FLEXIBLE PLASTIC
CONSUMPTION AND RECOVERY

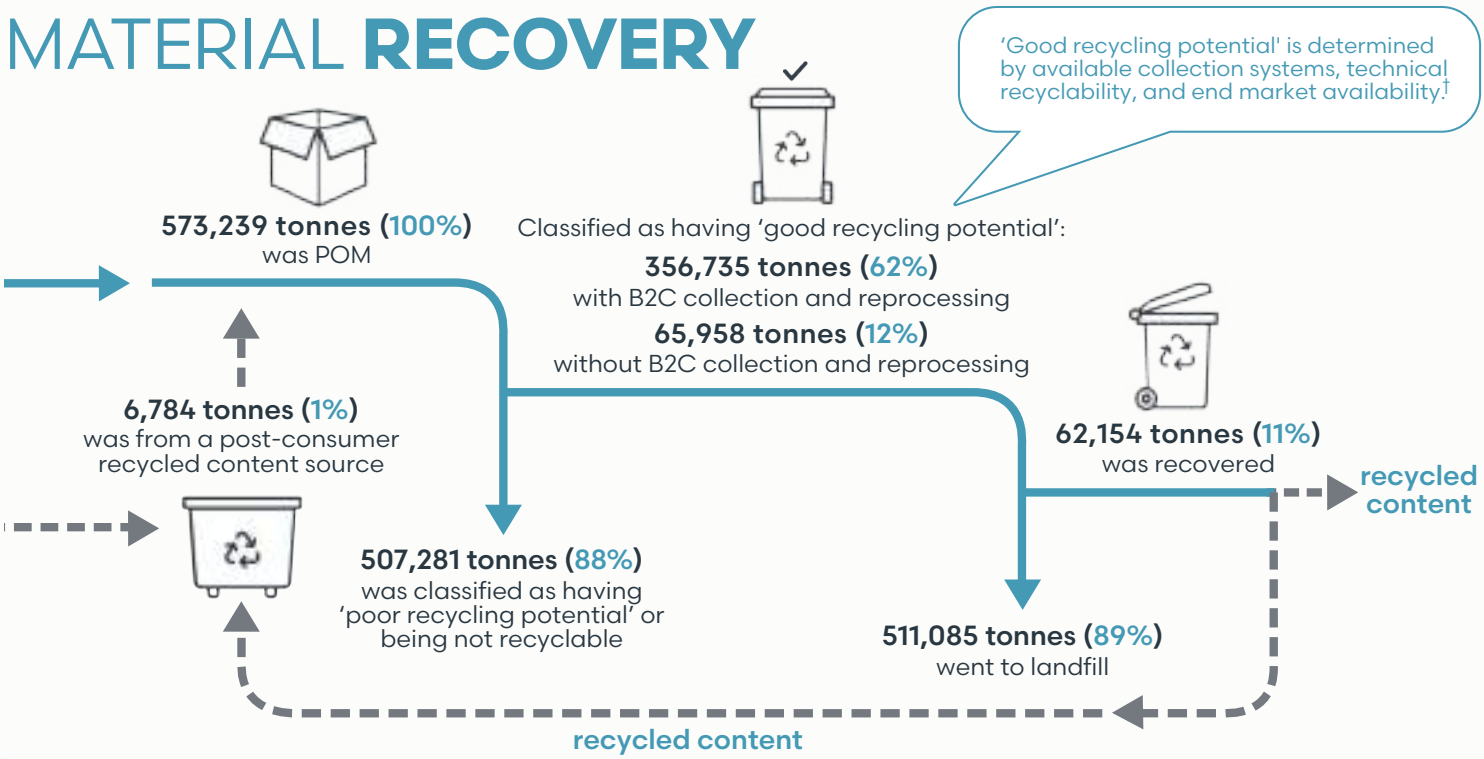
2021-22 Fact Sheet

Version 1: March 2024

SUMMARY
FLEXIBLE PLASTIC

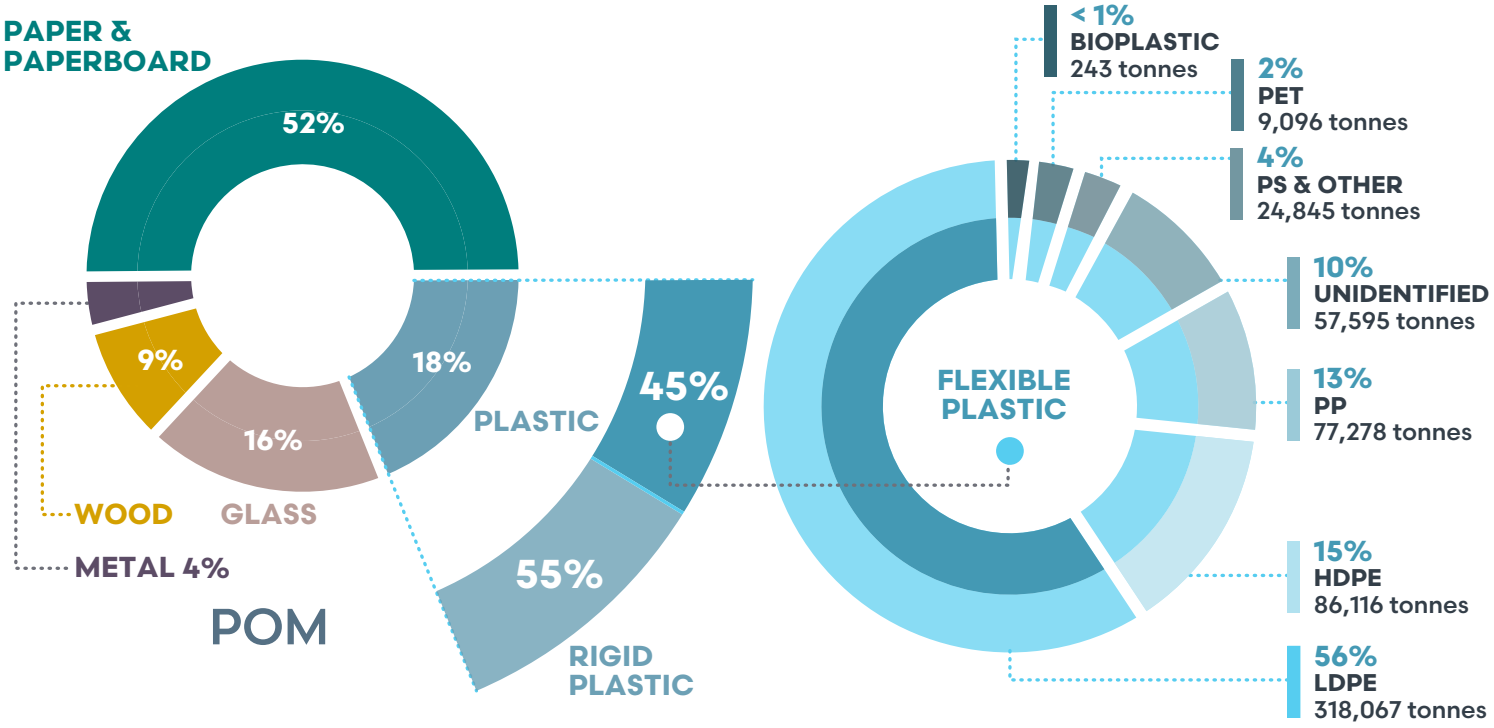
- 8.2% of packaging placed on market (POM) was flexible plastic, representing 573,239 tonnes. Business-to-consumer (B2C) packaging represents almost three-quarters (70%) of all flexible plastic packaging POM. POM continues to increase per capita.
- Due to a global lack of availability of quality recycled content, including food grade standard, flexible plastic packaging POM was made from 98% virgin materials, 1% pre-consumer recycled materials and 1% post-consumer recycled materials.
- During FY21-22 APCO tightened recyclability design standards for B2C flexible packaging aligning with the European CEFLEX design guidelines. The industry is aligning to the revised B2C guidelines with major packaging manufacturers reporting design for recyclability rates of up to 90%. Recent audits indicate B2C packaging in the market is 85% recyclable in FY24.
- Due to the re-classification of flexible packaging previously collected through the REDcycle program, flexible plastic's good recycling potential score fell from 76% in 2020-21 to 12% in 2021-22. This reflects an extraordinary industry event, where collection and reprocessing facilities became unavailable despite the technical recyclability of this material. If that material had not been reclassified then 'Good recycling potential' of flexible plastic would have been 62%.
- Less flexible plastic packaging is recovered when compared to rigid plastics. While flexible plastics make up 45% of all plastic packaging POM, they represent only 24% of all plastic packaging recovered. This gives flexible plastic packaging the lowest recovery rate for any material category, at just 11% or 62,154 tonnes.
- Low domestic reprocessing capacity limits the uptake of domestic recycled content in new flexible plastic packaging placed on market. There is a need to support both packaging-to-packaging and other end markets to boost the demand for this recycled content through the system. This will require a range of reprocessing technologies, capable of dealing with the inherent complexities of flexible packaging recovery.
- The prevalence of problematic and unnecessary single-use plastics has continued to decline, with the largest changes in single-use HDPE shopping bags and oxo-degradable plastics largely eliminated through single-use plastics bans across the country.
- Designing for recovery, increasing collection pathways, increasing reprocessing capacity and developing deep and resilient end markets will be key to driving improvement through to 2024-25.

