

THE UK  
PLASTICS  
PACT



wrap

# BLAZING A TRAIL

ANNUAL REPORT  
2019/20

# ON PLASTICS

## FOREWORD

# OUR UNWAVERING FOCUS

**There are few issues in the environmental debate in recent times which have been as emotive as plastic. It feels like the totem around which the public, worried in general terms of the state of our planet, could coalesce.**



**MARCUS GOVER**  
CEO, WRAP

## AIMING HIGH

When we embarked on our journey to create a world where plastic never becomes waste through The UK Plastics Pact, we deliberately aimed high. It would have been tempting to succumb to the pressure for instant results, with crowd-pleasing piecemeal actions or solutions which simply displaced the environmental cost elsewhere.

But only through completely recalibrating the reckless take-make-dispose plastic approach, which had evolved over decades, will we have a chance to build a durable system which keeps plastic in the economy and out of the environment for good. That scale of change takes time and unwavering focus.

## RECORDING SUCCESS

Transparency and accountability are powerful levers to help translate a vision into action and underpin everything we do at WRAP; whatever that scrutiny reveals. I'm delighted to say that our members have fully embraced this approach and we now have two years' worth of valuable data. This is the only way we can genuinely record success, but also highlight areas which need extra stimulation. It is in this spirit that we present the latest progress report for The UK Plastics Pact.

The 2019 data show that our business members are making some good progress against all four targets. We've seen a decline in the amount of plastic packaging used, including a real shift away from non detectable black plastic, and good progress in the aim to eliminate unnecessary and problematic single use plastic. We're seeing more people recycle than ever before. Some leading businesses are building solid foundations for developing refill and reuse alternatives for customers.

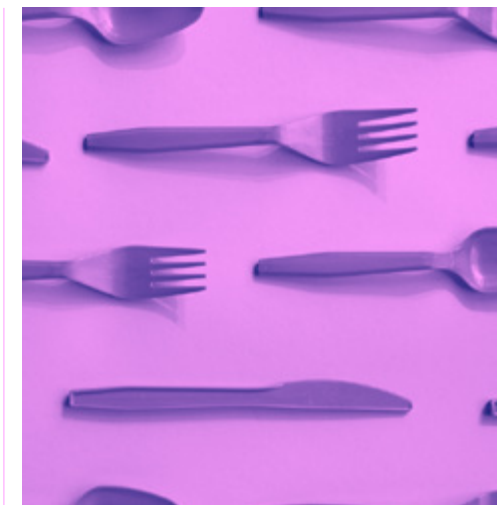
However, it is overall a mixed picture with significant challenges in certain areas – such as in tackling flexible packaging and the stalling in the reduction of polystyrene use. We will be addressing these as a matter of urgency to ensure they do not impede our ability to deliver on the targets by 2025.

What is encouraging, and not always visible to the external world, is the commitment Pact members have demonstrated in working together to unpick and work on solutions for these complex challenges. This has not wavered, even in the grip of a pandemic which has engulfed the industry, and our members' continued leadership and engagement should be applauded.

WRAP has convened several working groups which are rich and dynamic forums of shared learning and ideas. They are setting the direction and pace and driving an ever-growing impressive bank of knowledge and technical guidance. I see many testimonies from members who credit this knowledge to informing their own action. And this pioneering body of work is also helping to shape the growing network of global pacts – all working towards a shared vision of a global circular economy for plastics.

We are almost at the halfway point on our journey. It is a short distance in time, but a long way to travel for the Pact. We need to have total focus on the problem areas, while pushing forward where we are seeing good progress. We need to continue to foster innovation, stimulate growth in refill and reuse, and push for greater investment in the infrastructure which will be needed to cement a new system. We need the public to play their part by making sustainable choices around the way they use and dispose of plastic.

The UK Government policy package such as the reformation of Extended Producer Responsibility, Deposit Return Schemes and fiscal incentives will help drive change, but is some way off. There is too much at stake economically and environmentally for failure to be an option. I believe we will achieve our goal through our shared ambition to be part of the solution and not the problem. Together we can. Together we will.



“  
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 ”

# SUMMARY OF PROGRESS TARGETS AND DATA\*



This is an interactive document. Click on the top nav and the targets below to navigate around the guide.

## TARGET 1

### ELIMINATE

problematic or unnecessary single-use packaging through redesign, innovation or alternative (reuse) delivery models.

## 400 MILLION

items classed as problematic or unnecessary were sold by Pact members in 2019 (a 40% reduction from 2018).

## TARGET 2

# 100%

of plastic packaging to be reusable, recyclable or compostable.

## 64%

of plastic packaging placed on the market by Pact members continues to be recyclable.

## TARGET 3

# 70%

of plastic packaging effectively recycled or composted.

The amount of plastic packaging recycled in the UK has increased from 44% in 2018 to

## 50%

in 2019.

## TARGET 4

# 30%

average recycled content across all plastic packaging.

Average recycled content has increased from 9% in 2018 to

## 13%

in 2019.

\* View a detailed breakdown of actions and milestones against each target in our updated [Roadmap to 2025](#).

# TARGET 1

## ELIMINATING PROBLEM PLASTICS

**400  
MILLION ITEMS**

**classed as problematic or unnecessary were sold by Pact members in 2019 (a 40% reduction from 2018).**

The plastic items in our list of eight (numbered 1-5 in the list) total c400 million individual units in 2019. Pact members are on track to eliminate 6 out of 8 of the items classed as problematic or unnecessary by the end of 2020. In all it totals 16,000 tonnes, a fall of 30% since 2018.

### THE EIGHT PROBLEMATIC OR UNNECESSARY ITEMS:

- 1 Plastic cutlery
- 2 Plastic plates and bowls
- 3 Plastic straws and straws with cartons
- 4 Cotton buds with plastic stems
- 5 Plastic drinks stirrers
- 6 Household polystyrene packaging
- 7 Oxo-degradable plastics
- 8 PVC packaging

**Plastic packaging has reduced by 6% and UK Plastics Pact members are on track to eliminate six out of eight problematic or unnecessary items by the end of 2020, with more items to be prioritised and investigated in 2021.**

These numbers are based on members who reported in both 2018 and 2019 to give a meaningful data comparison. New members since the 2018 data submission are not included in this figure.\*

Some items have proven tougher to eliminate, and it was acknowledged from the outset that there may be technical, practical or economic reasons why it would not be possible to achieve elimination in all cases in this timescale. One of these areas is PVC used in pharmaceutical packaging where change will take longer. It is encouraging however that tonnage of PVC has reduced by 60% (10k tonnes to 4k tonnes).

