

UNWRAPPING THE POTENTIAL

FoodDrinkEurope's SUSTAINABLE PACKAGING ROADMAP



Enjoy food, today and tomorrow

About

FoodDrinkEurope is the Brussels-based organisation of Europe's food and drink industry. Its mission is to facilitate the development of an environment in which all European food and drink companies, whatever their size, can meet the needs of consumers and society, while competing effectively for sustainable growth.



QR Codes

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Microsite

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The Challenge

Food and drink packaging plays a vital role in protecting and preserving products for consumers. It allows food and drink manufacturers to offer consumers a wide choice of safe products that meet their lifestyle needs.

However, some packaging – particularly plastics – ends up in nature and contributes to the growing problem of (marine) litter. In addition, different packaging materials face different challenges in terms of circularity. Some materials, including some plastics, are already fully recyclable and the challenge is to ensure infrastructure is in place to collect, sort and recycle it, and that consumers dispose of the waste responsibly. For other materials, there is a need for innovation in recycling technology and sometimes redesign. There is an urgent need to ensure that all packaging is sustainable and reusable, recyclable or compostable to support a societal transition towards a circular economy.

As a major user of packaging, the food and drink industry fully acknowledges that it has a share of the responsibility with regards to the impact of the packaging that it puts on the EU market. With this Roadmap, Europe's food and drink industry seeks to continue to improve the circularity of packaging for food and drink products to drive future innovation.



Why do we need packaging?



Maintains food safety and optimal quality

Packaging extends the shelf-life of products by preventing spoilage.



Helps to reduce food waste

Packaging acts as a protective barrier, reducing exposure to the elements (e.g. oxygen, light and moisture), which reduces spoilage and keeps foods and drinks safe for longer, giving consumers more time to enjoy their food.



Preserves freshness and extends shelf-life

“Active” packaging absorbs moisture and other gases, thereby increasing shelf life. Re-sealable packs continue to keep food fresher for longer after opening.



Provides a variety of portion sizes

The food and drink industry is committed to providing its products in a wide variety of portion sizes, in order to fit the intended occasions. Individually portioned packs are important to help consumers control their calorie intake, thus encouraging them to eat a healthy, balanced diet.



Provides information to consumers

FoodDrinkEurope and its members are committed to rolling out the voluntary nutrition labelling scheme, Reference Intakes (referenceintakes.eu), also known as GDAs, to help empower consumers to make informed choices. In addition, packaging provides a means to communicate mandatory information about food to consumers.

Progress to date

Over the last decades, much progress has been made in reducing the amount of packaging used in the first place, boosting recycling rates, making packaging more recyclable and reducing packaging waste.

The amount of packaging put on the market is not growing as rapidly as consumption, suggesting a degree of decoupling. From 2006 to 2015, total household consumption grew 10%*, while packaging increased only 1.8%** during the same period.

Household consumption

10%

Packaging

1.8%

2006

2015



The EU recycling rate has increased from 47% in 1998 to 65% in 2015.

