SOFT PLASTIC RECYCLING SCHEME
VOLUNTARY PRODUCT STEWARDSHIP SCHEME

ACCREDITATION REPORT 01.01.25.-31.12.25

THE PACKAGING FORUM

1
SCOPE OF SCHEME

The scope of the Soft Plastics 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 does not cover pre-consumer, post-manufacturing, or back-of-house soft plastic secondary or tertiary packaging.

The Scheme funds the collection, transportation, and reprocessing of plastic materials, enabling consumers to recycle soft plastic packaging used at home, in the workplace, or in public places. Since its accreditation in March 2018, the Scheme's scope has changed to include payment of a processing fee to New Zealand reprocessors for every tonne of post-consumer soft plastic material that is recycled.

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, a trial began in Nelson to collect soft plastics from 1,000 households using a separate kerbside service. The trial continued through 2025 and is covered in this report.

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 2025 to 31 December 2025**.

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. In September 2025 a new Independent Chair Victoria Carter was appointed. 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 expert guidance to the Scheme Manager and oversees the Scheme's financial performance. The Steering Committee met nine times during the calendar year 2025 with seven steering committee meetings and two project or special meetings.

The Scheme Manager reports to the Packaging Forum's Chief Executive Craig Miller 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 August 2025. There were more nominations than positions available requiring an election.

SOFT PLASTIC RECYCLING SCHEME STEERING COMMITTEE

SARAH BAYLIS
Fonterra | producer

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

JACQUELINE NORDSVAN
Nestle NZ | producer

NICOLA VOICE
Woolworths NZ | retailer

THE PACKAGING FORUM: **TEAM STRUCTURE**

THE PACKAGING FORUM BOARD + INDEPENDENT CHAIR (Victoria Carter ONZM)

CRAIG MILLER
CEO

KASUN RANGA
GLASS PACKAGING FORUM MANAGER

GREER LARSEN
FOOD & BEVERAGE CARTONS SCHEME MANAGER
+
CAPS & LIDS SCHEME MANAGER

LYN MAYES
SOFT PLASTIC RECYCLING SCHEME MANAGER

KRISTIE PENWARDEN
COMMUNICATIONS MANAGER

DONNA HELLENS
ADMINISTRATION + FINANCE MANAGER

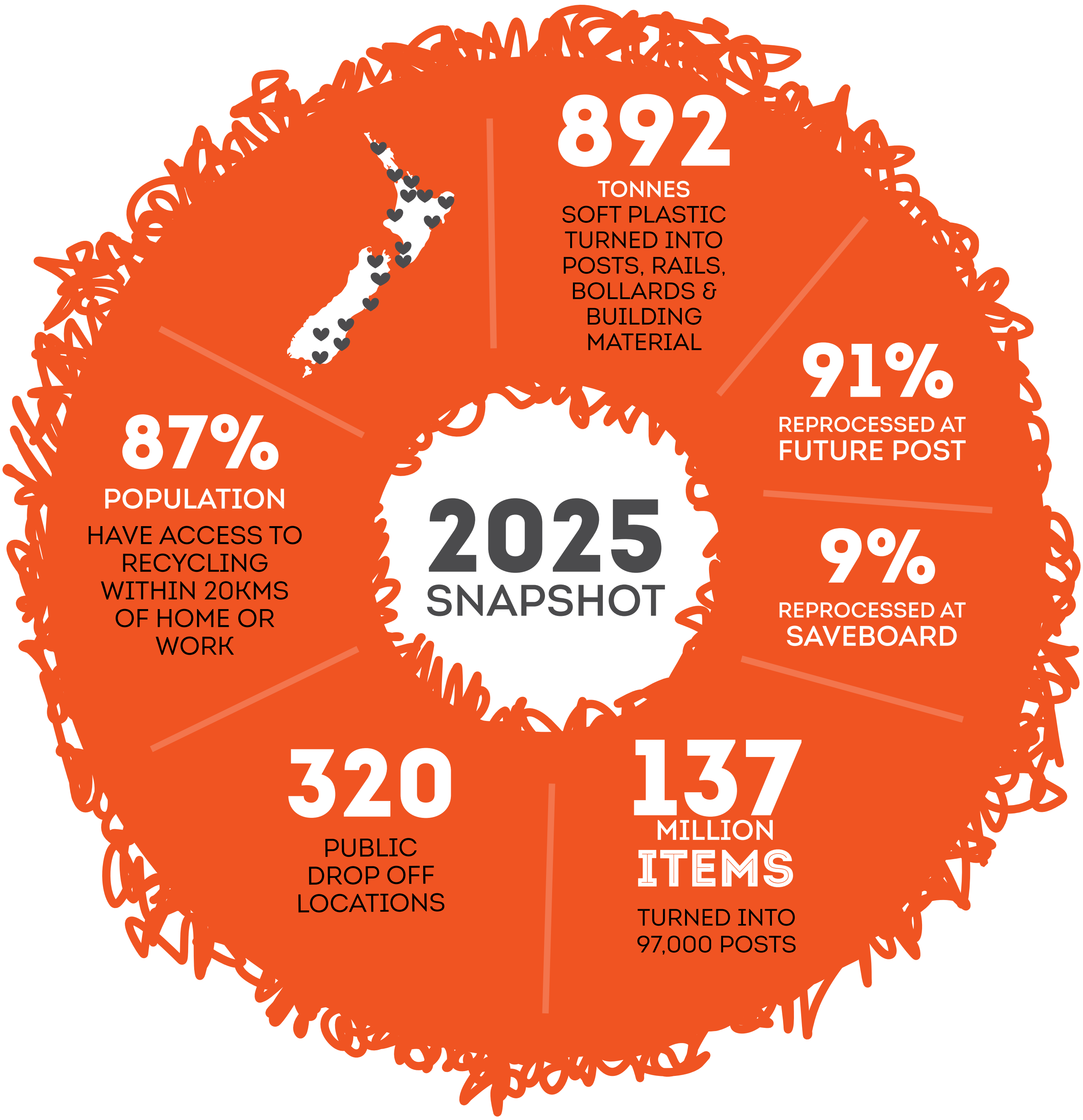
CAROLE INGLIS
ADMINISTRATION + SPECIAL PROJECTS

EXTERNAL CONTRACTS FOR IT, FINANCE, LEGAL ADDITIONAL ADMIN, DESIGN

- NOMINATED/VOLUNTARY
- EMPLOYEE
- CONTRACTOR

2
REVIEW OF THE SCHEME

The Scheme's membership represents an estimated 81% 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 or Processing Fee to cover the processing costs and to incentivise investment. Unlike the traditional model where processors pay collectors or recyclers for a commodity product, this approach is to increase the availability of onshore reprocessing of challenging materials. Overseas schemes show rising gate fees as the cost of managing waste feedstock increase.



