



Petcore Europe

2024 Presentation

www.petcore-europe.org



Foundation in 1993



Publications

Minutes of the First Meeting of the PETCORE Board, December 1st 1993,
Sheraton Airport Hotel, Brussels.

Present

E. Berci	Inca
P.J. Bruce	ICI
R.A. Crawshaw	Shell
R. Enter	AKZO
P. Geluk	Eastman
G. Kleimenhagen	EAPC
M. Matteoli	Johnson Controls
M. Rodriguez	Continental PET
J. Sami	Eastman
H-J. Otto	Hoechst

V. Matthews, Secretary and Mrs N Russotto of APME.

H. P.M. van Hassel of Constar apologised for not being able to attend.

Design for recycling
(in English/F/G/I/Sp)

Nov 1993

PETCORE Launch

Dec 1993
(Press R for Jan 10th 1994)

PETCORE Brochure

Jan 1994?

PETCORE Recycling options





Jan 1994?

PETCORE Specifications

Feb 1994?

Petcore Europe Mission



- • Represent the PET value chain within the EU Institutions and all other stakeholders.
- • Ensure that PET is positioned as an outstanding packaging material and recognized as 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.

Petcore Europe in figures



- **157 members**
- 400 companies
- 500 sites across Europe
- 27'000 employees
- 4,5 million tonnes utilized
- 15 billion turnover in 2022



More than 2 million tons of post-consumer PET was collected in 2020 according to Eunomia, representing 61% of bottles placed on the EU market.



Petcore Europe Membership

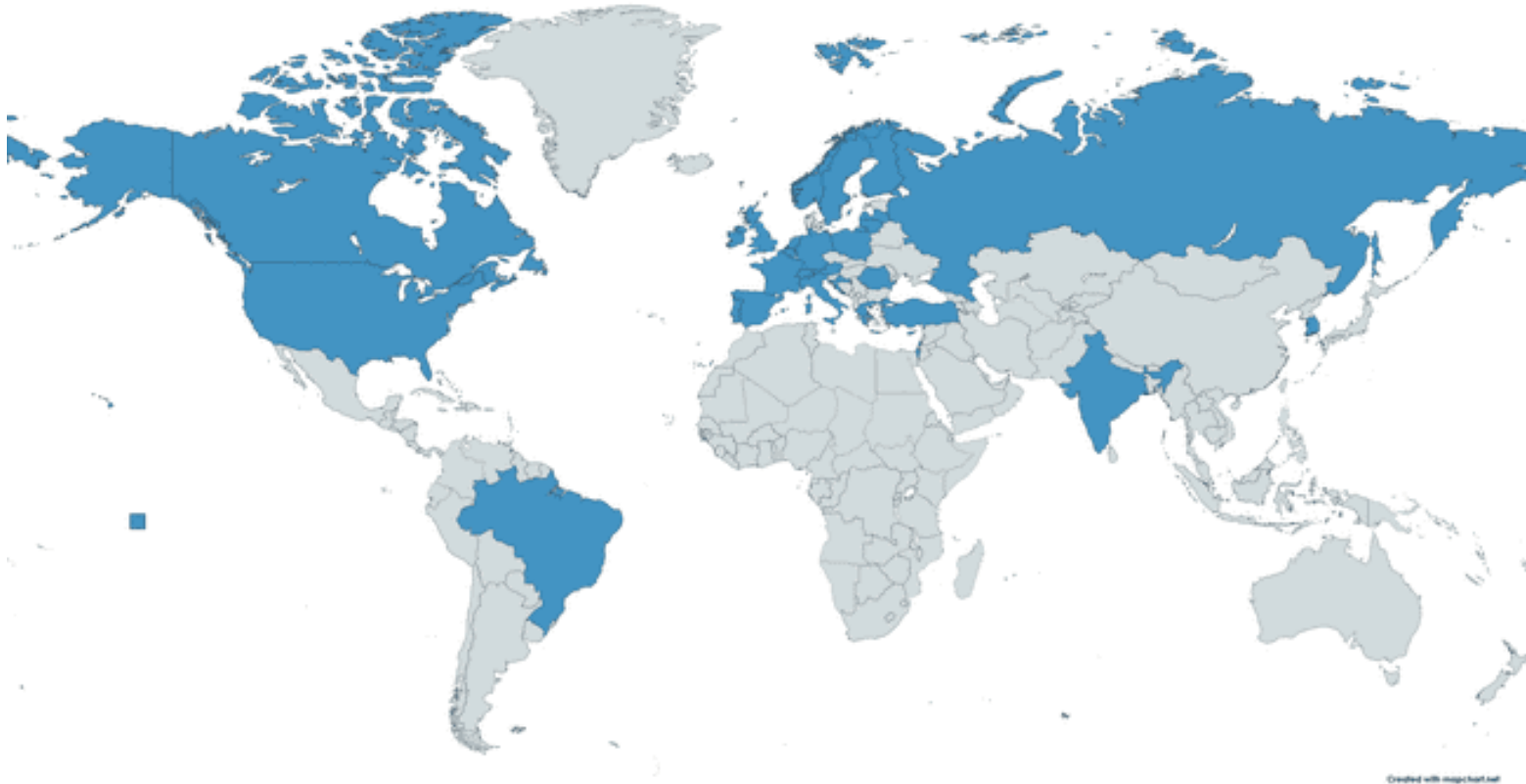


9 Associations:

- **PET Europe:** represents 100% of European PET manufacturers – 3.5 million mt installed capacity in EU - 3 bn € turnover
- **EuPC:** represents 46 National and European associations - 50'000 companies – 500mn tons - 260 bn €
- **Forum PET Europe:** represents the PET bottle associations in France (Elipso) and Germany (IK)
- **PRE: Plastics Recyclers in Europe:** 500 companies – 6,6mt installed capacity - 3 bn € turnover
- **FINAT:** European association for the self-adhesive label industry.
- **AMAPLAST:** Italian plastics and rubber processing machinery and moulds manufacturers' Association
- **RECOUP:** Registered charity and not-for-profit organization to promote, develop, stimulate and increase the levels of plastics recycling within the UK
- **BOPET Films Europe:** the association representing BOPET film producers in the European market
- **UNESDA:** Brussels based association representing global & national soft drinks associations

Membership in 2023 (MAP)

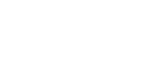
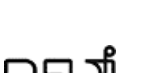
Country	Companies
Austria	6
Belgium	9
Brazil	1
Canada	1
Croatia	1
Cyprus	1
Denmark	1
Finland	1
France	13
Germany	27
Greece	2
India	1
Ireland	1
Israel	1
Italy	25
Latvia	1
Lithuania	2



Country	Companies
Netherlands	14
Poland	2
Portugal	2
Romania	1
Russia	2
South Korea	1
Spain	14
Sweden	2
Switzerland	7
Türkiye Cumhuriyeti	3
UK	11
US	2
Unknown	2



Petcore Europe: the whole EU PET Value Chain





United Nations Environment Programme (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.

