



SOFT PLASTIC RECYCLING SCHEME

VOLUNTARY PRODUCT STEWARDSHIP SCHEME

ACCREDITATION REPORT 01.01.24.-31.12.24



1

SCOPE OF SCHEME

The scope of the Soft Plastic Recycling Scheme (The Scheme) includes the collection of post-consumer soft plastic packaging at designated retailers and drop off points. Soft plastic packaging consists of film made largely from LDPE (low density polyethylene), HDPE (high density polyethylene), PP (Polypropylene) and includes laminated or multi-layer plastics. Post-consumer flexible plastic includes bread bags, frozen food bags, toilet paper packaging, confectionery and biscuit wrap, chip bags, pasta and rice bags, courier envelopes, sanitary hygiene packaging, squeeze pouches and, in general terms, anything made of soft plastic which can be scrunched into a ball.

The Scheme accreditation excludes pre-consumer/ post-manufacturing / back-of-house soft plastic secondary or tertiary packaging. However, processing partners including Future Post, SaveBoard, Pact Recycling; TC Transcontinental Packaging and Polyprint Packaging/Polymer Processing collect these materials and have made tonnages processed available for this report.

The Scheme includes the funding of collection systems, transportation, and reprocessing of the plastic materials so that consumers can recycle their soft plastic packaging consumed at home, work or in public places. Since its accreditation in March 2018, the scope of the Scheme has changed to include paying New Zealand processors a gate fee for every tonne of post-consumer soft plastic material that they recycle.

Scheme members include manufacturers, brand owners that use soft plastic packaging, food and general merchandise retailers, and other organisations including the service sector that want to support and invest in soft plastic recycling.

In 2024 the Scheme commenced a trial of collecting soft plastic from 1,000 households in Nelson that opted in to a separate collection service working within the regulatory framework for kerbside collections.



Soft plastic kerbside collection trial in Nelson.

1.1 Reporting period

The Scheme achieved accreditation on 22 March 2018 with the accreditation period expiring on 31 March 2025. This report provides data from **1 January 2024 to 31 December 2024**.

1.2. Scheme governance

The Scheme operates under the governance of The Packaging Forum (PF) with its Board appointed from the PF's Schemes and Technical Advisory Groups. The Board is responsible for overall governance with financial governance provided by the PF's Finance & Risk Committee.

The Scheme has a Steering Committee which comprises representatives from its levy paying membership. The Steering Committee provides guidance to the Scheme Manager with regards to the operational management of the soft plastics collection service and approves the Scheme's budget. The Steering Committee met nine times during the calendar year 2024 with seven steering committee meetings and two project meetings.

The Scheme Manager reports to the Packaging Forum's Chief Executive with a dotted line report to the Scheme's Chair and is responsible for the day-to-day management of the Scheme.

Meetings and documentation for the Steering Committee are managed via Board Pro which manages agendas, recording minutes, communicating, and disseminating information, managing interests (conflict register) and formal voting positions (if required).

Steering Committee members are appointed for two-year terms at the Annual General Meeting which was held in July 2024. There were more nominations than positions available requiring an election.

SOFT PLASTIC RECYCLING SCHEME STEERING COMMITTEE

[APPOINTED JULY AT THE AGM]

