THE NEW PLASTICS ECONOMY GLOBAL COMMITMENT
2019 PROGRESS REPORT

UN environment programme

ELLEN MACARTHUR FOUNDATION

NEW PLASTICS ECONOMY

Global Commitment

SUMMARY

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Detergents and Maintenance Products • actiam • Adrian
Dominican Sisters, Portfolio Advisory Board • AECOC • Afeka Institute of
Circular Engineering and Economy • AGMPM (Association of the Greek Manufacturers of
Packaging & Materials) • Ahold Delhaize • ALBEA • Algramo • ALPLA Werke Alwin Lehner GmbH &
Co KG • Althelia Sustainable Ocean Fund • Amcor • American Licorice Company • ANIPAC • APK AG • APLM
- Portuguese Marine Litter Association • AptarGroup Inc. • Aquapak Polymers Limited • Arca Continental • Archemics
Ltd • Arup • As You Sow • Asia Pacific Waste Consultants (APWC) • Asociación Chilena para el Fomento de la Economía del
Bien Común - (EBC) • Asociación Nacional de la Industria Quimica A.C. (ANIQ) • Associação para as Ciências do Mar - APCM •
Atalay Atasu • Avespa • Bangor University • Barilla G. & R. Fratelli SpA • Baum und Pferdgarten • Bell Holding • Bella+Frank • Berkeley
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Gulbenkian Foundation • CAPTURE • CarbonLITE Recycling • Carrefour • CBPAK Tecnologia S/A • Cedo • CEFLEX • CEMPRE Colombia - Compromiso Empresarial
para el Reciclaje • China Plastic Recycling Association of China Resource Recycling Association • China Plastics Reuse and Recycling Association • Circular Economy
Initiative at KTH Royal Institute of Technology (CE@KTH) • Circular Economy Innovation Centre - USP • CIRCULAR ECONOMY JAPAN • Circular Economy Leadership
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Change Brasil • Faculty of Management, Law and Social Sciences, University of Bradford • Ferrero • Fifth Season Ventures •
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Indonesian Waste Platform • Indorama Ventures Public Company Limited • Industria Mexicana de Reciclaje S.A. de C.V. • ING • INGRUP • innocent
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Keurig Dr Pepper • Kiara S. Winans • Kiduara • Kingfa Sci. & Tech. Co., Ltd. • Kmart Australia Limited • Koepala Packaging Ltd. • L'Oréal • L'OCCITANE en Provence • Legal &
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The wave consists of all signatories of the Global Commitment as of 11th October 2019

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FOREWORD

People around the world are coming together to demand change in the way we make and use plastics. Millions of dollars are being invested in cleaning up our oceans, rivers and beaches in an effort to turn the tide on plastic pollution. These efforts are vital, but will be for nothing if ever more plastic continues to be allowed to escape into our environment — or indeed be landfilled or burned. We need to tackle the issue at source, and this is what the Global Commitment aims to do.

Launched in October 2018 by the Ellen MacArthur Foundation in collaboration with the UN Environment Programme, the Global Commitment unites businesses, governments, and other organisations from around the world behind a common vision of a circular economy for plastics, in which plastics never become waste. The signatory group now exceeds 400 organisations. They are working to: eliminate the plastic items we don't need; innovate so all plastics we do need are designed to be safely reused, recycled, or composted; and circulate everything we use to keep it in the economy and out of the environment. All business and government signatories have set concrete, public 2025 targets towards this vision, and we applaud them for their leadership.

One year on from the Global Commitment's launch, we are pleased to present this progress report. It is the first in a series of annual reports in which we aim to assess progress across the signatory group as a whole, highlight leading examples that can serve as inspiration for others, and disclose the progress of individual companies and governments towards a circular economy for plastics.

The 2019 report shows promising progress on two fronts. First, many business and government signatories are laying the foundations to scale and accelerate action and have made initial progress against their targets — ranging from concrete plans to eliminate problematic packaging items, to 43 businesses reporting active reuse pilots, changes in packaging design to increase recyclability and initial progress towards ambitious recycled content targets. Second, the report establishes, for the first time, a quantitative baseline that can be used to measure such progress across a significant group of businesses over the period to 2025. These are important steps forward.

To reach the 2025 targets, continued scaling of action and a further increase in the ambition level will be needed. In particular, this applies to efforts going beyond recycling, such as elimination and reuse. This will need to happen in the short term, as major investments, innovations, and transformation programmes must start now in order to have an impact by 2025.

To make the vision of a circular economy for plastic a reality, the Ellen MacArthur Foundation and UN Environment Programme call on all businesses that make or use plastics, and all governments across the world, to sign up to the Global Commitment and join the effort to create a circular economy for plastic.

The question is not whether a world without plastic pollution is possible, but what we will do together to make it happen.

Andrew Morlet
CEO, Ellen MacArthur Foundation

Inger Andersen
Executive Director, UN Environment Programme

DISCLAIMER

This report has been compiled by the Ellen MacArthur Foundation, with input from the UN Environment Programme in relation to the government signatories. Part 1 has been written and compiled by the Ellen MacArthur Foundation, with input from the UN Environment Programme. The content of the individual signatory progress reports in Part 2 has been provided by the respective signatories.

The information relating to each signatory's progress, reporting and company information has been submitted by that signatory to the Ellen MacArthur Foundation and/or the UN Environment Programme, and has not been audited or verified by the Ellen MacArthur Foundation nor the UN Environment Programme. Signatories are responsible for all submitted data, which has been inserted verbatim in reporting templates in Part 2 of this report. The information provided in this report is made available on an 'as is' basis and no warranty is given as to its quality, accuracy, completeness or fitness for purpose. The Ellen MacArthur Foundation is not liable for any errors or inaccurate information whether in contract, tort (including negligence), breach of statutory duty, or otherwise arising in connection with the content or use of this report.

Where a signatory has not provided its commitment information within the timeframes requested by the Ellen MacArthur Foundation and/or the UN Environment Programme, its Individual Commitment page is not included. This version of the 2019 Progress Report was completed on October 18 2019. Business and government signatories that joined before the start of the reporting process on June 1, 2019 have been asked to report on progress, companies and governments that joined later will be asked to report on progress for the first time in 2020.

If you are a signatory and you believe there has been an error in the reproduction of the information provided to us by your organisation, please contact us as soon as possible at reportingGC@ellenmacarthurfoundation.org, or your contact at the UN Environment Programme, so that we can update our records.

CONTENTS

GLOSSARY OF TERMS

More information on all definitions used as part of commitments made by signatories can be found here.

GENERAL TERMS

The New Plastics Economy

A global initiative with the ambition to set the economy on an irreversible path towards a world where plastics never become waste, starting with packaging. Led by the Ellen MacArthur Foundation, it applies the principles of the circular economy and brings together key stakeholders to rethink and redesign the future of plastics. More information can be found here.

The common vision

The vision of a circular economy for plastics, where plastic never becomes waste, endorsed by all 400+ signatories of the New Plastics Economy Global Commitment. It can be read in full on page 8 of this document.

Signatory

An organisation (business, government, NGO, academic institution or other organisation) or relevant individual (for example, academics in relevant fields) that has signed the Global Commitment. More information on the signatory group is provided in Section 2, and a full list of current signatories can be found in the appendix of this document.

Plastics Pact

A network of initiatives around the world that bring together all key stakeholders at the national or regional level to implement solutions towards a circular economy for plastics. Each initiative is led by a local organisation and unites governments, businesses, and citizens behind the common vision with a concrete set of ambitious local targets. More information can be found here.

TYPES OF PLASTIC CONTENT

Virgin plastic

Plastics that have not been previously used or subjected to processing other than for their original production. In other words, plastic that is not produced from post-consumer (see next definition) or pre-consumer recycled material.

Post-consumer recycled content

Proportion, by mass, of post-consumer recycled material in a product or packaging. Post-consumer material is that generated by households or by commercial, industrial and institutional facilities in their role as end users of the product, where that material can no longer be used for its intended purpose. This includes returns of material from the distribution chain, but it excludes pre-consumer material (e.g. production scrap), as defined by ISO 14021.

Renewable content

Proportion, by mass, of renewable material in a product or packaging. Renewable material is that composed of biomass from a living source and that can be continually replenished. When claims of renewability are made for virgin materials, those materials shall come from sources that are replenished at a rate equal to or greater than the rate of depletion, as defined by ISO 14021.

ASSESSMENT OF PLASTIC PACKAGING IN THE GLOBAL COMMITMENT

Problematic and unnecessary plastic packaging

The following list of criteria is provided to signatories to help identify problematic or unnecessary plastic packaging or plastic packaging components:

1. It is not reusable, recyclable or compostable (as per the definitions below).
2. It contains, or its manufacturing requires, hazardous chemicals that pose a significant risk to human health or the environment (applying the precautionary principle).
3. It can be avoided (or replaced by a reuse model) while maintaining utility.
4. It hinders or disrupts the recyclability or compostability of other items.
5. It has a high likelihood of being littered or ending up in the natural environment.

Reusable packaging

Packaging which has been designed to accomplish or proves its ability to accomplish a minimum number of trips or rotations in a system for reuse. A system for reuse defined as established arrangements (organisational, technical or financial) which ensure the possibility of reuse, in closed-loop, open-loop or in a hybrid system, as defined in ISO 18603:2013.

A framework to understand reuse models, and 69 examples of reuse in action can be found in the Ellen MacArthur Foundation's REUSE book.

Recyclable packaging

Packaging or a packaging component is recyclable if its successful post-consumer collection, sorting, and recycling is proven to work in practice and at scale. The threshold suggested to prove recycling works 'in practice and at scale' is a 30% post-consumer recycling rate achieved across multiple regions, collectively representing at least 400 million inhabitants. More information on the assessment of recyclability under the Global Commitment is provided in Section 3.3.

Compostable packaging

Packaging or a packaging component is compostable if it is in compliance with relevant international compostability standards and if its successful post-consumer collection, sorting, and composting is proven to work in practice and at scale. The threshold suggested to prove composting works 'in practice and at scale' is a 30% composting rate achieved across multiple regions, collectively representing at least 400 million inhabitants. More information on assessment of compostability under the Global Commitment is provided in Section 3.3.

OTHER TERMS

Deposit return schemes

Used to encourage consumers to return packaging for reuse or recycling through provision of a financial incentive. The schemes involve the cost of a deposit being added to the price of products, with the deposit redeemable when consumers return the empty packaging to a designated return point.

Extended Producer Responsibility (EPR)

A policy approach under which producers are required to take a financial and/or physical responsibility for the treatment or disposal of products after their use by consumers.

Recycling (chemical or mechanical)

ISO 18604:2 defines material recycling as: "Reprocessing, by means of a manufacturing process, of a used packaging material into a product, a component incorporated into a product, or a secondary (recycled) raw material; excluding energy recovery and the use of the product as a fuel." This includes both mechanical (maintaining polymer structure) and chemical (breaking down polymer structure into more basic building blocks, for example via chemical or enzymatic processes, that are then built up again into new materials) recycling processes. It explicitly excludes technologies that do not reprocess materials back into materials but instead into fuels or energy.

THE NEW PLASTICS ECONOMY VISION

Signatories of the New Plastics Economy Global Commitment endorse the common vision of a circular economy for plastic, where plastic never becomes waste. They recognise it offers a root cause solution to plastic pollution with profound economic, environmental and societal benefits. Signatories recognise this vision is the target state we seek over time, acknowledge that it will require significant effort and investment; and recognise the importance of taking a full life-cycle and systems perspective, aiming for better economic and environmental outcomes overall. Above all, they recognise the time to act is now. For plastic packaging specifically, signatories recognise a circular economy is defined by six characteristics:

1 Elimination of problematic or unnecessary plastic packaging through redesign, innovation, and new delivery models is a priority

Plastics bring many benefits. At the same time, there are some problematic items on the market that need to be eliminated to achieve a circular economy, and, sometimes, plastic packaging can be avoided altogether while maintaining utility.

2 Reuse models are applied where relevant, reducing the need for single-use packaging

While improving recycling is crucial, we cannot recycle our way out of the plastics issues we currently face.

Wherever relevant, reuse business models should be explored as a preferred option, reducing the need for single-use plastic packaging.

3 All plastic packaging is 100% reusable, recyclable, or compostable by design

This requires a combination of redesign and innovation in business models, materials, packaging design, and reprocessing technologies.

Compostable plastic packaging is not a blanket solution, but rather one for specific, targeted applications.

4 All plastic packaging is reused, recycled or composted in practice

No plastics should end up in the environment. Landfill, incineration, and waste-to-energy are not part of the circular economy target state.

Businesses producing and/or selling packaging have a responsibility beyond the design and use of their packaging, which includes contributing towards it being collected and reused, recycled, or composted in practice.

Governments are essential in setting up effective collection infrastructure, facilitating the establishment of related self-sustaining funding mechanisms, and providing an enabling regulatory and policy landscape.

5 The use of plastic is fully decoupled from the consumption of finite resources

This decoupling should happen first and foremost through reducing the use of virgin plastics (by way of dematerialisation, reuse, and recycling).

Using recycled content is essential (where legally and technically possible) both to decouple from finite feedstocks and to stimulate demand for collection and recycling.

Over time, remaining virgin inputs (if any) should switch to renewable feedstocks where proven to be environmentally beneficial and to come from responsibly managed sources.

Over time, the production and recycling of plastics should be powered entirely by renewable energy.

6 All plastic packaging is free of hazardous chemicals, and the health, safety, and rights of all people involved are respected

The use of hazardous chemicals in packaging and its manufacturing and recycling processes should be eliminated.

It is essential to respect the health, safety, and rights of all people involved in all parts of the plastics system, and particularly to improve worker conditions in the informal (waste picker) sector.

ABOUT THE GLOBAL COMMITMENT

The New Plastics Economy Global Commitment unites businesses, governments and other organisations behind a common vision and ambitious targets to address plastic waste and pollution at its source, starting with packaging. It is led by the Ellen MacArthur Foundation in collaboration with the UN Environment Programme.

Launched in October 2018 with over 250 signatories, the Global Commitment now unites more than 400 organisations behind a common vision of a circular economy for plastics, in which plastics never become waste.

To help make this vision a reality, all business and government signatories of the Global Commitment are committing to ambitious 2025 targets. They will work to eliminate the plastic items we don't need; innovate so all plastics we do need are designed to be safely reused, recycled, or composted; and circulate everything we use to keep it in the economy and out of the environment.

Credibility and transparency are ensured by a clear minimum level of ambition for signatories, common definitions underpinning all commitments, publication of commitments online and annual reporting on progress. The minimum ambition level will be reviewed — and will become increasingly ambitious — in the coming years to ensure the Global Commitment continues to represent true leadership.

5 investors committing to invest **USD 200+ million**

19 national, sub-national and local level governments across five continents

200+ businesses across all stages of the plastic packaging value chain, representing more than **20%** of all plastic packaging used globally

200+ endorsing signatories including **27** financial institutions with a combined **USD 4 trillion** worth of assets under management; leading institutions such as **National Geographic**, **World Wide Fund for Nature (WWF)**, the **World Economic Forum**, the **Consumer Goods Forum**, and **International Union for Conservation of Nature (IUCN)**; and **50** academics, universities, and other educational or research organisations

More information on the signatory group can be found in Section 2 of this report.

