

# Plastic Packaging Consumption Survey

Report to



**SURVEY: 28 MAY TO 30 JULY 2024** 

CONDUCTED VIA DYNATA

REPORT PREPARED BY LYN MAYES

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#### 1. Background

The Plastic Packaging consumption survey was instigated by the New Zealand Food & Grocery Council in 2020 and managed by Dynata as an independent data collection service.

Dynata collates survey results from all respondents and provides this data on a spreadsheet. The collated data is analysed by Lyn Mayes to report to the FGC's Sustainability Committee and to provide information as part of the NZFGC's contribution to the Plastic Packaging Product Stewardship Scheme (PPPS) project.

The grocery sector data from the 2022 survey has been used by Valpak in the development of a plastic packaging flows report for the PPPS.

The questionnaire was refined in 2022 with input from Plastics NZ and The Packaging Forum. The survey questions in the 2024 survey are consistent with the 2023 and 2022 survey questions. See Appendix.

In 2021, the survey was extended to include The Packaging Forum's Soft Plastic Recycling scheme members and in 2022 extended further to include non-food & grocery retailers and manufacturers.

In 2024, the survey was sent with an individual Dynata link to 493 brand owners and retailers plus 39 packaging manufacturers and logistics companies. The target companies are producers that are members of The NZFGC and The Packaging Forum as well as brands and retailers that have participated in the PPPS project. It is to be noted that those receiving the survey may not necessarily be users of plastic packaging.

## 2. Summary of Survey Responses (2022-2024)

In 2024, 66 companies responded to the survey (including 25 companies that did not report in 2023 or 2022).

In addition, data provided by respondents in the 2022 and 2023 surveys (that have not responded in the 2024 survey) has been added to the data set with the caveat that consumption may have changed overtime but that this data contributes to a more comprehensive picture of the grocery sector.

In total data is included from 142 (140 in 2023¹) organisations with further analysis conducted of the 131 (124 in 2023) companies that are involved in the grocery retail sector. Of these 25 companies are listed on the 2023 Deloitte Top 200 Index (highlighted in green below).

12 companies have reported from outside the grocery retail sector (highlighted in blue) and data from these companies is excluded from the analysis.

<sup>&</sup>lt;sup>1</sup> In the 2023 survey data from 2021 responses was included but is excluded from this survey

## 3. Assumptions & Report Limitations

As referenced in Section 2 above, to provide a more comprehensive estimate of data for the grocery sector, data supplied in previous surveys has been utilized.

Based on 131 grocery brands supplying data of which 19% are listed in the Top 200 companies, and considering the list of respondents, the following assumptions have been made:

For rigid plastic PET and HDPE rigid containers, following discussion with industry experts, we estimate that **85**% of the food and grocery market has been captured through the survey.

For resins the remaining resin categories, we estimate that **75**% of the food & grocery sector by volume and weight of plastic packaging is represented.

The totals are extrapolated to 100%. This is consistent with the methodology and assumptions made in 2023.

# 4. Summary of Estimated Data by Resin Type

The food and grocery sector places an estimated **99,170** tonnes of plastic on the market annually used for consumer products. There are a further 8,730 tonnes of back of house LDPE used for pallet wrap etc.

This is consistent with the estimated 97,000 tonnes in the 2023 survey (107,000 tonnes in the 2022 survey). Potential reasons for the variation is explained in Section 6 below.

2024 Survey –Grocery	PET	HDPE	PVC	LDPE	PP	PS/EPS	OTHER	TOTAL	B2B
	1	2	3	4	5	6	7	Consumer	LDPE
<b>Total Survey Tonnes</b>	26,726	13,618	850	7,372	10,391	842	18,942	78,093	6,548
Extrapolated to 100%	31,500	16,170	1130	9,830	13,900	1120	25,250	99,170	8,730
(rounded)									
2023 Data (extrapolated to 100%)	27,800	19,800	1110	15,100	12,330	1470	19,430	97,000	9,230
Variance	+3700	-3,630	20	-5000	+1570	-350	+5,820	+2,170	-500

