

**Activating Your Packaging Sustainability Goals** 





Nina Goodrich
Executive Director
Sustainable Packaging Coalition



### Questions we hear

- How can I replace plastics (at any cost)?
- What is next? Fear of being Shamed and Named.
- What don't we know?
- Are we moving fast enough? Are we just using band-aids?
- It's not black and white.
- Are we making regrettable substitutions?
- What are we missing?

Are we missing the point?



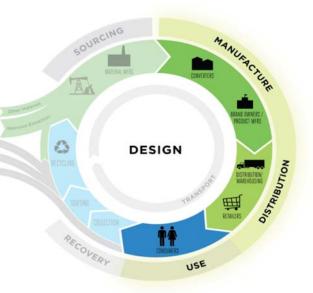
Climate Change Circularity Regeneration Resilience

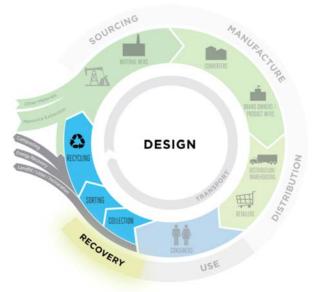


## It's important that we remember the job we are hiring packaging to do













Design Optimization



**Effective Recovery** 



Enabling circular, regenerative, resilient supply chains

Sourcing Optimization

Enabling circular, regenerative, resilient supply chains

Effective, resilient supply chains

**Effective Recovery** 

### Our goals help us get there

### **Setting Goals**

Building momentum for desired outcomes through goal adoption

### Implementing Goals

Facilitating change with concrete actions and reporting

#### **Activating Your Packaging Sustainability Goals**

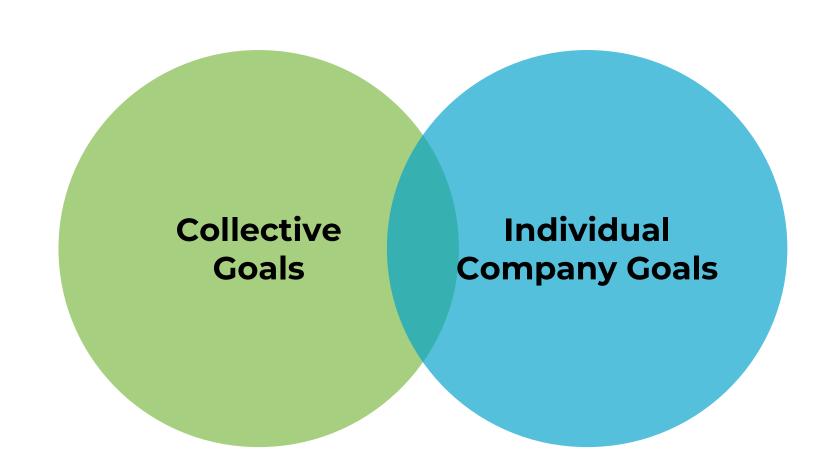




### Laying the Groundwork for Packaging Goals Execution

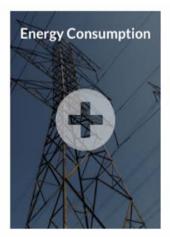


Tristanne Davis
Senior Manager
Sustainable Packaging Coalition





### **Corporate Sustainability Goals**













# PréjectGigaton















### Packaging Sustainability Goals



















### **Responsible Sourcing**





















### **Design Optimization**























### **Effective Recovery**

























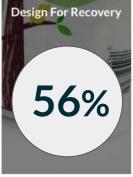


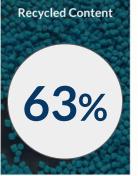
















A Goal is commitment to work towards achieving a specific sustainability outcome

"By 2025, 100% of our packaging will come from renewable, recycled or certified sources."

### "Statement of Support"

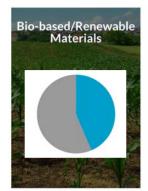
"As part of our dedicated commitment to sustainable packaging, we encourage all our suppliers to increase responsible fiber sourcing, giving preference to third party certified fiber, when available."

