

# PETCORE EUROPE



[www.petcore-europe.org](http://www.petcore-europe.org)



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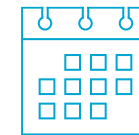
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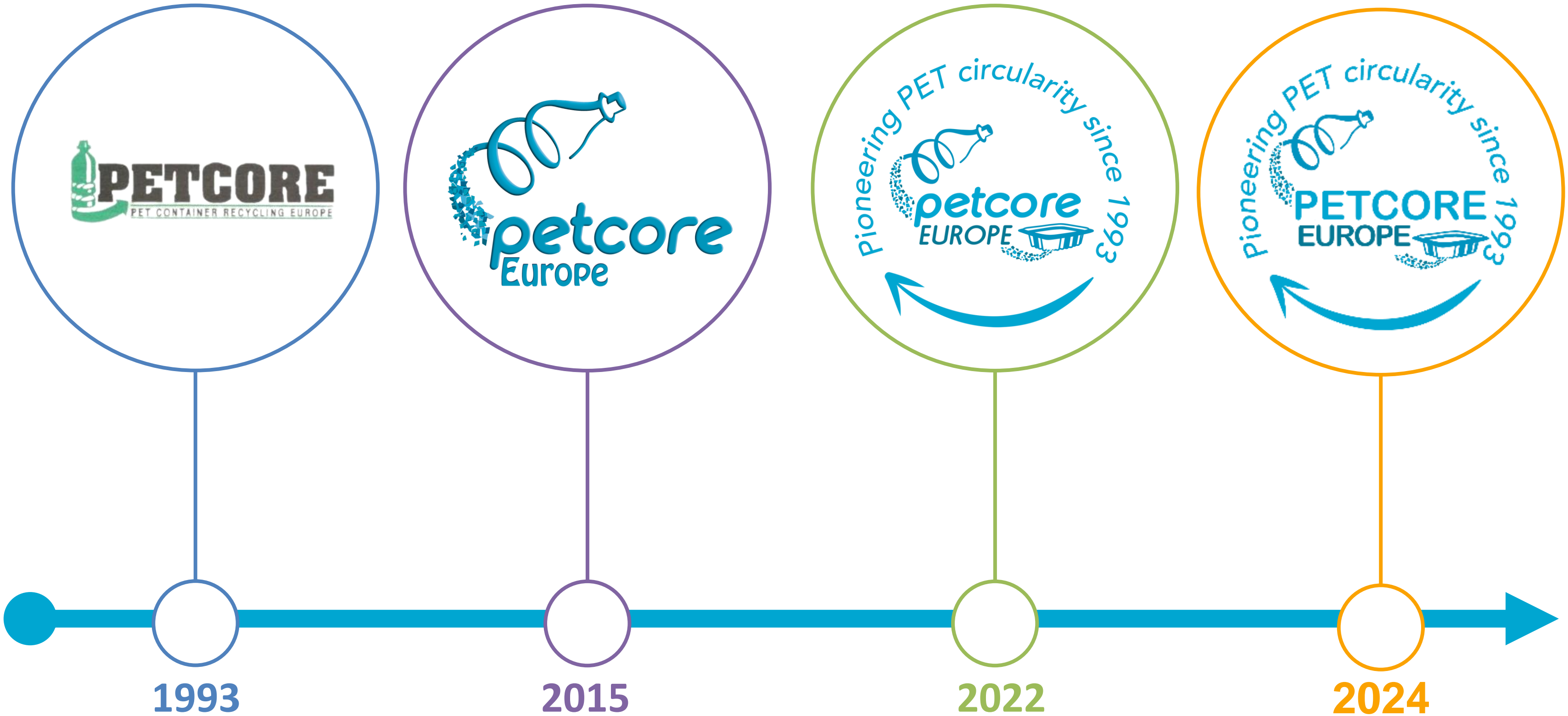
# INTRODUCTION

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# HISTORY OF OUR PRESENCE SINCE 1993



# PETCORE EUROPE VISION

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**PETCORE EUROPE** is a Brussels-based, non-profit organization, representing the entire PET value chain since 1993.

Its membership consists of more than 160 companies, 9 associations, including PET producers, recyclers, converters, brand owners, technology suppliers, labels, masterbatch, waste management companies and retailers.

**Our vision is to achieve widespread recognition of the performance of PET as THE circular material of choice for packaging and to make sure PET is collected and recycled.**

# PETCORE EUROPE MISSION

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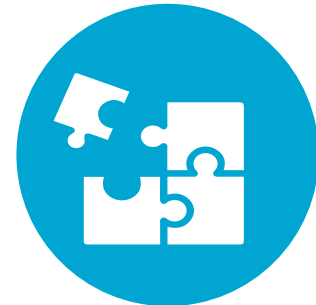
Represent the PET value chain within the global institutions (EU, UN) and all other stakeholders.



Ensure that PET is positioned as an outstanding packaging material and recognized as environmentally sound and circular



Support and validate innovative solutions to improve circularity.



Work with all interested parties to ensure a continuous increase of PET post-consumer collection/sorting/recycling.



Ensure that the entire PET industry is well aligned to enhance sustainable growth



More than 160 members



More than 600 companies



More than 500 sites across EU



More than 27k employees



Approx. 5 million tones utilized



More than 15 billion euros turnover 2022

# PETCORE EUROPE IN FIGURES

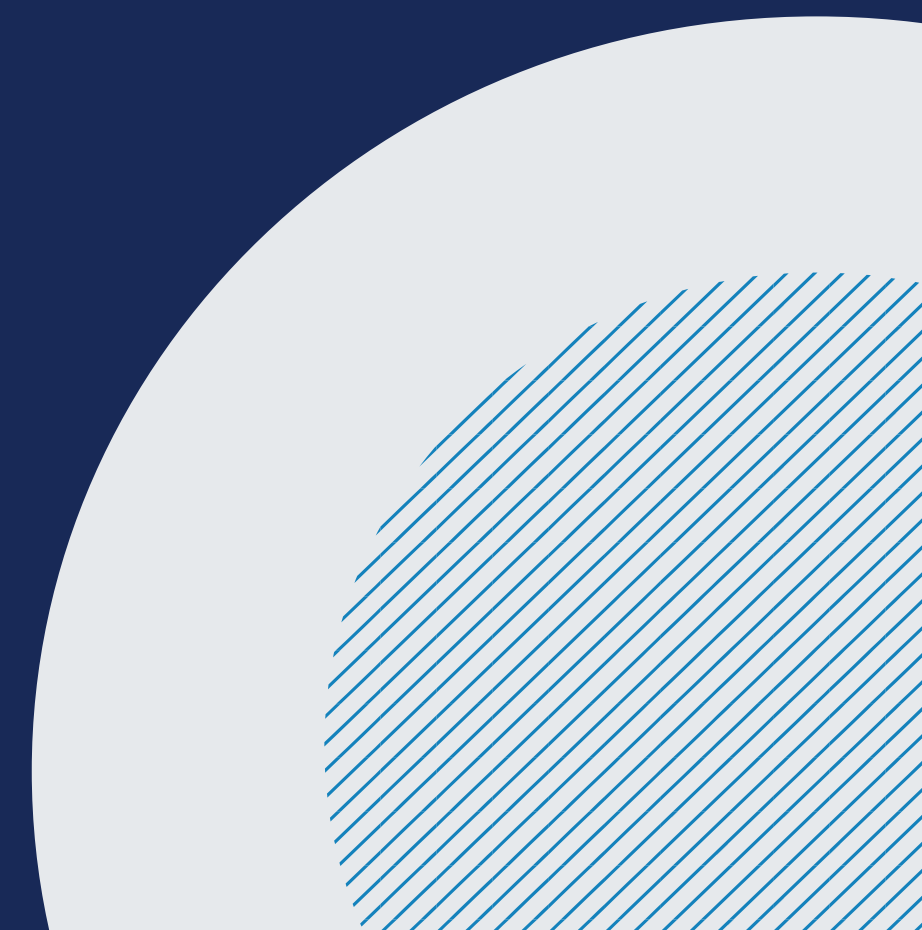
**Approx. 3 million tons of post-consumer PET packaging was collected in 2022 according to ICIS.**

**75% of bottles placed on the EU market have been collected.**



# MEMBERSHIP

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# PETCORE EUROPE MEMBERSHIP- Associations



100% of European PET manufacturers – 3.5 million tones installed capacity in EU - 3 bn € turnover



46 National and European associations - 50'000 companies – 500 million tones - 260 bn €



The PET bottle associations in France (Elipso) and Germany (IK)



500 companies – more than 12 million tones installed capacity - 10 bn € turnover



European association for the self-adhesive label industry



Italian plastics and rubber processing machinery and molds manufacturers' Association