# 5. Summary of Estimated Results by product type – food & grocery sector

2024 Survey – Food & Grocery including drinks	PET drinks bottles	PET rigid containers	HDPE drinks bottles	HDPE rigid containers	HDPE soft	PVC	LDPE soft	LDPE rigid tubes
Total by survey	16,292	10,434	8,442	4,410	766	850	7,372	202
Extrapolated to 100% rounded	19,200	12,300	9,950	5,200	1,020	1,130	9,830	270
2023 Survey Data @ 100%	15,540	12,337	12,678	4761	2,273	1,111	14,332	759
2022 Survey Data @100%	23,920	6,467	22,861	4891	1967	520	13,063	764
Variance 24/23	+3,660	-37	-2728	+439	-1,253	+19	-4,502	-489
	PP rigid	PP soft	PS	EPS	Other Multi- Layer	LPB	PLA	B2B LDPE
Total by survey @75%	7,130	3,261	610	232	11,703	7,102	137	6548
Extrapolated to 100%	9,500	4,400	810	310	15,600	9,470	180	8,730
2023 Survey Data @100%	8,875	3,456	1,161	309	15,275	3,839	315	9,230
2022 Survey Data @100%	9,435	2,352	1,449	120	15,121	3,985	310	
Variance 24/23	+625	+944	-351	+1	+325	+5,631	-135	-500

### 6. Analysis of Data

#### 6.1 Kerbside Collections

Under the kerbside collection regulations, plastic bottles, trays and containers that are numbered 1,2 & 5 are accepted in kerbside recycling bins. Containers smaller than 50mm or larger than 4 litres cannot be recycled at kerbside and all lids must be removed unless tethered to the bottle. The survey does not request or report data on size or whether the component is a lid however an estimated 56,150 tonnes or 56% of the total estimated food and grocery plastic consumption is rigid 1,2 & 5.

The waste sector advises that only clear or natural plastic containers are a valuable resource with black plastic considered a contaminant and coloured or white plastic packaging receiving a lesser value (if at all).

An estimated 71% of the plastic packaging which could be accepted at kerbside is clear.

On this basis an estimated 39,900 tonnes of plastic packaging that could be collected at kerbside has a value. This equates to around 40% of the total plastic placed on market by the sector.

#### 6.2 Soft Plastic

Soft plastic packaging may be recyclable if it meets the material thresholds set by the Soft Plastic Recycling Scheme. In the survey, soft plastic packaging was reported as follows:

Soft plastic	2024	2023
	Tonnes	Tonnes
HDPE	1,020	2,273
LDPE	9,830	14,432
PP	4,400	3,456
Multi-Layer composites- other	15,600	15,274
Total	30,850	35,435

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 would not then be accepted for recycling.

## 7. Assumptions: Changes in Consumption Tonnes

It must first be noted that assumptions have been made for extrapolating the data submitted by companies to estimate the total consumption for the sector. The 2024 data includes the major milk producers and supermarkets.

Overall, the total plastic consumption is consistent with 2023 data although the composition by resin type varies.

There are variations showing for PET and HDPE. PET consumption indicates 61% bottles to 39% trays and other rigid PET which is consistent with industry guidance from what is being recovered at MRFs. PET bottle consumption has increased by 3,660 tonnes with HDPE bottles reducing by 2728 tonnes.

Variations between how soft plastic packaging including composites are reported may account for the variations in these resin types. The reduction in soft plastic overall is balanced by an upturn in fibre composite packaging which may signal a shift towards fibre-based packaging.

# 8. Recycled Content

An estimated 17% of all plastic packaging (23% in 2023) contains recycled content comprising:

- 42% PET bottles
- 39% PET rigid
- 1% HDPE bottles
- 17% HDPE rigid
- 2% LDPE; and
- 9% PP content.

appendix: Survey questionnaire	

Hello and thank you for participating in our fifth Plastics Survey from the NZFGC Sustainability Committee. This questionnaire started as a way to collate data on the food and grocery sector but has expanded to include the non-grocery sector in partnership with The Packaging Forum, Retail NZ, Cosmetics NZ, Plastics NZ and other organisations. This survey is now of critical importance to complete the design of a mandatory plastic packaging stewardship scheme (PPPS) which requires accurate data to determine potential producer levy costs. See <a href="https://ppps.org.nz/">https://ppps.org.nz/</a> for more information on mandatory stewardship.

Please pass this survey to the appropriate person in your business and encourage them in the importance of completing this.

