

PETCORE EUROPE



www.petcore-europe.org



TABLE OF CONTENT

Introduction



Membership



Organisation



UNEP



Working Groups



PET collection & recycling in EU



Recyclability Evaluation Platform



Regulatory & Scientific Affairs



PETCORE EUROPE Events



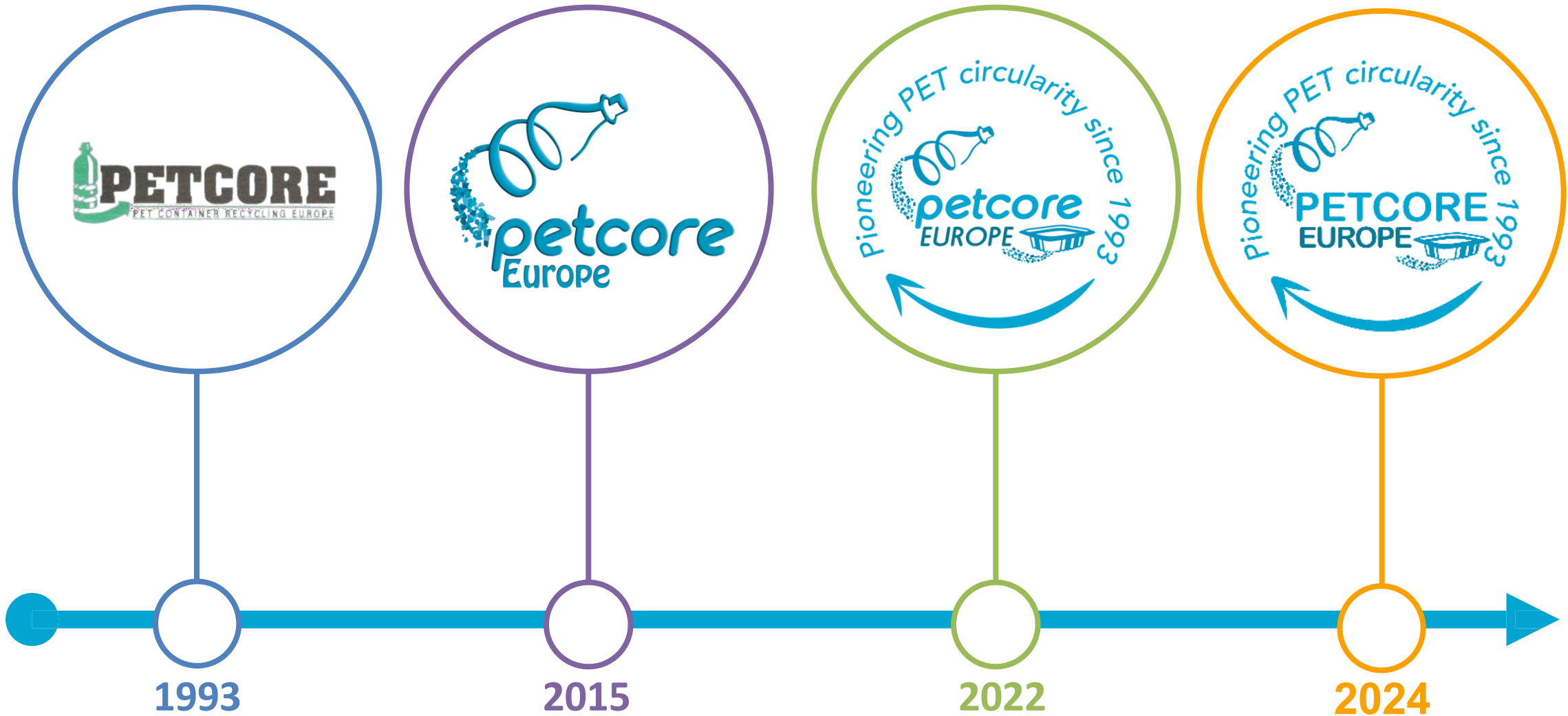
Recycle the One Campaign



INTRODUCTION



HISTORY OF OUR PRESENCE SINCE 1993



PETCORE EUROPE VISION & MISSION



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.

The Mission of PETCORE EUROPE is to position PET as packaging material of choice in a sustainable circular economy.

PETCORE EUROPE GOALS



The Goals of PETCORE EUROPE are to ensure that:

The entire PET industry is well aligned and joins mutual forces to deliver sustainable growth across the whole value chain for its members and partners.



PET is recognized as an environmentally friendly material and as an outstanding contributor to the EU Circular Economy.

PETCORE takes initiatives and leads or contributes to specific projects, Working Groups and communication media, which effectively demonstrate such a recognition by:



Supporting and validating innovative packaging solutions which provide true life-cycle environmental benefits including post-consumer recycling.

Working with all relevant parties to ensure continuous increase of post-consumer PET collection, recycling, and usage.



Sharing a solid expertise to validate the recycling capability of the PET products for both food and non-food applications in the circular economy.

PETCORE will rapidly respond to any concern on products made by vPET and/or rPET from the public and the institutions using the expertise of its Members.



PETCORE will effectively advocate the benefits brought by the PET value chain so that they are well reflected by the European institutions and other leading European organizations in their respective legal framework and position statements.



