# Accelerating the Transition towards a **Circular Economy for Plastics**




**Transition to Circularity | Zwolle**

29 October 2026

**Thor Tummers**, External Affairs Unilever

# Global Branded Goods Company

Over

**400**
brands

**3.4bn**
people use our products every day

**~75%**
of turnover from our 30 Power Brands

**€9.4bn**
spend on Brand and Marketing Investment



# Schizophrenic Consumers



# Unilever Sustainability Goals

## Climate

Towards Net Zero emissions

By 2030

| | |
|---|---|
| 100% | Reduction in **Scope 1 & 2** GHG vs. 2015 |
| 42% | Reduction in **Scope 3** energy & industrial GHG vs. 2021 |
| 30% | Reduction in **Scope 3** forest, land & agri GHG vs. 2021 |

## Nature

Protect and regenerate nature

By 2030...

| | |
|---|---|
| 1m | Hectares of **regen. agriculture** |
| 1m | Hectares of **natural ecosystems** |
| 95% | Key crops **sustainably sourced** |
| Zero | **Deforestation** linked to SC (maintain as today) |
| 100 | **Water stewardship** programmes |

## Plastics

Work to end plastic waste

| | |
|---|---|
| 40% | **Virgin plastic** reduction by 2028 (vs. 2019) |
| 100% | **Reusable, recyclable, compostable packaging** by 2030 (rigids) & 2035 (flexibles) |
| 25% | Packaging uses **recycled plastic** by 2025 |

Plastic **collected & processed** > **packaging sold** by 2025

## Livelihoods

Enhance livelihoods for people in our value chain

By 2026...

| | |
|---|---|
| 50% | Suppliers signed **'Living Wage' Act** |
| 250k | **Small farmers** in our supply chain **access livelihood programmes** |
| 2.5m | **SMEs** in retail value chain **grow their business** |

Supported by $1 billion **Climate & Nature Fund**

Underpinned by our continued commitment to **Human Rights and Equity, Diversity & Inclusion**

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## Key Metrics

### TOTAL WEIGHT

Plastic packaging weight (new packaging) (2024)

654,880
metric tonnes

### VIRGIN WEIGHT

Virgin packaging weight (new packaging) (2024)

516,045
metric tonnes

### BASELINE WEIGHT

Baseline virgin plastic packaging weight (2019)

674,493
metric tonnes

### VIRGIN REDUCTION

2024 Virgin plastic packaging change since 2019

-23.49%

Target
-50%

### POST CONSUMER RECYCLED

Level of post-consumer recycled content in plastic packaging (2024)

21.2%

Target
25%

### REUSABLE

Plastic packaging that is reusable (2024)

0.1%

### DESIGNED FOR RECYCLING

Plastic packaging that is 'designed for recycling' (2024)

72.5%

### REUSABLE, RECYCLABLE OR COMPOSTABLE

Plastic packaging that is reusable, recyclable or compostable (2024)

56.9%

*NOT ALIGNED

The Global Commitment 2025 Progress Report - Unilever - Ellen MacArthur Foundation

Current incentives across the value chain are **(not)**

accelerating the transition to a circular economy

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## IMPACTFUL UPCOMING LEGISLATION

Ensuring compliance requires action beyond packaging design



European Commission

# New packaging rules for less waste and easier recycling

NEWS ARTICLE

- **less wasteful:** plastic packaging must be made in part from recycled content, with increasing targets for 2030 and 2040
- **fully recyclable:** all packaging must be recyclable by 2030, so its components can be used for something else afterwards
- **clearly labelled:** clear labels and colours make it easier to sort trash for recycling – showing what it is made of, where to bin it, and how to return it for reuse
- **smarter:** unnecessary packaging and empty space in deliveries will be reduced
- **easier to re-use, refill and collect:** deposit and return systems will be boosted. Companies must make reuse or refill options available whenever possible, with no extra charge
- **fairer and safer:** brands using non-recyclable or environmentally harmful materials will have to pay to clean them up. Harmful and cancer causing "forever" chemicals (PFAS) will be restricted in food packaging

