A ROADMAP TO 2025

— THE UK PLASTICS PACT >>

December 2020

wrap

THE UK PLASTICS PACT

SETTING THE SCENE

The UK Plastics Pact is transforming the way that the UK makes, uses and disposes of plastic. We need to move away from a linear plastics economy towards a circular system where we capture the value of plastics material – keeping plastic in the economy and out of the oceans. The UK Plastics Pact brings together governments, businesses, local authorities, citizens and NGOs behind a common vision and commitment to a set of ambitious targets. WRAP launched The UK Plastics Pact in 2018, working in partnership with the Ellen MacArthur Foundation to create the first national implementation of the vision for a New Plastics Economy.

Nearly 70% of all plastic waste in the UK is packaging, so this is the focus of The UK Plastics Pact.

The targets for 2025 are[1]:

1. Eliminate problematic or unnecessary single-use packaging through redesign, innovation or alternative (reuse) delivery models
2. 100% of plastics packaging to be reusable, recyclable or compostable
3. 70% of plastics packaging effectively recycled or composted
4. 30% average recycled content across all plastic packaging

Reducing the use of unnecessary plastic is critical, however we must guard against changes that adversely affect the environment, consumer safety, product protection and food waste.

Who is involved?

The UK Plastics Pact has approximately 100 business members, representing retail, manufacturing, hospitality, the plastic supply sector, plastic recycling and resource management. Together they represent more than 50% of plastic packaging place on the UK market and are responsible for over 90% of grocery retailers and the majority of brands sold through them. The UK Plastics Pact also around 50 supporting organisations (mainly trade and sector associations, technology and data companies) and all UK governments are behind The UK Plastics Pact. In order to achieve the targets policy intervention is required, however, we should not wait for this.

The Roadmap to 2025

This Roadmap shows what The UK Plastics Pact members and supporters can do on the journey to achieving the targets by 2025. It aims to inspire members and supporters to act, and to galvanise wider action by governments, funders, investors, NGOs and businesses who are not members of The UK Plastics Pact. Achieving the targets will bring huge benefits for the UK, however, it will require tough decisions to be made, significant investment and some compromise. This Roadmap is a living document and will evolve in future versions.

Together we can, together we will!

[1] Targets 1, 2 and 4 refer to items or packaging sold by The UK Plastics Pact members and are collective targets. Target 3 refers to all plastic packaging that is obligated under The Packaging Regulations and is measured nationally.

THE UK PLASTICS PACT

PROGRESS AND ACTIVITY

Since the inception of The UK Plastics Pact, WRAP has initiated many activities to ensure members are supported in delivery of the targets. These include setting the direction through developing strategies, providing guidance documents on best practice and enabling participation in citizen engagement activities.

Progress against the targets is detailed in a separate annual report which can be found at wrap.org.uk/ukplasticspact.

As well as engaging with individual members, WRAP has set up many collaborative action groups to focus on topics where solutions are needed the most and challenges need to be addressed.

These groups involve multiple organisations from across the supply chain; topics include reuse/refill, plastic film/flexibles, end markets and recycled content.

WRAP continues to provide information to the media, fielding many enquiries on this critical and high-profile topic.

TARGET 1

400 MILLION ITEMS

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

TARGET 2

64%

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

TARGET 3

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

50%

in 2019.

TARGET 4

Average recycled content has increased from 9% in 2018 to

13%

in 2019.

THE UK PLASTICS PACT
KEY OUTPUTS

TARGET 1

- We have developed **criteria for problematic/unnecessary** plastic packaging items and a **list of items** to be eliminated or investigated
- We have developed a new brand **'Clear on Plastics'**, a citizen information channel designed to give citizens the information they need to make informed and sustainable choices

TARGET 2

- We have designated **what is classed as recyclable** for rigid plastic packaging and worked with OPRL to update **packaging recycling labelling** rules
- We have developed guidance to reflect what is classified as recyclable in our **Polymer Choices** guidance
- We have developed **'top tips' for design** for recyclability of rigid plastic packaging in conjunction with RECOUP
- We are working with CEFLEX to develop **design guidance for film/ flexibles**
- We have developed guidance on **compostable plastic packaging** to identify the circumstances when such packaging may be appropriate