**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



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

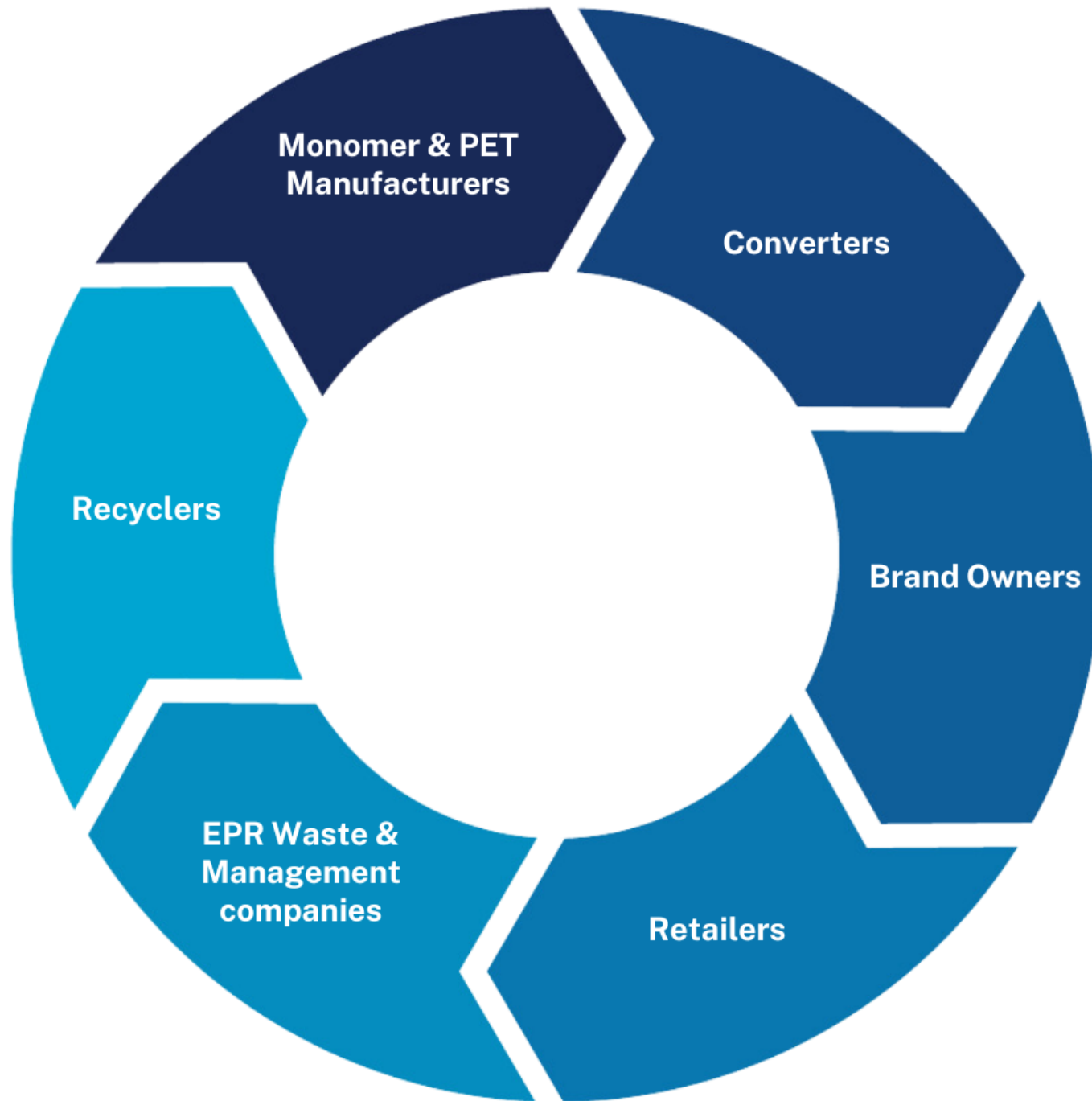


The association representing BOPET film producers in the European market

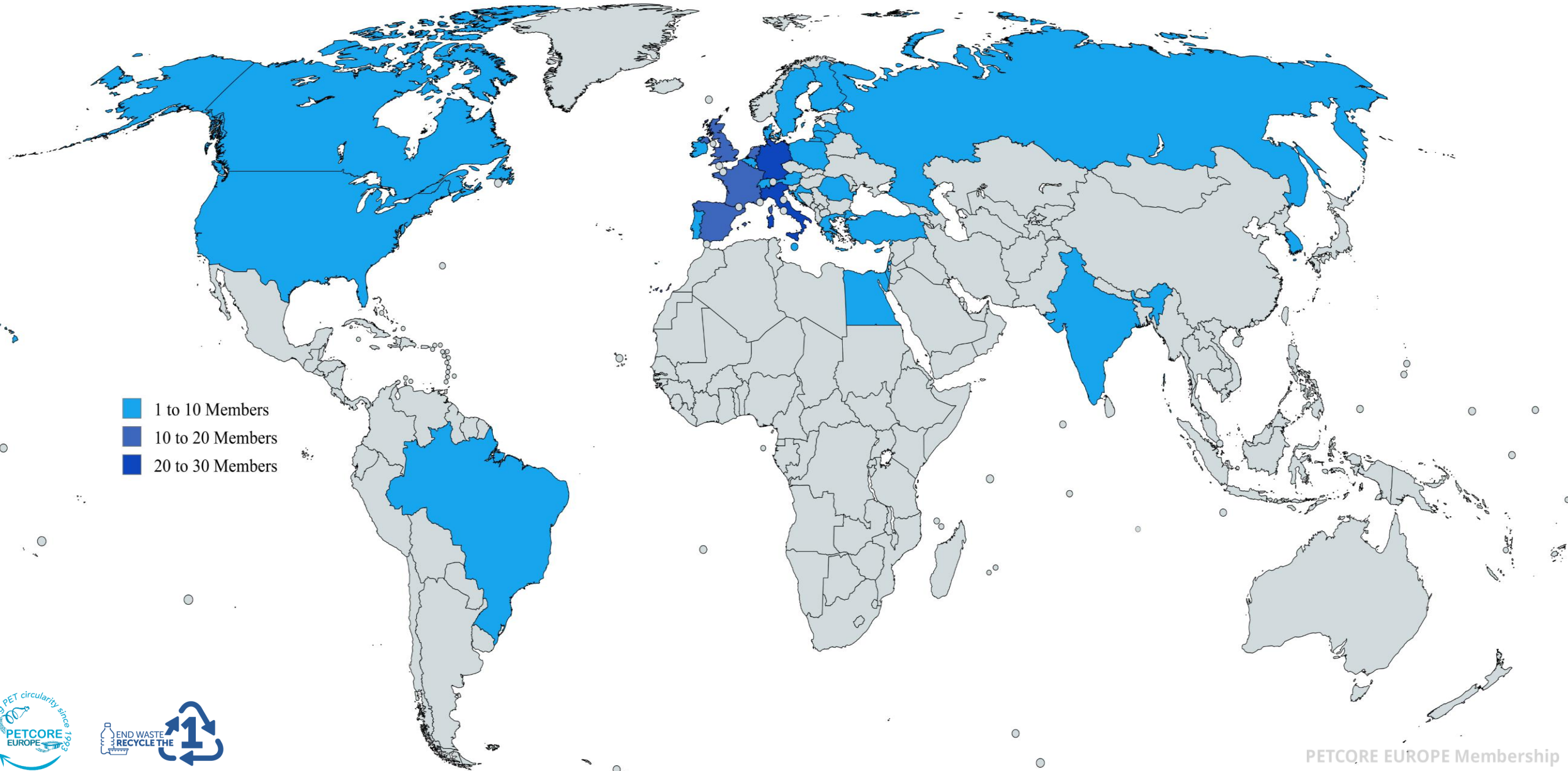


Brussels based association representing global & national soft drinks associations





PETCORE EUROPE MEMBERSHIP PRESENCE





PETCORE EUROPE: the whole EU PET Value Chain



GLOBAL PACKAGING GROUP

ALPLA



AVERY DENNISON



BRUNO FOLCIERI
Granulators for Plastic Materials



Coral



COVINIL

CRODA



DePoly



Drava International d.o.o.



EVONIK
POWER TO CREATE