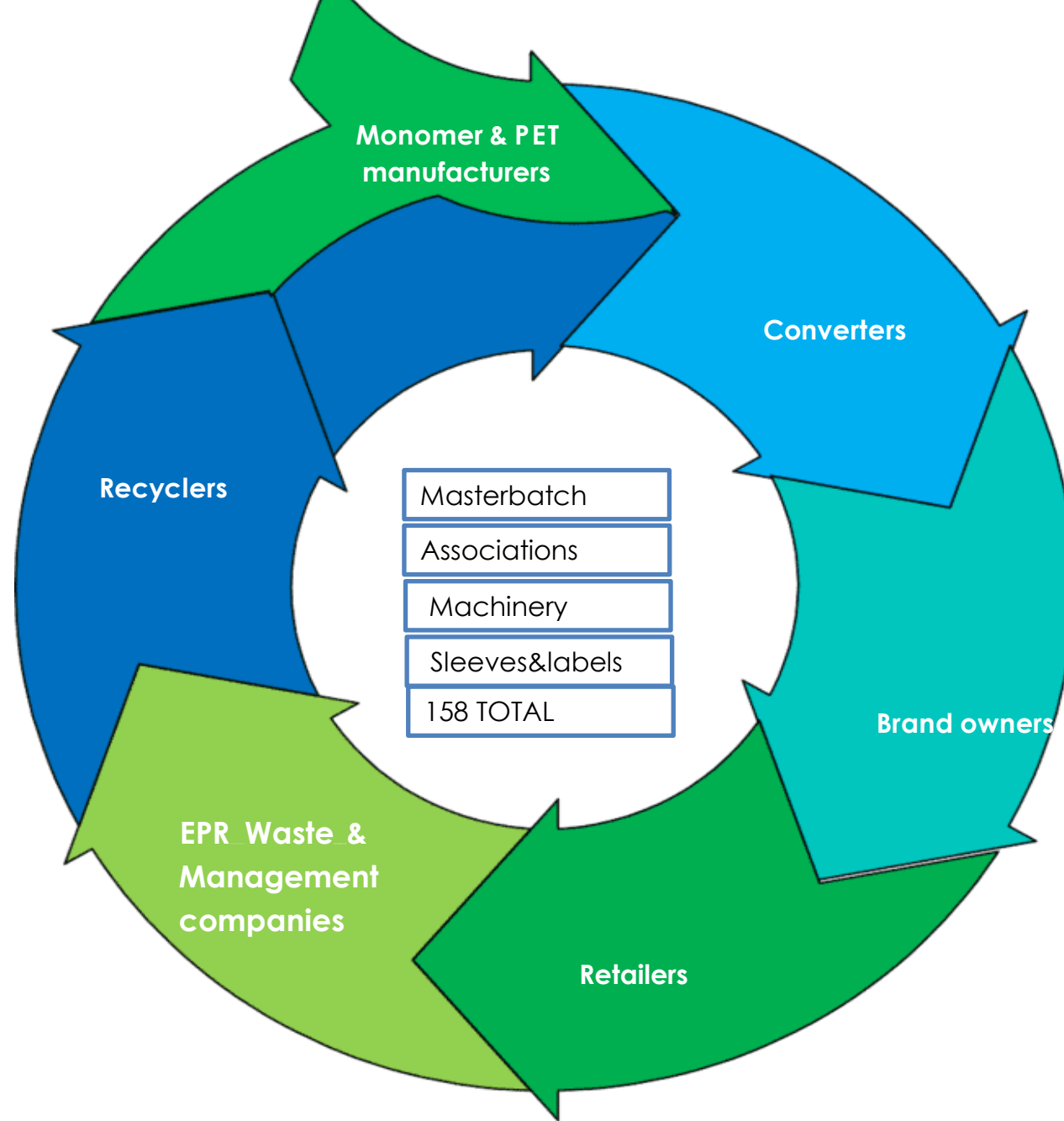
- promotes the coherent implementation of the environmental dimension of sustainable development within the UN system
- serves as an authoritative advocate for the global environment.
- works on delivering transformational change related to the three planetary crises of climate change: nature and biodiversity loss, pollution and waste.
- Through cutting-edge science, coordination and advocacy, UNEP supports its 193 Member States to achieve the **Sustainable Development Goals** and live in harmony with nature.



