

VERSION 1: OCTOBER 2025

FLEXIBLE PLASTIC

CONSUMPTION AND RECOVERY

2023–2024 FACTSHEET



Australian
Packaging Covenant
Organisation

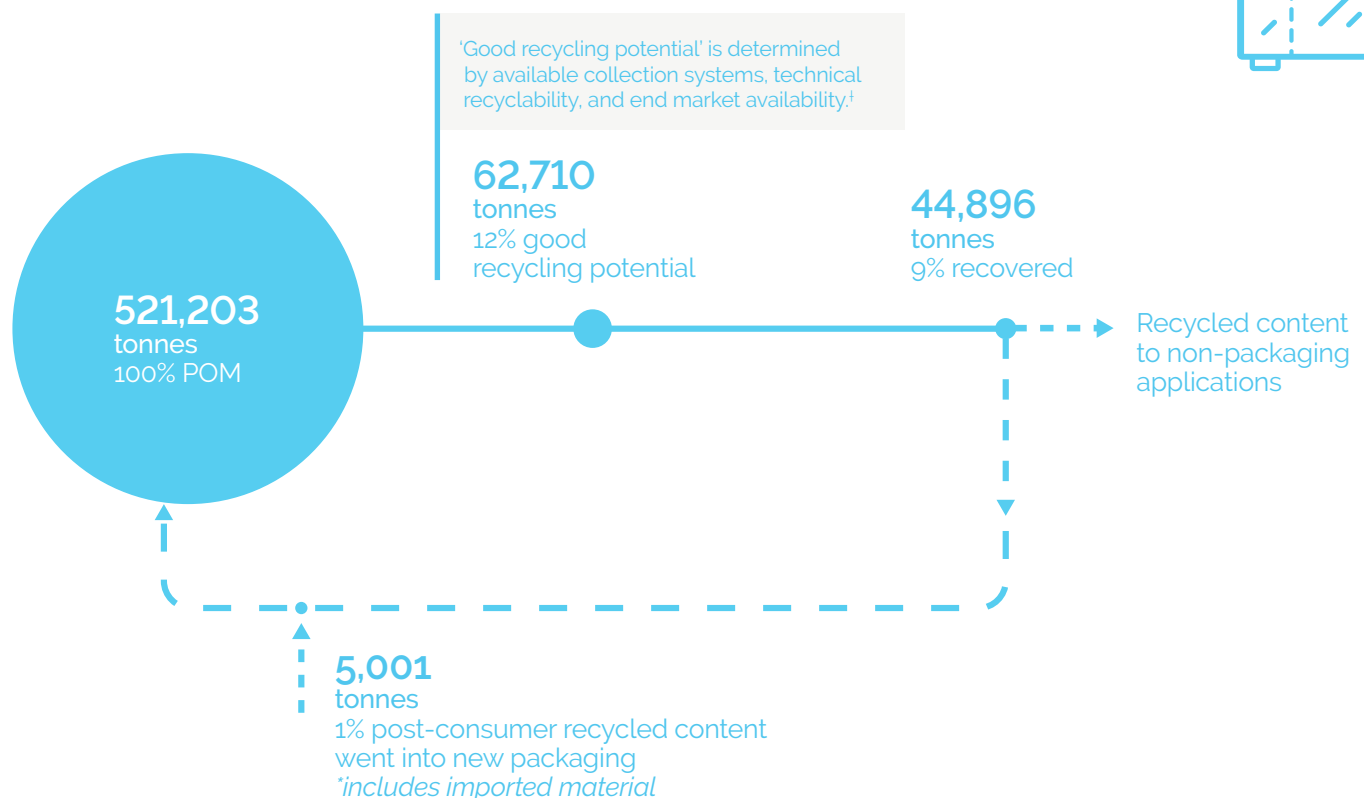


Summary

FLEXIBLE PLASTIC

- Approximately 8% of packaging placed on market (POM) was flexible plastic, representing 521,203 tonnes.
- Flexible plastic packaging plays a crucial role in safeguarding products by providing durable protection, extending shelf life, and reducing food waste, all while being lightweight and cost-effective.
- Flexible plastic packaging POM was made from 99% virgin materials, <1% pre-consumer recycled materials and <1% post-consumer recycled materials. **Designing for recovery, increasing collection pathways, increasing reprocessing capacity and developing deep and resilient end markets will be key to driving improvement.**
- **Less flexible plastic packaging is recovered when compared to rigid plastics.** While flexible plastics make up 41% of all plastic packaging POM, it represents only 18% of all plastic packaging recovered. This gives **flexible plastic packaging the lowest recovery rate for any material category, at just 9% or 44,896 tonnes.**
- The volume of flexible plastic packaging POM declined approximately 4% between 2022-23 and 2023-24. 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 2.8%/yr across the 2023-24 to 2028-29 period compared to a population CAGR of 1.3%.
- **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 382,093 tonnes, bringing reprocessing capacity to 70% of POM in 2028-29, compared to just 7% in 2023-24.
- 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.

