

PETCORE EUROPE



www.petcore-europe.org



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INTRODUCTION



HISTORY OF OUR PRESENCE SINCE 1993



1993



2015



2022



2024

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

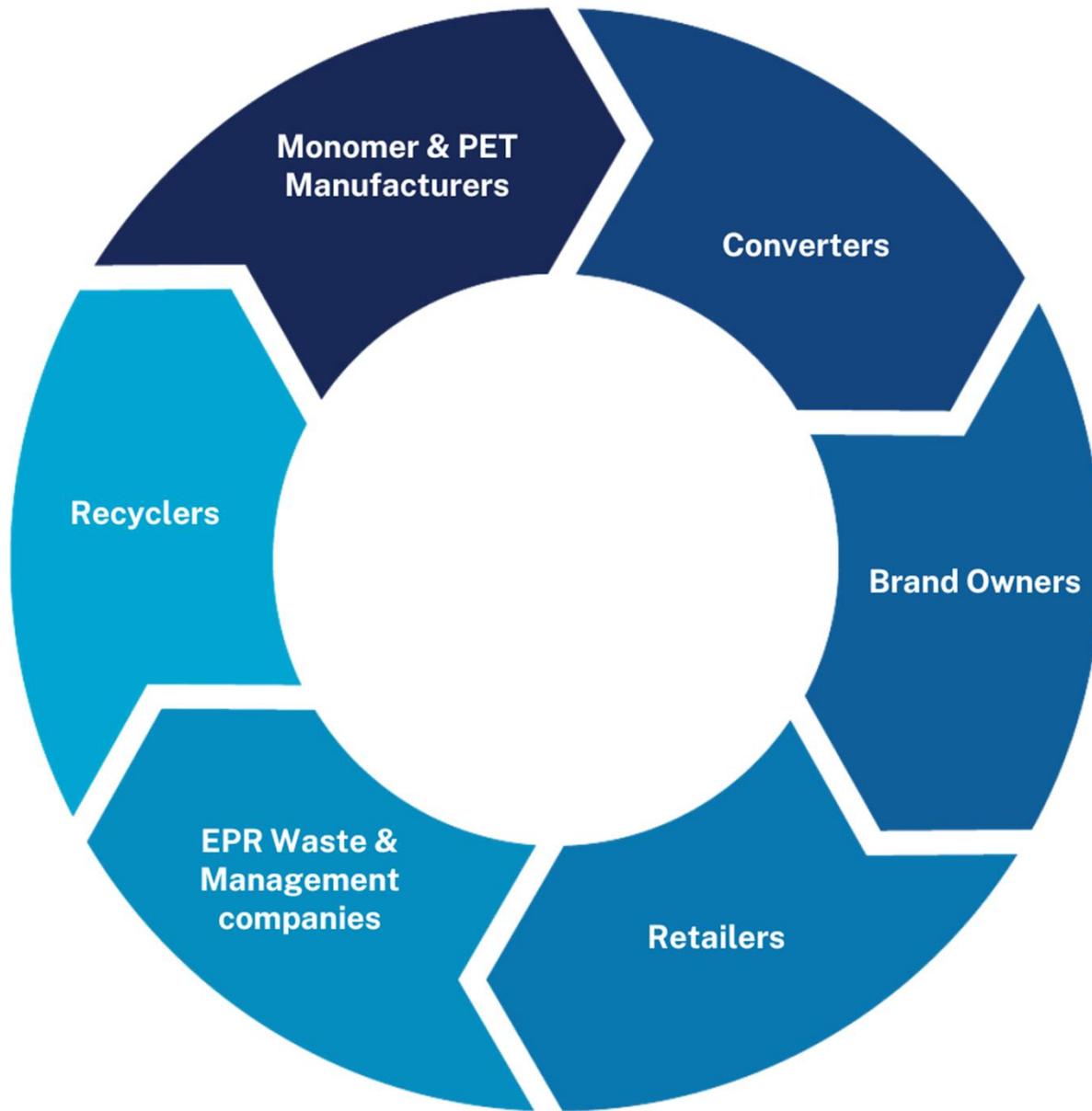


The association representing BOPET film producers in the European market



Brussels based association representing global & national soft drinks associations