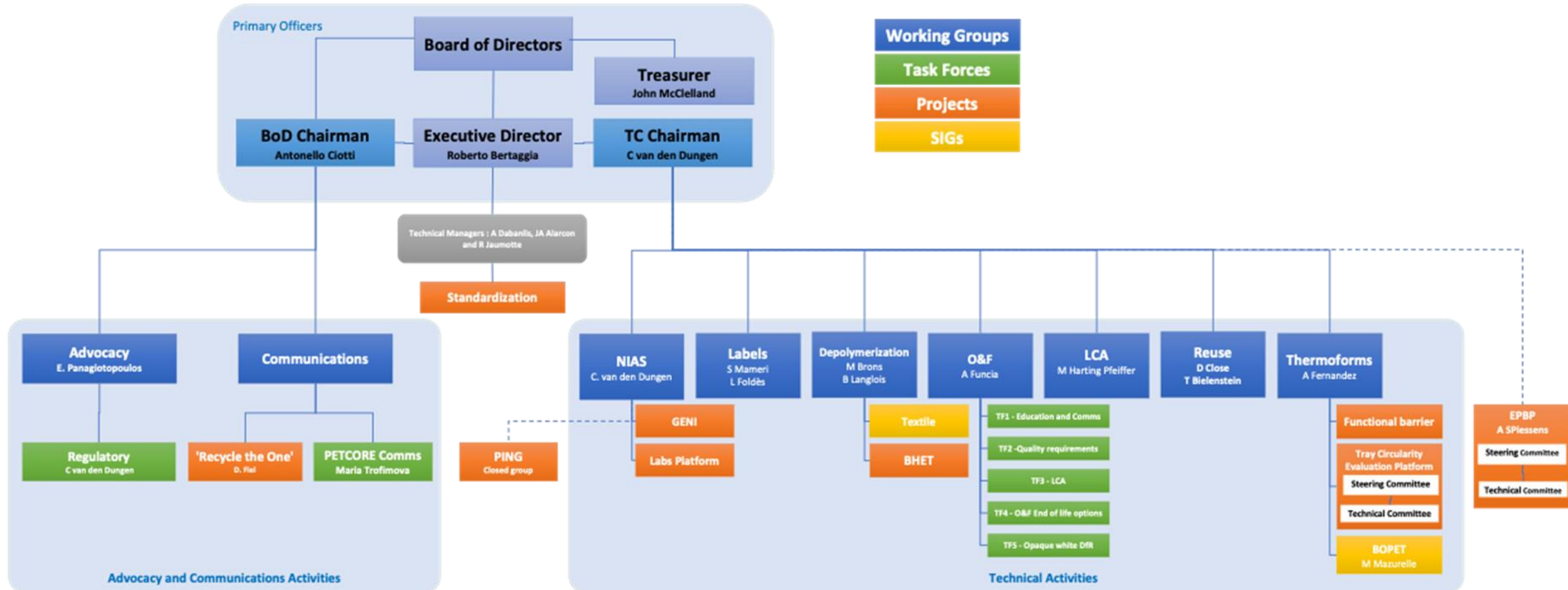
United Nations Environment Programme (UNEP)



- 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).



Petcore Organisation



Bi-annual survey on: PET collection & recycling rates in Europe

PET MARKET IN EUROPE STATE OF PLAY: PRODUCTION, COLLECTION & RECYCLING DATA 2022



EUROPEAN PET RECYCLING CAPACITY, INPUT AND OUTPUT, 2020 AND 2022

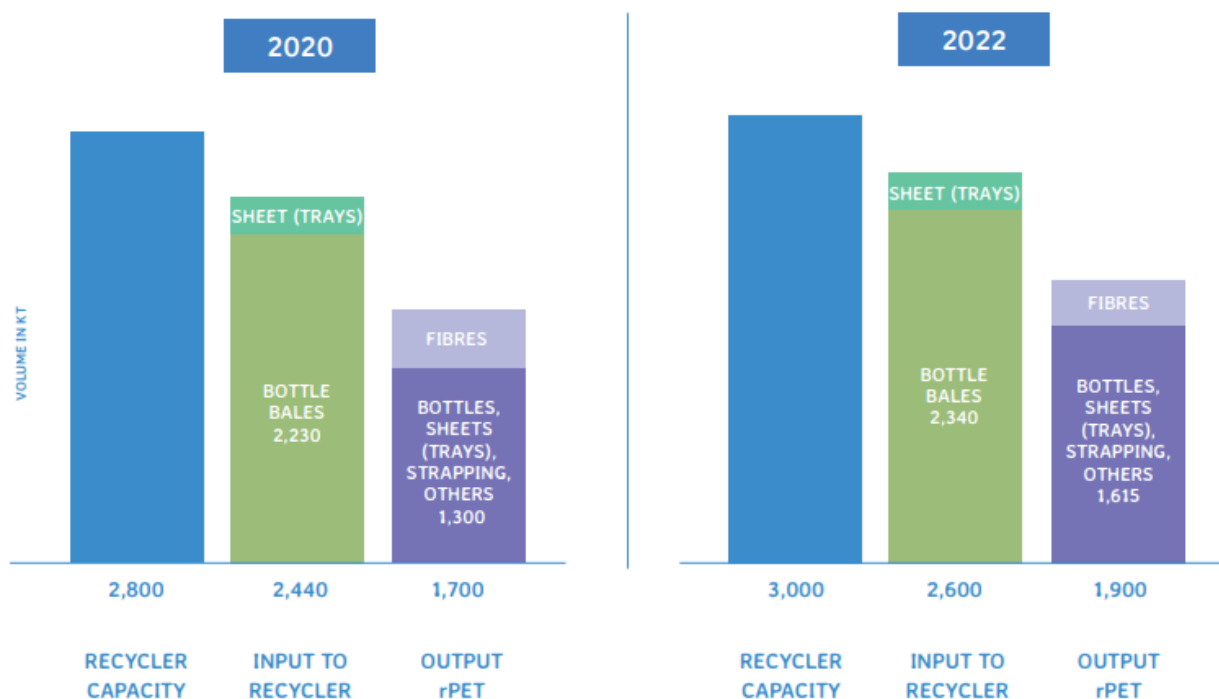


Figure 18: EU27+3 PET recycling capacity, input and output in '000 tonnes, in 2020 and 2022.

Source: PRE Survey and secondary research.

PET MARKET IN EUROPE STATE OF PLAY: PRODUCTION, COLLECTION & RECYCLING DATA 2022



2022 was an unprecedented year for the PET and rPET value chains, as shown in the latest report. Despite extreme uncertainty, figures show advancement in the market.

However, the disparities in the collection, sorting and recycling of PET around Europe will need to be addressed to achieve the EU recycling targets in the mid and long-term. PET collection and recycling accelerated in 2022 ahead of the new EU Single-Use Plastic Directive targets.

The collection rate of PET in 2022 was 60%, showing an increase from the 45% achieved in 2020. Furthermore, the sorted for recycling rate for PET beverage bottles alone was estimated to be 75%, compared to 61% in 2020.

