THE ANZPAC PLASTICS PACT

ANNUAL IMPACT REPORT 2021

Establishing a baseline for the 2025 Regional Plastics Packaging Targets

ANZPAC PLASTICS PACT | PLASTICS PACT

SUPPORTED BY APCO

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Foreword

Launched in 2021, the ANZPAC Plastics Pact (ANZPAC) was established to bring together Australia, New Zealand and the Pacific Islands behind a shared vision of a circular economy for plastic, where plastic never becomes waste or pollution. Beginning with 60 founding Members, the Pact has since grown to over 100 organisations, connecting regions rich in diversity, bound by geographic remoteness and challenges of scale.

Creating large-scale economic and social change of this kind requires broad cross-sector coordination that will be accelerated through shared knowledge, industry led innovation, coordinated action and investment. The ANZPAC Impact Report creates a baseline for the region and measure the progress of the program in its first years of activity.

The report is based on aggregated data from its Member organisations from 2021 to ensure a transparent and data-driven approach towards circularity, and provides a valuable snapshot into the beginning of our journey as a connected region. Moreover, it identifies our obstacles, wins and where action is needed. The data confirms that whilst we have a long way to meet the 2025 Regional Plastics Targets, Members are already undertaking good upstream initiatives, and some materials have a reliable recovery pathway. However, collection presents a considerable issue towards increasing recovery rates, while reuse systems are failing to reach significant scale. The significant distances of remote and regional geographies and data gaps across the ANZPAC region are also presenting challenges that must be considered when developing up and downstream circular solutions.

Plastic pollution is a systemic issue and not one single geography can tackle plastic pollution on their own. As a collaborative platform, ANZPAC and its Members are fundamentally transforming our region's response to plastic pollution and waste. Meanwhile, the UN Treaty negotiations are a major driver for the necessary changes needing to occur on a global scale. I am delighted to announce that ANZPAC, under APCO has now joined the Business Coalition for a Global Plastics Treaty to support these efforts further.

Initial achievements include:

- **2025 Roadmap developed** with tangible deliverables identified.
- **Recovered polymer specifications**, **reuse feasibility and mapping study** and **plastics communication guide launched** to help decision making and communication around plastic packaging.
- **Established a Recyclability Assessment baseline** for the ANZPAC region.
- **Established governance framework** including Advisory Committee and Working Groups to support regional collaboration and action.

Contents

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Acknowledgement

The ANZPAC Plastics Pact acknowledges the opportunity for meaningful engagement with all traditional Owners, Custodians and Peoples across the Oceania region. This includes Aboriginal, Torres Strait Islanders, Māori and the many Pacific Island indigenous peoples that shape the island community. We recognise the importance of authentic, genuine partnerships and the unique opportunity ANZPAC presents to connect these knowledge systems to create a new plastics economy for the Oceania region.

ANZPAC has started this journey and is working on the ground to create partnerships that represent traditional knowledge systems, including Te Ao Māori, Aboriginal, and other Indigenous views from across the region.

The ANZPAC Team comes humble and willing to learn, recognising the importance of traditional cultures and their continuing connection to land, sea, culture and community and we pay our respects to Elders past and present.

"We want to congratulate the ANZPAC Plastics Pact & its members for their transparency and efforts in compiling all the information that builds this baseline report. Data shown in this report is a crucial step that marks the beginning of a journey. It provides insight into where to focus and enhances evidence-based decision-making. We encourage members to continue working together to drive progress and deliver meaningful impact against their ambitious 2025 targets." - **Andrea Cantú**, Project Manager, Plastics Initiative.

"Congratulations to the ANZPAC Plastics Pact and its members in the delivery of this Impact report, which highlights some of the progress already made since launch and the actions required to progress towards the ambitious 2025 targets. The ANZPAC Plastics Pact can enable members to accelerate their impact through collaboration, sharing knowledge and co-ordinating action, working collectively towards the shared vision of a circular economy for Plastics"- **David Rogers**, International Director, WRAP.

APCO has worked closely with the Ellen MacArthur Foundation (the Foundation) and WRAP UK to develop ANZPAC. Having launched numerous Pacts already, the two organisations have brought extensive expertise to the development process and support when consulting with local stakeholders in the Pacific Islands and New Zealand.

Image courtesy ANZPAC Member, Underwater Earth, photographer is Aaron Spence

Our Vision and Targets to 2025

"ANZPAC envisions a connected and resilient region that delivers a circular plastics economy through robust collaboration with benefits for communities, economies, and natural ecosystems."

The ANZPAC Plastics Pact is a collaborative solution that unites a diverse region with the common goal of addressing the transnational nature of plastic pollution.

To ensure the entire region has an active voice in shaping the strategic priorities of ANZPAC, a senior steering committee of industry and community experts has been established to oversee the program.

The ANZPAC Collective Action Group (ACAG) is a group of leading industry, government and civil society representatives from Australia, New Zealand, and the Pacific Islands.

In addition to this, ANZPAC regularly brings together its Members through workstreams to help create impactful activities for each country in line with strategic priorities.

ANZPAC Regional Plastics Targets to 2025

TARGET 1:

Eliminate unnecessary and problematic plastic packaging through redesign, innovation, and alternative (reuse) delivery models.

TARGET 2:

100% of plastic packaging will be reusable, recyclable, or compostable by 2025.

TARGET 3:

Increase plastic packaging collected and effectively recycled by 25% for each geography within the ANZPAC region.

TARGET 4:

Average of 25% recycled content in plastic packaging across the region.

Introduction

The ANZPAC Plastics Pact (ANZPAC) was founded to align the region's response to plastic packaging by working towards the 2025 ANZPAC Regional Plastic Packaging Targets (the Targets).

Covering Australia, New Zealand, and the Pacific Islands, ANZPAC is the first Plastics Pact in the Oceania region and the second regional Plastics Pact to become part of the Ellen MacArthur Foundation's global Plastics Pact network. With Pacts in Africa, Europe, North America and South America, this network is a globally aligned response to plastic waste and pollution.

ANZPAC is led by the Australian Packaging Covenant Organisation (APCO) with strategic support from the Ellen MacArthur Foundation (the Foundation) and WRAP. Stakeholders across the supply chain united in agreement that change is critical, and that coordinated action is necessary for addressing plastic pollution of this scale. ANZPAC Member Reporting is critical in understanding how Members are progressing towards the Targets and to connect Members working on similar activities to elevate efforts.

What is the ANZPAC Impact Report?

The ANZPAC Impact Report publishes aggregated data from ANZPAC Member Reports from calendar year 2021 to deliver on ANZPAC's commitment to a transparent and data-driven approach towards circularity. It highlights benchmarking data, identifies gaps and opportunities for future collective action, and tracks progress towards the Targets. To account for significant data gaps and provide greater accuracy, data from the 2020 ANZPAC Baseline Recyclability assessment was used as a benchmark for Target 3 instead. Through the Impact Report, we can track and better understand our progress each year and have an evidence base for shaping the direction of the program.