*



**



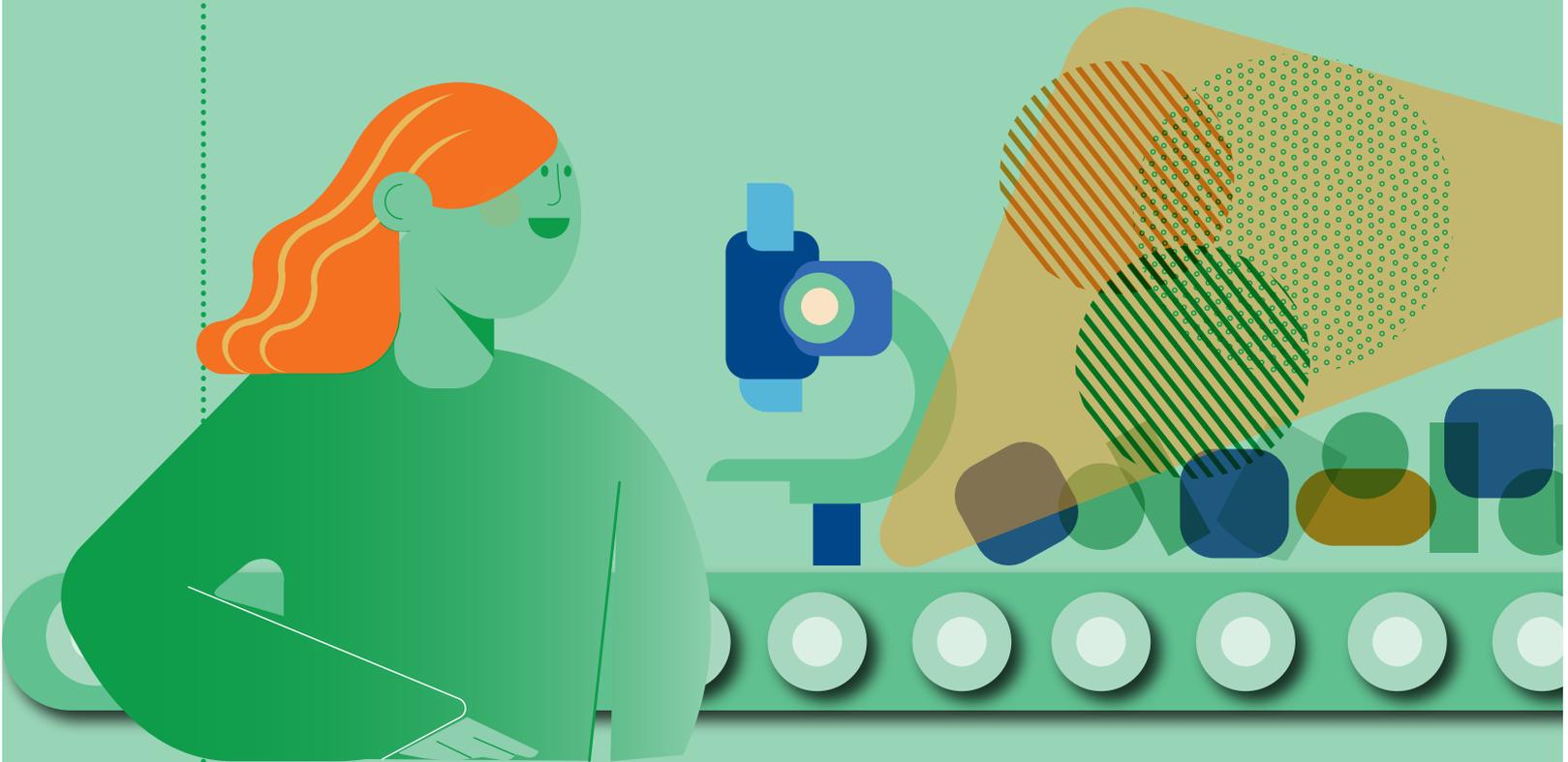
Food and drink manufacturers have played an active role in setting up packaging recovery organisations in almost all Member States to ensure the recovery and recycling of packaging waste in the most economically efficient and ecologically sound manner.





Improve packaging design

In order to continue to offer consumers a broad choice of products, food and drink manufacturers use different kinds of packaging to best match the conservation needs of the product and consumers' lifestyles. Therefore, food and drink manufacturers' sustainable packaging design strategies are multi-pronged and fit-for-purpose.



1.

Improve design for recyclability

Food and drink manufacturers will ensure better packaging design can be delivered in the near future to accelerate the transition towards a circular economy model. This needs to be matched by actions taken by national and local authorities to ensure a consistent offering to consumers in terms of materials collected for recycling from households and the necessary and efficient sorting and recycling facilities.

While some plastic packaging, such as PET, can be recycled economically and environmentally effectively in Europe, the recyclability of other plastic packaging remains an industry-wide challenge. For a wide variety of products, multi-layer packaging and lightweight plastic packaging allow food and drink manufacturers to reduce the amount of packaging used by weight, thereby using less fuel to transport and reducing GHG emissions.