TARGET 3

- We have developed a **strategy for films and flexibles and a Roadmap** to deliver it
- We have worked with UKRI on the **Smart Sustainable Plastic Packaging fund (£60 million)** which has been designed to support the delivery of Pact targets
- WRAP has administered government grant funding to support innovation and **critical recycling infrastructure**
- We have engaged with **investors,** for example through an event in collaboration with the British Plastics Federation
- WRAP has and continues to work with government to **support policy development**
- We keep abreast of market economics and share this intelligence through **Market Situation reports**
- WRAP continues to engage with citizens on recycling through its hugely successful **Recycle Now brand.** Plastic specific campaigns and behaviour change interventions have been undertaken to influence recycling behaviours, and Recycle Week received its best ever results in 2020

TARGET 4

- We have developed a **strategy to achieve 30% recycled content**
- We have developed a report on the **role of non-mechanical (chemical) recycling**
- We have identified and **showcased** areas where more recycled content could be incorporated
- We have developed guidance on the use of **jazz in PET trays**

ROADMAP FOR TARGET 1 (THE UK PLASTICS PACT MEMBERS)

ELIMINATE PROBLEMATIC OR UNNECESSARY SINGLE-USE PACKAGING

1

BY END 2021

KEY OUTCOMES

- Initial list of polymers/items identified for elimination phased out for some items there may be technical, economic or practical reasons why it is not possible to meet the target deadline, including impact from Covid-19
- Problems associated with items under 'Investigation' are being mitigated
- Momentum maintained by identifying further items for elimination
- Improved awareness and understanding across all stakeholders, including citizens, of the complexities and environmental impact of packaging choices

KEY ACTIVITIES

- Action plans being implemented by members on items identified for elimination and investigation
- Further research on the implications of packaging and material choices
- List of items for elimination and investigation reviewed and updated
- Citizen engagement on the complexity of packaging choices

BY END 2023

KEY OUTCOMES

- Solutions adopted for plastic items outlined for elimination and investigation
- Sustainable system thinking is embedded within business product design and delivery processes
- Evidence that good practices and solutions are widely adopted by citizens
- Higher levels of understanding of packaging choices across all stakeholders including citizens

KEY ACTIVITIES

- Continued action by members on plastic items identified for elimination and investigation
- Review of criteria for 'problematic or unnecessary' and list of materials/items reviewed
- Systems for packaging choices are reviewed to consider sustainable product delivery (2022)
- Business engagement with citizens to ensure that actions taken to address problematic items are widely adopted

BY END 2025

KEY OUTCOMES

- All items outlined for elimination are eliminated
- Evidence that the reasons leading to plastic items being classified as problematic have been addressed

KEY ACTIVITIES

- List of materials/items reviewed

ROADMAP FOR TARGET 2 (THE UK PLASTICS PACT MEMBERS)

100% REUSABLE, RECYCLABLE OR COMPOSTABLE PACKAGING[1]

2

BY END 2021

KEY OUTCOMES

- Increased awareness and understanding on the potential for reuse/refill across industry
- Citizens take part in new reuse/refill system trials
- Packaging is redesigned to enable it to be recycled back into packaging where technically possible
- Reduction in the use of multi-material incompatible plastic packaging
- All new packaging is designed to be reusable, recyclable or compostable depending on available collection systems and adheres to good practice guidance

KEY ACTIVITIES

- A Pact strategy for reuse/refill is developed
- Brands and retailers run further reuse/refill trials or have plans in place to do so. Lessons learned are cascaded
- Guidance on which materials are classed as recyclable updated, and OPRL rules amended accordingly (ongoing)
- Members review key industry recyclability guidance and align as far as possible
- Strategies are in place by brands and retailers to address all non-recyclable packaging
- Recycling labels are reviewed to ensure compliance with guidance. Front of pack messages are added where possible
- Continuing staff training and supply chain dialogue to update understanding of 'recyclable and compostable'

BY END 2023

KEY OUTCOMES

- Reuse/refill systems are becoming more visible and widely used
- All rigid packaging complies with design guidance for what is classified as recyclable/ compostable (2022)
- All flexible packaging complies with design guidance for what is classified as recyclable/compostable (2023)
- All primary packaging is clearly labelled to assist citizens to correct dispose/reuse/recycle/compost, as far as possible by 2022[2]
- Extended Producer Responsibility and The UK Plastics Pact definitions and measurement systems align as appropriate

KEY ACTIVITIES

- Each member retailer or brand has completed at least one trial on innovative reusable packaging, including secondary packaging (2022)
- Refill/reuse systems are increasing in scale and being promoted through multiple citizen facing channels

BY END 2025

KEY OUTCOMES

- Reuse/refill systems are more mainstream
- All plastic packaging can be placed in the recycling/ composting

KEY ACTIVITIES

- Each member retailer and brand has commercialised at least two innovative reusable packaging systems

[1] For packaging to be classified as recyclable or compostable, this must be in practice and at scale.

