

FLEXIBLE PACKAGING:

- Overarching strategy
- 21 urgent actions
- 3 geographic archetypes



Strategy Summary

OVERARCHING STRATEGY FOR FLEXIBLE PACKAGING

[Click here for the executive summary.](#)

MOVE AWAY

Eliminating and innovating away from single-use flexible packaging must be the first and foremost part of any flexible packaging strategy.

CIRCULATE

For the single-use flexible packaging items that cannot currently be eliminated without unintended consequences, unprecedented efforts are required to ensure they can be circulated.

SUBSTITUTION

To paper or compostable flexibles and ensuring circulation.

RECYCLING

Staying with plastic flexibles and ensuring circulation.

DRIVE A STRONG UPSTREAM INNOVATION AGENDA

While they are currently a necessary part of the solution, inherent limitations of recycling and substitution strategies means that staying with single-use flexibles will always present a challenge from a circular economy perspective and we need to keep driving a strong upstream innovation agenda.

Businesses to:

Policymakers, collaborative cross-sector initiatives and businesses (through advocacy) to:

MOVE AWAY

Direct

1. Exhaustively identify and action opportunities for direct elimination*, taking inspiration from existing case examples
2. Embed a critical assessment of the need for flexible packaging in all new product development processes*

**On average, 5-10% of a flexibles portfolio can be considered unnecessary*

Innovative

4. Introduce a high-priority and well-resourced R&D agenda to make upstream innovation THE major component of every flexibles strategy
5. Set-up sector specific collaborative initiatives with specific objectives (such as facilitating roll out of an existing innovation or answering key questions for a more nascent solution)

3. Align on priority items to eliminate within sectors (e.g. personal care, clothing, fruit and vegetables) to drive up the ambition level across the entire industry

6. Create a supportive policy landscape for innovation (e.g. introduce subsidies, bans, EPR).

RECYCLING

7. Radically improve packaging design, in particular, shift to mono-materials for the >40% of flexibles that are currently multi-material.

Formal

8. Set separate recycling targets for flexibles (e.g. in Europe revisit the 2030 targets).
9. Increase EPR fees for flexibles (e.g. in Europe, fees of -EUR 1,100 are a good estimate of what may be required)
10. Expand collection of flexibles for recycling (e.g. in Europe >40% of the population do not have access to separate collection for flexibles)
11. Invest in infrastructure (e.g. >EUR 2 billion in Europe).

Informal

12. Establish an inclusive process, gathering data on existing structures and processes and identifying informal sector organisations to work with.
13. Finance improvements in infrastructure, tech and tools through large infrastructure investments and microfinancing for the informal sector.
14. Roll out holistic waste management legislation, including inclusive EPR legislation.

SUBSTITUTION

Paper

15. For your organisation's entire paper-based packaging portfolio, put in place a robust reduction, virgin reduction and regenerative sourcing strategy — to ensure that substitution from plastic to paper flexibles does not increase demand for virgin paper.
16. Improve paper packaging design so that all paper-based packaging fits into both recycling and composting systems.

Compostables

18. For applications supporting the collection of food waste or addressing existing contamination in composting systems: Implement compostable materials.
19. Before pursuing compostables as a broader strategy for flexibles: Demonstrate the mechanisms that would need to be in place to prevent contamination of both the composting and recycling systems.

17. Increase collection and recycling rates for paper-based flexibles.

20. Define and implement best practices for composting of food waste and align compostable packaging standards with this.

21. Roll out collection and composting infrastructure for food and organics

Geographic archetype 1

Geographies with low volumes of mismanaged packaging waste, and advanced waste management systems.

For example: Established recycling systems producing high-quality recyclate; mandatory EPR.

Proxy geography: Europe

Geographic archetype 2

Geographies with low volumes of mismanaged packaging waste, but less advanced waste management systems.

For example: Recycling systems are limited in scale or have considerable loss of material quality; emerging, limited or voluntary EPR.

















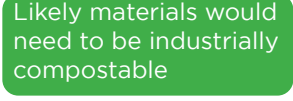
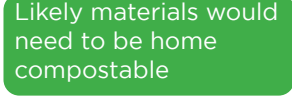
Proxy geography: USA

Geographic archetype 3

Geographies with high volumes of mismanaged packaging waste and limited/ no waste management systems.

For example: Limited systems even for collection; No/limited EPR.

Proxy geography: South and South-East Asia

MOVE AWAY	<u>Direct</u>			
	<u>Innovative</u>			
RECYCLING	<u>Formal</u>			
	<u>Informal</u>			
SUBSTITUTION	<u>Paper</u>			
	<u>Compostables</u>			

This document is a short strategy summary. Detailed insights, analysis, and actions are found within the deepdive documents and on the website.

WEBSITE

Easily digestible overview of the different strategies for flexible packaging, and the key insights and actions for each.

[Click here](#)

EXECUTIVE SUMMARY

Short, high-level strategy document. Doesn't contain any analysis, reasoning or details for the key actions.



STRATEGY DEEPDIVES

Detailed insights and analysis, and detailed key actions for the different strategy options.



SUPPLEMENTARY INFORMATION

Supporting data and references.





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