

ABOUT THESE SECTOR INSIGHTS:

This document presents insights and data on the progress made by food signatories listed below to achieve their commitments on plastic packaging. This document is part of the 2021 Global Commitment Progress Report.

GLOBAL COMMITMENT SIGNATORIES REPORTING IN THIS SECTOR:

Clif Bar & Company

Danone S.A.

Driscoll's*

Ferrara*

Ferrero

FrieslandCampina Nederland
B.V.

Kellogg Company

Mars, Incorporated

McCain Foods*

McCormick & Company

Mondelez International

Nestlé

Sovena Group*

Zespri Group Limited

**These signatories did not provide data for one or more metrics for 2019 and so are excluded from year-on-year comparisons for the relevant metric(s). In most cases this is due to signatories only having joined in the last reporting cycle.*

Food sector

 [EXPLORE SIGNATORIES' ONLINE DATA](#)

 [READ THE GLOBAL COMMITMENT 2021 PROGRESS REPORT](#)

KEY INSIGHTS

The majority of food signatories saw a decline in their use of virgin plastic packaging over the last year, and this trajectory is set to continue thanks to new reduction targets.

In 2020, eight food signatories (80%) saw a reduction in their virgin plastic packaging, which decreased by 5% on average. This was partly driven by an overall decrease in plastic packaging weight for the sector as a result of COVID-19's disruption to signatories with water divisions or those serving the catering industry. Through reduction targets, all signatories have now committed to reduce their virgin plastic in packaging – by on average 21% – by 2025.

Less than half of the group made progress on increasing their use of post-consumer recycled content, with the food sector having the lowest proportion of recycled content of all sectors.

Four food signatories (40%) increased the proportion of post-consumer recycled content from the previous year, by an average of 4 percentage points. However, with an average post-consumer recycled content of just 2.6%, the food sector has the lowest of all sectors analysed, partly driven by challenges in sourcing recycled content of sufficient quality for food-contact packaging and relatively high use of packaging categories that are non-recyclable.

Food signatories reported limited action to avoid the use of packaging to begin with, particularly on consumer flexible packaging.

Signatories have the highest proportion of consumer-facing flexible packaging compared to other sectors (41% on average vs 26% for all brand and retail signatories), which is not recyclable including pouches and wrappers. However, no examples of this packaging being eliminated were reported by signatories. Also, ten signatories (91%) did not increase their overall proportion of reusable plastic packaging, which remained below 1% on average.





REDUCTION TARGETS

From 2021, signatories are required to set 2025 targets to reduce their total weight of plastic packaging or virgin plastic in packaging to remain in the Global Commitment.



ELIMINATION OF PROBLEMATIC OR UNNECESSARY PLASTIC PACKAGING



TRENDS:

- Signatories are most commonly targeting PS, PVC,¹ multilayer packaging, and undetectable carbon black to increase recyclability. All signatories with single-use straws and cutlery still in their portfolios are also planning to eliminate or reduce them.
- Only a few signatories reported actions to avoid single-use packaging to begin with, through fundamental changes to packaging, products, or business models, with no signatories reporting using these changes to eliminate consumer-facing flexible packaging (e.g. sachets, mono-layer films).

HIGHLIGHTS:

- As well as phasing out PS and PVC, **Danone** eliminated 170 million straws and 7 million spoons through direct elimination and substitution to paper.
- Applying the Consumer Goods Forum's Golden Design Rules, **McCain Foods** reported plans to eliminate all EPS, metallised films, multilayer materials, PETG in rigid packaging, and PS from its portfolio by 2025 – addressing 2,074 metric tonnes of packaging.
- Mondelez** removed plastic windows from 6.4 million chocolate egg boxes, eliminating 5.4 metric tonnes of plastic.

VIRGIN REDUCTION TARGET HIGHLIGHTS (i):

- Danone** and **Nestlé** are targeting a 33% reduction in virgin plastic in packaging from their 2019 and 2018 baselines, respectively.
- McCormick & Company** is targeting a 30% virgin plastic packaging reduction compared to its 2017 baseline.