COLIN BENZIE

Cas-Pak Products | packaging

DYLAN BROWN

PepsiCo-Bluebird | producer

STUART BURT

Amcor Flexibles | packaging

JAMIE GALLOWAY

Foundation Coffee | producer

DEBRA GOULDING SP Chair

Foodstuffs | retailer

CHRISTOPHER JURY

Goodman Fielder | producer

ROBERT LETHBRIDGE

Griffins | producer

ROBIN MCKAY

TCL Hunt | packaging

SCOTT MCKINNON

George Weston Foods | producer

MAO MAO

KMART | retailer

KERI-ANNE MARTIN

Nestle NZ | producer

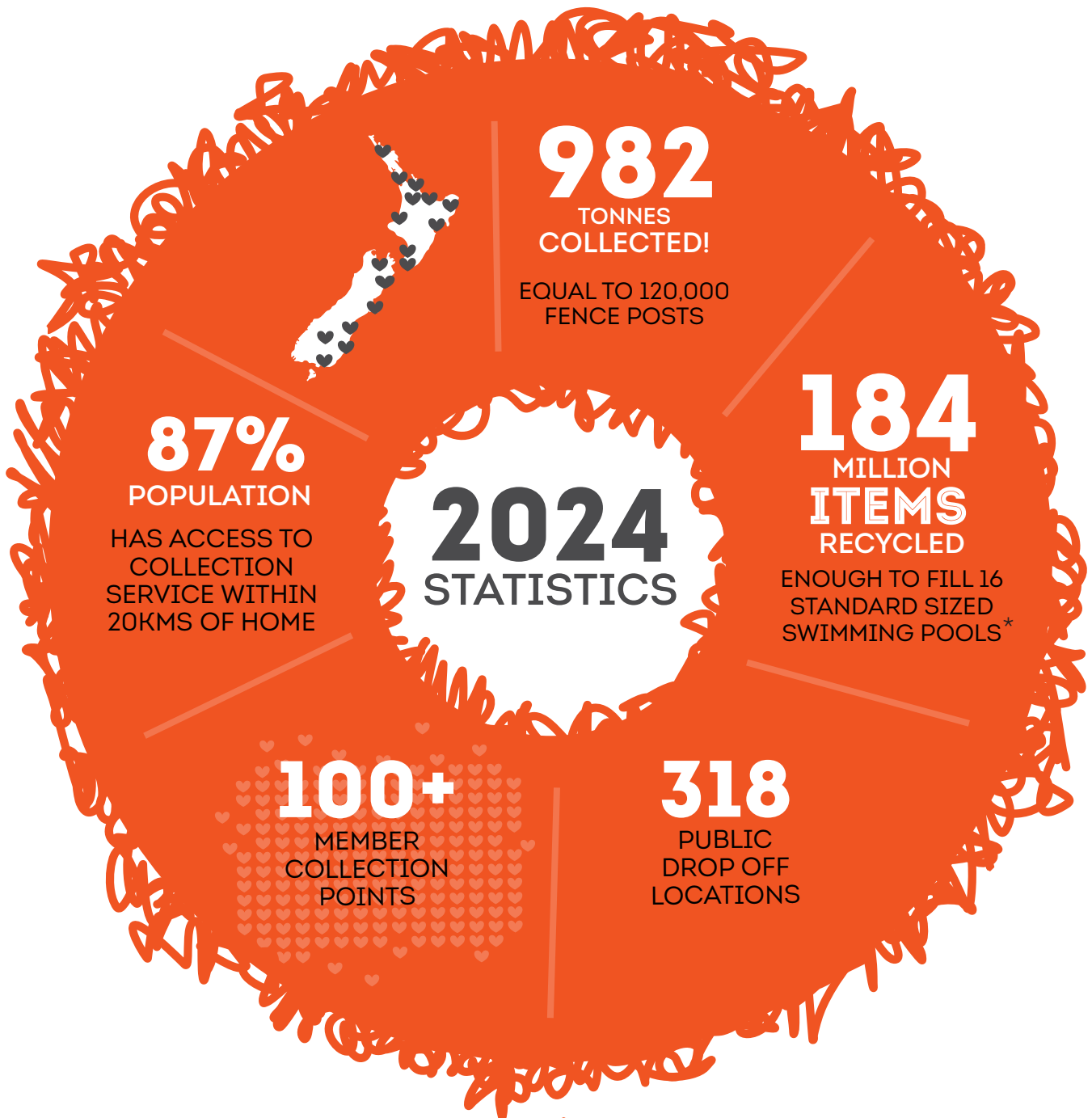
NICOLA VOICE

Woolworths NZ | retailer

2 REVIEW OF THE SCHEME

The Scheme's membership represents an estimated 82 percent of the post-consumer soft plastic packaging food and grocery sector. Members' levies fund collections from stores, quality checks, baling, transport to end markets, and pay an agreed rate per tonne also called a Gate Fee to cover the processing costs and to incentivise investment.

This is different from the traditional model where the processor pays the collector/recycler for the materials but is necessary to support and develop onshore reprocessing for "difficult to recycle" materials. Discussion with other Schemes overseas indicates that gate fee pricing is increasing as the cost of managing waste feedstock increases.



*Standard pool size of 12.5 metres



2.1 Membership

Scheme membership declined overall for the first time

As of 31 December 2024, the Scheme had 187 members, with 12 new members but recording a loss of 20 members due to brand consolidation, producers moving out of using soft plastic and businesses seeking to reduce their costs.

Members pay a levy based on their company turnover, and an understanding of the volume of soft plastic materials they place on the New Zealand market.

The Scheme has defined the resin codes which are acceptable to processors. The thresholds for materials accepted by the Scheme are shown in Chart 6 below. The Scheme measures total consumption using available industry market data for post-consumer soft plastic packaging which is acceptable through the Scheme.

In this report we include the total soft plastic consumption which has been identified through research conducted as part of the Plastic Packaging Product Stewardship Scheme design process.

Participation Levels in Scheme. Based on Circana data and an assessment of the brands placed on market in these categories by our members, the Scheme represents an estimated 82 percent of the soft plastic packaging post-consumer market for food and grocery products, as defined by the categories listed in Chart 3.

Chart 1. Membership

SOFT PLASTIC SCHEME MEMBERSHIP

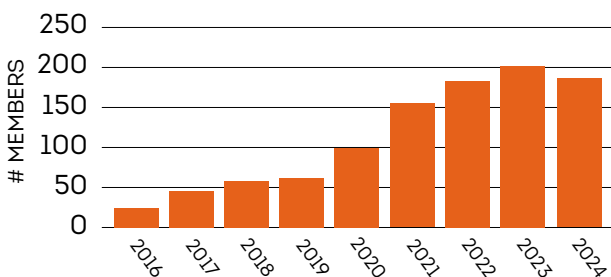
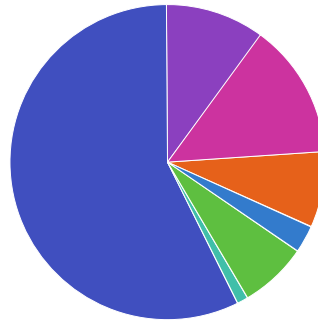


Chart 2. Members by category type

SOFT PLASTIC SCHEME MEMBER CATEGORIES 2024



- FOOD BRAND 107
- DRINKS BRAND 2
- GROCERY BRAND 13
- MANUFACTURER/DISTRIBUTER 15
- FOOD RETAILER 5
- OTHER RETAILER 26
- SERVICE/TOURISM INDUSTRY 19

Chart 3. Scheme members' estimated market share by category

CATEGORY	EST % SHARE OF TOTAL BY MEMBERS	UNIT SALES 2024
Bread bags	95%	129,587,590
Potato chips	90%	157,239,992
Biscuits	80%	103,352,211
Frozen food bags	70%	62,777,771
Confectionery	90%	154,143,129
Pasta, rice + noodles	50%	84,677,873
Breakfast cereal	90%	59,777,688
Toilet tissue	90%	35,974,619
Sanitary hygiene	85%	13,641,787
Kitchen towel	90%	14,033,984
Instant/freeze dried coffee	80%	17,819,854
Dairy (block/processed/grated)	90%	34,612,371
Fresh salad	50%	38,172,648
Bacon	70%	20,779,128
Fresh soups/meals	60%	3,742,290
Dry cat food	80%	8,834,735
Dry dog food	80%	4,378,643
Frozen poultry + meat	70%	21,732,102
Frozen seafood	70%	23,203,156
Chilled seafood	70%	9,320,688
Other courier bags/meal kits	90%	50,000,000
Total	82%	1,047,802,256

