



Brussels, 27 January 2022

PET packaging moving steadily towards circularity

Main developments for advancing PET recycling identified in a new study¹

New data² for collection, recycling capacity and production for 2020 show increases in all measured factors, indicating a steady move towards circularity of the PET industry in Europe. Major growth is observed, in particular, within the PET recycling market, with an overall 21% increase in the installed capacity and totalling 2.8mt in EU27+3³.

On the recycled figures, 1.7mt of flakes was estimated to be produced in 2020. There is a steady growth within trays and sheets application, which with a 32% share remain the largest outlet for rPET in packaging, followed by food contact bottles with a 29% share. Driven by producers' pledges, who have made a range of commitments and goals to incorporate recycled content within their bottles, and with the mandatory recycled content targets – the share of food-grade rPET in PET beverage bottle production is set to continue to grow rapidly. The remainder of recycled PET, on the other hand, is used in fibers (24%), strapping (8%) and in injection moulding (1%), followed by other applications (2%).

Additionally, by 2025, as the report identifies, it is expected that 19 EU Member States will have Deposit Return Schemes (DRS) in place for PET bottles, which shows, along with the increased recycling capacities, a strong move of the PET sector towards circularity. Today seven EU Member States with established DRS achieve sorted for recycling rates of 83% or higher. This implies that with the EU Single Use Plastics Directive (SUPD), collection rate targets already in place⁴, the collection figures, as well as quality, are likely to increase substantially in the lead up to 2025.

However, some challenges remain. For instance, to meet the 90% collection rate and the mandatory recycled content targets, Europe will require an expansion in recycling capacity of at least one third by 2029.

Moreover, further innovation, support from the EU policymakers, and more robust data sources are needed in all areas of the packaging value chain to ensure progress towards the targets is achieved and measured. This will require further harmonisation and implementation of best practices for collection,

¹ *PET Markets in Europe: State of Play. Collection, Production and Recycling Data*. Plastics Recyclers Europe, Petcore Europe, NMWE, UNESDA Soft Drinks Europe. 2022

² Compared to the previous report *PET Markets in Europe: State of Play. Collection, Production and Recycling Data*. Plastics Recyclers Europe, Petcore Europe, EFBW. 2020 https://743c8380-22c6-4457-9895-11872f2a708a.filesusr.com/ugd/dda42a_e0c40c546a7446daa7ba5e0bedd67cca.pdf

³ +3: UK, Norway, Switzerland

⁴ The SUP Directive requires each Member State to achieve a 77% collection rate for beverage bottles by 2025 and 90% by 2029.



sorting and design for recycling to facilitate more rPET being used within its own application cycles.

The significant increase in PET collection and recycling sends a positive signal to the market and will boost confidence in further accelerating PET's circularity.

ABOUT

Natural Mineral Waters Europe

Natural Mineral Waters Europe represents almost 550 natural mineral and spring water producers in Europe, most of them small- and medium sized companies. NMWE is dedicated to promoting the unique qualities of natural mineral and spring waters as well as sustainable use of water resources and circular economy.

www.naturalmineralwaterseurope.org

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PETCORE Europe

PETCORE Europe (formerly PETCORE - PET COntainer REcycling) is the association based in Brussels since 1993 representing the complete PET value chain in Europe, from PET manufacture to conversion into packaging, as well as recycling and other related activities.

PETCORE Europe is at the forefront of working with all stakeholders to ensure the sustainable growth of PET as a packaging material of choice, while promoting increases in post-consumer PET collection and recycling. They produced the first guidelines for PET bottle recycling and have conducted annual surveys on PET recycling since 1997. They liaise with the European institutions about the importance of the PET value chain, especially as PET significantly contributes to the Circular Economy. Furthermore, they respond to any concern or issue raised by stakeholders. The membership of the association is formed by four leading industry sector European associations, i.e., CPME, EuPC, Forum PET Europe (the converters) and PRE (the recyclers). There are also a large number of individual companies involved in the PET value chain.

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Plastics Recyclers Europe

Plastics Recyclers Europe (PRE) is an organization representing the voice of the European plastics recyclers who reprocess plastic waste into high-quality material destined for the production of new articles. Recyclers are important facilitators of the circularity of plastics and the transition towards the circular economy. Plastics recycling in Europe is a rapidly growing sector representing over €3 billion in turnover, 8.5 million tonnes of installed recycling capacity, 600 companies and over 20.000 employees.

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UNESDA Soft Drinks Europe

Established in 1958, UNESDA Soft Drinks Europe is the Brussels-based trade association representing the non-alcoholic beverages sector. Its membership includes 10 companies and 23 national associations from across Europe. UNESDA members are involved in the production and/or distribution of a wide variety of non-alcoholic beverages including still drinks, carbonates, fruit drinks, energy drinks, iced teas and sport drinks.



UNESDA's policy priorities are Sustainability (e.g., beverage packaging, collection, recycling), Responsibility (e.g., sugar reduction, school policies, marketing practices towards children and labelling) and Competitiveness (e.g., taxation, market access).

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