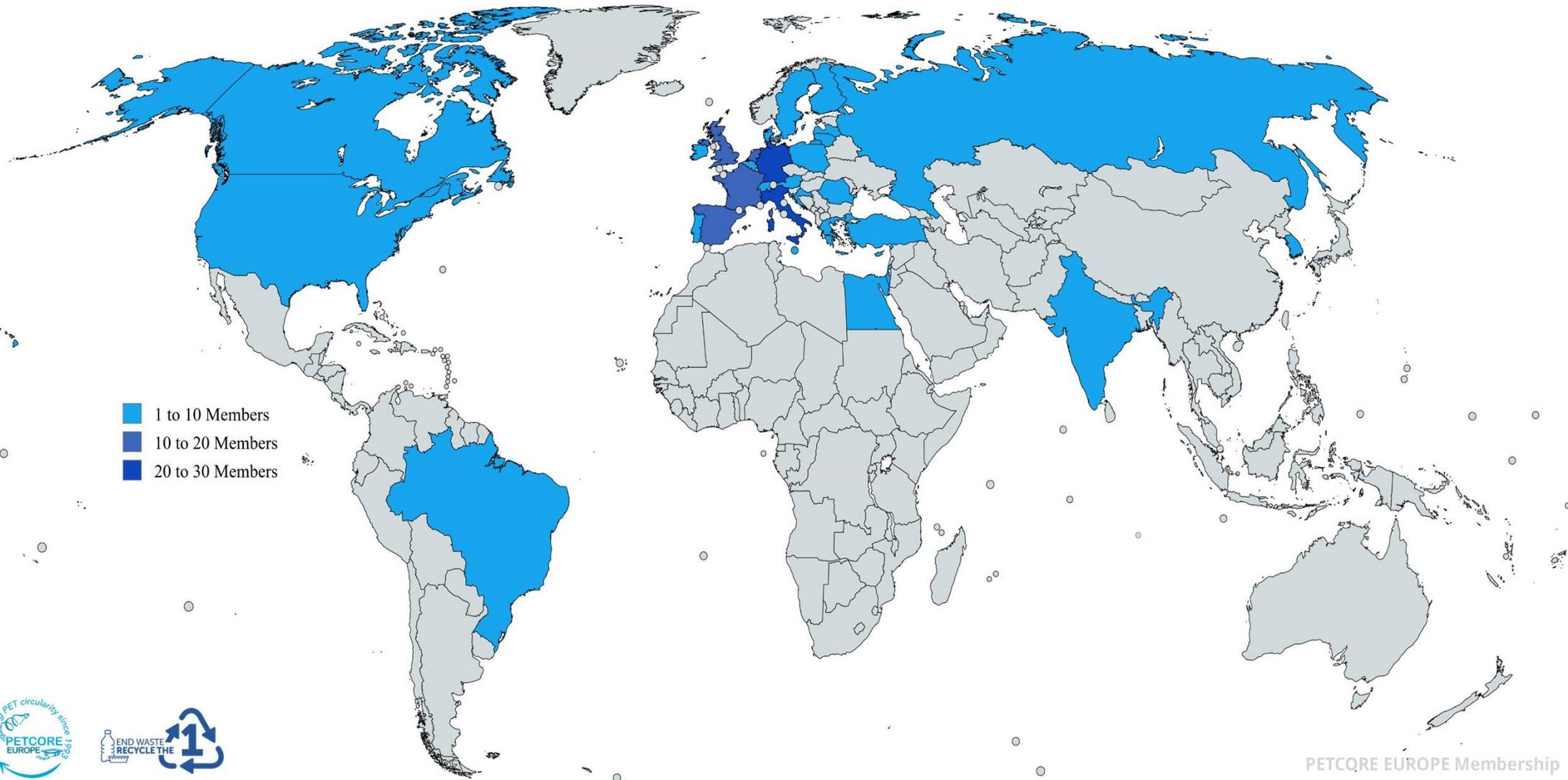




PETCORE EUROPE: the whole EU PET Value Chain



PETCORE EUROPE MEMBERSHIP PRESENCE



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.

