



EUROPEAN
CARTON MAKERS
ASSOCIATION

European legislation and the fibre packaging sector



Agenda

1. Welcome and Introduction

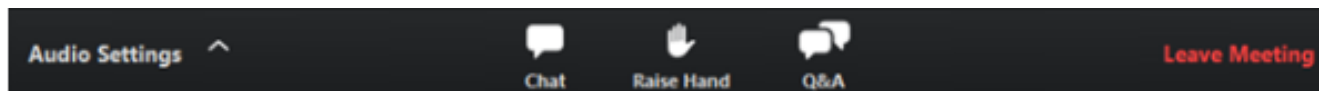
2. ECMA Antitrust Guidelines

Some useful tips before we start:

- You have a control panel at the bottom of your Zoom screen.
- Questions can be asked by clicking on the 'Q&A' or 'Raise Hand' button during the webinar. Your question will be answered at the end of the presentation.
- Make sure to mute your audio line in case this has not been done automatically by the host.



Your Presenter:
Mike Turner
ECMA Managing Director



ECMA Antitrust Reminder



- ECMA is committed to compliance with the antitrust rules that aim to achieve free competition and fair terms for all business transactions.
- The participants in this meeting hereby acknowledge that no issue will be discussed that will violate antitrust rules and that during this online meeting these rules shall be respected under all circumstances.

ANTITRUST
GUIDELINES



THE VOICE OF THE EUROPEAN
FOLDING CARTON INDUSTRY



Date for your diary



- 7 October @ 15.00 CET: **2020 Virtual Review and Awards Ceremony**



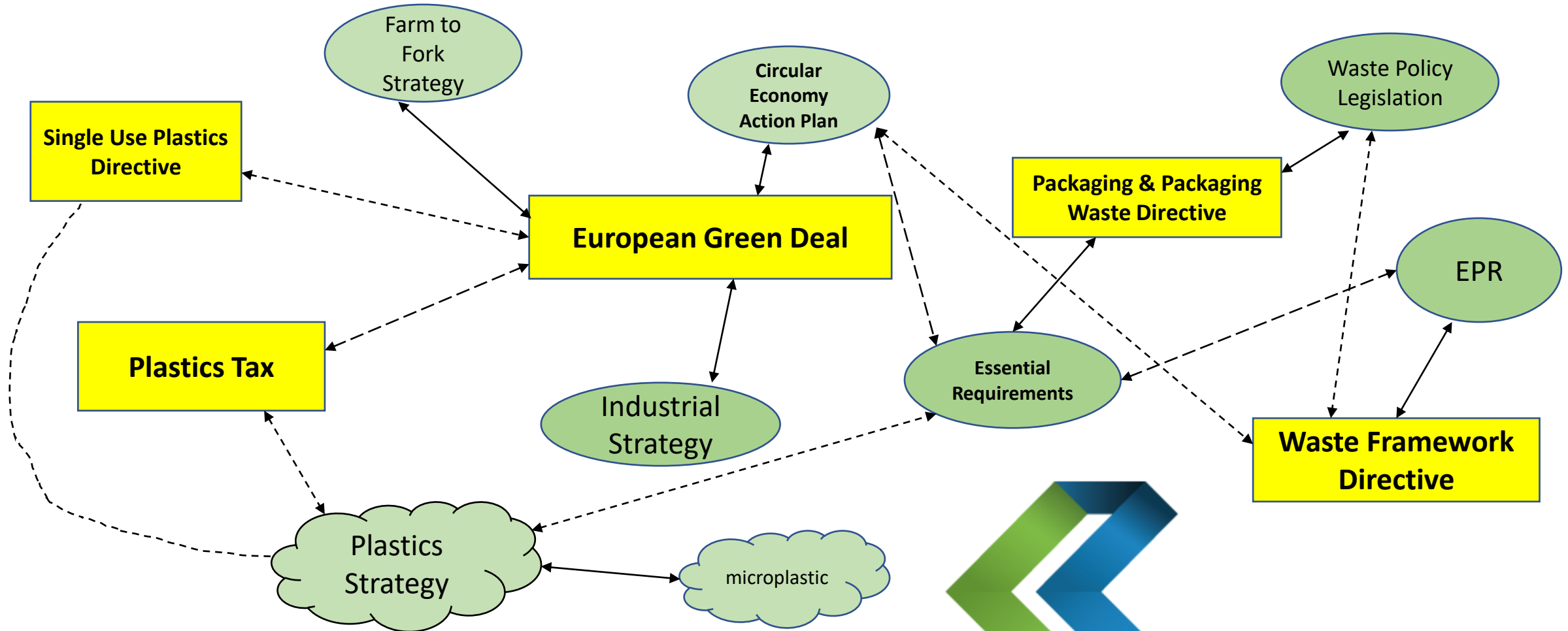


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Strategy & Legislation mapping

