

THE UK
PLASTICS
PACT



ROADMAP 2025 CREATING A CIRCULAR ECONOMY FOR FLEXIBLE PLASTIC PACKAGING

Version 3 - July 2024

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WHY WE MUST ACT NOW...

TAKING ACTION ON FLEXIBLE PLASTIC PACKAGING



Flexible plastic packaging is generally a resource efficient material; it's lightweight and can play an important role in protecting food from becoming waste.

However, we need to call time on the outdated linear approach of 'make, take and dispose' to achieve targets set out by The UK Plastics Pact. We must value this material, using it only when necessary and ensuring it is captured within a circular economy.

Flexible plastic packaging represents more than 27% of all UK consumer plastic packaging, but only 7% is currently recycled. Urgent action is required to address the complex challenges that underpin this: poor design, collection infrastructure, inconsistent communications, sorting challenges, reprocessing technology, capacity and unstable end markets.

Therefore, galvanising the entire plastics value chain around a common roadmap for flexible plastic packaging remains one of the top priorities of the Pact.

Scope of this roadmap

A report published by The UK Plastics Pact on [eliminating problem plastics](#) highlighted several flexible plastic packaging items that can be deemed problematic and unnecessary. A key challenge being that the majority of household flexible plastic packaging is not recycled which can lead to it polluting our environment.

Part of the solution could be through the use of compostable plastic, in particular where it can facilitate the recycling of food waste; however, the infrastructure to enable this is not in place.

Taking action on flexible plastic packaging will contribute significantly to UK Plastics Pact targets:

- 100% of plastic packaging to be reusable, recyclable or compostable by 2025; and
- 70% of plastics packaging effectively recycled or composted by 2025.

Potential opportunities for compostables are outlined in The UK Plastics Pact [guidance on opportunities for compostable plastic packaging](#).

The problem is less severe when we look at non-consumer plastic packaging as evidenced in the [Packflow report](#), where it is estimated that a very high proportion of non-consumer flexible plastic packaging is recycled.

For this reason, the roadmap focusses on addressing the recycling of flexible plastic packaging from consumer (household) sources.

“We need the entire value chain to step up efforts to tackle flexible plastic packaging, push past the challenges and ensure we achieve circular plastics economy as a top priority.”

Harriet Lamb, CEO, WRAP

WHY WE MUST ACT NOW...

TAKING ACTION ON FLEXIBLE PLASTIC PACKAGING CONTINUED...



Creating a circular economy for flexible plastic packaging will require innovation and investment. We must focus efforts in:

- Designing packaging that can be recycled and sorted.
- In the short term, increasing the number of front of store (FOS) collection points provided by many supermarkets.
- In the long term, implementing collection at kerbside in all local authority areas.
- Investing in sorting and reprocessing capacity and capabilities.
- Ensuring recycled flexible plastic packaging has strong and stable end markets.

A strategy, that aligns with the **European programme Circular Economy for Flexible Packaging (CEFLEX)**, has been developed that spans these areas and this roadmap sets out the high-level actions to be taken in order to meet the challenges.

We are still developing a recycling system for flexible plastic packaging and many challenges lie ahead, but work is underway to address this urgent issue.

Table one highlights the composition (in 2022) of UK plastic packaging that is placed on the market. It shows where film (flexible plastic packaging) sits in the overall composition.

Table 1: Consumer Plastic Packaging by Format and Polymer, 2022 (k tonnes)

	HDPE	LDPE	PE	PET	PP	PS	PVC	OTHER	Grand total	
Bottle	148	1	1	338	4	0	0	0	493	39%
Film	9	79	41	31	98	0	1	78	336	27%
Other	9	4	6	23	44	13	1	9	109	9%
Pots, tubs and trays (PTTs)	1	0	1	218	92	12	0	4	329	26%
Grand total	168	84	49	610	237	26	3	91	1267	
	13%	7%	4%	48%	19%	2.2%	0.2%	7%		

FLEXIBLE PLASTIC PACKAGING ROADMAP

PROGRESS AND ACTIVITY



Since the initial publication of The UK Plastics Pact's roadmap to creating a circular economy for flexible plastic packaging, the world has faced unprecedented challenges. Businesses have had to learn to operate in a new way and consumers have been forced to think about how we use flexible plastic packaging to minimise our contact.