The 2022 ANZPAC Reporting Round was the first time Members and Supporters shared their plastic packaging data and initiatives for a regional analysis. The benchmarking figures represent plastic packaging sold by 51 businesses, representing 83.5% of ANZPAC's brand owner and retail member base, whilst the 8 other Members that submitted a report were government and supporting Members. It is important to note that the majority of Members reported their data from calendar year 2021 with low to medium accuracy, as they needed to setup new systems and processes to provide data on their plastic packaging. However, we expect accuracy to increase for the next reporting round.

Whilst data reporting is critical for measuring progress towards the Targets, and identifying trends and priorities for the Pact, it is evident that progress must also be inclusive of the positive impact activities have on communities. The ANZPAC region is fundamentally diverse, geographically remote and import dependent, with most areas characterised as remote or regional, which present real challenges to achieving scale and reporting on circularity. Meaning that progress in geographical archetypes 2 (regional areas) and 3 (remote areas) may generate significant benefits to communities, that may not be reflected in the data due to their smaller scale.

59
ANZPAC Members submitted a report.

51 **ANZPAC Members**

43 **Brand Owners**

2 **Raw Material Suppliers**

6 **Recyclers & After-use Companies**

8 **ANZPAC Supporters**

Members and Supporters*

*Not all Members and Supporters submitted a report in 2022, as some joined past the April submission deadline.

Our baseline

The ANZPAC Member Reports establishes an impact baseline for the region against the four Regional Plastics Targets developed to drive a circular economy for plastic packaging.

Of the Members that reported, brand owner and retail Members accounted for 442,116 tonnes of plastic packaging placed on the market in Oceania.

Compared with 2019-20 data (baseline recyclability assessment) this accounts to 34% of the plastic packaging placed on the market in Oceania.

TARGET 1:

Eliminate unnecessary and problematic plastic packaging through redesign, innovation and alternative (reuse) delivery models.

2,232 tonnes

of problematic and unnecessary single-use plastic packaging were eliminated by ANZPAC Members during the reporting period.

TARGET 2:

100% of plastic packaging to be reusable, recyclable, or compostable by 2025.

63%

of plastic packaging put on the market by ANZPAC Members is currently designed for end-of-life recoverability (reuse, recycling, or composting).

* This Target is measured via the annual ANZPAC Recyclability Assessment.

TARGET 3:

Increase plastic packaging collected and effectively recycled by at least 25% for each geography within the ANZPAC region.

17%

recovery rate recovery of plastic packaging placed onto the market across the ANZPAC region*

- 25.8% recovery rate of plastic packaging placed onto the market in New Zealand.
- 15.9% recovery rate of plastic packaging placed onto the market in Australia.
- 0.1% recovery rate of plastic packaging placed onto the market in Pacific Island Countries (PICs).

TARGET 4:

Average of 25% recycled content in plastic packaging across the region.

7.5%

average of recycled content included in plastic packaging across ANZPAC brand owner and retailers.

Are we on track to 2025?

TARGET 1:

Despite some progress being made to eliminate problematic and unnecessary single-use plastic packaging, more work needs to be done.

By following redesign models, ANZPAC Members eliminated 2231.80 tonnes of problematic and unnecessary single- use plastic packaging during the reporting period and have already eliminated fragmentable plastics from their plastic packaging portfolios. However, this represented only 6.5% of packaging placed on the market. Furthermore, national, and state-based bans implemented by governments would have contributed to these figures. A priority for ANZPAC will be to develop a regional list for elimination to drive a strong reduction agenda and equip Members with strategies for elimination.

ANZPAC Members:
ANZPAC Members are urged to integrate circular design principles for plastic packaging into their operations, to optimise outcomes for packaging circularity including designing for functionality and sustainability.

Government Members:
Governments can facilitate elimination of unnecessary and problematic plastic packaging by aligning material bans across the region. This reduces the likelihood of unintended problematic packaging, such as banned materials, ending up in neighbouring countries.

TARGET 2:

A lot of focus is currently set on the recyclability of packaging; however, the inclusion of reuse models must be prioritised to create meaningful impact.

While reports reveal that 63% of packaging placed onto the market was designed for end-of-life recoverability (reuse, recyclability, or composability), 53% of this was specific to recyclability. Linked to the region's low recovery rate of 17%. it is clear that in addition to investment into recycling infrastructure, more emphasis is needed for upstream solutions.

Furthermore, only 16% of brand owner Members conducted reuse pilots throughout the reporting period and 21% of brand owner Members having reuse models in place. Demonstrating the viability of reuse models to mobilise Members will be a priority for ANZPAC through a reuse feasibility study and running pilot projects to build a business case for the uptake of reuse.

ANZPAC Members:
Brand owners and retailers need to prioritise upstream packaging design solutions and implement reuse models, especially when recycling infrastructure is limited.

Government Members:
The implementation of national material recovery facility (MRF) standards and reuse targets can accelerate the transition to improved circularity.

Are we on track to 2025?

TARGET 3:

Lack of recycling infrastructure in remote and regional communities continues to be a critical barrier in recovering plastic at end-of-life in the ANZPAC region. Distance in remote and regional areas and the lack of kerbside recycling for flexible plastics in the region also present challenges.

ANZPAC Member Reports showed that collection and therefore recovery rates are considerably low for plastic packaging across Oceania; this is evident in the Member reports that only 26% of plastic packaging being collected by recyclers at end-of-life. A priority for ANZPAC will be running projects that improve the collection and recycling of plastic packaging in remote and regional areas.

ANZPAC Members:
Accelerated action on extended producer responsibility and product stewardship is needed from brand owners. For example, setting up collection systems or investing into recycling infrastructure.

Government Members:
Further investment into local infrastructure is needed to make meaningful progress towards this Target. Governments can facilitate this by prioritising the development of a container deposit scheme (CDS) in New Zealand and Pacific Island Countries and supporting expansion into Australia's remote and regional locations.

TARGET 4:

An average of 7.5% post-consumer recycled content was reported by ANZPAC Members as included in plastic packaging. To achieve greater circularity in plastic packaging, more emphasis needs to be placed on transitioning to formats where recycled content is available.

Some developments have been seen in increasing recycled content in PET packaging and using advanced recycling technologies for flexible packaging formats. A priority for ANZPAC will be to unlock feedstock by strengthening collaboration across the region.

ANZPAC Members:
Brand owners and retailers need to continue to incorporate recycled plastic packaging where recycled materials are available such as rPET or rHDPE. This target links with Target 3, increased and improved collection will generate more feedstock.

Government Members:
Interventions are needed to remove barriers and improve the economics of using recycled content to make meaningful progress towards the Target.

Target 1

Eliminate unnecessary and problematic plastic packaging through redesign, innovation, and alternative (reuse) delivery models.

