



*EU Legislation leads to a global trend
towards Deposit Return Systems*



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reloop™
resources remain resources

- Mandated **Minimum recycled content** in products and packaging
- Increased market share of **reusable packaging (B2B and B2C)**
- Effective implementation of new rules for **reuse & recycling calculations, reporting & transparency**
- Introduction of **deposit return systems** for beverage containers
- Increased **collection and sorting** systems



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Important European Legislative Trends



The three main EU institutions

Parliament

Co-legislator

No EU law can pass
without support of EP

Seats in Strasbourg,
Brussels, & Luxembourg

751 MEPs, 28 Nationalities,
23 languages

8 Political groups, 23
Committees



Commission



Executive branch

Initiates legislation

Ensures implementation of
legislation

33 specialised Directorates-
General (DGs) similar to
national ministries

Agencies (EMSA, EEA, ...)

Council

Co-legislator

The voice of EU Member
States (Governments)

Different configurations
(environment, industry etc)

Qualified Majority Voting in
most areas. MS have votes
broadly according to
population



Lightweight Plastic Carrier Bags

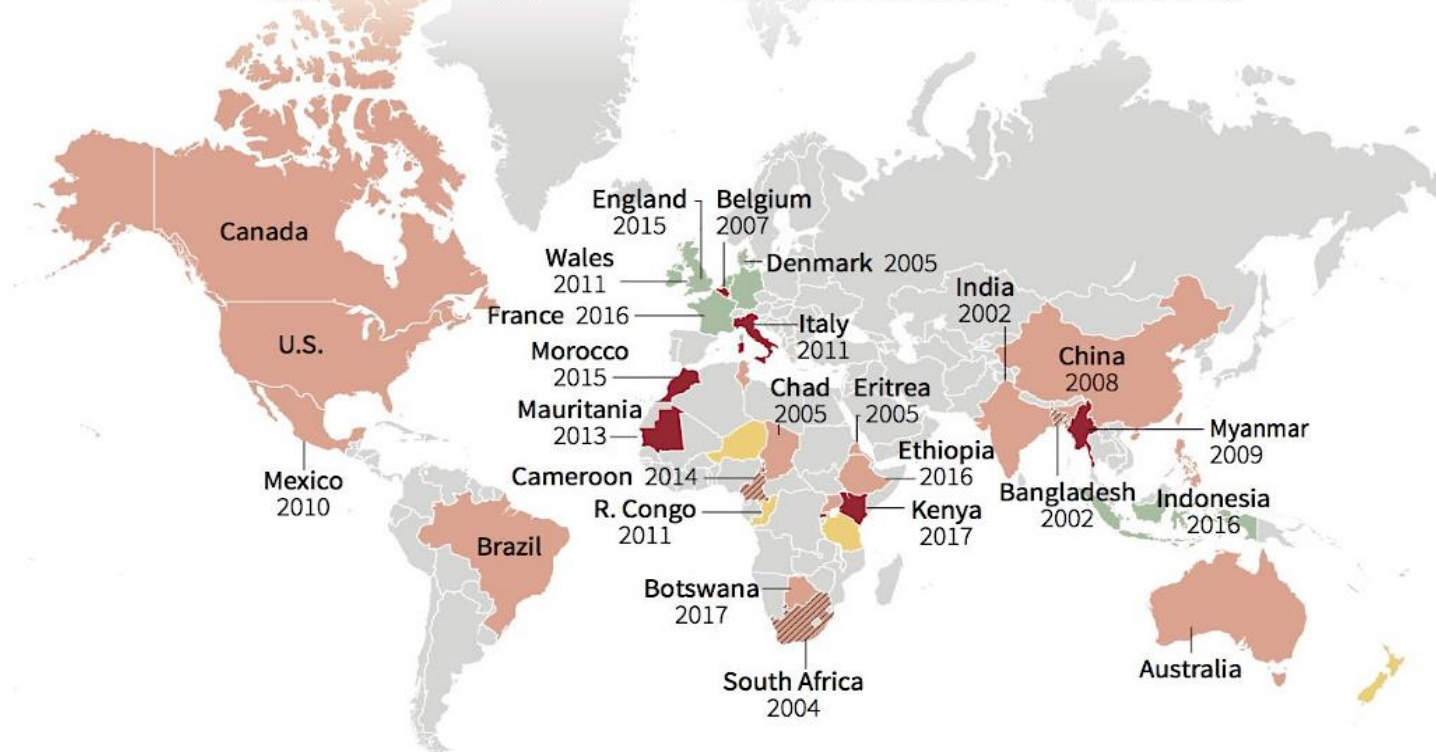
Packaging & Packaging Waste Directive (Article 4. 1. a)

- Annual consumption level **does not exceed 90 lightweight plastic carrier bags** per person by 31 December 2019, and
- **40 lightweight plastic carrier bags** per person by 31 December 2025.
- Measures may include the use of **national reduction targets**, maintaining or introducing **economic instruments** as well as **marketing restrictions**
- By 31 December 2018, lightweight plastic carrier bags **are not provided free of charge** at the point of sale of goods or products, unless equally effective instruments are implemented.

