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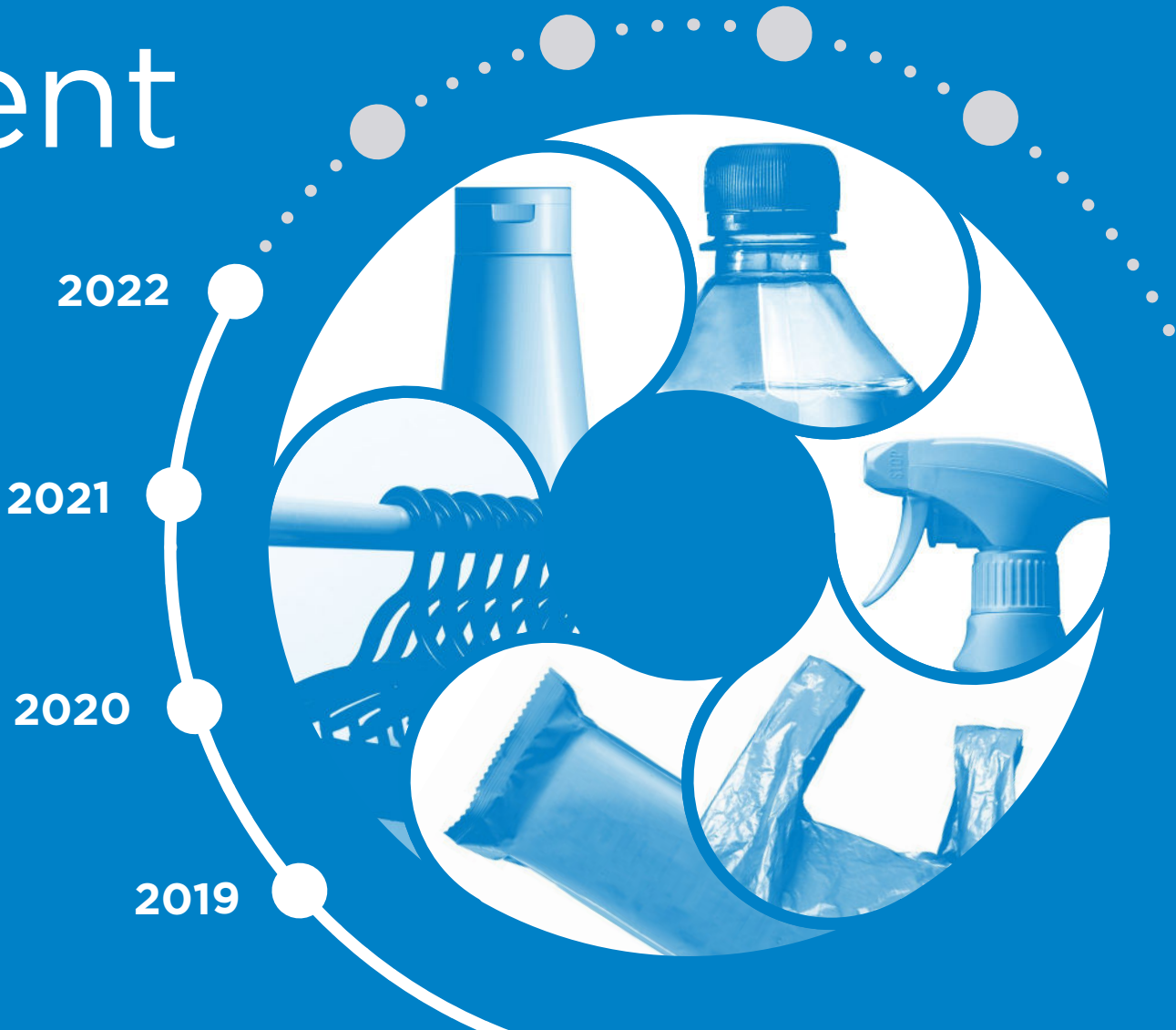
This report has been compiled by the Ellen MacArthur Foundation, with input from the UN Environment Programme in relation to the government signatories.

The Global Commitment 2022 Progress Report



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EXECUTIVE SUMMARY

Driven by the goal of tackling plastic pollution at its source, through the Global Commitment and Plastic Pact network more than 1,000 businesses, governments, and other organisations have united behind a common vision of a circular economy for plastic, in which it never becomes waste. Signatories to the Global Commitment, which together account for more than 20% of the plastic packaging market, have set ambitious 2025 targets to help realise that common vision. This fourth annual progress report looks at how the signatories are faring against these targets.

THIS REPORT HAS THREE KEY FINDINGS:

1

While strong progress is being made in some areas, key 2025 targets are expected to be missed.

2

The prospect of not meeting all 2025 targets reinforces the urgency for businesses to accelerate action, particularly around reuse, flexible packaging, and decoupling business growth from packaging use.

3

Governments need to take immediate action to accelerate progress and have the opportunity to promote a high ambition level in upcoming negotiations for a legally binding instrument on plastic pollution.

The Global Commitment will continue to drive progress, provide unprecedented transparency, and inform legislation.

PERSPECTIVE ON PROGRESS

1 While strong progress is being made in some areas, key 2025 targets are expected to be missed.

While this section mainly provides insights at aggregate level, it also highlights that in almost all areas progress varies widely across signatories. In almost all areas, selected signatories are demonstrating that more progress is possible.

A. The target of 100% reusable, recyclable, or compostable plastic packaging will almost certainly be missed by most organisations, with flexible packaging and lack of infrastructure being the main barrier.

- For the third year in a row, the share of reusable, recyclable, or compostable plastic packaging has increased slightly (+ 1.7pp) to 65.4%. This percentage varies widely across signatories — from below 20% to close to 100% — mainly driven by the types of packaging in their packaging portfolio.
- Businesses are making and planning major investments in designing packaging to be technically recyclable. This is an important step forward. At the same time, it is important to recognise that a more fundamental rethink of packaging, products, and business models will be required for some packaging types or geographies to achieve the target.
- Around 16% of signatories' packaging is flexible packaging — e.g. sachets and films — a packaging category that is increasingly unlikely to meet recyclability in practice and at scale by 2025.
- For rigid plastic packaging types that are not recyclable in practice and at scale today — accounting for on average 11% of signatories' portfolios — accelerated investments in infrastructure are key to make progress on the target.

B. Strong progress on increasing the use of recycled plastics continued, leading to brand and retail signatories doubling their use of recycled content in three years.

- Signatories' share of post-consumer recycled (PCR) content has doubled from 4.8% in 2018 to 10.0% in 2021. In other words, PCR content increased as much during the past three years as it did in all preceding years since plastic packaging was first introduced.
- Reaching the aggregate target of 26% PCR content by 2025 will require progress to accelerate further, along an exponential growth curve.
- 60% of signatories have added at least 2 percentage points PCR since 2018 and 14 businesses, including **Keurig Dr Pepper, L'Oréal, SC Johnson,** and **Unilever**, have added over 10 percentage points in that time period.

C. The majority of signatories continued to decrease virgin plastic use, yet the collective virgin plastic use of the entire group has risen back to 2018 levels.

- As a group, brands and retailers have significantly increased their total plastic packaging use (+4.3%) in 2021 vs 2020. This increase has outpaced progress on recycled content, leading to a 2.5% increase in their use of virgin plastic compared to 2020, which is back to similar levels as 2018.
- The majority of brands and retailers (59%) have reduced their virgin plastic use from 2018 to 2021, and 40% also decreased their total plastic packaging use in the same period, showing that significant reduction is indeed possible.
- However, as the group of signatories that increased their total and virgin plastic use includes a few of the biggest plastic packaging users, the collective virgin plastic use is back at 2018 levels and the total plastic use has increased (+5.0%) since 2018.
- Signatories that were most hit by the pandemic restrictions in 2020, such as some fashion brands and on-the-go restaurants, had significantly higher sales — and therefore increased use of plastic packaging — in 2021. This increase also contributed, to a small extent, to the lack of virgin plastic use reduction in 2021.

D. We welcome the first announcements of reuse targets by major brands, while more broadly both progress and ambition on reuse are still lacking.

- Signatories' share of reusable plastic packaging decreased slightly compared to last year and is now at an average of 1.2%.
- It has been positive to see the first explicit reuse ambitions being announced by major brands, **The Coca-Cola Company** and **PepsiCo**. It is important to see more businesses follow their lead and to translate these ambitions into real progress.
- Overall, reuse ambitions remain limited, as very few brands and retailers have a reuse strategy in place. Despite an increasing number of reuse pilots, many are fragmented and not embedded in a business strategy that could lead to reuse at scale.

PERSPECTIVE ON PROGRESS

2 The prospect of not meeting all 2025 targets reinforces the urgency for businesses to accelerate action, particularly around reuse, flexible packaging, and decoupling business growth from packaging use.

The prospect of missing some targets should be a powerful motivator for signatories to double down on their efforts. Continued and accelerated progress is essential. It is also possible, as demonstrated by some signatories in all target areas. We call on businesses to prioritise the following strategic actions:

A. Every brand and retailer needs to develop and execute an ambitious reuse strategy with credible action plans that can lead to reuse models being deployed at scale.

- It has been positive to see the first explicit reuse ambitions being announced by major brands this year and to see more businesses put in place reuse-specific staff. It is crucial for many more businesses to develop concrete, credible reuse strategies and ambitions, and to turn these into meaningful action.

B. A bold, new approach — far beyond anything we have seen before — is urgently needed to address the fast-growing issue of flexible packaging waste.

- A credible approach and action plan to address the challenging and growing issue of flexible packaging waste is needed more urgently than ever. Current fragmented efforts, driven by individual businesses alone, will not address this issue in the foreseeable future.
- The Ellen MacArthur Foundation's recent study showed that a bold, new approach — far beyond anything we have seen before — is needed to address the fast-growing issue of flexible plastic packaging waste. The study lists 21 urgent actions and concludes that, once created, flexible packaging waste is challenging to deal with; therefore a significant emphasis on innovating away from this packaging format wherever possible needs to be part of any flexible packaging strategy.

C. To accelerate progress on the virgin reduction target, businesses need to not only exponentially increase the use of recycled plastics but also curb the growth in total plastic packaging use.

- Despite good progress to date and challenging market conditions, such as increased prices and limited supply, further accelerating the increase in the use of recycled plastics needs to remain a high priority.
- Curbing the growth in packaging use — by developing and scaling solutions that reduce the need for single-use packaging — is also essential to avoid such growth outpacing PCR progress. There is untapped potential to more fundamentally redesign packaging, innovate products, and transform business models in ways that reduce the need for single-use packaging.

D. Accelerated investments in infrastructure and packaging redesign are needed to achieve 100% recyclability for rigid plastic packaging.

- For rigid plastic packaging categories that are not yet proven to be recyclable in practice and at scale,[1] such as PP non-bottle and PET thermoforms, further investments are needed to scale collection, sorting, and recycling infrastructure.
- Increased efforts on packaging redesign will also be required. For example, a 4 percentage point progress towards the 100% reusability, recyclability, or compostability target is possible if businesses comply with recyclability design guidelines for rigid packaging types that are recyclable in practice and at scale today.

PERSPECTIVE ON PROGRESS

3 Governments need to take immediate action to accelerate progress and have the opportunity to promote a high ambition level in upcoming negotiations for a legally binding instrument on plastic pollution.

A. Among governments, explicit support for a circular economy approach to plastic pollution continues to grow.

- In 2022, 34 additional national and sub-national governments across different continents agreed to join the Global Commitment. Together with existing signatories, they represent more than 1 billion people.
- Ten government signatories have already set quantitative targets, most notably on increasing collection, sorting, and recycling rates; stimulating the elimination of problematic or unnecessary plastic packaging or products; and incentivising the use of reusable, recyclable, or compostable plastic packaging. All government signatories will be requested to have quantitative targets in place next year.

B. An urgent and significant acceleration of policy efforts is required, as voluntary industry efforts alone will not be enough to end plastic pollution.

- Policy plays an important role in creating the enabling conditions, incentives, and common rules for all market participants. This is crucial to ensure all stakeholders take action.
- An acceleration of policy efforts across different areas is required:
  - To stimulate reuse: Policy can accelerate the adoption of reuse models or unlock reuse barriers, especially where industry-wide shared infrastructure or collaboration is required. Examples include reuse targets or mandates for specific applications and mandatory deposit systems.
  - To address flexible packaging waste in emerging economies: In regions with an extensive sachet economy, it is challenging for alternative packaging or delivery models to compete due to price/affordability factors and sachet-optimised supply chains. Regulatory interventions include integrated policy packages, such as those combining subsidies for reusable packaging with bans of sachets for specific applications.
  - To make recycling infrastructure and economics work: Mandatory EPR schemes, are widely recognised as a necessary part of the solution, without which packaging recycling is unlikely to be meaningfully scaled.
- At the fifth United Nations Environment Assembly, Member States adopted a historic resolution to create an international legally binding instrument on plastic pollution, including in the marine environment, with the ambition to complete negotiations by the end of 2024. This resolution also calls upon Member States to continue and step-up actions to combat plastic pollution, which may include the implementation of circular economy approaches. The Global Commitment is a very useful framework for action by governments and industry, directly contributing to the shift to a circular economy for plastics.

C. The upcoming negotiations for an international legally binding instrument present a unique opportunity to accelerate and harmonise policies and actions globally, towards a circular economy for plastic.

- Negotiations between all UN Member States beginning in November 2022 aim to develop an international legally binding instrument on plastic pollution, including in the marine environment. It is paramount that such a global instrument is robust and builds on existing initiatives to create a circular economy for plastics. The negotiations are a unique opportunity to set a clear direction, ambition level, and governance structure for the whole world to address this challenge in the mid- to long-term. The potential has been shown by a group of 25 like-minded countries that have taken the initiative to form a High Ambition Coalition to End Plastic Pollution, committing to an overarching political vision to end plastic pollution by 2040.
- Governments now have the support of the Business Coalition for a Global Plastics Treaty, convened by the Ellen MacArthur Foundation and World Wide Fund for Nature (WWF), in collaboration with 80+ aligned businesses, financial institutions and supporting NGOs. In a strong signal of their ambition for the negotiation process, the endorsing organisations agree that the treaty must support progress on a number of key outcomes including the reduction of plastic production and use through a circular economy approach, increased circulation of necessary plastic, and the prevention and remediation of hard-to-abate micro- and macro-plastic leakage into the environment. Many Global Commitment signatories are among the early endorsers of the Coalition's Vision Statement and will share their insights on implementing circular economy solutions for plastics with the government negotiators.

PERSPECTIVE ON PROGRESS

The Global Commitment will continue to drive progress, provide unprecedented transparency, and inform legislation.

Continuing to drive progress with those businesses that have voluntarily committed to ambitious targets is essential to progress the transition to a circular economy for plastics.

- Ahead of many of their peers, Global Commitment signatories have voluntarily stepped forward to set ambitious 2025 targets and report on these with transparency. However, progress is not as fast as was hoped, the problem is not going away, and, while vital, policy alone will not solve the issue. It is therefore crucial for this group of leading signatories to continue to accelerate action and deliver meaningful impact that the rest of the industry can follow.
- To date, the Global Commitment has aligned more than 1,000 businesses, governments, NGOs, and other organisations behind a common vision of a circular economy for plastics and concrete 2025 targets. It has mobilised over USD 10 billion of investments, catalysed tough conversations, and driven strong progress in certain areas. It is now essential to build on this momentum and accelerate action in all areas.

Transparent reporting on progress is crucial to inform decision-making and maintain accountability.

- The Global Commitment will continue to provide unprecedented transparency. Before joining the Global Commitment, many businesses were unaware of how much plastic packaging they were putting on the market. Today, signatories' plastic usage and progress towards the targets is transparent and publicly available. This transparency is crucial for signatories to take more informed and targeted actions, and for investors and other organisations to hold signatories accountable. This transparency will continue to inform all stakeholders, highlighting possibilities and barriers to creating a circular economy for plastics.
- Building on the best practices and existing frameworks developed through the Global Commitment, as of 2023, plastic disclosure will be added to CDP's environmental reporting platform aiming to expand this transparency to cover thousands of businesses over time. Strengthened transparency and accountability could lead to more harmonised disclosure obligations and reporting standards, using common rules on data and information sharing across the plastics value chain.

The insights of the Global Commitment will continue to inform policymakers and drive systemic change beyond organisations doing so voluntarily.

- Voluntary commitments are key to accelerate progress but they cannot be the only mechanism to create systemic change towards a circular economy. Policies and regulations play a crucial role. Aligning the actions of governments, businesses, and civil society is key to promoting cooperation at local, regional, national, and global levels.
- The Global Commitment's vision, targets, and common definitions have already informed regulatory developments at different levels and can continue to be valuable assets to inform policymakers to set the right direction and create the enabling conditions to successfully scale a circular economy for plastic. The more transparency we are gaining on actual progress, the more relevant insights will become to inform us what the specific roadblocks are and how policy interventions could help overcome these.