Eliminating unnecessary and problematic plastic packaging:

Phasing out problematic and unnecessary plastic packaging is essential for shifting our economy and community away from single-use disposable plastic packaging to more durable reusable and recoverable packaging. By tackling these problematic items, we can reduce packaging consumption, litter, and waste, improve the economics of recycling, increase employment, lift recycling rates, help to boost recycled content in packaging and reduce the amount of unnecessary plastic packaging on our shelves.

ANZPAC Members have demonstrated action towards eliminating the priority single-use, problematic or unnecessary plastic packaging across Oceania - through redesign, innovation and switching to alternative reuse delivery models. They have successfully eliminated fragmentable plastics from their packaging portfolios, however greater action is needed to eliminate problematic materials such as rigid PVC packaging, opaque PET bottles, rigid plastic packaging with carbon black, and moulded EPS packaging for white/brown goods and electronic, which together makeup 97% of the problematic materials placed onto the market by ANZPAC Members.

[1] Australian Packaging Covenant Organisation, December 2020. Action Plan for Problematic and Unnecessary Single-Use Plastic Packaging.

What is a problematic and unnecessary plastic packaging or component?

The definition put forward by the Australian Packaging Covenant Organisation (APCO) for problematic and unnecessary plastic packaging was used for this first ANZPAC Member Reporting.

APCO describes packaging as problematic that is currently[1]:

- Not reusable, recyclable, or compostable; or
- Difficult to collect/recover for reuse, recycling, or composting purposes; or
- A material that hinders, disrupts, or obstructs opportunities to recover other materials or resources; or
- A significant contribution to the plastic litter problem; or
- Manufactured with, contains or has contained hazardous chemicals or materials (e.g., PFAS, BPA) that pose a significant risk to human health or the environment; or
- Avoidable (or could be replaced by a reuse model) while maintaining utility.

Eight problematic or unnecessary items were identified as part of the ANZPAC Member Reports to be eliminated by the end of 2025.

1. Lightweight plastic shopping bags

2. Fragmentable plastics

3. Expanded polystyrene (EPS) packaging for food and beverage service and retail fresh produce

4. EPS loose fill packaging

5. Moulded EPS packaging for white/brown goods and electronics

6. Rigid polyvinyl chloride (PVC) packaging

7. Opaque polyethylene terephthalate (PET) bottles

8. Rigid plastics packaging with carbon black

The majority of these plastic packaging formats have been subject to government bans and phase-outs across the ANZPAC region, due to their problematic nature. This list draws on the work previously done by APCO, the lead organisation of the ANZPAC Plastics Pact, **published in 2020.**

Definitions and criteria for elimination under review

A dedicated project working group of ANZPAC Members has been established to review the definitions for problematic and unnecessary plastic packaging. These will consider regional differences in geography, climate, culture, and reuse/recycling infrastructure to ensure the criteria for elimination is robust and regionally applicable.

Single-use plastic packaging (SUP) elimination list

In addition to the review of definitions, ANZPAC will focus on collaboration to accelerate redesign and innovation strategies for eliminating current problematic and unnecessary plastic packaging, identify further items for elimination, and drive a strong reduction agenda across the region. A SUPs elimination list will draw on the problematic nature of each item, regional differences, alternative options and potential impacts of alternatives, as well as strategies for elimination. Making the elimination and reduction of plastic packaging overall a priority will be critical in addressing the limited availability of recycling infrastructure for all plastics across the Pacific Island Countries and moving away from plastics that do not perform a necessary function.

What's next?

Focus on upstream innovation for plastics packaging elimination

ANZPAC is undertaking work to increase Members capacity to adopt circular design principles for their plastic packaging, with a focus on upstream innovation, elimination and reuse, as recycling is not the solution alone.

Target 1

Data insights

34,512 tonnes
placed onto the market by ANZPAC Members.

97% of problematic materials placed onto the market are made up from **rigid PVC packaging**, **opaque (PET) bottles**, **rigid plastics packaging with carbon black** and **moulded EPS packaging** for white/ brown goods and electronic.

2,232 tonnes
of problematic and unnecessary plastic packaging were eliminated during 2021 by ANZPAC brand owners and retailers.

Members collectively eliminated **30% of rigid plastics packaging with carbon black** and **26% percent of rigid PVC packaging** out of the plastic packaging placed onto the market.

Fragmentable plastics
have already been eliminated by ANZPAC Members.

Target 1

Examples of progress

MEMBERS ARE ELIMINATING PROBLEMATIC MATERIALS FROM THEIR PORTFOLIOS

Packaging manufacturer Pact Group ceased the production of expanded polystyrene (EPS) trays, well ahead of their own end of waste targets and mandated Government initiatives.

Danone (Nutricia Australia) successfully removed rigid plastic with carbon black from their YoPRO range, following intensive testing from a food safety standpoint.

Mars Australia, as of 2020, eliminated PVC from film sleeves across its Mars Food Herbs and Spice portfolio.

coles

Coles increases recovery of black plastic packaging

Black plastics are not recyclable through kerbside as the dark colour renders packaging undetectable to Near Infrared sortation in Materials Recovery Facilities, making the plastic lost to landfill.[2] In 2021, Coles transitioned from black to clear recyclable trays for their capsicum, parsnips, baby corn and Coles brands Finest pasta range, collectively removing 17.5 tonnes of non-recyclable carbon black plastic each year.[3] With this transition, Coles is one step closer to its target of all Coles Own Brand and Coles Own Liquor Brand packaging being 100% reusable, recyclable or compostable by 2025 or earlier.

[2] Australian Packaging Covenant Organisation, December 2021. Action Plan for Problematic and Unnecessary Single-Use Plastic Packaging.
[3] Coles 2021 ANZPAC Report.

MEMBERS ARE ELIMINATING PROBLEMATIC MATERIALS FROM THEIR PORTFOLIOS

Good Environmental Choice Australia (GECA) develops Reusable Plastic Bags Standard

GECA's Reusable Plastic Bags standard was developed as a starting point to empower manufacturers, retailers, and consumers to transition away from single-use plastic bags. The standard requires bag thickness to be at least 35 Qm to distinguish from reusable plastic bags and stipulates that the percentage of postconsumer materials in the bags should be at least 80% by weight. GECA wanted to provide consumers with the option of purchasing reusable bags with a high quantity of recycled content, which is why it created the standard. From a lifecycle approach, bags certified under GECA's Reusable Plastic Bags standard are far better than single-use bags – when they are appropriately reused as much as possible and eventually recycled. Woolworth's reusable bags are currently certified under GECA's standard, contributing to a reduction in the 3.2 billion single-use plastic bags in circulation every year.