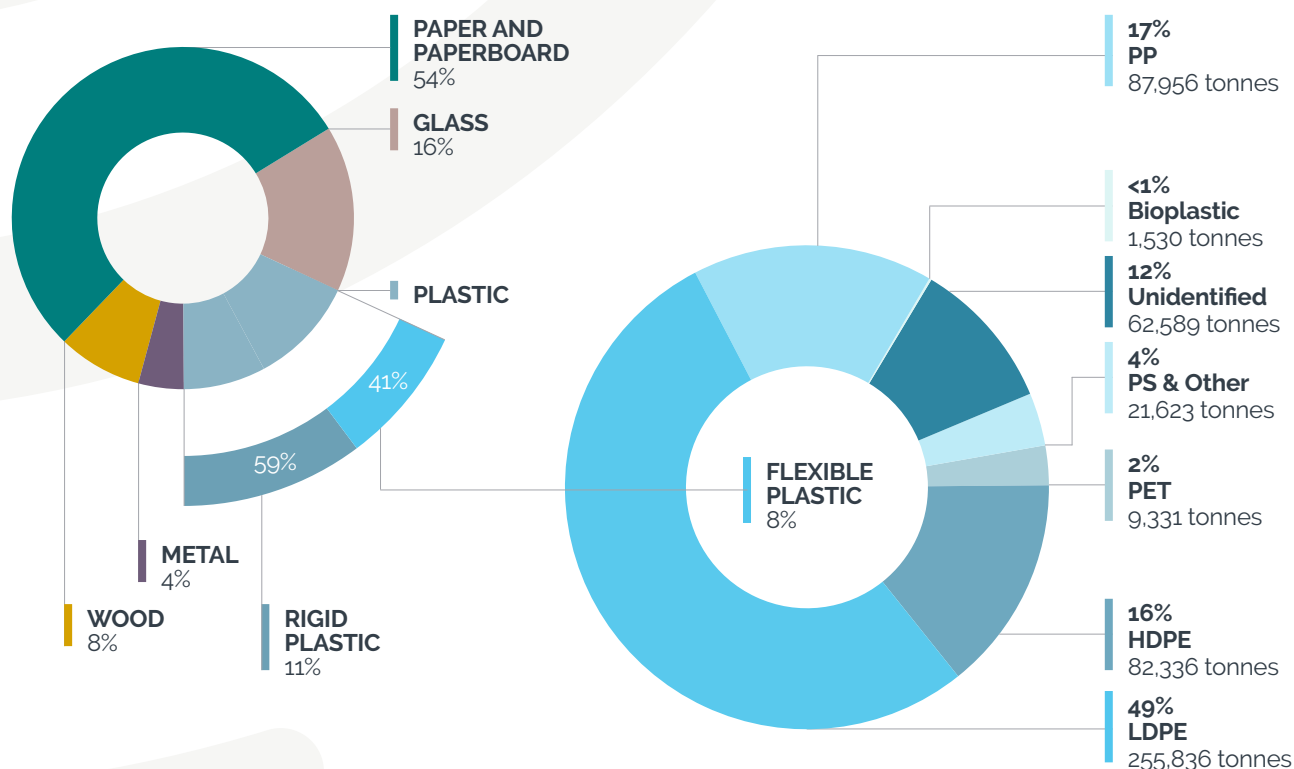
Material recovery



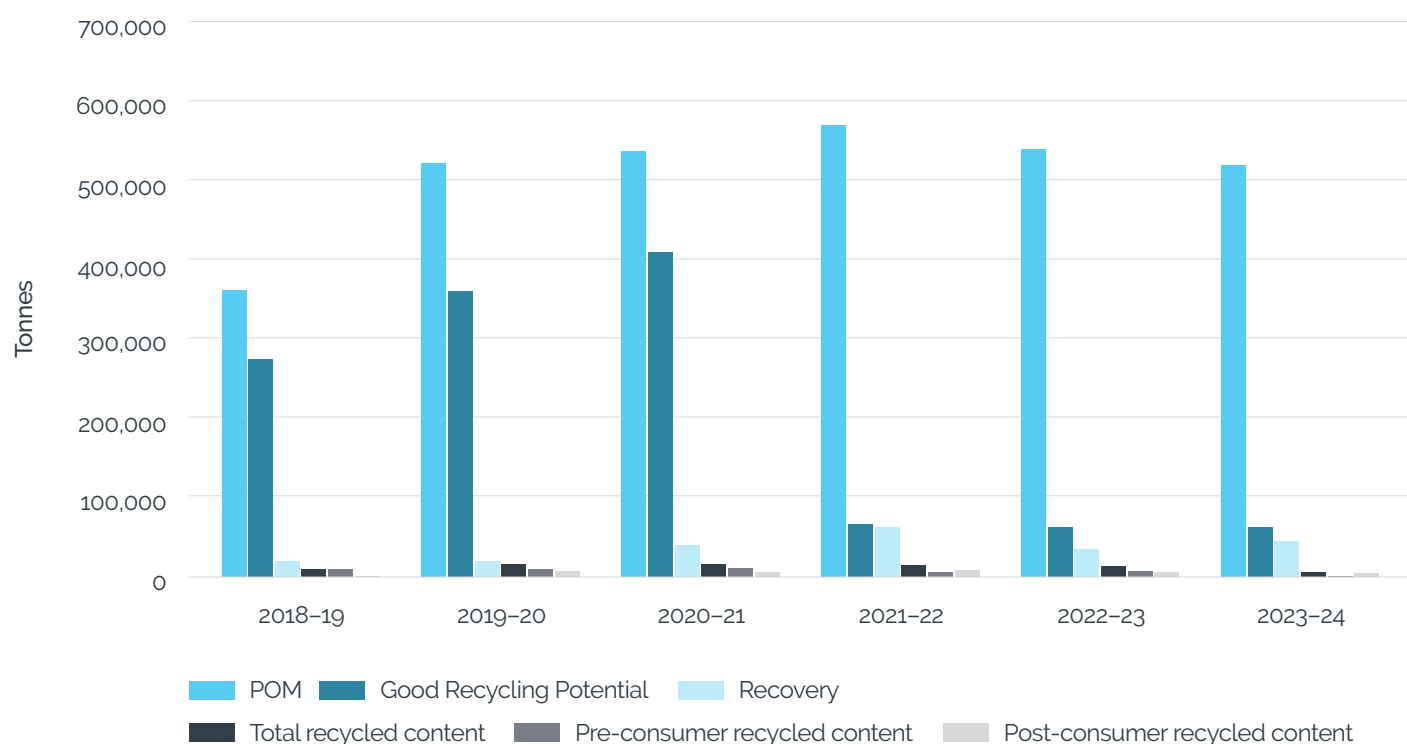
[†] Further explanation available on 'good recycling potential' [here](#).