## RISING COSTS & BUSINESS OPPORTUNITIES

Increasing packaging costs & EPR-fees, combined with major grants & subsidies



# Extra stimulans voor inzet van circulaire plastics uit Europa

*Verpact publiceert tarieven en kortingen voor 2027*

**Bedrijven die gerecyclede of hernieuwbare grondstoffen toepassen in plastic verpakkingen kunnen vanaf 2027 rekenen op aanvullende korting op hun afvalbeheerbijdrage. Met deze financiële stimulans wil Verpact bijdragen aan de beschikbaarheid en toepassing van circulaire grondstoffen en bedrijven ondersteunen bij de voorbereiding op toekomstige wettelijke verplichtingen.**

Plastic Nieuws28 september 2026

## TOP ENVIRONMENTAL CONCERN FOR CONSUMERS

Action is expected from customers & consumers, A-brands in particular, impacting the marketing mix



# Unilever accused of breaking plastics pledge as sachet sales approach 53bn

**Greenpeace says consumer goods group is badly off track to meet target of halving virgin plastic use by 2025**

# AT THE SAME TIME: CHALLENGING MARKET & PUSHBACK RE. POLICY/REGULATION

POLITICO

NEWS › SUSTAINABILITY

## UN plastic treaty talks collapse, again

Key sticking points included whether and how to regulate plastic products, the extent to which the measures should be legally binding, and financial support mechanisms.

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I·C·I·S Search ICIS

Home | Resources | Bankruptcy – are we losing momentum in Europe's recycling?

## Bankruptcy – are we losing momentum in Europe's recycling?

Whitepaper

### Bankruptcy – are we losing momentum in recycling?

Rhetoric surrounding the state of the recycling industry has been building over the past couple of years – and with it the threat of closures, bankruptcies and project cancellations. None more so than in Europe.

With headlines such as: '*The European plastic recycling industry is facing imminent collapse*', '*Industry in crisis*' and '*Can the recycling industry be saved?*', it is clear that these concerns run deep.

Calls to support the industry have gathered pace ever since European energy prices started to surge in 2022. At first, there was minimal actual disruption to overall supply, but the situation has changed dramatically over the past two years as recycling site closures have hit at an all-time high. The ICIS Mechanical Recycling Supply Tracker has identified 33 sites that reprocess PE, PP and PET that have closed between 2024 and 2026. Together this represents a combined capacity of just over half a million tonnes/year.

Clearly, concerns about the industry based on these closures are justified – but what is the cause?

FINANCIAL TIMES

EU business regulation + Add to myFT

## US demands EU dismantle green regulations in threat to trade deal

Washington wants American companies to be exempted from rules such as having to draw up climate transition plans



European Commission president Ursula von der Leyen, left, with Donald Trump at Turnberry, Scotland, in July © Andrew Harnik/Getty Images

**Alice Hancock** in Strasbourg and **Henry Foy** and **Andy Bounds** in Brussels

Published OCT 8 2025 | Updated OCT 8 2025, 13:49  367

# Theory: Building blocks to accelerate transitions



Credits: Markus Winkler

# **RAISING THE FLOOR** & LIFTING THE CEILING

**STIMULATING AT NATIONAL LEVEL**

**Commitments & projects initiated by individual companies with key suppliers, stimulated though policy**





**Legal requirements increasing progressively, enforced predictable mid-long term**

**FORCING AT EU-NATIONAL LEVEL**

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# **RAISING THE FLOOR** & LIFTING THE CEILING

**Encouraging innovation and frontrunners to accelerate the transition to a circular economy**

**Stimulating innovation through collaboration with knowledge institutions, start-ups, scale-ups, and (semi-)competitors**

## Sector leaders driving transitions

- Goals exceeding legal requirements, combined with public reporting
- Partnerships focused on innovation
- Pilots in practice to develop, learn & improve

**Sector agreement on circular design / 'eco-design'**

## Scaling efforts at sectoral-level

- Encouraging initiatives and cooperation
- Facilitating agreements within the sector (competition law)
- Making progress measurable

**Sector agreements on the use of circular and renewable materials**

## Minimal sustainability requirements in regulation

- Long-term objectives in framework legislation
- Impact assessments & revisions
- Level-playing field incl. non-EU
- Predictable mid-long term (e.g. increasing %)

