



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

THE GLOBAL COMMITMENT FIVE YEARS IN:

LEARNINGS TO ACCELERATE
TOWARDS A FUTURE WITHOUT
PLASTIC WASTE OR POLLUTION



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ABOUT THIS PAPER

This paper is written for business leaders, policymakers, and negotiators of the international legally binding instrument on plastic pollution.

It aims to contribute to the global debate on plastic waste and pollution by surfacing the learnings from the first five years of the Global Commitment – the largest global voluntary effort to tackle plastic waste and pollution – and, based on those, provide direction for the coming years to drive progress further, faster.

Now is the right time to reflect upon progress to date. With only two years to go, the development of the Global Commitment beyond 2025 is about to start – and will be informed by all the lessons learned thus far. Highlighting these learnings now also ensures they can play an important role in informing the negotiations for the international legally binding instrument.

Specifically, this paper aims to answer the following questions:

- What is the Global Commitment, and what did it set out to do?
- Five years in, where has progress been made, and where is it lacking? What can be learnt from this?
- Looking ahead, what are the implications for (i) the international legally binding instrument and other policy efforts; (ii) voluntary business action; (iii) the role of voluntary initiatives vs binding regulations; (iv) the future of the Global Commitment itself?

This paper aims to find answers to these questions in solid, real-world data. It therefore focuses its exploration on areas for which a strong, multi-year, Global Commitment fact base is available. The authors recognise this means some elements of significant relevance to the global plastics debate are not covered in this paper in depth. In particular:

- The link between plastics and human health is an important topic on which the evidence base is fast increasing. However, as it has not been part of the Global Commitment's metrics, it is not discussed within this paper.
- The Global Commitment, and hence this paper, focuses on plastic packaging, not on all plastics applications.

- This paper mainly focuses on the quantitative results of the Global Commitment's business signatories, as the stakeholder group for which a four-year time series of quantitative data is available for a critical mass of signatories. The paper does reflect on the role of governments and policy, but at a higher level.
- Based on the learnings from the last five years, this paper provides broad potential focus areas for the international legally binding instrument and the next phase of the Global Commitment. However, it does not lay out detailed action plans, specific future targets, or policy recommendations.
- The Global Commitment is an important pillar of the Ellen MacArthur Foundation's and the UN Environment Programme's (UNEP's) work on plastics, but not the sole effort on plastics of these two organisations, let alone in the global landscape of action. While acknowledging the importance of these other efforts, this paper specifically bases its findings on data and insights from the Global Commitment.



2019



2020



2021



2022



2023

EXECUTIVE SUMMARY

In 2016, the Ellen MacArthur Foundation shocked the world with the prospect of a future in which there could be more plastic than fish in the ocean. Through this analysis, and the critical work of many other organisations, the enormity of the plastic pollution problem became apparent and a global debate ignited.

Two years later, the Global Commitment was launched, quickly becoming the biggest global voluntary effort to tackle plastic waste and pollution.

It was conceived by the Ellen MacArthur Foundation and UN Environment Programme, along with key stakeholders, as an early attempt at a globally coordinated response to the problem. At a time of limited and fragmented action on the topic, it marked a moment in which a group of leaders came together with the intent to drive action and lay critical foundations for systems change.

Over 1,000 organisations from across the world, including businesses representing 20% of all plastic packaging used globally and 55 government signatories, have since mobilised behind the Global Commitment's [common vision](#) to stop plastic packaging becoming waste. It is a vision of a circular economy in which we eliminate the plastic we don't need; innovate towards new materials and business models; and circulate all the plastic we still use. In joining, signatories took a leap of faith by signing up to ambitious 2025 targets. They then collectively committed more than USD 10 billion towards meeting those goals.

Over the last five years, Global Commitment business signatories have significantly outperformed their peers in tackling plastic waste, showing that a concerted effort can unlock change. They have reduced their use of several plastic items commonly identified as problematic or avoidable; stabilised their use of virgin plastics – avoiding nearly three million tonnes of virgin plastics production a year compared to business as usual; and more than doubled their share of recycled content.¹ The latter achievement is avoiding more than two million tonnes of greenhouse gas emissions per year and keeping one barrel of oil in the ground every two seconds.

The Global Commitment has also catalysed change far beyond its signatory group. It has done so by creating broad alignment on the vision, providing unprecedented transparency, revealing barriers, and laying the foundations for the Business Coalition for a Global Plastics Treaty as well as for 11 national and regional Plastics Pacts.

At the same time, with a large part of industry not yet taking action, and signatories likely to miss key 2025 targets, the world is off track to eliminate plastic waste and pollution. Currently, 80% of the global plastic packaging market is not covered by the Global Commitment and performing, on average, much worse than the 20% who have signed up. Also within the signatory group, there is significant variation in performance. And, just as it is important to acknowledge the progress made, it is important

to acknowledge that the Global Commitment and its signatories will likely not realise all the 2025 ambitions they set out with. Transparency has always been a key component of the Global Commitment. In a world that is still awash with plastic waste and pollution, posing a threat to nature, climate, and human health – it is imperative that we learn both from the progress made and where it is lacking, so that we can move forward at pace.

The learnings so far reinforce the need for more, and more ambitious, binding policy measures, as well as accelerated voluntary business action.

This cannot be an either-or: both are crucial to tackling plastic waste and pollution at the pace and scale required.

The international legally binding instrument on plastic pollution presents a once-in-a-generation opportunity to meet the scale of the challenge and accelerate global change. It is the best prospect for rapid and systemic worldwide impact. By putting in place legally binding global rules and measures, an international legally binding instrument can ensure that all countries act in concert to unlock circular economy solutions to end plastic pollution. In parallel to the negotiation of the instrument, governments should also ramp up the implementation of effective regulations in their own jurisdictions.

Voluntary business action that complements long-term policy change will also remain vital to push progress further, faster.

Regulation will not solve everything, given the highly complex nature of the plastic and packaging waste and pollution issue. Voluntary business action will continue to play a crucial role in innovating, showing what's possible, and creating demand for solutions. The past five years have proven that committed businesses can make a meaningful difference and that the vast majority of businesses can do more than they are doing today. Waiting for regulation cannot be an excuse for inaction – and companies leading the way will reap the rewards. Equally, businesses need not wait for regulation to enable change, but can play an active role in advocating for it.

Based on the insights from the last five years, we call on policymakers, negotiators of the international legally binding instrument, and businesses, to:

(1) Replicate, scale, and mandate the solutions that industry leaders have already compellingly demonstrated are possible. Limiting virgin plastics use, eliminating problematic and avoidable plastic items, and increasing recycled content are all areas where Global Commitment business signatories have shown significant progress is possible, but where the market as a whole is lagging behind. Therefore, policymakers have an opportunity to accelerate the shift by creating a higher level playing field where the entire industry advances in these areas. In parallel, businesses should further scale these solutions to accelerate the progress needed and as such stay ahead of regulation and respond to increasing shareholder and customer pressure.

(2) Overcome, through concerted policy and business action, three pivotal hurdles currently blocking progress: scaling reuse, flexible plastic packaging in high-leakage countries, and lack of infrastructure to collect and circulate packaging. Over the last five years, it has become clear that even industry leaders have made limited progress in these areas. Overcoming these pivotal hurdles is critical – otherwise, progress will simply plateau long before coming close to solving plastic waste and pollution. To do so, bold policy interventions and business innovation will be needed.

Looking ahead, the Global Commitment will continue to serve as a key force in driving voluntary action and openly sharing both successes and obstacles with the world to inform and complement the international legally binding instrument. We will, together with signatories and stakeholders, chart a path for the Global Commitment beyond 2025, evolving it based on the learnings we now have, for maximum impact towards 2030.

We know there is still much work to be done, and we need to move faster, however the foundations laid in the last five years give us hope. It will be hard, but we forge ahead – together – with much more clarity on what needs to be done and committed to the vision of a world in which plastic never becomes waste or pollution.

THE GLOBAL COMMITMENT HAS SHOWN
IT'S POSSIBLE TO MAKE MEANINGFUL
PROGRESS IN TACKLING PLASTIC WASTE
AND POLLUTION. EQUALLY IT IS CLEAR THAT
THE WORLD REMAINS OFF TRACK. USING
THE LEARNINGS OF THE LAST FIVE YEARS
TO DRIVE MORE AMBITIOUS POLICY AND
GREATER BUSINESS ACTION, WE CAN NOW
ACCELERATE CHANGE, **TOGETHER.**

1 INTRODUCTION



A PLASTIC POLLUTION CRISIS

In 2016, the world was shocked by the prospect of a future in which there could be more plastic than fish in the ocean.² At the time, the true extent and implications of plastic waste and pollution were not well understood and there was no consensus view on how to tackle it at scale. The world had become reliant on plastic, at the same time as being overwhelmed by it.

Since then, given the continued exponential growth of plastics production, the situation has become worse in many ways. There are now more single-use plastics than ever before. The vast majority of plastic is fossil-fuel derived, and greenhouse gas emissions from plastic production are expected to more than double by 2060.³ Plastic is everywhere – in every country and continent – it's floating in our rivers, littering our streets, invading our most precious wild spaces, and even entering our bodies. It shouldn't be there, and it doesn't have to be.

However, since 2016, a parallel story has emerged – one of a rapid build-up of action, at a pace that has rarely been seen before. In less than a decade, plastic pollution has evolved from a fringe topic to one that is discussed fervently in corporate boardrooms and capital cities around the world. Billions of dollars have been mobilised, hundreds of companies are tackling the issue, and an international legally binding instrument on plastic pollution is now being negotiated.

THE GLOBAL COMMITMENT

The idea of the Global Commitment was conceived in 2017, at a time when global industry and government action on plastic pollution was fragmented and limited. There were virtually no major companies with comprehensive strategies to address their plastics footprint, and the prospect of an international legally binding instrument was very far off.

With the launch of the Global Commitment at the Our Ocean conference in Bali in 2018, a pioneering group of leading companies, governments, and other stakeholders took a leap of faith to tackle the problem, at a time when the solutions were not yet fully known. Business signatories stepped forward and agreed to work towards a comprehensive set of targets on a scale that virtually no company had committed to before, and to offer an unprecedented level of public transparency over their efforts.



Before the Global Commitment, there was no industry-wide vision of where to go and how to get there, as we'd never really all sat down and had those discussions about what it would really mean. This changed dramatically when the Global Commitment started. Some major companies had plans for sustainability and circularity, but for the first time, there was a common way to talk about the issues instead of individual endeavours. As soon as we, signatories of the Global Commitment, set time-bound commitments, everyone could feel part of that delivery roadmap. All markets and geographies were impacted – and we had to completely adjust our internal governance structure. It created a cultural shift. That energy has carried through all five years, and is still very present today in our organisation.



Philippe Bonningue, L'Oréal

The intent was to drive initial action and be a building block towards systems change. Specifically, the Global Commitment set out with four key objectives:

MOBILISE

DELIVER

LEARN

CATALYSE

MOBILISE a group of leading companies, governments, and other stakeholders to build alignment behind a common vision and targets.

MOBILISE

CATALYSE change in the entire plastics economy by creating a ripple effect far beyond the signatory group itself.

