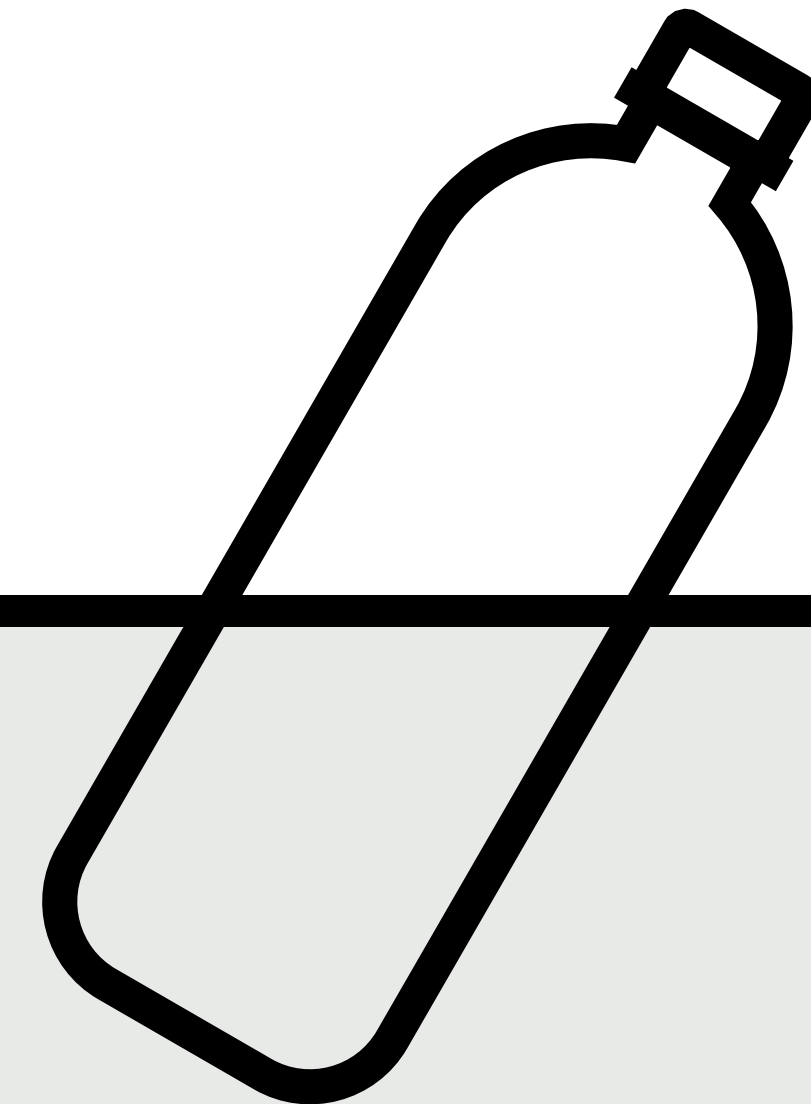


**Recycled Plastics**

# Message in a bottle

Empowering you to shape a circular economy



# See the **whole** picture

**Legislation, industry initiatives and consumer awareness has led to a focus on plastic waste, and recycling as a key solution to the problem.**

Early 2020 saw COVID shut downs and an increase in single-use plastics during the pandemic did not translate into higher PET recycling. Supply has also been hampered by global social distancing and a reduction in PET water bottle demand through a lack of tourism and large-scale gatherings.

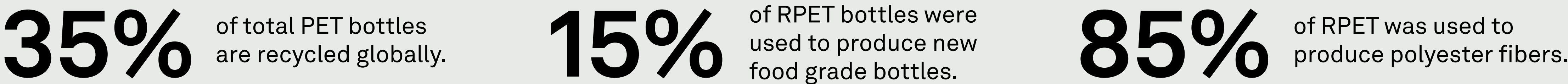
Material recovery facilities (MRFs) are still struggling to increase volumes of post-consumer waste plastics for mechanical recycling. Demand for bales of high quality, crushed containers exceeds supply and bale prices have increased accordingly. This is expected to remain the case for the next few years as the industry battles to improve collection and recycling infrastructure in the face of ever-growing demand.