Placed on market

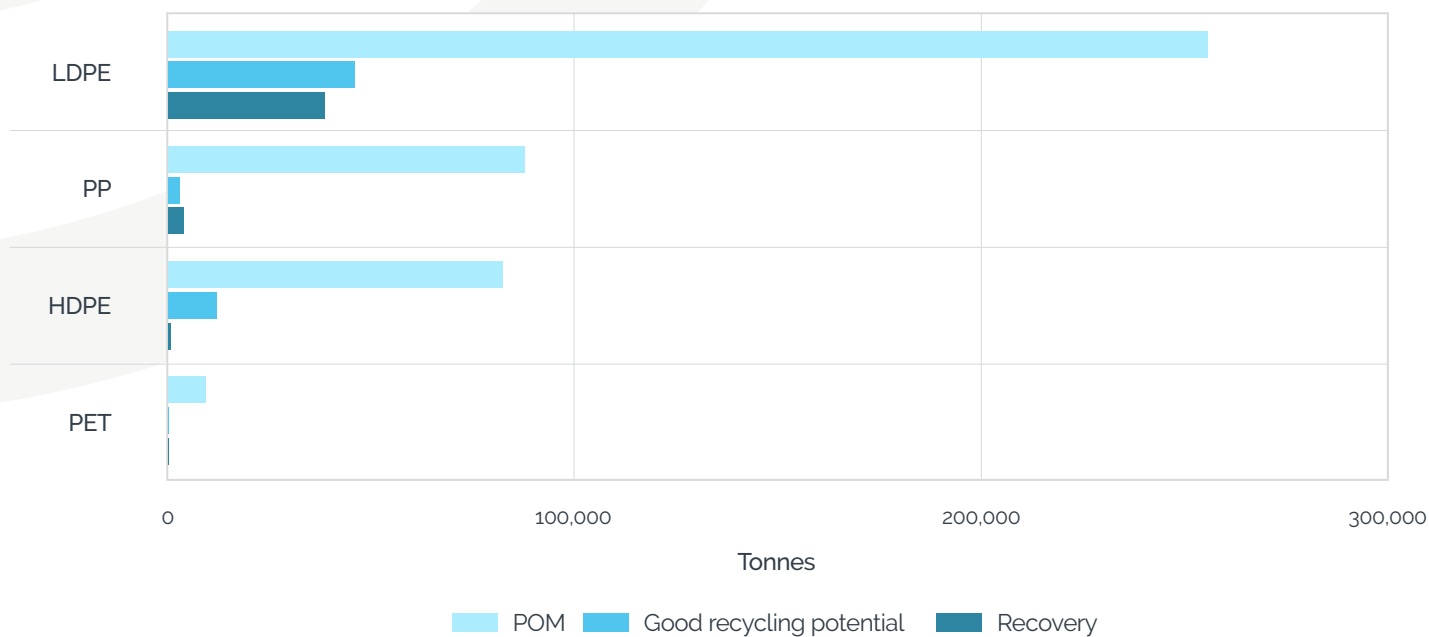
FLEXIBLE PLASTIC



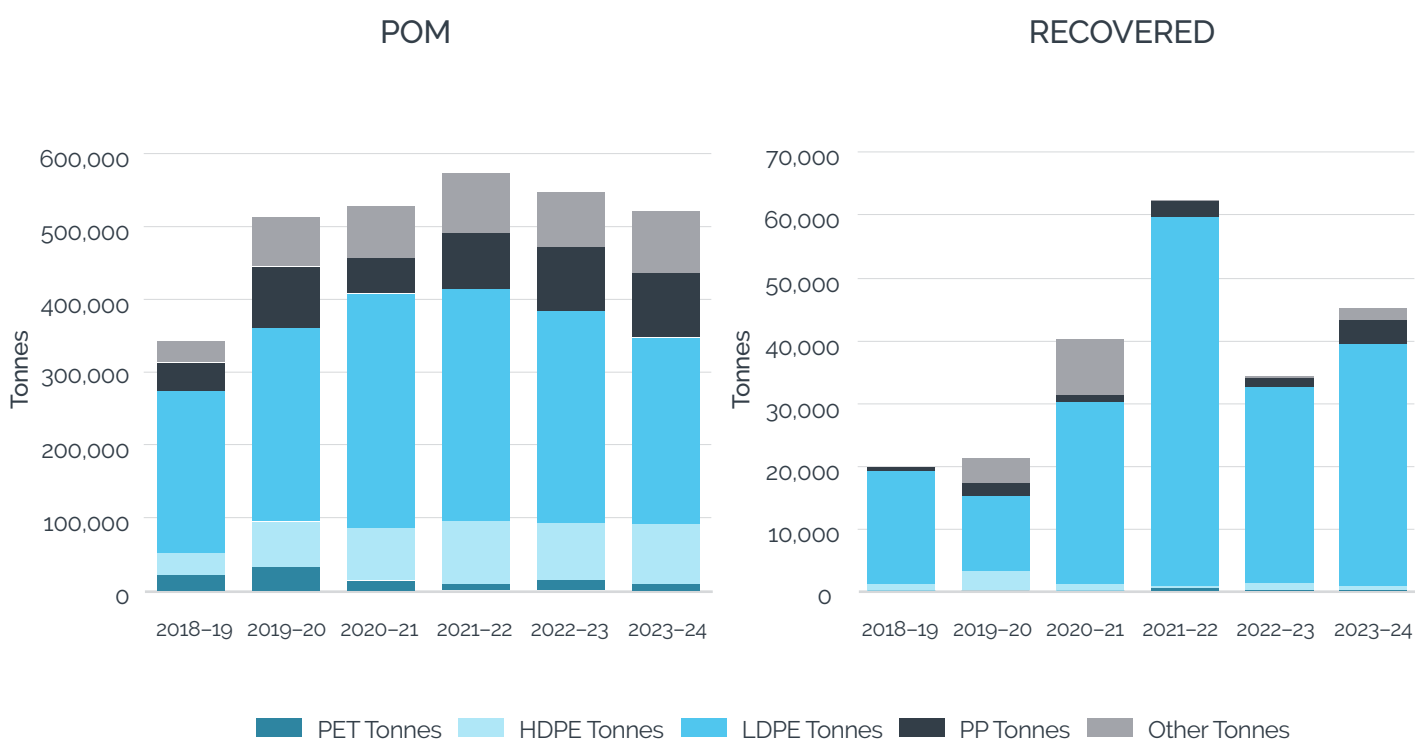
TRENDS



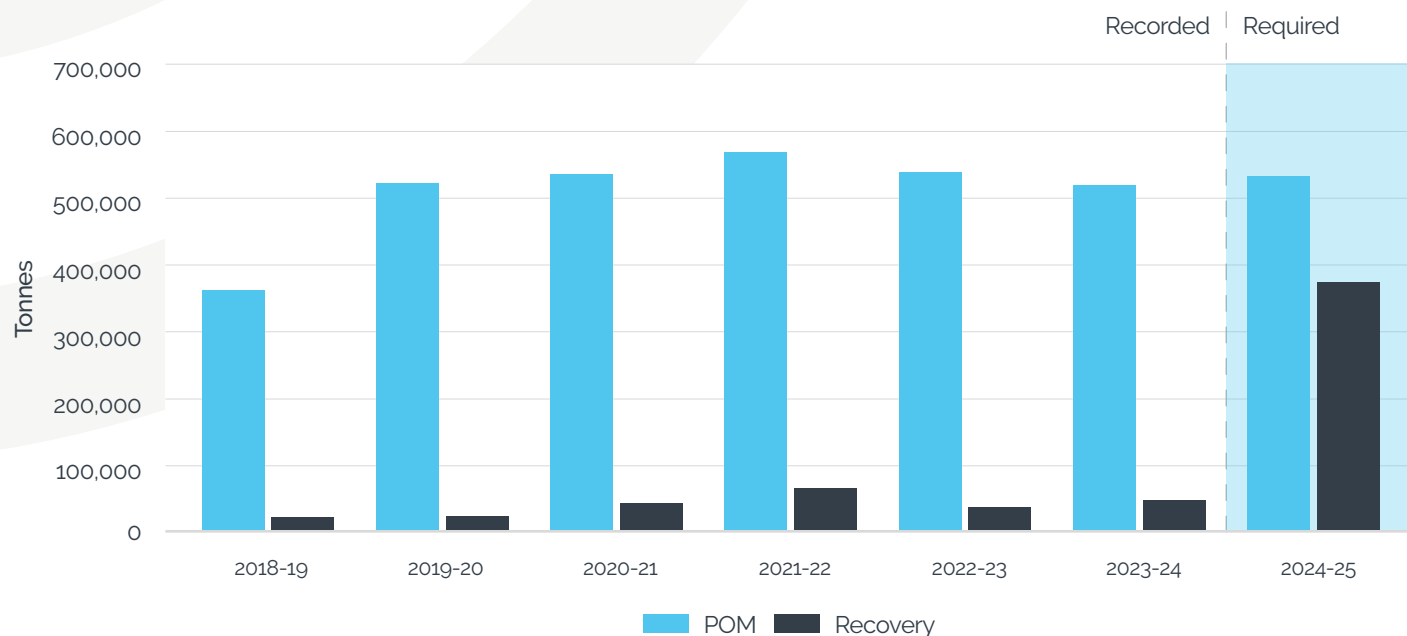
Polymer breakdown



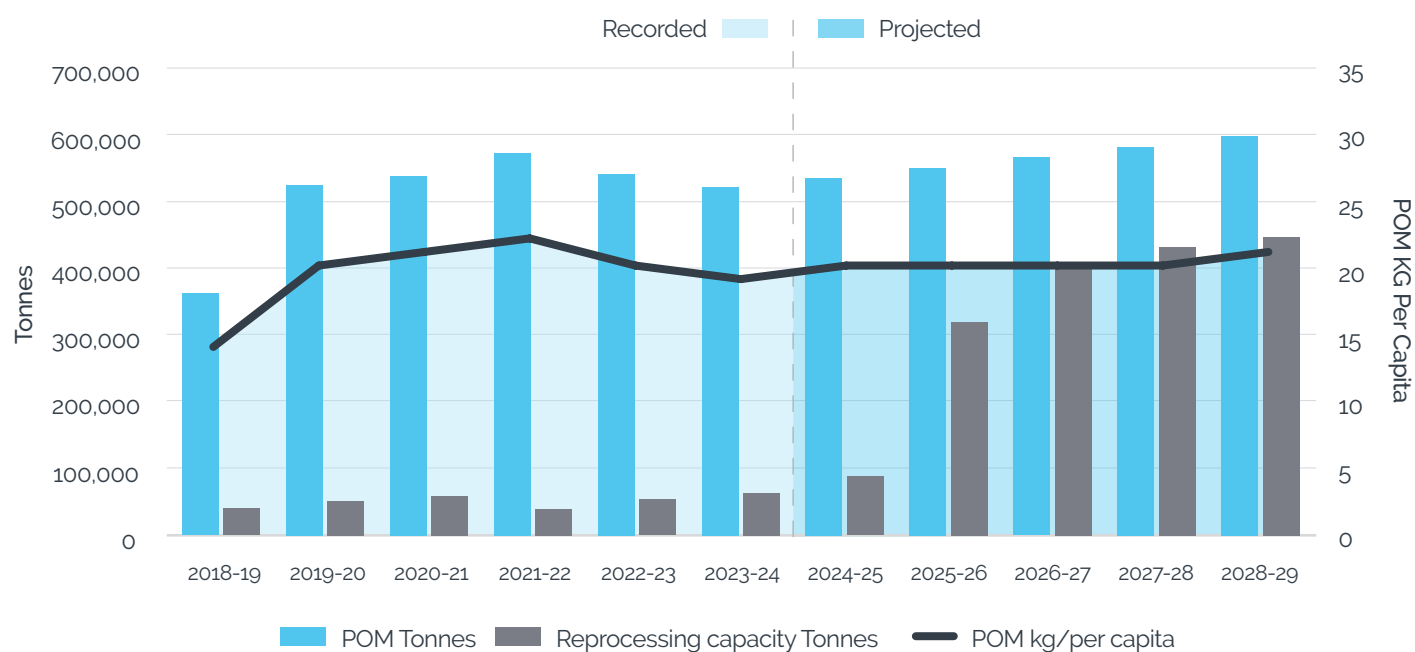
Polymer trends



Recovery required to meet targets



Reprocessing capacity



Top 3 priorities

FLEXIBLE PLASTIC

The following three groups represent 82% of all flexible plastic packaging POM in 2023-24.


	POM (tonnes)	Recovery (tonnes)	Pre-consumer recycled content (tonnes)	Post-consumer recycled content (tonnes)
LDPE	255,836	38,610	93	2,100
HDPE	82,336	606	0	1,834
PP	87,956	3,834	0	92

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)	2023 to 24 (tonnes)	2022-23 to 2023-24 change
