

## ABOUT THESE SECTOR INSIGHTS:

This document presents insights and data on the progress made by cosmetics 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:

L'Oréal

L'OCCITANE en Provence

NATURA COSMETICS\*

*\*This signatory did not provide data using the same methodology for one or more metrics for 2019 and so is excluded from year-on-year comparisons for the relevant metric(s)*

# Cosmetics sector



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## KEY INSIGHTS

### **The adoption of new reduction targets is set to deliver significant reductions in virgin plastic use for cosmetics signatories between now and 2025.**

In 2020, two out of the three signatories decreased their use of virgin plastic in packaging, on average by 16%. Through reduction targets, all three signatories have now committed to further reduce virgin plastic in packaging – on average by 33% – by 2025.

### **Progress so far has largely been driven by a significant increase in the use of post-consumer recycled content.**

The three cosmetics signatories increased their proportion of post-consumer recycled content in the last year by an average of 7 percentage points – the strongest growth seen across the sectors analysed. Efforts centred on PET bottles and other rigid formats which are widely recycled and for which there is a corresponding greater supply of recycled materials. Going forward, the companies will also need to address the 68%, on average, of their packaging that is not recyclable, which includes mostly PE tubes, PP pots, tubs and trays, and consumer-facing flexible packaging such as pouches, as well as small format packaging and recycling disruptors such as metallised films and pumps with metal springs.

### **All three cosmetics signatories are actively engaged in reuse and elimination activities, but there remains scope to increase focus on avoiding single-use packaging altogether.**

All three cosmetics signatories reported work to expand their use of reuse models, with a focus on refillable and compact formats as well as in-store refill stations, alongside some efforts to eliminate plastic packaging altogether, for example by launching solid shampoos. However, most of the elimination or reduction efforts reported focused on material changes (such as substitution to other plastics or paper, or lightweighting), rather than on efforts to design out the need for single-use packaging altogether – this will require increased focus going forward.





## 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.

### Number of signatories with virgin and/or total plastic packaging reduction targets



### VIRGIN REDUCTION TARGET HIGHLIGHTS (i):

- All three cosmetics signatories – **L'Oréal**, **NATURA COSMETICS**, and **L'OCCITANE en Provence** – plan to reduce their use of virgin plastic in packaging by 33% from 2019 or 2018 baselines.

### TOTAL REDUCTION TARGET HIGHLIGHTS (ii):

- On top of its virgin reduction target, **L'OCCITANE en Provence** has also committed to reduce its total plastic packaging weight by 10% from its 2018 baseline.

(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](#).

## ELIMINATION OF PROBLEMATIC OR UNNECESSARY PLASTIC PACKAGING

### Top 5 plastic packaging categories targeted for elimination or reduction in the sector

Number of cosmetics signatories eliminating or reducing the plastic packaging category vs total number of signatories with the category in their portfolio



### TRENDS:

- Cosmetics signatories are most commonly targeting multilayer materials, PETG<sup>1</sup> in rigid packaging, and pumps and triggers to improve the recyclability of their packaging.
- All signatories were taking actions to avoid single-use packaging in the first place, including by implementing refill stations and through eliminating plastic packaging, including bottles and secondary flexible packaging. However, most of the elimination examples reported by cosmetics signatories involved material substitution (to other plastics or paper packaging) or lightweighting.

### HIGHLIGHTS:

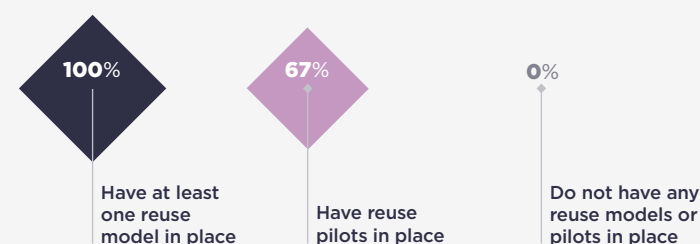
- **L'OCCITANE en Provence** and **L'Oréal** launched new solid shampoos, with **L'Oréal** reporting that the solid shampoo for its UltraDoux brand should avoid 1.5 million plastic bottles.
- **NATURA** and **L'OCCITANE en Provence** are reducing their use of cellophane wraps, with **L'OCCITANE en Provence** planning to completely phase out secondary cellophane wrapping by the end of 2022, as well as reducing its use of sachet samples.
- **L'Oréal** also reported plans to fully eliminate undetectable carbon black, PS, and PETG in rigid packaging, and to reduce the amount of metallised films in its portfolio by 2025.

## MOVING FROM SINGLE-USE TOWARDS REUSE MODELS

Average reusable plastic packaging in 2020: **17%** (▲ 6.9pp vs 2019)<sup>2</sup>

### Signatories at each stage of engagement with reuse

As a % of cosmetics signatories



### TRENDS:

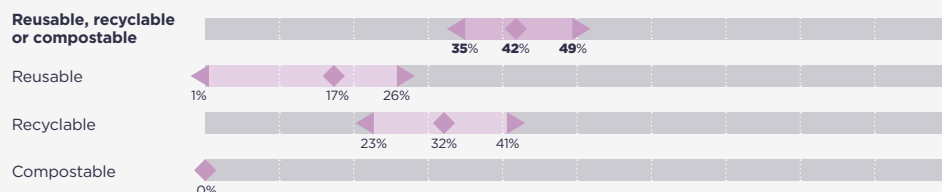
- All three cosmetics signatories have increased the share of their plastic packaging that is reusable and reported targets for implementing reuse models across either a minimum number of retail stores (**L'OCCITANE en Provence**) or a minimum number of product lines (**L'Oréal** and **NATURA**). **L'Oréal** and **NATURA** also reported plans to implement a large number of reuse pilots by 2025, at 57 and 67, respectively.
- Signatories were especially focused on 'refill-at-home' models, including refillable make-up formats, and 'refill on-the-go' models using refill stations in stores.