Countries with plastic bag bans

Type of ban in countries with available reports

- Full country ban
- Localised bans/partial bans*
- /// Ban could include jail term**
- Ban not yet implemented/under consideration
- Tax, charges or other measures instead of fines



Sources: UNEP; Greenpeace; national governments. *Countries without dates have bans placed on various dates. **For some cases.

G. Cabrera, 28/08/2017

REUTERS

Jan. 1, 2019 – ban on free plastic bags as part of the government policy to reduce pollution in Turkey

prohibited free of charge except for small sized plastic bags ranging from 15 to 50 microns in a bid to protect food sold openly.

Stores to charge 0.25 Turkish liras (4 U.S. cents) for a single-use plastic bag or offer bags which are partially made from recycled materials.

Circular Economy Package

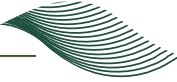
December 2015

- **CEP is comprised of:**
 - Legislative proposals for amendments on waste laws (“hard law”)
 - Commission Communication: *Closing the loop—An EU action plan for the Circular Economy* (COM(2015)614) (“soft law”)





Final Legislative Amendments Published (May 2018)

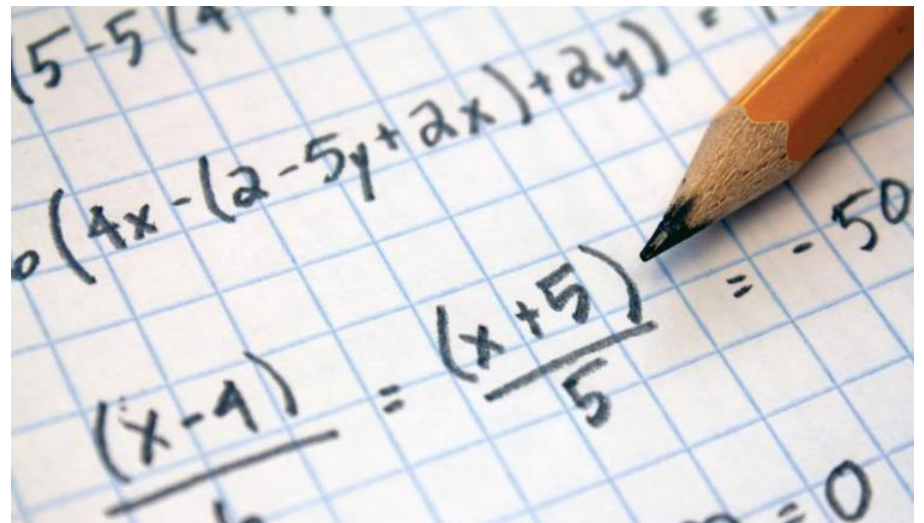


- ✓ A **cap on landfilling** of waste to 10% by 2035
- ✓ A **65% binding target for recycling** of household waste by 2035
- ✓ Packaging targets by 2025 / 2030: **Plastics: 50%/55%**; aluminum 50%/60%; Steel 70%/80%; glass 70%/75%; paper and paperboard 75%/85%.
- ✓ A **new recycling calculation**, which moves the point of measurement to the input of the final recycling facility - after all sorting has taken place. **Contamination and losses must be removed from the weight of recyclables being reported.**
- ✓ EPR: **producers will be required to pay for up to 80% of the costs** for new EPR programs and EU programs and 50% for existing national programs.



New recycling calculation method to **net out contaminants in collection and** new rules on reporting weight of **packaging waste generated.** (by spring 2019).

New methodology for calculation and verification of **“collection for recycling” target for in SUPD.** (by spring 2020).