2.1 Membership

Membership stable in 2025

As of 31 December 2025, the Scheme had 192 members – with a loss of 10 members due to brand consolidation, producers moving away from soft plastic and cost cutting offset by a gain of 13 new members.

Under an Extended Producer Responsibility (EPR) scheme, 83% of members would qualify as producers.

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 consumption using available industry market data for post-consumer soft plastic packaging which is acceptable through the scheme.

This report also estimates total soft plastic consumption, as identified through research conducted during the design process of the Plastic Packaging Product Stewardship Scheme (PPPS). The Scheme will work with members to formalise tonnage placed on the New Zealand market reporting through an online reporting portal.

Participation levels in Scheme. Based on Circana data which is supplied to the Scheme on behalf of their clients, as well as an analysis of brands introduced within these categories by our members, the Scheme covers approximately 81% of the post-consumer soft plastic packaging market for food and grocery products, as defined in the categories outlined in

Chart 1. Membership

SOFT PLASTIC SCHEME MEMBERSHIP

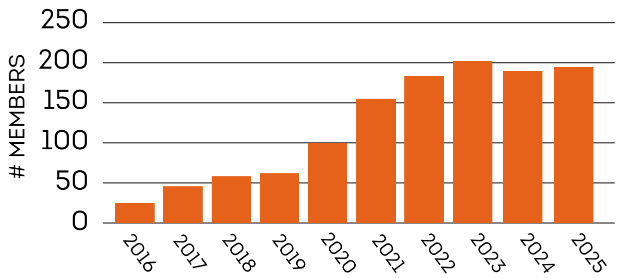
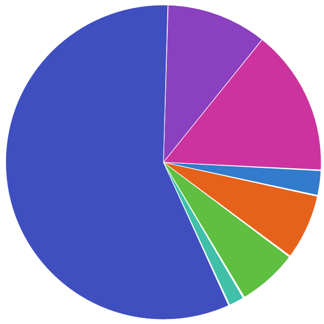


Chart 2. Members by category type

SOFT PLASTIC SCHEME MEMBER CATEGORIES 2025



FOOD BRAND **111**
DRINKS BRAND **3**
GROCERY BRAND **12**
MANUFACTURER/DISTRIBUTER **13**
FOOD RETAILER **5**
OTHER RETAILER **29**
SERVICE/TOURISM INDUSTRY **20**

Chart 3. Scheme members' estimated market share by category

CATEGORY	EST % SHARE OF TOTAL BY MEMBERS	UNIT SALES 2025
Bread bags	95%	124,588,273
Potato chips	90%	158,075,568
Biscuits	80%	99,509,964
Frozen food bags	70%	66,925,804
Confectionery	90%	161,733,987
Pasta, rice + noodles	50%	85,053,346
Breakfast cereal	90%	60,477,148
Toilet tissue	90%	36,516,841
Sanitary hygiene	85%	13,878,843
Kitchen towel	90%	14,539,799
Instant/freeze dried coffee	80%	17,483,833
Dairy (block/processed/grated)	90%	35,328,784
Fresh salad	50%	37,513,572
Bacon	70%	20,370,082
Fresh soups/meals	60%	3,831,234
Dry cat food	80%	8,654,496
Dry dog food	80%	24,138,406
Frozen poultry + meat	70%	24,420,974
Frozen seafood	70%	24,420,974
Chilled seafood	70%	10,033,320
Other courier bags/meal kits	75%	50,000,000
Total	**81%**	**1,057,400,852**

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
ASB
Ashley and Co
AsureQuality
Back Country Foods
Blue Frog Breakfast
Bluebird
BNZ
Bon Accord
Braemar Hospital
Breadcraft
Broken Heart Spirits
Bunnings
Calbee Australia
Carterton District Council
Cas-Pak Products NZ
Central Landscaping
Ceres Organics
Chantal Organics
Chobani Pty
Clorox
Coca-Cola Europacific Partners
Colgate
Cottonsoft
Dairyworks
Daltons
Dark Horse Coffee
D M Dunningham
Dole NZ
Ecostore
EIT Hawke's Bay Campus
Endeavour Consumer
Enphase Energy
Epic Coffee
Epic Dairy
Espresso Direct
Essity
Farrah's
Ferrero Australian Pty
Flight Coffee
Fonterra
Foodstuffs
Foundation Coffee
Freightways
Fresh As Herbs
FSL Foods
Furtex
Gaults
General Mills
Genius Pet Food
George Weston
Giannis Pita Bread
Goodman Fielder
Good Nature
Griffins
Hally Labels
Hanes
Happypet
Hasper Brand Labs
Harraways & Sons
Havana Coffee
Healthy Kelsi
Heartland Chips
Hubbards
Hunters Bounty
Inghams & Bostock Brothers
Integrated Packaging
Jacobs Douwe Egberts
Jenkins Freshpac
JNTL Consumer Health (NZ)
Just Lemon Marketing
Kaipara Kumera
Karajoz Coffee Company
Kathmandu
Kelloggs
Kimberly Clark
Kiwi Property
Kmart
KPL Distribution
Kraft Heinz Watties
Leaft Foods
LIC Diagnostics
Life Health Foods
Little Beauties
Living Green NZ
Lululemon
Lyttelton Port Company
McPhersons Consumer Products
Makmar
Mars NZ
Masterpet ANZ
Maxfoods Pty
Meadow Mushrooms
Mercy Hospital Dunedin
Mexicano
Midlands Apiaries
Mitchells Nutrition
Mondelez
Mother Earth
Mrs Rogers
Munro Footwear Group
My Food Bag
Natural Pet Foods Group
Nestle
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
Precinct Properties NZ
Procter & Gamble
Prodotti D' Italia
Pure Delish
Quantum Pacific
Ravensdown
Raw Essentials
RB Hygiene New Zealand
Real Pet Food Company
Real Rad Food
Reduced to Clear
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
S.Smith
Stratex Group
Sunrice
Suntory Beverage & Food
Super Retail
Swisse Wellness
SWP Commercial
T & G Global
Tasti
TCL Hunt
TC Transcontinental Packaging
Tegel
The Baron
The Lactation Station
The Warehouse
Tui Products
UCC Coffee NZ
Unilever
Uno Loco/Hula
Van Dyck Fine Foods
Venerdi
Vitaco Health (NZ)
Weaver Cacaco
Wellington Chocolate Factory
Wellington Regional Hospital
Westpac
Whittaker & Sons
Woodhaven Gardens
Woolworths
WOOP
Yates
Z Energy

Chart 3.