Unit sales source: Circana 12 Months MAT /Scheme membership by category

MEMBER COMPANIES

AA
 Abe's Bagels
 Absolute Wilderness
 AB World Foods
 ACCO Brands NZ
 All Good Bananas
 Amcor Flexibles
 Ames Australasia
 Anglesea Hospital
 Arnotts Group
 Aroa Biosurgery
 Arvida Retirement
 Asaleo Care
 ASB
 Ashley and Co
 AsureQuality
 Back Country Foods
 Bluebird
 Blue Frog Breakfast
 BNZ
 Bon Accord
 Braemar Hospital
 Breadcraft
 Bremworth Carpets & Rugs
 Broken Heart Spirits
 Bunnings
 Calbee Australia
 Cas-Pak Products NZ
 Ceres Organics
 Chantal Organics
 Chobani Pty
 Clorox
 Coca-Cola Europacific Partners
 Colgate
 Cottonsoft
 Countdown
 Dairyworks
 Daltons
 Dark Horse Coffee
 D M Dunningham
 Dole NZ
 EIT Hawke's Bay Campus
 Endeavour Consumer
 Enphase Energy
 Epic Coffee
 Epic Dairy
 Farrah's
 Ferrero Australian Pty
 Flight Coffee
 Freightways
 Fonterra
 Foodstuffs
 Foodstuffs NZ
 Foundation Coffee
 Frucor
 FSL Foods
 Furtex
 Gaults
 General Mills
 Genius Pet Food
 George Weston
 Giannis Pita Bread
 Goldie Wholefoods
 Goodman Fielder
 Good Nature
 Griffins
 Hally Labels
 Hanes
 Happypet
 Hasper Brand Labs
 Harraways & Sons
 Havana Coffee
 Healthy Kelsi
 Heartland Chips
 Heinz Watties
 Hello Fresh
 Hubbards
 Inghams & Bostock Brothers
 Integrated Packaging
 Jacobs Douwe Egberts
 Jenkins Freshpac
 J&J
 JNTL Consumer Health (NZ)
 Just Lemon Marketing
 Kaipara Kumera
 Karajoz Coffee Company
 Kathmandu
 Kelloggs
 Kimberly Clark
 Kiwi Property
 Kmart
 KPL Distribution
 LIC Diagnostics
 Life Health Foods
 Little Beauties
 Living Green NZ
 Loft Foods
 Lululemon
 Lyttelton Port Company
 McPhersons Consumer Products
 Makmar
 Mars NZ
 Masterpet ANZ
 Meadow Mushrooms
 Mercy Hospital Dunedin
 Mexicano
 Midlands Apiaries
 Mitchells Nutrition
 Mondelez
 Mother Earth
 Mrs Rogers
 My Food Bag
 Natural Pet Foods Group
 Nestle
 Nibblish
 Nulon
 NZ King Salmon
 NZ Post
 NZ Sugar
 Oceania Healthcare
 Offshoot (NZ)
 O.F Packaging
 Omega Seafoods
 Only Organic
 Oob Foods
 Oriental Cuisine
 Pams
 Paramount Safety Products
 Perfetti Van Melle Export Far East
 Peru Café
 Pharma Care NZ
 Pitango
 Polyprint
 Precinct Properties NZ
 Procter & Gamble
 Prodotti D' Italia
 Proper Crisps
 Pure Delish
 Quantum Pacific
 Ravensdown
 RB Hygiene New Zealand
 Real Pet Food Company
 Real Rad Food
 Resene
 Sanitarium
 Sanford
 Scalzo Foods
 SC Johnson
 Sealed Air
 Sealord
 Sea Treasure Seafoods
 Secret Kiwi Kitchen
 Serious Food Co.
 Silver Fern Farms
 Simplot
 Sleepyhead
 Smales Farm
 Smart Foods
 Snell Packaging
 So Sweet
 Stratex Group
 Sunrice
 Super Retail
 Swisse Wellness
 SWP Commercial
 T & G Global
 Tasti
 TCL Hunt
 TC Transcontinental Packaging
 Tegel
 The Baron
 The Lactation Station
 The Warehouse
 T Leaf T
 Tui Products
 UCC Coffee NZ
 Unilever
 Uno Loco/Hula
 Venerdi
 Vitaco Health (NZ)
 Weaver Cacaco
 Wellington Chocolate Factory
 Wellington Regional Hospital
 Westpac
 Whittaker & Sons
 Woodhaven Gardens
 Woolworths
 WOOP
 Yates
 Z Energy

2.2 Stakeholder Relationships

The Scheme has a major focus on communicating with the consumer as reported in Section 5 below. In March 2024, Horizon Research found that 59 percent of respondents have heard that they can recycle their soft plastic bags and packaging (same as in 2023). When shown an image of the soft plastic recycling bins, 60% (2,484,000 adults) said they had seen them, up from 56% in 2023.

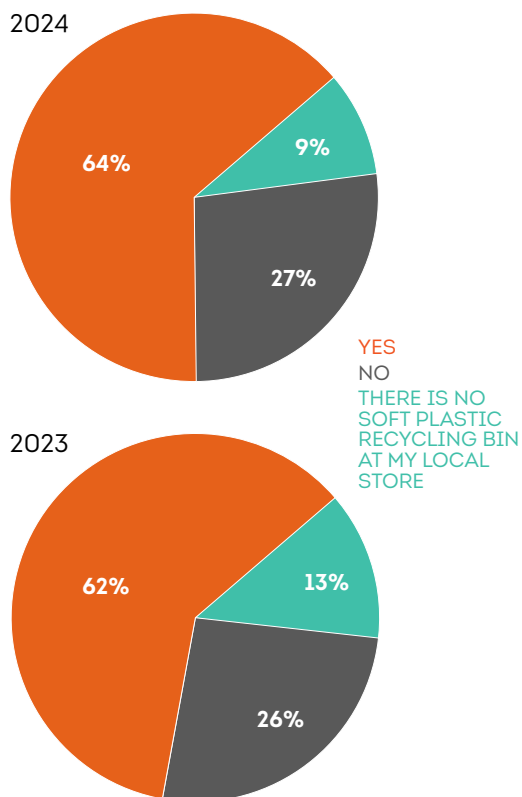
27% (1,016,000 adults) said they had recycled soft plastics at their local store. There is little change in the use of soft plastic bins since 2023.