KEY PROGRESS METRICS

TARGET	CURRENT TRAJECTORY[2]	ACTIONS TO ACCELERATE PROGRESS
1 Ensure 100% of plastic packaging is reusable, recyclable, or compostable Committed by all packaging producers, brands and retailers	• For two consecutive years, brand and retail signatories slightly increased the share of reusable, recyclable, and compostable plastic packaging: from 63.2% in 2019 to 65.4% in 2021 • Due mainly to differences in packaging portfolios, the percentage of reusable, recyclable and compostable plastic packaging varies widely across signatories: from below 20% to close to 100%. Signatories with a high share of flexible plastic packaging are expected to miss the target	• Shift to technically recyclable packaging design • Establish a credible plan to address the fast-growing issue of flexible packaging waste • Continue to eliminate rigid plastic packaging categories that are unlikely to be recycled in practice and in scale and invest in collection, sorting and recycling infrastructure for the others
2 Increase the share of post-consumer recycled content target across all plastic packaging used Plastic producers, packaging producers, and brands and retailers set PCR content targets ranging from 2% to 100%. For all brands and retail signatories in aggregate, this translates to a target of 26%	• Brand and retail signatories more than doubled their use of PCR content over the past three years (from 4.8% to 10.0%). Their combined 2025 target (26%) remains in reach with an acceleration of efforts • While it is clear that many businesses will face difficulties reaching their PCR targets, around 23% of brands and retailers are on track to achieve their 2025 target based on their progress to date	• Implement best practices shared by signatories that are making significant progress on PCR content, e.g. securing supply through long-term contracts (see chapter 5) • Incorporate PCR content in more challenging packaging types, such as food-contact packaging
3 Decrease the use of virgin plastic in packaging As of 2021, brands and retailers have set targets to reduce plastic or virgin plastic use in packaging by 2025. Targets range from 0.5% to 100%. In aggregate, the group aims for an 20% reduction in virgin plastic use between 2018 and 2025	• Following two consecutive years of declining virgin plastic use, brand and retail signatories' aggregated use of virgin plastic has risen back to 2018 levels • The majority of brands and retailers (59%) have reduced their virgin plastic use from 2018 to 2021. The group that increased their total and virgin plastic use includes a few of the biggest plastic packaging users	• Fundamentally reduce the amount of plastic packaging used, going beyond incremental improvements and eliminate the need for packaging in the first place • Increase the share of post-consumer recycled content (see related target above)
4 Take action to move from single-use towards reuse models where relevant Qualitative target committed to by packaging producers, brands, and retailers	• For the second consecutive year, brand, and retail signatories' share of plastic packaging that is reusable has slightly declined, and is now at an average of 1.2% • Two major brands announced/plan to announce quantitative reuse targets	• Develop and execute an ambitious reuse strategy with credible action plans that lead to reuse models being deployed at scale • Collaborate with industry peers, e.g. through sharing learnings on reuse pilots and models, and/or through creating a shared reuse infrastructure • Engage with policymakers to create the right enabling conditions
5 Eliminate problematic or unnecessary plastic packaging Qualitative target committed to by packaging producers, brands, and retailers	• Examples of elimination efforts across all packaging types and categories increased compared to last year • Elimination efforts are mainly delivered through material change (e.g. paper substitution, lightweighting) (78%) compared to fundamental change (e.g. direct elimination) (22%)	• Fundamentally rethink packaging (e.g. direct elimination), products (e.g. redesigning the product to eliminate the need for packaging altogether), and business models (e.g. introduce reuse models) to reduce the need for single-use packaging

KEY PROGRESS METRICS

1 Ensure 100% of plastic packaging is reusable, recyclable, or compostable

Percentage (of total weight) of brand and retail signatories' plastic packaging that is reusable, recyclable, or compostable (RRC)

FIGURE 1

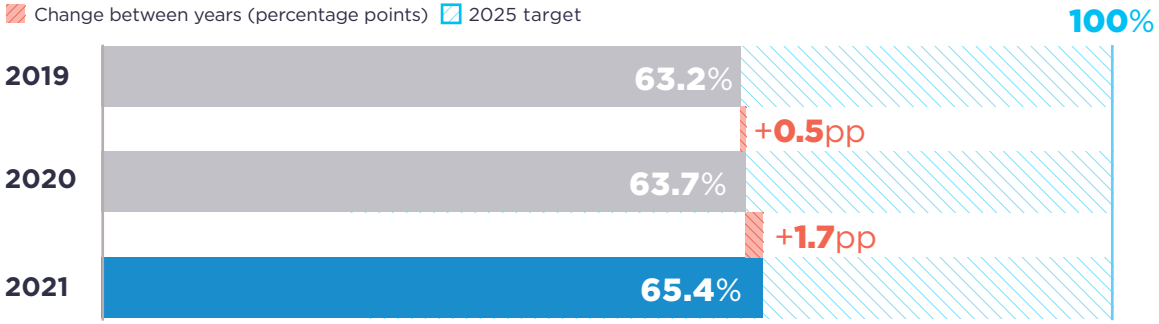
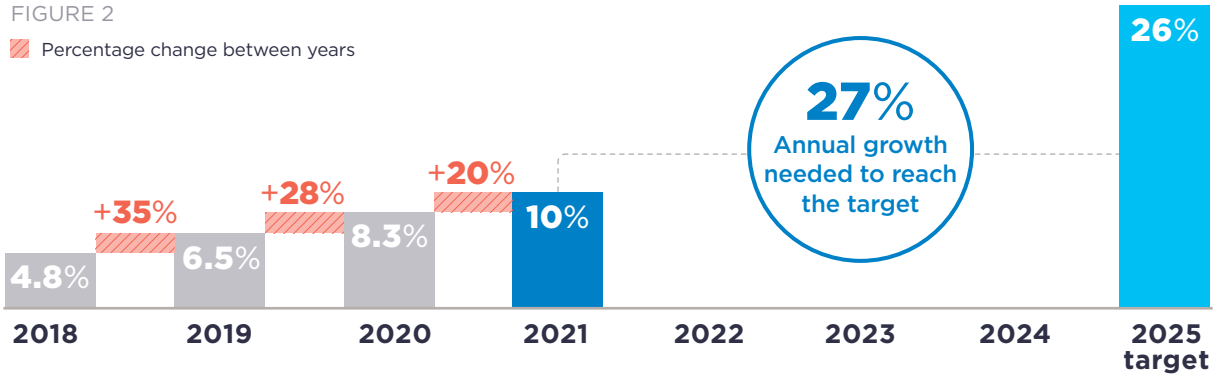


FIGURE 2



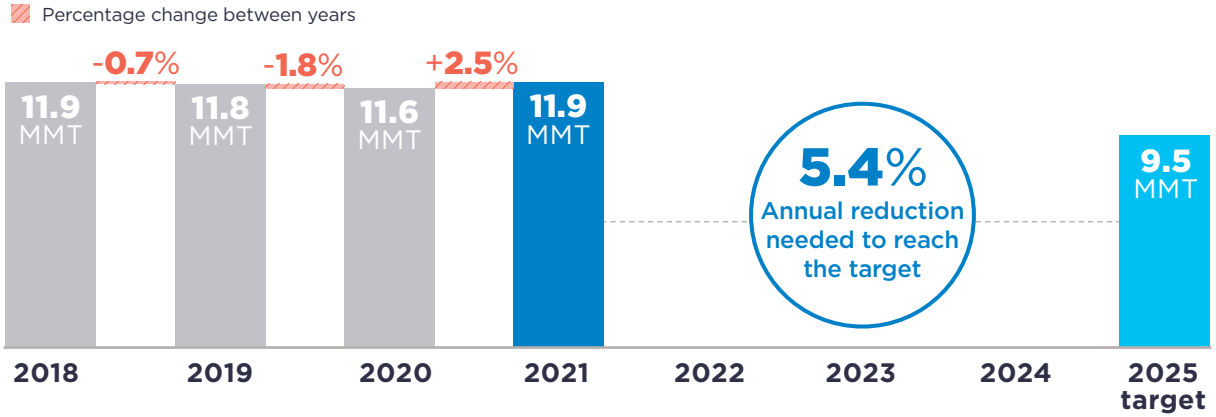
2 Increase the share of post-consumer recycled content target across all plastic packaging used

Percentage (of total weight) of post-consumer recycled (PCR) content in brand and retail signatories' plastic packaging

3 Decrease the use of virgin plastic in packaging

Weight of brand and retail signatories' virgin plastic packaging in million metric tonnes (MMT)

FIGURE 3



KEY PROGRESS METRICS

FIGURE 4

4 Take action to move from single-use towards reuse models where relevant

Percentage (of total weight) of brand and retail signatories' plastic packaging that is reusable

5 Eliminate problematic or unnecessary plastic packaging

Total number of elimination examples for 2020 and 2021 reported by packaging producer, brand, and retail signatories with percentage of elimination examples by method in 2021 highlighted (as reported by packaging producer, brand, and retail signatories)

FIGURE 5

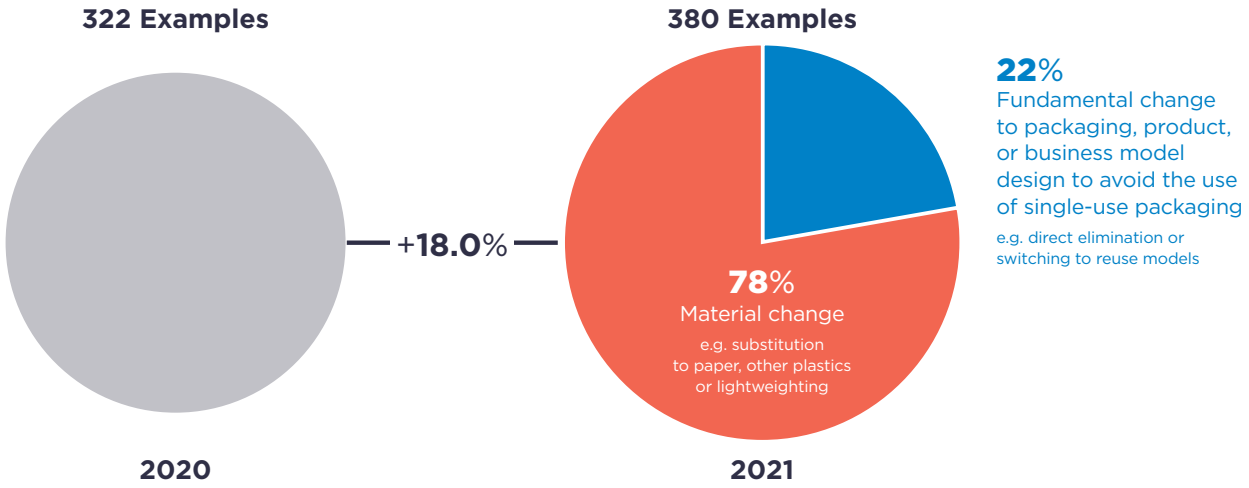


FIGURE 6

Top 10 FMCG companies by revenue: key progress metrics on plastic packaging, 2018–2021

2018 Baseline year
2021 2025 target

	TOTAL WEIGHT of plastic packaging in metric tonnes in 2021	DECREASE VIRGIN PLASTIC USE Weight of virgin plastic packaging in metric tonnes	INCREASE THE SHARE OF POST-CONSUMER RECYCLED (PCR) CONTENT % of PCR content weight in total plastic packaging	ENSURE 100% OF PLASTIC PACKAGING IS REUSABLE, RECYCLABLE, OR COMPOSTABLE (RRC) % of total plastic packaging weight that is reusable, recyclable, or compostable	MOVE FROM SINGLE-USE TOWARDS REUSE MODELS % of total plastic packaging weight that is reusable
Nestlé Food	**920**k	-33% 2018 950k 2021 878k -8%	30% 0.2% 4.6% +4.4	100% 49% 45% -4	1% 1% =0
Procter & Gamble	Not a Global Commitment Signatory				
PepsiCo Beverages	**2,500**k	-5% 2020 2,233k 2021 2,343k +5%	25% 3% 6.3% +3.3	100% 77% 76.1% -0.9	Not reported
AB InBev	Not a Global Commitment Signatory				
Unilever* Household and Personal Care	**713**k	-50% 2018 694k 2021 587k -15%	25% 0.7% 17.7% +17	100% 50% 53% +3	0.1%
JBS	Not a Global Commitment Signatory				
Tyson Foods	Not a Global Commitment Signatory				
The Coca-Cola Company** Beverages	**3,224**k	-20% 2019 2,692k 2021 2,786k +3%	25% 9% 13.6% +4.6	100% 99% 99.9% +0.9	4% 1.3% -2.7
Mars, Incorporated Food	**204**k	-25% 2019 183k 2021 204k +11%	30% 0% 0% =0	100% 23% 20% -3	0% 0% =0
L'Oréal Cosmetics	**144**k	-33% 2019 121k 2021 114k -5%	50% 4.7% 21% +16.3	100% 30.3% 39.1% +8.8	0.4% 1% +0.6

Notes:
a) Signatories are ranked according to their revenues as of the beginning of the Global Commitment in 2018.
b) 2018 data reported in this table might differ from previous reports as companies might have updated previous years' data.
c) Year-on-year growth is calculated in percentage for virgin weight and using percentage points for all other metrics.
d) All quantitative data are provided for the latest year reported, in most cases for the relevant company's financial year ending 2021. Details of the reporting timeframe for each signatory are provided in their individual reports online.
e) To find more information about individual plastic reduction targets, baseline years, and baseline weight, please look at the online reports.
** Reporting scope is limited to primary and secondary plastic packaging in 27 markets representing 82% of turnover.*
*** Reporting scope is limited to PET primary plastic packaging.*

FIGURE 7

Other large FMCG companies by revenue: key progress metrics on plastic packaging, 2018–2021

2018 | Baseline year | 2021 | 2025 target

	TOTAL WEIGHT of plastic packaging in metric tonnes in 2021	DECREASE VIRGIN PLASTIC USE Weight of virgin plastic packaging in metric tonnes	INCREASE THE SHARE OF POST-CONSUMER RECYCLED (PCR) CONTENT % of PCR content weight in total plastic packaging	ENSURE 100% OF PLASTIC PACKAGING IS REUSABLE, RECYCLABLE, OR COMPOSTABLE (RRC) % of total plastic packaging weight that is reusable, recyclable, or compostable	MOVE FROM SINGLE-USE TOWARDS REUSE MODELS % of total plastic packaging weight that is reusable
Danone Food	733k	2019 715k → 2021 656k: -33% → -8%	6.4% → 10.6%: 50% → +4.2	65.5% → 74.2%: 100% → +8.7	3.7% → 4.1%: +0.4
Mondelez* Food	198k	2020 189k → 2021 197k: -5% → +4%	0.3% → 0.5%: 5% → +0.2	5% → 5.9%: 100% → +0.9	0% → 0%: =0
Henkel Household and Personal Care	341k	2018 334k → 2021 290k: -33% → -13%	7% → 14.3%: 30% → +7.3	74% → 67.9%: 100% → -6.1	0% → 1.6%: +1.6
Colgate-Palmolive Household and Personal Care	279k	2019 262k → 2021 238k: -33% → -9%	6.5% → 14.2%: 25% → +7.7	57% → 60.3%: 100% → +3.3	0% → 0%: =0
Diageo** Beverages	40k	**Total plastic 2020 42k → 2021 40k: -5% → -6%	0% → 3.2%: 40% → +3.2	81% → 72%: 100% → -9	0% → 0%: =0
Reckitt Household and Personal Care	199k	2020 194k → 2021 191k: -30% → -1%	3% → 4%: 25% → +1	59% → 64%: 100% → +5	5% → 5%: =0
SC Johnson Household and Personal Care	91k	2018 95k → 2021 74k: -30% → -22%	4.5% → 19.2%: 25% → +14.7	51.4% → 57.3%: 100% → +5.9	3.4% → 6.9%: +3.5
Kellogg*** Food	64k	2021 64k: -5%	0% → 0.03%: 10% → +0.03	16% → 12.7%: 100% → -3.3	0%
Essity Household and Personal Care	40k	2018 41k → 2021 38k: -5% → -8%	0% → 5%: 25% → +5	18% → 15.8%: 100% → -2.2	0% → 0%: =0
FrieslandCampina* Food	48k	2019 55k → 2021 47k: -7% → -15%	0% → 2.3%: 15% → +2.3	25.6% → 26.6%: 100% → +1.0	2.5% → 0.5%: -2

Notes:

a) 'Other large FMCGs' refers here to those with the highest revenues after the Top 10 displayed on p.11, as of beginning of the Global Commitment in 2018.

b) 2018 data reported in this table might differ from previous reports as companies might have updated previous years' data.

c) Year-on-year growth is calculated in percentage for virgin weight and using percentage points for all other metrics.

d) All quantitative data are provided for the latest year reported, in most cases for the relevant company's financial year ending 2021. Details of the reporting timeframe for each signatory are provided in their individual reports online.

e) To find more information about individual plastic reduction targets, baseline years, and baseline weight, please look at the online reports.

** No data supplied for 2018, figure represents 2019.*

*** Diageo set a total plastic reduction target, as such data represents plastic packaging weight in metric tonnes.*

**** Baseline year for Kellogg's virgin reduction target is for 2021. As such, there is no progress on this target to display.*

ABOUT THIS REPORT

This document is the fourth in a series of annual Global Commitment progress reports. It provides insight into the trajectory of progress being made by leading businesses and governments towards creating a circular economy for plastics.

REPORTING SIGNATORIES

In this report, 130 businesses that produce, use, and recycle large volumes of plastic packaging (representing 96% of the business signatories eligible to report through the Ellen MacArthur Foundation) and 17 governments across five continents (out of 20 government signatories eligible to report) have reported on progress against public targets to help build a circular economy for plastics.[3,4]

They have all been asked to report against a common set of commitments, using the same definitions with the aim of driving transparency and consistency in data sharing on plastics across a significant group of businesses and governments.

REPORTED DATA

This report and the accompanying sector insight papers should be read alongside the individual progress reports submitted by business and government signatories. These are available via an online platform which allows users to browse individual signatory data and offers a downloadable version of the full set of data. By making the data accessible in this way, we aim to maximise transparency on the progress of individual signatories and the data collected via the reporting process.

The report provides a quantitative and qualitative assessment of progress made by signatories towards their 2025 commitments and targets over the last year. Due to the timing of reporting cycles, most quantitative data provided by business signatories in this reporting cycle is for 2021 and aggregated statistics are therefore referred to throughout the report as 2021 data, with data submitted in the 2021 reporting cycle referred to as 202- data, and so on. References throughout the report to "%s of signatories" refer to the percentage of reporting signatories.

EXITING SIGNATORIES

In the last year, five businesses have left the Global Commitment signatory group. This was as a result of being unwilling to fulfil mandatory requirements for participation, which include setting quantitative targets in line with the Global Commitment framework and publicly reporting progress on them annually through the Ellen MacArthur Foundation, in line with the Global Commitment common definitions and guidelines.

THESE BUSINESSES ARE:

Packaging producers:
Huidu environmental protection technology (Shanghai) co., LTD.

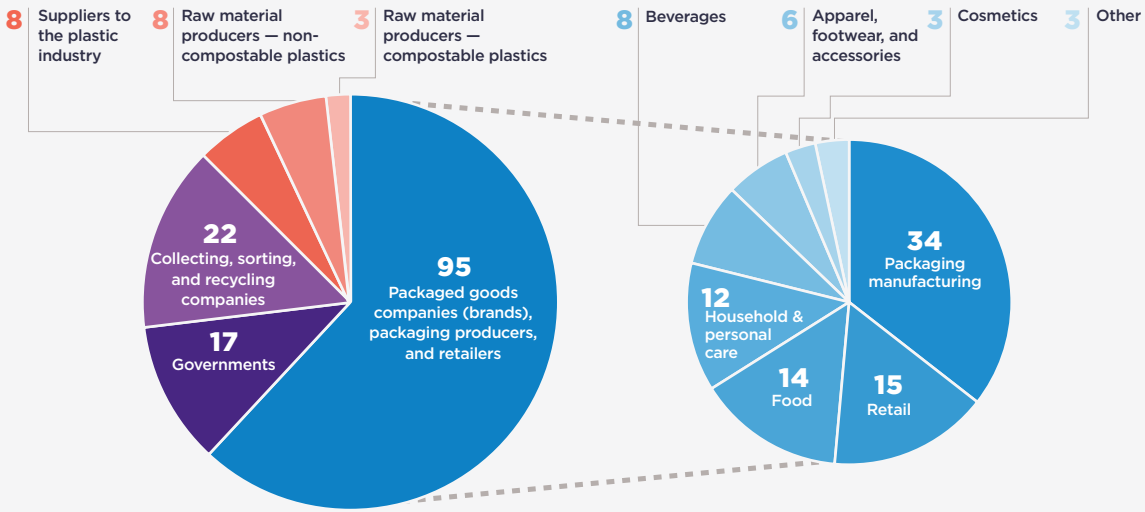
Brands and retailers:
METRO AG, Selfridges, and Stanley Black & Decker

Collection, sorting, and recycling companies:
CarbonLITE recycling

FIGURE 8

130 businesses* across the plastics value chain and 17 governments reported on progress against 2025 commitments

Breakdown of reporting signatories, by commitment category



*Some signatories have committed in two different categories. As a result, the sum of signatories in each pie is higher than 130 businesses.