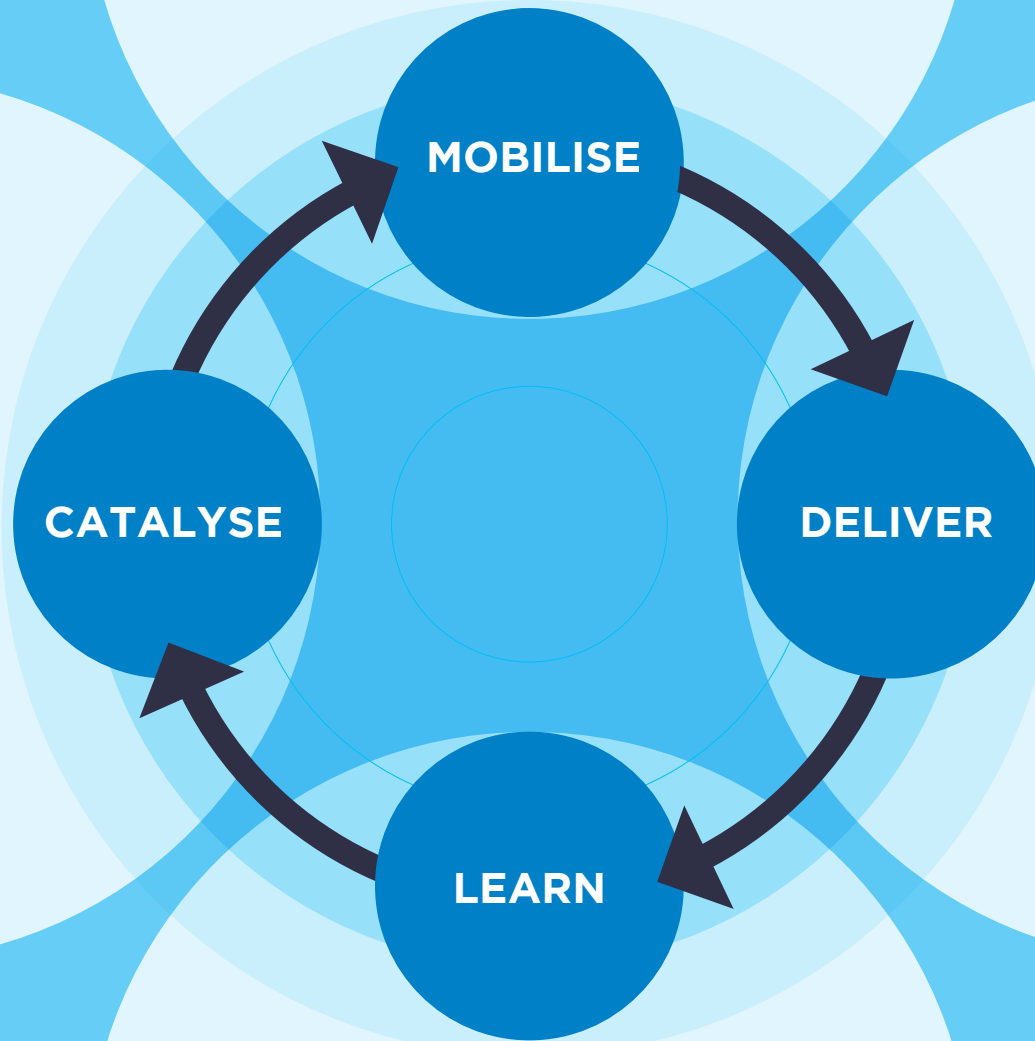
CATALYSE

DELIVER initial action towards the common vision, demonstrating where progress is possible and revealing where it is lacking.

DELIVER

LEARN

LEARN by providing unprecedented transparency about the key opportunities and barriers, and, for the first time, exploring solutions with a critical mass of players.



EXPLAINER: WHAT IS THE GLOBAL COMMITMENT?

Launched in October 2018 by the Ellen MacArthur Foundation, in collaboration with the UN Environment Programme, the Global Commitment unites businesses, governments, NGOs, and investors behind a common vision of a circular economy in which we eliminate the plastic we don't need; innovate towards new materials and business models; and circulate all the plastic we still use, to keep it in the economy and out of the environment.

To help make this vision a reality, all business and government signatories of the Global Commitment set ambitious 2025 targets and publicly report progress every year. These targets are specific to each step of the value chain. For example:

Brands, retailers, and packaging manufacturers set the following targets:

- Ensure 100% of plastic packaging is reusable, recyclable, or compostable by 2025 (with guidance that compostable plastic packaging is not a blanket solution, but rather one for specific, targeted applications)
- Increase the share of post-consumer recycled (PCR) content across all plastic packaging used (each company sets its own target, with the weighted average being 26% by 2025)
- Decrease the use of virgin plastic in packaging (target added in 2021 for brands and retailers only, each company sets its own target, with the weighted average being 18% virgin reduction by 2025)
- Take action to move from single-use towards reuse models, where relevant (qualitative target)
- Eliminate problematic or unnecessary plastic packaging (qualitative target)

Plastic manufacturers and recyclers committed to increasing the amount of recycled plastics they produce and sell.

Government signatories committed to make progress in these same areas as well as in increasing effective reuse and recycling rates.

The Global Commitment also set out to create an unprecedented level of transparency by agreeing on a common set of definitions, the publication of targets online, and annual public reporting on progress.

This paper mainly focuses on the results of the Global Commitment's business signatories, as the group for which a four-year time series of quantitative data is available for a critical mass of signatories.



Global
Commitment



2 THE LAST FIVE YEARS: PROGRESS AND LEARNINGS

This section provides an overview of progress made across the Global Commitment's four objectives: mobilise a group of signatories; deliver initial progress; learn about opportunities and barriers to scaling solutions; and catalyse change beyond the signatory group.

1,000+
organisations
united behind
a common
vision

**\$10+
billion**
invested by
signatories

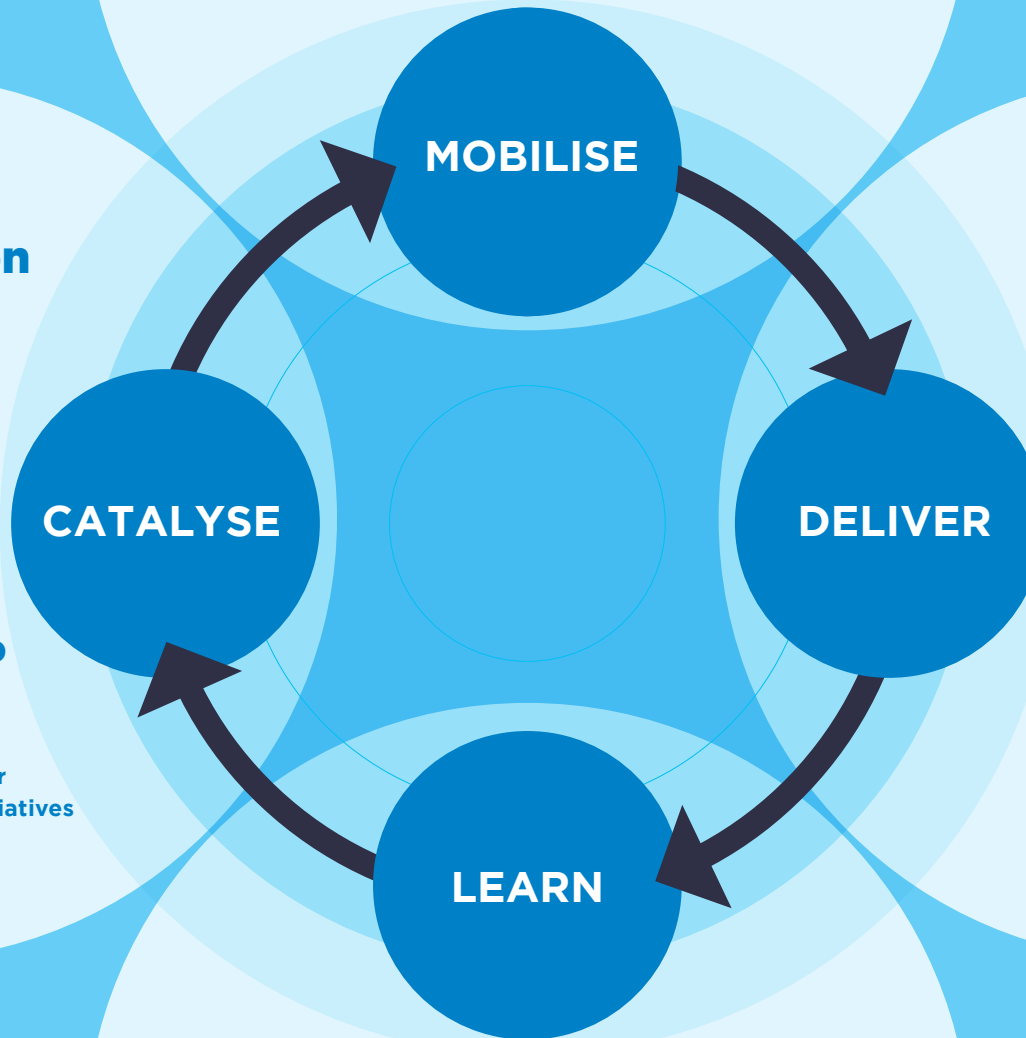
100+
businesses with
dedicated teams
working on packaging
solutions

Provided foundation for the
**Business Coalition
for a Global
Plastics Treaty**

11 Plastics Pacts
working towards the same vision
and aligned targets

Global Commitment
**reporting being
extended by CDP**
to thousands of companies

Informed policy, investor
engagement, and many other initiatives



Signatories significantly
outperformed
their peers

More than **doubled
recycled content**,
equivalent to keeping 1 barrel of oil
in the ground every 2 seconds

**Avoided
2.8 million tonnes
of virgin plastic per
year**, equivalent to more than the
UK's annual plastic packaging use

**Stabilised virgin
plastics use**, while
market as a whole grew 11%

**Unprecedented
transparency**
through public reporting,
with common definitions

**Three
pivotal hurdles**
to driving further progress
are now clear

MOBILISE: 1,000+ SIGNATORIES UNITING BEHIND A COMMON VISION

The Global Commitment has mobilised over 1,000 organisations behind a common vision and aligned 2025 targets, underpinned by common metrics and definitions. This group includes:

- **250+ businesses** representing 20% of all plastic packaging globally, across the value chain and the world (the majority of business signatories are active across four or more continents)
- **55 governments**⁴ representing over 1 billion people, across five continents
- **200+ endorsing signatories**, including 27 financial institutions with a combined USD 4 trillion of assets under management; leading institutions such as the Consumer Goods Forum, the International Union for Conservation of Nature (IUCN), National Geographic, Systemiq, the Waste and Resources Action Programme (WRAP), the World Economic Forum, and World Wide Fund for Nature (WWF); and 50 academics, universities, and other educational and research organisations
- **800+ organisations** that are members of one or more of the 11 Plastics Pacts around the world, which are all working towards the same common vision and aligned 2025 targets.

In turn, signatories mobilised significant efforts within their organisations. Collectively they committed over USD 10 billion investments,⁵ developed plans and strategies, and formed or

expanded dedicated packaging teams. Companies like Mars, Incorporated and The Coca-Cola Company linked executive remuneration to the progress made towards certain Global Commitment targets. Many have collaborated more closely across the value chain, enabled by a critical mass of their peers, suppliers, and customers being committed to the same vision and targets, and using the same language and definitions.

Having worked in the business of waste for several decades, I have seen how the launch of the Global Commitment has boosted the momentum and action across the industry on addressing plastic waste and pollution all around the world. In particular, the 2025 recycled content targets created a lot of demand from brands reaching out to us to supply them with recycled materials. However, price remains a significant barrier for many businesses. Therefore we need to see policies that level the playing field between virgin and recycled materials, such as stopping fossil fuel subsidies, pricing the greenhouse gas emissions benefits of recycled materials, and EPR (Extended Producer Responsibility) to fund collection.

