ECOSURETY

Making informed packaging decisions: Trends, data and market insights

September 2026

Intro to Lisa & Christian

Head of Client Partnerships -
Lisa

- Leads partnerships across over 130 food and drink organisations
- Provides strategic oversight and governance
- Ensures consistent, high-quality support for Ecosurety members

Senior Partnerships Manager -
Christian

- Leads relationships with major organisations across the food and drink sector
- Connects delivery with clients' sustainability and compliance ambitions
- Helps shape strategic decisions and future growth

Our purpose is to rid the world of unnecessary packaging

Our vision is a world where every brand has the **data and market insights to make smart, sustainable packaging decisions.**

Our mission is to enable the world's leading brands to make smart and sustainable packaging decisions **through our intelligence platform and deep regulatory expertise.**

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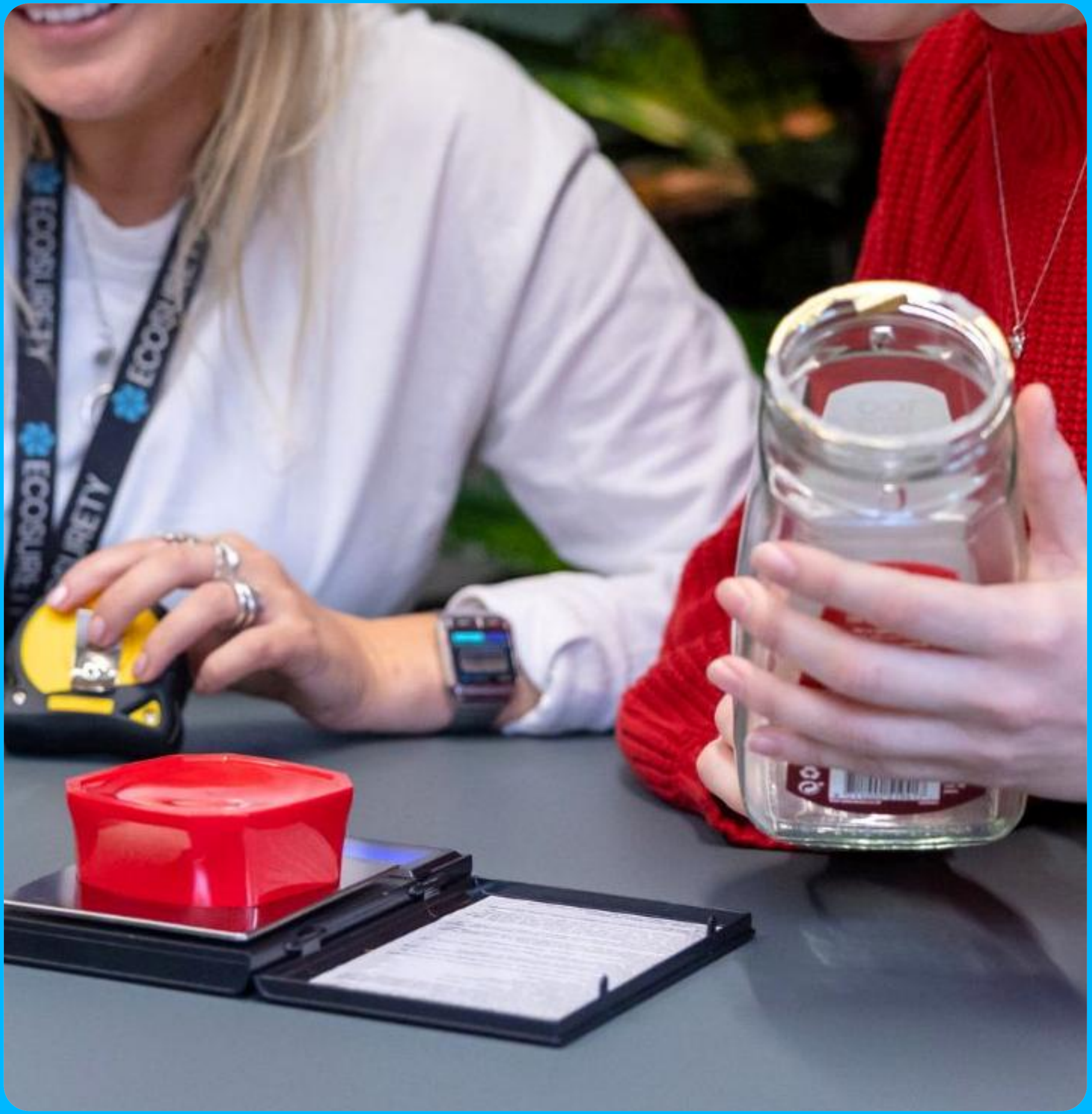
Carbon Literate Organisation
Gold

ISO
9001 14001
27001 45001

Trusted by over 500 major brands and retailers



The next chapter in packaging compliance

Deposit Return Scheme

Legislation implementation

2018
Deposit Return Scheme (DRS) first proposed under UK's Resources and Waste Strategy

2018 – 2023
Several consultations released on DRS, jointly and individually by nation

2025

- DRS legislation implemented for England and Northern Ireland.
- Scottish legislation amended to align, and Exchange for Change appointed as scheme administrator
- Consultation released on Welsh DRS

2027
DRS set to go live on 1st October

Key updates

July 2026
Material processing and RVM collection contracts agreed

June 2026
Exchange For Change Announces Deposit Return Scheme Return Handling Fee - Manual return points – 3p per container

July-October 2026
Manual collection tender goes live

September 2026
Producer fees per container confirmed all eligible drinks containers will be set at **0p for the first 15 months of the scheme**, covering October 2027 to December 2028.