EXPLORE THE DATA

PROGRESS AREAS

Understand trends across the whole signatory group in this report

- Elimination
- Reuse
- Reusable, recyclable, or compostable
- Reuse, recycling, or composting in practice
- Decoupling
- Transparency

This analysis looks across all sectors and elements of the plastics value chain, businesses and governments, to explore what progress we are seeing for the group as a whole.

SECTORS AND GOVERNMENTS

Read our series of insight papers focused on different sectors

Consumer packaged goods sectors:

- Apparel
- Beverages
- Cosmetics
- Food
- Household and personal care
- Retail

Access all sector reports here *To be published on Nov 16th*

- Governments

Access here

These deep dives will be useful for anyone looking for benchmarks and examples of governments and businesses' best practice.

INDIVIDUAL ORGANISATIONS

See the progress of each individual Global Commitment signatory via the online data platform

- Plastics producers
- Packaging producers and users
- After-use companies
- Suppliers to the plastic packaging industry
- Governments

Access here

Access the individual progress reports submitted by the signatories whose data is used in this report, sort and filter by key metrics in summary tables, or download the full data set.

LOOKING FOR RESOURCES TO SUPPORT YOU WITH DRIVING CHANGE IN YOUR ORGANISATION?

Access our Upstream Innovation Guide and workshop resources.

1 ELIMINATION

WHY ELIMINATION?

Elimination of problematic or unnecessary plastic packaging through redesign, innovation, and new delivery models is a priority. The demand for plastic packaging is set to double over the coming two decades and it will be impossible to keep this increased flow of plastics in the economy and out of the environment without elimination. To achieve a circular economy, we need to curb the growth in the total amount of material that needs to be circulated. While plastics bring many benefits, there are some problematic items on the market that need to be eliminated to achieve a circular economy, and sometimes plastic packaging can be avoided altogether while maintaining utility. Elimination is about more than bans on straws and plastic bags — it is a broad innovation opportunity. More information about eliminating plastic packaging, including inspiring case studies and actionable frameworks for approaching packaging design decisions, can be found in the Ellen MacArthur Foundation's Upstream Innovation Guide.

KEY INSIGHTS

TRENDS

Elimination efforts by signatories have increased compared to last year. Current efforts are mainly focused on material changes, such as lightweighting and packaging redesign, as opposed to direct elimination of single-use packaging.

ACTIONS

The continued growth in total packaging weight for most signatories reinforces the need to step up efforts on designing out single-use packaging in the first place. While material substitution and design for recyclability are part of the solution, curbing the overall growth of packaging use is crucial to address packaging waste and pollution. This will require a fundamental rethink of not just packaging but also products and business models.

POLICY

While government signatories continue to implement legal measures such as bans and restrictions to eliminate problematic and unnecessary plastic packaging/products, an increasing number are adopting a more holistic approach, promoting innovation in packaging, product design, or business models to drive elimination.

Solid shampoo, L'Occitane en Provence

TRENDS

Elimination efforts by signatories have increased compared to last year. Current efforts are mainly focused on material changes, such as lightweighting and packaging redesign, as opposed to direct elimination of single-use packaging.

Overall, the number of elimination actions taken by signatories has increased, with 380 examples of plastic packaging being eliminated or reduced in 2021 compared to 322 in 2020.[5] Signatories' elimination efforts have focused on average on three to four plastic packaging materials, format, or components, with 30% of signatories going beyond five.

Elimination efforts mostly focused on specific materials/additives to improve the recyclability of their packaging, representing 54% of examples submitted by signatories. This includes PS, PVC, PVDC, undetectable carbon black, multilayer materials, and EPS. At least 44% of signatories who reported having these categories in their portfolio indicated plans to reduce or eliminate them (see figure 9).

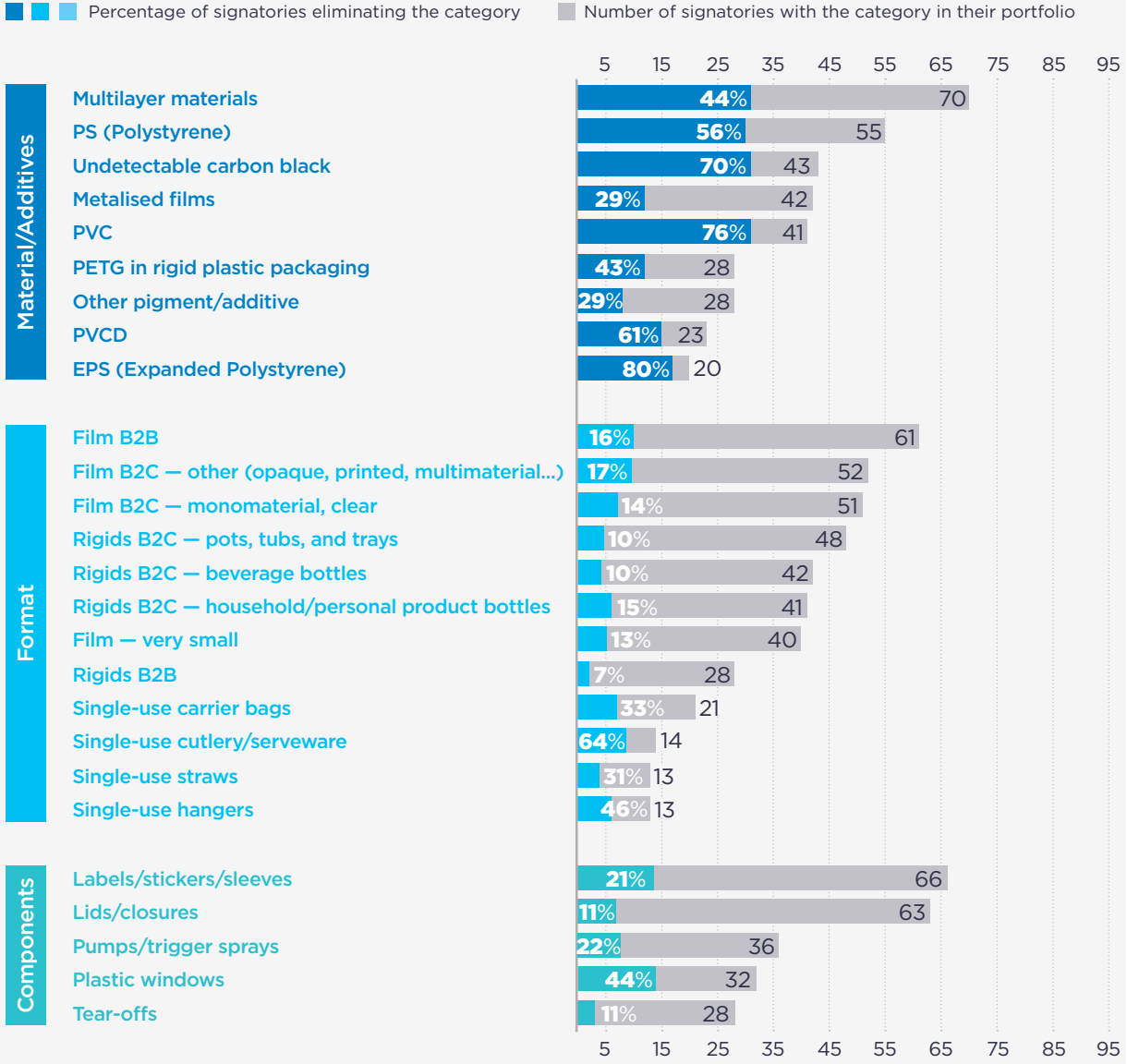
Within this category, EPS is the material with the highest degree of planned elimination or reduction reported by signatories (80%). In terms of absolute tonnage eliminated, multilayer materials are the packaging reported as being eliminated the most in 2021, with a reduction of more than 46,000 metric tonnes. This was mostly driven by plastic packaging producers such as **Logoplaste**, who moved 72% (27,000 metric tonnes) of their multilayer PET bottles to monolayer PET bottles and **Klöckner Pentaplast**, who replaced 16,000 metric tonnes of multilayer material with monolayer in 2021. Other materials with significant rates of reported elimination include PVC, with around 20,000 metric tonnes being eliminated mostly driven by **Klöckner Pentaplast** and **Danone**, and PS, with around 9,000 metric tonnes being eliminated, mostly driven by **Berry Global**, **Ferrero**, and **Mondelez International**.

Efforts to eliminate or reduce specific packaging formats were, however, less common. Only 13% of signatories with very small format flexibles in their portfolio (e.g. single-portion sachets) indicated targeted elimination efforts. Similar results can be seen in the example of bottles: only 10% of signatories with beverage bottles in their portfolio are planning to reduce their amount, although this is slightly higher for household and personal care product bottles (15%).

FIGURE 9

Current elimination efforts focus on materials/additives over formats and components

Number of packaging producers, brand, and retail signatories eliminating/reducing each category, and number of signatories with the category in their portfolio



Number of brand, retail, and packaging producer signatories = 95

↗ ACTION

The continued growth in total packaging weight for most signatories reinforces the need to step up efforts on designing out single-use packaging in the first place. While material substitution and design for recyclability are part of the solution, curbing the overall growth of packaging use is crucial to address packaging waste and pollution. This will require a fundamental rethink of not just packaging but also products and business models.

1 Carefully assess material substitution and ensure this is part of a broader packaging strategy.

A significant share of elimination examples reported are delivered through material substitution, often to paper or to another plastic type. These efforts can be helpful to move away from non-recyclable to more recyclable packaging. At the same time, substitution replaces one single-use packaging with another, and often does not significantly reduce the need for virgin materials. Substitution should therefore be done carefully and as part of a broader strategy to reduce packaging waste that also includes efforts to design out the need for single-use packaging in the first place.

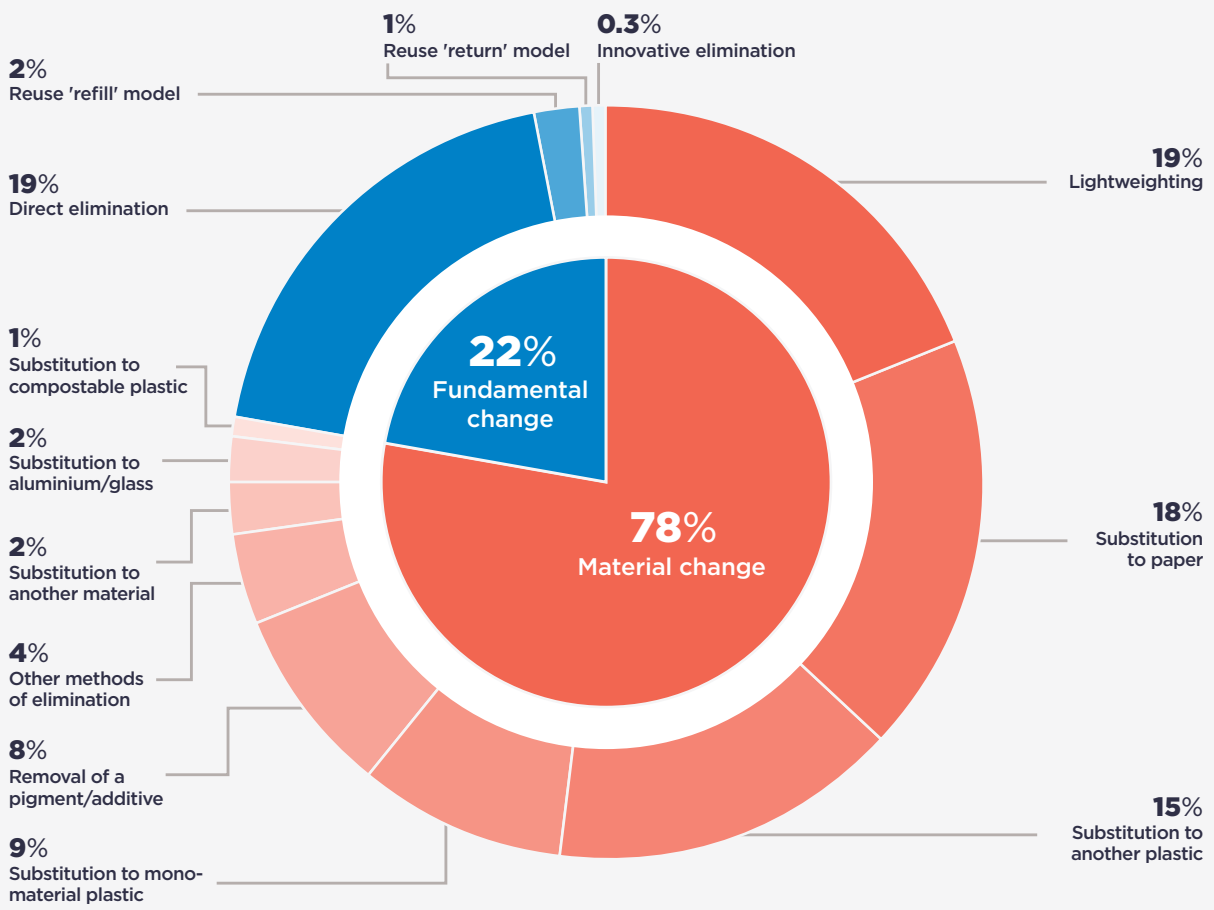
The material substitution from fossil-based plastics to paper, similarly to last year, represented around 18% of signatories' (see figure 10) reported elimination examples. Shifting from these non-renewable sources to renewable paper can, in some cases, help increase the recyclability of packaging. However, as global consumption of virgin wood pulp has already reached planetary limits, businesses should proceed very carefully to avoid placing additional pressure on fragile ecosystems.

For more information see the Paper flexible packaging deepdive

FIGURE 10

Elimination efforts are mainly delivered through material, rather than fundamental change

Elimination methods used by brand, retail, and packaging producer signatories, as a % of the total number of elimination examples reported



Notes:
Fundamental changes to packaging, product, or business model design include:

- Direct elimination: direct removal of a packaging that does not serve an essential function.
- Innovative elimination: innovative elimination of a packaging that does serve an essential function, with the function being achieved in a different way.
- Reuse 'refill' model: packaging that is owned and refilled by the user.
- Reuse 'return' model: packaging and 'packaging ownership' that are returned to a business.

Material changes include changes to packaging materials used such as substitution to paper, other plastics, or lightweighting.
More information on different types of elimination methods and examples are available in the Ellen MacArthur Foundation's Upstream Innovation Guide

2 Increase the focus on fundamental change to the packaging, product, or business model to reduce total plastic packaging use.

Most brand and retail signatories (60%) increased the weight of plastic packaging put on the market between 2018 and 2021. For many of them (66%) this growth has outpaced progress made on increasing the use of recycled content, leading to an increase in virgin plastic use (more info in chapter 5). This reinforces the need for signatories to broaden their elimination approach beyond substituting the most commonly identified problematic and unnecessary items such as PS, PVC, EPS, or undetectable carbon black. Efforts that fundamentally rethink packaging, products, or business models and reduce the total plastic packaging use should be stepped up.

Direct elimination — whereby single-use packaging that does not serve an essential function is completely eliminated or removed — composed 19% of elimination activities in 2021. Most of these involved the removal of single-use cutlery or components such as lids and straws, though there were also examples where flexible packaging such as stretch wraps used in B2B contexts, multi-buy films for cans, or PET trays had been removed. Examples include **Ahold Delhaize**, which removed several plastic formats or components, such as the multi-buy flexible plastic packaging for concentrated tomato cans and lids on dairy products, and **Mars, Incorporated**, which removed the inner trays of its chocolate multipack eliminating 130 metric tonnes of packaging.

Beyond direct elimination, there were a limited number of examples of 'innovative elimination' whereby single-use packaging that does serve an essential function is eliminated by redesigning the product itself or the business model, as well as a few examples of reuse models being implemented. 'Innovative elimination' represented 0.3% of the examples, including **Ahold Delhaize**'s planned introduction of dry misting technology to remove the need for flexible packaging around fruits and vegetables in its Romanian stores, Mega Image. Switching to a reuse model also enables elimination, as seen in 3% of examples including **H&M Group**, who eliminated 1,587 metric tonnes of single-use plastic by implementing a reusable system for hangers (for more information on reuse, see chapter 2).

Such efforts are a good first step. However, at the moment they remain limited to a few products and are therefore outpaced by the growth in total plastic packaging use. A significant increase in efforts to reduce the need for single-use packaging will be required to curb this growth (more info in chapter 5).

Read more insights on elimination and find leading examples of elimination activities from signatories in our series of sector-based insight papers.

More information on solutions to deliver elimination can be found in the Upstream Innovation Guide.

POLICY

While government signatories continue to implement legal measures such as bans and restrictions to eliminate problematic and unnecessary plastic packaging/products, an increasing number are adopting a more holistic approach, promoting innovation in packaging, product design, or business models to drive elimination.

In 2021, 53% of the policy actions taken by government signatories to eliminate problematic or unnecessary plastic packaging and/or products related to the establishment or revision of legal measures. Similar to last year, most of these efforts focused on specific categories including single-use plastic straws, cutlery or tableware, bottles, and cotton buds. For example:

- **Peru** banned single-use plastic bags, containers, and cups for food and beverages made of EPS as well as non-recyclable plastic tableware and table utensils.
- **New Zealand** approved bans on several hard-to-recycle plastic packaging including drink stirrers, cotton buds, plastics with pro-degradants, PVC preformed trays and containers, PS takeaway and EPS food and beverage packaging. Further bans are planned for 2023, which will include plastic produce bags, straws, produce labels, and tableware.
- In **Scotland**, the Environmental Protection Regulations came into force in June 2022 banning the manufacture and supply, in the course of a business, of several single-use items including EPS beverage and food containers, EPS beverage cups, beverage stirrers, plastic cutlery, and single-use plastic plates. It also bans the supply of single-use plastic balloon sticks and plastic straws.