ANNEX I

Non-exhaustive list of calculation points referred to in article 6(2)

Material	Calculation Point
Glass	Sorted glass that does not undergo further processing <u>before</u> entering a glass furnace or the production of filtration media, abrasive materials, glass fibre insulation and construction materials.
Metals	Sorted metal that does not undergo further processing before entering a metal smelter or furnace
Paper / board	Sorted paper that does not undergo further processing before entering a pulping operation
Plastics	<p>Plastic separated by polymer that does not undergo further processing before entering <u>pelletisation</u>, extrusion, or moulding operations;</p> <p>Plastic flakes that do not undergo further processing before their use in a final product.</p>

PPWD, Article 5(1): Reuse

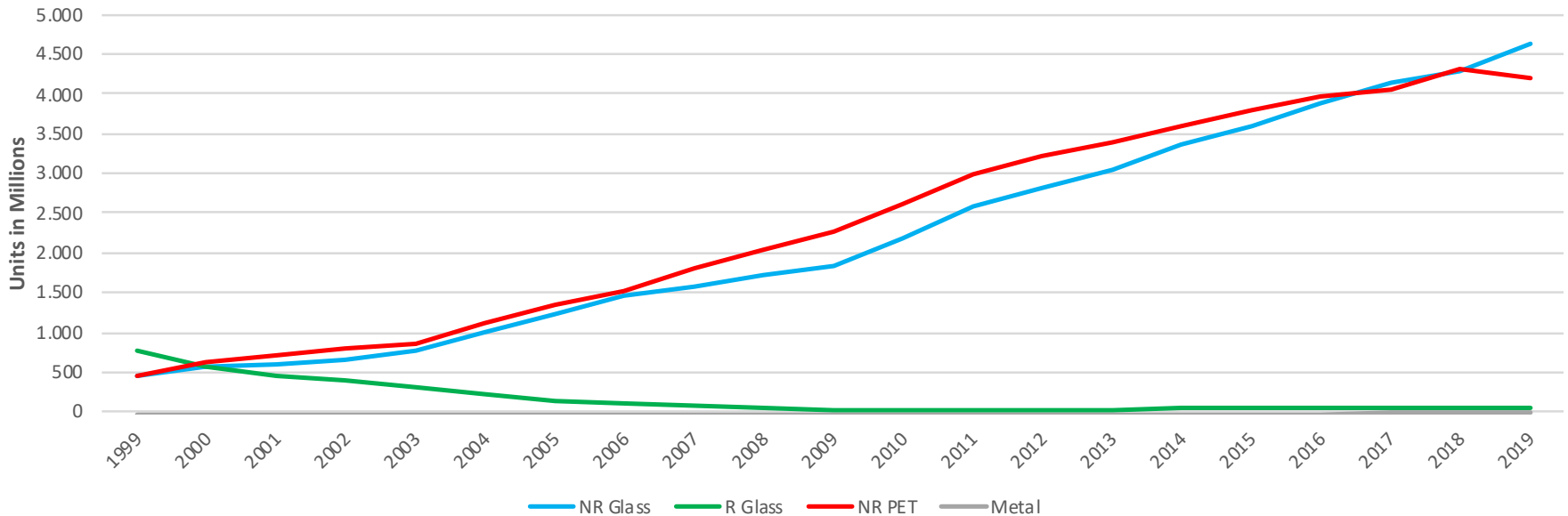
Member States shall take measures to encourage the increase in the share of reusable packaging placed on the market and of systems to reuse packaging...

Such measures may include:

- (a) use of **deposit-return schemes**;
- (b) setting of **qualitative or quantitative targets**;
- (c) use of **economic incentives**;
- (d) setting up of a **minimum percentage** of reusable packaging placed on the market every year for each packaging stream.