# Goals are better than statements of support

### 56% of companies

in the SPC's Goals
Database have
sustainable
packaging goals

30% of companies in the SPC's Goals Database have statements of support only











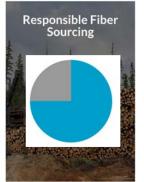














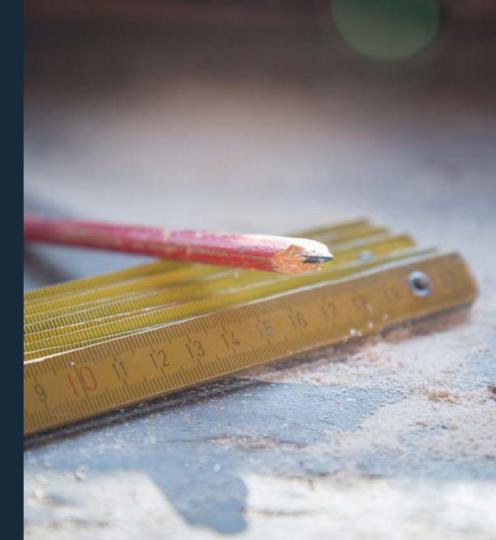






- (1) Target Date
- (2) Target Achievement
- (3) Baseline Date
- (4) Baseline Measurement
- (5) Metric

Making measurable goals can help you track and report on your progress





Structure your goals in a way that expresses desired intent of the goal.

#### **Desired intent:**

Decouple plastic from fossil feedstocks

#### **Goal:**

"Use only renewable <u>or</u> post-consumer recycled content for plastic packaging."



### Some catch-all goals give flexibility to achieve a specific desired outcome

"Use only renewable <u>or</u> postconsumer recycled content for plastic packaging."

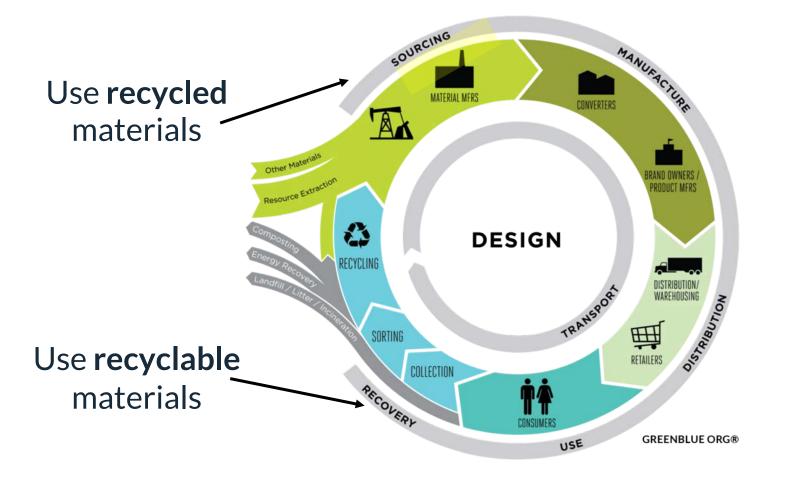
SOURCING Use recycled or renewable MATERIAL MFRS CONVERTERS materials Resource Extraction PRODUCT MFRS **DESIGN** RECYCLING WAREHOUSING RETAILERS SORTING COLLECTION

**GREENBLUE ORG®** 

USE

# Some catch all goals express **multiple desired intentions** in one goal.

"100% of our packaging will be recycled <u>or</u> recyclable ."



# It is best to communicate different desired outcomes as separate, **distinct objectives.**

"Use recycled plastic."

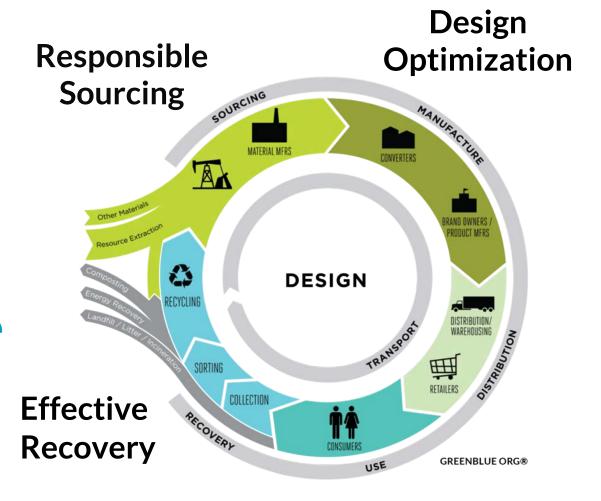
"Use recyclable plastic."

"Use recycled content in plastic packaging <u>and</u> make all plastic packaging recyclable."