\* All members reporting this year put 793 million items on the market and we will be working with these members towards elimination. Despite an increase in members since our 2018 data report we have seen an overall reduction of 67.6 million items and 2,800 tonnes. The like-for-like data from those members reporting in both years are reductions of 300 million items and 6,100 tonnes.

# TARGET 1: ELIMINATING PROBLEM PLASTICS

A key area of concern is polystyrene used to package multipack yoghurts (and similar products) and white goods where tonnage has remained static. While solutions have been identified, cost is the underlying barrier to change. Government policies such as the Recycled Content Tax and Extended Producer Responsibility is expected to drive change where it is lagging, but business does not have to wait for this.

It is not only 8 items where Pact members are required to take action. There is a need to consider alternative approaches to a wide range of plastic packaging to reduce their environmental impact. Pact members are tackling an additional 19 items highlighted as problematic, in an attempt to address the problems associated with them. The actions being taken depend on the individual business and it is important for them to consider all environmental impacts and unintended consequences in their decision making.

We have seen a wide range of actions including removal of packaging, introduction of refill schemes, and improved packaging design switching from non-recyclable to recyclable polymers.

The next step is to continue the push to design for recyclability, and drive for more innovative thinking around reuse and refill business models, capturing the learnings and best practice from trials and scaling up to ensure we reach our ambition of reuse and refill being mainstream by 2025.

## WHAT'S NEXT?

In Spring 2021 we will be publishing an update to our Eliminating Problem Plastics report. We are consulting with Pact members and wider industry about the addition of further items to be avoided or redesigned with appropriate timeframes for such action.

## GUIDANCE AND SUPPORT

WRAP has been working with members to provide further direction on the plastic items and issues to tackle. We have also been working to improve understanding (with all stakeholders and citizens) of the environmental impact of packaging. Some of this work has included:

- Overview of alternatives to EPS.
- The business case for switching out of PVC packaging.
- Environmental considerations for switching to alternative packaging materials.
- Our new citizen campaign, Clear on Plastics working alongside the hugely successful Recycle Now.

As well as our update to the Eliminating Problem Plastics report, we will be publishing a major piece of research on the role of packaging in preventing food waste.

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**THERE IS A NEED TO  
CONSIDER ALTERNATIVE  
APPROACHES TO  
ADDRESS THE PROBLEMS  
PRESENTED BY  
PLASTIC AND REDUCE  
ITS ENVIRONMENTAL  
IMPACT.**



# TARGET 1: HIGHLIGHT OF MEMBER ACTIONS

The selection of actions outlined in the report have been implemented during 2019 and 2020.

## REMOVAL OF PVC AND PS

Members have worked to eliminate PS and PVC from their packaging portfolios, and many have achieved this despite the numerous challenges.

**Asda** has removed PVC from their fresh produce range and **Hilton Food Group** has removed both PS and PVC from products sold to retail partners. **Sainsbury's** has removed PS and PVC from own brand packaging. **M&S** has removed PS and PVC from all of its own-brand food packaging.

**Reckitt Benckiser**, **General Mills/Yoplait** and **Silver Spoon** have all taken steps to remove PVC from their packaging portfolios and **pladis** has removed 100% of PVC from their packaging portfolio. **Lidl** and **Aldi** will have removed black plastic, PVC and EPS from their own label core range food products by the end of 2020.

**Klockner Pentaplast** has replaced a PVC clingfilm with a recycle ready polyolefin that can be recycled at retailer front of store collection points. **Tata Consumer Products** is no longer producing PS lids on disposable paper cups and has replaced this with PP lids which can be recycled.



## Case study: Danone Yoghurt Pots

Although polystyrene is traditionally used for its lightweight and 'snappable' properties, it is not recyclable in the UK.

Working alongside their global packaging teams and local partners, Danone investigated, trialled and invested in new technologies to produce new

yogurt pots from PET or PP. Their new PET pots are recyclable and importantly, enable the inclusion of recycled plastic content back into the pots to help build a circular economy for their packaging. The existing Oykos brand and the new Danone brand, are the first to transition into recyclable PET pots, with the rest of the portfolio of yogurt pots to follow. ALL new products in the future will be in recyclable pots.

## TARGET 1: HIGHLIGHT OF MEMBER ACTIONS

### PACKAGING REDUCTION AND REMOVAL

As directed through Pact targets and guidance, excess and unnecessary packaging is being addressed by a number of members.

**Mondeléz International** has reduced plastic packaging in its large Cadbury sharebags by 15%.

**PepsiCo** has redesigned the packaging of leading crisp brands 'Wotsits, French Fries and Monster Munch' to reduce headspace resulting in an average reduction of 30% in multipack film plastic.

**Tesco** has removed shrink film from multi-packs of tinned foods resulting in a reduction of 350 tonnes of unnecessary plastic every year. **Kraft Heinz** has also removed all plastic shrink wrap from canned multipacks sold in Tesco. This is saving 175 tonnes of plastic film a year on Heinz Banz, pasta and soup.

**Compass Group UK** is reducing single use plastic and is now using 30 million fewer items of plastic cutlery.



### Case study: Greiner Packaging – Replicating snappability in a PP format

Greiner worked with tooling suppliers, and with Kiefel to develop a tool that allowed a 'snap and tear' functionality. The goal was to make a product that could easily replace PS through the existing supply chain without major costs being incurred.

Following trials in 2018 with supply chain partners including fellow

UK Plastics Pact members Yeo Valley and Tesco, they developed a product that met all the critical requirements in terms of functionality. The work exemplified the spirit of collaboration with all parts of the supply chain working together to a solution that moved away from unrecyclable polymers into a fully recyclable format in line with The UK Plastic Pact targets.

The first products hit the shelves in September 2019 with mixed feedback from customers. Greiner

and its partners have taken the feedback away and are developing a product with improved 'snap'. This will launch before the end of 2020.

Going into 2021 Greiner will be adding recycled content to some PP products as they work with suppliers to develop and launch rPP products to the market, complementing the range of rPET products already available, as they work towards the UK Plastics Pact goal of 30% recycled content in plastic packaging.



# CLEAR ON PLASTICS

Campaign reach since  
March 2020

**440,000**

citizens reached.

**1,700**

followers on Twitter  
and Instagram.

**Why can't we  
just ban all plastic  
packaging?**



Clear on Plastics

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## A NEW CITIZEN CAMPAIGN

Clear on Plastics was launched by WRAP in March 2020. It aims to cut through the confusion and give citizens clear, evidence-based information on plastics and sustainability, allowing them to make their own informed choices. This includes explaining the role of plastics and demonstrating the balance between the benefits and drawbacks of alternatives.

The campaign was the result of a year-long insights and strategy development to identify how we can best communicate and support citizens with positive plastic behaviours.