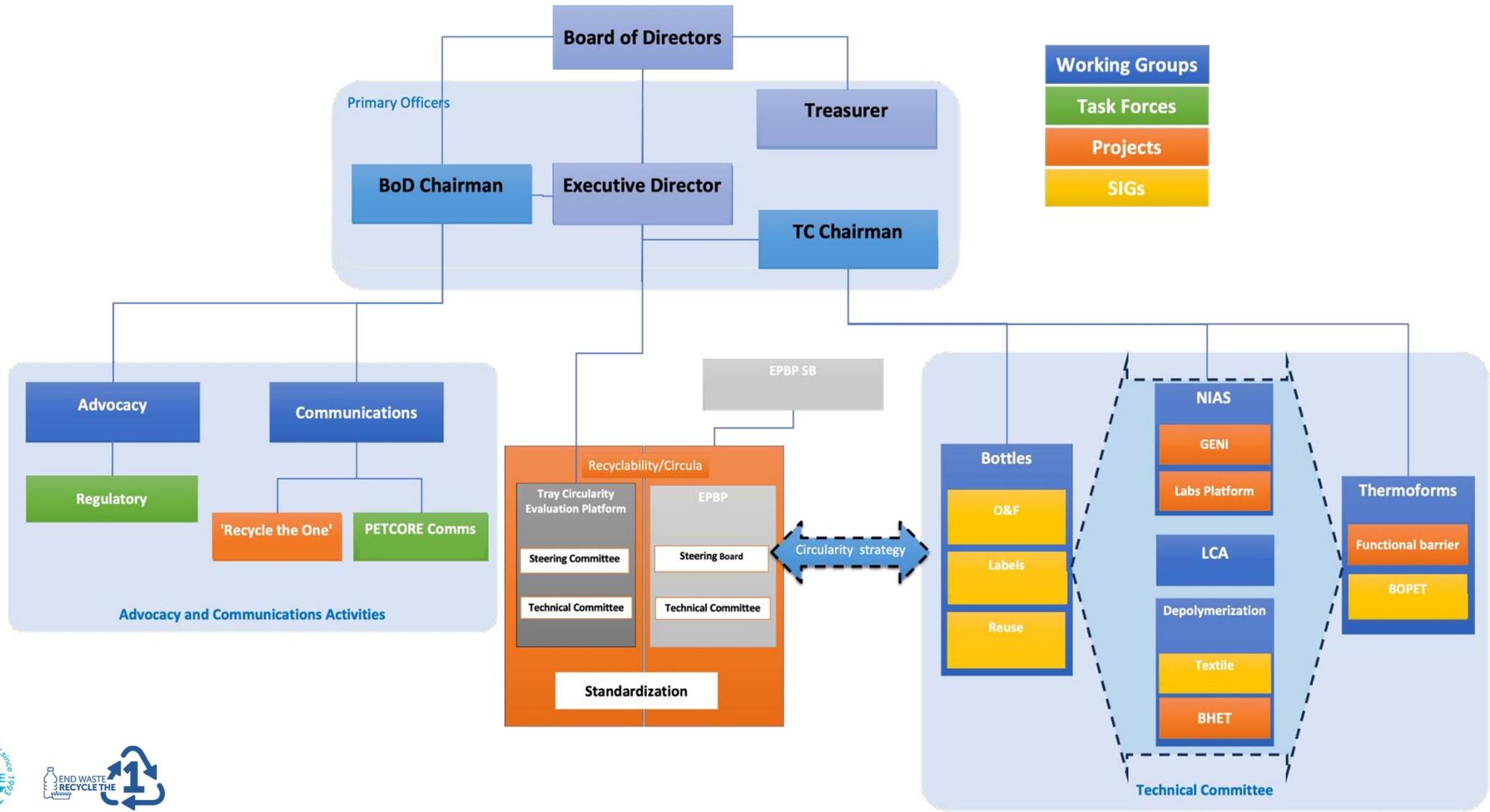
This accreditation allows PETCORE EUROPE to receive invitations to all public meetings and sessions of the **United Nations Environment Assembly** and actively participate in negotiations or stakeholders' sessions (e.g. UN Global Plastics Treaty).



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...