Sustainable packaging goals should be **complete** 



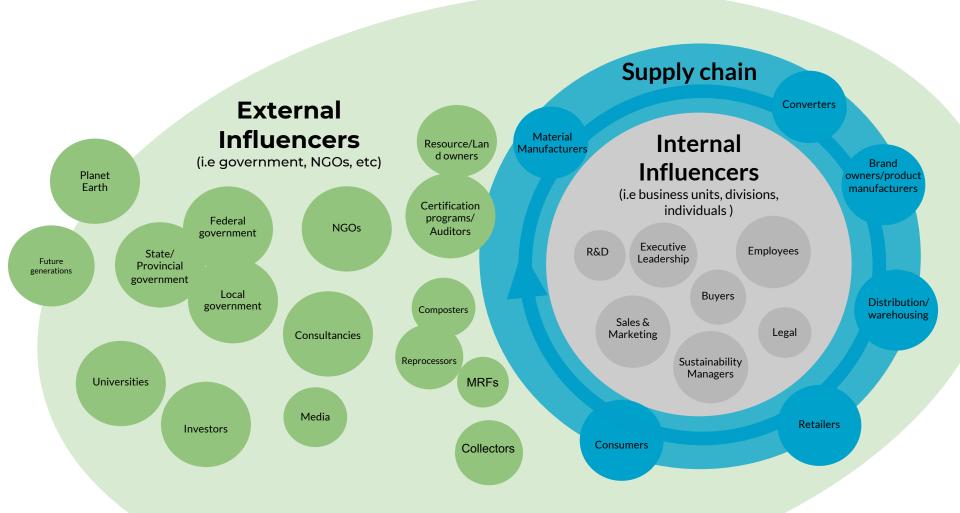




Culture and mindset play a huge part in whether or not a company is willing to take on the risk to make ambitious, public goals.

93% of the largest 250 companies in the world and 75% of mid and large-cap companies globally report publicly on sustainability

### When setting goals, Engage key stakeholders & contextualize their input



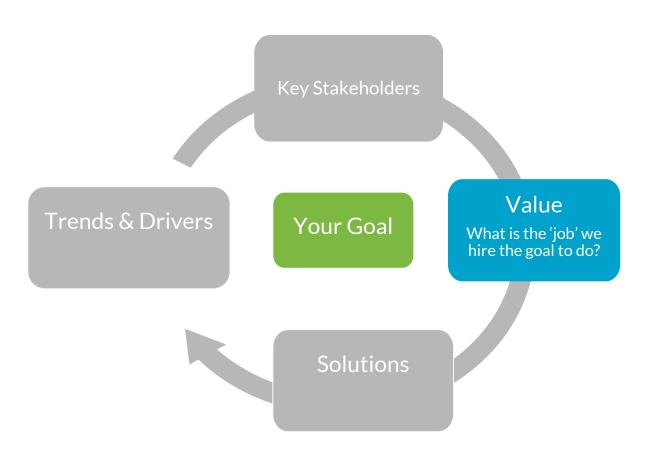
#### **Activating Your Packaging Sustainability Goals**



## Activity: Identify the most important customer

- 1. Who do you want to please with this goal?
- 2. Who executes the goal?
- 3. Who stands to lose or is blamed if you don't meet it?
- 4. Who is the beneficiary?
- 5. Based on the answers, who is the most important customer?

#### **Activating Your Packaging Sustainability Goals**



### **Activity:**

#### Identify the jobs you hire the goal to do

Most important customer (from previous activity)	What is the value of this goal to the most important customer(s)? How does it improve their experience?  Pick your top three!	How can these be observed in a measurable way (quantitative or qualitative)?
E.g. Brand owners (executive leadership)	Build trust between customers & the company Provide risk assurance against deforestation	Positive consumer social media posts; growth in new business Number of publicity issues

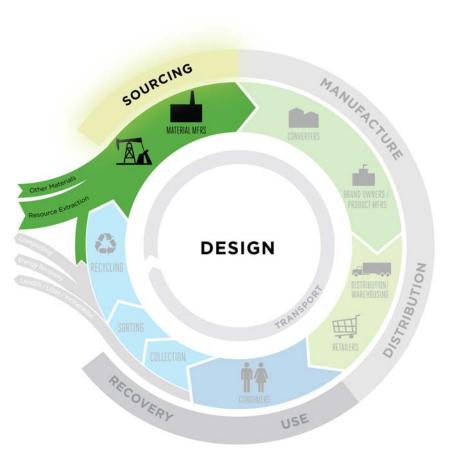




### Using Responsibly Sourced, Optimized Materials in Packaging



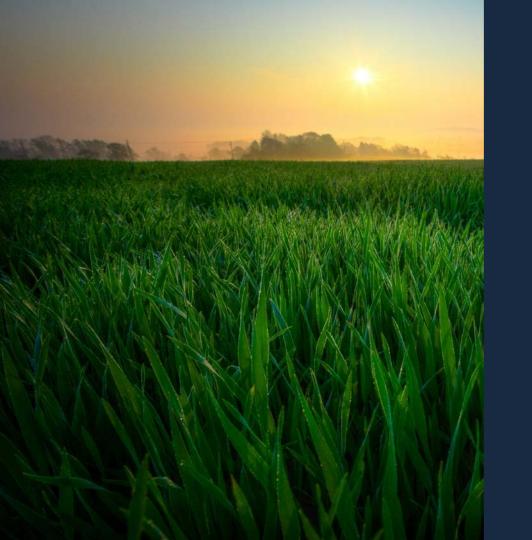
Laura Thompson
Project Lead, Recycled Materials Standard
Sustainable Packaging Coalition



## Responsible Sourcing

- Renewable materials (bioplastics, fiber)
- Recycled materials
- Eliminate toxic materials





Goals to source biobased/ renewable materials

## Some goals specifically emphasize **renewable materials**



"We aim to offer consumers bottles made of 100% renewable plastic (bioPET) by 2025."