THE AMERICAS • EUROPE • ASIA

EASTMAN



KEEP IT FRESH.

Faerch



FUCHI FILM



Fuji Seal



GETEC
PARK.EMMEN



Kraft Heinz



HCA
HOLLAND COLOURS



HUSKY



INEOS
Aromatics



interzero
zero waste solutions

PETCORE EUROPE: the whole EU PET Value Chain





UNITED NATIONS ENVIRONMENT PROGRAM (UNEP)



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.

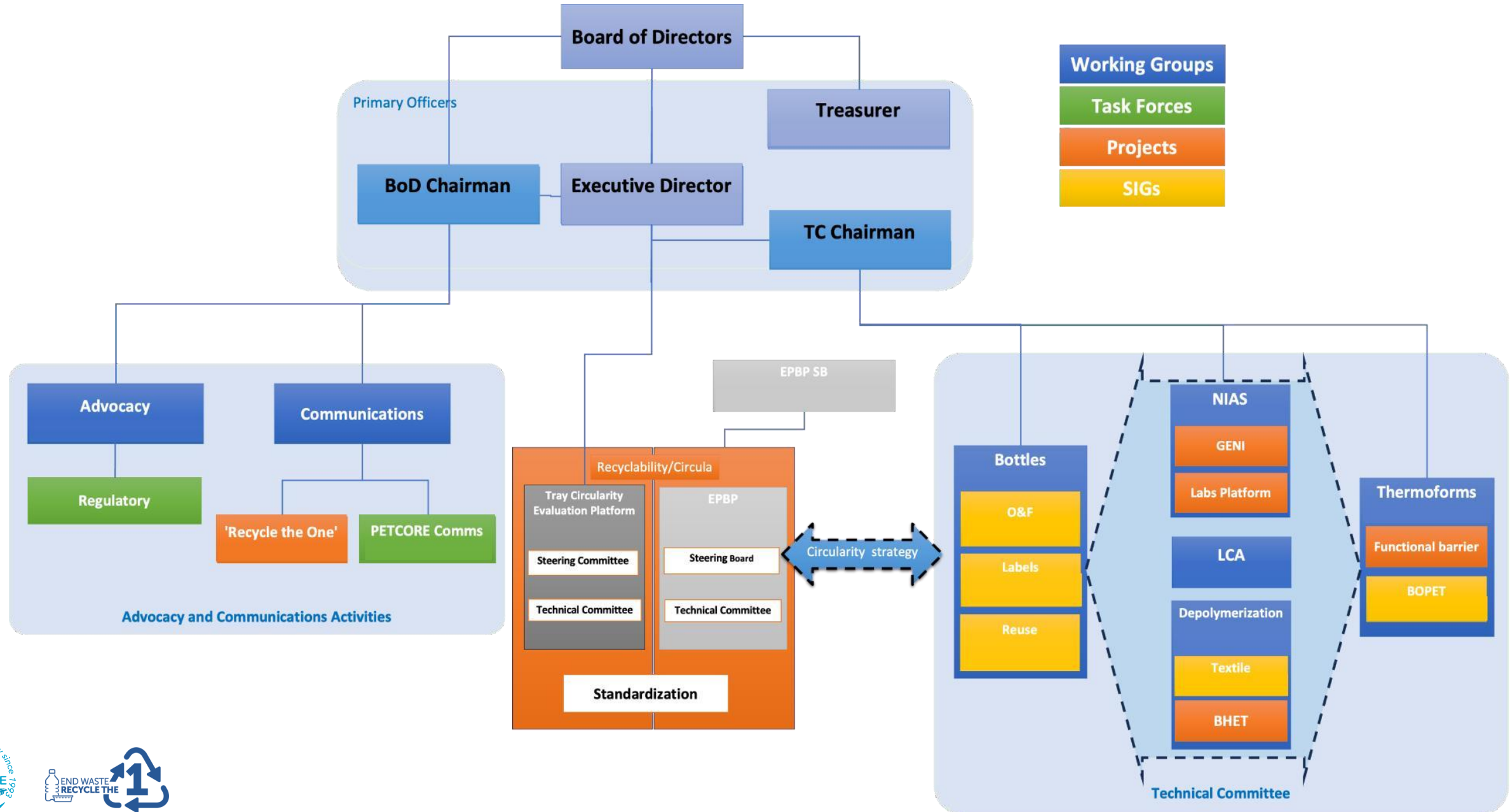
This accreditation allows PETCORE EUROPE to receive invitations to all public meetings and sessions of the **United Nations Environment Assembly** and actively participate in negotiations or stakeholders' sessions (e.g. UN Global Plastics Treaty).