The survey scope is for consumer products and Private Label *sold at retail or wholesale* (noting that we have also asked you to report on your B2B consumption of pallet wrap), and data for the 12-month period (April 2023 to March 2024) inclusive (or as near as possible). If you would like your plastic packaging supplier to complete this survey on your behalf, please provide us with contact details.

The Government introduced new standards for materials collected at kerbside in February and only resin codes 1, 2 and 5 (excluding caps and lids) are now collected at kerbside. Industry funded take back systems are in place for soft plastic packaging, food and beverage cartons and some other products. Some single use packaging has already been phased out such as PVC (3) and PS (6) containers and produce bags with all other PVC and PS food and drink packaging due for phase out in 2025.

However, a mandatory PPPS will cover all plastic packaging as defined in the <u>Gazette notice - declaration of priority products</u> and applies to all producers or importers of products in plastic packaging that are placed on the market via a retailer or wholesaler in New Zealand *including the hospitality sector*. This survey includes all resin codes and has been further split into categories such as rigid materials; drinks bottles; soft plastic; plastic lined fibre; compostable plastic, pallet wrap. This year additional examples have been added to support non grocery packaging suppliers.

#### How will this data be used?

An independent party (Dynata) will be collating the results. By participating in this survey, you acknowledge that these results will be shared at a top level and no individual businesses will be identified. It would be much appreciated if you can please complete this by Friday, July 5, 2024, which will give us time to analyse the data to and make it available to the Plastic Packaging Product Stewardship Project Team which must complete its recommendations on the scheme design by end July 2024.

Kind regards, Cameron Scott, Chair

Which of the following best describes your organisation?

□ Food and Grocery
□ Non-Grocery
□ Hospitality
□ Commercial and Industrial

Which of the following plastics does your company use to packaging your **consumer products**? Please select as many as apply.

				Different Plastic Packagi	ng Types				
Plastic ID Code	1	1	2	2	2	3	4	4	4
Plastic Type	PET Polyethylene Terephthalate Drinks bottles	PET Polyethylene Terephthalate Rigid containers	HDPE High-Density Polyethylene Bottles	HDPE High-Density Polyethylene Rigid containers	HDPE High-Density Polyethylene Soft Plastics	PVC Polyvinyl Chloride Rigid Containers	LDPE Low-Density Polyethylene Soft Plastics (single polymer)	LDPE Low-Density Polyethylene Rigid Containers/Tubes	LDPE Low-Density Polyethylene B2B Soft Plastics
Code for Survey	1	1.1	2	2.1	2.2	3	4	4.1	4.2
Examples of Current Packaging Products	Drink bottles     Soft drink bottles     Sport drink bottles     Single-serve water	Meat and Other Trays     Punnets     Clamshells     Ketchup bottles     Salad dressing     Vegetable oil bottles     Peanut butter jars     Honey containers     Vitamins     Personal Care     Other	Milk bottles     Juice bottles	Janitorial containers     Personal care products     Vinegar     Syrup containers     Tubes     Bottle lids/caps	Stand up pouches	Takeaway containers Cracker/biscuit trays Bags or sleeves on PET bottles Packaging for tamper resistant over the counter medications Shrink wrap for a variety of products Blister pack	Cling film Bubble wrap Bags: bread, cereal, chip, courier, frozen food, pasta, rice Fresh produce, pet food, garden product bags Wrap: confectionery, biscuit, dairy, hygiene, snack products, clothing and general merchandise Drycleaning bags	Squeezable bottles     Ketchup bottles     Mustard bottles     Tubes (toothpaste)	Pallet wrap     Shrink wrap
None of the above		•	1		1	1	'	1	

