RECOUP

RECycling Of Used Plastics Limited

Stakeholder Opinions

Plastics Packaging and Recycling

A Unique Stakeholder View

RECOUP welcomed delegates from all sectors within the plastics recycling supply chain to their annual Plastics Recycling Conference. At the 2016 Conference the delegates were asked a number of questions to ascertain their views on plastics packaging and recycling using a hand held voting system. The delegates were from the whole of the plastics recycling and resource chain;

- 18% Trade Association or NGO
- 20% Waste Management Company
- 13% Packaging
- 12% Reprocessor
- 12% Retailer/Brand Owner
- 9% Local Authority
- 8% Academic
- 8% Polymer Producer

The delegate responses are summarised in the following document. Data analysis of the sector split and answers showed no correlation between the sector that the delegate represented and their views.

The questions were put to the delegates at the end of the presentations from the main speakers and were designed to stimulate debate.

The voting was anonymous and could not be related back to any individual. The delegates were free to answer as frankly and openly as possible.

Q1. Do you think clarity of plastics recycling for the household has moved forward, gone backwards or stayed the same since the last RECOUP Conference?

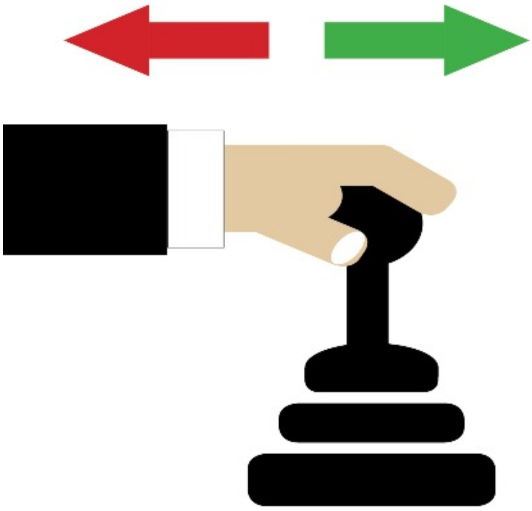
STUCK IN NEUTRAL

13%

Gone backwards

11%

Gone Forwards



76%

Stayed the same

Consumer Understanding:

Despite consumer engagement continuing during 2016, it was perceived by the majority that there had been no improvement in the clarity of plastic recycling for householders since the 2015 RECOUP conference.

Both the original plastic recycling consumer insight work in 2014 and a new update supports the view that confusion around household plastic recycling, and desire for more information still exists. In the latest study, 34% of consumers cited uncertainty about which plastics can and can't be recycled as the key barrier to recycling more. It also found that 79% of consumers used on-pack recycling labels (OPRL) where available, with almost half of the respondents referring to the label often.

The RECOUP UK Household Plastics Collection Survey 2016 showed the overall rigid plastic packaging recycling levels collected had marginally increased at 1.4%. The expectation is that through the consistency programme and the Pledge 4 Plastics initiative, this position can be improved during 2017. Increasing use of the OPRL scheme will also help to deliver a simple and consistent recycling message on both retailer and brand packaging to help consumers recycle more.

76% of the delegates felt that plastics recycling clarity to the household had not changed throughout 2016.

13% felt clarity had gone backwards throughout 2016 and the consumer had become less clear on what can and cannot be recycled .

Only **11%** of the audience felt that there had been any move forward.

The perception is that the consumer is still not confident with what is and what is not recyclable as well as how plastics packaging should be treated before recycling.

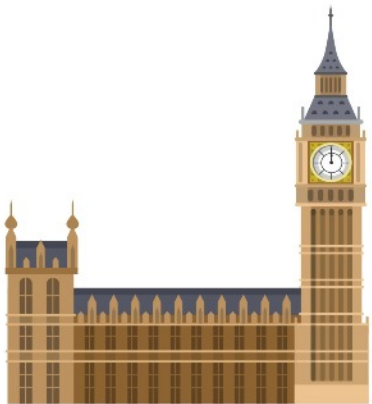
Q2. Who should carry the primary responsibility for consideration of recyclability of plastic packaging in the initial design process?

Brand owner/retailer

20%

Product or Packaging Manufacturer

20%



Government 3%

ALL STAKEHOLDERS 57%

The majority of the industry **(57%)** felt that the responsibility for the consideration of the recyclability of plastic packaging in the design process should be a joint responsibility between all stakeholders;

- Government ,
- The packaging manufacturer,
- The product manufacturer and
- The brand owner/retailer.

Combined Stakeholder Action:

Impacting the initial design process and improved supply chain collaboration are some of the most commonly identified opportunities to improve plastic recycling and reduce litter. There are a wide range of activities in this area which are effectively a form of extended responsibility, and joining up these activities and aligning them with priorities will be important. A job for all stakeholders as supported by the responses to this question.

