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food research**

part of SAGENTIA REGULATORY

Beyond the EU & US: global packaging regulations

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Global packaging waste reform



Contents



**Turn packaging
from waste to a
controlled,
circular asset**

Diverse...diverging...approaches...across different regions

CANADA

Mature EPR system;
looking to advance and harmonise

LATIN AMERICA

Building around 'reverse logistics' and EPR mechanisms

APAC

Leading on product design

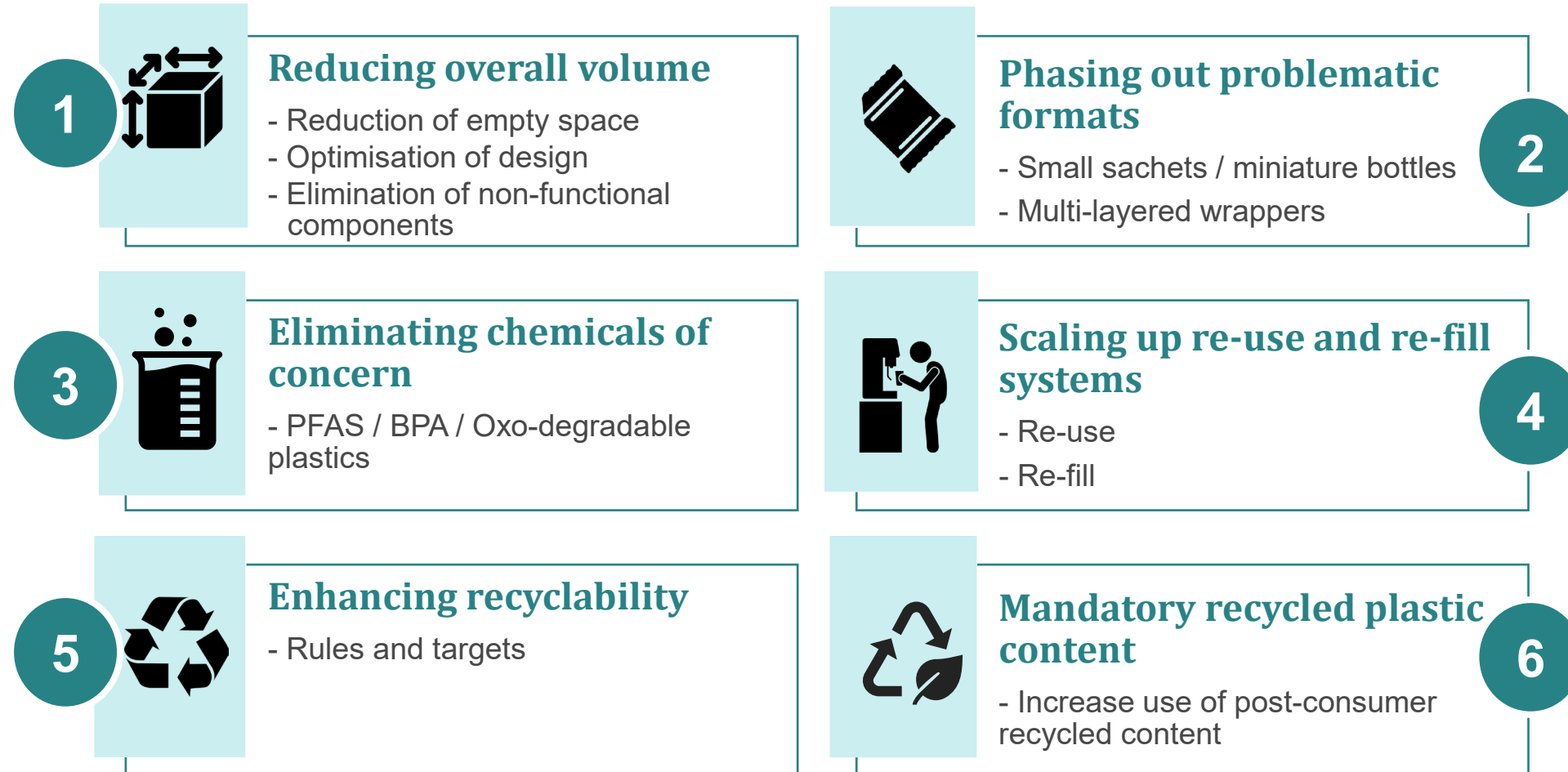
AFRICA & MIDDLE EAST

Building up rapidly the EPR systems and recycling infrastructure

Six global trends



Six global trends



Regulatory intent is aligned, but execution is not



The six trends look consistent globally



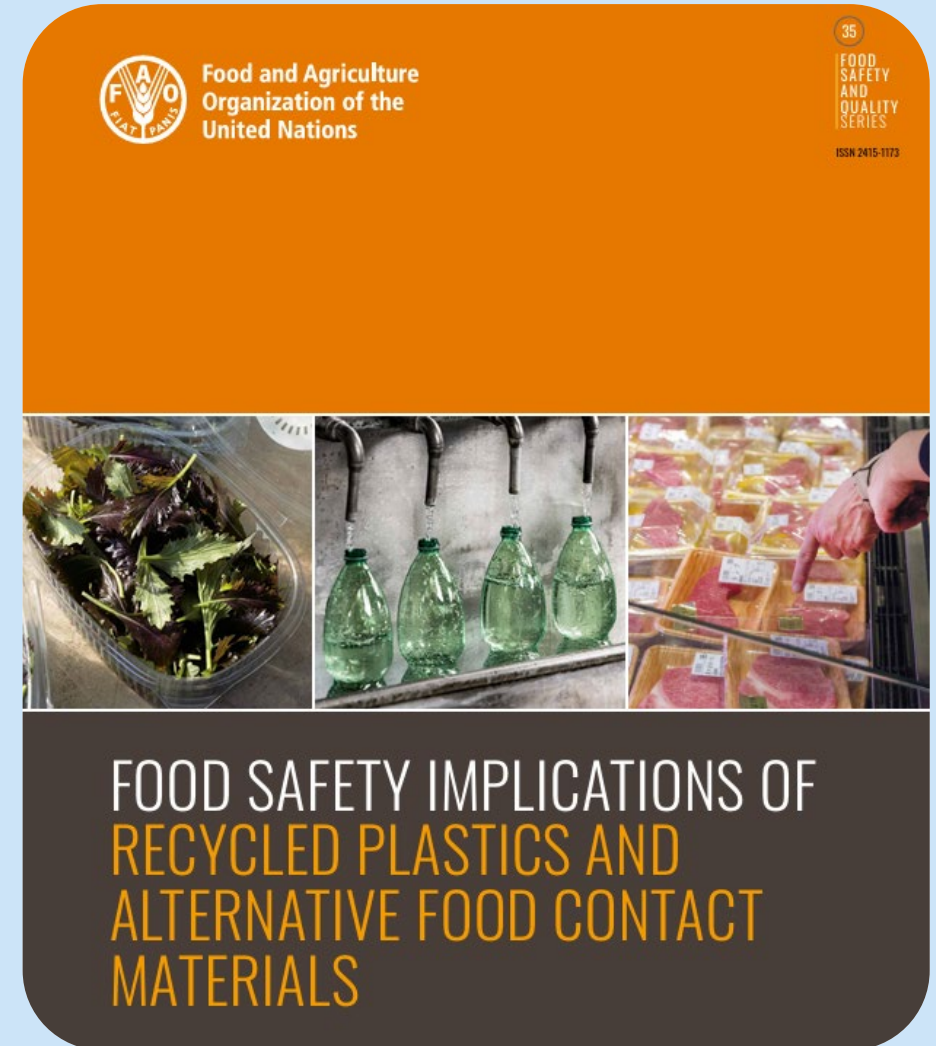
But countries are not implementing them in the same way or at the same speed