Q4 2026
Producer and retailer early registration opens

October 2031
Wales begin inclusion of Glass within their scheme with Glass deposits entering from October 2031

RAM Roadmap (2026 – 2030) – Topic Reviews

RAM 2027 published (July 2026)

RAM 2028 to be published (July 2027)

RAM 2029 to be published (July 2028)

RAM 2030 to be published (July 2029)

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	2026	2027	2028	2029
Review topics	Language clarity and definitions	Rigid plastics	Collection & reprocessing	Aluminium and steel packaging
	RAM V1.0 removals	Take-back scheme guidance	'Other' packaging	Bioplastics and compostables
	Fibre-based composites	Printing inks specs and security tags	Glass packaging	Wood packaging
	Alignment with SoW regs & international assessments and protocols	Food & cosmetics contamination	Paper and board packaging	
	Flexible plastics (before Simpler Recycling rollout)			

Topics will be reviewed and considered by the Technical Advisory Committee (TAC)

RAM 2027: what changes from 1 January 2027

The big shift: more routes to red
Testing caveats are removed, several amber triggers move to red, and new compliance thresholds apply.

ACTION: review specifications before 2027 products are placed on the market.

New automatic red triggers

Food-contact non-compliance, restricted or phased-out formats, and broader substances-of-concern wording.

Tighter PFAS thresholds

>1 ppm total PFAS for any material, or >25 ppb individual or total PFAS in food packaging.

Evidence still matters

Unassessed packaging, or insufficient detail to assess household packaging, remains automatically red.

RAM 2027: material impacts at a glance

Flexible plastic	Red by default; amber only where take-back protocol requirements are met.
Paper & fibre composites	New red triggers include heated-food formats, PVDC/PVC coatings and ≥6 µm aluminium foil lamination.
Rigid plastics	Tighter rules on EVOH, colour/NIR detection, printing, labels, adhesives, foil and incompatible components.
Metal & glass	Metal test simplified around common collection; glass amber now depends on collection or take-back.
Wood & “other”	No significant change; automatically red due to current UK infrastructure.

Producer priority Map every 2027 SKU to the correct material category, then re-check specifications against the full methodology.

Key PPWR timeline for economic operators

Measure	2026	2027	2028	2029	2030	2035	2038	2040
Recycled Content					Recycled Content Requirements enforced			Increased Recycled Content enforced
Reduce/ Remove	PFAS banned over defined levels	Maximum Oversized packaging set			Maximum Oversized restrictions come into effect			
Recyclability Assessment			Design for Recycling guidance will be shared		Recycling Grades A,B,C only allowed on market	Recycled at Scale Scores launched	Recycling Grades A,B only allowed on market	
Reuse		Reuse Guidelines Published	Method to Calculate Published		Reuse Targets for Packaging Effective			Increased Reuse Targets to be Effective
Reporting	Material Composition reporting/PRO Set	Member States set registers		First member state Reporting Year				
Labelling	Harmonised labelling released	Green Dot to be merged into QR for Recycling info	Harmonised Recycling Labelling/QR mandatory					
Formats	Restrictions/minimum requirements on specific material/format use in member states							

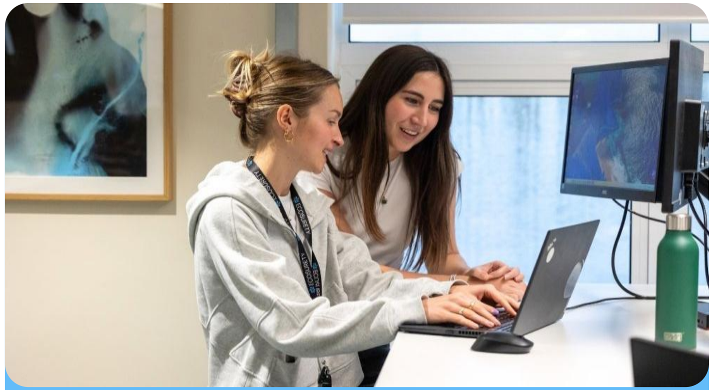
Guidance | Deadline

Top packaging trends we are seeing in 2026

1. Recyclability becoming a financial consideration

EPR and RAM are driving redesign activity

Packaging teams are increasingly assessing recyclability before launch



Packaging design and compliance are becoming integrated rather than separate functions

Identified £500k+ annual savings through packaging optimisation and recyclability improvements

We assessed 8 packaging formats with high compliance costs and poor recyclability outcomes against current and future recyclability criteria and benchmarking against best practice from competitors.

