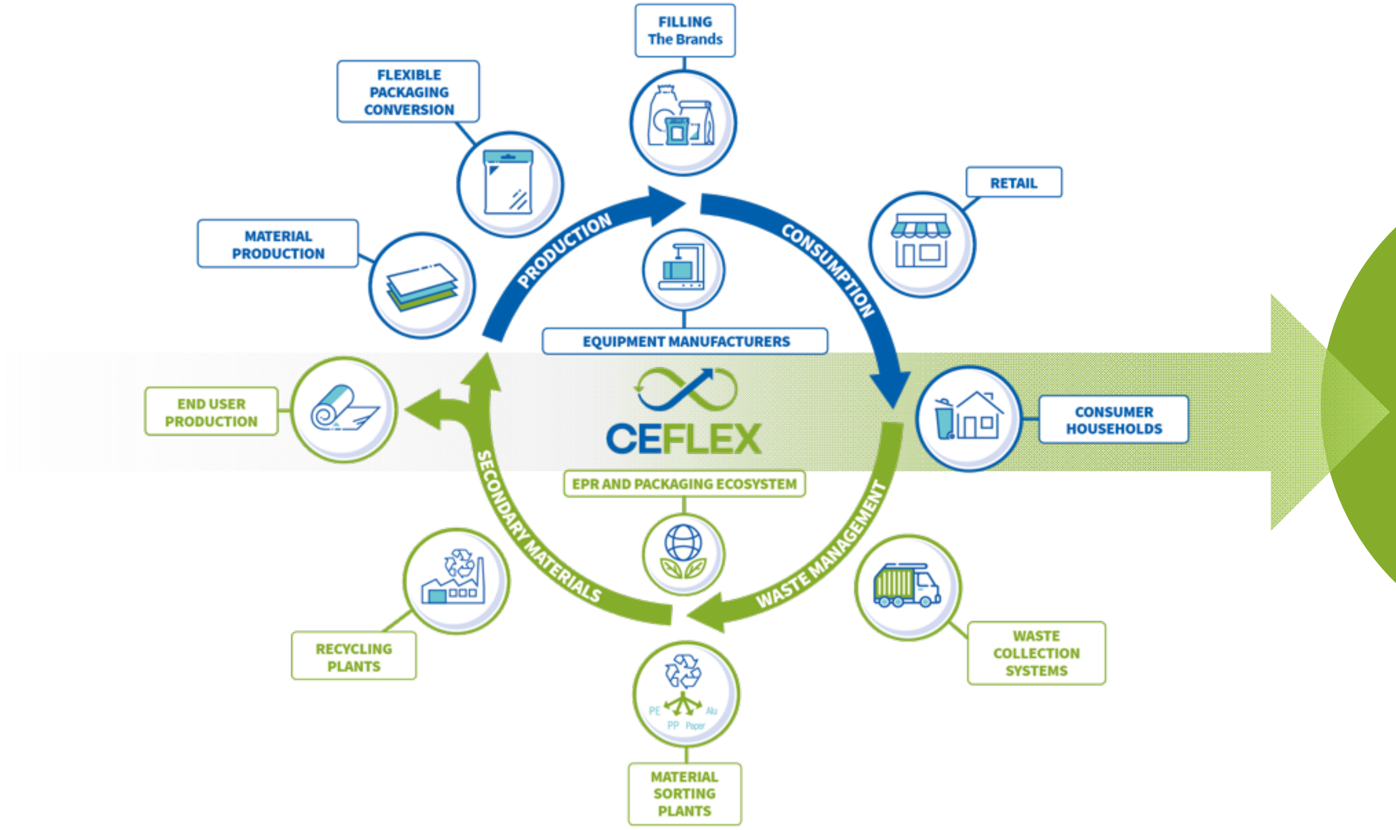
Accelerating Flexible Packaging Circularity