Registered charity and not-for-profit organization to promote, develop, stimulate and increase the levels of plastics recycling within the UK

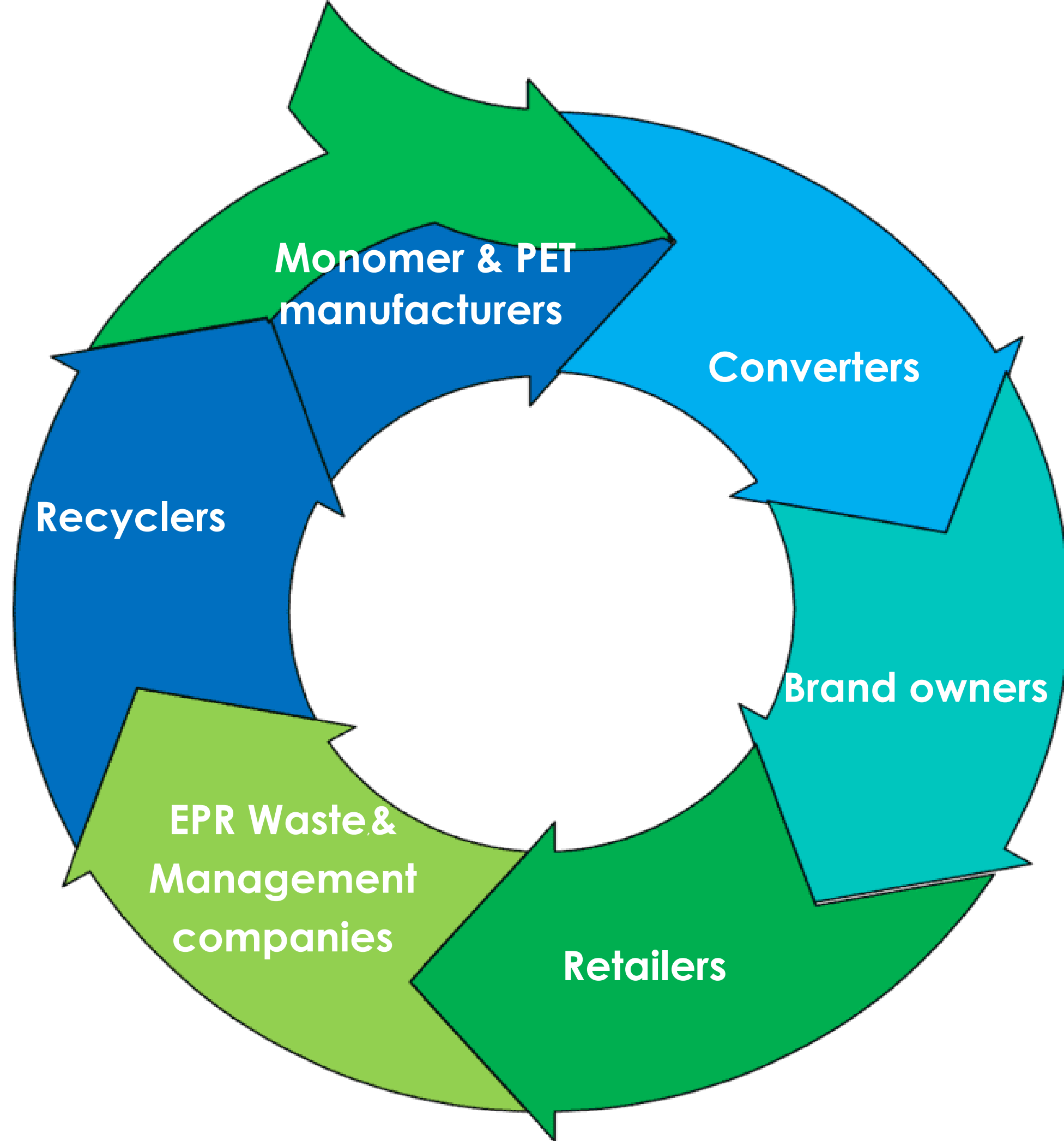


The association representing BOPET film producers in the European market



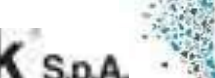
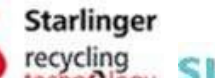
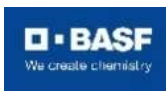
Brussels based association representing global & national soft drinks associations





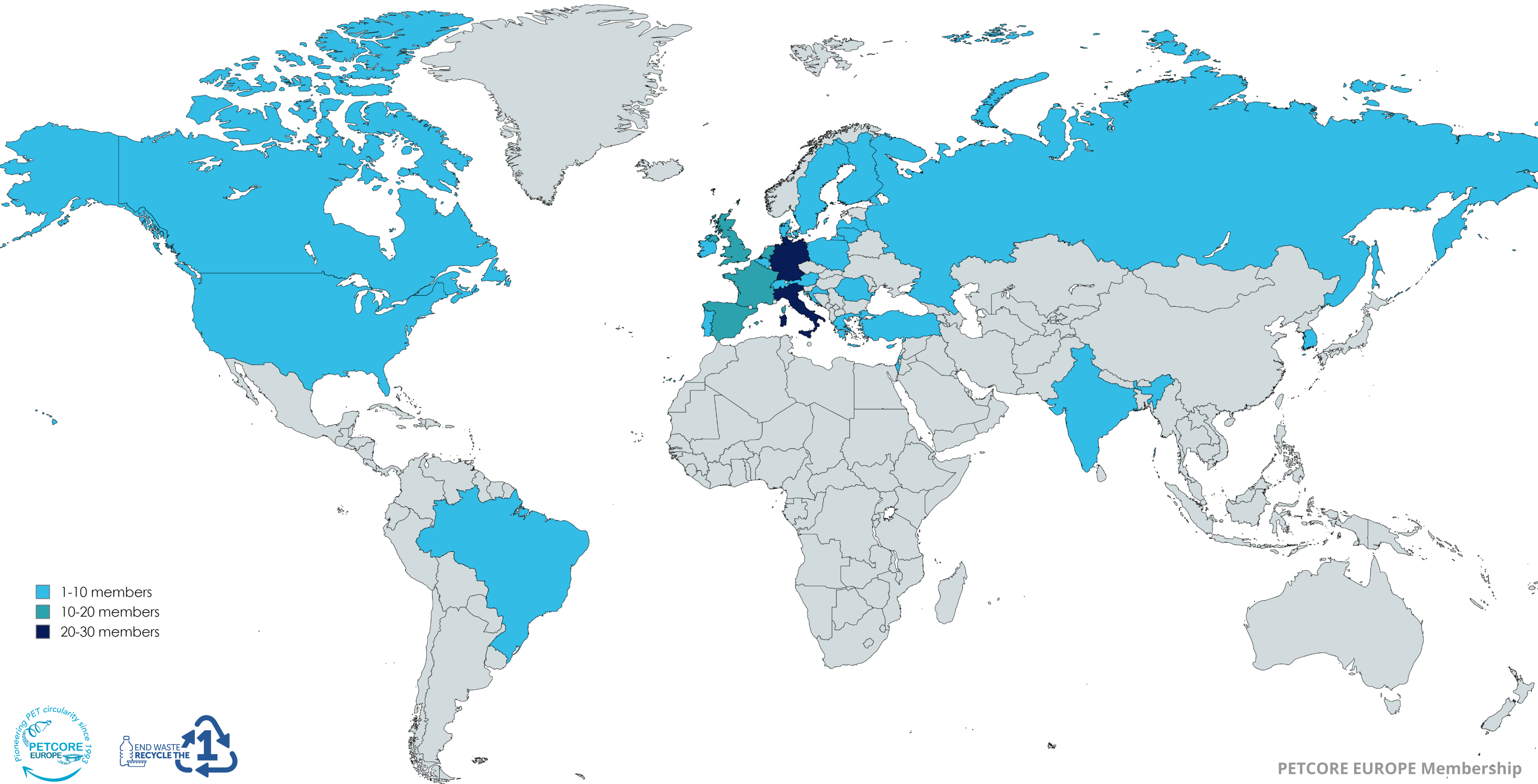


# PETCORE EUROPE: the whole EU PET Value Chain





# PETCORE EUROPE MEMBERSHIP - PRESENCE



1-10 members  
10-20 members  
20-30 members





# PETCORE EUROPE'S PARTICIPATION FEES

Company Member Turnover	Membership Annual Fee
Less than 20 m EURO	€ 4,000
20 up to 100 m EURO	€ 5,000
Above 100m up to 500 m EURO	€ 6,000
Above 500 m EURO	€ 7,500
*m: m stands for million	

The participation fee is linked to the annual turnover of the candidate as per the above table.

Participation in some working groups may be subject to complementary fees.