ABOUT THIS REPORT

This document is the first in a series of annual Global Commitment progress reports. It sets a clear baseline for measuring progress by leading businesses and governments towards creating a circular economy for plastics.

In this report, for the first time 176 businesses across the global plastics value chain (93% of the business signatories eligible to report) and 14 governments across five continents (out of 16 government signatories eligible to report) have reported progress against public targets to help build a circular economy for plastics.[12] They all share a common set of commitments and use common definitions. This report therefore creates unprecedented transparency and consistency in data sharing on plastics across a significant group of businesses and governments.

This first progress report sets a quantitative baseline against which to measure progress over the period to 2025 and lays out initial actions signatories have taken to realise their commitments. Due to the timing of reporting cycles, most quantitative data provided by business signatories is for 2018. For an overview of the commitments made by the business and government signatories, please see here.

The report is divided into two parts - the first part provides a summary of progress across the signatory group and is divided into three sub-sections:

Section 1 provides a high-level summary of progress to date and the perspective of the Ellen MacArthur Foundation and the UN Environment Programme on where we are on the journey towards a circular economy for plastics. Section 2 provides an update on the signatory group. Section 3 provides insights into the collective progress of the signatory group to date and highlights examples that can serve as inspiration for others.

Part 2 of the report contains the individual progress reports of business and government signatories.

The six themes of elimination; reuse; reusable, recyclable or compostable by design and in practice; decoupling; and transparency below run through Part 1 of the report and provide the structure for the presentation of findings. The first five of these are drawn from the New Plastics Economy vision, the last is to highlight disclosure and transparency.

- **ELIMINATION OF PROBLEMATIC OR UNNECESSARY PLASTIC PACKAGING**
- **MOVING FROM SINGLE-USE TO REUSE MODELS**
- **100% REUSABLE, RECYCLABLE OR COMPOSTABLE BY DESIGN**
- **REUSE, RECYCLING OR COMPOSTING IN PRACTICE**
- **DECOUPLING FROM THE CONSUMPTION OF FINITE RESOURCES**
- **TRANSPARENCY**

PART 1: SUMMARY

A.I.S.E., International Association for Soaps, Detergents and Maintenance Products • actiam • Adrian Dominican Sisters, Portfolio Advisory Board • AECOC • Afeka Institute of Circular Engineering and Economy • AGMPM (Association of the Greek Manufacturers of Packaging & Materials) • Ahold Delhaize • ALBEA • Algramo • ALPLA Werke Alwin Lehner GmbH & Co KG • Althelia Sustainable Ocean Fund • Amcor • American Licorice Company • ANIPAC • APK AG • APLM - Portuguese Marine Litter Association • AptarGroup Inc. • Aquapak Polymers Limited • Arca Continental • Archemics Ltd • Arup • As You Sow • Asia Pacific Waste Consultants (APWC) • Asociación Chilena para el Fomento de la Economía del Bien Común - (EBC) • Asociación Nacional de la Industria Quimica A.C. (ANIQ) • Associação para as Ciências do Mar - APCM • Atalay Atasu • Avespa • Bangor University • Barilla G. & R. 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SECTION 1:
KEY FINDINGS

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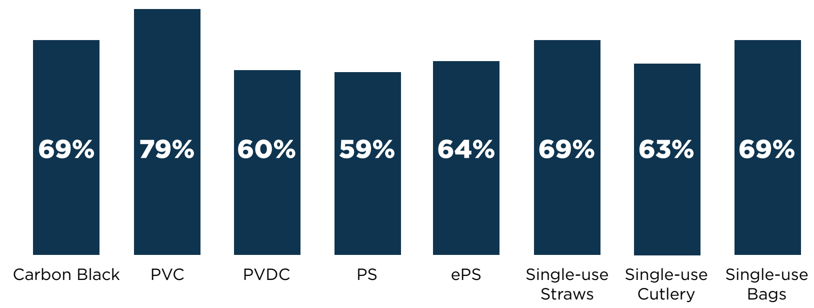
1.1 SUMMARY OF PROGRESS TO DATE

ELIMINATION OF PROBLEMATIC OR UNNECESSARY PLASTIC PACKAGING

Elimination of the most commonly identified problematic plastic packaging is happening at scale, driven by businesses and governments. Approximately 60% of brands, retailers and packaging producers in the signatory group that use, or have used, PS, ePS or PVDC, have eliminated or have concrete plans to phase out these materials from their portfolio. For single-use straws, carrier bags and undetectable carbon black plastics, this is approaching 70%, while for PVC the proportion is as high as 79%. The majority of government signatories (11 in total) are also implementing legal and/or fiscal measures to stimulate the phasing out of similar items including single-use bags, straws and ePS; half of those reporting are using bans to stimulate their elimination, with some providing financial incentives for innovation and research into alternatives. There remains large potential for businesses to make greater strides on elimination by moving beyond these commonly identified problematic items towards more fundamental innovation-led elimination.

Elimination rate for commonly identified problematic plastic packaging types

Signatories who have already or plan to eliminate these items as a % of those who have or had them in their portfolio

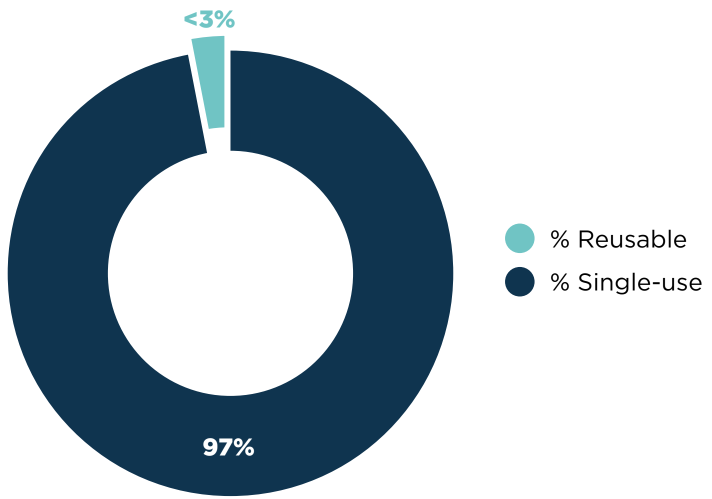


MOVING FROM SINGLE-USE TO REUSE MODELS

Over a third of relevant signatories have active reuse pilots. However, less than 3% of signatories' packaging is reusable today. 43 packaged goods companies, packaging producers and retailer signatories — 36% of the group — are currently engaged in testing and piloting reuse business models across different markets and product types. A few of them have reuse models in place at large scale. Government signatories are also attempting to accelerate the shift towards reuse, including through Extended Producer Responsibility legislation and public awareness campaigns. However, reuse models still represent a minor part of the total packaged goods market today. Only 13% of larger signatories reported having reuse models in place across a 'significant proportion' of their portfolio.[3] 36% reported that they are yet to start identifying reuse opportunities in their portfolio and less than 3% of the signatories' packaging by weight is reported to be reusable.

Share of reusable packaging in portfolio

Proportion of signatories' plastic packaging reusable (by weight)



43 signatories with active pilots of reuse models

100% REUSABLE, RECYCLABLE OR COMPOSTABLE BY DESIGN

Approximately 60% of signatories' plastic packaging is reusable, recyclable or compostable in practice and at scale today. The highest percentages (calculated by weight) are found with companies that have large shares of rigid plastic packaging, and particularly PET bottles, in their portfolios. These numbers are based on an assessment methodology that requires recycling and composting to be proven to work in practice and at scale, going beyond 'theoretical' reusability, recyclability and compostability.[4] As such, these percentages cannot be compared to past assessments. Instead, they provide a clear baseline against which to track progress towards the 2025 ambition level of 100% reusable, recyclable or compostable plastic packaging, to which all 139 packaged goods producers, packaging producers, retailers, and hospitality signatories have committed.

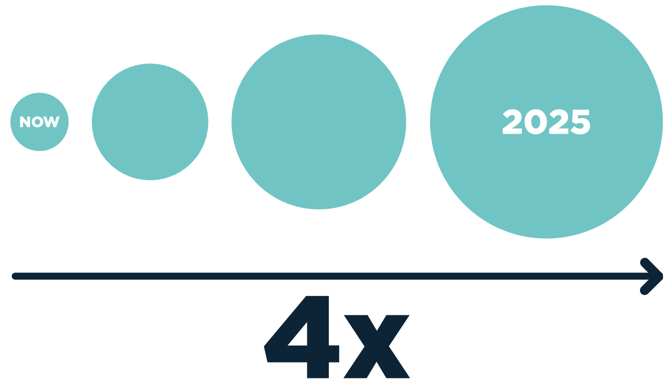
~60%
reusable, recyclable or compostable today

<3% reusable
~60% recyclable
<1% compostable

REUSE, RECYCLING OR COMPOSTING IN PRACTICE

Recycling company signatories have committed to quadruple the amount they process by 2025. Signatories from across the plastics value chain — including recyclers but also plastic producers and packaging producers — as well as governments are currently making substantial investments in infrastructure required to achieve this targeted increase and respond to increased demand for post-consumer recycled content (PCR). Through Plastic Pacts, several government signatories are also collaborating with industry and other stakeholders to reach specific 2025 recycling rate targets for plastic packaging of up to 70%.[5] Early steps are being taken and investments made to move towards the delivery of chemical recycling at scale. New technologies are being used to improve the ability of recyclers to sort complex waste streams and produce a better quality of recycling output.

Recyclers have committed to increasing their collective processing capacity by four times between now and 2025[6]



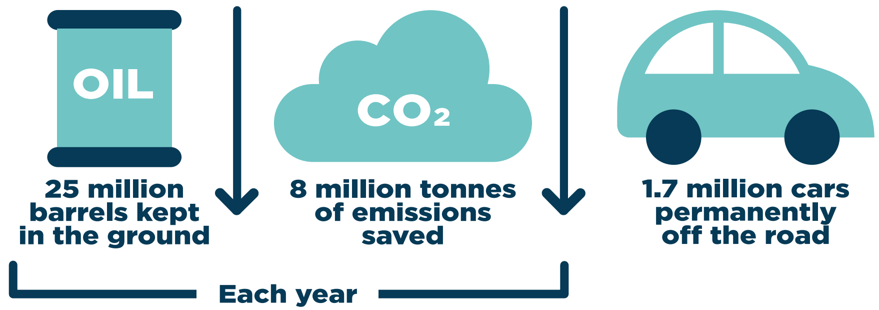
DECOUPLING FROM THE CONSUMPTION OF FINITE RESOURCES

Signatories are beginning to set explicit targets to reduce virgin plastic consumption in absolute terms. Signatories' efforts on elimination, reuse, recycled content, and substitution are driving a decoupling from finite resources. This has led companies like **Unilever** (50%) and **Mars, Incorporated** (25%) to set 2025 targets to reduce their overall use of virgin plastic in packaging, with **PepsiCo** doing the same for its beverage business (20%).

Packaged goods companies and retailers committed to an average of 22% recycled content in their packaging by 2025. This is a five-times increase on their 2018 average of 4% (which is already double the estimated global average).[7] Signatories' total 2025 annual demand for post-consumer recycled plastics going into packaging is estimated at more than 5 million tonnes. Governments are adopting measures to drive increased use of recycled content, including the **Government of the United Kingdom's** tax on plastic packaging that contains less than 30% recycled content, which will be introduced in 2022. Progress is being made towards these targets already: the use of recycled content in signatories' packaging grew by 23% between 2017 and 2018.[8] On top of that, major plastic producers **Borealis** and **Indorama Ventures** committed to increase recycled content volumes 350,000 tonnes and at least 750,000 tonnes respectively, with **Indorama Ventures** recently pledging USD 1.5 billion investment towards achieving this target.

↓ **3** major global fast-moving consumer goods companies have committed to reduce their use of virgin plastics in packaging

Over **5 million tonnes** of demand for recycled content by 2025 — equivalent to:[9,10]



TRANSPARENCY

Unprecedented transparency across the industry on progress towards targets and on plastic usage has created a clear baseline against which to measure progress. For the first time, 176 of the eligible 189 business signatories and 14 of 16 eligible governments have reported on progress towards realising their public targets, all using common language and definitions.[11] This provides a baseline against which progress can be tracked in the years ahead. Of this group, 35 companies (20% of eligible signatories) have disclosed their total tonnage of plastic production or usage. Companies such as **Danone**, **Nestlé** and **The Coca-Cola Company** have gone beyond that by also providing insight into their portfolio by packaging type, polymer type, or number of units.

Public reporting on progress by signatories including:[12]

20%
of global plastic packaging volume represented

34
companies disclosing volumes collectively representing 9 million tonnes of plastic packaging a year

6 out of the top 10
global FMCG companiesMedi

7 out of the top 10
global plastic packaging producers

SYNTHESIS OF PROGRESS REPORTED BY THE TOP 10 FMCG COMPANIES BY REVENUES

	PACKAGING DESIGN	RECYCLED CONTENT	STAGE OF ENGAGEMENT WITH REUSE	PLASTIC PACKAGING VOLUME
	%, by weight, of plastic packaging reusable, recyclable, or compostable (2018 / 2025 Target)	%, by weight, of post-consumer recycled content in plastic packaging (2018 / 2025 Target)	Stages: opportunity analysis / piloting / small part of portfolio / significant part of portfolio	Millions of metric tonnes per annum
1. Nestlé	65%	2% / 15%	**Small part of portfolio**	1.7
2. Procter & Gamble	NOT A GLOBAL COMMITMENT SIGNATORY			
3. PepsiCo	77%	3% / 25%	**Small part of portfolio**	2.3
4. AB InBev	NOT A GLOBAL COMMITMENT SIGNATORY			
5. Unilever	~50%*	<1% / 25%	**Small part of portfolio**	0.7
6. JBS	NOT A GLOBAL COMMITMENT SIGNATORY			
7. Tyson Foods	NOT A GLOBAL COMMITMENT SIGNATORY			
8. Mars, Incorporated	19%	0% / 30%	**Small part of portfolio**	0.2
9. The Coca-Cola Company	99%**	9% / N/A***	**Significant part of portfolio**	3.0
10. L'Oréal	N/A****	5% / 40%	**Small part of portfolio**	0.1

Note on material sourcing targets: Unilever (50%) and Mars, Incorporated (25%) have set 2025 targets to reduce the use of virgin plastics in packaging in absolute terms. PepsiCo has done the same (20%) for its beverage business. L'Oréal has set itself a 2025 target to ensure that 50% of its plastic packaging is not made from virgin fossil plastics.

Note on reporting timeframes: All quantitative data are provided for the latest year reported, in most cases for the relevant company's financial year ending 2018. More details of the reporting timeframe for each signatory is provided in their individual reports in Section 4.