BVSE Circular Plastic Day, 10 June 2026

Collaborating and innovating together

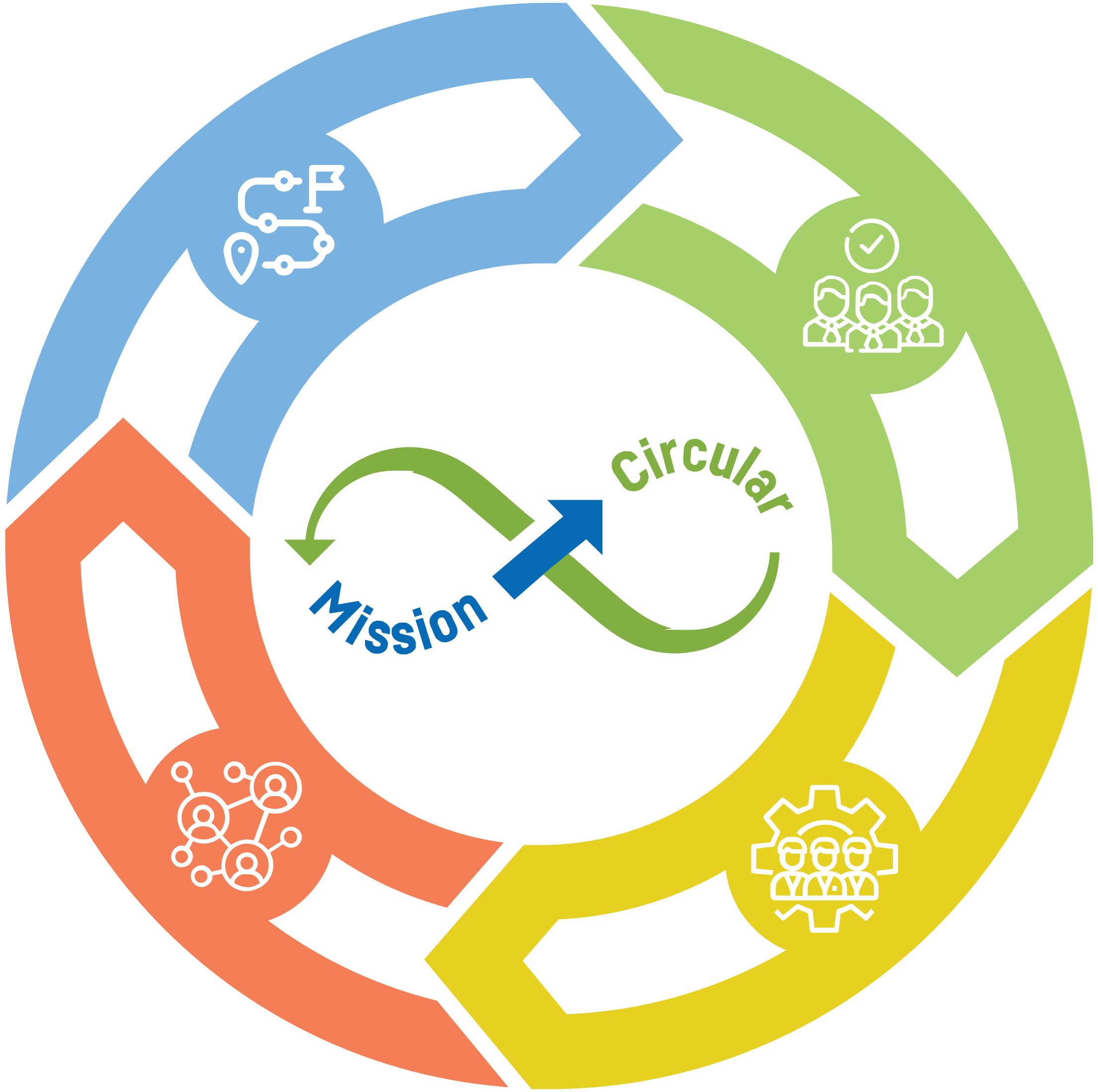


>150 stakeholders A critical mass across the entire value chain

1. Material Producers
2. Film Producers and Converters
3. Brand Owners and Retailers
4. Waste Collectors, Sorters and Recyclers
5. Flexible packaging ecosystem

Our 'Mission Circular'

Accelerating progress for the entire value chain



ROADMAP

Providing the **analysis and direction** to tackle key challenges and opportunities in the circular economy

KNOWLEDGE

Building **understanding and alignment** around real-world solutions

LEGISLATION

Shaping **effective legislation** through engagement, advocacy and evidence

ACTION

Driving focused action on **critical technical and economic barriers** to support a robust and sustainable value chain