Areas of improvement and best practice were identified.

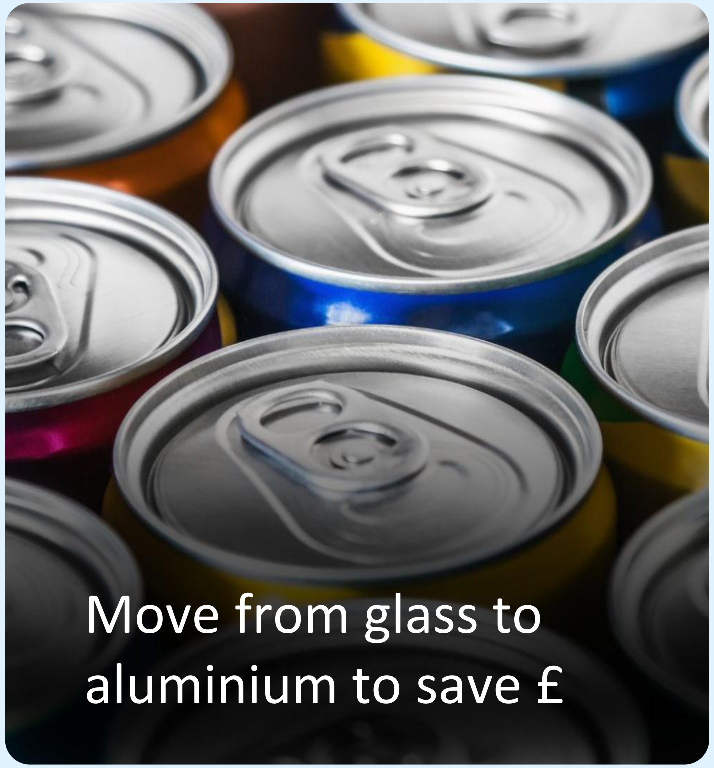
8 packaging formats assessed

Current and future recyclability criteria

>£500k annual potential savings identified

Multiple packaging optimisation opportunities identified, with savings ranging £20k-£150k, for a total of >£500k

1. Recyclability becoming a financial consideration



2. The rise (and reality) of paperisation

Continued movement from plastics to fibre

Benefits:

- Better recyclability outcomes
- Lower compliance costs (WMF, PRNs)

Risks and unintended consequences:

- Performance
- Recyclability assumptions

2. The rise (and reality) of paperisation

The Move from Plastics to Fibre

The industry continues to explore fibre-based alternatives, driven by sustainability commitments, consumer expectations and the potential to reduce plastic-related compliance costs.

Opportunity	Potential trade-off
Improved recyclability outcomes	Actual recyclability depends on packaging design and available infrastructure
Reduced Plastic PRN and WMF exposure	Fibre packaging may be heavier or require more material
Reduced use of conventional plastics	Coatings and laminates may affect recyclability
Stronger sustainability positioning	Product protection, shelf life and performance must be maintained

Main improvements

- Expanded the commercial, environmental and technical implications of paperisation.
- Avoided presenting fibre as automatically recyclable or lower cost.
- Strengthened the distinction between **perceived recyclability** and **real-world recycling outcomes**.
- Framed WMF and PRN savings as potential benefits rather than guaranteed outcomes.

2. The rise (and reality) of paperisation

Brief: Assess hot and cold cups against EPR RAM assessment criteria and identify savings from alternative packaging available from suppliers.

Project: Reviewed 13 hot cups from 4 suppliers and 9 lids and cold cups from 5 suppliers against EPR regulations, including modelling of unit costs and EPR forecasts against sales to find the real opportunity cost of packaging changes.

Outcome: Identified both formats where changes would not provide a benefit and areas where minor amendments to packaging from suppliers contributed to an 8% reduction in plastic content and over £750,000 in costs mitigated per year while retaining the product stability and value.

