THE UK PLASTICS PACT

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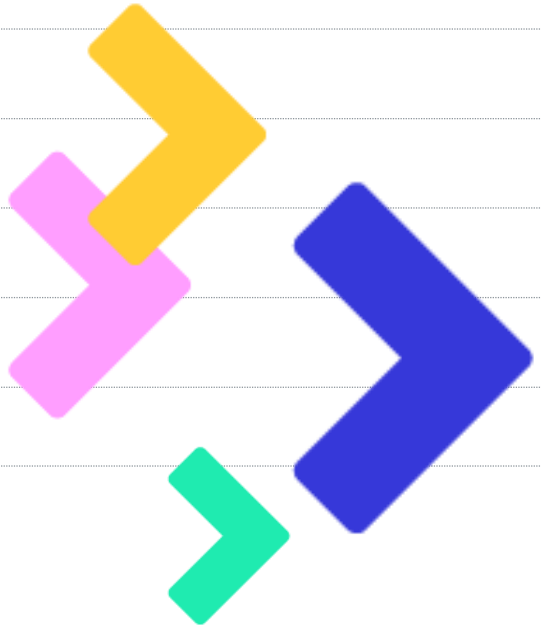
THE UK PLASTICS PACT ANNUAL REPORT

2022-2023

FIVE YEARS OF PROGRESS IN TACKLING PLASTIC POLLUTION

Contents



Foreword

In late 2017 the world woke up to the plastic pollution crisis. The nation was gripped by *Blue Planet II*. Our hearts broke for the mother pilot whale holding her dead calf, the victim of plastics in our oceans. The public reacted with horror and this seismic moment ignited action.

At WRAP we were already in the midst of convening leaders across the public and private sector to tackle the issue, and are proud to have been at the forefront of driving global change alongside many committed organisations.

Fast forward five years from the launch of The UK Plastics Pact in 2018. We have mushroomed from 40 members to nearly 200, and the outlook is markedly different. In the UK we have made great strides towards the Pact's 2025 targets, and inspired others to act. Working with partners we are now tackling plastic pollution in 22 countries through national initiatives such as the Plastics Pacts, and are actively supporting international negotiations for an ambitious Global Treaty to End Plastic Pollution.

We have arrived at this momentous milestone in part thanks to the world-leading action of UK Plastics Pact members. Through collaboration, innovation and sheer grit, against a backdrop of a global pandemic and international conflict, members have striven to change the system and inspire global action.

In five years, we have reduced originally identified problematic items by 99%[1] and the weight of household plastic packaging has reduced by 8%,[2] the same weight as 440 male blue whales.

Recycled content levels have tripled since 2018 and contributed to a 10.5% carbon reduction[2]. 71% of plastic packaging is recyclable and we've pretty much designed-out hard-to-recycle plastics – ready meal aisles are no longer stacked with black plastic trays.

Recycling rates are going in the right direction, now predicted to be 55%, over half of which is now recycled in the UK rather than being shipped overseas. Reasons to cheer.

But we set our targets with an expectation that key policy measures such as consistency (now Simpler Recycling) and Extended Producer Responsibility (EPR) would be in place: key jigsaw pieces in the puzzle of tackling plastic pollution. These haven't yet been implemented, much to

[1] Items 1-5 in the list, based on a paired data set for members reporting in both 2018 and 2022

[2] Based on a paired data set for members reporting in both 2018 and 2022

the frustration of all of us, and this means that we will not meet two of our four targets by 2025.

This isn't reason to slow down. Far from it.

Simpler Recycling provides the recycling industry with more certainty in making important investment decisions around their operations. Crucially, with a timeline. The whole value chain must pull together to ensure that as collections of more types of plastics (including bags and wrapping) are rolled out, what is placed in the recycling is effectively recycled.

Back in 2018 it was the public that demanded action. Our research shows that half the UK population are reporting that they are seeing some differences on supermarket shelves – but it's not enough. 70% continue to be as concerned about plastic waste today as they were in 2018, yet they don't feel as though there's much they can do about it in their daily shopping. They are looking for government and business to lead the way. We must therefore continue to push the boundaries of what voluntary action can achieve and be ready when the policy instruments finally come online. This means removing pointless plastic, designing for circularity (reuse as well as recycling), and creating demand for recycled plastic.

The challenge of plastic bags and wrapping still looms large. The same boldness that retailers have shown in removing non-recyclable black plastic needs to be shown in removing the plastic from uncut fruit and veg – delivering a triple win by reducing plastic, household food waste and greenhouse gas emissions.

We are working hard with Pact members to scale-up reuse and refill, and blueprints are being developed, from standards and hygiene to incentivising behaviour change and effective policy levers. Exciting stuff.

And while we still have a laser focus on 2025, we are also looking ahead to the future, synthesising the implications of global policy and the role of material circularity in delivering on net-zero commitments, with Plastics Pacts across the globe.

We are working with partners around the world to promote a legally binding, high-ambition Global Plastics Treaty that addresses the entire lifecycle of plastics, liaising closely with the Business Coalition for a Global Plastics Treaty to realise its true potential and end plastic pollution for good – prioritising reduction, elimination and reuse.

The Plastics Pact model of public/ private partnerships can be part of the solution for member states to meet mandated obligations under the Treaty. The UK Plastics Pact shows what can be achieved through concerted collaborative effort and illustrates the key role of regulation.

The challenges ahead are huge, but so are the opportunities – to reduce plastics, realise the potential of a circular economy for plastics, and improve the outcomes for people affected by plastic waste around the world.

Harriet Lamb, CEO, WRAP

Delivering international impact

Since launching in 2018 the Plastics Pacts and the Global Commitment have united over 1,000 businesses, governments and other organisations behind a common vision of a circular economy, to stop plastic packaging becoming waste or pollution.

Many of these leading organisations have outperformed their peers – collectively avoiding millions of tonnes of virgin plastics production and related greenhouse gas emissions per year.[3] They have proven that through concerted efforts, meaningful progress is possible – as this UK Plastics Pact progress report illustrates.

Yet the world is off track to stop plastic pollution. The organisations outside The Global Commitment and Plastics Pacts are, on average, performing significantly worse than those who have signed up. Even the latter are expected to miss key 2025 targets.

There are three pivotal hurdles currently preventing progress that must be overcome: scaling reuse, addressing flexible plastic packaging, and establishing infrastructure to collect and circulate packaging supported by EPR policies.

It is clear we need more – and more ambitious – binding policy and regulatory measures, alongside accelerated voluntary business action. It cannot be one or the other. Both parts are crucial.

The Global Treaty on Plastics currently being negotiated offers a once-in-a-generation opportunity to meet the scale of the challenge and accelerate global change. Together with WRAP, The Business Coalition for a Global Plastics Treaty, several Plastics Pacts and many others, The Ellen MacArthur Foundation is calling for an ambitious UN Treaty – based on legally binding global rules and comprehensive circular economy measures – to ensure that all countries and stakeholders act in concert to end plastic pollution.

Sander Defruyt, Lead of The Ellen MacArthur Foundation's Plastics Initiative

[3] The Ellen MacArthur Foundation and UN Environment Programme, *The Global Commitment Five Years In: Learnings to accelerate towards a future without plastics waste or pollution* (2023)

THE UK PLASTICS PACT: HEADLINE PROGRESS

THE UK PLASTICS PACT

TARGET 1

99.6%
REDUCTION IN PROBLEMATIC PLASTIC ITEMS

55%
REDUCTION IN THE WEIGHT OF PROBLEMATIC ITEMS AND MATERIALS

8%
REDUCTION IN THE TOTAL WEIGHT OF HOUSEHOLD PLASTIC PACKAGING

TARGET 2

71%
RECYCLABLE

73%
RECYCLABLE OR REUSABLE

96%
REDUCTION IN HARD-TO-RECYCLE DESIGN COMPONENTS

94%
RIGID PLASTIC PACKAGING IS NOW RECYCLABLE

TARGET 3

55%
EFFECTIVELY RECYCLED

54%
PLASTIC RECYCLED IN THE UK

61%
INCREASE IN MATERIAL RECYCLED IN THE UK SINCE 2018

TARGET 4

24%
AVERAGE RECYCLED CONTENT (UP FROM 8.5% IN 2018)

10.5%
REDUCTION IN CARBON, TAKING 290,000 TONNES CO_2e OUT OF THE ATMOSPHERE

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PACT MEMBERSHIP NOW REPRESENTS OVER **75%** OF ALL CONSUMER PLASTIC PACKAGING

Introduction: a world-first

A world-first initiative to tackle plastic waste

The UK Plastics Pact brings together businesses from across the plastics value chain, as well as UK governments and NGOs, to tackle the scourge of plastic waste. We are creating a circular economy for plastics, keeping them in the economy and out of the natural environment.