ALDI eliminated plastic by transitioning to paper straws on juice poppers

Retailer ALDI successfully replaced all plastic straws in its own-brand tropical juice poppers with paper variants. By identifying and eliminating this unnecessary and problematic packaging from its supply chain, ALDI will save an estimated 18 tonnes of single-use plastic from landfill each year. This solution is now available to ALDI suppliers, enabling them to use the paper straw on other products in their range. This initiative highlights the great progress ALDI is making toward the achievement of the ANZPAC Targets to eliminate unnecessary and problematic plastic packaging.

GOVERNMENTS ACROSS THE REGION ARE ACTING ON PROBLEMATIC SINGLE-USE PLASTIC PACKAGING.

In 2021 the NZ Ministry of Environment released a timeline for material bans: It stated that polyvinyl chloride (PVC) meat trays, polystyrene (PS) takeaway food and beverage packaging, expanded polystyrene (EPS) food and beverage packaging, degradable plastic products, and plastic drink stirrers are due to be banned by late-2022; plastic produce bags and labels, and plastic tableware by mid-2023; and all other PS and PVC food and beverage packaging by 2025.

In April 2021, the Australian government established a National Plastics Plan.

This plan includes phasing out certain non-compostable plastic packaging products by 2022. It also outlines National Packaging Targets for industry, such as 100% of packaging being reusable, recyclable, or compostable by 2025.

In 2021 Government across the Pacific Islands also acted on eliminating problematic plastic packaging, with Fiji implementing a ban on polystyrene and hosting the third Clean Pacific Roundtable discussion, focusing on the role of governments in formulating and implementing robust policies and laws to help Pacific countries deal with waste management.

Target 2

100% of plastic packaging to be reusable, recyclable or compostable by 2025.

An important step to achieving a circular economy for packaging is to ensure each plastic packaging format is designed for reuse, recycling, or composting that fit the current infrastructure system. ANZPAC Members have made great progress to redesign packaging for improved recyclability. However there continues to be a considerable amount of plastic packaging items placed onto the market that do not have the sufficient scale to make collection systems financially viable, or that contain elements or components in the design that hinder recyclability. Moreover, in many areas, the infrastructure is lacking which makes the item not-recyclable in practice.

Defining recyclability

For packaging to be characterised as recyclable it must move beyond 'technical recyclability' and be recyclable 'in practice and at scale'. Under the global Plastics Pact Network this translates into assessing whether a packaging format achieves a 30% post-consumer recycling rate in multiple regions, or locally where the packaging is sold.

The Packaging Recyclability Evaluation Portal (PREP)

The majority of Australian and New Zealand ANZPAC Members are using PREP, an online tool that assesses how packaging will perform in the Australian and New Zealand resource recovery systems. It addresses many factors that can have an impact on recyclability, including the packaging shape, size, weight, inks, adhesives, and the materials used.

For every item of packaging, PREP considers these factors, as well as the availability of collection services, how the packaging will behave in a MRF and in subsequent processing facilities.

The PREP process provides an education loop between the design and the end-of-life of packaging in the Australian and New Zealand recycling systems. PREP can be used at the procurement, design, and re-design stages of the packaging development process to inform best practice design for recovery.

EMF definitions can be found here.

The range of recyclability varies in the ANZPAC region. The definitions below support the categories shown to the right in Figure 1.

The range of recyclability in the ANZPAC region
Adequate global recyclability Evidence of a system for recycling in the global market according to the New Plastics Economy 2020 Recycling Rate Survey. Greater than or equal to 30% post-consumer recycling rate in the global market.
Adequate local recyclability Evidence of a system for recycling in the local market. Greater than or equal to 30% post-consumer recycling rate in the Pact market(s).
Poor local recyclability (recyclable with lost value)[4] The assessed packaging item is both technically recyclable and widely accepted at kerbside in Australia and New Zealand, however there is an element of lost value. 'Lost Value' may refer to a loss in value of recovery or contamination.
Conditional local recyclability[5] The assessed packaging item is technically recyclable but is less widely accepted at kerbside throughout Australia and New Zealand. The council collection status for these materials falls within the Less Widely Accepted thresholds, where between 60% - 80% of the kerbside population has access to a council service. Consumers will need to Check Locally with their local council in Australia and New Zealand to determine if these materials are accepted in their kerbside recycling bin.

[4] Australian Packaging Covenant Organisation, Australasian Recycling Label Program User Guide.
[5] Australian Packaging Covenant Organisation, Australasian Recycling Label Program User Guide.

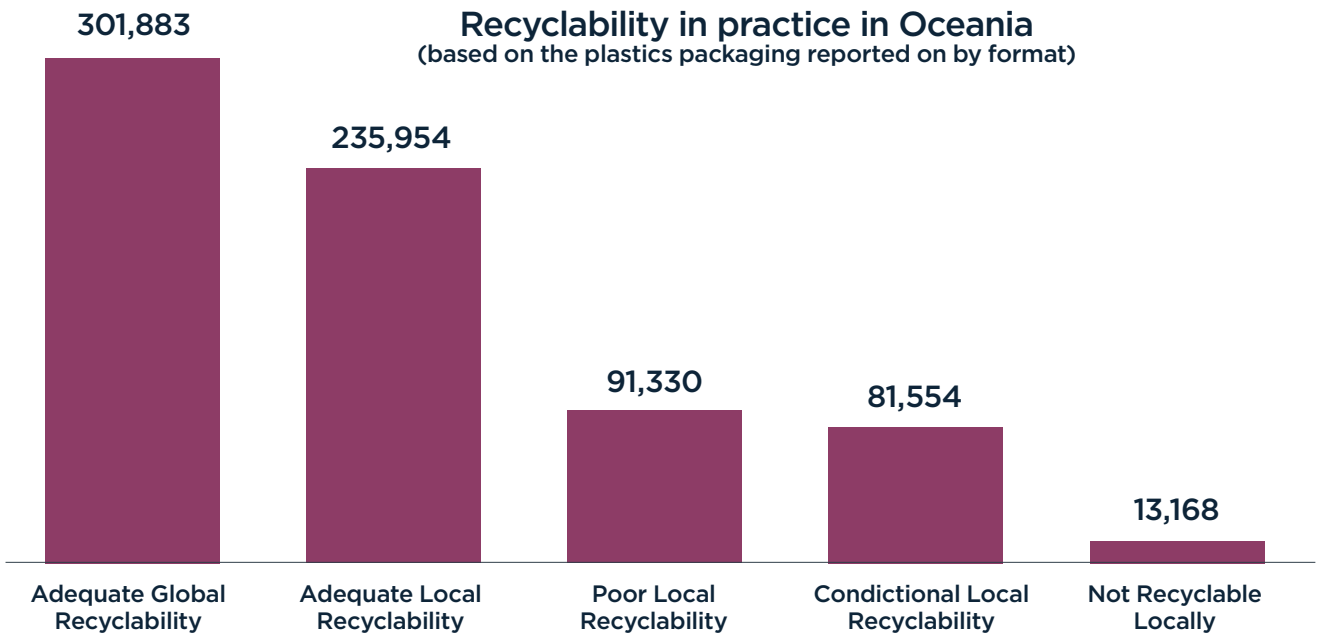

Figure 1: *Recyclability in practice in Oceania.*

Figure 1 shows the range of recyclability varies in the ANZPAC region. Most of the plastic packaging placed onto the market by ANZPAC Members falls under 'adequate local recyclability' and 'adequate global recyclability', meaning it may be considered recyclable at practice and at scale.
Adequate local recyclability makes up 53% of the total plastic packaging placed onto the market by ANZPAC Members. The remaining 47% are 'not recyclable', or do not achieve the necessary scale to move from technical recyclability to recyclability at practice and at scale (< 30% post-consumer recycling rate).