HORECA business

Opportunity: Replace plastic in suitable non-food contact applications

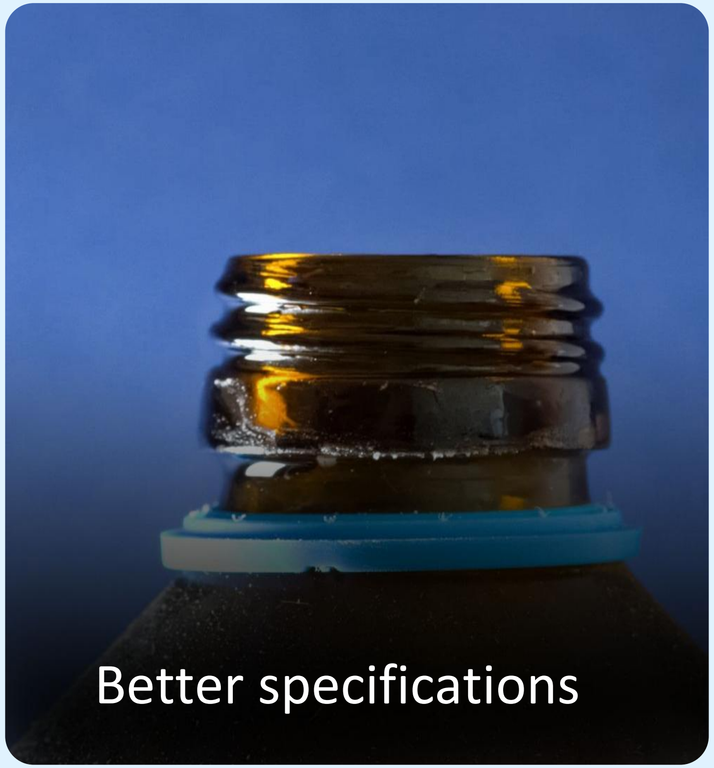
Commercial driver: Reduce exposure to plastic obligations and volatile PRN costs

Practical focus: Multipack and secondary packaging offer accessible opportunities

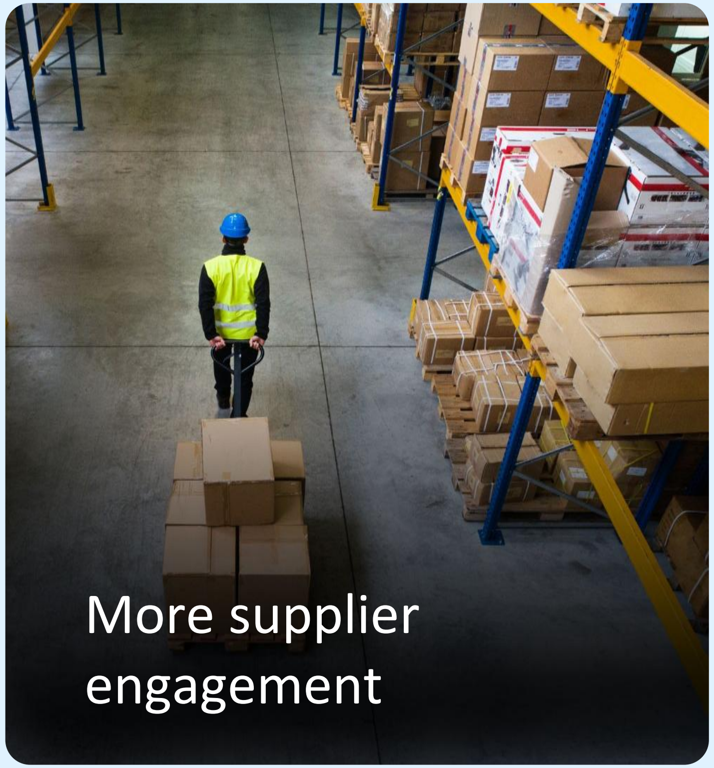
Key challenge: Food-contact packaging requires more complex technical, safety and performance considerations

Industry trend

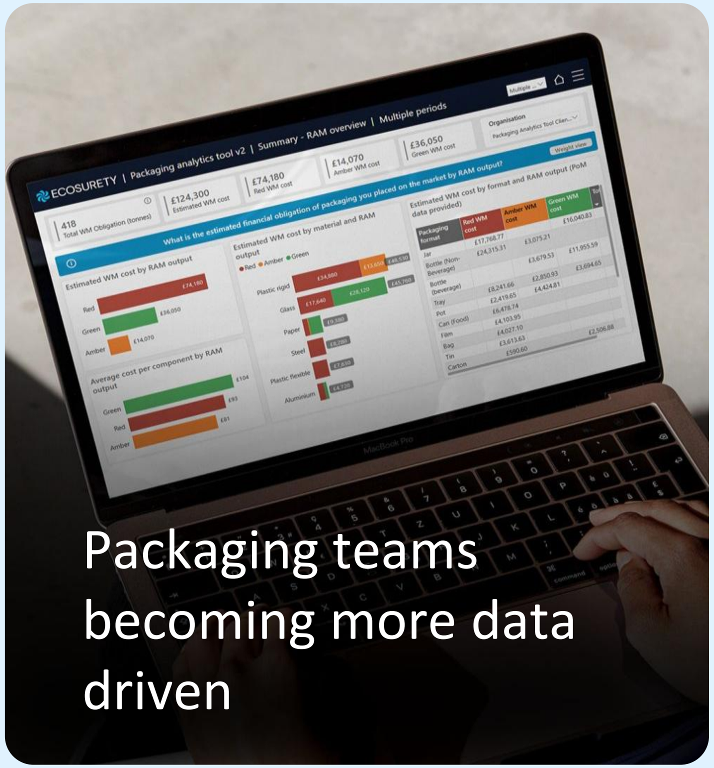
3. Packaging data becoming a strategic asset