This is where complexity starts to build for businesses

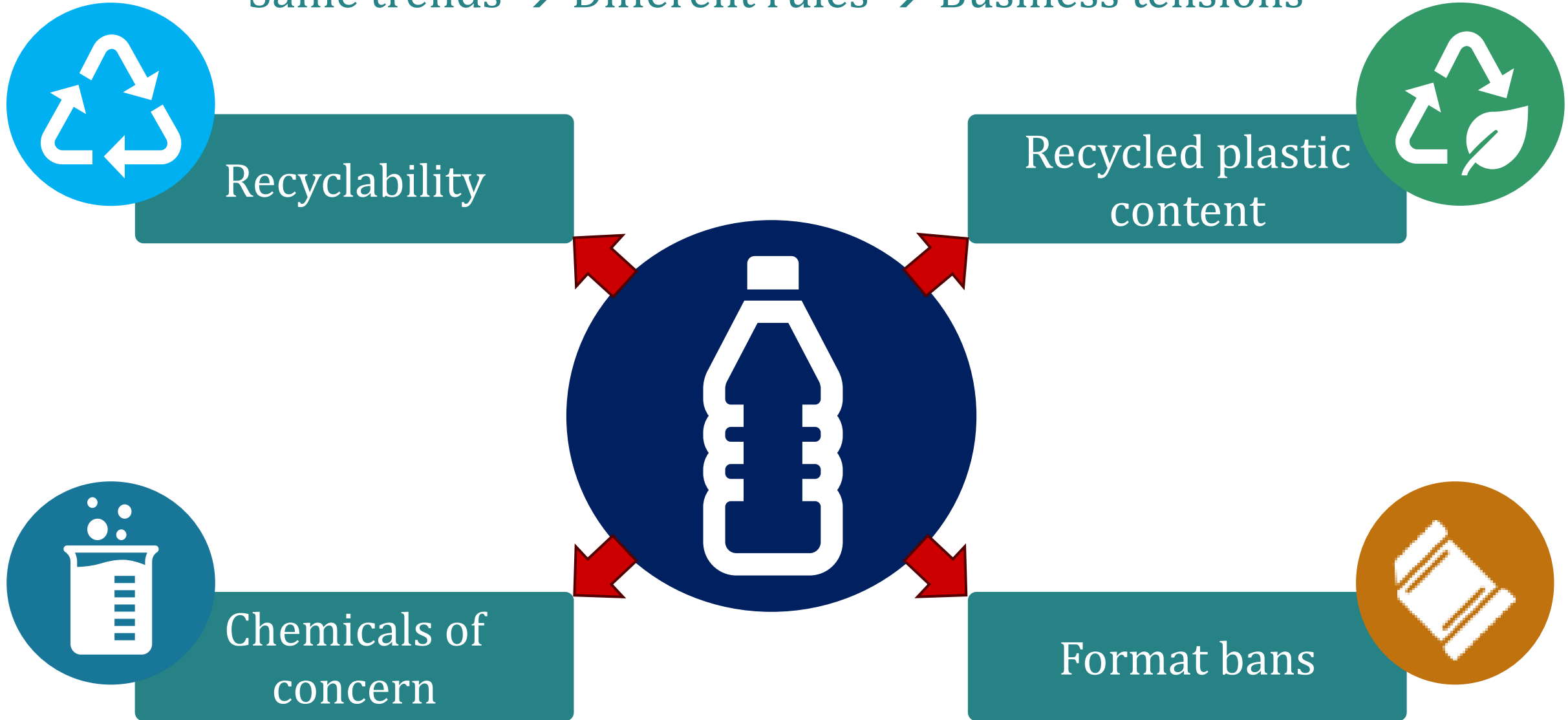
Are recycled plastics safe?

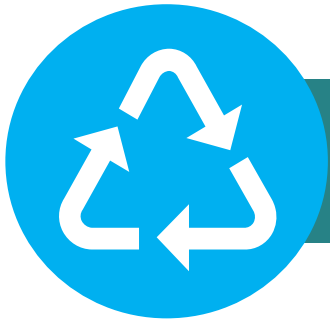
- Food safety risks linked to:
 - Recycled plastics in food packaging
 - Micro- and nano-plastics in FCMs
 - Alternative materials (bioplastics, plant-based...)
- Main concern: chemical contamination risks increase with recycling
- Look at:
 - Establishing and maintaining strict waste stream controls
 - Implementing robust sorting, cleaning and decontamination processes
 - Improving stronger analytical capabilities to better identify, characterise and quantify micro-/nano-plastics, etc.



