VERSION 1: DECEMBER 2024

FLEXIBLE PLASTIC

CONSUMPTION AND RECOVERY

2022–2023 FACTSHEET

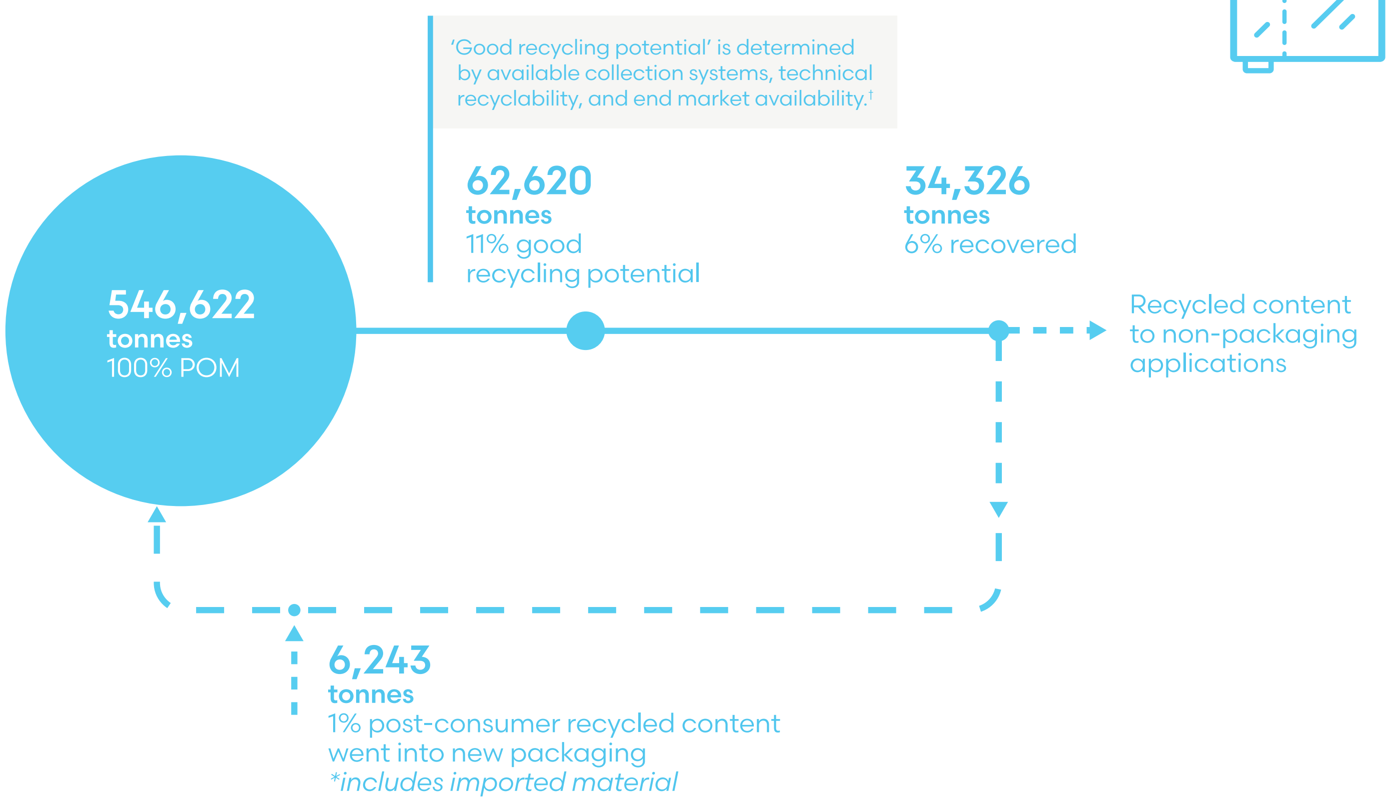
Australian
Packaging Covenant
Organisation