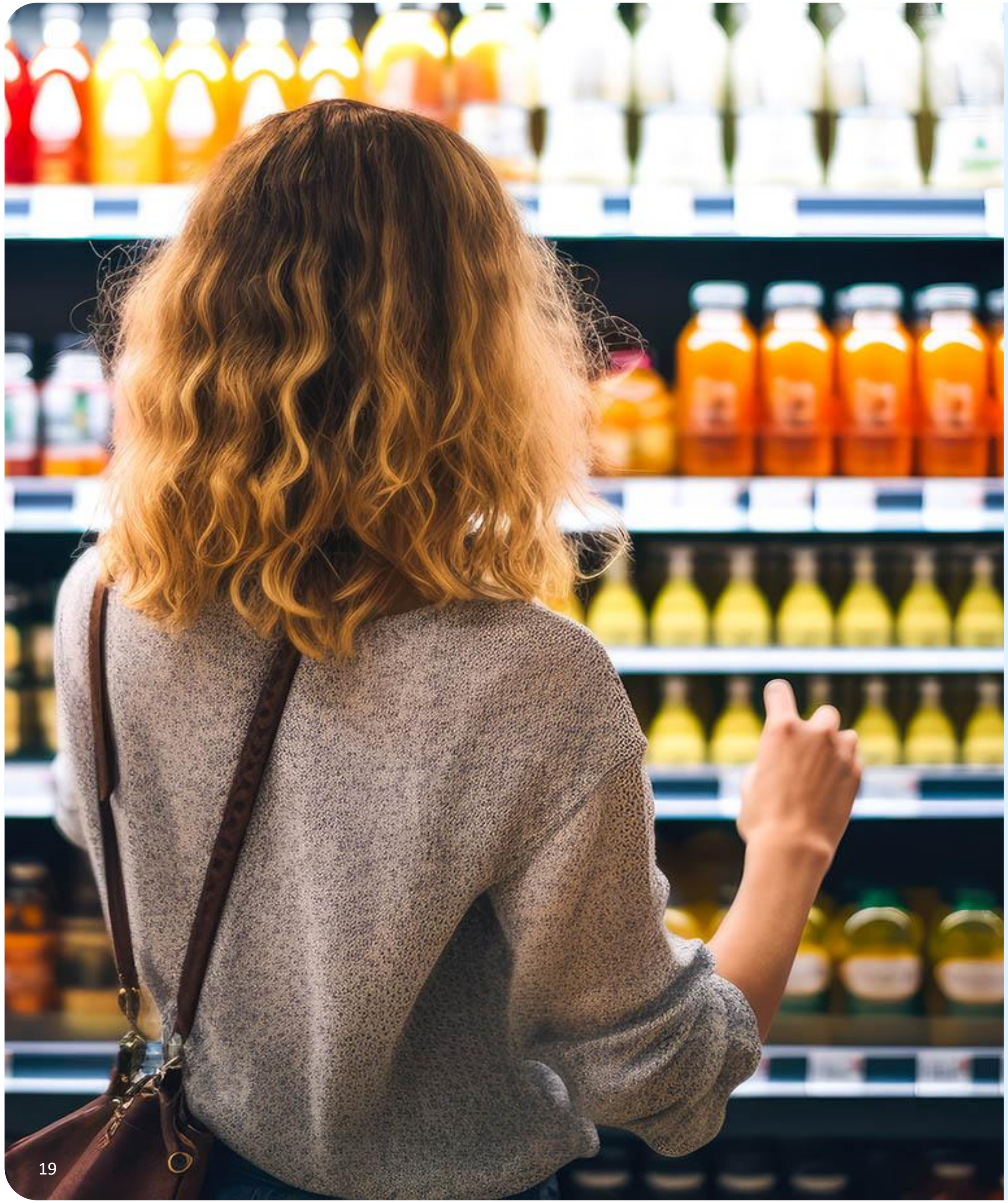
Better specifications



More supplier engagement



Packaging teams becoming more data driven



Unlocking £27m in EPR savings with improved RAM data

We helped a major UK retailer mitigate millions of pounds in forecasted EPR fees by strategically clarifying unknown RAM statuses.

Within just four weeks, our data project delivered confirmed RAM ratings for:

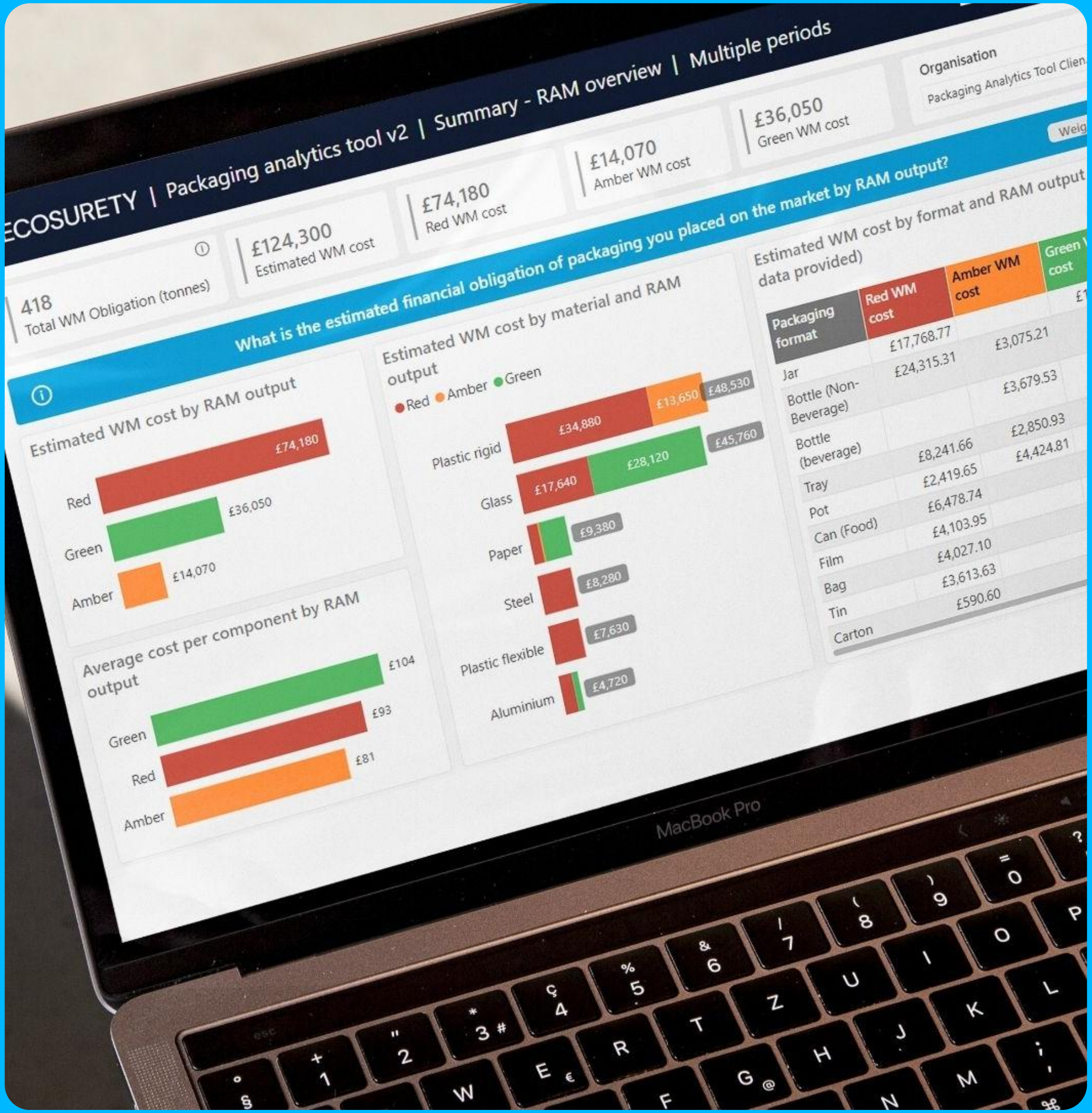
Over 6,200 SKUs

100 key suppliers

Over 75,000 tonnes of packaging

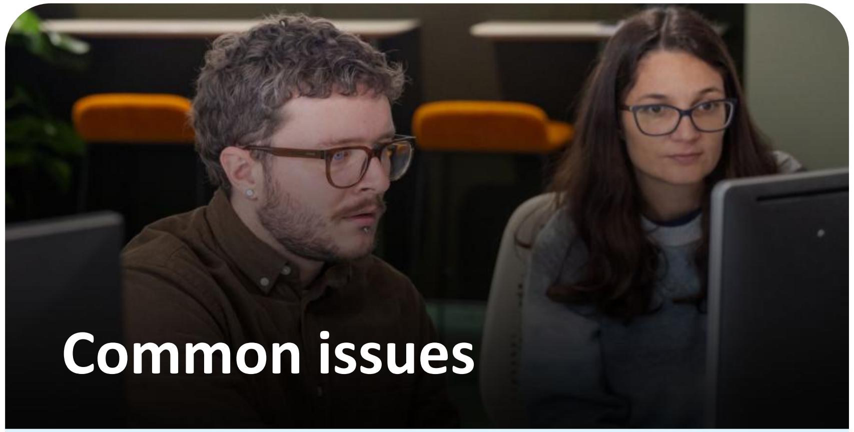
Delivering EPR cost mitigation of:

- ✓ **£2m+ in year one**
- ✓ **£27m+ over 3 years**



What does the data tell us about packaging portfolios?