Formats classified as having an 'adequate recyclability' in the ANZPAC region* based on Member Reporting are:

- PET beverage bottles.
- PET thermoforms.
- HDPE bottles and other rigids (for example: jars, closures, crates, and drums etc).
- HDPE other rigid.

*Based on ANZPAC Member Reporting. No plastic packaging formats have evidence for an adequate recycling system in Pacific Island Countries.

In addition to local recyclability, it is important to consider evidence of recycling systems globally and the formats that are recyclable in practice and at scale for investment opportunities into regional infrastructure. This comparison revealed that PP bottles and mono material PE in the business-to-business (B2B) space may have good recyclability potential.

Formats that have evidence for an adequate recycling system globally:

- PP bottle.
- mono material PE in B2B.
- PET bottle.
- HDPE bottle.
- HDPE other rigid.

Navigating the complexities around compostable packaging:
While certified-compostable packaging has a role to play in the transition to a circular packaging economy, the recovery system is currently under-developed across the ANZPAC region and faces similar challenges to materials with poor recyclability value with no proven end-markets. In addition to this, certified compostable packaging is frequently contaminated by non-certified compostable plastic packaging, or contaminates other recycling streams due to the inability of users and recyclers to distinguish compostable from non-compostable plastic packaging.

To navigate these complexities, ANZPAC will develop a strong position statement with a 'red' and 'green' list to make it easier for Members to choose when and where certified-compostable plastic packaging presents an appropriate recovery pathway.

Urgent investment is needed into reuse and refill models
The mismanagement of plastic packaging poses a major challenge on a global and local level. As shown on Figure 1, the majority of ANZPAC Members' plastic packaging is technically recyclable, however consumption and recovery data show that the post-consumer recovery rate remains significantly low throughout Australia, New Zealand, and Pacific Island Countries, meaning most plastic packaging is currently not recyclable in practice and at scale. When implemented correctly, reusable packaging models can avoid these challenges with significant environmental benefits from a circular economy perspective, by keeping the material in the market for longer and reducing the need for the extraction of new materials.

During 2021, 4% of plastic packaging placed onto the region by ANZPAC Members was reported as reusable. In addition to this, 7 brand owners and retailers trialled reuse models for their consumer or non-consumer plastic packaging, however the majority of pilots remained unsuccessful. It is critical that organisations scale their reusable packaging for it to provide a meaningful circular solution.

In particular, brand owners and retailers need to prioritise choosing avoidance and reuse models over recyclability when there is limited available recycling infrastructure like in Pacific Island Countries and remote areas across Australia and New Zealand. Attention must also be placed on scaling up existing reuse systems, factoring in time to account for consumer behaviour change and timeframes and scalability for industry when conducting reuse pilots.

REUSABLE PACKAGING: Packaging which has been designed to accomplish or prove its ability to accomplish a minimum number of trips or rotations in a system for reuse[6].

What's next?

Making reuse models viable

Demonstrating the viability of reuse models and education on the benefits of reuse will be a focus for ANZPAC in 2023. In late 2022, ANZPAC conducted a reuse feasibility and mapping study to develop and drive the reuse agenda across the ANZPAC region. The team is now supporting Members to implement reusable packaging pilots and develop a proof of concept for the environmental, economic, and social benefit of reuse in the ANZPAC region.

[6] Australian Packaging Covenant Organisation, February 2022. Scaling up reusable packaging, version 1.

Target 2

Data insights

63% of plastic packaging put on the market by ANZPAC Members is currently designed for end-of-life recoverability (reuse, recycling, or composting).

6% of plastic packaging placed onto the market by ANZPAC Members is designed for composting.

4% of plastic packaging put on the market by ANZPAC Members is reusable.

7 Brand owners and retailers are currently trialling reuse models.

53% of plastic packaging put on the market by ANZPAC Members is currently designed for recyclability in Oceania in practice and at scale.

Target 2

Examples of progress

BRAND OWNERS AND RETAILERS ARE INVESTING IN RECYCLABLE PACKAGING

DISRUPTIVE PACKAGING
Better packaging. No compromises.

Disruptive Packaging launched their Unicor boxes, a reusable and recyclable alternative to EPS and waxed cartons within the fresh fish industry. In addition to this, Disruptive Packaging has established a closed loop collection system at Sydney Fish Market to collect and recycle used boxes.

Arnott's Group

Arnott's redesigns biscuit portfolio packaging

Arnott's Group has commenced transitioning its soft plastics portfolio in Australia from multi to mono-material film wrappers, helping to increase its recyclability and generate better value for the circular economy. Arnott's has transitioned 85% of its portfolio and most recently used the new film in its Farmbake product packaging, which significantly reduced the weight of plastic used by 34%. This transition is essential to create flexibility and simplification for soft plastic recycling and allow Arnott's film wrappers to be recycled in mechanical and advanced (chemical) recycling facilities. Mono-materials are aligned with APCO and Ceflex guidelines and reduces packaging waste and eliminates the need for a complex sorting process.

INVESTING IN REUSABLE PACKAGING DESIGN

ecostore
+ safer for you

Ecostore redesigns Cleaner Concentrate bottles to be refillable

Ecostore recently launched Cleaner Concentrate, a refill bottle containing 50ml of cleaning formula with the same performance as its 500ml counterpart. In 2021, New Zealand was one of the largest single-use plastic waste generating countries per capita[7] worldwide. Ecostore aimed to create a more sustainable alternative to plastic bottles and triggers while maintaining product quality and adding value for customers. The new design of the bottle contains 90% less plastic packaging, meaning Ecostore customers will be using significantly less plastic per refill. The bottles and triggers are 100% recyclable and can be refilled and re-used up to 24 times. Since the initiative's launch in 2021, Ecostore has already reduced plastic waste, saving more than 8,500kg of plastic from landfill.

[7] Statista, 2019. Available at: statista.com

Target 3

Increase plastic packaging collected and effectively recycled by at least 25% for each geography within the ANZPAC region.