The campaign direction has been a result of regular social listening temperature checks and sharing of customer insights from the UK Plastics Pact members at the collaborative action group on citizen engagement, to ensure we are plugged in to the online conversations of citizens and their concerns and questions surrounding plastic waste and recycling.

We have covered a myriad of topics exploring critical subjects including:

- I'm worried that my recycling just isn't worth it.
- Is recycling just an excuse to carry on producing more plastic?
- What about bio-plastics, biodegradable and compostable plastics?
- Why can't we replace plastic with other materials such as glass or paper?
- Why can't we just ban all plastic packaging?
- What can I do to reduce plastic pollution?
- What are the types of plastic and what are they used for?
- Why reuse and refill plastics?

Our most recent campaign moment launched in November 2020 and focuses on the beauty industry, exploring the question – How can I reduce plastics in my beauty routine?

Key measures for the campaign centre around online reach and sentiment and we have used social influencers to help share our messages. For such a young campaign the early results are promising.

As well as the planned influencer activity since March we have been able to respond reactively to the online conversation and media announcements which has seen great engagement. When Asda recently announced their trial sustainability store was opening our organic post generated more than 250 likes in 12 hours.

## HOW TO FIND US

Website – [clearonplastics.com](https://clearonplastics.com)

Instagram – [@ClearOnPlastics](https://www.instagram.com/ClearOnPlastics)

Twitter – [@ClearonPlastics](https://twitter.com/ClearonPlastics)

Free assets available at:

[partners.wrap.org.uk/campaigns/Clear-On-Plastics](https://partners.wrap.org.uk/campaigns/Clear-On-Plastics)

# TARGET 2

## REUSABLE, RECYCLABLE, COMPOSTABLE

**64%\***

**of plastic packaging placed on the market by Pact members continues to be recyclable.\*\***

To make significant progress to improve this figure, urgent action must be taken to make flexible plastic packaging widely recyclable in the UK. If mono-material polyethylene and polypropylene films were recycled, 79% of packaging would be classed as recyclable.

### POSITIVE MOVES

There have been positive moves by Pact members in the areas of packaging redesign for greater recyclability aligned with our Polymer Choice and Recyclability Guidance. We have also seen scale up of reuse and refill trials as well as the removal of non-NIR detectable black plastic at scale.

### PLASTIC PACKAGING DESIGNED FOR COMPOSTING

We published guidance on compostable plastics setting out where the opportunities may be for such packaging, while recognising the challenges of existing infrastructure.

### FLEXIBLE PLASTIC PACKAGING

The limiting factor remains action on flexible plastic packaging – which therefore remains the major priority for The UK Plastics Pact.

Flexible plastic represents a quarter of all UK consumer plastic packaging, but only 6% is currently recycled. Complex challenges underpin this: poor design, collection infrastructure, inconsistent communications, sorting challenges, reprocessing technology, capacity, and unstable end markets.

\* 2018 baseline data has been recalculated due to the discovery of data quality issues from two members which they were unable to correct. Target 2 baseline has moved from 65% to 63%.

\*\* In order for packaging to be classified as recyclable or compostable, this must be proven to work in practice and at scale. The packaging types listed as non-recyclable or non-compostable are not deemed as meeting this criteria in 2019.

### What are the remaining non-recyclable or non-compostable packaging materials?

PE film	<b>7.5%</b>
PP film	<b>8.2%</b>
PET film	<b>1.6%</b>
PS	<b>1.6%</b>
PVC	<b>0.7%</b>
Multi	<b>6.1%</b>
Other/undeclared polymer	<b>6.9%</b>
Non-NIR black	<b>1.4%</b>
Material with PVC components	<b>0.3%</b>
Plastics designed for composting	<b>&lt;0.1%</b>
Others	<b>2.0%</b>

## TARGET 2: REUSABLE, RECYCLABLE, COMPOSTABLE

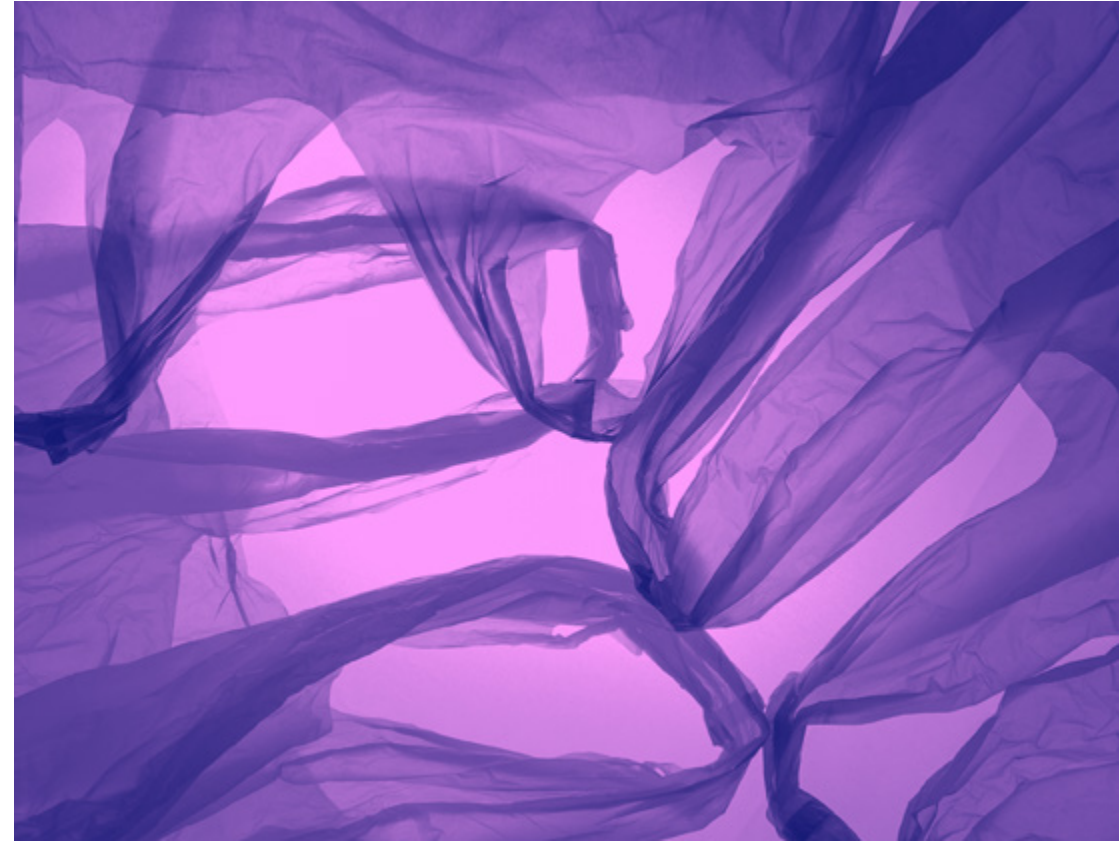
Current schemes like front of store collections are a step in the right direction but are not widespread enough, do not collect the range of flexible packaging required and are underused and contaminated. These collection points are a critical stepping stone to household kerbside collection which, supported by improved packaging design and new infrastructure and technology, will support the increased collection capacity.

