A ROADMAP TO 2025

— THE UK PLASTICS PACT »

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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 April 2018, working in partnership with the Ellen MacArthur Foundation (EMF) 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 plastic is critical – by avoiding unnecessary packaging, eliminating non-recyclable packaging, encouraging reuse and switching to other materials or business models where beneficial. However, we must guard against changes that adversely affect greenhouse gas emissions, consumer safety, product protection and food waste.

Who is involved?

The UK Plastics Pact has 79 business members, representing retail, manufacturing, hospitality, the plastic supply sector, plastic recycling and resource management. Together, WRAP estimates these members are responsible for over 80% of the plastic packaging on products sold through UK supermarkets, and approximately 50% of the total plastic packaging placed on the UK market. The UK Plastics Pact also has 39 supporting organisations (mainly trade and sector associations, technology and data companies) and Defra, the Welsh Government and the Scottish Government are all behind The UK Plastics Pact[2]. 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 to deliver The UK Plastics Pact targets, with key outcomes by the end of year 1 (April 2019), end-2022 and end-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 UK plastic packaging including household, commercial and industrial.

[2] Membership figures correct as of August 2019. The Roadmap is subject to modification including to reflect any changes made to The UK Plastics Pact targets.

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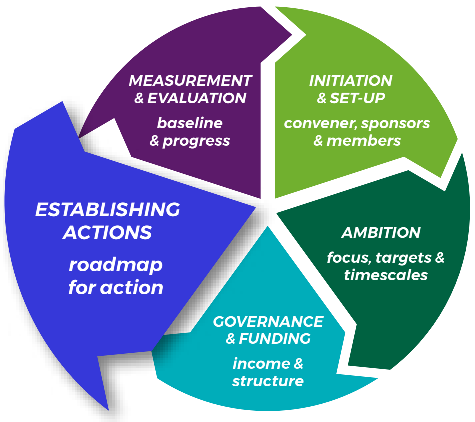
PROGRESS TO DATE

Collaborative action is at the heart of The UK Plastics Pact, and mobilisation is in five stages. The first priorities were the initiation and ambition that WRAP agreed with EMF, leading businesses and UK governments ahead of launch. An Advisory Group guides the strategic direction of The UK Plastics Pact, and its current members are Tesco, M&S, Ella's Kitchen, ABP Beef, Veolia, Plastipak, EMF, Local Government Association, Defra and Greenpeace.



Amongst other activities, four work streams (collaborative action groups) have been initiated, focusing on:

Measurement and reporting – agreeing how to report characteristics of plastic packaging placed on the UK market by members, from a 2017 baseline. Baseline data is being prepared and individual actions plans are being developed.

Recyclability – defining criteria and guidance for recyclable, reusable and compostable plastic packaging and agreeing what is 'good' in terms of packaging design choices (e.g. polymer and decoration choices). Also, considering how to embed this across businesses and inspire good practice.

Problematic & unnecessary single-use plastic items – developing criteria for 'problematic & unnecessary' and considering how these problems could be solved e.g. through elimination, reuse models, design, recycling infrastructure, education etc.

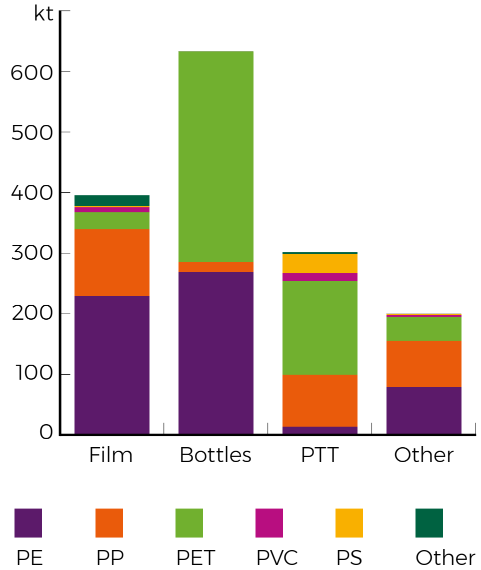
Film & flexibles recycling – films comprise 26% of all consumer plastic packaging by weight and even greater by item. This group will focus on (i) front of store collections; (ii) kerbside collections; and (iii) end markets. WRAP has initiated trials to identify markets for recycled PE/PP film.

We have initiated The UK Plastics Pact without having identified all the solutions to achieve the targets – research and innovation will be essential. WRAP is exploring various sources of innovation funding to support flagship projects that address key barriers to a more circular plastics economy.