The challenge for multi-layer materials are that they are made of multiple materials that are difficult to separate and can contain functional additives that make recycling more difficult. They also have a low market value as a secondary raw material, therefore there is a lack of investment in facilities to

recycle these materials due to a low return on investment.

Lightweight materials (mono- or multi-layer) also face similar challenges since they are lightweight and therefore difficult or not perceived as valuable to collect and recycle. This means that even when these kinds of packaging are designed to be recyclable, the necessary infrastructure to process them into secondary raw materials is often lacking*.



THE TRAJECTORY

100% reusable, recyclable or compostable plastic packaging by 2025

FOLLOW THEIR LEAD



Ellen MacArthur Foundation's New Plastics Economy Initiative

As part of the Ellen MacArthur Foundation's New Plastics Economy Initiative, food and drink brands, including Mars, Evian, PepsiCo, Coca-Cola, Unilever, and Nestlé have committed to work towards 100% reusable, recyclable or compostable packaging by 2025 or earlier.



WHAT WE HAVE ACHIEVED SO FAR

Unilever: Piloted recycling solution for multi-layer sachets

Unilever is publishing the full "palette" of plastics materials used in its packaging by 2020 to help create a plastics protocol for the industry. The company is also helping tackle the industry-wide sachet waste issue by investing in proving, and then sharing with industry, a technical solution to recycle multi-layered sachets – CreaSolv.

*



2. Increase the use of recycled materials

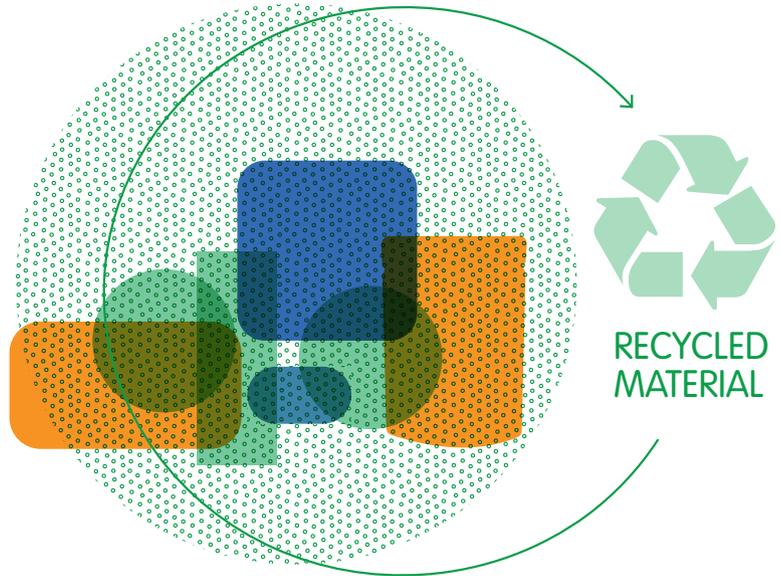
Recycled content refers to the portion derived from used packaging rather than virgin material. Increasing the uptake of recycled materials in new products ** could drive materials recycling and boost innovation. For food and drink manufacturers, food safety is their highest priority. All packaging materials need to be fully assessed for their suitability to come into contact with any given foodstuff regardless of whether virgin or recycled, and this is reflected in EU legislation. Packaging materials that are in contact with food and drinks have to meet very strict requirements (Commission Regulation (EC) No 1935/2004) ***.

While using recycled content in paper, glass and metal food and drink packaging is common, using recycled plastic remains a challenge. There are few plastic polymers, (mainly PET) that can meet the necessary quality and food safety requirements with today's existing recycling technology and infrastructure, but these plastics are not applicable for all food and drink packaging needs.

We encourage the European Commission and EFSA to swiftly assess whether other recycled plastic materials can be safely used in contact with food, for instance, through better characterisation of contaminants.