ORGANISATION



PETCORE EUROPE ORGANISATION



PET COLLECTION & RECYCLING IN EU



PET RECYCLING STATUS 2022

ICIS Report 2024

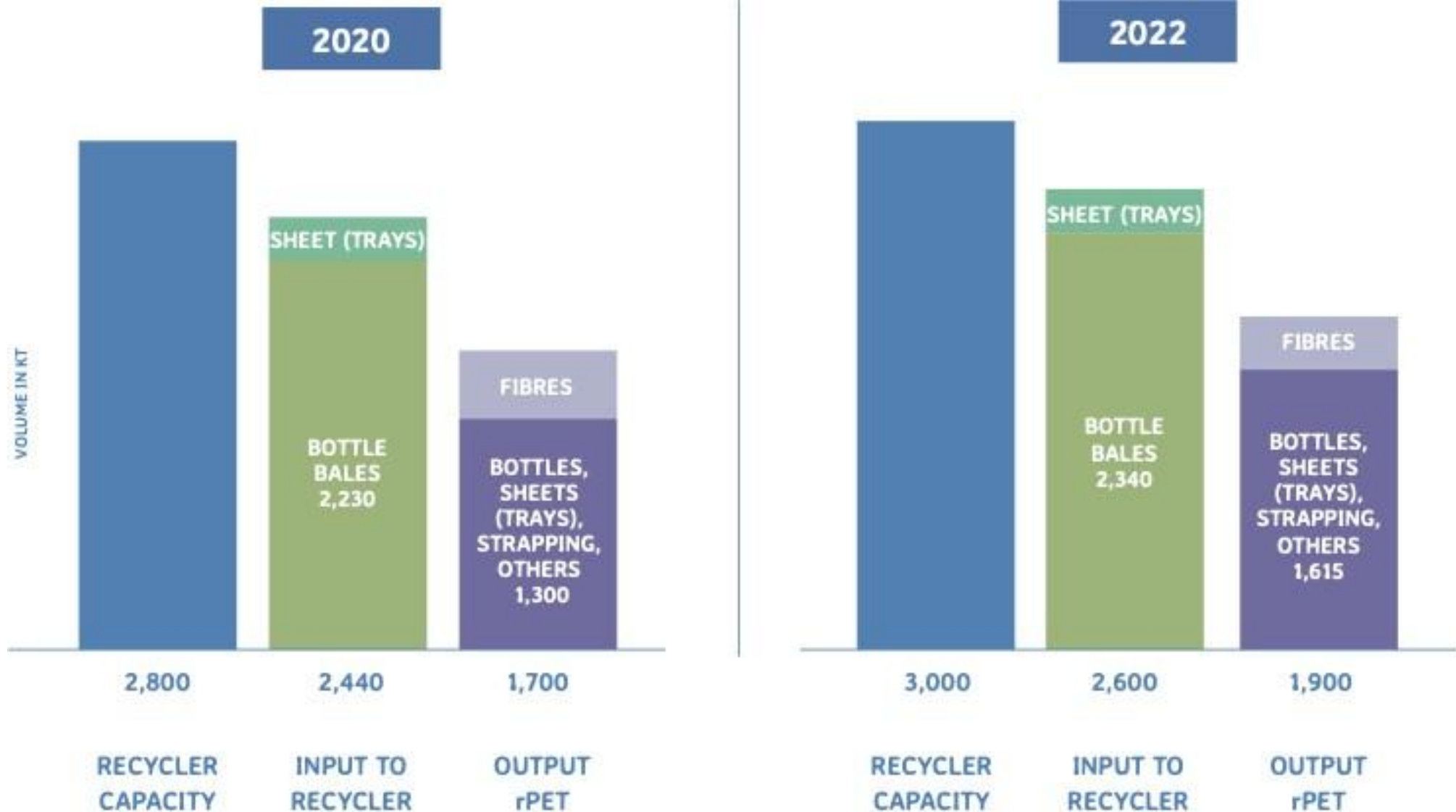
The European PET Packaging industry is striving to increase collection, recycling and recycled content to meet regulatory targets and beyond. The PET Market In Europe State of play report summarizes these efforts:

- 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



PETCORE EUROPE

Working Groups & Task Forces



PETCORE EUROPE Working Groups

- ✓ 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.

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



Recyclability Evaluation Platforms (EPBP and TCEP)