APCO

Summary
FLEXIBLE PLASTIC

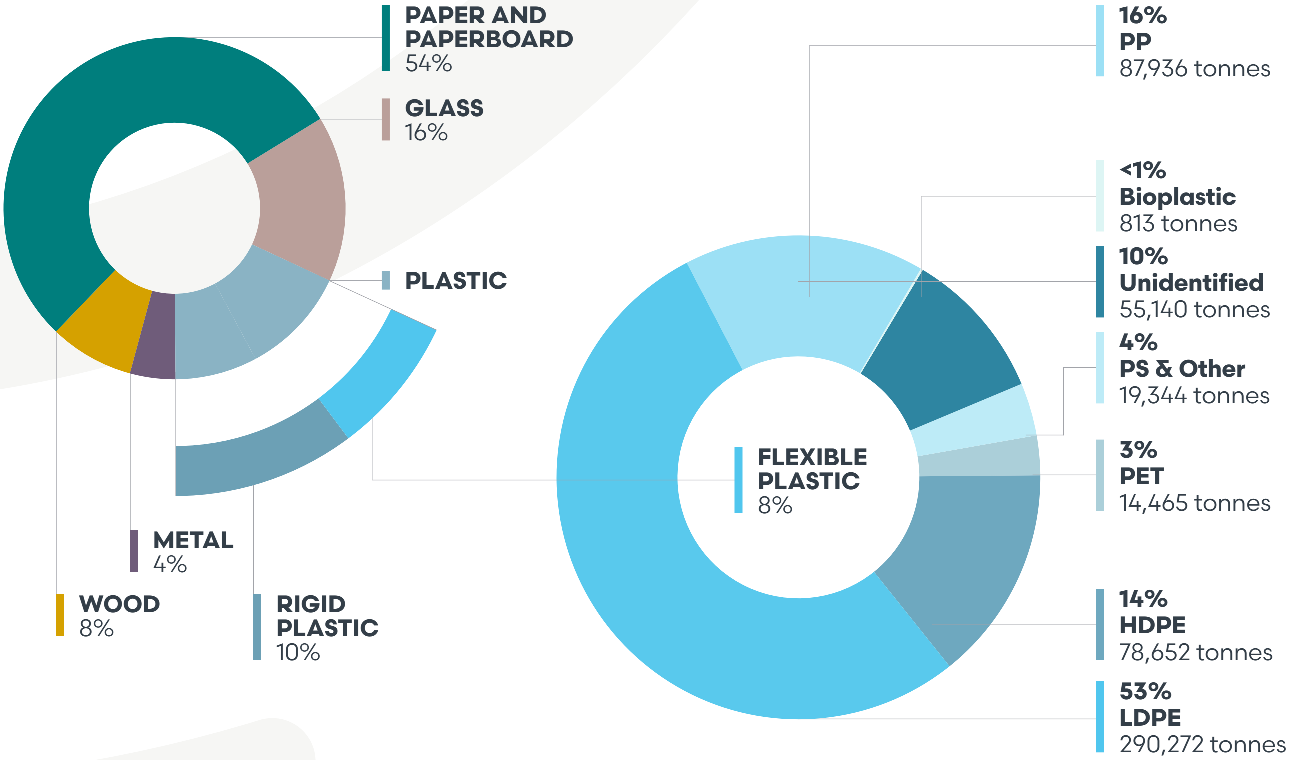
- Approximately 8% of packaging placed on market (POM) was flexible plastic, representing 546,622 tonnes.
- Soft plastic packaging plays a crucial role in **safeguarding products** by providing durable protection, extending shelf life, and reducing food waste, all while being lightweight.
- Flexible plastic packaging POM was made from 98% virgin materials, 1% pre-consumer recycled materials and 1% post-consumer recycled materials.
- **Less flexible plastic packaging is recovered when compared to rigid plastics.** While flexible plastics make up 43% of all plastic packaging POM, it represents only 15% of all plastic packaging recovered. **This gives flexible plastic packaging the lowest recovery rate for any material category, at just 6% or 34,326 tonnes.**
- The volume of flexible plastic packaging POM declined approximately 5% between 2021-22 and 2022-23. Flexible plastic POM is estimated to grow at a rate that continues to be well above population growth, with a 5-year projected compound annual growth rate (CAGR) POM of 3.0%/yr across the 2022–23 to 2027–28 period compared to a population CAGR of 1.4%.
- **Low domestic reprocessing capacity for flexible plastic content limit the uptake of domestic recycled content in new flexible plastic packaging placed on market.** Over the next 5 years, flexible plastic reprocessing capacity is projected to increase by 286,881 tonnes, bringing reprocessing capacity to 54% of POM in 2027-28, compared to just 10% in 2022-23.
- There is a need to support both packaging-to-packaging and other end markets to close economic gaps and boost the demand for this recycled content through the system. This will require consumer education, collection and a range of reprocessing technologies.
- **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.