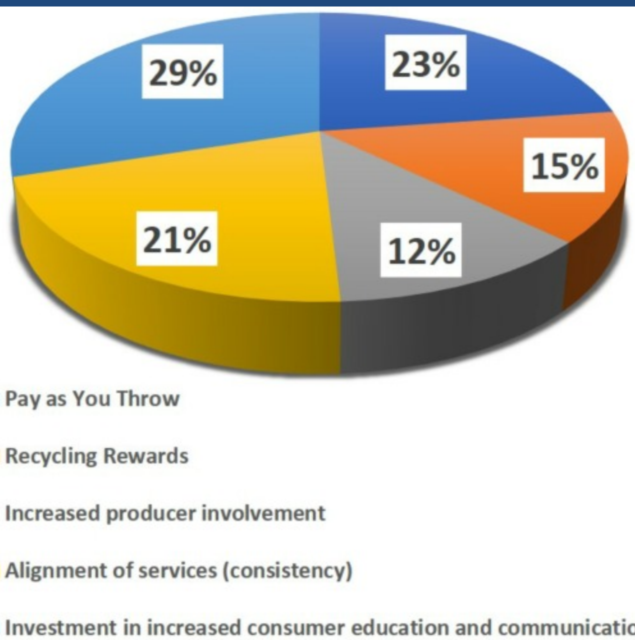
Whilst the responsibility needs to be with the producer supply chain, government also has a challenging responsibility to implement ambitious legislation and strategies to provide the right conditions to achieve resource and recycling goals whilst meeting business needs and ensuring packaging is fit for purpose. The opportunity to work within a European Circular Economy package is still unclear, but RECOUP will continue to deliver and update 'Recyclability by Design' guidance, and work with packaging producers, brands and retailers in this area.

Q3. We need to stop plastic leakage into the natural environment, including marine environment, how can we achieve this?

The feedback suggests that a joined up strategy led by a combination of legislation **(30%),** better infrastructure **(22%)** and more consumer recycling and litter behaviour change activities **(30%)** would be the best approach.

Engaging with countries where the issues are most prevalent, particularly non EU countries **(9%)** and financial consumer rewards **(9%)** were also recognised as possible supporting measures.

Q4. How can Local Authorities maximise their recycling collection services?



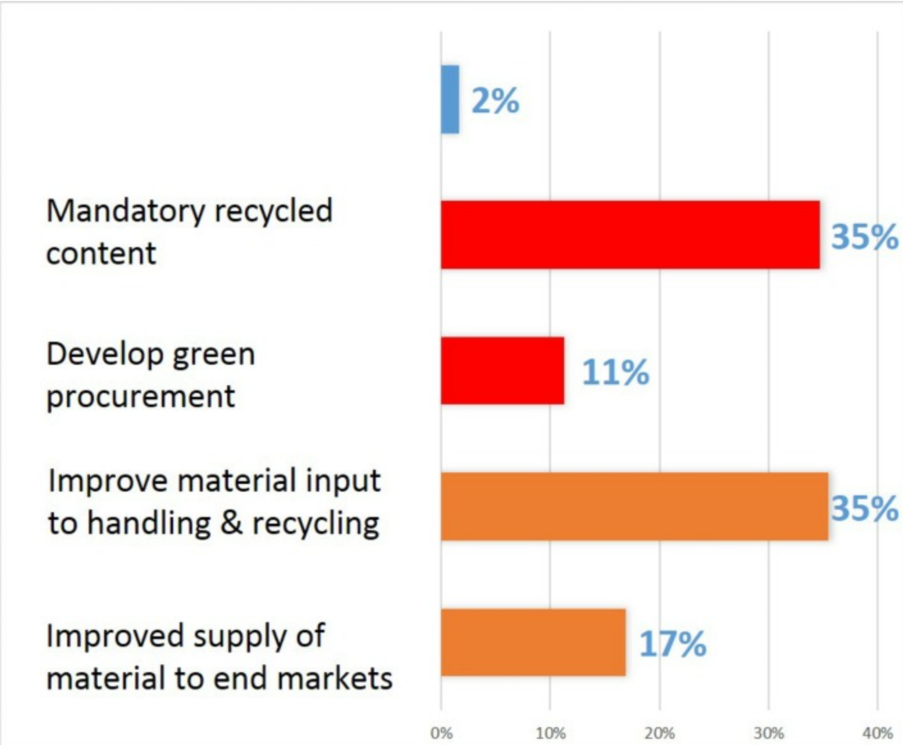
Thinking of how Local Authorities could maximise their recycling collection services the delegates viewed this as requiring many different approaches:

- 29% viewing it as through investment in increased consumer education and communications.
- 23% through 'pay as you throw' schemes.
- 21% through alignment of services and consistency.
- 15% through recycling rewards schemes.
- 12% through increased producer involvement.

No Quick Fix:

This would indicate a multi-pronged approach would give Local Authorities the best opportunity to maximise their recycling collection provision, reinforcing the message and enabling stakeholders to all play their part. Referring to Q 1. if improvements both in quality and quantity of household plastics recycling were to be achieved then investment would be required from manufacturers, the recycling industry and local and national government complete with a strategy for consistent delivery to maximise efforts.