An increasing number of governments are targeting elimination in other categories of plastic packaging beyond those most commonly identified as problematic. For example, France banned the use of primary packaging for fresh fruits and vegetables (in lots weighing less than 1.5kg). In addition, some governments are taking a more holistic approach, promoting innovation in packaging, product design (29%) or business models (41%) to drive elimination. **Peru**, for example, is signing Clean Production Agreements (CPAs) with the private sector to incentivise businesses to eliminate problematic or unnecessary plastic packaging and to promote innovation in packaging or product design. Meanwhile, **New Zealand** has developed plastic innovation and investment priorities to inform research and guide investment, and **The Netherlands** is co-funding the programme 'CIRCO' that activates entrepreneurs and creative professionals to (re)design products, services, and business models. Other leading governments are setting reduction targets (see below) and 47% of governments reported that they are also intending to use EPR regulations as a way of driving elimination of problematic or unnecessary plastic packaging and products.

Finally, public procurement was leveraged by a number of governments (41%) to drive elimination of problematic or unnecessary plastic packaging and products. For example, the **City of Copenhagen** together with the City of Gladsaxe have been developing common criteria for circular plastic packaging in public procurement, covering national and municipal activities in the Capital Region of Denmark, with priority given to reduction and reuse models.

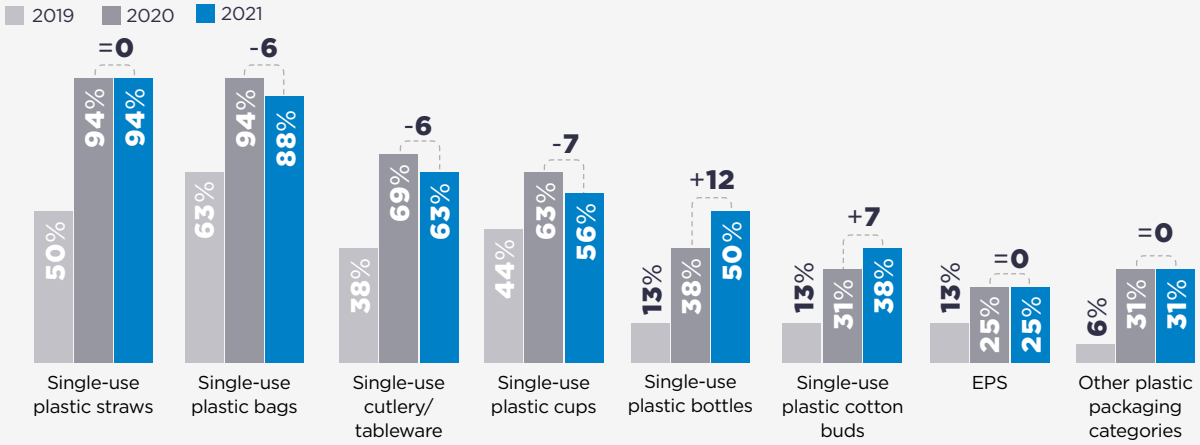
Looking forward, in addition to efforts on regulation and public procurement, more than half of the government signatories (53%) are considering the establishment or revision of EPR schemes to eliminate problematic and unnecessary plastic/products. 35% have also set quantitative targets to drive their efforts:

- **Portugal** aims for an 80% reduction in consumption of cups and food containers by the end of 2026, and for a 90% reduction by the end of 2030 compared to 2022.
- The **State of Mexico** aims to implement municipal ordinances in the 125 municipalities of the territory of the State of Mexico by 2025 to prohibit, disuse, or replace single-use plastics.
- **The Netherlands** has a target to reduce single-use packaging and products by 20% by 2025 as part of the Plastics Pact NL.
- **France** has set out plans to reduce single-use plastic packaging by 20% by 2025 through its "3R" (Reduce, Reuse, Recycle) decree. This decree also includes complete elimination of unnecessary single-use plastic packaging by the end of 2025 (defined as packaging that does not have an essential technical function, such as product protection, health and integrity function, transport, or regulatory information support). In addition, through its law against waste for a circular economy ("AGEC law"), the country is also requesting that EPR organisations set objectives to reduce packaging placed on the market, in particular single-use plastic packaging.

FIGURE 11

Government signatories' actions to eliminate problematic and unnecessary plastic packaging/products

Percentage of government signatories' elimination efforts by category, 2019–2021



2 REUSE

WHY REUSE?

The shift away from single-use towards reusable packaging is a critical part of eliminating plastic pollution. While improving recycling is crucial, we cannot recycle our way out of the plastic issues we currently face. Wherever relevant, reuse business models should be explored as a preferred option, reducing the need for single-use plastic packaging. To learn more about the four key business models for reuse, the major business benefits of reuse, and examples of reuse in action, see the Ellen MacArthur Foundation's Upstream Innovation Guide. UNEP's review of Life Cycle Assessment studies comparing single-use plastic products and their alternatives can be found here.

KEY INSIGHTS

TRENDS

The first quantitative reuse targets were announced by a few major brands this year. More broadly, however, both progress and ambition on reuse are still lacking as demonstrated by the low - and slightly decreasing - share of reusable plastic packaging.

ACTIONS

Every brand and retailer needs to develop and execute an ambitious reuse strategy with credible action plans that can lead to reuse models being deployed at scale. This will require collaboration and sharing of learnings with peers, as well as engagement with policymakers to create the right enabling conditions.

POLICY

Government signatories encourage the implementation and uptake of reuse models through reuse pilots, bans on single-use packaging, and minimum requirements for reuse solutions. Leading governments have also set quantitative targets to encourage the scaling up of reuse models. Action from governments on reuse is crucial to level the playing field, unlock current barriers to reuse solutions, and accelerate progress on reuse.

Refill station for cleaning products (refill on the go), Sonae MC

TRENDS

The first quantitative reuse targets were announced by a few major brands this year. More broadly, however, both progress and ambition on reuse are still lacking as demonstrated by the low and - slightly decreasing - share of reusable plastic packaging.

2021 saw the introduction of the first quantitative reuse targets by major brands. **The Coca-Cola Company** committed to deliver at least 25% of their volumes sold through reuse models by 2030, and **PepsiCo** announced it will set a quantitative reuse target by the end of 2022.

Overall, however, both progress and ambition on reuse remain limited. For the second consecutive year, brands and retailers reported a slight decline in the proportion of plastic packaging that is reusable, falling from 1.5% in 2019, to 1.3% in 2020, to 1.2% in 2021 (see figure 12).[6]

While 5% have increased their share of reusable plastic packaging by more than 3 percentage points, for the vast majority of packaging producers, brands, and retailers (83%) this share has not increased in 2021. Most reported either no change or a decrease between 2020 and 2021 (see figure 13). In addition, more than half of the signatories have no reusable plastic packaging at all.

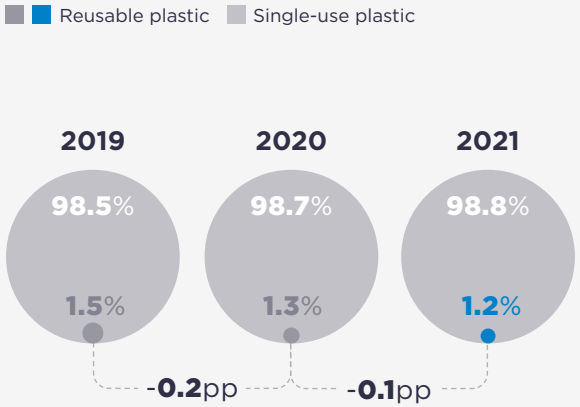
More reuse pilots were being launched in 2021 compared to 2020, especially in the retail and beverage sectors for which, respectively, 48 and 12 pilots were launched in 2021 compared to 22 and 5 in 2020. Signatories broadened the type of reuse models implemented, specifically for return- and refill-on-the-go models (e.g. refill stations) and refill-at-home models (e.g. concentrated refill pods or tablets for cleaning products). However, the expansion in these reuse models is concentrated on businesses already exploring other types of reuse models, resulting in the proportion of signatories with at least one reuse model in place remaining flat between 2020 and 2021 (see figure 14).

Lastly, fewer signatories reported plans to introduce reuse models by 2025 compared to 2020, leading to an increase in the percentage of signatories having neither actual – nor planned by 2025 – reuse models in place from 28% to 32% (see figure 14).[7]

FIGURE 12

The share of plastic packaging that is reusable has declined for a second consecutive year

Percentage of reusable plastic packaging for brand and retail signatories by total weight

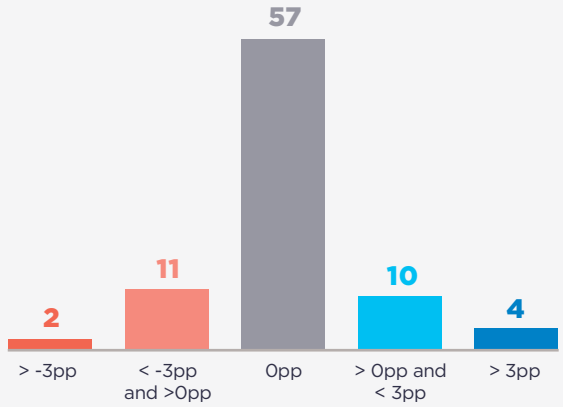


pp = percentage points

FIGURE 13

The majority of signatories report no progress on share of reusable packaging between 2020 and 2021

Distribution of change: number of packaging producer, brand, and retail signatories with reusable plastic packaging between 2020 and 2021

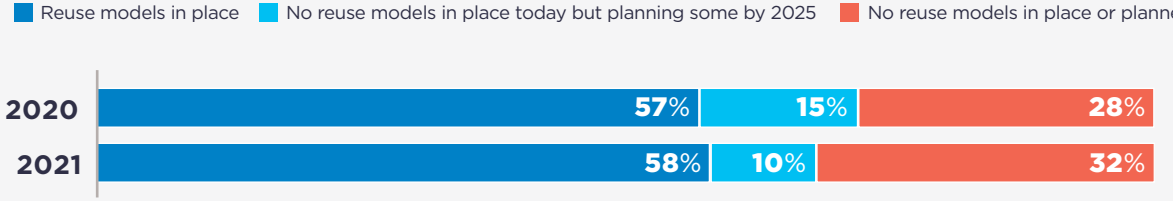


pp = percentage points

FIGURE 14

Half of signatories report existing reuse models in 2021, but planned implementation by 2025 has declined

From planning to implementation: stages of reuse engagement, as a percentage of packaging producer, brand, and retail signatories



↗ ACTION

Every brand and retailer needs to develop and execute an ambitious reuse strategy with credible action plans that can lead to reuse models being deployed at scale. This will require collaboration and sharing of learnings with peers, as well as engagement with policymakers to create the right enabling conditions.

1 Develop and execute an ambitious reuse strategy with credible action plans that can lead to reuse models being deployed at scale.

Very few brands and retailers have a true reuse strategy in place. Despite the importance of reuse in creating a circular economy for packaging, reuse pilots are often fragmented and not embedded in a business strategy that could lead to scale over time. It is crucial every brand and retailer develops and executes an ambitious reuse strategy with credible action plan that can lead to reuse models being deployed at scale and, ultimately, a meaningful reduction in the total weight and number of packaging units put on the market. Such a strategy needs to be underpinned by buy-in from senior leadership, with clear objectives, and the necessary investment of financial and human resources. We welcome the first announcements by **The Coca-Cola Company** and **PepsiCo** to set a quantitative reuse target. We have also seen more businesses put in place reuse-specific staff. It is essential — and overdue — that many more businesses follow this lead and for all to turn these ambitions into meaningful action and progress.

2 Collaborate with other stakeholders including industry peers, reuse innovators, and policymakers.

Now that signatories have obtained learnings from their reuse pilots and models, it is paramount that businesses across and within sectors work together on sharing these learnings, as called out by signatories such as **Mondelez International** and **Unilever**, and develop an integrated approach to reuse. While some reuse models can be introduced by individual businesses, others would significantly benefit from cross-industry collaboration. For example, a shared infrastructure for distribution, cleaning, and logistics of reusable packaging across businesses enables the reduction of costs through economies of scale and decreased emissions. Collaborating with policymakers to create the enabling conditions for reuse can also accelerate progress: by setting industry-wide reuse targets and mandates, by introducing hygiene and packaging design standards, or by developing financial incentives that benefit the scaling of reuse models over single-use packaging solutions.

Inspiration, examples, frameworks, best practices, and tools to support businesses in developing and executing reuse strategies and action plans can be found in the Upstream Innovation Guide and in Reuse – Rethinking Packaging. These also lay out several business benefits that can be achieved through reuse business models:

- Individual needs can be accommodated by reuse models that let users mix and match flavours, personalise packaging, or choose desired quantities.
- Packaging and transportation costs can be reduced by supplying refills for reusable containers in compact form, such as tablets.
- Brand loyalty and customer retention can be achieved through deposit and reward schemes for reusable packaging.
- User experience can be improved by enhancing the look, feel, or functionality of reusable packaging (which can be more high-end as its initial production cost is divided over many uses).
- Information on user preferences and system performance can be gathered by incorporating digital technologies such as RFID tags, sensors, and GPS tracking into the reusable packaging system.

Read more insights on reuse and find leading examples of reuse activities from signatories in our series of sector-based insight papers.

Refillable hand soap (refill at home), Beiersdorf AG

POLICY

Government signatories encourage the implementation and uptake of reuse models through reuse pilots, bans on single-use packaging, and minimum requirements for reuse solutions. Leading governments have also set quantitative targets to encourage the scaling up of reuse models. Action from governments on reuse is crucial to level the playing field, unlock current barriers to reuse solutions, and accelerate progress on reuse.

There are various reuse models that can be scaled without regulatory interventions. Yet policy interventions can accelerate this and can unlock barriers to reuse models, particularly where industry-wide shared infrastructure or collaboration is required, or a more level playing field is needed. In 2021, an increasing number of governments reported the piloting or scaling up of reuse solutions to be a key measure used to drive progress: 44% in 2021 compared to 38% in 2020, and 6% in 2019. Other commonly used measures include the promotion of collaboration with the private sector (47%), and delivery of awareness-raising and education campaigns (29%).

Notable new examples of progress or planned actions on reuse by governments reported this year include:

- **Chile** approved a bill to limit the use of a number of single-use products (such as cutlery, mixers, straws, food packaging, trays, and sachets) in restaurants, coffee shops, hotels, bars, and other similar establishments that sell prepared food. For on-site consumption, it bans the delivery of any single-use packaging/products of any material and mandates the use of reusable products.
- **Austin** recently relaunched a new platform for the Austin Reuse Directory, which helps locals find where to donate, resell, buy responsibly, rent, and repair items, while supporting the local reuse economy. The city is looking to add a 'refill' option to the Austin Reuse Directory to allow residents to locate businesses that can help them reduce unnecessary plastic.
- In the **United Kingdom**, the Welsh Government provided grant funding to the organisation City to Sea to support their refill initiative in Wales. There are currently 2,172 refill stations and 65 refill schemes operating across Wales. In **Northern Ireland**, reuse is being promoted through requirements in public contracts.
- In **Portugal**, from January 2024, establishments using plastics for the supply of ready-to-eat meals, on a ready-to-eat basis, or with home delivery, will be obliged to make reusable alternatives available to their customers, with fees attached to the packaging to foster reuse rates.
- In **France**, in the context of the French recovery plan, public financing has been made available for projects contributing to the 'reduction, reuse, and substitution of single-use packaging'.

Looking at future plans to encourage reuse, government signatories are mainly planning to promote collaboration with the private sector and civil society organisations (59% of the signatories), pilot or scale up reuse solutions/systems (41%), and establish or revise Extended Producer Responsibility schemes (24%). Five government signatories (29%) have also set quantitative targets to encourage reuse models.

For example:

- In **Portugal**, businesses across a number of sector activities (industry, commerce, distribution, and catering) will be required to set reuse targets by the end of 2022. These targets should specify a minimum percentage of volume of beverages placed on the market in reusable packaging by 2025 and 2030. In the absence of self-adopted targets, the following targets will apply: at least 20% by January 2025 and at least 50% by January 2030 of the annual volume of beverages placed on the market to be delivered through reusable packaging.
- **France** has specified that at least 50% of its objective to decrease single-use plastic packaging by 20% by 2025 must be obtained through packaging reuse (including bulk sale, refills, and deposit return schemes).

3 REUSABLE, RECYCLABLE, OR COMPOSTABLE

WHY DESIGN FOR REUSE, RECYCLING, OR COMPOSTING?

In a circular economy, every unit of packaging should be recyclable or compostable and, where possible, also reusable. Achieving this requires a combination of redesign and innovation in business models, materials, packaging design, and reprocessing technologies. Designing packaging to be reusable, recyclable, or compostable is a crucial first step towards ensuring it is effectively reused, recycled, or composted in practice , but this does not necessarily mean these packaging types are also recycled in practice today (the focus of Chapter 4).

KEY INSIGHTS

TRENDS

The 2025 target of 100% reusable, recyclable, or compostable plastic packaging will almost certainly be missed by most organisations, with flexible packaging and lack of infrastructure being the main barriers.

ACTIONS

Reaching the 100% reusability, recyclability, or compostability target will require actions in three areas, on top of the important elimination and reuse actions that were laid out in previous chapters:

- **Technical recyclability:** Shifting to technically recyclable packaging designs can result in a 4 percentage point direct progress towards the 2025 target and be a crucial step to unlock bigger leaps in progress by enabling entire packaging categories to cross the thresholds to become recyclable in practice and at scale.
- **Flexible plastic packaging:** It is increasingly unlikely that flexible consumer packaging will be recyclable in practice and at scale by 2025 and, as a result, it is increasingly likely that many signatories will miss this target. A bold, new approach — far beyond anything we have seen before — is urgently needed to address the fast-growing issue of flexible packaging waste.
- **Rigid plastic packaging:** For rigid plastic packaging types that are not recyclable in practice and at scale today, businesses should continue to eliminate those that they believe are unlikely to be recycled in practice and at scale, and support the acceleration of collection, sorting, and recycling infrastructure development for the others.

POLICY

Governments can accelerate the progress on the 100% reusability, recyclability, and compostability target by imposing mandatory design requirements — such as all plastic packaging being put on the market to be recyclable, reusable, or compostable — or by incentivising the use of reusable, recyclable, or compostable plastic packaging. To date, six governments have set such targets. By enabling and driving the improvement of collection, sorting, and recycling infrastructure, governments can also help prove universal packaging recyclability in practice and at scale.

Mono material (PP) pump and bottle, L'Occitane en Provence

TRENDS

The 2025 target of 100% reusable, recyclable, or compostable plastic packaging will almost certainly be missed by most organisations, with flexible packaging and lack of infrastructure being the main barriers.

Similarly to previous years, the share of signatories' plastic packaging that is reusable, recyclable, or compostable (RRC) has increased incrementally (+ 1.7pp) in 2021.[8] Brand and retail signatories reported that 65.4% of their plastic packaging was reusable, recyclable, or compostable, with the vast majority being recyclable (65.0%), a minor share reusable (1.2%), and a very small amount compostable (0.002%) (see figure 15[9]). As reuse was covered in chapter 2, and compostable packaging is only a very minor part of the signatories' portfolio, this chapter will mainly focus on recyclability.