Consumers' true commitment to sustainability is being tested in the face of prevailing economics. **But what does this all mean for your business?**

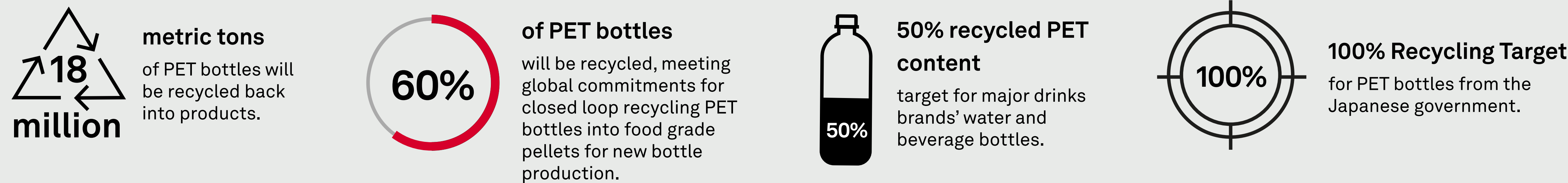


# Today...

PET bottles are the highest volume plastic recycled. Platts Analytics estimates that

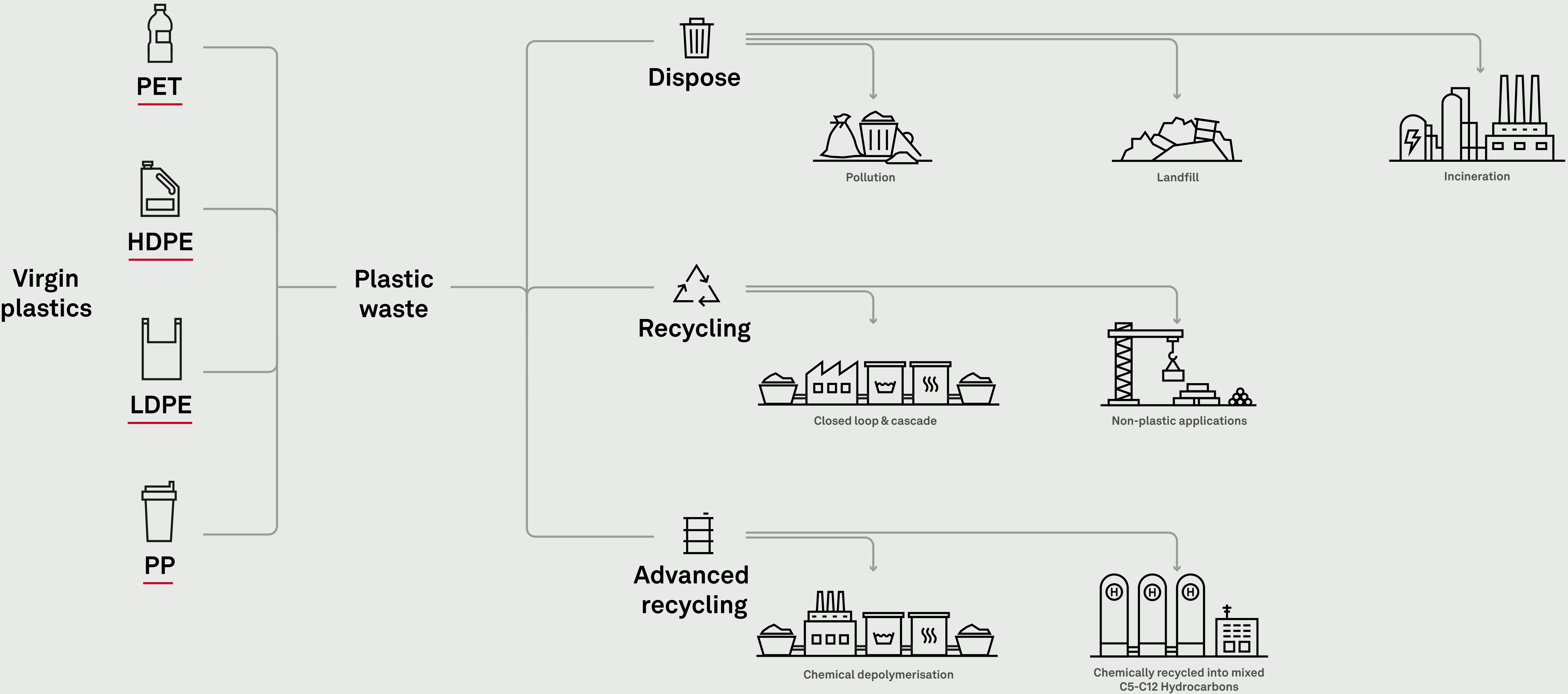


# By 2030...

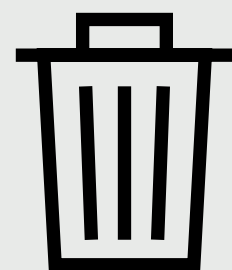


# The plastics waste **journey**

Click on the headings to find out more about each of the plastics.