**Surendra Patawari, Founder and Chairman,
Gemini Corporation NV**

Rwanda was one of the first countries in the world to ban single-use plastic bags in 2008, and we have since banned all single-use plastic products. Since joining the Global Commitment, as one of its first government signatories, we have been inspired to go beyond bans and take action across the plastics life cycle. For instance, we have encouraged all public institutions and hotels to shift to reusable options for drinking water, strengthened collaboration with the private sector through a plastic collection scheme and have begun discussions to establish an Extended Producer Responsibility scheme. We had this systems based approach in mind when, together with Peru, we put forward the proposed resolution that resulted in the ongoing negotiations for an international legally binding instrument on plastic pollution, and Rwanda is committed to taking ambitious actions through the Global Commitment while negotiations are ongoing. We are encouraged by the steps taken by other nations, and welcome more partners to join us in the effort to end plastic pollution by 2040.

**Dr Jeanne d'Arc Mujawamariya, Minister of
Environment, Rwanda**

DELIVER: DEMONSTRATING THAT PROGRESS IS POSSIBLE AND REVEALING WHERE IT'S LACKING

Global Commitment business signatories have outperformed the global market in nearly all target areas where comparable data exists, showing that a concerted effort can unlock change (see [Figure A](#)):

- The strong growth in recycled plastics use, combined with keeping the overall growth in plastic packaging use below market average, has enabled the group of brand and retail signatories to roughly stabilise its **virgin plastics use** since 2018. This is in strong contrast to an increase in virgin plastic use of 11% for the plastic packaging market as a whole over that same time period.
- The signatory group has significantly reduced the use of some **packaging items and materials commonly identified as problematic or unnecessary**, for example reducing EPS packaging by 36% from 2020 to 2022. This stands in contrast to the global market, which has seen a more than 3% increase in the use of EPS packaging during the same period. Other examples of plastic packaging items and materials commonly identified as problematic or unnecessary by the signatories include single-use plastic carrier bags, straws, cutlery and hangers, and PVC, PVCD, and undetectable carbon black.
- The increase in **recycled content** is an area where the signatories have particularly proven change at scale is possible. Brand and retail signatories more than doubled the share of post-consumer recycled (PCR) content in their plastic packaging from ~4.7% in 2018 to ~11.7% in 2022, compared to a mere 1 percentage point increase in the global market as a whole.
- The target of **100% reusable, recyclable, or compostable 'in practice and at scale'** is one where the market as a whole, including the signatories, have made more limited progress over the last five years. Pivotal hurdles preventing progress in this area are explored in [Chapter 3](#). Due to the Global Commitment's specific definition of 'recyclability in practice and at scale', there is no robust data available to compare the global market with the signatory group. While there are indications that the signatory group may be outperforming the market, there is no robust data available to validate this. These indications include outperformance on the elimination of non-recyclable items such as EPS and PVC, and signatories' substantial investments in technical recyclability, such as Mars, Incorporated's USD hundreds of millions invested to redesign their packaging portfolio, making 8,000 packaging components technically recyclable or compostable, or Walmart increasing its share of technically recyclable packaging from 53% to 80%. Across all brand and retailer signatories, 82% of plastic packaging is now technically recyclable.⁶
- The target to move from single-use towards **reuse** is another one where the market as a whole, including the signatories, have made limited progress over the last five years. Pivotal hurdles preventing progress in this area are explored in [Chapter 3](#). There is no robust data available to compare the global market with the signatory group. Signatories have conducted a significant number of reuse pilots, yet the overall share of reusable plastic packaging has remained roughly stable.
- The **production of recycled plastics from recyclers** signed up to the Global Commitment has increased by 90%, far more than the ~25% increase for the market as a whole.
- In addition, the two Global Commitment plastic producer signatories that were given a 'Circularity Score' by the Minderoo Foundation **ranked 2nd and 3rd** for their progress and ambitions towards circularity, out of the top 100 single-use plastic producers globally.⁷

The best performing business signatories have demonstrated it's possible to go even further.

The top quartile brands and retailers group, for example, has:

- Reduced its **virgin plastics** use by 13% on average (compared to a 0.2% reduction for the group as a whole). Companies in this list include Henkel, Nestlé, Schwarz Group, and Unilever.
- Increased its share of **recycled content** by more than 19 percentage points on average (compared to 7 percentage points for the group as a whole). Major businesses in this group include: Keurig Dr Pepper, L'Oréal, SC Johnson, Schwarz Group, and Unilever.
- Eliminated on average 100% and 92%, respectively, of the **EPS and PVC packaging** it was using in 2020. Major companies in this category include Colgate-Palmolive, Jeronimo Martins, and Starbucks Coffee Company.

These pioneering efforts are within touching distance of the 2025 targets and show that ambition can yield results, despite the barriers the group and market as a whole are facing.

FIGURE A

Global Commitment business signatories, and particularly the top quartile, have outperformed the market across nearly all target areas where comparable data exists, even if not all targets will be met

Target areas (brands and retailers)	2022			2025
	Global Market	Global Commitment signatories ^{8,10}	Top quartile Global Commitment signatories ⁸	Global Commitment target
Decrease the use of virgin plastic (% change by weight vs 2018)	+11% ^{1,2}	-0.1%	-13%	-18% ⁴
Eliminate problematic or unnecessary packaging³ <i>Illustrative examples</i> > EPS packaging use ^{6,9,10} (% change by weight vs 2020)	+3% ¹	-36%	-100%	-100% ³
> PVC packaging use (% change by weight vs 2020) ⁹	+3% ¹	-8%	-92%	-100% ³
Move from single-use towards reuse (Change vs 2018)	Roughly flat	Roughly flat	Minor increase	Increase
Ensure 100% of plastic packaging is reusable, recyclable, or compostable⁵ (percentage point change vs 2018)	n/a ⁷	+2pp	+12pp	+37pp ⁴ (to 100%)
Increase the share of post-consumer recycled content (percentage point change vs 2018)	+1pp ^{1,2}	+7pp	+19pp	+21pp ⁴ (to 26%)
Increase the production of recycled plastics (in % increase vs 2018)	+25% ²	+90%	+110%	+290% ⁴

1 Source: WoodMacKenzie market data

2 Source: Charles D & Kimman L, Minderoo Foundation, Plastic Waste Makers Index (2023)

3 In full: packaging items and materials commonly identified as problematic or unnecessary. These are items and materials that a significant number of signatories have identified as problematic or unnecessary, based on the Global Commitment's criteria defining 'problematic or unnecessary'.

4 Calculated based on the weighted average of the signatories' individual targets

5 Metric is significantly influenced by portfolio composition

6 Excluded from this assessment for the Global Commitment are EPS packaging used for insulation (e.g. fish boxes) or protecting large items (e.g. white goods or furniture)

7 The Global Commitment developed its own definition of 'recyclability', demanding 'recyclability in practice and at scale'. Therefore no comparable market data is available. While there are indications the

signatory group might be outperforming the market (e.g. signatories substantial investments in technical recyclability and outperformance on the elimination of non-recyclable items such as EPS), there is no robust data available to validate this.

8 Based on Global Commitment signatory data

9 Based on signatories who had this type of plastic packaging in their portfolio in 2020

10 As signatories who left the Global Commitment represent a negligible share of the total volumes (~1%), they are excluded from the analysis

As a result, through the Global Commitment, the business signatories have had a substantial collective material and climate impact. They have increased their use of recycled plastics by 1.5 million tonnes per annum. As the vast majority of virgin plastic is derived from fossil fuels, this is equivalent to keeping 1 barrel of oil in the ground every 2 seconds, or more than 15 million barrels of oil a year.⁸ Doing so also avoids 2.5 million tonnes of CO₂ per year – equivalent to eliminating the carbon emissions of a city of 500,000 people.⁹ The strong growth in recycled plastics use, combined with keeping the overall growth in plastic packaging use below market average, has resulted in avoiding 2.8 million tonnes of virgin plastics production a year compared to business as usual – equivalent to more than the UK’s annual plastic packaging use.

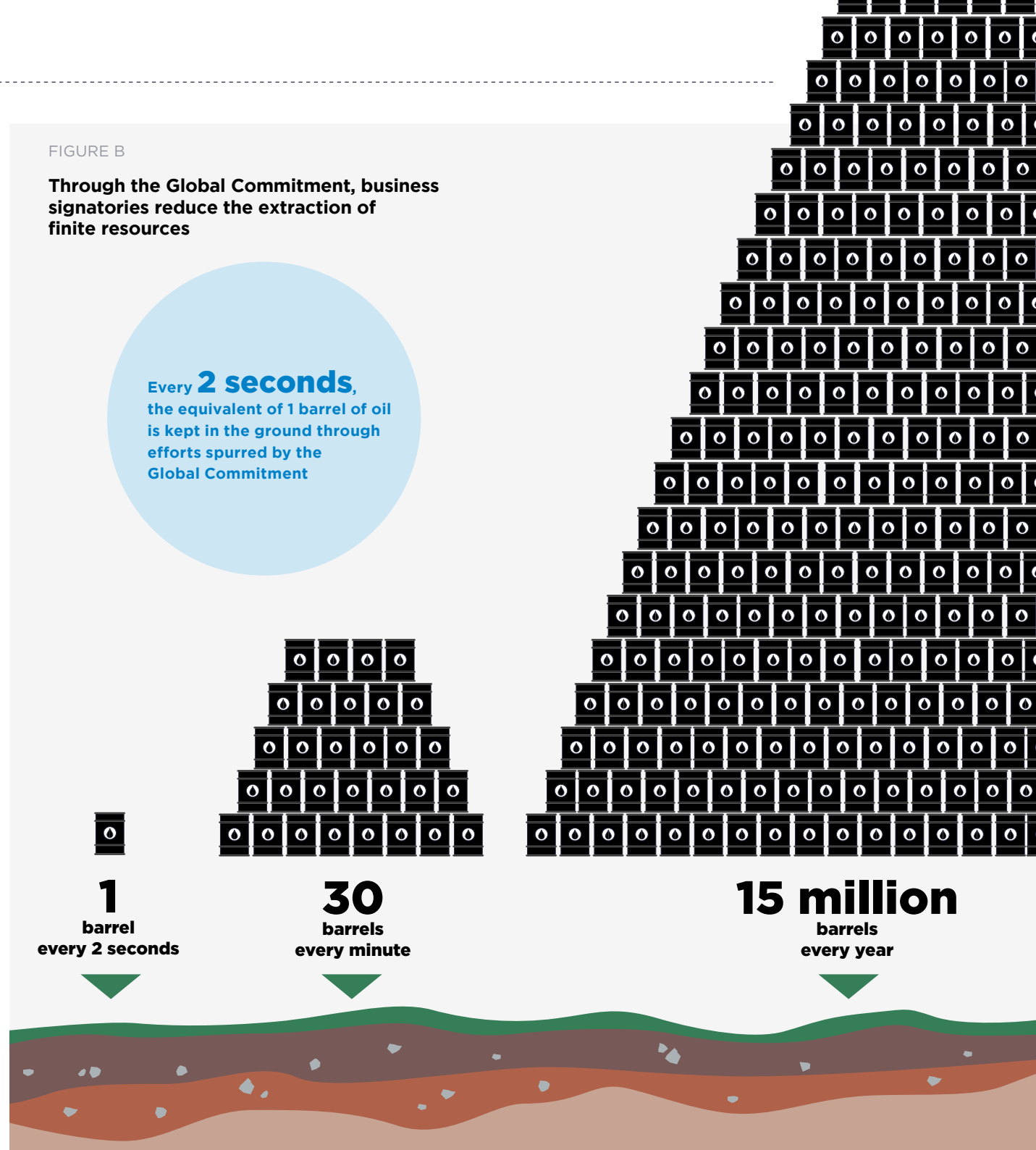
The Global Commitment matters because one company alone cannot solve this complex global problem. The Global Commitment has brought collaboration across the value chain. This effort needs to be done collectively, so it is a level playing field. Plus, the impact of one company vs working together on it, is much, much different as it sends a signal to the external stakeholders (e.g. policy makers, governments), and to those not signed up to the Global Commitment.