MATERIAL **RECOVERY**

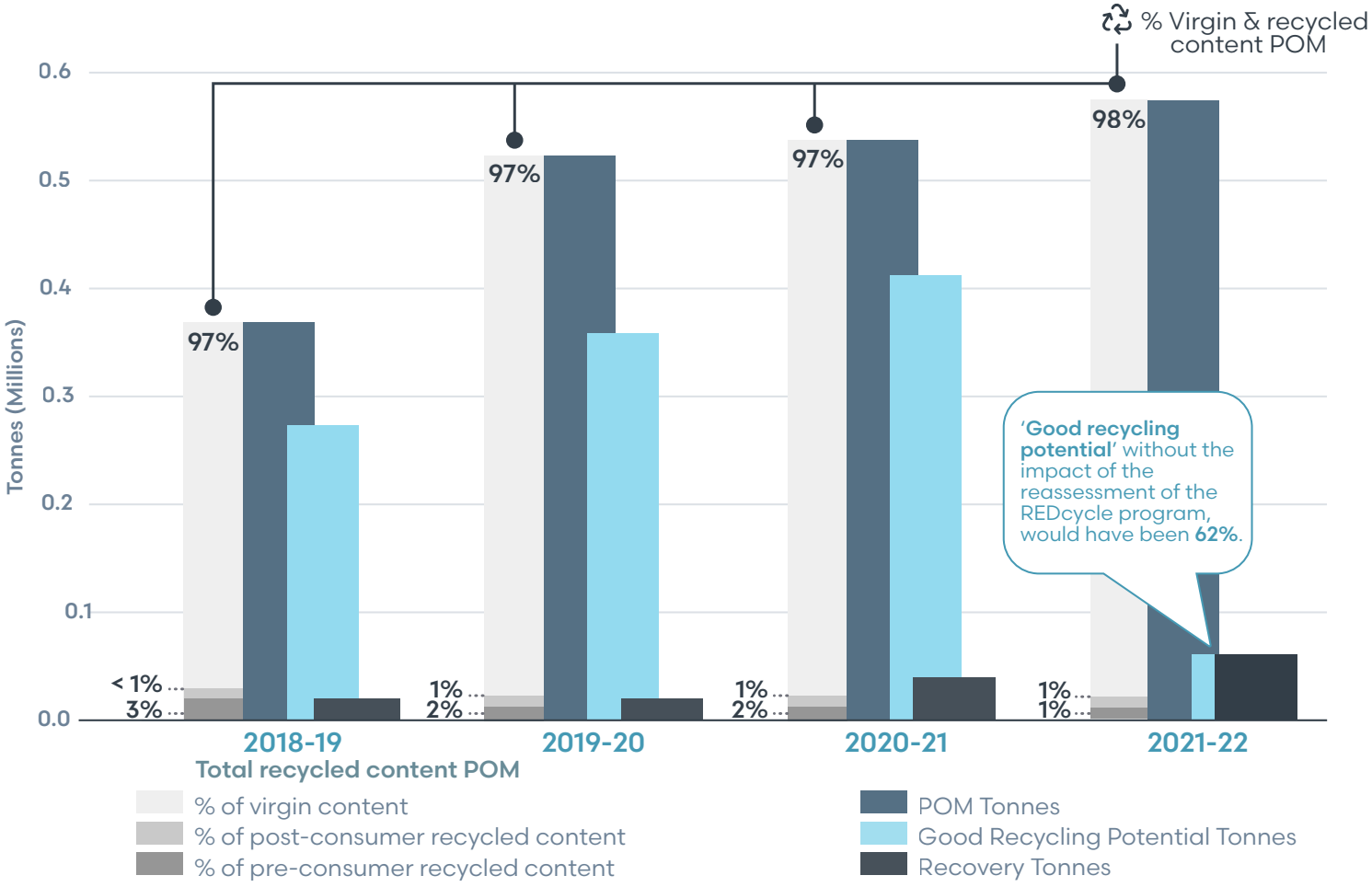


† Further explanation available on 'good recycling potential' here.