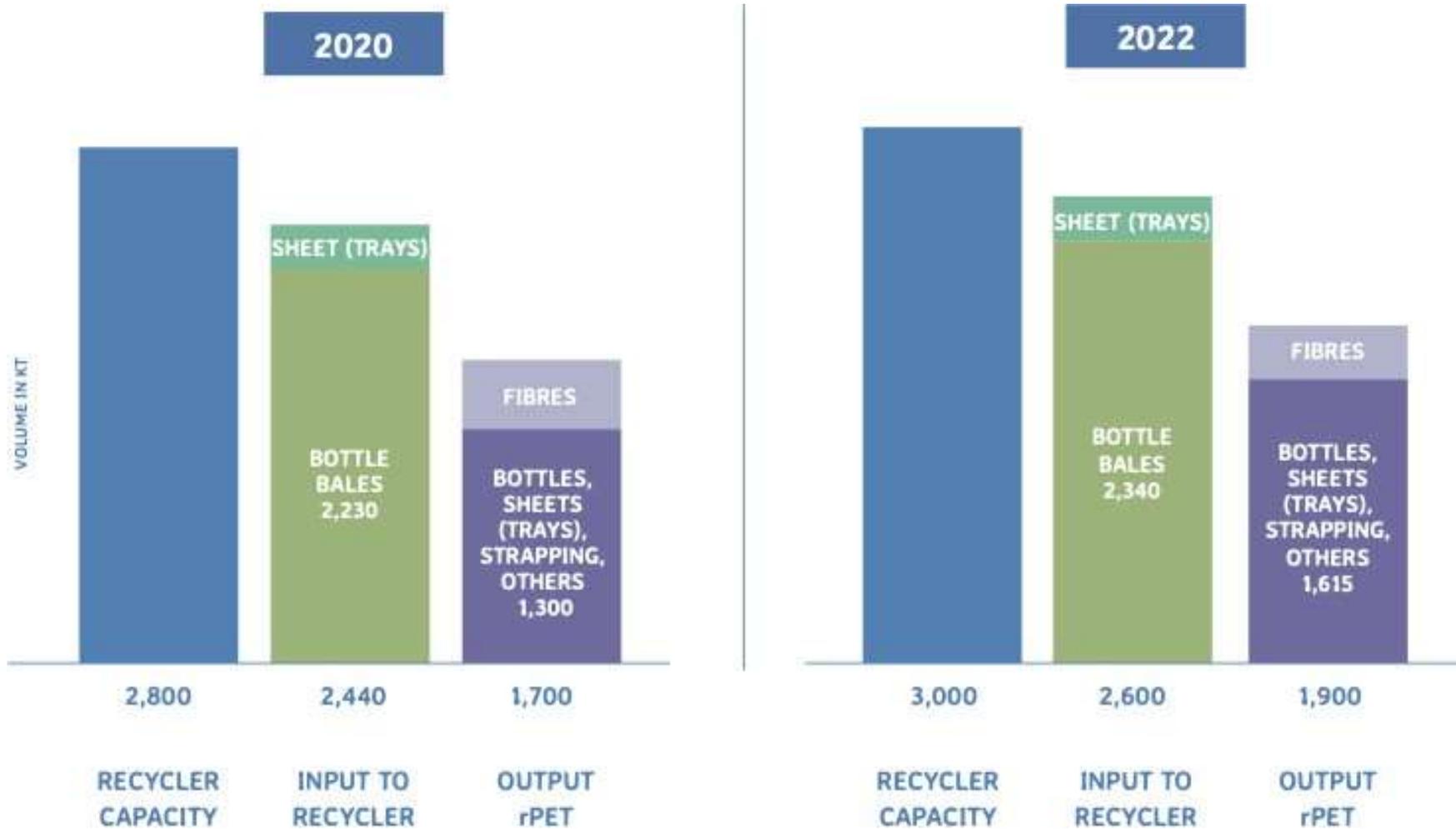
The report has been developed in collaboration with PRE, UNESDA and NMWE. Have a look at it to have in-depth insights



PETCORE EUROPE PET collection & recycling in EU



PET RECYCLING EVOLUTION



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



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.





ADVOCACY

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.