			Different Plasti	c Packaging Types			
Plastic ID Code	5	5	6	6	7	7	7
Plastic Type	PP Polypropylene Rigid containers	PP Polypropylene BOPP Soft plastics	PS Polystyrene (PS) Rigid Containers	Expanded Polystyrene (EPS) Cold chain, takeaway and protective packaging	Other Mixed Layers of Plastic PE/PP/ Nylon/ Foil/ PET	Other Mixed Layers of Plastic Plastic lined Fibre	Other PLA Compostable plastic
Code for Survey	5	5.1	6	6.1	7	7.1	7.2
Examples of Current Packaging Products	Takeaway containers Microwave ready meal containers Refrigerated food containers Bottle lids/caps Large yogurt tubs Margarine container Ice cream container Dip pottles Prescription drug bottles Honey pottles	Gusseted bags (reusable shopping bags) Strapping tape Flexible films Sachets Woven Sacks (bulk)	Sushi packs Meat trays HIPS (high impact) Deli and bakery trays	Styrofoam cups Meat trays Coffee cup lids Foam packaging Clamshell – fast food containers, wine cooler packaging Fast food containers, wine cooler packaging John Cooler packaging/Seafood poly bins	Multi-layer laminates, composite film, high barrier packaging     Food pouches	Liquid paper board and plastic lined fibre packaging Coffee cups Fibre based ice cream containers Complex/Functional Fibre (any fibre with a plastic lining or coating)	PLA water bottles Compostable plastic bags and pouches Coffee cup lids "Landfill degradable" wrap, tape, bags, strapping Compostable/landfill degradable plant pots/soil bags

	Plant pots			EPS protective packaging (electronics, appliances, homewares, etc)			
None of the above							

You mentioned you have used **PET Polyethylene Terephthalate and Drink Bottles** to package your consumer products, can you please provide the following information about this?

If multiple components, i.e., lids, sleeves, labels, etc, indicate the resin type of the components.

Resin Code & Plastic Type	Packaging Product Type	Total Tonnes in Clear	Total Tonnes in Black	Total Tonnes in Colour (including White)	Total Volume (Tonnes/annum)
	□ Drink bottles				
1	□ Soft drink bottles				
PET	☐ Sport drink bottles				
Polyethylene Terephthalate and	☐ Single-serve water				0
Drink Bottles (Clear)	□ Other				
	□ Other				

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You mentioned you have used PET Polyethylene Terephthalate and Rigid Containers to package your consumer products, can you please provide the following information about this?

If multiple components, i.e., lids, sleeves, labels, etc, indicate the resin type of the components.

Resin Code & Plastic Type	Packaging Product Type	Total Tonnes in Clear	Total Tonnes in Black	Total Tonnes in Colour (including White)	Total Volume (Tonnes/annum)
	☐ Meat and other trays				
	□ Punnets				
	□ Clamshells				
1.1	☐ Ketchup bottles				
PET	□ Salad dressing				
Polyethylene	□ Vegetable oil bottles				0
Terephthalate and Rigid Containers	□ Peanut butter jars				
	☐ Honey containers				
	□ Vitamins				
	□ Personal care products				
	□ Other				

Recycled Content %

You mentioned you have used HDPE High-Density Polyethylene and Bottles to package your consumer products, can you please provide the following information about this?

If multiple components, i.e., lids, sleeves, labels, etc, indicate the resin type of the components.

Resin Code & Plastic Type	Packaging Product Type	Total Tonnes in Clear	Total Tonnes in Black	Total Tonnes in Colour (including White)	Total Volume (Tonnes/annum)
2 HDPE High-Density Polyethylene and Bottles	☐ Milk bottles ☐ Juice bottles ☐ Other				0

ecycled Content %
•

You mentioned you have used HDPE High-Density Polyethylene and Rigid Containers to package your consumer products, can you please provide the following information about this?

If multiple components, i.e., lids, sleeves, labels, etc, indicate the resin type of the components.

Resin Code & Plastic Type	Packaging Product Type	Total Tonnes in Clear	Total Tonnes in Black	Total Tonnes in Colour (including White)	Total Volume (Tonnes/annum)
2.1  HDPE  High-Density  Polyethylene  and Rigid Containers	<ul> <li>□ Janitorial containers</li> <li>□ Personal care products</li> <li>□ Vinegar</li> <li>□ Syrup containers</li> <li>□ Tubes</li> <li>□ Bottle lids/caps</li> <li>□ Other</li> </ul>				0

t %
t %
<del>f</del> %

You mentioned you have used HDPE High-Density Polyethylene and Soft Plastic to package your consumer products, can you please provide the following information about this?

If multiple components, i.e., lids, sleeves, labels, etc, indicate the resin type of the components.

