer Responsibility (EPR) schemes, with potentially lower fees based on recyclability and recycled content. For personal care brands, this means material selection and packaging design directly influence total costs over the pack's lifecycle.

Fortunately, Amcor has a wide range of initiatives to improve a pack's performance: **Amcor's AmPrima® recycle-ready refill pouch with PCR**.

Up to 92% reduction in packaging weight

Up to 89% reduction in carbon footprint*



Amcor offers a complete recycle-ready packaging system comprising the **Mocha bottle**, **Wave™ mono-material pump**, and **CleanStream™ PCR pouch**. The mono-material pump and dispenser support PPWR-compliant recyclability, while the CleanStream™ PCR pouch is approved for contact-sensitive applications. PCR content options are available throughout the system.

These improvements represent a step change in material efficiency, allowing brands to meet consumer expectations on price and demonstrate credible progress on sustainability.

*PE/PE laminates vs. rigid PP tub, mechanically recycled. Based on Amcor's ASSET lifecycle assessment, assured by the Carbon Trust.

BRAND LOYALTY THROUGH REFILLS

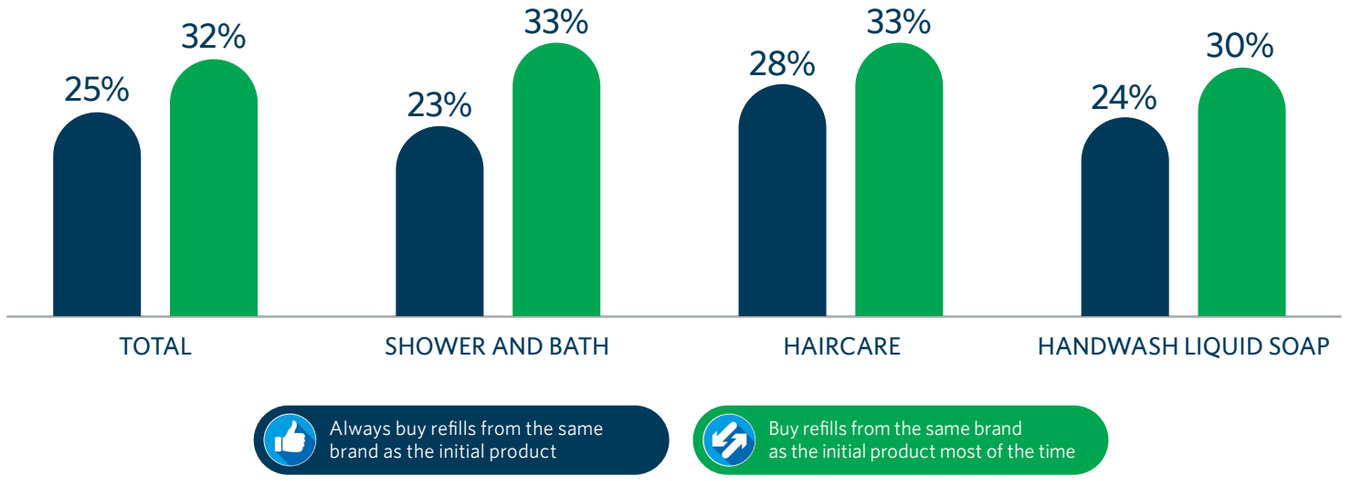
Most consumers tend to buy refills from the same brand as the initial product, making every refill purchase an opportunity to reinforce loyalty.

The loyalty picture

Brand loyalty is a defining feature of refill purchasing. Across personal care, 57% of consumers always or most often buy refills from the same brand as their original product, demonstrating that once consumers invest in a refill system, they're more likely to stay with brands that deliver a consistent experience.



Brand loyalty for refills



MAINTAINING BRAND LOYALTY

The biggest reasons consumers choose another brand also represent the biggest opportunities to strengthen repeat purchases.

