



**Luca RUINI**

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# CONAI: WHO WE ARE AND WHAT WE DO

## THE FIRST EPR SYSTEM IN ITALY DEDICATED TO PACKAGING

CONAI – **Consorzio Nazionale Imballaggi** (National Packaging Consortium) – 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 targets.



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



**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.



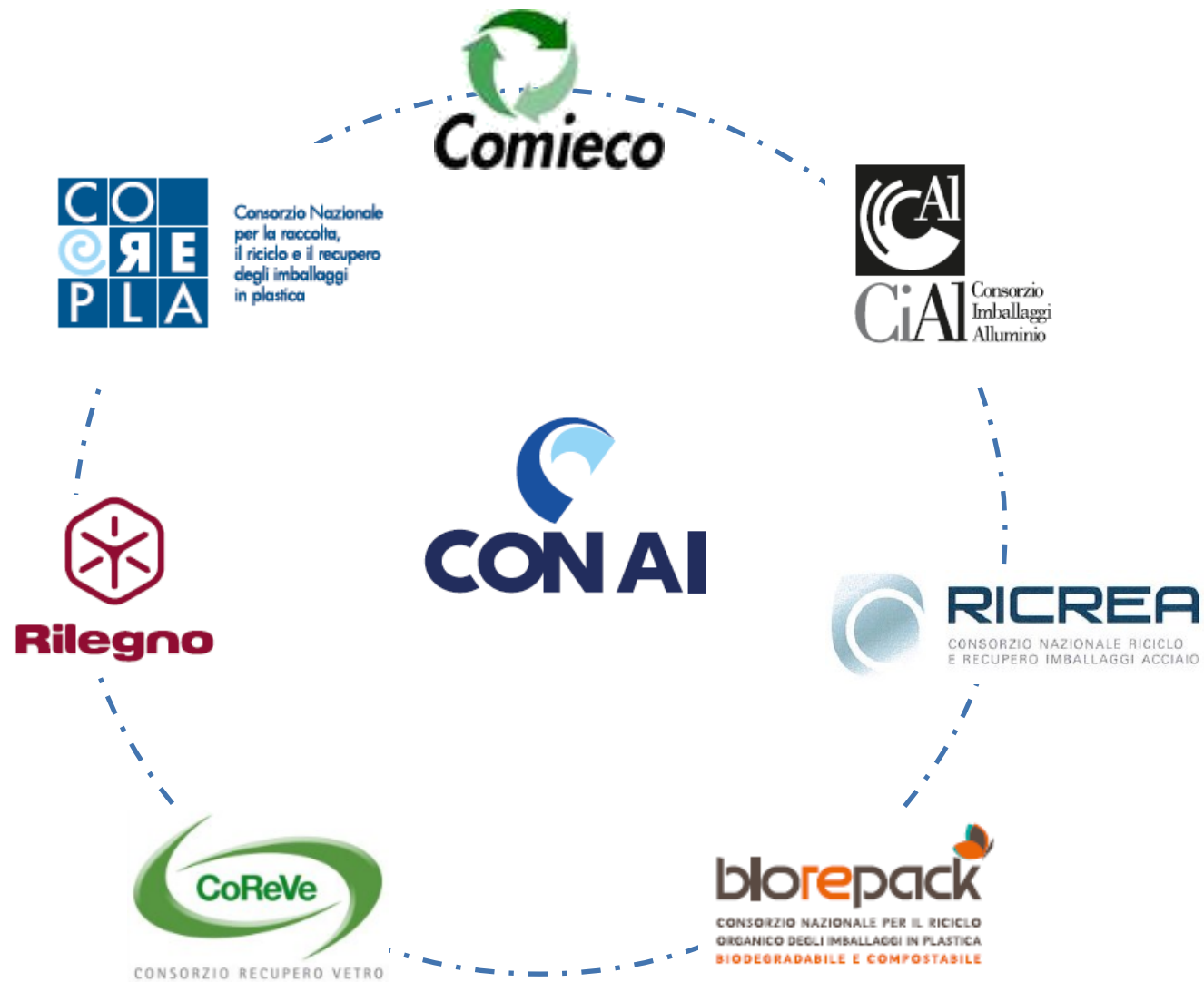
Set out a framework programme agreement at the national level with the Association of Italian Municipalities (ANCI), the Union of Italian Provinces (UPO) or with **local authorities**, to guarantee application of the principle of shared management responsibility between producers, users and public administrations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