# UNITED NATIONS ENVIRONMENT PROGRAM (UNEP)

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**UNEP's mission is to inspire, inform, and enable nations and peoples to improve their quality of life without compromising that of future generations.**



In 2023 **PETCORE EUROPE** has been granted an accreditation as **Observer** to the United Nations Environment Assembly and its subsidiary organs.

This accreditation allows PETCORE EUROPE to receive invitations to all public meetings and sessions of the **United Nations Environment Assembly** and actively participate in negotiations or stakeholders' sessions (e.g. UN Global Plastics Treaty).

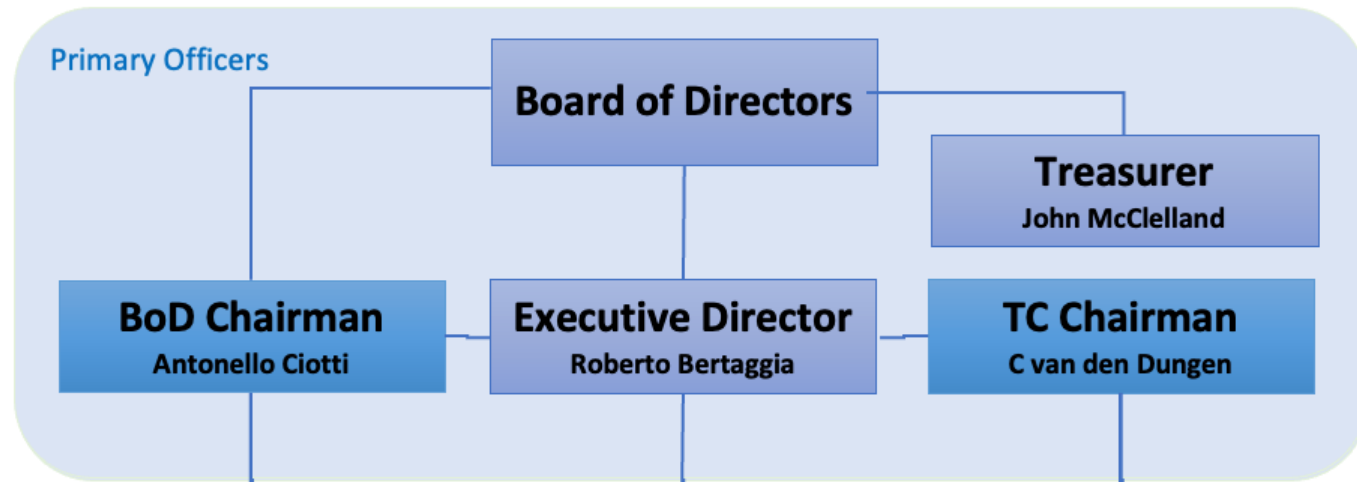


# ORGANISATION



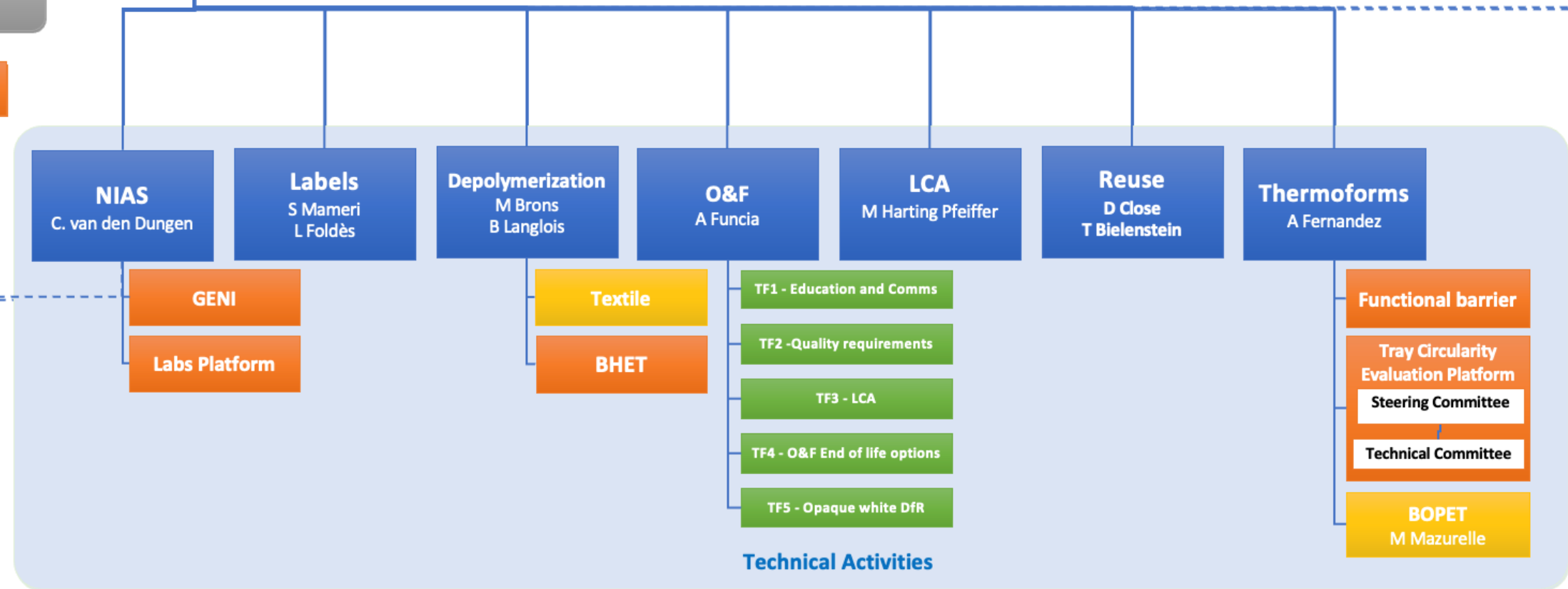
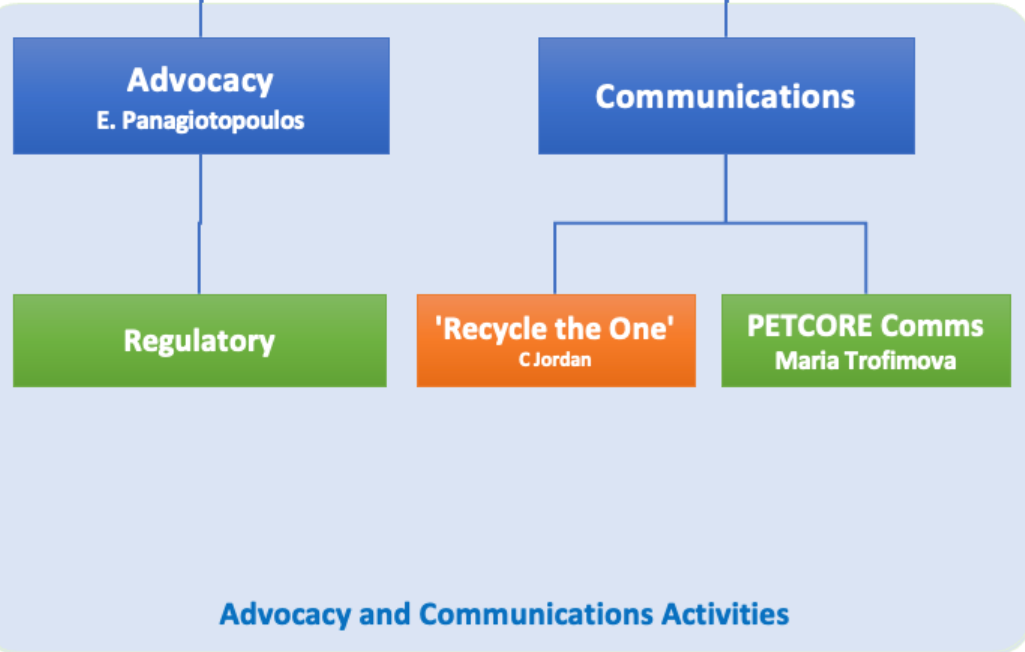