Single-use HDPE shopping bags	159	81	100	–	–	N/A
Rigid PS	17,074	17,169	16,694	13,904	11,335	-18%
EPS	22,709	29,048	29,778	27,686	26,149	-6%
PVC	16,873	14,768	10,813	9,706	8,552	-12%
Oxo-degradable plastics	2,133	758	8	8	8	0%
Plastic tableware	25,225	13,224	18,694	19,323	16,452	-15%

Progress towards the National Packaging Targets

OUTCOME	TARGET	PROGRESS
 Packaging designed for circularity and sustainability	100% of packaging is reusable, recyclable or compostable	12% was classified as having good recycling potential
	Problematic and unnecessary single-use plastic packaging will be phased out	~46% reduction from the 2017-18 baseline <i>*All plastics</i>
 Harmonised and expanded reuse and recovery systems are in place	70% of plastic packaging is recycled or composted	9% was recovered
 Deep and resilient markets exist for recycled materials	10% recycled content included across Flexible Plastic <i>Target across all materials is 50%</i>	1% of Flexible Plastic was made with post-consumer recycled material

For more information on 2023-24 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.

Rounding of percentage data may result in discrepancies among totals. For more details, please refer to the Consumption and Recovery Report 2023-24.

Population data sourced from the Australian Bureau of Statistics – National, State and Territory Population data sets.

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