Respondents were told all the plastic collected through the Soft Plastics Scheme is sent to processing facilities in New Zealand and made into new products.

They were then asked what they thought of the Scheme.

- **58%** (2,373,000 adults) support the idea of recycling soft plastics in New Zealand.
- **25%** (1,015,000 adults) were unaware of the Scheme.
- **10%** (404,000 adults) were aware of the Scheme.

HAVE YOU RECYCLED YOUR SOFT PLASTIC BAGS AT YOUR LOCAL STORE?



Future Posts garden beds

Stakeholder Relationships

The Scheme works with the NZ Food & Grocery Council (NZFGC); Retail NZ; Plastics NZ, The Australian Packaging Covenant Organisation (APCO); Australian Food & Grocery Council (AFGC), WasteMINZ and others to drive awareness of soft plastic recycling. The Packaging Forum is a member of EXPRA (Extended Producer Responsibility Alliance) joining 33 national packaging product stewardship organisations and a member of Recoup UK which is the UK's leading authority on plastics resource efficiency and recycling. Membership of these global organisations provides greater opportunities for the Scheme to share its story and to learn from overseas experience.

To amplify awareness, soft plastic recycling is promoted in Local Government Magazine, Supermarket News and FMCG Magazine, and via social media channels - including the Scheme's own Facebook page. In addition, the Scheme receives

and responds to requests for information from community groups, schools, and the media. There are ongoing requests for information via the Scheme's Facebook page.

The Scheme works with councils where there is a collection service to engage the local community. The Scheme is available in 46 territorial authority regions and 76% of these councils promote the Scheme on their website or social media.

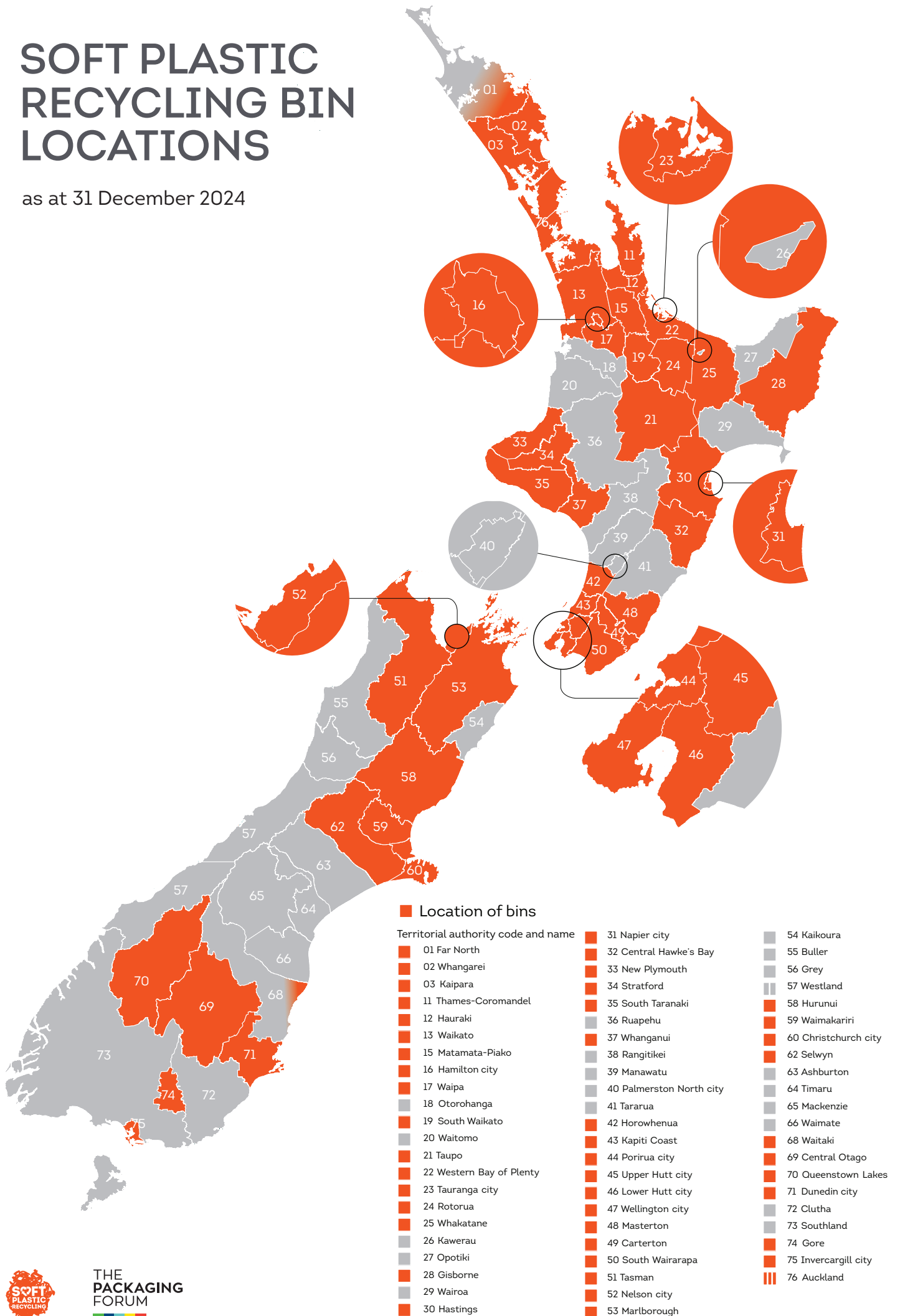
The Scheme actively promotes the need for local and central government, as well as industry, to purchase products made from recycled soft plastics to create demand and challenges organisations to only say they are recycling if they "Buy Recycled".