Sale of Water, by Material,
Turkey, 1999 - 2019

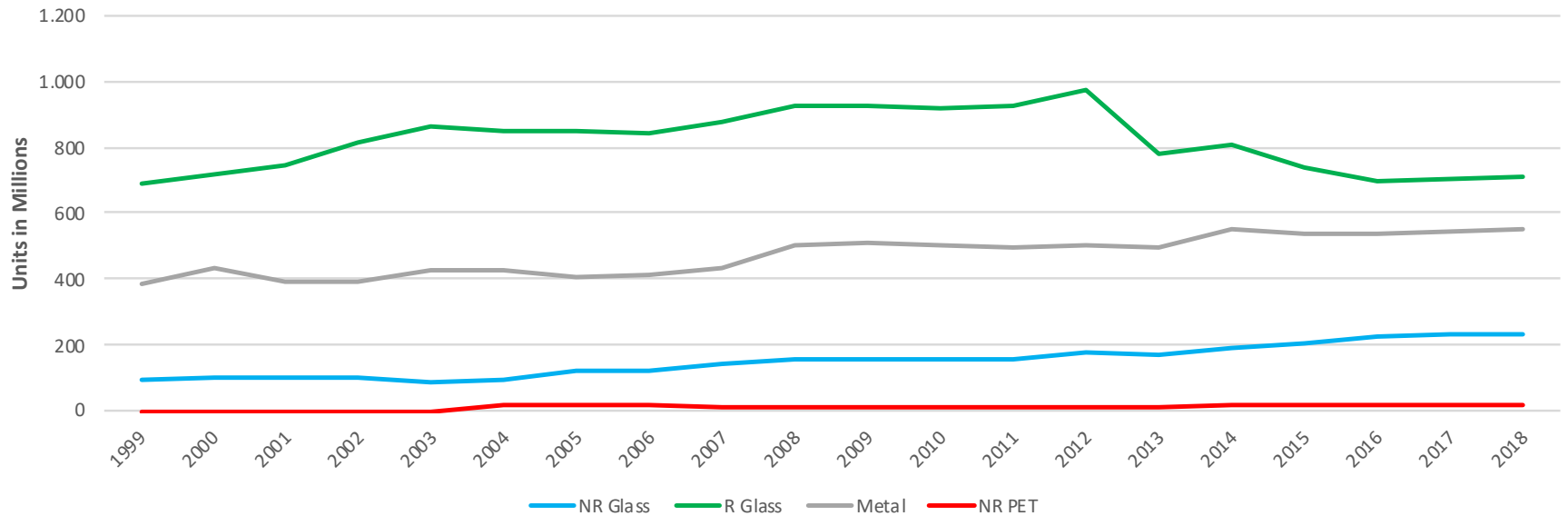


Refillable Glass Market Share:
WATER

1999: 44%
2018: 1%



Sale of Beer / Cider, by Material, Turkey, 1999 - 2018



Refillable Glass Market Share: BEER

1999: 59%
2018: 47%





May 2018, European Commission tables **Single Use Plastics Directive**

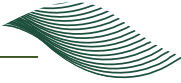
December 19, **Trilogue agreement reached**

July 2019 – **published**





Single-use plastic products **banned** from the marketplace **as of 2021**.



- Cotton bud sticks (with medical-use exceptions)
- Cutlery (forks, knives, spoons, chopsticks)
- Plates
- Straws, stirrers
- balloon sticks
- Oxo-degradable plastics and
- Expanded polystyrene (EPS) food containers and cups

NO SINGLE-USE PLASTICS



cutlery



cotton buds



straws



stirrers

•Producers of specific single use plastic products **must pay into an Extended Producer Responsibility program that must cover the costs of**

- collection
- transport
- Treatment and
- clean up litter
- awareness raising measures

- Food containers
- Packets and wrappers
- Beverage containers including their caps & lids
- Cups for beverages
- Tobacco products with filters
- Wet wipes
- Balloons
- Lightweight plastic carrier bags



Article 9 collect separately for recycling, beverage bottles with a capacity of up to three litres, including their caps and lids

- no later than by **2025**, an amount of waste single-use plastic products listed in Part F of the Annex equal to **77%** of such single-use plastic products placed on the market in a given year by weight;
- no later than by **2029**, an amount of waste single-use plastic products listed in Part F of the Annex equal to **90%** of such single-use plastic products placed on the market in a given year by weight.

In order to achieve that objective MSs may inter alia:

- a) establish deposit-refund schemes, or
- b) establish separate collection targets for relevant extended producer responsibility schemes.



Higher targets for PET Recycling



Voluntary Commitment/Pledges

- ✓ PET Industry target of 65% by 2030
- ✓ European Federation of Bottled Water commitment of 90% collection by 2025

Legislated

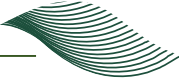
- ✓ PPWD: Plastic packaging recycling 55% by 2030
- ✓ SUPD Plastic beverage bottles with caps collected for recycling, 90% by 2029

Defined in SUPD as:

“Beverage bottles with a capacity of up to three litres, including their caps and lids”



Product requirements



- Single-use plastic beverage container **caps and lids remain attached to the container during the product's intended use stage. (by 2024)**
- Beverage bottles must be made from **25% recycled rPET by 2025, and 30% in 2030 recycled plastic – all kinds.**



May 15, 2018

- ✓ Collect 90% of all PET bottles by 2025, as an EU average.
- ✓ Use at least 25% recycled PET (rPET) in its water bottles by 2025, as an EU average.
- ✓ Innovate and invest further in eco-design and research on non-fossil based **plastic materials**.