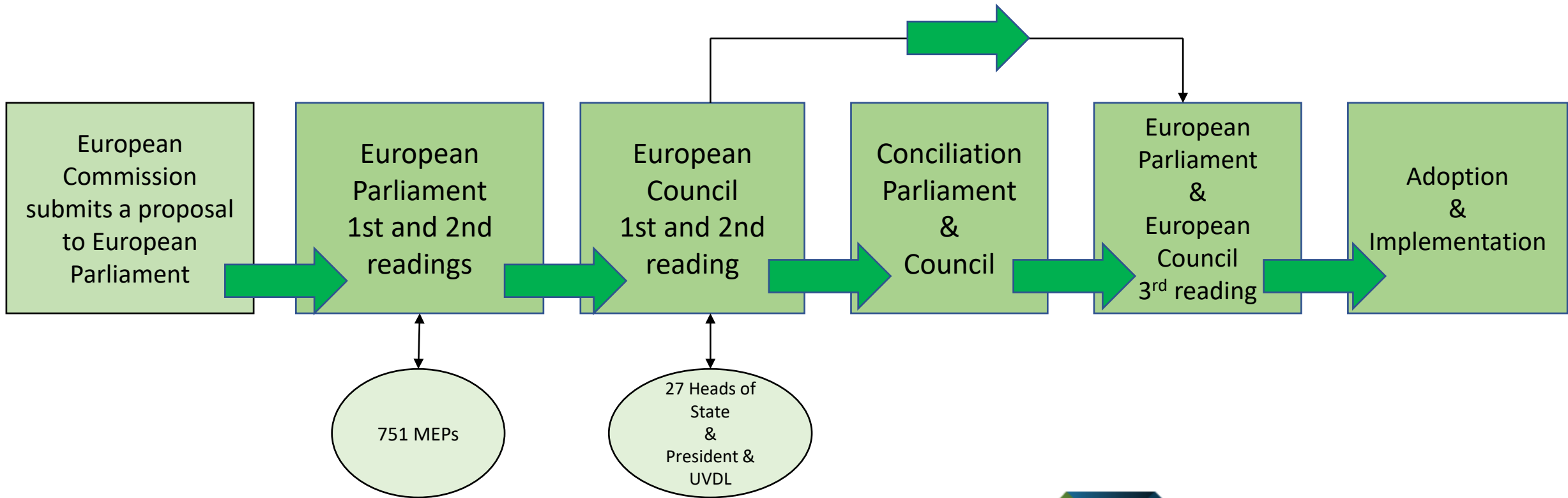


Content

- **European Commission process for advancing policy**
 - Strategy, Directives and Legislation
 - Ordinary Legislative Procedure
- **European Green Deal – the #1 European Commission priority**
 - Farm to Fork Strategy
 - Circular Economy Action Plan
 - Industrial Strategy
- **Legislation & Directives**
 - Packaging & Packaging Waste Directive / Essential Requirements
 - Single Use Plastics Directive
 - Plastics Tax
 - Waste Framework Directive
- **ECMA advocacy**
- **Timelines**