Material recovery

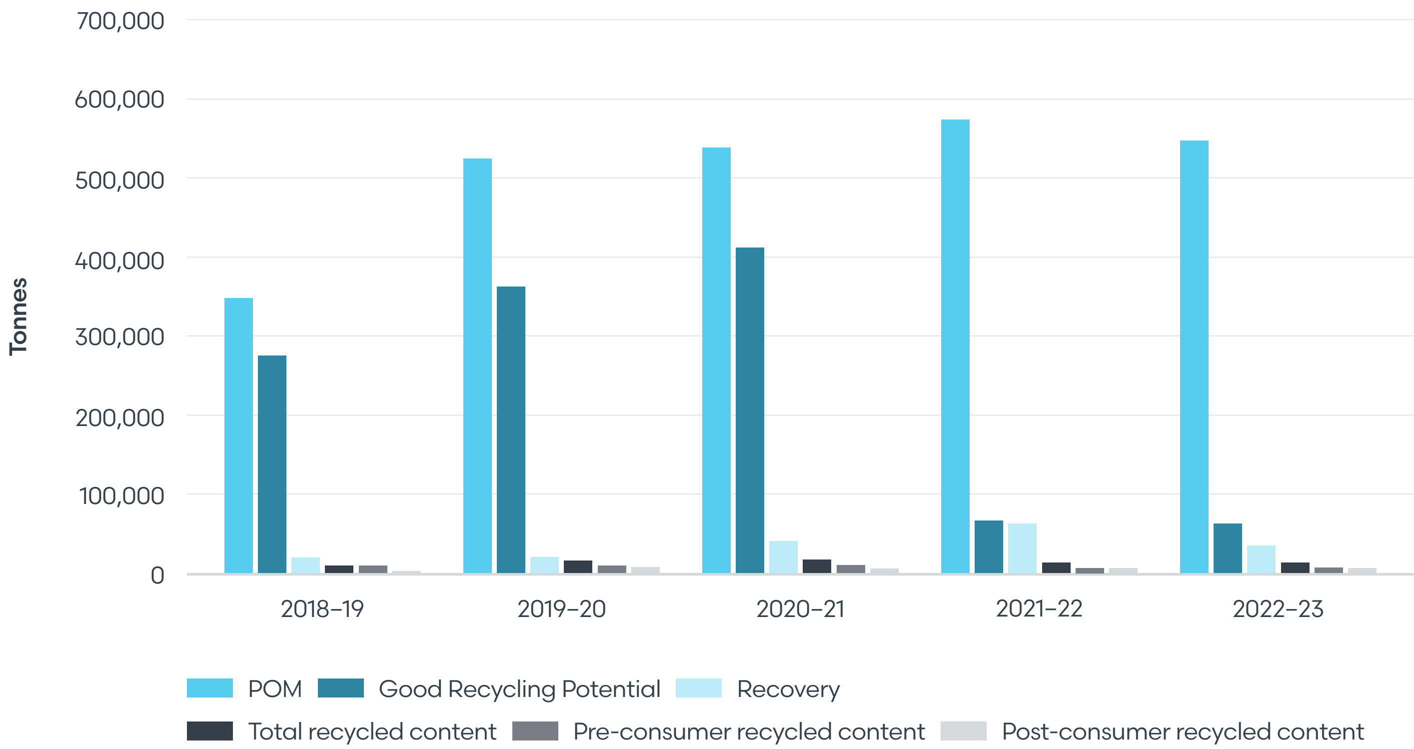


† Further explanation available on 'good recycling potential' here.