**





Food and drink manufactures will continue to promote a market for secondary raw materials by integrating recycled content into their primary and/or secondary packaging on a case-by-case basis, ensuring that food safety requirements and EU rules on food contact materials are respected. It is also important that markets for using recycled material in non-food contact applications are further developed under the European Strategy for Plastics in a Circular Economy.





THE TRAJECTORY



Evian: 100% recycled plastic by 2025

By 2025, Evian will make all of its bottles from 100% recycled plastic. This important pledge will be made possible thanks to an agreement with Loop Industries, which discovered a unique catalyst that breaks down PET plastic with zero heat and zero pressure.

The resulting monomers can then be re-polymerised into a new moldable plastic resin. All the additives and impurities in the waste plastic can simply be filtered out.



25% recycled PET in soft drinks and water bottles by 2025

The European Federation of Bottled Waters pledged in 2018 to be a driving force to collect 90% of all PET bottles by 2025 as an EU average. Bottled water producers will also collaborate with the recycling industry to use at least 25% recycled PET in its water bottles by 2025 as an EU average.

Soft Drinks Europe (UNESDA) adopted in 2018 a set of EU-wide ambitions to make the sector's plastic packaging more sustainable:

- By 2025 soft drinks PET bottles will contain a minimum 25% recycled material on average
- By 2025 100% of soft drinks primary plastic packaging will be recyclable



3.

Explore the use of alternative materials

Food and drink manufacturers will continue to explore the use of alternative materials with improved environmental performance.



danimer
scientific
A Biotechnology Company



PEPSICO



THE TRAJECTORY



Photo credit: Coca-Cola.

Coca-Cola: PlantBottle avoided 430,000 metric tones of CO₂

In 2009, Coca-Cola introduced the world to PlantBottle™ packaging, which is PET plastic made from up to 30% plant-based materials, is fully recyclable, and meets

the quality requirements of our core beverages. To date, Coca-Cola has distributed over 45 billion PlantBottle packages in 44 markets across 35 brands. Use of PlantBottle packaging has saved more than 48 million gallons of gas (petroleum is used to produce virgin PET), and also eliminated more than 430,000 metric tons of potential carbon dioxide emissions. That's the equivalent of taking more than 90,000 cars off the road. On a global level, the Coca-Cola Company has put forward its ambition to use 50% recycled or renewable materials by 2030.



WHAT WE HAVE ACHIEVED SO FAR

PepsiCo: next generation snacks packaging

Flexible films are critical for PepsiCo's snacks packaging, yet across the industry these films are not yet recyclable or compostable. To address this challenge, PepsiCo has entered into a collaboration with Danimer Scientific to develop biodegradable film resins made from renewable biomass to be used for next-generation snacks packaging.



Actively support collection, sorting and recycling

The food and drink industry will continue to play an active role in supporting the development of well-functioning collection, sorting and recycling systems across Europe. The industry is also working with value chain partners and local authorities to develop new approaches to facilitate recycling.

For instance, Projet Plastique from CITEO in France aims at increasing the collection of all plastics and the restructuring and modernisation of sorting facilities. While all plastics are already collected in many countries (e.g. Austria, Germany, Spain), in Belgium, the organisation Fost Plus will collect all plastic packaging from 2019 and will recycle it in Europe. Increased investment in recycling infrastructure and sorting facilities, research and innovation of suitable recycling techniques, such as chemical recycling, should be put in place.



WHAT WE HAVE ACHIEVED SO FAR



Swedish industry invests in plastic packaging sorting plant

In Sweden, a new sorting plant for plastic packaging is being built by a company that is jointly owned by fillers, importers, trade and packaging manufacturers. The new plant, which will be fully operational in Q1 2019, will meet more than the entire national demand for sorting and recycling plastic packaging from both households and businesses, minimising expensive logistics and long journeys. It is expected to sharply increase plastic packaging recycling beyond the Swedish government's 2020 recycling targets.

Another initiative in Sweden was the 2015 extension of the deposit fees system for bottles and cans, which is operated jointly by brewers and retailers. Producers of syrup and juices can now participate in the system on a voluntary basis, which will contribute to higher rates of recycling of plastic bottles.



