



Instituto 17

**Package-less and reuse systems  
through policy intervention:**  
rethinking packaging in international trade

- 1. Consumers are highly aware of sustainability issues, with their concerns accelerating and growing, but they need clarification.**
- 2. In response to public outcry, governments are designing increasingly ambitious regulations for packaging and plastic waste, influencing beyond their national borders.**
- 3. Across regions, there are critical gaps** around waste collection, recycling systems, and technology, limiting significant changes in the packaging value chain over the near term.
- 4. Leading fast-moving consumer goods companies and retailers remain committed to transforming their portfolios, but large-scale market adoption of innovations remains slow and niche oriented.**
- 5. There are technical limits to “circularity”.** The most efficient recycling chain for plastic packaging is still far from an optimal material circularity, and its recycling system is still highly dependent on fossil feedstock.

Current trends that will shape regulations in the years to come

## Focusing on where the measures are happening

European Union & Middle East

European Union

Asia

European Union

European Union



Measures related to sustainable packaging (2019-2021) in 30 selected countries

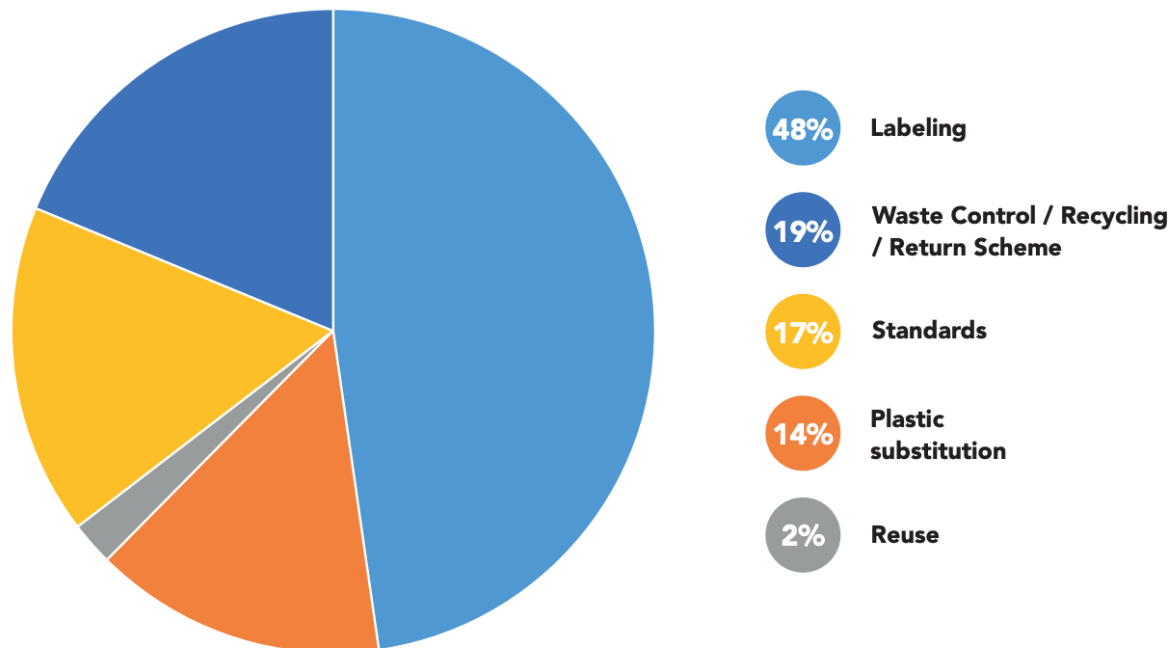
Fonte: ChereI-Bonnemaison, C., et al., *Sustainability in packaging: Global regulatory development across 30 countries*. 2022, McKinsey Company: Chicago, USA. p. 1-9.

## *Focusing on which are the popular measures*



Number of countries per type of adopted measure

**Fonte:** *Cherel-Bonnemaison, C., et al., Sustainability in packaging: Global regulatory development across 30 countries. 2022, McKinsey Company: Chicago, USA. p. 1-9.*



Measures related to packaging and reuse strategies notified to the WTO (2009-2022)

Fonte: WTO, WTO Environmental Database. 2022, World Trade Organization (WTO).