# PETCORE EUROPE ORGANISATION



Technical Managers : A Dabanlis, JA Alarcon and R Jaumotte

**Standardization**



**PING**  
Closed group



# PET COLLECTION & RECYCLING IN EU

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# PET RECYCLING STATUS 2022

## ICIS Report 2024

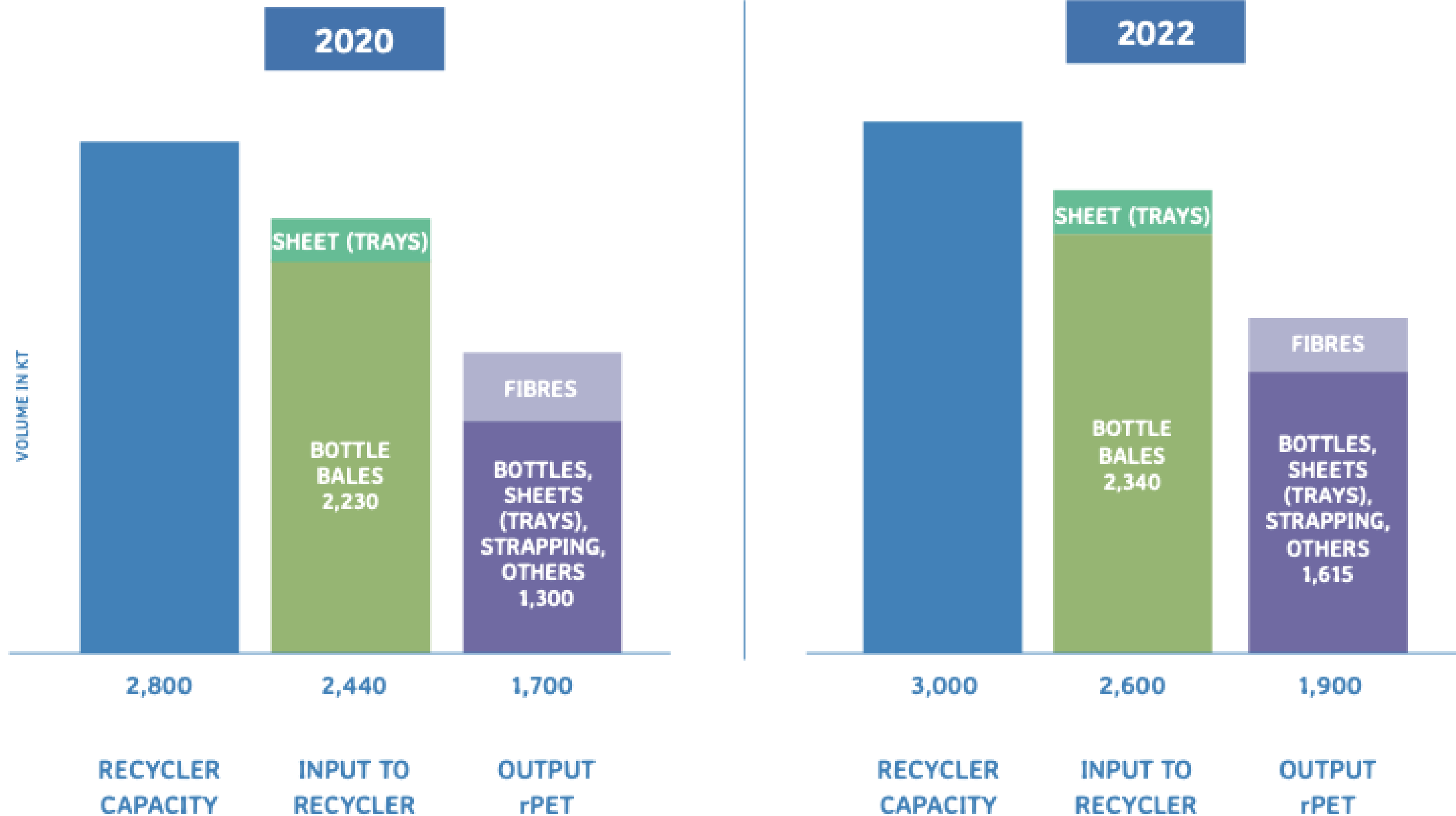
The European PET Packaging industry is striving to increase collection, recycling and recycled content to meet regulatory targets and beyond. The PET Market In Europe State of play report summarizes these efforts:

- 75 % collection rate for PET bottles
- Development of Collection and recycling for thermoforms
- Development to chemical recycling
- and much more...

The report has been developed In collaboration with PRE, UNESDA and NMWE. Have a look at it to have in-depth insights



# PET RECYCLING EVOLUTION



Source: ICIS Supply Demand Database, ICIS analysis, PRE survey data, Eurostat





# PETCORE EUROPE Working Groups & Task Forces

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# PETCORE EUROPE Working Groups

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- ✓ PETCORE EUROPE' WGs are the enablers that support to deliver its mission.
- ✓ The key to our success is the voluntary work of PET value chain experts in the working groups and platforms.
- ✓ Representatives of PETCORE EUROPE members can participate in the WG's.
- ✓ The WG's work under the lead of one industry expert who acts as the WG Chairperson and coordination of PETCORE EUROPE Technical managers.
- ✓ PETCORE EUROPE assures that the needed subject expertise is represented in the WGs.

## Mission and deliverables

- Established in 2023, aiming to define a PETCORE EUROPE position on the regulatory & legislative developments shared among all members.
- To define a list of topics on which PETCORE EUROPE needs to take a position and elaborate the PETCORE EUROPE response by:
  1. Staying connected with the Technical WG's to identify/validate the key topics and ask them to develop the related argumentations.
  2. Setting up individual meetings with the above-mentioned stakeholders, to better understand the proposed regulatory developments and provide the position of the PET value chain.




## Mission and deliverables

- To update PETCORE EUROPE Members on incoming legislation impacting the PET Business (webinars twice a year).
- To identify key stakeholders in the area of regulatory & legislative propositions, and establish ongoing communications with them.
- To identify activities/forums where regulatory stakeholders present their latest developments and where PETCORE EUROPE can present PET value chain presentation.



# Recyclability Evaluation Platforms (EPBP and TCEP)

Drive and promote the circularity in the PET bottle and trays value chain, providing the industry design guidelines and package/technology assessments.

<p><b>YES</b> Full compatibility – materials that passed the testing protocols with no negative impact</p>	<p><b>CONDITIONAL</b> Limited compatibility – materials that passed the testing protocols if certain conditions are met</p>	<p><b>NO</b> Low compatibility – materials that failed the testing protocols</p>
		



# Recyclability Evaluation Platforms (EPBP and TCEP)



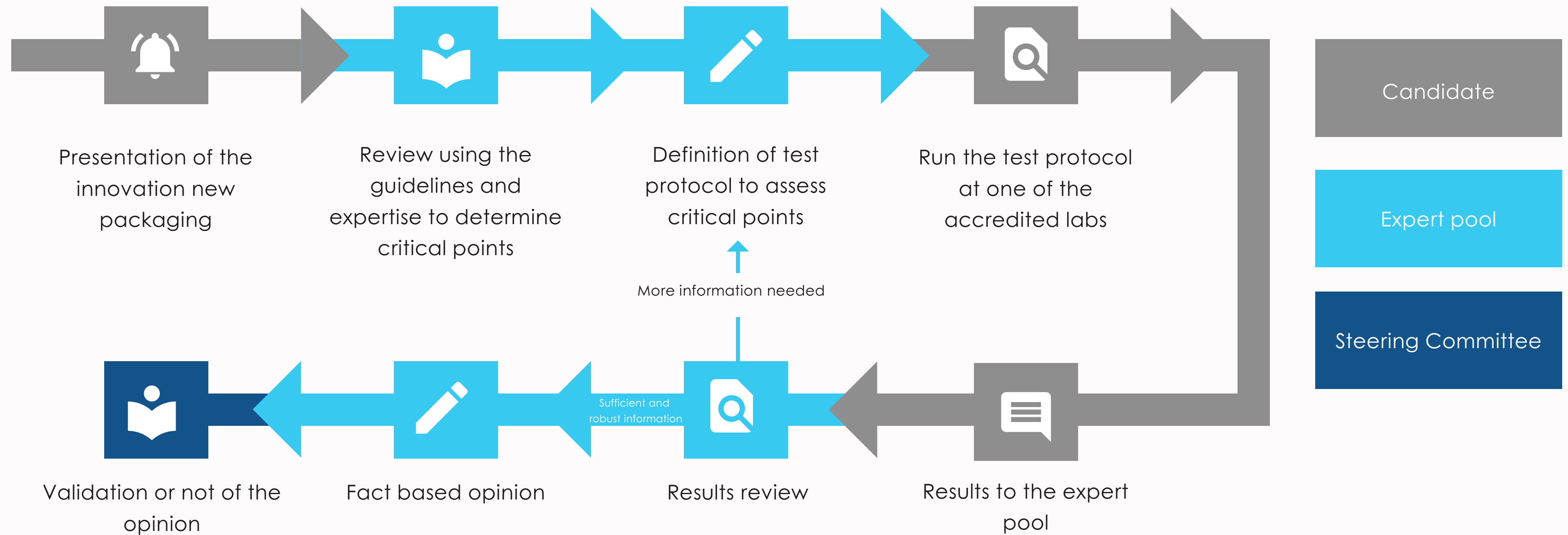
- EPBP and TCEP strongly encourage all companies to bring their new PET bottle – tray solutions to the platforms in order to get an objective third party assessment of their recyclability.