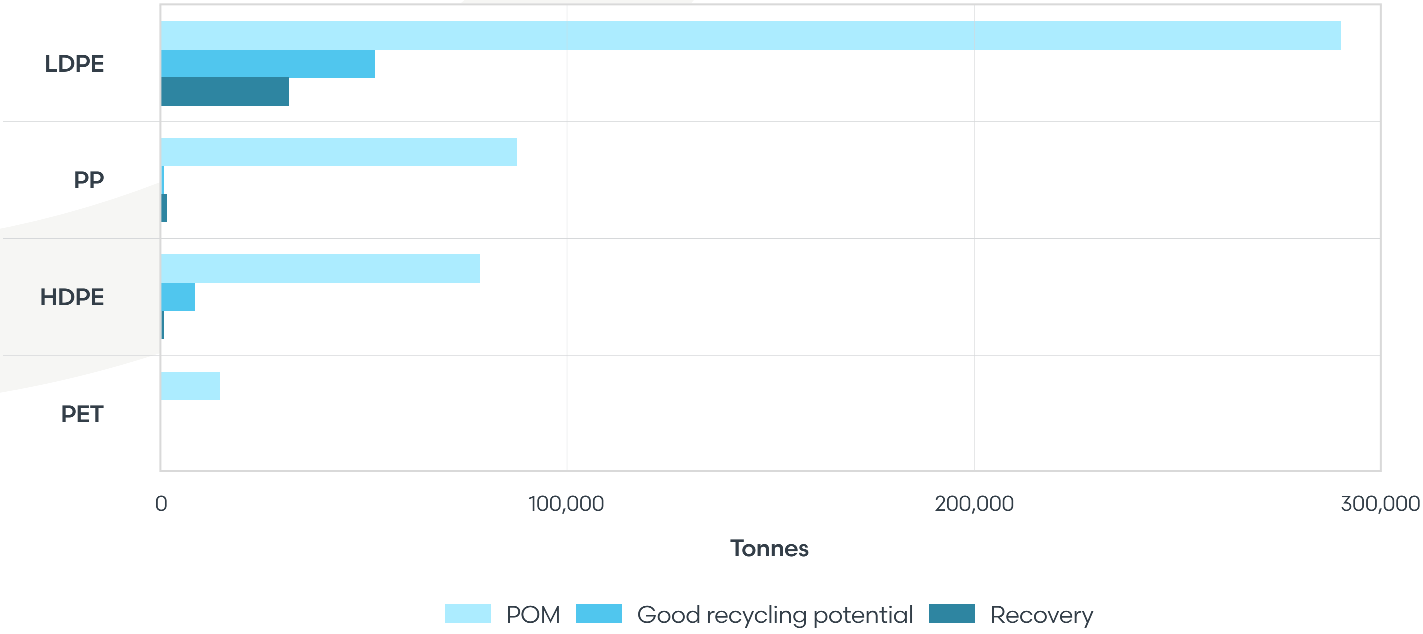
Placed on market
FLEXIBLE PLASTIC



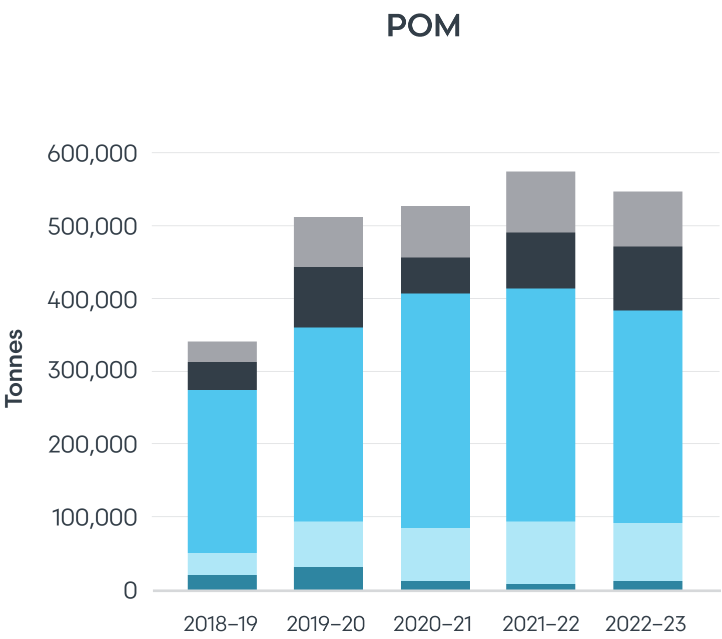
TRENDS

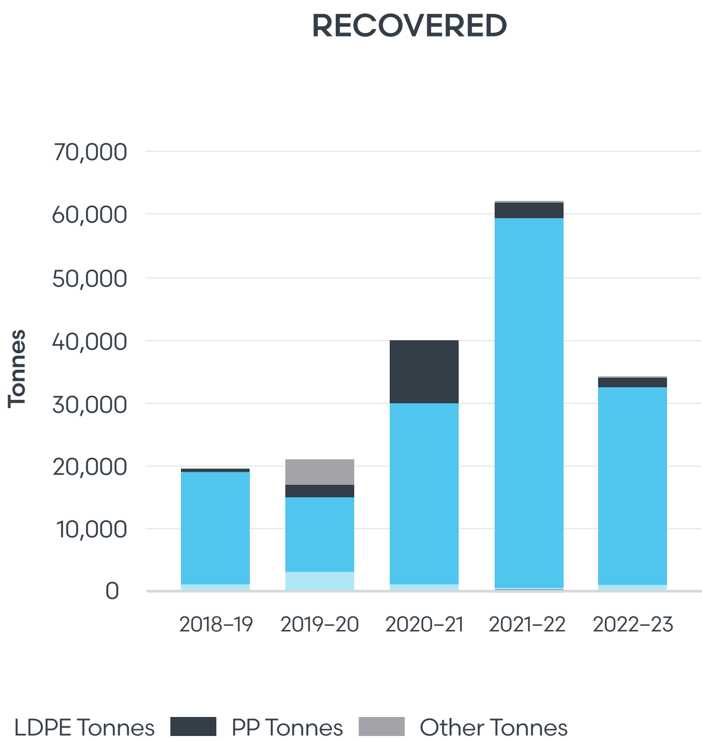


Polymer breakdown

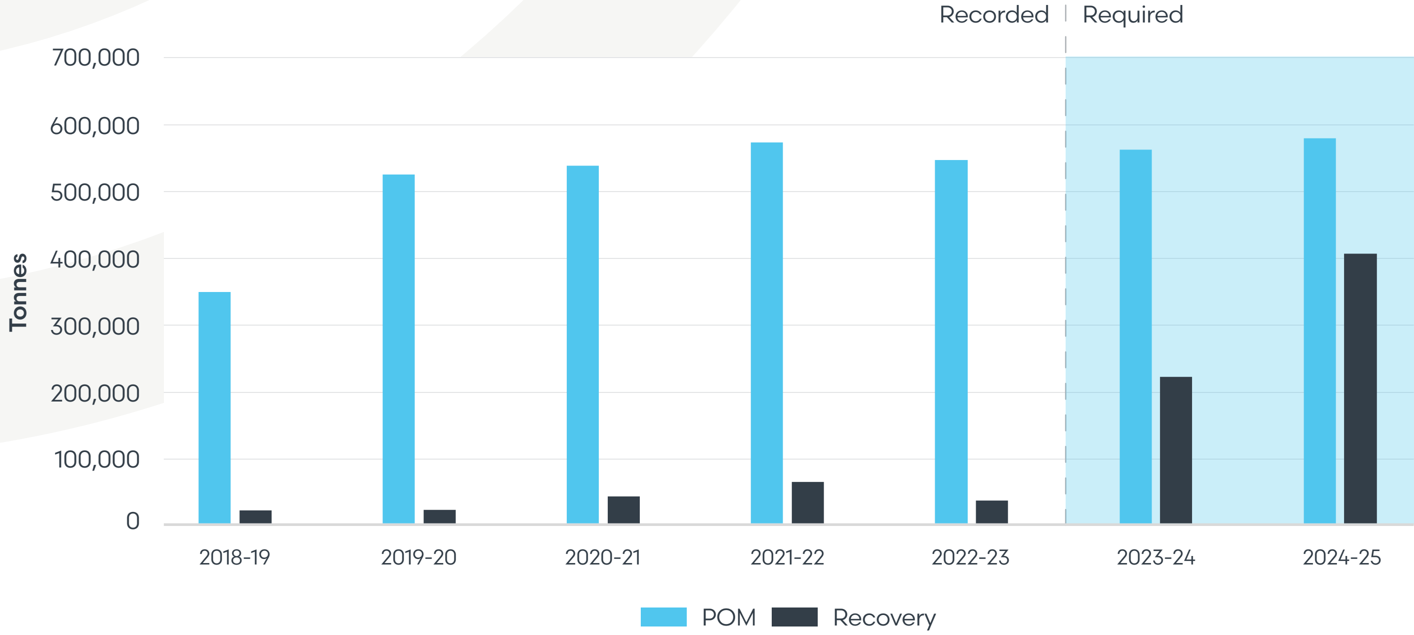


Polymer trends

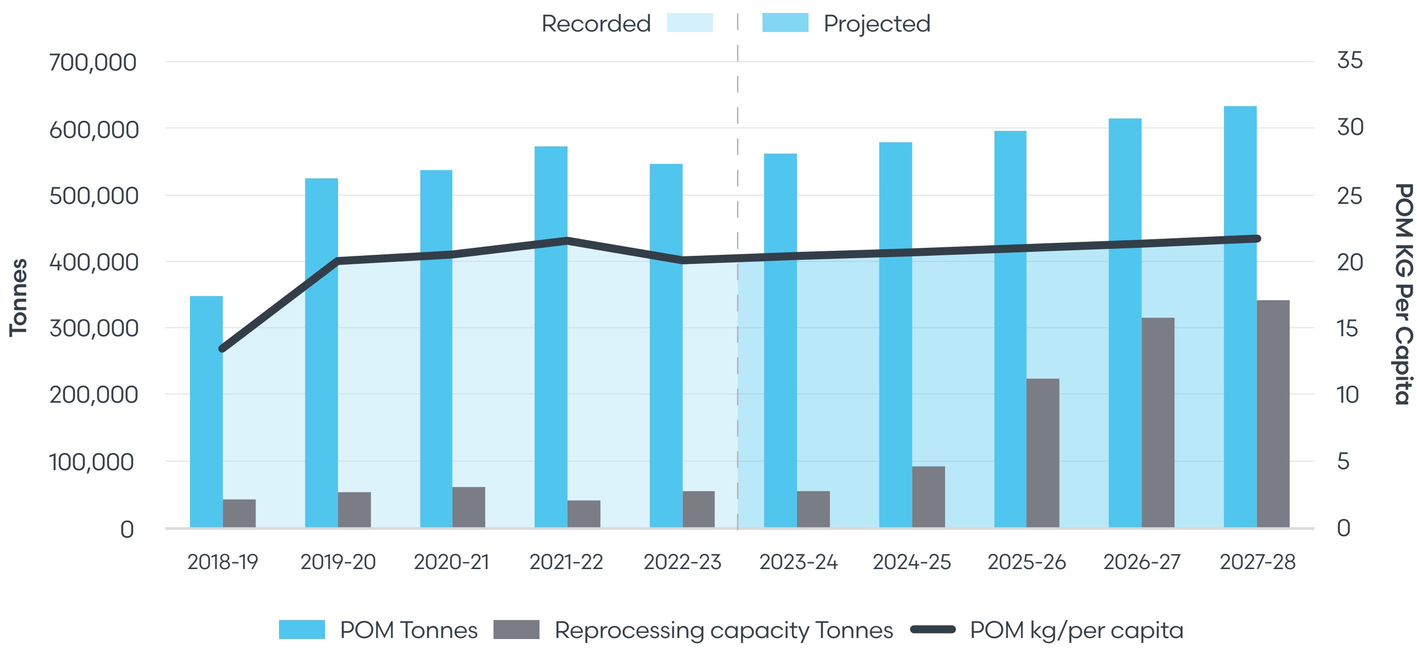




Recovery required to meet targets



Reprocessing capacity



Top 3 priorities
FLEXIBLE PLASTIC

The following three groups represent 84% of all flexible plastic packaging placed on market (POM) in 2022-23.

	POM (tonnes)	Recovery (tonnes)	Pre-consumer recycled content (tonnes)	Post-consumer recycled content (tonnes)
LDPE	290,272	31,506	6,400	4,699
HDPE	78,652	1,084	0	57