The UK Plastics Pact, led by WRAP, is the first of a global network of Plastic Pacts and industry collaborations delivering meaningful impact. In 2017 *Blue Planet II* had focused the minds of consumers on the problem of discarded plastic finding its way into natural habitats, including the sea. In response, the UK government signalled its intention for a series of policies to drive a shift towards a circular economy for plastics.

Together with The Ellen MacArthur Foundation, WRAP took decisive action to convene businesses ahead of regulation and tackle issues surrounding plastic packaging by creating The UK Plastics Pact. By convening businesses from across the entire plastics value chain, as well as organisations from the public and voluntary sectors, the Pact was able to quantify the challenge of reducing plastic waste, and map the path from a wasteful linear economy to a fully circular system. Transforming the way that the UK makes, uses and disposes of plastic.

Since 2018 public interest and media scrutiny have not waned. 70% or more of the UK population[4]:

> Say plastics is an important issue to them.
> Want to reduce the amount of packaging they buy, but feel there is little they can do to follow this through.
> Believe supermarkets should do more to sell loose fresh produce.

[4] WRAP research, unpublished as of November 2023. Publication due early 2024

Driving circularity through four ambitious targets

The UK Plastics Pact set four ambitious targets, designed to support a circular economy for plastic packaging, that can only be achieved through systemic change.

By signing-up to the Pact, members commit to taking action, working together to stimulate innovation, problem-solve, and help build a stronger recycling system in the UK.

UK Plastics Pact Targets

By **2025:**

> **Problematic or unnecessary single-use packaging will be eliminated, through redesign, innovation or reuse**
> **100% of plastics packaging will be reusable, recyclable or compostable**
> **70% of plastics packaging will be effectively recycled or composted**
> **All plastic packaging will include an average of 30% recycled content**

UK Plastics Pact Members

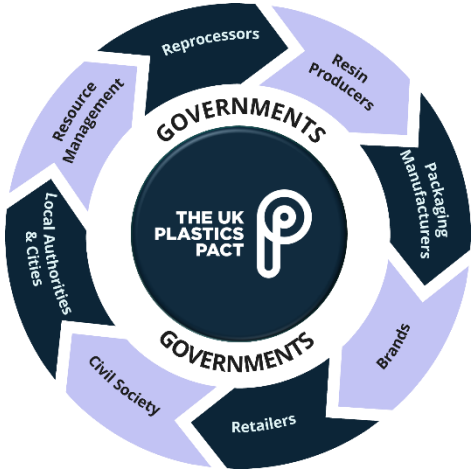
Members of The UK Plastics Pact span the entire value chain from packaging manufacturers through to reprocessing and waste management and both the public and private sector. Every member has a role to play in delivering the targets.

UK Plastics Pact Members breakdown:[5]

107 Full Members, comprised of:
- 14 Retailers
- 63 Brands/Manufacturers
- 3 Hospitality & Food Service Operators
- 17 Packaging Manufacturers
- 10 Waste Management & Reprocessors

34 Associate Members

54 Supporting Organisations



[5] Membership as of 1 November 2023

TARGET 1

99.6%

REDUCTION IN PROBLEMATIC PLASTIC ITEMS

THE UK PLASTICS PACT

Progress towards TARGET 1

55%
REDUCTION IN THE WEIGHT OF PROBLEMATIC ITEMS AND MATERIALS

8%
REDUCTION IN THE TOTAL WEIGHT OF HOUSEHOLD PLASTIC PACKAGING

Progress towards Target 1: eliminating problematic packaging

Eliminating problematic or unnecessary single-use packaging

99.6% reduction in problematic items[6]
55% reduction in the weight of items and materials[6]
8% reduction in household plastic packaging

Items are problematic or unnecessary if they: cannot be recycled; contaminate the recycling system; are commonly littered; or could be avoided or replaced with a reusable alternative.

Since 2018, Target 1 has galvanised industry action on an agreed list of items that are defined as problematic or unnecessary and a timeline for their removal.

As a result, the sale and distribution of these problematic, single-use items fell by 99.6% between 2018 and 2022, meaning that 730 million items are no longer in circulation.[7]

PVC packaging now represents less than 0.2% of all primary packaging reported by members, and has fallen by 82%. Half of the remaining 1,800 tonnes is used for pharmaceutical packaging.[8]

Progress towards removal of polystyrene has been slower with only 25% removed since 2018. However, most members indicate that polystyrene will be removed by the end of 2025, with only 65 tonnes likely to still be in circulation.

The Original Eight:

1. Disposable plastic cutlery
2. Disposable plastic plates & bowls
3. Plastic straws
4. Cotton buds with plastic stems
5. Plastic stirrers
6. Household polystyrene packaging
7. Oxo-degradable plastic
8. Polyvinyl chloride (PVC) packaging.

[6] 99.6% reduction in the number of items 1-5 on the list, 55% reduction in weight on items 1-8 on the list.
[7] Progress towards Target 1 is measured through a paired dataset of 41 members who reported in both 2018 and 2022, as the overall membership has grown since launch.

[8] With strong regulatory requirements associated with pharmaceutical product registration, any change to packaging materials may require extensive re-testing and re-registering of products and packaging, to comply with strict consumer health and safety requirements resulting in a longer transition time

Moves to reduce plastic packaging have also led to an 8% decrease on the amount placed on the UK market since 2018[9].

Extending the level of ambition

The Target 1 list is under regular review to ensure it continues to adapt to the evolving environment and go further, faster than regulation in removing problematic material from the system. The level of ambition was strengthened in February 2022 by adding six additional items for removal by members.

The Additional Six:

1. Plastic wrapping for multi-packs of tins, bottles and cartons
2. PVC clingfilm
3. Non-compostable fruit and veg stickers
4. Non-compostable tea and coffee bags
5. Single use/ single serve sachets and jiggers used in restaurant settings
6. Plastic packaging for some fresh, uncut produce.

Just over 280 billion items on the new list were removed from sale and distribution between 2021 and 2022.[10] In just one year the number of multi-pack wrappers for tins, cans and bottles have reduced by over 62 million.

Reduction of additional items between 2021-2022 by unit, paired data

Item	2021	2022	Change
Plastic wrapping for multi-packs	97,500,000	34,800,000	-64%
PVC clingfilm	37,500,000	6,010,000	-84%
Non-compostable fruit & veg stickers	274,000,000,000	396,000,000	-99%
Non-compostable tea & coffee bags	15,900,000,000	8,810,000,000	-48%
Sachets/jiggers in restaurant settings	243,000,000	80,500,000	-44%
Total	**290,000,000,000**	**8,810,000,000**	**-97%**

What next?

It is predicted that UK Plastics Pact members will have removed all of the items and the majority of polystyrene and PVC from the original elimination list by the end of 2025. The Target 1 list will be reviewed again in 2024 to ensure that it continues to focus attention on tackling problematic and unnecessary single-use plastic.

[9] Based on data reported by members in 2018 and 2022

[10] By those members who reported in both 2021 and 2022

Member action

Lidl GB has launched compostable own-brand tea bags, which will result in up to 800 million bags per year being produced using a plant-based plastic, polylactic acid (PLA). This will ensure that that when they are placed in food waste collections, they will break down in the industrial process rather than result in micro-plastics. The move follows recent announcements by both Asda and Tesco on the introduction of compostable tea bags which means that billions of tea bags can now be industrially composted through kerbside food waste collections.

Sainsbury's whole chicken range is now trayless, following the removal of single-use plastic trays from its packaging. The move has reduced plastic use for the range by at least 50% and is estimated to save 140 tonnes of plastic annually.

McDonald's UK & Ireland has replaced all plastic cutlery, including the McFlurry spoon, with a new paper-based material in all its restaurants, removing 858 tonnes of problematic material a year.

The new cutlery is made from renewable, FSC-certified pressed-paper and is fully recyclable and compostable.

Morrisons has removed expanded polystyrene (EPS) from all small electrical goods and replaced it with moulded paper pulp. The change has removed 26 tonnes of EPS from the market. An EPS compactor has been introduced to the Grimsby processing site to recycle EPS salmon boxes, which are imported from Norway, and for which there are no known alternatives.