Ordinary Legislative Procedure



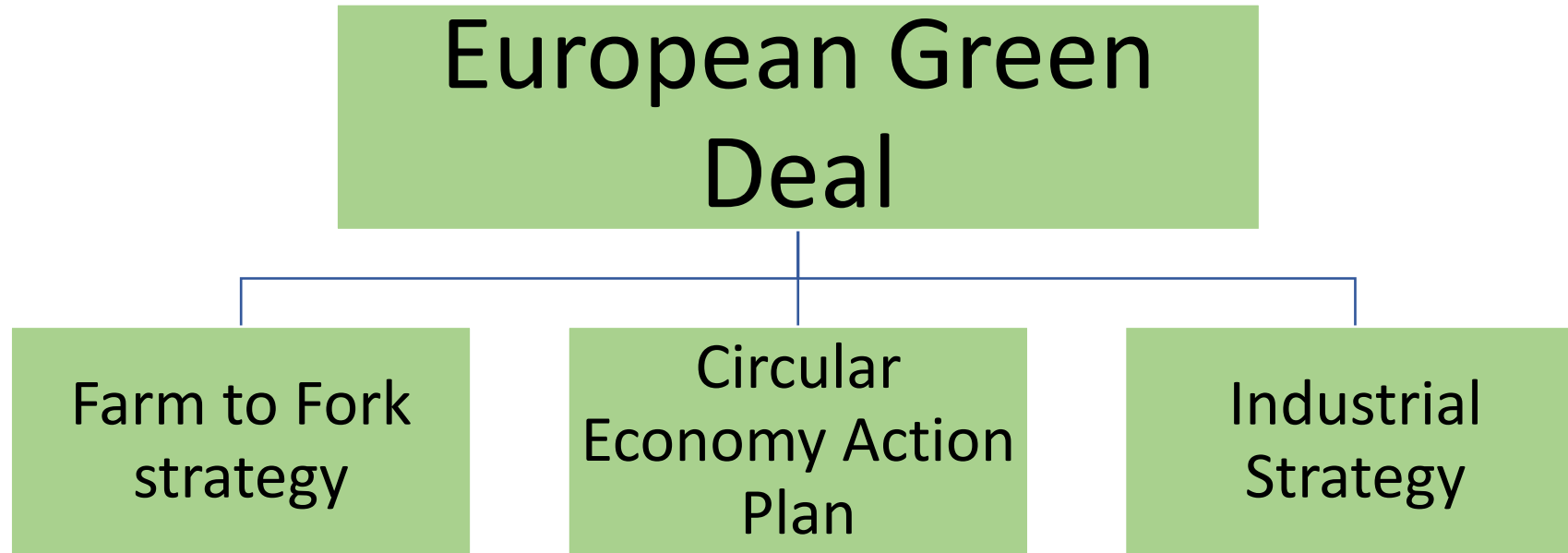
European Green Deal



- EGD – the #1 Commission priority & goal for 2019-24
- Overarching aim = climate neutrality by 2050
 - 50% reduction in 1990 GHG emissions by 2030
 - Similar to USA ‘Green New Deal’
- EGD – provides a roadmap with actions to
 - Boost efficient use of resources by moving to a clean circular economy
 - Restore biodiversity and cut pollution
 - Strive to be the first climate-neutral continent
- Frans Timmermans – Exec VP of the EC for the EGD



European Green Deal



EGD - Farm to Fork strategy



Support of innovative & sustainable packaging solutions

Food waste reduction

Farm to Fork strategy

Use of environmentally friendly, ideally reusable & recyclable materials

Reduce single use packaging



EGD - Circular Economy Action Plan



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Recycle 75% of packaging waste by 2030