TOTAL REDUCTION TARGET HIGHLIGHTS (ii):

- On top of reducing virgin plastic in packaging by 31% from a 2019 baseline, **Sovena** is targeting a total plastic packaging reduction of 400 metric tonnes.

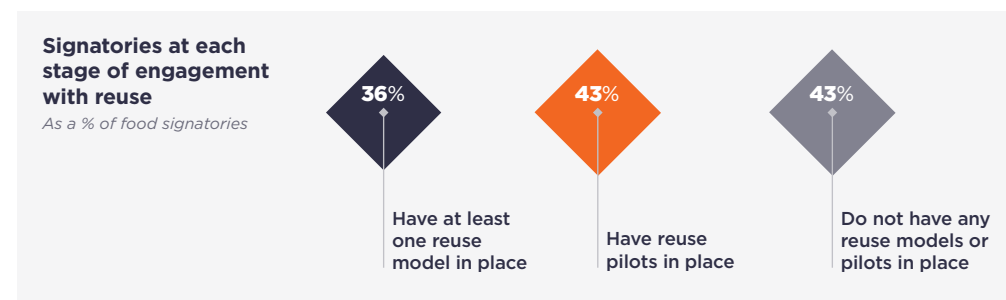
(i) Virgin reduction targets aim to decrease the total weight of virgin plastic in packaging and should be underpinned by efforts on reuse and elimination in addition to increasing the use of recycled content.

(ii) Total reduction targets aim to reduce the total weight of plastic packaging.

For more information on reduction targets read the [2021 Progress Report](#).

MOVING FROM SINGLE-USE TOWARDS REUSE MODELS

Average reusable plastic packaging in 2020: **0.4%** (=0pp vs 2019)²



TRENDS:

- Eight food signatories (57%) reported having reuse models in place or launching pilots in 2020. Four signatories (29%) implemented 'refill-on-the-go' models by offering refill stations for dry food in supermarkets and three signatories (21%) offered products using 'return-from-home' models, for example through the **Loop** platform.
- However, 11 signatories (79%) reported 0% of their plastic packaging was reusable and only **Danone**, which grew the volume of water sold through reuse models, increased its proportion of reusable plastic packaging. In addition, six signatories (43%) did not have reuse models or pilots in place and **Nestlé** was the only signatory launching more than three reuse pilots in 2020.

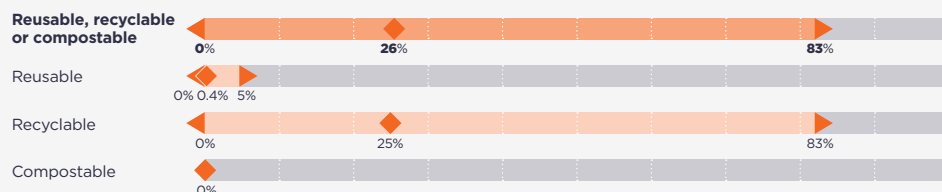
HIGHLIGHTS:

- Nestlé** ran 20 pilots for six product lines in six different countries in 2020, ranging from petcare to ice cream, and is planning to launch reusable options across 500 retail stores by 2025, including in emerging markets.
- Mars** piloted refill stations in France for two rice brands (allowing consumers to refill reusable bags in-store) and will launch additional pilots in Australia and Europe, including for its petcare products in partnership with Asda in the United Kingdom.