"Create technologies by 2020 to substitute top petroleum-derived raw materials with renewable materials, as cost and scale permit."

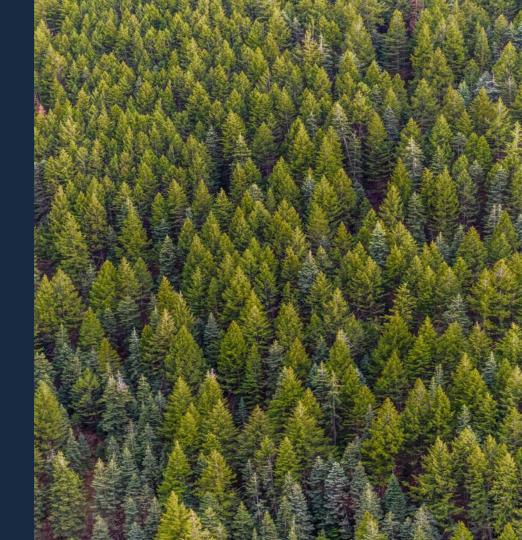
### Most goals specify Renewable **or** Recycled





"Achieve a minimum of 25 percent recycled content for all plastics and/or 20 percent of plastics to be bio-based alternatives."

"By 2020 – Develop the next generation of our recyclable water bottles, with a lighter environmental footprint, made from postconsumer recycled **or** renewable materials." Goals to source fiber responsibly



### Many companies tie goals to **Deforestation-free** commitments



"PepsiCo is committed to doing business the right way and to realizing zero deforestation in our company- owned and -operated activities and global supply chains from direct supplier to source by 2020."



"Kellogg is...supporting the Consumer Goods Forum (CGF) pledge to achieve zero net deforestation by 2020."

# Most goals commit to source from Recycled fiber **or** Well-Managed Forests



"By 2020, we seek to use only recycled or certified virgin fiber."

#### **MARS**

"100 percent of pulp and paper-based packaging from certified, verified or recycled sources by the end of 2020."









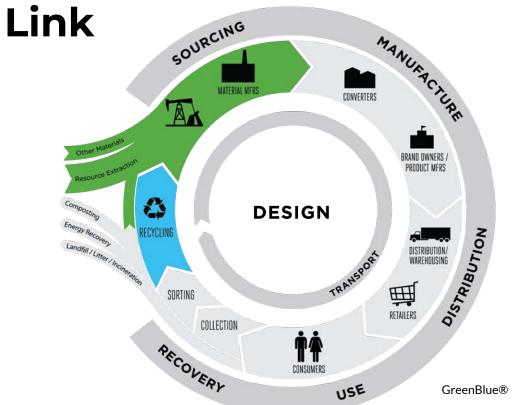




Goals to use Recycled Materials



Recycled Content is the



## Many companies specify recycled content across all packaging





"Colgate's 2020 goal is to increase recycled content in our packaging to 50 percent."

"[By 2025] 100% of our products will be in packaging that is returnable or made from majority recycled content."

## Some companies also use substrate-specific goals

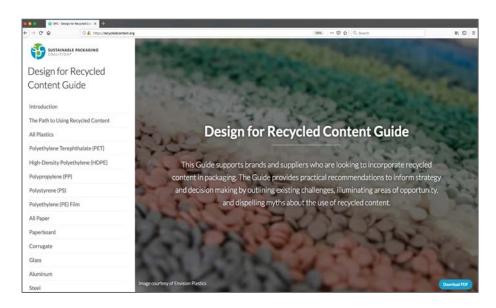


"Achieve 40% average recycled content in our plastic bottles [by 2025] - and 100% by 2030."



"By 2025 we will increase the recycled plastic material content in our packaging to (at least) 25%."

# Understanding & overcoming challenges to using recycled content



recycledcontent.org

## Tracking & verifying recycled content







Chemical Recycling can create quality recycled content for use in a wide variety of materials



Goals to eliminate toxic materials

### Most material health goals relate to **PVC and BPA**

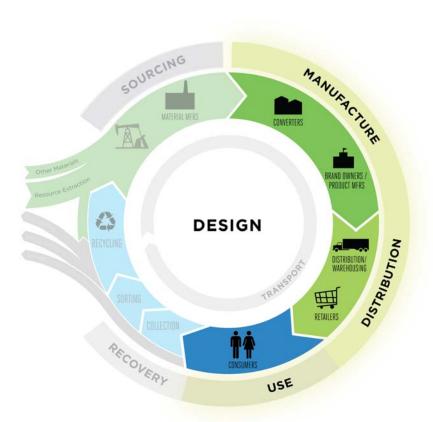


Campbells

"We want to remove and avoid PVC and other substances of potential concern."