## CONAI, Material Consortia & Autonomous Systems



**CONAI** oversee the activities of **7 Private & Non-Profit Material Consortia** to recycle/recover paper, aluminium, steel, plastic, glass and wood packaging materials separately collected by Municipalities according to the **subsidiarity principle to the market**

Currently **3 Autonomous Systems** are accredited to recycle **specific types of plastic packaging**

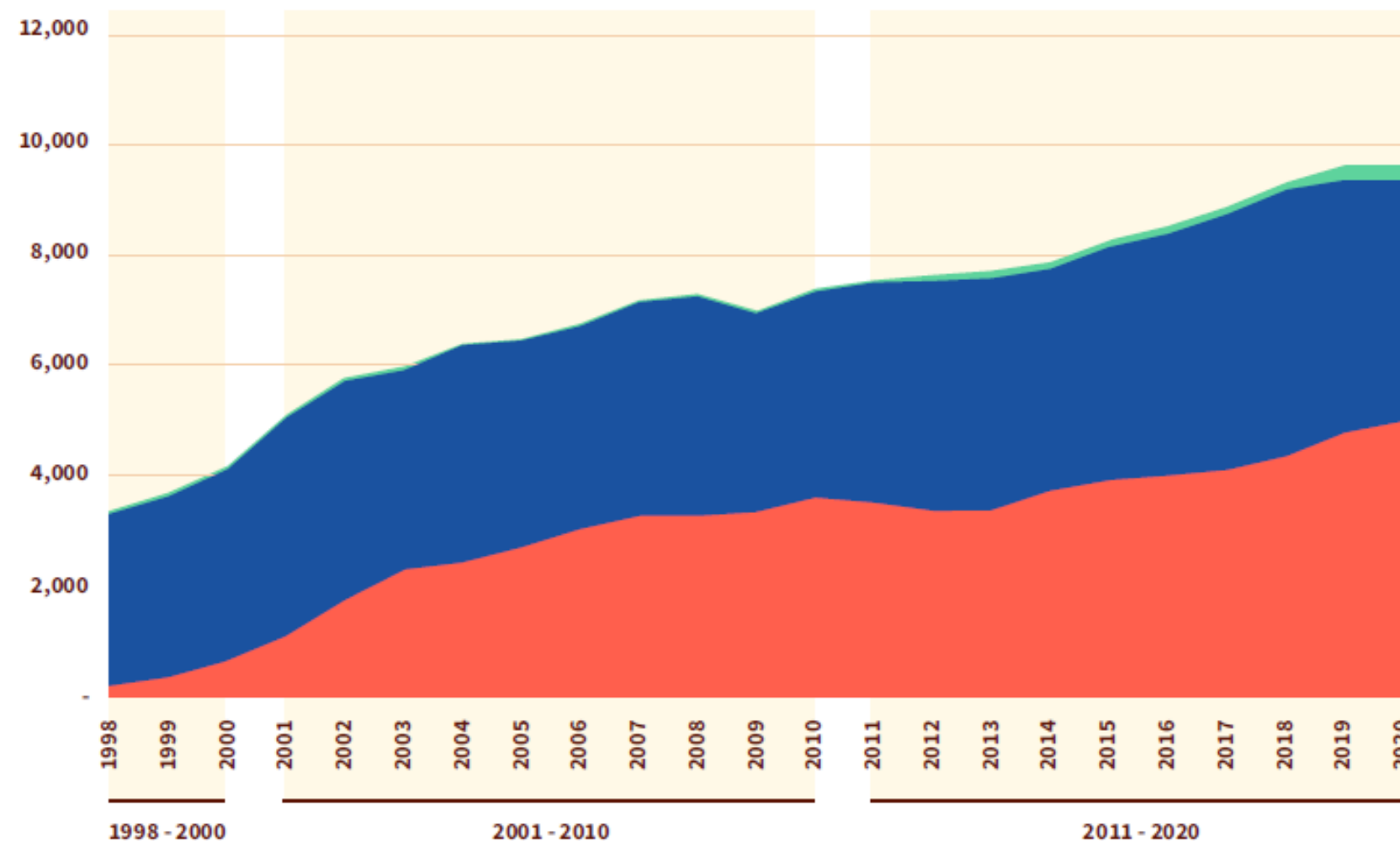


# CONAI System covers up to 52% of the Packaging Recycling Market Share

## CONTRIBUTION TO NATIONAL RECYCLING BY MATERIAL CONSORTIA, AUTONOMOUS SYSTEMS AND MARKET

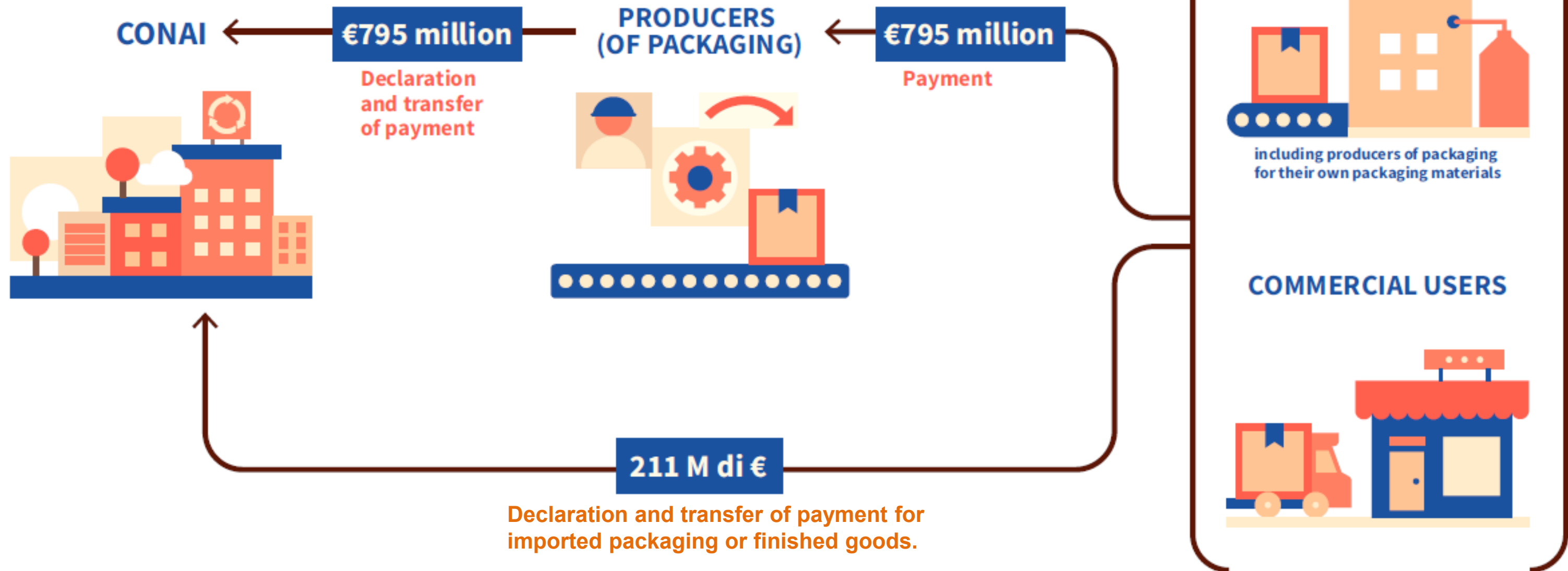
The **CONAI CONSORTIA System** acts on the market in a **SUBSIDIARY** manner where there is a lack of cost-effectiveness, ensuring there is free competition on the secondary raw materials market.

### SENT TO RECYCLING FOR PACKAGING WASTE MANAGEMENT



- **< 2%**  
**AUTONOMOUS SYSTEMS**  
 (CONIP-CORIPET-PARI)
- **46%**  
**INDEPENDENT OPERATORS**  
 (market) Decreasing due to lower secondary raw material prices compared to 2019
- **52%**  
**MATERIAL CONSORTIA**  
 Increasing due to subsidiarity and the rise in separate collection