Jeanette Coombs, Danone

FIGURE B

Through the Global Commitment, business signatories reduce the extraction of finite resources

Every 2 seconds, the equivalent of 1 barrel of oil is kept in the ground through efforts spurred by the Global Commitment



At the same time, with a large part of the industry not yet taking action, and signatories likely to miss key 2025 targets, there is a long way to go to end plastic waste and pollution. While demonstrating progress is possible, the last five years have also revealed where progress is lacking. This plays out across three dimensions:

- Currently, 80% of the global plastic packaging market is not covered by the Global Commitment and performing, on average, much worse than the 20% who have signed up.
- Within all target areas, there is significant variation in performance within the signatory group, with not all signatories performing to the same level as top quartile leaders have shown is possible.
- Even top quartile signatories are expected to miss key 2025 targets, showing that more interventions are needed to realise our ambition.

A substantial leap forward could already be made if the entire industry replicated the advancements of the Global Commitment signatories. For example, if the entire plastics market had followed the example of the signatory group and stabilised its virgin plastics use at the 2018 level, virgin plastic production would be 10%, or 35 million tonnes,¹⁰ lower than it is today. As another example, packaging manufacturer signatories Amcor and Berry Global both report that many of their customers are yet to transition to the solutions they have available to enable the substitution of non-recyclable with recyclable packaging and to further increase recycled content use.

Accelerating action on these fronts will need to be complemented by overcoming three pivotal hurdles that are currently preventing progress. By working towards the targets, a lot has been learnt about what is preventing progress. Reflecting on those insights to inform the way forward is critical. After introducing some of the key learnings in the following section, their implications on the way forward is explored in depth in Chapters 3 and 4.

LEARN: PROVIDING UNPRECEDENTED TRANSPARENCY AND IDENTIFYING KEY BARRIERS

Before joining the Global Commitment, many businesses did not have a full view on how much plastic packaging they were putting on the market, of what types, how much was reusable or recyclable, or how much recycled content was used. For some of these terms there was not even a common definition.

The Global Commitment has provided unprecedented transparency on companies' plastic usage and progress towards targets. Today, an annual overview of plastic packaging footprint and progress is transparent and publicly available for Global Commitment business signatories, all underpinned by common definitions. All signatories are investing significant effort in reporting their progress every year. This transparency is crucial for signatories to take more informed and targeted actions, and is actively used by investors and other organisations to learn and hold signatories to account. This transparent reporting has also helped highlight what leading players have proven to be possible and what pivotal hurdles need to be overcome.

It has also provided transparency on those businesses who signed up but subsequently left the Global Commitment. Over the last five years, 20 businesses have left the signatory group. This was as a result of them not fulfilling – or being unwilling to fulfil – mandatory requirements for participation, which include setting quantitative targets in line with the Global Commitment framework and publicly reporting on progress on them annually through the

Ellen MacArthur Foundation, in line with the Global Commitment common definitions and guidelines. These businesses are: Barilla G. e R. Fratelli SpA, Burberry Group, Ltd., CuRe Technology, CarbonLITE recycling, Evertrak, Futamura Chemical Co., Ltd., Huidu environmental protection technology (Shanghai) Co., Ltd., Jiangxi Green Recycling Co., Ltd., Marks and Spencer plc, METRO AG, Multi-Color Corporation (MCC), Nuceria Group, Paccor, Re-Poly, QRS, Selfridges, Stanley Black & Decker, Suzhou Jiulong Recycling, Umincorp, and Vita BioEnergia Ltda.

With just two more years to go until 2025, and with much more data and knowledge, it is now clear where strong progress has been made, as well as which targets will be missed and why. The target of 100% reusable, recyclable, or compostable plastic packaging will almost certainly be missed by most organisations, with **flexible plastic packaging** and lack of **infrastructure** being the main barriers. The other area where – despite many pilots – progress at scale is lacking, is **reuse**, which impacts a range of targets, including that on virgin reduction.

The learnings from the last five years can inform the way forward. [Chapter 3](#) is dedicated to diving deeper into these three pivotal hurdles: scaling reuse, flexible packaging, and lack of infrastructure. It outlines why it is crucial to overcome them and offers a first, high-level indication of what needs to happen next.

We've all learned a huge amount about the plastic pollution crisis over the past five years – about its devastating impacts on our health, our wildlife, our communities, and how it is driving climate change. The Global Commitment has helped create transparency on progress and where it is lacking. Today, plastics use continues to rise and production is set to skyrocket. This review reveals that the current efforts and strategies being used to tackle the plastic crisis are not enough. We cannot recycle our way out of this problem. We urge all producers and users of plastic to commit to a new path where we reduce and reuse at scale, and to support a strong Global Plastics Treaty to underpin it.

Louise Edge, Greenpeace Campaign Strategist

When the Global Commitment launched five years ago, it quickly became the 'North Star' for addressing plastic pollution and sustainable packaging. It has helped to standardise uniform definitions and ambitions that have united businesses, governments, and NGOs in pursuit of solving a global challenge that demands multi-stakeholder solutions. The importance of creating this alignment cannot be overstated. It is important now that we take learnings from the past five years and chart a course that is both ambitious and grounded in reality, includes well-designed enabling policies, and leaves room for further innovation and evolution.

Anke Boykin, Senior Director Global Environmental Policy, PepsiCo

CATALYSE: CREATING A RIPPLE EFFECT FAR BEYOND THE SIGNATORY GROUP

The Global Commitment catalysed change far beyond its signatory group. Its common vision and common framework of targets, metrics, and definitions inspired, informed, and served as the foundation of many other efforts.

Having over 1,000 organisations all endorse one common vision was a very powerful step to create alignment on the direction of travel. While most elements of [this vision](#) have now become mainstream and widely endorsed and accepted by most stakeholders, back in 2018 it was a major step forward to create explicit alignment in direction on, for example:

- “Elimination of problematic or unnecessary plastic packaging [...] is a priority”
- “Reuse models are applied where relevant”
- “We cannot recycle our way out of the plastics issues we currently face”
- “Landfill, incineration, and waste-to-energy are not part of the circular economy”
- “All plastic packaging is reused, recycled, or composted in practice”
- “All plastic packaging is free of hazardous chemicals, and the health, safety, and rights of all people involved are respected”.

Alongside the Ellen MacArthur Foundation and the UN Environment Programme, those united behind the common vision include many of the leading

organisations on this topic, such as the Consumer Goods Forum, Systemiq, the World Economic Forum, WRAP, WWF, and many more.

Worldwide, 11 Plastics Pacts, and their 800+ members, are working towards the same common vision and aligned targets. These pacts have been mobilised by WRAP and the Ellen MacArthur Foundation and are run by local partners. Where the Global Commitment provides a global vision and direction, as well as common definitions and metrics, the Plastics Pacts drive on-the-ground action towards solutions tailored to the very different local contexts in each of their geographies.

The Global Commitment’s common framework of targets, metrics, and definitions has formed the explicit basis for a wide variety of other initiatives around the world, including: UN PRI’s [investor engagement guides](#) on plastics; the [Global Tourism Plastics Initiative](#); the Consumer Goods Forum’s [Plastic Waste Coalition of Action](#); and many more.

Currently, The Pew Charitable Trusts, Minderoo Foundation, and the Ellen MacArthur Foundation are partnering with CDP to expand its world leading global environmental disclosure system to plastics. Building on the pioneering work of the Global Commitment, this opens up the opportunity to expand public reporting on plastics from hundreds of Global Commitment signatories to thousands of companies already reporting via CDP on other environmental topics.

The Global Commitment has also informed and inspired policy, and corporate advocacy for more ambitious policy. One of the most direct and clear examples of informing policy is [Australia’s National Plastics Plan](#), the 2025 targets of which are all adopted from the Global Commitment and the local Plastics Pact. Following the Global Commitment’s 2020 annual progress report, which called out the vital role of EPR policy in scaling collection and recycling infrastructure, many Global Commitment signatories were among the 150 businesses and NGOs that signed a [public statement calling for the implementation of EPR](#) policy as a necessary part of the solution.

Finally, having such a large group of organisations aligned on a common vision was critical to the mobilisation of [The Business Coalition for a Global Plastics Treaty](#), which currently brings together 140+ businesses and financial institutions committed to supporting the development of an ambitious, effective, and legally binding instrument on plastic pollution. The coalition is convened by the Ellen MacArthur Foundation and WWF, in collaboration with aligned businesses, and supported by strategic NGO partners.

The Global Commitment has been a real pioneering effort, and the transparency and accountability it brings are critical. However, transparency cannot stop with a group of leading businesses only. That is why Minderoo Foundation is working with The Pew Charitable Trusts and the Ellen MacArthur Foundation towards expanding this to thousands of businesses via the CDP platform, and advocating for policy that mandates large businesses to report transparently on how they are performing in addressing plastic waste and pollution.

**Marcus Gover, Director - Plastics,
Minderoo Foundation**

Building on the common vision shared by the Global Commitment and other Plastics Pacts around the world, the South African Plastics Pact cultivated and guided collaboration locally between our members, representing 30% of all plastic packaging placed on the market in the country, as well as with policymakers. The members have prevented more than 100 million problematic plastic items from being placed on the market and increased recycled content from 21% in 2020 to 24% in 2022. We firmly believe in the value of a common direction and goals, and will soon introduce our targets beyond 2025, with a deliberate emphasis on the integration of the informal sector and considering the broader society.

Kirsten Barnes, South-Africa Plastics Pact

CONCLUSION

Significant progress has been made - even if not all targets will be met. Valuable lessons have been learned along the way. Nevertheless, it is important to acknowledge that the global community is still way off course in the pursuit of eradicating plastic waste and pollution.

Therefore, it is paramount that over the next years, policymakers, negotiators of the international legally binding instrument, and the Global Commitment itself build on these foundations - replicating the progress that leaders have demonstrated is possible, and overcoming pivotal hurdles that have stymied progress thus far.

3 THE LAST FIVE YEARS: A DEEP DIVE ON THREE PIVOTAL HURDLES

This chapter provides a more in-depth view on three pivotal hurdles currently preventing progress. These are crucial both to understand why progress in the Global Commitment has been slower in certain areas over the last five years, and to inform the direction going forward.

These hurdles, also briefly covered in [Chapter 2 - Learn](#), are: scaling reuse, flexible plastic packaging, and lack of infrastructure. All of these are vital to address in order to tackle plastic waste and pollution, and have been key barriers to progress in the last five years.

TAKING REUSE FROM NICHE TO SCALE



WHY THIS IS PIVOTAL

Moving from single-use to reuse models presents one of the biggest opportunities to reduce plastic pollution.¹¹ It is estimated that moving to reuse models can provide an over 20% reduction in total annual plastic leakage to the ocean by 2040.¹²

Reuse is crucial to reduce virgin plastics use, which in turn will be vital to stay within the carbon budget.

It is estimated that a 50% reduction of plastics production will be needed by 2050 to remain within a 1.5°C carbon budget.¹³ For plastic packaging, reuse is essential to get there, as all other virgin reduction pathways have limitations:

- While there is significant space for package-less innovations, there is a limit to how many products can be delivered without any form of packaging.
- The substitution of plastics by alternative materials often leads to at best neutral but more often negative carbon implications, as well as other challenges.
- Also recycling alone won't be enough. Even if the entire industry were to increase its use of recycled plastics at the pace of the Global Commitment signatory group, global virgin plastic use in packaging would still remain above today's level until at least 2050, unless overall demand reduced¹⁴ (see Figure C).

WHAT IS REUSE?