Plastic packaging placed on market

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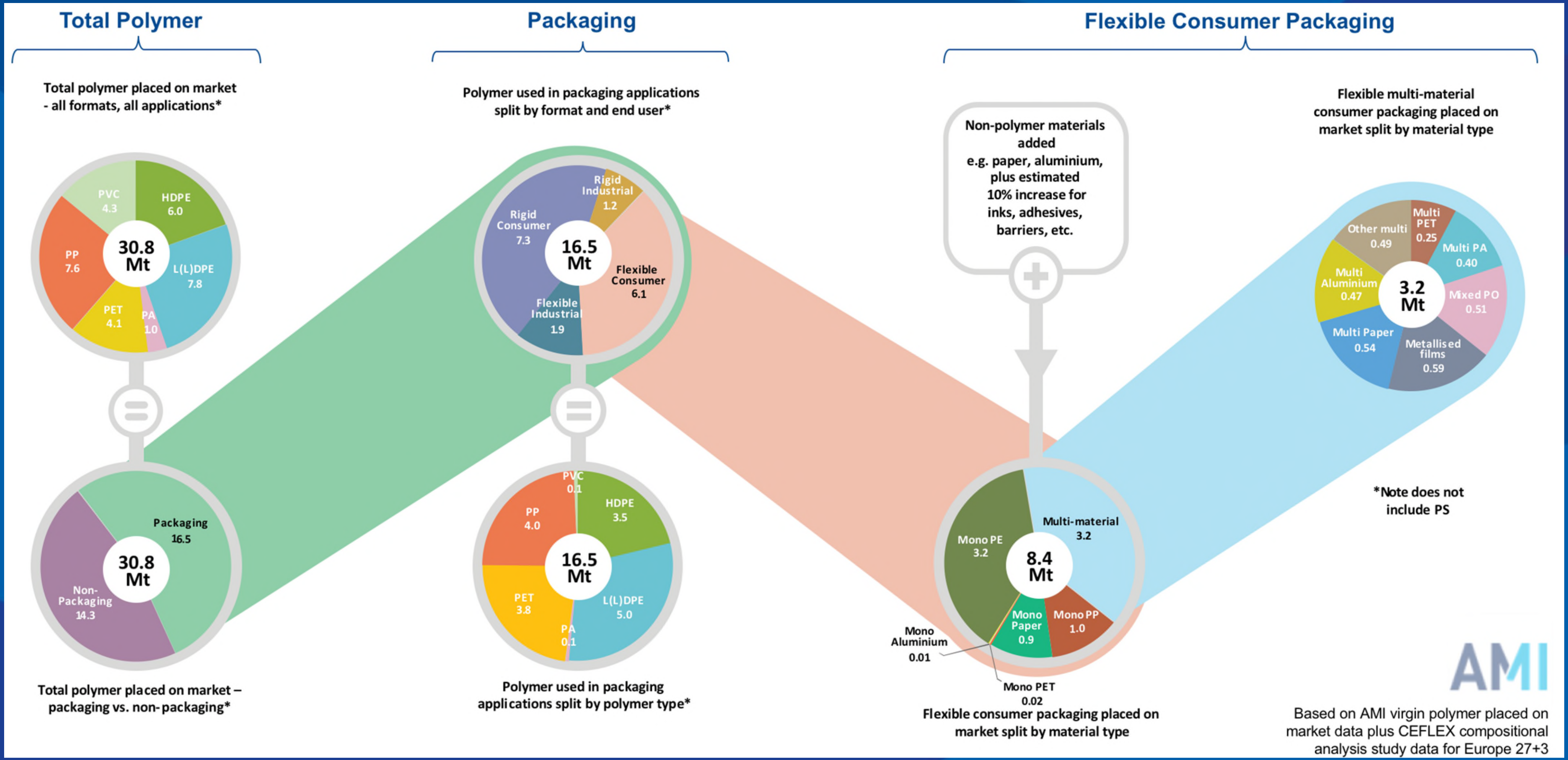
50 : 50 : 50

Packaging
~50% of total plastics market

Flexible packaging
~50% of plastic packaging

>50% of food portions use flexible packaging



***PET will be out of RR calculation given DRS, the pressure will be even higher in flexible**

Based on 2022 virgin polymer demand data in million tonnes

2025 – 2030+

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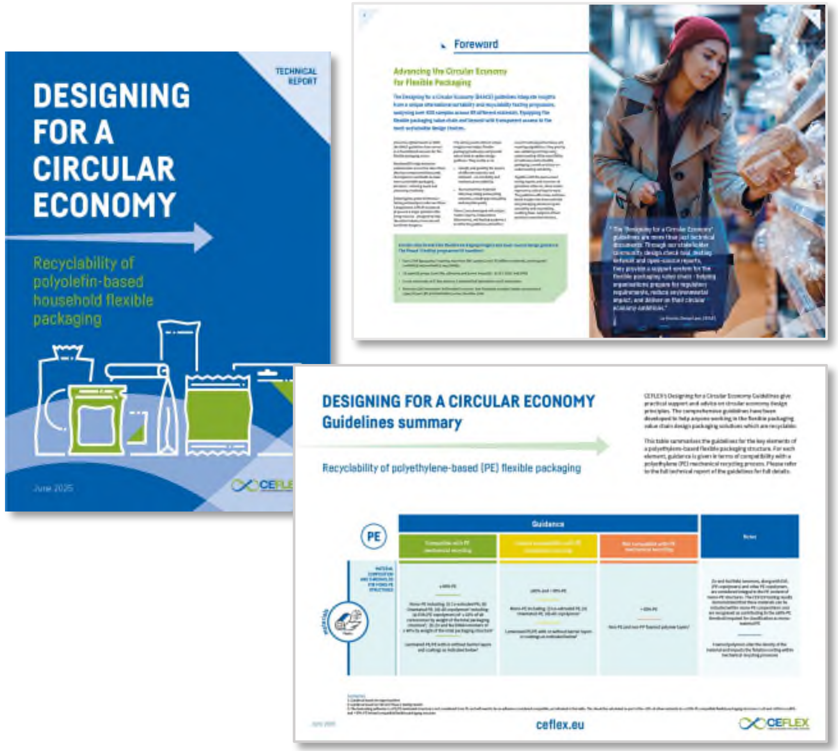
Sustainable design is no longer ‘optional’