Despite this, The UK Plastics Pact has made significant steps within the roadmap. Progress against the targets is detailed in our [2022/23 Annual Report](#).

Design

- ✓ WRAP fed into the [CEFLEX Designing for a Circular Economy \(D4ACE\) guidelines](#).
Various complexities with the testing program lead to delays of much of the phase 2 testing for the D4ACE guidance. WRAP are working closely with CEFLEX to ensure that this is completed as swiftly as possible.
- ✓ Members have been reviewing their flexible plastic packaging portfolios and are now in the process of moving into mono-material polyolefin-based packaging. A number of case studies are outlined in our [2022/23 annual report](#).

Collections & communication

- ✓ WRAP undertook citizen insights work to identify the [most effective messaging terminology](#) when talking to citizens, with 'plastic bags and wrapping' being seen as clearest and easiest to understand.
- ✓ Grocery retailers have provided location data for over 6,200 front of store collection points and are live on the [Recycle Now Locator](#). Usage of these points has increased by 54% since 2021.
- ✓ Front of store recycling [guidance](#) for retailers has been produced, targeting an 'all flexible plastic packaging' collection.
- ✓ OPRL now instruct citizens to take PE and PP films to front of store collections points.
- ✓ WRAP alongside its partners in the FPF FlexCollect project have started trial collection of plastic bags and wrapping at the kerbside, with the [interim report](#) published in January 2024.
- ✓ Government have outlined plans under 'simpler recycling' for PE and PP films to be collected at all households by March 2027.

Sorting, processing & end markets

- ✓ WRAP [published its position](#) on non-mechanical recycling, outlining why we need the technologies and the impacts they can have.
- ✓ [A overview](#) on non-mechanical recycling has been updated to help members and industry better understand the opportunities and challenges for the technologies to have a significant impact on UK Recycling infrastructure.
Members continue to specify recycled content in their packaging, helping to stimulate collections and end markets for flexible plastic packaging.
- ✓ The End Market group has produced a report identifying key opportunities for flexible plastic packaging end markets as well as case studies from members.
- ✓ Waste management companies and recyclers are continuing to identify investment opportunities with a number of public announcements made over the past 12 months.
- ✓ Cross supply chain partnerships within The UK Plastics Pact have demonstrated new innovative end markets.

VALUE CHAIN ACTION



DESIGN

COLLECTIONS & COMMUNICATIONS

SORTING, PROCESSING & END MARKETS

FLEXIBLE PLASTIC PACKAGING ROADMAP DESIGN



OBJECTIVE

For all flexible plastic packaging to be designed for mechanical recycling where functionality can be achieved, otherwise for packaging to be compatible with non-mechanical recycling.

DECEMBER 2023

UK Plastic Pact members to have carried out a review of their flexible packaging and now actively making changes towards mono-material polyolefin-based packaging (in alignment with CEFLEX guidelines).

APRIL 2024

WRAP support CEFLEX on D4ACE Phase 2.

OCTOBER 2024

WRAP to review and update, where appropriate, the compostables usage guidance document.

THROUGHOUT 2024

CEFLEX D4ACE Phase 2 to be completed and incorporated into published guidelines.

OUTCOME

By the end of 2025, all Pact members to have aligned their flexible plastic packaging portfolios to industry agreed guidelines.



OCTOBER 2023

First EPR data submission.

SPRING - SUMMER 2024

Notification of which materials will be subject to modulation in 2026/27.

JULY - SEPTEMBER 2024

Recyclability Assessment Methodology (RAM) available for use.