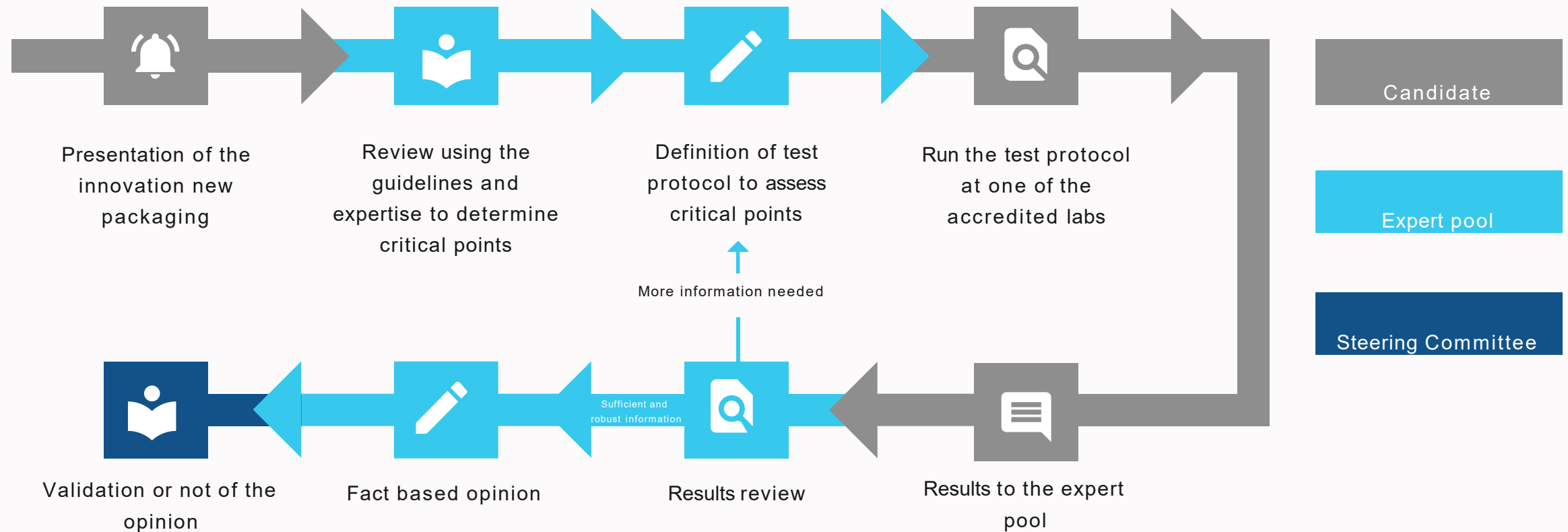
- EPBP and TCEP strongly encourage all companies to bring their new PET bottle – tray solutions to the platforms in order to get an objective third party assessment of their recyclability.



- 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



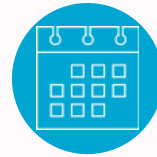
FUNCTIONAL BARRIER CONSORTIUM

- 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

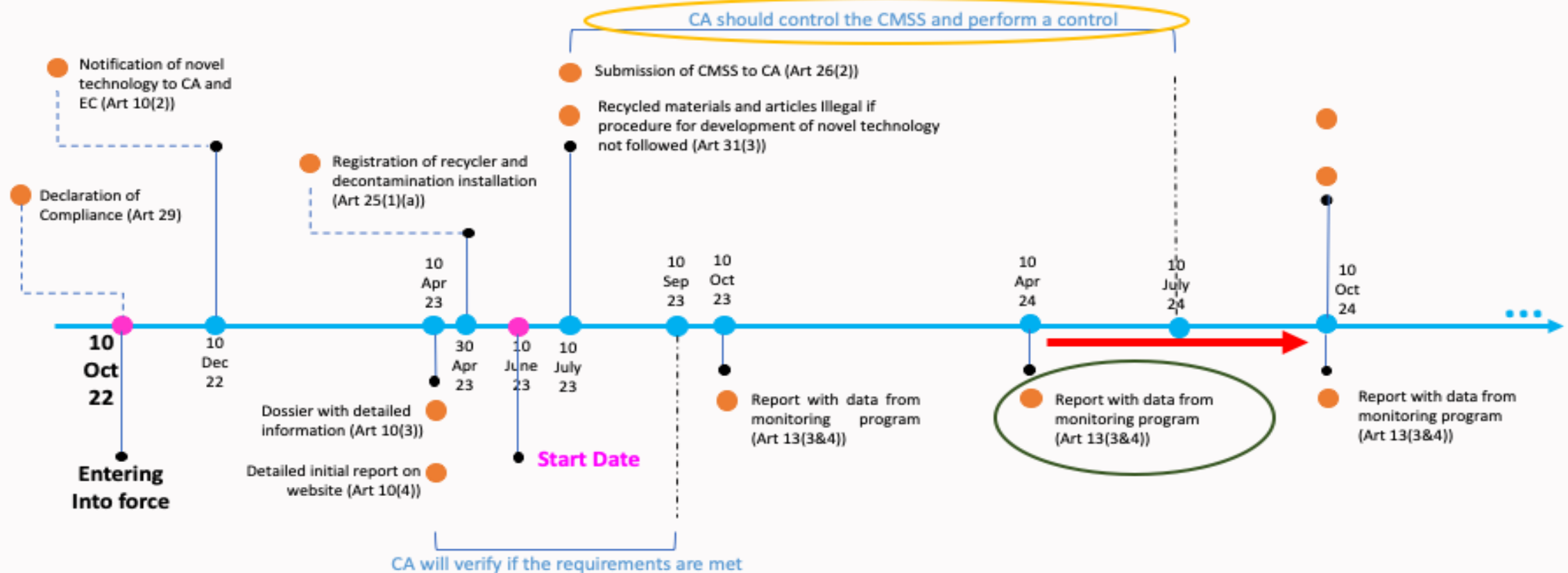
- Provide Technical documentation and dossiers to comply with EU 2022/1616 regulation.
- Deploy monitoring program and sampling plan.
- Maintain continuous dialogue with members and authorities.



Past 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

- 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.



Past activities

- 24th of April 2024 – Steering Committee Meeting. Task force: rebuild and realignment.
- Thermoforming Event in Dijon in 2025.



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 & activities

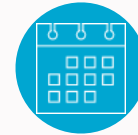
- Focus on food contact impacts of labels (shared activity with FINAT.)
- Revise preferred behavior of adhesives in conjunction with EPBP.
- Assess and promote the deployment of the design for recycling within the industry.

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. analysis.
 - Ease data aggregation and statistical
 - Data trending through the value chain.



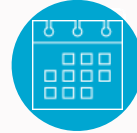
PET DEPOLYMERISATION

- 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

- 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

- 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 27th 2024) are being held to inform about the LABS platform capabilities and evolutions. Stay tuned!