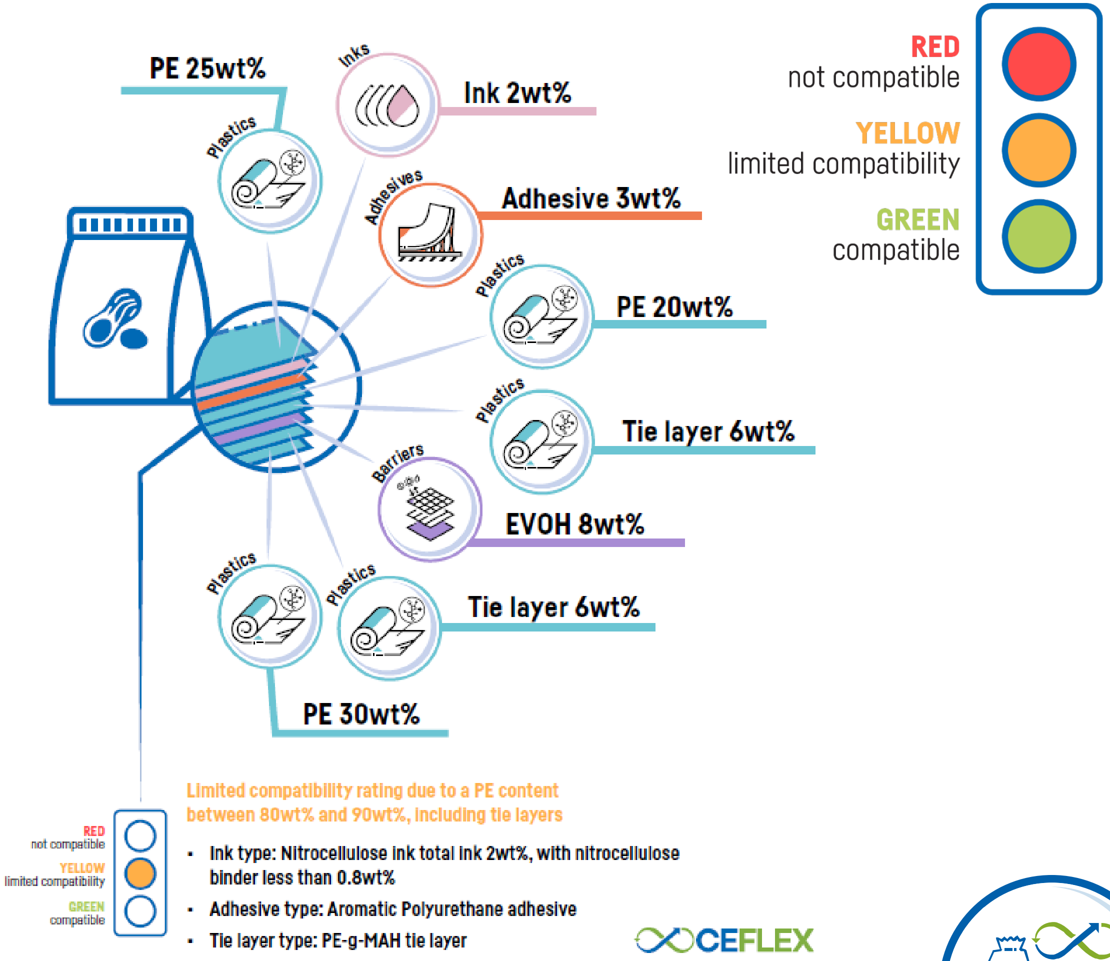
“Design is where the circular economy begins - if we don’t get it right at the start, we compromise everything that follows ”

1	BUSINESS CASE	• Market access (2030+) • Lower license fees due to lower costs of packaging recycling
2	QUALITY	• Higher yields, less incompatibilities • More end markets
3	CIRCULARITY & COMPLIANCE	Essential to achieving recycled content and recycling rate targets

How can we design flexibles with confidence?