Government legislation and movement on the consistent collections agenda will also play a significant role. It will require action from the entire plastic value chain if we are to be successful in working towards Target 2.

### SO, WHAT'S BEING DONE?

The UK Plastics Pact published its roadmap for flexible plastic packaging in July 2020 calling for members to unite behind it and work towards these broad aims:

- 1 Designing packaging that can be recycled and sorted.
- 2 In the short term, capitalising on the front of store collection points provided by many supermarkets.
- 3 In the long term, implementing collection at kerbside in all local authority areas.
- 4 Investing in sorting and reprocessing capacity and capabilities.
- 5 Ensuring recycled flexible plastic packaging has strong and stable end markets.



## TARGET 2: REUSABLE, RECYCLABLE, COMPOSTABLE

### REUSE/REFILL

Our aim for reuse/refill is for this to become mainstream by 2025. We are working with Pact members to share good practice and overcome challenges. We are also reviewing our Roadmap to ensure that the level of ambition is right.

“  
**WITH EACH REUSE AND REFILL TRIAL THERE IS AN OPPORTUNITY FOR COLLECTIVE LEARNING THAT GENERATES A GREATER UNDERSTANDING OF WHAT WORKS COMMERCIALY.**  
”

UK Research and Innovation (UKRI) has launched a £475k fund for refill projects. The grants, administered by WRAP, form the second round of the UK Circular Plastics Flagship Projects competition which is aiming to find innovative solutions to the issues of plastic waste. The programme of funding is fully aligned with The UK Plastics Pact targets. Grants of between £50,000–£150,000 will go to trial projects which demonstrate innovative ways of implementing refill infrastructure in existing or new supply chains. And there are more announcements to come in 2020 and 2021 with a focus on reuse and refill.



Ongoing work with Pact members is providing a forum for shared learnings on reuse and refill business models. With each reuse and refill trial there is an opportunity for collective learning that generates a greater understanding of what works commercially. We are working with members to assess the barriers and work towards potential solutions so that we can make reuse and refill commercially viable and scalable. We have also set up member groups which are targeting specific issues around a reuse/refill target, legislation and standards.

### GUIDANCE AND SUPPORT FOR BUSINESSES

- [Creating a Circular Economy for Flexible Plastic Packaging – a Roadmap to 2025 \(July 2020\).](#)
- [Black plastics hub – answering the most common FAQs on the material with links to key reports \(published July 2020\).](#)
- [Defining what's recyclable and best in class polymer choices for packaging \(Updated November 2020\).](#)
- [CEFLEX – Film recyclability design guidance \(Phase 1 published July 2020\).](#)
- [UKRI Plastics Innovation grant funding \(awarded money and projects initiated\).](#)
- [Report for members only on non-mechanical recycling \(Sept 2020\).](#)



## TARGET 2: HIGHLIGHT OF MEMBER ACTIONS

### NON RECYCLABLE BLACK PLASTIC REMOVAL

WRAP is working with Pact members to ensure that brands, manufacturers and retailers remove using non-NIR detectable black plastic and the recycling sector adjusts their sorting technology to NIR as appropriate. Here is some of the progress from members:

“

SBF GB&I is a proud founding member of The UK Plastic Pact, that is determined to turn our shared ambitious goals into reality.

Our progress in radically redesigning our Ribena 500ml bottle – optimising it for bottle-to-bottle recycling – as well as our move to paper straws in 2020 is a clear demonstration of the positive outcomes from this collaborative effort.

”

**Jo Padwick, Business Transformation Manager, Suntory Beverage and Food GB&I**

### REPLACEMENT MATERIALS FOR NON RECYCLABLE BLACK PLASTIC

**Samworth Brothers** have removed all non-detectable black rPET trays and **pladis** has moved 22 million trays from non-NIR black to cloudy/clear. **Speedibake** has replaced any non-NIR black rPET with cloudy rPET.

**Hotel Chocolat** has removed in excess of 300 tonnes of black rigid PET plastic trays and replaced them with clear PET trays that contain a minimum of 50% post consumer waste, and is working towards removing black plastic completely by the end of 2020.

All retailers will have removed non-NIR black plastic within their own label ranges by the end of 2020.

**Quorn** is now black plastic free, having moved to clear aPET and later to clear rPET across the snacking range.

**M&S** has eliminated 100% of the black plastic used to package its food products.

### NON CARBON BLACK

**Berry M&H** has developed a carbon free black masterbatch for use in manufacture and **Reckitt Benckiser** is using non-carbon black technology in its portfolio.

### REDESIGN

Aligned with The UK Plastic Pact polymer choice guidance, members are beginning to make the changes necessary to design their packaging for greater recyclability. These include:

**Suntory Beverage and Food GB&I** has launched a new smaller label on Ribena 500ml bottles to improve bottle-to-bottle recyclability.

**Kimberly Clark** redesigned its Andrex moist toilet tissue packaging from multi laminate to mono layer LDPE which can be recycled at front of store collection points.

**Procter and Gamble's** Pampers nappies and Always film packaging is mono layer LDPE which can be recycled at front of store collection points.

### Case study: Flexible innovation

Reckitt Benckiser launched a PE recyclable flexible pouch for Finish with the '0%' range – the first of its kind in this product category. This design addresses the issue of multi-layer films not being recyclable.





## TARGET 2: HIGHLIGHT OF MEMBER ACTIONS

### REUSE AND REFILL

Many retailers and some brands have trialled reuse and refill. **Tesco** has teamed up with Loop to trial selling selected branded products in reusable packaging for home delivery. **M&S** is offering its 'fill your own' concept with 44 lines of packaging free groceries at three stores, and will continue testing and learning before rolling out more widely. **Sainsbury's** launched reusable and recyclable bags in fruit and vegetable aisles of all stores. They are also encouraging customers to bring their own containers to meat and deli counters.

**Procter and Gamble's** Olay brand is piloting a new refill that fits in the jar and is also recyclable.

**Aldi** is removing all single use produce bags by the end of 2020 and has introduced reusable produce bags made from recycled content.



### Case Study: Asda's sustainability store

Collaborating with other UK Plastics Pact members including Taylors of Harrogate, Unilever with seven brands including Persil, PG tips and Radox and PepsiCo, Asda have launched a pilot sustainability store.