PepsiCo UK & Ireland have trialled new multipack packaging for the Snack A Jacks range. Following a £2 million investment in new equipment, packs on shelves in Tesco stores use 86% less plastic on their outer packaging when compared with the previous multipack design. In a first for Snack A Jacks, the new 'bagless' multipack is made from a tape-like strip which holds together five individual packets of Snack A Jacks. Both the outer tape and individual packs can be recycled at front of store collection points

Removing plastic packaging from uncut fresh fruit and veg

19.4% of fresh fruit and veg was sold loose in 2022[11]

Fresh fruit and vegetables make up more household food waste in the UK than any other food type: 1.6 million tonnes of edible fruit and vegetables are thrown away each year, costing £3.8 billion. And they are usually sold in plastic packaging.[12]

Following research into the relationship between plastic packaging and uncut, fresh produce in the UK,[13] WRAP convened an Industry Working Group to develop a Pathway for selling more loose uncut fruit and veg, in line with best practice guidance and targets, with the aim of 30% of all fresh produce being sold loose by 2025, and 50% by 2030.

In 2022 an average of 19.4% of fresh produce sales was loose[11], with the proportion by retailer varying significantly from 2% to 30%. Consumers are therefore currently buying some fresh produce loose, but there is scope for this to increase considerably. 60% would prefer to buy their fresh fruit and veg loose and 55% would buy more of it if it was available in their supermarket.

"Unpacking years of supply chain optimisation focused on selling our fruit and veg wrapped in plastic is no mean feat. But it can deliver significant benefits across food waste, plastic and ultimately CO_2e reduction. That's why WRAP is continuing to focus on this challenge, working across the system to catalyse a moment of transformation for loose produce. To do this we know that we need to collaborate with retailers to tackle supply. We also need to set out a vision for new, effective policy. But none of this will be enough if we don't also inspire citizens and drive demand. While WRAP's surveys show that 60% of people would prefer their fruit and veg loose, our recent ethnographic research makes it clear that more needs to be done to demonstrate the benefits of only buying the amount you need. Creating an aspirational, easy-to-use in-store experience is also essential if we want to change buying behaviour.

Significant reductions in food waste have already been achieved in the UK, much of which is down to retailer action and changes to the way choices are presented to shoppers. This is our next big challenge and this time we can achieve benefits for plastic reduction too."

David Hall,
Director of Behaviour Change,
WRAP

[11] Based on data provided by UK Plastics Pact retail members
[12] FINAL_Pathway to 2025_v8_TS.pdf (wrap.org.uk)
[13] WRAP_Reducing household food waste and plastic packaging

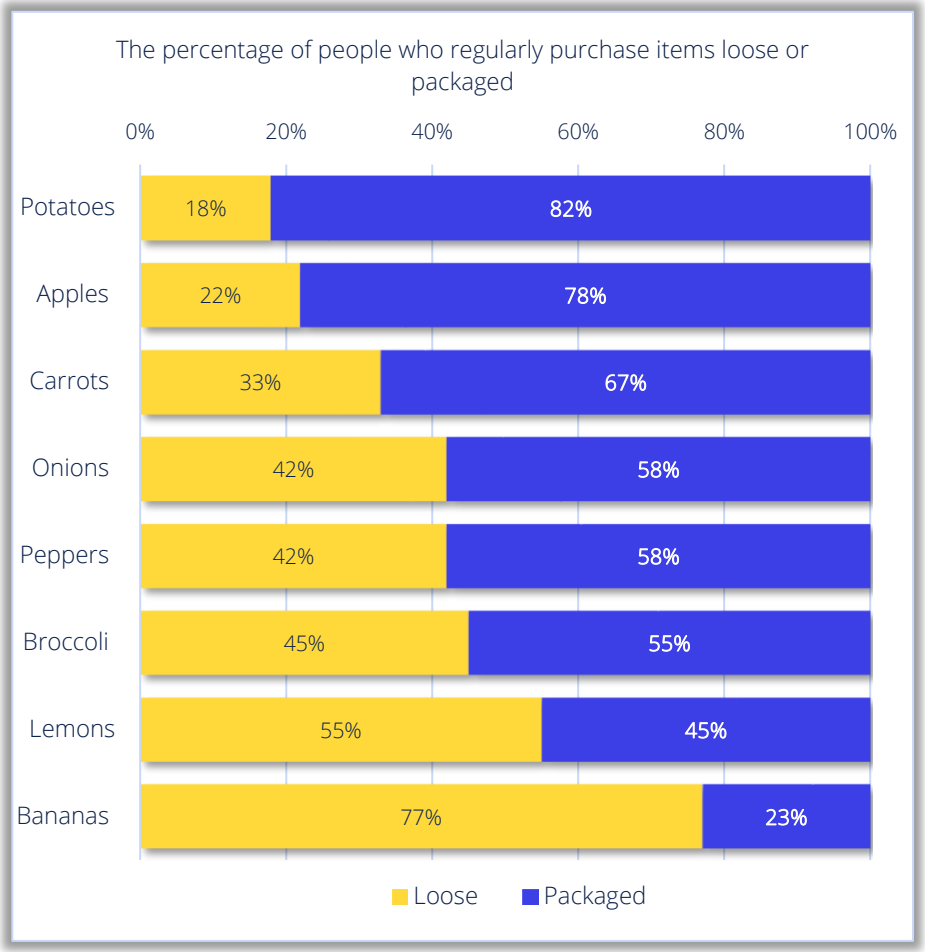
Although loose produce is currently an option in many supermarkets, WRAP's research[14] shows that, based on current regular purchases of key items, there is significant opportunity to increase the purchase to a wider range of items. 24% of consumers regularly buy only one item loose and the most common items purchased loose are bananas and lemons with potatoes, apples, carrots and onions lower down on the list yet high wasted categories.

60% of the UK population would prefer to buy fresh fruit and veg loose

55% would buy more of it if it was available in their supermarket.

If all apples, bananas and potatoes were sold loose:

- **60,000 tonnes** of food waste;
- **8,800 tonnes** of plastic packaging; and
- **80,000 tonnes** of CO_2e could be saved



[14] Currently unpublished

What next?

Implementing the Pathway is not without its challenges, and WRAP is working with industry to overcome the barriers and find solutions.

It's clear that, if we are to achieve a step-change in how fruit and veg is sold in the UK, similar policy drivers to those proposed in the European Union are required. The key to success will be ensuring that any policy is effective, with full engagement from industry on its scope and implementation in order to avoid unintended consequences.

WRAP will be leading on paving the way for effective policy, whilst readying retailers and shoppers for the move to unpacking our fruit and veg aisles. This will involve delving into the supply chain barriers so that retailers can make the move to loose without creating waste further up the supply chain, and working with retailers to enhance the shopper experience by making it easier and more intuitive to buy loose without being, or perceived to be, financially worse-off.

Member action

Aldi is trialling four new loose fruit and vegetable lines to further reduce plastic waste. Items include garlic, limes, lemons and oranges in select stores across the country.

New Pact member Avery Berkel, provider of retail technology and weighing solutions, has integrated produce recognition technology within its customer self-service scale solution. Using Artificial Intelligence, Avery Berkel has enabled retailers to present shoppers with a more user-friendly shopping environment – facilitating the purchase of loose produce for shoppers whilst enabling retailers to broaden their offerings of loose products.

With 10% of sales taking place online, Morrisons is exploring how to provide a loose offering for online shoppers. The biggest barrier is the investment required to introduce weigh scales to the store produce departments, and Morrisons will therefore run a trial in 14 stores, not only to trial loose online, but to understand the additional benefits that weigh scales could deliver through more accurately recording loose waste, being able to mark-down loose produce, and enabling shoppers to weigh their own items, saving time at the checkouts.

TARGET 2

71%

OF PLASTIC PACKAGING IS RECYCLABLE

THE UK PLASTICS PACT

Progress towards **TARGET 2**

73%
RECYCLABLE OR REUSABLE

96%
REDUCTION IN HARD-TO-RECYCLE DESIGN COMPONENTS

94%
RIGID PLASTIC PACKAGING IS NOW RECYCLABLE

Progress towards Target 2: driving up recyclability and reuse

100% of plastic packaging to be reusable, recyclable or compostable

71% recyclable

73% recyclable or reusable

96% reduction in hard-to-recycle design components

94% rigid plastic packaging is now recyclable

71% of all plastic packaging placed on the UK market by UK Plastics Pact members is now recyclable, an increase of 5% since 2018.