Before changing packaging, understand where your biggest cost and recyclability opportunities actually exist



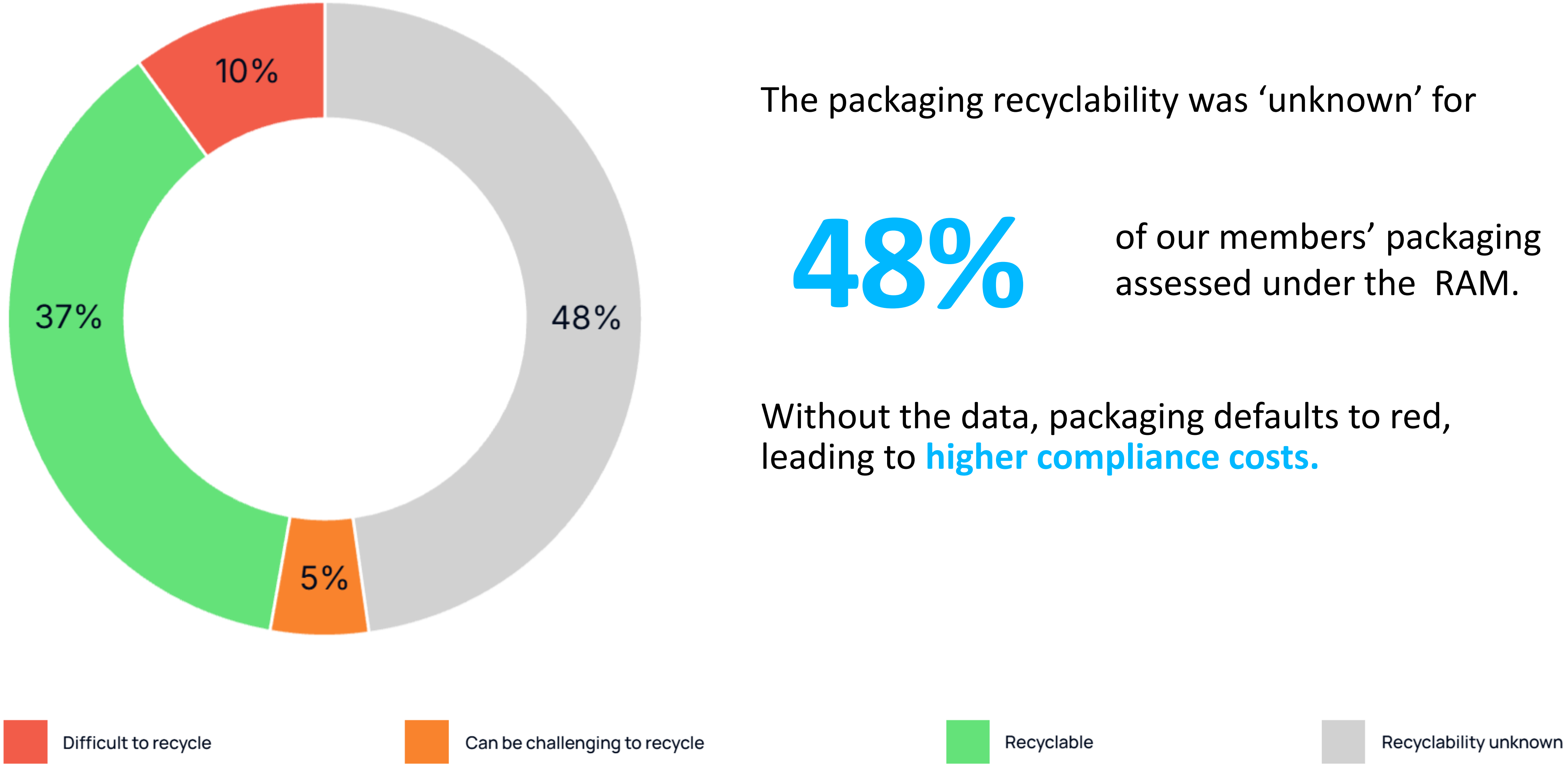
Common issues

- Missing data
- Packaging with poor recyclability outcomes

Common opportunities

- Better data quality
- Simplification
- Material substitution

Missing data is driving inaccurate RAM ratings



The packaging recyclability was 'unknown' for

48% of our members' packaging assessed under the RAM.

Without the data, packaging defaults to red, leading to **higher compliance costs.**