The full report is available here: [PET Market in Europe: State of Play | petcore-europe.org](https://petcore-europe.org)





Petcore Europe

Working Groups & Task Forces

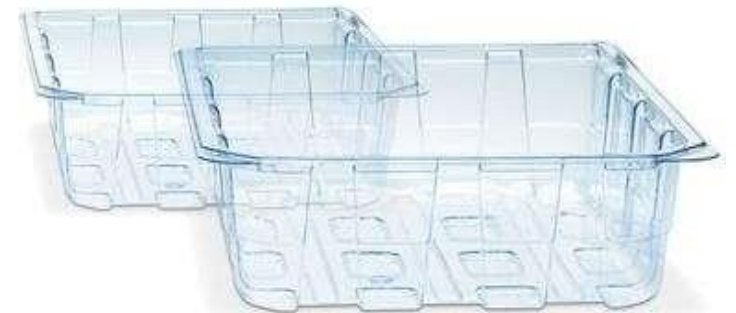


Petcore Europe Working Groups



Trays Circularity Evaluation Platform (TCEP)

- Established in 2021
- The mission of the platform is to give support to the value chain of thermoformed PET trays to improve recyclability of thermoforms and strive to circularity.
- The Platform consists of technical experts in the field of PET thermoforms design, production and recycling.
- The objective is the evaluation of the impact on the PET recycling processes across Europe, of existing technologies and/or innovative solutions to provide an independent and confidential assessment, based on Petcore own protocols.





Petcore Europe Working Groups



Recycling PET Thermoforms

- Established in 2015
- 74 companies and organisations from the whole value chain.

Deliverables

- To improve design for recycling, collection and sorting across EU
- Provide members with professional support and monitoring of the incoming legislation.

Most recent activities

- Event in Bologna in June 2023 on PET thermforms recycling and the possibility to visit collection and sorting scheme for PET thermoforms





Petcore Europe Working Groups

Recycling of Opaque and 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:

1. Continue update of DfR guidelines for Opaque white PET: definition of white opaque for recyclers/sorting machines and maximum amount of opacifiers to ensure circularity of PET white bottles in multiple loops
2. End of life proposal for colored PET bottles, including DfR guidelines review and preferred (most valuable) outlet: non white opaques, non clear, non light blue, colored transparent and opaques
3. Webinar on Sorting of today and future technologies in Europe.
4. Database of white opaque PET recyclers and outlet to connect value chain players and promote recycling of white PET opaques.

Most recent achievements and 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.
- Design for recycling for opaque white PET bottles.





Petcore Europe Working Groups

Labels working group



- Created 2021 - 31 companies

Deliverables:

- propose recommendations and best practices to brand owners, green dot associations, sorting centers and recyclers.
- Pressure sensitive labels and crystallizable labels
- Supporting circularity and food safety.



Most recent achievements and upcoming activities

- Recommendations on components for labels, shared activity with Finat/Eupia
- Revise preferred behaviour of adhesives.
- Work with EPBP to revise testing protocols on adhesives behaviours.

Petcore Europe Working Groups



PET Industry NIAS Group (PING)



Deliverables

- PING drives compliance with EC Regulation N°10/2011 and subsequent amendments on plastics materials and articles in contact with food, re. NIAS.
- The group evaluates NIAS test methods, risk assessment and produce an industry wide accepted process.
- Any identified unacceptable risk will be addressed, and PING will work to find solutions to reduce or remove the risk.



Most recent achievements and upcoming activities

- Standardized measurement techniques procedures for NIAS in PET
- Development of a digitalized platform to help the PET value chain produce quality NIAS data and allow aggregation of the data to improve the whole knowledge and control of NIAS in the value chain.





Petcore Europe Working Groups

PET Depolymerisation



- Started in 2019 -15 members

Deliverables:

- Broaden PET recycling possibilities tapping into non-circular waste feedstock:
 - Depolymerization of colored bottles and food-trays as well as multimaterial packaging constructions, non-food grade feedstock back to virgin state
 - Rejects and degraded material from mechanical recycling to go back to virgin state.
 - Textile.
- The group is working on regulatory issues (PPWD, SUP) and chain of custodies to increase recycling content in PET and increase polyester circularity for both packaging and textile application.

Most recent achievements and current activities

- Revised PET depolymerization position paper 2023.
- Support novel technology filing to the EU commission.





Petcore Europe Working Groups



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.

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



Petcore Europe Working Groups

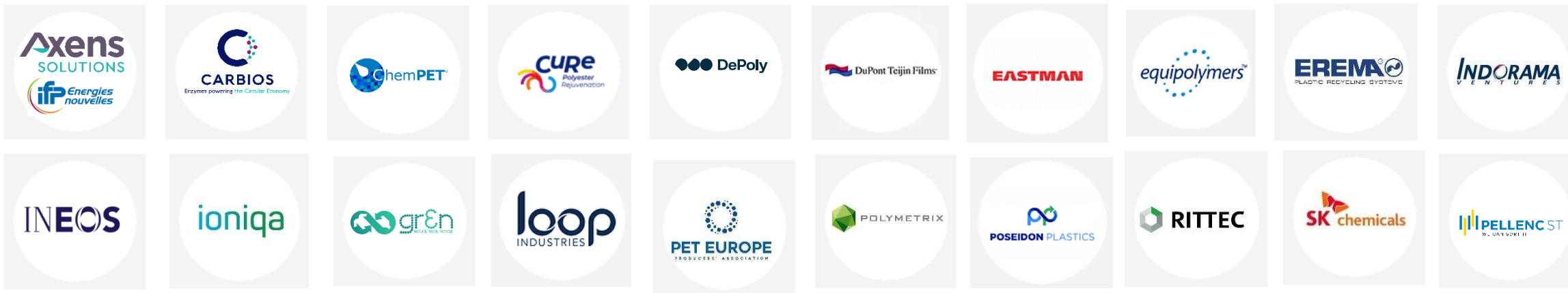
Textiles SIG



- **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 having met :**
 - EU Commission: DG ENVI, DG GROW and JRC
 - EU associations such as Euratex , CIRFS, the French EPR , Re-Fashion and others...
 - Sorting machines manufacturers and textiles sorting plants.
- PETCORE proposed guidelines will be elaborated by the SIG and definitely welcomed for discussions by the EU Commission.

Textiles

Members of the Textiles SIG



Mission and deliverables of the working group:

- Established in 2023
- Follow up on regulatory developments
- Communicate to Petcore Members developments related to regulatory developments (webinars twice per year)
- Identify key stakeholders in the area of legislative developments and establish ongoing communications with them.
- Identify the list of topics on which Petcore has to have a position (pro/con/neutral position) and define if this should be a public position or not.
- Be connected to the Technical WG's to identify/validate the key topics and ask them to develop the related argumentation for the position.
- Set up individual meeting with the above-mentioned stakeholders. The scope of these meeting is to better understand the proposed regulatory developments and provide the position of the PET value chain;
- Identify activities/forums where regulatory stakeholders present their latest developments and where we can speak on behalf of the PET value chain

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.