Primary packaging (packaging that ends up with households) has gone from 64%[15] recyclable to 69%. This means that an additional 7,000 tonnes[16] of the packaging can now be placed in recycling, which could not in 2018.

To be classified as recyclable, plastic packaging must be collected and effectively recycled at scale. 17% of primary plastic packaging placed on the market in 2022 was comprised of PE and PP film, which, although it is technically recyclable, is only collected by 5% of local authorities, and so does not yet meet the definition. Had household collections for plastic bags and wrapping been rolled-out as originally conceived when the targets were set, 87% of primary plastic packaging would now be classified as recyclable under Target 2.

The biggest gains in recyclability have been made in rigid plastic packaging: due to the reduction of non-recyclable polystyrene and multi-material packaging, 94% of rigid plastic packaging is now recyclable, compared to 81% in 2018, and hard-to-recycle components such as non-NIR-detectable colours and PVC have fallen by 96%.

Members reporting in both 2018 and 2022 have:

- removed over 20,000 tonnes of non-NIR-detectable (e.g. black) plastic from the UK market since 2018, a 96% reduction overall;[17] the same weight as 1,600 double-decker buses;
- reduced multi-material packaging by 45% compared to 2018, with brands and retailers removing 20,000 tonnes from supermarket shelves; and
- reduced the tonnage of unknown or other plastic packaging reported by 27%, due to improved data accuracy.

[15] In the 2021 report we stated the baseline as 66%; this was an error, as it also included transit packaging

[16] Based on members reporting every year from 2018 to 2022

[17] Based on paired data for members reporting for both 2018 and 2022

Breakdown of non-recyclable primary packaging in 2022 compared to 2020

Non-recyclable primary packaging	Tonnes (2022)	2022 %	2020 %
PP film	89,000	9.1%	9.5%
PE film	77,400	7.9%	8.6%
Other/Unknown	55,000	5.6%	7.8%
Multi-polymer film	25,200	2.6%	3.7%
PET film	22,000	2.2%	2.7%
PS	12,900	1.3%	1.5%
Non-NIR detectable	3,550	0.4%	0.5%
Multi-polymer rigid	3,350	0.3%	1.4%
Metal components	2,870	0.3%	0.7%
PVC	1,720	0.2%	0.2%
PVC components	250	0.0%	0.2%

What next for recyclability?

54,000 tonnes of plastic reported by members is classified as 'unknown' or 'other'. Better data is required to understand what this is, and to ensure that it is reported correctly, and that action is taken as appropriate. Improved data accuracy will be driven by EPR.

Small items with a dimension of <40 x 40mm are also challenging to recycle, due to their size. The scale of the issue is difficult to quantify since some items, such as caps on bottles, can be captured for recycling with the main part of the packaging.

Work has been carried out to quantify the tonnage and format of material that falls within the small-formats category, and WRAP has convened industry bodies to consider options for items that fail to make it through the current system.

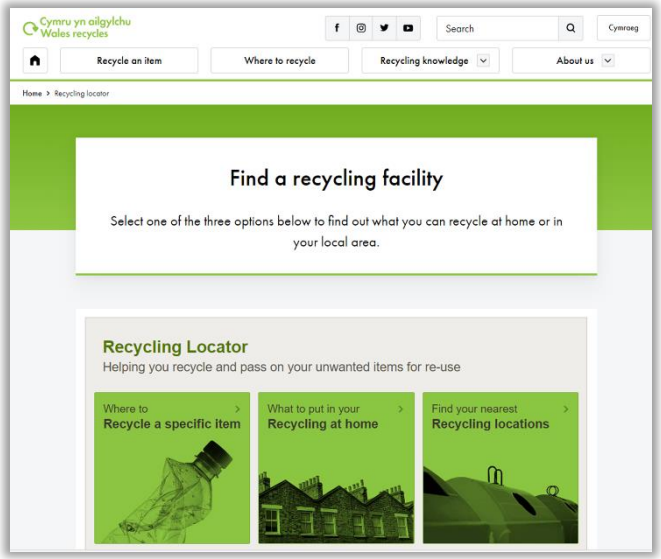
While it is possible for waste management firms to include a secondary filter to capture these items, further work is required to understand whether EPR could fund this separation. Other options include alternative materials, such as paper, where functionality allows and doesn't lead to unintended consequences.

Pact members have been working toward aligning their flexible packaging portfolio with the CEFLEX D4ACE phase 1 guidelines, whilst phase 2 is due to be published in early 2024, with adoption by the end of 2025.

Cutting through confusion

As with all of the efforts made by Pact members to improve recyclability, citizens need to know what they can and can't recycle. WRAP is working through its Recycle Now campaign and with local authorities to educate and motivate citizens to increase recycling. A key resource is WRAP's 'Recycling Locator' which enables people to find out where they can recycle specific items, and many organisations and businesses are signposting to it.

Of the top 20 searches made between August 2022 and July 2023, plastic packaging items occur 12 times, with searches for crisp packets and chocolate wrappers surging since the previous year.



Recycling Locator searches for plastic packaging items between August 2022 and July 2023

No.	Search label	Total Searches
4	Crisp packets and sweet bags	159,000
6	Plastic carrier bags	117,000
8	Baby, pet food, detergent and cleaning pouches	110,000
9	Plastic film lids	107,000
10	Toilet roll wrapping	107,000
12	Multi-pack wrapping	100,000
13	Salad, pasta, and rice bags	100,000
14	Bread bags	98,000
16	Biscuit and chocolate wrappers	96,000
17	Cheese, fish and meat wrapping	96,000
18	Frozen food bags	96,000
19	Delivery bags	95,000

Member action

Danone has removed the label from its Actimel concentrated shot to reduce plastic use and improve the recyclability of the bottle. Since August, Danone's new Actimel bottle has been appearing on store shelves. Gone is the polyethylene terephthalate (PET) label that surrounds the flexible bottle, replaced by a container in which the brand name, vitamins and allergens are embossed directly onto the bottle.
This will save approximately 135 tonnes of plastic per year[18].

Gousto has launched fully recyclable packaging for its Jolly Hog bacon. The flexible thermoform has an 'easy peel' film that's simple for home cooks to use. It is now planning to expand this across all pork products in 2023.

Industry leaders in oral health have set targets to switch over 10 billion*[19] toothpaste tubes worldwide into a mono polymer material by 2025. Haleon, Colgate-Palmolive, Church & Dwight and Procter & Gamble (P&G), have started the transition and will have produced billions of recycle ready mono-material toothpaste tubes by the end of 2023. If emptied by households, these tubes are ready to be captured, and recycled through kerbside collections.

Nomad Foods has redesigned packaging for its stuffing and dumplings products from a multi-material PE/ PP material to a mono-polymer PP.

Kraft Heinz has rolled out a '100% recyclable' cap on its squeezy Tomato Ketchup bottles, moving away from a silicone valve to ensure the whole bottle and cap can now be recycled at kerbside. The move means a potential 300 million plastic caps annually can be recycled, instead of going to waste.

[18] Saving based on 2024 forecast sales figures
[19] This figure is taken from publicly shared targets from Colgate and Haleon corporate websites.

In May 2022, in partnership with Coca-Cola GB, **Coca-Cola Europacific Partners** introduced attached caps on plastic bottles, making it easier to recycle the entire bottle and ensure that no cap gets left behind. The new attached caps are designed to keep all parts of the package together, to make them easier to collect and recycle, helping to prevent litter. To introduce attached caps, they invested more than £7.5 million in their GB manufacturing sites to reconfigure existing lines, with this work due to conclude in 2024.

Improving data

Co-op has created a multi-sided data platform to help automate some of its Environment, Social and Governance reporting, including plastics split by polymer type and category. The platform takes packaging information from the retailer's specification system and purchase data from its replenishment system, and combines them to give accurate, real-time data on the brand's packaging footprints. The platform will help Co-op to report plastics use more accurately using component-level granular details of polymer type, recycled content and pack format. It will also help the retailer to better calculate its obligations under the EPR regulations for packaging, and to better understand the carbon footprint of its own brand packaging materials.

Launched earlier this year, the Open 3P data standard for packaging provides a streamlined and standardised approach to collecting and sharing data, improving data quality whilst reducing administration. It has been developed with a consortium of industry partners, input from over 100 sector stakeholders, and funding from UKRI's Smart Sustainable Plastic Packaging Challenge, delivered by Innovate UK. Data standards improve efficiencies within organisations and across supply chains, supporting effective data-sharing and increasing the accuracy and granularity of available data. The standard is free-to-use and will support better decision-making, allowing businesses to identify innovations that can help them improve circularity, minimise environmental impact and reduce costs.