2.2 Stakeholder Relationships

The Scheme places significant emphasis on consumer communication, as detailed in Section 5 below. In June 2025, Horizon Research found that **64%** (2,470,000 adults) of respondents have heard that they can recycle their soft plastic bags and packaging (up from 59% in 2024). When shown an image of the soft plastic recycling bins, 62% said they had seen them, up from 60% in 2024.

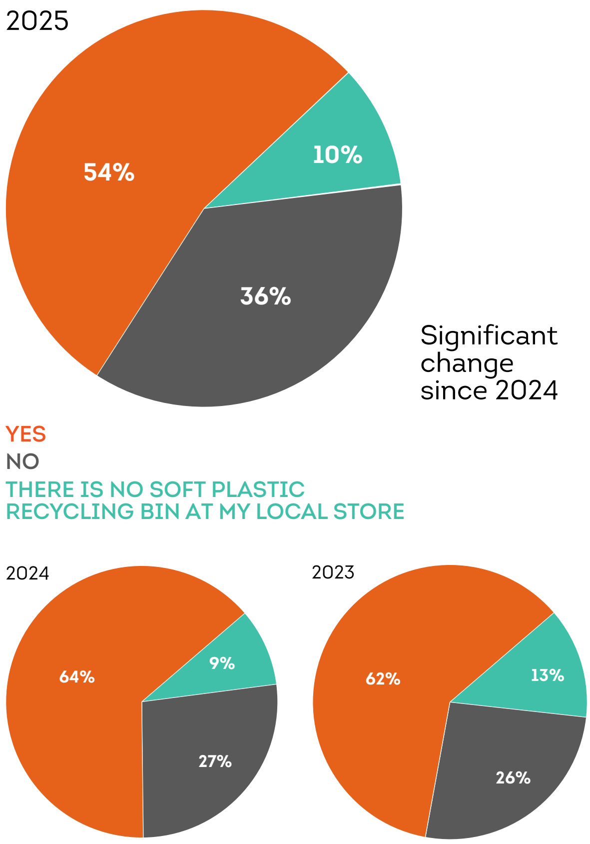
36% (1,399,000 adults) said they had recycled soft plastics at their local store up from 27% in 2024.

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

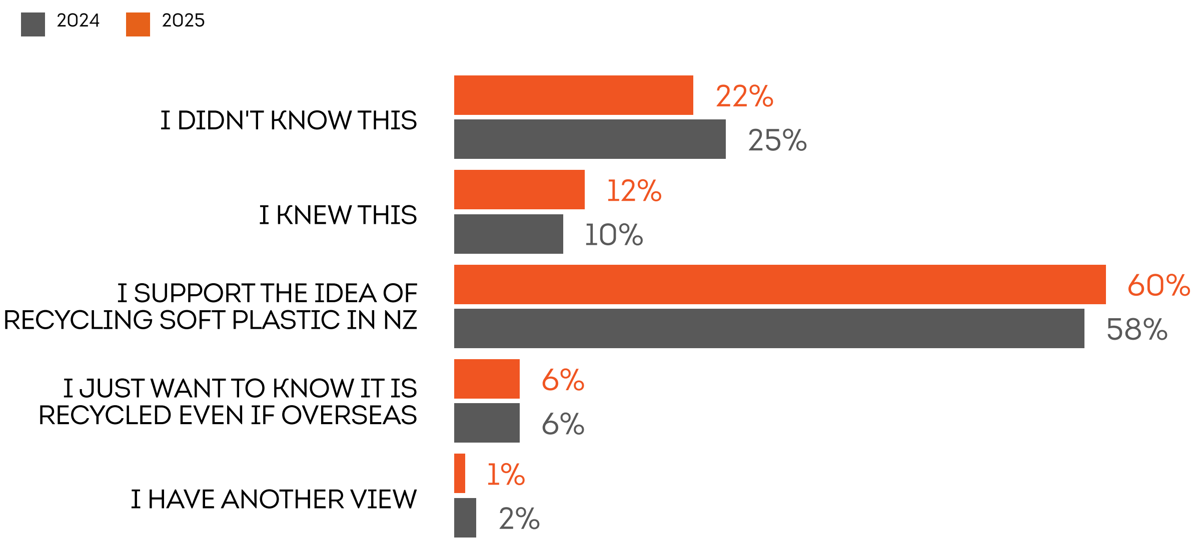
They were then asked what they thought of the Scheme.

- **60%** (2,300,000 adults) support the idea of recycling soft plastics in New Zealand. Slightly up from **58%** in 2024.
- **22%** (835,000 adults) were unaware of the Scheme. A slight drop from **25%** in 2024.
- **12%** (456,000 adults) were aware of the Scheme (**10%** in 2024).

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



THOUGHTS ON THE SOFT PLASTIC RECYCLING SCHEME



Stakeholder Relationships

The Scheme collaborates with organisations such as the NZ Food & Grocery Council (NZFGC), Retail NZ, Plastics NZ, the Australian Packaging Covenant Organisation (APCO), Soft Plastic Stewardship Australia (SPSA), WasteMINZ, and other relevant stakeholders to promote and develop initiatives for soft plastic recycling.

The Scheme Manager delivered presentations at the Bakery New Zealand Seminar Series, the AIP Sustainable Packaging Forum, and Foodtech Packtech, and represented the Scheme with an exhibition stand at the biennial Foodstuffs Expo. Additionally, the Packaging Forum CEO and Scheme Manager jointly hosted a series of EPR webinars in collaboration with SPSA to enhance awareness of international best practices.