* Unilever 2017 estimate: Recyclability assessment (Jan 2017 to Dec 2017) is subject to change once fully integrated into Unilever systems. Unilever will be reporting its next set of results in line with its reporting cycle in its 2019 Annual Report.

** The Coca-Cola Company's number is an estimate for its global volume of primary plastic packaging only. The company is currently preparing to assess and disclose for secondary and tertiary plastic packaging, such as shrink films or other transit packaging.

*** The Coca-Cola Company has a 2030 target to use 50% recycled material in all primary packaging by 2030.

**** Reported to the Foundation only, to be published in 2020

1.2 PERSPECTIVE ON PROGRESS

In this section the Ellen MacArthur Foundation and the UN Environment Programme reflect on the promising progress over the first year and the actions still required to make plastic pollution a thing of the past.

CURRENT MOMENTUM BEHIND A CIRCULAR ECONOMY FOR PLASTICS IS UNPRECEDENTED

Businesses representing over 20% of all plastic packaging globally have for the first time united behind a common vision for a circular economy for plastics, together with 19 forward-thinking governments. They are leading the way and raising ambition levels across the industry.

Just over a year ago, very few organisations had targets in place that met the 'minimum bar' of ambition level defined by the Global Commitment. Almost all business and government signatories have significantly raised their ambition level over the past year in order to join the Global Commitment, and as such have stepped forward as leaders.

Importantly, these organisations have committed to publicly report on progress annually, making a significant contribution to increasing transparency on plastic issues and solutions. We appreciate the effort they have put into the reporting process and compliment all signatories for having embarked on the journey.

The alignment of a large group of important stakeholders behind a common vision has helped drive decisive action by businesses, governments and the NGO community globally. The common vision has increased the consistency and complementarity of the many much-needed initiatives that are emerging to solve the plastic pollution problem. Several major programmes are led by signatories of the Global Commitment, such as **World Wide Fund for Nature (WWF)** global No Plastics in Nature Campaign, the **World Economic Forum's** Global Plastics Action Partnership, **The Recycling Partnership's** Bridge to Circularity and the New Plastics Economy's network of **Plastics Pacts** that are being set up in countries around the world.

PROMISING EARLY PROGRESS TOWARDS TARGETS IS BEING MADE BY GLOBAL COMMITMENT SIGNATORIES

Signatories are laying the foundations to deliver and scale efforts towards achieving their 2025 targets. Joining the Global Commitment has led many business signatories to quantify and assess their packaging portfolio in detail for the first time. These assessment exercises, together with the target setting process, have informed and driven the development of new and concrete plans, roadmaps, and innovation agendas aimed at meeting the 2025 targets. This is illustrated by the many business and government signatories that reported plans to eliminate the most commonly identified problematic items, new targets to increase the use of recycled content and national recycling rates significantly, and announced investments. Investments include **Indorama Ventures'** pledge to invest USD 1.5 billion towards achieving its recycled content target, and the **Government of the United Kingdom's** mobilisation of approximately GBP 3 billion towards improving local collection and recycling infrastructure and packaging innovation. As they prepare for delivery and scaling of efforts, a number of signatories have also established new internal task forces or added capacity to existing teams. This resourcing will drive programmes, as well as engagement with suppliers, customers and other partners to implement change collaboratively.

Beyond this foundation-laying, there is already evidence of progress being made against targets. 34 signatories will accomplish elimination of at least one commonly identified problematic packaging category in 2019 or 2020. 43 signatories reported active reuse pilots. Furthermore, various signatories reported changes to their packaging design through colour, format or material choices to increase recyclability. Finally, the use of recycled content increased by an average of 23% between 2017 and 2018 for the 52 signatories reporting prior year data.

Several signatories are already raising their ambition level further by setting additional targets. Among the most prominent examples are the 2025 targets to reduce overall use of virgin plastics set by **Unilever (50%)** and **Mars, Incorporated (25%)**, with **PepsiCo** doing the same for its beverage business **(20%)**.

This report establishes an essential quantitative baseline which will enable the measurement of progress over the coming years. With just one year of data, it is not yet possible to comprehensively and quantitatively measure collective progress.[13] However, one year in, we do see significant initial steps being taken by Global Commitment signatories that will lay the foundations for their work to deliver on the targets over the coming years.

EFFORTS BEYOND RECYCLING NEED A HIGHER AMBITION LEVEL

A further increase in the ambition to go 'beyond recycling' will be required to address plastic waste and pollution at source. Better recycling is vital, and it is encouraging to see the extent of efforts in the signatory group to improve recyclability, increase recycling capacity and include more recycled content. Yet to eliminate plastic waste and pollution, these efforts on recycling need to be matched by a similar investment and ambition level across the full range of solutions, including elimination and reuse. While some progress is being made in these areas, elimination efforts are mainly focused on a narrow set of packaging items widely considered problematic (for example, PVC, ePS, and single-use straws and bags), and most reuse efforts are small-scale pilots. Both require a more fundamental approach with significantly higher ambition levels.

There is an opportunity for a more fundamental, innovation-led elimination agenda to complement the elimination of the most commonly identified problematic packaging. This would see additional elimination of packaging through fundamental innovation in product and packaging design, business models and supply chains. Examples include the use of dry-misting technology by **Ahold Delhaize** to keep fruit and vegetables fresh without the need for plastic packaging and **Danone**'s launch of a new AQUA water bottle line without labels, where the logo is integrated into the bottle shape in Indonesia.

It is crucial that sufficient ambition and investment are put behind reuse efforts in order to move towards deployment at scale. We are pleased to see the recent increase in the number of active reuse pilots. It will now be crucial for these to reach scale quickly. The Foundation highlighted the wide variety of reuse business models and associated benefits for businesses and their consumers in its REUSE book, to inspire more businesses to shift from single-use to reuse models at scale.

We encourage signatories to set explicit targets to reduce their virgin plastics consumption. Such reduction is in many ways a natural consequence of the other Global Commitment targets, which work to eliminate the plastics we don't need and use more recycled content for the plastics we do need. Yet calling it out explicitly sends a clear signal that we need to reduce, and ultimately fully decouple, the use of packaging from the consumption of finite fossil resources. We therefore support the explicit 2025 targets to reduce total consumption of virgin plastic for packaging set by **Unilever (50%)** and **Mars, Incorporated (25%),** as well as that set by **PepsiCo** for its beverage business **(20%)**, and encourage many more signatories to follow their lead. Initiatives like the recently launched 'Sea the Future' by Minderoo Foundation are also incentivising a decoupling from virgin fossil resources through a proposed voluntary financial contribution payable on virgin fossil-based plastic production.

Any virgin reduction target should focus as its underlying delivery mechanisms on *both* eliminating the plastics we don't need through innovation and reuse, *and* increasing recycled content for those plastics we do need. **Unilever** is one example of a company that has made this dual strategy explicit, by highlighting its target to reduce its overall use of plastic packaging by more than 100,000 tonnes by 2025. This will be through, among other strategies, reuse, refill and packaging-free solutions, with the remaining virgin reduction to be achieved through the increased use of recycled content. While material substitution and light-weighting are part of the mix of available elimination levers, a simplistic approach applying predominantly these two actions would not realise the desired shift towards a circular economy and — if not considered with a systems perspective — could come with unintended consequences.

ACCELERATED PROGRESS IS NOW CRUCIAL

Continued acceleration and scaling of action is required to achieve the 2025 targets. Signatories have significantly raised their ambition levels, are developing roadmaps to realise these ambitions, and are reporting initial results. Now we need to see continued acceleration of action. Major investments, innovations, and transformation programmes must be started now to generate impact at scale by 2025.

It is crucial that more businesses and governments join the Global Commitment and embark on a journey towards a circular economy. It is encouraging to see leading organisations step up their efforts. Now it is imperative that more businesses and governments follow their lead in order to achieve systemic change. In particular, both plastic producers and hospitality and food service companies — such as take-away food chains, hotels, and airlines — are currently under-represented in the Global Commitment signatory group. Building on the momentum the frontrunners have created, we call on all relevant businesses and governments to join the Global Commitment and embark on a journey towards a circular economy.

SECTION 2:
THE SIGNATORY GROUP

A.I.S.E., International Association for Soaps, Detergents and Maintenance Products • actiam • Adrian Dominican Sisters, Portfolio Advisory Board • AECOC • Afeka Institute of Circular Engineering and Economy • AGMPM (Association of the Greek Manufacturers of Packaging & Materials) • Ahold Delhaize • ALBEA • Algramo • ALPLA Werke Alwin Lehner GmbH & Co KG • Althelia Sustainable Ocean Fund • Amcor • American Licorice Company • ANIPAC • APK AG • APLM - Portuguese Marine Litter Association • AptarGroup Inc. • Aquapak Polymers Limited • Arca Continental • Archemics Ltd • Arup • As You Sow • Asia Pacific Waste Consultants (APWC) • Asociación Chilena para el Fomento de la Economía del Bien Común - (EBC) • Asociación Nacional de la Industria Quimica A.C. (ANIQ) • Associação para as Ciências do Mar - APCM • Atalay Atasu • Avespa • Bangor University • Barilla G. & R. Fratelli SpA • Baum und Pferdgarten • Bell Holding • Bella+Frank • Berkeley Center for Green Chemistry • Berry Global • bioMASON, Inc. • Biopac UK Ltd • BioPak Pty Ltd • Bioproducts Discovery and Development Centre (BDDC), University of Guelph, Ontario, Canada • BMO Global Asset Management • BNP Paribas Asset Management • Boomera • Borealis AG • Boston Common Asset Management • Brightplus Oy • Brunel Pension Partnership Ltd • Burberry Group plc • Burberry Material Futures Research Group from the Royal College of Art • Business in the Community • C40 Cities Climate Leadership Group • Cabot Corporation • Californians Against Waste • Calouste Gulbenkian Foundation • CAPTURE • CarbonLITE Recycling • Carrefour • CBPAK Tecnologia S/A • Cedo • CEFLEX • CEMPRE Colombia - Compromiso Empresarial para el Reciclaje • China Plastic Recycling Association of China Resource Recycling Association • China Plastics Reuse and Recycling Association • Circular Economy Initiative at KTH Royal Institute of Technology (CE@KTH) • Circular Economy Innovation Centre - USP • CIRCULAR ECONOMY JAPAN • Circular Economy Leadership Coalition • Circular Sweden • Circularity Capital LLP • Circulate Capital • Circulo Verde • City of Austin • Clarmondial • Cleaning and Hygiene Suppliers Association • Closed Loop Partners • Coast Impact Fund • Coca-Cola FEMSA • Colgate-Palmolive Company • College of Design and Innovation, Tongji University • Commonsense • Congregation of St. Joseph • Constantia Flexibles • Core Capital Management LLC • Corn Refiners Association • Creolus • CSSA (Canadian Stewardship Services Alliance Inc.) • Cumapol BV • CupClub Limited • Custompak Plastic Products 1997 ltd • Danone S.A. • Daughters of Charity, Province of St. Louise • Delphis Eco • Department of Economics and Management - Dipartimento di Scienze Economiche e Aziendali, University of Pavia • Detpak • Diageo • Digimarc Corporation • Dignity Health • Dr Girma Zawdie • Dr. Alysia Garmulewicz, Professor, Universidad de Santiago de Chile • Dr. Carson Meredith • Dragon Rouge Limited • Dynapack Asia • Earthwatch Institute • Earthwise Group Ltd • ECOCE • ECOGESTUS, Waste Management Ltd • Ecoiberia Reciclados Ibericos SA • ECOPIXEL • Ecopod • ecostore • Ecosurety • Ecovative • EGF - Environment Global Facilities • Elemental Impact • ELISAVA Barcelona School of Design and Engineering • Encorp Pacific (Canada) • ENGEL Austria GmbH • Envases Universales de México • Enviro Pride • Environment Department, Ministry of Environment, Energy and Climate Change, Republic of Seychelles • EPRO European Plastics Recycling and Recovery Organisation • Ernesto São Simão Lda. • ESG Portfolio Management • Essity AB • Etica Sgr - Responsible Investments • European Investment Bank • European Recycling Industries' Confederation (EuRIC) • EXCELRISE • Excess Materials Exchange • Exchange 4 Change Brasil • Faculty of Management, Law and Social Sciences, University of Bradford • Ferrero • Fifth Season Ventures • Flex Film International BV • Flexible Packaging Europe • Food & Consumer Products of Canada • FoodDrinkEurope • Footprints Africa • FORWARD.one Venture Capital for Hardware • Foundation Recysol • FrieslandCampina Nederland B.V. • Full Cycle Bioplastics • Fundacion Latinoamérica Verde • Futamura Group • GANNI • gDiapers • Generalitat de Catalunya • Gobierno de la Ciudad de Buenos Aires • Government of Chile • Government of Grenada • Government of Rwanda • Graham Packaging Company • Granta Design • Greco & Guerreiro • GreenBiz Group Inc. • GreenBlue and the Sustainable Packaging Coalition (SPC) • Greiner AG • GRID-Arendal • GW&K Investment Management • H. Ayuntamiento de Toluca • H&M Group • Henkel AG & Co. KGaA • Hera Group • Hermes EOS • Hi-Cone • High Speed Sustainable Manufacturing Institute (HSSMI) • HP Inc. • Husky Injection Molding Systems Ltd. • INCOM RECYCLE Co., Ltd. Beijing • Inditex • Indonesian Waste Platform • Indorama Ventures Public Company Limited • Industria Mexicana de Reciclaje S.A. de C.V. • ING • INGRUP • innocent drinks • Insper Instituto de Ensino e Pesquisa • Institut für Kunststofftechnik • Institute for Integrated Quality Design (IQD), Johannes Kepler University Linz (JKU) • Institute of Development Studies • Institute of Technology Tralee • Instituto Italiano di Tecnologia • International Solid Waste Association - ISWA • International Union for Conservation of Nature (IUCN) • Internet Fusion Group • IWC Schaffhausen • iWrc • Jabil Packaging Solutions • JAMES CROPPER PLC • Jan Ravenstijn Biomaterials Consulting • Jane Penty • JAVA MOUNTAIN COFFEE • Johnson and Johnson Consumer Health • Kagad Kach Patra Kashtakari Panchayat • Keep Scotland Beautiful • KEEP SWEDEN TIDY • Kellogg Company • Kempen Capital Management • Kesko Corporation • Keurig Dr Pepper • Kiara S. Winans • Kiduara • Kingfa Sci. & Tech. Co., Ltd. • Kmart Australia Limited • Koepala Packaging Ltd. • L'Oréal • L'OCCITANE en Provence • Legal & General Investment Management • Life Cycle Initiative • Life Without Plastic • LIPOR - Intermunicipal Waste Management of Greater Porto, Portugal • LLUK • Logoplaste • Loliware • London Waste and Recycling Board • Loop • Loop Circular Economy Platform Ltd • Loop Industries • LPP • Man Group • MARE - Marine and Environmental Sciences Centre [PORTUGAL] • Marks and Spencer plc • Mars, Incorporated • Material BA-Z, Centro Universitário Belas Artes de São Paulo • Material Economics • Matrix APA (UK) Ltd. • McCormick & Company Inc. • McDonough Innovation • Melco Resorts & Entertainment • MERA - The Association for Sustainable Manufacturing • Mercy Investment Services, Inc. • METRO AG • Meu Copo Eco • Michigan State University • Ministry for the Environment New Zealand • Ministry of Environment and Energy Transition - Portugal • Ministry of the Environment (Peru) • Ministry of the Environment of the Government of the State of Mexico • MIT Environmental Solutions Initiative • MIWA (MInimum WAste) • Mobike • mobius • Molson Coors Brewing Company • Mondi • Monterey Bay Aquarium • Mr. Green Africa • Multi-Color Corporation • Mundane Matters Pty Ltd • MYO Cosmetic Cases • National Geographic Partners, LLC • National Recycling Coalition • NATURA COSMETICS • Nature's Path Foods • NatureWorks • Nestlé • Netherlands Institute for Sustainable Packaging • New Zealand King Salmon Company Ltd • Nextek Ltd. • Noble Environmental Technologies Europe BV • NorthEdge Capital • Notpla Limited • Nova School of Business and Economics • Novamont SpA • NOVAPET • Nuceria Group • Ocean Plastic Solutions Network at Imperial College London • Ocean Remedy • Oceanographic Institute, Prince Albert I of Monaco Foundation • Okena Serviços Ambientais • Oliver Wyman • One Water • Open Systems Lab • Openbare Vlaamse Afval Maatschappij OVAM • Origin Materials • PA Consulting • PAC Worldwide • Paccor packaging solutions • Pack4Food • PepsiCo • Pernod Ricard • PetStar • Philips • Pick n Pay • Pinguimom • Plant Based Products Council • Plant Chicago • Plastic Bank Recycling Corporation • Plastic Collective • Plastic Energy • Plastic Odyssey • Plasticos Compuestos S.A. • Plastics Forming Enterprises, LLC • Plastics Recyclers Europe • Poppelmann Holding GmbH & Co. KG • POSITIV.A • Preserve • Prince Albert II of Monaco Foundation • Prof. Claudio Zara, Department of Finance, Bocconi University • Prof. Richard C. Thompson OBE • Professor Ioannis Ioannou • PROQUIMIA, S.A. • Provenance • PT Evogaia Karya Indonesia • Qualipac • Quantis • Ramani Narayan, MSU University Distinguished Professor • Rathbone Greenbank Investments • Ravensbourne University London - Fashion Department • RB • Re-Poly, Evertrak, QRS • RecyclePoints • Recycling Technologies • Rediscovery Centre • RePack • Replenish Bottling LLC • rePurpose Global • RES Group • Reusable Packaging Association • Riversimple Movement Ltd • Robeco • Robert Lochhead, Professor and Director Emeritus of Polymer Science • Rodenburg Biopolymers • Royal Society of Chemistry • rPlanet Earth • Rubicon Global • S Group • SAMBITO • Samsøe Samsøe • São Paulo City Hall • Sarasin & Partners • SC Johnson • Schneider Electric • School of Management - Politecnico di Milano • Schwarz Group (Lidl & Kaufland) • Scottish Government • Sealed Air Corporation • Searious Business • Selfridges • Serioplast Global Services Spa • Shanghai Rendu Ocean NPO Development Center • SHAPES IN THE SAND • Sidel • Silgan Plastics • SIRQLR • Sistema B International • Sky Group • Skyroom London Ltd • Smart Waste Portugal - Business Development Network • Solid Waste Association of North America • SONAE MC • Sostenibilidad 3Rs&Es • South Pole • Spadel • SPB • Spinlock • Splosh Ltd. • Stanley Black & Decker • Stella McCartney • Stora Enso • Suez • Superdry Plc • SUST4IN • Sustainable Business Network • Sustainalytics • Svensk Plastindustriförening (SPIF) • SWANIA • Swire Coca-Cola Ltd • SYSTEMIQ • Taiwan Circular Economy Network (循環台灣基金會) • Target Corporation • Target Australia Limited • TC Transcontinental • Termoencogibles, SA de CV • TerraCycle • Tetra Pak • The Association of Plastic Recyclers • The Better Packaging Co. • The Bio-D Company Ltd • The City of Copenhagen • The City of Ljubljana, Slovenia • The Clorox Company • The Club of Rome • The Coca-Cola Company • The Consumer Goods Forum • The Eric and Wendy Schmidt Fund for Strategic Innovation • The Faculty of Entrepreneurship & Innovation - VIA University College • The Finnish Innovation Fund SITRA • The Global Environment Facility • The Government of France • The Government of the United Kingdom • The Grameen Creative Lab • The Green Earth • The Institute for the Study of Science and Technology, National University of Quilmes (IESCT-UNQ) of Argentina • The Make-Cup Brand Make-Cup Concepts LLC. • The Ocean Race • The Recycling Partnership • The Renewal Workshop • The RSA • The Walloon Government • Think Beyond Plastic • Tipa-Corp • TOMRA Systems ASA • Topolytics • TriCiclos • Trillium Asset Management • Tupack Verpackungen Gesellschaft m.b.H • Tupperware • UCL • Ultra Capital • Uncover Skincare BV • Unilever • Universidade de Trás-os-Montes e Alto Douro • Universiteit Gent • University of Edinburgh • University of Northumbria, Newcastle • University of Portsmouth • UPM Raflatac • Upp! UpCycling Plastic BV • ValGroup • Veolia • Verstraete in mould labels • Vert Asset Management • Vita BioEnergia ltda • Walmart Inc. • Warner Babcock Institute for Green Chemistry • Waste Ventures India Pvt. Ltd. • Waste4Change • Water Unite • Werner & Mertz GmbH • Woolworths Holdings Limited • World Economic Forum • Worn Again Technologies • WPP • WRAP • Wraptie International Ltd. • World Wildlife Fund (WWF) • Xiamen Luhai Pro-environment Inc. • Zero Waste Shop Moscow • Zespri Group Limited • Zevin Asset Management • ZigZag Global • π^3= Plastic Pollution Prevention