Sustainable products are the norm

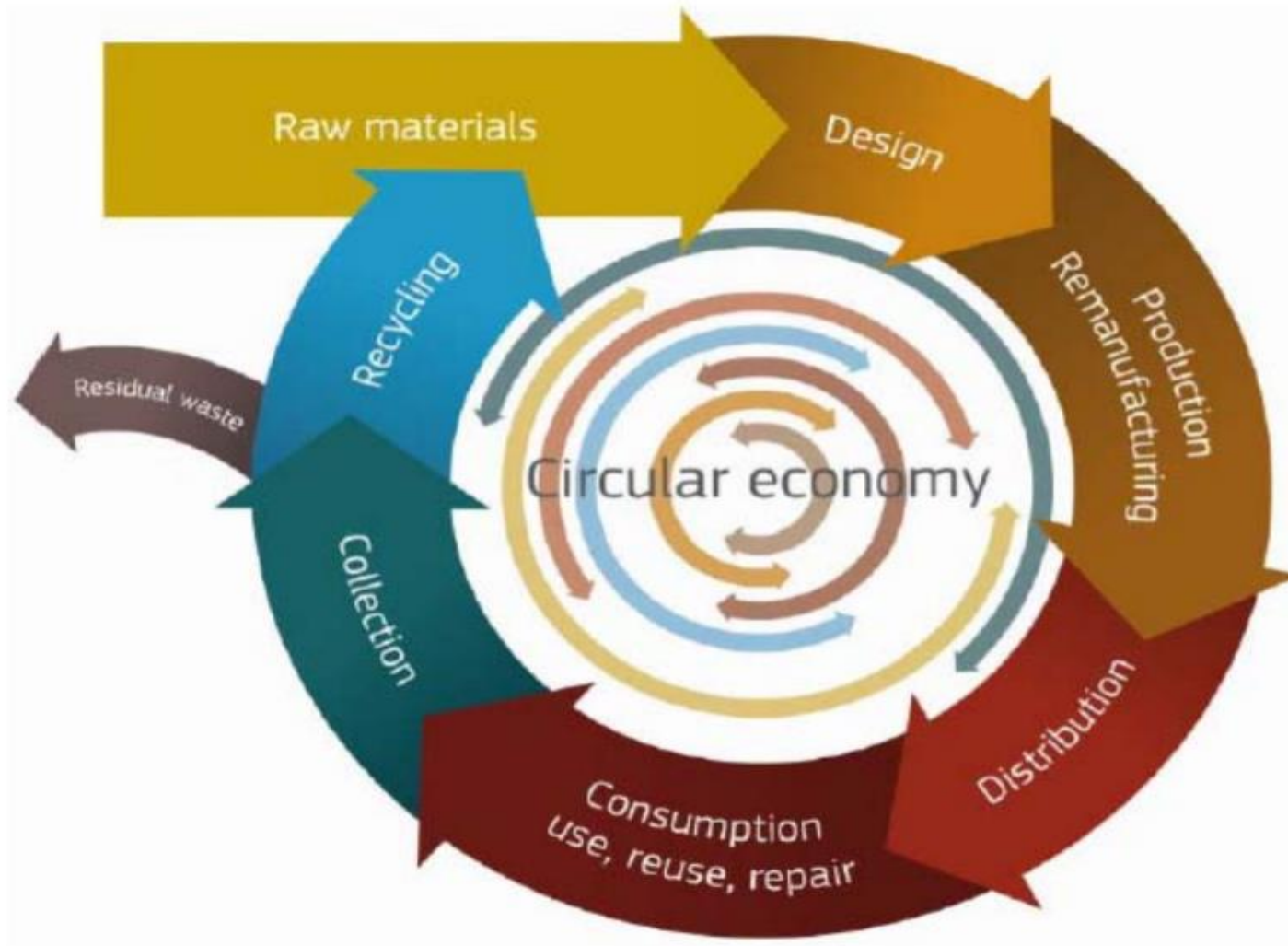
Circular Economy Action Plan

Bans on recyclable & reusable packaging
in landfill

Focus on sectors that use the most
resources (inc packaging)



Circular Economy – aspirations



EGD - Industrial Strategy

Embedding circularity
across supply chains

Digital transition

Industrial
Strategy

Compete on the Global
stage

Single Market
enforcement



Packaging & Packaging Waste Directive



- The main piece of European legislation which governs packaging and packaging waste in Europe and affects every member of ECMA
- The PPWD is an EU harmonisation measure, meaning that it establishes common (i.e. harmonised) rules that enable packaging and packaged goods to trade freely throughout the EU
- This Directive contains **Essential Requirements** for packaging and all packaging that meets these requirements, is guaranteed free circulation in the European Economic Area
- European Commission is now engaged in a programme to update and review the effectiveness of the **Essential Requirements** by 2022



Essential Requirements



- All packaging must meet the ‘Essential Requirements’
- Process underway to amend Essential Requirements driven by:
 - Per capita European consumption of packaging is increasing despite increased light-weighting (light-weighting of some packaging was noted in the call as increasing the difficulty in recycling)
 - Decline in re-useable packaging
 - Plastic packaging has seen the most growth since 1997, at the expense in particular of glass packaging (Flexible packaging placed on the market has increased 16% in the 2003-2018 period)
 - Overpackaging continues to be an issue, particularly linked to an increase in e-commerce
- Consultation documents include following issues as being “problematic”
 - “Plastic -coated or metallized cardboard” mentioned under multi-material packaging – considered a problem because of the challenge to separate the plastic/metal from paper and can be recycled in a specialised plant
 - “Paper cured with UV varnish/ varnish that breaks down into small particles” – also considered to be a challenge for the recycling process because it cannot be readily removed by de-inking process and can break into microplastic polluting waste-water
 - “Paper with adhesives which plasticise” – also considered a challenge for the recycling operations because of the potential to form “stickies”
- Mandated ratios of packaging to product