Reuse – redesigning the system

The scale and impact of reusable packaging in the UK continues to be challenging to quantify. 3,340 tonnes of reusable primary packaging were reported in 2022, and 26,400 tonnes of reusable transit packaging. When including reusable packaging, and non-recyclable material collected and reused or recycled in a closed loop system, progress towards target 2 increases to 73%.

Retailers and brands are trialling and testing reuse and refill options and, by collaborating through the Pact, are sharing insights and expertise. However, we are yet to see reuse or refill delivered at scale in the UK and, if we are to reach our ambitious goal of making reuse mainstream by 2025, we need further collaboration across the value chain, with a long-term holistic vision of the benefits of transitioning to reuse.

In the same way that policy will play a critical role in unpacking fresh produce, it will also pave the way for reuse, and the role of the Pact will be in preparing retailers and consumers for the journey.

Tonnage of packaging recyclable, reusable or recycled through closed loop and film collections

Item	Primary	Transit	Combined
Total single-use (t)	983,000	131,000	1,110,000
Recyclable single-use (t)	682,000	112,000	794,000
Reusable (t)	3,340	26,400	29,700
Closed loop & film collections (t)	8,420	N/A	8,420
Recyclable (%)	69%	85%	71%
Recyclable & reusable (%)	**70%**	**85%**	**73%**

73% of plastic packaging is recyclable or reusable

Consumer participation in reuse is essential

Recent research by City to Sea shows that consumer demand is high; with 69% of respondents indicating they are likely or very likely to try products in returnable packaging if they are available where they shop, but the lack of availability is preventing participation.[20]

Some key behaviours, such as using reusable drinks bottles are extremely common. Research by WRAP indicates there is scope for the behaviours to expand, but lack of availability, choice and certainty is preventing wide-scale adoption and habit-forming.

WRAP research also shows that to increase participation in reuse and refill, retailers need to make pricing clear, help people overcome their uncertainty and apprehension, and make the experience fun and enjoyable. Above all else, participating in reuse and refill needs to become a new social norm.

What next for reuse?

WRAP anticipates a growing emphasis on the role of reusable packaging in evolving national and global policies. To make the system work successfully at scale, collaboration and a long-term holistic vision will be required.

Building on activity undertaken by partners such as The Ellen MacArthur Foundation, and through insights gained through extensive industry engagement, WRAP will develop a reuse and refill packaging industry roadmap and category-level blueprint templates. These will help guide the transition to reusable packaging across a range of high-impact product categories, with careful attention being paid to the customer journey, which is fundamental to the success of scaling-up.

Image from Asda refill behaviour change interventions pilot

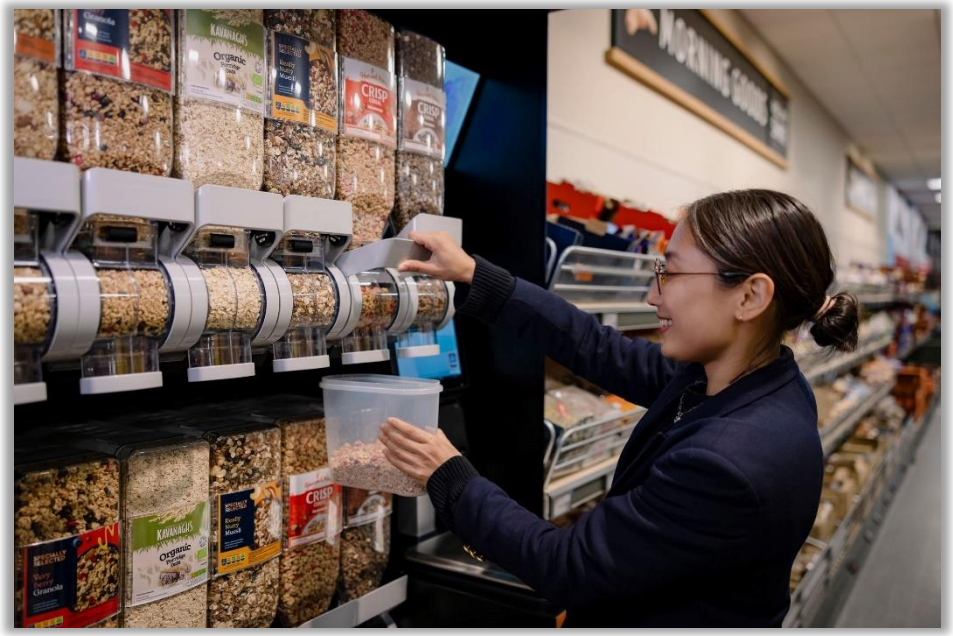
[20] Ready to Prefill report - City to Sea

Member action

After three years of trials, **Abel & Cole** has introduced sustainable refillable milk bottles made from 100% PP. The plastic bottle will cut the carbon footprint of single-use milk bottles in half after just four returns compared to heavier glass bottles, which would take over 15 returns to reach similar emissions savings. The bottles are extensively cleaned and sterilised in an eight-step process using specialist equipment, ensuring that they can be safely refilled and reused.

evian, together with the All-England Tennis Club in Wimbledon, announced the first on-court refillable system for players during The Championships 2023. The evian refill water system for Wimbledon saw players provided with their own reusable bottles that were refilled with evian natural mineral water, on-court and at designated player areas, including practice courts and dressing rooms.

The UK Refill Coalition, which was convened by GoUnpackaged in 2020 and includes Aldi UK, Ocado Retail and supply chain solutions company CHEP, has launched its first in-store trial at Aldi. The trial features a reusable bulk vessel to deliver refills, and prefills, at scale for key food staples such as cereals and pasta, and household products including cleaning and personal care products. The Coalition's vessel will facilitate three key new solutions: an in-store refill system for dry goods which has launched with Aldi UK; a tareless weighing system and liquids dispenser which is in development for launch 2024; and a bulk pre-fill solution which will also be launched by Ocado Retail in 2024.



TARGET 3

55%

OF PLASTIC PACKAGING IS EFFECTIVELY RECYCLED OR COMPOSTED

THE UK PLASTICS PACT

Progress towards **TARGET 3**

54%
PLASTIC RECYCLED IN THE UK

61%
INCREASE IN MATERIAL RECYCLED IN THE UK SINCE 2018

Progress towards Target 3: increasing recycling rates

70% of plastic packaging to be effectively recycled or composted

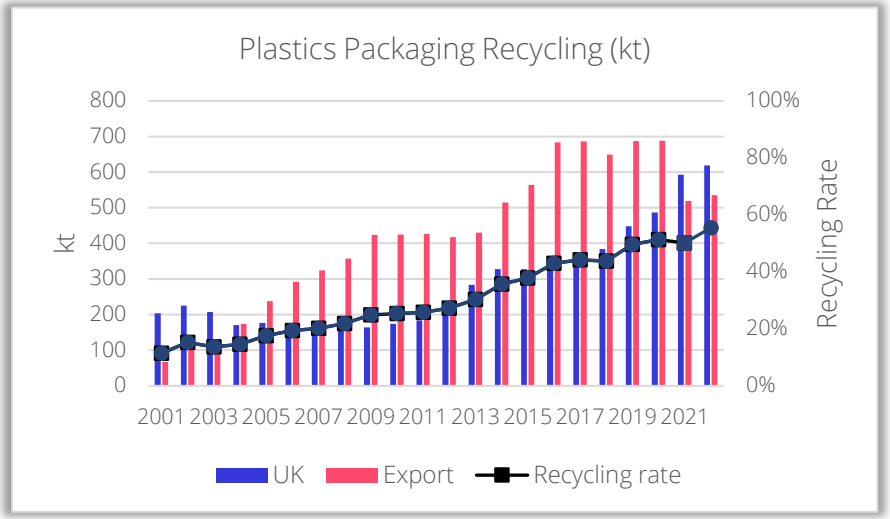
55% recycled[21]

54% plastic recycled in the UK

61% increase in material recycled in the UK since 2018[22]

The recycling rate for plastic packaging is calculated nationally based on how much is reported to be recycled or exported, relative to the amount of plastic packaging placed on the market in the UK. It is provided as an estimate as the figures on what is being placed on the market are under review and due to be published by Defra in May 2024. Provisional data indicates that 55% of plastic packaging was effectively recycled in 2022, compared to 44% in 2018. The increase has largely been driven by the reduction of plastic packaging placed on the market, which fell by 12%[23] between 2017 and 2022, coupled with an increase in the amount of plastic recycled.