Reuse of packaging refers to delivery models in which a single package achieves multiple trips or uses.

This is distinct from, and complementary to, recycling. Reuse models circulate a product or packaging as a whole, whereas recycling reprocesses the constituting materials into a new product or package. Reuse is considered here in its broadest form, including return and refill systems, both at home and on the go.

More information on reuse models can be found in the publication [*Reuse – rethinking packaging.*](#)



Given this, reuse is an essential part of the mix to decrease virgin material use in packaging at the scale required. Indeed, various reuse examples have demonstrated its potential to drastically reduce material use, in some cases by up to 70–90%.^{15,16}

While not a silver bullet that works for all applications in all contexts, reuse can deliver a range of environmental benefits when applied well.

A wide variety of studies and real-world case examples demonstrate that there are reuse opportunities across a variety of products, with the potential to offer substantial environmental benefits in terms of greenhouse gas emission savings, reduced water use, and significantly reduced material use and waste generation.^{17,18,19,20,21,22}

Reuse has a crucial part to play in reaching several Global Commitment targets, including: (i) take action to move from single-use to reuse; (ii) virgin plastic reduction; (iii) 100% reusable, recyclable, or compostable plastic packaging. As such, lack of progress in reuse makes it harder to reach those targets.

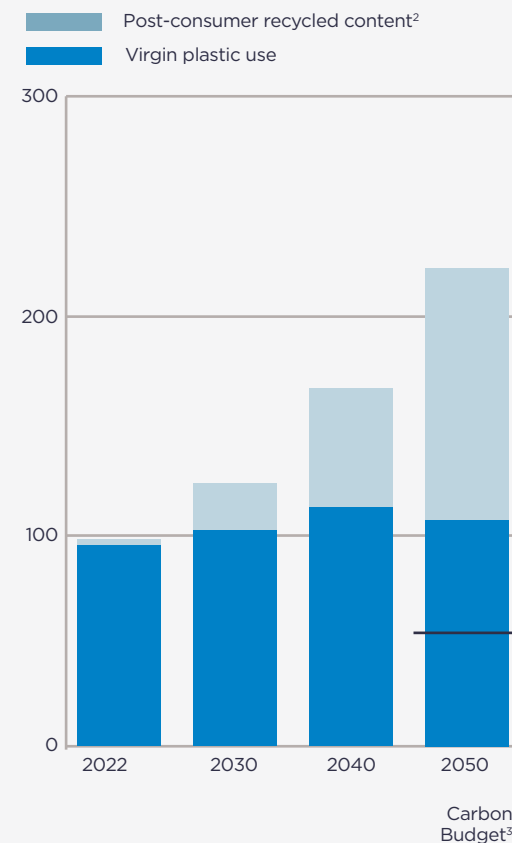
“Since 2018, having a diverse array of companies committed to advancing reuse has prompted many to establish new partnerships. At Algramo, we have alliances with several Global Commitment signatories across geographies. This has catalysed numerous learnings and the emergence of several successful models poised for scaling. However, there is more ground to cover. Beyond pilots, what is lacking are scalable rollouts to demonstrate that reuse can work on a large scale. More companies need to prioritise and invest in reuse models, and a robust policy framework is essential to enable and incentivise scalable reuse solutions.

**José Manuel Moller, Founder of Algramo
(a reuse innovator based in Chile)**

FIGURE C

Recycling alone is not enough to reduce virgin plastic use. Even if the industry ramps up recycled plastic use at the Global Commitment’s pace, virgin plastic use will still exceed current levels until at least 2050 without extra measures

Global plastic use in packaging by weight,¹ normalised (100 = 2022 plastic use)



¹ Assuming an annual growth rate of total plastic packaging of 2.93%, in line with Wood MacKenzie data (2018–2022)

² Applying 1.7pp annual growth in recycled content from Global Commitment signatories to entire market

³ Based on Eunomia Research & Consulting, “Is Net Zero Enough for the Materials Production Sector?”, 2022

 THE LAST FIVE YEARS

Back in 2018, reuse was not widely recognised as an important part of the solution. A few companies, in particular in the beverage industry, had legacy reuse systems in place, but beyond that virtually no major company had substantial reuse activities or ambitions.

Since then, momentum and action on reuse has risen substantially. Many companies have set up dedicated reuse teams and 61% of Global Commitment business signatories have launched reuse pilots (see Figure D). There are a few at-scale success stories, mainly in the category of refill models. Signatories The Coca-Cola Company, PepsiCo, and Spadel also became some of the first multinational consumer goods companies to set quantitative, time-bound reuse targets.

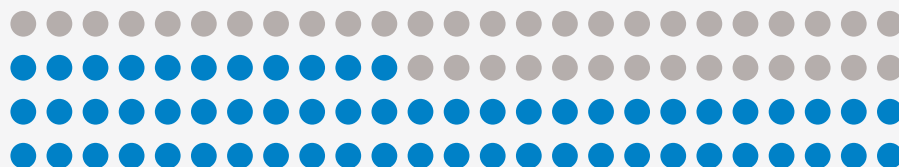
Despite these efforts, the signatory group’s overall share of reusable plastic packaging has remained stuck below 2%. The reasons for this vary by context and reuse type. A recurring barrier stems from the fact that, for certain reuse models, achieving favourable economics and a satisfactory customer experience hinges on a critical mass of companies embracing reuse and working together. This poses challenges for those aiming to be a first mover. Consequently, in the absence of such pioneers, kickstarting the necessary widespread adoption or collaboration becomes exceedingly difficult, resulting in a gridlock. **Breaking free from this gridlock will necessitate a concerted effort from both policy and business actors.**

“ Reuse is a tricky topic to crack. There are so many different elements at play: building filling lines that allow reusable bottles; building out a system of reverse logistics; getting consumers to choose this option and getting them to bring the bottles back. Doing this across markets around the world is a daunting task. If you compare reuse to post-consumer recycled content, increasing recycled content is quite straightforward – you pay a premium to buy more. Cracking reuse is much more complex and requires time. It also requires supportive policy action. The Global Treaty could be a key stepping stone towards collective action. **”**

Ben Jordan, Senior Director, Environmental Policy, The Coca-Cola Company

FIGURE D

While the majority of signatories have executed reuse pilots, the share of reusable plastic packaging has remained below 2%



61% of Global Commitment signatories have reuse pilots in place



<2% of their plastic packaging is reusable

LOOKING AHEAD

Strong policy measures will be crucial to enable the scaling of reuse and unlock the significant benefits it can offer. Although some reuse solutions can be brought to scale without further policy interventions, ambitious policy measures will be needed to capture the broader reuse opportunity. Policies such as time-bound, sectorial reuse targets; harmonised reuse definitions, metrics, and standards; and measures that shift the playing field from subsidising the linear economy to incentivising reuse can play a major role in mobilising this transition. The international legally binding instrument can play an important role here, as is explored in the paper *From single-use to reuse: A priority for the UN treaty*. The ongoing development of the EU Packaging and Packaging Waste Regulation also offers a unique opportunity to mobilise reuse at scale for the entire region, by setting ambitious reuse targets for priority sectors.

In parallel, business should drive progress where they can. Actions to be explored by businesses include:

- Scale refill and concentrate solutions: Individual companies have a clear opportunity to scale the adoption of these models within relevant product categories, as many of these are already economically and environmentally beneficial, and do not always require broad industry collaboration.
- Collaborate at scale on return models: Return models offer an even greater opportunity for breadth and volume of reuse applications in the long term, however they tend to require significant scale to be environmentally and economically beneficial. As virtually no company can reach the economies of scale required on their own, this will necessitate greater levels of collaboration across the industry and with local governments, including on shared infrastructure, interoperability, and standardisation of packaging. The transition to such systems will not be straightforward and will need to be carefully managed – yet given the potential rewards when implemented effectively and at scale, should be started now.
- Advocate for reuse policy: Policy measures will be crucial to enable the scaling of reuse. Businesses can support and accelerate this by actively advocating for ambitious reuse policies. For example, through the Business Coalition for a Global Plastics Treaty, which has already expressed its support and guidance for countries to set binding, quantitative, and time-bound reuse targets for priority product segments.²³

Reuse is the only packaging solution that is actually commensurate with the gravity of both the plastic pollution and climate crises. But we have to do it right. We'll need standards to undergird the new reuse infrastructure to ensure interoperability, convenience, affordability, and also boost equity and environmental performance. PR3 is developing exactly such standards, which are now being formalised and advanced through international standards bodies guided by a Panel representing the whole value chain.

Amy Larkin, Director, PR3

TACKLING FLEXIBLE PLASTIC PACKAGING WASTE IN HIGH-LEAKAGE MARKETS



WHY THIS IS PIVOTAL

Flexible packaging, such as wrappers, pouches, and sachets, are the fastest growing type of plastic packaging. Given their high functional properties, low weight, and cost-effectiveness, they are used ever more around the world.

They are also the most challenging plastic packaging category from a waste and pollution perspective, particularly in high-leakage regions,²⁴ the focus of this section. In many high-leakage regions, there exists a ‘sachet economy’, where numerous products are sold in small, single-portion, flexible packaging to low-income consumers. Yet, in these regions there is often also a lack of adequate infrastructure for collecting and managing packaging after use. While informal waste pickers play a hugely important role in these regions, picking up many other types of packaging, small-format flexibles tend not to get collected by those waste pickers due to their low value, and therefore have a much higher likelihood of ending up in nature. This section focuses on such regions without adequate infrastructure as this is where the problem is most acute, recognising that also in regions with more developed infrastructure, flexible plastic packaging poses significant waste issues.

Without tackling flexible plastic packaging in high-leakage regions, plastic pollution will continue to surge. Currently, an estimated 25,000 flexible plastic packaging items end up in the ocean every second. If we remain on this track, the number will double by 2040. In such a scenario, a staggering 20 trillion flexible packaging items would end up in the ocean, and many more in the environment in general, between now and 2040 (see Figure E).²⁵

FIGURE E

Flexible plastic packaging items are a major source of plastics leakage into our oceans

Based on The Pew Charitable Trusts and Systemiq, *Breaking the Plastic Wave: A comprehensive assessment of pathways towards stopping ocean plastic pollution, 2020*

Assuming an average weight of 10g (conservative estimate) per flexible packaging item

Assuming an annual growth rate of flexibles of 3.8%, based on Wood MacKenzie data over the period 2018–2022