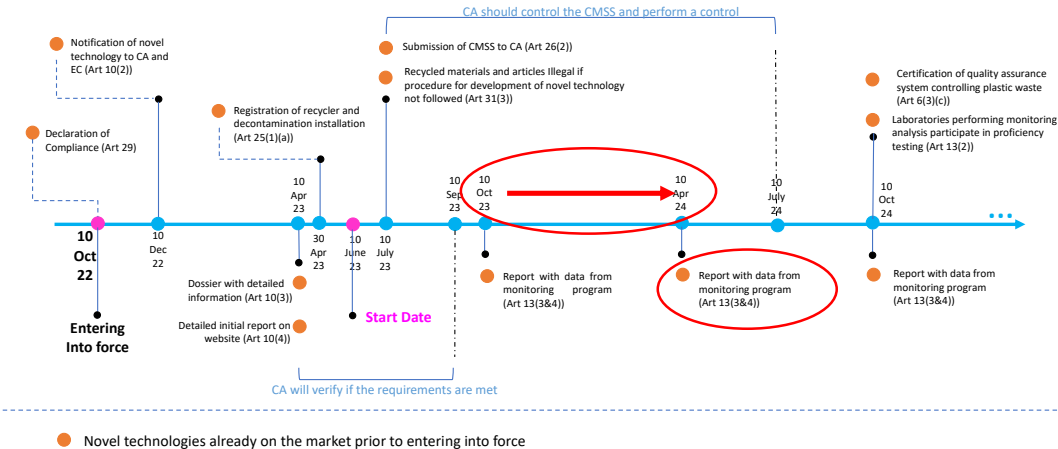
Deliverables

- Provide Technical documentation and dossiers to support food safety of the use of rPET behind a functional barrier
- Deploy a monitoring program to comply with the regulation
- Maintain continuous dialogue with members and authorities

Most recent activities

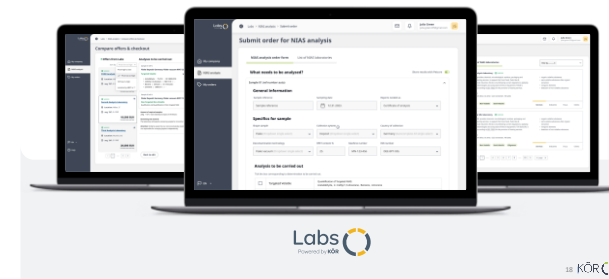
- Main dossier presented on time on April 10th.
- First monitoring Report delivered on time on October 10th.
- Regular General follow up assemblies
- Monitoring Protocols and procedures In place.
- Sampling plan developed together with the KÖR labs platform

Operation of recycling installations that already manufactured recycled plastic M&A before 10 October 2022 and that operate under the novel technology route according to regulation (EU) No 2022/1616






CMSS = Compliance Monitoring Summary Sheet
CA = Competent Authority

Labs: Your testing platform.



Recyclability Evaluation Platforms

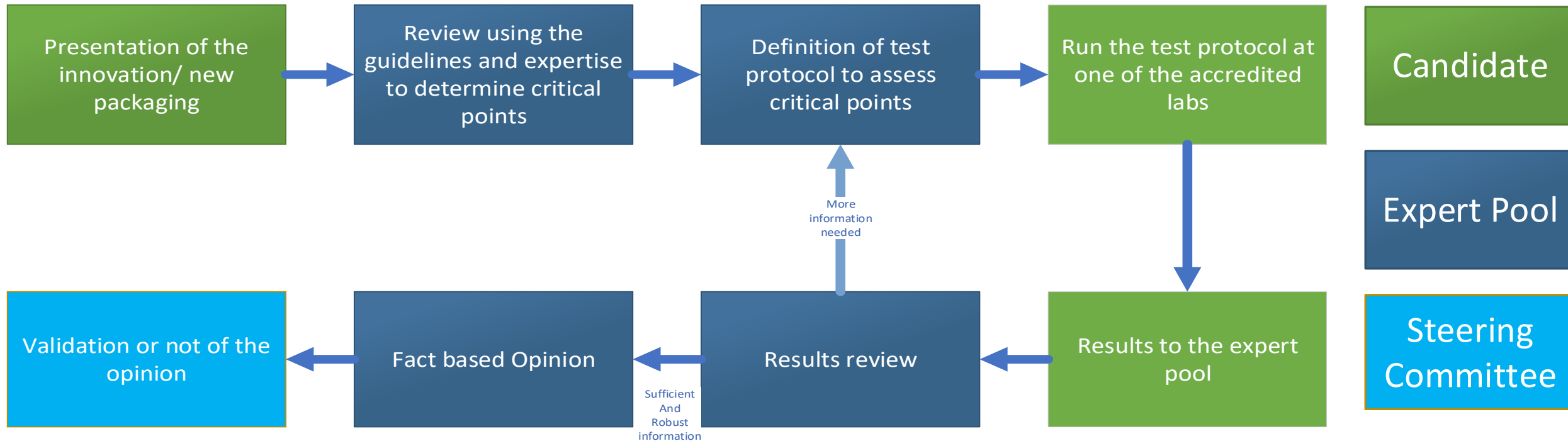
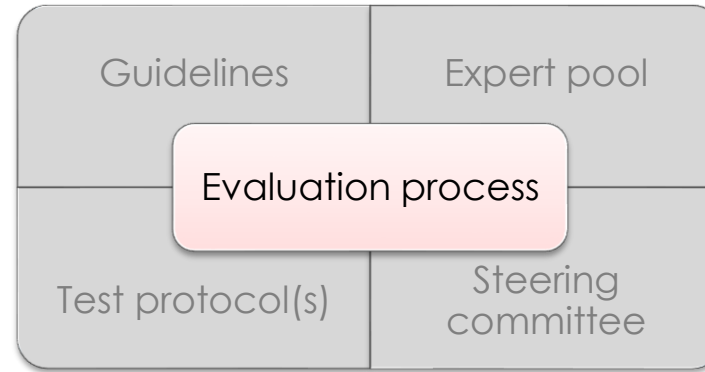
→ **European PET Bottle Platform (EPBP)** - since 2008 - European harmonized guidelines and protocol for PET bottles recyclability accepted across the value chain Encouraging industry to test new PET bottle concepts and/or material before market launch