The store offers common everyday items in refillable formats from

15 refill stations including cereals, pasta, rice, tea, coffee and cordials, personal care products like shampoo, conditioner, and shower gel as well as laundry products like detergent.

53 fresh produce lines have had their packaging removed and the store has also introduced recycling facilities for items that are difficult to recycle at home.

Asda estimate that the initiatives being trialled will save one million pieces of plastic per year.

They use a test and learn approach to see which elements of its offer appeal most to customers and can be developed at scale to be potentially rolled out to more locations in 2021.

## TARGET 3

# SYSTEMIC APPROACH TO BOOST RECYCLING RATES

The amount of plastic packaging recycled in the UK has increased from 44% in 2018 to

**50%**

in 2019.

More people than ever before are recycling, with our latest citizen research highlighting that 87% (9 in 10) UK households regularly recycle.\*

\* Recycling Tracking Survey 2020 – Behaviours, attitudes and awareness around recycling.

### AN UPWARD TREND

The amount of plastic packaging that is being recycled is moving in the right direction. This is a result of more recycling of plastic packaging, coupled with the reduction in plastic packaging being produced.

We must continue this momentum.

**3 MILLION**

Recycle Now website users in 2019 (up by 8% on 2018).

### CITIZENS RECYCLE

Our citizen research suggests that more people than ever before are recycling with 9 in 10 UK households regularly recycling.

We are seeing good examples of retailers and brands promoting recycling on pack which makes it easier for citizens to understand what and how to recycle products and packaging.

**5 MILLION**

Recycle Now locator tool completed searches in 2019 (up by 32% on 2018).

### Recycle Week 2020

Recycle Week 2020 paid tribute to the hardworking collection crews up and down the country and celebrated how people have continued recycling through the extraordinary circumstances of the last eight months. The campaign generated 26 million digital impressions and #RecycleWeek was used 18,000 times. Several UK Plastics Pact members donated to and supported the campaign including; Unilever, Danone, Sainsbury's, Ocado, Highland Spring Group, PepsiCo, Suez, Britvic, SAP, Co-op, Waitrose, Ecosurety, Suntory Beverage and Food GB&I, Reckitt Benckiser and Aldi.

## TARGET 3: SYSTEMIC APPROACH TO BOOST RECYCLING RATES

### EVIDENCE OF CHANGING RECYCLING BEHAVIOURS – RECYCLE NOW

There were two Recycle Now campaigns focussing specifically on plastic between November 2019 and October 2020. We ran the 'bathroom' campaign and the 'back to basics' campaign.

The bathroom campaign reached **5.5 million people** through Facebook and Instagram.

The back to basics campaign in March 2020 focused on milk bottle recycling. It was completed before Covid-19 dominated the media so the reach on social media (Facebook and Instagram) was **5.7 million**; there were **1.3 million impressions** on Snapchat and out of home advertising **reached 2.3 million**.

Evaluation of our Recycle Now campaigns and messaging show that recognition of the Recycle Now communications has significantly increased in recent years and, moreover, this recognition is associated with stronger recycling social norms and increased recycling.

Our evidence also points to people perceiving their recycling behaviours as a strong social norm. On average across our Recycle Now brands 57% perceived a strong recycling social norm.

We have also seen increasing use of our digital platforms which clearly shows that citizens are seeking more information on recycling.

Of the 69% of people who have seen our Recycle Swoosh in the past year\*:

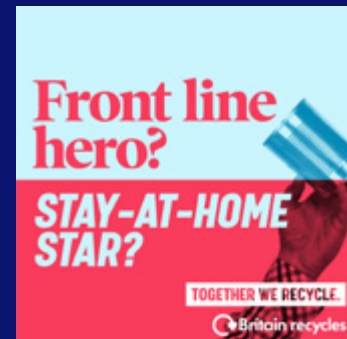
**73%**

say they are recycling more in the past year\*\*

### BRITAIN DOES



### RECYCLE WEEK



\* Based on a survey of 4,058 UK adults aged 18+ with responsibility in the home for dealing with the recycling and rubbish. The profile of the sample matches the known profile of the UK population according to age, gender, social grade and region.

\*\* Recycling Tracking Survey 2019 – Behaviours, attitudes and awareness around recycling – [https://www.wrap.org.uk/sites/files/wrap/Recycling%20Tracker%20Report%202019\\_.pdf](https://www.wrap.org.uk/sites/files/wrap/Recycling%20Tracker%20Report%202019_.pdf)

## TARGET 3: SYSTEMIC APPROACH TO BOOST RECYCLING RATES

### BUT WE CAN ALL STILL DO MORE

Whilst the evidence of improved recycling behaviours is positive we can all still do more and must continue to do more to reach our target of 70% of plastic packaging recycled.

On average, UK households dispose of 1.5 items that could be recycled in the general rubbish (mainly foil, aerosols and plastic detergent or cleaning bottles). And the majority (82%) mistakenly put one or more items in the recycling that are not accepted locally – on average 3.5 items (mainly plastic film/wrapping, toothpaste tubes and glass cookware or Pyrex).

There is still a way to go to correctly identify what we can and cannot recycle. With continued support of our Recycle Now campaign and normative recycling messages, UK Plastics Pact members can really help. By promoting recycling messages on pack and through communications, together we can help create a nation of high performing recyclers and boost the plastic packaging recycling numbers.

### COLLECTION OF PLASTIC PACKAGING

All local authorities collect plastic bottles and the number of them collecting plastic pots/tubs/trays has increased from 79% in 2017/18 to 84% in 2019/20 across the UK. It is anticipated that 100% of local authorities will collect pots, tubs and trays in the next few years as a result of government policies and the implementation of Extended Producer Responsibility (EPR).





## TARGET 3: SYSTEMIC APPROACH TO BOOST RECYCLING RATES

### FRONT OF STORE COLLECTIONS

Flexible plastic packaging needs to be collected directly from people's houses and places of work if we are to achieve the Pact targets. This is a matter which is subject to ongoing government consultation. In the meantime, many citizens are willing to take bags and wrapping to supermarket collection points.

Many leading supermarkets already provide this service for carrier bags, and also accept other polyethylene packaging. We need this to be extended across all supermarkets,

for them to accept all types of plastic film and consistently promote the service to customers.

WRAP's recent research suggests the term 'plastic bags and wrappers/wrapping' being most widely understood by citizens when referring to flexible plastic packaging. Retailers need to adopt consistent terminology and messaging to embed behaviour change in this area. The provision and use of these services are a critical step in helping to develop the recycling infrastructure and end markets ahead of collections from people's homes at their kerbside.

### RECYCLING CAPACITY AND CAPABILITY

Stimulated by corporate commitments and the recycled content plastic packaging tax (for implementation in 2022), we have seen some positive developments in processing infrastructure, particularly around plastics which are harder to recycle such as PET trays and plastic film.