Rising Demand in Recycled Content - rPET



- **Proctor & Gamble** – Goal to have 99% of all hair care bottles sold in Europe converted to include 25% post-consumed recycled content by the end of 2018
- **Danone / Evian** – Announced that it will make all of its plastic bottles from 100% recycled plastic by 2025
- **Ecover** – Has set a goal to use 100% recycled plastic in all bottles by 2020 and to introduce recycled content into its caps from 2018
- **Nestle** – Goal to increase its use of recycled plastics, including the use of 25% rPET in its bottles across Europe by 2025
- **Coca Cola** – Goal to have 50% recycled content in its packaging by 2030
- **Unilever** – Goal to increase use of recycled plastic content in its packaging to at least 25% by 2025 (compared to 2015)
- **Werner & Mertz** – Has committed to use 100% recycled plastic in at least 70 million bottles/year as of 2017



THE TOP TEN

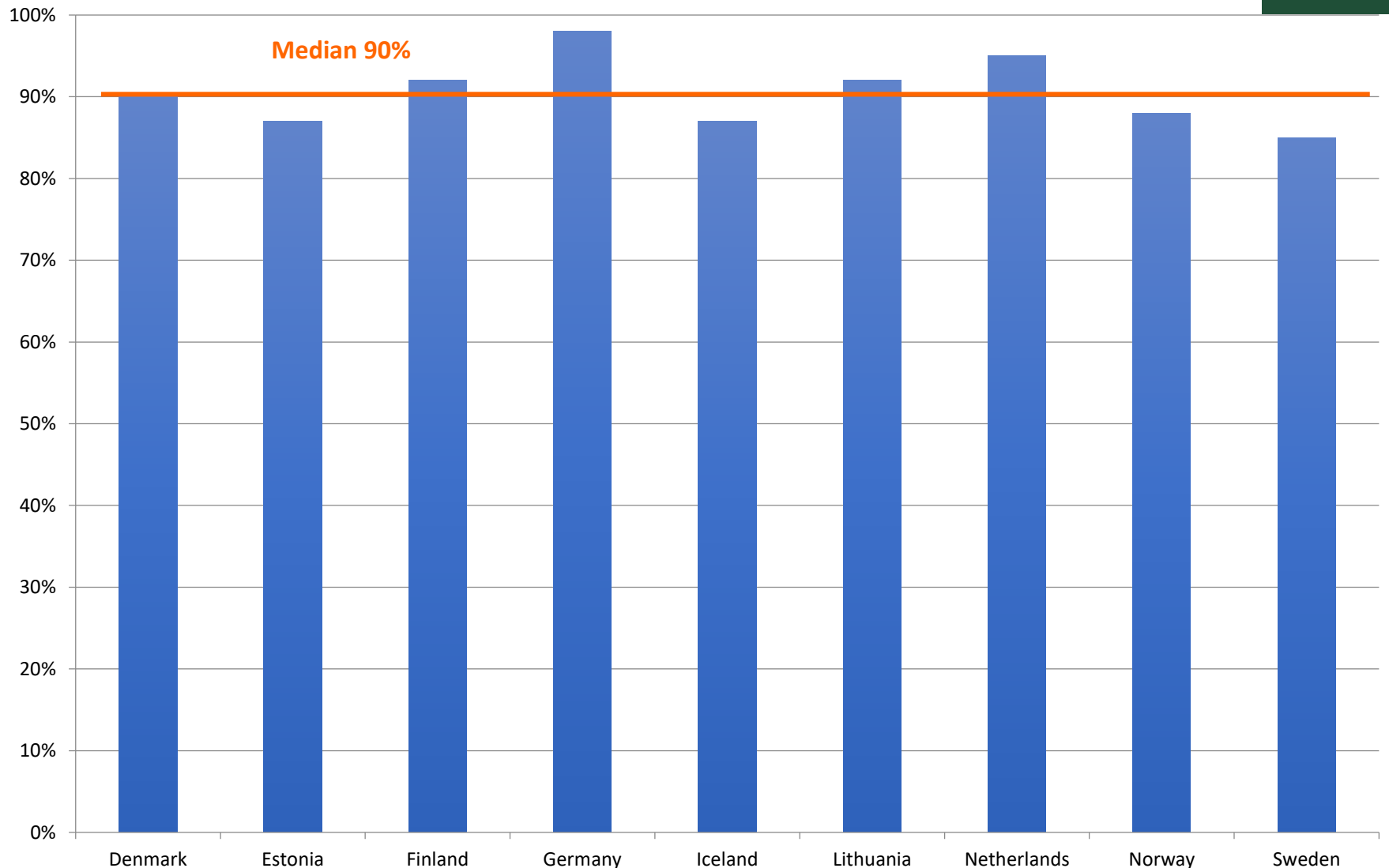
PLASTIC POLLUTERS 2018



#breakfreefromplastic

DRS Update

Plastic Bottle Return/Recycling Rate in 9 European Countries with Deposit Return



And what about the Caps ?



Reloop asked:

“ We are gathering some data about the percent of PET bottles which come back with caps on in a deposit return system. Can you each provide your own ranges based on your own program’s and experience?”

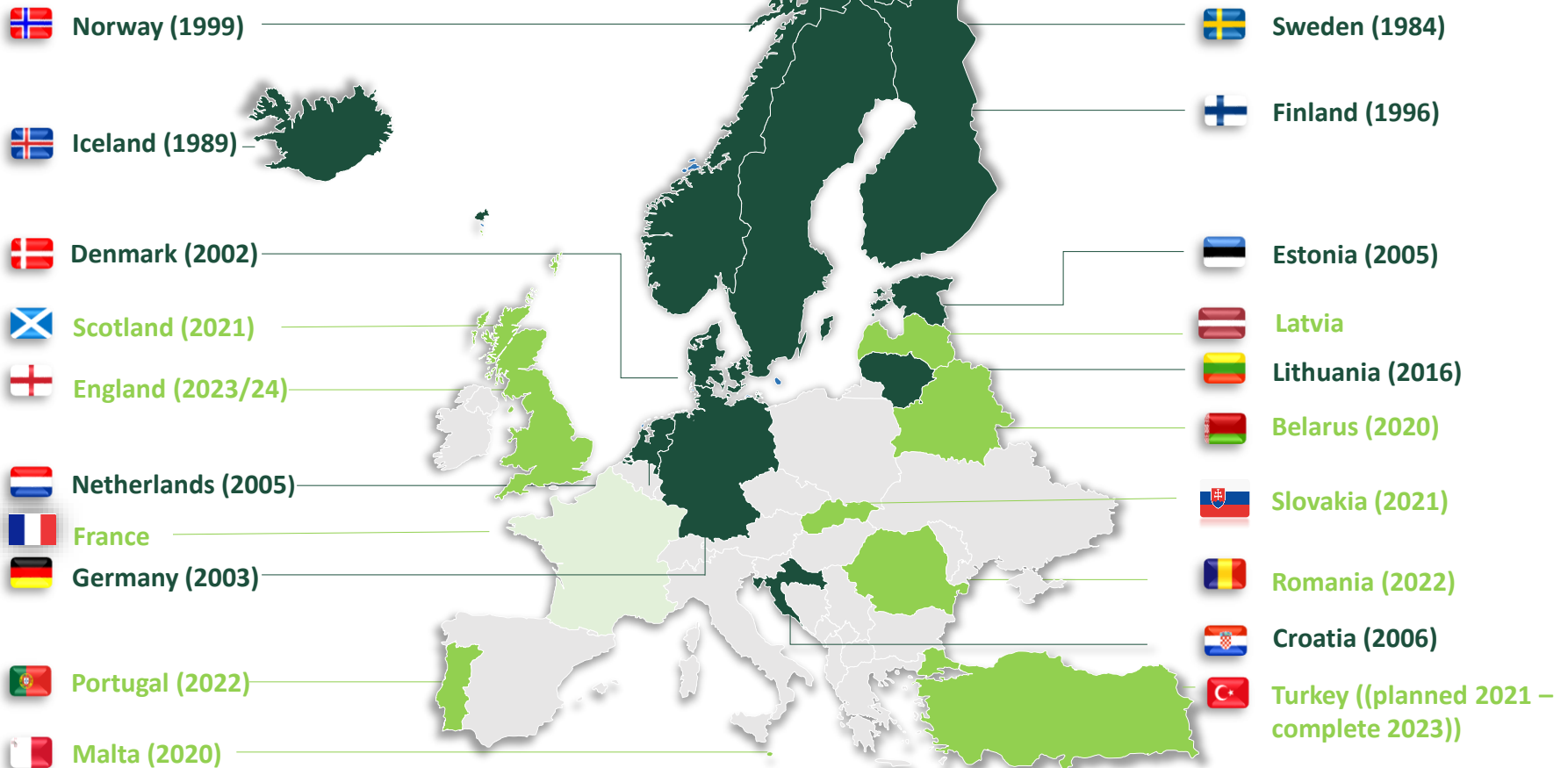
Approximately 90%-99% of plastic bottles have their caps on.