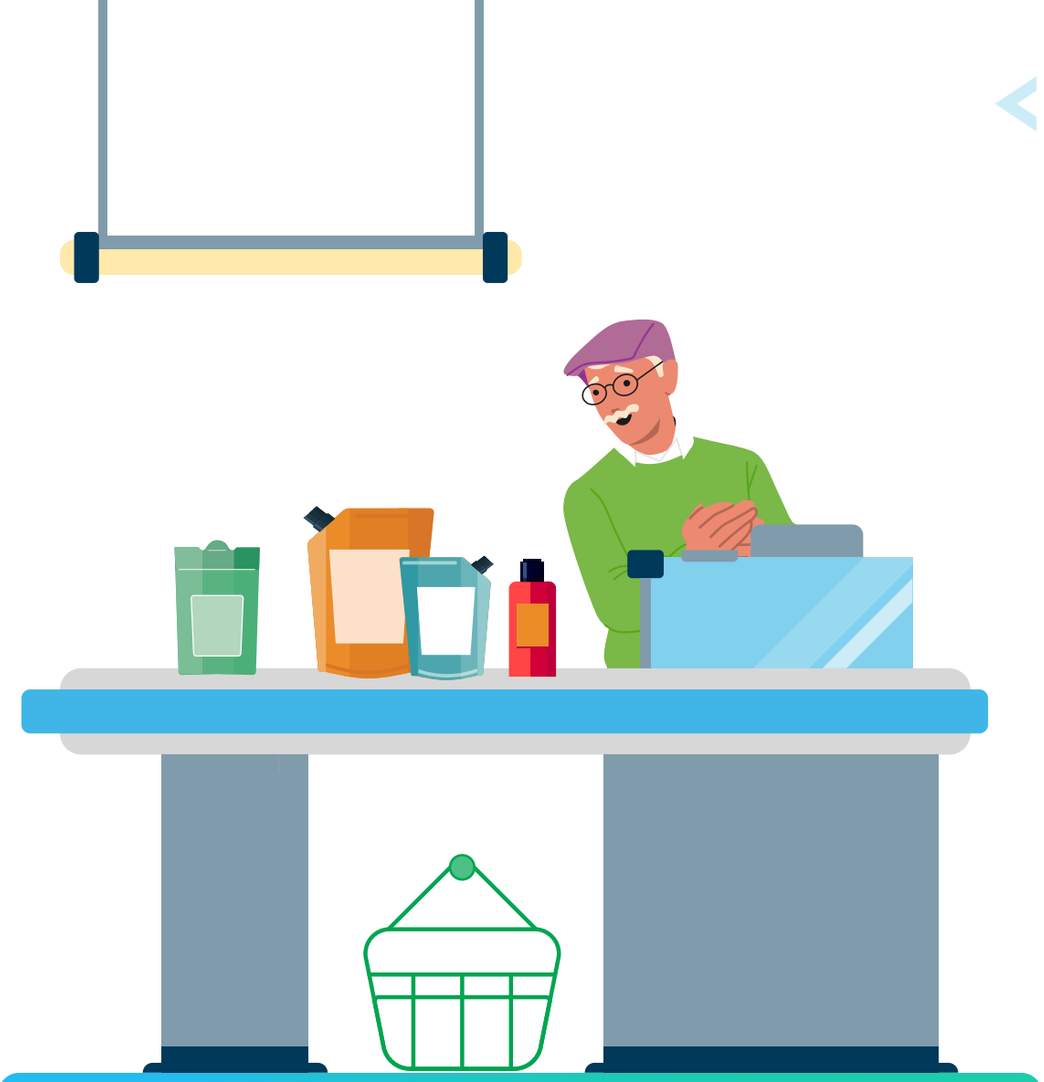
Price is the number one driver (37%).

In a category where 86% expect refills to cost less, competitive pricing is critical to winning a customer's business.

25% switch for preferred scents or features, offering a reminder that product differentiation still matters in refill formats.

20% switch because the format size is closer to what they need, suggesting that a limited size range can actively push consumers toward competitors.

Here, Amcor's recyclable refill pouches offers variety to help counteract this challenge, ranging from 30ml to 2litres. This variety serves retail, e-commerce, and professional channels from the same packaging platform to meet diverse consumer expectations and encourage them to stay brand loyal.



20% **switch because the format size is closer to what they want – a gap the right packaging range can close.**

BARRIERS TO GROWTH: WHAT'S HOLDING REFILLS BACK

Consumers want to buy and use more refills. But practical pain points – in the store and at home – are getting in the way.

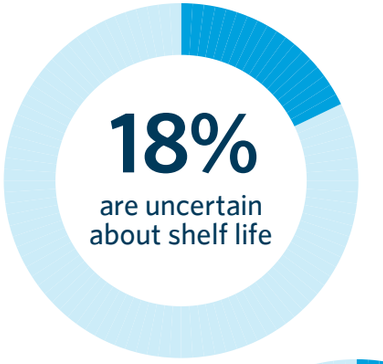
Availability is a key driver. **45% would buy more if refills were easier to find in-store or online**, pointing to a significant distribution and visibility gap.

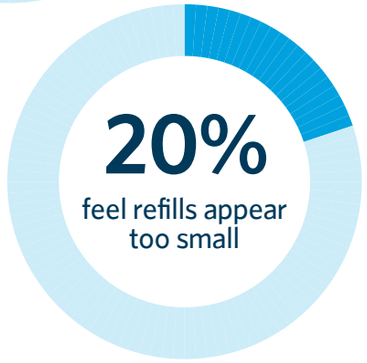
Among non-buyers, **nearly half** say the main barrier is simply that **they can't find their preferred brand in refill format.**

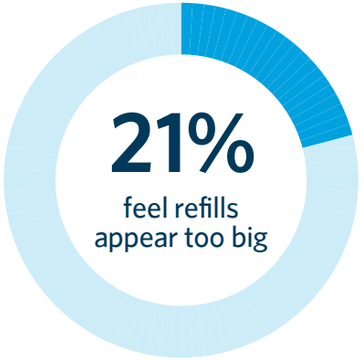
Only **4%** of current refill buyers see no reason to buy more in the future. Once shoppers have the refill habit, they are likely to keep it.