REGULATORY AND SCIENTIFIC AFFAIRS



EP Elections 2024

TODAY 2025

2026

2027

Q1

Q2

Q3

Q4

Q1

Q2

Q3

Q4

Q1

Q2

Q3

Q4

Q1

Q2

...

FCM Framework revision

Scoping paper ?

Policy paper?

?

?

EU 10/2011
and amendments

Quality amendment

EU 2022/1616
and amendments

EFSA Mech Recycl

1

3 Batches PET MR

2

3

Correcting
Regulation

(?)

Amendment foreseen

BPA in FCMs

(?)

Correcting Regulation

Waste Framework
Directive

?

✓

(?)

PPWR

(?)

(?)

(?)

SUP Directive



Amendment impl decision recycled content

?

Directive
Evaluation

Unintent. microplastics

?

✓

(?)

Intent. microplastics
restriction

Reporting

Biobased & BDC Plastic

Sustainable Products
Initiative

ESPR
EC Working Plan

Substantiating green
claims

Interinstitutional negotiations – potential withdrawal by EC?

CLP

REACH

(?)

Call for evidence
/Consultations

Public
Consultation

Impact
Assessment

(?) (Planned) EC
Proposal

Vote EP
Plenary

Final
adoption EP

Ratification
Council

(?) (Foreseen) EC vote

Scrutiny EP & Council

Ordinary legislative
procedure

Publication

Provisional trilogue
agreement

Entering into force

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

Regulatory and Scientific affairs



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.

PETCORE EUROPE EVENTS:

Workshops & Annual

PETCORE EUROPE

Conference





PETCORE EUROPE's Annual Conference 2025: "The PET Value Chain Debating challenges on the journey from SUP to PPWR"



The objective of this in-person conference was to showcase the PET value chain successes and challenges in the shift from a linear to a circular model. The event pushed the industry to take action and join in policy maker consultations to share its knowledge and to encourage them to swiftly develop useful & clear regulations.

📌 This two-day conference featured high-level interventions from the EU representatives such as ✅ Bastiaan Schupp DG SANTE, European Commission, Team Leader EU FCM team ✅ Denis Redonnet - Deputy Director-General – Chief Trade Enforcement Officer, DG TRADE, European Commission ✅ Stefano Soro - Head Of Unit - Net Zero Industries, Sustainable and Circular Products at the DG GROW, European Commission and ✅ Wolfgang Trunk - Policy Officer for the Packaging and Packaging Waste Regulation at the DG ENV, European Commission. Also, business community touched on a wide range of issues, including circularity 🔄: European competitiveness - Circular PET, Regulatory and Legislative Changes, Overview of green deal, Technology Evolution, Global PET Market Challenges, Overview of Mario Draghi's Report, WGs Technical Updates and many others.

- More than 370 confirmed participants
- **Keynote speakers: Bastiaan Schupp (DG SANTE), Denis Redonnet (DG TRADE), Stefano Soro (DG GROW), Wolfgang Trunk (DG ENV)**
- More than 200 confirmed companies & organisations
- More than 50 Speakers
- 12 Media Partners
- 12 Sponsors (first time ever!)
- 250 Gala Dinner Attendees

The PET Value Chain
Debating challenges
on the journey from
SUP to PPWR

Critical role of Innovation and AI in regaining
EU competitiveness

4-5 February Brussels Le Plaza Hotel

Speakers:

- Bastiaan Schupp DG Santé European Commission
- Denis Redonnet DG TRADE European Commission
- Stefano Soro DG GROW European Commission
- Wolfgang Trunk DG ENV European Commission

Thermoforms Conference 2025 “PET Thermoforms Circularity: How can collection and sorting of PET Thermoforms be improved?”

PETCORE EUROPE Thermoforms Working Group was launched in June 2015, comprises more than 80 companies and organizations including key players from industry and waste management and had organized events such as online workshops on Recycling PET Thermoforms, and Thermoforms Conference 2023 in Italy & 2024 in Spain.

The objective of this physical event was to promote thermoforms collection, sorting & recycling and specifically tray to tray recycling. We also showcased PETCORE EUROPE Thermoforms WG’s initiatives: Tray Circularity Evaluation Platform (TCEP) and Functional Barrier (FB) task Force. This year’s event focused on collection and sorting that are the next key topics to enhance PET thermoforms recycling throughout Europe. Also, other initiatives on data collection on thermoforms and partnerships with European associations.

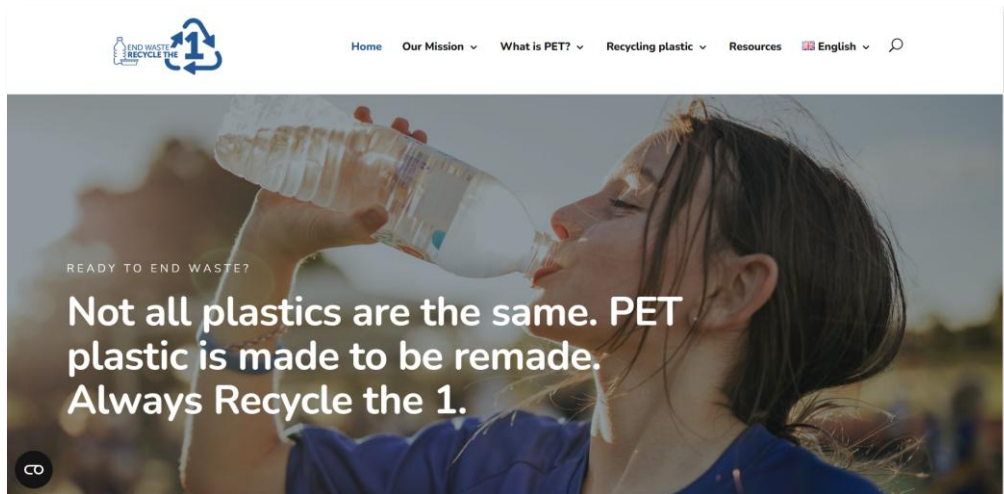
The first day of the event featured the presentations from all the major experts in the field of thermoforms, followed by panel discussions with the guests from the industry. Also, high-level speakers joined us to explain the goals & expectations of the European Commission for the PET trays. While, on the second day PETCORE EUROPE organized a visit to one of the most sophisticated Sorting Plant Visit that showed how efficient collection, and sorting can be for PET thermoforms.