In the Global Commitment, recyclability is achieved only when proven in practice and at scale. As such, progress towards this target is expected to be incremental, with big leaps forward only when entire packaging categories cross the thresholds to become recyclable in practice and at scale: a 30% recycling rate in regions that collectively have over 400 million inhabitants (for more information about how recyclability is assessed in the Global Commitment see page 29). Categories that currently do not meet these thresholds include all business-to-consumer flexible packaging (16% of signatories' portfolios) and rigid packaging types such as rigid PP packaging other than bottles (6.2%), PET thermoforms (3.0%), and uncommon packaging materials such as PVC, PS, and EPS (2.0%).[10]

Businesses are planning and making major investments in packaging design so it is technically recyclable. For example, **Mars, Incorporated** reported to invest USD hundreds of millions to redesign over 8,000 packaging components to make them technically recyclable or compostable, and has ensured the remuneration of their top 300 executives are linked to delivering on their 'design for recycling' target. Across all brands and retailers that reported on this optional metric, 82% of plastic packaging is technically recyclable (see figure 16). Those that reported on it for the second year in a row (a small proportion of the total), have shown a 5 percentage point increase from 62% to 67%. Technical recyclability means that the technology exists to recycle these packaging types, but does not necessarily mean they are also recycled in practice and at scale today.

While technical recyclability can be a crucial step towards recyclability in practice and at scale, the former is not a guarantee that the latter will be achieved. For some packaging categories in some geographies — such as rigid PP and PET thermoform packaging — designing technically recyclable plastic packaging is a crucial step to facilitate the scaling of the necessary infrastructure to collect, sort, and recycle these packages in practice. In other instances, e.g. flexible packaging in emerging economies, there is much more uncertainty around whether a system for recycling will be in place and in what timeframe, even if the packaging were to be technically recyclable. While working towards technical recyclability as a potential enabler to recycle these in practice and at scale can be part of the solution, in these cases it is crucial to also invest heavily in innovating away from these packaging types.

FIGURE 15

Progress on recyclability has driven a slight increase in share of reusable, recyclable, or compostable (RRC) plastic packaging

Percentage of reusable, recyclable, or compostable plastic packaging for brand and retail signatories in total weight reporting in 2019, 2020, and 2021 (% of weight)

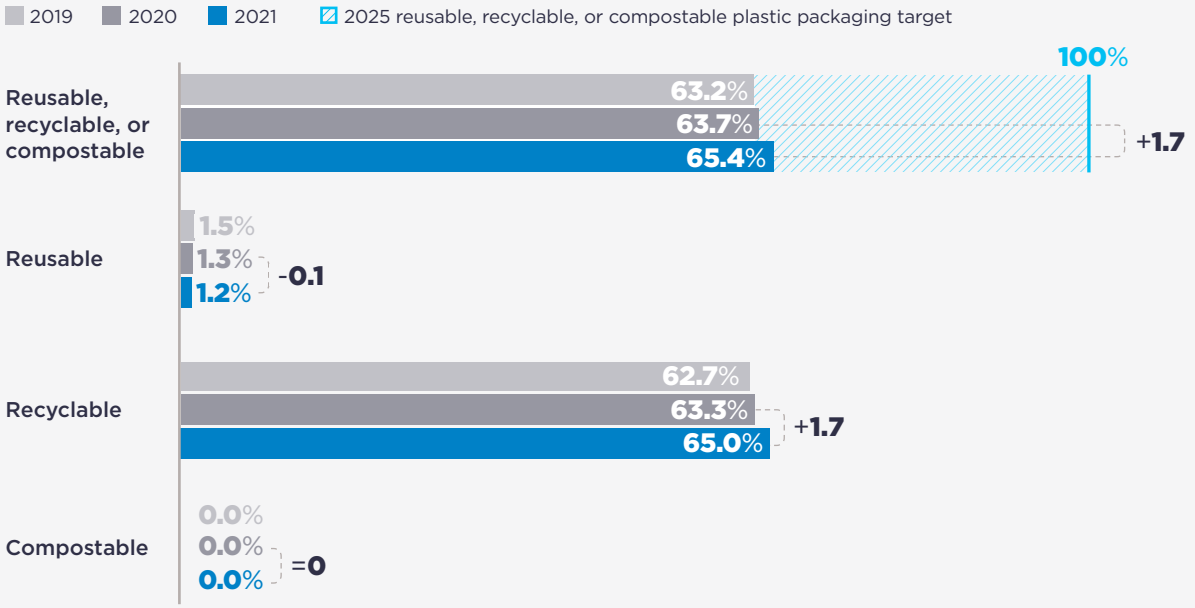
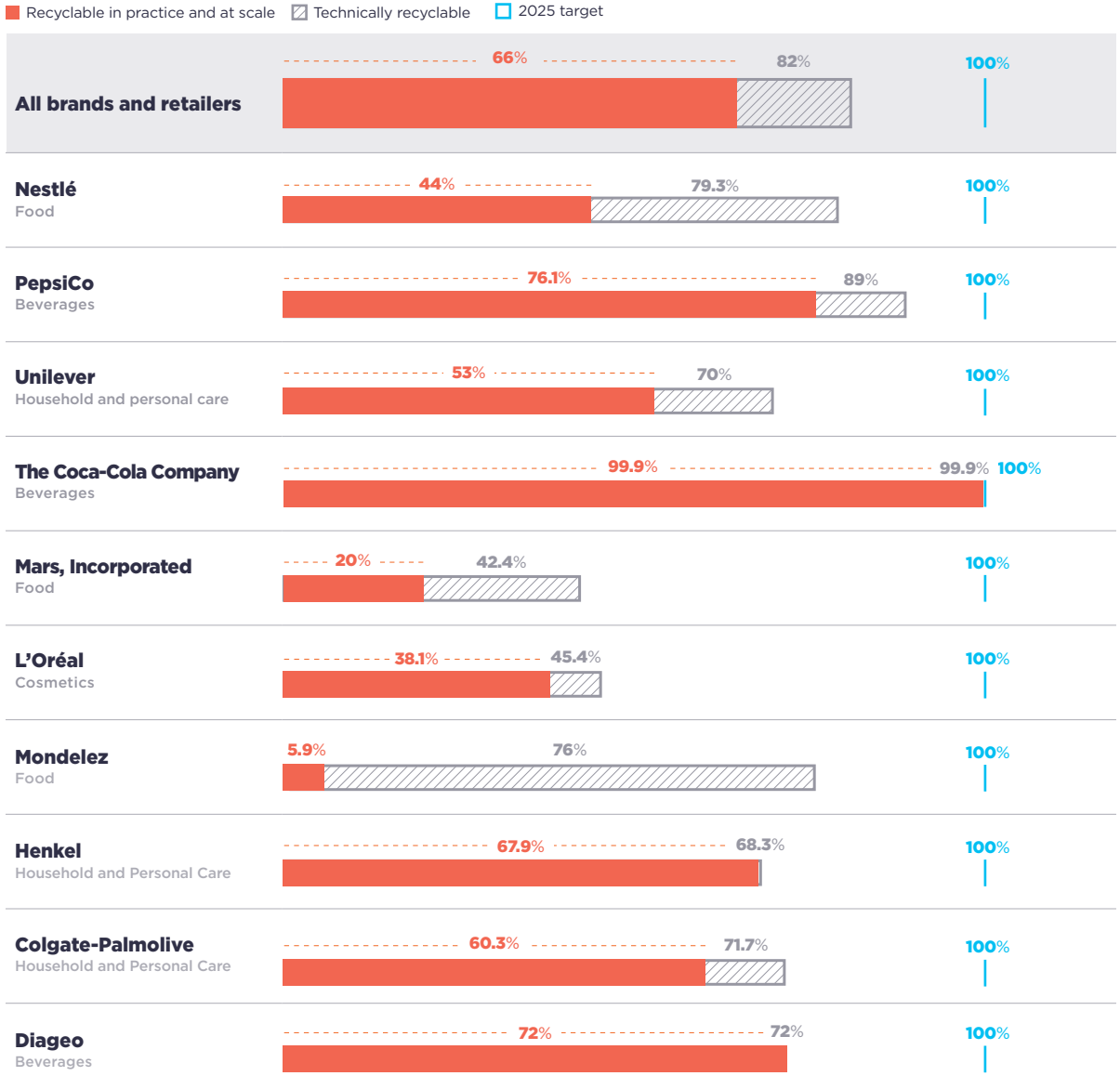


FIGURE 16

Signatories are investing to improve the technical recyclability of their packaging but this does not necessarily mean that infrastructure exists in practice and at scale* to recycle such packaging and therefore does not always result in an increase towards the 100% target

Share of brand and retail signatories' total packaging weight which is recyclable in practice and at scale vs technically recyclable)*



* For more information on assessment of recyclability in practice and at scale, please see page 29

↗ ACTION

Reaching the 100% reusability, recyclability, or compostability target will require actions in three areas (see figure 17), on top of the important elimination and reuse actions that were laid out in previous chapters.

1 Technical recyclability

Shifting to technically recyclable packaging designs can result in a 4 percentage point direct progress towards the 2025 target and be a crucial step to unlock bigger leaps in progress by enabling entire packaging categories to cross the thresholds to become recyclable in practice and at scale.

At present, 4% of signatories' plastic packaging are of a packaging type that is recycled in practice and at scale, but are not designed in a way that is technically recyclable. For example, this includes PET bottles for which the types of labels, pigments, caps, and trigger pumps used hinder recyclability. Design changes to these specific packages are the most direct way for signatories to add up to another 4 percentage point of progress towards the target.

In addition, designing other packaging to be technically recyclable can be a crucial step towards recyclability in practice and at scale, and help to unlock bigger leaps in progress over time. Since technical recyclability is not a guarantee of recyclability in practice, businesses must keep in mind that some applications in some geographies will require a more fundamental rethink of the packaging type, product itself, or its delivery model (e.g. by switching to reuse models).

2 Flexible packaging[11]

It is increasingly unlikely that flexible consumer packaging will be recyclable in practice and at scale by 2025 and, as a result, it is increasingly likely that many signatories will miss this target. A bold, new approach — far beyond anything we have seen before — is urgently needed to address the fast-growing issue of flexible packaging waste.

Business-to-consumer flexible plastic packaging — e.g. sachets, wrappers, small bags — is the fastest-growing packaging category, with very low recycling rates and a disproportionate share of environmental leakage. It represents 16% of signatories' plastic packaging portfolios by weight, but up to 30-40% of the total global plastic packaging weight.

To date, we have not seen any credible industry-wide approach or action plan to address this challenging area, especially in emerging economies. Current efforts driven by leading organisations are fragmented, and will not address this issue at the scale required. Therefore, we urge businesses to collectively design and enact strategic roadmaps for single-use flexible packaging. Our recent study showed that a bold, new approach — far beyond anything we have seen before — is needed. It listed 21 urgent actions as part of the following overall strategy:

- Eliminating and innovating away from single-use flexible packaging must be the first and foremost part of any flexible packaging strategy — because as soon as single-use flexible waste is generated, regardless of material or geography, it is very hard to deal with. Current efforts are only just scratching the surface and a step-change in the level of commitment and effort in regard to direct elimination of unnecessary packaging and exploration of upstream innovation solutions, such as reuse, is required from all stakeholders.
- 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. This can include staying with a conventional plastic and scaling recycling systems, or substitution to a different material (such as paper or compostable plastics where relevant) and then scaling those systems. Either way, what is clear is that unless simultaneous, unprecedented efforts across packaging design, infrastructure, and policy are begun immediately — efforts that push far beyond the level of activity we are currently seeing — the circulation of flexible packaging in practice and at scale is unlikely to happen in the foreseeable future.
- While they are currently a necessary part of the solution, the inherent quality and yield limitations of recycling and substitution strategies mean that staying with single-use flexible packaging will always present a challenge from a circular economy perspective. This is why we need to keep driving a strong upstream innovation agenda (in line with the first part of the overarching strategy) in order to find ways to eliminate the ever-increasing amonut of single-use flexible packaging over time.

3 Rigid packaging

For rigid plastic packaging types that are not recyclable in practice and at scale today, businesses should continue to eliminate those that they believe are unlikely to be recycled in practice and at scale, and support the acceleration of collection, sorting, and recycling infrastructure development for the others.

Rigid plastic packaging categories that currently are not recyclable in practice and at scale represent 11% of signatories' portfolios. They include rigid PP packaging other than bottles (6.2%), PET thermoforms (3.0%), and rigid packaging made of PVC (0.1%), PS (1.7%) and EPS (0.2%).

Rigid packaging made of PVC, PS, and EPS are widely targeted as materials aimed to be phased out: by signatories (see chapter 1), various Plastics Pacts, and the Consumer Goods Forum's Coalition of Action on Plastics Waste alike.

FIGURE 17

Increasing the proportion of recyclable plastic packaging will require improving technical recyclability for all packaging, scaling recycling infrastructure where relevant, and moving away from flexible plastic packaging wherever possible

Share of brand and retail signatories' total packaging weight that is recyclable and not currently recyclable as a % of total packaging weight

Note: Data was extrapolated to account for signatories who did not report their portfolio breakdown to the Ellen MacArthur Foundation

* For more information on assessment of recyclability in practice and at scale, please see page 29.

For non-bottle rigid PP packaging and PET thermoforms, there appears to be more confidence from signatories that collection, sorting, and recycling infrastructure will improve and scale. Anecdotal evidence suggests investment in the upgrading or building of sorting and recycling plants for these materials is taking place. For example, Global Commitment signatory **City of Copenhagen** reported that from 2021 to 2024 they will work to ensure that at least 30% of the PET food trays collected are recycled into new food-contact materials. However, transparent data on current and expected recycling rates per packaging type is very scarce. Therefore, it is still uncertain if the thresholds for recyclability in practice and at scale will be met by 2025 for these two packaging categories.

For those packaging types, as well as those that are already recyclable in practice and at scale, we encourage all actors in the value chain — from packaging producers, brands and retailers, recyclers, governments, and others — to continue to increase global recycling rates by improving and expanding collection-for-recycling and sorting processes, scaling recycling capacity, and advocating for EPR policies. Mandatory Extended Producer Responsibility is widely recognised as the only proven way to provide the dedicated, ongoing, and sufficient funding required to make the economics of collection, sorting, and recycling of packaging work, and as such is a necessary part of the solution.

More information on solutions to make packaging reusable, recyclable, or compostable can be found in the Upstream Innovation Guide.

A breakdown of packaging reported by Global Commitment signatories and for the global market as a whole, with an indication of recyclability according to the Global Commitment definition and results of the 2022 Recycling Rate Survey, can be found in the appendix to this report.

POLICY

Governments can accelerate the progress on the 100% reusability, recyclability, and compostability target by imposing mandatory design requirements — such as all plastic packaging being put on the market to be recyclable, reusable, or compostable — or by incentivising the use of reusable, recyclable, or compostable plastic packaging. To date, six governments have set such targets. By enabling and driving the improvement of collection, sorting, and recycling infrastructure (see next chapter) governments can also help prove universal packaging recyclability in practice and at scale.

In 2021, governments incentivised reusable, recyclable, or compostable plastics packaging primarily through developing regulations, standards, or guidelines (35% of reporting signatories) and establishing EPR schemes (35%). Planned or existing labelling schemes were also reported by a number of governments, aiming to inform consumers of how to segregate and recycle plastic products/packaging. Specific examples include:

- The **City of Copenhagen** updated labelling on containers for household recyclable waste with national pictograms. Producers have also been encouraged to use the corresponding pictogram on the packaging to ease source segregation and inform citizens of its recycling potential.
- **New Zealand** is encouraging industry adoption of the Australasian Recycling Label, an on-pack label that helps consumers in **Australia** and **New Zealand** to correctly recycle their household packaging. **New Zealand** will continue drafting regulations to phase-out certain hard-to-recycle plastic packaging and single-use plastic items by 2025.
- The **United Kingdom** government announced the introduction of EPR in 2024. Utilising data reported in 2024, modulated fees based on recyclability will be introduced from 2025, to incentivise producers to use packaging and packaging materials that can be recycled. The government also hopes to implement a fully binary labelling system for recyclable and non-recyclable packaging by the end of 2026–2027.
- In **France**, public financing is available from 2021 to 2024 to support innovation for recyclability, recycling, and incorporation of recycled materials.

While these represent the main actions planned to be taken by governments to incentivise reusable, recyclable, or compostable plastics packaging, six governments have also set quantitative targets linked to their overarching commitment. These include:

- The **United Kingdom** set a target that 100% of plastic packaging will be recyclable or reusable by 2025.
- The **City of Copenhagen** aims to engage with more than 70 different businesses between 2021 and 2024 to discuss design-for-recycling and challenges for automatic sorting caused by specific colours, labels, shapes, and material compositions. During the same period, the city will make the municipal test sorting facility for plastic packaging available for a minimum of 150 businesses to be used for testing new packaging designs and new approaches to improve the automatic sorting of plastic packaging as a way of increasing quality.

Governments can also play a crucial role in accelerating the development of reuse models. For more information, see chapter 2.

HOW ARE RECYCLABILITY AND COMPOSTABILITY ASSESSED IN THE GLOBAL COMMITMENT?

The definitions used by Global Commitment signatories to assess the proportion of recyclable or compostable packaging in their portfolios are more stringent than most other definitions.

The commitment to 100% reusable, recyclable, or compostable plastic packaging by 2025 is based on definitions that ask signatories to go beyond designing packaging for the technical possibility of recycling or composting, and require that recycling or composting is proven to work 'in practice and at scale' for any given packaging design. The threshold to prove recycling or composting works 'in practice and at scale' is a 30% recycling/composting rate achieved across multiple regions, collectively representing at least 400 million inhabitants. To support reporting on recyclability, the Ellen MacArthur Foundation has for the last two years conducted a global survey of organisations with expertise on recycling rates with the aim of filling gaps in data required to provide evidence of where the threshold is being met. The results of this exercise are available here.

The 'in practice and at scale' requirement and suggested threshold result in some signatories reporting low or moderate recyclability percentages today. The threshold also means that progress towards 2025 targets can be expected to follow a 'lumpy' trajectory (e.g. if infrastructure to collect and recycle certain high-volume categories of packaging reaches the threshold scale requirement, recyclability scores would increase significantly). However, these definitions set a clear 2025 ambition level. Working towards this level of ambition and creating transparency on current recyclability percentages demonstrates the commitment of signatories to driving change at scale.

It should be noted that recyclability and compostability percentages reported as part of the Global Commitment are not comparable to assessments and claims of recyclability using different definitions or methodologies. The definitions of recyclability and compostability used in the context of the Global Commitment are designed to be applied at a global level and are not linked to any specific geographical area, local context, or regulations, or on-pack recyclability or compostability labels.

Full details of the definitions and suggested assessment methodology for Global Commitment signatories are available in the Global Commitment reporting guidelines document here.