THE SIGNATORY GROUP

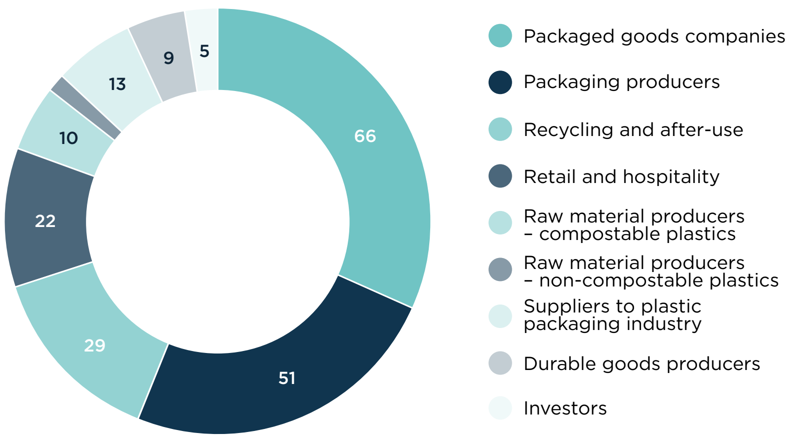
The signatory group has grown from over 250 organisations upon launch, in October 2018, to more than 400 in October 2019. A complete list of signatories can be found in the appendix of this document.

OVERVIEW OF BUSINESS SIGNATORIES

Businesses across the plastic packaging value chain have signed the Global Commitment. The number of business signatories has doubled to more than 200 in the first year since its launch. Together, business signatories account for more than 20% of all plastic packaging produced globally and collective revenues in excess of USD 2 trillion.

The signatory group includes many of the world's largest consumer packaged goods companies, retailers, and plastic packaging producers, as well as major plastic producers, recyclers and after-use companies, durable goods companies, investors, and innovators.

OVERVIEW OF BUSINESS SIGNATORIES



Global Commitment signatories include:[14]

5
of the top 15 global retailers[15]

2
of the world's largest environmental services companies[16]

6 out of the top 10
global FMCG companies[17]

7 out of the top 10
global plastic packaging producers[18]

There are some important sectors that have shown minimal engagement with the Global Commitment. First of all, we call on plastic producers to join the Global Commitment and become part of an economy based on the circulation, rather than continued extraction, of raw materials. In addition, hospitality and food service companies, such as take-away food chains, hotels, and airlines, use significant volumes of single-use plastic packaging but are currently underrepresented in the Global Commitment.

COVERAGE OF THE LARGEST FMCG, PLASTIC PACKAGING AND RETAIL COMPANIES

#	FMCG	
1	Nestlé	Signatory
2	Procter & Gamble	Not a signatory
3	PepsiCo	Signatory
4	AB Inbev	Not a signatory
5	Unilever	Signatory
6	JBS	Not a signatory
7	Tyson Foods	Not a signatory
8	Mars, Incorporated	Signatory
9	The Coca-Cola Company	Signatory
10	L'Oréal	Signatory

#	Plastic packaging	
1	Reynolds	Not a signatory
2	Amcor	Signatory
3	Berry Global	Signatory
4	Sealed Air Corporation	Signatory
5	RPC Group	Recently aquired by a signatory
6	Bemis	Recently aquired by a signatory
7	ALPLA Group	Signatory
8	Interplast	Not a signatory
9	Aptargroup Inc.	Signatory
10	Silgan	Not a signatory

#	Retail	
1	WalMart Inc.	Signatory
2	Amazon	Not a signatory
3	CVS Health	Not a signatory
4	Costco	Not a signatory
5	Walgreens Boots Alliance	Not a signatory
6	The Kroger Co	Not a signatory
7	Schwarz Group	Signatory
8	Home Depot	Not a signatory
9	Tesco Plc	Not a signatory
10	Aeon	Not a signatory
11	Carrefour	Signatory
12	Ahold Delhaize	Signatory
13	Target	Signatory
14	Lowe's Companies	Not a signatory
15	Seven & I Holdings	Not a signatory

Signatory of the Global Commitment

Not a signatory of the Global Commitment

Recently aquired by a signatory of the Global Commitment*

Note on rankings

The ranking of the FMCG companies is based on annual revenues, as they were reported to the Ellen MacArthur Foundation or as published by *Forbes*, 'Global 2000, the world's largest public companies' (May 15 2019), https://www.forbes.com/global2000/#63e7ee3b335d

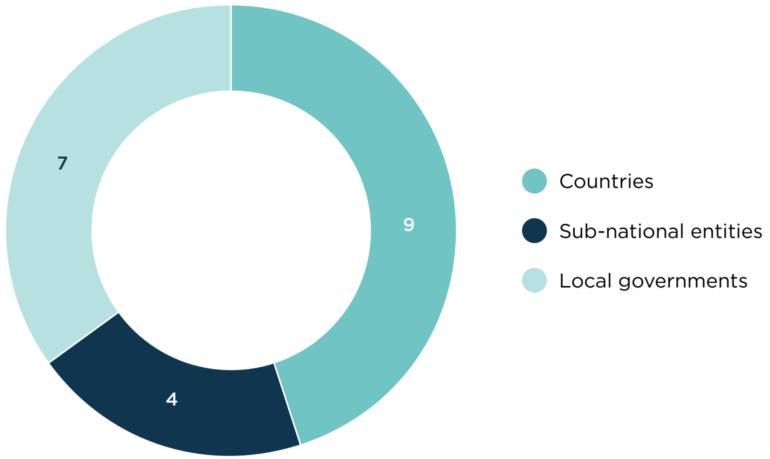
The rankings of these packaging producers are based on their market share, as published in Citi GPS, 'Global Perspectives and Solutions, Rethinking single-use plastics: responding to a sea change in consumer behavior' (2018) https://www.citivelocity.com/citigps/rethinking-plastics/

The rankings of these retail companies is based on annual revenues as they were reported to the Ellen MacArthur Foundation or as published by *Forbes,* 'Global 2000, the world's largest public companies'

(May 15 2019), https://www.forbes.com/global2000/#63e7ee3b335d

* RPC Group and Bemis are in scope through recent acquisitions by Berry Global and Amcor

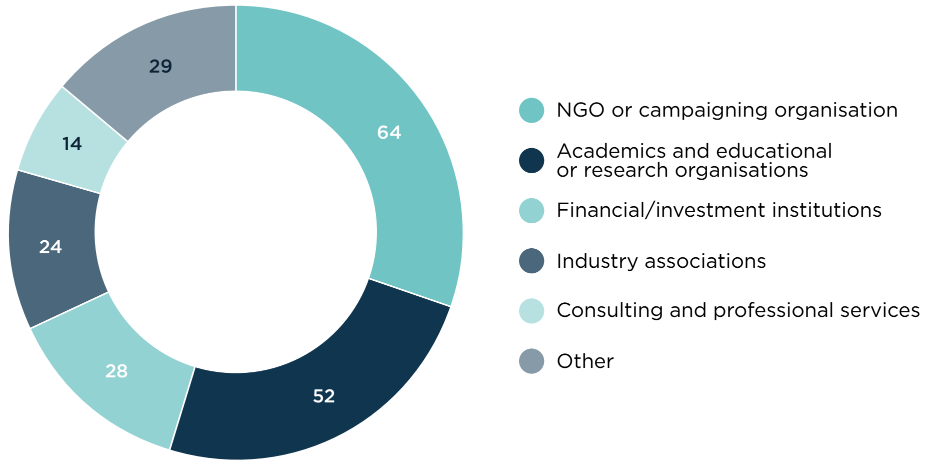
OVERVIEW OF GOVERNMENT SIGNATORIES



The government signatories group comprises 19 governments at national, sub-national, and local level, across five continents.[19]

In **Chile**, **France**, and the **United Kingdom** national initiatives were launched as part of the Ellen MacArthur Foundation's Plastics Pact network, which brings together key stakeholders at the national or regional level to implement solutions towards a circular economy for plastics. Each initiative involves a concrete set of 2025 targets for the country or region.[20]

OVERVIEW OF ENDORSING SIGNATORIES



In addition to the business and government signatories, the Global Commitment has been endorsed by more than 200 other organisations and individuals. These endorsing signatories include some of the world's most influential institutions — such as **World Wide Fund for Nature (WWF)**, the **World Economic Forum**, the **Consumer Goods Forum**, the **C40 Cities Climate Leadership Group**, and the **International Union for Conservation of Nature (IUCN)** — as well as 50 universities, institutions, and academics.