- The platforms rely on strong processes and protocols for the assessments. As a result, these assessments are scientifically relevant, trustful and independent from a single sector's views. The assessment bodies cover the full value chain experience and expertise.



# Recyclability Evaluation Platforms Evaluation process



# FUNCTIONAL BARRIER CONSORTIUM

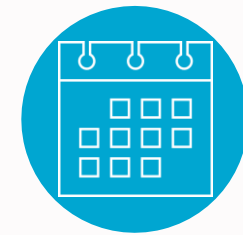
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- Established in 2022 to act as technology developer under EU 2022/1616.
- 60 companies are part of the Consortium sponsored by PETCORE and EuPC.



## Deliverables

- Provide Technical documentation and dossiers to comply with EU 2022/1616 regulation.
- Deploy monitoring program and sampling plan.
- Maintain continuous dialogue with members and authorities.

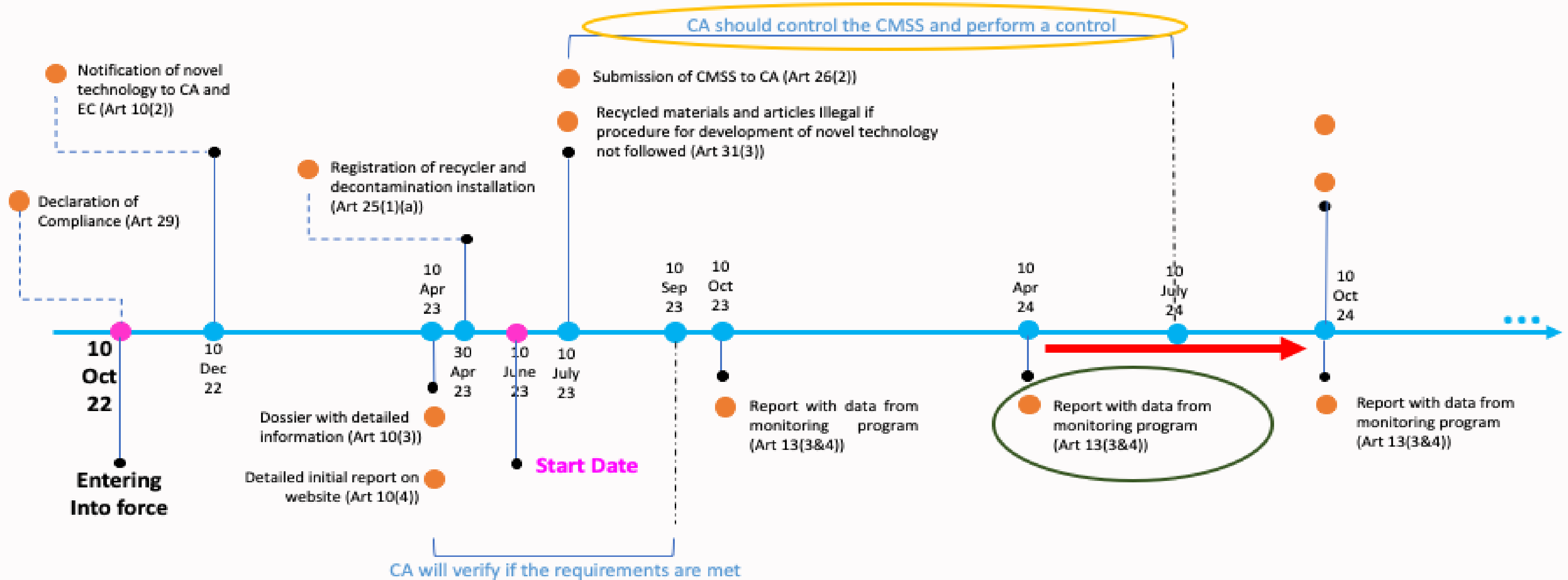


## Upcoming activities

- Main dossier presented in April 2023
- Monitoring Protocols and procedures implemented.
- Laboratory platform implemented with KÖR to support sampling plan and monitoring program (see specific slide on LABS)
- Monitoring Reports delivered in October 2023 and in April 2024.



# FUNTIONAL BARRIER CONSORTIUM



● Novel technologies already on the market prior to entering into force

CMSS = Compliance Monitoring Summary Sheet  
CA = Competent Authority





# RECYCLING PET THERMOFORMS

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- Established in 2015.
- 74 companies and organisations from the whole PET value chain.
- Working to make PET thermoforms circular.

## Deliverables

- Improve design for recycling.
- Improve collection and sorting across the EU.
- Provide support on incoming legislations.

## Upcoming activities

- 24<sup>th</sup> of April 2024 – Steering Committee Meeting. Task force: rebuild and realignment.
- Thermoforming Event in Granada on the 25th and 26th of June.



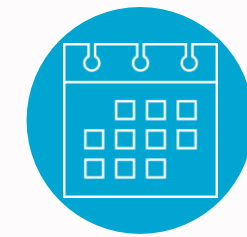
# OPAQUE & FUNCTIONAL BOTTLES

- Established in May 2016 with more than 75 participating companies.
- PET bottles in scope: non-clear (opaques), colored, sleeved and functional PET bottles.



## Deliverables

- Establish and update of DfR guidelines for Opaque white PET.
- End of life proposal for all colored and opaque PET bottles.
- Special focus on sortability (a dedicated webinar has been held on the topic in March 2024.)
- Database of white opaque PET recyclers and outlet to facilitate the development of a stream of recycled opaque white PET.



## Most recent achievements & upcoming activities

- Definition of specification for an opaque white rPET as non-mandatory guidance to industry.
- Listing of companies able to produce and companies able to use opaque white rPET.
- Design for recycling for opaque white PET bottles for EPBP and CEN Standardization work.



# LABELS

Created 2021 - 30 companies and 1 association.



## Deliverables

- Recommendations and best practices to brand owners, green dot associations, sorting centers and recyclers.
- Pressure sensitive labels design for recycling.
- Crystallizable PET labels: understanding impact.
- Interactions on Circularity and food safety.



## Most recent achievements & upcoming activities

- Focus on food contact impacts of labels (shared activity with FINAT.)
- Revise preferred behavior of adhesives in conjunction with EPBP.
- Assess and promote the deployment of the design for recycling within the industry.



# PET INDUSTRY NIAS GROUP (PING)



## Deliverables

- PING focuses on compliance with EC Regulation N°10/2011.
- Targets the creation of an industry standard to
  - Measure,
  - Risk assess,
  - ControlNIAS throughout the value chain.



## Most recent achievements & upcoming activities

- Measurement guidelines for NIAS in PET.
- Development of a digital platform to support (see specific slide on LABS)
  - Production of quality data.
  - Ease data aggregation and statistical analysis.
  - Data trending through the value chain.





# PET DEPOLYMERISATION

- Started in 2019 -15 members.

## Deliverables

- Support development of recycling possibilities for non-circular waste:
  - Colored and multimaterial packaging.
  - Wastes from mechanical recycling units.
  - Polyester textiles.
- Support regulatory framework development for depolymerisation.

## Most recent achievements & upcoming activities

- Revised PET depolymerization position paper 2023.
- End of Waste white paper.
- Support novel technology filing as per EU 2022/1616 regulation and EC 10/2011.





# REUSE

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- Started 2021.
- Align the industry's strategy regarding REUSE targets.
- Following up on PPWR developments.
- Sharing best practices across EU where both single use and reuse are in place.

# LCA

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- Started 2021.
- Focus on delivering relevant data regarding PET environmental impact.
- Evaluating 'green' claims made by competitive materials such as glass and metals.
- Developing a platform, that all members can use for developing their 'circularity position' and align communication.
- Being in contact with NAPCOR for leveraging on their advanced experience for LCA studies.

**The two WGS are highly interlinked with the LCA platform providing the ground for better evaluations**

# TEXTILES SIG

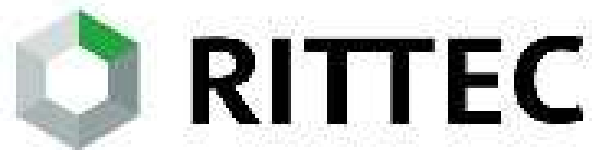
- Rebounding on the EU Textile strategy.
- Filling the gap due to lack of knowledge from the textile associations about PET Ecodesign requirements for recycling, which will become MANDATORY.
- And after meeting with various stakeholders (EU Commission representatives, EU associations, Sorting machines manufacturers and textiles sorting plants).