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 OR
		



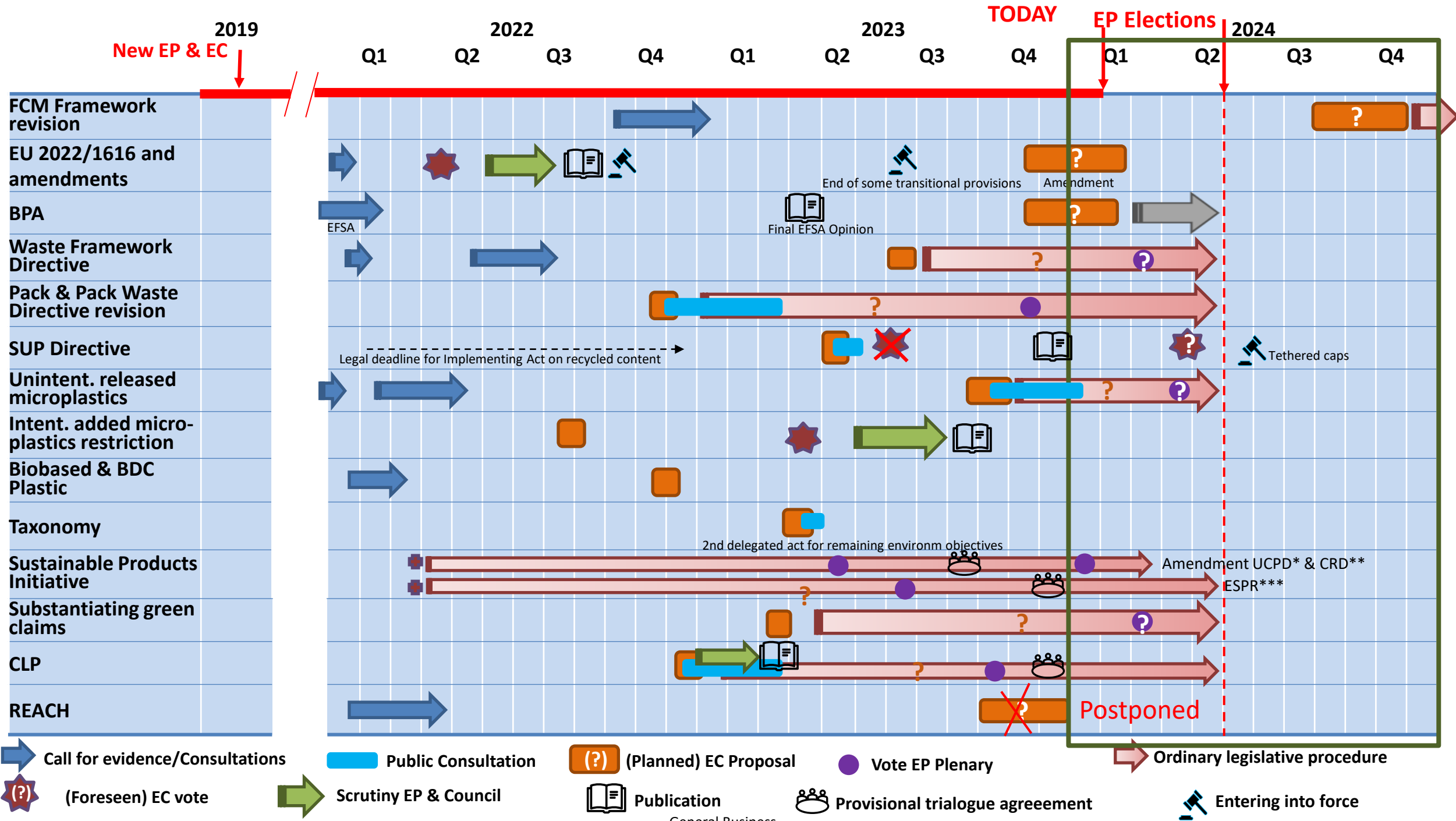
→ **Trays Circularity evaluation platform (TCEP)** - Since 2021 European harmonised guidelines and protocol for PET trays recyclability – Same mindset than the successful EPBP.

Evaluation process





Regulatory and Scientific Affairs



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



CPA and PETCORE Europe's pledge



Circular Plastics Alliance



- Signed on **20/09/2019** at the European Commission, Petcore Europe among 100 + organizations committed to the CPA's vision for more recycled plastics in Europe.
- By **2025, 10 million tonnes of recycled plastics** must find their way into products in the EU.

PETCORE EUROPE Commitment to the EU Commission:

- ✓ Focus on the overall objective: 100% recycling of collected PET packaging material.
- ✓ Ongoing commitment to improve Circular Economy by influencing all stakeholders
- ✓ Develop and update Design for Recycling guidelines.
- ✓ Cooperate in finding innovative solutions & remove obstacles for the usage of standard recycled qualities.
- ✓ Cooperate to develop a positive contribution outside Europe using the established best practices in the value chain.



Petcore Europe Events: Workshops & Annual Petcore Europe Conference





PETCORE EUROPE's Annual Conference 2023



- A key event at the European level dedicated to innovation and sustainability in the PET packaging industry, “**PET value chain in a fast-paced environment for CIRCULARITY**“ took place on Feb 1/2 2023.
- The Annual Conference 2023 was dedicated to PET recycling and circularity, and the PET industry's contribution to the EU's carbon neutrality goals.
- Petcore Europe celebrated **30 years anniversary** by taking time to list the milestones we have achieved, recognize our members for their hard work and commitment, thank loyal partners & sponsors.