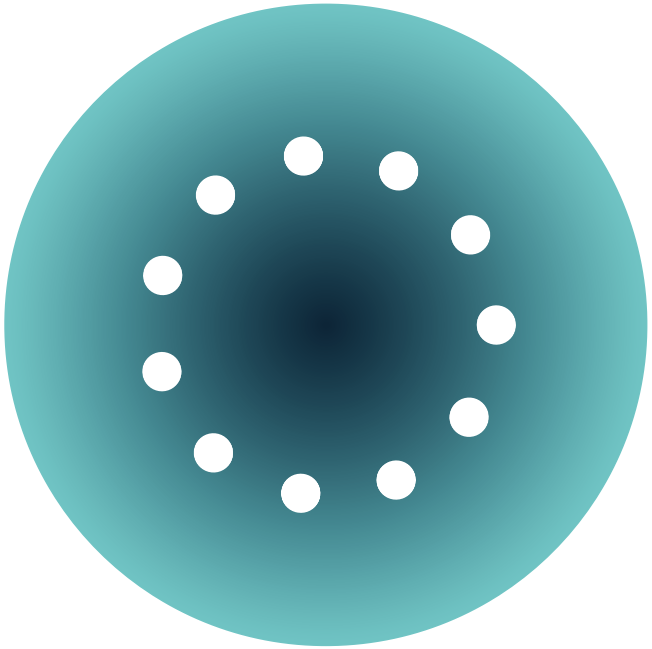
The Global Commitment also includes 27 financial institutions that jointly represent USD 4 trillion of assets under management, including **Legal & General Investment Management**, the **European Investment Bank**, **BNP Paribas Asset Management**, and **Robeco**.

The vision is further supported by key influencers such as Ellen MacArthur (Founder, Ellen MacArthur Foundation), HSH Prince Albert II of Monaco, Frans Timmermans (Executive Vice-President, European Commission), Stella McCartney (Founder, Stella McCartney), Gonzalo Munoz (Co-founder, Sistema B International and B Lab Board Member), Julie Packard (Executive Director, Monterey Bay Aquariam), Wendy Schmidt (President, The Schmidt Family Foundation), Pavan Sukdhev (President, WWF International), Dominic Waughray (Head of Centre for Global Public Goods, Member of the Executive Committee, World Economic Forum), and others.[21]

SECTION 3:
PROGRESS ACROSS THE SIGNATORY GROUP

This section presents insights and examples from across the signatory group. Individual signatory responses can be found in Part 2.

A.I.S.E., International Association for Soaps,
Detergents and Maintenance Products • actiam • Adrian
Dominican Sisters, Portfolio Advisory Board • AECOC • Afeka Institute of
Circular Engineering and Economy • AGMPM (Association of the Greek Manufacturers of
Packaging & Materials) • Ahold Delhaize • ALBEA • Algramo • ALPLA Werke Alwin Lehner GmbH &
Co KG • Althelia Sustainable Ocean Fund • Amcor • American Licorice Company • ANIPAC • APK AG • APLM
- Portuguese Marine Litter Association • AptarGroup Inc. • Aquapak Polymers Limited • Arca Continental • Archemics
Ltd • Arup • As You Sow • Asia Pacific Waste Consultants (APWC) • Asociación Chilena para el Fomento de la Economía del
Bien Común - (EBC) • Asociación Nacional de la Industria Quimica A.C. (ANIQ) • Associação para as Ciências do Mar - APCM •
Atalay Atasu • Avespa • Bangor University • Barilla G. & R. Fratelli SpA • Baum und Pferdgarten • Bell Holding • Bella+Frank • Berkeley
Center for Green Chemistry • Berry Global • bioMASON, Inc. • Biopac UK Ltd • BioPak Pty Ltd • Bioproducts Discovery and Development Centre
(BDDC), University of Guelph, Ontario, Canada • BMO Global Asset Management • BNP Paribas Asset Management • Boomera • Borealis AG • Boston
Common Asset Management • Brightplus Oy • Brunel Pension Partnership Ltd • Burberry Group plc • Burberry Material Futures Research Group from the
Royal College of Art • Business in the Community • C40 Cities Climate Leadership Group • Cabot Corporation • Californians Against Waste • Calouste
Gulbenkian Foundation • CAPTURE • CarbonLITE Recycling • Carrefour • CBPAK Tecnologia S/A • Cedo • CEFLEX • CEMPRE Colombia - Compromiso Empresarial
para el Reciclaje • China Plastic Recycling Association of China Resource Recycling Association • China Plastics Reuse and Recycling Association • Circular Economy
Initiative at KTH Royal Institute of Technology (CE@KTH) • Circular Economy Innovation Centre - USP • CIRCULAR ECONOMY JAPAN • Circular Economy Leadership
Coalition • Circular Sweden • Circularity Capital LLP • Circulate Capital • Círculo Verde • City of Austin • Clarmondial • Cleaning and Hygiene Suppliers Association • Closed
Loop Partners • Coast Impact Fund • Coca-Cola FEMSA • Colgate-Palmolive Company • College of Design and Innovation, Tongji University • Commonsense • Congregation of St.
Joseph • Constantia Flexibles • Core Capital Management LLC • Corn Refiners Association • Creolus • CSSA (Canadian Stewardship Services Alliance Inc.) • Cumapol BV • CupClub
Limited • Custompak Plastic Products 1997 ltd • Danone S.A. • Daughters of Charity, Province of St. Louise • Delphis Eco • Department of Economics and Management - Dipartimento di
Scienze Economiche e Aziendali, University of Pavia • Detpak • Diageo • Digimarc Corporation • Dignity Health • Dr Girma Zawdie • Dr. Alysia Garmulewicz, Professor, Universidad de
Santiago de Chile • Dr. Carson Meredith • Dragon Rouge Limited • Dynapack Asia • Earthwatch Institute • Earthwise Group Ltd • ECOCE •
ECOGESTUS, Waste Management Ltd • Ecoiberia Reciclados Ibericos SA • ECOPIXEL • Ecopod • ecostore • Ecosurety • Ecovative • EGF -
Environment Global Facilities • Elemental Impact • ELISAVA Barcelona School of Design and Engineering • Encorp Pacific (Canada) •
ENGEL Austria GmbH • Envases Universales de México • Enviro Pride • Environment Department, Ministry of Environment,
Energy and Climate Change, Republic of Seychelles • EPRO European Plastics Recycling and Recovery Organisation • Ernesto
São Simão Lda. • ESG Portfolio Management • Essity AB • Etica Sgr - Responsible Investments • European Investment
Bank • European Recycling Industries' Confederation (EuRIC) • EXCELRISE • Excess Materials Exchange • Exchange 4
Change Brasil • Faculty of Management, Law and Social Sciences, University of Bradford • Ferrero • Fifth Season Ventures •
Flex Film International BV • Flexible Packaging Europe • Food & Consumer Products of Canada • FoodDrinkEurope • Footprints
Africa • FORWARD.one Venture Capital for Hardware • Foundation Recysol • FrieslandCampina Nederland B.V. • Full Cycle
Bioplastics • Fundacion Latinoamérica Verde • Futamura Group • GANNI • gDiapers • Generalitat de Catalunya • Gobierno de la
Ciudad de Buenos Aires • Government of Chile • Government of Grenada • Government of Rwanda • Graham Packaging Company • Granta
Design • Greco & Guerreiro • GreenBiz Group Inc. • GreenBlue and the Sustainable Packaging Coalition (SPC) • Greiner AG • GRID-Arendal •
GW&K Investment Management • H. Ayuntamiento de Toluca • H&M Group • Henkel AG & Co. KGaA • Hera Group • Hermes EOS • Hi-Cone • High
Speed Sustainable Manufacturing Institute (HSSMI) • HP Inc. • Husky Injection Molding Systems Ltd. • INCOM RECYCLE Co., Ltd. Beijing • Inditex •
Indonesian Waste Platform • Indorama Ventures Public Company Limited • Industria Mexicana de Reciclaje S.A. de C.V. • ING • INGRUP • innocent
drinks • Insper Instituto de Ensino e Pesquisa • Institut für Kunststofftechnik • Institute for Integrated Quality Design (IQD), Johannes Kepler
University Linz (JKU) • Institute of Development Studies • Institute of Technology Tralee • Instituto Italiano di Tecnologia • International Solid Waste
Association - ISWA • International Union for Conservation of Nature (IUCN) • Internet Fusion Group • IWC Schaffhausen • iWrc • Jabil Packaging
Solutions • JAMES CROPPER PLC • Jan Ravenstijn Biomaterials Consulting • Jane Penty • JAVA MOUNTAIN COFFEE • Johnson and Johnson Consumer Health •
Kagad Kach Patra Kashtakari Panchayat • Keep Scotland Beautiful • KEEP SWEDEN TIDY • Kellogg Company • Kempen Capital Management • Kesko Corporation •
Keurig Dr Pepper • Kiara S. Winans • Kiduara • Kingfa Sci. & Tech. Co., Ltd. • Kmart Australia Limited • Koepala Packaging Ltd. • L'Oréal • L'OCCITANE en Provence • Legal &
General Investment Management • Life Cycle Initiative • Life Without Plastic • LIPOR - Intermunicipal Waste Management of Greater Porto, Portugal • LLUK • Logoplaste • Loliware •
London Waste and Recycling Board • Loop • Loop Circular Economy Platform Ltd • Loop Industries • LPP • Man Group • MARE - Marine and Environmental Sciences Centre [PORTUGAL] •
Marks and Spencer plc • Mars, Incorporated • Material BA-Z, Centro Universitário Belas Artes de São Paulo • Material Economics • Matrix APA (UK) Ltd. • McCormick & Company Inc. •
McDonough Innovation • Melco Resorts & Entertainment • MERA - The Association for Sustainable Manufacturing • Mercy Investment Services, Inc. • METRO AG • Meu Copo Eco • Michigan State University •
Ministry for the Environment New Zealand • Ministry of Environment and Energy Transition - Portugal • Ministry of the Environment (Peru) • Ministry of the Environment of the Government of the State of Mexico • MIT
Environmental Solutions Initiative • MIWA (MInimum WAste) • Mobike • mobius • Molson Coors Brewing Company • Mondi • Monterey Bay Aquarium • Mr. Green Africa • Multi-Color Corporation • Mundane Matters Pty Ltd • MYO
Cosmetic Cases • National Geographic Partners, LLC • National Recycling Coalition • NATURA COSMETICS • Nature's Path Foods • NatureWorks • Nestlé • Netherlands Institute for Sustainable Packaging • New Zealand King Salmon Company Ltd • Nextek
Ltd. • Noble Environmental Technologies Europe BV • NorthEdge Capital • Notpla Limited • Nova School of Business and Economics • Novamont SpA • NOVAPET • Nuceria Group • Ocean Plastic Solutions Network at Imperial College London • Ocean Remedy •
Oceanographic Institute, Prince Albert I of Monaco Foundation • Okena Serviços Ambientais • Oliver Wyman • One Water • Open Systems Lab • Openbare Vlaamse Afval Maatschappij OVAM • Origin Materials • PA Consulting • PAC Worldwide • Paccor packaging solutions • Pack4Food •
PepsiCo • Pernod Ricard • PetStar • Philips • Pick n Pay • Pinguimom • Plant Based Products Council • Plant Chicago • Plastic Bank Recycling Corporation • Plastic Collective • Plastic Energy • Plastic Odyssey • Plasticos Compuestos S.A. • Plastics Forming Enterprises, LLC • Plastics Recyclers Europe • Poppelmann
Holding GmbH & Co. KG • POSITIV.A • Preserve • Prince Albert II of Monaco Foundation • Prof. Claudio Zara, Department of Finance, Bocconi University • Prof. Richard C. Thompson OBE • Professor Ioannis Ioannou • PROQUIMIA, S.A. • Provenance • PT Evogaia Karya Indonesia • Qualipac • Quantis • Ramani Narayan, MSU University Distinguished
Professor • Rathbone Greenbank Investments • Ravensbourne University London - Fashion Department • RB • Re-Poly, Evertrak, QRS • RecyclePoints • Recycling Technologies • Rediscovery Centre • RePack • Replenish Bottling LLC • rePurpose Global • RES Group • Reusable Packaging Association • Riversimple Movement Ltd • Robeco •
Robert Lochhead, Professor and Director Emeritus of Polymer Science • Rodenburg Biopolymers • Royal Society of Chemistry • rPlanet Earth • Rubicon Global • S Group • SAMBITO • Samsøe Samsøe • São Paulo City Hall • Sarasin & Partners • SC Johnson • Schneider Electric • School of Management - Politecnico di Milano • Schwarz Group
(Lidl & Kaufland) • Scottish Government • Sealed Air Corporation • Searious Business • Selfridges • Serioplast Global Services Spa • Shanghai Rendu Ocean NPO Development Center • SHAPES IN THE SAND • Sidel • Silgan Plastics • SIRQLR • Sistema B International • Sky Group • Skyroom London Ltd • Smart Waste Portugal - Business
Development Network • Solid Waste Association of North America • SONAE MC • Sostenibilidad 3Rs&Es • South Pole • Spadel • SPB • Spinlock • Splosh Ltd. • Stanley Black & Decker • Stella McCartney • Stora Enso • Suez • Superdry Plc • SUST4IN • Sustainable Business Network • Sustainalytics • Svensk Plastindustriförening (SPIF) • SWANIA •
Swire Coca-Cola Ltd • SYSTEMIQ • Taiwan Circular Economy Network (循環台灣基金會) • Target Corporation • Target Australia Limited • TC Transcontinental • Termoencogibles, SA de CV • TerraCycle • Tetra Pak • The Association of Plastic Recyclers • The Better Packaging Co. • The Bio-D Company Ltd • The City of Copenhagen • The City of
Ljubljana, Slovenia • The Clorox Company • The Club of Rome • The Coca-Cola Company • The Consumer Goods Forum • The Eric and Wendy Schmidt Fund for Strategic Innovation • The Faculty of Entrepreneurship & Innovation - VIA University College • The Finnish Innovation Fund SITRA • The Global Environment Facility • The Government of
France • The Government of the United Kingdom • The Grameen Creative Lab • The Green Earth • The Institute for the Study of Science and Technology, National University of Quilmes (IESCT-UNQ) of Argentina • The Make-Cup Brand Make-Cup Concepts LLC. • The Ocean Race • The Recycling Partnership • The Renewal Workshop • The RSA •
The Walloon Government • Think Beyond Plastic • Tipa-Corp • TOMRA Systems ASA • Topolytics • TriCiclos • Trillium Asset Management • Tupack Verpackungen Gesellschaft m.b.H • Tupperware • UCL • Ultra Capital • Uncover Skincare BV • Unilever • Universidade de Trás-os-Montes e Alto Douro • Universiteit Gent • University of Edinburgh •
University of Northumbria, Newcastle • University of Portsmouth • UPM Raflatac • Upp! UpCycling Plastic BV • ValGroup • Veolia • Verstraete in mould labels • Vert Asset Management • Vita BioEnergia ltda • Walmart Inc. • Warner Babcock Institute for Green Chemistry • Waste Ventures India Pvt. Ltd. • Waste4Change • Water Unite •
Werner & Mertz GmbH • Woolworths Holdings Limited • World Economic Forum • Worn Again Technologies • WPP • WRAP • Wraptie International Ltd. • World Wildlife Fund (WWF) • Xiamen Luhai Pro-environment Inc. • Zero Waste Shop Moscow • Zespri Group Limited • Zevin Asset Management • ZigZag Global • π^3= Plastic Pollution Prevention



3.1 ELIMINATION OF PROBLEMATIC OR UNNECESSARY PLASTIC PACKAGING

Elimination of problematic or unnecessary plastic packaging through redesign, innovation, and new delivery models is a priority. While plastic brings many benefits, there are some problematic items on the market that need to be eliminated to achieve a circular economy, and sometimes plastic packaging can be avoided altogether while maintaining utility.