[2] To be updated to incorporate outcome of mandatory labelling following government consultation.

ROADMAP FOR TARGET 3 (UK)

70% OF PLASTIC PACKAGING EFFECTIVELY RECYCLED OR COMPOSTED[1]

3

BY END 2021

KEY OUTCOMES

- Front of store recycling points/film take-back schemes are consistent, highly visible and used by citizens. Citizens know where to get information on recycling points using the WRAP Recycling Locator
- Increased capacity for UK processing, including plastic film
- Increasing % of citizens starting to recycle or recycling more items more regularly
- Improved end market potential, particularly in plastic film

KEY ACTIVITIES

- Strategy completed including review of recycling rates by polymer and format
- Investment in new and upgrading of existing UK infrastructure
- Large scale multi-channel campaign aimed at motivating citizens to use plastic film front of store recycling facilities under the Recycle Now brand
- Waste management companies adhering to recycling guidelines by WRAP and OPRL e.g. lids on plastic bottles
- Best practice guidance on kerbside collections of film developed
- Barriers addressed to ensure that non-mechanical recycling is counted towards recycling

BY END 2023

KEY OUTCOMES

- Kerbside collection service provision for plastic film/flexibles is increasing
- Correct participation of plastics recycling by household and businesses growing
- Plan agreed to provide comprehensive infrastructure and promotion of on-the-go (OTG) packaging recycling
- Increased UK sorting and recycling capacity, including non-mechanical recycling and PET tray to tray
- New end markets in place for packaging and non-packaging applications
- Disposal routes are clearly defined to ensure that materials end up in the right treatment process and material quality is improved
- Enhanced sorting capabilities improve supply of high-quality material

KEY ACTIVITIES

- Support to local authorities and waste management sector to increase municipal collections, including film (2022)
- Consistency and DRS policies drive collection rates and funds from Extended Producer Responsibility are targeted at critical infrastructure and communications[2]
- Scale up the most viable new market opportunities, including investment support
- Large scale citizen engagement, interventions and campaigns across all recyclable plastic packaging, with focussed effort
- Innovative approaches to sorting plastics are rolled out

BY END 2025

KEY OUTCOMES

- UK plastics recycling rate hits 70%
- Significant increases in UK reprocessing of plastic packaging, reducing reliance on exports
- An additional c. 1 million tonnes of plastic packaging handling/sorting capacity in the UK
- Citizen recycling behaviour is a social norm – at home, work and on the go
- Latest digital technology adopted to promote recycling

KEY ACTIVITIES

- Funds from producer responsibility are sustaining investment
- Market signals are encouraging significant financial investment into the sector

[1] In accordance with national reporting.

[2] Subject to government timescales.

ROADMAP FOR TARGET 4 (THE UK PLASTICS PACT MEMBERS)

30% AVERAGE RECYCLED CONTENT IN PLASTIC PACKAGING

4

BY END 2021

KEY OUTCOMES

- Average recycled content across the Pact is 19%
- Plastics tax drives inclusion rates
- New packaging design aligns with best practice guidance resulting in greater quantities of high- quality material
- Retailers and brands specify recycled content in packaging at the highest levels in line with technical limitations and market availability in new/relaunched products
- Food grade recycled polyolefins begin to become available for packaging applications through non-mechanical recycling developments albeit limited
- Where coloured plastic is used e.g. non-food HDPE, recycled jazz is increasingly used back into packaging

KEY ACTIVITIES

- Reported data and market projections are reviewed to support forward plan of activities
- Definitions and measurement are checked for alignment with Government
- Innovation projects including:
  - Increasing use of rHDPE, rPP & rPET jazz into packaging
  - Food grade rPP
  - PET tray to tray recycling.
- Strategic supply partnerships provide quality recycled material to the UK packaging sector

BY END 2023

KEY OUTCOMES

- Average recycled content across the Pact is 23%
- Inclusion of recycled content increasing
- PET trays fully utilise recycled tray material rather than bottle material
- Mechanically recycled PP starts to become available for food contact applications
- Recycled jazz plastic widely used in packaging
- Non mechanical recycling allows increasing use of recycled content in films
- Retailers and brands specify recycled content n packaging at the highest levels in line with technical limitations and market availability across all products

Recycled content target % by key formats:

- PET bottles – 22–28%
- Milk bottles – 30–35%
- PE bottles – 20%
- PET trays[1] – 50%
- PP PTTs – 30%
- PE & PP film – 7%