Helping you and your organisation navigate 2025 – 2030+



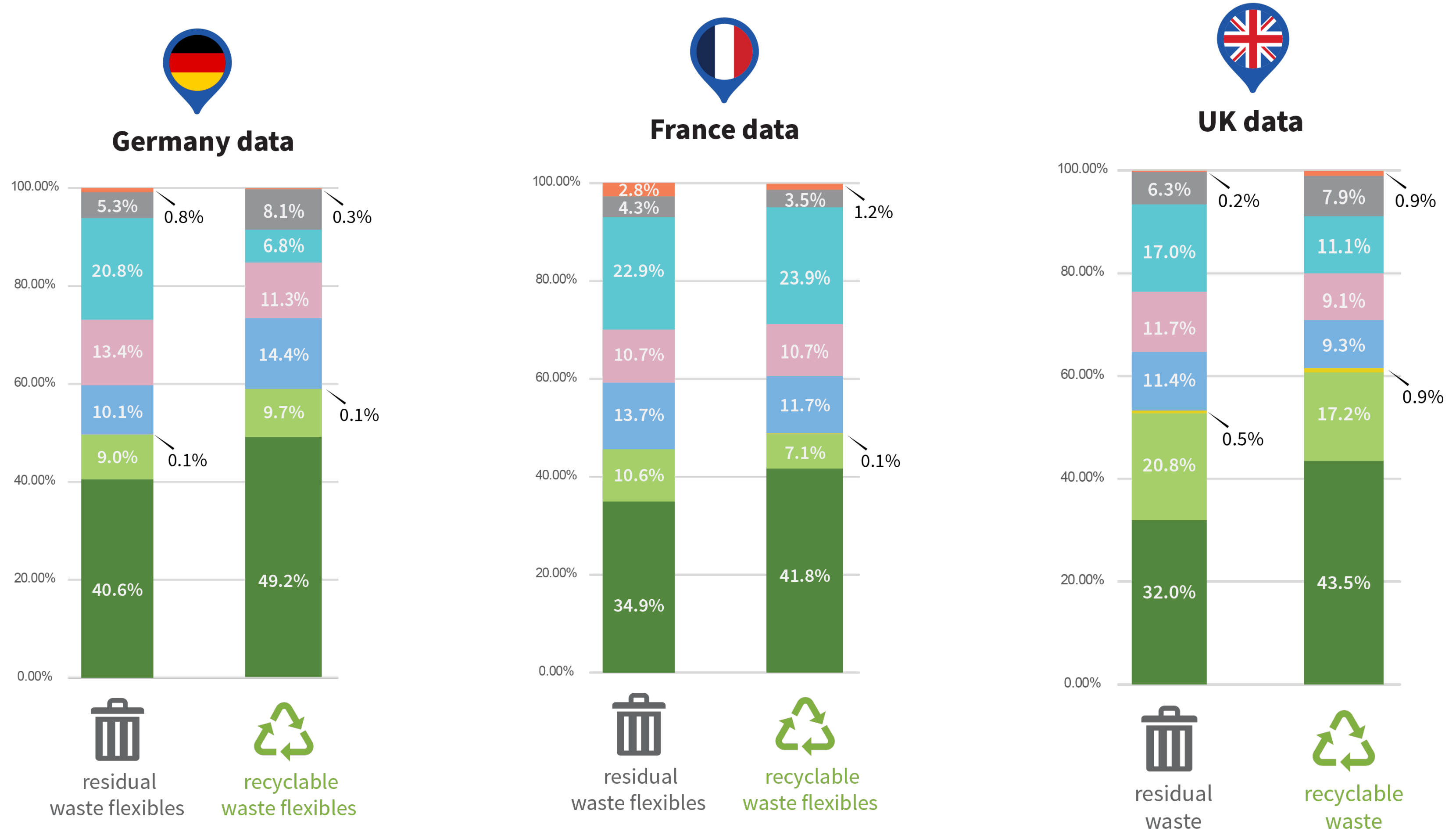


Open-access content
guidelines.ceflex.eu

Guidelines | **Tools** | **Testing**

Where does flexible packaging go?

Multi-country compositional analysis for flexibles in residual & recyclables waste streams



across 5 countries

40 - 60%
Mono-material in recyclable stream

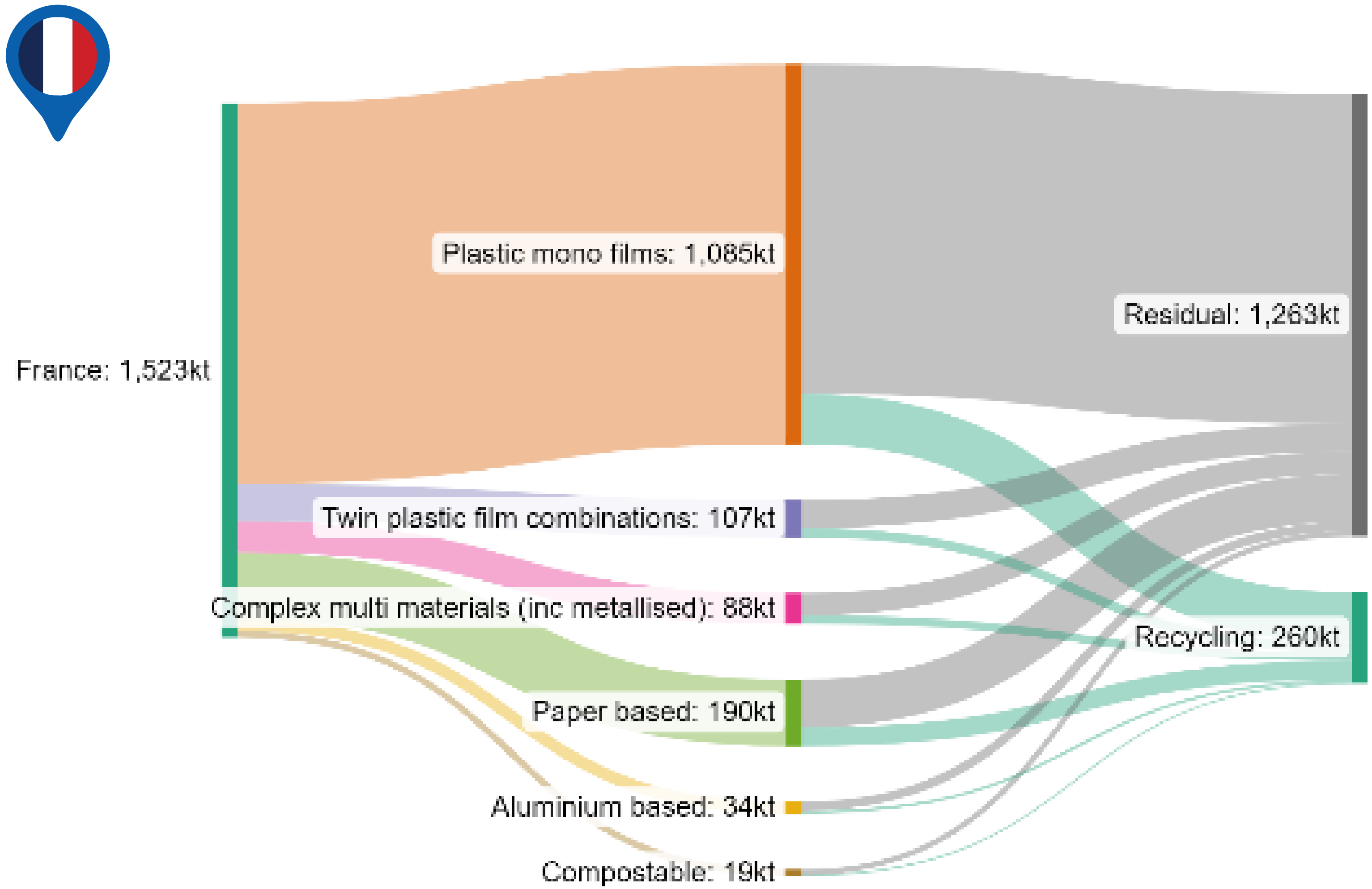
>30%
flexibles placed on market remain in the residual stream