JANUARY 2025

Eco-modulation reporting starts.

Dates relating to the implementation of government policy and legislation are correct at time of publication but may be subject to change.

FLEXIBLE PLASTIC PACKAGING ROADMAP

COLLECTIONS & COMMUNICATIONS



OBJECTIVES

All plastic packaging collected for recycling. Establish and publicise consistent front of store (FOS) collection points for all flexible packaging from supermarkets as an interim solution.

MARCH 2022

ERP Consultation response outlines Film and Flexible packaging to be collected at the kerbside by March 2027.

NOVEMBER 2023

Defra release 'Simpler Recycling' policy.

ONGOING

Supermarkets to provide WRAP with data on the location of FOS collection points for input into the Recycle Now recycling locator.

Collaboration between OPRL and The UK Plastics Pact to align design guidance and on pack labelling.

MARCH 2027

Mandatory collections of films & flexibles at the kerbside.

OUTCOME

All householders to have access to, and widespread use of flexible plastic packaging recycling facilities.

OCTOBER 2022

FPF FlexCollect trials started.

JANUARY 2024

FPF FlexCollect Interim Report published.

JANUARY 2024

All mono PP and mixed polyolefin flexible packaging to be labelled to take to FOS collection points.

AUGUST 2024

Front of store collections guidance to be reviewed and updated.

SUMMER 2025

Final report for the FPF FlexCollect trials to be published.