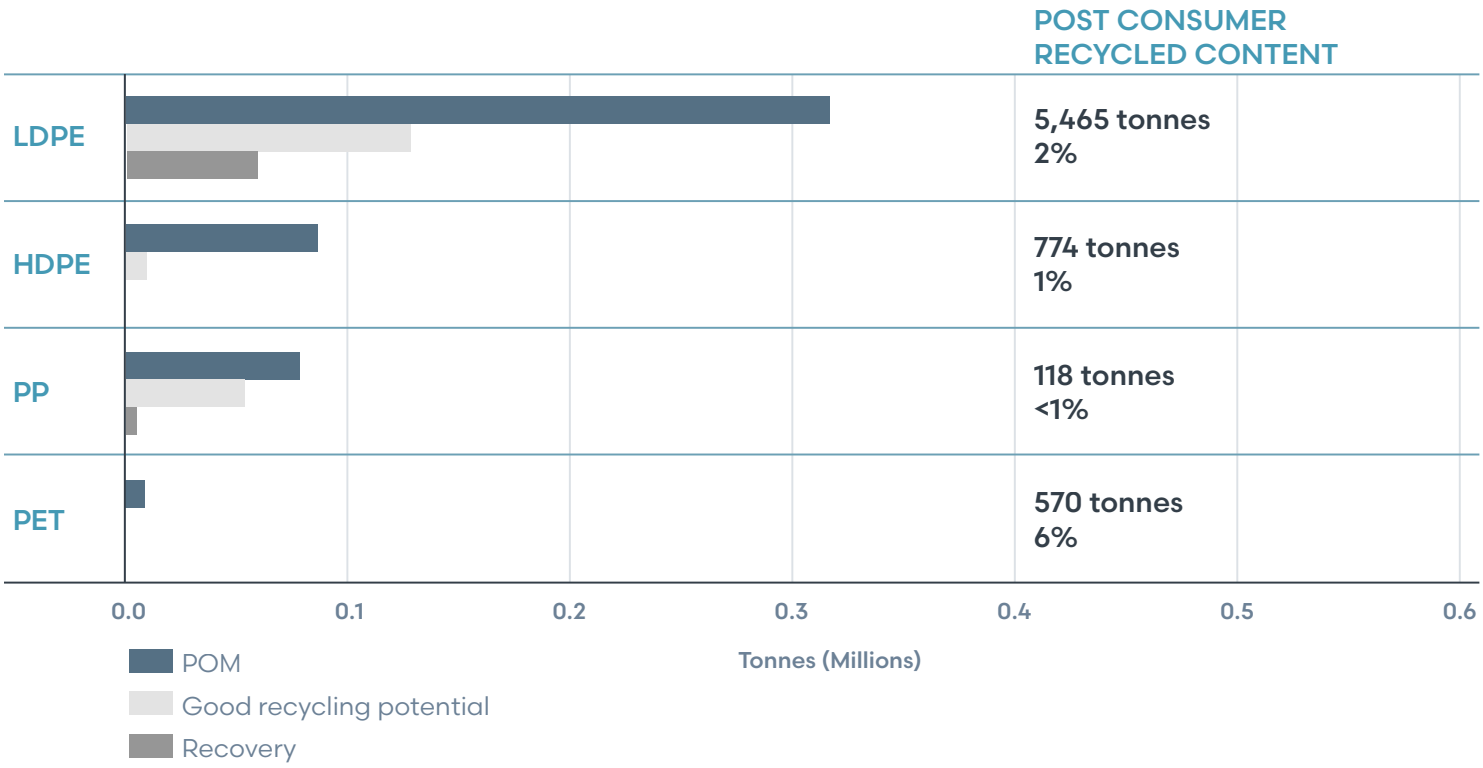
PLACED ON MARKET
FLEXIBLE PLASTIC



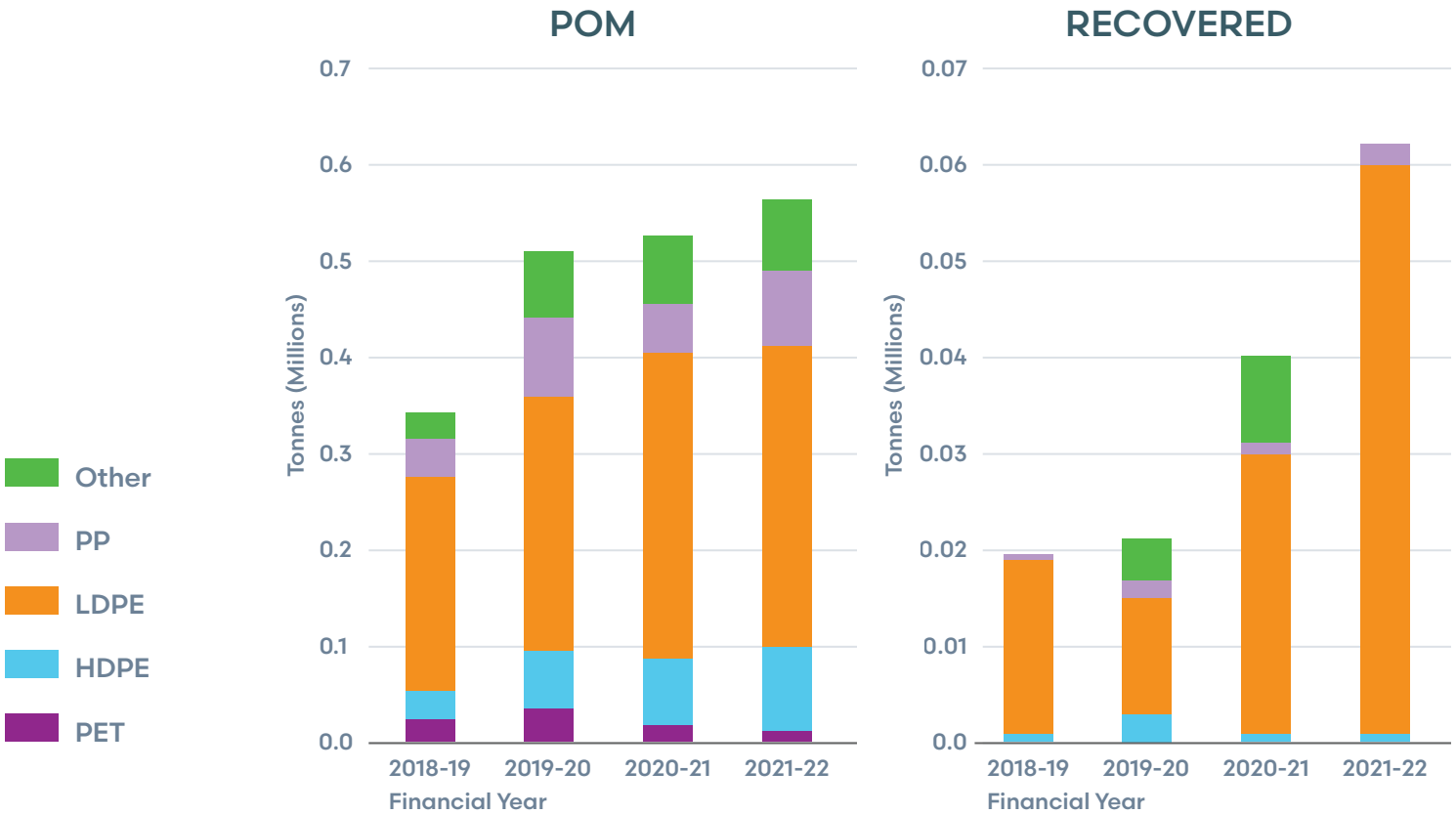
TRENDS



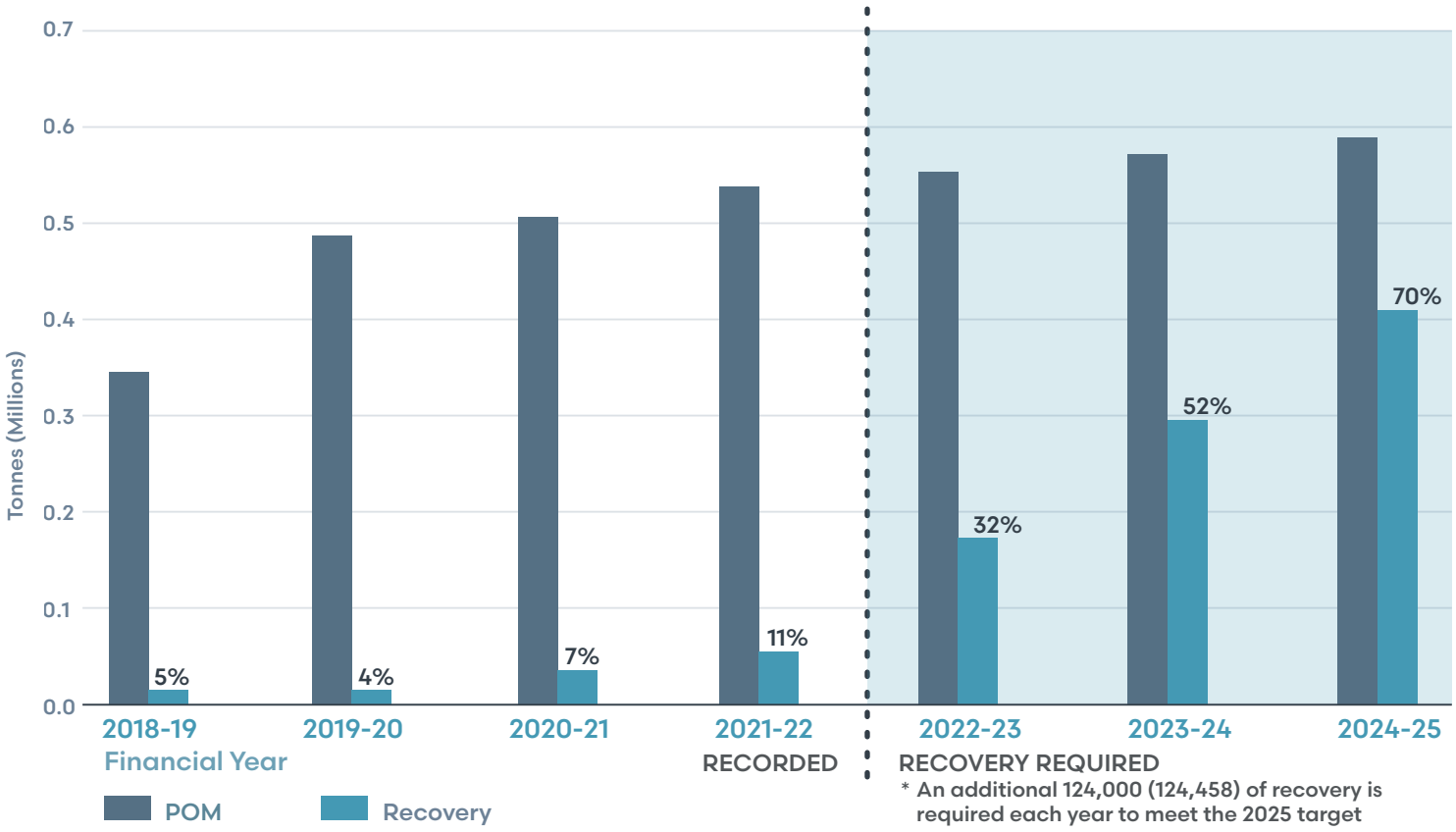
POLYMER BREAKDOWN
FLEXIBLE PLASTIC



POLYMER TRENDS

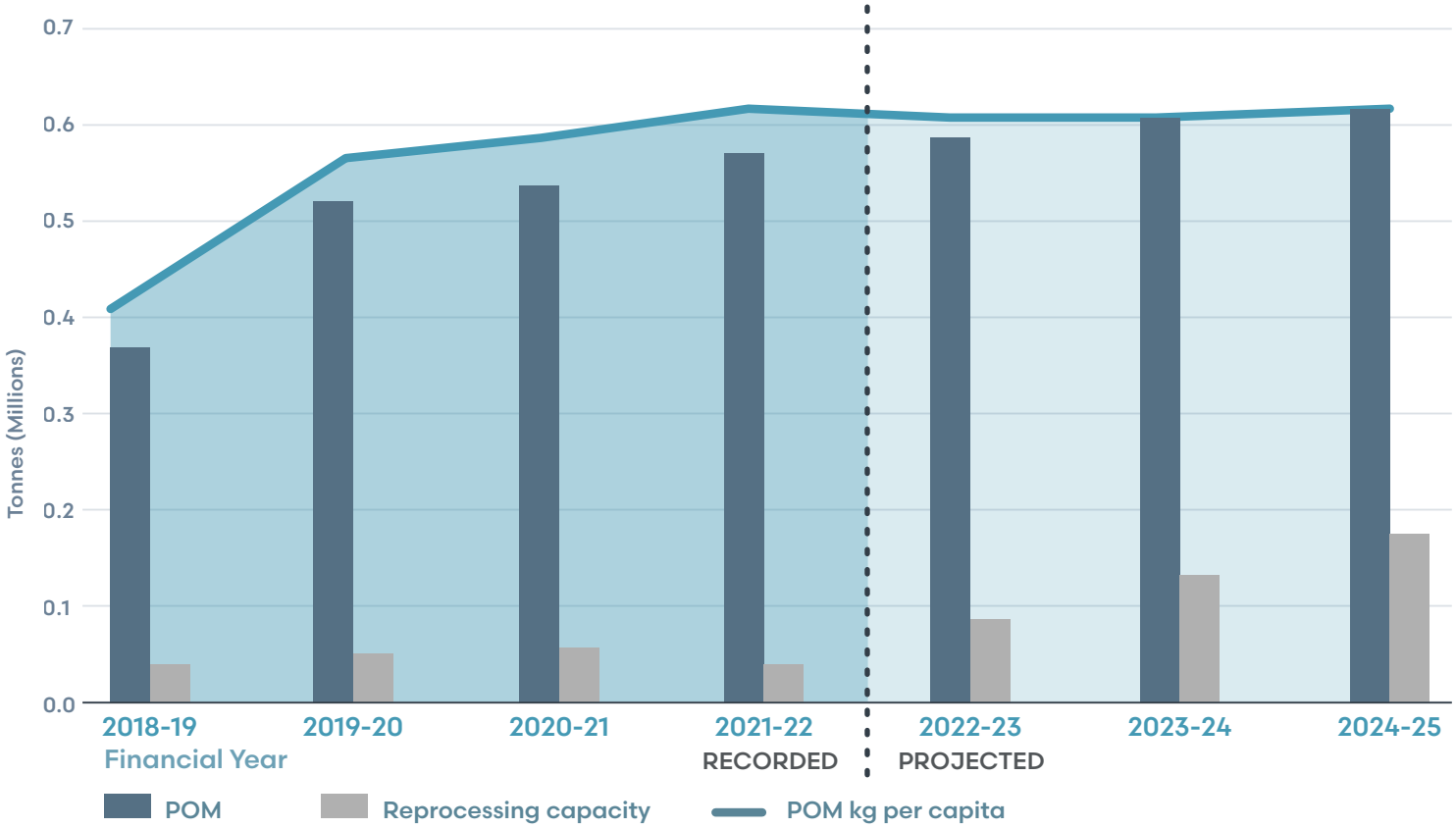


RECOVERY REQUIRED TO MEET TARGETS
FLEXIBLE PLASTIC



* An additional 124,000 (124,458) of recovery is required each year to meet the 2025 target

REPROCESSING CAPACITY



TOP 3 **FLEXIBLE PLASTIC** PRIORITIES

The following three component groups represent 83% of all flexible plastic packaging placed on market (POM) in 2021-22.

	POM (tonnes)	Recovered (tonnes)	Post-consumer recycled content (tonnes)	Pre-consumer recycled content (tonnes)