Mono PE * | Mono PP | Mono PET | Multi-material – twin combinations | Multi-material – complex combinations** | Paper-based | Aluminium-based | Compostable and biodegradable

*not including carrier bags/bin liners **includes metallised films

Where does flexible packaging go?

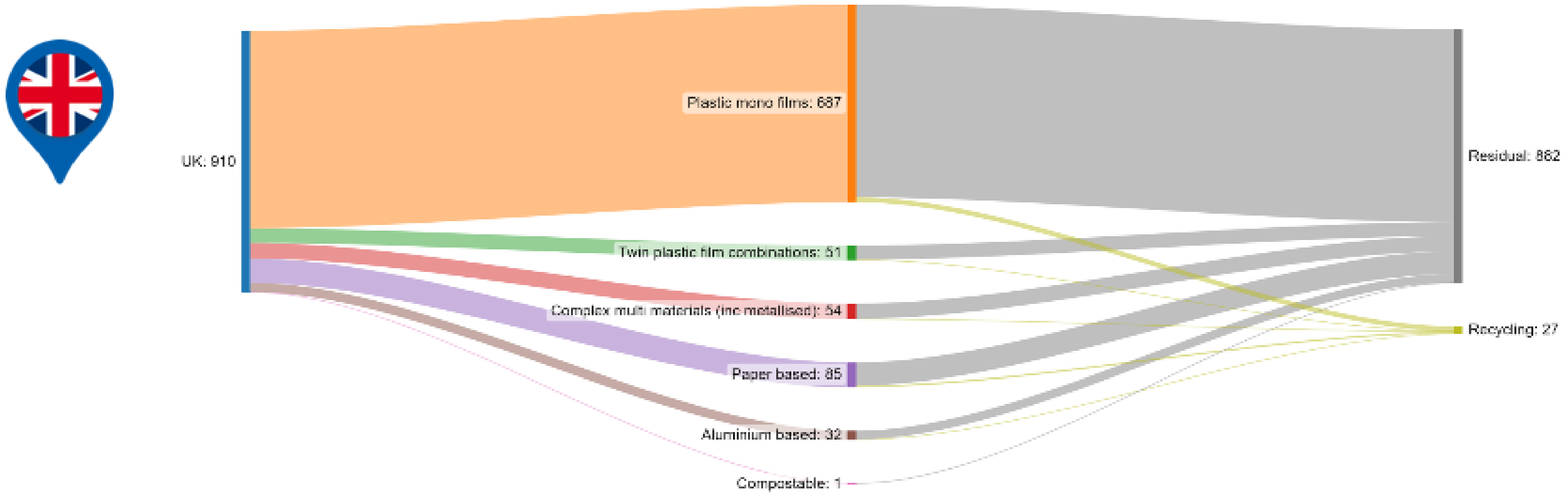
Multi-country compositional analysis for flexibles in residual & recyclables waste streams