**100% REUSABLE, RECYCLABLE OR COMPOSTABLE (RRC)³**Average RRC in 2020: **26%** in 2020 (▼ 1.4pp vs 2019) || **2025 target: 100%**⁴**Share of reusable, recyclable, or compostable plastic packaging**

Average share of reusable, recyclable, or compostable plastic packaging for food signatories as a % of total plastic packaging weight

◀ Minimum ◆ Average ▶ Maximum

**TRENDS:**

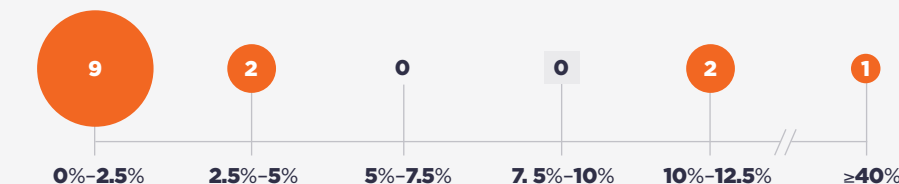
- Food signatories' recyclability percentages decreased on average by 1.5 percentage points in 2020, with some attributing this to a shift in product mix associated with the COVID-19 pandemic. The sector has the lowest recyclability average (25%) compared to other sectors due to its use of large volumes of non-recyclable packaging such as consumer-facing flexible packaging including pouches and wrappers, PET thermoforms and PP pots, tubs, and trays.
- Some signatories are taking actions to shift packaging portfolios away from non-recyclable polymers, such as PS, and PVC to more easily recyclable materials, such as PET or paper, as well as removing recycling disruptors including pigments and labels.

HIGHLIGHTS:

- Mondelez** reduced their use of several non-recyclable materials, including PS, PVC, PVDC, and undetectable carbon black pigment, in 4,905 metric tonnes of packaging. The company also contributed to a GBP 1 million UK fund to increase collection of flexible plastic for recycling, alongside **Mars UK, Nestlé, PepsiCo, and Unilever**.
- Ferrero** and **Mondelez** reported their participation in project HolyGrail, which is exploring the viability of using Digimarc Corporation's digital watermarking technology for accurate large-scale packaging sorting.
- Clif Bar & Company, Danone, Ferrero, FrieslandCampina, Mars, Nestlé, and Sovena** have explicitly and publicly recognised that EPR is the only proven way to ensure sufficient funding for the collection, sorting, and recycling of packaging, and that without it recycling is unlikely to ever scale.

POST-CONSUMER RECYCLED CONTENT (PCR) TARGETSAverage PCR in 2020: **2.6%**⁵ (▲ 1.4pp vs 2019) || **2025 target: 20%**⁶**Levels of post-consumer recycled content in plastic packaging**

Distribution of percentages of post-consumer recycled content in plastic packaging for food signatories

Minimum= 0% Average= **2.6%**⁷ Maximum= 67%**TRENDS:**

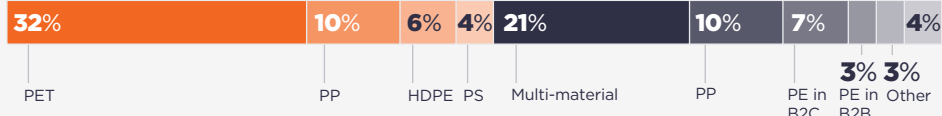
- Food signatories had the lowest post-consumer recycled content in 2020 compared to other sectors, at just 2.6%, with signatories reporting challenges sourcing recycled content of sufficient quality for food-contact applications due to stricter regulations.
- Nonetheless, four signatories (40%) increased their post-consumer recycled content from the previous year by an average of 4 percentage points, with most efforts centred on increasing recycled content in rigid PET packaging.

HIGHLIGHTS:

- Driscoll's** worked with suppliers to ensure that its PET clamshells were made from at least 10% recycled PET. By the end of 2020, following monthly 1-to-1 calls, all of its suppliers had either run pilots to include 10% rPET clamshells, or had begun actively producing clamshells containing at least 10% post-consumer recycled content.
- Nestlé** is looking to source 2 million tonnes of recycled plastics for food-contact packaging – recycled PP and PE – and has allocated more than CHF 1.5 billion to pay a premium for these materials by 2025.