**PETCORE EUROPE proposed guidelines will be elaborated by the SIG and presented for discussions by the EU Commission.**



# TEXTILES SIG

## MEMBERS OF THE TEXTILE SIG



# Collaboration PETCORE EUROPE – KÖR LABS Digital Platform

- The PET Value Chain has to permanently assess the quality of the virgin material, recycled material and packaging it produces.
- PETCORE EUROPE and KÖR have decided to partner to develop a digital platform called LABS to facilitate:
  - Connection between Laboratories and value chain players
  - Deployment of industry recognized standard
  - Ordering and results return
  - Results aggregation in one database, results report being standardized
- It facilitates the data aggregation for the monitoring requirements and proficiency tests set by EU 2022/1616 for Novel technologies and PETCORE EUROPE uses the LABS platform to support the Functional Barrier Task Force activities.
- Regular webinars (the last one in March 27<sup>th</sup>) are being held to inform about the LABS platform capabilities and evolutions. Stay tuned!



**SAVE THE DATE**  
Petcore Europe - KÖR 4<sup>th</sup> Webinar  
**NIAS testing via Labs**  
& an outlook to migration tests  
27 March 2024, 2.00-3:30PM CET

Register

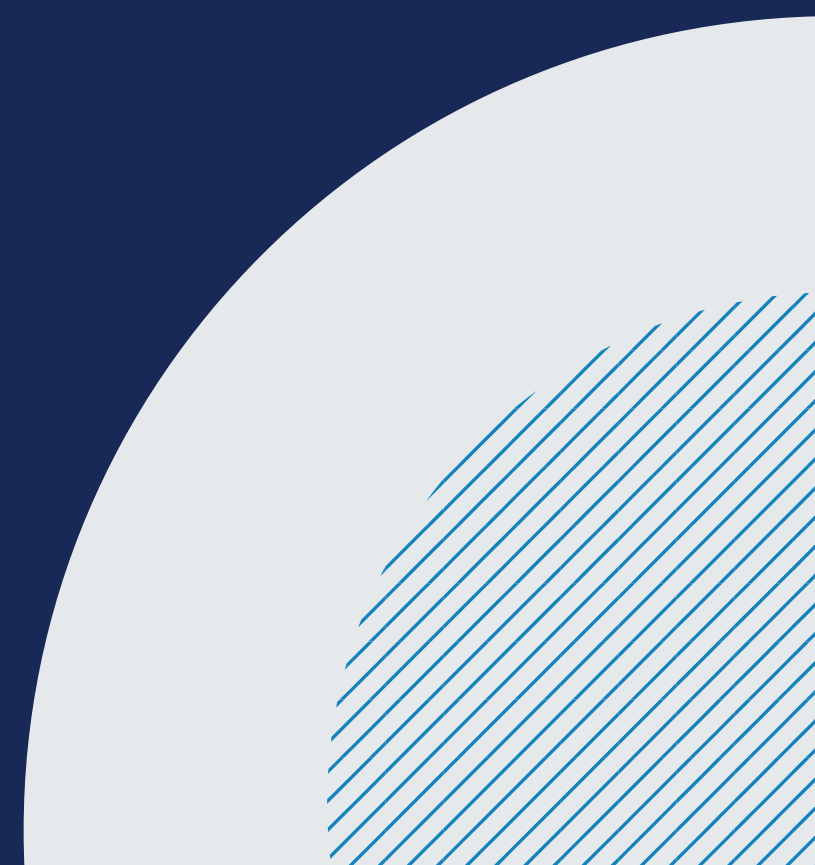
KÖR  Creating Industrial Intelligence

Labs  Powered by KÖR



# REGULATORY AND SCIENTIFIC AFFAIRS

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# Regulatory and Scientific affairs

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## Deliverables

- Monitor regulatory evolutions.
- Collect PETCORE EUROPE members feedback on regulatory matters and issues.
- Provide policy makers with relevant information to help regulation creation and evolution.
- Support our members in the understanding and deployment of the regulation.



## Most recent achievements & upcoming activities

- Contribution to consultations:
  - BPA
  - EC 10/201
  - End of Waste
  - EC 2022/1616
  - PPWR/SUP
- Participation in workshops preparing regulatory evolutions.
- Updates on regulatory evolutions in the Working Groups.

*The following slide shows the 'landscape' of the most relevant regulations for our value chain.*



# Regulatory and Scientific affairs



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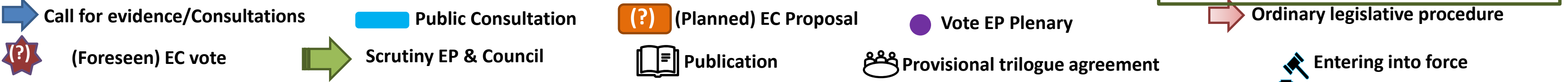
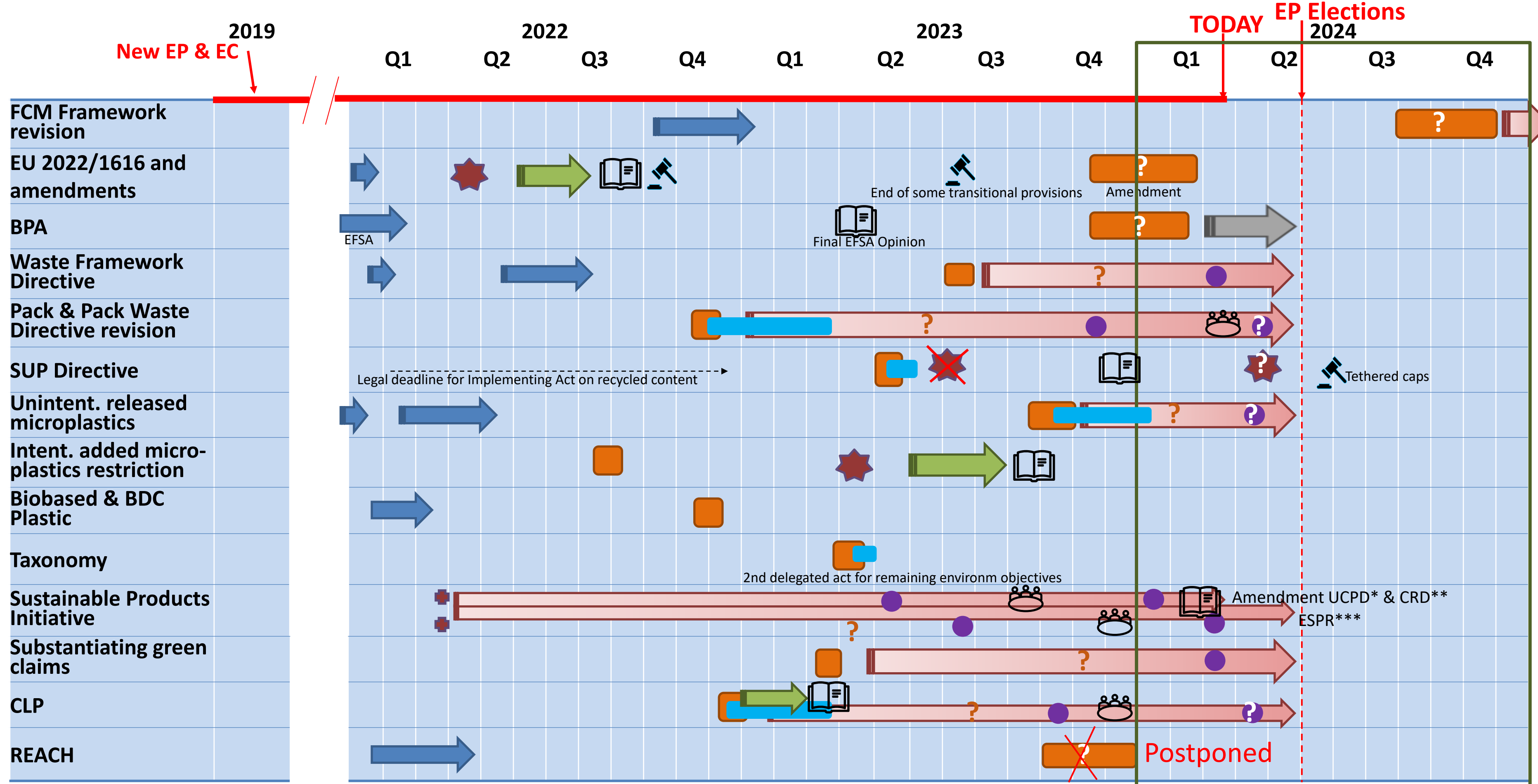


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\*UCPD: Unfair Commercial Practices Directive; \*\*CRD: Consumer Rights Directive; \*\*\*ESPR: Eco-design for Sustainable Products Regulation

# PETCORE EUROPE EVENTS:

## Workshops & Annual

## PETCORE EUROPE

## Conference







# SPONSORSHIP PACKAGE

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PETCORE EUROPE organises several physical events throughout 2024 that are sponsored by organisations or individual companies, and we invite you to contact us, should you wish to join this growing list.