Mars promotes coffee cups recycling

Mars actively promotes Terracycle for its Freshpacks recycling in the UK and Simply Cups for recycling plastic and paper cups. Mars Drinks has teamed up with innovator TerraCycle to provide a second life to used FLAVIA® Freshpacks, KLIX® Cups and ancillaries across the UK.

TerraCycle is a highly-awarded, international upcycling and recycling company that collects difficult-to-recycle packaging and products and repurposes the material into affordable, innovative products. Simply Cups is the UK's only collection and recycling service dedicated to turning paper and plastic cups into second-life materials.



Continue raising awareness

Food and drink manufacturers will continue to contribute towards communication campaigns and action plans to prevent litter, such as An Taisce in Ireland, Gestes Propres in France and Mooimakers/BeWapp in Belgium. FoodDrinkEurope will continue to advocate for education and awareness-raising campaigns as a crucial part of a long-term joint effort to stop litter from arising in the first place, along with collection, improving waste management infrastructure and developing a range of end-of-life solutions.



WHAT WE HAVE ACHIEVED SO FAR



Belgium: Action plan to fight litter

In Belgium, the packaging industry made an agreement with the authorities to cooperate in fighting litter. An action plan is being executed in cooperation with the authorities by Mooimakers and BeWapp.

This action plan is based on five pillars: awareness-raising, infrastructure, environment, participation and enforcement. Every year, the packaging industry invests EUR 17 million to put the action plan into practice via the national EPR system for household packaging waste.



Nestlé: Raising consumers' awareness

Nestlé Waters has contributed to raising consumers' awareness through various brand platforms and corporate educational programs such as R-Generation, implemented in Italy, Argentina, United Kingdom and Thailand. Nestlé aims to further leverage the strength of its brands to engage with consumers on recycling behaviours through raising awareness and clearly informing consumers about the right way to dispose and recycle product packaging.

In the UK, the R-generation programme reached over 700 children and made materials freely available to councils and schools by working with RECOUP, a national NGO that promotes recycling.

FoodDrinkEurope Actions

FoodDrinkEurope will support food and drink manufacturers on their trajectory through the following actions.



1. Develop and promote a Sustainable Packaging Checklist by 2019.



2. Further improve and support uptake of the EU's Product Environmental Footprint methodology and a life-cycle approach on a voluntary basis working with the European Commission.



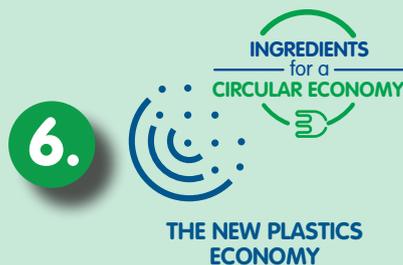
3. Explore how marine litter impacts can be accounted for in life-cycle assessment.



4. Cooperate with the European Commission and European Food Safety Authority to set a clear programme on the assessment of whether recycled plastic materials other than PET can be safely used in contact with food, for instance, through better characterisation of contaminants.



Work towards an EU-harmonised recycling label.



Work with the Ellen MacArthur Foundation's New Plastics Economy Initiative.



Set out clear options for the European Technology Platform 'Food for Life' to identify priority areas for sustainable food and drink packaging innovation.



Together with authorities, support the development and funding of educational programmes to promote recycling and responsible disposal.