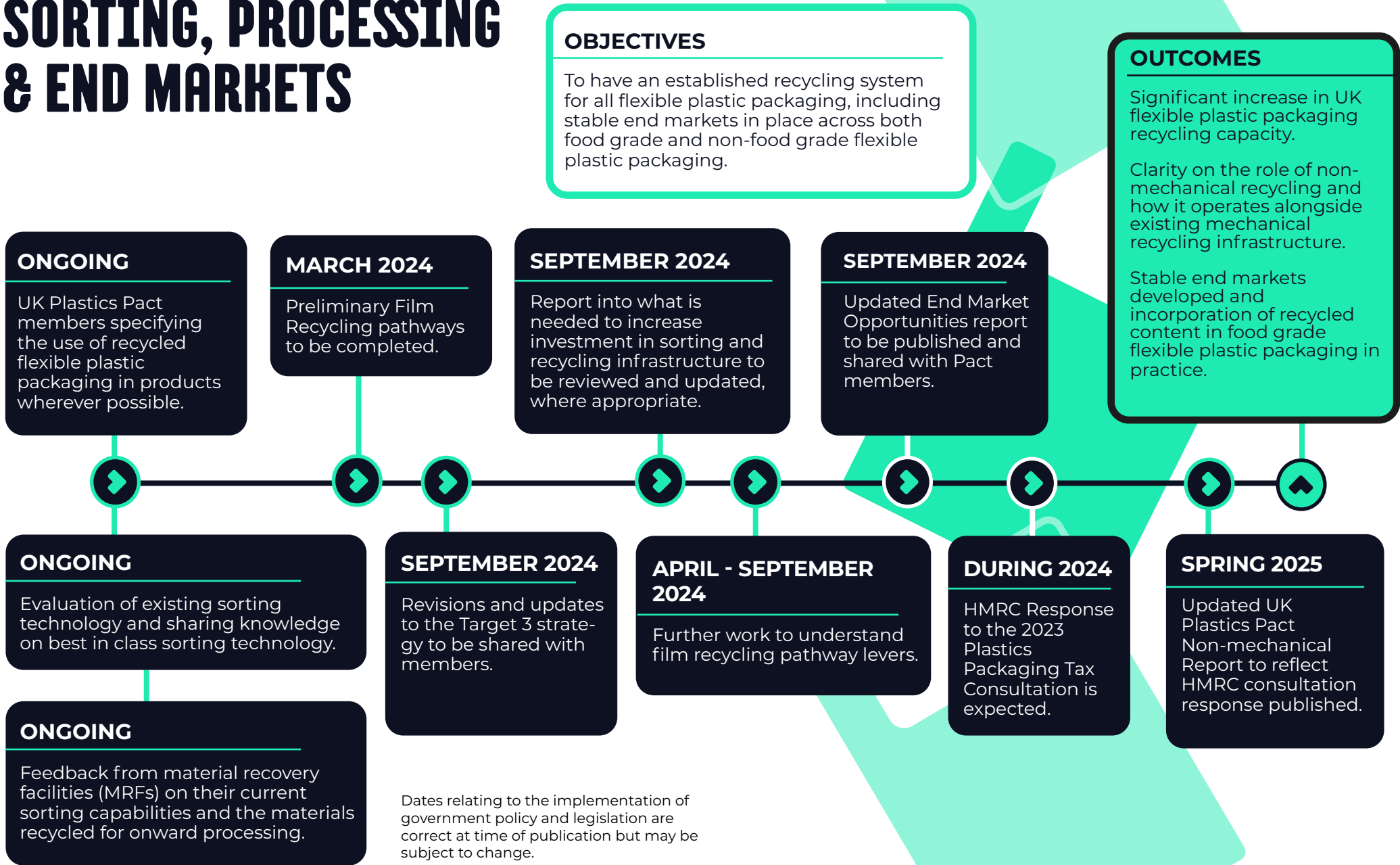
1ST APRIL 2027

Mandatory recycling labels on all flexible packaging.

Dates relating to the implementation of government policy and legislation are correct at time of publication but may be subject to change.

FLEXIBLE PLASTIC PACKAGING ROADMAP

SORTING, PROCESSING & END MARKETS



KEY TAKEAWAYS

Flexible plastic packaging is lightweight and often protects against food waste, however, with such a low recycling rate of 7% there needs to be a radical change across the value chain to achieve at scale recycling of flexible plastic packaging.

“The system for handling flexible plastic packaging is failing. It is imperative that we design out unneeded plastic film and address the fundamental economics of recycling the film required through innovation and automation. Doing nothing is not an option.”

Seb Munden, Chair, WRAP

The key takeaways for the supply chain are:

- As far as possible flexible packaging needs to be designed to use mono-material polyolefins, if it is to be recycled using existing infrastructure.
- Collecting flexible plastic packaging in the longer term needs to happen directly from households in order to capture the maximum amount of material. The timing of this is dependent on the outcome of ongoing government consultation.
- There is an existing network of collection points at supermarkets with a plan for the number of collection points to increase, with all adopting a consistent approach to accepting all types of bags and wrapping.
- In 2023 one in five (20%) UK citizens recycle plastic bags and wrapping items front of store, increasing by over 50% since 2021.
- Non-mechanical recycling will be required to enable recycled plastic to be used in food contact flexible plastic packaging.
- More end markets outside food packaging will be required.
- The FPF FlexCollect Project will continue to work to understand and implement the best methods to collect and sort flexible plastic packaging from the kerbside.
- Significant investment in flexible plastic packaging recycling infrastructure is needed.
- Collaboration is key, the whole value chain needs to take action.

THANK YOU

To get in touch with WRAP about The UK Plastics Pact you can contact us in a variety of ways:

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Our mission is to accelerate the move to a sustainable resource-efficient economy through re-inventing how we design, produce and sell products; re-thinking how we use and consume products; and re-defining what is possible through re-use and recycling.

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The UK Plastics Pact is led by WRAP with the support of the Ellen MacArthur Foundation. The UK Plastics Pact was co-created by the Ellen MacArthur Foundation and WRAP to accelerate the transition to a circular economy for plastics in the UK and is one of the Ellen MacArthur Foundation's national and regional implementation initiatives around the world. The opinions expressed, and materials made available, by WRAP or the Ellen MacArthur Foundation or The UK Plastics Pact signatories do not necessarily reflect the views of the other parties who are not responsible for the same.