Annual soft plastic audit



SOFT PLASTIC RECYCLING BIN LOCATIONS

as at 31 December 2024



3 WASTE GENERATION: MASS BALANCE

3.1 Methodology

Scheme members are encouraged to provide plastic consumption data to the annual NZ Food & Grocery Council's plastic consumption survey to understand the amount of soft plastic placed on the market in New Zealand by resin type and colour. This survey has been used to inform the Plastic Packaging Product Stewardship Scheme design. The survey results are limited to the availability and accuracy of data submitted to Dynata but is the best available dataset.

It is estimated that the **food & grocery** sector consumed around 30,000 tonnes of soft plastic which is 30% of the estimated 99,000 tonnes of consumer plastic consumed annually by the sector.

This equates to 6kg soft plastic consumed per capita per annum.

By comparison in:

- UK plastic films and flexibles represent 24% of total household plastic packaging placed in the market¹ or around 324,000 tonnes equivalent to around 4.74kg per capita².
- Australia placed 308,000 tonnes of LDPE film on the market equivalent to 11.5kg per capita

To increase the recyclability of soft plastic, the global market is shifting towards mono-polymers aligned to the CEFLEX guidelines. An estimated 51% of the soft plastic placed on the market in New Zealand is multi-layer which may currently be recyclable but with expected changes to materials thresholds by the Scheme in 2027 may be outside the future acceptable thresholds for recycling.

Category Sales

In line with previous report years, the unit sales of bags by type has been calculated from information supplied by Circana New Zealand. This provides a different perspective from the tonnages identified through the Dynata survey and allows the Scheme to monitor changes in category usage.

The average weight per item is calculated from the audit conducted by Waste Not Consulting in May 2023 adjusted with technical input from the Steering Committee.

The unit sales of food and grocery items packaged in soft plastics is consistent with 2023 data with 1,147,802,256 units placed on market (variation 1%). The average weight of a bag is 7.79 grams. On this basis an estimated 8,914 Tonnes of post-consumer soft plastic packaging was consumed across the specified categories.

Improving Data

The Scheme will continue to assess how to improve the data capture of soft plastic packaging placed on the market. 24% of Scheme members are now in the general merchandise; clothing or other categories and the Scheme does not currently have access to these volumes.

GS1 data requirements for the National Product Catalogue now include recording plastic by resin type and colour for all new products. These ongoing improvements to data capture will help improve the robustness of the Scheme.

Implementation of a Plastic Packaging Product Stewardship Scheme will require a comprehensive plastic material flow dataset.

1 UK Household Plastic Collection Survey 2024 - Recoup

2 APCO Packaging Consumption & Recovery Data 2022-2023

Chart 5. Estimated volume of soft plastic bags by category

BAG TYPE	UNIT SALES 2024	AVE WEIGHT GRAMS	TOTAL TONNES	
			2024	2023
Bread bags	129,587,590	7.25	940	943
Potato chips	157,239,992	7.1	1116	1136
Biscuits	103,352,211	3.81	394	393
Frozen food bags	62,777,771	9.94	624	623
Confectionery	154,143,129	2.23	344	328
Pasta, rice & noodles	84,677,873	6.54	554	552
Breakfast cereal	59,777,688	10	598	601
Toilet tissue	35,974,619	12.09	435	423
Sanitary hygiene	13,641,787	12.09	165	161
Kitchen towel	14,033,984	12.09	170	163
Instant/freeze dried coffee	17,819,854	4.86	87	86
Dairy (block/processed/grated)	34,612,371	6.14	213	203
Fresh salads	38,172,648	10.14	387	387
Bacon	20,779,128	10.95	228	234
Fresh soups/meals	3,742,290	10	37	36
Dry cat food	8,834,735	12.8	113	116
Dry dog food	4,378,643	12.8	56	57
Frozen poultry & meat	21,732,102	10.95	238	218
Frozen seafood	23,203,156	9.94	231	229
Chilled seafood	9,320,688	14.44	135	141
Other - courier bags/meal kits	50,000,000	12.55	628	628
Other - garden/reusable bags	100,000,000	12.55	1255	1255
Total	1,147,802,256		8945	8914

Acceptable plastic resins

The material thresholds are integrated within APCO's Australasian Recycling Label and have not changed in the report year.

The Scheme has started consultation with members about transitioning towards material thresholds for soft plastics requiring greater than 80% of polyolefins plus up to 20% secondary materials with no component exceeding 10% for recycling in New Zealand to align with Australia.

However, the New Zealand Scheme will not make any changes to its material thresholds with proposals for implementation in 2026 for new products or 2027 for existing products or as determined through the design of a mandatory plastic packaging product stewardship Scheme (PPPS).

The Scheme continues to investigate new processing systems including advanced recycling which will accept a broader range of resins (typically still excluding PVC, Extended Polystyrene and compostables).



Chart 6. Materials Thresholds Table

The Scheme currently accepts materials which are plastics resin code 2, 4, 5 with acceptance of resin codes 1 and 7 in a blended mix with the primary plastic. Secondary materials must be less than 30% in total across all secondary material types, and primary materials (HDPE; LDPE; PP) must be a minimum of 70% by weight.

		SECONDARY MATERIALS %											
		PET	HDPE	PVC	PVDC	LDPE	PP/BOPP	PS	NYLON	EVOH	COMPOSTABLE PLASTIC	PAPER/LABELS	FOIL
FLEXIBLE LAMINATE													
PRIMARY POLYMER	PET												
	HDPE	30						30	30		30	30	
	PVC												
	LDPE	30						30	30		30	30	
	PP	30						30	30		30	30	
	PS												
	NYLON												
	COMPOSTABLE												

LEGEND

COLOUR LIMITS	FUTURE POST CLASSIFICATION	ACCEPTED
primary polymer	recyclable	yes
secondary polymer	recyclable in a blended mix	yes
not accepted for recycling	not recyclable	no

The range of acceptable plastics is governed by what can be processed in New Zealand at present.