RECYCLE THE 1 COMMUNICATIONS CAMPAIGN



RECYCLE THE 1 CAMPAIGN AT-A-GLANCE



- Launched in 2021
- Funded directly by corporates
- Audiences:
 - EU Policymakers
 - Consumers in France, Germany, Italy and the UK.
- 360° social media & search campaign, driving audiences to recycletheone.com campaign hub, available in 4 languages.
- Monitored against 5 KPIs

EU STAKEHOLDER CAMPAIGN IMPACT (2023 + 2024)

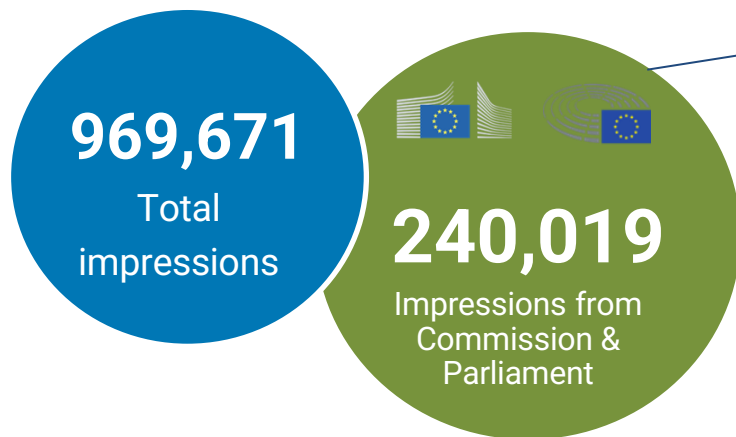


LINKEDIN CAMPAIGN

Our content is reaching an influential Brussels audience. For example:

- Head of office to an MEP
- Member of Cabinet for EU Commissioner for Energy

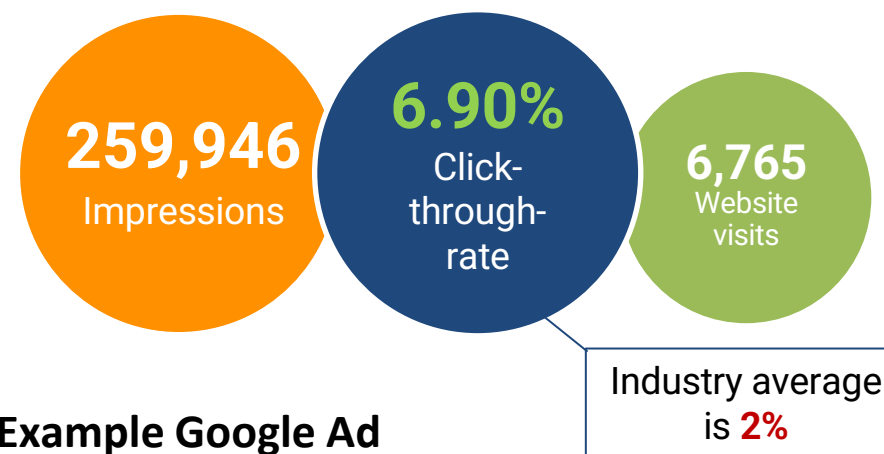
Top job titles reached: Policy officer, policy advisor, parliamentary assistant



85% of impressions
are from European
Parliament &
Commission*
(*Aug-Dec 2024)



GOOGLE ADWORDS CAMPAIGN



Example Google Ad

Sponsored

www.recycletheone.com/pet/not_single_use

PPWR: PET Is Not Single Use - PET: It's Made To Be Recycled

PET Plastic Is Part Of The Circular Solution To End Europe's Waste Problem. Not All Plastics Are The Same. Find Out What Makes PET Different.

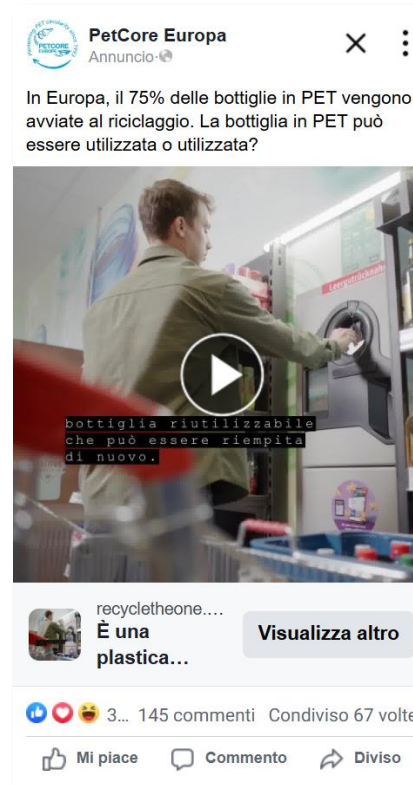
OVERALL CONSUMER CAMPAIGN IMPACT (2023 + 2024)



META CAMPAIGN

12,394,864
Impressions

124,984
Website visits



GOOGLE ADWORDS


903,416
Impressions

59,895
Website visits

8.17%
Clickthrough
rate (CTR) in
2024

Industry average is
2% CTR

Sponsorisé

 www.recycletheone.com/

PET: Entièrement Recyclable - C'est Quoi l'emballage PET

Qu'est-ce que le plastique portant le symbole du chiffre 1 ? Est-il recyclable. Tous les plastiques ne sont pas à usage unique. Découvrez pourquoi recycler le numéro 1.

Gesponsert

 www.recycletheone.com/pet/recycling

Plastik-Recycling Funkioniert - Wird PET-Kunststoff recycelt?