Q5. We can create more value for plastics resources by…

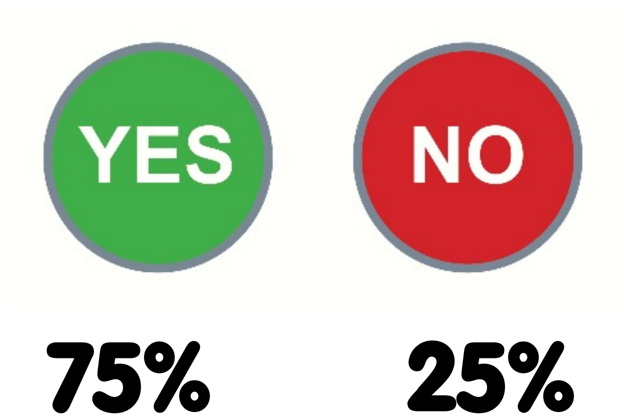


35% of the delegates felt a mandatory recycled content would create more value. **One in 10** of the of delegates felt that developing green procurement requirements could create value. Both of which would require Government intervention.

35% felt there needed to be an improvement to the material inputs in plastics handling and recycling processes, and **17%** felt improvement in the supply of material could create value. This equates over half **(52%)** of the delegates feeling that improving material quality was key to creating value.

Only **2%** of those questioned felt that the industry should just accept that resources would be lost. This reflects the view that the industry should strive to create and improve the value of plastics as a resource.

Q6. Can the UK can deliver an effective circular economy and recycling package outside the EU?



The majority of delegates, **(75%)** felt that the UK could deliver an effective circular economy and recycling package outside the European Union.

25% of those questioned viewing this as difficult to achieve outside of the EU.

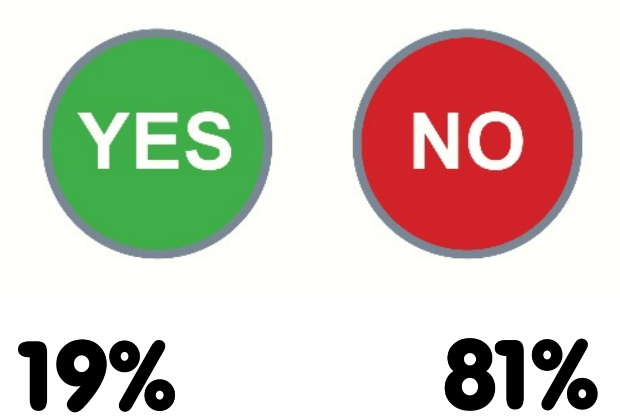
Circular Economy and its Future:

Effective circular economy and recycling packages were not seen as unobtainable since Brexit.

Defra has told industry stakeholders it is working under the assumption that the European Commission's circular economy (CE) package will apply to the UK.

The Department shared its views on key elements of the EU proposals, including municipal and packaging waste recycling targets and extended producer responsibility (EPR), at a meeting in London on 19 January 2017.

Q. 7 Do you think that the packaging and recycling press accurately reflects the health of the UK plastics recycling sector?



19% of the delegates felt that the packaging and recycling press accurately reflected the health of the UK plastics sector.

With **81%** of the audience still feeling that trade press did not. This indicated that there were still some areas where the industry could work with the press to improve the relationship. Could the industry itself do more to work with the press to educate, involve, and inform in an effort to equip the press to improve relationships.

Industry Media Engagement:

The industry itself needs to help promote and improve its own PR and keep informing both the national and trade press of the innovations taking place within plastics recycling. It is only through continual dialogue that the industry can expect a more accurate reflection of its own state of health.

Does the industry shy away from tackling criticism and answering the questions that the public seek answers on through press? Should the industry do more to engage on the 'hot topics' in an effort to be seen as part of the solution.

In Conclusion

The industry feels that more can be done in terms of quality and quantity of recyclate and that the industry has a bright future but collaborative working from all sectors is essential for the industry to move forward.

The need to keep informing the press of successes is crucial to give an all round view of the industry. However it can often be difficult to get sectors of the supply chain to make known their markets and be resolved in unpolitical and uncompetitive discussions.

The tendency also not to confront controversial issues may allow the press to see the industry as part of a problem not a solution. So much can be done in terms of gaining support and improving goodwill through ongoing dialogue.

Informing and educating the consumer continues to be important to make sure that plastics end up where they should be and to show the the individual that their own effort are an important part of solving the problem.

Whilst it is encouraging that all sectors view the industry holistically and understand the complexities of the whole cycle of the plastics recycling supply chain many of the problems the sector faces rely on collaborative working to ensure success. Although much can be and is being done by individual companies, trade bodies and other organisations to facilitate this collaborative approach Government support both legislative and financial is critical to enable the industry to reach its goals and achieve its full potential.

It is encouraging that no one questions the need for more recycling and less litter. There are shared goals across the industry the challenge is to be able to mobilise a strategy that is acceptable and supported by all.

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