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As sponsor, your company's name and logo will be displayed on all our communications material (including invitations, agendas, press releases and website) as well as promoted during the event. If you are interested to hear more about our sponsor package, please contact us on: [maria.trofimova@petcore-europe.org](mailto:maria.trofimova@petcore-europe.org).



# Thermoforms Conference 2024: Towards Circularity of PET thermoformed packaging

- Thermoforms conference 2024 draws the whole PET value chain in these 2 days physical event to boost thermoforms collection & recycling to promote tray to tray circularity.
- First Day:  
High-level speakers will join us to explain the European Commission's goals & expectations for PET trays.  
Major experts in the field of thermoform will feature presentations on the initiatives towards the circularity of PET thermoformed packaging, followed by panel discussions with guests from leading companies in the industry.
- Second Day:  
Visit to one of the most modern Sorting Centers in Europe (Strictly for PETCORE EUROPE members).  
The participants will have an exclusive networking opportunity in combination with extraordinary historic sightseeing in Granada.

**SAVE the date 25 & 26 June 2024 to meet up with experts and PET Thermoforms industry leaders at our Thermoforms Conference 2024.**

# PET PACKAGING: HOW TO IMPROVE CIRCULARITY VIA THE LATEST SORTING TECHNOLOGIES?

- Objective of this educative, online webinar was to help understanding better what else could be done to improve sorting of PET packaging waste. The main questions of the event were: how to advance circularity via sorting technologies? PET Packaging Sorting: the decisive role to boost PET circularity in Europe/ Sorting: the silver bullet for Circular rPET?
- PET claims to be the "best in class" plastic, but only clear beverage bottles can be considered truly circular. All other PET categories, including non-food bottles, opaque, colored or full-sleeve bottles, trays (mono and multi-layers) still need a lot of progress, and time is ticking. Circularity requires to separate these products into as many sub-streams as needed: this is called granular sorting. Latest optical sorting innovations are the key enablers for granularity, as they go far beyond the recognition of the main material.
- Many participants attended the webinar, including representatives from the European Commission.



A blue and teal banner for a webinar. The top section has a circular logo on the left, the text 'PET Packaging: how to improve circularity via the latest sorting technologies? ONLINE Webinar' in the center, and a 'REGISTER' button with a bottle and recycling icons on the right. The bottom section has a background of blue PET bottles and contains the text 'Petcore Europe IS THE ASSOCIATION REPRESENTING THE COMPLETE PET value chain in Europe', the date '19 MARCH', a 'SAVE' button, and the time '2:00 - 5:30 PM CET'.

# PETCORE EUROPE'S ANNUAL CONFERENCE 2024

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- PETCORE EUROPE Annual Conference 2024 was held in Brussels on 7-8th of February as an in-person event.
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- This event explored the core challenges which the PET value chain has been facing over the past years: market dynamics, improvement of analytical methods, micro-plastics: updates on newly developed analytical methods, recent and future regulatory EU issues and many other insightful topics. We welcomed high-level speakers from the European Institutions:

Klaus Berend - DG SANTE-European Commission

Wolfgang Trunk - DG ENV-European Commission

Laure Baillargeon - DG GROW-European Commission

- The first day featured high-level interventions from the institutions and business community touching on a wide range of issues. While the second day of the event was focused on Technical Interventions from all PETCORE EUROPE Working Groups.



# PETCORE EUROPE'S ANNUAL CONFERENCE 2024

PETCORE EUROPE welcomed more than 30 key-speakers, including the representatives from the European Commission.

## 11 Sponsorships



## 10 Media Partners

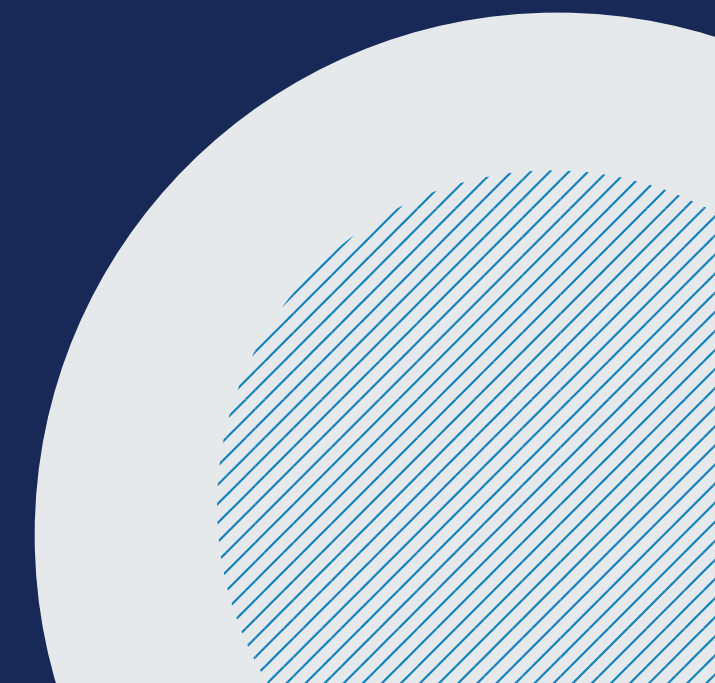




# RECYCLING THE ONE CAMPAIGN

## 2023 Achievements

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306,000  
Video Views  
(Jan-Oct 2023)

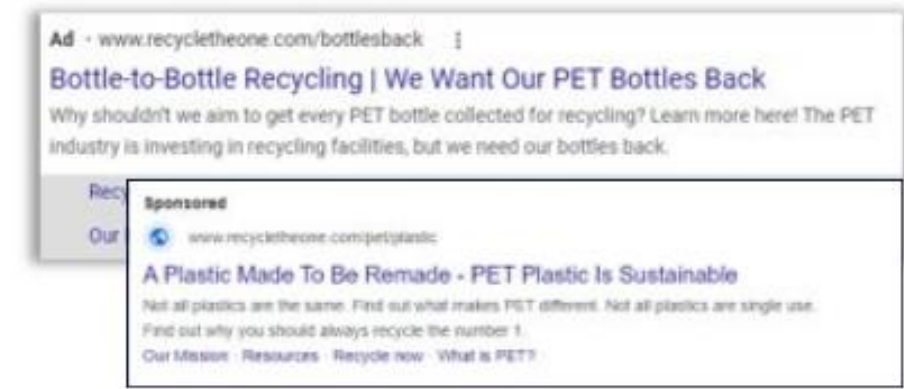
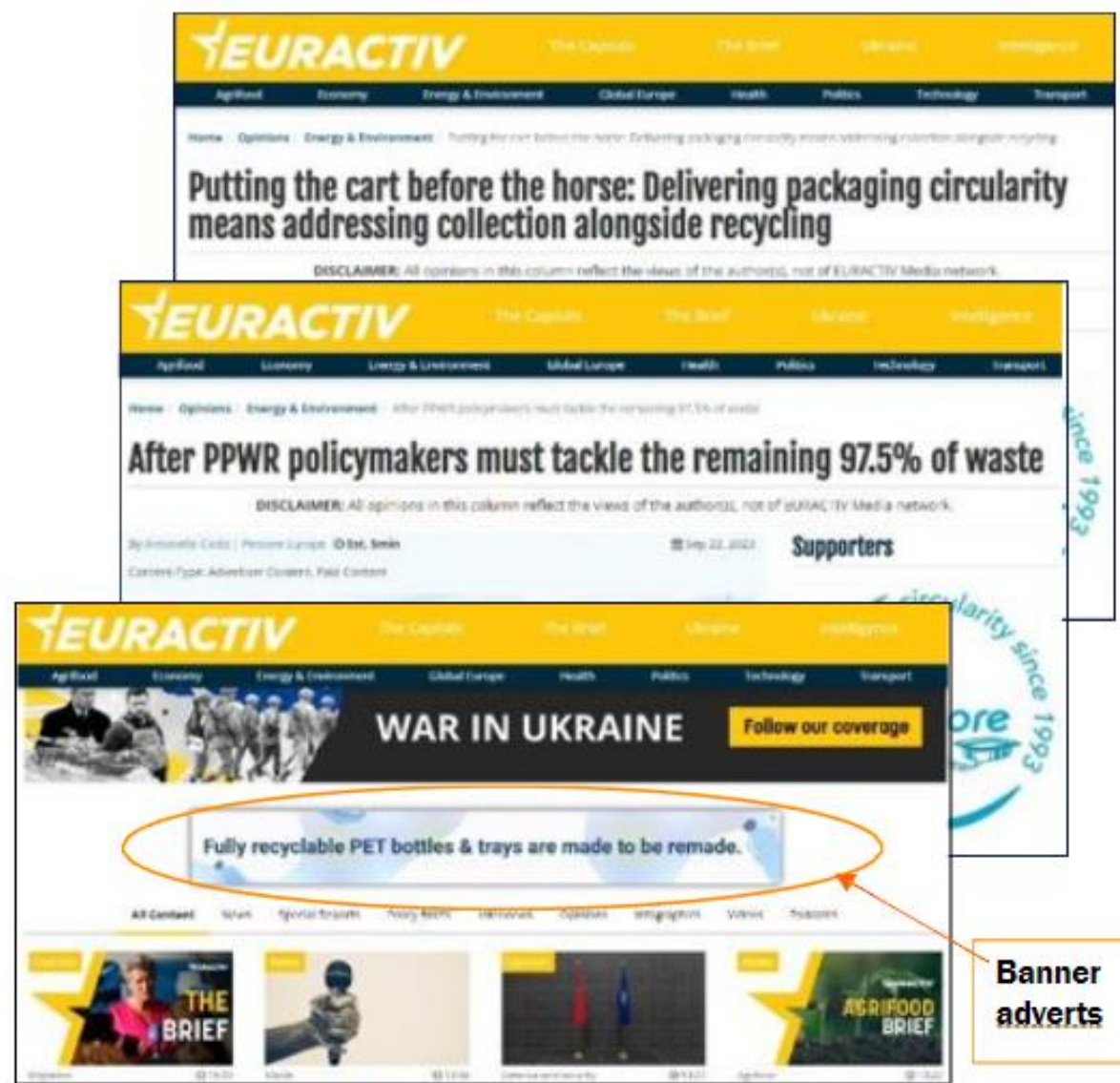
12  
Interactions with EU  
Parliament &  
Commission officials