IN-STORE BARRIERS: THE SHOPPING EXPERIENCE

The most common obstacle is visibility. 25% of respondents don't notice refills when they shop, suggesting that packaging design, shelf placement, and merchandising all have a role to play.

Size mismatch is a persistent source of confusion. **21% feel refills appear too big; 20% feel they appear too small.** This dual concern points to a fundamental fit problem: when bottles and pouches are developed independently, consumers can't easily judge whether the two will work together. That's ensuring that the whole package – bottle, pouch, pump – is developed together, something Amcor is able to offer customers.

Shelf life uncertainty affects 18%, making them reluctant to commit to larger formats or multi-buy offers. 15% cite limited storage space, particularly relevant for consumers in smaller households or urban apartments.

That said, **32% report no in-store pain points at all,** presenting a significant base of comfortable refill shoppers to build on.

25% of respondents don't notice refills when they shop.

AT-HOME BARRIERS: THE USAGE EXPERIENCE

35% find it difficult to empty the refill entirely – the number one at-home issue, leaving consumers feeling that product is wasted.

Messiness during refilling is the second most common complaint (**29%**), for example spillage or product running over, a clear signal that spout and closure design matters.

Amcor is able to offer solutions to these issues through the development of an integrated packaging system.

A second tier of concerns reveals deeper issues with the refill experience:

17% feel that the refill looks less attractive than the original product.

16% worry the product won't perform as well – for example, that the pump will degrade over time.

15% find closures difficult to remove.

Again, **33%** report no usage pain points, confirming that well-designed refill systems can and do work.



Amcor's Wave pump is guaranteed for 5000 pump actions, designed for re-use.

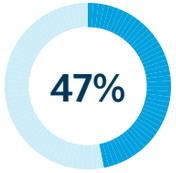
HOW CONSUMERS ACTUALLY USE REFILLS

Understanding real-world refill behavior helps brands design systems that work with consumers, not against them.



The four key behaviors:

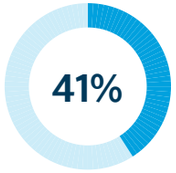
1. Minimizing waste before refilling



use as much of the original product as possible before refilling – the most common behavior. Consumers want to avoid mixing old and new product, and they want to feel they've gotten the maximum value before starting the next cycle.

Design implication: A pouch that allows efficient, near-complete emptying directly addresses this instinct. If product is left behind (a pain point for 35%), the perceived value of the refill drops.

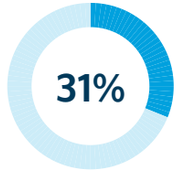
2. Gradual top-ups, not single pours



keep the refill nearby for topping up, using it gradually rather than emptying the entire pouch in one go.

Design implication: Refills need to perform over multiple uses: maintaining a reliable seal, staying upright during storage, and dispensing cleanly each time.

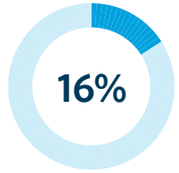
3. Hygiene matters



rinse the container before refilling, indicating a strong awareness of hygiene and product integrity.

Design implication: A reusable bottle and pump that's easy to rinse – with a wide enough opening and durable materials.

4. Bypassing the system entirely



use the refill pack as a standalone product – they don't transfer the contents at all.

Design implication: The pouch itself needs to be functional as a standalone format. But this also suggests some consumers don't yet see enough value in the rigid bottle to justify the refill process, reinforcing the importance of a premium primary container that consumers genuinely want to keep.

ONE PARTNER, ONE SYSTEM

When a complete pack with refills are engineered together, the result is a refill experience that works for both consumers and brands.

The consumer insights from the study point to a consistent set of challenges: size mismatch between bottles and refills, messy refilling, whether the original packaging degrades over time, and an experience that may feel like a compromise.

Amcor takes a different approach. As one of the few packaging partners that manufactures both rigid containers and flexible pouches, Amcor offers an integrated refill system, engineered so that every component works together from the start.

Consistent quality:
One supplier, one quality standard across the entire system.

Faster go-to-market: Integrated development reduces complexity, shortens timelines, and simplifies sourcing.

THREE COMPONENTS, ONE CONNECTED SYSTEM:



AmPrima® recycle-ready refill pouch

A lightweight, flexible pouch available from 350ml to 2L, designed for efficient emptying, clean pouring, and minimal material use. Recycle-ready with the option to incorporate post-consumer recycled (PCR) content.



Recycle-ready bottle

The reusable primary container. Durable, premium decoration, and brand experience, and designed to stay with the consumer over multiple refill cycles, maintaining shelf appeal and giving consumers a reason to invest in the system.



Wave recycle-ready pump

A long-lasting, quality dispensing solution designed for an elegant consumer experience. Engineered for hygienic daily use and consistent performance, **Amcor's Wave™ pump** is guaranteed for 5,000 pump actions, providing reliable dispensing across multiple refill cycles.

CONNECT WITH OUR EXPERTS

Get in touch with our team of beauty and personal care packaging experts today.



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