NEW PLASTICS ECONOMY VISION:
Elimination of problematic or unnecessary plastic packaging through redesign, innovation, and new delivery models is a priority.

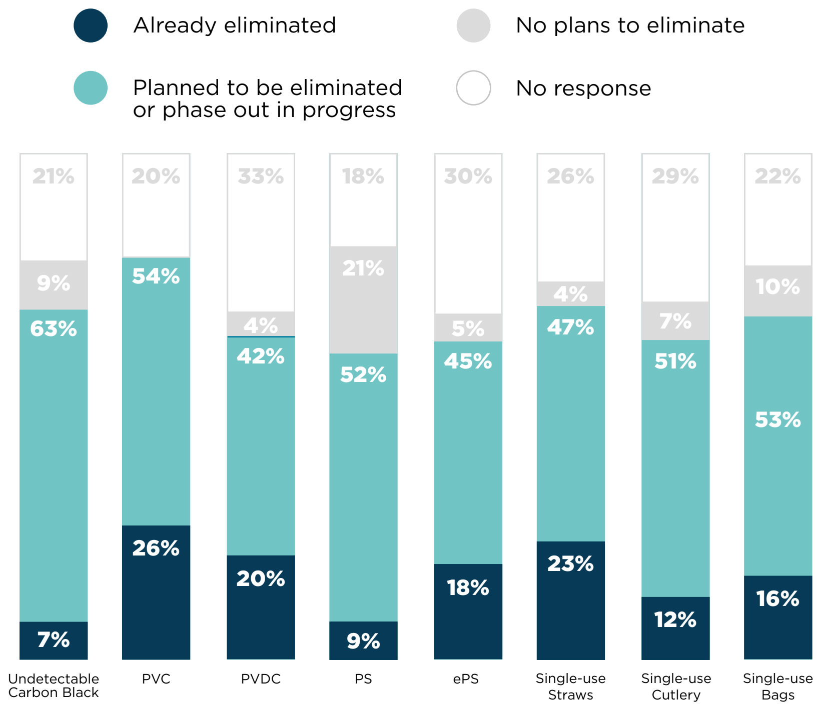
Elimination of the most commonly identified problematic plastic packaging categories is happening at scale.[22]

Approximately 60% of packaged goods companies, retailers, and packaging producers that have, or have had, PS, ePS or PVDC in their portfolio, have eliminated or have concrete plans to phase out these materials from their portfolio.

For single-use straws, carrier bags and cutlery, and undetectable carbon black plastics, this is approaching 70%, while for PVC the proportion is as high as 79%.

ELIMINATION STATUS OF COMMONLY IDENTIFIED PROBLEMATIC CATEGORIES OF PLASTIC PACKAGING

The percentage of signatories that have eliminated or plan to eliminate these items (excluding those that never had them in their portfolio)



These figures illustrate that these items are widely identified as problematic and that phasing them out is not only possible but is gradually becoming the norm in the industry.

This will result in a significant reduction in the volumes of these items or materials. For example:

- **Nestlé** Dolce Gusto will eliminate carbon black coffee capsules by Q1 2020, representing 8,000 tonnes annually.
- **Danone** will eliminate all PVC from its packaging by 2020, a reduction of 7,500 tonnes annually.
- **L'OCCITANE en Provence**'s planned removal of plastic in its European E-Commerce Box will eliminate 2,875 tonnes.
- **FrieslandCampina**'s replacement of single-use plastic straws will eliminate 1,250 tonnes.

Some businesses have set high-level targets to reduce plastic packaging across their entire portfolio. Retailers Lidl (part of **Schwarz Group**) and **Kesko** have committed to reduce their use of own-brand plastic packaging by 20% by 2025, while **Apple** has committed to eliminate all plastic packaging from its portfolio.

11 government signatories are implementing legal and/or fiscal measures to stimulate the phasing out of commonly identified problematic packaging or products. This includes measures to significantly reduce or eliminate:

- Single use plastic bags — 11 government signatories, including the **Government of the United Kingdom**, where the charge on single-use plastic bags led to an estimated 90% reduction in their use by the main retailers; the **Government of Chile**, which estimates that its ban on plastic bags prevented 2.2 billion plastic bags from entering the economy in its first year; and the **City of Austin, TX**, whose Zero Waste Business Rebate programme will provide rebates to qualifying businesses for replacing single-use plastic bags with paper or reusable bags.[23]

- Single use plastic straws — six government signatories, including the **Republic of Seychelles**, whose ban came into effect in July 2019, and the **Government of Chile**, which estimates its voluntary commitment and national campaign have prevented 18 million plastic straws a month from being placed on the market.[24]

- Expanded polystyrene (ePS) cups and trays — three government signatories, including the **Government of Grenada**, which has taken a phased approach to ban all styrofoam food containers, and the **Ministry of the Environment Peru**, whose Plastics Law, enacted in December 2018, imposed a nationwide ban on expanded polystyrene containers for food or drink products for human consumption, alongside other single-use plastic items such as straws, bags and tableware.[25]

There remains a significant opportunity for businesses to move beyond these commonly identified problematic items towards more fundamental, innovation-led elimination of packaging. A few signatories have started exploring innovation-led elimination, reducing the need for single-use plastic packaging through a fundamental rethinking of their approach to packaging. Examples include **Ahold Delhaize**'s use of dry-misting technology to keep fruit and vegetables fresh without the need for packaging and **Danone**'s launch of a new AQUA water bottle line without labels, where the logo is integrated into the bottle shape in Indonesia. Efforts like these will go beyond simple adjustments to packaging to consider redesign of elements of branding, supply chain, and even business models and products themselves.

3.2 MOVING FROM SINGLE-USE TO REUSE MODELS

The shift away from single-use plastics and towards reusable packaging is a critical part of the solution to eliminate plastic pollution. While improving recycling is crucial, we cannot recycle our way out of the plastic issues we currently face. Wherever relevant, reuse business models should be explored as a preferred option, reducing the need for single-use plastic packaging.
A framework to explore reuse opportunities, an outline of six major business benefits of reuse models, and 69 examples of reuse in action can be found in the Ellen MacArthur Foundation's REUSE book published in June 2019.

NEW PLASTICS ECONOMY VISION:
Reuse models are applied where relevant, reducing the need for single-use packaging

There is evidence of significant early stage activity around reuse. A large number of packaged goods companies, packaging producers, and retailers (43 companies, or 36% of the group) are currently engaged in testing and piloting reuse business models across different markets and product types. For example:

- **Loop**, a shopping platform by **TerraCycle**, launched pilot programmes providing collection logistics systems for reusable packaging in France and the US in May. The pilots have seen participation from some of the world's largest consumer goods companies and retailers, including at least 10 Global Commitment signatories who will deliver reuse and refill trials through the platform.
- By 2025, **Mars, Incorporated** aims to have launched 10 reuse pilots to test new business models in different geographies and with different brands.
- **L'Occitane en Provence** has calculated that implementation of refill systems will enable it to reduce its global plastic use by 10% by 2021.
- **RePack**, whose reusable and returnable delivery packaging service is available in 50 web-stores in more than 14 countries, launched a pilot in the US and Canada in July 2019.
- In Chile, **Unilever** is partnering with **Algramo** to pilot an app-powered, intelligent dispensing system that uses electric tricycles to deliver to people's homes free of charge. Shoppers buy reusable containers and create an online account, which manages credits for refilling and stores loyalty rewards for reusing packaging that can be recouped from the dispensing machines.

There are a number of examples of scaled reuse models, as well as reports of strong sales growth for current reuse offerings:

- In Brazil, **The Coca-Cola Company** invested USD 25 million to design reusable PET bottles and USD 400 million in expanding reuse infrastructure, to fulfill its aspiration to scale up reusable packaging to 50% by 2030 in Brazil, up from the current 20%.

- **PepsiCo** acquired SodaStream, an alternative delivery mechanism for sparkling water using reusable bottles, for USD 3.2 billion, which, through expansion of the business, should lead to an estimated 67 billion plastic bottles being avoided cumulatively through 2025.

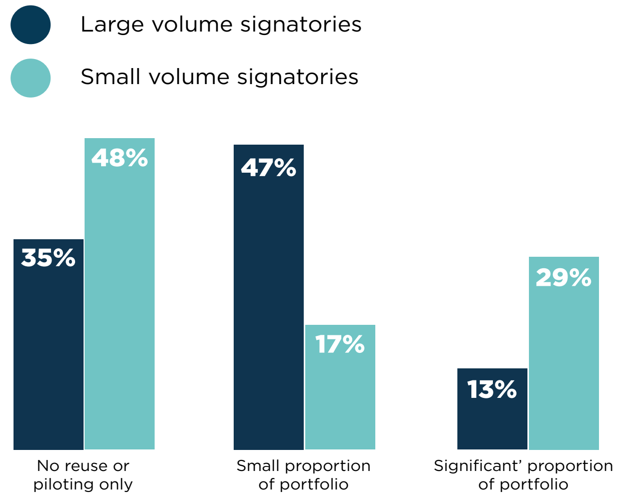
- **Danone** uses reusable containers and jugs to deliver its water, which constitutes approximately 50% of its plain water business volume.
- Packaging producer **Amcor's** sales of reusable and refillable PET containers in markets where refill programs exist have doubled in the last two years.
- **Bio D**, which offers its products in large sizes to allow retailers to set up refill stations, saw an increase of 52% in its refill sales in 2018.

A range of levers are being used by government signatories to drive change towards more reuse, including Extended Producer Responsibility legislation, funding for pilot schemes and public procurement policies, as well as public awareness campaigns.

- **The Government of Chile's** current draft EPR regulation incentivises reusable packaging by excluding it from the EPR obligation and allowing producers switching to reusable packaging to apply to receive a discount on the amount they will need to pay to Producer Responsibility Organisations.[26]
- **The Scottish Government** in the **United Kingdom** is working with Zero Waste Scotland to deliver a series of projects that eliminate single-use items and explore reuse models, with a total of up to GBP 500,000 available for pilot projects.
- **The Welsh Government** in the **United Kingdom** committed to becoming the World's first 'Refill Nation' in 2018. At the time, Wales only had two public water refill stations, it now has over 1,000 across Wales with schemes operating in many towns and cities.

Despite this progress, reuse models still represent a small part of the total packaged goods market today, and a significant untapped opportunity. The proportion of signatories' packaging reported to be reusable, by weight, is currently less than 3%. While this metric is far from perfect (see next point), it does indicate that reuse business models still represent a minor part of the total packaged goods market today. In addition, of all packaged goods companies, packaging producers, and retail and hospitality companies, just 21% (25 businesses) indicated they currently have reuse models in place across a 'significant proportion' of their portfolio — with the majority of these small companies and startups.[27] 36% of the group (43 businesses) reported that they are yet to start identifying reuse opportunities in their portfolio.

STAGE OF ENGAGEMENT WITH REUSE MODELS - PACKAGED GOODS COMPANIES, PACKAGING PRODUCERS AND RETAILERS
Percentage of signatories at each stage (most advanced stage reported)



There is currently no established industry-wide metric against which to measure progress on reuse. The metric of proportion of packaging, by weight, has severe limitations as it does not account for the fact that reusable packaging is used multiple times, and hence tends to underestimate the proportion of reuse models. Some signatories have made efforts to measure their progress or set concrete targets on reuse models — for example, through quantifying the numbers of pilots, share of units sold in reuse models, share of products for which refill options are offered, estimated single-use volumes avoided, or even through (virgin) plastic reduction targets with reuse as one of several levers to achieve these. To date there is no single metric that appropriately captures reuse adoption across a wide variety of businesses and product groups.

3.3 REUSABLE, RECYCLABLE OR COMPOSTABLE BY DESIGN

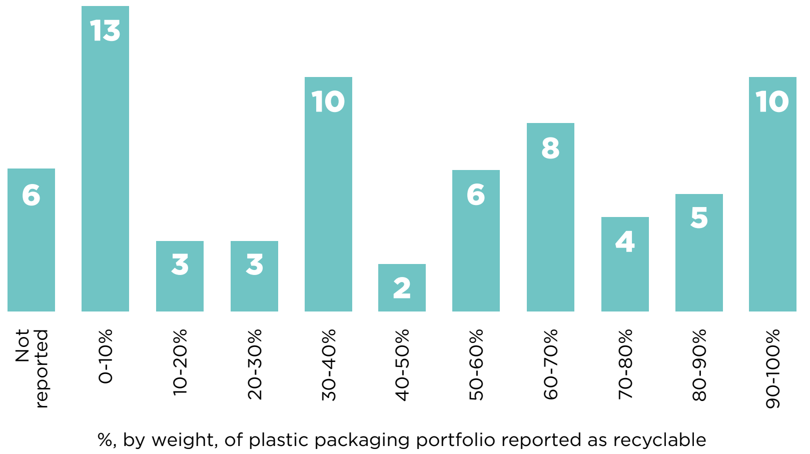
In a circular economy, every unit of packaging should be recyclable or compostable and, where possible, also reusable. Achieving this requires a combination of redesign and innovation in business models, materials, packaging design, and reprocessing technologies. Designing packaging to be reusable, recyclable or compostable (which is the focus of this section) is a crucial first step towards ensuring it is effectively reused, recycled or composted in practice (the focus of the next Section 3.4).

NEW PLASTICS ECONOMY VISION:
All plastic packaging is reusable, recyclable, or compostable by design

Based on current estimates, around 60% of signatories' plastic packaging, by weight, has been designed to meet the ambition of being reusable, recyclable or compostable in practice and at scale, with <3% reusable, ~60% recyclable and <1% compostable.[28] The current levels of reusable, recyclable or compostable plastic packaging vary widely across signatories. Companies with a large share of bottles in their portfolio tend to have significantly higher percentages than companies with mixed or more complex packaging portfolios. And in general, rigid plastic packaging is currently more recyclable than flexible plastic packaging.[29] The chart below illustrates the wide spread of recyclability percentages across the signatories.

SPREAD OF REPORTED RECYCLABILITY PERCENTAGES

Number of large* packaged goods companies, packaging producers, retailers and hospitality providers



**Excludes signatories reporting annual plastic packaging volumes less than 10,000 tonnes*

Assessing recyclability and compostability in the Global Commitment

The definitions used by Global Commitment signatories to assess what proportion of their portfolios are recyclable or compostable are more stringent than most other definitions. The signatories' commitment to 100% reusable, recyclable or compostable plastic packaging by 2025 is based on definitions that ask signatories to go beyond designing packaging for the technical possibility of recycling or composting, by asking that recycling or composting is proven to work 'in practice and at scale' for any given packaging design. The suggested thresholds to prove it works 'in practice and at scale' are: 30% recycling/composting rate achieved across multiple regions, collectively representing at least 400 million inhabitants.

The 'in practice and at scale' requirement results in some signatories reporting low or moderate recyclability percentages today. However, these definitions set a clear 2025 ambition level. Working towards this level of ambition and creating transparency on current recyclability percentages demonstrates the commitment of signatories to drive change at scale.

