

Curves & Angles

What's developing for 2027.

The pull towards soft, rounded forms isn't just fashion. Peer-reviewed research finds rounded forms read as warm and approachable, angular forms as harder to like at first glance.⁶ The direction showed up repeatedly across the packaging market through 2026: new rounded-base and curved-shoulder formats entering standard ranges, and rounded, compact forms reported as the dominant shift at the year's major trade shows.⁷

However, not everyone is following. While plenty of curves are already in the pipeline for 2027, a noticeable set of brands, often apothecary-led and heritage-coded, are choosing sharper, structured silhouettes precisely because everyone else is going soft. The brands standing out in 2027 won't be the ones following the shape trend, but the ones who know why they chose theirs.

⁶Bar and Neta, "Humans prefer curved visual objects," Psychological Science, 2006; Frontiers in Psychology, "Shape-Trait Consistency," 2021. ⁷Richmond market observation, 2026.

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richmondgroup.com
mail@richmondgroup.com
+44 (0) 208 057 4440

Key Trends 2027



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What We're Watching 2027

Matt is having its moment.

Matt and soft-touch surfaces are gaining ground on high gloss, with this year's shows showing matt finishes where gloss once sat by default.¹ Mintel frames the wider shift as texture carrying as much weight as visual appeal.² Through 2027, expect matt specified as standard more often.

¹ Formes de Luxe, 2026; Richmond market observation, 2026. ² Mintel, 2026 Global Packaging Predictions.

Glass weight, an old question sharpened.

Whether premium glass runs lighter or heavier is not new, but minimisation rules and freight costs have given it fresh edge. That said, mass still translates to worth in consumers minds, and indicators show the two running in parallel rather than one dominating: ultra-minimalist alongside bold and substantial.³ Where lightweighting is adopted, more work is being done with texture, embossing and finish to target a luxury aesthetic.

³ Formes de Luxe, 2026; Richmond market observation, 2026.

The middle is the risky place to stand.

Only 17% of UK consumers say they can spend freely, against flat FMCG volume growth of -0.2%.⁴ Growth is concentrating at two ends: premium built on demonstrable efficacy, and accessible ranges offering obvious value. The pressure falls on what sits between.⁵ For packaging, presentation needs to make that choice legible, or it competes at both ends with the advantages of neither.

⁴ NielsenIQ and CEW UK, 2026 Beauty Reset. ⁵ NielsenIQ, Global Beauty Report 2026.

PPWR

What Actually Changes for Beauty and Wellness Packaging

August 2026

The law has landed, the rulebook hasn't

- Regulation (EU) 2025/40 became directly applicable across all 27 Member States on 12 August 2026, with no transposition requirement and no stock grace period.⁸
- The new PFAS limit applies to food-contact packaging, not cosmetics.
- The heavy metals limit remains unchanged from the previous Directive and applies to all packaging.⁹
- In practice, most of the pressure fell on technical and packaging teams to complete conformity documentation before the deadline, rather than on redesigning packaging itself.
- Around 30 delegated acts remain unwritten.¹⁰
- Six Member States have already informed the Environment Council that countries are interpreting the rules differently.¹¹

⁸Regulation (EU) 2025/40, Article 71; European Commission, DG Environment ⁹European Commission, PPWR Guidance Document, C(2026) 2151 final, 30 March 2026. ¹⁰EUROPEN, "12 August 2026: Ready or not, here comes the PPWR", ¹¹Council of the European Union, note 10712/26, 23 June 2026.

December 2026

The arithmetic behind the target

- The recycled content requirements for cosmetics packaging are now defined: 30% recycled content for PET by 2030 and 10% for other plastics, increasing to 50% and 25% respectively by 2040.¹²
- The methodology for calculating recycled content is due by 31 December 2026, and the calculation method will be just as important as the percentage targets themselves.¹³
- Only post-consumer recycled material counts towards these targets; internal regrind does not qualify.¹⁴
- The biggest challenge is likely to be material supply and quality, rather than willingness to meet the targets.
- Cosmetics-grade recycled material that can maintain pure colours and tight tolerances is both scarcer and more expensive than standard recycled plastic.
- The technology required to produce this material consistently at scale is still developing.¹⁵

¹²Fieldfisher, "New EU packaging and packaging waste rules: 10 key things every global business should know", ¹³Regulation (EU) 2025/40, Article 7(8), ¹⁴Regulation (EU) 2025/40, Article 7(8), ¹⁵Trade reporting citing regulatory consultancy sources; verify before publication.

February 2027

What passes, and who decides.

- Packaging is self-certified, with manufacturers signing a Declaration of Conformity before placing products on the market.¹⁹
- Some requirements are difficult to certify against because key criteria, including recyclability grades, will not be published until 2028.²⁰
- From February 2027, all Member States must have penalties in place for breaches relating to overpackaging, packaging formats and reuse requirements.²¹
- Fine levels will vary by country, creating different enforcement approaches across the EU.
- Brands must choose between committing to packaging decisions before all criteria are known or delaying development and losing valuable time.

¹⁹Regulation (EU) 2025/40, Article 6(4), ²⁰Regulation (EU) 2025/40, Article 68; Article 68(2), ²¹Regulation (EU) 2025/40 (EU declaration of conformity and technical documentation); European Commission, PPWR Guidance Document, C(2026) 2151 final, 30 March 2026.

2028 to 2030

The clock that's already running

- Recyclability is becoming a graded regulatory requirement, with detailed criteria due by January 2028.¹⁶
- From 2030, packaging that does not meet the minimum recyclability grade cannot be sold.¹⁷
- Brands may need years to requalify components such as pumps, closures and finishes, even though the final criteria have not yet been published.¹⁸
- With recycling technologies still developing, waiting for regulatory clarity could leave too little time to comply.

¹⁶Regulation (EU) 2025/40, Article 6(4), ¹⁷Regulation (EU) 2025/40, Article 6, ¹⁸Trade reporting citing regulatory consultancy sources; verify before publication.