The UK has seen steady growth in new capacity for reprocessing plastic packaging, and now recycles more domestically than it exports. Whilst incremental growth in new capacity continues, this falls short of the total required to achieve UK Plastic Pact targets. Ongoing delays in the implementation of policy reforms, and the Plastics Tax not addressing all market failures, have left many companies and potential investors reluctant to commit to large-scale investments.



[21] Provisional estimate, based on the latest data for packaging placed on the UK Market for 2022 and the 2022 National Packaging Waste Database for recycling and export.
[22] National Packaging Waste Database (environment-agency.gov.uk)

[23] 2017 data for plastics packaging: https://wrap.org.uk/sites/default/files/2020-11/WRAP-PlasticFlow%202025%20Plastic%20Packaging%20Flow%20Data%20Report_0.pdf

What next?

Plastic bags and wrapping continues to be a key focus area for the Pact, as it represents nearly 25% of all primary packaging reported by members, and this is the key plastic that is impeding our ability to hit the Pact's targets.

WRAP is looking in detail at what will be needed to recycle film at scale once kerbside collections are rolled-out, and the implications for brands and manufacturers with regard to design, future infrastructure requirements and the evolution of policies.

Member action

Mura Technology is preparing to open its doors to a commercial-scale HydroPRS™ 'advanced' plastic recycling site in Teesside, UK. The hydrothermal recycling plant, which uses supercritical water as the reaction medium, will complement mechanical technologies by processing currently 'unrecyclable' waste plastics, such as films and flexibles, into hydrocarbon products for new plastics. The development of the HydroPRS™ technology has been supported by Innovate UK, as a second-generation advanced recycling process, and was shown by the EU's Joint Research Centre to be operating at 50% lower carbon intensity compared to equivalent pyrolysis technologies, and 60% less than incineration. The new site at Wilton International will produce 20,000 tonnes annually of recycled products which will be available to offtake partners in 2024, with plans to increase to over three times this initial size.

Berry Global has opened a new facility in Leamington Spa to process its closed-loop CleanStream® polypropylene (PP) recycling technology, with an FDA Letter of No Objection in food grade applications in the US and application in process for the UK. Using a proprietary process, this new facility will wash, sort and sift PP to produce food-grade recycled plastic with a target purity standard of 99.9%, mechanically processing post-consumer polypropylene back into consumer packaging.

This could pave the way for the future of PP packaging recycling using automated sorting processes, online sensor technologies and machine learning algorithms to separate food grade PP containers, tubs and trays with high accuracy.

Biffa commissioned around 20,000 tonnes of additional capacity for high-density polyethylene (HDPE) reprocessing at its site in Redcar. Biffa also continued to develop its PET reprocessing activity in Seaham, achieving European Food Safety Authority (EFSA) approval: this has enabled the company to secure a multi-million-pound deal with Esterform Packaging, a major producer of plastic bottles, ensuring that more recycled PET makes its way back into PET bottles.

Polytag and Co-op have worked together to deliver a project in Wales that involves two types of codes being applied to labels, to provide better insight into the traceability of packaging materials all the way from the consumer to the recycler.

Both tags – a visible QR code, unique to each label, and an invisible UV data matrix – were applied to Co-op's two-litre spring water bottles, to give the retailer greater awareness of how their packaging is handled and disposed-of by consumers and the Local Authority in Abergele, Wales. The traceability trial saw hundreds of plastic bottles being recycled at Abergele within just a few weeks.

Along with front of store collections for plastic bags and wrapping, Aldi has joined Podback, providing customers with the opportunity to recycle their coffee pods through the post back scheme, and recently launched a medicinal blister packaging post back trial with TerraCycle. Just over 2,000 pod bags have been returned to date, and 1,750 blister pack envelopes.

FPF FlexCollect is a £2.9m project looking at:

- how plastic bags and wrapping are best collected at the kerbside;
- what participation and collection rates are likely to be;
- the operational implications of collecting the material; and
- the associated costs to help inform government and the EPR scheme administrator.

Collections started in October 2022 and are running until 2025, with the first set of interim data expected at the end of 2023. The project is delivered by partners Ecosurety, RECOUP, Suez and WRAP, and is funded by the UK government and the Flexible Plastic Fund.

Supercharging recycling

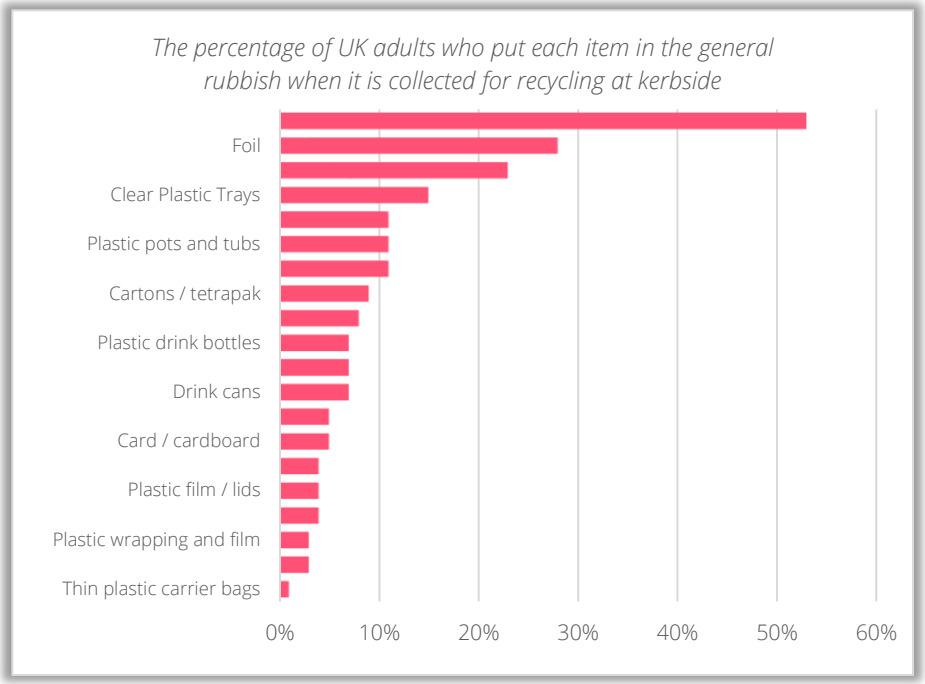
While household collection of plastic bags and wrapping is currently very low, there are widespread collection facilities in place for plastic bottles and plastic pots, tubs and trays. Despite this high level of access, missed capture remains an issue.

Percentage of local authority plastic packaging collection schemes

Country	At least one type of film	Bottles	PTTs
England	17%	100%	81%
Wales	23%	100%	100%
Scotland	6%	100%	84%
Northern Ireland	0%	100%	100%
UK	**16%**	**100%**	**83%**

Although plastic drinks bottles are collected by 100% of local authorities, 7% of adults throw them in the general waste bin. Similarly over 11% of people throw away pots, tubs, clear plastic trays and cleaning and toiletry bottles when they have access to household recycling services.

That's why clear and consistent communications are critical to increase recycling rates for this high-quality and valuable material, along with targeted messaging. Recycle Now cuts through the confusion, and with the number of searches on the Recycling Locator increasing to over 5 million between August 2022 and July 2023, people are seeking-out information so that they can do the right thing.



Recycle Week reaches its 20th year

Recycle Week 2022 celebrated huge success as it got the nation to get real about recycling, boldly targeting myths and misconceptions while dealing with contamination, to improve recycling behaviours – tackling those pesky non-recyclables that end up in the recycling bin.

With celebrity ambassadors Mark Foster and Matt Pritchard, and a wide range of influencers, Recycle Week 2022 focused on driving impact, real action and behaviour change. Animated social ads and Out of Home advertising answered the tough questions, along with a direct call to action to visit the Recycling Locator for help in getting recycling right.

Recycle Week has proved that people are hungry for the right information, with 323,000 Recycling Locator searches during the Week, an 88% increase on the week prior. 7.1 million people recalled reading or hearing about the Week, and 3.7 million people did something differently as a result.