It should be noted that recyclability and compostability percentages reported as part of the Global Commitment are not comparable to assessments and claims of recyclability made elsewhere. They should therefore not be compared to any numbers previously published by signatories, or non-signatories, using different definitions. The definitions of recyclability and compostability used in the context of the Global Commitment are designed to be applied at a global level and are not linked to any specific geographical area, local context or regulations, or on-pack recyclability or compostability labels.

More detail is provided on the definitions used by Global Commitment signatories here.

Many signatories reported efforts to change the design of their packaging to increase recyclability. This has included replacing certain hard-to-recycle materials and formats, investing in research into alternatives, and introducing new packaging design guidelines. For example:

- **Carrefour** has partnered with Systeme U, **Veolia** and its own-brand product suppliers to find alternatives to non-recyclable packaging formats including biscuit sachets, triangle sandwich trays, and chips sachets, with the first pilots from this collaboration due to launch in early 2020.
- **Colgate-Palmolive Company** reported over 200 projects underway which are expected to transform its packaging portfolio in 2019 and 2020. These include transitioning from opaque to clear PET bottles, redesigning multi-material films and improving recyclability of dispensing systems.
- **Greiner AG** is evaluating the use of digital watermarks to help sorting plants detect its products.
- The **Nestlé** Institute of Packaging Sciences, which will employ around 50 people, opened in Switzerland in September 2019 and is collaborating with industrial partners to develop new packaging materials and solutions.
- To meet its commitment, **Albéa** has developed strategic product roadmaps for every product category and end-market. It also launched the Circular Beauty initiative, bringing together stakeholders to help define new rules for cosmetic packaging, to ensure the industry moves from ‘technically reusable or recyclable’ to ‘effectively reused or recycled’ packaging.

For packaging to be considered recyclable or compostable under the Global Commitment (see the ‘Assessing recyclability and compostability in the Global Commitment on page 35) it must be proven to work ‘in practice and at scale. This means that it will take time before some of these redesign efforts have an impact on the reported percentages. However, it is important to recognise these efforts as they are necessary steps to improve the percentages over time.

ESTIMATED PERCENTAGE OF PLASTIC PACKAGING WEIGHT REUSABLE, RECYCLABLE & COMPOSTSTABLE

~60%
reusable, recyclable or compostable today

<3% reusable
~60% recyclable
<1% compostable

The share of reusable packaging is at <3% of signatories’ volumes by weight placed on the market annually. For more detail on progress on reuse, see Section 3.2.

A very small proportion (<1%) of signatories’ plastic packaging has been reported to be compostable in practice and at scale. This is both because compostable plastic packaging is mainly used by signatories for targeted applications only, and because the definition of compostability used in the Global Commitment goes beyond meeting international compostability standards, to require proof that it will work in practice and at scale. Today, the infrastructure needed to effectively collect and compost these items at scale is not established in most places in the world.

Government signatories are taking forward proposals for legislation to incentivise the use of reusable, recyclable, or compostable plastic packaging through extending producer responsibility, invoking the 'polluter pays' principle. For example:

- The **Government of the United Kingdom** consulted in 2019 on a policy to extend producer responsibility for packaging, meaning that producers will pay the full net costs of managing packaging waste at end of life. A reformed system is expected to be operational in 2023.

- The **Ministry for the Environment New Zealand** is currently consulting on a proposal to set a framework for co-design of product stewardship schemes that would make producers responsible for specified problematic products, including packaging, at the end of life, with expectations that the schemes will be implemented in 2021.

The commitment of signatories to make all packaging reusable, recyclable or compostable by 2025 is a necessary first step, but equally it is not an end goal in itself. The target state to aim for is one in which all packaging, in all markets where it is sold, is actually reused, recycled or composted in practice. Signatories' efforts to help establish the necessary infrastructure to collect, sort, and effectively reuse, recycle or compost plastic packaging are described in the next series, 3.4.

3.4 REUSE, RECYCLING OR COMPOSTING IN PRACTICE

Designing all packaging to be reusable, recyclable or compostable (the focus of the previous section) is a necessary first step, but a circular economy is only realised if packaging is actually reused, recycled or composted in practice. Next to circular packaging design, this requires the necessary systems to be in place to collect, sort, and effectively reuse, recycle or compost the packaging. This section focuses on signatories' efforts and commitments to put these systems in place.

NEW PLASTICS ECONOMY VISION:
All plastic packaging is reused, recycled or composted in practice

Recycling signatories have committed to increasing their collective processing capacity by more than four times between now and 2025. For signatories with established recycling businesses, this translates to an estimated increase in recycling capacity of 3.0 million tonnes, up from 0.8 million to a total of 3.8 million tonnes.[30] In addition to this, plastic producers **Borealis** and **Indorama Ventures** have committed to increase recycled content in their products to 350,000 tonnes and at least 750,000 tonnes (a seven-fold increase) respectively, which will include significant increases in recycling capacity. Recycling solutions provider **Tomra** has set a target for its customers to sort more than 8 million tonnes of plastic annually with its sensor-based technology by 2025.

Signatories across different parts of the plastics value chain are investing in infrastructure to increase recycling capacity globally.

- **Suez** reported that in 2020 it will begin commissioning for a new 30,000-tonne capacity recycling plant in Thailand.
- Packaging producer **ValGroup** has reported substantial investments in its plants that will add more than 90,000 tonnes of recycling capacity annually across Brazil, Mexico, and Spain.
- As part of its USD 1.5 billion investment in growing its use of recycled content, plastic producer **Indorama Ventures** started, in 2019, the commercial production of 100% rPET pellets in Europe, with expectations that the initial annual capacity of 16,000 tonnes will be quickly exceeded as expansion/acquisition plans are developed.
- **Industria Mexicana de Reciclaje** has invested USD 1.5 million to improve its recycling facility.
- Kenya-based **Mr Green Africa** has invested USD 0.75 million in new machinery to boost local post-consumer recycled content take-off.

Innovation activity will improve the quality of output that can be achieved via mechanical recycling, including from mixed plastic waste streams. In 2019 **PetStar** gained a Cradle to Cradle certification for a recycled PET resin — the first PET recycled resin to achieve this — while **APK** is now focusing on scaling a technology which generates pure re-granulates, with a quality comparable to virgin plastics, from complex and mixed plastic waste streams that are typically incinerated or 'downcycled' today. **Veolia** has invested in research into how robotics, artificial intelligence and digitalisation can be incorporated into recycling tools to enable recycling of complex or mixed plastic.

Signatories are also exploring new technologies that drive improvements in sorting solutions. A notable milestone in this area is **Digimarc Corporation's** proof-of-concept for using digital watermarking for sorting plastics in mixed waste as part of Project HolyGrail.[31] **Tomra** is also investing in sorting solutions innovation, including using 'Sharp Eye' technology to improve sorting resolution and Laser Object Detection (LOD) to improve object recognition.

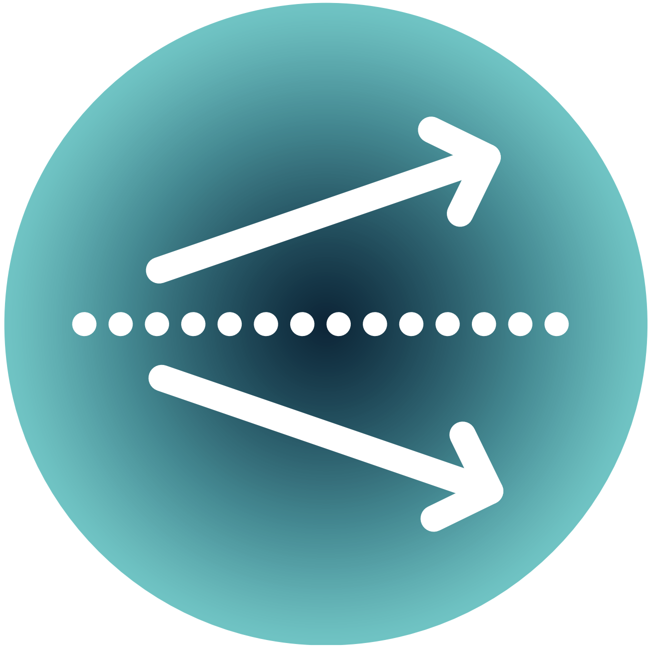
Some signatories are taking early steps to explore chemical recycling. On the demand side, this includes **Mars, Incorporated**, which, in 2019, launched a Chemical Recycling Taskforce to evaluate the viability of the technology achieving scale, alongside the environmental, social, and financial impact, and regulatory and food safety considerations. In addition, **Schneider Electric** is aiming to procure high-quality chemically recycled plastic for its electrical products. Developments on capacity growth were reported by **Plastic Energy**, which has signed agreements to build plants with capacity to process 20,000-25,000 tonnes of plastic annually. **Indorama Ventures** will, in 2019, begin manufacturing PET resin using chemically recycled monomers from post-consumer material with an initial annual capacity of 10,000 tonnes, and 'significant plans to expand this process' to be developed. **Recycling Technologies** is operating a pilot Beta Plant in the UK for R&D, training, and trialling the chemical processing of mixed plastic waste into feedstocks for new materials. Finally, in an Ellen MacArthur Foundation-facilitated collaborative project, Global Commitment signatories **Schneider Electric** and **UPM Raflatac**, together with other businesses, started to outline the principles of a mass balance based system to account for chemically recycled content, with the aim of informing the development of a rigorous, globally recognised standard.[32]

Through Plastics Pacts, several government signatories are collaborating with industry and other stakeholders to reach specific 2025 recycling rate targets. These represent significant increases on today's levels and an acceleration of progress compared to previous years. The **United Kingdom** Plastics Pact aims to effectively recycle

70% of all plastic packaging in the country by 2025. In France, they are aiming for 60% by 2022 and in **Chile** the aim is to be effectively recycling one third of plastic packaging by 2025.

Government signatories are also driving improvements in collection and recycling through investment in infrastructure and taking steps to implement deposit return schemes:

- The **Government of the United Kingdom** is investing around GBP 2.9 billion to support local infrastructure for waste collection and recycling through public-private finance initiatives. It will be introducing deposit return schemes for single-use drinks containers that will reward people for bringing back their bottles. A consultation on proposals was launched earlier in 2019.
- The **Walloon Government** in Belgium reported that by 2021 six new recycling plants will be created in its region with the capacity to recycle more than 150,000 tonnes of plastic per year and involving a EUR 120 million investment.
- In July 2019, the **Ministry for the Environment New Zealand** announced NZD 3 million investment for an infrastructure project that will provide further capability for reprocessing of PET plastic into 100% rPET food-grade packaging.
- **The Scottish Government** in the **United Kingdom** is aiming to introduce a deposit return scheme for drinks containers in 2021 and reported an investment of GBP 1.7 million in Project Beacon for a recycling plant capable of recycling all plastic types, which should be operational in 2020.
- The **Ministry of Environment and Energy Transition of Portugal** has set a target of a 90% collection rate of PET bottles by 2025 and is preparing government-level support for a move towards deposit return schemes and a related pilot programme.
- A pilot project run by the **Government of Catalonia** in Spain has looked to eliminate single-use plastic bags in an entire city by making compostable and reusable bags available instead, with the ultimate goal of enhancing the quality and quantity of compost. Five months after launching the project, the share of compostable bags in the local composting plant had increased from 20% to 60%, and the resulting compost was rated as class A, suitable for organic farming.



3.5 DECOUPLING FROM THE CONSUMPTION OF FINITE RESOURCES

Moving towards a circular economy for plastic packaging includes, over time, decoupling from finite (fossil) resources. This is achieved first and foremost by drastically reducing the need for virgin plastics through dematerialisation, reuse, and use of recycled content, and then, over time, by switching any remaining virgin inputs to renewable feedstocks that are proven to come from responsibly managed sources and to be environmentally beneficial.

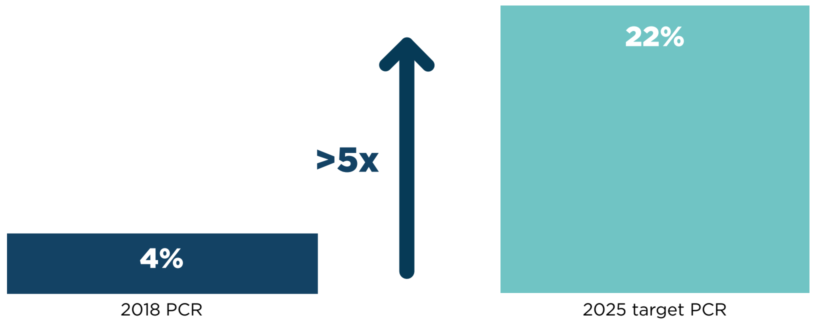
NEW PLASTICS ECONOMY VISION:
The use of plastic is fully decoupled from the consumption of finite resources

Major global businesses have started to set explicit targets to reduce their use of virgin plastics in absolute terms. **Unilever** and **Mars, Incoporated** announced targets to reduce, by 2025, their usage of virgin plastics in their packaging by 50% and 25% respectively versus today's tonnages, with **PepsiCo** doing the same for its beverage business (20%). These reductions will in general be achieved through a dual strategy combining both elimination of the plastics we don't need through innovation and reuse, and increasing recycled content for those plastics we do need. **Unilever** made this dual strategy explicit, by setting a target to reduce its overall use of plastic packaging by more than 100,000 tonnes by 2025 through, among other strategies, reuse, refill, and packaging-free solutions, with the remaining virgin reduction to be achieved through the increased use of recycled content. Retailers Lidl (part of **Schwarz Group**) and **Kesko** combine a commitment to reduce their use of own-brand plastic packaging by 20% by 2025 with a recycled content target. **Apple** has committed to fully eliminate all plastic packaging from its portfolio. While all Global Commitment signatories have targets on recycled content (see below), and committed to take action on elimination and reuse, so far few have quantitative targets to reduce (virgin) plastic packaging in absolute terms.

The 2025 recycled content targets of signatories are a major step up compared with their current baseline and the global average. Packaged goods companies and retailers are targeting an average of 22% post-consumer recycled content — five times their current average of 4.4% and ten times the estimated global average. Plastic packaging producer signatories have committed to increase their recycled content from 6.8% to 18% by 2025.

Some packaged goods companies and packaging producers are going further, with 51 businesses having set targets of 30% or more, including large players such as **Diageo**, **Excelrise, FrieslandCampina**, **Greco & Guerreiro**, **Innocent Drinks**, **L'Occitane en Provence**, **L'Oréal**, **Logoplaste**, **Marks and Spencer Plc**, **Mars, Incorporated**, **Natura Cosmetics**, **Paccor Packaging Solutions**, **Termoencogibles SA de CV** and **Woolworths Holding Limited**. And including **Werner & Mertz**, **rPlanet Earth** and **IWC Schaffhausen** committed to achieving 100% recycled content.