The Packaging Forum is a member of EXPRA (Extended Producer Responsibility Alliance) which brings together 37 national packaging stewardship organisations, and Recoup UK, the UK's leading authority on plastics resource efficiency and recycling. By joining these international groups, the Scheme gains valuable opportunities to share its experiences and benefit from global insights.

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 and The Packaging Forum's LinkedIn. 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.

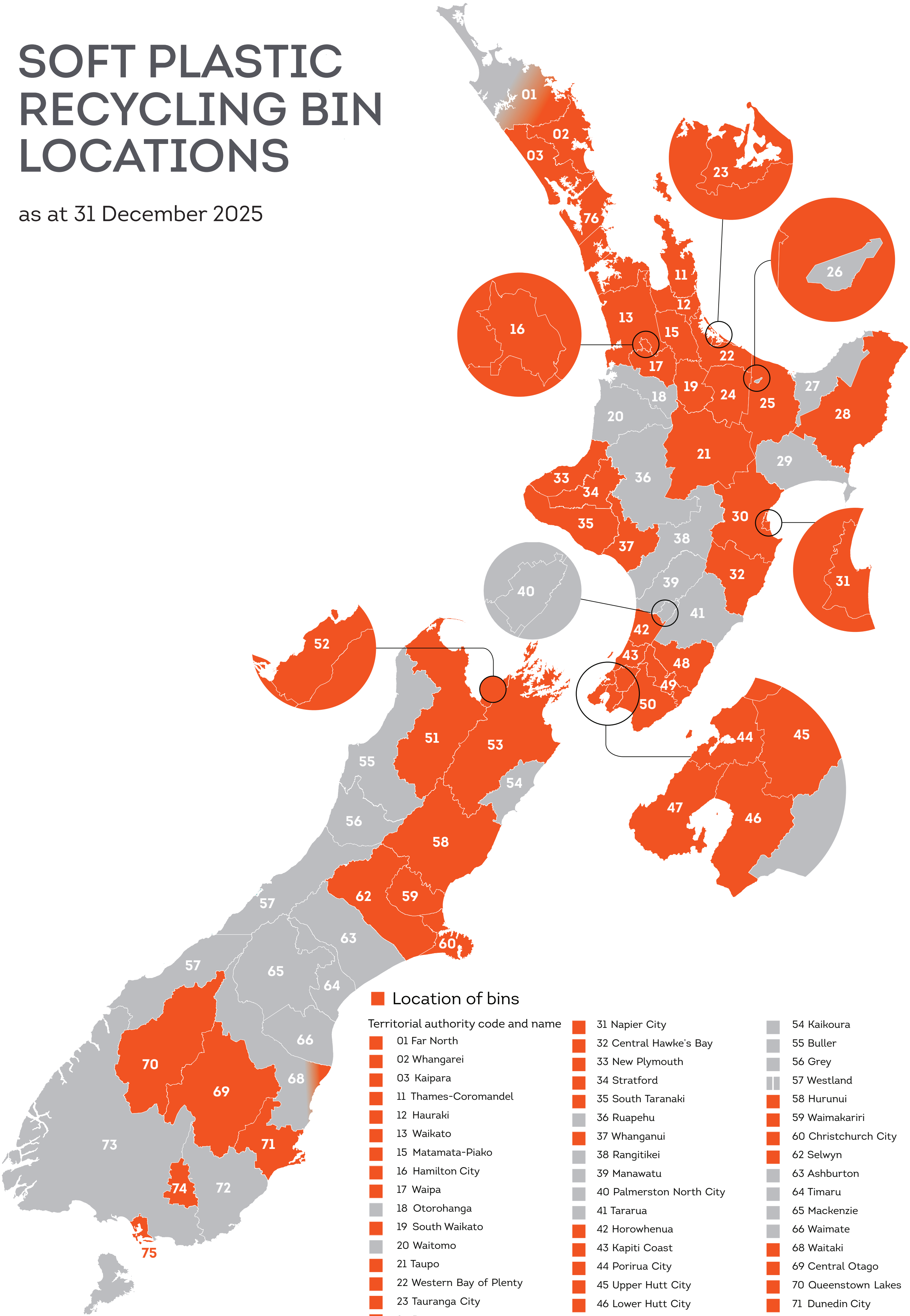
The Scheme works with councils where there is a collection service to engage the local community. The Scheme is available in 46 territorial authority regions and 78% of these councils promote the Scheme on their website or social media.

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 2025



Location of bins

Territorial authority code and name

- 01 Far North
- 02 Whangarei
- 03 Kaipara
- 11 Thames-Coromandel
- 12 Hauraki
- 13 Waikato
- 15 Matamata-Piako
- 16 Hamilton City
- 17 Waipa
- 18 Otorohanga
- 19 South Waikato
- 20 Waitomo
- 21 Taupo
- 22 Western Bay of Plenty
- 23 Tauranga City
- 24 Rotorua
- 25 Whakatane
- 26 Kawerau
- 27 Opotiki
- 28 Gisborne
- 29 Wairoa
- 30 Hastings
- 31 Napier City
- 32 Central Hawke's Bay
- 33 New Plymouth
- 34 Stratford
- 35 South Taranaki
- 36 Ruapehu
- 37 Whanganui
- 38 Rangitikei
- 39 Manawatu
- 40 Palmerston North City
- 41 Tararua
- 42 Horowhenua
- 43 Kapiti Coast
- 44 Porirua City
- 45 Upper Hutt City
- 46 Lower Hutt City
- 47 Wellington City
- 48 Masterton
- 49 Carterton
- 50 South Wairarapa
- 51 Tasman
- 52 Nelson City
- 53 Marlborough
- 54 Kaikoura
- 55 Buller
- 56 Grey
- 57 Westland
- 58 Hurunui
- 59 Waimakariri
- 60 Christchurch City
- 62 Selwyn
- 63 Ashburton
- 64 Timaru
- 65 Mackenzie
- 66 Waimate
- 68 Waitaki
- 69 Central Otago
- 70 Queenstown Lakes
- 71 Dunedin City
- 72 Clutha
- 73 Southland
- 74 Gore
- 75 Invercargill City
- 76 Auckland

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 informed 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. Survey results for 2025 are not available at the time of writing this report.

In 2024, it was 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:

- UK plastic films and flexibles represent 29% of total household plastic packaging placed in the market[1] or around 420,500 tonnes equivalent to around 6.07kg per capita[2].
- 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 changes to material thresholds are being considered by the scheme to improve the quality of feedstock.