Today
25,000

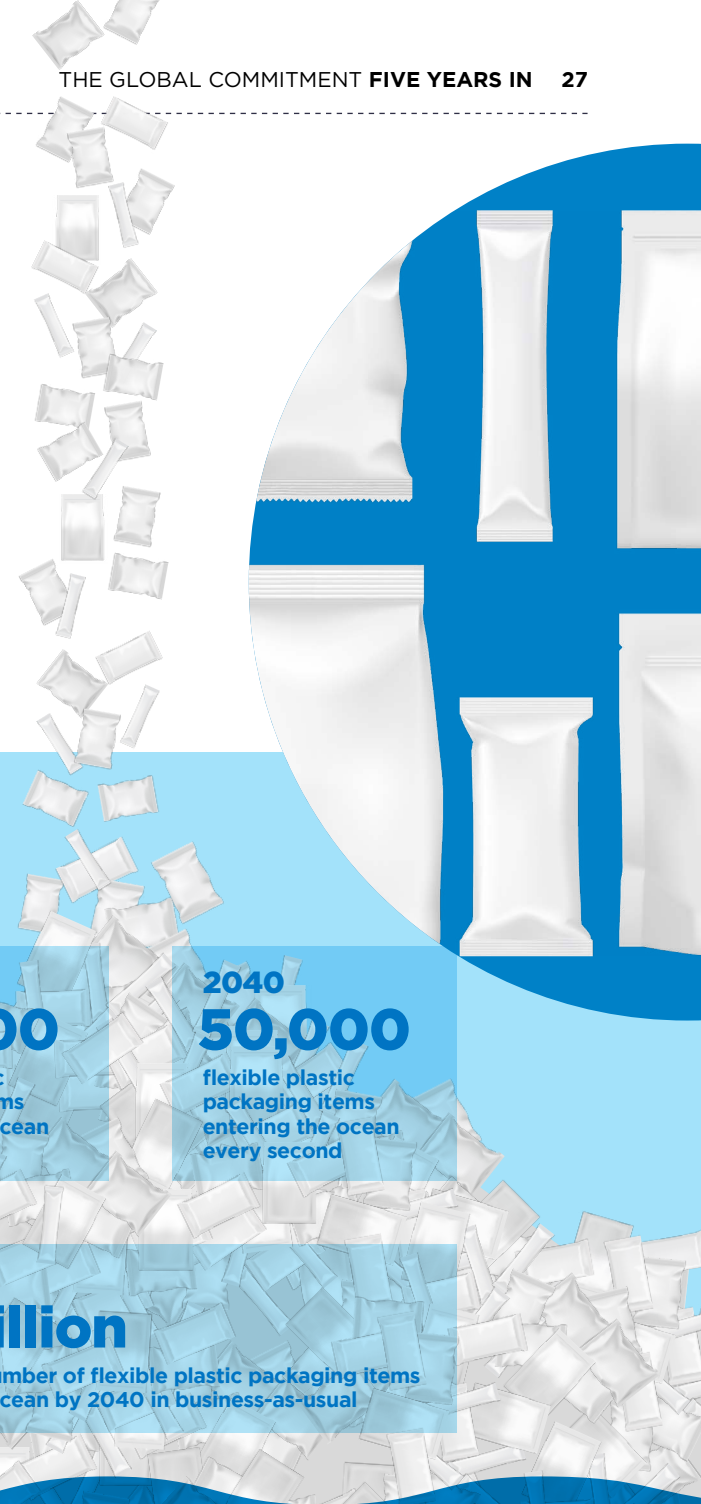
flexible plastic packaging items entering the ocean every second

2040
50,000

flexible plastic packaging items entering the ocean every second

2040
20 trillion

Cumulative number of flexible plastic packaging items entering the ocean by 2040 in business-as-usual

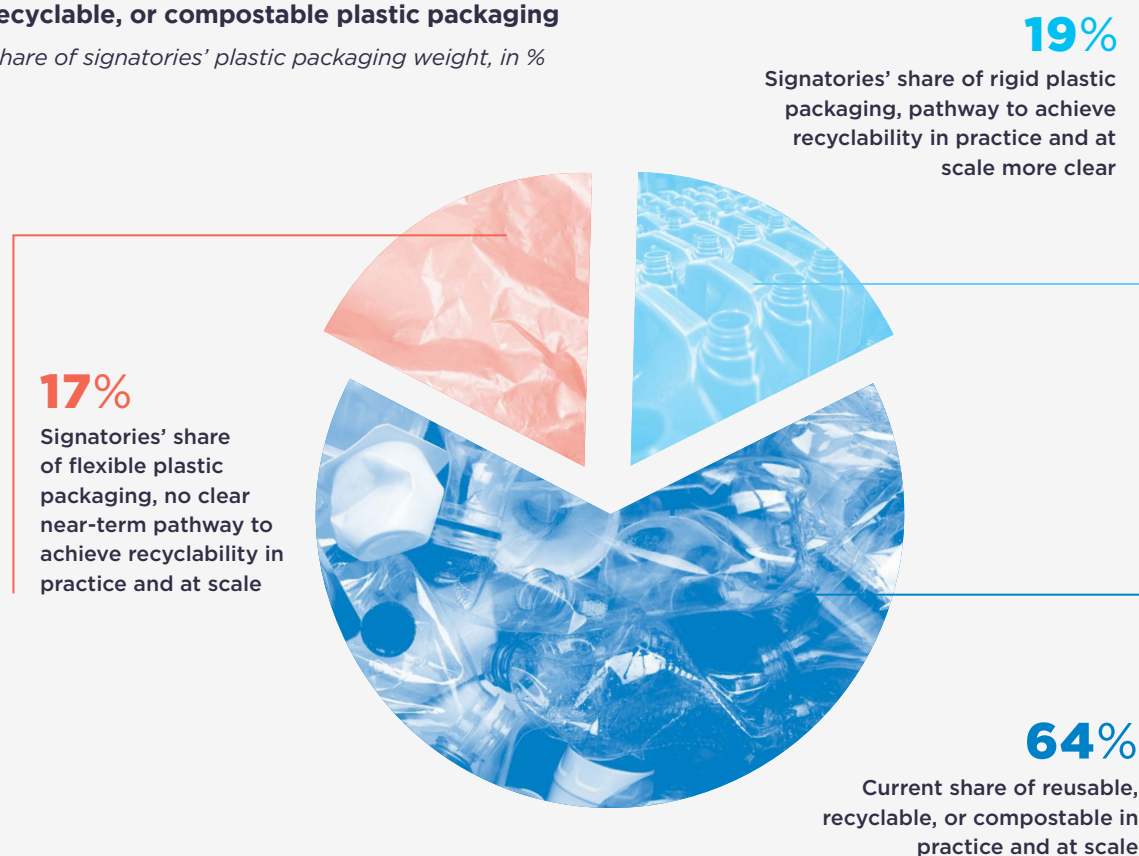


Flexible plastic packaging is a major barrier to achieving the Global Commitment target of 100% reusable, recyclable, or compostable plastic packaging. Consumer-facing²⁶ flexible plastic packaging represents about 17% of the signatory group's portfolio, and currently does not meet the definition of being 'recyclable in practice and at scale'. Even when collected, their format and design make them particularly challenging – technically and economically – to recycle at high quality and yield, even in regions with more developed infrastructure.^{27,28} While most rigid packaging types that are not currently considered recyclable at least have a pathway to becoming so in the coming years, this is not the case for flexibles. In addition, even if flexible plastic packaging were recyclable according to the Global Commitment definition, that's just a starting point – not the end. Ultimately, it should be collected and kept in circulation everywhere around the world.

FIGURE F

Flexible plastic packaging is the main barrier to achieve the target of reaching 100% reusable, recyclable, or compostable plastic packaging

Share of signatories' plastic packaging weight, in %





THE LAST FIVE YEARS

One crucial learning of the last five years is the disparity in context and hence the need to differentiate solutions by region. This section focuses on high-leakage regions with inadequate or nonexistent collection and management systems.

Over the last five years, signatories have explored several solution pathways to tackling the plastic flexibles issue, however it's become clear that all are challenging:²⁹

- **Designing packaging to be technically recyclable** has not significantly increased actual recycling rates. Businesses have invested in transitioning to monomaterial designs, but, due to their small size and low value, many of the challenges of collecting, sorting, and recycling them remain. The uncertainty about future recycling capabilities in countries with inadequate waste management infrastructure has led some businesses to hesitate in investing further in transitioning to technically recyclable flexible plastic packaging.
- **Innovating away from flexible packaging** towards alternative packaging or delivery models (e.g. bigger portions, reuse), remains a relatively underexplored strategy. Many businesses are hesitating to make the necessary investments, fearing a potential competitive disadvantage if their competitors do not follow suit. Readily

accessible alternatives are also not always available, that enable businesses to move away from this packaging type without unintended consequences in terms of resource efficiency and affordability.

- **Substituting flexible plastics with other materials,** such as paper, is another potential solution pathway, but it also presents challenges. They don't always have the right functional properties, and often come at significantly higher cost. Furthermore, while they may reduce environmental impact upon leakage, these substitutes can still cause negative impacts when ending up in the environment, and often rely on virgin materials for a single use.

With all potential solutions proving to be challenging, a stalemate has ensued, with no alignment on the direction forward and a resulting lack of confidence to make the major investments required. Although several companies are making investments, there is a widespread reluctance to commit to the substantial level of investments needed, particularly in markets with a large share of mismanaged waste. Compounding this situation are lingering uncertainties:

- Will policies prohibit or promote certain options? What if I invest in an option that then is later banned?
- What solutions will become the winning ones by application and geography? What if I invest in a solution that ultimately turns out to be sub-optimal?

- Will there ever be infrastructure in a certain region to collect and recycle these formats, and if so by when? Within that region, if there is no line of sight of scaled infrastructure, is it worth it to invest in designing for recycling?
- What if I make major investments and competitors do not? Will I remain competitive?

LOOKING AHEAD

Policy will need to play an important role in unlocking the stalemate. Policymakers can play a major role in setting the direction and levelling the playing field by creating clarity on: what options will and will not be part of the target solution space, and what outcomes are and are not going to be incentivised. Additionally, they can outline what the transition timelines are for all actors to work towards. Clarity on direction and timelines would instil the confidence to make the substantial investments required, thus prompting the entire market to take decisive action. The legally binding instrument on plastic pollution can play a crucial role here. Cross-industry and public-private alignment on a common way forward could help inform this direction of travel.



In parallel, businesses should champion innovation.

Waiting for regulation cannot be an excuse for inaction. Recognising that not all solutions are presently available, businesses have a significant role to play in innovating to ensure these become available. Forward-thinking businesses should take the lead in adopting new solutions, differentiated by geography and application.

Recognising the solutions will be different by geography and application, business and government action should focus on:

- **As a priority, shifting away from flexible plastic packaging in high-leakage markets where alternative solutions exist:** Strategies to be explored include: eliminating unnecessary packaging (e.g. box overwraps, marketing samples), changing the product (e.g. from liquid to solid soap), changing the packaging (e.g. from single portion sachet to larger recyclable packaging), and changing the delivery model (e.g. from single-use to small-portion reuse models, or new ways of payment to overcome affordability challenges). Substituting to alternative materials, while not the primary preference compared to complete elimination, can serve as a transition solution, provided they effectively mitigate the environmental impact in case these flexible packages do end up in the environment.

- **Innovating for applications where viable alternative solutions do not yet exist:** For certain applications, alternative solutions with acceptable socioeconomic and environmental trade-offs do not yet exist. For these, innovation should be a top priority and start now.
- **Collecting and circulating the flexibles we still use:** Where flexible packaging – plastic or other materials – is used, it is crucial to invest in keeping it out of the environment, and circulating it in the economy as much as possible. In high-leakage markets, this will require large-scale efforts across packaging design, formal or informal collection and recycling systems, and policy – far accelerated from the pace seen to date.

ESTABLISHING INFRASTRUCTURE TO COLLECT AND CIRCULATE PACKAGING AFTER USE



WHY THIS IS PIVOTAL

Infrastructure to collect, sort, and reuse or recycle packaging is fundamental to safely circulate materials in our economy and keep them out of the environment. Reduction and redesign for safe reuse or recycling are key parts of the solution. They need to be complemented by collecting and circulating the plastics we continue to use – and for this infrastructure is vital.

Without improvements in infrastructure to collect and circulate packaging after use, tens of millions of tonnes of plastics will continue to end up in the environment every year. Currently, an estimated one third of all plastic packaging ends up in the environment and more than half is landfilled or incinerated. Only ~14% is collected for recycling and ~10% is effectively recycled.³⁰ In numerous countries worldwide, the systems to collect and circulate this waste are yet to be put in place to the degree required. In a business-as-usual scenario, even by 2040 approximately 4 billion individuals would still be without access to organised waste collection services.³¹ Staying on this trajectory would significantly contribute to the projected surge of plastic leaking into the environment.

