



# Specific Prevention and Management Plan for packaging and packaging waste

November 2021

# FOREWORD

The Specific Prevention and Management Plan for packaging and packaging waste (or PSP) has been **drafted by CONAI** as required by Article 225, Section 3, of the Consolidated Environmental Act.

Its **objective** is to provide a clear and effective overview of the work carried out and the results expected in the area of packaging and packaging waste management, with a two-year 2021-2022 horizon.

The PSP is founded on the **institutional documents** that the Material Consortia and Autonomous Systems have sent to CONAI in accordance with current legislation.



# CONAI: WHO WE ARE AND WHAT WE DO

## THE FIRST EPR SYSTEM IN ITALY DEDICATED TO PACKAGING

CONAI – **Consorzio Nazionale Imballaggi** (National Packaging Consorzium) – consists of over **750,000 businesses** that produce and use packaging.

We are a **non-profit** consortium established by law to implement the **Extended Producer Responsibility (EPR)** principle for producers/users of packaging. The law tasks CONAI with important **assignments**.



Ensure that **targets are met** for packaging waste recovery and recycling as established by law, and oversee cooperation between the Consortia and other economic actors.



Operate according to the principle of **subsidiarity**, taking the place of waste collection service managers in the event that waste collection services run by public administrations are inadequate, in order to meet recovery and recycling



**Incentivise recycling and recovery** of secondary raw materials by promoting the market for their use.

123

**Acquire data** on the flow of packaging in and out of the country and the data of relevant economic actors, and provide data and information requested by the Ministry of Ecological Transition.



Ensure **compliance** with the “**polluter pays**” principle for producers and users by calculating the CONAI Environmental Contribution (CAC).



**Reduce packaging waste sent to landfills** by promoting methods for its recovery.



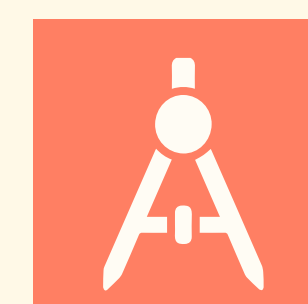
**Organise information, training and awareness-raising campaigns** targeting users of packaging and consumers in particular.



Promote and **coordinate separate collection initiatives** for packaging waste, according to **efficiency, effectiveness and cost-effectiveness** criteria.



**Set out a framework programme agreement** at the national level with the Association of Italian Municipalities (ANCI), the Union of Italian Provinces (UPO) or with **local authorities**, to guarantee application of the principle of shared management responsibility between producers, users and public administrations (authorities).



**Facilitate prevention** of the environmental impact of packaging and packaging waste, through **studies and research** to produce **environmentally-friendly**, reusable and recyclable packaging.

# EPR packaging waste management systems: CONAI Material Consortia and Autonomous Systems



**CONAI directs** the activities of **7 private and non-profit Material Consortia** that work to collect and recycle/recover various packaging waste materials **throughout the country**, in accordance with the principle of **subsidiarity to the market**.



There are currently **3 Autonomous Consortia** working to recover **specific types of plastic packaging** through recycling.

**The**

**BACKGROUND**

**CONTEXT**


# GLOBAL MACROECONOMIC CONTEXT


2021 is showing positive signs for manufacturing and global trade.


Global GDP growth is expected to recoup the losses sustained last year due to the pandemic.

## GROSS DOMESTIC PRODUCT - annual % change at constant prices

	2009	2020	2021	2022	2023
<b>GLOBAL GDP</b>	-0.4	-3.2	5.9	4.1	3.6
USA	-2.5	-3.4	6.0	4.1	2.5
EMU	-4.5	-6.5	5.0	4.2	2.6
<i>Germany</i>	-5.6	-4.9	2.4	4.2	2.7
China	9.2	2.1	8.4	4.7	5.1
<b>GLOBAL TRADE</b>	-12.3	-5.3	8.5	6.1	4.4

 **- 3.2%**  
2020

 **+ 5.9%**  
2021

 **+ 4.1%**  
2022

SOURCE: Prometeia, Forecast Report, September 2021

# ITALY MACROECONOMIC CONTEXT

- Expected recovery in household consumption, driven by the vaccination campaign and reopenings, though hampered by inflationary tensions.
- Expected increases in public and private investment also in 2022 with the implementation of the PNRR (National Recovery and Resilience Plan).

## RECOVERY TO PRE-PANDEMIC LEVELS IN THE SECOND QUARTER OF 2022 - GDP and components (annual average % change)

	2020	2021	2022	2023
<b>GDP</b>	9.0	6.0 ▲	3.8 ▼	2.8 ▲
<b>Domestic consumption *</b>	-11.7	4.2 ▲	4.4 ▼	3.0 ▼
<b>Investments in mach. &amp; equip.</b>	-11.2	11.2 ▼	9.4 ▲	6.2 ▲
<b>Investments in construction</b>	-7.0	21.6 ▲	8.0 ▲	7.1 ▲
<b>Exports</b>	-14.7	12.6 ▲	9.2 =	5.8 ▲
<b>Imports</b>	-13.4	13.2 ▼	11.9 =	7.2 ▲
<b>Consumer prices</b>	-0.1	1.8 ▲	1.5 ▲	1.4 =

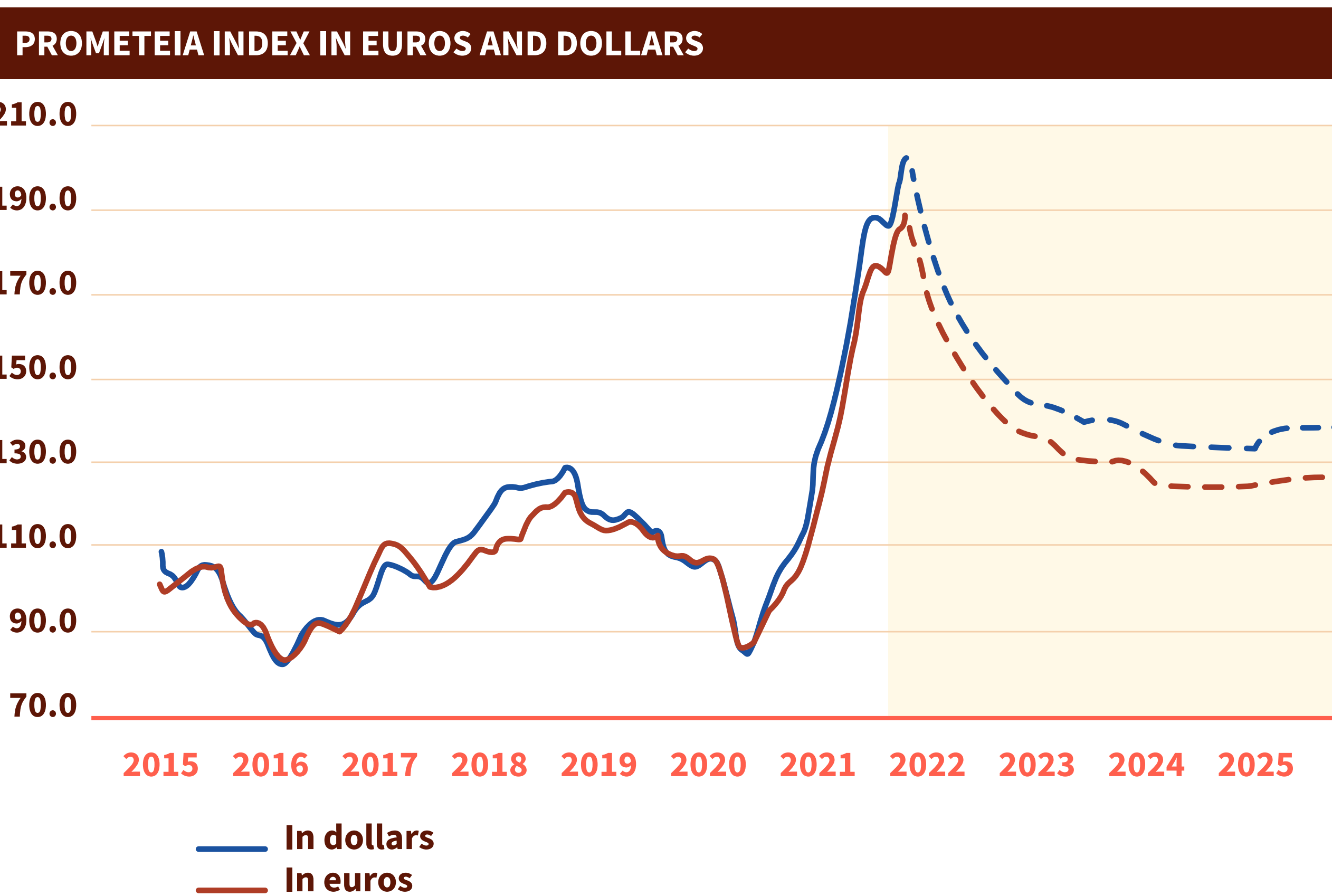
\* Consumption by Italian households and foreign tourists in Italy

SOURCE: Prometeia, September 2021 scenario

# THE MADDENING UNKNOWN: THE PRICE OF COMMODITIES

There was a sharp rise in the first months of the year, which then stabilised over the summer, followed by a renewed increase in September fuelled primarily by rising energy prices.

Double-digit rises are expected for almost all raw materials, with easing only expected from 2022.






# THE SITUATION FOR PACKAGING COMMODITIES

For 2021, prices of all packaging commodities are expected to rise consistently:

 **+106%**  
STEEL

 **+42%**  
ALUMINIUM

 **+ 75%**  
PLASTICS

 **+ 39%**  
CELLULOSE

 **+ 58%**  
TIMBER FROM CONIFER

 **+ 3.5%**  
SILICA

## PRICES OF COMMODITIES - % change, in euros

	2021		2022	
Timber	58.1	▲	-34.4	▼
Plastics	74.6	▲	-24.1	▼
Steel	105.8	▲	-26.7	▼
Aluminium	41.9	▲	9.6	▼
Cellulose	38.9	▲	-12.6	▼
Silica (glass)	3.5	▲	-5.4	▼

SOURCE: Prometeia

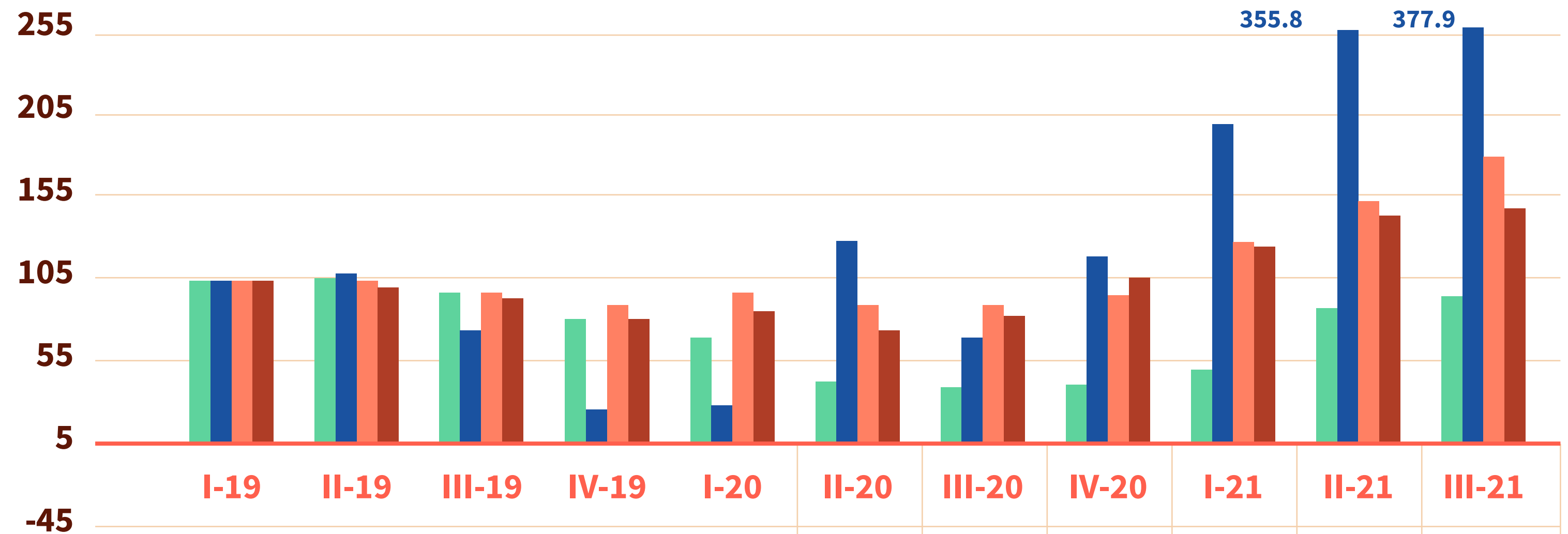
# AND ITS IMPACT ON SECONDARY RAW MATERIALS

Further increases are expected for secondary raw materials in late 2021:

- Increasing prices for waste paper.
- Relatively stable prices for recycled polymers, although they continue to fluctuate at the higher end.
- Increases for scrap aluminium remain modest.
- Sharp price increases for scrap iron and scrap glass.

**Prices of “secondary” raw materials**

Italian market, I-2019=100 index, quarterly averages in €



**Quarterly % change on previous quarter**

■ Recycled polyethene	-42.2	-7.7	6.3	29.4	78.8	6.8
■ Waste paper	441.7	-46.9	73.9	70.0	81.4	6.2
■ Scrap iron	-8.1	1.1	6.4	37.1	19.6	18.8
■ Scrap aluminium	-17	15.4	27.9	20.5	14.5	4.3
Scrap glass	385.8	0.0	29.7	14.2	25.1	15.6

Scrap glass not included on the graph due to scale

# NATIONAL LAW 1/2

## Ministry of Ecological Transition memorandum of 12 April 2021 on the transposition of the Circular Economy Package

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- Definition of limits for delivery of municipal waste by non-domestic users.

**SUP Directive** - Directive on reducing the impact of certain plastic products on the environment: draft transposition decree.

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- 5 August 2021 - preliminarily approved by the Council of Ministers.
- 22 September - notification to the European Commission.

## Legislative Decree Simplifications

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- Establishment of deposit return systems for glass, plastic and metal packaging containing liquid food-stuffs.

## “Plastic-eater” experimental programme

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- Contribution to Municipalities for installing machinery for separate collection of PET drinks bottles which can selectively recognise PET bottles and reduce their volume, encouraging recycling.

# NATIONAL LAW 2/2

## PNRR (National Recovery and Resilience Plan)

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- **National strategy for the circular economy** - public consultation.
- 29 September 2021 – publication of decrees defining the recipients of economic resources and the relevant allocation procedures:
  - Improvement and mechanisation of the separate waste collection network and modernisation and construction of new treatment/recycling plants for municipal waste originating from separate collection.
  - Modernisation and construction of new plants to improve recycling, logistics and recycling of waste paper and cardboard, and construction of new plants for recycling plastic waste.

## 2020 Budget Law - Plastic tax

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- The “2022 Budget Plan” document postponed the implementation of the tax to 2023.

# EUROPEAN LAW

## HOT TOPICS

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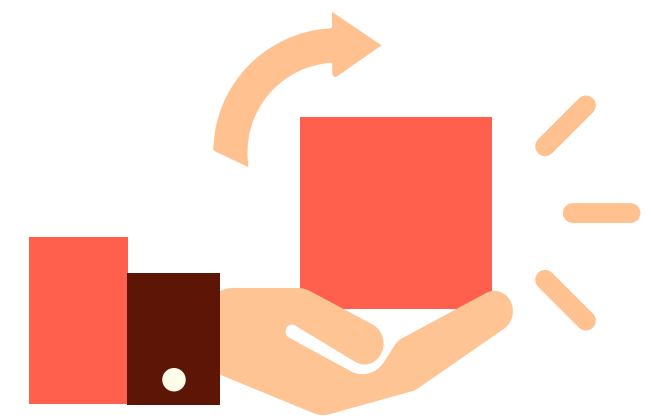
- **Review of the Packaging Directive 94/62/EC**, with the hypothesis of turning the Directive into a Regulation (postponed to 2022).
- Start of the **harmonisation processes at the EU level** for **separate waste collection** of municipal waste and **labelling** of packaging.
- **High quality recycling** and new definition of recycling.
- **Pursuit of development of additional European end-of-waste criteria** and identification of by-products.
- **Revision of the Waste Shipment Regulation** to improve the traceability of intra-EU waste trade and stop hazardous waste from being exported to third countries.

**EXPECTED**

**RESULTS**

# 2021 FORECASTS

Following the acute year of crisis and the subsequent recovery in products placed on the market, there is now **renewed vitality in overall recycling**, which is growing at a faster pace than the amount placed on the market.



## PACKAGING PLACED ON THE MARKET

**13.8 MILLION**  
TONNES

**in 2021** +5.1% from 2020



## PACKAGING WASTE SENT FOR RECYCLING

**10 MILLION**  
TONNES

**in 2021** +5.3% from 2020



## DELIVERIES

**5.3 MILLION**  
TONNES

**in 2021** +1.2% from 2020

RECYCLING  
RATE



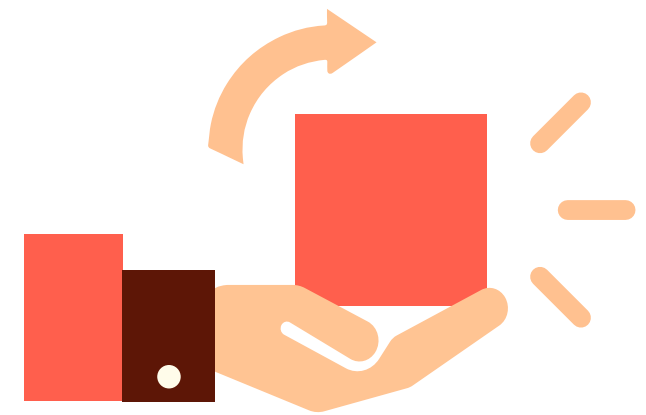
**73.1%**

in 2021

*The data does not yet account for modifications introduced by the Decision concerning the procedures for calculating the results of plastic recycling and recovery, which will mainly affect the results for plastic packaging waste, which will see an estimated decrease of 10%.*

# 2022 FORECASTS

Further improvements expected in 2022.



## PACKAGING PLACED ON THE MARKET

**14.2 MILLION**  
TONNES

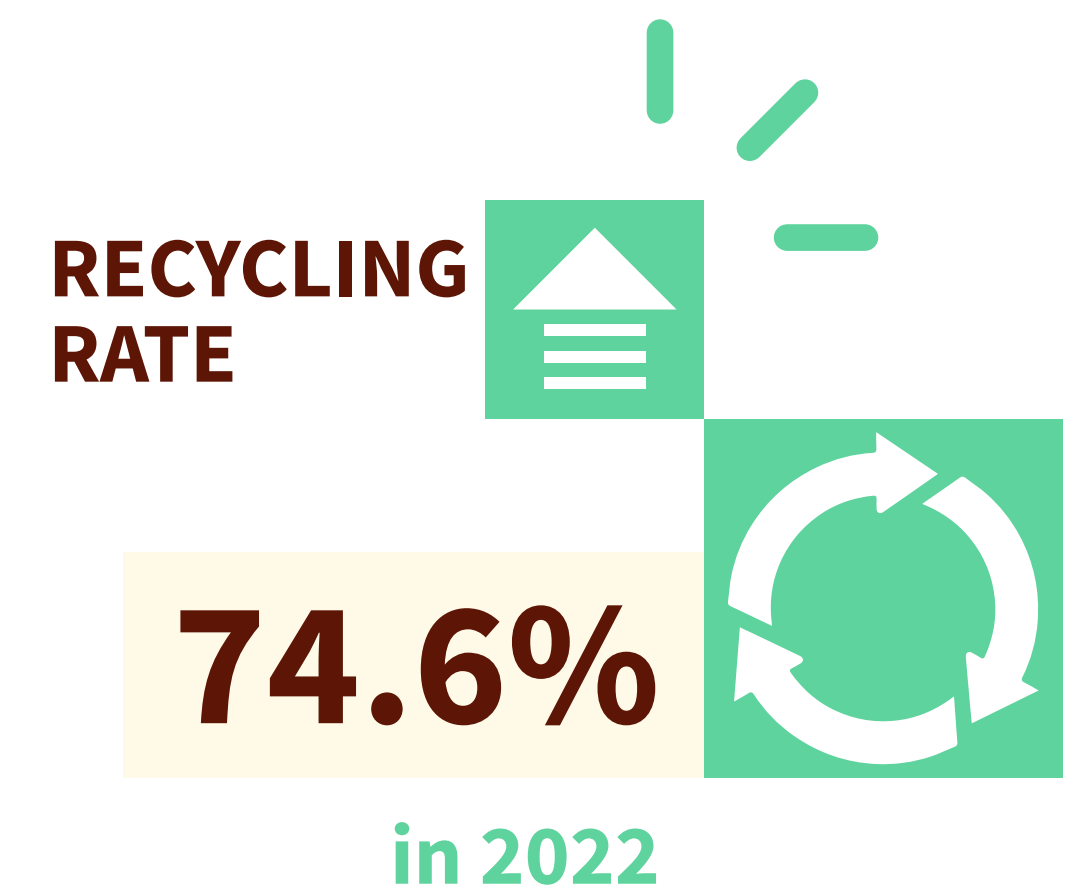
**in 2022** +3.5% from 2021



## PACKAGING WASTE SENT FOR RECYCLING

**10.6 MILLION**  
TONNES

**in 2022** +5.7% from 2021



## DELIVERIES

**5.6 MILLION**  
TONNES

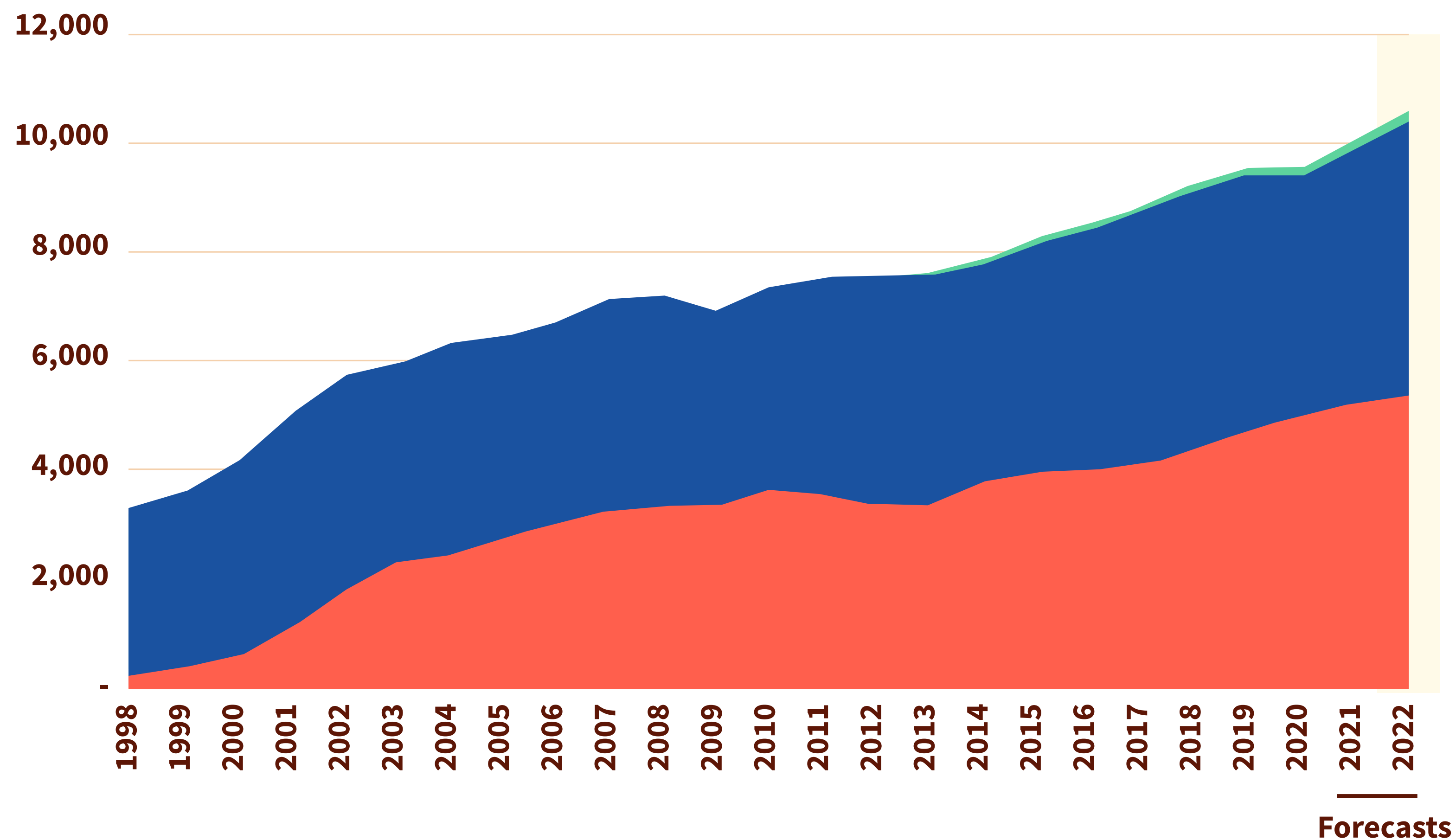
**in 2022** +5.7% from 2021

*The data does not yet account for modifications introduced by the Decision concerning the procedures for calculating the results of plastic recycling and recovery, which will mainly affect the results for plastic packaging waste, which will see an estimated decrease of 10%.*





# CONTRIBUTION TO NATIONAL RECYCLING

## BY MATERIAL CONSORTIA, AUTONOMOUS SYSTEMS AND MARKET



In line with the expansionary phases of the economy and the role of subsidiarity to the market, **the contribution of the Consortia management system on recycling is expected to decrease.**

- AUTONOMOUS SYSTEMS**  
in 2022 → 2%
- INDEPENDENT MANAGEMENT (market)**  
in 2022 → 47%
- CONSORTIA MANAGEMENT**  
in 2021 → 52%   
in 2022 → 51% 



## REPORTING

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- **Traceability of data** and the **procedures** used to gather, manage and analyse this data.
- Standardised data **reporting methods**.

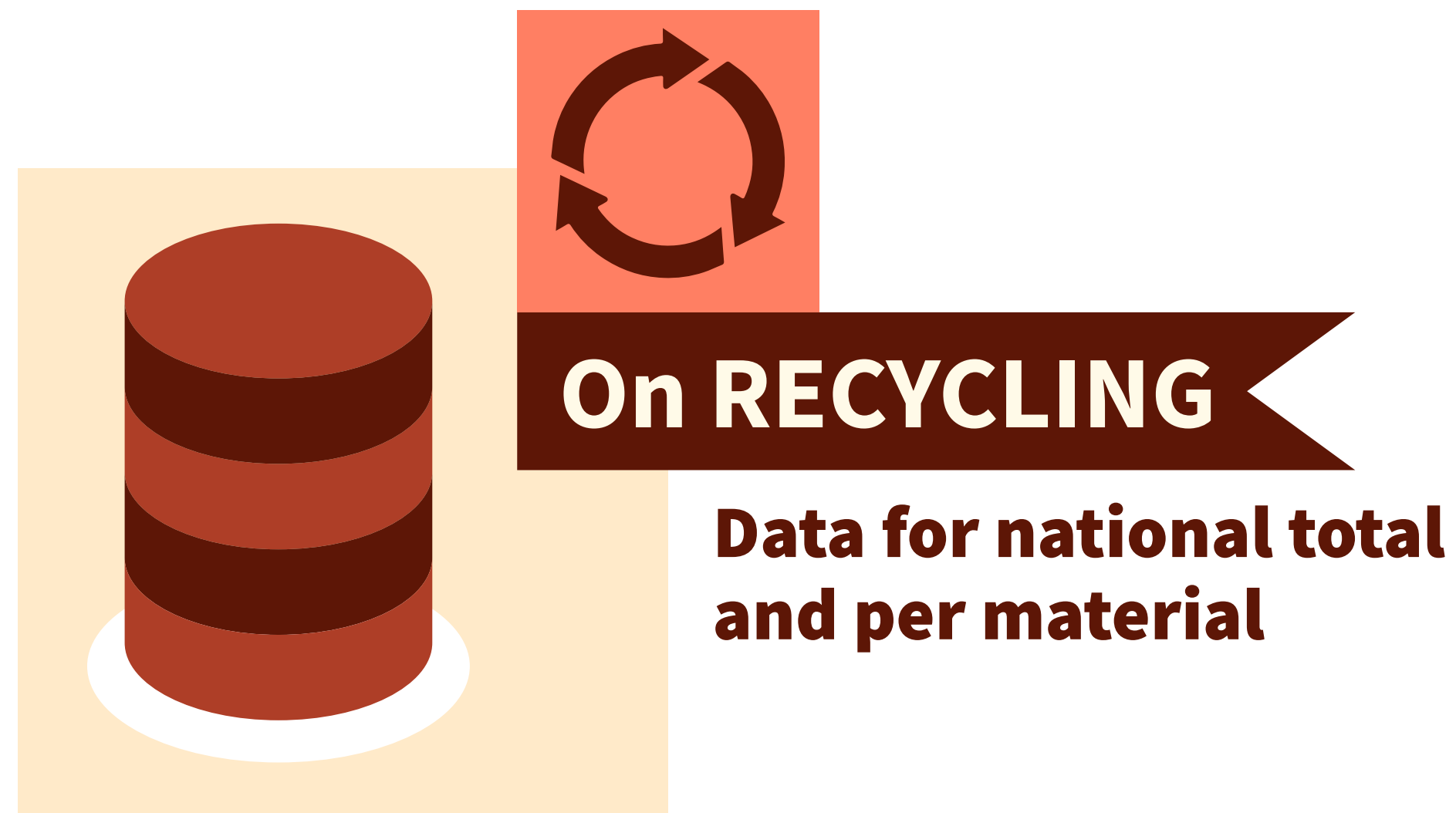
## “OBIETTIVO RICICLO” PROJECT

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**Successfully concluded verification and approval** of the procedures used to produce the 2019 data for products placed on the market, recycling and recovery, by a third-party certification body.

# SINGLE DATA ASSET

CONAI has a single data asset for data on packaging and packaging waste, consisting as follows:



## SOURCES

CONAI Material Consortia  
Autonomous systems  
Market



## SOURCES

CONAI Material Consortia

**GOAL:** make the best possible use the Consortium's data and information assets.

**The**

**INSTRUMENTS**

# ANCI-CONAI AGREEMENT



## ANCI-CONAI FRAMEWORK PROGRAMME AGREEMENT

General matters

+

Technical annexes for materials

## NEW FRAMEWORK PROGRAMME AGREEMENT

General matters

+

**Sectoral** technical annexes \* for materials

\* The reference sector is the one for the material that the packaging is made of (reference sector = technical annex)

# NEW ANCI-CONAI AGREEMENT

CONAI and the autonomous systems promote a Framework Programme Agreement on a national basis with the Association of Italian Municipalities (ANCI), the Union of Italian Provinces (UPI) and local environmental authorities.

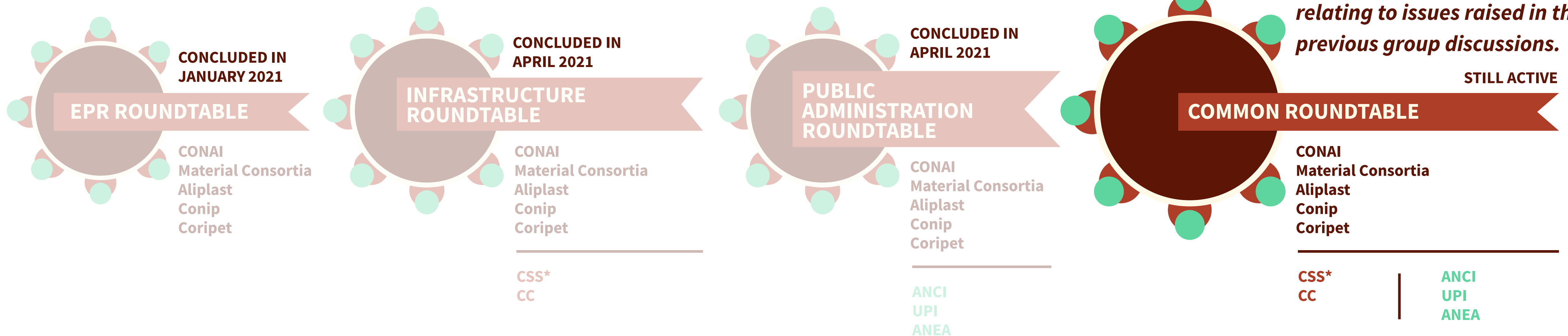
**SINCE NOVEMBER 2020:** ■ Conducted meetings  
■ Activated working groups

*To oversee, where required, the transition period until the New Framework Programme Agreement is shared.*

**+8 TRANSITION ROUNDTABLES**

*Primary reflections and activities relating to issues raised in the previous group discussions.*

STILL ACTIVE



\* N.B. The Competition Bill (DDL Concorrenza) contains an amendment to the Consolidated Environmental Act (TUA) which was not in force at the date this document was compiled, which does not include the CSS among the signatories of the Framework Programme Agreement.

# ANCI-BIOREPACK TECHNICAL ANNEX

The ANCI-BIOREPACK technical annex constitutes the technical annex of the new Material Consortium expands the CONAI – Material Consortia system to include collection of the organic portion of municipal solid waste.

## SCOPE

Covering the **costs of collection, transport and treatment** of biodegradable and compostable plastic packaging waste and its delivery in the **collection of the organic portion** of municipal waste.

## PAYMENTS

Based on the **proportion of biodegradable plastic packaging waste** in the organic collection according to its **quality**, defined **based on the content of non-compostable material**.

## ENTERED INTO FORCE

Retroactivity of the effects of the convention from 1 January 2021

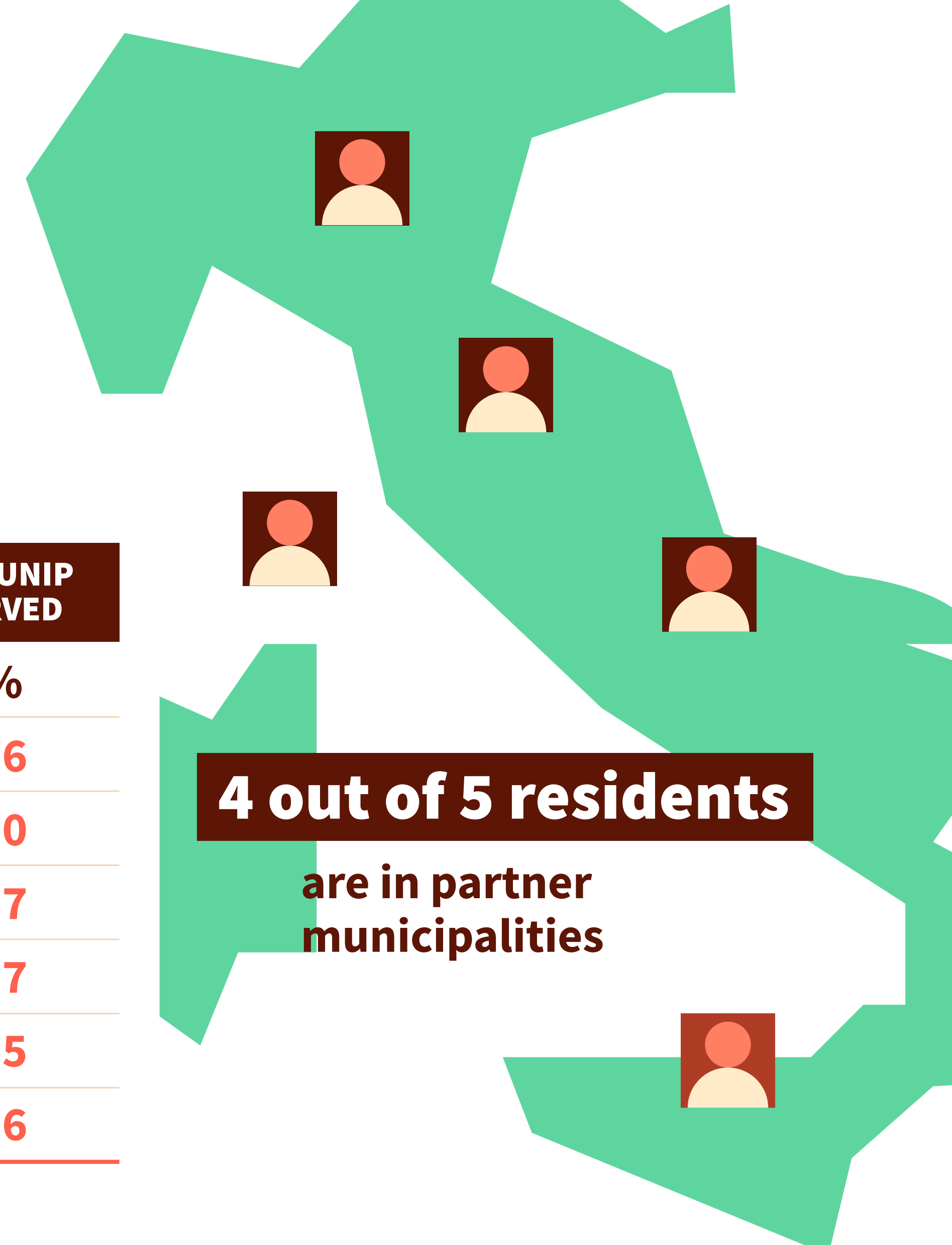
MAIN UPDATE  
2021



# PARTNERSHIP FRAMEWORK AS OF 31 DECEMBER 2021

The prevalence of agreements entered into with municipalities/managers is testament to the effectiveness of the Framework Agreement as an instrument for supporting and assisting the municipalities.

	RESIDENTS COVERED	% POPULATION COVERED	MUNIP SERVED	% MUNIP SERVED
Material	million	%	No.	%
Steel	52	87	5,980	76
Aluminium	46.7	79	5,568	70
Paper	57.6	94	7,112	87
Wood	42.4	72	4,498	57
Plastic	57.2	97	7,485	95
Glass	58.4	97	7,548	96

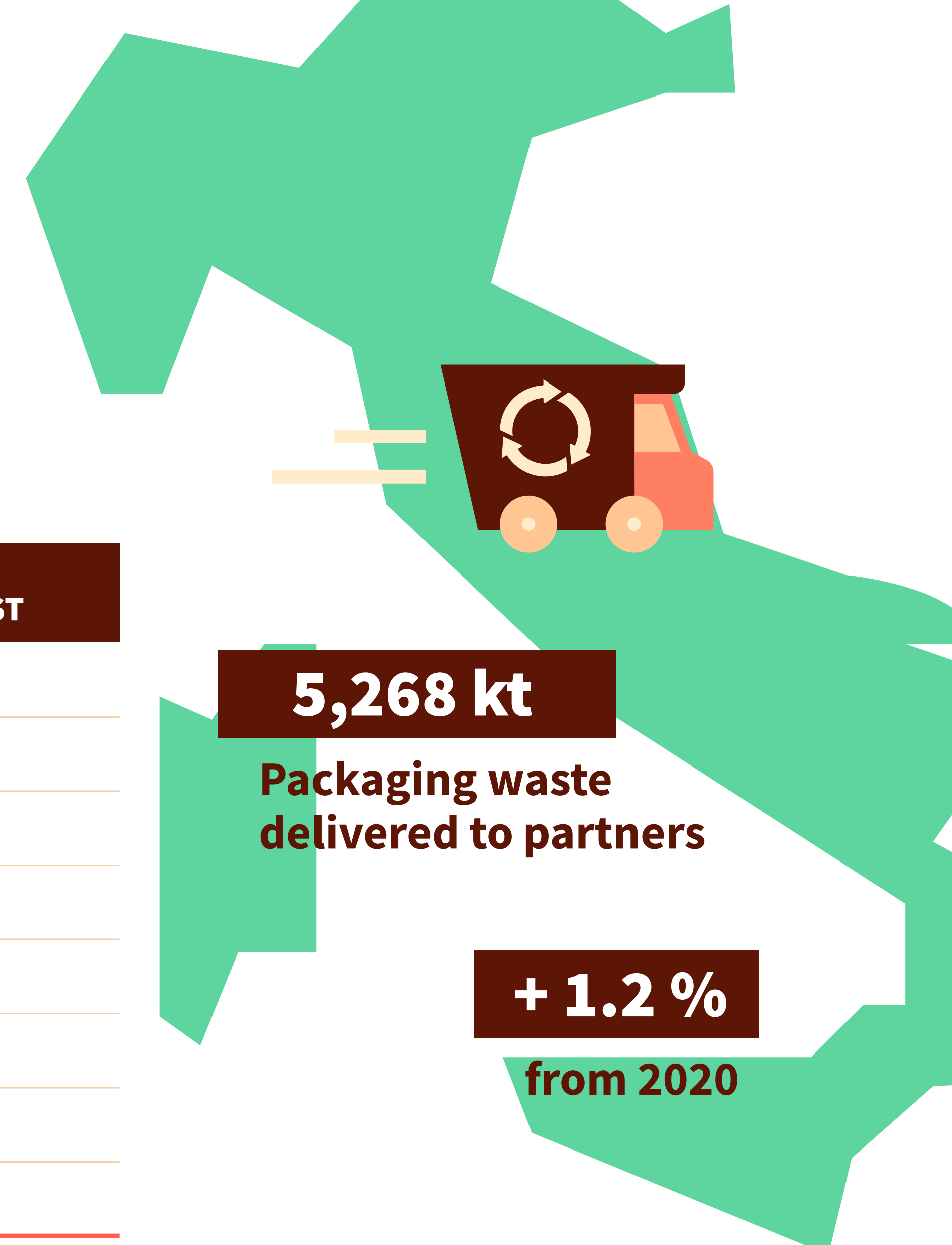




# PACKAGING WASTE DELIVERED TO PARTNERS

	2020	2021 FORECAST	2022 FORECAST
Material	Kt	Kt	Kt
Steel	209	170	215
Aluminium	17.8	16.8	17.4
Paper	1,439	1,531	1,444
Wood*	130	23	142
Plastic	1,305	1,337	1,390
Glass	2,104	2,190	2,359
<b>TOTAL</b>	<b>5,204</b>	<b>5,268</b>	<b>5,567</b>

\* The 2021 figure for wood packaging waste is for the months of January and February only, as negotiations to conclude the new Technical Annex are still in progress.



**5,268 kt**

Packaging waste delivered to partners

**+ 1.2 %**

from 2020

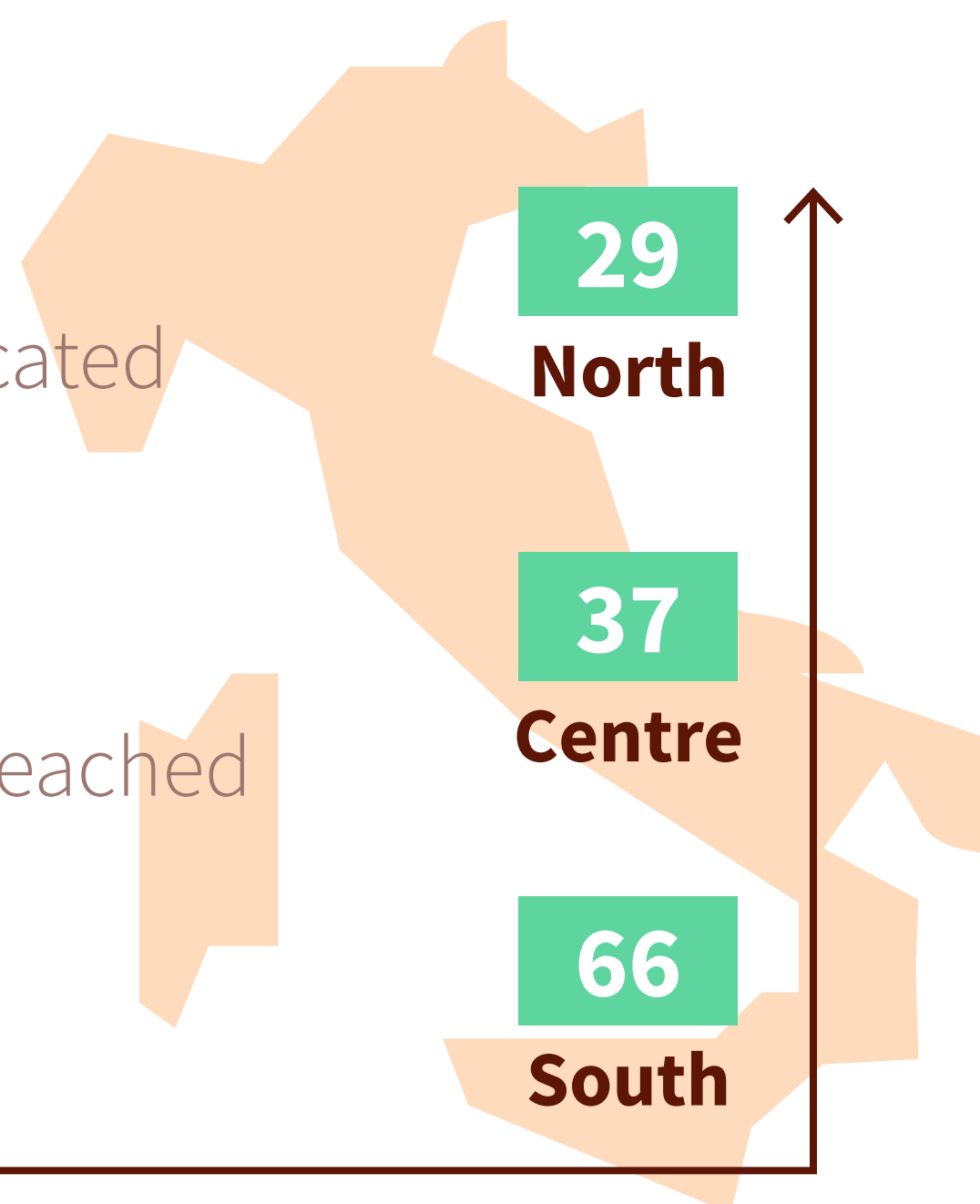


# ANCI-CONAI TENDER for local communication

Goal: raise local awareness about separate collection for packaging waste

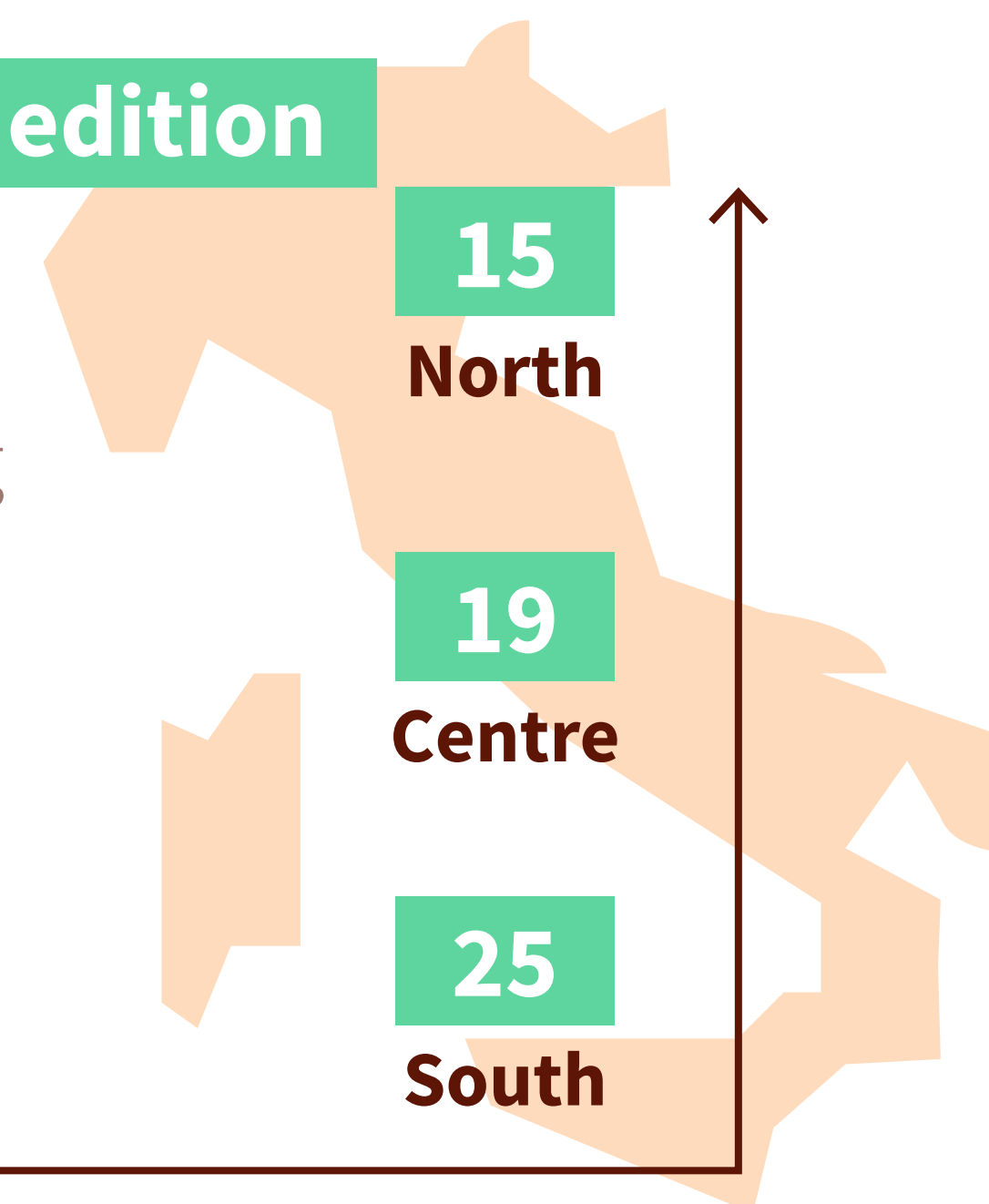
## 2020/2021 edition

- **€1,100,000** of funding allocated
- **41 projects** co-funded
- **Over 10 million** residents reached
- **132 projects** submitted



## Launch of 2021/2022 edition

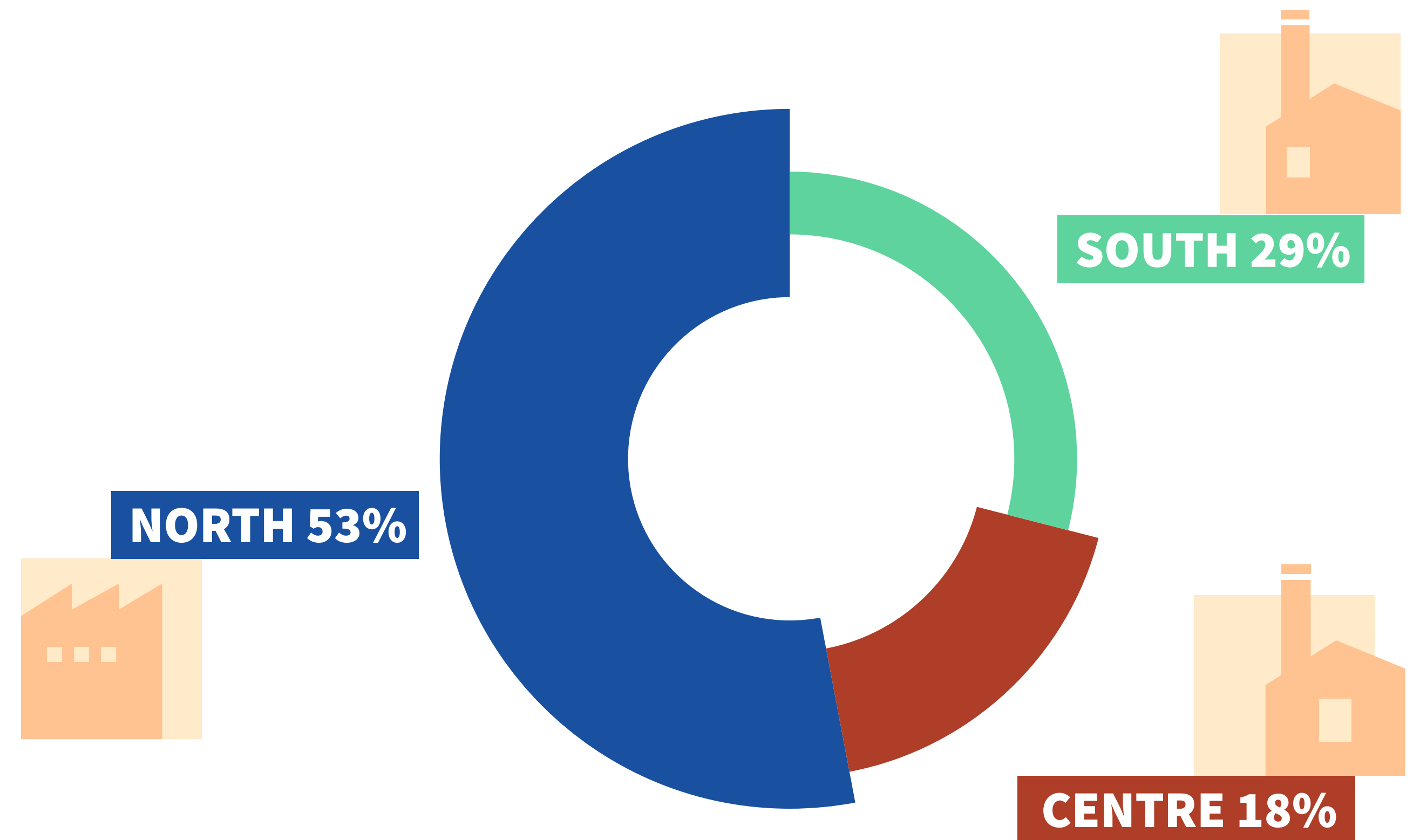
- New online platform for submitting and managing projects
- In progress: analysis of submitted projects
- **59 projects** submitted



# THE NETWORK OF PLATFORMS FOR INDUSTRIAL AND COMMERCIAL PACKAGING WASTE

**Over 580 platforms have been set up across the country** for delivering secondary and tertiary packaging waste, for which the consortia platform assumes the costs of sorting and recovery.

The activity of the platforms so far has proven to be significant, particularly for secondary and tertiary packaging made from **wood material** (estimated at **over 905,000 tonnes in 2021**), and to a lesser extent for other materials.



# SUPPORT FOR AREAS THAT ARE BEHIND

## CAMPANIA

### Scope:

Campania Region  
Casoria Environment Organisation  
Asia Benevento SpA  
Caserta Environment Authority  
Napoli 1 Environment Authority  
Napoli 2 Environment Authority  
Avellino Environment Authority  
Benevento Environment Authority  
Salerno Environment Authority  
Salerno Pulita (Clean)

## SICILIA

### Scope:

Sicily Region  
Palermo Municipality  
Sicily Legambiente  
(environment group) – Munnizza Free

## PUGLIA

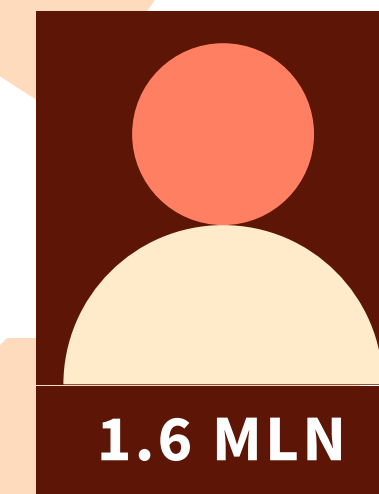
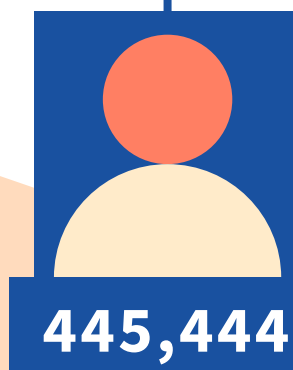
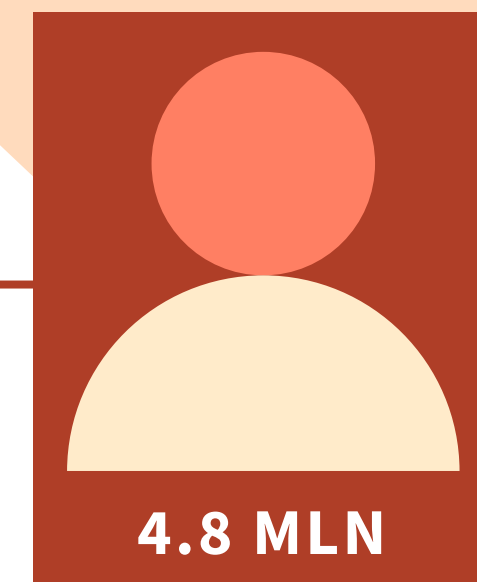
### Scope:

Bari Municipality  
Taranto Municipality  
ARO 8 BA Optimal Collection Area

## CALABRIA

### Scope:

Vibo Valentia Local Environment Agency  
Cosenza Local Environment Agency  
5 Reggio Calabria Metropolitan Cities  
Local Environment Agency  
Reggio Calabria Municipality  
Crotona Local Environment Agency  
Calabria Region



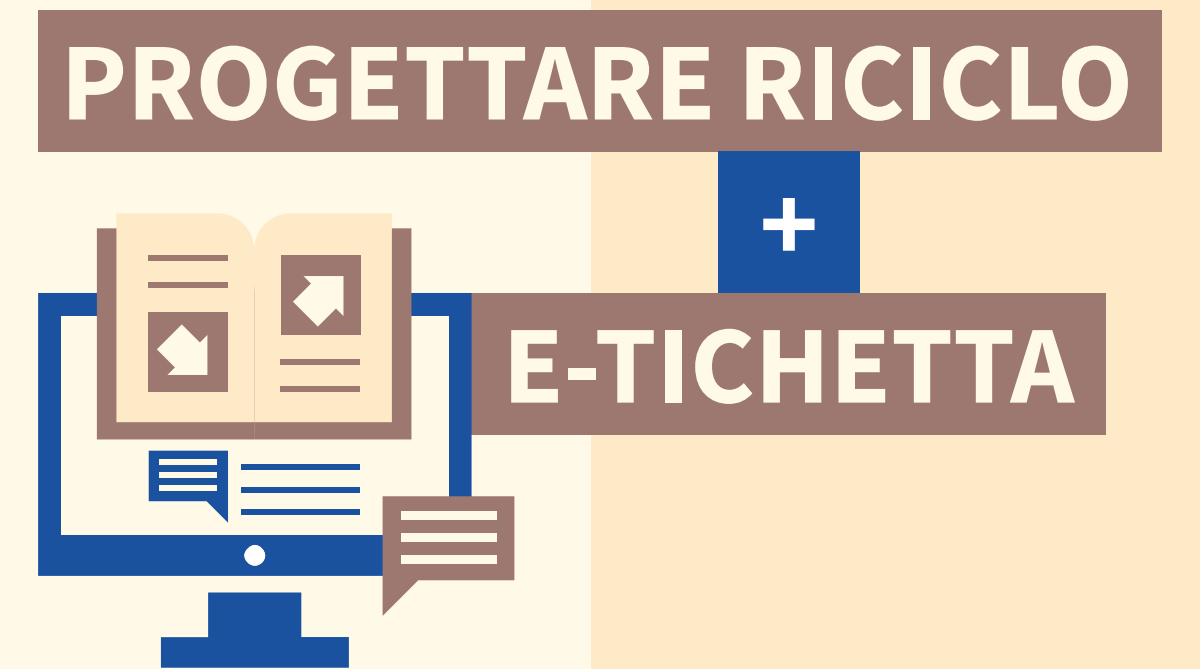
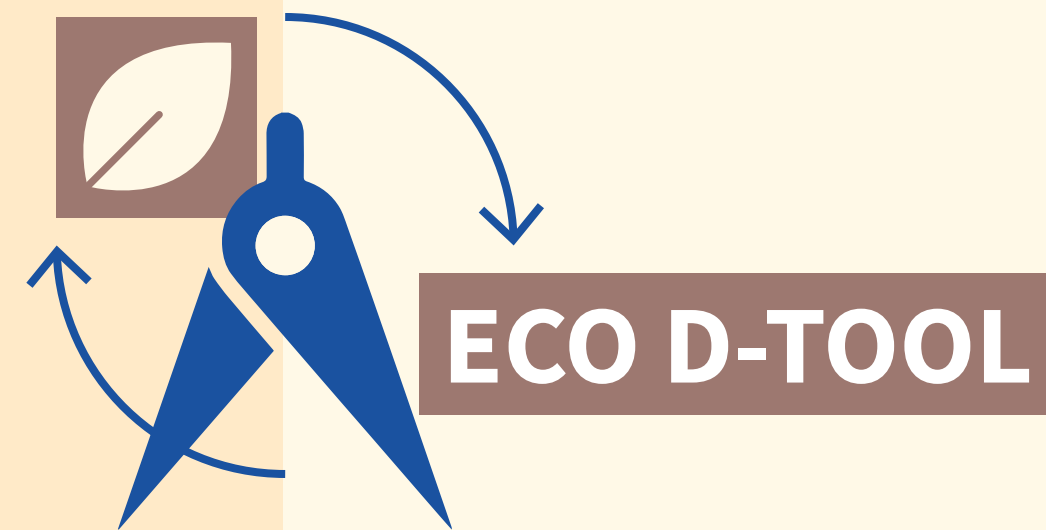
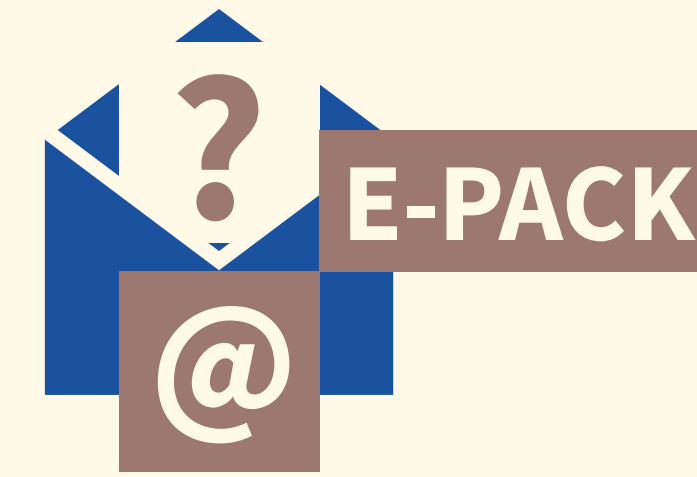
TOTAL RESIDENTS REACHED

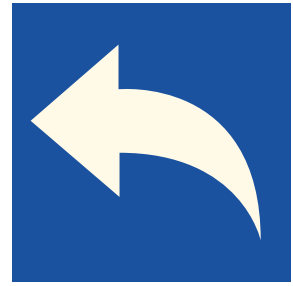
11,600,000

# PENSARE FUTURO

(“IMAGINING THE FUTURE”)

Eco-design for increasingly sustainable and recyclable packaging.





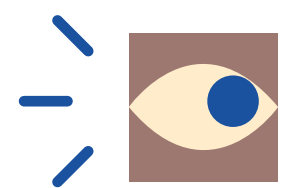
# LABELLING

## The response from CONAI



- Guidelines for environmental labelling of packaging
- Guidelines for voluntary labelling of packaging

### Guidelines by sector with Associations and consortia



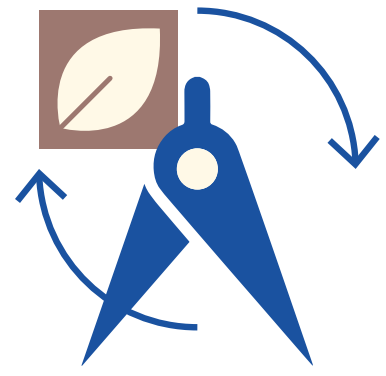
### Database of collection systems and monitoring board for labelling



[etichetta-conai.com](https://etichetta-conai.com)

MULTILINGUAL

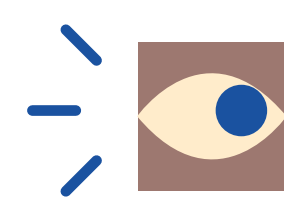
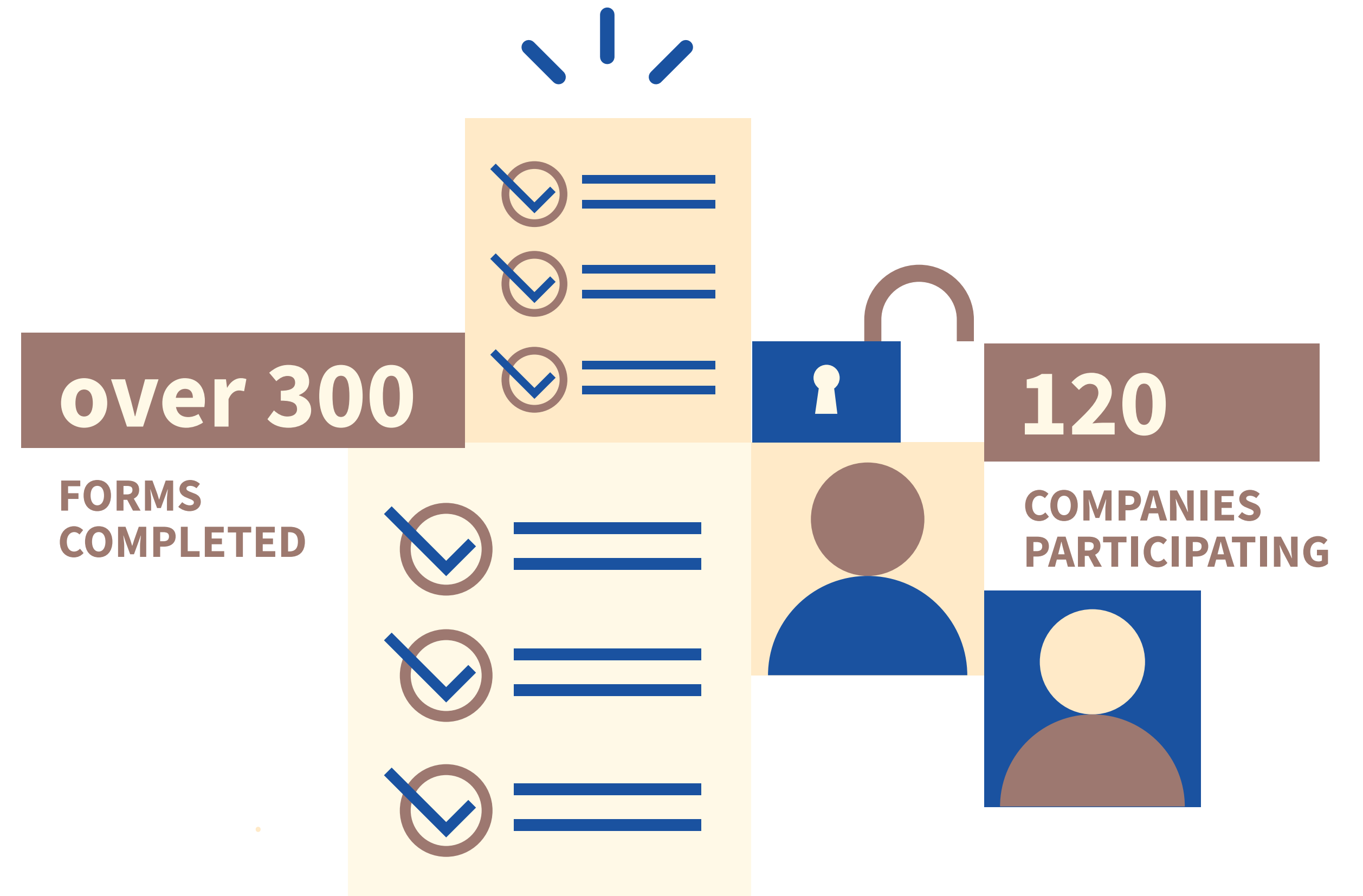
- “E-tichetta” online labelling tool
- CONAI Academy webinars
- Courses for labelling experts with TuttoAmbiente – sold out
- CONAI Academy Week: 1 week of sectoral webinars
- Call for Good Ideas to reward virtuous labels



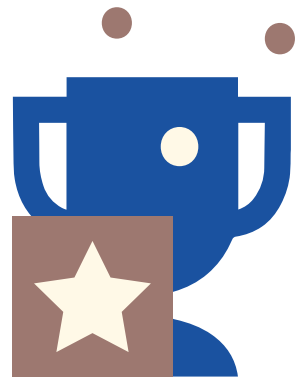
# ECOD TOOL

Simplified LCA and eco-design tool for packaging.

- **Perform** an environmental check-up of the packaging.
- **Suggest** possible eco-design improvements.
- **Compare** packaging re-design plans.



In 2022 the tool will be upgraded to enhance existing indicators and improve accessibility.

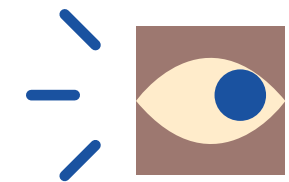


# BANDO CONAI AWARDS FOR ECODESIGN

Recognition for the most sustainable packaging solutions.



2021 edition



This initiative represents a unique vantage point for staying up to date with the latest innovations from companies in the packaging world.

■ **326 studies** submitted **+13%**

■ **109 winning** companies

■ **185 projects** incentivised **+16%**

compared to 2020

■ **Utilisation of recycled material** has doubled

■ **Raw material savings** have decreased

■ **Reuse** has tripled

★ **Legambiente** has given a special mention to one of the five winners for circular innovation

The ranking of the 185 winning studies is available on the conai.org website together with the verification statement from the DNV of the analysis and evaluation procedures.





# BANDO CONAI AWARDS FOR ECODESIGN

Recognition for the most sustainable packaging solutions.

## Extended technical committee consisting of:

**IUAV University of Venice**

Laura Badalucco

**Polytechnic University of Milan**

Barbara Del Curto

**Altroconsumo**

Claudia Chiozzotto

**University of Bologna**

Clara Giardina

**Legambiente**

Daniele Faverzani

**ItaliaImballaggio**

Stefano Lavorini

**Polytechnic University of Turin**

Silvia Barbero

The winning companies

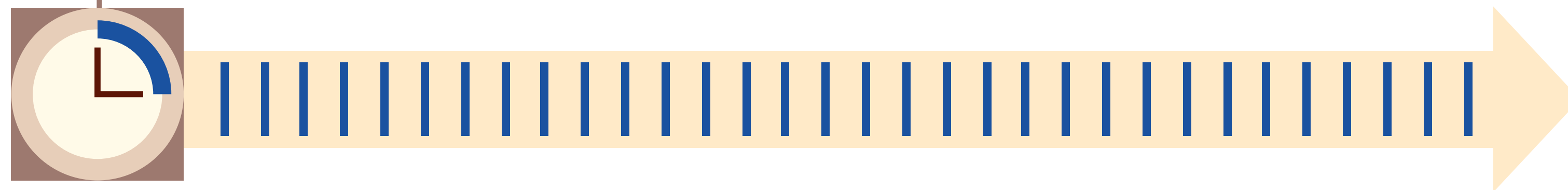


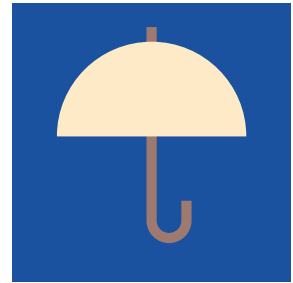


# PROTECTING COMPETITION

CONAI **protects fair competition among manufacturers and users** of packaging, and is committed to **making the system ever more accessible to businesses and vice versa.**

- Specific measures to combat tax evasion and avoidance in the different industrial, manufacturing and distribution sectors
- Information and awareness campaigns

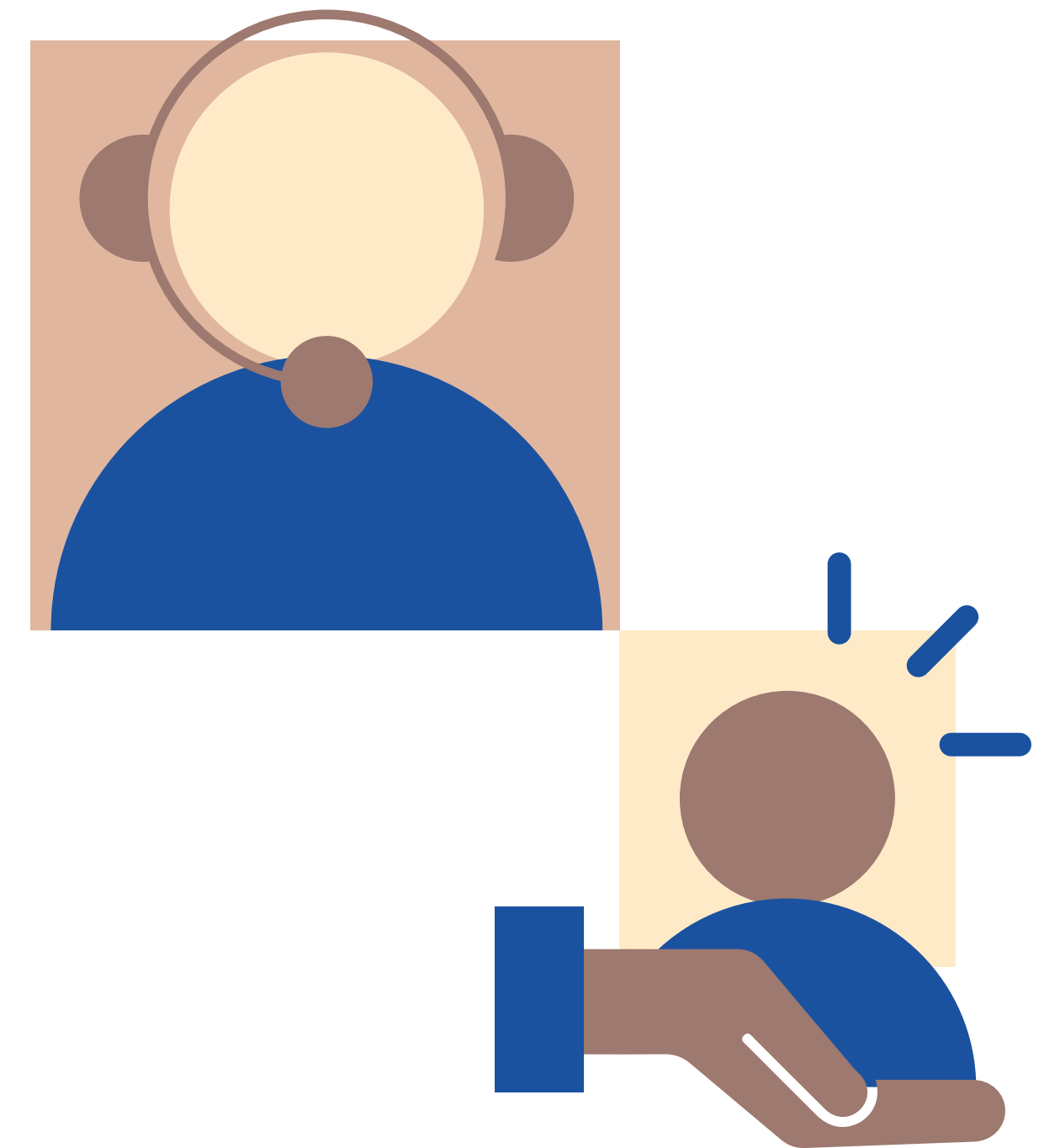




# SUPPORT FOR CONSORTIUM MEMBERS

- **Free consultancy** programme on managing packaging flows and declarations and exemptions from the contribution.
- **Facilitations:** “black annealed wire”, wood pallets returned to the market and small packaging.

➤  **In 2022: additional facilitations, simplifications and exemptions for regular exporters, self-producers and businesses that manage minimal packaging flows.**





# STUDIES AND RESEARCH

For developing and promoting the circular economy as a strategic lever for the various actors in the supply chain.



## BUSINESSES

Promoting awareness of GPP among businesses, to boost participation in public tenders.



## CITIES

Develop interventions to improve waste management at the local level.



## CONSUMERS

Encourage increasingly positive behaviour through labelling.

# UNIVERSITY TRAINING PROJECTS

Aiming to develop skills in waste packaging recycling.



## TRAINING PROJECT FOR GREEN JOBS

- **Training courses** for developing technical and regulatory skills within the circular economy.

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- **Participation of the Campania Region** - partnership with the Promos Ricerche consortium.

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- **Centre/South:** the main area involved.

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## MASTER'S DEGREE IN WASTE MANAGEMENT AND THE CIRCULAR ECONOMY

University of Basilicata

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## PARTNERSHIP WITH ENEA

**Degree awards and internships at ENEA research centres.**

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# UNIVERSITY TRAINING PROJECTS



## **CIRCULAR SOUTH - In partnership with Dock3**

Bolstering project planning and entrepreneurship in the circular economy among university students and recent graduates from universities in Southern Italy.

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## **UNIVERSITY OF TUSCIA**

Academic initiatives focusing on eco-design and recycling, recognition for degree theses and co-funding for research.

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## **MATERIALS MATTER WORKSHOP - School of Design of the Polytechnic University of Milan**

Creating projects and design objects that represent sustainability and circular economy concepts.

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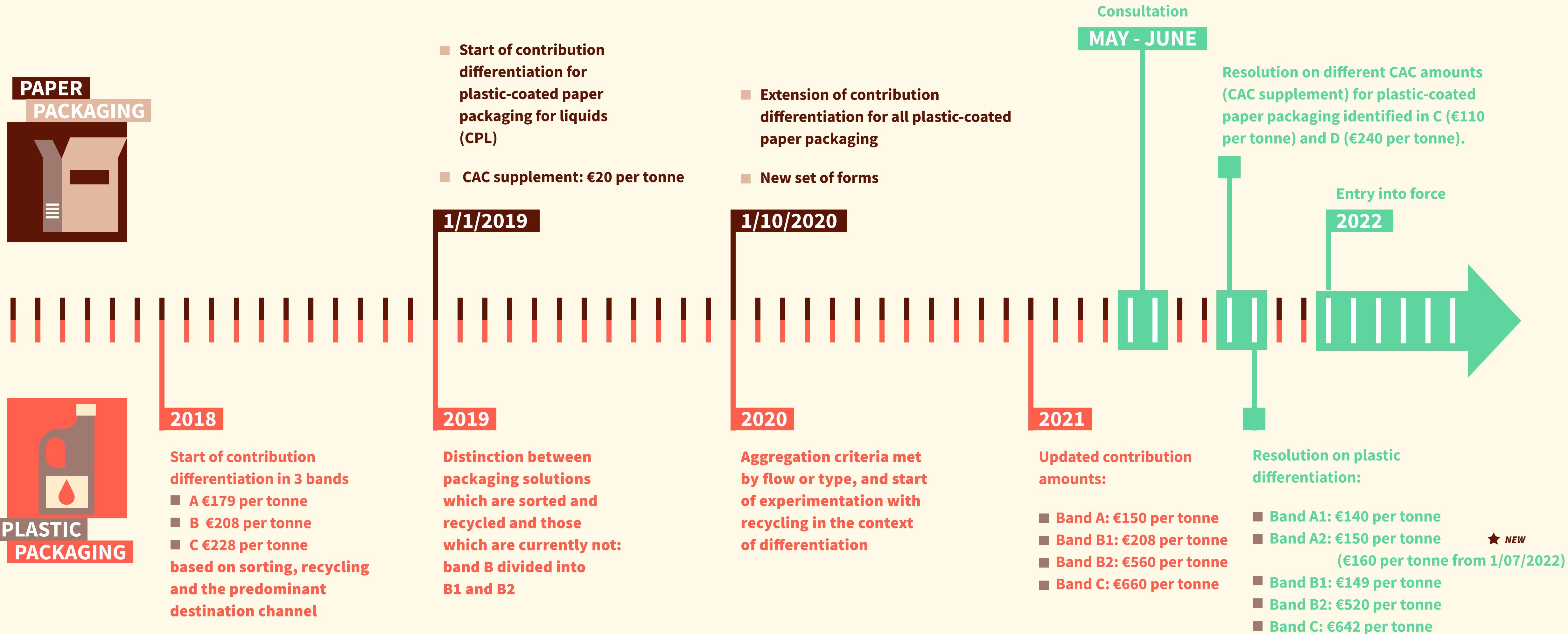
# CONAI ENVIRONMENTAL CONTRIBUTION (CAC)

Improved monitoring of changes to the value of the reference CAC, with the aim to **react more promptly to alter the contribution amounts based on evolutions in the background context**, in order to ensure that Material Consortia have the required resources to pay the fees relating to the ANCI-CONAI Framework agreement, and to cover additional costs for treating and managing the recycling and recovery of packaging waste.

In 2021 changes were made to the CAC unit values for certain materials. At this time of high volatility in the prices of secondary raw materials, **periodic checks are planned (approximately on a quarterly basis) to ensure the CAC values are appropriate to the relevant management costs.**

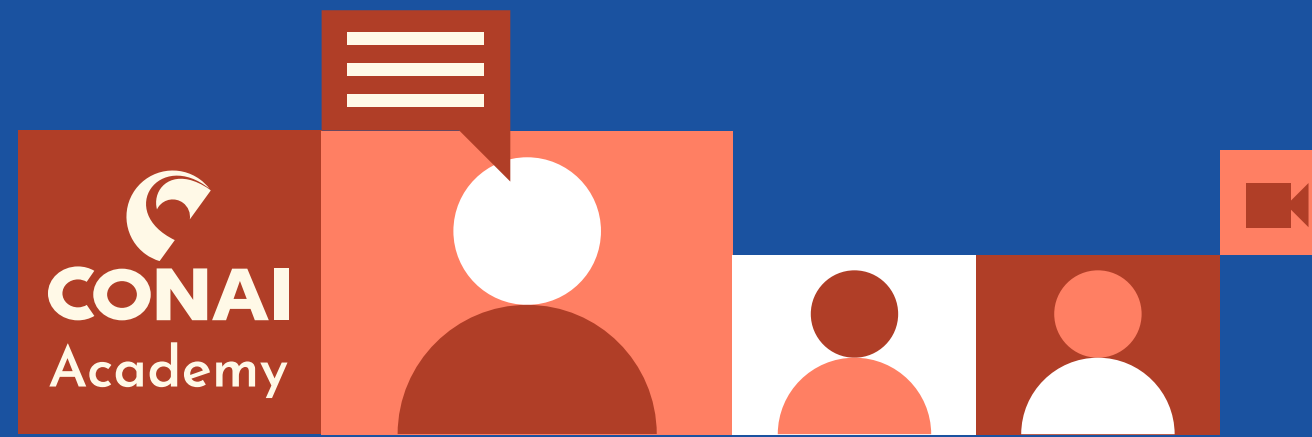


# CAC: EVOLUTION OF CONTRIBUTION DIFFERENTIATION



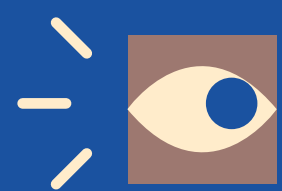


# COMMUNICATION



## CONAI Academy

Online platform for providing information and updates



**Single-Sign-On: one login for all CONAI platforms and websites (in progress)**

- **Webinar** for businesses
  - Creating a **community** with stakeholders
- 



## Media partnership

to promote topics that matter to businesses

- Corriere della Sera
  - La Repubblica
  - Il Sole 24 Ore
- 

## Attendance at fairs, events and exhibitions

- Meeting di Rimini
  - Ecomondo
- 

## Awareness-raising and education in schools with dedicated projects

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# COMMUNICATION / MEDIA RELATIONS

## PRESS OFFICE

Disseminating data and results, and consolidating CONAI's image as an interlocutor for packaging recycling/recovery, waste management at the national level, and environmental sustainability.

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## SOCIAL MEDIA

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## VOGUE TALENTS

**The Upcycling Challenge:** in partnership with Vogue to support creatives in sustainable fashion.

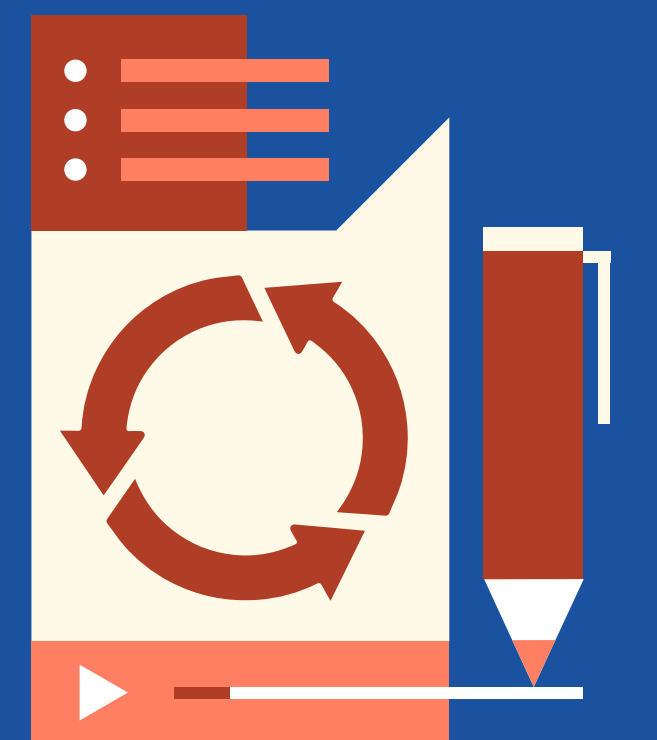
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## CONTEST FOR YOUNG ENVIRONMENTAL JOURNALISM

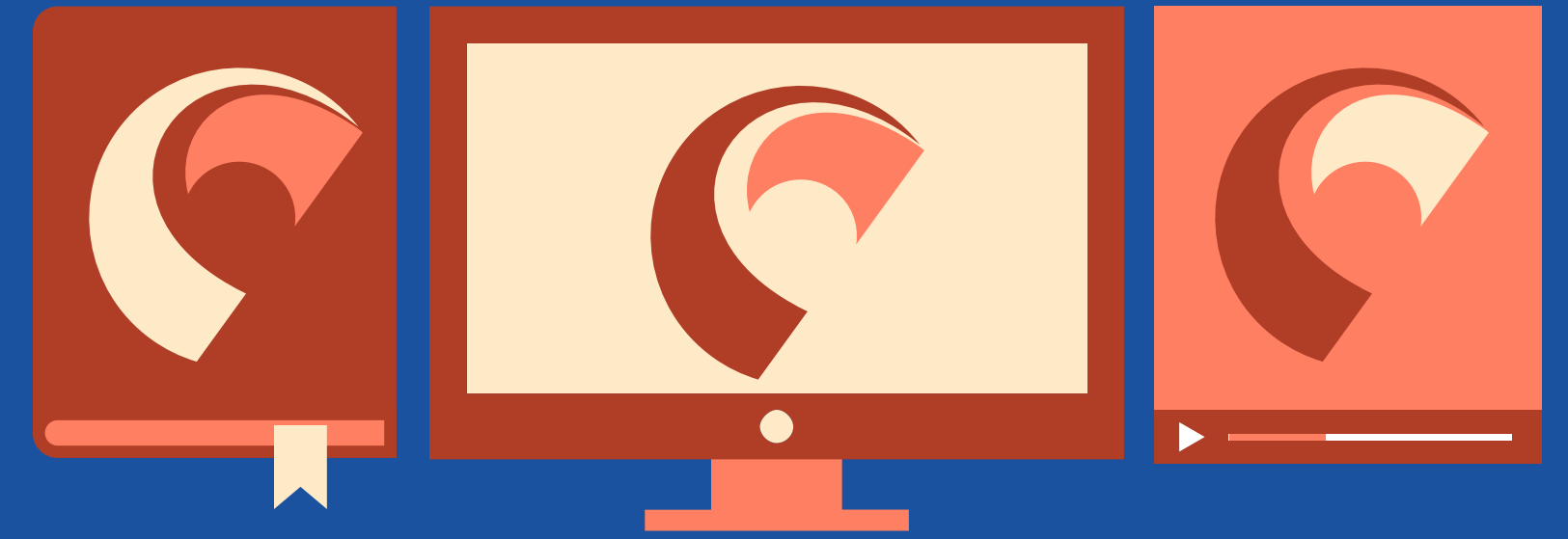
Awards for articles or radio/TV services focusing on the circular economy and recycling, for journalists under 40.

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# COMMUNICATION / CONAI 25

## Recognising 25 years of action



### “25” BOOK

To retrace the history and actions of CONAI and Italy’s progressive move towards sustainability and the circular economy.

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### A SCIENTIFIC MANUAL

Explaining through sustainability and circularity how CONAI has been – and will continue to be – a key player in the country’s future.

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### WEBSITE CUSTOMISATION

Graphics, special in-depth features and historical archive.

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### DOCUMENTARY

with CONAI catalogue/archive footage and interviews recorded for the occasion.

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**25th anniversary logo** and iconic **award** in partnership with PoliDesign in Milan.

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