### HIGHLIGHTS:

- **L'OCCITANE en Provence** is deploying refill systems in 90 stores in 2021, aims to have reuse models in all its 3,000 stores worldwide by 2025 and is also testing refill solutions for hotels.
- **L'Oréal** launched 17 pilots in 2020, including for refillable make-up compacts and perfume bottles, and plans to launch a further 57 by 2025. The company has partnered with **Loop** to deliver 'return-from-home' models including for make-up and perfume packaging in China, and Vichy products in Austria.
- **Natura**, which reported the highest share of reusable plastic packaging in the sector at 26%, offers 'refill-at-home' models across eight product categories such as makeup and perfume in all their markets, including Latin America, Europe and the United States.

**100% REUSABLE, RECYCLABLE OR COMPOSTABLE (RRC)<sup>3</sup>****Average RRC in 2020: 42%** in 2020 (▲ 5.7pp vs 2019) || **2025 target: 100%**<sup>4</sup>**Share of reusable, recyclable, or compostable plastic packaging***Average share of reusable, recyclable, or compostable plastic packaging for retail signatories as a % of total plastic packaging weight*

◀ Minimum    ◆ Average    ▶ Maximum

**TRENDS:**

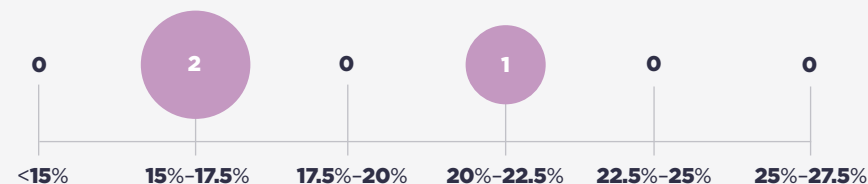
- The average proportion of reusable, recyclable, or compostable plastic packaging increased as signatories grew their share of reusable and recyclable packaging. Most efforts on recyclability looked to remove recycling disruptors, such as developing pumps without metal components, replacing metallised films, and eliminating PETG in bottles.
- Still, on average 68% of signatories' plastic packaging remains non-recyclable. As well as packaging in small formats or with recycling disruptors, companies also have a high proportion of PP pots, tubs, and trays, consumer-facing flexibles such as pouches, and PE tubes, which are not recyclable. This will need addressing by innovating away from these packaging types or scaling recycling infrastructure.

**HIGHLIGHTS:**

- **L'Oréal** increased its proportion of recyclable packaging by 9 percentage points to 41% in 2020 by working with Recyclclass and APR to remove recycling disruptors. The company is also investigating removing metallised labels and foil barriers.
- **L'OCCITANE en Provence** reported plans to eliminate 100% of PETG in its packaging by 2025 to improve recyclability.
- **L'OCCITANE en Provence** and **L'Oréal** 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) TARGETS****Average PCR in 2020: 17%** (▲ 7.1pp vs 2019) || **2025 target: 38%**<sup>5</sup>**Levels of post-consumer recycled content in plastic packaging***Distribution of percentages of post-consumer recycled content in plastic packaging for cosmetics signatories*

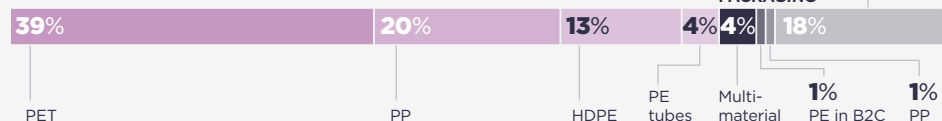
Minimum= 15%    Average= 17%    Maximum= 21%

**TRENDS:**

- All three cosmetics signatories increased their post-consumer recycled content by at least 6 percentage points in 2020.
- The signatories increased recycled content in PET bottles as well as in other products such as jars and PE tubes. **NATURA COSMETICS** reported that its increase in recycled content was also due to a product volume shift as a result of the COVID-19 pandemic towards products with higher levels of recycled content, such as personal hygiene products.

**HIGHLIGHTS:**

- **L'OCCITANE en Provence** increased its post-consumer recycled content by 7 percentage points in 2020, and now has the highest proportion in the group at 21%. The company reported integrating more recycled content (from 50% to 100%) into its newly launched and relaunched bottles.
- **L'Oréal** increased its post-consumer recycled content by 9 percentage points to 16% through focusing on PET bottles, HDPE bottles, and PE tubes for at least 10 different products.

**PLASTIC PACKAGING PORTFOLIO BREAKDOWN****Plastic packaging portfolio breakdown<sup>6</sup>***Average share of each plastic packaging category in cosmetics signatories' portfolios***RIGID PACKAGING****TRANSPARENCY****Key transparency metrics***As a % of cosmetics signatories*



## ENDNOTES

- 1 PETG = Polyethylene terephthalate glycol
- 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 Ibid.
- 6 HDPE= High-density polyethylene, PE = Polyethylene, PET = Polyethylene terephthalate, PP = Polypropylene
- 7 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.

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