Resin Code & Plastic Type	Packaging Product Type	Total Tonnes in Clear	Total Tonnes in Black	Total Tonnes in Colour (including White)	Total Volume (Tonnes/annum)
2.2  HDPE  High-Density  Polyethylene  and Soft Plastics	□ Bags □ Stand up pouches □ Other				0

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You mentioned you have used PVC Polyvinyl Chloride Rigid Containers to package your consumer products, can you please provide the following information about this?

If multiple components, i.e., lids, sleeves, labels, etc, indicate the resin type of the components.

Resin Code & Plastic Type	Packaging Product Type	Total Tonnes in Clear	Total Tonnes in Black	Total Tonnes in Colour (including White)	Total Volume (Tonnes/annum)
3 PVC Polyvinyl Chloride Rigid Containers	□ Takeaway containers         □ Cracker/biscuit trays         □ Bags or sleeves on PET bottles         □ Packaging for tamper resistant over the counter medications         □ Shrink wrap for a variety of products         □ Blister pack         □ Other				0

You mentioned you have used LDPE Low-Density Polyethylene and Soft Plastics (mono/single polymer) to package your consumer products, can you please provide the following information about this?

If multiple components, i.e., lids, sleeves, labels, etc, indicate the resin type of the components.

Resin Code & Plastic Type	Packaging Product Type	Total Tonnes in Clear	Total Tonnes in Black	Total Tonnes in Colour (including White)	Total Volume (Tonnes/annum)
4  LDPE  Low-Density  Polyethylene  and Soft Plastics  (mono/single polymer)	<ul> <li>□ Cling film</li> <li>□ Bubble wrap</li> <li>□ Bags: bread, cereal, chip, courier, frozen food, pasta, rice</li> <li>□ Fresh produce, pet food, garden product bags</li> <li>□ Wrap: confectionery, biscuit, dairy, hygiene, snack products, clothing and general merchandise</li> <li>□ Drycleaning bags</li> <li>□ Other</li> </ul>				0

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You mentioned you have used LDPE Low-Density Polyethylene and Rigid Containers/Tubes to package your consumer products, can you please provide the following information about this?

If multiple components, i.e., lids, sleeves, labels, etc, indicate the resin type of the components.

Resin Code & Plastic Type	Packaging Product Type	Total Tonnes in Clear	Total Tonnes in Black	Total Tonnes in Colour (including White)	Total Volume (Tonnes/annum)
4.1  LDPE  Low-Density  Polyethylene  and Rigid  Containers/Tubes	□ Squeezable bottles □ Ketchup bottles □ Mustard bottles □ Tubes (toothpaste) □ Other				0

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You mentioned you have used LDPE Low-Density Polyethylene and B2B Soft Plastics to package your consumer products, can you please provide the following information about this?

If multiple components, i.e., lids, sleeves, labels, etc, indicate the resin type of the components.

Resin Code & Plastic Type	Packaging Product Type	Total Tonnes in Clear	Total Tonnes in Black	Total Tonnes in Colour (including White)	Total Volume (Tonnes/annum)
4.2  LDPE  Low-Density  Polyethylene  and B2B Soft Plastics	□ Pallet wrap □ Shrink wrap □ Other				0

ecycled Content %	Recycled Content %	Recycled Content %	
ecycled Content %	Recycled Content %	Recycled Content %	
ecycled Content %	Recycled Content %	Recycled Content %	
	object Content //	55) 5154 5511511 /5	ecycled Content %

You mentioned you have used PP Polypropylene and Rigid Containers to package your consumer products, can you please provide the following information about this?

If multiple components, i.e., lids, sleeves, labels, etc, indicate the resin type of the components.

Resin Code & Plastic Type	Packaging Product Type	Total Tonnes in Clear	Total Tonnes in Black	Total Tonnes in Colour (including White)	Total Volume (Tonnes/annum)
5 PP Polypropylene Rigid Containers	Takeaway containers	Total Tonnes in Clear	Total Tonnes in Black		
Recycled Content %					

You mentioned you have used PP Polypropylene, BOPP and Soft Plastics to package your consumer products, can you please provide the following information about this?

If multiple components, i.e., lids, sleeves, labels, etc, indicate the resin type of the components.