Whilst plastic packaging can be designed for increased recycling value and local infrastructure capacity, for it to be recycled in practice it must also have the systems in place to effectively collect, sort and recover the materials. As a necessary first step towards this Target, ANZPAC undertook the first material flow analysis to establish a baseline. As the 25% increase in plastic packaging collection and effective recovery for each geography accounts for all plastic packaging that has been put onto the entire ANZPAC region, ANZPAC recognised the need to engage with stakeholders beyond our Membership to get a more accurate insight into the current landscape.

Establishing a baseline for the ANZPAC region

In 2021 ANZPAC conducted a Baseline Recyclability Assessment, a benchmarking data set of the consumption, recycling, and recycling rates for 18 common plastic packaging formats used across the ANZPAC region to fill significant data gaps. This was an important first step for informing summary datasets for the inclusion in the ANZPAC Member Reporting for the Pacific Island Countries and New Zealand.

Geography	POM (tonnes)	Recycling (tonnes)	Recycling rate (%)
Australia	1,123,800	178,600	15.9%
New Zealand	146,200	37,700	25.8%
Pacific Island Countries	34,800	40	0.1%
ANZPAC region total	**1,304,800**	**216,340**	**16.6%**

Figure 2: *Recyclability assessment results for the ANZPAC region.*

Figure 2 shows a collective plastic packaging recovery rate of 16.6% for the entire ANZPAC region, with New Zealand sitting at 26%, Australia at 16.5% and the Pacific Island Region (Tonga, Solomon Islands, Vanuatu, Fiji, and Samoa) at a 0.1% recycling rate.

Improved collection is needed to make meaningful progress towards this Target

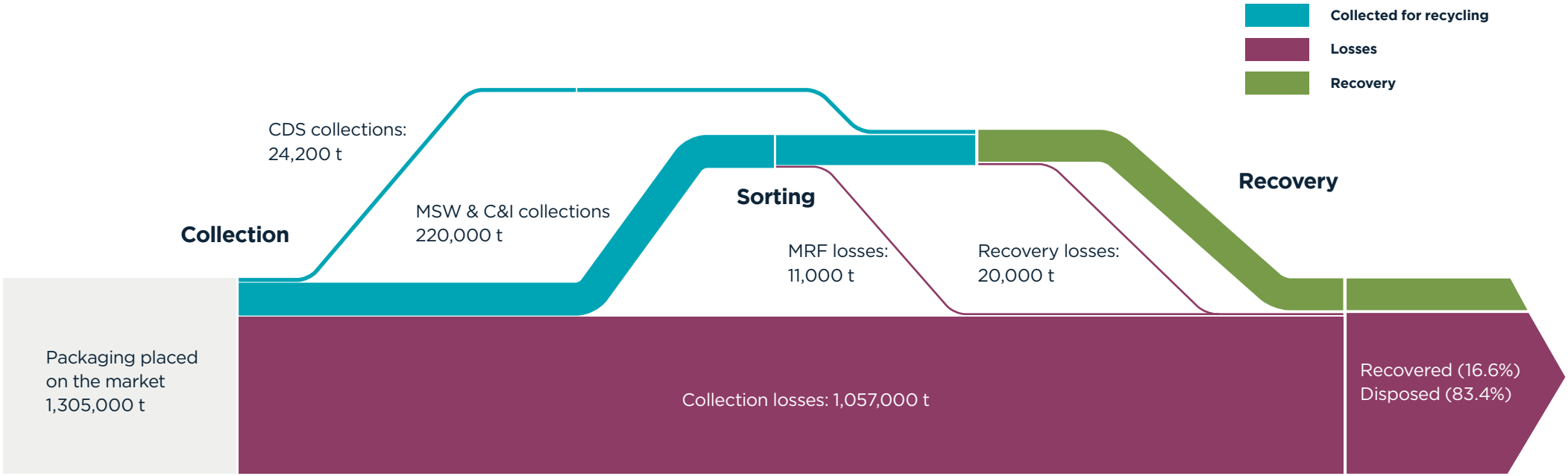

Figure 3: *Flows of plastic packaging placed on market, collected, and recycled, as well as losses at various points in the system in 2020.*

Figure 3 shows that approximately 220,000 tonnes of used plastic packaging were collected for recycling via municipal solid waste (MSW), commercial and industrial (C&I) and kerbside collections across the ANZPAC region, in addition to 24,200 tonnes collected via CDS in Australia. Losses from the point of collection (i.e., not collected for recycling) were significant across all countries, with just over 1 million tonnes of used plastic packaging lost to landfill.

The high rate of collection losses, which stands at 81%, highlights a pressing need for improving consumer education and expanding the availability of collection and recycling pathways for plastic packaging.

Increasing recycling capacity through product stewardship

The data indicates that whilst investments have been made to strengthen Australia and New Zealand's local infrastructure over the past few years, Pacific Island Countries continue to have limited access to recycling. The Pacific Island Countries occupy comparatively low population size and volumes of plastic packaging, and geographical isolation, perpetuate import dependencies and barriers towards making recycling economical. Whilst work is being done to develop plastic value chains - including the feasibility of a regional recycling feasibility hub - more action is needed to incentivise collection and create sustainable end markets for the recovery of certain plastic packaging formats in this region.

PET and HDPE bottles showed the highest recovery rate across the board, demonstrating the viability of CDS in making meaningful progress towards collection and recovery. As significant advancements in infrastructure in Pacific Island Countries is unlikely until 2025, the region relies on extended-producer responsibility from Australian and New Zealand brand owners to facilitate the reprocessing of the material.

For New Zealand, recycling rates are likely to increase by 2025 due to the development of a regulated Plastic Packaging Product Stewardship Scheme. The objective is to fundamentally transform how plastic packaging is used and recovered in New Zealand to reduce the amount of plastic waste ending up in the environment and landfill. At this stage, all plastic packaging used for consumer goods sold through retail or wholesale are in scope for the New Zealand Food and Grocery Council, in addition to liquid paperboard and compostable plastic.

In Australia, an industry-led National Plastics Recycling Scheme (NPRS) for soft plastic packaging is currently under investigation to make kerbside collection available for soft plastics. The Australian Food and Grocery Council is leading this scheme and will use advanced recycling technologies to create cleaner waste streams and make it easier for people to recycle soft plastics back into new food-grade packaging.

Click here to find out more

Addressing consumer behaviour change

The majority of Australian and New Zealand brand owner Members reported the use of the Australasian Recycling Label (ARL) to inform their consumers on how to dispose of their packaging correctly. The ARL Program is an evidence-based on-pack labelling scheme that is helping consumers to recycle correctly and support brand owners and packaging manufacturers to design packaging that is recyclable at end-of-life across Australia and New Zealand.

The ARL Program features two key elements:

- The Packaging Recyclability Evaluation Portal- an online tool that assesses packaging recyclability in the Australian and New Zealand kerbside or approved drop-off recycling systems.
- The ARL – an on-pack label that provides clear and simple instructions for consumers about how to recycle all the separable packaging components.