POST-CONSUMER RECYCLED (PCR) CONTENT IN PACKAGING
Weighted average of packaged goods company and retailer signatories



The total demand for recycled content by brand, retailer, and packaging producer signatories in 2025 is projected to exceed 5 million tonnes, an increase of more than 3.6 million tonnes from their 2018 baseline. This combined commitment, unprecedented in its ambition to recycle plastic back into plastic packaging, provides a clear demand signal for increased investment in high-quality recycling. In addition, this projected total demand is equivalent to keeping 25 million barrels of oil in the ground every year. The greenhouse gas emissions avoided by using this quantity of recycled instead of virgin plastics are equivalent to permanently removing 1.7 million cars from the road.

Leading plastic producers are also committing to shift from a business model exclusively based on the extraction of finite resources to one based on the circulation of resources. **Borealis** and **Indorama Ventures** have committed to increase their recycled content volumes to 350,000 tonnes and at least 750,000 tonnes (a seven-fold increase) respectively. **Indorama Ventures** recently pledged USD 1.5 billion of investment towards achieving this target.

Progress towards recycled content targets is being made. Based on a group of 52 companies that opted to report both latest and prior year data on their incorporation of post-consumer recycled content, the percentage of recycled content increased by an average of 23%, from 5.0% to 6.1%, between 2017 and 2018.[33]

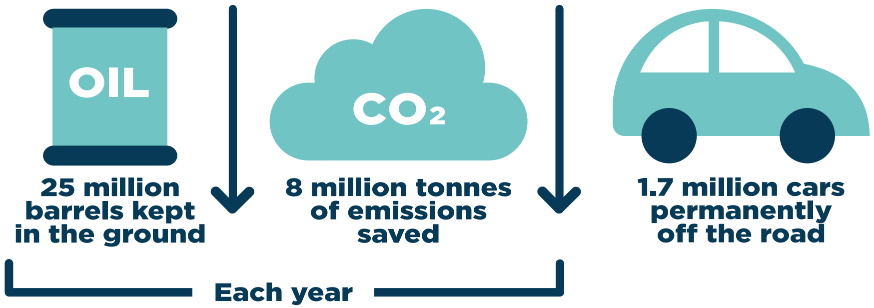
The use of recycled content is also being stimulated by governments. This includes the implementation of post-consumer recycled content minimum thresholds and EPR regulation:[34]

- The **Government of the United Kingdom** will be introducing a tax on plastic packaging that contains less than 30% recycled content from April 2022.
- The **Government of Chile**'s EPR packaging regulation mandates that the incorporation of recycled material in packaging should be taken into consideration to modulate the tariff that the Producer Responsibility Organisations (PROs) charge to producers.
- The region of **Government of Catalonia** in Spain has established specific subsidy calls to help the industry to increase consumption of recycled materials, through research and innovation projects that are partly funded by landfill and incineration taxes for municipal and industrial waste.

Compostable plastic producers are also decoupling from finite resources, reporting an average of 62% renewable content used, and an average of 42% of renewable content from responsibly managed sources.[35] Companies such as **NatureWorks** produce bio-based plastics using 100% renewable feedstock. The renewable sources used by compostable plastic producers include: side streams from the potato chips industry and fibres from agricultural side streams (**Rodenburg Biopolymers**); mixed organic waste materials (**Full Cycle Bioplastics**); and a combination of lignin (a byproduct of the paper and biofuel industry) and other bio-based and/or biodegradable co-polymers (**Mobius**).

70 packaged goods companies and retailers opted to report renewable content in their plastic packaging to the Ellen MacArthur Foundation, reporting an average of 1% renewable content, amounting to around 240,000 tonnes. In an effort to decouple its material sourcing from finite resources **L'Oréal** has set itself the ambition to ensure that 50% of its plastic packaging will not be made from virgin fossil-based plastics by 2025, by exploring the use of renewable content on top of its 40% post-consumer recycled content target by 2025.

Over **5 million tonnes** of demand for recycled content by 2025 — equivalent to:



3.6 TRANSPARENCY

Promoting transparency on signatories' commitments, as well as the actions they take and their progress towards achieving them, sits at the heart of the Global Commitment. This is achieved not just through the public disclosure of targets and progress towards them — both qualitative and quantitative — but also through providing common definitions and clear and consistent presentations of data.

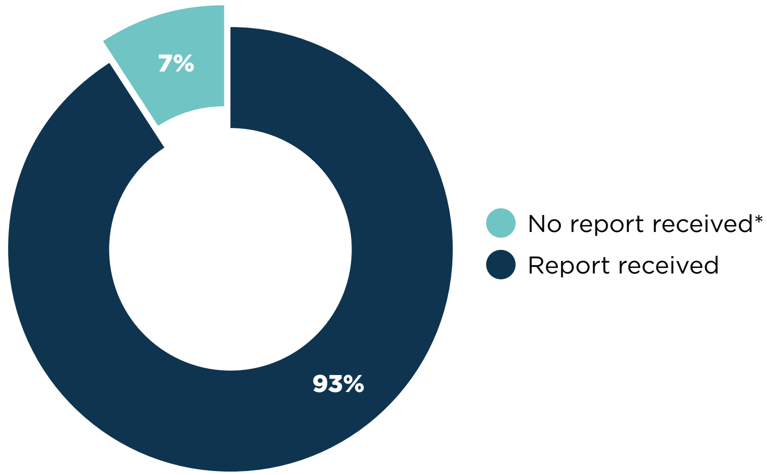
This report sets a clear baseline for measuring progress towards a circular economy for plastics. In this report, for the first time, 176 businesses across the value chain (93% of the 189 eligible to report) and 14 governments (88% of the 16 invited to report) have disclosed progress against published targets to help build a circular economy for plastics based on a common commitment framework, using common definitions, and working towards a common vision.[36] As the first progress report, it provides transparency on initial actions signatories have taken against their commitments and sets a quantitative baseline against which progress can be measured over the period until 2025.

New quantitative metrics on plastics usage are being reported across the group for the first time, including the percentage of plastic packaging volumes that are reusable, recyclable or compostable, and the percentage of post-consumer recycled content used in plastic packaging.[37]

In particular, the Global Commitment reporting process is driving greater transparency on recyclability and compostability of plastic packaging by using definitions that go beyond mere technical possibility of recycling or composting and asking for recyclability and compostability to be proven to work in practice and at scale. For more detailed insights on transparency on recyclability and compostability, see Section 3.3.

Signing up to the Global Commitment has led many signatories to assess how much, and what sort of, plastic packaging they use for the first time. While a number of more advanced signatories have had a clear picture of the breakdown of their plastic packaging usage for some time, a large proportion have not historically tracked the quantity and types of plastics used in their packaging across their entire portfolio. This process has driven important transparency and understanding of plastics usage within these organisations internally, and has stimulated and informed the development of new and concrete plans, roadmaps, and innovation agendas aimed at meeting the 2025 targets. For example, **Nestlé** and **L'Occitane** have published a list of materials they plan to eliminate and by when.

PROPORTION OF SIGNATORIES REPORTING
% of government and business signatories eligible to report



No report had been received at the time of publication of this report

On top of reporting on progress and actions, 29% of packaged goods companies, packaging producers, and retailers and hospitality providers reporting (34 in total) have created transparency on their plastic usage by disclosing their total plastic packaging volumes in metric tonnes. Jointly, they reported annual volumes of plastic packaging in excess of 9 million metric tonnes.

Some signatories have gone further on disclosure by creating transparency on their plastics footprint beyond total volumes.[38] **Danone** published a split of its packaging portfolio by material and packaging type, **Nestlé** published a split by polymer type, and **The Coca-Cola Company** provided transparency on the number of units they sell.

PART 1: ENDNOTES

1 Business signatories that joined the Global Commitment after 1st June 2019 were not asked to report. Progress reports were not received at the time of completion of this 2019 progress report from 7% of the business signatories eligible to report, representing <1% of total plastic packaging volumes: Biopac UK Ltd; CupClub Limited; Ecopod; PT Evogaia Karya Indonesia; Fifth Season Ventures; LLUK; MIWA (MInimum WAste); Vita BioEnergia Ltda; Re-Poly, Evertrak, QRS; RecyclePoints; Riversimple Movement Ltd; Splosh Ltd; and Worn Again Technologies.

2 Government signatories that joined the Global Commitment after 1st June 2019 were not asked to report. Progress reports from signatories Government of France and the City of Copenhagen were not received at the time of completion of this 2019 progress report.

3 Larger signatories are in this case defined as those producing or using volumes of plastic packaging in excess of 10,000 tonnes per year.

4 More information on the definitions for reusable, recyclable and compostable used in the Global Commitment is provided in the Glossary and in Section 3.3.

5 The United Kingdom Plastics Pact aims to effectively recycle 70% of all plastic packaging in the country by 2025, in France, they are aiming for 60% by 2022 and in Chile the aim is to be effectively recycling one-third of plastic packaging by 2025.

6 Signatories with established recycling businesses will increase their collective recycling capacity by 3.0 million tonnes, up from 0.8 million to a total of 3.8 million tonnes. ‘Established’ recycling businesses refers to those who reported a current recycling capacity of at least 50 tonnes per annum.

7 Closed-loop recycling for plastic packaging estimated at 2%. Source: Ellen MacArthur Foundation, *The New Plastics Economy: Rethinking the future of plastics*, 2016.

8 Weighted average based on a group of 23 businesses that as well as the 2018 percentage also reported the 2017 percentage.

9 Producing 1 tonne of recycled plastic saves five barrels of petroleum and the equivalent of 1.6 tonnes of CO2. Source: Suez, https://www.suez.com/en/our-offering/businesses/what-are-you-looking-for/resources-management-consulting/introduce-more-recycled-plastics-into-your-production

10 Based on an average net CO2 saving from recycling plastic of 1.5 tonnes CO2 equivalent per tonne. Sources: Suez website (2019), www.suez.com; WRAP, *Realising the value of recovered plastics, market situation report*, 2007.

11 Only signatories that joined the Global Commitment before 1st June 2019 have been invited to submit data for this report.

12 See Section 2 for more information on signatories.

13 As a result of the timing of the reporting cycle, the majority of reports provided by signatories for this report cover one year of quantitative data for 2018 (prior to their participation in the Global Commitment).

14 More details on the rankings used are provided on the following page.

15 Walmart Inc., Schwarz Group, Carrefour, Target, and Ahold Delhaize are signatories of the Global Commitment.

16 Veolia and Suez are signatories of the Global Commitment.

17 Nestlé, Pepsico, Unilever, The Coca-Cola Company, L’Oréal, and Mars, Incorporated are signatories of the Global Commitment.

18 Amcor, Sealed Air Corporation, ALPLA Group, Aptargroup Inc., and Berry Global are signatories of the Global Commitment, and through recent acquisitions by Berry Global and Amcor, RPC Group and Bemis are also included.

19 The full list of government signatories can be found in the appendix of this report. Government signatories that joined the Global Commitment after 1st June 2019 were not asked to report. Progress reports from government signatories France and the city of Copenhagen were not received at the time of completion of this 2019 progress report.

20 More information about the Plastics Pact is available at: https://newplasticseconomy.org/projects/plastics-pact

21 The Global Commitment open letter can be read at: https://newplasticseconomy.org/about/open-letter

22 The percentages that follow are based on the conservative assumption that all signatories that did not respond do have these items in their portfolio.

23 The full list of governments who reported measures on single-use plastic bags is: City of Austin, TX, US; Environment Department, Ministry of Environment, Energy and Climate Change, Republic of Seychelles; Government of Chile; Government of Grenada; Government of Rwanda; Ministry for the Environment New Zealand; Ministry of Environment and Energy Transition of Portugal, Ministry of the Environment Peru; the Scottish Government; the Walloon Government; and the Government of the United Kingdom.

24 The full list of governments who reported measures on single-use plastic straws is: City of Austin, TX, US; Government of Chile; Environment Department, Ministry of Environment, Energy and Climate Change, Republic of Seychelles; São Paulo City Hall; Ministry of the Environment Peru; and the Government of the United Kingdom.

25 The full list of governments who reported measures on ePS cups and trays is: City of Austin, TX, US; Government of Grenada; and Ministry of the Environment Peru.

26 The final regulation is expected to be approved in 2019.

27 Of the 25 companies with reuse models in place across a ‘significant proportion’ of their portfolio, only seven use/produce relatively high volumes of plastic packaging (>10,000 tonnes annually), while 14 (58%) use/produce only a small amount of plastic packaging (<1,000 tonnes annually).

28 Signatories were given the option to postpone public reporting on recyclability and compostability percentages. This recognises the significant time and effort required to assess entire plastic packaging portfolios against these definitions for the first time. Nearly all signatories have confidentially submitted their initial calculation of percentages to the Foundation, and some have opted to publish these percentages in this report. The publication of final percentages for all signatories will happen, for the first time, in 2020, once signatories have been given time to refine and revise their initial calculations. As a result of this, the aggregate percentages provided in this report should be considered interim estimates.

29 Given the weight of rigid plastic packaging compared to flexible packaging, the overall percentage that is recyclable could be expected to be significantly lower on a percentage of units basis.

30 ‘Established’ recycling businesses refers to those who reported a current recycling capacity of at least 50 tonnes per annum.

31 A cross value chain collaboration project under the Ellen MacArthur Foundation's New Plastics Economy initiative: https://www.newplasticseconomy.org/assets/doc/Holy-Grail.pdf

32 The 'Co.Project' of the Ellen MacArthur Foundation's CE100 Network's paper proposing a mass balance approach can be read here: https://www.ellenmacarthurfoundation.org/assets/downloads/Mass-Balance-White-Paper.pdf

33 Weighted average.

34 Extended Producer Responsibility. See the Glossary for a definition.

35 In order to avoid unintended consequences it is important to ensure that for all renewable feedstock responsible sourcing and regenerative agricultural principles are applied (taking into account the impacts of the agricultural processes, including land use, and any impact on food security and biodiversity). To the Foundation's knowledge, at the date of publication, no comprehensive and widely accepted definition, standard or certification scheme for responsibly managed sources exists. As a result of this, signatories reporting against commitments on renewable content from responsibly managed sources used their own definitions and were asked to report how they determined which of their feedstocks are from responsibly managed sources. The development of a comprehensive and widely accepted definition, standard or certification scheme for responsible management is encouraged to ensure a clear framework for related commitments and actions.

36 Business signatories that joined the Global Commitment after 1st June 2019 were not asked to report. Progress reports were not received at the time of completion of this 2019 progress report from 13 (7%) of the business signatories eligible to report, representing <1% of total volumes: Biopac UK Ltd; CupClub Limited; Ecopod; PT Evogaia Karya Indonesia; Fifth Season Ventures; LLUK; MIWA (MInimum WAste); Vita BioEnergia ltda; Re-Poly, Evertrak, QRS; RecyclePoints; Riversimple Movement Ltd; Splosh Ltd; and Worn Again Technologies. Government signatories that joined the Global Commitment after 1 June 2019 were not asked to report. Progress reports from government signatories France and the city of Copenhagen were not received at the time of completion of this 2019 progress report.

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38 Links to this additional data are provided in these signatories' individual reports in Part 2 of this report.