Waste Framework Directive



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- Introduced the ‘polluter pays principle’ and ‘Extended Producer Responsibility’
- Waste legislation and policy of the EU Member States shall apply in priority order, the waste management hierarchy
- This Directive is being amended to improve management of sustainable materials in line with the Circular Economy Action Plan



Waste Framework Directive



- European Commission aims to improve the transparency and cost effectiveness of Extended Producer Responsibility (EPR) schemes by defining minimum requirements for recycling...and to include litter collection and litter awareness raising in the EPR cost
- Financial responsibility for packaging waste will be shifted upstream to the producer
- Eco design / eco modulation – to incentivize / penalize packaging depending on its circular economy attributes



Single Use Plastics Directive



- Focus to prevent and tackle marine litter by phasing out unnecessary single-use plastics (**BANS**), introducing economic incentives to reduce consumption and transition to reusable systems, and establishing high collection rates and extended producer responsibility schemes (EPR)
- The SUPD was proposed in May 2018, within 8 months agreement was reached to tackle single use plastics in the EU and the legislation was approved in June 2019
- The Directive calls for the EC to adopt a set of guidelines defining which single-use products are within scope of the directive by July 2020 and a range of implementing acts detailing bans and consumption reduction targets, that are to be completed between July 2020 and January 2022
- In public consultations, 95% of the respondents said action against SUP's are necessary and urgent (**GENERATED HIGH POLITICAL SUPPORT**)



Single Use Plastics Directive



- SUP Directive is limited to products falling within 86% of the total disposable plastic articles found on beaches in the European Union... Paper/Cardboard - Cups, food trays, food wrappers, drink containers" are in the 55th place and represent 0.27% of the marine litter, but are still within the Directive's scope
- REALITY**
TRUE
CHECK
- The SUPD is Lex Specialis...taking precedent over other law
 - Structural & functional packaging components mixed and given equal weighting...products with 90%+ fibre in scope
 - Main & minor packaging components given equal weighting
 - Lack of alignment with Circular Economy aspirations
 - Risk of morphing into Single Use Products....France leading the way



SUPD - Labelling requirements

- SUP's to show a harmonized pan-European conspicuous, clearly legible and indelible marking to inform consumers of the presence of plastics and waste management options...

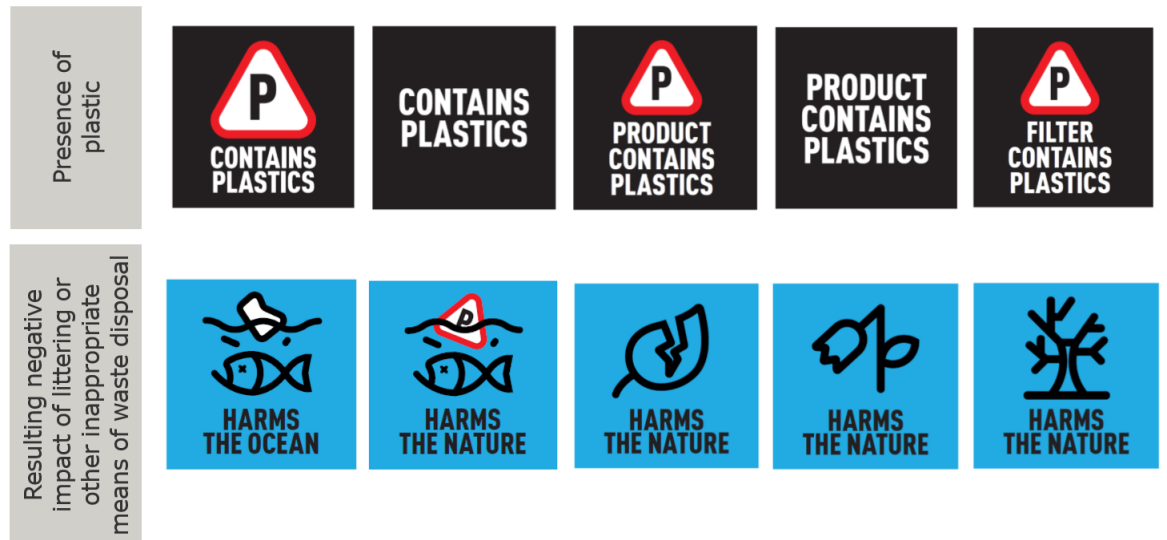
FIRST IDEAS FOR MARKING OPTIONS

Taking into consideration all requirements to be fulfilled in relation to Article 7 of the Directive