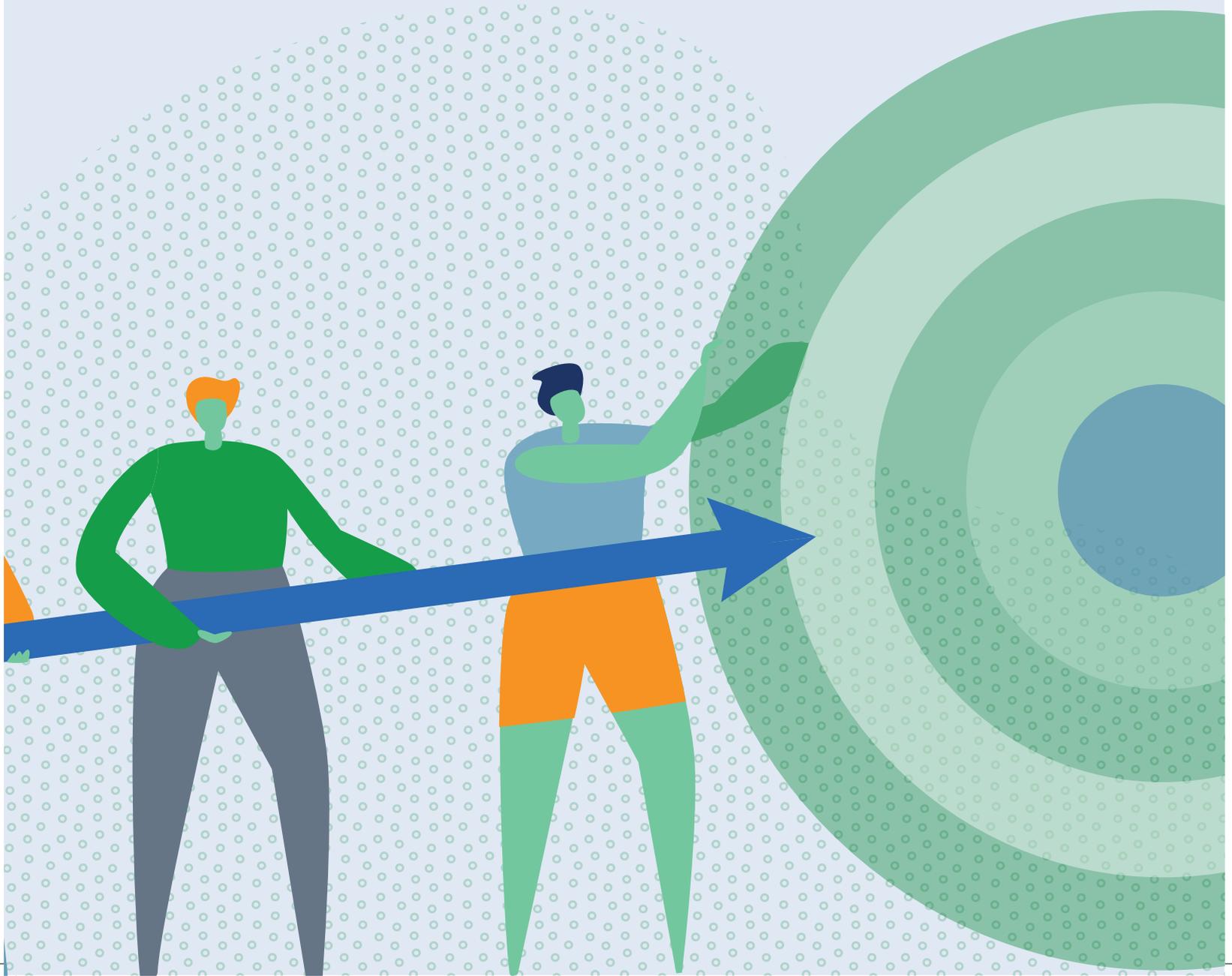
Policy Enablers: What do we need in order to get there?

Making food and drink packaging circular and sustainable is a societal challenge, and we cannot do it alone. We can design packaging that is technically recyclable, but waste collection, sorting and recycling infrastructure needs to be in place.

We can innovate and design packaging that reduces GHG emissions, material use and water use, but recycling technology also needs to urgently evolve to make more kinds of packaging recyclable, especially plastics. We can provide recycling information, but inappropriate disposal behaviour and inadequate sorting also needs to be addressed.

Food and drink manufacturers can contribute towards these shortcomings as part of the shared responsibility for waste management involving all actors, and we need our efforts to be matched by other involved actors.