ADVOCACY

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)



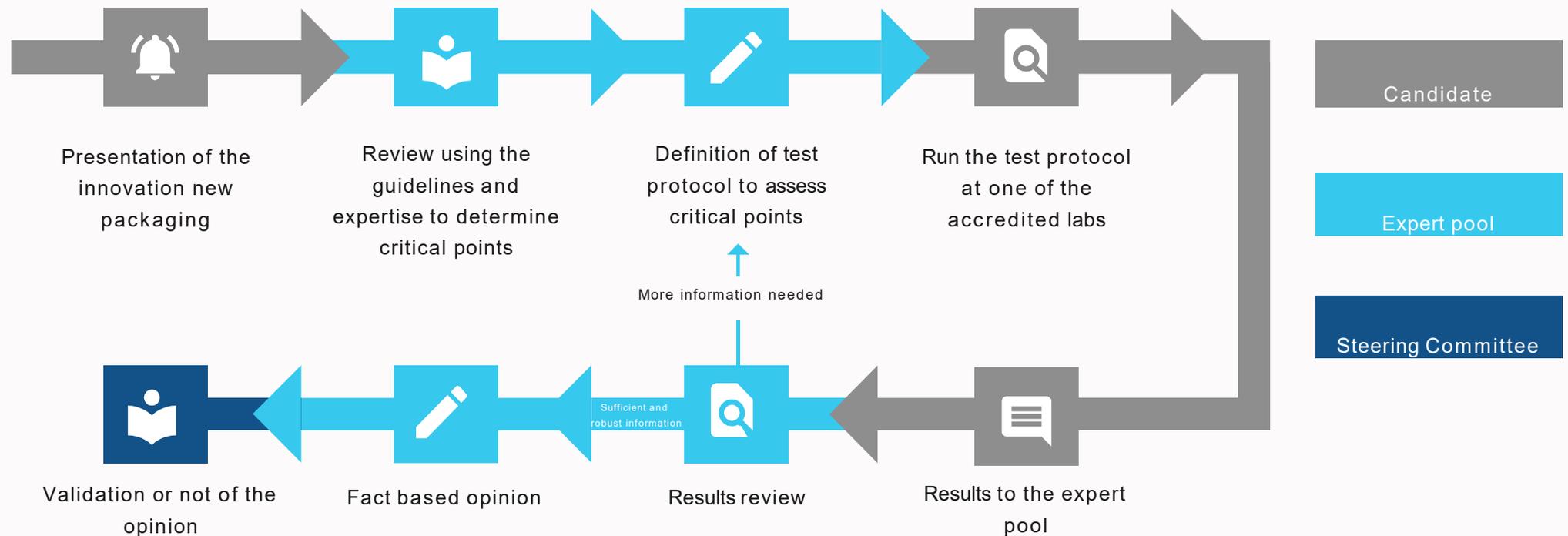
- EPBP and TCEP strongly encourage all companies to bring their new PET bottle – tray solutions to the platforms in order to get an objective third party assessment of their recyclability.



- 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.