LDPE	318,067	58,844	5,465	4,640
HDPE	86,116	720	774	79
PP	77,278	2,153	118	77

REDUCTION
OF PROBLEMATIC AND UNNECCESARY SINGLE-USE PACKAGING

PRIORITY ITEM	BASELINE YEAR	2021-22 RESULT	% CHANGE
Single-use HDPE shopping bags*	30,653	100	-99.7%
Rigid PS^	11,399	16,694	46.5%
EPS^	22,023	29,778	35.2%
PVC^	20,355	10,813	-46.9%
Oxo-degradable plastics^	1,500	8	-99.5%
Plastic tableware **	25,225	18,694	-25.9%
Total (excluding plastic tableware)	85,929	57,393	-33.2%

*Baseline year for HDPE shopping bags is 2016-17

^Baseline year for Rigid, PS, EPS, PVC and Oxo-degradable plastics is 2017-18

**Baseline year for Plastic tableware is 2019-20. Not counted in original target

PROGRESS TOWARDS THE 2025 NATIONAL PACKAGING TARGETS

FLEXIBLE PLASTIC

OUTCOME	TARGET	PROGRESS
Packaging designed for circularity and sustainability	**100%** of Australia's packaging will be reusable, recyclable or compostable	**12%** was classified as having good recycling potential
	Problematic and unnecessary single-use plastic packaging will be phased out	**33%** reduction from the 2017-18 baseline
Harmonised and expanded reuse and recovery systems are in place	**70%** of plastic packaging being recycled or composted	**11%** was recovered
Deep and resilient markets exist for recycled materials	**10%** of average recycled content will be included across Flexible Plastic *Target across all materials is 50%*	**1%** of Flexible Plastic was made with post-consumer recycled material

For more information on 2021-22 Australian Packaging and Consumption Recovery data visit: www.apco.org.au or contact APCO.

The reported numbers for Flexible plastics include an allocation of unknown packaging formats based on pro-rated polymer splits between flexible and rigid plastics. For this reason, the reported numbers are higher than the Flexible plastic splits provided in the 2021-22 Consumption and Recovery Report.

All data provided within this document is from or estimated based on the data available within the sources outlined below. These figures do not include packaging lost to litter or with extended shelf life.
Population data sourced from the Australian Bureau of Statistics – National, State and Territory Population data sets. Available here.

This factsheet was developed by the Australian Packaging Covenant Organisation (APCO) using information collated from publicly available sources. Such collated information could not be, and was not, independently verified by APCO and this information may contain typographical and other errors or inaccuracies Although all reasonable attempts were made to ensure the accuracy and Aon an "as is" basis without any representation, warranty or guarantee of any kind. To the maximum extent permitted by law, APCO accepts no liability or responsibility whatsoever for any use of or reliance upon this factsheet by any third party.