FoodDrinkEurope calls on EU policymakers to:



1. Ensure full implementation and enforcement of the EU waste package. Increased sorting and collection should be achieved through better performance of Extended Producer Responsibility schemes and where feasible, according to local conditions and on a case-by-case basis, deposit-return schemes.



2. Encourage all Member States to enact laws against the improper disposal of waste whether this be by industry or citizens and encourage corresponding penalties.

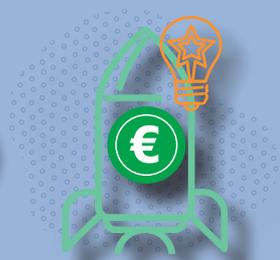


3. Develop regulatory frameworks that offer equivalent levels of food safety and quality for alternative materials to plastics.



4. Develop EU-harmonised criteria for the modulation of packaging fees and fiscal incentives.

5.



Accelerate the release of EU funding aimed at stimulating investment in waste management infrastructure and innovative recycling technologies, such as chemical recycling (Structural Funds, European Fund for Strategic Investments, Circular Economy Finance Support Platform and Horizon 2020).

6.



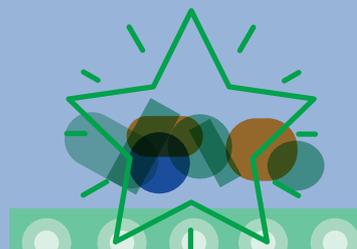
Encourage investment in new European end markets for recycle beyond food packaging.

7.



Address the need for availability and affordability of recycled PET, making sure material used for food and drink applications comes back to similar uses to ensure food safety.

8.