Same trends → Different rules → Business tensions

Same trends → Different rules → Business tensions





Recyclability



UK

- 3 tier recyclability rating (RAM)
- Mandatory EPR fees linked to recyclability

Recyclable

Recyclable with
practical
challenges

Difficult to
recycle



South Korea

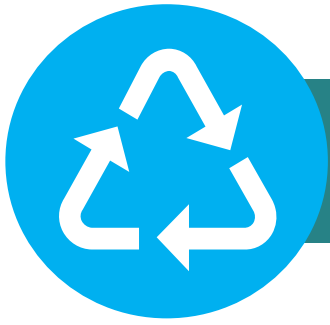
- 4-tier recyclability rating
- Higher fees for "Difficult" packaging (+10-20%+)
- Mandatory requirement to have "Difficult" label

Excellent for
recycling

Good

Normal

Difficult to
recycle



Recyclability



Canada: Exp. 2027: Proposed Recyclability Labelling Framework *based on whether recycling programmes are there or not..*



Recyclable claims require $\geq 80\%$ Canadian access to recycling programmes.



Non-recyclable claims required where local recycling infrastructure is unavailable.



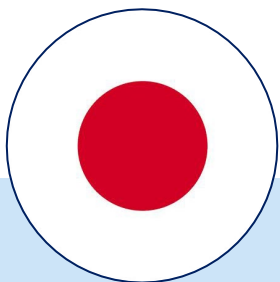
Recycling collection claims permitted where products are collected through local recycling programmes, even if they may not ultimately be recycled.

By 2030

- will no longer be allowed
- all plastic packaging and SUPs will be labelled as either recyclable or non recyclable....”



Recycled plastic content



Voluntary certification framework

Japan – designed in 2025

- 15% - 100% recycled plastic content in PET bottles
 - 1st certificate issued in Feb 2026
 - Suntory Food & Beverage's GREEN DA - KA - RA Gentle Mugicha 680 mL PET bottle



*produced using
100% recycled
PET (rPET)*



Mandatory recycled content requirements

South Korea

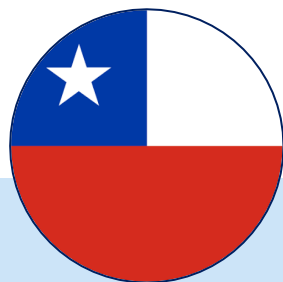
- Jan 2026: 10% rPET for large bottled water/non-alcoholic beverage producers that use 5000 tonnes or more
- Jan 2027: proposed increase to 15%

South Africa

- Pending approval since 2024
- Several proposed targets for different types:
 - E.g. 10% rPET in bev bottles by 2026 / 20% by 2030



Format bans



Chile: from 02.2026: location of consumption



Dine-in

- No SUPs permitted



Takeaway/delivery

- Delivery of disposal products is permitted, but only if made from recoverable non-plastic materials / certified compostable plastics



Australia

- No national alignment; implementation expected 2026–27 post-consultation
- State-led bans

Pre-filled soy sauce containers < 30 ml



09.2025



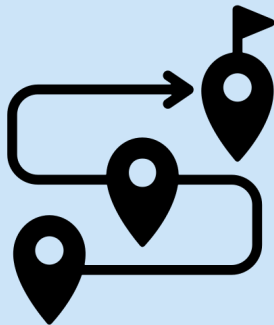


Chemicals of concern



Brazil

- Proposal submitted to Congress for approval in 2023
- Policy proposed annual reporting and progressive elimination of PFAS



India

- Draft regulation published in October 2025
- Immediate prohibition of PFAS in all FCMs
- Requirement to have BPA-free FCMs



Other headlines



Chile: adjustment to reuse targets

- From Feb 2026, large supermarkets must ensure that at least 30% of beverages are in returnable plastic bottles
- July 2026: Proposed delay of 30% returnable beverage container requirement to 7 Jan 2028
- Proposal linked to limited availability of returnable beverage products
- Measures to streamline certification of selected biodegradable products



Proposed amendment to restrict use of PET cans with aluminum

- Public consultation ended on 21 Sept 2026
- Ban expected from 1 Jan 2028, if implemented



Regulation is regional — compliance must be market-specific



One global packaging strategy won't be enough

Markets are moving at different speeds, with different definitions, targets and enforcement models



Country-level obligations are becoming more operational

Rules increasingly affect take-back systems, recycled content, labelling, material choices and chemical restrictions



The priority is regulatory agility

Companies need market-by-market tracking, flexible packaging design and evidence-ready compliance data

Questions?

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