These targets will not be achieved without citizens playing their part. WRAP has refocused its Recycle Now campaign onto plastic packaging and developed a new campaign toolkit for partners. The focused plastics campaigns have reached more than 17.5 million people in 2018. Engaging citizens on prevention and reuse will form part of a new citizen engagement strategy.

Examples of The UK Plastics Pact member activity in the first six months are available here.

UK consumer plastic packaging composition by format and polymer



PTT = pots, tubs and trays.

Other = caps, pumps, lids, tubes, blister packs, wrappers, clothes hangers etc.

PE data is all high density, low and medium density
Source: Plasticflow 2025.

Significant advances in recycling of films and pots, tubs and trays (PTT) are required to meet The UK Plastics Pact targets.

ROADMAP FOR TARGET 1 (THE UK PLASTICS PACT MEMBERS)

ELIMINATE PROBLEMATIC OR UNNECESSARY SINGLE-USE PACKAGING

1

BY APRIL 2019

KEY OUTCOMES

- Identify materials/items commonly regarded as problematic based on agreed criteria* (likely to be tackled in phases** with ongoing review).
- Initial phase solutions adopted by Pact members or plans in place to do so.
- Plan and timetable in place for later phase materials/items.

KEY ACTIVITIES

- Publish criteria, along with a list of items and options to tackle them.
- Initial phase of materials/items reviewed with suppliers and the actions required to tackle them identified.
- Internal systems set up to measure and report progress against the target.
- Packaging supply chain help Pact members to identify alternative solutions.
- WRAP develops strategy to engage citizens to help play their part in delivery of the Pact targets.

BY END 2022

KEY OUTCOMES

- Solutions adopted for all identified materials/items in UK operations.
- Evidence that it is becoming a social norm to adopt these solutions.
- Identified list of materials/items reviewed to ensure ongoing improvement.

KEY ACTIVITIES

- All materials/items reviewed with suppliers and actions required to tackle them identified.
- Adoption of high profile citizen engagement campaigns and interventions.

BY END 2025

KEY OUTCOMES

- Items originally identified as highly problematic, are no longer considered to be so.

KEY ACTIVITIES

- Criteria for 'problematic' and list of materials/items reviewed.

*The criteria to include: avoidable, inability to recycle/compost, reuse alternatives, leakage into the environment, cause of contaminations.

**Phases will be based on impact and ability/time to influence.

ROADMAP FOR TARGET 2 (THE UK PLASTICS PACT MEMBERS)

100% REUSABLE, RECYCLABLE OR COMPOSTABLE PACKAGING

2

BY APRIL 2019

KEY OUTCOMES

- Consensus on what should be classed currently as 'recyclable' for consumer rigid packaging. This will be reviewed periodically in order to ensure it reflects current materials and infrastructure. Non-recyclable packaging materials are likely to include PVC and PS in food packaging.
- A yes/no labelling system based on the agreed recyclability designations and aligned with OPRL.

KEY ACTIVITIES

- Members review materials classed as not-recyclable and develop plans to tackle them.
- Key opportunities for compostable plastic packaging are explored.
- Recycling sector aligns capability with the recyclability guidelines.
- Innovation projects proposed to design new packs that meet functionality, cost and end-of-life criteria, including reuse models.
- Development of design guidance for the recyclability of flexible packaging.

BY END 2022

KEY OUTCOMES

- Periodic review of what packaging placed-on-market in 2022 is 'recyclable'. Likely outcome:
  - All rigid packaging and bottles comply with the agreed definition of 'recyclable'
  - All packs have yes/no on-pack labelling.
- All new products use packaging that is in line with the recyclability designations and good practice in design.
- Producer Responsibility and The UK Plastics Pact definitions of recyclability aligned.

KEY ACTIVITIES

- Pilots to scale up the most viable new pack designs, especially films and flexibles.
- Each member retailer or brand has completed at least one trial on innovative reusable packaging, including secondary packaging.
- Continuing staff training and supply chain dialogue to update understanding of 'recyclable and compostable'.
- Update waste management contracts and household communications with the revised definition of 'recyclable'.

BY END 2025

KEY OUTCOMES

- Periodic review of what packaging placed-on-market in 2025 is 'recyclable'. Likely outcome:
  - 100% of packaging placed on the market by members complies with the agreed definition of 'recyclable'
  - Reusable systems are more mainstream.

KEY ACTIVITIES

- New pack formats that are compatible with the collecting, sorting, and recycling/composting infrastructure are commercialised.
- Each member retailer and brand has commercialised at least two innovative reusable packaging systems.