It is imperative we continue to invest and build capacity and capability to sort and recycle plastic waste, particularly focusing on investment within the UK. Not only would this increase jobs within the UK, it would ensure greater transparency and confidence in recycling. Any report of illegal waste activity is one too many; damaging the reputation of recycling as well as devastating our natural environment.

WRAP continues to work closely with government to drive forward plans under the Resources and Waste Strategy. Positive signals from government on requirements for

consumer flexible packaging will stimulate the significant investment required in sorting and processing capacity and capability.

It is not only greater levels of capacity that are required, but also improvements in sorting technology and a wider range of processing technology including non-mechanical recycling. It is likely that the latter will be critical to enabling the use of recycled content in flexible plastic packaging.

**There is a huge opportunity to get people recycling flexible plastic packaging.**

**70%**

**of those *already* recycling plastic carrier bags at a supermarket are not recycling all the flexible plastic they could.**

One in four consumers are not recycling at front of store are receptive to recycling items front of store.

**“ FLEXIBLE PLASTIC PACKAGING NEEDS TO BE COLLECTED DIRECTLY FROM PEOPLE'S HOUSES AND PLACES OF WORK IF WE ARE TO ACHIEVE THE PACT TARGETS. ”**



## TARGET 3: HIGHLIGHT OF MEMBER ACTIONS

### TAKE BACK SCHEMES

Take back schemes offer a temporary solution until flexibles and other plastic packaging is collected from people's homes.

### FRONT OF STORE COLLECTION

**Sainsbury's** is trialling the collection of PP films, along with PE films across 63 stores. PE films continue to be collected for recycling across 609 stores.

**Tesco** has been running a trial for the collection of all types of plastic film in 10 stores. They have collected more than 90 tonnes so far.

**Co-op** has launched a front of store flexible packaging collection for all types of plastic film across 50 stores. They intend to roll this out nationwide in due course.

**Boots** has launched a 50 store take back scheme for hard to recycle cosmetic, skincare, dental and wellness items with the ambition to extend the trial next year.

Many brands have collaborated with **TerraCycle** to boost recycling of hard to recycle packaging. These include:

- **Ella's Kitchen** announced its collaboration with **Danone Yogurt** and TerraCycle to launch the Kids Food Pouch Recycling Programme.
- **KP Snacks** who have collected over 7 million packs since March 2019.
- **pladis** who have collected 11 million wrappers.
- **Procter and Gamble** brands, Gillette and Gillette Venus recycle all models of razors, blades and disposable razors.
- **Hovis** bread bags.
- **PepsiCo** brand, Walkers, offer a crisp packet recycling scheme that accepts any brand, with more than 1600 public collection points in the UK, and 80% of UK homes are now within 4 miles of a collection point.
- **Nestlé UK and Ireland** pet food and confectionery recycling.

### INVESTMENT IN RECYCLING

We have seen interesting developments in investments made in the recycling sector, particularly in hard to recycle plastics. **Veolia**, in collaboration with **Charpak** and **Unilever**, will develop the UK's first dual PET bottle and tray recycling facility.

**RenewELP** is building a new non-mechanical recycling plant in the North East of England. Initially the capacity will be 20kt per annum with plans to expand capacity to 80kt per annum.

**Jayplas** has invested in a 100kt per annum flexible plastic sorting plant. It is working with Exeter City Council to collect kerbside flexible plastics and working with **Co-op** to recycle the flexible plastic collected from their front of store collections.

**Nestlé UK and Ireland** has partnered with **Plastic Energy** in first steps for a chemical recycling facility in the UK.

**Britvic** has entered into a long term agreement for the supply of recycled plastic and has provided a £5m investment package for the construction of a new rPET manufacturing facility.

## TARGET 3: HIGHLIGHT OF MEMBER ACTIONS

### ENGAGING WITH CITIZENS ON RECYCLING

Further engagement with citizens to provide them with the right information and motivation to recycle is critical to the delivery of Target 3. Over the past 12 months we have seen positive engagement from many members, particularly around messaging on the front of packaging.

**Danone** has included recycling messaging on evian water bottle labels and on the back of pack in line with OPRL guidance on the new Danone brand yoghurts.



In 2019 **Mondeléz International** used their 'Be a Good Egg' campaign around good recycling habits for their Easter campaign, and also 'Unwrap a good habit' for Heroes and Roses tubs. The messaging is being repeated again this year across their whole Christmas range.



**Coca-Cola** has created space on their bottle labels to communicate recycling messaging to the consumer on pack. 'Recycle me again, I'm 50% recycled' is the new slogan on the bottles which are made with 50% recycled content.



**Morrisons** has included front of pack recycling messaging across many ranges to inform and encourage customers to bring PE film back to store for recycling.



## TARGET 4

# WORKING TOWARDS 30% RECYCLED CONTENT

Average recycled content has increased from 9% in 2018 to

**13%**

in 2019.\*

This equates to 700,000 barrels of virgin oil production, saving 65,997 tonnes of CO<sub>2</sub>e.

### Why is using recycled content important?

Using recycled content is critical in reducing the plunder of the earth's natural resources, saving carbon whilst stimulating the demand for material, bolstering efforts to build a circular economy for plastics. More recycled plastic equals less need for virgin plastic derived from oil which means it's better for the environment.

**Members are working towards 30% average recycled content across their product and packaging portfolios by 2025.**

The achievement of this target is largely dependent on the outcomes of the other targets; including more collection and recycling of high-quality plastic.

We need packaging design to be simplified so that, as far as possible, all packaging is designed to be recyclable back into the same packaging. Our polymer choices guidance is largely based on this key principle. An example of a positive move includes the continued switching away from coloured aPET into clear aPET, enabling it to be recycled back into plastic packaging, reflected in its significantly higher market value.

We need more plastic packaging to be collected for recycling and significant investment in sorting and processing capacity and therefore the positive progress seen towards Target 3 helps Target 4.

### NEW TECHNOLOGIES

Further development and investment in new technologies for sorting and processing plastic packaging is underway. Non-mechanical recycling will be needed, particularly for film, in order for recycled content to be used in food packaging and enhanced sorting technologies will unlock current barriers to incorporating recycled content in PP.

\* Two historic 2018 data submissions were redacted on request from members who had discovered data quality issues they were unable to correct. This means that we have revised the baseline for Target 4 from 10% to 9%.

## TARGET 4: HIGHLIGHT OF MEMBER ACTIONS

**WRAP recognises that not all packaging types will be able to achieve 100% Post Consumer Recyclate (PCR) and that 100% PCR is not sustainable across the market.**



### DRINKS BOTTLES

**Coca-Cola** has moved all PET bottles to 50% rPET content across all core brands.

**Lidl** has incorporated up to 50% recycled content across their drinks range.

**Danone's** evian brand has introduced 100% recycled content into their top three best selling bottles.

**Nestlé Waters** has launched key formats of Buxton in 100% rPET bottles, with a target of 100% recycled content across all formats by end 2021.