To ensure full transparency, signatories were asked to explicitly confirm if they had strictly followed the suggested methodology. If they hadn't, they were asked to explain any deviations from the suggested methodology and provide evidence used to support this decision. All of this information is available on a business-by-business basis here.

4 REUSE, RECYCLING, OR COMPOSTING IN PRACTICE

WHY REUSE, RECYCLING, OR COMPOSTING IN PRACTICE?

Designing all packaging to be reusable, recyclable, or compostable is a necessary first step, but a circular economy is only realised if packaging is actually reused, recycled, or composted in practice. Next to circular packaging design, this requires the necessary systems to be in place to collect, sort, and effectively reuse, recycle, or compost the packaging. This section focuses on signatories' efforts and commitments to put these systems in place.

KEY INSIGHTS

TRENDS

The quantity of recycled plastics produced by signatories in the recycler and resin producers categories has increased by 19% and 11% respectively between 2020 and 2021, with recyclers focusing their investment heavily towards PET recycling.

ACTIONS

Businesses, including brands and retailers, are encouraged to accelerate collaborative efforts (e.g. by actively engaging with recyclers in Plastics Pacts) as well as driving collective investment in recycling technologies (e.g. digital watermarking) and infrastructure, particularly for packaging that is not yet recyclable in practice and at scale, such as PP pots, tubs, and trays, and PET thermoforms.

POLICY

Policymakers have a key role to play in improving the supply of recycled content on the market. This can be achieved through mandatory requirements, such as imposing a minimum of recycled content, rolling out well-designed EPR legislations, or by expanding collection of plastics and investing in recycling infrastructure.

Deposit return container, Schwarz Group

TRENDS

The quantity of recycled plastics produced by signatories in the recycler and resin producer categories has increased by 19% and 11% respectively between 2020 and 2021, with recyclers focusing their investment heavily towards PET recycling.

RECYCLERS

The quantity of plastics recycled by collecting, sorting, and recycling signatories was around 1.6 million metric tonnes in 2021, an increase of 19% compared to 2020 for signatories reporting both in 2020 and 2021.[12] This was a stronger growth than reported between 2019 and 2020 (15%), notably due to the post-pandemic recovery in plastic production.

PET remains the primary polymer recycled by the signatory group, with 77% of recyclers reporting processing PET, accounting for 44% of the total weight of recycled plastics by signatories sharing this data. PET is followed by PP (20% of total weight of recycled plastics in 2021), LDPE (18%), and HDPE (13%).[13] Notably, there was an important increase in the weight of HDPE recycled (+33% vs 2020), as well as for PET and PP (+23%).

The overall growth in recycling output was driven by a combination of expansion or increased capacity of current facilities, acquisitions of existing facilities, and the building of new facilities. Next to the progress made by pure recyclers, other signatories helped increase recycling capacity around the world. This includes those engaged in plastics production, packaging production, and retail to secure their supply of recyclates. Notable new investments in collection and recycling facilities reported this year include:

- Waste management business **Veolia** inaugurated two plants in 2021: a bottle rPET plant in Norway and a bottle rPET plant in Indonesia, which increased production capacity by 40,000 metric tonnes.
- Packaging producer **ALPLA** increased its bottle recycling output capacity to 45,000 tons (~40,823 metric tonnes) of PET from recycling plants in Germany, Italy, and Romania, and to 15,000 tons (~13,608 metric tonnes) of HDPE from their plant in Mexico.
- **PetStar** announced that its shareholders, including **The Coca Cola Company** and **Arca Continental**, will invest USD 64 million to expand Mexico's recycling infrastructure by boosting production capacity. This will involve the installation and start-up of 18 collection facilities throughout Mexico, aiming to increase collection capacity to 20,000 tons (~18,143 metric tonnes) per year by 2023. Investment also includes the expansion of the Toluca Recycling facility which will increase the post-consumer food-grade rPET production to 26,000 tons (~23,587 metric tonnes) per year by 2025.
- The recycling business **Dalmia Polypro Industries Limited** is setting up a new recycling facility with capacity of 100,000 metric tonnes per year, with a main focus on food-grade packaging, and is developing a platform to provide end-to-end traceability.
- The collection, sorting, and recycling business **Hera Group** is developing several projects, including a dashboard to monitor and enhance the quality of the plastics entering the sorting plant and an AI system analysing waste quality in the bin-emptying phase, enabling it to implement corrective actions at household and facility levels.

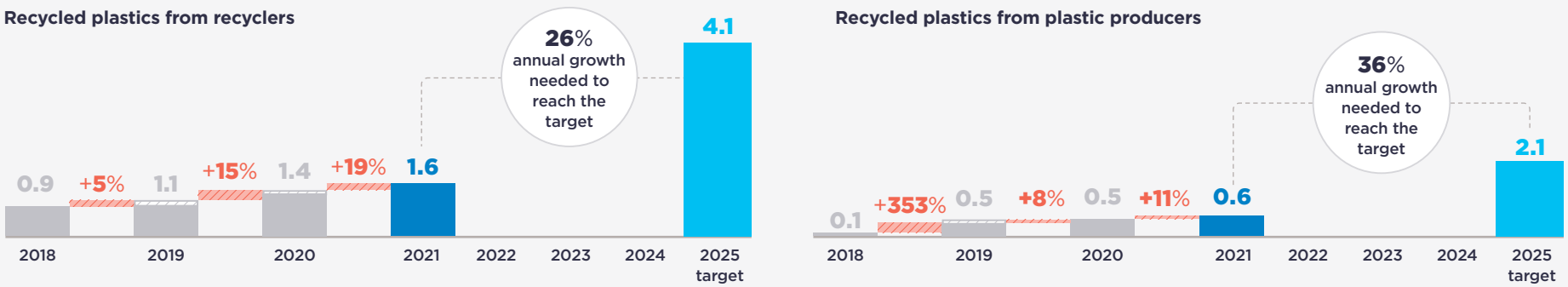
RESIN PRODUCERS

In 2021, plastic resin producer signatories reported 0.6 million metric tonnes of recycled plastics, a 11% increase compared to 2020 for signatories reporting both in 2020 and 2021 (see figure 18).[14] Despite this positive increase, recycled plastics only represented 3% of the total of plastic sold by these signatories in 2021. Achieving the target of 2.1 million metric tonnes of recycled plastics by 2025 will require a yearly growth of 36%. Given the current gap, resin producers are encouraged to urgently accelerate their progress to achieve their 2025 target.

FIGURE 18

Production of recycled plastics increased for third year in a row, but further acceleration is needed to reach 2025 targets

Weight of recycled plastics produced by recycler and plastic producer signatories, in million metric tonnes (MMT)



↗ ACTION

Businesses, including brands and retailers, are encouraged to accelerate collaborative efforts (e.g. by actively engaging with recyclers in Plastics Pacts) as well as driving collective investments in recycling technologies (e.g. digital watermarking) and infrastructure, particularly for packaging that is not yet recyclable in practice and at scale, such as PP pots, tubs, and trays, and PET thermoforms.

Businesses are strongly encouraged to collaborate with all actors in the value chain to improve the collection, sorting, and recycling systems for all the plastic packaging they put on the market. Scaling the infrastructure required for recycling plastics is necessary to ensure that all packaging is recyclable in practice and at scale. While such infrastructure exists for some packaging types — such as PET, PP, and HDPE bottles — this is not the case for other types such as PP pots, tubs, and trays, and PET thermoforms. Collaboration examples include participation in industry recycling groups, partnerships to establish or support recycling systems, or research into the recycling of specific packaging types.

The packaged goods business **Colgate-Palmolive Company** is working with Closed Loop Partners, The Recycling Partnership, and other associations to develop solutions that can increase recycling rates in the US. In Germany, the US, and Canada, **Danone** is taking part in projects to increase the recycling rates of PET thermoforms, and **Ferrero** is engaging selected suppliers using alternative recycling processes able to provide recycled PP with the same performance of standard virgin resins.

A number of signatories also shared efforts aimed at either scaling collection and recycling rates for specific polymers or packaging types. This included the 41% of signatories who reported that they have now joined one or more of the Ellen MacArthur Foundation's Plastic Pacts network.[15] In doing so, they will contribute towards driving progress on the Pacts' targets to increase recycling rates in their area. Some multinational signatories are investing significantly in Pact efforts by joining multiple pacts, including: **Veolia**, **Danone**, **Unilever**, **Schwarz Group**, **Mars, Incorporated**, **The Coca-Cola Company**, **Colgate-Palmolive Company**, and **Nestlé**.

In addition, more investments are needed at every stage of the recycling process — particularly the collection and sorting stages — in order to increase recycling rates, which would contribute to growing the supply of recycled plastics. To date, much of the investment focus has been on developing robust end-markets to drive improvements in recycling infrastructure.

For collection, there are a few notable examples. The product stewardship and recycling management corporation, **Encorp Pacific (Canada)** continued to expand its Return-It Express programme to an additional five locations across British Columbia (BC), on top of an increase of 13 locations in 2020. The stations have longer drop-off hours and a small size, which enable them to be placed in high-density urban areas or in hard-to-service rural areas, where siting a traditional depot is challenging. Their target is to recycle 80% of empty beverage containers sold into the province by 2025. In 2021, they captured 38.7 million plastic beverage containers for recycling through Return-It Express. Their overall recovery rate for plastics in 2021 was 72.7% — 2.4% higher than in 2020.

For sorting, the support from brand, retailer, and packaging producer signatories to explore digital watermarking technology continues, specifically regarding HolyGrail 2.0 with 10 signatories in total mentioning it in their progress reporting. HolyGrail 2.0 — a follow-up from project HolyGrail that emerged as part of the Ellen MacArthur Foundation's Plastics initiative — now involves more than 130 partners and has passed its national market test, with signatories such as **Schwarz Group** participating in Germany, France, and Denmark.

POLICY

Policy makers have a key role to play in establishing or improving collection, sorting, and recycling systems. This can be achieved through mandatory requirements, such as imposing a minimum of recycled content, rolling out well-designed EPR legislations, or by expanding collection-for-recycling to more packaging types and investing in recycling infrastructure.

In 2021, 59% of governments invested in collection and recycling infrastructure, helping to drive up collection and recycling rates. For example: the **United Kingdom** launched the Household Waste Recycling Collaborative Change Programme in Northern Ireland, providing GBP 23 million to support councils in improving recycling services and achieve Recycling Collaborative Change recycling targets. The **City of Copenhagen** invested DKK 1.5 million for the industry pilot test Holy Grail 2.0, which aims to increase the quality of recycling and documentation of recycled material through intelligent sorting with digital watermarks. The **City of Toluca** implemented a programme through which citizens can exchange recyclable waste, including plastic, for vouchers that can be accumulated and used to purchase consumer items for the basic basket.

In addition to investments, 76% of governments are promoting collection, sorting, reuse, and/or recycling schemes. **New Zealand** carried out a consultation on a plan to standardise kerbside collection systems and transform recycling systems, with the objective of diverting food waste from landfill, alongside reducing consumer confusion and contamination to ensure higher quality recycling. Looking ahead, **Scotland**'s Deposit Return Scheme system, due to launch on 16 August 2023, will cover glass, metal, and PET plastic drinks containers between 50ml and 3l, with a collection target of 90% of containers by 2024. Recyclable plastic film and flexible packaging is to be collected for recycling from both households and businesses in Scotland (and across the UK) by March 2027.

Going forward, governments are also focusing on implementing firstly deposit return schemes and secondly EPR schemes to ensure finance for collection, sorting, and recycling systems and improve collection rates: 88% of governments are already implementing deposit return schemes or planning to do so, and 53% for EPR schemes.

New examples of actions to increase collection, sorting, and recycling rates, and facilitate the establishment of the necessary infrastructure and related funding mechanisms include:

- **Rwanda** initiated the development of EPR guidelines that will be completed by the Rwanda Environment Management Authority.
- The **United Kingdom** government announced the introduction of EPR in 2024. Utilising data reported in 2024, modulated fees based on recyclability will be introduced from 2025, to incentivise producers to use packaging and packaging materials that can be recycled.
- **Scotland** is working on the introduction of EPR for packaging in a phased manner from 2024 onwards. Annual targets will be set for the six packaging materials (plastic, paper/card, steel, aluminium, glass, wood) for each year from 2024 to 2030.

In total, around half of governments reported that they are tracking quantitative information on plastic collected, sorted, recycled, or composted and 47% have targets to increase these volumes by 2025. This includes:

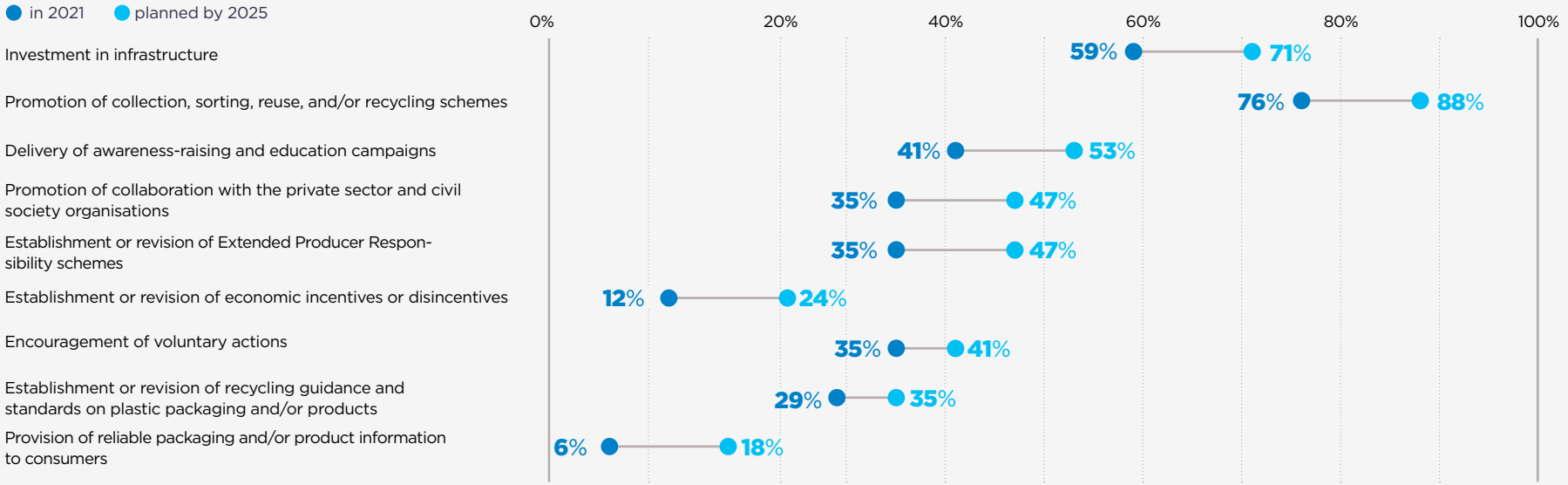
- The **United Kingdom** announced their intention to set a target of 51% of plastic packaging in the scope of their packaging Extended Producer Responsibility (EPR) scheme to be recycled by 2024, increasing to 62% by 2030. This covers all plastic packaging except packaging subject to a deposit return scheme for drinks containers. In 2021, 44% of the 2,514,000 tonnes of plastic packaging waste generated was recycled.
- **Portugal** plans to amend its existing decree on waste management to integrate a recycling target for plastic packaging placed in the market of 50% by 31 December 2025.
- The **City of Copenhagen** aims to effectively recycle 60% of collected plastic by 2022 and reach 86% of plastic collected for recycling by 2025, of which 75% will be effectively recycled. In 2020, 26% of the plastic waste of the city was collected for recycling.
- **The Netherlands** aims to increase their rate of plastic reused or recycled to 50% by 2025.
- In **France**, the 3R decree sets a general recycling goal for all single-use plastic packaging of 100% by 2025.

Setting targets and tracking data around collection, sorting, and composting rates for plastic packaging or products is particularly important due to the current lack of data on this area and the need to scale up infrastructure.

FIGURE 19

Many governments are working on promoting collection, sorting, reuse, or recycling schemes, and investing in infrastructure

Percentage of government signatories reporting taking specific measures



5 DECOUPLING

WHY DECOUPLING?

Moving towards a circular economy for plastic packaging involves decoupling from finite (fossil) resources. This is achieved first and foremost by drastically reducing the need for virgin plastics through elimination, reuse, and use of recycled content. Then, over time, any remaining virgin inputs must be switched to renewable feedstocks that are proven to come from responsibly managed sources and to be environmentally beneficial.

KEY INSIGHTS

TRENDS

The majority of signatories continued to decrease virgin plastic use, yet their collective virgin plastic use has risen back to 2018 levels, largely driven by a few of the biggest plastic packaging users.

ACTIONS

To accelerate progress on the virgin reduction target, businesses need to not only exponentially increase the use of recycled plastics but also curb the growth in total plastic packaging use.

POLICY

Governments have started to set quantitative targets to stimulate the demand for recycled plastics. Tangible measures that governments can take are encouraging the use of recycled content through financial incentives or imposing a requirement for a minimum use of recycled content in plastic packaging being put on the market.

Recycled plastic bottle, UPM Raflatac

TRENDS

The majority of signatories continued to decrease virgin plastic use, yet their collective virgin plastic use has risen back to 2018 levels, largely driven by a few of the biggest plastic packaging users.

Following a two-year decrease, the use of virgin plastic by brands and retailers in the Global Commitment has gone up in 2021 (+2.5%, see figure 20).[16] This is driven by a significant increase in the total plastic packaging weight (+4.3%, see figure 20) that is outpacing the shift from virgin to recycled plastics. These aggregated numbers, however, hide a wide spread in progress across the signatory group.

In fact, the majority of brands and retailers (59%) have reduced their virgin plastic use from 2018 to 2021 and 38% also decreased their total plastic packaging use in the same period (see figure 21). These signatories demonstrate that achieving meaningful reduction is possible.

Given that the group of signatories that increased their total and virgin plastic use includes a few of the biggest plastic packaging users, the collective virgin plastic use is back at 2018 levels and the total plastic packaging use increased by 5.0% since 2018.