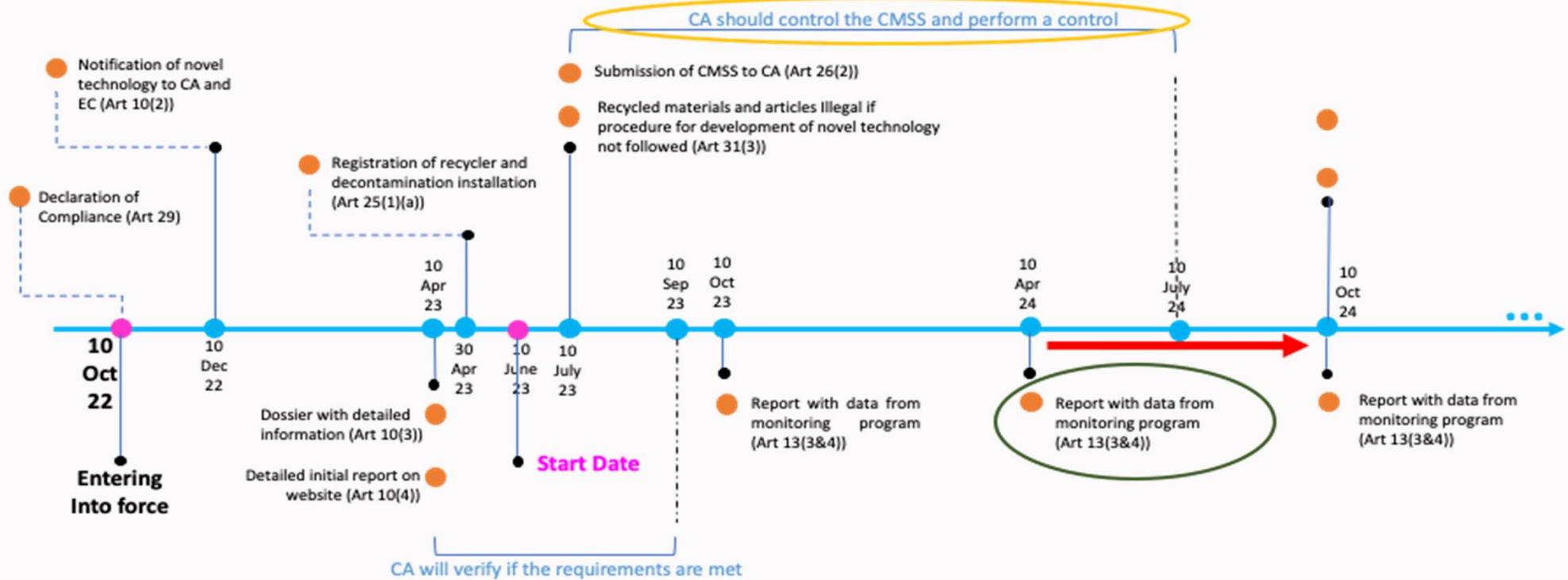


Upcoming activities

- 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

- 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

- 24th 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

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



SAVE THE DATE
Petcore Europe - KÖR 4th 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 AM

PETCORE EUROPE Working Groups



REGULATORY AND SCIENTIFIC AFFAIRS



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.



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

1st batch PET MR authorisations

BPA in FCMs

Waste Framework Directive

Interinstitutional negotiations ?

PPWR

SUP Directive

Amendment impl decision recycled content ?

Unintent. microplastics

Interinstitutional negotiations ?

Intent. microplastics restriction

Reporting

Biobased & BDC Plastic

Sustainable Products Initiative

Substantiating green claims

Interinstitutional negotiations

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

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 is to showcase the PET value chain successes and challenges in the shift from a linear to a circular model. The event will push 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 will feature 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 will be touching 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 300 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
- 11 Sponsors



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

Bastiaan Schupp DG Santé
European Commission

Denis Redonnet DG TRADE
European Commission

Stefano Soro DG GROW
European Commission

Wolfgang Trunk DG ENV
European Commission



SPONSORSHIP PACKAGE

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.

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.



Thermoforms Conference 2024: Towards Circularity of PET thermoformed packaging

- Thermoforms conference 2024 drew 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 have joined us to explain the European Commission's goals & expectations for PET trays.
 - Major experts in the field of thermoform have been featured 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 had an exclusive networking opportunity in combination with extraordinary historic sightseeing in Granada.



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 white banner for a webinar. The top section is white with a blue gradient background. It features the Petcore Europe 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 icon and a recycling symbol on the right. The bottom section is blue with a white gradient background. It features the text 'Petcore Europe IS THE ASSOCIATION REPRESENTING THE COMPLETE PET value chain in Europe' on the left, the date '19 MARCH' and a 'SAVE' button in the center, and the time '2:00 - 5:30 PM CET' on the right.

PETCORE EUROPE'S ANNUAL CONFERENCE 2024

- PETCORE EUROPE Annual Conference 2024 was held in Brussels on 7-8th of February as an in-person event.
-