The ARL Program has been acknowledged in Australia's National Waste Policy Action Plan and National Plastics Plan as a key action to improve consumer awareness and increase recycling rates. As part of the National Plastics Plan, the Australian Government has committed to working with industry to see the ARL displayed on 80% of supermarket products by 2023[8].

To learn more, please **click here**

What's next?

A priority for ANZPAC in 2023 will be to address the identified collection and recovery gaps for this Target, by leading and supporting the delivery of downstream pilot projects and activities that focus on improved collection and developing end markets for plastics collected in geographical archetypes 2 and 3.
These projects look to develop a proof of concept that can be scaled-up across geographical archetypes with similar waste management issues. In addition to this, ANZPAC will work with key stakeholders to remove barriers to the development of regional extended producer responsibility (EPR) model, and supporting the development of CDS in New Zealand and Pacific Island Countries.

[8] Australian government, Department of Agriculture and Waster, and the Environment, 2021. National Plastics Plan. Available at: https://www.agriculture.gov.au/sites/default/files/documents/national-plastics-plan-2021.pdf

Target 3

Data insights

Member Reporting

26% of plastic packaging collected by recyclers and after use ANZPAC Members was recovered at end-of-life*.

*Based on 4 recyclers and after use companies that had comparative data.

63.5% of PET collected by recyclers and after use Members was effectively recovered.

The second highest was HDPE bottles with 5.14%

Baseline recyclability assessment

17% average recovery rate in Recyclability Assessment.

42% PET recovery across the region.

Target 3 Examples of progress

Coca-Cola New Zealand

Feasibility of CDS development in New Zealand

Coca-Cola provided support to the New Zealand government's process of setting up a CDS for beverage containers. Coca-Cola actively participated in the first round of consultation on scheme type involving governance, materials, deposit versus return, and financial model in 2021 and were part of the government's Technical Advisory Group on container schemes.

STRONGIM BISNIS

A pilot for a PET plastic bottle value chain in Solomon Islands.

Strongim Bisnis (Australia's major private sector development initiative for the Solomon Islands) is aiming to partner with an Australian plastic company (introduced to the program through ANZPAC) to tackle the plastic crisis and improve the waste value chain. The initiative will focus on piloting a PET plastic bottle value chain, with bottles collected, compacted and shipped to Australia to be processed into rPET resin. Currently, most used PET bottles are disposed of at over-capacity landfill sites, burned at the roadside or end up in the ocean. The widespread reliance on bottled water results in approximately 945 tonnes of poorly disposed PET plastic being generated annually, with potentially millions of bottles entering the Pacific Ocean. The expected impact of the pilot program will be to support and test all the component parts of a PET plastic bottle value chain in the Solomon Islands, an area unsupported by a container deposit or levy system. It is expected that the program will increase the value of PET bottles to create jobs and income earning opportunities while reducing littering.[9]

[9] Asia Pacific Waste Consultants, 2019. Solomon Islands – Best Practice Waste Management report (Draft), Centre for Environment Fisheries & Aquaculture Science (CEFAS), UK. Available at: https://www.cefas.co.uk/clip/resources/reports/south-pacific-clip-reports/best-practice-waste-management-report-solomon-islands-apwc/

Coca-Cola South Pacific

Coca-Cola Europacific Partners' Mission Pacific Program

Coca-Cola Europacific Partners (CCEP) Fiji has operated the Mission Pacific PET bottle and can collection scheme, in partnership with Fiji Water and Motibhai, since 1999 as part of the company's ongoing commitment to the sustainability of its packaging. Collectors are paid a collection refund for returned bottles and cans in three locations across Fiji. Last year Mission Pacific collected and shipped 140 tonnes of PET offshore for recycling. Mission Pacific has expanded its PET plastic bottle collection recently through a number of initiatives to further increase the collection of plastic bottles and cans and drive positive recycling behaviour in Fiji.

Asahi BEVERAGES | PACT GROUP | Coca-Cola EUROPACIFIC PARTNERS

Industry partnership develops Australia's biggest PET recycling plants

Pact Group, Cleanaway, Asahi Beverages, and Coca-Cola Euro pacific Partners (CCEP) have partnered to build two new PET recycling facilities by 2023. The participants wanted to address the lack of local reprocessing capacity and the availability for recycled content. The new facilities will process an estimated equivalent of 1 billion bottles each year, producing over 20,000 tonnes of new recycled PET bottles and food packaging using state-of-the-art sorting, washing, decontamination and extrusion technology.

Cleanaway will provide available PET through its collection and sorting network and CCEP, Asahi Beverages and Pact Group will purchase the recycled PET from the facility to use in their respective products, with Pact Group running the plant once it is fully functional. The facilities enable the creation of a circular economy by utilising the expertise of each participant while collaboratively closing the loop on plastic beverage container waste.

The first exportation of plastic bottles for recycling from Vanuatu

Plastic bottles are a commonly littered item in Vanuatu. In 2020, World Vision, The Vanuatu Environmental Science Society (VESS) and RecycleCorp organised an event called Selem Plastik mo Sevem Solwota, supported by the Australian Government and in partnership with ANZ Bank. The aim of the event was to collect plastic bottles over a two-to-four week period by offering a monetary incentive (per bottle collected) to members of the Port Villa community in Vanuatu, where no plastics were being recycled. In three and a half days, nearly 1.4 million bottles were collected, and over 10 million vatu (c. AUD$125,000), was paid to the local community. This initiative provided RecycleCorp and VESS with the opportunity to trial a pilot program for plastic bottle recycling.

With the assistance of the IUCN Plastic Waste Free Islands project and Searious Business, VESS and RecycleCorp arranged for eight tonnes (of the total 32 tonnes that was collected) of plastic bottles to be exported to Australia for recycling. The export of the plastic bottles enabled the partners to understand what is needed to sustain a program for the collection, processing and shipping of plastic bottles from Vanuatu.

Target 4

Average of 25% recycled content in plastic packaging across the region.

This Target is an average of 25% recycled content across all ANZPAC Members incorporated throughout their entire plastic packaging portfolio, rather than per plastic packaging unit. In addition, it only considers post-consumer recycled content, which is material waste generated by households or by commercial, and institutional facilities. Currently an average of 7.5% post-consumer recycled content is incorporated into Members' plastic packaging portfolio.

Understanding the barriers

There are a diverse range of barriers associated with using post-consumer recycled materials in Oceania. These include inefficient traceability, limited availability, generally higher cost of recycled materials, strong reliance on imported packaging and general issues associated with the recycling system, loss of recycling value, contamination in the recycling stream, and the inclusion of problematic elements, all present considerable barriers for increasing plastic packaging with post-consumer recycled content. Plastic packaging for food contact applications - sold by most of the ANZPAC Member base - and healthcare products face additional challenges of stringent health and safety standards, that is impacting progress towards this Target.