**Amount of circular plastics increasing progressively**
(e.g. recycled plastic 0% to 40%)

**Consistent and clear regulations at EU level & Predictable for the medium & long term**

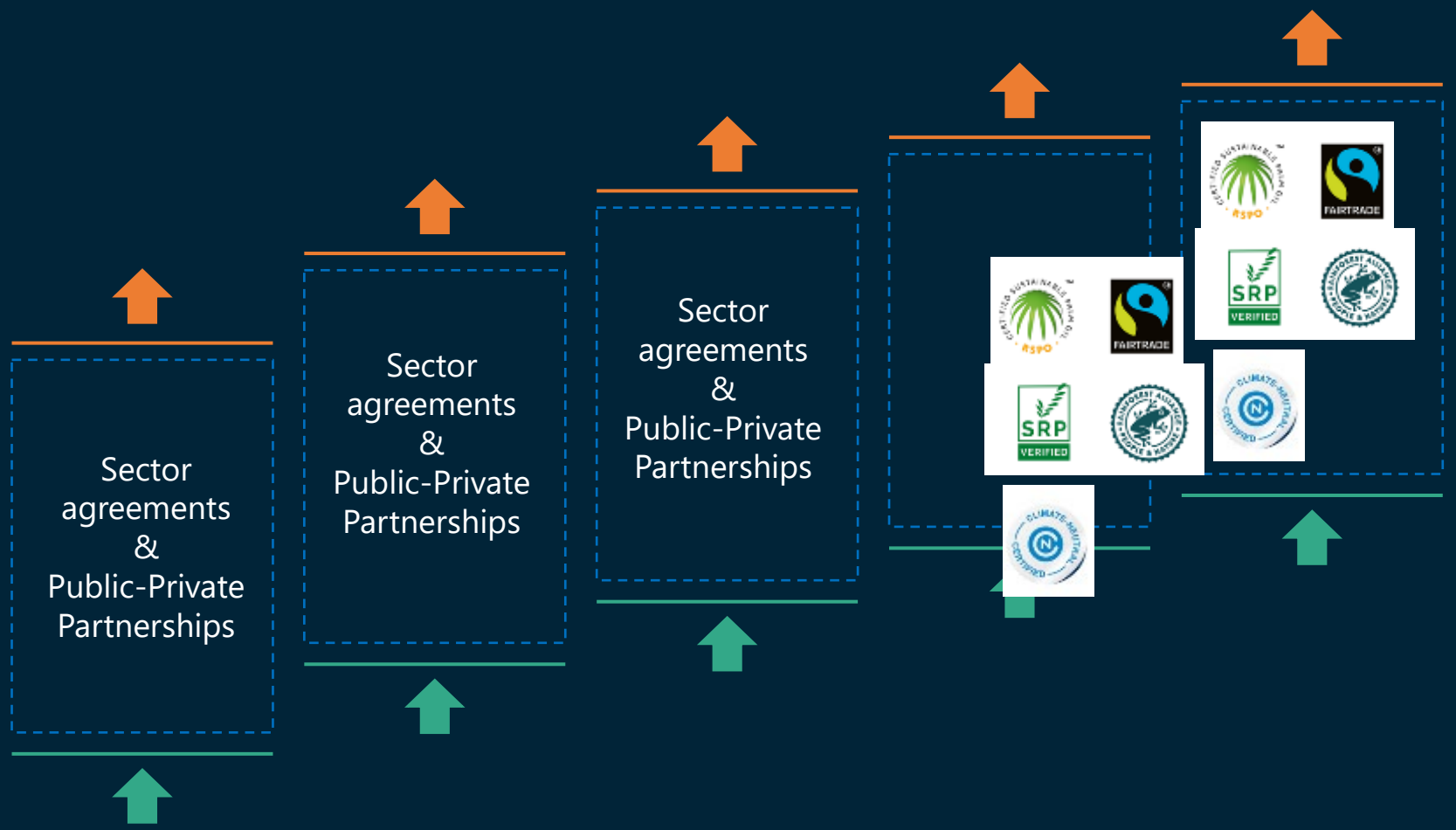
# Accelerating transitions: ‘Raising the floor & lifting the ceiling’

Ambitious commitments of individual companies / frontrunners

**Sector leaders**
- Commitment & milestones
- Public reporting & benchmarking
- Stimulated policy & measures

**Stepping-up as sector**
- Key sector players involved
- Public-Private Partnerships
- Removing (perceived) legal barriers