"Campbell is committed to removing Bisphenol A (BPA) from our metal packaging material."





## Design optimization

- Material efficiency
- Eliminating problematic, unnecessary materials

Goals on Material Efficiency



## These goals mostly relate to material reduction



"Reduce total packaging weight by 15% by 2020."



"65 million kg of packaging material worldwide will be eliminated by 2020."

## Lightweighting existing packaging

Moving to flexible formats

Goals to eliminate problematic or unnecessary materials



## "Problematic or Unnecessary Single-Use Plastics"

















- 1) Avoidable or reusable options available
- 1) Not recyclable or hampers recycling
- 1) Pollutes our environment

### Many company goals focus on polystyrene, polyvinyl chloride (PVC) and straws



"For **polystyrene** (**PS**) packaging, we will follow a dual strategy: significantly reduce our dependence on this material while collaborating to develop the first recycling streams.

We will phase out all **PVC** packaging by 2021, since it interferes with the recycling process for PET."



"Eliminate plastic straws globally by 2020"

### Some goals focus generally on reduction of "unnecessary" plastics



"Removing all single-use plastic products from the IKEA range globally and from customer and co-worker restaurants in stores\* by 2020."



"Continue to remove excess plastics wherever possible."

#### Most NPE signatories are screening their portfolios for "unnecessary" plastics

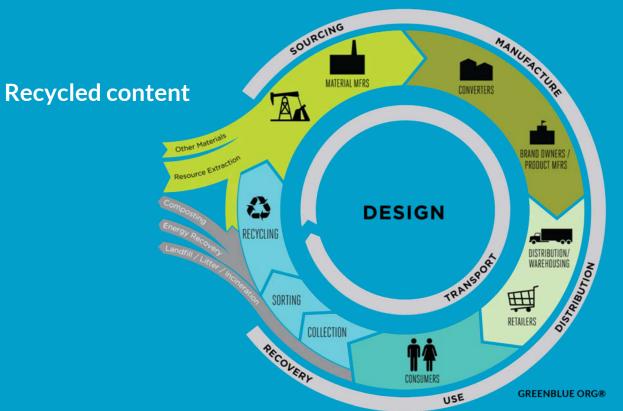
#### INDITEX

"We will screen our entire plastic packaging portfolio in 2019 and publish our roadmap towards the elimination of unnecessary plastic packaging.

We will eliminate the 100% of all singleuse plastic outer bags that protect cardboard boxes from our online orders by 2020."

#### **Eliminate problematic materials**

**Biobased/Renewable** 



**Material efficiency** 



### Pioneering Responsible Sourcing in Packaging Materials, a panel conversation









Arno Melchior

**Global Packaging** 







Laura Thompson Project Lead, (RMS)

Anna Turrell Head of Sustainability

Vetere Global Public Affairs Manager

RB

Director

Chris Daly VP Supply Chain Strategy

Director of Sustainability

Dr. Liz Wilks

Director of Sustainability and Marketing Communications

Lubna Fdwards

Moderator

Sustainable Packaging Coalition

Nestle UK & Ireland

**NatureWorks** 

Mariagiovanna

PepsiCo Europe Sub-Saharan Africa APP

**Klockner Pentaplast** 



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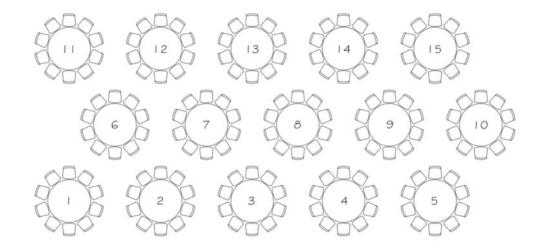








## Knowledge Cafe: Responsible Sourcing & Optimization



- Trade-offs, Managing lifecycle tradeoffs between different material choices: Debbie Hitchen, Anthesis
- Bioplastics, Strategies and applications: Mariagiovanna Vetere, NatureWorks
- 3. Bioplastics, Strategies and applications: Laura Thompson, SPC
- 4. Fiber Responsible sourcing strategies: Liz Wilks, APP
- 5. Renewable and Biobased Materials, possibilities and applications: **Tiina Pursula, Stora Enso**
- 6. Recycled content, Strategies and applications: Chris Daly, PepsiCo
- 7. Recycled content, Strategies and applications: Arno Melchior, RB
- 8. Recycled content, Strategies and applications: Lubna Edwards, Klockner Pentaplast