PP	87,936	1,433	0	414

Reduction of problematic and unnecessary single-use packaging

Reduction in problematic and unnecessary SUPs by year (mix of rigid and flexible plastics).

Priority item	2019-20 (tonnes)	2020-21 (tonnes)	2021-22 (tonnes)	2022-23 (tonnes)	2021-22 to 2022-23 change
Single-use HDPE shopping bags	159	81	100	–	-100%
Rigid PS	17,074	17,169	16,694	13,904	-17%
EPS	22,709	29,048	29,778	27,686	-7%
PVC	16,873	14,768	10,813	9,706	-10%
Oxo-degradable plastics	2,133	758	8	8	0%
Plastic tableware	25,225	13,224	18,694	19,323	3%

Progress towards the National Packaging Targets

OUTCOME	TARGET	PROGRESS
Packaging designed for circularity and sustainability	**100%** of packaging is reusable, recyclable or compostable	**11%** was classified as having good recycling potential
	Problematic and unnecessary single-use plastic packaging will be phased out	**~40%** reduction from the 2017-18 baseline **All plastics*
Harmonised and expanded reuse and recovery systems are in place	**70%** of plastic packaging is recycled or composted	**6%** was recovered
Deep and resilient markets exist for recycled materials	**10%** recycled content 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 2022-23 Australian Packaging and Consumption Recovery data visit:

www.apco.org.au or contact APCO.

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.