# The plastics waste **journey**



## Dispose

### Pollution

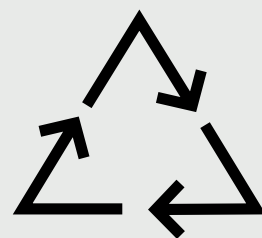
Pollution kills marine life and can prevent storm drains from working causing severe flooding. There is no impact on virgin polymer or oil demand, there is an urgent need to change consumer behavior and eliminate pollution.

### Landfill

Plastic bottles and packaging are used one time, thrown away and then sit in a landfill for decades. No impact on either virgin polymer or oil demand.

### Incineration for Power Generation

Energy recovery from burning the waste plastics to generate electricity. However, there are air emissions to consider. There is no impact on either virgin polymer or oil demand.



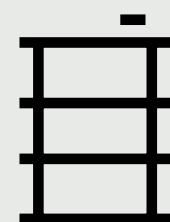
## Recycling

### Recycled (closed loop & cascade)

Current method to manage plastic waste; collect, sort, grind, wash, dry and generate flakes and pellets to use again. Reduces the demand for virgin polymer, the need to build new plants and will also reduce oil demand.

### Recycled into non-plastics applications

Such as lumber, railroad ties, construction materials, roads, etc. The recycled plastic displaces other commodities like wood and asphalt. Minimal impact on virgin polymer demand but will affect demand for other commodities.



## Advanced recycling

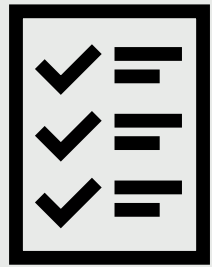
### Chemical Depolymerisation

Single-stream plastic waste is chemically recycled into monomers to make new polymers again. This process requires plastic waste of the same polymer type and allows plastic to be continuously recycled into like for like products without concerns about downgrading material.

### Chemically recycled into Mixed C5-C12 Hydrocarbons

Another longer-term technology to breakdown mixed plastics waste streams into C5-C12 hydrocarbons. These can be used to create new polymers and as transportation fuels.

# What's driving **change** in the industry?

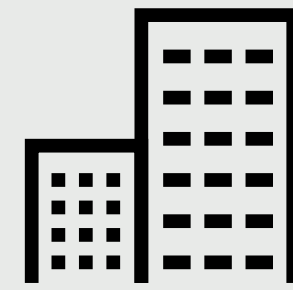


## Regulations

New government plastics regulations and recycling targets, such as increasing bans on single use plastics, are changing the way businesses approach the market.

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The UK has announced a plastic packaging tax whereby all plastic packaging must contain 30% recycled content, or be subject to a £200/nt tax commencing in April 2022.



## Company ESG policies

Media spotlight is driving a consumer push for sustainability, and fuelling the adoption of ambitious recycling content targets in companies around the world.

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Major foodservice brands targeting 30% use of recycled content by 2025.



## Global waste plastics trade

An increasing number of countries have bans on importing containers of mixed plastic waste, meaning the waste plastics will have to be managed and recycled in the country of origin.

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The PET industry body in Europe has set itself a target to recycle 100% of collected PET packaging material by 2030.



# The plastics **lifecycle**



## A **clearer** view of the circular economy

There's no recycled plastics without virgin material, so as these two markets become increasingly interconnected, seeing the complete picture across the whole value chain is fundamental to finding the opportunities.

To help you make decisions with confidence you need recycled plastics price assessments which are published alongside virgin polymer price assessments.

# Global coverage from a **global** leader



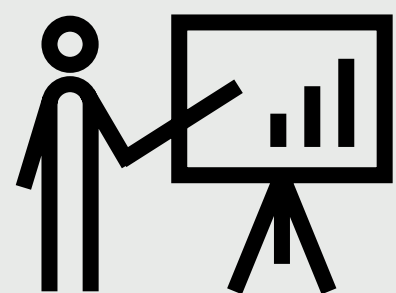
## **Powerful data and insight**

Our powerful combination of data and insight gives you a fully connected view across all recycled plastics and the global commodities markets.



## **Market transparency**

With global coverage and the most comprehensive daily price assessments for R-PET, R-HDPE, R-LDPE and R-PP, we bring transparency and clarity to both established and nascent markets, enabling you to clearly see unseen opportunities.



## **Market-leading methodologies**

Adhering to strict guidelines, our global team of editors and analysts are price neutral, editorially independent, and fully transparent, offering an unbiased view of European, North American, and SE Asian markets.



Wherever you sit in the value chain, from household waste to brand and retail, you need an informed perspective to help you unlock more opportunities in the circular economy.

At S&P Global Commodity Insights, we help you see the whole picture by providing essential insight and pricing across global markets – all in one place. Meaning you can shape what's possible in recycled plastics and do more for people, profit and the planet.

**Get in touch with one of our experts**

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