#### **SCREEN**

- Chemical recycling, Achieving food-grade recycled plastics: Kate Geraghty, Dow
- 10. Chemical recycling, Achieving food-grade recycled plastics: **Carlos Ludlow-Palafox. Enval**
- 11. Problematic single use items, Innovations for non recyclable/often littered packaging: **Nina Goodrich**, **SPC**
- 12. Problematic single use items, Innovations for non recyclable/often littered packaging: **Karen Graley**, **Waitrose**
- 13. Material efficiency, Innovations for using less material: **Kelly Cramer, SPC**
- 14. Material efficiency, Innovations for using less material: **Simon Thompson, Mondelez**
- 15. Material Health, Eliminating toxics in packaging: Liza Blackwell, Lego

#### **Knowledge Cafe: Report Back**





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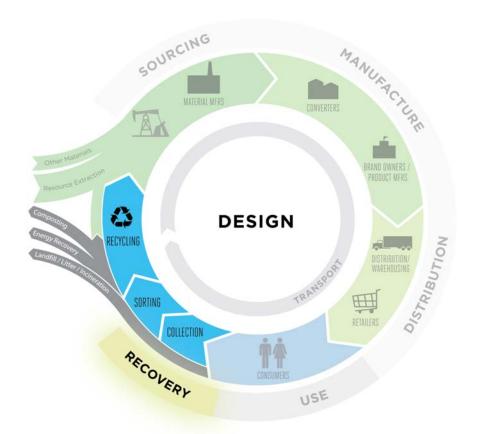




## Designing Packaging to be Reusable / Recyclable / Compostable



Tristanne Davis
Senior Manager
SPC, GreenBlue





- Design for recovery
- Improving recovery infrastructure
- Increase participation in recycling











**End Markets** 

Reprocessing

Sortation

Collection

Consumer Engagement

















**End Markets** 

Reprocessing

Sortation

Recycling disruptors

Process inefficiencies

Low yield/quality bales

- Collection
- systems

- Need more high quality materials
- Low cost of virgin materials
- Limited, fragile markets

- Lack of harmonized
- Consumer Engagement
  - Low consumer participation
  - Wish cycling
  - Contamination











**End Markets** 

Increase market

Improve quality of PCR through R&D

demand for PCR

Reprocessing

Improve infrastructure

Sortation

- Design for recovery

#### Collection

Invest in consistent, collection infrastructure

#### Consumer Engagement

- Provide clear information to consumers on labels
- **Education campaigns**

## Goals on Designing for Recovery



#### Base Material/Format + Other Design Decisions









ONECOFFEE Coffee Sumatran Blend

#### Many goals focus on Recyclability



"100 percent of our packaging be recyclable by design by 2030."

Johnson Johnson

"2020 Goals: Increase the recyclability of our Consumer product packaging to 90+ percent (on a weight basis) via design and partnerships in five key markets where mature recycling infrastructure exists (U.S., UK, France, Germany, Canada)."

#### Many goals give multiple recovery options

#### StanleyBlack&Decker

"Stanley Black & Decker has committed to make all of our plastic and non-plastic packaging reusable, recyclable or compostable by 2025."



"[By 2030] 100% of our packaging will be recyclable or reusable."

## Some information on specific composting goals in the NPE June report



"We commit to expanding production of Ziploc® compostable food scrap bags."



"Researching compostable materials and feasibility and suitability with our products where appropriate."

## Some information on **specific re-use goals** in the NPE June report



"Where relevant: Designing H&M's packaging for reuse and refill and/or purchasing reusable packaging."



"We commit to providing refills for 50% of our trigger bottles by 2025. Specifically this means doubling the number of our trigger bottles that have a corresponding refill either in concentrate form or in oneto-one refill bottles."

#### Design for **Recycling** resources













#### Design for **Composting** resources















### Design for **Reuse** resources





Goals to Improve Recovery Infrastructure



# Most goals are on recycling infrastructure



"The company will support industry coalitions and public-private partnerships to develop vital waste-management infrastructure to reduce waste and improve real-world recycling rates."



"We're investing \$5 million over five years in the Closed Loop Fund to support the expansion of recycling infrastructure and sustainable manufacturing technologies that advance the circular economy."

# Some goals specified supporting developing regions



"We will step up our investment in private initiatives that strengthen collection and a circular infrastructure, especially in countries where formal systems are absent or in development, or where there is a high risk of leakage into the environment or the oceans."

### Johnson Johnson

"2020 Goals: In three other markets [besides U.S., UK, France, Germany, Canada] where recycling infrastructure is less mature engage in partnerships to advocate material recovery and recycling efforts."