**50%**

of global plastic production is for packaging and non-packaging single-use products



**< 10%**

of all plastic waste has been recycled

COMPANY	PLASTIC PACKAGING WEIGHT (METRIC TONS/YEAR)	PERCENTAGE OF CIRCULAR STRATEGIES (E.G., REUSABLE, RECYCLABLE AND COMPOSTABLE)	PERCENTAGE OF REUSABLES
<b>The Coca-Cola Company</b>	2,961,000	99.0%	1.7%
<b>PepsiCo</b>	2,350,000	77.0%	0.0%
<b>Nestlé</b>	1.267,000	61.0%	1.0%
<b>Danone</b>	717,000	67.0%	4.8%
<b>Unilever</b>	690,000	52.0%	Not reported
<b>Mondelez International</b>	189,500	5.0%	0.0%
<b>Mars, Incorporated</b>	179,382	22.0%	0.0%
<b>L'Oréal</b>	138,000	41.7%	1.0%
<b>FrieslandCampina</b>	68,676	28.0%	0.4%
<b>Kellog</b>	64,806	14.0%	0.0%

Recycling versus reusing based on figures from 2020

**Fonte:** EMF, *The Global Commitment: 2021 Progress Report. 2022*, Ellen MacArthur Foundation: Cowes, England.


***Companies must follow the constant evolution of regulation to keep track of changes and remain compliant. They must develop capabilities to understand regulatory measures, scope, application, and implications for their business and customers.***

***The understanding of the developing regulations on a global scale is overly complex due to the lack of terminology and standard scope.***



*The lack of an established or aligned terminology globally for the **term reuse** can have different meanings, leading to a variable intensity of impact for the industry.*

*For example, **design rules** versus **labelling** creates an overlap of different rules covering a similar scope.*



***Packages have agency.*** *When a package is removed from a product, the tasks it accomplishes must be performed by others, re-distributing the agency to retailers and consumers*

## **A. Recycling, reuse and reduction of plastic production:**

- *Focusing on diversion from landfill meant a focus primarily on recycling. In turn, the **emphasis on recycling enabled a thriving and ever-expanding environment for disposable products.***
- ***Developing countries are no strangers to reusing models**, and uptake of such systems can be accelerated with policies incentivising their adoption while mandating a reduction of plastic production and use.*
- *The **reuse strategy promotes and encourages the sale of reusable containers, especially non-plastic containers**, avoiding the problems associated with disposable plastics substitutes.*
- ***Reuse strategies should have the potential to create jobs at local level.** Therefore, the informal waste sector should be involved in the process of developing an efficient and well-managed packaging reuse systems, ensuring a fair and inclusive transition.*

## **A. Recycling, reuse and reduction of plastic production:**

- *Reuse strategies should **decrease public administration spending on waste management.***
- ***Standardisation of reusing packaging in B2B** (i.e., pallets, crates, dunnage, drums, intermediate bulk containers, and big bags) allows for automatisisation and cost reduction.*
- ***Products that are trading internationally should be designed to be reused and to use fewer raw materials in their life cycle.** In this sense, eco-design and LCA are tools that can assess raw materials use and evaluate product environmental impacts.*

## ***B. Circular economy versus recycling economy:***

- *The absence of definitional precision, in combination with specific weaknesses in the formulation of targets, leads to a problem in which **companies talk about a circular economy while implementing a recycling.***
- ***Companies prioritise recyclable packaging over package-less or reusable products, especially in the food sector.***
- ***Companies must develop capabilities to understand regulatory measures, scope, application, and implications for their business and customers regarding plastic pollution. They must keep track of changes and remain compliant to thrive.***

## ***B. Circular economy versus recycling economy:***

- *Package-less and reuse systems must be designed with the local context in mind. They **must guarantee affordability and accessibility for low-income communities.***
- *Package-less and reuse strategies need to be scalable. Thus, **reuse models must consider consumer behaviour and address their needs.***



*Thank you!*

- *The study was prepared by the Instituto 17 (i17) under the guidance of the Quakers United Nations Office (QUNO) and direct supervision of Nozizwe Madlala Routledge and Andrés Naranjo Jijon.*
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## PACKAGE-LESS AND REUSE SYSTEMS THROUGH POLICY INTERVENTION: RETHINKING PACKAGING IN INTERNATIONAL TRADE



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Quaker United Nations Office