Improved infrastructure is crucial to achieving several Global Commitment targets, in particular the 100% reusable, recyclable, or compostable target. In addition, scaling infrastructure could accelerate progress towards recycled content targets by increasing the supply of recycled materials.



THE LAST FIVE YEARS

There have been many initiatives to improve infrastructure over the last five years. Several signatories have invested in funds and local projects to build collection or recycling infrastructure. Many NGOs, multilateral development banks, and other actors have also been investing in establishing or improving such infrastructure.

Recognising its critical role in infrastructure scale-up, many Global Commitment signatories for the first time explicitly supported and publicly called for Extended Producer Responsibility (EPR) policies. In 2021, over 150 organisations – the vast majority of Global Commitment signatories – signed a [statement](#) publicly calling for the implementation of EPR policies³² (see quote on the right). They recognised it as the only proven mechanism to deliver the ongoing, dedicated, and sufficient funding required to make the economics of packaging recycling work. This statement represented a significant step forward, with businesses essentially signalling their willingness to take their fair share of the (financial) responsibility for effective infrastructure.

However, over the past five years the actual improvement in infrastructure has been limited. There has been an increase in EPR policies and also the pace of new EPR policy developments is accelerating. Yet, many parts of the world are still uncovered by such regulation. Where EPR policy



We are calling for the implementation of Extended Producer Responsibility (EPR) schemes for packaging. We recognise that EPR is a necessary part of the solution to create the circular economy for packaging we are aiming for. EPR schemes, through which all industry players that introduce packaging to the market provide funding dedicated to its collecting and processing after use, are the only proven and likely pathways to provide the required funding. Without such policies, packaging collection and recycling is unlikely to be meaningfully scaled and tens of millions of tonnes of packaging will continue to end up in the environment every year.

150 businesses, NGOs, and other organisations from across the packaging value chain³³

has recently been introduced, its impact is yet to fully materialise. As a result, the increase in plastic production is still dwarfing the increase in plastic reuse and recycling; global collection and reuse and recycling rates are still very low, and the amount of mismanaged waste remains staggeringly high.³⁴



This lack of infrastructure improvements has been a major barrier to achieving the target of 100% of plastic packaging to be reusable, recyclable, or compostable by 2025. For packaging to be considered 'recyclable in practice and at scale', the Global Commitment currently requires it to achieve a 30% recycling rate for at least 400 million people. Given the slow increase in infrastructure building and resulting recycling rates, no single category of plastic packaging that was considered "not recyclable" in 2018, is considered "recyclable" now. Therefore, the progress on the target of reaching 100% reusable, recyclable, or compostable plastic packaging has been incremental. While signatories can make progress by eliminating or substituting packaging in categories that are currently not yet recyclable, part of the progress towards this target is dependent on infrastructure improvements so that more packaging categories become recyclable in practice and at scale.

Also, for the packaging types that are proven recyclable in practice and at scale, the lack of infrastructure is impeding higher actual recycling rates. Achieving a 30% recycling rate for at least 400 million people is a starting point - not the end. Ultimately, we need all packaging that we do use to be effectively and safely reused, recycled, and composted - requiring the necessary infrastructure all around the globe.



LOOKING AHEAD

A combination of several policy interventions will be needed to scale the required infrastructure. This includes, for example: measures to incentivise or mandate design for recycling; measures to mobilise financing and investments in waste management infrastructure (beyond packaging); targets and standards for the collection, sorting, reuse, and recycling of all packaging; measures to create demand for recycled content, such as minimum recycled content product standards; and landfill and incineration taxes or bans.

Extended Producer Responsibility (EPR) stands out as a particularly high priority policy measure to implement around the world, as the only proven mechanism to make the economics of packaging recycling work.³⁵ Making the economics work is a fundamental step to scaling infrastructure, as it creates viable and significantly de-risked investment opportunities, which can trigger a step-change in investments in infrastructure. EPR can also deliver benefits beyond being a funding mechanism, such as increased transparency, efficiency, and incentivisation of upstream solutions, such as reuse and improved packaging design.³⁶

It is crucial for EPR schemes to be well designed and inclusive. The way EPR schemes are designed and implemented is crucial for their effectiveness. Therefore, new EPR schemes should be carefully designed, and existing ones should be continuously

monitored and refined. While a number of factors need to be taken into account, a key consideration is how to best leverage the incredibly valuable work of the informal sector and include them in a way that ensures a just transition, enhancing the livelihoods and wellbeing of all people involved.

The current negotiations for the international legally binding instrument on plastic pollution offer a unique opportunity to establish and enforce effective and well-designed EPR schemes around the world. Under an international legally binding instrument, all countries could be required to put in place EPR regulations to reduce the amount of mismanaged waste and promote circular economy solutions, starting with priority sectors such as packaging. The instrument could provide the necessary definitions, principles, and minimum requirements to ensure a harmonised approach across countries towards establishing mandatory, effective, and fee-based EPR schemes. It will be important to do this while acknowledging different contexts and starting points and the need for technical assistance and capacity-building, as well as the necessary safeguards to ensure a just transition. National and regional governments should also not wait for the instrument to be in place, but in parallel continue to introduce and enhance EPR legislation.

Businesses can support and accelerate this by actively advocating for well-designed, mandatory EPR schemes, and do so consistently across geographies, including at international level through the [Business Coalition for a Global Plastics Treaty](#).

4 LOOKING AHEAD

This chapter provides high-level perspectives on what will be needed in the years ahead, based on the lessons learned from the last five.



GOVERNMENT AND BUSINESS ACTION WILL BE REQUIRED

The insights gained over the past five years make it evident that we require a dual approach: more ambitious, legally binding policy measures, as well as accelerated voluntary business action. This cannot be an either-or: both are crucial to unlock the progress we want to see.

The fastest way forward is through an “ambition loop” in which government policy and business action mutually reinforce and build off each other. Leading businesses can demonstrate what’s possible, as in the Global Commitment, and be vocally supportive of ambitious policy, as in the [Business Coalition for a Global Plastics Treaty](#). Both signal to governments that industry is ready for a higher level playing field. In turn, ambitious government policy enables industry leaders to raise the bar even further, and makes sure everyone ups their game. Together, industry and governments should discuss key barriers to progress, and how to best overcome those, particularly as we work towards a harmonised international policy landscape.

FIGURE G

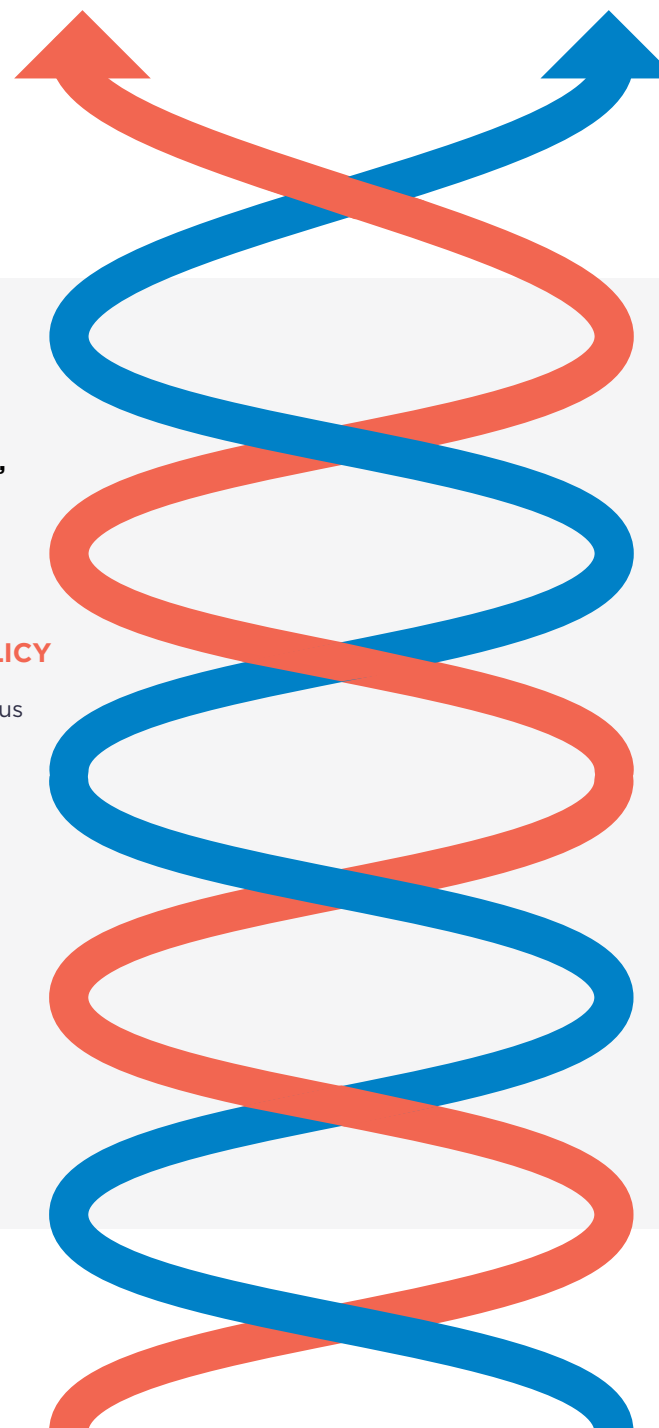
Actions from businesses and governments are mutually reinforcing, resulting in an ambition loop

GOVERNMENT POLICY

- Negotiate an ambitious international legally binding instrument
- Drive national and local policy

BUSINESS ACTION

- Accelerate delivery of action
- Advocate for more ambitious policy



The international legally binding instrument on plastic pollution presents a once-in-a-generation opportunity to accelerate global policy change.

By putting in place legally binding global rules and measures, the instrument can ensure that all countries act in concert to unlock circular economy solutions to end plastic pollution, including: eliminating the plastic we don't need; innovating towards new materials and business models; and circulating all the plastic we still use. In parallel to the negotiations of the instrument, governments should also ramp up the implementation of effective regulations in their own jurisdictions.

Voluntary business action and ambitious advocacy that complements and stimulates long-term policy change will also remain vital to push progress further, faster.

Regulation will not solve everything, given the highly complex nature of plastic and packaging waste. Voluntary business action will continue to play a crucial role in innovating, showing what's possible, and creating demand for solutions. Waiting for regulation cannot be an excuse for inaction – and companies leading the way will reap the rewards. Equally, businesses need not wait for regulation to enable change, but can play an active role in advocating for it.

Public and private sector finance will also need to play an important role in enabling this race to the top.

For example, innovations in new materials, product designs, technologies, and business models all need funding for R&D and scaling, while the development of infrastructure will require, in addition to EPR, catalytic capital from public finance institutions and others to crowd in private finance and de-risk these projects. Means of implementation will also be an important consideration in the legally binding instrument.

In all of the above, both global direction and local action will be needed. In policy, we need an international legally binding instrument and policy action at the national and local level. In voluntary efforts, there is a need for initiatives setting global direction, like the Global Commitment, as well as localised efforts like the Plastics Pacts, which stimulate targeted local action.

All global and local actors need to ensure a just transition. A key element of the Global Commitment vision is that “the health, safety, and rights of all people involved are respected”. It's vital that the transition to a circular economy is fair, equitable, and inclusive. Highly relevant in this context are the inclusion and rights of informal waste picker workers.

Chile's entry into the Global Commitment and the subsequent launch of “Circula el Plástico”, the Chilean Plastics Pact, has enabled the connection and strengthening of collaboration with different actors involved in the plastics sector to accelerate its transition to a circular economy. This experience has led to projects for regulatory changes, pilots for recycling of difficult-to-recycle materials, exchanges and shared-knowledge between actors who otherwise would not be in contact, and much more. We hope that in the coming years, the lessons and good practice will continue to be repeated. We invite everyone to join!