PETCORE EUROPE's Annual Conference 2023

In TOTAL 54 Speakers & Moderators
In TOTAL: 243 Attendees



Alexandre Paquot
European Commission

[READ MORE »](#)

- Hybrid event for those who could not attend in person
- GALA Dinner on the 1st February at Le Plaza Hotel
- 9 Gold & Silver Sponsors
- 8 Media Partners
- New dedicated website: www.petcoreeuropeannualconference.org

2 EC Speakers - Alexandre Paquot (Director for Innovation for a Low Carbon, Resilient Economy at DG CLIMA, European Commission) and Wolfgang Trunk (policy officer at the European Commission)



Wolfgang Trunk
European Commission

[READ MORE »](#)



Driven by expertise





Depolymerisation Webinar 2023 in figures



The objective of this online webinar was to highlight PET Depolymerisation recycling as a viable addition to the established mechanical recycling process, enhancing the circularity of PET & to discuss the current challenges of the industry.

Attendance: 105 registrants

Speakers: 18 key-speakers

Representatives from the EU - Marianne Seng (marianne.seng@ec.europa.eu) & Marlene BARTES (DG GROW) (marlene.bartes@ec.europa.eu)

Media Partners:

Name	Company
Adel Essaddam	Loop Industries
Andreas Christel	Polymetrix
Anne-Flore Jacob	Danone
Anwar Majal	Gr3n-recycling
Argiris Dabanlis	Petcore-europe
Asier Asueta	Gaiker
Bardiya Valizadeh	Depoly
C Zschernitz	Bokela
Bruno Langlois	Carbios
Carmen Villano	Replanetmagazine
Caroline Braibant	Ikigai-consult
Carsten Eichert	Rittec
Cecilia Mattsson	RISE Research Institutes





“2023 Thermoforming: a path to circularity” 14-15th of June, physical event in Italy.



- **Petcore Europe Thermoforms WG** was launched in June 2015, followed by online workshops on **Recycling PET Thermoforms** in March 2015 and in December 2021.
- Thermoforms WG comprises around 50 companies and organisations including key players from industry and waste management companies.
- **Thermoforms Conference 2023** was held on the **14 & 15 June in Italy** aiming to promote thermoforms collection & recycling and specifically tray to tray recycling.
- On the first day Petcore Europe presented over 15 topics from the entire value chain.
- On the second day attendees could participate in TWO Plant visits: **Recycling Hera Group Plant** & **I.BLU** waste & collection sorting plant, dedicated to trays, showcasing Corepla's efforts to collect & sort thermoforms in Italy (both visits strictly for Petcore Europe members).



Annual Conference 2024 - updates



Petcore Europe Annual Conference 2024 will be held in Brussels on February 7-8th , as an in-person event, and will carry on with the success of the 2023 Conference that had an interactive format, based on the dialogue between panelists, PET industry experts and the audience.

The Annual Conference 2024 will explore the core challenges which the PET value chain has been facing over the past years: **market dynamics, Improvement of analytical methods, micro-plastics: update on newly developed analytical methods, recent and future regulatory EU issues and many other insightful topics.** We will be welcoming high-level speakers from the European Institutions, who will explain their expectations and goals for the PET value chain in line with the developments of the P&PWR.

The first day will feature high-level interventions from the institutions and business community touching on a wide range of issues. While the second day of the event, will focus on **Technical Interventions** from all Petcore Europe Working Groups.

They will feature a presentation by the WG Chair followed by an extensive Q&A session with experts from the PET industry & the audience, where participants will have the chance to pose questions and share their views in real time.

"Our conference is the only event in the year which gathers players from right across the PET value chain - from machine producers and PET recyclers through to brand owners. Petcore has now more than 150 members and brings together all the different industry players. As such it offers a unique perspective, and the conference provides an excellent opportunity to talk business and network with colleagues" - Antonello Ciotti, President at Petcore Europe.



Annual Conference 2024 - updates



- **Sponsors Package**

The Petcore Europe Annual Conference 2024 will be 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.

- **Media Partnership**

As a media partner, your organisation's name and logo will be displayed on all our communications materials (including agendas, press releases and websites) as well as promoted on social media during the event. If you are interested to hear more about our media partnership package, please contact us on: maria.trofimova@petcore-europe.org.

- **Hotel Reservation**

Should you need to stay overnight in Brussels, please be advised that we have negotiated a preferential rate at the conference venue, DoubleTree by Hilton, which is offering a special group rate, including breakfast, free cancellation – 72 hours prior to **your reservation**. Please be advised that the number of rooms is limited.

Stay updated and please check our [**dedicated website**](#) for more details.

Annual Conference 2024 in figures



Petcore Europe Annual Conference 2024

7 - 8 February 2024, physical event, Brussels



- **Speakers:** 30 key-speakers, including the representatives from the European Commission
- **Dedicated website:** www.petcoreeuropeannualconference.org
- **Sponsors:** 10 Sponsorships



- **9 Media Partners:** PET Planet, Argus Media, S&P Global, ECO PLASTICS in packaging, Plastech, MACPLAS, KI GROUP, ResourceWise, ChemOrbis.



Participation fees

- The participation fee is linked to the annual turnover of the candidate as per table below:

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	

- Petcore members can participate in the WG without any additional cost



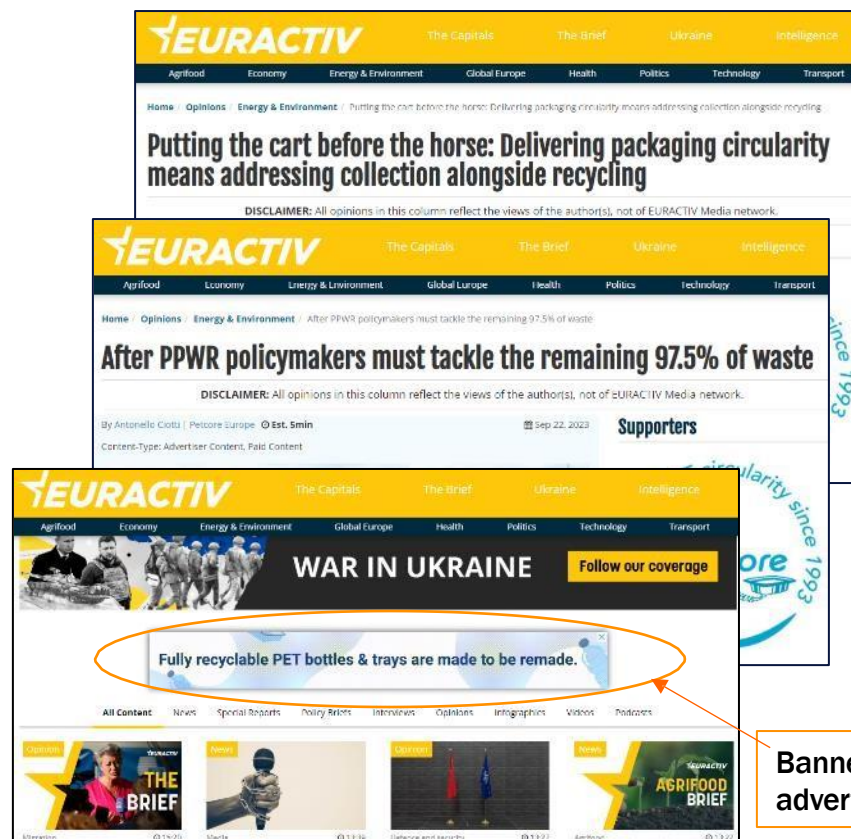
Recycling the One Campaign 2023 Achievements