Strengthening collaboration across the region to support increased availability and use of recycled content

Local infrastructure developments, like PET recycling plants, have been crucial for increasing use of feedstock and reprocessing capacity. Meanwhile we are starting to see some fast-moving-consumer goods brands utilise recycling infrastructure to overcome contamination challenges for incorporating recycled content into food packaging, particularly for flexible packaging applications.

The development of regional EPR schemes and/or plastic value chains would not only work to benefit the recovery of plastic packaging, but aid with wider availability of feedstock for in demand materials like PET. Australian and New Zealand brand owners can facilitate this by collaborating with Pacific Island Members who are trying to establish sustainable end markets for their plastic packaging.

Overall, where feasible, ANZPAC Members need to prioritise transitioning towards plastic packaging formats where recycled materials are more readily available and recovered like HDPE and PET plastics to make meaningful progress by 2025.

Released Recovered Polymer Specifications for the Region

ANZPAC released the Regional Recovered Polymer Specifications, which encompass a set of 12 Australian industry-agreed standard specifications for recycled polymer materials. In addition, separate specifications for individual polymers have been developed for the sorting and reprocessing stages in the recovery process. Find out more **here**.

What's next?

ANZPAC will activate Members through working groups to optimise recycled content opportunities across the region and unlock available feedstock from remote and regional areas for reprocessing.

Target 4

Data insights

7.5%
An average of 7.5% post-consumer recycled content was included in plastic packaging by brand owners and retailers.

38.5%
Only 38.5% brand owner Members are using some level of recycled content in plastic packaging (1% or more).

Target 4 Examples of progress

BRAND OWNERS TRANSITION TO RECYCLED PET (RPET)

Packaging manufacturer Klöckner Pentaplast (**Linpac Packaging**) incorporate an average of 95% of post-consumer recycled content across all PET trays they produce.

In May 2022, **Coca-Cola Oceania** and local bottling partner Coca-Cola Europacific Partners announced that more than half the bottles in their portfolio of beverage brands in Fiji are now made from 100% recycled plastic. All plastic PET bottles, smaller than one litre, are now made from 100% recycled plastic.

Asahi transitions its soft drink bottles to 100% recycled plastic

As part of its commitment to sustainability, in 2022 Asahi Beverages completed transitioning of all of its 450ml and 600ml soft drink bottles to 100% recycled plastic (excluding the cap and label). In 2022, this resulted in over 120 million soft drink bottles being made with 100% recycled plastic in Australia, bringing the total number of these bottles produced by Asahi Beverages to more than 700 million.

BRAND OWNERS TRANSITION TO RECYCLED PLASTICS THROUGH ADVANCED RECYCLING TECHNOLOGIES

Progress for recycled flexible food-contact packaging through advanced recycling technologies

Global flexible packaging manufacturer **Amcor** has collaboration plans for the reprocessing of PP and PE into post-consumer circular content, which could incorporate upto 20,000 tonnes of post consumer circular content into flexible packaging by 2025.

Mondelez uses advanced recycling technology to source new chocolate wrappers

Using advanced recycling technology, Cadbury is sourcing the equivalent of 30% of the plastic needed to wrap its Cadbury Dairy Milk, Caramilk and Old Gold family chocolate blocks range from recycled sources. The new wrappers are an investment into the circular economy and aim to set new ground in finding solutions to meet the National Packaging Targets and ANZPAC Plastics Targets. New, advanced recycling technology will be a key enabler of the circular economy for soft plastic waste. Cadbury's investment in recycled packaging for Cadbury Dairy Milk blocks demonstrates domestic demand for recycled material and supports the emerging technology that will help achieve a domestic circular economy in Australia.

Where to next?

The transnational nature of plastic pollution is a systemic issue that must be tackled by the whole plastics value chain from across the region to address its negative impacts on our communities.

With the development of an international legally binding instrument on plastic pollution underway, it is evident that we cannot continue business-as-usual, and intervention is necessary to address the scale of the problem. APCO has signed up as a Member of the Business Coalition, through which ANZPAC will communicate the progress of the Treaty negotiations to its Members.

Priorities in 2023

The data shows that Members are already undertaking upstream initiatives to design packaging for circularity and materials like HDPE and PET already have reliable recovery pathways in Australia and New Zealand. However, more efforts are needed to eliminate problematic materials and elements that cause gaps in infrastructure and significant collection losses, hinder large increase in recovery rates.

This presents an opportunity for Member and Government collaboration to initiate EPR for certain plastic packaging and accelerating the upscaling of reuse models, particularly in regional and remote geographies where waste and recycling management continue to be limited.

Target 1:
Develop a regional list for elimination to drive a strong reduction agenda and equip Members with strategies for elimination.

Target 2:
Demonstrate the viability of reuse models by running pilot projects to build a business case for the uptake of reuse.

Target 3:
Work with priority stakeholders to remove barriers to the development of regional EPER models and/or sustainable plastic value chains, improve the collection of plastic packaging and finding end markets for plastic packaging in Pacific Island Countries to support the development of sustainable plastic value chains.

Target 4:
ANZPAC will activate Members through workstreams to optimise recycled content opportunities across the region and unlocking available feedstock from remote and regional areas.

A **Roadmap to 2025** has been developed to drive change towards a more circular economy for plastic packaging by focusing on the four ANZPAC Regional Plastics Targets and specific outcomes by 2025.

Each Target area requires accelerated action by individual Members and through collaborative projects, supportive government policy, and community education and engagement.

THANK YOU

We thank our Members for their leadership and commitment to driving a circular economy for plastics and driving progress towards the four ambitious 2025 ANZPAC Regional Plastics Targets. We thank you for sharing your knowledge through our workstreams and projects, collaboration, and efforts to transparent annual reporting on your progress and efforts towards the Targets.

As with climate change and other environmental challenges, plastics is fundamentally disruptive for society and companies. Through a circular plastics economy, rethinking plastics presents significant opportunities for organisations that decide to act early and innovate, through action such as eliminating, reducing, reusing, recycling, replacing and circulating plastics, to mitigate potential disruption.

BE PART OF THE CHANGE!

The ANZPAC Plastics Pact is always open to new Members!

ANZPAC has two Membership categories:

1. **ANZPAC Member**
   for brand owners, retailers, manufacturers and businesses throughout the plastics supply chain.
2. **ANZPAC Supporter Member**
   for government, academia, community groups, NGOs and industry association organisations.

More information on Membership and **access to the application form** is available here.

For more information about ANZPAC and to find out how to join visit the ANZPAC website here,

or get in touch with the ANZPAC Team.

Did you know
ANZPAC now has its own LinkedIn account?

Follow us and tag us to show the great work you are doing to address plastic pollution in Oceania.

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FURTHER INFORMATION

anzpacplasticspact.org.au

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