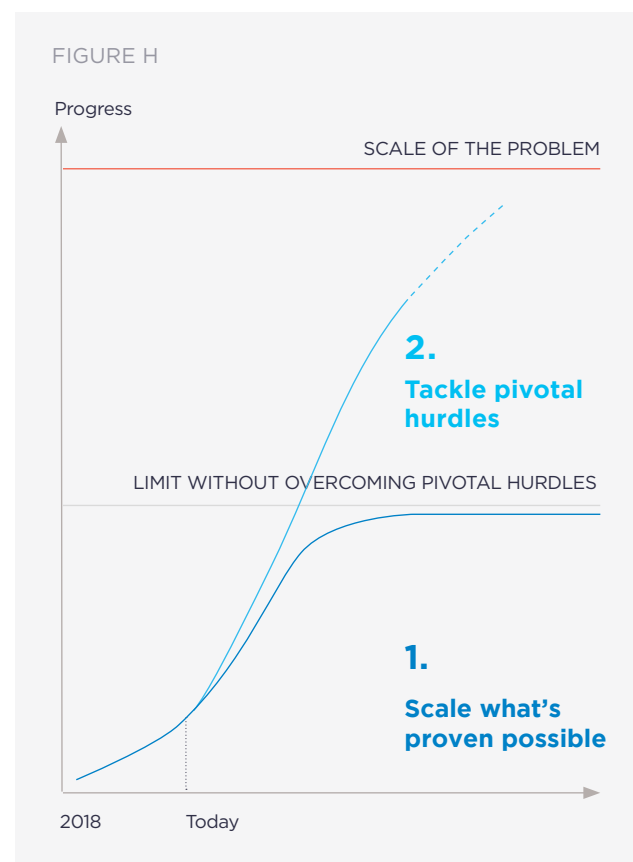
María Heloísa Rojas Corradi, Minister of the Environment of Chile

The plastics pollution crisis requires a global response, a shared vision, ambition, and a common language. The Global Commitment has provided this direction. At the same time, whilst this is a global crisis, we must recognise the crucial importance of local contexts which vary widely in geographies around the world. Beginning with The UK Plastics Pact in 2018, WRAP supported the creation of a network of national and regional Plastics Pacts to activate solutions on the ground, tailored to the local context. This twin-track approach of a global vision and localised network is acting as a powerful vehicle for global and tailored localised systems change. It is helping us realise the potential of a circular economy for plastics and improve the outcomes for people affected by plastic waste around the world. We encourage businesses to engage at both levels to demonstrate real commitment to tackling the plastic pollution crisis.

David Rogers, International Director, WRAP

SCALE WHAT IS PROVEN POSSIBLE AND TACKLE THREE PIVOTAL HURDLES

Over the last five years, industry leaders have compellingly demonstrated that progress is possible across a number of key areas, but it has also become apparent that there are three pivotal hurdles standing in the way of further progress.



Based on this insight, we call on policymakers, those negotiating the legally binding instrument, and businesses, to:

(1) Replicate, scale, and mandate the solutions that industry leaders have already compellingly demonstrated are possible. Limiting virgin plastics use, eliminating problematic and avoidable plastic items, and increasing recycled content are all areas where Global Commitment business signatories have shown significant progress is possible, but where the market as a whole is lagging behind. Therefore, policymakers have an opportunity to accelerate the shift by creating a higher level playing field where the entire industry advances in these areas. In parallel, businesses should further scale these solutions to accelerate the progress needed and as such stay ahead of regulation and respond to increasing shareholder and customer pressure.

(2) Overcome three pivotal hurdles currently blocking progress through concerted policy action and business innovation. Over the last five years, it has become clear that even industry leaders have made limited progress in some areas, with three pivotal hurdles standing in the way: scaling reuse, flexible plastic packaging in high-leakage countries, and lack of infrastructure to collect and circulate packaging. Overcoming these pivotal hurdles is critical – otherwise, progress will simply plateau long before coming close to solving plastic waste and pollution. To do so, bold policy interventions and business innovation will be needed.

Al Gore said: 'The will to act is a renewable resource.'

In terms of the Global Commitment, the willingness comes from knowing what you are doing is worthwhile, without that we won't make any progress. I'm worried when companies see they miss the mark that they'll stop trying harder, being innovative, and trying another thing. I don't want us to lose hope.

Look at what we've collectively done with plastics in five years; it took decades to move in this way on climate change. It's progress. It's not enough, but it's progress, and faster than what it would've been without the Global Commitment. If we can't celebrate that, while still holding ourselves accountable, we'll lose the will to carry on...

At the end of next year, we're going to have a legally binding instrument which will change the landscape of how we use this material. It's going to change things, there'll be countries which go even further. Now, everybody is rethinking how they use this material, and that is change. We're doing something which, for most of us, will be a once-in-a-career opportunity.

It had to start somewhere.

**Erin Simon, Vice President,
Plastic Waste + Business, WWF**

THE FUTURE OF THE GLOBAL COMMITMENT

Looking ahead, the Global Commitment will continue to serve as a key force in driving voluntary action and openly sharing both successes and obstacles with the world, informing and complementing the international legally binding instrument.

The Global Commitment will continue to guide progress for voluntary action, provide transparency on where progress is made and where it is lacking, and share the resulting learnings. It will inform the negotiations for a global legally binding instrument on plastic pollution, and other policy debates, and complement policy by continuing to push progress further, faster.

We will, together with signatories and stakeholders, chart a path for the Global Commitment beyond 2025 - evolving it based on the learnings we now have, for maximum impact towards 2030.

We know there is still much work to be done and we need to move faster, however the foundations laid in the last five years give us hope. It will be hard, but we forge ahead - together - with much more clarity on what needs to be done, and committed to the vision of a world in which plastic never becomes waste or pollution.



The industry has come a long way since the Global Commitment first began. Now, we're reaching the hard part and we know that's challenging - it should be. But the learnings we have put us in a better position to develop new solutions and unlock further progress. As with any initiative, you can't just carry on with the same strategy; you have to re-evaluate and focus more to establish the next phase.

Matt Demorais, Head of Corporate Affairs, Unilever



From its launch in 2018, the Global Commitment has led the way from fragmented action to common vision; from hardly any data to transparency and clear definitions for a large group of leading players. The solutions and barriers to the global plastics problem identified in the Global Commitment will provide valuable knowledge as we collectively look ahead to a Global Plastics Treaty and undertake further action to address the enormous impacts of plastic pollution.

Simon Reddy, Director, International Environment, The Pew Charitable Trusts



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We extend our heartfelt thanks to the Global Commitment signatories for their active involvement in the initiative, delivering meaningful progress, and investing significant time and efforts in reporting their progress to the world, every year.

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ABOUT



The Ellen MacArthur Foundation is an international charity that develops and promotes the circular economy in order to tackle some of the biggest challenges of our time, such as climate change, biodiversity loss, waste, and pollution. We work with our network of private- and public-sector decision makers, as well as academia, to build capacity, explore collaborative opportunities, and design and develop circular economy initiatives and solutions. Increasingly based on renewable energy, a circular economy is driven by design to eliminate waste, circulate products and materials, and regenerate nature, to create resilience and prosperity for business, the environment, and society.



UNEP is the leading global voice on the environment. It provides leadership and encourages partnership in caring for the environment by inspiring, informing and enabling nations and peoples to improve their quality of life without compromising that of future generations.

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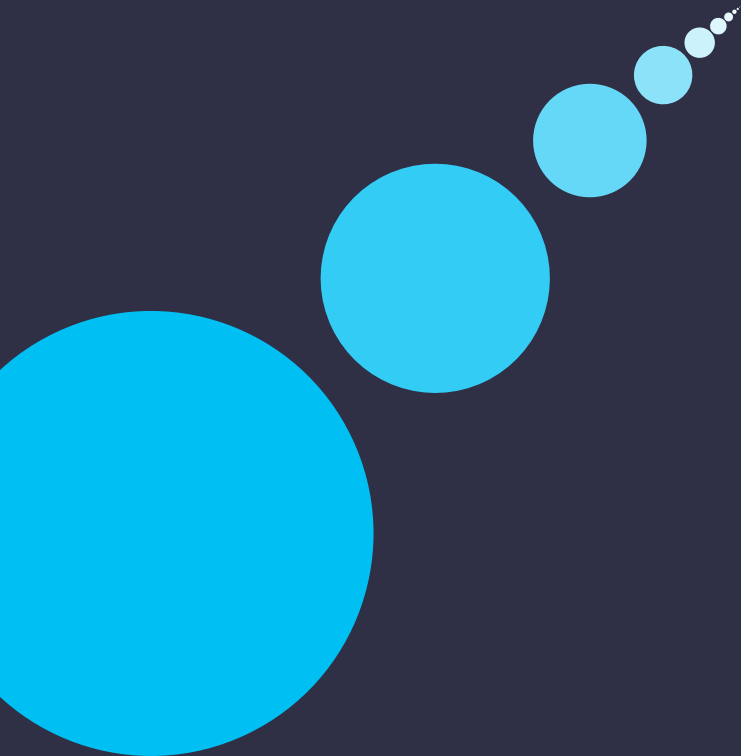
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ENDNOTES

- 1 See Figure A, p.16 for more details
- 2 World Economic Forum, Ellen MacArthur Foundation, and McKinsey & Company, *The New Plastics Economy – Rethinking the future of plastics* (2016)
- 3 OECD, *Global Plastics Outlook: Policy Scenarios to 2060* (2022)
- 4 Some that have confirmed to join are still in the process of formally onboarding. The full overview of government signatories can be found [here](#)
- 5 Conservative estimate based on a subset of signatories that publicly announced or voluntarily reported their planned investments. This includes Nestlé’s CHF 2 billion for food-grade recycled plastics and the development of innovative packaging solutions (2020); Indorama’s \$1.5 billion in recycling (2019); Danone’s €900 million to ensure the circularity of packaging (2020); The Coca-Cola Company’s \$425 billion on reuse in Brazil; Mars, Incorporated’s USD hundreds of millions in redesigning its packaging portfolio; Henkel AG & Co. KGaA’s USD 633 million as reported in the 2020 Global Commitment report; the Government of the United Kingdom’s GBP 2.9 billion to support local infrastructure for waste collection and recycling through public-private finance initiatives; and a range of other examples
- 6 Weighted average across those signatories that reported on this optional metric of technical recyclability (which is the vast majority of the relevant signatories)
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- 14 When the total use of plastic packaging continues to grow at the current pace (i.e. average growth rate of 2018–22)
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- 24 Regions with a high proportion of plastic packaging ending up in the environment, often with limited collection and management infrastructure
- 25 Based on the current weight (tonnage) of flexible plastic packaging ending up in the ocean, as estimated by The Pew Charitable Trusts and Systemiq, *Breaking the Plastic Wave* (2020). Converted to an estimated number of items based on a conservative assumption of 10g per item (highest leakage items such as wrappers, sachets, carrier bags, wraps around beverage cans, etc. are typically all below 10g). There are larger items that are heavier, but these typically have a lower propensity to leak). Current trajectory is defined as continuing the current 3.8% annual growth of flexible plastic packaging use and the current ocean leakage rate
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- 27 Ellen MacArthur Foundation, “[Flexible Packaging Overview](#)”
- 28 For a plastic packaging category to be considered recyclable in practice and at scale, it must meet the minimum threshold of 30% recycling rate in countries representing at least 400 million inhabitants
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- 31 The Pew Charitable Trusts and Systemiq, *Breaking the Plastic Wave: A comprehensive assessment of pathways towards stopping ocean plastic pollution* (2020)
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- 33 The Ellen MacArthur Foundation, *Extended Producer Responsibility – a necessary part of the solution to packaging waste and pollution* (2021)
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