Celebrating its 20th year in October 2023, Recycle Week continued to build on the success of the brand by focusing on missed capture in England and Northern Ireland – Items that we can recycle but are commonly missed. The Big Recycling Hunt got households and schools all over the country finding recyclable items that are commonly missed in the home, such as plastic cleaning and toiletry bottles and pots, tubs and trays. In Wales food waste was the focus, with another burst of the Be Mighty. Recycle campaign. Food is where we can make the mightiest impact in Wales, so the campaign aimed to inspire people to waste less and recycle more.

Meanwhile the first ever Recycling Summit saw over 200 delegates hearing from a range of expert speakers including Recycle Week sponsors Arla, Boots, Britvic, Coca-Cola, Danone and Tesco.

TARGET 4

24.1%

AVERAGE RECYCLED CONTENT (UP FROM 8.5% IN 2018)

THE UK PLASTICS PACT

Progress towards TARGET 4

10.5%

REDUCTION IN CARBON, TAKING 290,000 TONNES CO_2e OUT OF THE ATMOSPHERE

Progress towards Target 4: driving demand for recycled content

30% average recycled content across all plastic packaging

24.1% average recycled content (up from 8.5% in 2018)

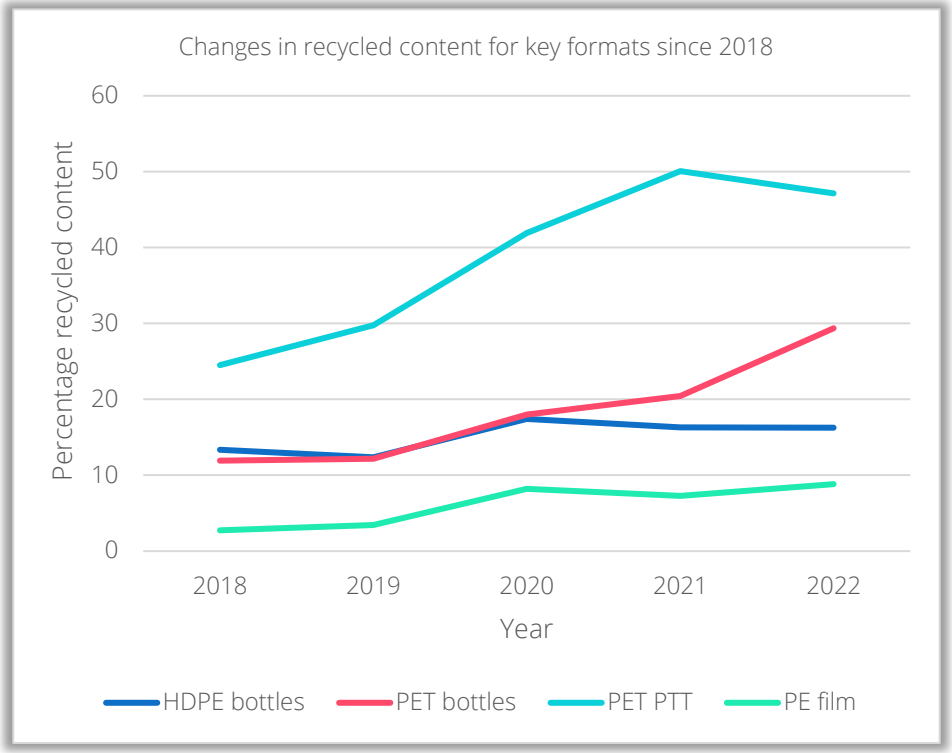
10.5% reduction in carbon, taking 290,000 tonnes CO_2e out of the atmosphere.

Members reported an average rate of recycled content across all plastic packaging of 24.1%, compared to 8.5% in 2018. Recycled content in primary packaging (only) is slightly higher, at 25.8%.

There have been increases in recycled content across the majority of polymers, with PET increasing by 32%, PE by 9% and PP by 4%. PET still accounts for over 75% of the recycled content that is placed on the market.

Between 2021 and 2022, recycled content of primary packaging continued to increase across key formats. HDPE bottles increased by 6%, PET bottles by 44%, and PET pots, tubs and trays by just over 14%. Meanwhile recycled content of PE film declined by 17%.

It is likely that the rate of progress will begin to slow, with the low-hanging fruit opportunities mostly being realised. Key challenges are material costs and availability, regulation, and aesthetic and performance challenges.



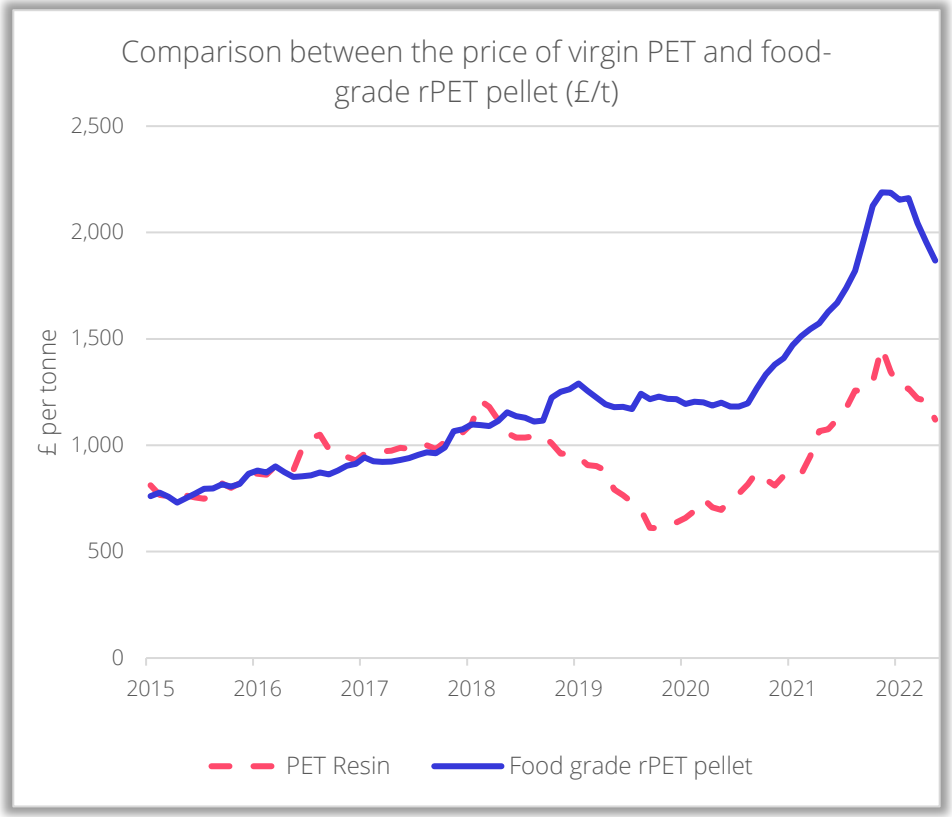
Industry bodies continue to work to overcome the challenges that remain in increasing recycled content:

- Through Berry BPI, the UK has its first mechanically recycled PP plant with US Food and Drug Administration (FDA) approval, with EFSA approval pending. This will help unlock food-grade and skin-contact recycled content.
- Partnering with UK Research and Innovation (UKRI), WRAP is working to develop a test to prove the safety and decontamination of polyolefins for direct food contact, so that regulators and the industry have a standardised approach when seeking food contact approval.
- Work is continuing to remove colour from milk bottle caps, to enable them to be recycled back into food packaging.

What next?

The outcome of the consultation for revisions to the Plastics Packaging Tax to enable mass-balance accounting in non-mechanical recycling, is key to unlocking the supply of food-grade recyclate and demand for recovered plastic bags and wrappers.

WRAP will work with the industry to identify the key opportunities and levers to ensure a sustained increased in recycled content, particularly in light of prices for virgin plastic being lower than the recycled equivalent. This will include a review of how policy mechanisms could be recalibrated to support strong and stable end-markets for recyclate and avoid fraud, and collaboration with industry on innovations which will unlock food-grade and skin-contact materials.



WRAP is also developing key principles for recycled content hierarchy, to keep material in circulation as long as possible. Businesses are encouraged to design plastic packaging in line with WRAP's Polymer Choices Design Guidance, which reflects these principles.

Member actions

In 2021 Kingsmill launched a pilot which incorporated 30% post-consumer recycled content in Kingsmill No Crusts 50/50 bread bags. The aim was to help demonstrate how a circular economy could work for plastic bags through advanced (non-mechanically) recycled plastic. The trial has since been extended and recycled content introduced into a second bag, Kingsmill No Crusts Tasty Wholemeal. The equivalent of over 2 million virgin plastic bags has been removed from Kingsmill's supply chain since August 2021.