3.2 Collection

The Scheme measures tonnes collected from monthly records from the network of service providers as a requirement for payment.

In Auckland, and some other parts of Upper North Island, Woolworths NZ and Foodstuffs' stores bale the bags of soft plastic at the store and these bales are transported to Future Post, Waiuku. My Food Bag and WOOP also have return services for their customers, and these are baled by our collectors in the relevant regions. There is also a courier bag return service available in partnership with NZ Post.

The methodology for calculating the tonnes of soft plastic collected is based on the average weight of the

240-litre bag used for collections. In March 2025, an audit was conducted by Sunshine Yates Consulting of bags at four sites (Abilities, Redline, Earthlink and Kilmarnock) which represent 70% of the material collected by the Scheme's contracted collectors. This finds the average bag weight to be 5.4kg which has been used retrospectively to calculate the tonnages for 2024 collections.

Chart 7. Collections by region and percentage share

REGION	COLLECTOR	% SHARE 2024	% SHARE 2023
Northland	Waste Mgmt	1.4	1.9
Auckland/Upper NI	Retail Logistics	33	26.7
Auckland & Waikato	Abilities	10.8	13.3
Thames Coromandel	Smart Enviro	2.1	1.9
Hauraki	Hauraki DC	1.1	1
Tauranga	Redline	5.9	6.2
Gisborne	WFL	0.5	0.7
Hawke's Bay	The Bin Co	4	4.3
Whanganui*	Whanganui Res Recovery	0.6	-
Wellington Kapiti & Masterton	Earthlink	15.4	19.5
Nelson/Tasman	Enviro NZ	3.43	1.3
Marlborough	JBL	1.2	0.4
Christchurch/Canterbury	Kilmarnock	14	18.1
Oamaru	Waitaki RR	1.7	2
Dunedin	Cargill	3.6	1
Central Otago	AllWaste	0.6	0.4
Invercargill/Gore*	Recycle South	0.2	-
Nationwide courier bag	NZ Post	0.5	1.1

* commenced in June 2024

Local collections to local processors

- 1 Northland **Waste Management**
- 2 Auckland **Abilities, Redline, Foodstuffs, Woolworths**
- 3 Thames Coromandel **Smart Environmental**
- 4 Hauraki **Hauraki Council**
- 5 Hamilton **Abilities, Woolworths**
- 6 Tauranga **Redline**
- 7 Gisborne **Walter Finlay**
- 8 Hawke's Bay **Bin Hire**
- 9 New Plymouth **Woolworths**
- 10 Whanganui **Whanganui Council**
- 11 Wellington + Wairarapa **Earthlink**
- 12 Nelson **Enviro NZ**
- 13 Marlborough **JBL**
- 14 Christchurch + Waimakariri **Kilmarnock**
- 15 Oamaru **Waitaki Resource Centre**
- 16 Queenstown, Alexandra + Wanaka **All Waste**
- 17 Dunedin **Waste Management**
- 18 Invercargill + Gore **Recycle South**

- 1 Future Post **Waiuku, Blenheim**
- 2 saveBOARD **Hamilton**



3.3 Processing capacity

The Scheme has supply agreements with two New Zealand processors Future Post in Waiuku and Blenheim, and SaveBoard in the Waikato and budgeted in 2024 to reprocess 1,000 tonnes of materials.

Tonnes processed are measured by records provided in monthly invoices by processors and verified against collector's delivery notes. In 2024 as in previous years the reprocessing total is assumed to be the same as the tonnes received on site adjusted for any system losses.

Demand is measured by tonnages requested by processors to meet their production needs.

In 2024, the Scheme collected 982 tonnes of soft plastic packaging and processed 737 tonnes. The variance is due to timing of movement of bales from collection to processing and a reduction in demand from Future Post due to the economic downturn impacting sales particularly from its main market the wine and viticulture sector.

From 2025, bales will be weighed out from collectors with scales installed at those sites which did not already have them in place and weighed at Future Post.

On an ongoing basis, the Scheme assesses processing opportunities with potential new market entrants, and monitors opportunities including pyrolysis, plastic to oil, extrusion, injection moulding, use in aggregates and waste to energy.

3.4 Industrial/commercial plastic processing

An estimated 3,447 tonnes of pre-consumer/ post-industrial soft plastic was processed into a range of products including posts, parking bumpers, construction boards, garden frames, ducting cable, courier bags and bin liners.

recycling.kiwi.nz/partners

Chart 8: Scheme Collections and Processing 2024

MONTHLY COLLECTION + PROCESSING TONNES

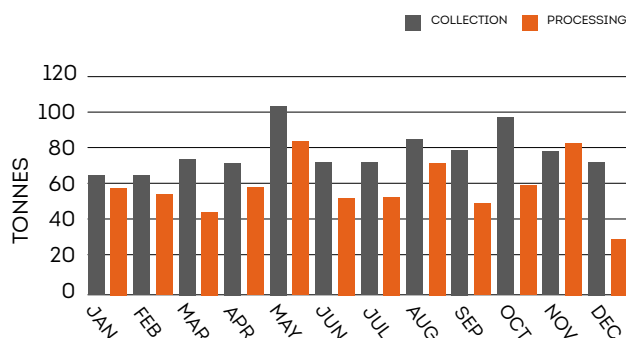
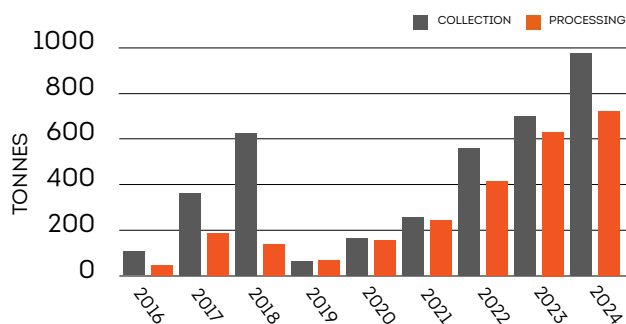


Chart 9: Scheme data capture by years since trials commenced in 2015

COLLECTIONS + PROCESSING



4 OBJECTIVES + TARGETS

The following table outlines the objectives and targets set for the Scheme reports on performance. In 2023 the Scheme has met or exceeded the key performance indicators.