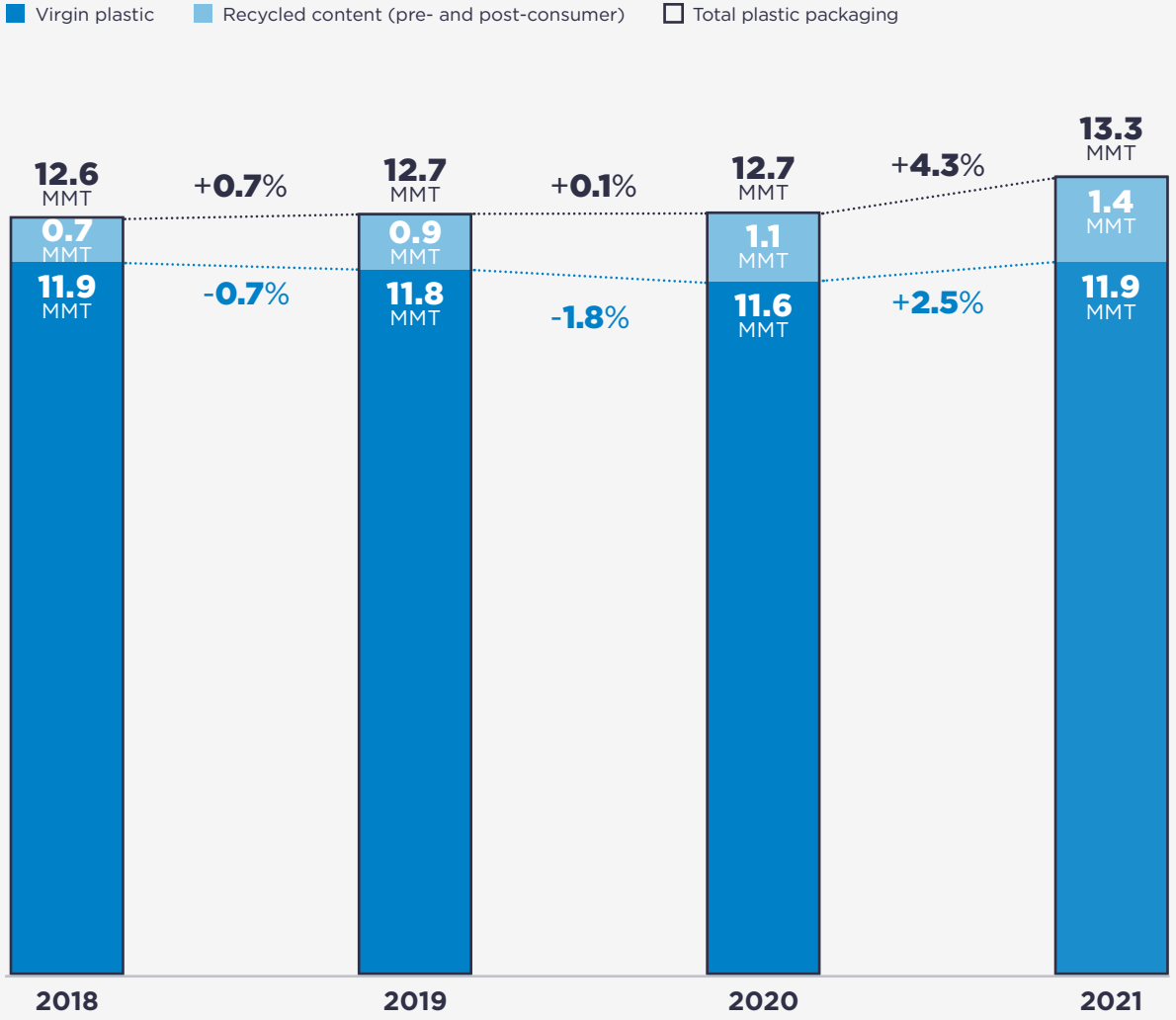
For some signatories — those most hit by the pandemic restrictions in 2020 — there is a clear covid rebound effect. Some fashion brands and on-the-go restaurants, for example, had significantly higher sales — and therefore increased use of plastic packaging — in 2021, back to pre-covid levels. This effect also contributed — to a small extent — to the group-wide increase in virgin plastic use in 2021.

Strong progress on increasing the use of recycled plastics continued, leading to brand and retail signatories doubling their use of recycled content in three year, from 4.8% in 2018 to 10.0% in 2021 (see figure 23).[17] In other words, PCR content increased as much during the past three years as it did in all preceding years since plastic packaging was first introduced.

FIGURE 20

Collective virgin plastic use has risen back to 2018 levels, mainly driven by an increase in total plastic packaging weight

Brand and retail signatories' virgin plastic and recycled plastic packaging weight (million metric tonnes, MMT)



The increase from 8.3% in 2020 to 10.0% in 2021 represents a steady annual increase in the absolute tonnage of recycled plastics used per year. Signatories will need to accelerate efforts exponentially, at a 27% annual growth rate of their share of recycled plastics in order to reach the 2025 target of 26% (based on the weighted average of all signatories' targets).

Beneath these aggregated numbers, the data showing progress varies significantly across businesses. While 60% of signatories have added at least 2 percentage points in PCR content increase from 2018 to 2021, the other 40% has not. In that same time period, 14 businesses — including major businesses such as **Keurig Dr Pepper**, **L'Oréal**, **SC Johnson**, and **Unilever** — increased their share of recycled plastics by more than 10 percentage points between 2018 and 2021.

For a significant number of signatories (39%), the growth in total plastic packaging use outpaced progress on recycled content, reinforce the need to curb that growth. Of the 59% that did reduce their virgin plastic use over that time period, roughly two-thirds did so by ensuring that on top of their increase in recycled content, they reduced their total plastic packaging use (see figure 21).

Looking at the entire brand and retail signatory group as a whole, the total plastic packaging increase in 2021 indeed outpaced the continued strong progress on the use of recycled content, leading to virgin plastic use increasing back to around 2018 levels.

On top of reducing the use of virgin plastic through elimination and recycled content, fully decoupling from finite fossil resources will require, over time, switching any remaining virgin inputs to renewable feedstocks from responsibly managed sources. In 2021, the overall proportion of renewable content reported by signatories increased marginally compared to last year, from 0.2% to 0.3%, with 14% of signatories reporting small increases in the percentage of renewable content used in their packaging.[18]

↗ ACTION

To accelerate progress on the virgin reduction target, businesses need to not only exponentially increase the use of recycled plastics but also curb the growth in total plastic packaging use.

1 Reduce total packaging use by innovating away from single-use packaging.

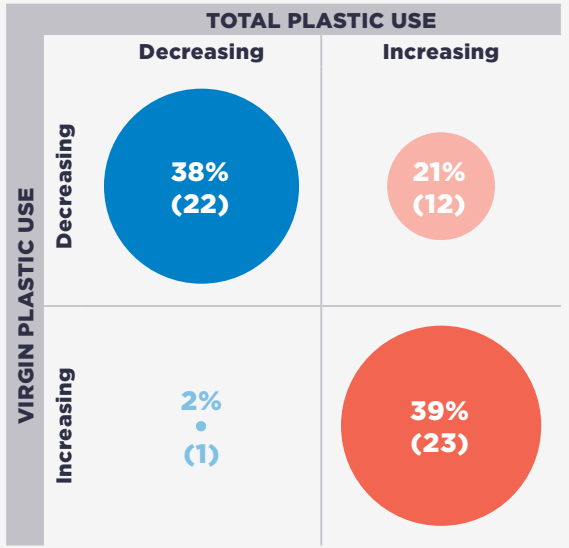
All signatories have explicitly recognised that we cannot recycle our way out of plastic waste and pollution. There is still alarmingly little progress on solutions that reduce the need for single-use packaging in order to prevent packaging waste from being created in the first place. Chapter 1 highlighted how this will require a significant step-change in the approach to elimination, moving beyond incremental changes (such as lightweighting and material substitution to other single-use materials), towards significant investment into fundamental packaging, product, and business model redesign. Chapter 2 called on all brands and retailers to develop and execute an ambitious reuse strategy with credible action plans that can lead to reuse models being scaled. The Upstream Innovation Guide offers tools, frameworks, and inspiration for both of these pathways.

Without curbing the growth in overall plastic packaging use, it is unlikely that virgin plastic consumption will be significantly reduced. This is further illustrated by playing forward a scenario in which the signatory group continues along the 4% annual growth rate of plastic packaging seen in 2021. First of all, such a trajectory would see the per annum use of plastic packaging increase by 50% in just 10 years' time. Secondly, even if signatories met their ambitious collective target of quintupling their share of recycled content to 26% by 2025, their virgin plastic use would merely remain constant, not decrease. Finally, under this scenario, meeting their virgin reduction targets would require signatories to achieve 38% recycled content by 2025, far beyond the 26% they have committed to.

FIGURE 21

Majority of brands and retailers reduce virgin plastic use between 2018 and 2021

Percentage and number of brand and retail signatories in each category



2 Accelerate the increase in post-consumer recycled content.

Increasing the use of post-consumer recycled (PCR) content is another key lever to reach 2025 virgin reduction targets. While both ambition level (targets range from 2% to 100% by 2025) and progress to date vary greatly across signatories, in aggregate brand and retail signatories will need to increase their recycled content exponentially at 27% per annum to achieve the target of 26% by 2025.

Reaching such a growth rate will become increasingly difficult. It will require signatories to incorporate recycled content into more challenging packaging types, moving beyond the current focus on rigid PET packaging, towards other plastic types and formats. One particularly challenging application is food-contact packaging, for which incorporating recycled plastics is currently hard to achieve for materials other than PET. The same is true for flexible packaging. In many countries, the use of recycled plastics in food packaging is prohibited, limiting progress. Beyond the technical challenge of incorporating recycled content into other packaging types, the high price and limited supply of recycled plastics were reported as key barriers.

Best practices shared by some of the signatories making most progress on recycled content include:

- Allocating significant budget to pay a premium price, versus the price of virgin plastic, stimulating the creation of a market with more supply (and reduced premium) over time.
- Securing supply through long-term contracts or by (co)-investing in recycling facilities. For example, retailer the **Schwarz Group**, has continued to invest in increasing the capacity of their own recycling business PreZero across Europe.
- Redesigning internal processes, requiring each brand in the organisation to justify why they are not using more recycled content, rather than seeking permission to use more.
- Making it a top procurement priority, with PCR-related performance targets for procurement teams and quarterly tracking of progress.
- Including recycled content (and other circular packaging) targets in the compensation metrics of all top and middle management across the organisation.
- Actively engaging with governments on establishing or improving EPR policies to increase collection and recycling rates and on giving priority access to recycled content for closed-loop packaging-to-packaging recycling.

FIGURE 22

Acceleration of efforts is collectively needed to achieve unprecedented reduction in virgin plastic use

Brand and retail signatories' virgin plastic packaging weight (million metric tonnes, MMT)

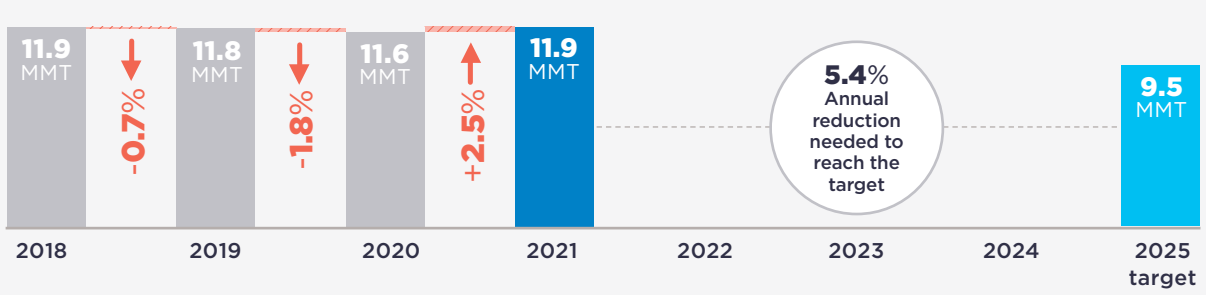
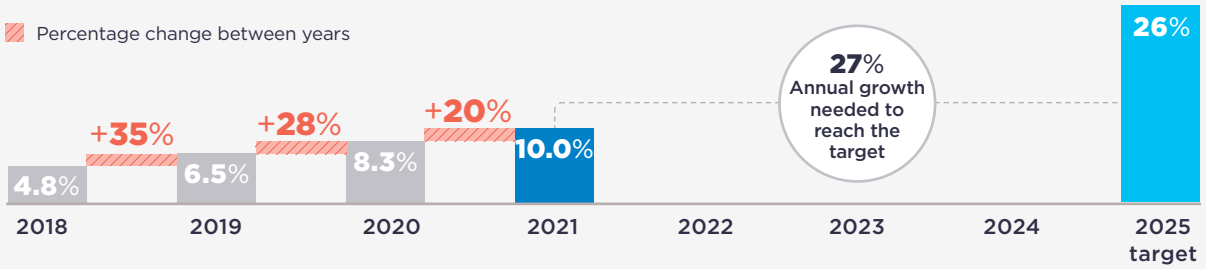


FIGURE 23

Use of PCR content has doubled in the past three years but accelerating progress is still needed to reach PCR target and reduce virgin plastic packaging

Percentage of post-consumer recycled (PCR) content for brand and retail signatories in total plastic packaging weight



POLICY

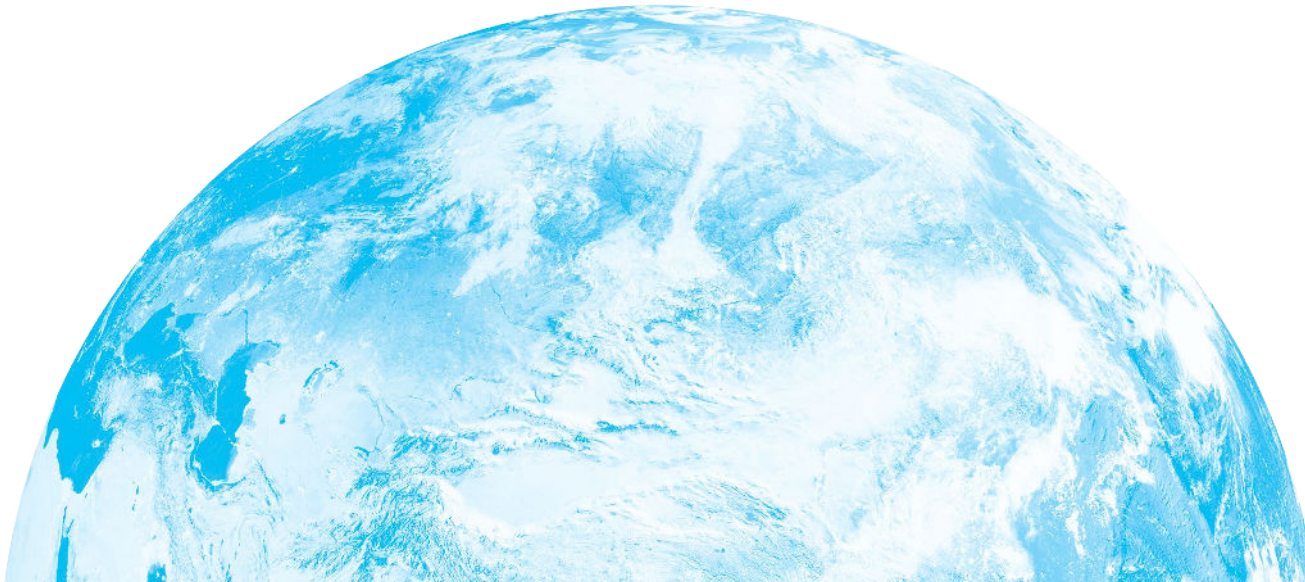
Governments have started to set quantitative targets to stimulate the demand for recycled plastics. Tangible measures that governments can take are encouraging the use of recycled content through financial incentives or imposing a requirement for a minimum use of recycled content in plastic packaging being put on the market.

Governments are using a mix of instruments to stimulate the demand for recycled plastics. These include introducing PCR content minimum thresholds (24% of reporting government signatories), establishing EPR schemes (24%), supporting products containing recycled plastics through public procurement (18%), and introducing or revising economic incentives (e.g. subsidies) or disincentives (e.g. taxes, charges) (18%). Notable examples include:

- In **Peru**, the provision on the use of recycled plastics in the law regulating Single-Use Plastic and Disposable Containers came into effect in December 2021. It stipulates that the manufacturers and bottlers of PET bottles for beverages for human consumption, cleaning products and personal care, must incorporate 15% recycled material in their composition.
- Within the framework of the Chilean Plastics Pact (PCP), **Chile** has prioritised the modification of health regulations to incorporate recycled plastic in food packaging.
- In the **United Kingdom**, a GBP 200 per tonne tax on plastic packaging with less than 30% recycled content was introduced in April 2022. It is estimated to lead to around 40% more recycled plastic being used in packaging in 2022/2023, with a potential saving of nearly 200,000 tonnes of CO_2. In effect, a tonne of recycled plastic will become over GBP 600 per tonne more valuable.

Looking forward, a number of governments are planning to use EPR (38%) and communication campaigns (25%) to further stimulate the demand for recycled plastics. Four of the reporting government signatories (38%) have set quantitative targets linked to their commitment to stimulate the demand for recycled plastics. For example:

- **Portugal** set a target of at least 25% recycled plastic into PET bottles by 2025, increasing to 30% by 2030.
- In the **Netherlands**, the Plastics Pact NL set a target of at least 35% recycled content in new products and packaging by 2025.



6 TRANSPARENCY

WHY TRANSPARENCY?

Promoting transparency on signatories' commitments, as well as the actions they take and their progress towards achieving them, sits at the heart of the Global Commitment. This transparency is crucial for signatories to take more informed and targeted actions, for investors and societal organisations to hold signatories accountable, and to drive the transition to a circular economy. This is achieved not just through the public disclosure of targets — both qualitative and quantitative — and progress towards them, but also through providing common definitions and clear and consistent presentations of data.

KEY INSIGHTS

TRENDS

Mandatory disclosure[19] of total plastic packaging weight for business signatories was introduced for this reporting cycle, representing another step forward in transparency for this group since the launch of the Global Commitment.

ACTIONS

Signatories are strongly encouraged to introduce a third-party verification system to ensure the highest standards of quality of data provided.

POLICY

34 governments have committed to join the Global Commitment in the past year,[20] bringing the total number of government signatories to 54, representing a step-change in ambition and transparency on behalf of their jurisdictions. Mandatory quantitative targets and reporting for government signatories were introduced this year.

TRENDS

Mandatory disclosure of total plastic packaging weight for business signatories was introduced for this reporting cycle, representing another step forward in transparency for this group since the launch of the Global Commitment.

Following the introduction of mandatory total and/or plastic packaging reduction targets in 2021, all[21] brand and retailer signatories are now disclosing their total plastic packaging use, compared to 76% in 2021. Although not bound by mandatory requirements, the proportion of packaging producer signatories choosing to publicly disclose the weight of their plastic packaging also increased from 35% in 2021 to 39% in 2022.[22]

This year, 83% of brands and retailers provided details of which categories of plastic packaging they have in their portfolio and a breakdown by weight, up from 76% in 2021 (see figure 24). The share of packaging producers providing these details remains at 81%. The public data provided by these signatories offers valuable information on the types of packaging being used today, helping to shed light on the challenges of — and potential solutions for — a circular economy for plastics.

Overall, there has been an improvement with 41% of signatories indicating having third-party verification in place for some or all data in 2022, which is an increase compared to 33% in 2021. This does mean the majority of signatories, (59%), had no third-party verification in place in 2022, with 46% having no plans to do so in the near future (see figure 25).