Nomad Foods has reduced the use of virgin plastic material in its Lowestoft factory by including 30% recycled content in the shrink wrap used to bundle primary packs of product, equating to 63 tonnes of additional recycled content used annually across the business.

Morrisons has embedded The UK Plastics Pact Roadmap Targets for recycled content in its packaging policy, ensuring that the business will go beyond the Plastics Packaging Tax requirements for key formats where higher levels are achievable.

Mondelēz has included trays made with ~80% rPET in its core range of Cadbury selection boxes. This move has enabled them to remove around 400 metric tonnes of virgin plastic as part of their 2025 sustainable packaging goals and progress towards The UK Plastic Pact targets.

Faerch, in collaboration with **Tesco**, has launched an initiative which will mean PET pots, tubs and trays collected from kerbside will be recycled and converted back into food grade plastic trays - creating a fully circular packaging solution for the Tesco range of core chilled ready meals. The ready meal trays already contain up to 75% recycled content, predominantly from cleaner and easier to recycle bottle flake plastic. Through the new initiative, a minimum of 30% recycled tray content will be included in the new packaging. The collaboration will ensure that high quality food-grade PET is kept within the supply chain, rather than being downcycled, and demonstrates that PET packaging from trays can be fully recovered and recycled at an industrial scale.

Urgent action is still required

Policy is required, particularly to support the further elimination of unnecessary packaging including from uncut fresh produce, and ensure the collection and recycling of plastic bags and wrapping. This will support businesses to achieve the targets of The UK Plastics Pact.

But the planet can't wait.

WRAP is calling for urgent action from all businesses to join Pact members in:

1. Removing unnecessary plastic, including the removal of packaging from uncut fresh produce, for 30% of sales of fresh produce to be loose by 2025. Find out more.
2. Further simplifying plastic packaging design – moving to mono-materials across all pack formats and away from polystyrene (PS) and polyvinyl chloride (PVC) by 2025. Find out more.
3. Moving from pilots to scaled reuse/ refill systems and joining WRAP's collaborative action group to facilitate this. Contact WRAP.
4. Engaging with citizens to recycle as much as they can. Contact WRAP to find out how best to achieve this.
5. Including/ increasing recycled content by reviewing all plastic packaging to consider opportunities, particularly bags/ wrapping and coloured plastics. Find out about the polymer/format targets.
6. Supporting the case for investment in critical infrastructure by setting up longer-term contracts for recyclate.

Beyond 2025: what happens next?

WRAP has initiated work to consider the successor agreement to The UK Plastics Pact, working closely with The Ellen MacArthur Foundation and the other Plastics Pacts to ensure a continued level of alignment of initiatives.

It is clear that there is the need to deliver on the original objectives of The UK Plastics Pact, once the supporting regulatory framework is in place, and continue to embed a circular economy for plastic packaging. It is important that any future agreement also clearly links with net-zero objectives and supports industry in reducing the environmental impact of all packaging.

The shifting policy landscape, nationally and globally, including the influence of the UN treaty to end plastic pollution, will also contribute to the trajectory of The UK Plastics Pact and the wider Pact Network.

With the invaluable input of our members and other stakeholders throughout 2023, we will develop a successor agreement that helps members to meet their obligations and go further, to support a global transition to a truly circular economy for plastics and packaging.

Join us...

By joining the Pact, your business can actively play a role in tackling the climate impact of plastic pollution. Members gain support and knowledge to help meet customer requirements, are on the front foot for policy implementation such as EPR, and have their voice represented in the UK negotiations for the Global Plastics Treaty.

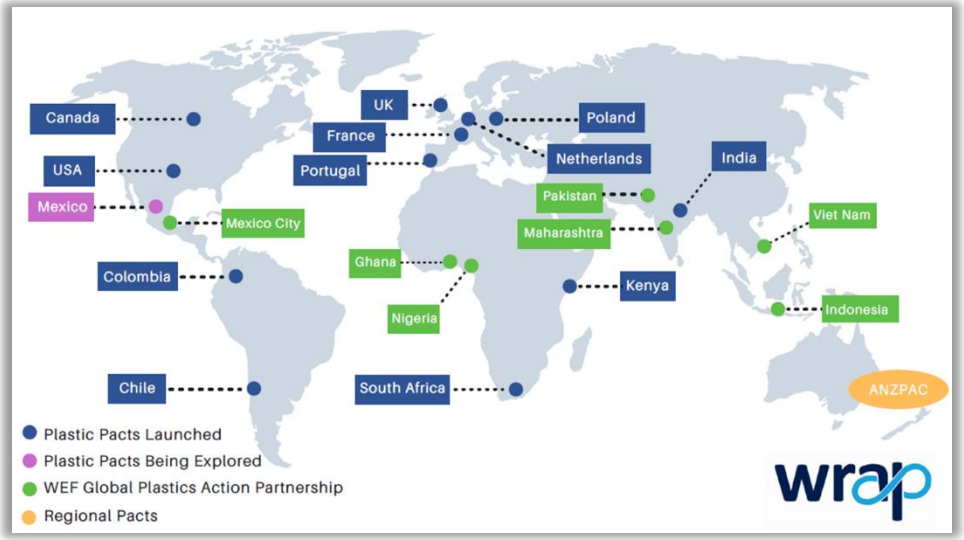
Join The UK Plastics Pact to be at the forefront of tackling not only the plastics challenge but the climate emergency. Spearhead fundamental change in the way we design, produce, use, reuse, recover and reprocess plastics.

The time to act, to tackle plastic pollution, is now.

Discover more and become a member

The global landscape

Tackling plastic pollution requires combined global and national action. Global initiatives can unlock investment, establish clear definitions, and galvanise major international organisations and businesses. However, it is at the national scale (such as through The UK Plastics Pact) that action needs to happen – to fully engage national retailers and brands, local authorities, national policy makers, the waste management sector and consumers. This is why WRAP, having established The UK Plastics Pact in 2018, has led in establishing Plastics Pacts in South Africa, Kenya, Colombia, India and Mexico, and has been supportive of similar Pacts elsewhere.



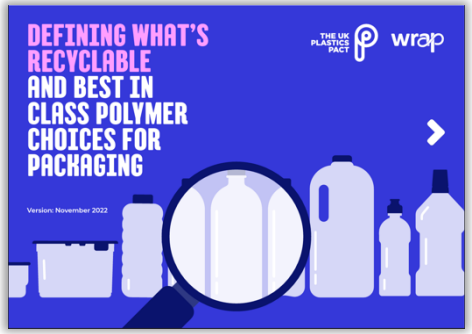
Each Plastics Pact is led and managed by a national organisation and coordinated through our international plastics programme. Working in partnership with The Ellen MacArthur Foundation, WRAP is providing operational and technical support to all 13 other Plastics Pacts globally, with the aim of delivering greater impact.

Key highlights between 2022 and 2023

- WRAP worked alongside Cempre to launch the Colombia Plastics Pact
- Working with the Confederation of Indian Industry, WRAP supported the India Plastics Pact in publishing groundbreaking reports and guidance to support action, including design guidance, recycling landscape surveys, and guidance on small-format packaging and including recycled plastic content. (Resources - India Plastics Pact)
- Building on the well-established track record of citizen engagement in the UK, WRAP supported the first ever national Recycle Week in Chile, to target plastics recycling
- WRAP supported Kenya in the publication of PET design guidance
- WRAP supported a Global Expert Mission (GEM) to India for UK plastics innovators with a particular focus on chemical and dissolution recycling
- WRAP set up the '3C network' which provides a platform for knowledge exchange across all the Pacts and Global Plastic Action Partnership initiatives on key circular plastics topics.

There is significant potential in using the Global Plastics Pact Network to accelerate progress and share learning and insights, helping members of all the Pacts to reach their targets. WRAP will continue to support the Pacts to deepen impact, accelerate knowledge and collaboration, and engage on the Global Treaty to ensure that it is ambitious, while accelerating investment and action.

A rich library of insights and guidance



WRAP is a climate action NGO working around the globe to tackle the causes of the climate crisis and give the planet a sustainable future. Our vision is a thriving world in which climate change is no longer a problem. We believe that our natural resources should not be wasted and that everything we use should be re-used and recycled. We bring together and work with governments, businesses and individuals to ensure that the world's natural resources are used more sustainably. Our core purpose is to help tackle climate change and protect our planet by changing the way things are produced, consumed and disposed of.

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