OBJECTIVE	PARAMETER	2025 TARGET	2021	2022	2023	2024
Increase in tonnes of soft plastic processed in New Zealand or in near shore markets	Focus on processing of soft plastic rather than collection volumes	500 T	246 T	465 T	666 T	737 T
Increase the accessibility of the Scheme to New Zealanders	Increase number of regions offering collection facilities ¹	70%	74%	78%	85%	87%
Improve quality of collected materials	Increase education and awareness to reduce contamination	Below 8%	6.89%	4.2%	4% ²	3.9%
Increased engagement in minimising plastic consumption to close the gap between consumption and recycling	Report on tonnes of soft plastic packaging consumed	n/a	7,876 T	8,574 T	8,914 T ³	8,945 T
Stakeholder support	# members	80	155	184	201	188
	Quarterly e-news sent to stakeholders	200	250	396	446	436
	# councils promoting the Scheme	All	16	20	35	34 ⁴

1 Within 20km of work or home. Population based on Census Data 2019

2 Excluding food contaminated/wet soft plastic that is accepted by processors

3 Restated from 8,122 Tonnes to reflect increase in Other garden/non grocery products

4 Auckland, Carterton, Central Hawke's Bay, Central Otago, Christchurch, Dunedin, Far North, Gisborne, Gore, Hamilton, Hauraki, Hurunui, Hutt, Invercargill, Kapiti Coast, Marlborough, Napier, Nelson, New Plymouth, Porirua, Queenstown Lakes, Rotorua Lakes, South Wairarapa, Stratford, Tasman, Tauranga, Thames Coromandel, Waimakariri, Waikato, Waitaki, Wellington, Western Bay of Plenty, Whakatane, Whanganui, Whangarei

5 PROMOTION OF THE SCHEME

Average one mention per day

The Scheme released six news updates to support the launch of soft plastics in Invercargill, Gore and Whanganui and the kerbside collection trial in Nelson and published articles in Supermarket News, FMCG Magazine, NZ Food Technology and LG Magazine. The Scheme Manager and The Packaging Forum CEO were also interviewed on 1News, TVNZ, Newstalk ZB and Radio NZ.

isentia analytics report 1 January - 31 December 2024 Broadcast, print and internet

The Packaging Forum receives media reports and coverage daily from isentia. In the report year, there were 970 mentions of soft plastic recycling across print, broadcast and internet media, with the potential for 30.34 million opportunities to see.

Social media

The Soft Plastic Recycling Facebook page had over 20,000 views with over 12,000 followers. It operates as the Scheme's major communication channel with New Zealanders interested in soft plastic recycling. 87% of users are female and 28% of users are from Auckland.

e-Newsletters - The Wrap Up

The bi-monthly Wrap Up newsletter for Scheme members, and other stakeholders is posted on the website and shared with news media.

recycling.kiwi.nz/newsletter

Website

The Soft Plastic Recycling website provides information about collection locations, and what can be recycled through the programme and provides an important interface with consumers. It is a stand-alone soft plastics website which reflects its importance as an information source to consumers. There was a change in ownership of the website hosts which has provided different analytics. In the 2024/2025 financial year, there were 78,000 active users and 80,000 new users (111,506 in 2023) of the website and 167,663 views (232,649 in 2023; 209,400 in 2022) page views . 36% users access the website via the store locator page.

Audience

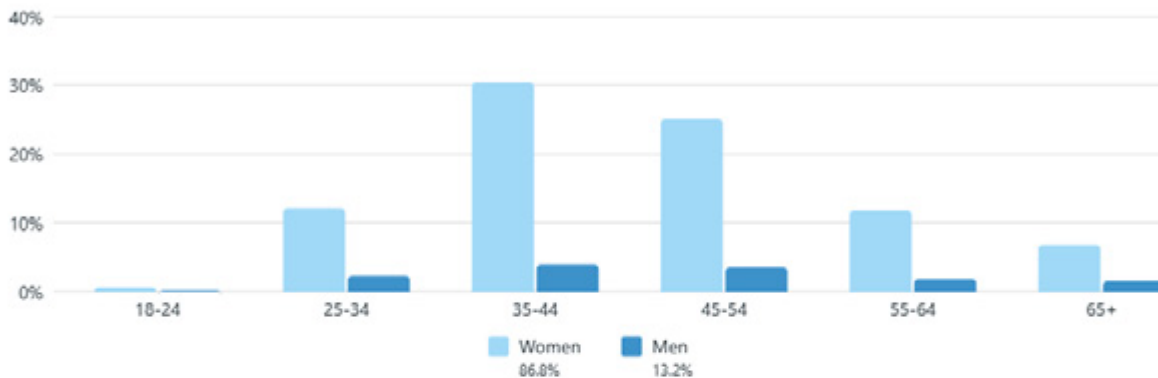
Demographics Trends Potential audience

Followers

Lifetime

12,045

Age & gender



6 FACTORS AFFECTING THE SCHEME

Global impacts

In 2024, plastic reprocessing plants across Europe continued to be under pressure with reports¹ of plant closures and reduced processing capacity due to increasing energy costs and operational expenses coupled with reduced demand for products which are competing with cheaper imports. The total capacity of European recycling facilities that shut down in 2024 doubled compared to 2023, and the situation is reported to be intensifying in 2025.