**Highland Spring Group** has moved from dark green to light green bottles as a first step change in removing colour.

**PepsiCo** brands Naked Smoothies and Tropicana Lean have recently moved to 100% rPET.

**Britvic** has launched 100% rPET Fruit Shoot Hydro bottles and has now committed to use 100% rPET bottles across their whole Britvic and PepsiCo GB portfolio by the end of 2022.

### POTS, TUBS AND TRAYS

**Asda** has adopted 50% recycled content in all punnets across fruit and vegetables with some reaching 100% (grapes).

**Ocado** has converted 30% of its own label PET packaging to rPET.

**Waitrose** trays, used to package many of their soft fruits and protein lines, contain approximately 50% recycled content.

**Klockner Pentaplast** has developed RFresh® Elite trays which provide a new option for meat, fish or poultry with up to 100% post-consumer recycled PET.

**Danone** launched a new range of yogurt pots in January 2020 under its company name that are made from PET with 30% recycled content.

**Co-op** is helping to create a market for rPET by specifying a minimum of 50% recyclate in its own label rigid PET.

**Mondeléz International** is now using 75% recycled PET plastic in its Dairylea Lunchables and Snackers range (Dairylea Lunchables Pizza packaging is 60% recycled PET plastic).

**apetito** now uses plastic trays containing up to 80% recycled content.



## TARGET 4: HIGHLIGHT OF MEMBER ACTIONS

### FLEXIBLE PLASTIC

**Highland Spring Group** is testing the viability of using rLDPE in the shrink wrap around its multipack bottles with the view to introducing it to the market should trials prove successful.

### Case study:

#### Waitrose & Partners innovation – Treat Tubs

Waitrose have launched their innovative new packaging for its 'treat tubs', which are made from 90% recycled materials and are fully recyclable. The Twist-Loc® tubs use 3.5 grams less plastic per tub than the previous design and will save over 14 tonnes of new plastic being produced every year. The brand-new packaging solution was the 2019 winner in the UK Packaging Awards, Innovation of the Year category.



### Case Study:

Magnum (Unilever) tubs and lids use recycled polypropylene (rPP)

Magnum's new tubs and lids for its 'pints range' are made with recycled polypropylene plastic (rPP). The rPP is obtained through a non-mechanical process as traditional recycling methods are not suitable to recycle PP into food contact packaging. By the end of 2020, all Magnum Pints tubs in Europe will be produced with rPP, reducing the use of virgin plastic by 160 tonnes.





## TARGET 4: HIGHLIGHT OF MEMBER ACTIONS

### NON-FOOD

**Ecover** switched its household sprays and cleaners and Ecover Zero range to 100% recycled content in 2019 and introduced 50% recycled PP in all washing-up liquid caps.

**Lakeland** has introduced bottles made from 100% recycled content across their cleaning range.

**Reckitt Benckiser** has increased the use of recycled content in a number of products including Airwick Refill blister packs from 50% to a minimum of 70%.

**Unilever** brands 'Love Beauty & Planet' and Comfort Intense now uses 100% recycled plastic.

### IN THE SUPPLY CHAIN

**Hovis** is ensuring that all newly purchased bread baskets used in the supply chain will have 30% recycled content.



#### Case study:

#### Tesco collaboration on recycled food grade flexible packaging

Plastic Energy and SABIC have brought the first recycled food grade flexible plastic packaging to market.

A trial involving these three Pact members has been able to bring to market cheese packaging that contains 30% recycled content from Tesco's front of store trial film

collection points that accept all types of plastic film.

The trial demonstrates for the first time that flexible plastics (like cheese packaging) can be recycled into safe food-grade packaging.

The trial involved an entire supply chain collaboration with a food manufacturer, retailer, packaging manufacturer and a non-mechanical recycling plant working together to create this closed loop system.

Including recycled material in food grade flexible plastic packaging

has been a challenge for the industry up until this point due to the limitations of traditional recycling techniques. The pyrolysis non-mechanical recycling process overcomes this issue.

This trial demonstrates that by taking an innovative and collaborative approach, new solutions can be found to take plastics from front of store collection points to a food-grade packaging format.

# GLOBAL CHANGE



## The UK Plastics Pact is setting a precedent for collaborative and systemic change across the globe.

Eight national Pacts and one regional Pact now exist, with many supported by WRAP, as part of the Ellen MacArthur Foundation's New Plastics Economy working towards a circular economy for plastics. Here are some examples of where the Pact is being introduced internationally.

### SOUTH AFRICAN PLASTICS PACT

The South African Plastics Pact was launched in January 2020, initiated by WRAP, WWF South Africa and SAPRO (South African Plastics Recycling Organisation).

SA Plastics Pact is only the third Pact (after UK and Chile) to have a roadmap developed, and its success has helped WRAP secure funding to develop Plastics Pacts in India, Malaysia and Ghana.

Its approach and model has been shared with other African networks to help stimulate further work on the circular economy.

### CIRCULA EL PLÁSTICO – CHILEAN PLASTICS PACT

WRAP support to Fundacion Chile was key in helping to adapt the Plastics Pact model to Chile, as well as the definition of their targets. We held a week of intervention in November 2019, where we supported the businesses and other local members in identifying the main actions that would enable them to move towards the set targets. The outputs of which were incorporated in their roadmap launched in January 2020.

### EUROPEAN PLASTICS PACT

The European Plastics Pact is the first regional pact to join the growing global Plastics Pact network. Launched in March 2020 in Brussels, this Pact brings together 17 governments and over 70 businesses in Europe to tackle pressing cross-border issues in order to facilitate quicker progress towards a circular economy for plastic in Europe. The European Plastics Pact has set ambitious common targets to 2025 which are connected to the Pact's four working groups: reusability and recyclability; responsible use of plastics; collection, sorting and recycling; use of recycled plastics.

WRAP runs the Secretariat for the European Plastics Pact, co-ordinates and supports the technical working groups, and will establish the monitoring and reporting mechanisms to track progress.

# HOW WE WORK

**The UK Plastics Pact was the world's first initiative to bring together the entire plastics value chain along with governments and citizens to accelerate more circular use of plastic packaging materials – to achieve four ambitious and measurable targets.**

These changes require systemic change and only by working in collaboration with each other can this be achieved.