KEY ACTIVITIES

- Target strategy periodically reviewed
- Additional installed capacity enables increased availability of recycled content
- Review of data is used to plan key forward activities
- Research benefit and impact of standardised recycled content labelling and include if/where appropriate (2022)
- Citizen engagement to drive understanding and acceptance of recycled content

BY END 2025

KEY OUTCOMES

- Average recycled content across the Pact is 30%
- Food contact recycled content available for all target materials
- Recycled content in all products sold by UKPP members as is technically possible
- Rates of inclusion continually increase
- DRS provides a high-quality material that drives circularity
- Quality and quantity of recycled content continues to increase

Average recycled content target % by key formats:

- PET bottles – 50%
- Milk bottles – 50%
- PE bottles – 40–45%
- PET trays[1] – 35–40%
- PP PTTs – 50%
- PE & PP film – 10%

KEY ACTIVITIES

- Waste and recycling sector members have installed additional capacity to achieve targets
- Innovation projects push the boundaries of previous technical limits

[1] It is predicted that PET tray recycled content will fall as a result of more bottle flake being used back into plastic bottles following DRS introduction.

CHALLENGES AND SOLUTIONS

TARGET

1 Eliminate problematic or unnecessary single-use packaging

CHALLENGES

- Rejection of alternative solutions by some citizens.
- Timescale needed to implement changes that require innovation and equipment changes.
- Pressure to switch to non-plastic materials with adverse environmental consequences.
- COVID-19 causes delay.
- Costs of change.
- Specific challenges exist for some products, notably pharmaceutical packaging that requires registration.

POTENTIAL SOLUTIONS

- A range of solutions are likely to be needed.
- Trialling alternatives and exploring reuse/refill delivery models.
- Explain and communicate the changes to staff and customers to ensure positive buy-in.
- Developing and sharing evidence on the environmental considerations.
- Acknowledge where it will take longer, but ensure that a timetable is still set.
- Extended Producer Responsibility is likely to drive change in laggards.
- Innovation within pharmaceutical sector and/or extended timetable to tackle problematic packaging.

TARGET

2 100% reusable, recyclable or compostable packaging

CHALLENGES

- Ensuring that recyclability design does not compromise performance, leading to increased food waste.
- Ensuring innovations in packaging and sorting techniques are not stifled.
- Marketing teams desire for 'unrecyclable' packaging (e.g. black) in iconic and multi-market packs could affect progress.
- Short-term costs of moving to more recyclable plastics.
- Slow-selling and seasonal packaging may take longer to change.
- Slow progress on reusable packaging due to the significant investment and behaviour change needed.
- Misconceptions by citizens of what the 'right thing' is.
- Some packaging may not be able to fulfill functionality and be suitable for any form of recycling/ composting route.

POTENTIAL SOLUTIONS

- Regular review and updating of guidance.
- Embed good practice within business policies, training and specifications, mandating the changes in all new and existing packaging.
- Innovation projects and guidance to inform where the solution to recyclability lies; alternative design or innovation in collection, sorting or reprocessing.
- Initiate new activities to stimulate new reuse models.
- Use an evidence-based approach to consider key opportunities for compostable packaging.
- Training and knowledge building for commercial, category and technical teams.
- Citizen engagement to improve understanding on the environmental considerations.
- Clear understanding of technical limitations of recycling processes mapped against packaging portfolios. Alternative solutions identified and implemented.

CHALLENGES AND SOLUTIONS

TARGET 3

70% of plastic packaging effectively recycled or composted

CHALLENGES

- Consistency across all local authorities, which requires major investment and changes to long-term contracts.
- Economics of recycling versus other disposal options including energy from waste.
- Weak end markets for lower grade plastic.
- The major increase in sorting and recycling capacity will need planning, funding and installing in relatively short timescales, including development of non-mechanical recycling.
- Lack of practical collection, recycling or composting system for consumer films.
- Contamination and poor material quality as a result of the wrong type of plastics ending up in the wrong treatment infrastructure.
- Poor motivation and citizen confusion on what is/is not recyclable or compostable.
- Poor on-the-go (OTG) recycling (infrastructure and citizen interaction).

POTENTIAL SOLUTIONS

- The resource management sector, major businesses and the investment community working together with local authorities to increase capacity and create end markets.
- Extended Producer Responsibility drives the market towards better design and recycling.
- Consistency and EPR policies help overcome collection, sorting and treatment infrastructure particularly for films and compostables.
- Significant investment and innovation in film recycling.
- Clearly defined and managed disposal routes ensure high quality material and reduced costs.
- Sustained support for citizen engagement on recycling and mandatory labelling.
- Packaging designed to be recyclable or compostable.