Resin Code & Plastic Type	Packaging Product Type	Total Tonnes in Clear	Total Tonnes in Black	Total Tonnes in Colour (including White)	Total Volume (Tonnes/annum)
5.1 PP Polypropylene BOPP Soft Plastics	□ Gusseted bags (reusable shopping bags) □ Strapping tape □ Flexible films □ Sachets □ Woven Sacks (bulk) □ Other				0

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You mentioned you have used PS Polystyrene (PS) Rigid Containers to package your consumer products, can you please provide the following information about this?

If multiple components, i.e., lids, sleeves, labels, etc, indicate the resin type of the components.

Resin Code & Plastic Type	Packaging Product Type	Total Tonnes in Clear	Total Tonnes in Black	Total Tonnes in Colour (including White)	Total Volume (Tonnes/annum)
	□ Sushi packs				
6	☐ Meat trays				
PS	☐ HIPS (high impact)				0
Polystyrene (PS) Rigid Containers	□ Deli and bakery trays				
	□ Other				

You mentioned you have used Expanded Polystyrene (EPS) Cold Chain, Takeaway and Protective Packaging to package your consumer products, can you please provide the following information about this?

If multiple components, i.e., lids, sleeves, labels, etc, indicate the resin type of the components.

Resin Code & Plastic Type	Packaging Product Type	Total Tonnes in Clear	Total Tonnes in Black	Total Tonnes in Colour (including White)	Total Volume (Tonnes/annum)
6.1  Expanded Polystyrene (EPS) Cold chain, Takeaway and Protective Packaging	<ul> <li>□ Styrofoam cups</li> <li>□ Meat trays</li> <li>□ Coffee cup lids</li> <li>□ Foam packaging</li> <li>□ Clamshell – fast food containers, wine cooler packaging</li> <li>□ Fast food containers, wine cooler packaging/Seafood poly bins</li> <li>□ EPS protective packaging (electronics, appliances,</li> </ul>	Total Tonnes in Clear	Total Tonnes in Black		
	homewares, etc)				

You mentioned you have used Other Mixed Layers of Plastic – PE, PP, Nylon, Foil and PET to package your consumer products, can you please provide the following information about this?

If multiple components, i.e., lids, sleeves, labels, etc, indicate the resin type of the components.

Resin Code & Plastic Type	Packaging Product Type	Total Tonnes in Clear	Total Tonnes in Black	Total Tonnes in Colour (including White)	Total Volume (Tonnes/annum)
7 Other Mixed Layers of Plastic PE, PP, Nylon, Foil and PET	<ul> <li>☐ Multi-layer laminates, composite film, high barrier packaging</li> <li>☐ Food pouches</li> <li>☐ Other</li> </ul>				0

You mentioned you have used Other Mixed Layers of Plastic - Plastic Lined Fibre to package your consumer products, can you please provide the following information about this?

If multiple components, i.e., lids, sleeves, labels, etc, indicate the resin type of the components.

Resin Code & Plastic Type	Packaging Product Type	Total Tonnes in Clear	Total Tonnes in Black	Total Tonnes in Colour (including White)	Total Volume (Tonnes/annum)
7.1 Other Mixed Layers of Plastic Plastic Lined Fibre	<ul> <li>□ Liquid paper board and plastic lined fibre packaging</li> <li>□ Coffee cups</li> <li>□ Fibre based ice cream containers</li> <li>□ Complex/Functional Fibre (any fibre with a plastic lining or coating)</li> <li>□ Other</li> </ul>				0

You mentioned you have used Other, PLA and Compostable Plastic to package your consumer products, can you please provide the following information about this?

If multiple components, i.e., lids, sleeves, labels, etc, indicate the resin type of the components.

Resin Code & Plastic Type	Packaging Product Type	Total Tonnes in Clear	Total Tonnes in Black	Total Tonnes in Colour (including White)	Total Volume (Tonnes/annum)
7.2 Other, PLA and Compostable Plastic	<ul> <li>□ PLA water bottles</li> <li>□ Compostable plastic bags and pouches</li> <li>□ Coffee cup lids</li> <li>□ "Landfill degradable" wrap, tape, bags, strapping</li> <li>□ Compostable/ landfill degradable plant pots/soil bags</li> <li>□ Other</li> </ul>				0

ease provide any other relevant information on your organisation's plastic packaging.	
ease type your answer into the box below.	