Category sales

In line with previous report years, the unit sales of bags by type has been calculated from information supplied to the Scheme 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.

1 UK Household Plastic Collection Survey 2024 - Recoup
2 APCO Packaging Consumption & Recovery Data 2022-2023

Sunshine Yates Consulting performed an audit in June 2025, counting 8,194 items with a total weight of 57 kg. This results in an average weight of **6.9 grams** per item.

Soft plastic packaging sales and consumption

The unit sales of food and grocery items packaged in soft plastics remained steady in 2025, with 1,057,400,852 units placed on the market. This figure reflects a minimal variation of only 0.1% compared to previous data, indicating consistent consumption patterns within the sector.

The Scheme also provides estimates for unit sales and associated tonnages for non-grocery, garden, and other consumer products sold through the grocery sector. These calculations rely on audited average weights to determine total soft plastic tonnages.

Based on these estimates, approximately 9,421 tonnes of post-consumer soft plastic packaging were consumed across the specified categories in the reporting period, representing a 5% increase over 2024.

Improving data

The Scheme continues to assess how to improve the data capture of soft plastic packaging placed on the market. 17% of members are 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. Larger scheme members are used to submitting consumption data to the Australian Packaging Covenant Organisation (APCO).

The Scheme is working with Valpak (part of Reconomy Group) to develop a soft plastic database system for scheme members to submit data, which Valpak will analyse and validate. Valpak will also provide a "ready reckoner" to help members estimate their soft plastic packaging volumes and offer bespoke support services as needed.

Chart 5. Estimated volume of soft plastic bags by category

BAG TYPE	UNIT SALES 2025	AVE WEIGHT GRAMS	TOTAL TONNES 2025	2024
Bread bags	124,588,273	7.20	897	940
Potato chips	158,075,568	4.14	654	1116
Biscuits	99,509,964	3.23	321	394
Frozen food bags	66,925,804	7.49	501	624
Confectionery	161,733,987	2.08	336	344
Pasta, rice & noodles	85,053,346	5.03	428	554
Breakfast cereal	60,477,148	9.79	592	598
Toilet tissue	36,516,841	10.63	388	435
Sanitary hygiene	13,878,843	10.63	148	165
Kitchen towel	14,539,799	10.63	155	170
Instant/freeze dried coffee	17,483,833	5.53	97	87
Dairy (block/processed/grated)	35,328,784	4.22	149	213
Fresh salads	37,513,572	5.69	213	387
Bacon	20,370,082	7.84	160	228
Fresh soups/meals	3,831,234	8.25	32	37
Dry cat food	8,654,496	17.72	153	113
Dry dog food	24,138,406	17.72	77	56
Frozen poultry & meat	24,420,974	7.49	181	238
Frozen seafood	24,420,974	9.38	229	231
Chilled seafood	10,033,320	9.38	94	135
Other - courier bags/meal kits	50,000,000	19.8	989	628
Other - garden/reusable bags	100,000,000	26.27	2627	1255
Total	**1,157,400,852**		**9421**	**8945**

Acceptable plastic resins

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

The Scheme plans to transition 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 the Soft Plastic Stewardship Australia (SPSA) scheme.

The purpose of these changes is to enhance the feedstock quality for advanced or chemical recycling, as well as film-to-film reprocessors, and to encourage processors to enter the New Zealand market.

Members will be consulted about the Scheme in 2026, and any proposed changes are expected to apply to new products in 2027, with a gradual phase-out period for existing items.

Scheme Manager Lyn Mayes, Gareth Morton Flexcollect UK and Mark Penny J&B Recycling UK - visit to MRF sorting soft plastic from kerbside collections around Newcastle UK

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.

FLEXIBLE LAMINATE		SECONDARY MATERIALS %											
		PET	HDPE	PVC	PVDC	LDPE	PP/BOPP	PS	NYLON	EVOH	COMPOSTABLE PLASTIC	PAPER/LABELS	FOIL
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 types of plastics accepted are determined by current processing capabilities within New Zealand.

Two separate studies analysing the composition of scheme soft plastics determined that LDPE makes up about 56%[3] of the total. A 2024 bale audit showed the breakdown as 56% LDPE, 5% PP, and 39% multi-layer soft plastic[4] .

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 other parts of the Upper North Island, Woolworths NZ and Foodstuffs stores collect and bale soft plastic bags at their locations. These bales are then sent to Future Post in Waiuku. Throughout 2025, the programme has worked to include these collection points in its network to help reduce the operational resource at each store.

My Food Bag and WOOP also have return services for their customers, and these are baled by our collectors in the relevant locations. 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 2025 collections.

Chart 7. Collections by location and percentage share

LOCATION	COLLECTOR	% SHARE 2025	% SHARE 2024
Northland	Waste Management	1.0	1.4
Auckland/Upper NI	Redline/Retail Logistics	40.6	33
Auckland & Waikato	Abilities	6.3	10.8
Hauraki	Hauraki DC	1.1	1.1
Thames Coromandel	Waste Management	1.7	2.1
Tauranga	Redline	5.0	5.9
Gisborne	Walter Finlay	0.6	0.5
Hawke's Bay	The Bin Co	3.5	4
Whanganui	Whanganui RR	0.9	0.6
Wellington Kapiti & Masterton	Earthlink	14	15.4
Nelson/Tasman	Enviro NZ	4.6	3.43
Marlborough	JBL	1.2	1.2
Christchurch/ Canterbury	Kilmarnock	13.2	14
Oamaru	Waitaki RC	0.9	1.7
Central Otago	AllWaste	0.9	0.6
Dunedin	Waste Management	3.9	3.6
Invercargill/Gore	Recycle South	0.4	0.2
Nationwide courier bag	NZ Post	0.4	0.5

3 PACT Recycling / Nilo

4 PACT Recycling

Local collections to **local processors**

1 Northland Waste Management
2 Auckland Abilities, Redline, Foodstuffs, Woolworths
3 Thames Coromandel Waste Management
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 Kerbside collection trial - Nelson City

The trial began in Nelson City in October 2024, with 1,000 households choosing to participate in the collection service funded by the Scheme. In 2025, these households put out a total of 11,487 orange bags, averaging about one bag per household each month. This amounted to 6,768 kilograms–or over one million bags and wrappers–which were recycled into around 690 Future Post posts in Blenheim. During the same period, stores across the wider Nelson Tasman region collected 28 tonnes of soft plastics, with drop-off rates increasing since the kerbside trial started.