ACTION

Signatories are also strongly encouraged to introduce a third-party verification system to ensure the highest standards of quality of data provided.

To ensure data quality and consistency, signatories are encouraged to verify their plastics data through an independent third party. While there was a year-on-year improvement in the number of signatories with third-party verification, translating to higher data quality and more consistent results, the majority (59%) are still going without.

Also, we encourage any plastic and packaging producers that do not currently report publicly on the amount of plastic or plastic packaging they use to do so to ensure full visibility of the plastic they put on the market and provide further context to the progress made on their targets.

Disclosing portfolio breakdown helps shed light on the challenges businesses face and potential solutions to interpret the progress made by signatories towards these targets. The increase seen this year, as described above, is a good step and we encourage all signatories to follow this positive example.

FIGURE 24

Public reporting of plastic packaging portfolio split increases among brand and retail signatories

Percentage of packaging producer, brand, and retail signatories publicly disclosing their plastic packaging portfolio breakdown

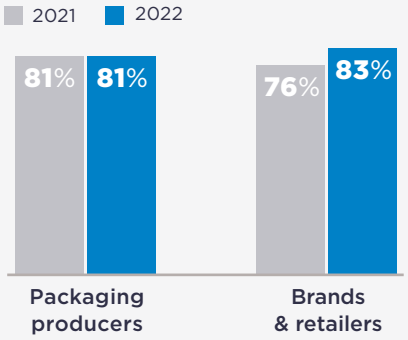
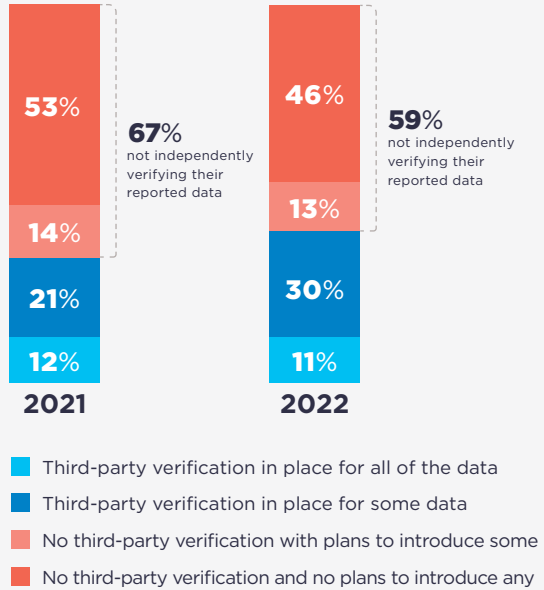


FIGURE 25

An increasing minority of signatories now verify their data through a third party

Status of third-party verification measures, as a percentage of all signatories



POLICY

34 governments have committed to join the Global Commitment in the past year, bringing the total number of government signatories to 54, representing a step-change in ambition and transparency on behalf of their jurisdictions. Mandatory quantitative targets and reporting for government signatories were introduced this year.

The 34 additional governments who agreed to join the Global Commitment over the past year will start reporting on their progress in 2023 along with the other 20 existing governments signatories. This indicates that plastics is becoming an increasingly important topic for governments, and that the Global Commitment is a key leverage to action.

Mandatory requirements for government signatories to set quantitative targets in order to measure progress towards a circular economy for plastics were introduced during this reporting cycle. 59% out of the 17 reporting government signatories have set at least one quantitative target linked to their overarching commitments, with the rest of the group currently working on establishing such targets. In 2021, 53% of reporting government signatories were tracking quantitative information on collection, sorting, or composting rates for plastic packaging or products and 47% had set related targets for 2025. Additionally, to further increase the ambition level of the Global Commitment over time, government signatories have also been requested to set up quantitative baselines and targets on at least two additional areas by 2023.

Currently, the two additional areas where most signatories set targets were to eliminate problematic or unnecessary plastic packaging/products and incentivise the use of reusable, recyclable, or compostable plastic packaging (35%).

Governments in both low- to high-income countries have highlighted challenges linked to the lack of available data, capacity, and resources for data collection and analysis in setting up quantitative baselines and targets. General data on the plastic market, including the number of plastic products put on the market and market value, is especially lacking, as well as information on alternatives to single-use plastic packaging/products and local recycling capacity. To fill in this data gap and better understand the material flow along the plastic value chain, impacts of existing policies and actions, and potential opportunities for improvement, governments have been exploring solutions to improve data on collection and recycling performance through waste compositional analysis and digital tools.

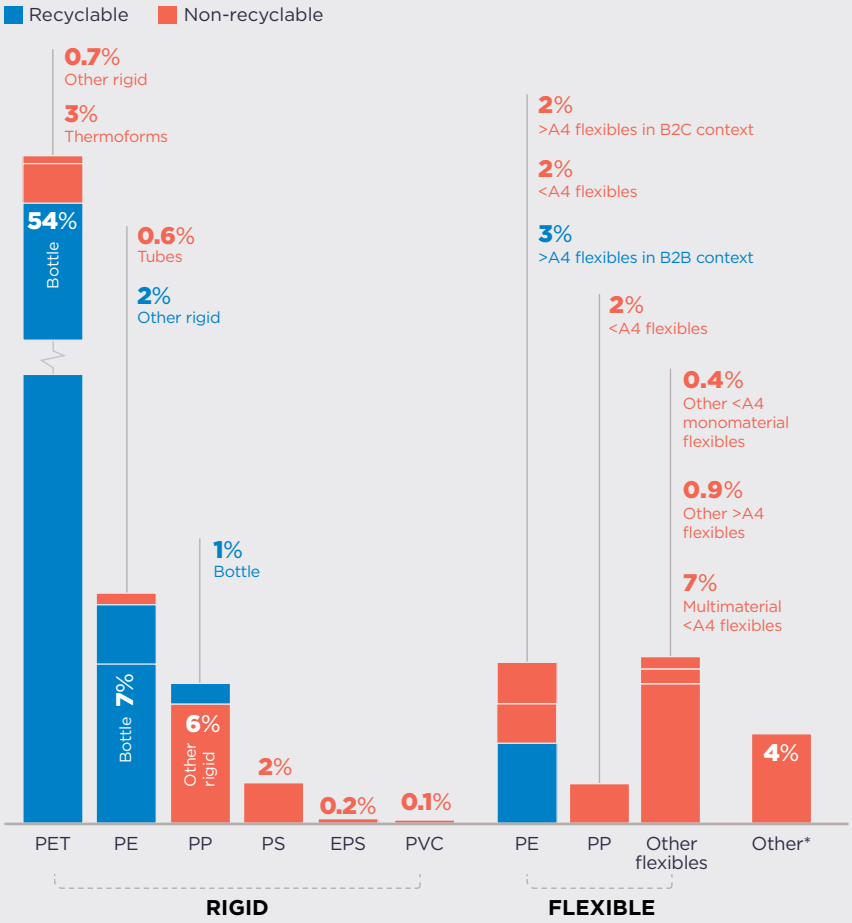
Lastly, it is important to note that in the context of the resolution agreed at UNEA 5.2 for an international legally binding instrument on plastic pollution, the intergovernmental negotiating committee will consider the provision of specific national reporting as appropriate. The experience and learnings from quantitative baselines and targets set under the Global Commitment can therefore inform the signatories on key challenges and opportunities related to reporting during the negotiation on the international legally binding instrument.

APPENDIX

FIGURE 26

Breakdown of plastic packaging reported by Global Commitment signatories

Percentage of total plastic packaging (weight) reported by brand and retail signatories



Notes: Recyclability is assessed according to the Global Commitment definition — which requires that recycling is proven to work 'in practice and at scale' — and using the suggested thresholds and outputs of the 2021 Plastics Initiative Economy Recycling Rate Survey. For more information see chapter 3 ("Reusable, recyclable, or compostable").

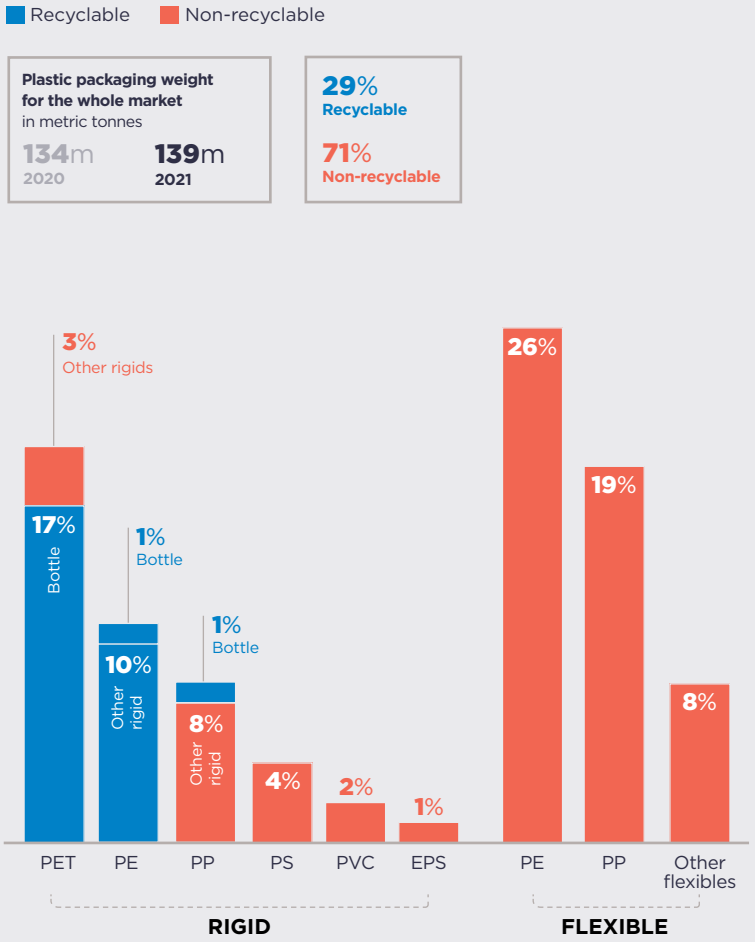
Percentages exclude three signatories which did not report their portfolio breakdown to the Ellen MacArthur Foundation or used the Recyclability Assessment Tool as specified. The aggregate percentage recyclable in this figure differs from Figure 15 (65.0% recyclable) because (1) it includes the % of packaging for which a system for recycling exists but the actual packaging design makes the packaging unfit for the system, as this analysis only looks at packaging type, not at detailed packaging design and (2) it excludes 1.8% which is not recyclable according to the Ellen MacArthur Foundation's assessment, but which was reported as recyclable by businesses who chose to deviate from the Foundation's assessment methodology for some categories of packaging.

*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.

FIGURE 27

Breakdown of global plastic packaging market

Percentage of total global plastic packaging market (by weight)



Notes: Source of plastic packaging weight data: Wood MacKenzie.

Recyclability is assessed according to the Global Commitment definition — which requires that recycling is proven to work 'in practice and at scale' — and using the suggested thresholds and outputs of the 2022 New Plastics Economy Recycling Rate Survey. For more information see chapter 3 ("Reusable, recyclable, or compostable").

APPENDIX

PLASTIC PACKAGING REDUCTION TARGETS IN THE GLOBAL COMMITMENT

In 2020, it became mandatory for brand and retail signatories to set targets to reduce total plastic packaging or use of virgin plastic in packaging by 2025. Plastic packaging reduction targets can manifest in a variety of ways. Below is an overview of different types of reduction targets that can be set, and the specific requirements for reduction targets to be accepted within the Global Commitment, aimed at maximising their transparency and consistency.

To be accepted in the Global Commitment, targets must be formulated as an absolute reduction in the total weight of plastic packaging by 2025, or as a reduction in the total weight of virgin plastic in packaging by 2025. They should be set against a recent, historical baseline, and expressed in line with the following structure:

"By 2025, we will reduce our total annual [plastic packaging / virgin plastic in packaging] by [xx] % compared to [xx] mln tonnes in 20[xx]"

	Accepted in the Global Commitment	Not accepted in the Global Commitment
What is being reduced?	✓ **Total weight of plastic packaging or virgin plastic in packaging** Signatories are permitted to express targets either as a reduction of total plastic packaging weight, or as reduction of total virgin plastic (from both finite and renewable sources) in packaging. Given the need for reduction in the overall amount of plastic packaging, as well as the amount of virgin plastic in packaging, virgin reduction targets are expected to be underpinned by efforts on reuse and elimination, and not exclusively based on increasing recycled content.	X **Virgin fossil-based plastic in packaging** Targets to reduce virgin fossil-based plastic cover efforts to increase renewable content as well as those on recycled content and reducing plastic packaging volumes overall. To avoid detracting focus from efforts on overall reduction — delivered through elimination and reuse — by incorporating an overly broad set of contributing measures, these types of targets are not accepted. X **Reduction of packaging made from other materials and other products** There is a need to reduce overall packaging volumes, regardless of material. However, the focus of the Global Commitment is specifically on plastic packaging.
How is the reduction calculated?	✓ **'Absolute' reduction** To build an economy that can thrive long term, there is a need for absolute — not relative — decoupling from fossil fuels, and an absolute reduction in the negative impacts on the world's natural systems. As a result, reduction targets in the Global Commitment must be calculated in absolute terms against the total amount of plastic packaging (or virgin plastic in packaging) in the baseline year.	X **'Relative' reduction** Reduction targets measured relative to sales (e.g. 'intensity' per dollar of revenue or units sold), or a future estimated scenario (e.g. versus a projected total for a year under 'BAU') or any other 'relative' benchmark are not accepted. Dependent on levels of actual or assumed organic growth, these types of targets can result in widely varying levels of actual reduction and, in some cases, growth in absolute levels of plastic packaging or virgin plastic use.
What baseline is used?	✓ **Published total weight for a recent year (2017 or later)** Reduction should be calculated against a recent, historical base year for which the total weight of plastic packaging has been calculated. This baseline weight must be reported publicly to ensure transparent measurement of progress, and will be used to show how much progress has been made against targets through annual progress reporting as part of the Global Commitment.	X **Baselines that aren't published** Transparency on the baseline weight is critical to measure progress against the target set and as such ensure credibility of the commitment. X **Baselines for any year before 2017** This is aimed at ensuring similar timelines across signatories and focusing measurement on recent efforts and progress achieved since the launch of the Global Commitment, in line with other commitments made.
What is the timeline for achievement?	✓ **2025** Reduction targets must be set to be delivered by 31/12/2025. This reflects the need to start acting now, and is aligned with all other commitments signatories have made as part of the Global Commitment.	X **Any timeline beyond 2025** While some signatories may have separately set 2030 targets and communicated these elsewhere, the Global Commitment requires that at least an intermediary 2025 milestone is set in this case.

ENDNOTES

1 According to the Global Commitment's definition of recyclability — more information is provided in Chapter 3.

2 For signatories where data on key metrics was lacking for 2018, 2019 or 2020, data was extrapolated based on the metric average for the group.

3 Business signatories with annual plastic (packaging) volumes in excess of 10,000 metric tonnes or revenues in excess of USD 500 million were eligible to report through the Ellen MacArthur Foundation in the 2022 reporting cycle. These businesses represent more than 99% of plastic packaging weight covered by the full Global Commitment signatory group. Signatories below both thresholds were asked to report progress publicly through their own channels.

4 Progress reports from business signatories CarbonLITE Recycling and Huidu environmental protection technology (Shanghai) co., LTD, and from government signatories the Walloon Government, the Republic of Seychelles Ministry of Environment, Energy and Climate Change and the Government of Catalonia (Generalitat de Catalunya), Spain were not received at the time of completion of the 2020 reporting cycle.

5 The percentage increase reported here refers to that seen for signatories reporting in both of the last two years (i.e. new examples from signatories reporting for the first time in 2022 are not counted as part of the increase).

6 For signatories where data on key metrics was lacking for 2019 and/or 2020, data was extrapolated based on the metric average for the group.

7 The change reported here refers to that seen for signatories reporting in both of the last two years (i.e. new examples from signatories reporting for the first time in 2022 are not counted as part of the increase).

8 For signatories where data on key metrics was lacking for 2020 (i.e. new signatories reporting for the first time in 2022), data was extrapolated based on the metric average for the group.

9 Individual percentages for reusable, recyclable, compostable, and 'not reusable, recyclable, or compostable' will not sum to 100% for all individual signatories or the group as a whole as a large proportion of reusable packaging is also recyclable.

10 The full results of the 2022 Plastics Initiative Recycling Rate Survey can be accessed here.

11 In this report 'flexible packaging' specifically refers to business-to-consumer flexible packaging only. This is in line with the language used in the report titled — *Flexible packaging: the urgent actions needed to deliver circular economy solutions.*

12 The increase reported here refers to that seen for signatories reporting in both of the last two years (i.e. recycled plastics from signatories reporting for the first time in 2022 are not counted as part of the increase).

13 Signatories sharing data on the share of their recycling output by polymer with the Ellen MacArthur Foundation accounted for 88% of total output from recycler signatories.

14 The increase reported here refers to that seen for signatories reporting in both of the last two years (i.e. recycled plastics from signatories reporting for the first time in 2022 are not counted as part of the increase).

15 The Ellen MacArthur Foundation's Plastics Pact Network is a globally aligned response to plastic waste and pollution, which enables vital knowledge sharing and coordinated action. It is a network of national and regional (multi-country) initiatives which brings together key stakeholders to implement solutions towards a circular economy for plastic, tailored to each geography. Read more about it here.

16 For signatories where data on key metrics was lacking for 2020 (i.e. new signatories reporting for the first time in 2022), data was extrapolated based on the metric average for the group.

17 For signatories where data on key metrics was lacking for 2018, 2019 or 2020, data was extrapolated based on the metric average for the group.

18 For signatories where data on key metrics was lacking for 2020 (i.e. new signatories reporting for the first time in 2022), data was normalised based on the data reported for 2021

19 For brand and retail signatories with a virgin plastic packaging reduction target.

20 These government signatories have committed to join the Global Commitment and will start reporting in 2023. These include the national governments of Canada, Colombia, Greece, Italy, Norway, the Republic of Korea, Spain, Uganda, Australia, Belgium, Kenya, Mexico, Thailand, and Ghana; as well as sub-national level governments of the City of Paris, region of Central Greece, Basque Country, the city of Mexico, and three of Mexico's state-level governments, Baja California, Baja California Sur, and Sinaloa as well as the cities of Querétaro, Ensenada, and San Miguel de Allende and 10 states from Brazil including São Paulo and the nine states of the Consórcio Nordeste: Alagoas, Bahia, Ceará, Maranhão, Paraíba, Pernambuco, Piauí, Rio Grande do Norte, and Sergipe.

21 Except for one signatory that has set a total reduction target and is therefore not subject to this new mandatory requirement.

22 The increase reported here refers to that seen for signatories reporting in both of the last two years (i.e. new signatories reporting for the first time in 2022 are not counted as part of the increase).

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