



The Future of Plastic Packaging Amid Sustainability Pressures

November 2022

INTRODUCTION

Scope

Key findings

PLASTIC PACKAGING IN TODAY'S CHANGING RETAIL LANDSCAPE

Crisis-resilient nature of packaging (including plastic) in the consumer goods marketplace

E-commerce: A transformative pandemic-related growth accelerator

Consumers expect service and increasingly, sustainability from their retail purchases

Inflationary cost pressures are high: Pack sizing as one instrument to mitigate the impact

Material view: Plastic's versatility across category and size mix explains its strength

Plastic is set to increase share, but will be more renewable in nature

Consumers, regulators and corporations seek a plastic waste-free future

CONSUMER AND REGULATORY INFLUENCERS SHAPING THE FUTURE OF PLASTIC

The consumer: Rise of the eco-conscious consumer as environmental concerns grow

Reducing plastics use is the top action area for consumers wanting to live sustainably

Recyclable: Most trusted of green product labels; positive sign of consumer understanding

Actionable pack descriptors resonate: Recyclable regarded most sustainable, plastic, least

Consumers may seek sustainable packaging but not all are willing to pay a premium for it

The regulators: Sustainability legislation targets material circularity and eradication of waste

Europe leads on regulation via taxation and the single-use plastic directive

Updates to Europe's PPWD expected soon; concern on implementing goals of the Green Deal

Greater global harmonisation on the way as UNEA endorses legally-binding plastic treaty

CORPORATE SUSTAINABILITY ACTION TO ADVANCE CIRCULARITY

Key pillars to attaining circularity in plastic packaging

Industries widely commit to renewable plastics, recycling and to reducing waste

Packaging commitments from consumer goods industry leaders...

...and from packaging suppliers across the materials spectrum

Removal: Responses to remove plastic are apparent across the supply chain

Designing rigids for recycling: PET in Europe fares best but still some way to go

Brands switching to transparent PET to improve material recyclability and reuse

Circularity in flexible plastics: Material efficiency positive and the quest for recyclability

Mono-materials support brands' drive to reduce, refill, recycle and reuse

Kerb-side recyclable mono-material brand launches

Retailer take-back schemes help bridge flexibles' recycling gap

Recyclable and recycled reduces waste and emissions: Let consumers know on pack

Collaboration and investment in recycling are key to ensuring access to sustainable plastics

Refillable reuse models gather momentum but remain niche

Beauty: From in-store to on-line, interest in refillable beauty strengthens

Plastic alternatives: The potential for fibre and metal

Food: Uptake in paper to reduce use of difficult-to-recycle plastics

Bio-/plant-based polymers also hold a role

FUTURE INVESTMENT PRIORITIES

Business to prioritise sustainability investment on packaging and waste/recycling

Mondelez continues to invest in redesign, collection and recycling to advance circularity

Core expectations for the future of plastic packaging amid sustainability pressures

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