3.4 Scheme processing partners and operations

The Scheme supplies two processors in New Zealand: Future Post, which operates facilities in Waiuku and Blenheim, and saveBOARD, located in the Waikato region. For 2025, the Scheme budgeted to recycle 1,000 tonnes of soft plastic. However, actual processing capacity was lower than anticipated. Future Post accounted for 91% of the Scheme's plastic recycling. During 2025, economic conditions continued to influence sales, particularly within the wine and viticulture sector, while transitioning to new markets–including commercial and household landscaping, bumper stops, and bollards–took longer than anticipated.

The introduction of new products led to operational downtime at both Future Post sites to allow for commissioning of new equipment, and production was further affected by an arson incident at the Waiuku facility in November 2025. Collectively, these factors impacted the Scheme's overall processing volumes for the year.

Tonnes delivered to reprocessors are tracked using monthly gate fee invoices and checked against collectors' delivery notes. The Scheme reports on tonnes collected, received, recycled i.e. reprocessed, along with any system losses.

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

In 2025, the Scheme collected **1,086 tonnes** (an increase of 104 tonnes) of soft plastic packaging, despatched **990 tonnes** of soft plastic bales to be reprocessed with **892 tonnes** recycled within the 12-month period.

The variance mainly stems from a 245-tonne carryover from 2024. The Scheme has kept store drop-off numbers steady in 2025 and has not expanded to any new geographic regions.

Additionally, 26 tonnes of soft plastic were landfilled due to fire damage at Future Post.

To mitigate risk, the Scheme is investigating alternative destinations to improve the circularity of soft plastic and to address plastic which is either contaminated or not suitable for reprocessing.

In December 2025, 16 tonnes of soft plastic was containerised for export to IQ Renew in New South Wales, Australia. IQ Renew operates the first purpose built post-consumer soft plastics processing plant in Australia which washes, optical sorts and grades soft plastics into three feedstock grades for mechanical and advanced recycling. The export trial is intended as a technical and commercial validation step.

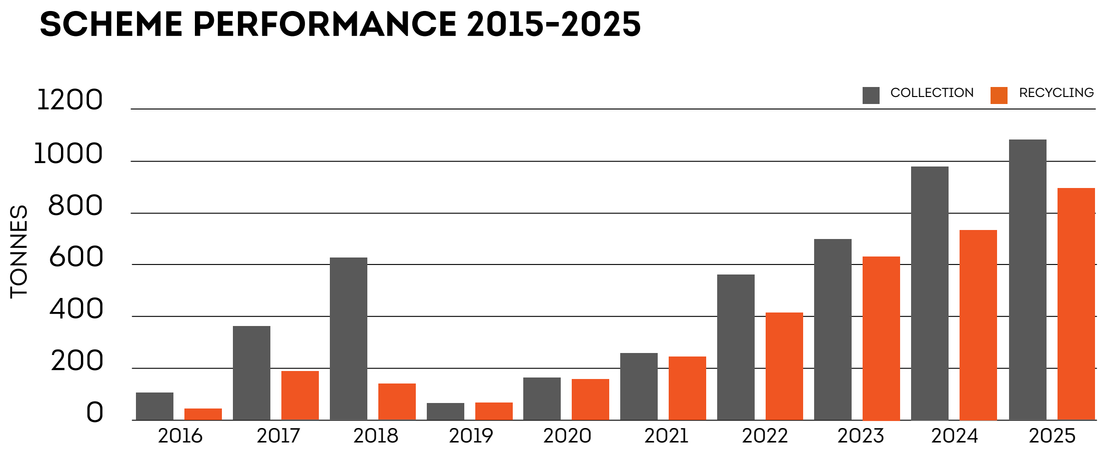
In December, 38 tonnes of baled soft plastics were delivered to Enviro NZ's Process Engineered Fuel (PEF) facility in Pokeno. Enviro NZ has established a processing plant, which diverts hard-to-recycle plastics from landfill and converts them into PEF used to fuel Golden Bay's cement kiln as an alternative to imported coal. This trial will inform the development of a Life Cycle Assessment (LCA) that directly compares the environmental impact of the PEF process with traditional landfill disposal. Plastic which is delivered for PEF will be reported separately from recycling metrics.

recycling.kiwi.nz/partners

Chart 8: Summary of Collection, Delivered (Gate Fee), Recycled and other outcome

COLLECTED	GATE FEE DELIVERED TO END MARKET	RECYCLED INTO NEW PRODUCTS SHARE 2025	LOST IN SYSTEM - LANDFILL	WTE: PROCESSED ENGINEERED FUEL
1086 Tonnes	990 Tonnes	892 Tonnes	26 Tonnes	38

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



Craig Miller, CEO The Packaging Forum and Paul Charteris, Founder & CEO saveBOARD

4
OBJECTIVES + TARGETS

The following table outlines the objectives and targets set for the Scheme reports on performance. In 2025 the Scheme has met or exceeded the key performance indicators.

OBJECTIVE	PARAMETER	2025 TARGET	2021	2022	2023	2024	2025
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	892T
Increase the accessibility of the Scheme to New Zealanders	Increase number of regions offering collection facilities[1]	70%	74%	78%	85%	87%	87%
Improve quality of collected materials	Increase education and awareness to reduce contamination	Below 8%	6.89%	4.2%	4%[2]	3.9%	3.8%
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	9,421 T
Stakeholder support	# members	80	155	184	201	188	193
	Quarterly e-news sent to stakeholders	200	250	396	446	436	429
	# councils promoting the Scheme	All	16	20	35	34	36[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, Kāpiti Coast, Marlborough, Napier, Nelson, New Plymouth, Palmerston North, Porirua, Queenstown Lakes, Rotorua Lakes, South Wairarapa, Stratford, Tasman, Tauranga, Thames Coromandel, Waimakariri, Waikato, Waitaki, Wellington, Western Bay of Plenty, Whakatane, Whanganui, Whangārei

5
PROMOTION OF THE SCHEME

Isentia analytics report 1 January - 31 December 2025 Broadcast, print and internet

The Packaging Forum receives media coverage on a daily basis from isentia. In the report year, there were 90 news items soft plastic recycling across print (42%), broadcast (19%) and online (39%) media,

This coverage reached a cumulative potential reach of 1,134,785 and an Advertising Sales Rate (ASR) of NZD 514,760.