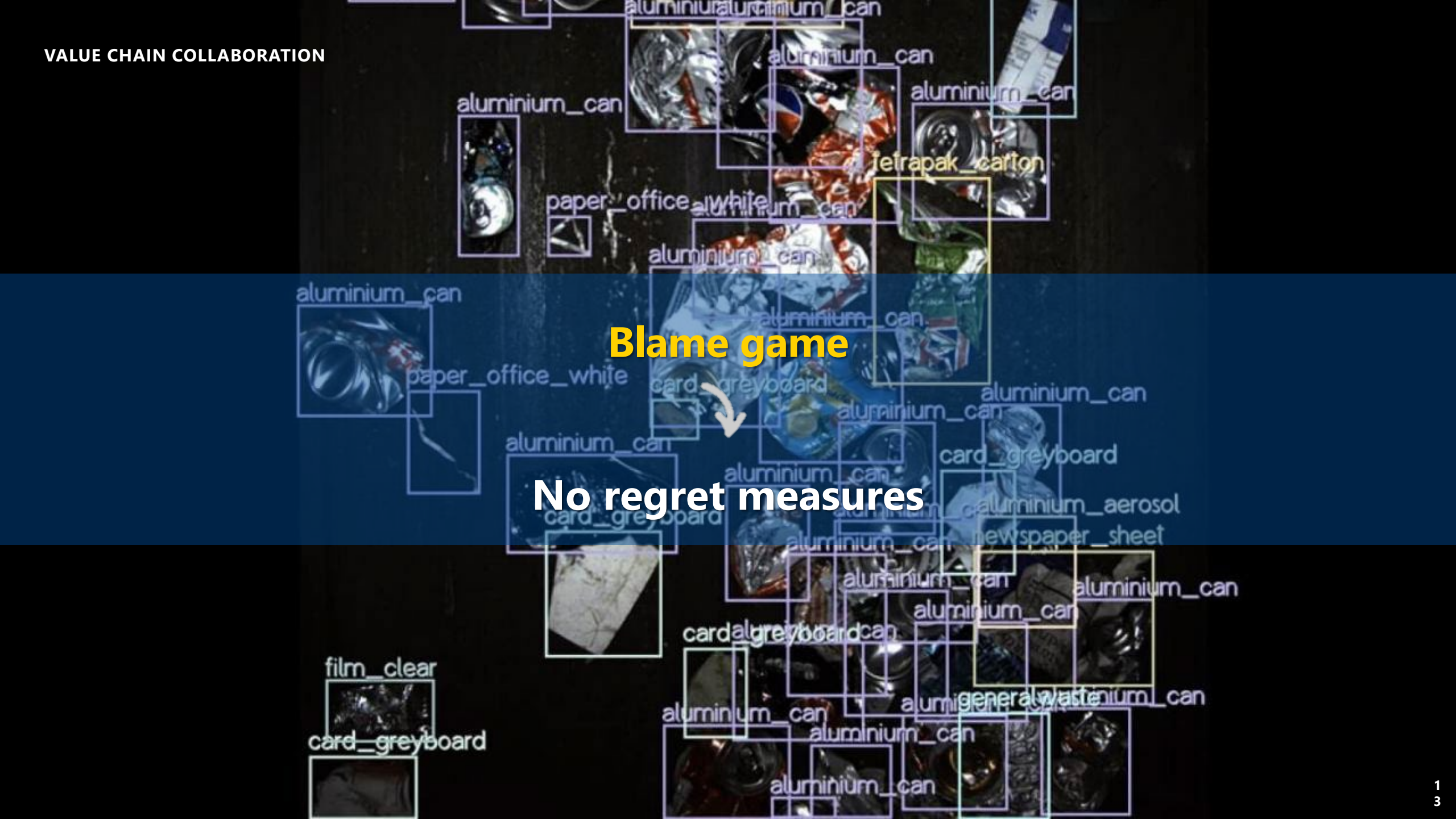
**Minimal requirements**
- Standards & requirements increasing YoY
- Predictable mid-long term
- Impact assessments & reviews