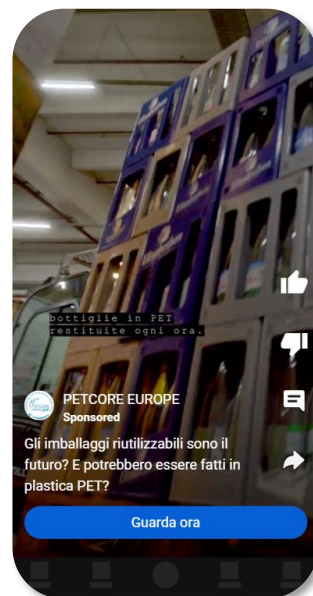
Da sie recyclet werden können, sind PET-Kunststoffflaschen eine Investition in die Zukunft. Es gibt einen VOLLSTÄNDIG recycelbaren Kunststoff. Er heißt PET! Wählen Sie das Beste.

OVERALL CONSUMER CAMPAIGN IMPACT/2 (2023 + 2024)

YOUTUBE CAMPAIGN



2,297,482
Video views



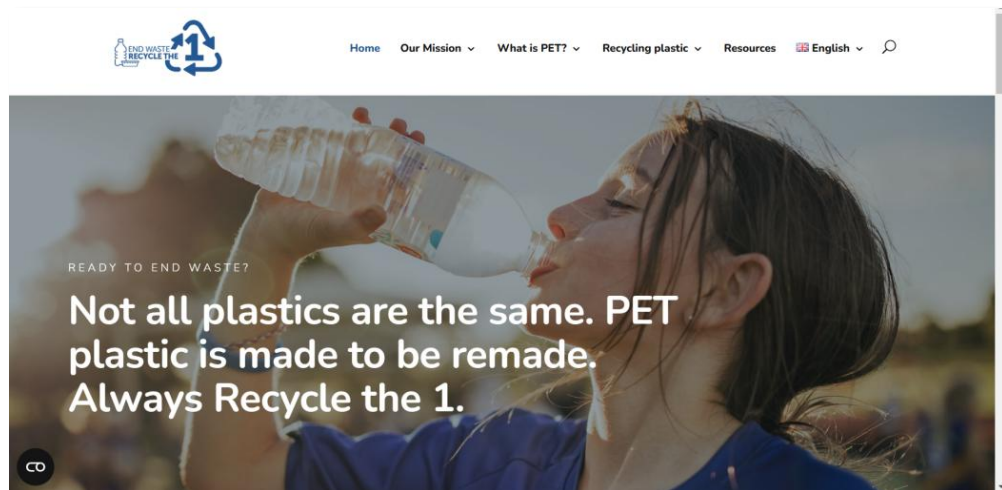
TIKTOK CAMPAIGN



4,345,212
Video views

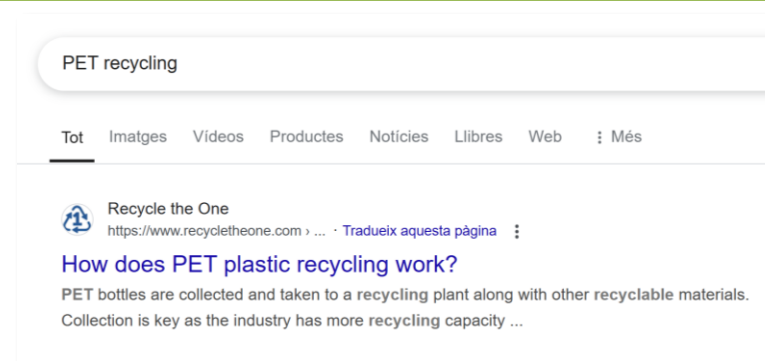
2,907
Followers

DRIVING VISITORS TO THE WEBSITE (2023 + 2024)



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

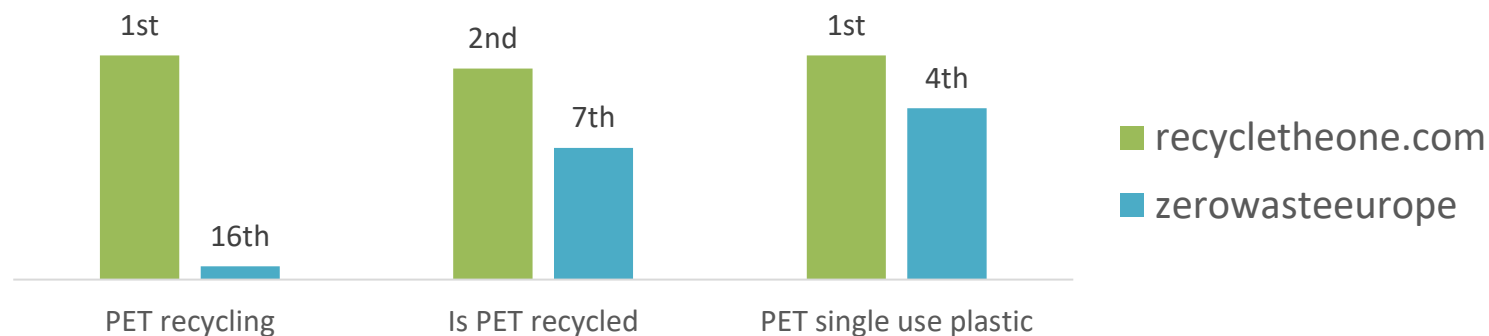
Our website ranks first in Brussels, DE, FR, IT and UK for 'PET recycling'



Google ranking of [recycletheone.com](https://www.recycletheone.com) compared to websites discussing waste like [zerowasteeurope.eu](https://www.zerowasteeurope.eu) in Brussels

212,963
Pageviews

169,659
Unique
Visitors





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Annual Conference 2025

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Communications Campaign

www.recycletheone.com



**END WASTE
RECYCLE THE**



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