# Partnerships to develop infrastructure









### Deploying specialized infrastructure







# Investing in **chemical recycling** infrastructure









Goals to Increase Participation in Recycling



### Many companies make goals related to consumer labels



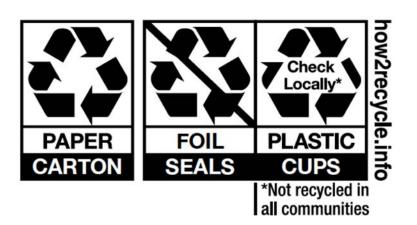
"By 2025, 100 percent of our plastic packaging will also be recyclable or reusable, with best-in-class labeling to help consumers recycle effectively."



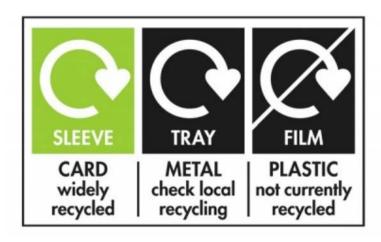
"Unilever North America will add clear recycling instructions to packaging for its entire mass-market portfolio by the end of 2021. Unilever has been working with How2Recycle to add clear recycling labels and will now standardize its use on all packaging in North America."

# Clearly **labeling products** can communicate recyclability to consumers

#### How2Recycle



#### **OPRL**



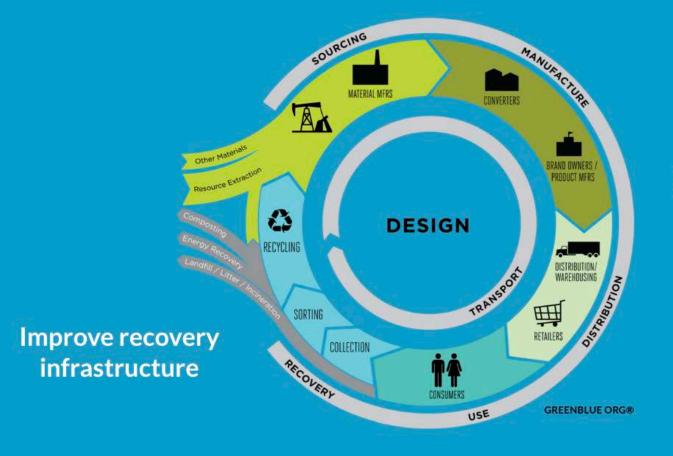
# Some companies make goals related to partnerships & consumer education



"We pledge to ... engage millions of customers in the thousands of communities we call home to adopt recycling behaviors as the norm."



"In Indonesia, Danone AQUA is committed to leading a nationwide educational campaign on recycling, with dedicated programs in 20 major cities by 2020."



**Design for Recovery** 

Increase participation in recycling



### Designing Packaging Holistically to Fulfill Recovery Goals, A Panel Conversation



Kelly Cramer Director Program Management

Moderator

Sustainable Packaging Coalition



Gian de Belder Packaging Technologist

P&G



Laura McGonigal European Greenskeeper

**Method Ecover** 



Simon Thompson Associate Principal Engineer

Mondelez UK



Dr. Carlos Ludlow-Palafox CEO

Enval



Liza Blackwell Senior Packaging Sustainability Manager

The LEGO Group



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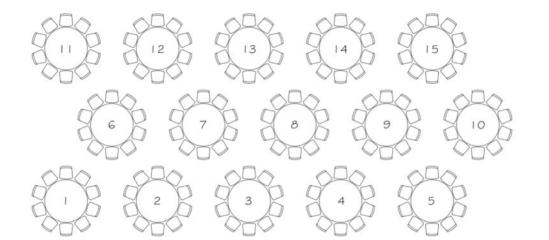




#### **Knowledge Cafe: Report Back**



#### Knowledge Cafe: Effective Recovery



- Trade-offs, When to use Recyclable vs. Compostable vs. Reusable: Sabrina Stiegler, Beiersdorf
- 2. Design for Recycling, Strategies for success: Anna Turrell, Nestle
- 3. Design for Recycling, Strategies for success: Roger Baynham, British Plastics Federation
- 4. Design for Recycling, Strategies for success: Kelly Cramer, SPC
- Recycling Collection, Improving collection and reducing contamination: Nina Goodrich, SPC
- 6. Recycling Infrastructure, Improving recycling sortation & reprocessing: **Gian** de Belder, P&G
- 7. Recycling Infrastructure, Improving collection and infrastructure in other regions: Julia Koskella, SYSTEMIQ
- 8. Recycling End Markets, Improving demand for recycled materials: Laura Thompson, SPC