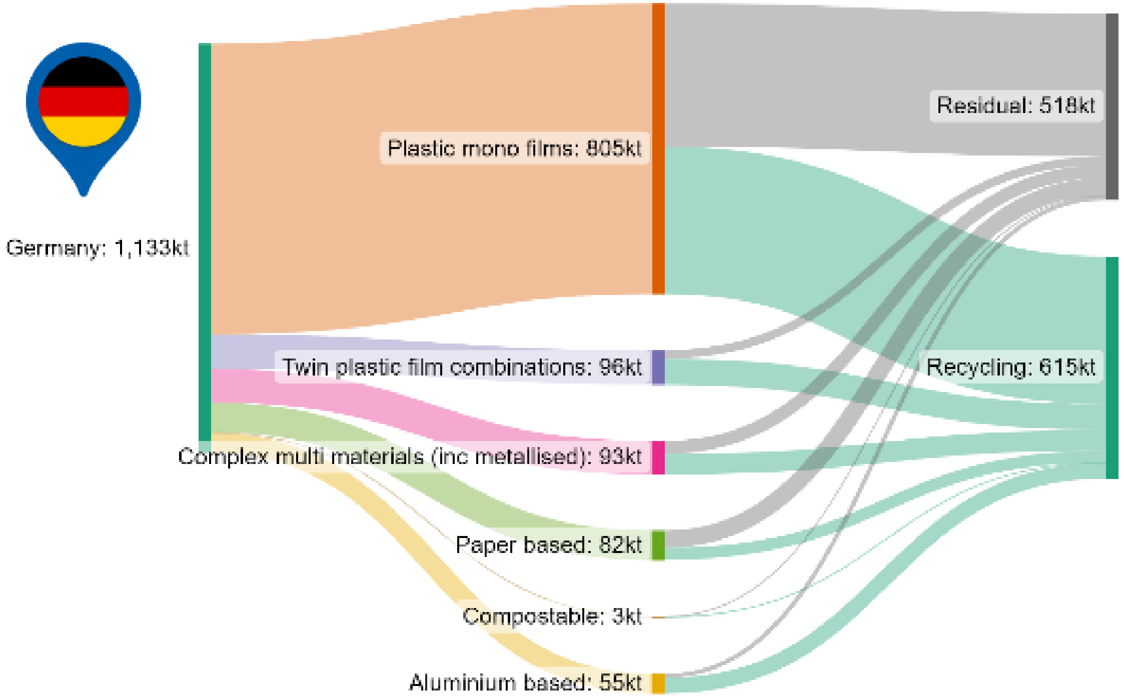


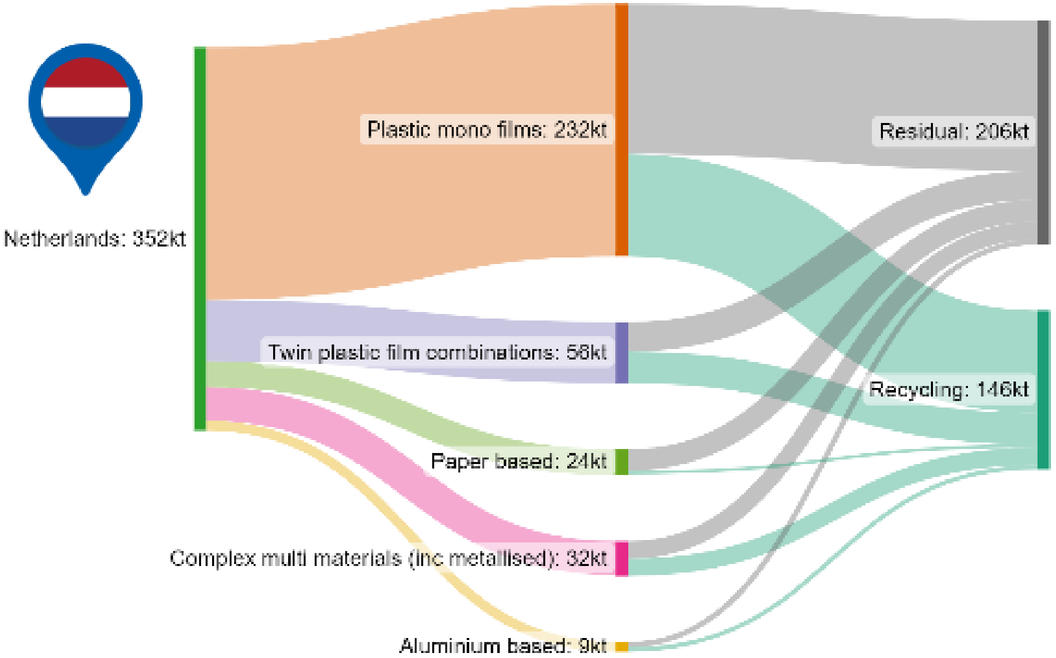
across 5 EU countries

40 - 60%
Mono-material in recyclable stream

>30%
flexibles placed on market remain in the residual stream


UK: 910
Plastic mono films: 687
Twin plastic film combinations: 51
Complex multi materials (inc metallised): 54
Paper based: 85
Aluminium based: 32
Compostable: 1
Residual: 882
Recycling: 27


Germany: 1,133kt
Plastic mono films: 805kt
Twin plastic film combinations: 96kt
Complex multi materials (inc metallised): 93kt
Paper based: 82kt
Compostable: 3kt
Aluminium based: 55kt
Residual: 518kt
Recycling: 615kt


Netherlands: 352kt
Plastic mono films: 232kt
Twin plastic film combinations: 56kt
Paper based: 24kt
Complex multi materials (inc metallised): 32kt
Aluminium based: 9kt
Residual: 206kt
Recycling: 146kt

Once recycled, what can it become?