**We bring like minds together, fostering relationships and knowledge sharing to find solutions to some of the biggest challenges we face in pursuit of the targets. And these groups feed into outputs for The UK Plastics Pact to cascade good practice and knowledge beyond the direct members.**

## COLLABORATION

Sharing ideas, knowledge and creating supply chain partnerships and solutions in a pre-competitive space is key to the success of the Pact.

WRAP brings together Pact members across a series of Collaborative Action Groups each with specific aims.

Collaborative action groups have included:

- Citizen engagement
- Reuse and refill
- Plastic film collections
- Non-mechanical recycling
- End markets for plastic film
- Recycled content



## HOW WE WORK

### CHANGE THAT WOULD NOT HAVE HAPPENED WITHOUT THE PACT

Within The UK Plastics Pact membership there is a hive of activity and collaboration and this is also replicated outside of the Pact membership with other work and initiatives aligning with our targets and ambition.

This includes: the many Collaborative Action Groups which bring members together to focus on key issues – sharing knowledge and ideas to overcome barriers; the development of best practice guidance and evidence for change; agreeing and coordinating engagement with citizens to promote positive behaviour change; and engaging closely with governments to support critical policy developments and ensure that public funding is focused in the right areas.

Our supporting members and their initiatives are also delivering programmes of work that align with and help us achieve our targets.

### WORK THAT SPANS OUR FOUR TARGETS

All the activities are interconnected and often span more than one target to deliver progress on circularity across the supply chain:

- Developing a list of items considered problematic/unnecessary is driving focused effort by businesses, not just around the 8 items for elimination but also the longer list of items under investigation encompassing a wide range of actions that are needed to tackle the underlying issues.
- Shared learning on reuse and refill models assists with identifying scalable solutions and targeting funding to tackle the barriers.
- The Smart Sustainable Plastics Packaging Challenge Fund has adopted the Pact targets to focus £60m of investment in innovation where it is needed the most.
- Stakeholders from across the plastics value chain have convened to agree a Roadmap to flexible plastic packaging recycling – a strategy that all members can align with so we're all pulling in the same direction.
- The ambition of the Pact is helping to drive momentum and support in the development of critical government policies.
- Developing the case for non-mechanical recycling, ensuring that in the future it will be recognised as part of the solution, particularly for flexible plastic recycling.
- Best practice design guidance drives improved material quality to ensure more plastic packaging is recycled back into plastic packaging.

# £60M

The Smart Sustainable Plastics Packaging Challenge Fund has adopted the Pact targets to focus £60m of investment in innovation where it is needed the most.

## HOW WE WORK: WHAT DO SOME OF OUR PACT MEMBERS SAY?

“

We value our involvement with The UK Plastics Pact for a number of reasons – not least the ability to share in the experience of others involved and learn from their insight – and there is clearly value in the momentum created by dozens of businesses and organisations working to common goals.

We also know that our customers and partners are increasingly interested to talk with us about our work to be more sustainable and their recognition of The UK Plastics Pact is a part of that.

”

**Jamie Weall, Head of Compliance at Aston Manor**

“

At Britvic we believe in creating a world where great packaging never becomes waste. We know we can't achieve this vision on our own. As a founding signatory of The UK Plastics Pact back in 2018, the Pact has helped to shape our strategy and we are proud to stand with customers, consumers, suppliers and government in doing our bit to bring about real change.

This year we have committed to switching all our bottles in Great Britain to 100% recycled plastic by the end of 2022 and we continue to support a well-run Deposit Return Scheme to encourage even more recycling.

”

**Sarah Webster, Director of Sustainable Business at Britvic**

“

At Danone UK & Ireland, we're proud to be founding members of The UK Plastics Pact. We believe that collaboration across the industry is needed to achieve a circular economy for packaging. The Pact has helped bring together members to not only challenge the status quo, but also to co-build solutions that will improve recycling across the region and help to achieve the goals set by the Pact.

”

**Christopher Hillman, Head of Sustainability & Social Innovation, Danone UK & Ireland**

“

To tackle complex issues we know collaboration is key, and The UK Plastics Pact allows for an opportunity to share expertise across industry, across supply chains and create the best solutions to big issues. We are proud of our achievements in the last few years on packaging but know there is more to be done and we can achieve more through sharing knowledge and solutions.

”

**Alison Bramfitt, Nestlé**

“

The collaborative nature of the UK Plastics Pact, bringing together manufacturers, retailers, waste processors and local authorities, means that we can find solutions and enact change at scale.

”

**Owen Johns, Global Corporate Affairs Manager, pladis**



# GLOSSARY OF TERMS

**APET:** Amorphous PET – commonly used for lids, salad trays and other packaging that need to show the product.

**CEFLEX:** A collaborative initiative of a European consortium of companies and associations representing flexible packaging.

**EPS:** Expanded Polystyrene – commonly used for fish boxes and packaging for electrical consumer goods.

**LDPE:** Low Density Polyethylene – commonly used to make carrier bags, bin liners and packaging films.

**NIR:** Near infrared (spectroscopy) – Near-Infrared or NIR detectable black is a pigment that does not contain carbon black but still appears to give the appearance of black plastic. As it does not contain carbon black it does not absorb light to the same degree as traditional carbon black pigments and is therefore detectable by NIR equipment that is used within the recycling sector.

**PCR:** Post Consumer Recyclate – the term used to describe where plastic packaging contains recycled plastic.

**PE:** Polyethylene – the most common plastic. Can be high or low density – see HDPE and LDPE.

**PET:** Polyethylene Terephthalate – commonly used to make bottles and other containers.

**PP:** Polypropylene – commonly used for margarine tubs and microwaveable meal trays. Also produced as fibres and filaments for carpets, wall coverings and vehicle upholstery.

**PS:** Polystyrene – commonly used to make yoghurt pots, foam boxes and egg cartons, plastic cutlery, protective packaging for electronic goods and toys.

**PVC:** Polyvinyl Chloride – used in some applications such as trays and pots.

**rPET:** Recycled Polyethylene Terephthalate – can be used to make many new products, including new plastic bottles, clothing, fibrefill, industrial strapping, sheet and film and automotive parts.

# THANK YOU

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WRAP's vision is a world in which resources are used sustainably. Our mission is to accelerate the move to a sustainable resource-efficient economy through re-inventing how we design, produce and sell products; re-thinking how we use and consume products; and re-defining what is possible through re-use and recycling.

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The UK Plastics Pact is led by WRAP with the support of the Ellen MacArthur Foundation. The UK Plastics Pact was co-created by the Ellen MacArthur Foundation and WRAP to accelerate the transition to a circular economy for plastics in the UK and is one of the Ellen MacArthur Foundation's national and regional implementation initiatives around the world. The opinions expressed, and materials made available, by WRAP or EMF or The UK Plastics Pact signatories do not necessarily reflect the views of the other parties who are not responsible for the same.

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