PLASTIC PACKAGING PORTFOLIO BREAKDOWN**Plastic packaging portfolio breakdown⁸**

Average share of each plastic packaging category in food signatories' portfolios

RIGID PACKAGING**TRANSPARENCY****Key transparency metrics**

As a % of food signatories





ENDNOTES

- 1 PS = Polystyrene, PVC= Polyvinyl chloride
- 2 In this document, the quantitative metrics for 2020 and 2025 targets represent the non-weighted average of the data reported by all signatories in the sector. The year-on-year changes reported across all metrics refer to those seen for signatories reporting in both the last two years (i.e. data from signatories reporting for the first time in 2021 are not included as part of the change).
- 3 To be claimed as recyclable/compostable according to the Global Commitment definition of recyclable/compostable 'in practice and at scale', packaging needs to meet the thresholds of being recycled/composted at a 30% rate across multiple regions, collectively representing at least 400 million inhabitants. For more information, see 'How are recyclability and compostability assessed in the Global Commitment?' in the [2021 Progress Report](#).
- 4 In this document, the quantitative metrics for 2020 and 2025 targets represent the non-weighted average of the data reported by all signatories in the sector. The year-on-year changes reported across all metrics refer to those seen for signatories reporting in both the last two years (i.e. data from signatories reporting for the first time in 2021 are not included as part of the change).
- 5 The post-consumer recycled content average excludes Driscoll's, which is an outlier in this sector with a share of PCR of 67%.
- 6 In this document, the quantitative metrics for 2020 and 2025 targets represent the non-weighted average of the data reported by all signatories in the sector. The year-on-year changes reported across all metrics refer to those seen for signatories reporting in both the last two years (i.e. data from signatories reporting for the first time in 2021 are not included as part of the change).
- 7 The post-consumer recycled content average excludes Driscoll's, which is an outlier in this sector with a share of PCR of 67%.
- 8 HDPE= High-density polyethylene, PE = Polyethylene, PET = Polyethylene terephthalate, PP = Polypropylene
- 9 Packaging categorised as 'other' represents packaging not classified by signatories under any predefined categories but could include rigid or flexible packaging. This packaging was not assessed as recyclable in practice and at scale.

DISCLAIMER

All information on signatories' progress in this report and in the individual signatories' reports has been provided by the relevant signatories and has not been audited or verified by the Ellen MacArthur Foundation (Foundation) or UN Environment Programme (UNEP). Each signatory is responsible for the information it submitted. All visualisations accompanying individual progress reports have been produced by the Foundation.

The Foundation and UNEP have exercised care in the preparation of this report. However, all individual signatories' reports are made available by the Foundation and UNEP on an 'as is' basis and the Foundation and UNEP give no warranties as to their quality, accuracy, completeness, or fitness for any purpose. The Foundation and UNEP shall not be liable (whether in contract, tort (including negligence), breach of statutory duty, or otherwise) to any party in connection with the content or use of these reports. The Foundation and UNEP do not warrant that all information submitted by individual signatories is contained or represented in this report and, without limiting the generality of the foregoing, they may: (i) have excluded data which they believe to be inaccurate; (ii) have excluded from year-on-year calculations data from signatories which have not reported data in both years; and (iii) have normalised information to produce the aggregated and averaged statistics featured in this report. Further, if a signatory has not reported by the relevant deadline(s), its data will not be included in this report and it will not be the subject of an individual report. If you are a signatory and you believe there has been an error in the reproduction of the information provided to us by your organisation, please contact us as soon as possible at reportingGC@ellenmacarthurfoundation.org, or your contact at UNEP.



© COPYRIGHT 2021
 ELLEN MACARTHUR FOUNDATION
www.ellenmacarthurfoundation.org
 Charity Registration No.: 1130306
 OSCR Registration No.: SC043120
 Company No.: 6897785



[READ OTHER SECTORS INSIGHTS](#)



[EXPLORE SIGNATORIES' ONLINE DATA](#)



[READ THE GLOBAL COMMITMENT 2021 PROGRESS REPORT](#)



[DISCOVER WHAT ELIMINATION AND REUSE SOLUTIONS CAN BE IMPLEMENTED WITHIN YOUR ORGANISATION IN OUR UPSTREAM INNOVATION GUIDE](#)