FIRST IDEAS FOR MARKING OPTIONS

Taking into consideration all requirements to be fulfilled in relation to Article 7 of the Directive



Plastics Tax



- Revenue raising / fill budget gap from UK departure – estimated to raise €6.6 billion per annum
- Not clear if items made of plastic and/or containing plastics are in scope
- National Governments charged €0.8/kg for non-recycled plastic packaging and this tax has received general support
- Confirmation when 2021-27 budget is approved



Plastics Strategy - microplastics



- European Chemicals Agency (ECHA) proposal to restrict intentionally added microplastics to any consumer products (inc those unintentionally formed through the wear & tear of larger pieces of plastics)
- Public consultation closed in September 2019 & the ECHA proposal was adopted June 2020
- Final opinion by end of 2020 after which European Commission will consider amendments to REACH legislation
- Microplastics defined as solid polymer containing particles of less than 5mm



ECMA – advocacy



- Public consultations <https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives>
- Stakeholder working groups, workshops, consultations and written submissions
- Position papers
- Direct contact with President or VP's, MEP's, European Commission Departments or Commissioners
- Alignment of communication with the fibre value chain – CEPI, CITPA, FEFCO, EPPA, ACE



- Single Use Plastics Directive (with fibre value chain)
 - Definitions
 - Labelling
 - Removal of cellulose being defined as a polymer
 - Removal of paper & board sizing agents being included
 - Focus for barrier coating thresholds to be introduced
 - Focus on economic cost

- Tobacco Products Directive
 - SUPD Labelling
 - TPD Implementation
 - Plain packaging



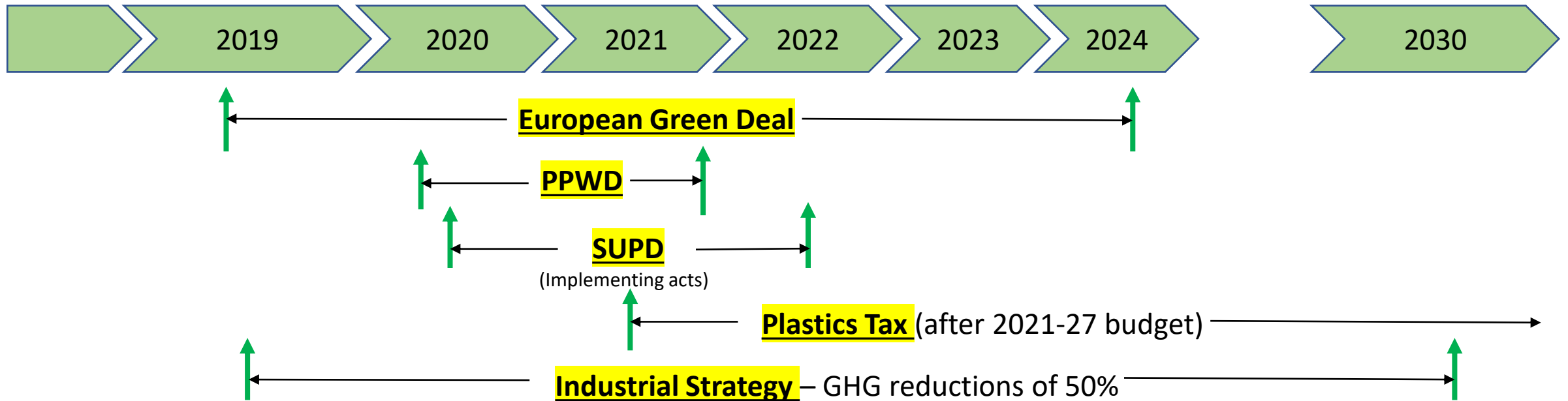
- Packaging & Packaging Waste Directive
 - Effectiveness of the Essential Requirements
 - Measures to reduce packaging waste
- WRAP – English Carbon Metric – along with BPIF Cartons, Pro Carton, CPI in UK
- Other past projects
 - Enforcement of Late Payments Directive
 - Covid-19 ...introduction of green highways
 - OPRL recognizing that a 15% barrier coating on cartonboard is recyclable



Timeline



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Klik om stijl te bewerken



Thank you for your attention!

- For any questions please contact mail@ecma.org
- You will receive a short survey to help us improve our future webinars