ROADMAP FOR TARGET 3 (UK)

70% OF PLASTIC PACKAGING EFFECTIVELY RECYCLED OR COMPOSTED

3

BY APRIL 2019

KEY OUTCOMES

- UK plastic packaging recycling rate boosted from 46% in 2017.
- Clear information for citizens on what can and cannot be recycled.
- Increased sorting/reprocessing capacity for rigid plastic packaging built or planned.
- Improved household PE film collection at large supermarkets. Increased use of this infrastructure by citizens.
- Evidence available from trials on performance of kerbside film collection.

KEY ACTIVITIES

- Initiate innovation projects to address:
  - Collection of films and flexibles
  - Sorting, recycling, composting and reprocessing of existing packaging
  - New markets for recycled polymers.
- Member businesses use Recycle Now campaign in their marketing.
- Market report on possible new end markets.
- Develop high level strategy for films and flexibles.

BY END 2022

KEY OUTCOMES

- UK plastics recycling rate boosted to >58%.
- Highly visible recycling campaign – correct participation growing.
- Policy measures to support municipal collections; all local authorities collecting rigid plastic packaging. Defined route for collecting films is established.
- Plan agreed to provide comprehensive infrastructure for on-the-go (OTG) packaging.
- New sorting and recycling capacity and end markets in place.

KEY ACTIVITIES

- Additional funds from producer responsibility reform are targeted at critical infrastructure and communications.
- Scale up the most viable new market opportunities, including investment support.
- Support local authorities and waste management sector to increase municipal collections.
- High profile citizen engagement, interventions and campaigns.
- Updated design guidance for films adopted by businesses.

BY END 2025

KEY OUTCOMES

- UK plastics recycling rate hits 70%.
- Significant increases in UK reprocessing of plastic packaging
- A minimum of 600kt additional handling/sorting capacity in the UK of plastic packaging for onward recycling.
- Citizen recycling behaviour is a social norm – at home, work and on the go.
- Latest digital technology adopted to promote recycling.
- New technology for recycling/reprocessing low value polymers is operational at a commercial scale.

KEY ACTIVITIES

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

ROADMAP FOR TARGET 4 (THE UK PLASTICS PACT MEMBERS)

30% AVERAGE RECYCLED CONTENT IN PLASTIC PACKAGING

4

BY APRIL 2019

KEY OUTCOMES

Recycled content target % by key formats.* Percentages are average across all members:.

- PET bottles – 14-18%
- Milk bottles – 25%
- PE bottles – 10-15%
- PET trays – 70%
- PP PTTs – 20%
- PE & PP film – 5%

KEY ACTIVITIES

Strategy developed to achieve the targets. Targets reviewed in light of the strategy and policy developments.

Initiate flagship projects identified during development of the strategy.

Retailers and brands specify recycled content to meet guidelines in all new/relaunched products.

Initiate flagship projects such as:

- Sorting, recycling, composting and reprocessing of existing packaging
- New markets for recycled polymers
- Recycled content for food grade PP and PE film.

*Covering primary and transit packaging.

BY END 2022

KEY OUTCOMES

Recycled content target % by key formats:

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

KEY ACTIVITIES

Waste and recycling sector members have installed additional capacity to achieve The UK Plastics Pact targets.

Recycled content specified in all new, relaunched and top-selling products.

Research benefit and impact of recycled content labelling and include if/where appropriate.

Recycled content usage reported externally.

Strategic supply partnerships to provide quality recycled material to the UK packaging sector.

BY END 2025

KEY OUTCOMES

Average recycled content target % by key formats:

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

KEY ACTIVITIES

Waste and recycling sector members have installed additional capacity to achieve targets.

Recycled content in all products sold by members to meet The UK Plastics Pact guidelines.

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.

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.

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 investments needed.
- Specific challenges exist for some products, notably pharmaceutical packaging that requires registration.
- Misconceptions by citizens of what the ‘right thing’ is.

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.
- Innovation within pharmaceutical sector and/or extended timetable to tackle problematic packaging.
- Citizen engagement to improve understanding on the environmental considerations.

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 chemical recycling.
- Lack of practical collection, recycling or composting system for consumer films.
- 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.
- Government leadership and a bold reform of packaging legislation to support the Pact targets.
- Funding to local authorities to support collection expansion.
- Significant investment and innovation in film recycling.
- Sustained support for citizen engagement on recycling.
- 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.
- Confirmation that products from chemical recycling can be attributed as ‘recycled content’ will be required.
- Food contact legislative constraints and uncertainty on future direction.

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.
- Work by the plastics sector with the EU and FSA/EFSA to advance chemical recycling guidance.

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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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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.