Respondents from system operators in Norway, Estonia, Lithuania, Oregon.

The German Packaging Institute GVM did a short study/analysis on the cap topic, commissioned by IK
Industrieverband Kunststoffverpackungen e.V.

Deposit systems in Europe

Deposit return systems in operation and **planned**



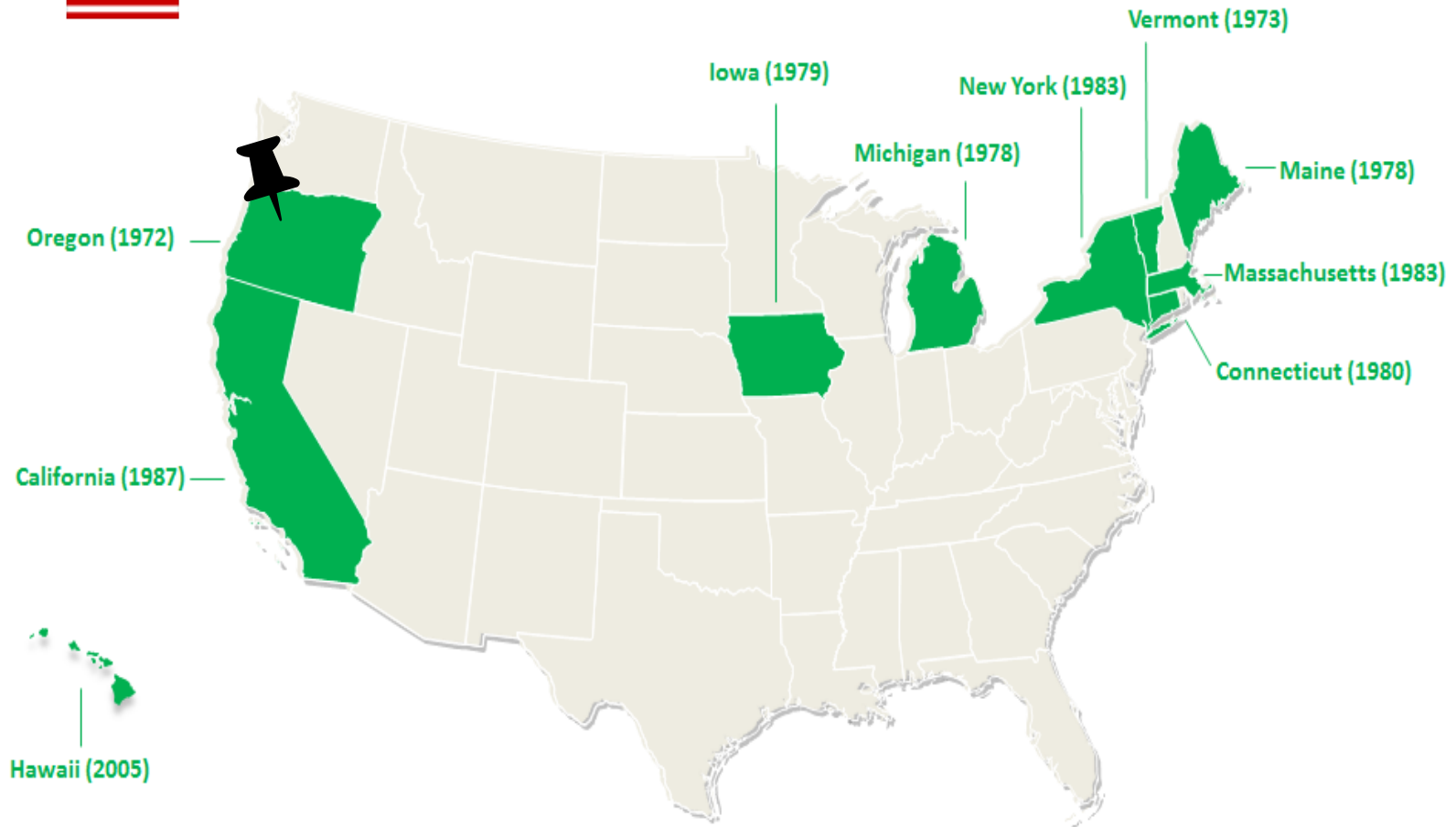
More and more countries implement deposit schemes. At least for one way PET and cans.