#### **SCREEN**

- 9. Recycling End Markets, Improving demand for recycled materials: Arno Melchior, RB
- 10. Consumer Engagement, Increasing participation in recycling through labeling and education: **Ursula Denison, Greendot**
- 11. Consumer Engagement, Increasing participation in recycling through labeling and education: Jane Bevis, OPRL
- 12. Composting, Design strategies and boosting infrastructure: **Tristanne Davis, SPC**
- 13. Composting, Design strategies and boosting infrastructure: Marco Versari, Novamont
- 14. Reuse, Scaling reuse models: Juliet Lennon, EMF
- 15. Reuse, Scaling reuse models: Laura McGonigal, Method Ecover



#### **Event Wrap up Activity and Conclusions**

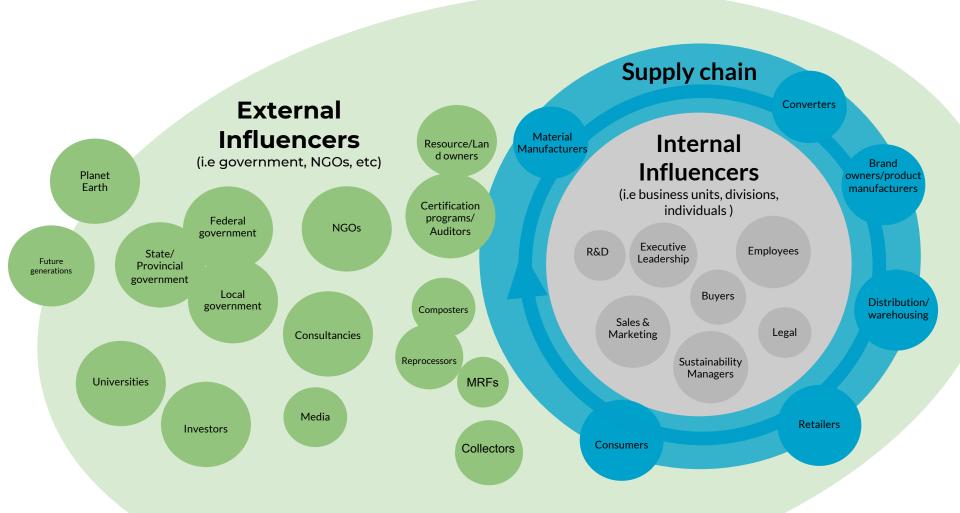


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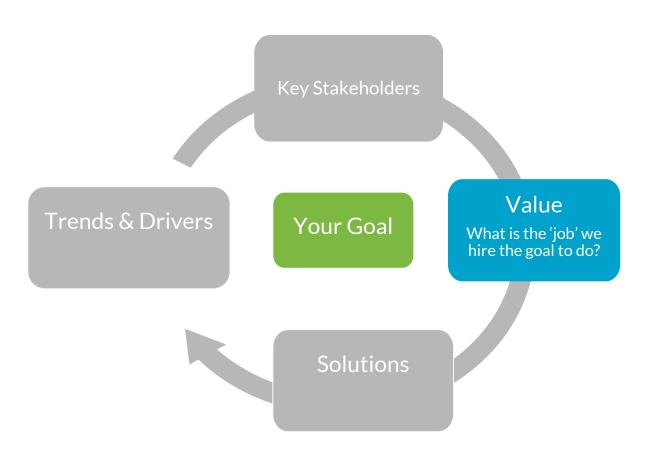




# Activity: Identify the most important customer

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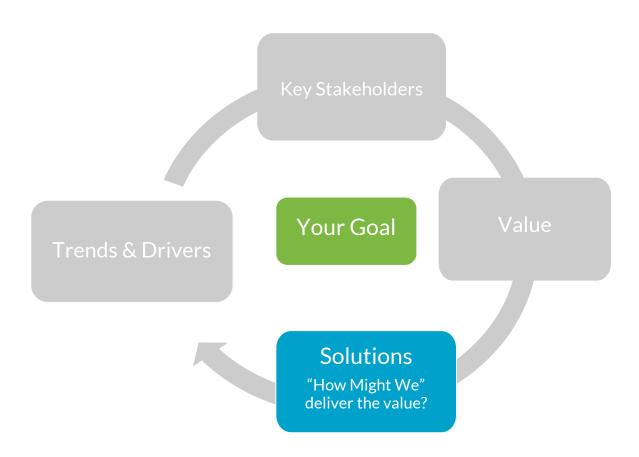


### **Activity:**

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E.g. Brand owners (executive leadership)	Build trust between customers & the company Provide risk assurance against deforestation	Positive consumer social media posts; growth in new business Number of publicity issues

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### **Activity:**

Brainstorm "How might we deliver our goals in a way that maximizes value to our most important customer?"





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23 - 24, October | LONDON

# Thank you!