New Zealand processing capacity

The global economic headwinds are also being felt in New Zealand. The Scheme is reliant on its principal processing partner Future Post to take most of its soft plastic. Future Post in turn has been heavily reliant on the wine industry as its historic customer base and the wine industry reports flat or declining sales, tough economic conditions and falling global demand for wine. The economic challenges faced by the wine industry have reduced demand for Future Post's round posts, in turn reducing demand for the Scheme's soft plastics.

This opens opportunities for Future Post to transition into new markets for posts, rails, bollards and landscaping plastic timber for the domestic and commercial sector which the Scheme and its members are actively supporting.

The Scheme has agreements with Future Post to supply soft plastics to its plants in Waiuku and Blenheim and with saveBOARD to supply its Hamilton site.

During the year trials at Pact and Recycle South to separate out bales into polymers confirm that the post-consumer soft plastic comprises a mix of Polyethylene, Polypropylene and multi-layer polymers which cannot be efficiently separated manually. The Scheme is consulting with members on changing the material thresholds to reduce the accepted secondary materials moving towards the CEFLEX standards for flexible packaging. This in tandem with technological advances in optical sorters and advanced recycling systems would provide a pathway forward to circularity for soft plastic packaging and increase the availability of processing capacity.

Cost of living impacts

Inflation impacts the Scheme in terms of cost-of-living increases for service providers for wages, fuel and energy costs coupled with less available money from consumers and businesses including the agricultural sector for the products made from recycled plastic.

Membership challenges

In 2024, for the first time, the Scheme's membership recorded an overall loss of 13 members due to brand consolidation, producers moving out of using soft plastic and businesses seeking to reduce their costs.

As a voluntary Scheme, and without the accreditation as a voluntary stewardship Scheme under the Waste Minimisation Act (2008), the Scheme is vulnerable to loss of membership and therefore revenue.

Policy impacts

The standardisation of kerbside collections in February 2024 excluded soft plastic. The Scheme has worked with the Nelson Council to develop a trial in Nelson which complied with the Government's regulations whilst advocating for timebound and specific trials using council collection trucks and recycling facilities to be permitted.

¹ <https://plastics-recyclers-europe.prezly.com/crisis-in-eu-plastic-recycling-demands-immediate-action>

7 LOOKING FORWARD

In 2025, the Scheme celebrates a decade of soft plastic recycling in New Zealand having launched the first soft plastic collection bin in Auckland in November 2015.

End of Accreditation as a Voluntary Product stewardship Scheme

The Scheme's accreditation under the WMA 2008 as a voluntary product stewardship Scheme expired on 31 March 2025. As plastic packaging including soft plastics is a priority product, the Scheme has applied to the Ministry for the Environment for accreditation as a priority product.

Without mandatory stewardship, the Scheme is not resourced to expand and improve collection systems, pay for the increased processing costs, and introduce the compliance and reporting structures which are necessary to grow the Scheme.

The accreditation of the Farm Plastics Scheme as a priority product, which potentially includes within its scope soft plastic bags under 40kg containing

products such as seed, feed, fertiliser, soil and crop inputs, farm and animal supplements sold to the consumer via retail and not just to farms, presents a further risk to the Scheme's viability if producers are asked to join multiple Schemes.

Kerbside recycling

One of the challenges facing the Scheme is how to increase material recovery to meet increasing processing capacity and demand which will come through a mandatory plastic stewardship scheme. To understand the logistical requirements and the economic feasibility, the Scheme would like to trial collection of soft plastic at kerbside using the council collection system.

In the UK, councils will collect flexible plastic and films from kerbside by 2027 as part of the UK Government's compulsory consistent kerbside collections and the proposed National Kerbside Collections Roadmap² in Australia would also include soft plastic.

The Scheme has worked closely with FlexCollect in the UK and the trials in Australia to leverage their experience in designing a trial for New Zealand using an "orange bag" for collecting soft plastic

² <https://www.dcceew.gov.au/environment/protection/waste/publication/national-kerbside-collections-roadmap>



via a kerbside pick-up. To collect soft plastics at scale in the future will require a change to the way these materials are collected, and it is important to understand how the system could work within the existing council collection network and with any changes that would come through a mandatory Plastic Packaging Product Stewardship Scheme.

Compliance

In 2024 the Scheme commissioned Tonkin & Taylor to conduct a desk top audit of its collectors and processing partners to provide a benchmark of performance in accordance with the Scheme's guidelines, service agreements and supplier agreements. The results from this audit are being used to improve compliance, scheme resilience and put in place system changes.

Opportunities

We are proud to report from our discussions and presentations overseas that New Zealand's Soft Plastic Recycling Scheme is seen as a standout for supporting three onshore recycling solutions for post-consumer soft plastics. Mechanical recycling of soft plastic into posts or building materials may be downcycling from packaging, but the products created are replacing treated timber posts or providing sustainable building materials.

Globally the pace of implementation of advanced / chemical recycling plants has slowed with delays in Australia and Europe and reductions in processing capacity or closures. For New Zealand the best solutions currently available are mechanical recycling solutions and smaller scale modular pyrolysis plants in conjunction with optical sortation and prewash systems.

The Scheme is integrated within the Australasian Recycling Label (ARL) allowing members of the Scheme and the ARL to use the label. In 2024, a labelling audit by Sunshine Yates Consulting found that 8.8% of the 4066 units of soft plastic packaging audited were labelled with ARL and a further 16.8% have the Scheme's own "recycle at store" logo.

The Scheme has signalled to members that it will review levies during the 2025/2026 financial year to ensure it can fund expansion and the increased costs of recycling soft plastics.

The Scheme does not propose any changes to membership levies in the 24/25 financial year pending the recommendations from the Plastic Packaging Product Stewardship (PPPS) co-design project.

The Scheme's seven year accreditation period under the WMA ends in 2025 however scheme members remain committed to continuing the voluntary scheme pending the establishment of a PPPS.



want more info?
visit www.recycling.kiwi.nz/soft-plastics