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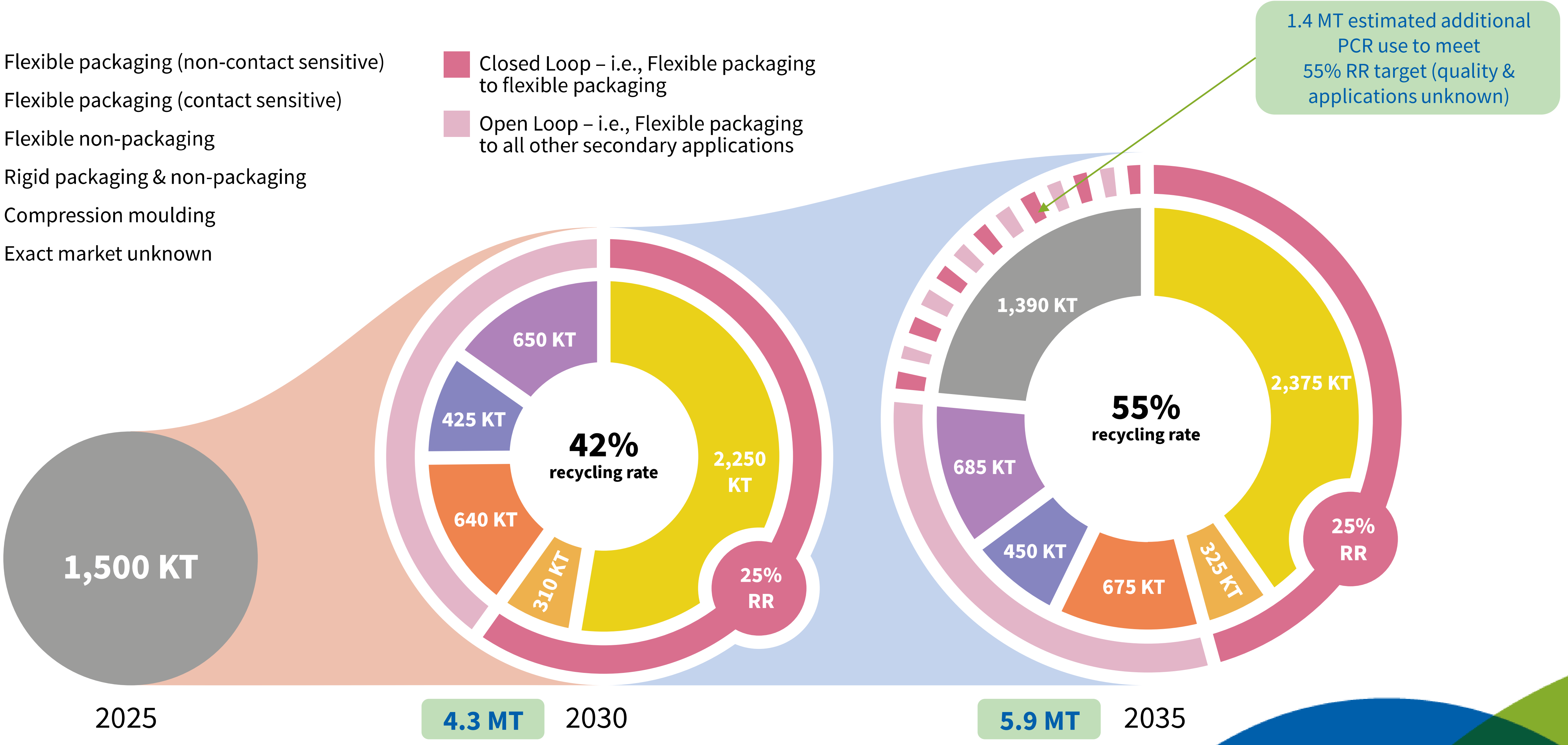
Flexible packaging PCR demand 2030-2035 and associated effective recycling rate

Key

- Flexible packaging (non-contact sensitive)
- Flexible packaging (contact sensitive)
- Flexible non-packaging
- Rigid packaging & non-packaging
- Compression moulding
- Exact market unknown
- Closed Loop – i.e., Flexible packaging to flexible packaging
- Open Loop – i.e., Flexible packaging to all other secondary applications



What recycling infrastructure to make it happen?

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A transformation of capacity and quality needed to deliver PPWR

2024

2.7 MT
Mechanical Recycling

Little-No Physical Recycling

< 100 KT
Chemical Recycling

2030

Mechanical Recycling
7.5 MT

Delamination, Deinking
250 KT

Extraction, Deinking
150 KT

Dissolution
700 KT

Chemical Recycling
800 KT

2035

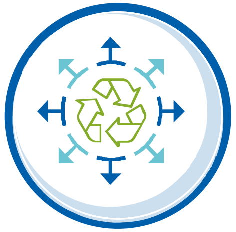
Mechanical Recycling
10 MT

Delamination, Deinking
400 KT

Extraction, Deinking
700 KT

Dissolution
700 KT

Chemical Recycling
800 KT



EU 27+3

A pivot from voluntary ambitions to legal obligations

So why is circularity under pressure ?

Critical secondary legislation gaps

Quality Vs Volume mismatch

EPR fragmentation

End market limitations

Accounting rules
RAM, Mass Balance

First mover (dis)advantage

In EU27+3 !

Accelerating DfR, scaling of a range of recycling technologies and functioning markets for recycled content across Europe will be key.

RAM = Recyclability Assessment Methodology

How to address the gap?

#MissionCircular in action

Country specific activities

2025

- Bulgaria
- Czechia
- Ireland
- Poland
- Portugal
- Romania
- Slovakia
- Spain
- United Kingdom

2026

- Austria
- Denmark
- Finland
- Greece
- Norway
- Sweden
- Switzerland

Targeted projects to Projects to **catalyse** – **support** - **collaborate** according to maturity

Navigate these challenges with us

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