- 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

2024 Analysis

Recycle The 1 Campaign



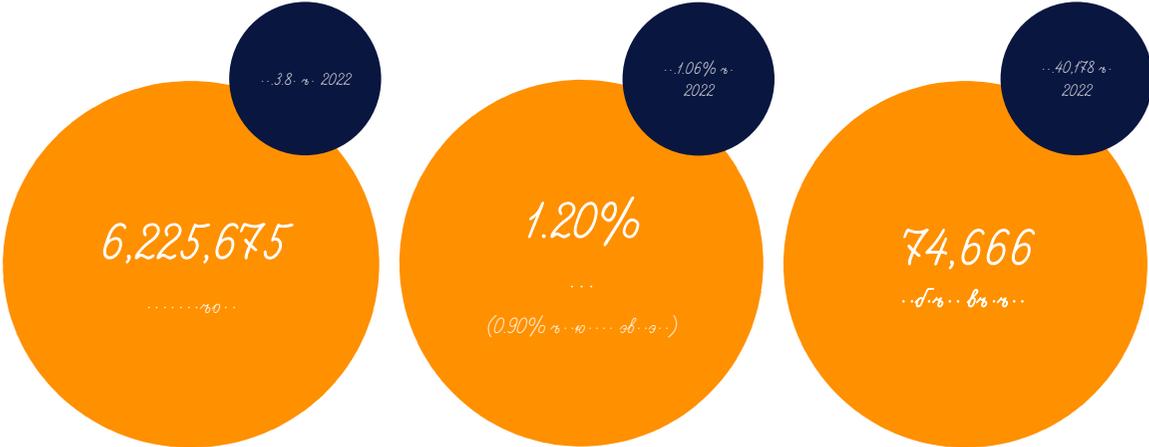
2024



As of: 30/11/2023



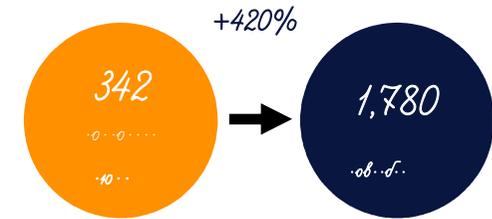
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Throughout 2023, Meta has been a high-performing platform, effectively reaching the consumer audience in our key markets (UK, France, Germany and Italy).
The campaigns have successfully delivered over 2.4 million more impressions, a notable improvement in CTR and over 34,000 more clicks-through to the website than the activity ran in 2022.



As of November 28



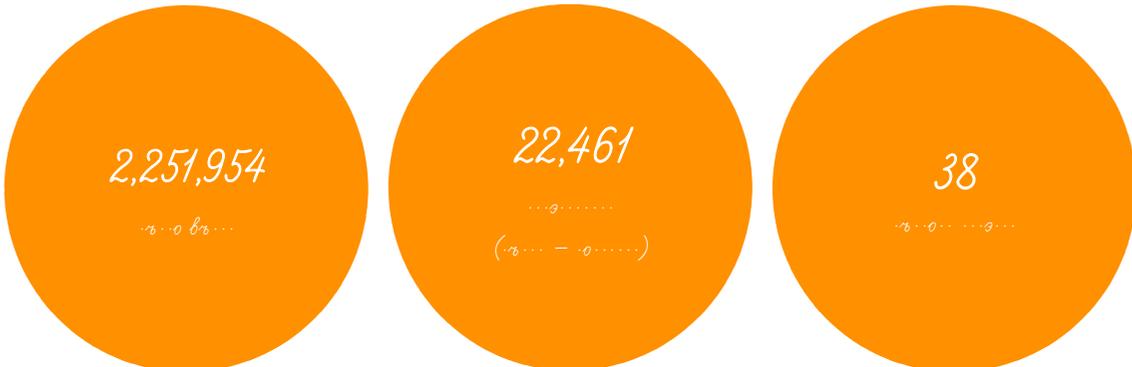
The 'Recycle The 1' TikTok campaign was launched in November 2022 to leverage the exponential growth of the platform among the under-35s market, who also use the platform to educate themselves on various topics.

TikTok's 'playful' format allowed us to work with creators to produce engaging vertical-form video content designed to educate consumers about PET in a fun way.

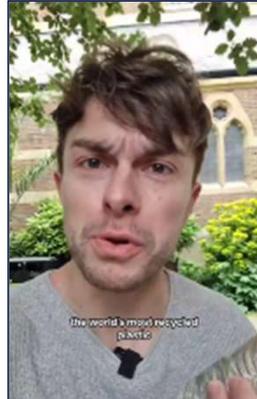
TikTok became a core platform for our consumer campaign and was launched in France in June 2023. Our videos have been viewed over 2.8 million times since the TikTok was launched in October 2022.

TikTok has allowed us to convey PET's recyclability credentials in an easily digestible way to younger audiences who are conscious of the environmental impact of packaging options.