The media type with the highest volume was Online with 35 mentions

The media type with the highest potential reach was Newspaper with a total Potential Reach of 537,684

The top 10 media outlets resulted in 52% of the mentions.

Social media

The Soft Plastic Recycling Scheme Facebook page had over 23,000 views with 12,000 followers. It operates as the Scheme's major communication channel with New Zealanders interested in soft plastic recycling. 63% of users are aged between 35 and 54 and 43% of users are from Auckland.

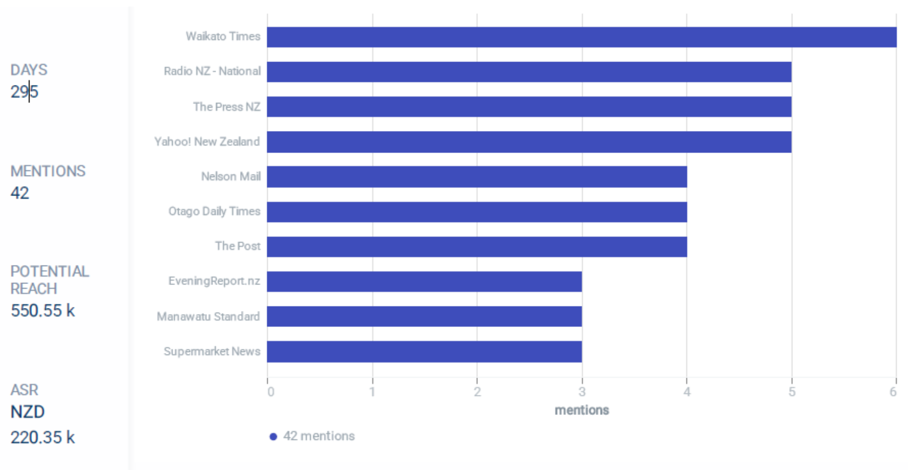
e-Newsletters – The Wrap Up

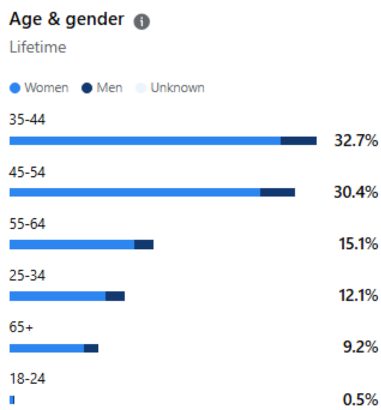
The bi-monthly Wrap Up newsletter for Scheme members, and other stakeholders is posted on the website and shared with news media.

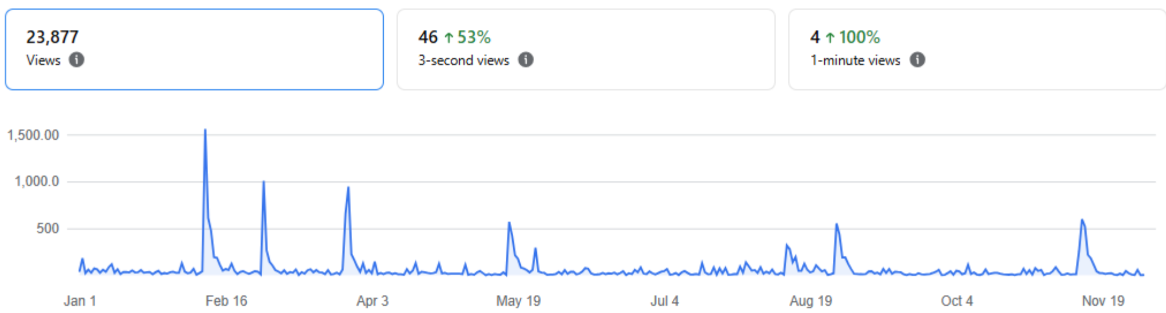
recycling.kiwi.nz/newsletter

Website

The Soft Plastic Recycling website provides 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 providing an information source to consumers. In 2025 there were 114,000 visits to the website with 39% accessing via the store locator page.







6
FACTORS AFFECTING THE SCHEME

Global context

Europe's plastic recycling sector experienced continued disruption in 2025 due to increased imports of low cost material, reduced demand for recycled content, and widespread facility closures. Since 2023, nearly one million tonnes of recycling capacity have been lost, with closure rates tripling in 2025. The Netherlands, Germany, and the United Kingdom were among the most affected regions.

Domestic processing

New Zealand continues to face constraints in onshore processing capacity for post consumer soft plastics. Future Post and saveBOARD are developing new products and market channels; however, commissioning new equipment and establishing sustained demand have slowed the Scheme's ability to expand collection and processing volumes.

The Scheme is also working with prospective entrants, including Plastoil and Nilo, which anticipate operational capability from early 2027. These timelines highlight the long lead time required to establish new processing infrastructure in New Zealand.

In addition, the Scheme would like to conduct export technical validation trials with IQ Renew in Australia to assess the potential for Trans-Tasman optical sorting and grading, pending confirmation of import requirements.

Alternative end of life pathways

Enviro NZ's Pōkeno facility offers an alternative pathway for materials that are difficult to recycle or fall outside current specifications, converting them into Process Engineered Fuel (PEF) for use in Golden Bay's cement kilns. Plastics processed via this route will be separately reported and excluded from recycling performance metrics. The PEF option provides contingency capacity for contaminated materials and supports improved management of non recyclable soft plastics.

Rising operational costs

Operational expenses increased significantly in 2025 and are expected to rise further in 2026. Cost pressures are driven by higher wages, fuel and energy costs, and increased gate fees for processing soft plastics. These factors will continue to affect the scheme's operating environment. To help mitigate these costs, membership levies are being increased for the 2026/27 financial year and the scheme proposes to introduce fees based on tonnes of soft plastic placed on the New Zealand market from 1 April 2027.

Membership

There was a modest net gain of three members, however, maintaining and strengthening participation remains a priority. Membership contributions and revenue from collection partners are essential to sustaining the viability of the voluntary scheme and its service delivery.

Future Post bollards.
Buy Recycled in action.