Level of ambition

Legal requirements increasing progressively, predictable mid-long term

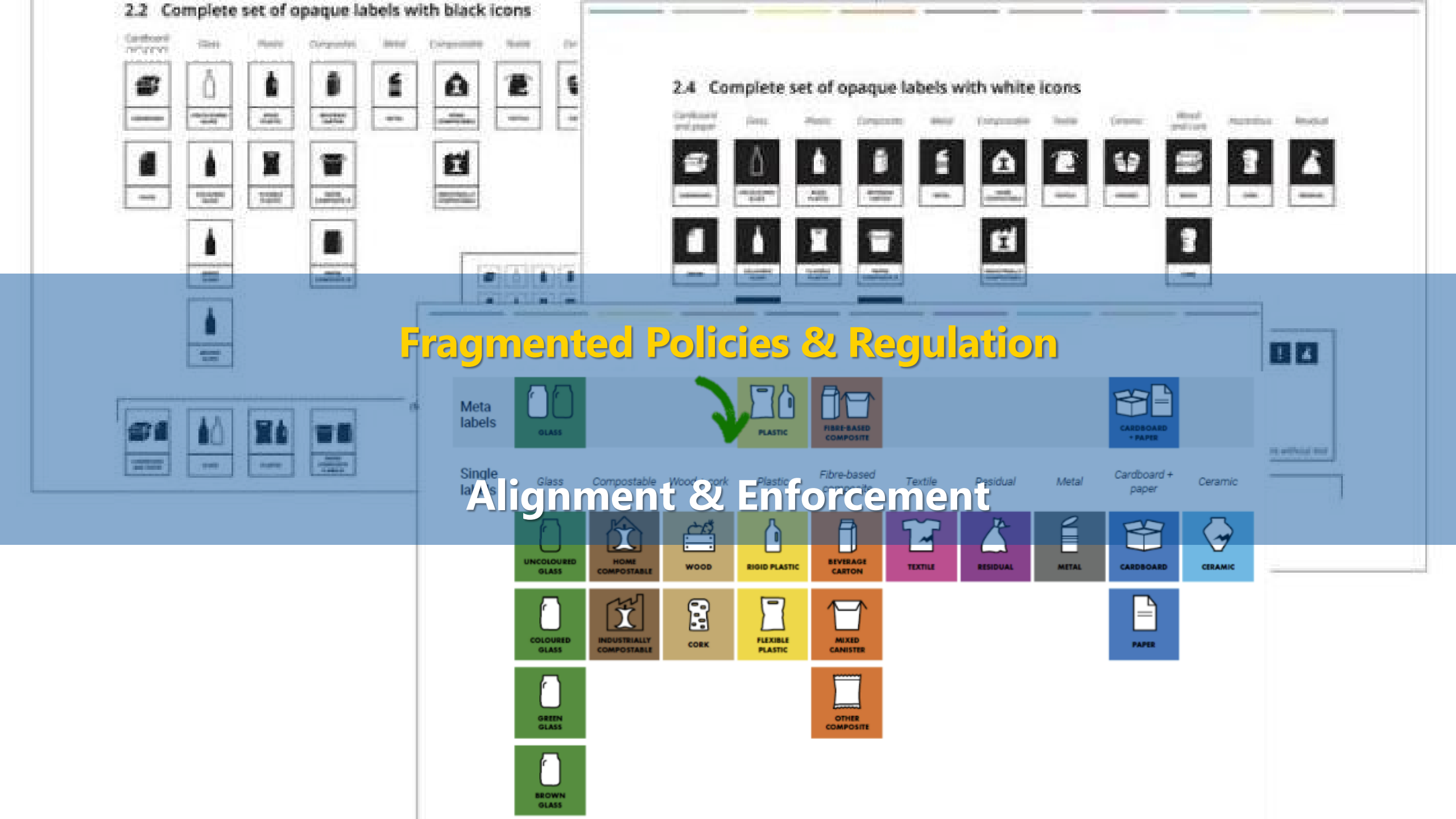
**Time**


Blame game
No regret measures



# Overpromises in slides & sheets

# validation in practice & innovation drive



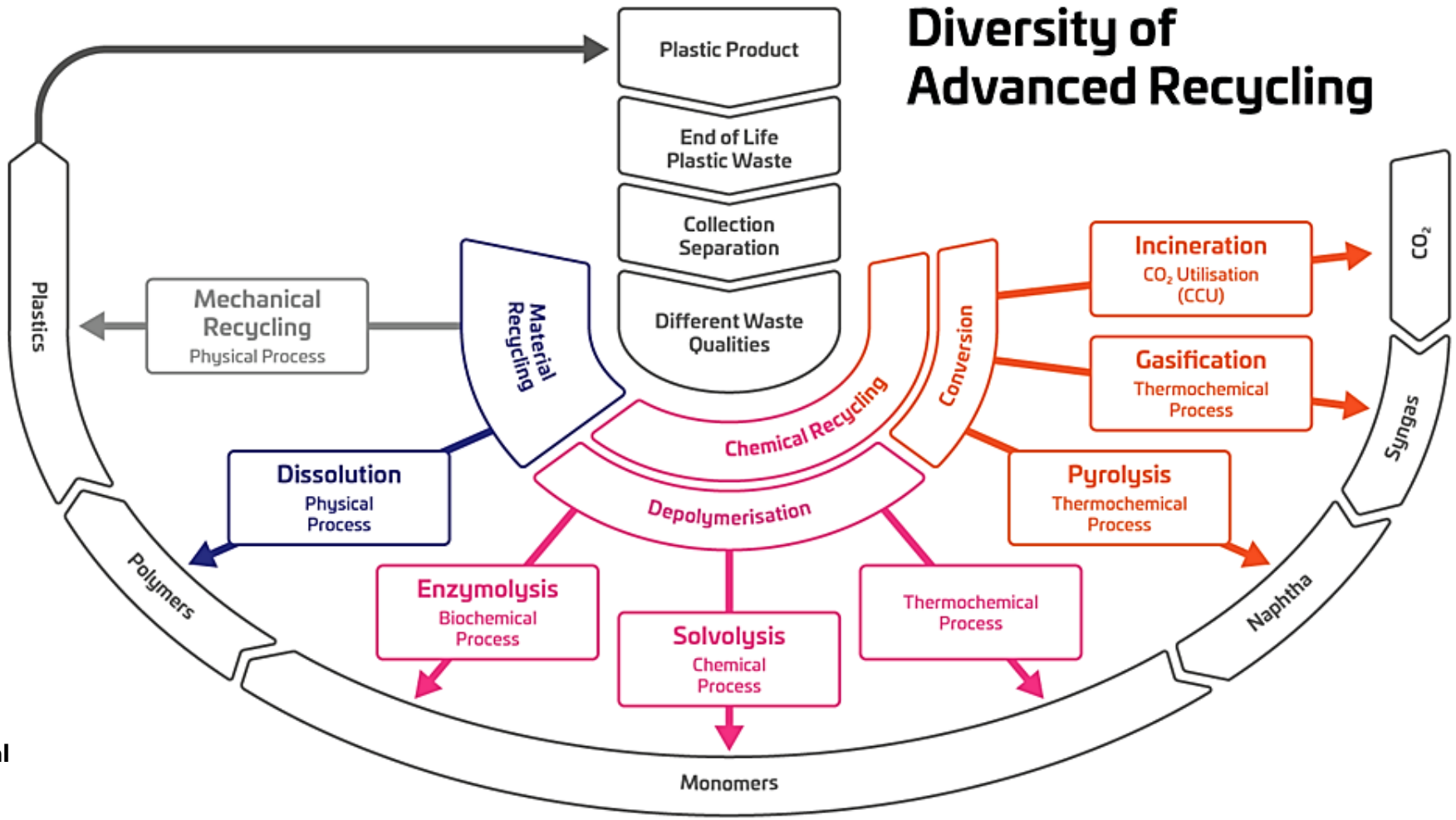

# Fragmented Policies & Regulation

# Alignment & Enforcement

# Circular Packaging: Direct influence on packaging design



# Recycling technologies: Specific pro's & cons




- **Scale | Availability**
- **Quality | EFSA-approval**
- **Price | Green premium**

Diversity of Advanced Recycling Technologies - Renewable Carbon



# Doorbraak in veelbelovende plastic pilots

Gepubliceerd: **28 november 2024**

OBBOTEC en Unilever werken samen aan nieuwe technologie, als oplossing voor moeilijk te recyclen plastic materialen.

COLLABORATION FOR IMPACT

# If we think we can do it alone, we are not thinking big enough!

**Experts and Academics**
Structural collaboration in Research & Innovation

**Business Partners**
Co-developing (precompetitive) innovative solutions with suppliers & competitors

**Consumers**
Communicate, develop solutions with high adoption rates and continuously learn & improve



**Local, National & European Governments**
Shaping enabling legal frameworks, with a view to international competitiveness

**Societal Organizations**
Pro-active sharing targets, approach & progress with external stakeholders

**Investors**
Strengthen the financial indicators and the business case for net-zero, low carbon, circular and biobased materials