Top 3 videos of 2023



Top 3 videos this year



63,000 views



141,000 views



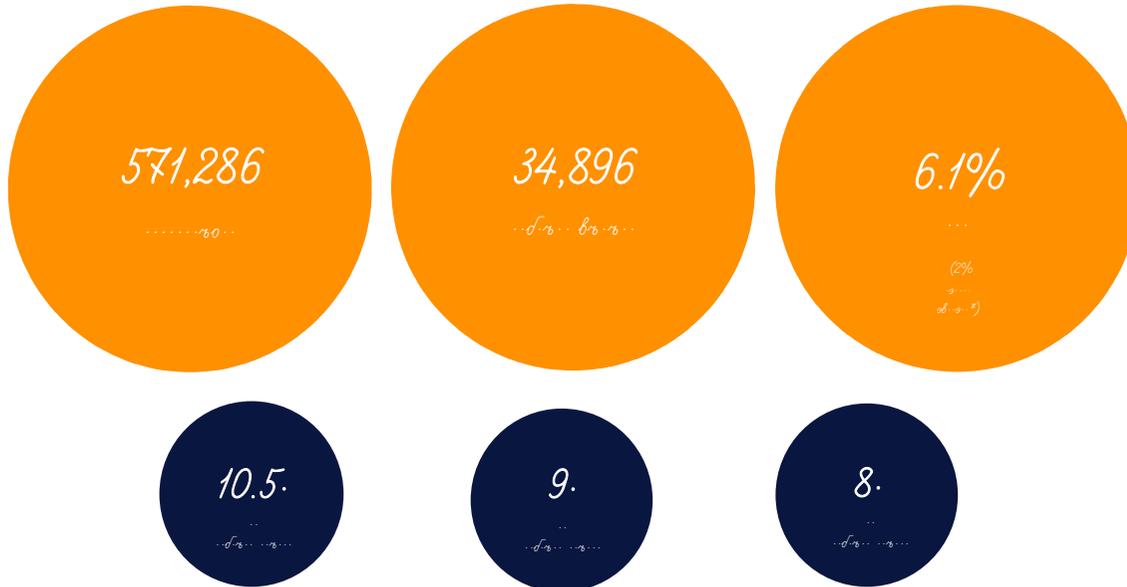
57,000 views

As of: 30/11/2023

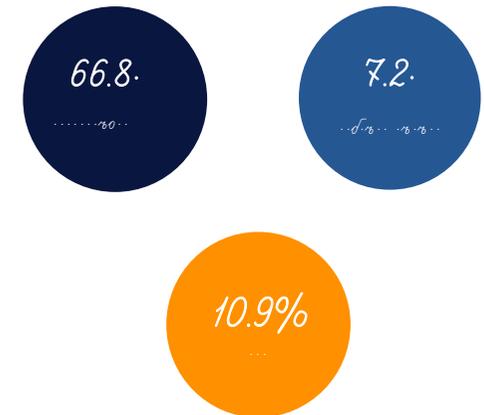


Sponsorizzato
www.recycletheone.com/pet/plastica
Il PET Non È Monouso - La Plastica Più Riciclata: PET
 Le bottiglie di plastica PET sono fatte per essere rifatte. Scopri come. Scopri tutto sul PET, la plastica più riciclata al mondo. PET è fatto per essere rifatto.

8.8.2023



Italy (launched Aug 28)



Sponsorisé
www.recycletheone.com/pet/plastique
Le N°1 Du Plastique: le PET - Conçu Pour Être Retransformé
 Les bouteilles en PET sont conçues pour être retransformées. Plastique? Pas toujours à usage unique! Découvrez pourquoi TOUJOURS recycler le numéro 1.
 Nos ressources · Qu'est-ce que le PET? · Recyclez dès maintenant · Notre mission

Sponsored
www.recycletheone.com/pet/plastic
A Plastic Made To Be Remade - PET Plastic Is Sustainable
 Not all plastics are the same. Find out what makes PET different. Not all plastics are single use. Find out why you should always recycle the number 1.
 Our Mission · Resources · Recycle now · What is PET?

Gesponsert
www.recycletheone.com/pet/recycling
Wie Wird PET-Flasche Recycelt? - Der Ganze Recycling Kreislauf
 Es gibt einen VOLLSTÄNDIG recycelbaren Kunststoff. Er heißt PET! Wählen Sie das Beste. Achten Sie auf das Symbol #1! Prüfen Sie, ob die Flasche Vollständig recycelbar ist.
 Ressourcen · Unsere Mission · Jetzt recyceln · Was ist PET?

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Annual Conference 2024

www.petcoreeuropeannualconference.eu



Communications Campaign

www.recycletheone.com



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