7
LOOKING FORWARD

Transition to mandatory product stewardship

The Scheme has submitted an application for priority product accreditation and will maintain its status as a voluntary scheme throughout the process. In September 2025, the Steering Committee reaffirmed its commitment to advancing the priority product application and the Board has approved a revised priority product application as the PRO for a soft plastic stewardship scheme.

As part of its strategic review, the Scheme will transition from a membership fee-based model to a producer-pays structure, with contributions determined by tonnage placed on the New Zealand market effective from 1 April 2027. Valpak is currently developing a reporting framework for soft plastics, which will be introduced in 2026 to facilitate members' disclosure of soft plastic consumption and to enhance understanding of future Extended Producer Responsibility (EPR) costs and eco-modulation impacts.

Mandatory stewardship is considered essential to ensure equitable producer participation, address free rider risk and enable the scale and investment required for long term system effectiveness. Mandatory EPR is a prerequisite to expand and improve collection systems and establish the necessary compliance and reporting infrastructure to support Scheme growth.

Members expressed support for the exclusion of plastic-bagged soil conditioners, fertilisers, seeds, feed under 16kg, and all domestic pet food products from the National Rural Recycling Scheme for Farm Plastics.

Nelson Kerbside Recycling Trial

Nelson City Council will co-fund the kerbside soft plastics recycling trial until 30 June 2027, supporting its possible integration into regular collections. The 1,000-household trial runs until July 2027, with funding shared by the Council and Soft Plastic Recycling Scheme from 1 April 2026.

From a scheme perspective this and future kerbside trials are important to inform potential integration of soft plastics in council collections.

Opportunities

International discussions continue to acknowledge New Zealand's scheme as a leader in voluntary stewardship, supporting three onshore recycling methods for post-consumer soft plastics:

- Mechanical recycling (posts, rails, building materials) offers an alternative to treated timber and promotes local circular economy goals.
- Due to global delays in advanced/chemical recycling facilities, especially in Australia and Europe, New Zealand's practical options are mechanical recycling, modular pyrolysis plants, and optical sortation with pre-wash systems.
- Integration with the Australasian Recycling Label (ARL) ensures consistent labelling for Scheme and ARL members.
- The Scheme works closely with Soft Plastic Stewardship Australia (SPSA) to develop best practices in collection, sorting, and processing across the Tasman.

Strategic Plan

The Scheme has agreed its strategic plan consistent with the Packaging Forum's vision to lead New Zealand to a circular packaging future.

The strategic priorities for the Scheme are:

1. Deliver operational excellence in product stewardship
2. Advocate for the implementation of EPR commencing with transitioning the scheme from voluntary to mandatory
3. Collaboration, Education and Communication.

THE PACKAGING FORUM

SOFT PLASTIC RECYCLING

STRATEGY WHARE

PURPOSE/VISION

Leading New Zealand to a circular packaging future

STRATEGIC PRIORITIES

OPERATIONAL EXCELLENCE IN PRODUCT STEWARDSHIP

Unlocking scheme operational efficiency improvements and reducing costs

Building valuable date for members and the industry (Valpak EPR futureproofing data modelling, audits, RPS modelling)

Solutions connecting: trialling and commercialising for SPRS the diverse processing markets (IQ Renew, APR, Nilo, Plastoil, SPSA co-lab) to enable diverse domestic and offshore processing

Delivering labelling advices expertise to existing and potential new members

Expansion into new regions (Manawatū)

ADVOCACY

EPR/PPPS advocacy - submit soft plastic priority product application

Create **phased roadmap** from voluntary to mandatory to transition once legislation allows

Prepare for **new payment model** in readiness for 2027/8 implementation, leverage for EPR

Kerbside collection trials - moving into commingled council collection, supporting work of RLD - objective to include in kerbside

Support members transition towards new materials thresholds (Ceflex)

Incentivise use of recycled content to drive demand

COLLABORATION, EDUCATION, COMMUNICATION

Improving **membership engagement** and retention

Targeted new **membership drive**

Driving **buy recycled** comms to increase soft plastics demand (Bunnings trial, Future Post donations and PR/comms)

Increasing **consumer engagement** and participation via new collection trials and other positive PR opportunities

Promote scheme nationally and internationally via webinars and conferences - alignment with broader plastics and international benchmarks

ORGANISATION FOUNDATIONS

Future fit governance – independent, transparent, representative, skilled

Resourcing and structure – building capacity, adaptability and capability to deliver

Values and culture – collaborative stewardship with integrity and agility

THE PACKAGING FORUM

SOFT PLASTIC RECYCLING SCHEME

4 YEAR HORIZON AMBITIONS

POSITIVE IMPACT ON ENVIRONMENT

MEMBER VALUE

HORIZON 1

Ambition

Improve operational efficiencies; retain members; submit priority product application

Dependencies

Trials: Manco & Good Wrap Recycling

Manage fee increases

Milestone

Financials on track

HORIZON 2

Ambition

Build processing capacity

Introduce reporting portal

Maintain tonnages to budget and capacity

Dependencies

Complete trial with IQ Renew

LCA for PEF v landfill

Valpak portal in place

Milestone

IQ Renew graded analysis of soft plastic

members signed up to report portal

Submit priority product application to be the PRO for soft plastics

HORIZON 3

Ambition

Legislative design for soft plastic as a priority product

Implement tonnes placed on market fee model

Commence supply to Plastoil/Nilo

Increase members

Dependencies

Transition to producer placed on market fees

Increase revenue to meet operational costs & gate fees

Milestone

New supply agreements in place

New fee structure in place for 27/28

>200 members

PF appointed PRO for soft plastic

HORIZON 4

Ambition

Expand trial of kerbside soft plastic

Expand collections to meet new processing capacity

Dependencies

Work with government officials on design and consultation process

Kerbside trial in commingled bin via council MRF

Processing capacity – new facilities

Milestone

Kerbside collection trial in place

New material thresholds for soft plastic in place

HORIZON 5

Ambition

Implementation of mandatory stewardship

Dependencies

Legislation in place for mandatory stewardship

Expansion of membership paying based on tonnes placed on market

Expand collections as processing capacity increases

Milestone

Regulatory framework in place

TIME

Q1 FY 2026/27	Q2-3 FY 2026/27	FY 2027/28	FY 2028/29	FY 2029/30

Foundational constant: **Sector advocacy, member comms, external visibility**

Ultimate goal: **Achieve priority product status for soft plastic**