EU POLICYMAKER FOCUS

Targeting policymakers on LinkedIn



Opinion Editorials and adverts in influential Brussels media outlet

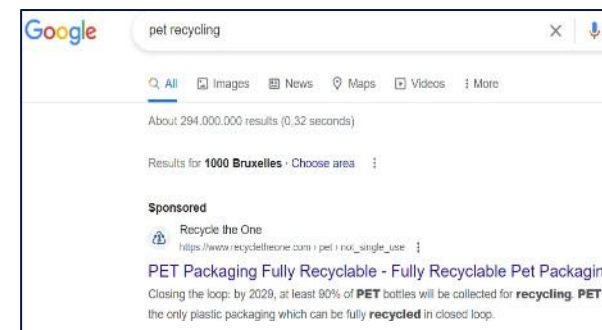


Banner adverts

Targeted Google Ads Brussels campaign



Ranking #1 in Brussels for PET recycling



306,000

Video Views
(Jan-Oct 2023)

12

Interactions with EU
Parliament &
Commission officials

5,000

Brussels website
visits
Q1-Q3 2023

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.



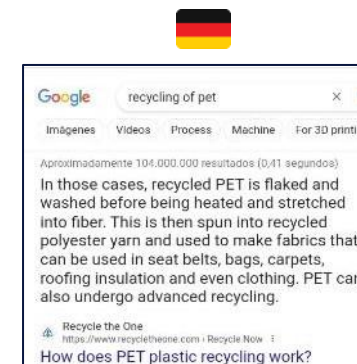
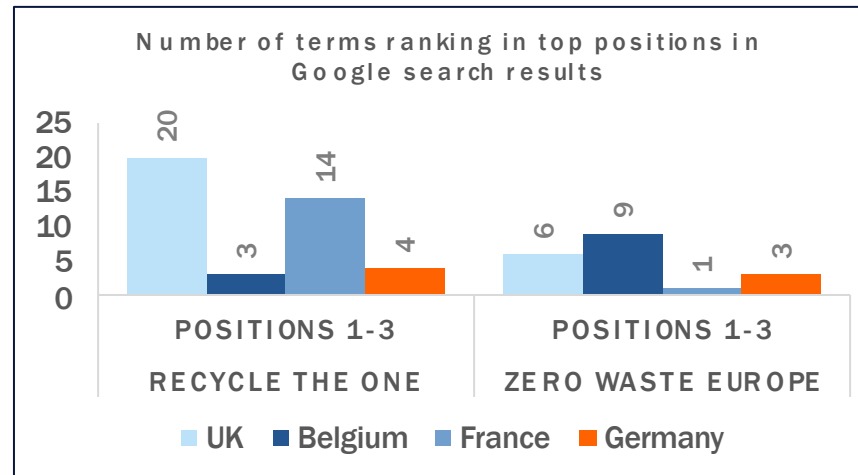
1,409,110

Video Views

Sep 1 - Oct 23 2023



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)



64,338

Website visits from ads

5,426,165

Imprecissions

CONSUMER FOCUS: TIKTOK (ENG & FR 2023 Results)

Top 3 Videos



19«k :icws



145k :icws



141k :icws

10,539
Video Likes

30
TikToks

Over 2.2
million
Views in 2023

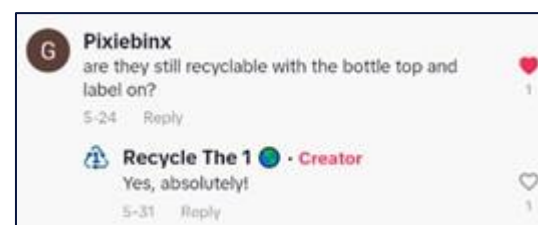


Example



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

Fostering an educational PET TikTok community



Moving the needle : exemplified by Zero Waste Europe



- Historically, Zero Waste Europe perceived the PET industry as an adversary, an entity to be eradicated. Our sector was labelled as 'waste' that required elimination. However, the narrative has significantly shifted. The industry is now recognised as one that necessitates careful modification rather than outright dismissal. The focus has narrowed to specific components such as bottle caps and labels, as well as addressing the issue of low collection rates.
- Direct criticism of PET as a material has substantially diminished. The aspiration for bottle-to-bottle circularity, achieving a state of 100% recyclability, has transcended the realm of fantasy and is now a tangible goal. This is evidenced by the recent publication of the 'Green Claims on PET Beverage Bottles in Europe' report. The report, also produced by ZWE, ClientEarth and others,
- admits that PET is recycled *“in practice and at scale”*. Additionally, there is a palpable sense of optimism regarding the trajectory of recycling rates across Europe.
- In summary, these developments undoubtedly serve as an affirmation of our efforts. With incoming regulation on green claims, it is imperative that we do not overstate our industry's environmental credentials. But it is also crucial that we continue to differentiate PET from other plastics, showcase our commitment to responsible practices, and fervently advocate for enhanced recycling initiatives.



**JOIN us in making the voice of the
PET Value chain louder!**



Petcore Europe

Avenue de Broqueville 12, 1150 Brussels, Belgium

Tel.: +32 (0) 2 315 24 88

Email: management@petcore-europe.org

Website: www.petcore-europe.org

Dedicated Website - Annual Conference 2024:
www.petcoreeuropeannualconference.eu

Communications Campaign Website:
<https://www.recycletheone.com/en>

Follow us on social media to stay updated:

