



**20
25**

Sustainability Report





Letter from the President

Sustainability is a choice that determines the future of the country and of businesses; it is not an option. At CONAI, we have known this for more than twenty-seven years: managing packaging materials correctly means generating economic, employment and environmental value, and doing so in a tangible way.

In 2024, our system generated over €3.8 billion in turnover, contributed €2 billion to GDP, and supported almost 25,000 jobs. These figures speak to the multiplier effect of a system that to date has made it possible to combine environmental protection with the growth of entire industrial supply chains.

Every euro of CONAI EPR Fee generated €3.60 in value for the national economy: a re-

sult that demonstrates how sustainability can also be extraordinarily productive.

And then there is the environmental aspect, which (of course) is never secondary: 76.7% of packaging waste placed on the market in 2024 was recycled. This figure speaks to efficiency, responsible choice, and real impact. Every tonne recycled reduces dependence on virgin resources, cuts CO₂ emissions and saves primary energy: in 2024 alone, recycled material saved an amount of energy equivalent to the domestic consumption of half of Italian households in a year.

The CONAI System therefore not only manages post-consumer packaging materials: it activates supply chains, enables strategic

sectors, creates jobs and saves natural resources. It is a unique role, which sets us as an international example of applied circular economy, capable of bringing together concrete results, vision and responsibility.

The numbers tell us how far we have come. Our commitment shows us the path we must follow every day: to continue to transform recycling into a real, measurable and shared opportunity for a more efficient and sustainable country.

Ignazio Capuano
CONAI President



Greeting from the General Manager

There are moments when numbers cease to be cold facts and become stories. The 2025 Sustainability Report is one such moment: every figure, every indicator is a tangible sign of a commitment that transcends the boundaries of the consortium to speak to the entire country.

This year in Urbino, at the Festival of Cultural Journalism, I once again awarded young journalists who have succeeded in translating sustainability into stories. The CONAI Phoenix Award for Young Environmental Journalism 2025 has shone a spotlight on stories of passion and expertise: journalism that does not merely inform, but invites us to look at the world with new eyes – in an edition of the Festival that gently reminded us that su-

stainability is also a matter of language, style and intuition. For it is not measured solely in tonnes recycled or materials recovered; it is perceived in the details, in everyday choices, in the connections we decide to create. It is an ecosystem of decisions and responsibilities, where what was once waste becomes opportunity, where secondary materials become the first act of innovation.

This is also corroborated by recent studies on cooperative collection and recycling models: shared commitment produces value, not only for those who enact it, but for everyone who reaps the benefits.

Our 2025 Report aims to make the invisible visible – stories of materials, people and supply chains that intertwine, like a multi-layered motion picture. From Green Jobs courses and school projects to dialogue with local communities and awareness campaigns, the common thread is clear: sustainability is about experience and participation.

And if it seems that we are describing matters that are too complex and distant, I would like to reassure you: there's still room for a smile. Because when we want environmental culture

to truly reach everyone, a sense of light-heartedness a little lightness goes a long way. Like when you discover that a piece of plastic may have travelled more than an absent-minded tourist, or that a sheet of recycled paper has actually seen more offices than a career manager.

The game, if you will, is to transform the everyday into the extraordinary, with a constant and ever-present commitment.

Our journalism award, our work with students, the Report: it's all part of the same story. Every word and every choice can become action, innovation, example. That is what sustainability is: the ability to make visible what often escapes us, to transform responsibility into curiosity, and curiosity into awareness. May this new Sustainability Report therefore not be a book of numbers, but an invitation to participate, to imagine. After all, the future cannot be recycled: it is built day after day, choice after choice... and when needed, even with a touch of humour and poetry.

Simona Fontana
CONAI General Manager



Sustainability Report 2025

Compliance with the European framework: adoption of VSME Standards.

3 LEVELS OF REPORTING



National System



CONAI System



Organisation

A SINGLE DOCUMENT FOR ALL STAKEHOLDERS



Sustainability Report



Environmental Statement 2024–2027 pursuant to Regulation (EC) 1221/09 (EMAS) as amended

CERTIFIED REPORTING



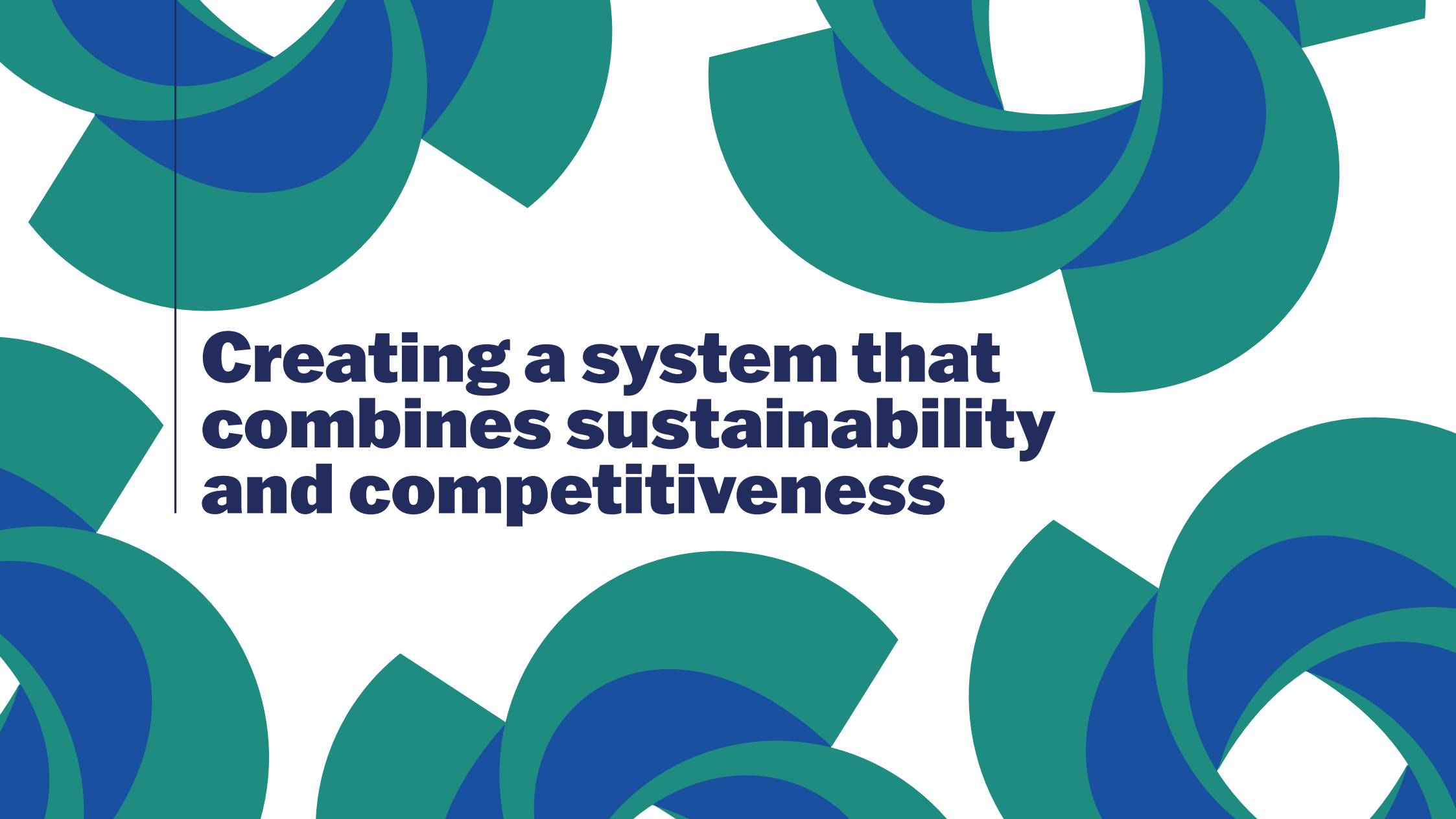
Compliant VSME Basic and Comprehensive Module



Technical assurance performed by RINA Services SpA



Validation of EMAS Environmental Statement performed by RINA Services SpA



**Creating a system that
combines sustainability
and competitiveness**



Competitive transition: Why act now?

Beyond the environmental objective.

The current transition phase is marked by increasing complexity: economic, technological and geopolitical dynamics are reshaping the relationship between sustainability, innovation and competitiveness at every level.

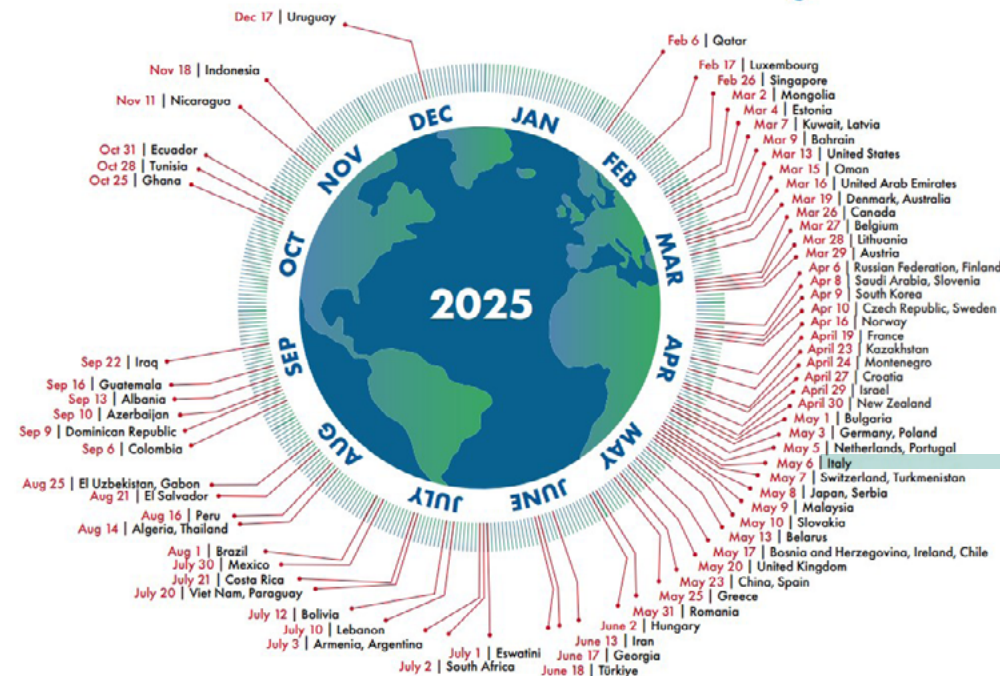
Earth Overshoot Day 2025 shows that production and consumption patterns remain unsustainable.

Although the costs of climate change have generated economic losses in the European Union estimated at €738 billion between 1980 and 2023, there remains a gap between scientific consensus and public perception, leading to a wait-and-see attitude or, worse, mistrust about the results that can actually be achieved.*

* Source: THEA Group.



COUNTRY OVERSHOOT DAYS 2025



Source: National Footprint and Biocapacity Accounts, preliminary 2024 Edition, York University, FoDaFo, Global Footprint Network, data.footprintnetwork.org.



Sustainability is the new competitive lever for businesses

Sustainability is establishing itself as a real competitive lever: it requires vision and long-term investment capacity. This is also confirmed by the CSEA study, which examined the relationship between different Extended Producer Responsibility schemes and value creation in the manufacturing and packaging sector.



Positive effect on equity performance

Companies subject to a cooperative EPR scheme with high recycling rates are rewarded by the market.

Signal of sustainability appreciated by investors

The national commitment to sustainability is recognised as a value.



High upfront costs for businesses

The negative coefficient highlights the economic impact of green policies in the short term.

Not all companies are able to sustain them

Sustainability policies require vision and long-term investment capacity.



Efficiency in long-term investments

Mitigates risk and increases share value over the long term.



The PNRR highlights the importance of sustainable investments: **a 0.5% increase in GDP in 2025**, while without the Plan, there would have been a decrease of 0.3%.*

* Source: Forecast Report – Investments to move Italy forward, Confindustria, 2025.



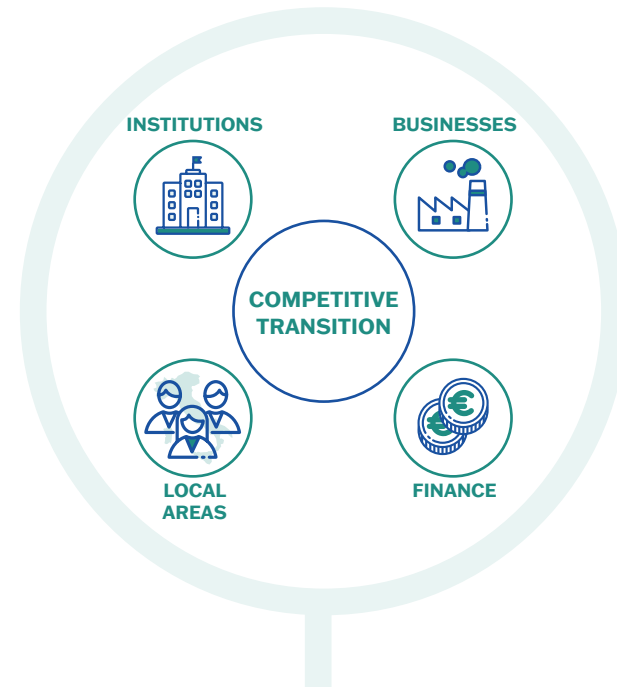
A collaborative and systemic approach makes the costs of change more sustainable

Europe has succeeded in decoupling economic growth from emissions, but today it faces two factors of uncertainty:

- divergent approaches among world powers;
- over-regulation on environmental issues.

In this scenario, it becomes more difficult for companies to invest in sustainability.

To respond to these challenges, CONAI, in partnership with TEHA Group, has promoted a dialogue between institutions, companies and financial operators. This has led to the definition of **seven strategic priorities**.



THE SEVEN STRATEGIC PRIORITIES according to institutions, businesses and financial operators:

① Clear, results-oriented rules to strengthen confidence and industrial planning.

② Ensure regulatory stability and focus on SMEs to avoid uncertainty and support investment.

③ Foster innovation and partnerships.

④ Integrate green and digital transition as a lever for sustainable growth.

⑤ Make finance simpler and more accessible for SMEs.

⑥ Promote training and knowledge as drivers of sustainability in supply chains.

⑦ Encourage the involvement of local administrations.



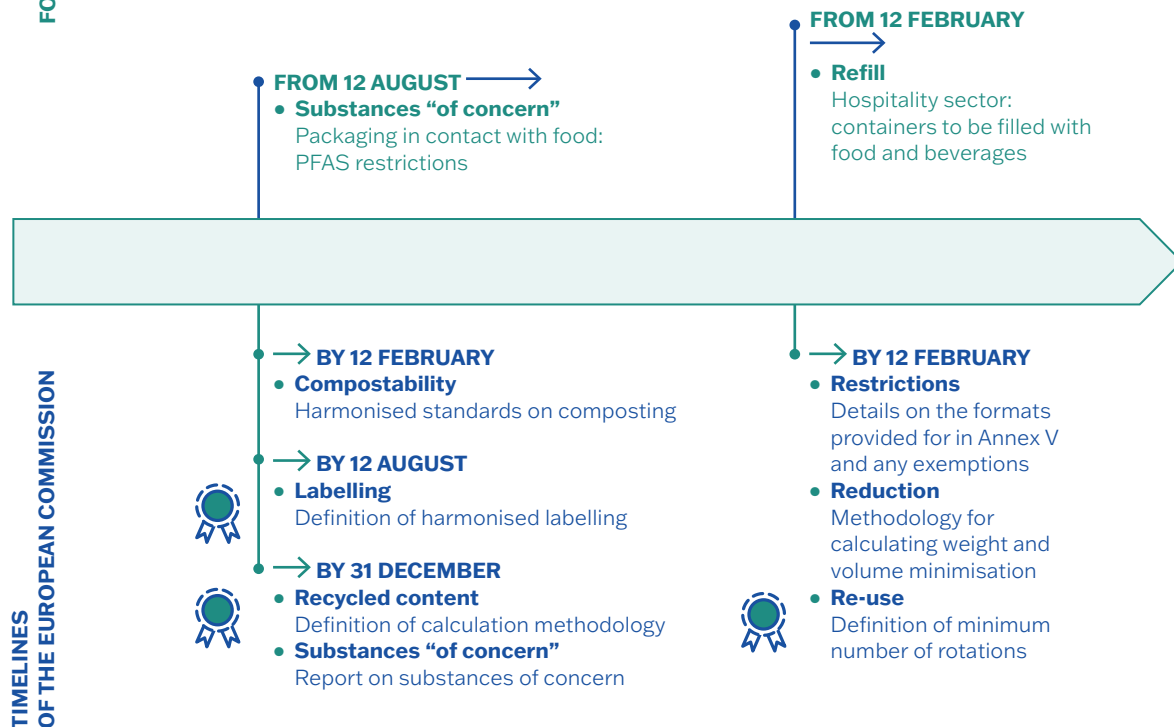
The competitive transition

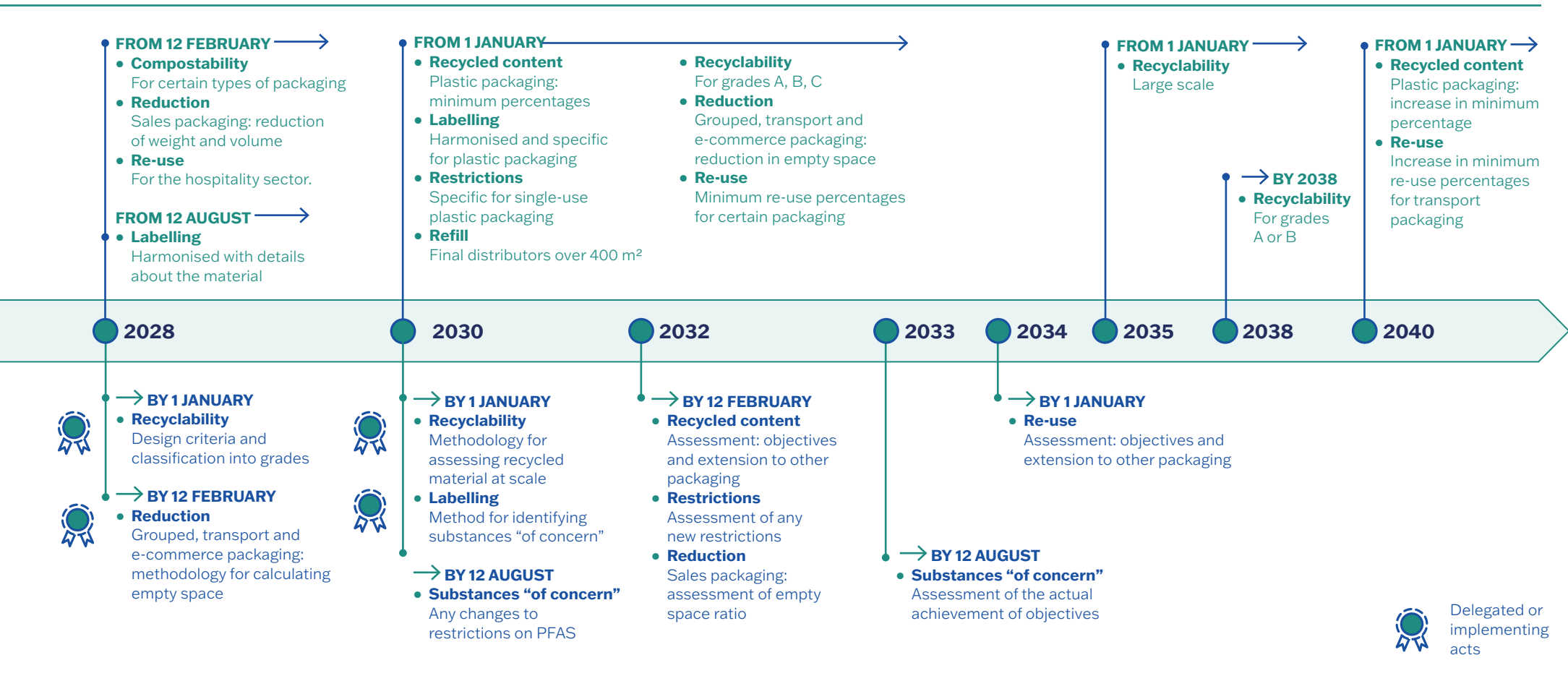
The new rules of Regulation 2025/40 (PPWR).

CONAI's commitment is set to be strengthened further in relation to the new EU Regulation 2025/40, for which the Consortium is preparing with its own methodologies and tools, in order to ensure effective and beneficial application for businesses, particularly SMEs, and for the entire National System.

OVERALL TIMELINE FOR COMPLIANCE WITH SUSTAINABILITY REQUIREMENTS – REGULATION 2025/40

DEADLINES
FOR BUSINESSES





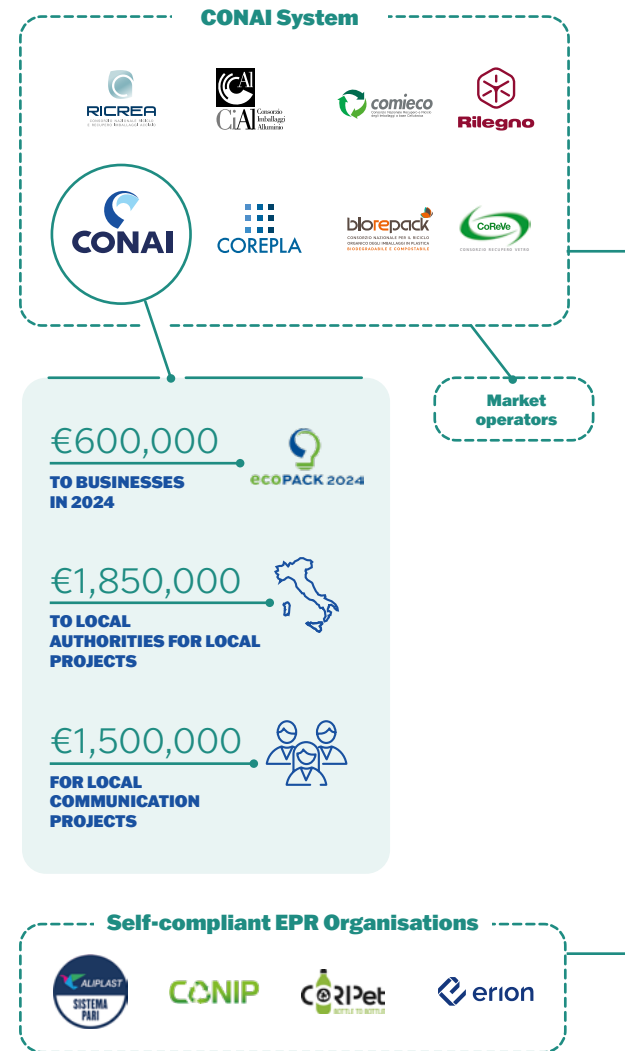
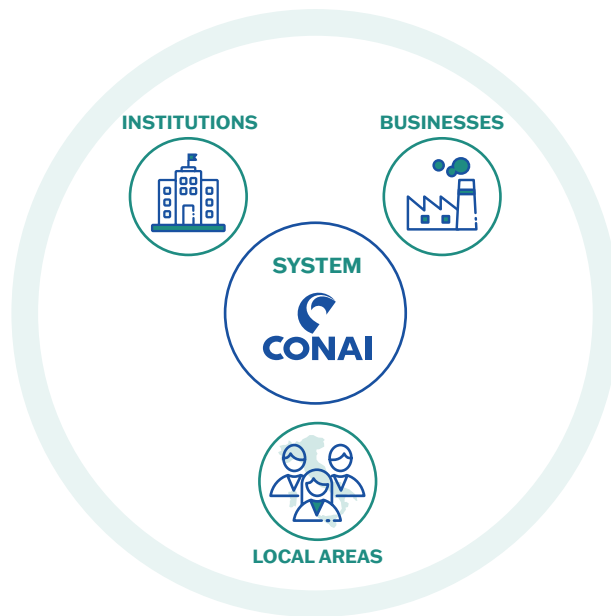


The systemic approach that creates value

The CONAI System is a collaborative governance model that has enabled economic supply chains while protecting the environment.

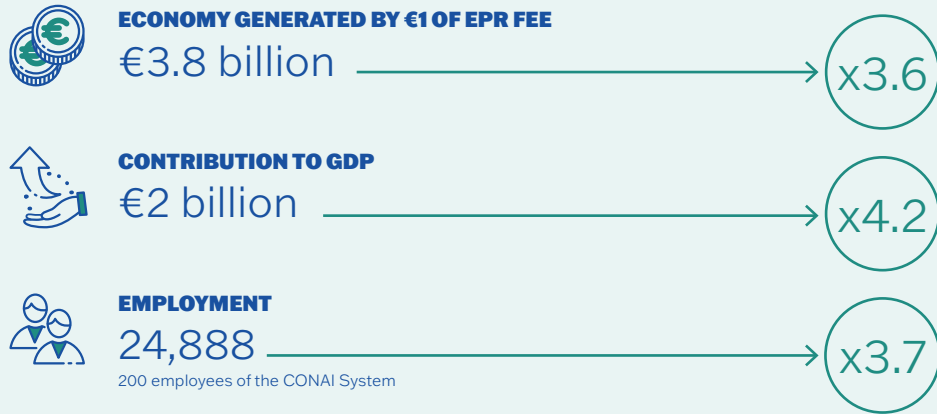
Only with a systemic approach is it possible to make the costs of change towards the competitive transition more sustainable.

CONAI is ready to work even more together with businesses to proactively address the challenges posed by the new EU Regulation 2025/40 (PPWR).



CONAI System

THE CONAI SYSTEM HAS A MULTIPLIER EFFECT ON THE ITALIAN SOCIAL AND ECONOMIC NETWORK.



DISTRIBUTES ECONOMIC VALUE TO:



CONAI System

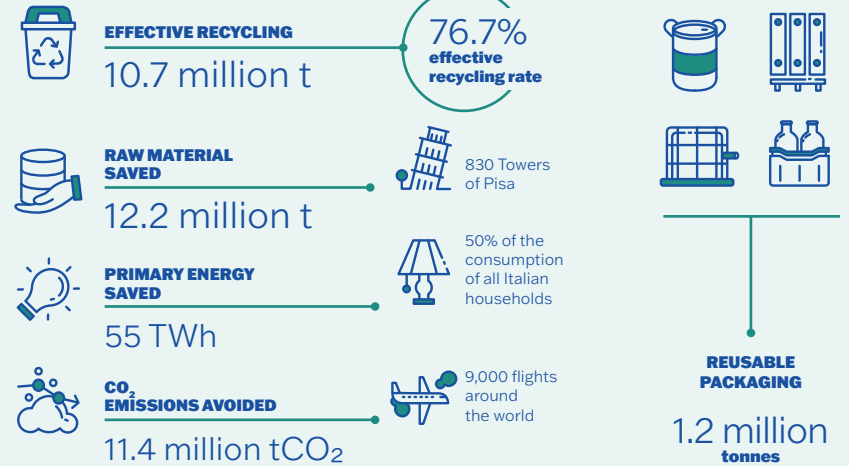


contributes to

Self-compliant EPR Organisations

contribute to

THE NATIONAL SYSTEM BENEFITS FROM:





Circular Economy Act: new opportunities for the circular economy

The push towards a circular economy has been reinforced by Ursula von der Leyen's policy guidelines for the 2024–2029 term. Among the main objectives of these guidelines are the decarbonisation of the European economy, the strengthening of innovation and sustainable competitiveness, and the adoption of regulations that promote the responsible use of resources.

The adoption of the *Circular Economy Act* is part of this framework, giving impetus to regulations capable of building an integrated market for secondary raw materials with a view to EU competitiveness and creating a single market for waste, thereby contributing to the EU's strategic autonomy.

Solutions and priorities according to the CONAI System for a stable and competitive recycling market



Minimum Environmental Criteria: A driving force to disseminate services and products with a high sustainability value throughout their entire life cycle.



End of waste status: Harmonisation and extension of EoW criteria to more materials to create a single European market for secondary raw material, reducing regulatory fragmentation and costs for businesses.



Certification systems to guarantee origin and carbon credits: Mechanisms to guarantee origin and carbon credits to improve the EPR Fee for secondary raw materials.



Environmental assessment and authorisations: Introduction of harmonised and accelerated procedures for environmental authorisations and assessments (VAS, VIA, AIA) of recycling plants, ensuring rapid turnaround times and high standards.



Sectoral incentives: Tax exemptions and fiscal incentives for the use of certified secondary raw materials.



Support for research: Allocation of structural funds to develop advanced recycling technologies and new applications for materials derived from separate collection.



Quality and efficiency of separate collection: Enhancing infrastructure and quality standards to ensure homogeneous flows and reduce impurities.

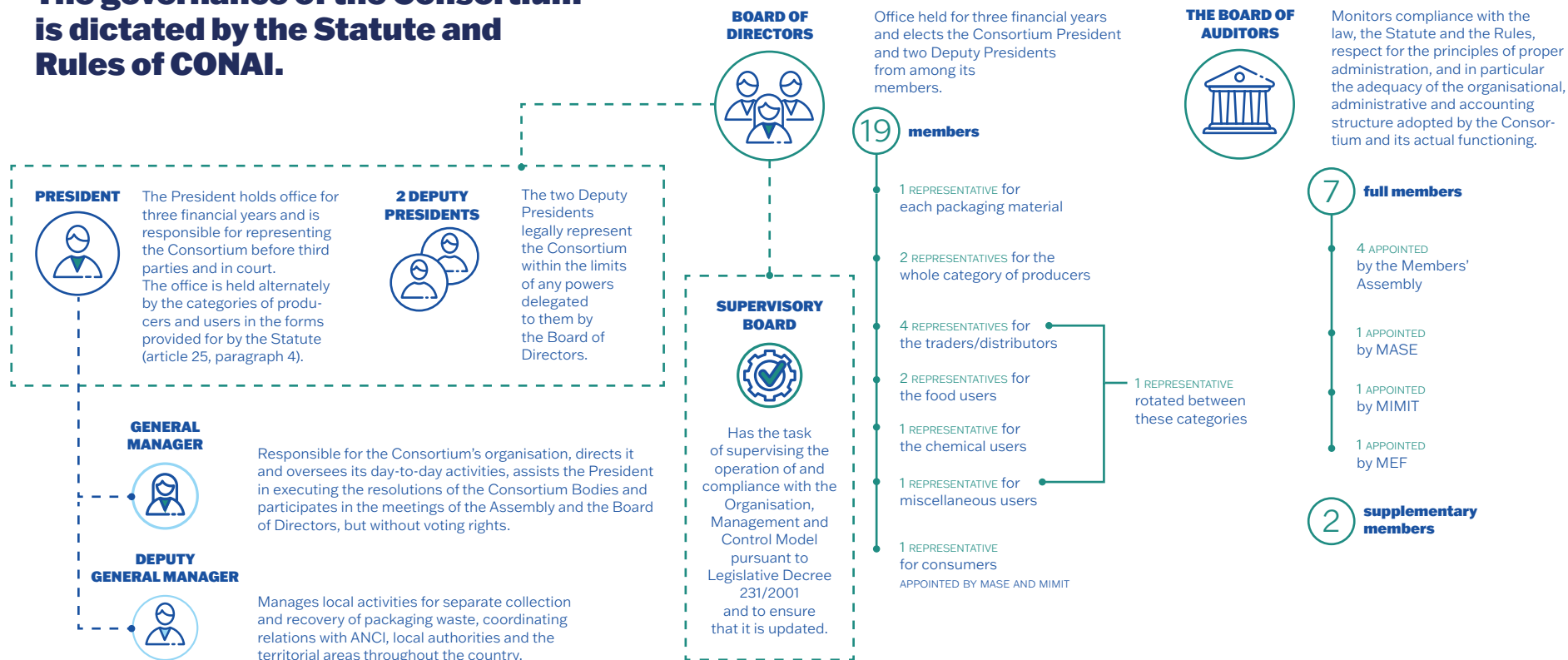


Value for organisations and businesses



The CONAI bodies

The governance of the Consortium is dictated by the Statute and Rules of CONAI.





Governance

Working groups and committees play an important role in facilitating dialogue between the various players in the system, with the task of addressing specific issues.

WORKING GROUP FOR “SIMPLIFICATION”

Coordination: Barbara Gatto (CNA).

Function: examine the classification of specific items as packaging or non-packaging, as well as evaluate and propose solutions to simplify the procedures relating to application, declaration or exemption of the CONAI EPR Fee.

WORKING GROUP FOR “FEE MODULATION”

Coordination: Domenico Rinaldini (Steel Supply Chain Producer).

Function: increase the ease of sorting and effective recyclability of packaging, encouraging more sustainable designs through technical support for the CONAI EPR Fee modulation mechanism.

WORKING GROUP FOR “PREVENTION”

Coordination: Roberta Rossi (Assolatte–Unionfood).

Function: promote eco-design and reduce the environmental impact of packaging through solutions developed in collaboration with businesses.

WORKING GROUP FOR “INTERNATIONAL AFFAIRS”

Coordination: Ignazio Capuano (CONAI President).

Function: define the guidelines and international activities of the CONAI EPR Organisation, with particular attention to coordinating work aimed at the adoption of EU legislation in areas of interest.

ANCI–CONAI COORDINATION COMMITTEE AND VERIFICATION COMMITTEE

ANCI–CONAI joint bodies for the governance of the Framework Agreement.

- **Coordination:** approve resources, local projects, calls for proposals, and training.
- **Verification:** monitoring of agreements, complaints, calculation of annual payments.

SCIENTIFIC STEERING COMMITTEE

Body supporting the CONAI Sustainability Report.

Components: C. Bellavite Pellegrini, L. Ponti, E. Ronchi, G. Tonelli.

Function: critically analyse, promote continuous improvement of the report and strengthen dialogue with institutions and stakeholders.



Businesses

Innovation that promotes sustainability

Companies face challenges related to the sustainability of their packaging on a daily basis. CONAI provides free tools through the **“Pensare Futuro”** project (“Thinking the Future”).



“Pensare Futuro”
project 2024



Design for Recycling

New Guidelines for Facilitating the Recycling of Steel Packaging.



CONAI EcoD Tool

Simplified LCA and packaging eco-design tool.

284

registered users since 2020

1,115

forms completed



DifferENTI

New information available on separate collection and selective collection.

“Pensare Futuro”
project **2024**



ECOPACK



E-PACK

1,476

enquiries handled

34,832

users



Labelling website

314

FAQs

82

good ideas

185

labelling specialists

CONAI CALL FOR ECO-DESIGN PROJECTS

CONAI rewards the most sustainable packaging solutions.



Cases presented

414

+ 11%
over 2023



Prize-winning companies

118

+ 9%
over 2023



Projects incentivised

248

+ 13%
over 2023

From the first to the eleventh
edition (2013–2024)



cases awarded

1,569



Total prize money
awarded

€4,700,000



Local areas

Local projects.



€1,850,000 distributed
to local authorities for
local projects.

CONAI PROJECTS 2024



Region	Main parties/municipalities	CONAI support activities 2024	Main objectives
NORTHERN ITALY			
Lombardy	Municipality of Legnano	Support for the management of plastic packaging waste from non-residential users.	Optimisation of the management of plastic packaging waste from non-residential users.
Veneto	Municipality of Verona	Communication campaign to support the launch of the new collection system.	Accompaniment and support for the implementation of separate collection initiatives.
Trentino-Alto Adige	Municipalities of Vallagarina and Altipiani Cimbri	Launch activities for the new home collection service.	Standardisation of the collection system in view of the subsequent introduction of the TARIP system (pay-as-you-throw).
Liguria	Municipality of Genoa	Design of separate collection services in the Albaro district of Genoa.	Identification of effective methods of separate collection in urban areas with small and micro roads.
Liguria	Municipality of Savona	Implementation of the industrial plan for services.	Introduction of the new collection system, predominantly door-to-door.
Emilia-Romagna	Region	Refinement of the pay-as-you-throw pricing model with the definition of standard regulations and updating of the simulation tool.	Development of the pay-as-you-throw pricing model for effective implementation in the area.



Region	Main parties/municipalities	CONAI support activities 2024	Main objectives
CENTRAL ITALY			
Tuscany	Municipality of Pisa, University	Design and optimisation of university waste collection.	Efficient technical/organisational model for waste management.
Abruzzo	Abruzzo Region	Drafting of a Local Plan for integrated municipal waste management services.	Definition of organisational and operational procedures and timelines for a more effective model for separate collection objectives.
Lazio	Rome Capital	Sharing of separate collection model in a municipality.	Increase in quantity and quality of separate collection.
Lazio	SAF Frosinone	Technical, economic and management feasibility study.	Joint waste management and identification of a single operator.
SOUTHERN ITALY AND ISLANDS			
Puglia	Region, AGER, ANCI, Municipalities of Bari, Foggia, Lecce, ARO BA4, ARO TA2	● Waste Traceability System support ● Door-to-door extension ● Start-up and communication ● TARIP (pay-as-you-throw system) ● PNRR (National Recovery and Resilience Plan)	● Improved quantity/quality of separate collection ● TARIP (pay-as-you-throw system) ● Traceability
Campania	Local Entity and District Sub-Area, Municipalities of Benevento, Salerno, Naples, Battipaglia, Fisciano/UNISA, Nocera Inferiore, Caserta Local Entity, Benevento Local Entity	● Plan updates ● TARIP (pay-as-you-throw) studies ● Communication campaigns ● PNRR (National Recovery and Resilience Plan)	● Separate collection 65–85%, TARIP (pay-as-you-throw) ● Consolidation of associated management ● Drafting of RUS Guidelines (Network of Sustainable Universities)
Calabria	Region, ARPACAL (Calabria Regional Environmental Protection Agency), Municipalities of Crotone and Catanzaro	● Administration training ● Start-up and communication of PAP (positive action plan) ● New service plans ● PNRR (National Recovery and Resilience Plan)	Strengthening of separate collection and traceability.
Sicily	Region, SRR ATO4, Municipalities of Palermo, Catania, Messina, Syracuse, Noto, Ragusa, Misterbianco, San Giovanni la Punta, Mazara del Vallo, Ribera	● Plan updates ● TARIP (pay-as-you-throw system) ● Start-up and communication ● Incentive mechanisms ● “Sicilia Munnizza Free” project ● PNRR (National Recovery and Resilience Plan)	● Increased quantity/quality of separate collection ● TARIP (pay-as-you-throw system) ● Good practices and littering prevention ● Implementation of RUS Guidelines (Network of Sustainable Universities)



ANCI-CONAI Call for Local Communication Projects

Promoting local information on separate collection of packaging waste.



€1,500,000 allocated in Local Communication Projects.

2023–2024 EDITION

- **45 projects**
approved for co-funding
- **7 million inhabitants**
involved
- **134 projects**
presented

30
NORTH

32
CENTRE

18
SOUTH

2024–2025 EDITION

- **49 projects**
approved for co-funding
- **More than 7 million inhabitants**
involved
- **100 projects**
presented

19
NORTH

25
CENTRE

56
SOUTH



Green Jobs and university education

CONAI and Packaging Material Consortia are engaged in projects dedicated to university education.

Higher Education Course on “Waste Management in the Circular Economy”

Inter-consortia project, with the contribution of Packaging Material Consortia and recycling firms

“**Green Jobs**” developed in collaboration with the Universities of Bergamo and Brescia and the High Institute for the Environment of the Catholic University.

- **68 young people** involved

CONAI partnership with ENEA for degree prizes

The second edition of the call for master's degree dissertations on circular economy and waste management has concluded.

- **€3,000** each, for **3 dissertations**

Scientific publication:

ENEA-CONAI Master Thesis Award 2023 and 2024. Proceedings of the selected theses includes the dissertations from the two editions and 40 scientific articles.



Training activities for businesses and associations

CONAI Academy Webinars

6 training sessions to explore the main consortium developments in terms of EPR Fee, ecodesign, green claims, etc.

Confindustria roadshow for local trade associations

20 webinars and 5 seminars in person at:

- Brindisi
- Catania
- Cagliari
- Ancona
- Pesaro
- Macerata
- Ascoli Piceno
- Salerno

on EPR Fee, labelling, MUD (Single Declaration Model), RENTRI (National Electronic Waste Traceability Register), TARI (municipal waste tax), etc.

Start-up project

1st edition of the **Start-up Award** with the Foundation for Sustainable Development.

- **3 award-winning start-ups** that have developed business ideas in the circular economy, in line with CONAI's objectives.



Training activities for public bodies and journalists

Training on the Framework Agreement

Topics studied:

- Framework Agreement and related Technical Annexes
- national and European legislation
- best practices for collection
- waste management

Tools:

- local training seminars for public administrations and companies within the sector;
- guided tours of intermediate and final recycling plants for public administration officials;
- experimental initiatives for secondary schools;
- national events on circular economy issues.



Journalists' Association seminars

Training sessions for members of the Journalists' Association with a seminar on ***“Recycling and circular economy: the Italian model setting the standard in Europe”***, organised by CONAI and serving as an opportunity to acquire compulsory training credits, continued as planned.

2 sessions:

- Bari (April 2024)
- Turin (June 2024)



Culture and language: CONAI Phoenix

The award dedicated to young journalists who have spoken about sustainability and environmental protection.



2023–2024 edition

“[...] In addition to practical initiatives, Tottenham’s commitment to the climate is also manifested through various formal actions, such as signing numerous memoranda and agreements with associations and institutions: for example, the club was one of the founding members of the 10:10 initiative, which called on individuals, companies, schools and other organisations to reduce their emissions by 10% in one year. Spurs also pledged to halve their carbon emissions by 2030 and become carbon neutral by 2040 by joining the United Nations’ Race to Zero campaign, which mobilised 449 cities, 21 regions, 992 companies, 38 major global investors and 505 universities. [...]”



2024–2025 edition

“[...] The Swiss company ClearSpace has also been selected by the European Space Agency (ESA) for another mission to remove an object from orbit. The British subsidiary, on the other hand, is working with the UK Space Agency on a first mission in 2026 involving two British satellites, each the size of a washing machine: ‘The mission will be to approach and hook up two defunct satellites with a system called Claw, four tentacles like spider legs that will capture the clients and push them into the atmosphere where they will be completely destroyed upon re-entry. Nothing remains and it is an absolutely safe procedure,’ says the aerospace engineer, who holds a degree and doctorate from the University of Padua. [...]”

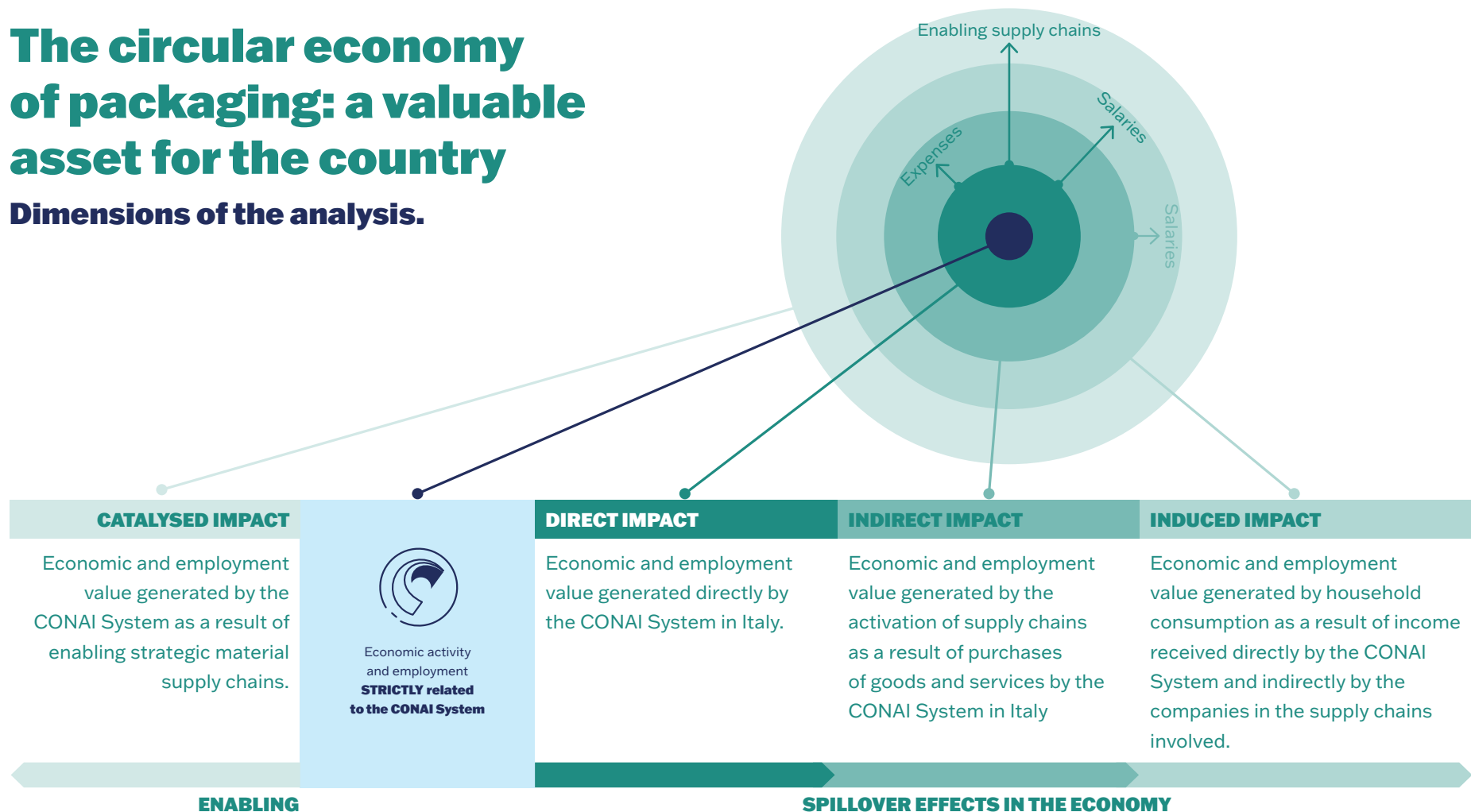


Economic and environmental benefits



The circular economy of packaging: a valuable asset for the country

Dimensions of the analysis.



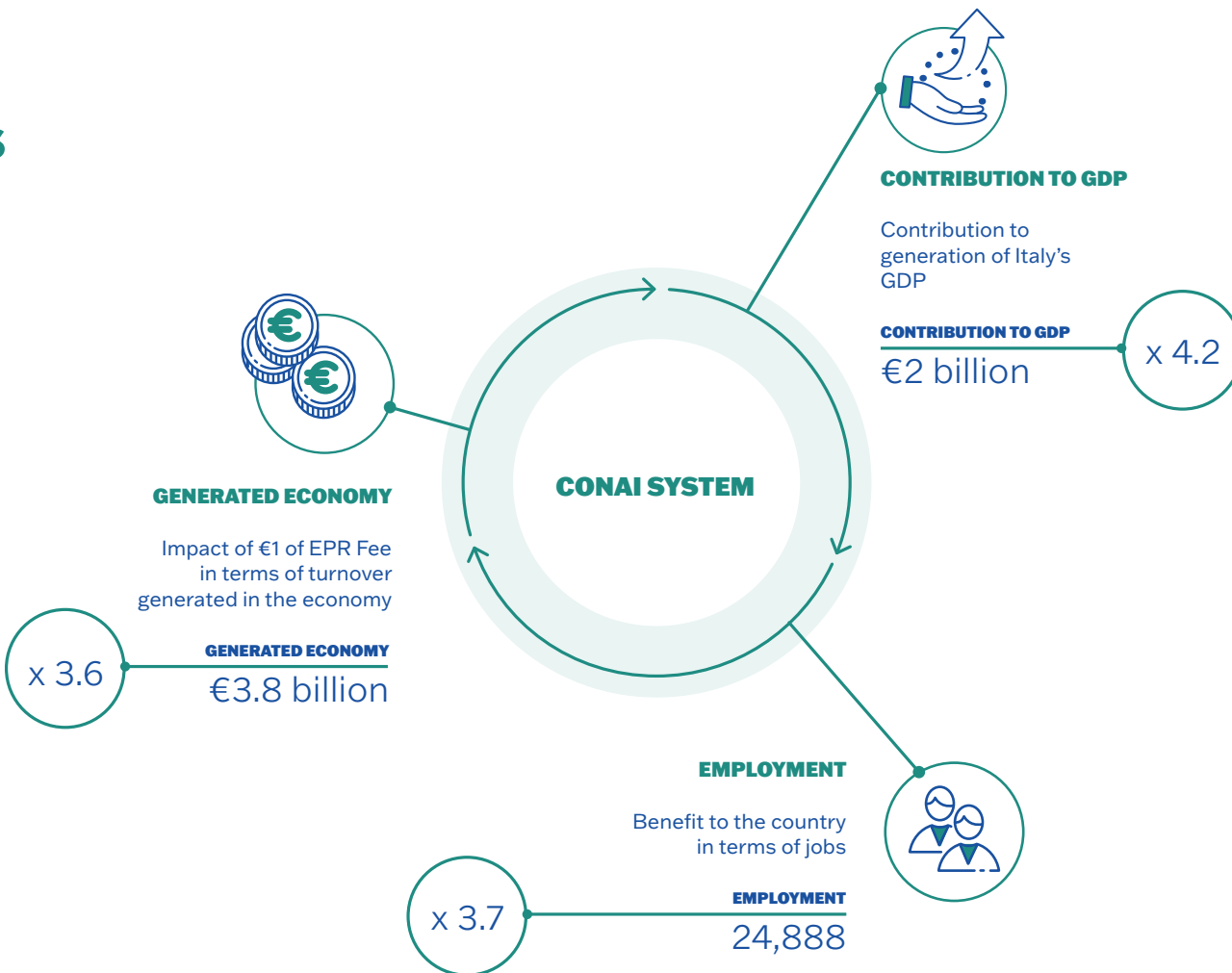


Economic impacts of the system

Analysis indicators.

The methodological approach formulated by TEHA Group for calculating the direct, indirect and induced impacts involves the use of **input-output models**, based on ISTAT data, adjusted to measure **sectoral interdependencies** and calculate the economic value created by the various activities of the CONAI System.

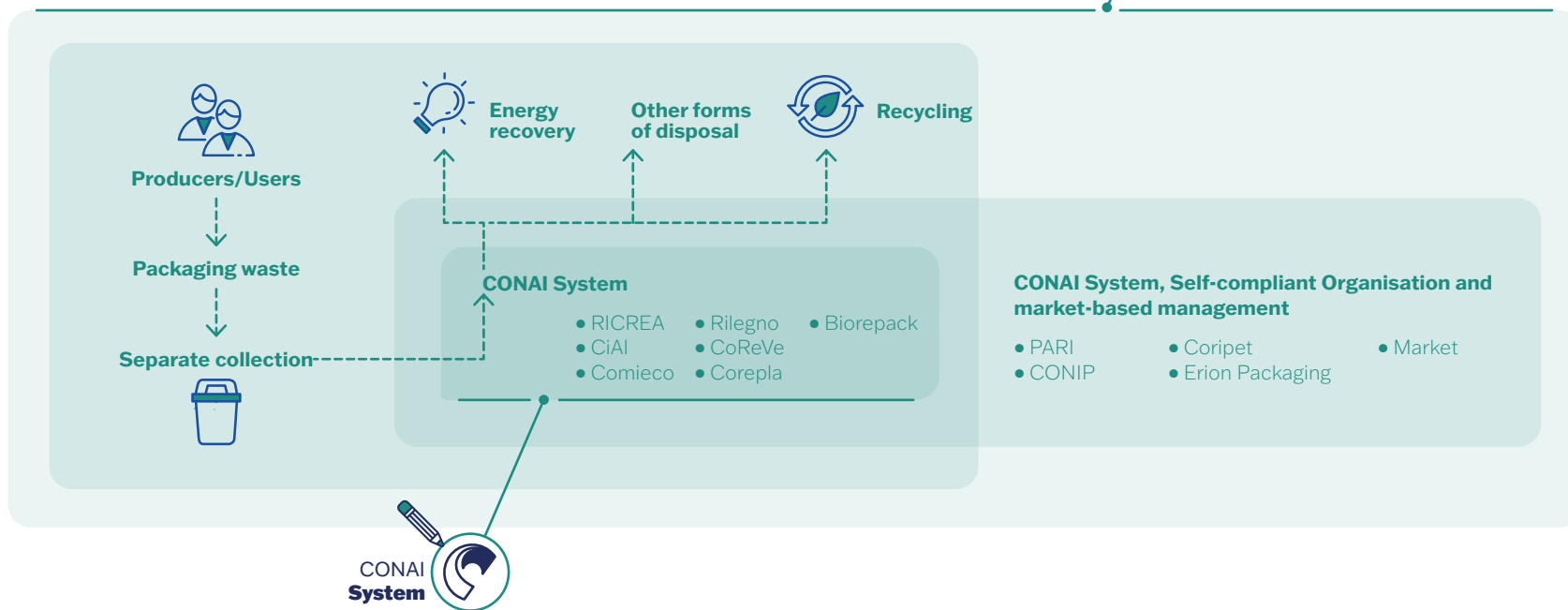
This methodological framework makes it possible to calculate and measure the **contribution** to the **national social and economic network**, in terms of generated economy, GDP and employment, by reconstructing the various **economic components created** both upstream and downstream.





The environmental benefits of the circular economy of packaging

The **CONAI Life Cycle Costing Tool (LCC)** allows the costs/benefits to be quantified for the entire sector.





The contribution of firms to protecting material

Primary material savings.

Primary material savings from recycling are the amount of primary material that is not used to make packaging or other products due to the use of recycled packaging.



In 27 years
MATERIALS SAVED
DUE TO THE USE OF
SECONDARY RAW MATERIAL
221 million tonnes



in 2024 alone
MATERIALS SAVED
DUE TO THE USE OF
SECONDARY RAW
MATERIAL obtained
from waste from various
supply chains

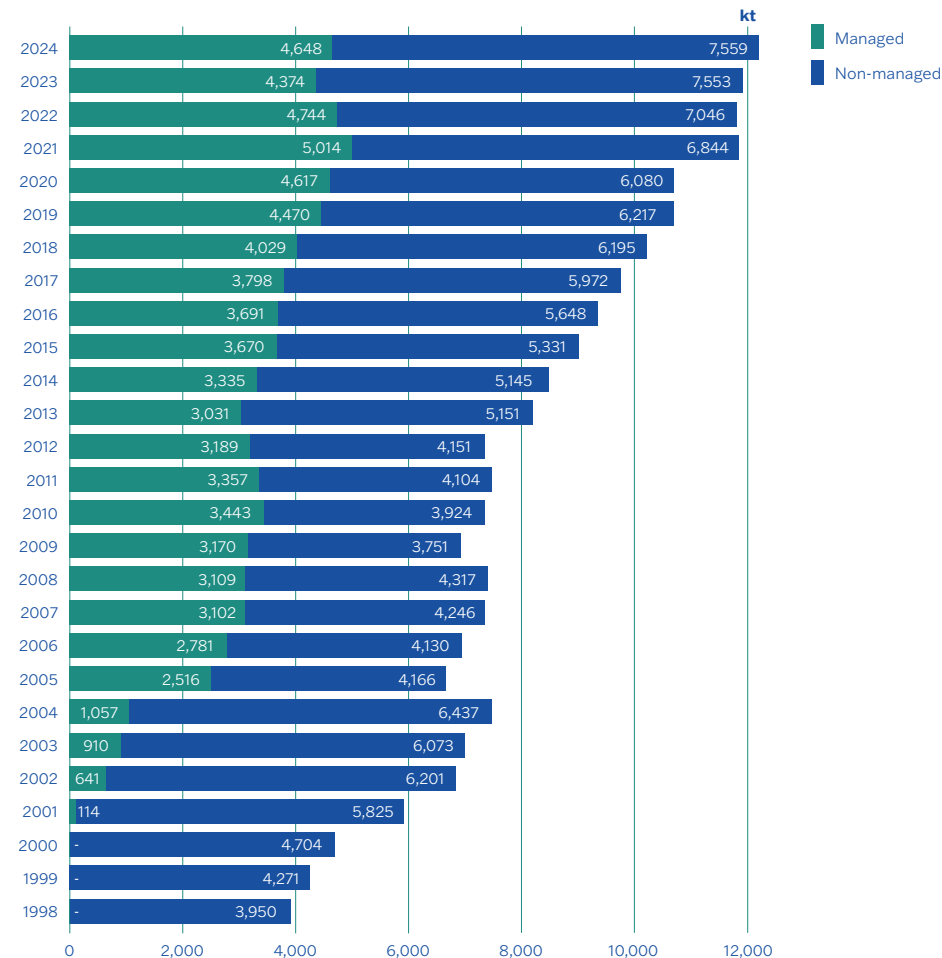


= the weight of 830 Towers of Pisa*

* Estimated weight of the Tower of Pisa is 14,700 t

Source: Data generated by CONAI Research Centre from LCC Tool data in partnership with Studio Fieschi.

PRIMARY MATERIAL SAVINGS





The contribution of businesses to managing energy resources

Primary energy savings from recycling.

Primary energy savings from recycling are the amount of energy generated from fossil sources that would be required to produce all the primary material saved.

As of 2023, the figure has been further refined by introducing into the calculation the primary energy consumption related to the preparation for recycling and transport of packaging waste along the supply chain.



in 2024 alone
ENERGY SAVINGS
GENERATED
55 TWh

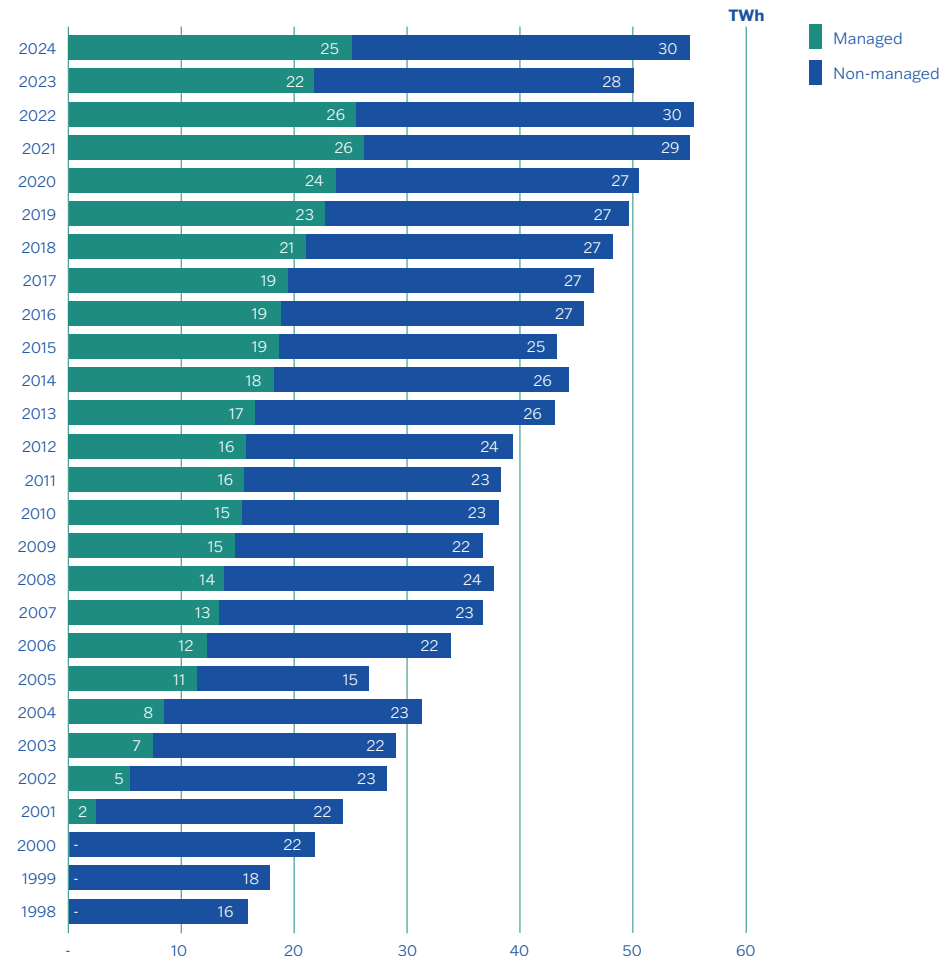


= electricity consumption of approx. half of Italian households*

* The estimated consumption deriving from fossil fuels per household is 2.51 MWh/family per year.

Source: Data generated by CONAI Research Centre from LCC Tool data in partnership with Studio Fieschi.

PRIMARY ENERGY SAVED

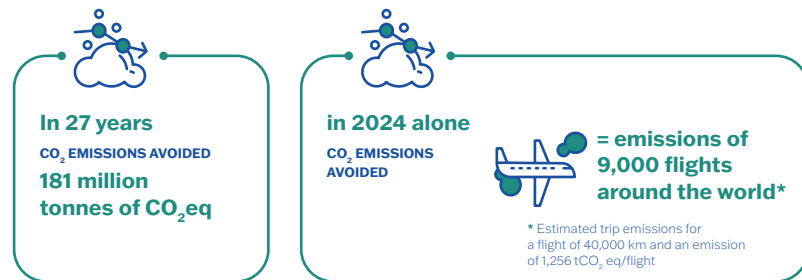




The sector's contribution to combating climate change

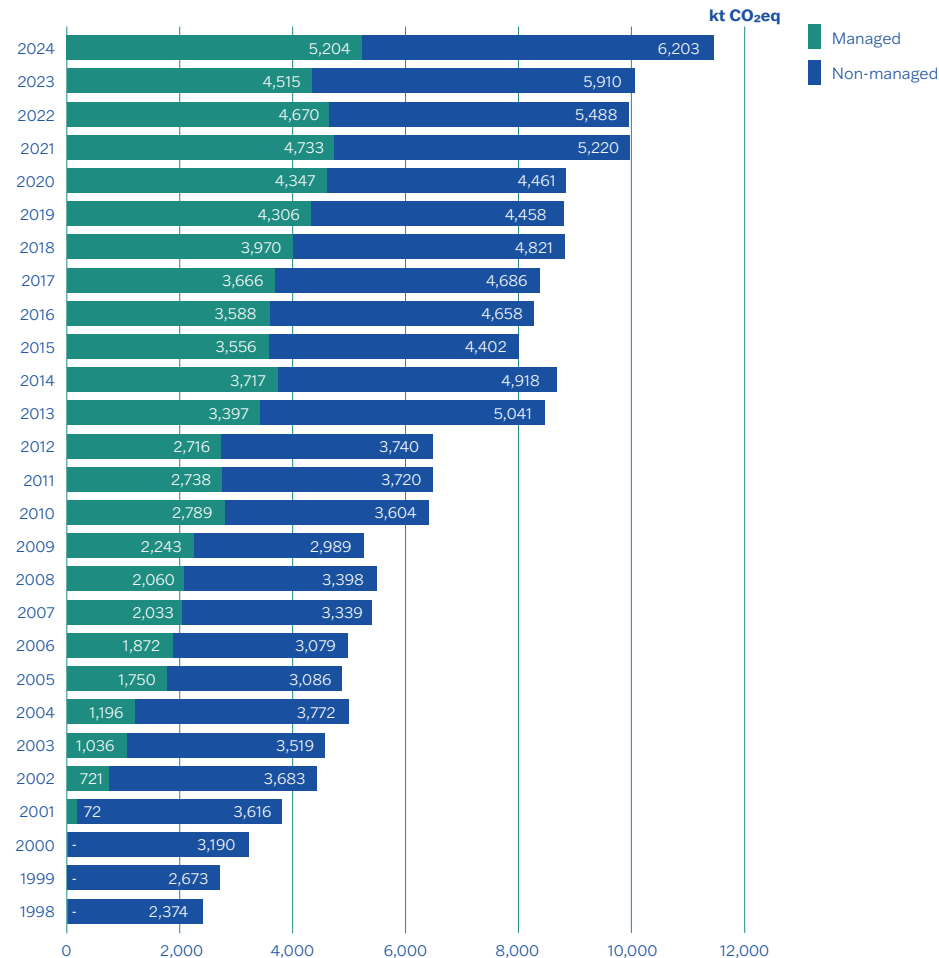
Avoided production of CO₂eq from recycling.

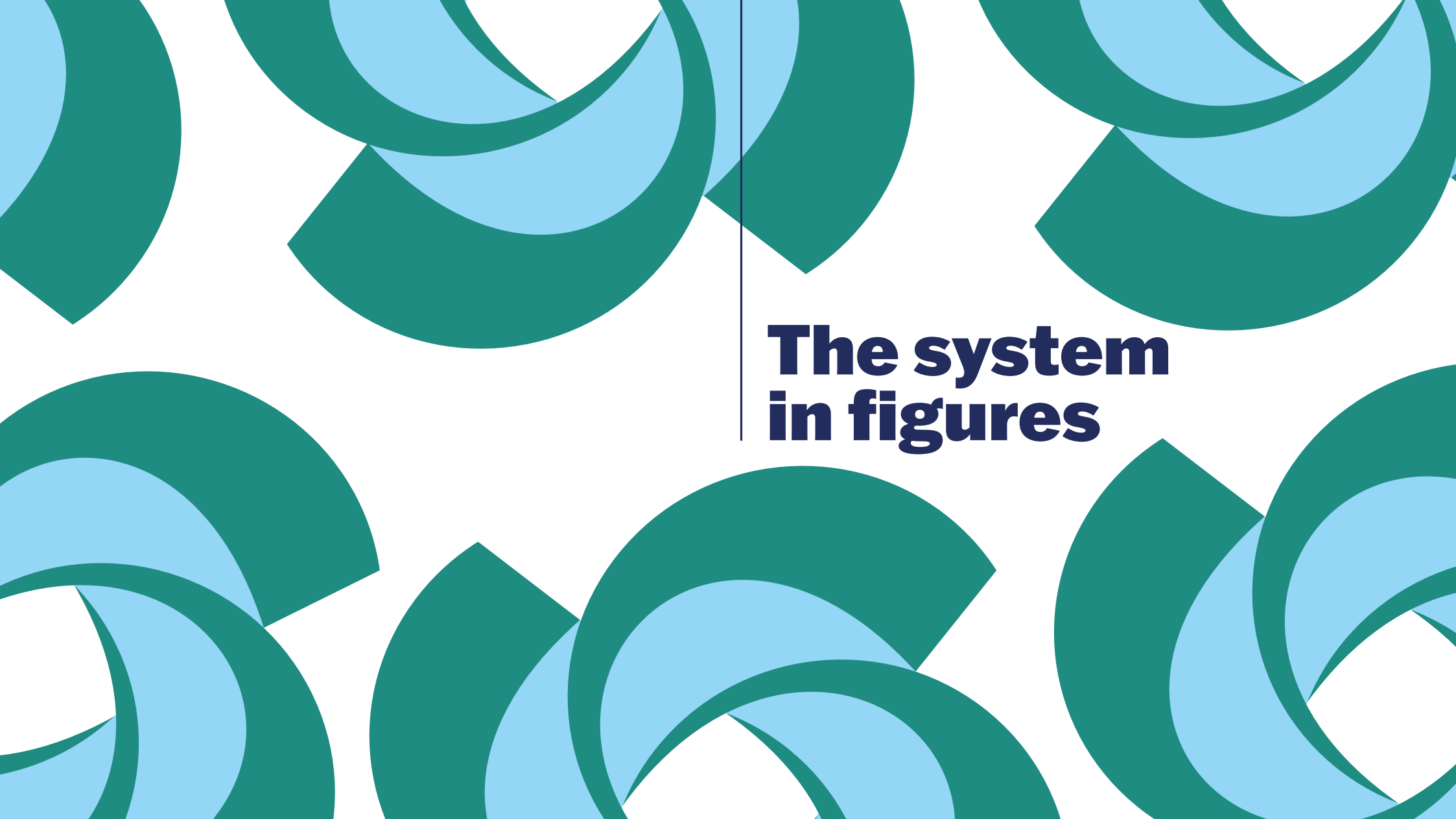
The avoided CO₂ production through recycling is achieved by subtracting the emissions avoided due to the non-production of new materials from the emissions generated by transporting and treating packaging waste.



Source: Data generated by CONAI Research Centre from LCC Tool data in partnership with Studio Fieschi.

AVOIDED PRODUCTION OF CO₂ FROM RECYCLING





The system in figures



Objectives, documentation and reporting

National Programme for Data Validation: transparency in reporting data provided to institutions.



On 20 June 2023, the UNI 11914 standard was published, entitled *Management System for Determining the Quantities of Packaging Waste Produced, Recycled and Recovered with Energy Production*.

It defines a standard process for verifying the procedures for determining market placement, recycling and recovery data for packaging waste from EPR systems, and thus guarantees the highest quality of the data provided in conformity with current legislation.

As of 2024, all institutional documentation of the National Programme for Data Validation (PNVD) is drafted in accordance with the new UNI 11914 standard. In addition, the PNDV has been expanded with the introduction of an additional, optional activity for members: the “Focus Area”. This specific assessment concentrates on a regulatory change or a topic of particular relevance, which will be monitored regularly with the aim of fostering continuous improvement.

2024 ACTIVITIES

- **ON-SITE checks** (documentary) 9
- **WITNESS checks** (in the field) 11
- **FOCUS AREA** 7

2025 ACTIVITIES

- **ON-SITE checks** (documentary) 9
- **WITNESS checks** (in the field) 12



Packaging streams in Italy

Placement on the market.

Includes the corrections introduced by Commission Implementing Decision (EU) 2019/665 of 17 April 2019, amending Decision 2005/270/EC of 22 March 2005.

PACKAGING PLACED ON THE MARKET

Material	2023 consolidated	2024	Annual change
	T	T	%
Steel	484,229	504,149	4.1
Aluminium	84,300	91,500	8.5
Paper	5,024,414	4,984,109	-0.8
Wood	3,332,669	3,444,682	3.4
Plastic and bioplastic	2,289,950	2,308,769	0.8
of which traditional plastic	2,212,028	2,226,523	0.7
of which compostable plastic	77,923	82,246	5.5
Glass	2,642,425	2,618,750	-0.9
Total	13,857,988	13,951,959	0.7



Steel

Increased quantities of “drums”, “raw material for packaging” and from tank regeneration.



Plastic

Slight increase with consumption of polymers, mainly PE, PET and PP.



Aluminium

Increase almost entirely attributable to the new “composite” corrective measure (EU Decision 2019/655).



Biodegradable and compostable plastic

Increase in compostable bioplastic packaging.



Paper

After the highs reached in 2021 and 2022, the quantities have returned to pre-Covid levels.



Glass

Slight decrease confirmed, in line with the quantities of glass packaging subject to the CONAI EPR Fee.



Wood

Increase following the significant rebound in 2022.

Source: Data generated by CONAI Research Centre based on institutional documents by Packaging Material Consortia and Self-compliant EPR Organisations (Management Report and Strategic Prevention Plans, May 2025).



Packaging streams in Italy

Placement on the market.

Packaging placed on the market by supply chains together with the Self-compliant EPR Organisations

The overall figure for placement on the market of the supply chain includes the assessments provided in the official documents sent to CONAI by the Packaging Material Consortia and Self-compliant EPR Organisations.

Source: Data generated by CONAI Research Centre based on institutional documents by Packaging Material Consortia and Self-compliant EPR Organisations (Management Report and Strategic Prevention Plans, May 2025).



	2023 consolidated	2024
PAPER	T	T
Comieco	5,017,210	4,965,618
Erion Packaging	7,204	18,491
Total paper	5,024,414	4,984,109



WOOD	T	T
Rilegno	3,330,784	3,440,202
Erion Packaging	1,885	4,480
Total wood	3,332,669	3,444,682



TRADITIONAL PLASTIC	T	T
Corepla	1,872,672	1,878,121
CONIP crates	73,061	75,492
CONIP pallets	64	-
PARI	13,075	13,783
Coripet	249,371	253,361
Erion Packaging	3,784	5,766



COMPOSTABLE BIOPLASTIC	T	T
Biorepack	77,923	82,246
Total plastic and compostable bioplastic	2,289,950	2,308,769



Packaging streams in Italy

Re-use.

Reusable packaging benefiting from CONAI incentive procedures

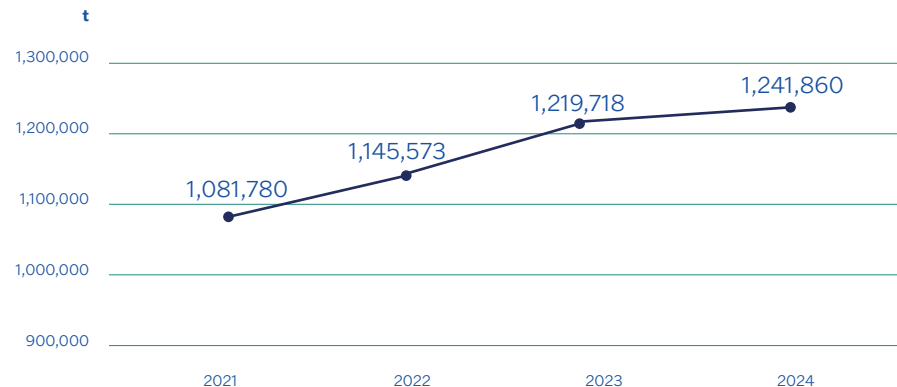
CONAI devotes special attention to packaging designed for multi-year use. Since 2012, it has introduced incentives and simplified contributions for reusable packaging that is continuously being adapted.

In 2024, the quantities of packaging reused through CONAI's incentive procedures confirm the upward trend already seen in 2021.

REUSABLE PACKAGING



The upward trend in reusable packaging continues: **more than 1.2 million tonnes** declared to CONAI.

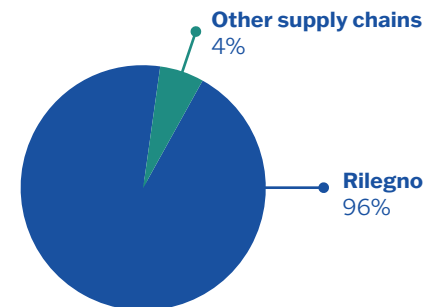


Source: CONAI, General Programme for the Prevention and Management of Packaging and Packaging Waste 2024.

EFFECT OF PACKAGING CHAINS WITH INCENTIVE PROCEDURES IN 2024

96% of the reusable packaging declared to CONAI through incentive procedures belongs to the wood packaging supply chain, especially pallets, which are ideally suited to re-use or repair in industrial settings.

Source: Data generated by CONAI.





Packaging streams in Italy

Collection.

ANCI-CONAI DELIVERIES

Packaging Material Consortia	Final results 2024		Delta vs 2023
	KT	KG/PERSON	%
RICREA	129.0	2.49	-10.7
CiAI	17.17	0.37	1.4
Comieco	1,587	28.04	4.6
Rilegno	n/a	n/a	n/a
Biorepack	52.36	1.04	19.4
Corepla	1,335 *	23.31	4.0
CoReVe	1,737	33.86	4.64
Total	4,857.45		4.10

* Quantities also include 5,424 tonnes of collection pertaining to the CONIP consortium and 253 tonnes from Corepla selective collection.

Source: Packaging Material Consortia.

The total amount delivered to Packaging Material Consortia and Self-compliant EPR Organisations under agreements with ANCI was 5,043.60 ktonnes in 2024 (+4%).



ANCI-CONAI
DELIVERIES

4,857 kt

+ 4.10%
over 2023



PAYMENTS MADE
TO MUNICIPALITIES

€789 million

€676 M
in 2023

In addition to the quantities managed directly by the Packaging Material Consortia, there are those collected by the Self-compliant EPR Organisations from the public sector. For the plastics supply chain, **the volumes managed by Coripet, based on its share, total 193,357 tonnes (of which 7,208 tonnes from selective collection).**



Packaging streams in Italy

Recycling.

EFFECTIVE RECYCLING

Material	2023 consolidated	2024	Annual change
	T	T	%
Steel	431,048	435,539	1.0
Aluminium	59,300	62,400	5.2
Paper	4,654,965	4,605,294	-1.1
Wood	2,164,246	2,314,294	6.9
Plastic and bioplastic	1,123,200	1,178,935	5.0
<i>of which traditional plastic</i>	1,079,704	1,131,424	4.8
<i>of which compostable plastic</i>	43,496	47,511	9.2
Glass	2,045,768	2,102,979	2.8
Total	10,478,527	10,699,441	2.1



EFFECTIVE RECYCLING

10.70 million t

+ 2.1%
over 2023



EFFECTIVE RECYCLING RATE

76.7%

+1.07%
over 2023
percentage
points

Source: Data generated by CONAI Research Centre based on institutional documents by Packaging Material Consortia and Self-compliant EPR Organisations (Management Report and Strategic Prevention Plans – May 2025).



Packaging streams in Italy

Recycling.

Packaging recycled by supply chains together with the Self-compliant EPR Organisations

The overall figure for recycling of the supply chain includes the assessments provided in the official documents sent to CONAI by the Packaging Material Consortia and Self-compliant EPR Organisations.

* Further inter-consortium studies are underway with the aim of improving supply chain reporting.

Source: Data generated by CONAI Research Centre based on institutional documents by Packaging Material Consortia and Self-compliant EPR Organisations (Management Report and Strategic Prevention Plans, May 2025).



	2023 consolidated	2024
PAPER *	T	T
Comieco	4,648,692	4,594,128
Erion Packaging	6,273	11,166
Total paper	4,654,965	4,605,294



WOOD *	T	T
Rilegno	2,162,361	2,309,814
Erion Packaging	1,885	4,480
Total wood	2,164,246	2,314,294



TRADITIONAL PLASTIC	T	T
Corepla	882,352	927,004
CONIP crates	54,711	55,076
CONIP pallets	310	227
PARI	13,075	13,197
Coripet	123,368	126,254
Coripet from selective collection	4,285	5,766
Erion Packaging	1,603	3,900
COMPOSTABLE BIOPLASTIC	T	T
Biorepack	43,496	47,511
Total plastic and compostable bioplastic	1,123,200	1,178,935





Packaging streams in Italy

Industrial and commercial packaging.

The CONAI system offers a second-level service for industrial and commercial packaging waste – purely as a guarantee – starting with the **Rilegno Consortium**, which is most concerned with packaging that falls into this category.

* In addition to quantities returned to the market in accordance with the codified specifications and used in controlled circuits, this figure includes all other items that are subject to CONAI incentive procedures.

Source: Abstract, General Programme for the Prevention and Management of Packaging and Packaging Waste 2025.

Consortium	Re-use	Regeneration of secondary and tertiary packaging	Recycling of secondary and tertiary packaging	Assimilation
RICREA		• Drums and tanks: 35 kt	• Non-hazardous non-reusable: 135 kt • Strapping: 28 kt	
COMIECO			• Collection at business premises and other small and medium-sized businesses (non-residential users) • Network of 118 platforms	• Cardboard boxes from residential users in combined separate collection and from non-residential users in selective separate collection
RILEGNO	Weight abatement on EPR Fee for reusable packaging: 984 kt* benefited from EPR Fee reduction	• Recovered tank bases: 9.1 kt for 27 plants • Pallet reprocessing project: 123 kt of regenerated pallets from 65 EPR Organisation members	• Network of 394 platforms: 1,756 kt	
COREPLA		• Drums and tanks (PIFU): 22 kt for 28 plants	• PEPS – expanded polystyrene packaging recycling platform: 11.5 kt for 33 plants • Network of 55 platforms in partnership with CARPI consortium affiliated plants: 190 kt	• Film: 131 kt



Packaging streams in Italy

Recycling.

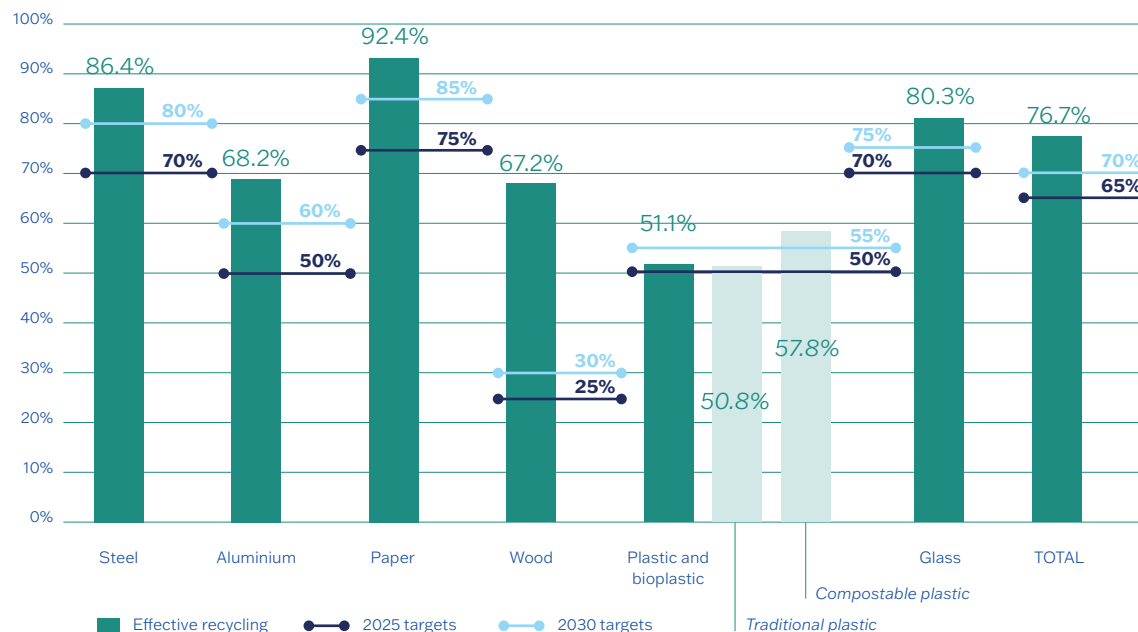
According to the European Commission's specific report of 8 January 2023, Italy is not one of the countries at risk in terms of meeting recycling targets.

In light of the supply chain targets set for 2030, uncertainty remains for the plastic packaging sector, exacerbated by the difficulties facing the recycling industry at European level.

Source: Data generated by CONAI Research Centre based on institutional documents by Packaging Material Consortia and Self-compliant EPR Organisations (Management Report and Strategic Prevention Plans – May 2025).

2025 recycling target already exceeded for all supply chains.

ACHIEVED RESULTS COMPARED WITH 2025 AND 2030 TARGETS





Packaging streams in Italy

Total recovery.

* The 2024 figure is preliminary.

PACKAGING WASTE SENT TO RECYCLING AND ENERGY RECOVERY IN ITALY FROM 1998 TO 2024*

Source: Packaging waste by waste management operations, Eurostat.





The CONAI System: the market-support role of the CONAI EPR Organisation

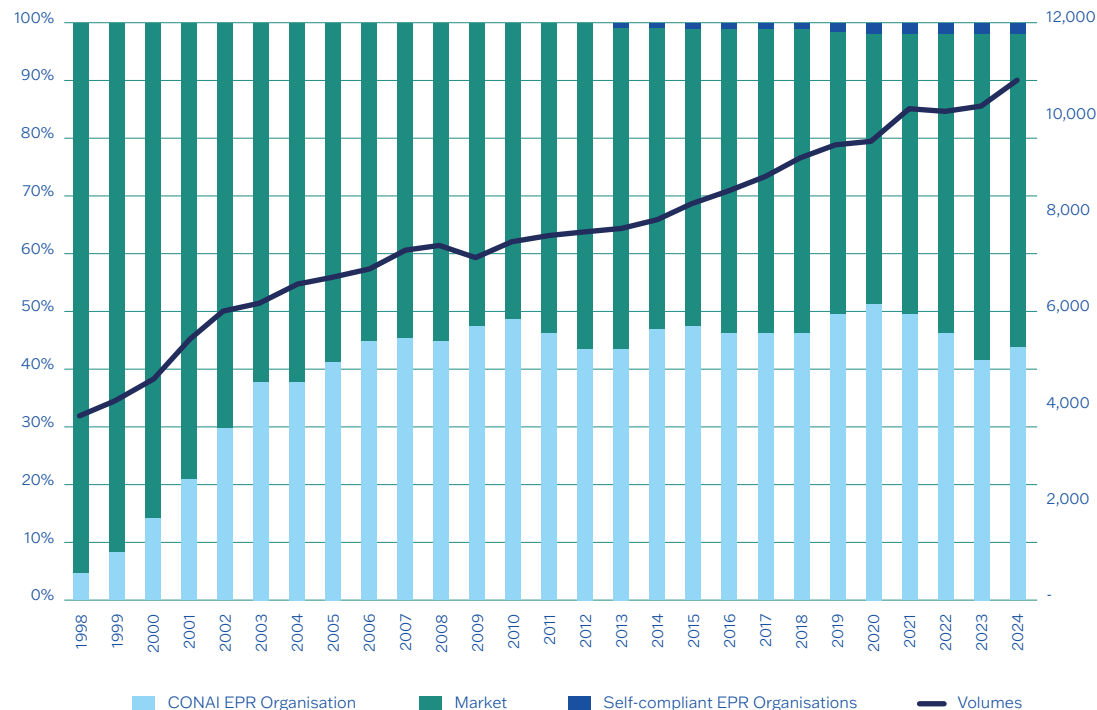
Constant growth throughout the sector.

CONAI, a private law body with a public mandate, plays a central role in coordinating the market and promoting the effective, efficient, economical and transparent management of packaging and packaging waste.

Through various initiatives, CONAI demonstrates that environmental protection and competition can coexist.

This is clearly evident from the data and results of packaging waste recycling, obtained through the combined management of Packaging Material Consortia, Self-compliant EPR Organisations and market operators. In fact, in the 27 years that the CONAI System has been active, there has never been a reduction of volumes between these two dimensions. Instead, there has been constant growth that has enabled the country to achieve objectives set by the legislator ahead of schedule.

The CONAI EPR Organisation supports the growth of all operators and recycling.





The distributed value



The CONAI System's support for recycling

Payments made to municipalities.

The payments made to municipalities – through the Packaging Material Consortia – is the most important instrument through which the CONAI System promotes the growth of separate collection of packaging waste.

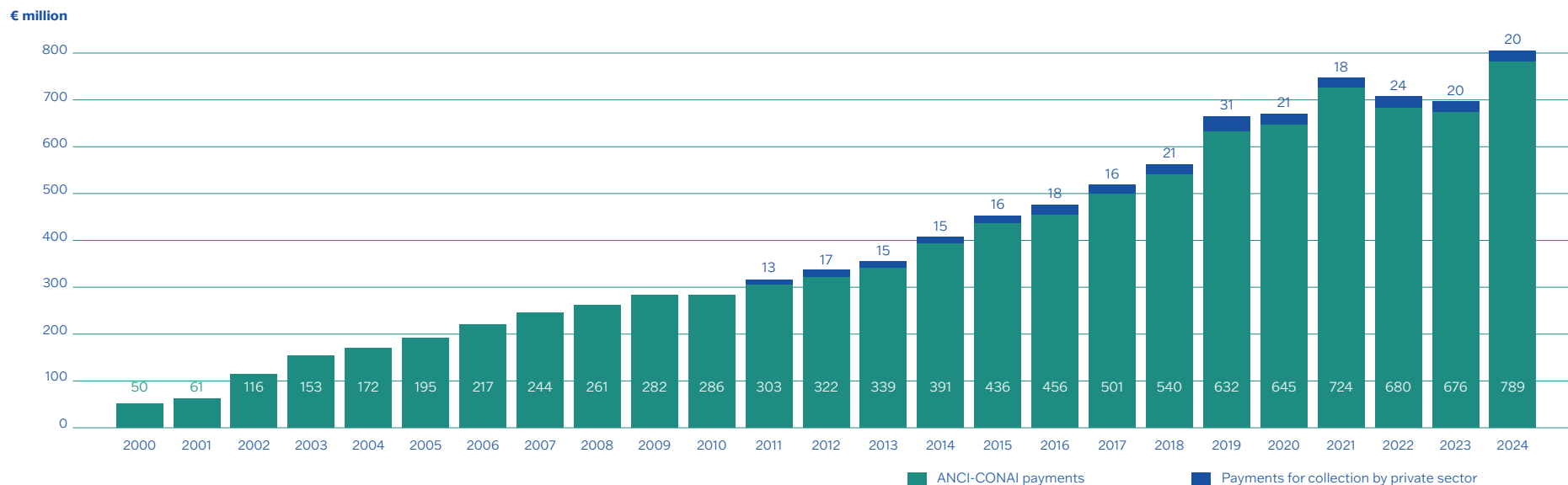


Between 2001 and 2024

OVERALL TOTAL
more than €9.4 billion

paid by the CONAI System
to municipalities/operators to
support separate collection

PAYMENTS SUPPORTING SEPARATE COLLECTION



Source: Data generated from historical data by the CONAI Research Centre.



The CONAI System's support for recycling

Contribution to recycling and energy recovery.

The contribution made to sector operators – through the Packaging Material Consortia – is the instrument through which the CONAI System promotes the development of the recycling and recovery chain for packaging waste. This item also includes costs incurred for the creation of new recycling streams and for experimental activities promoted by Packaging Material Consortia.



Between 2001 and 2024

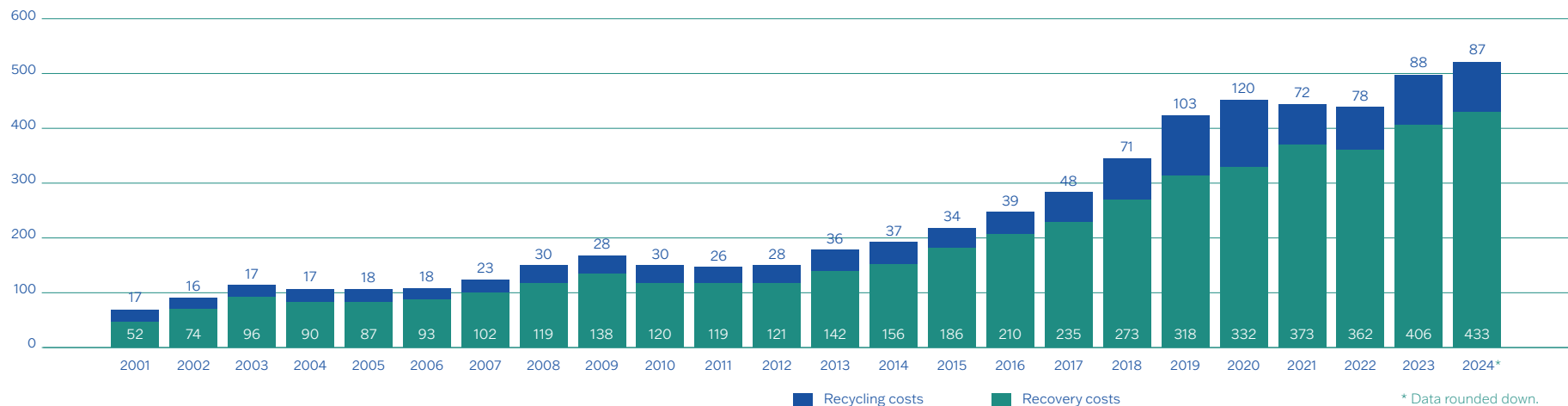
OVERALL TOTAL

more than €5.7 billion

paid by the CONAI System to cover the costs of recycling and recovery of packaging

CONTRIBUTION TO RECYCLING AND RECOVERY

€ million



Source: Data generated from historical data by the CONAI Research Centre.

* Data rounded down.

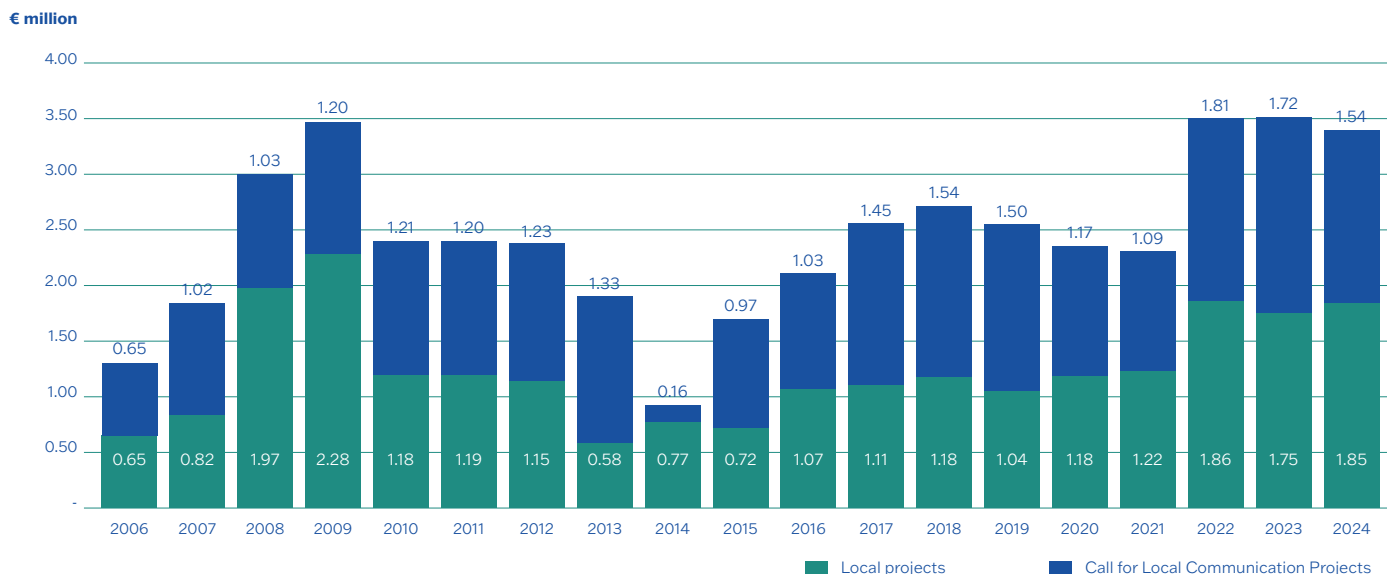


CONAI support for recycling

Local projects.

ANCI and CONAI have agreed, within the Framework Agreement and with specific reference to the management of packaging waste, to support the local development of effective, efficient, economical and transparent municipal waste management methods, with a particular focus on the areas of the country that are lagging furthest behind. The available resources are allocated to individual projects based on requests for support from the local area, which are duly verified before being accepted.

LOCAL PROJECTS



Source: Data generated by CONAI Research Centre, from historical data.



Between 2006 and 2024

OVERALL TOTAL
more than €46 million

Paid by CONAI into local projects
and local communication projects



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