TARGET 4

30% recycled content in plastic packaging

CHALLENGES

- Lack of investment for increased UK recycling capacity restricts supply (and affordability) of recycled content.
- More packaging convertors will need the ability to utilise recycled content.
- Improved sorting and detection technology to enable food grade recycled content to be developed in more applications.
- Investment required to open new recycled content opportunities e.g. for films and PP rigids.
- Management systems will be needed to ensure that non-mechanical recycling output can be attributed as recycled content.
- Food contact legislative constraints.

POTENTIAL SOLUTIONS

- The UK Plastics Pact members send strong early signals on recycled content requirements sent to the market, creating demand-pull that helps with investment decisions on recycling infrastructure.
- Government policy drives increased demand for recycled content.
- Utilise flagship projects to tackle the barriers to improved sorting, recycling, and use of recycled content.
- Implement packaging design changes to improve the economics and quality of recycled material.
- Engagement with government to advance non-mechanical recycling guidance.

ACTION REQUIRED

The UK Plastics Pact members are being asked to:

- Embed targets and interim milestones in corporate and organisational targets.
- Review packaging ranges and portfolios to identify opportunities to improve recyclability, recycled content, and consumer messaging in accordance with good practice guidance.
- Develop clear accountability internally; provide objectives and training to category, procurement and technical teams.
- Support consumer behaviour change on recycling and reuse, through corporate and brand channels.
- Initiate new partnerships for innovation with suppliers, customers, funders, local authorities and technology providers.
- Work with suppliers to obtain accurate data for tracking and reporting progress.
- Review own operations and practices to ensure they support The UK Plastics Pact targets.
- Publicly report actions and progress.
- Communicate successes to consumers, colleagues and externally.

WRAP commits to:

- Support members in developing their own action plans to support The UK Plastics Pact targets.
- Report on progress of The UK Plastics Pact targets and activities undertaken by the members and promote successes.
- Convene members to tackle obstacles where collaboration is needed.
- Develop and share good practice guidance to set a clear direction of travel.
- Review targets and activities in light of policy changes and reforms.
- Support local authorities to maximise the collection of plastic packaging.
- Continue to engage directly with citizens through the Recycle Now campaign.
- Develop a dedicated campaign to support citizens in their desire to reduce their own use of plastic and the impact plastic waste has on the environment.
- Continue to be the key 'go to' organisation for independent evidence-based research, and strategic direction.

CONTACT

THE UK PLASTICS PACT

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 reuse and recycling.

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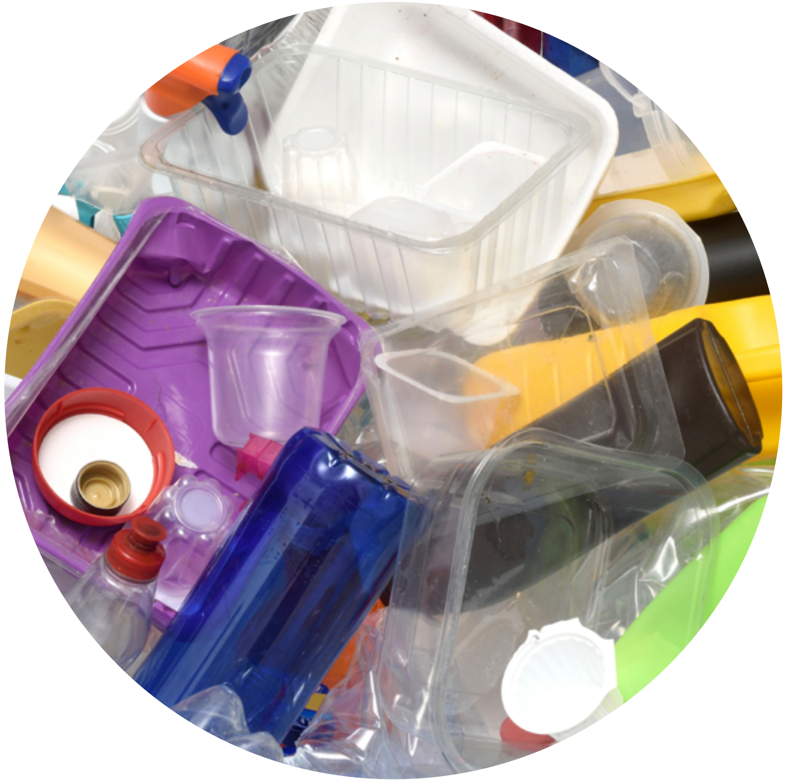

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