# EU Policymaker focus

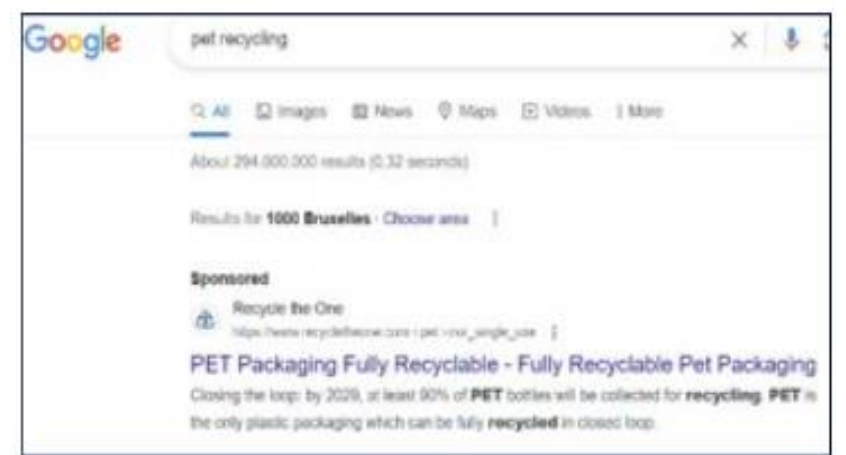
Targeting policymakers on LinkedIn 

Opinion Editorials and adverts in influential Brussels media outlet 

Targeted Google Ads Brussels campaign



Ranking #1 in Brussels for PET recycling



5,000  
Brussels  
website  
visits  
Q1-Q3 2023





**1.409,110**  
Video Views  
Sep 1 - Oct 23, 2023

**64.338**  
Website visits  
from ads

**5,426,165**  
Impressions

# Consumer focus

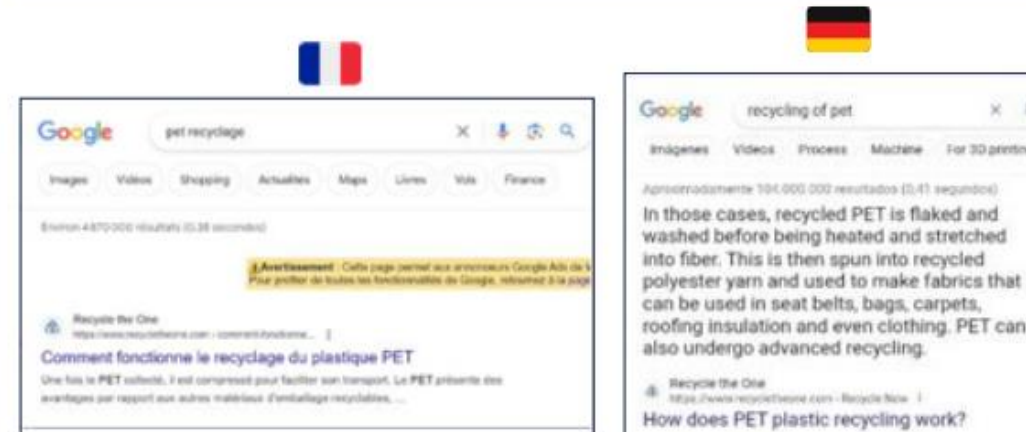
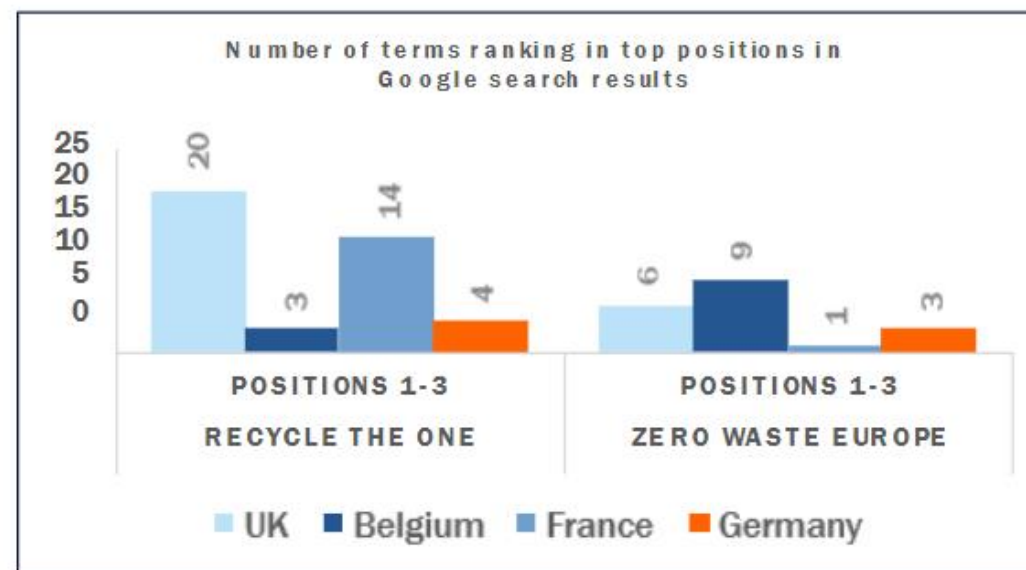
**New Market for 2023:  
Italy**



Italian version of recycletheone.com was launched over the summer. Facebook & Instagram campaigns are now active in Italy and performing very well.



**Recycle The One website is outperforming Zero Waste Europe in terms of ranking on Google and ranks in positions 1-3 for 41 key search terms**



**Meta Campaigns (FR,DE,UK,IT)**



30  
TikTok  
s

# Consumer focus: TikTok (ENG & FR 2023 Results)

## Top 3 Videos



19k

:icws



145k

:icws



141k

:icws



## Example

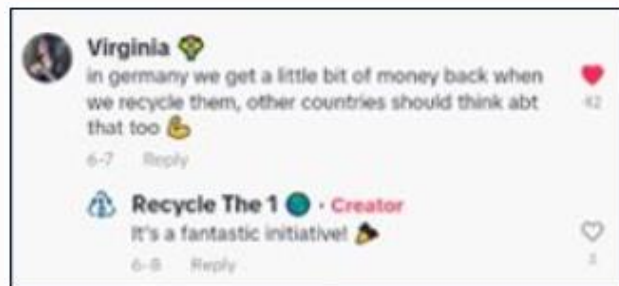


10.539

Video likes

Over  
**2.2 million**  
views  
in 2023

## Fostering an educational PET TikTok community



[Click here to watch more of the campaign's videos on TikTok](#)



**JOIN US IN  
MAKING THE VOICE  
OF THE PET VALUE  
CHAIN LOUDER!**







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[www.petcore-europe.org](http://www.petcore-europe.org)



Annual Conference 2024

[www.petcoreeuropeannualconference.eu](http://www.petcoreeuropeannualconference.eu)



Communications Campaign

[www.recycletheone.com](http://www.recycletheone.com)



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