DRS Action Across the Globe

- The latest jurisdiction to implement a DRS was
- **NEW SOUTH WALES , DECEMBER 1, 2017**
- **QUEENSLAND, NOVEMBER 1, 2018**
- **WESTERN AUSTRALIA, EXPECTED BY 2020**
- **VICTORIA, LIKELY BY 2021.**

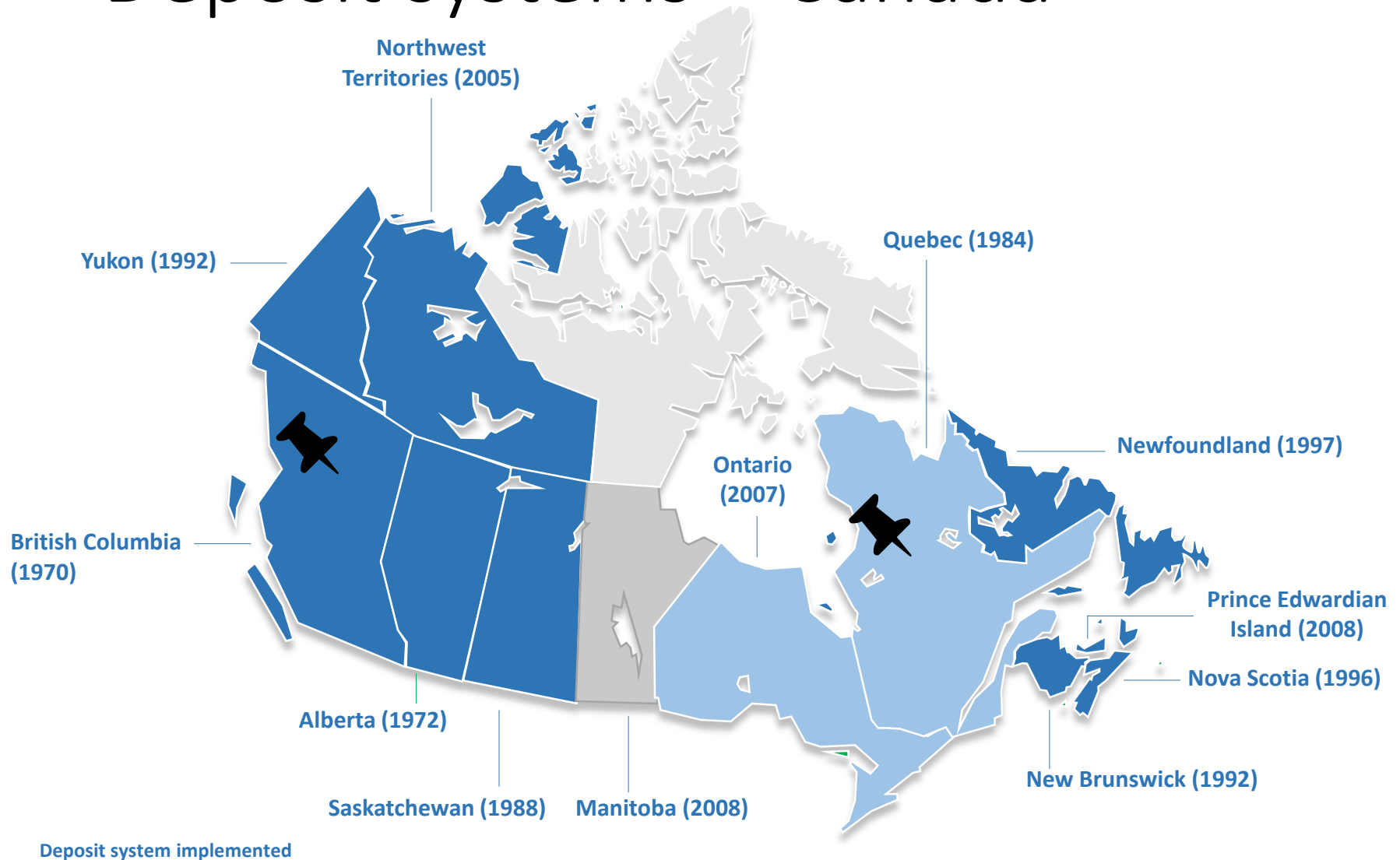


USA





Deposit systems – Canada



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resources remain resources