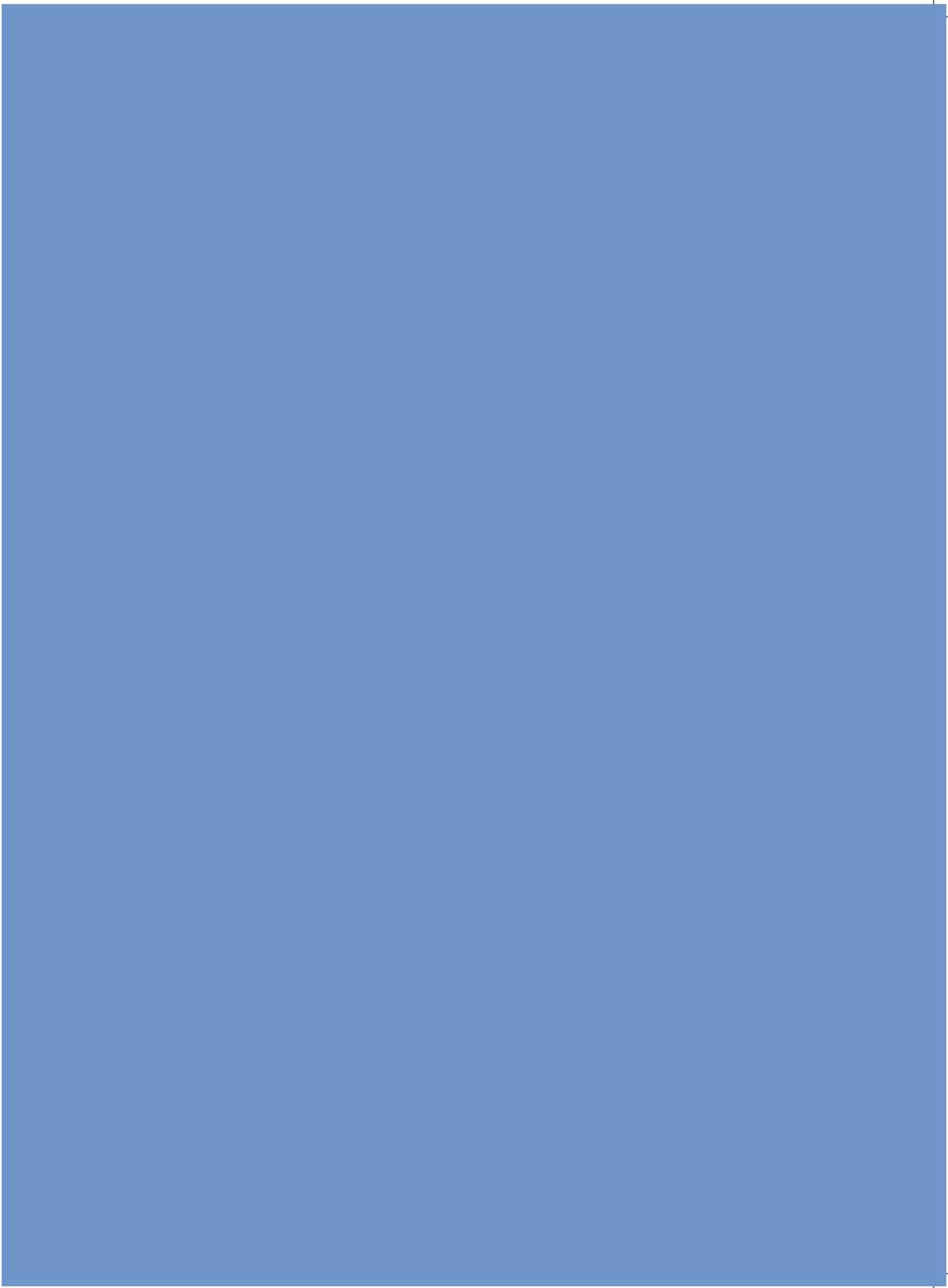
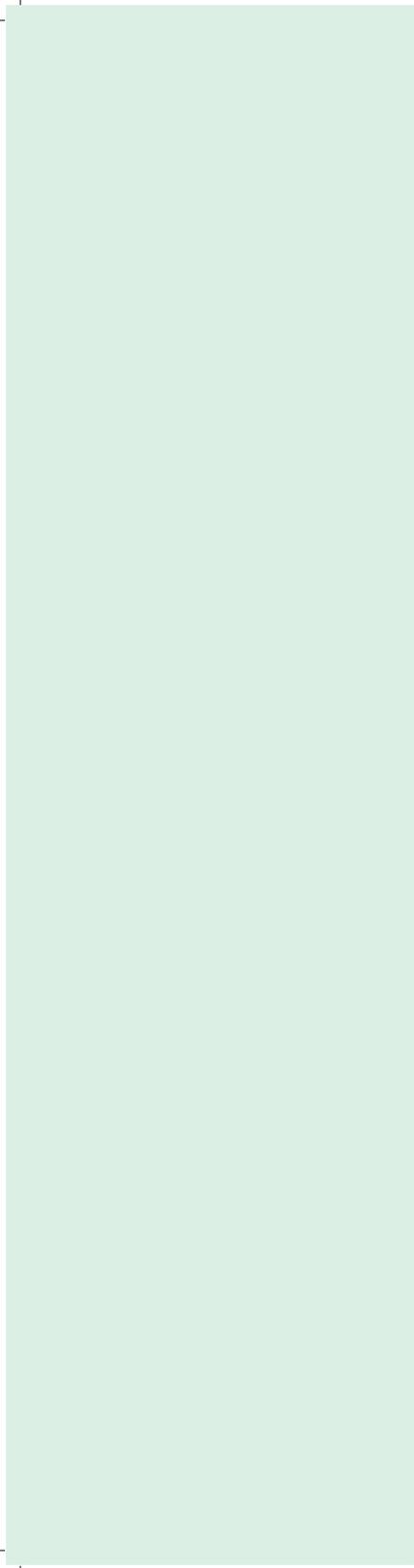


Secure financing for novel food and drink packaging materials that improve circularity, more efficient and innovative recycling processes and the removal of contaminants from recycled materials to allow them to be used as food contact materials under the EU's next research and innovation framework, Horizon Europe. Consumer acceptance of novel food and drink packaging materials should also be studied to ensure that they will be successful in the market.

9.



Increase awareness raising activities and encourage Member States to develop educational programmes to motivate consumers to dispose of used packaging responsibly.





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