Data underpins better packaging decisions

Data → **Insight** → **Action** → **Outcome**

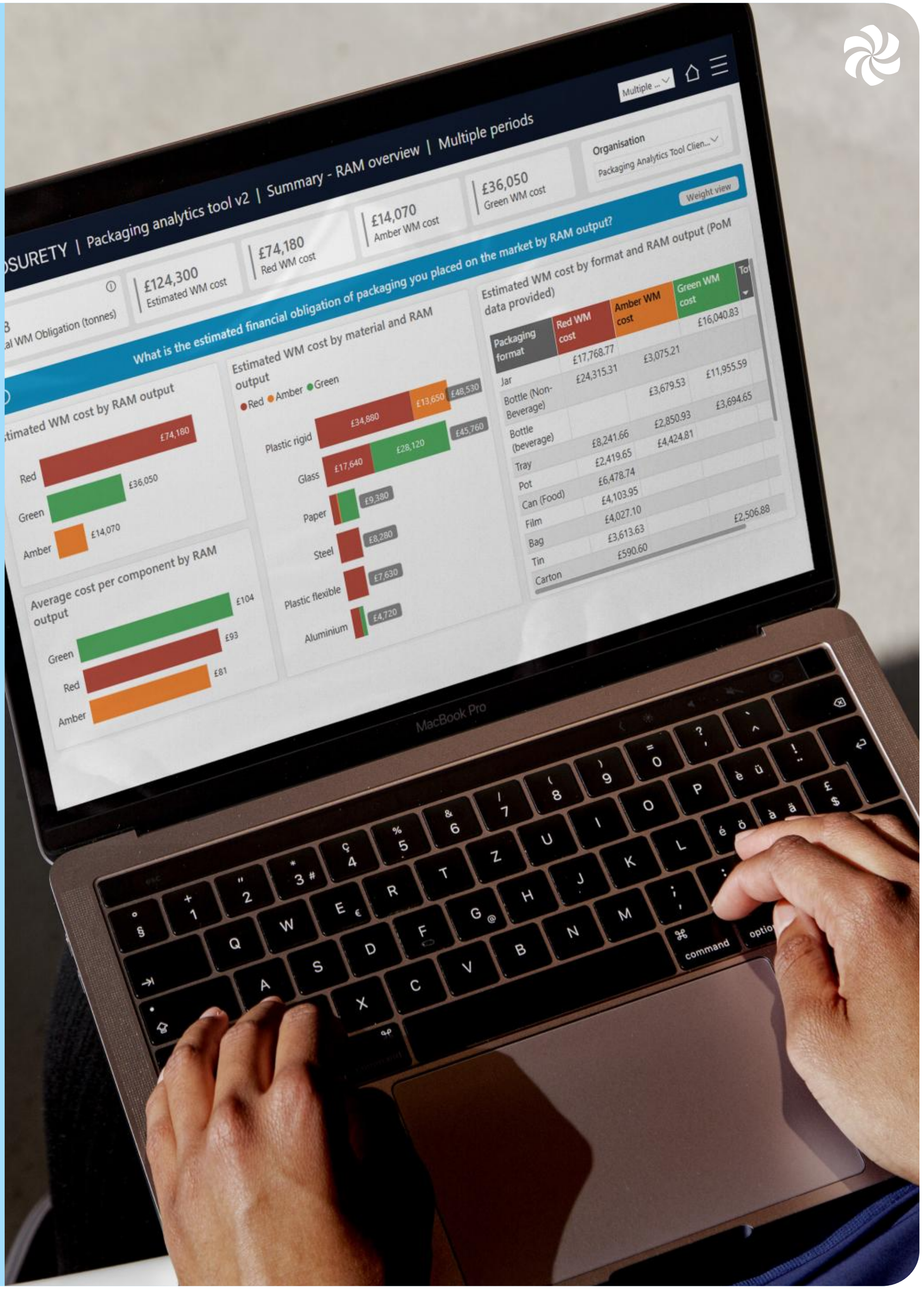
1. Which packaging formats drive most of your obligation?
2. Which components create the biggest recyclability challenges?
3. Which suppliers contribute most to risk?
4. What is the cost impact of changing materials?
5. What are the trade-offs?

Inform your packaging strategy

Our **Packaging Analytics Tool** provides deep-dive data insights to understand and drive improvements to your packaging.

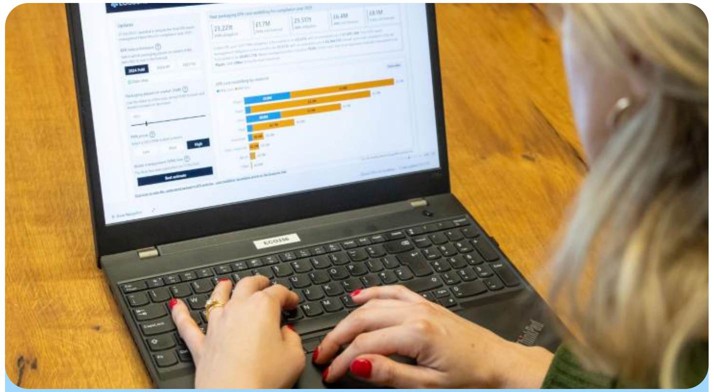
Essential analytics include:

- Deep-dive detail on all your packaging
- Analyse by supplier, material, component, product family, RAM output, EPR cost per unit and more
- Understand estimated PRN and Waste Management Fee costs
- Identification of data gaps areas to improve



Key takeaways

Understand your packaging data



Prioritise packaging changes based on evidence, not assumptions

Build packaging decisions around future recyclability and compliance requirements

Thank you

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Poll ideas

- Has your organisation reviewed any packaging formats in the last 12 months due to EPR or recyclability concerns?
    - Yes/no

How confident are you in your packaging data accuracy?

- Very confident
- Somewhat confident
- Not very confident
- Not sure

Questions (in case of no audience Qs)

- What packaging changes are you seeing most commonly across producers?
- How can organisations identify which packaging changes will have the biggest impact?
- What packaging trends do you expect to accelerate over the next two years?