# CONAI FEE is mainly paid by Industrial & Commercial Users when they buy packaging



**INDUSTRIAL USERS**



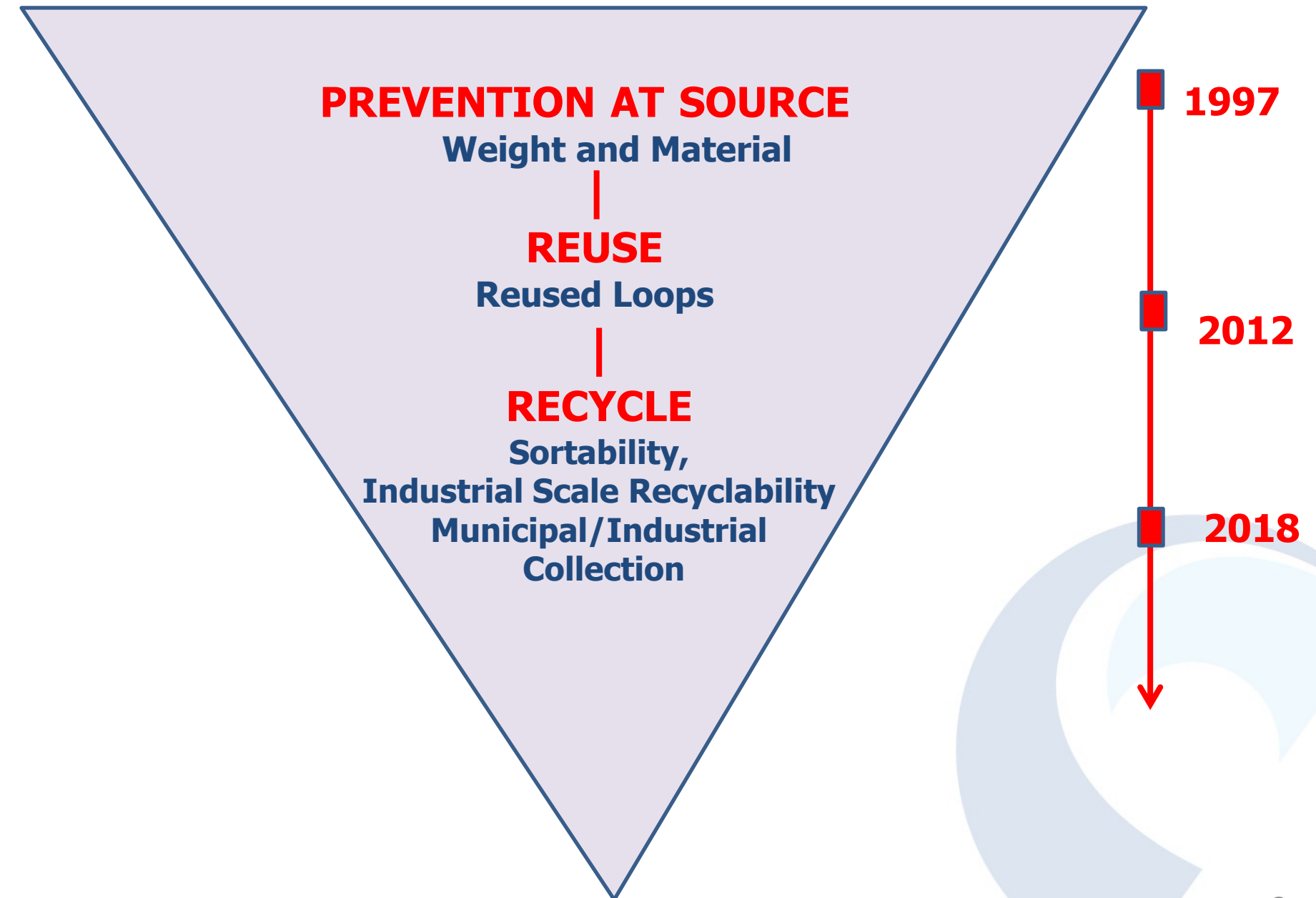
including producers of packaging for their own packaging materials

**COMMERCIAL USERS**



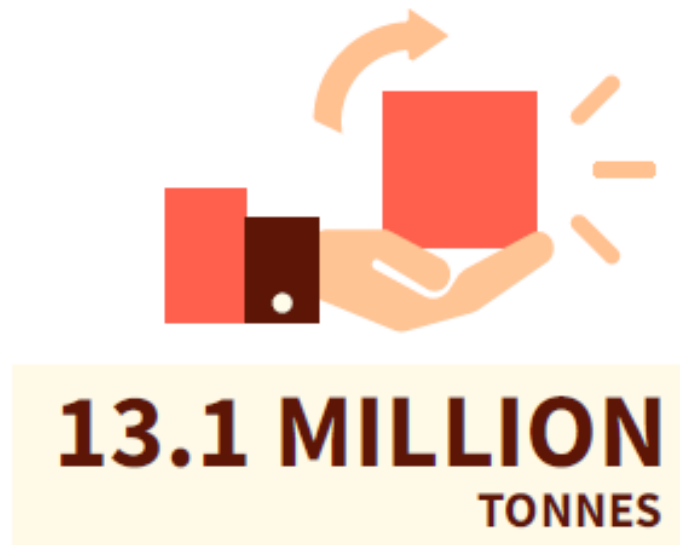
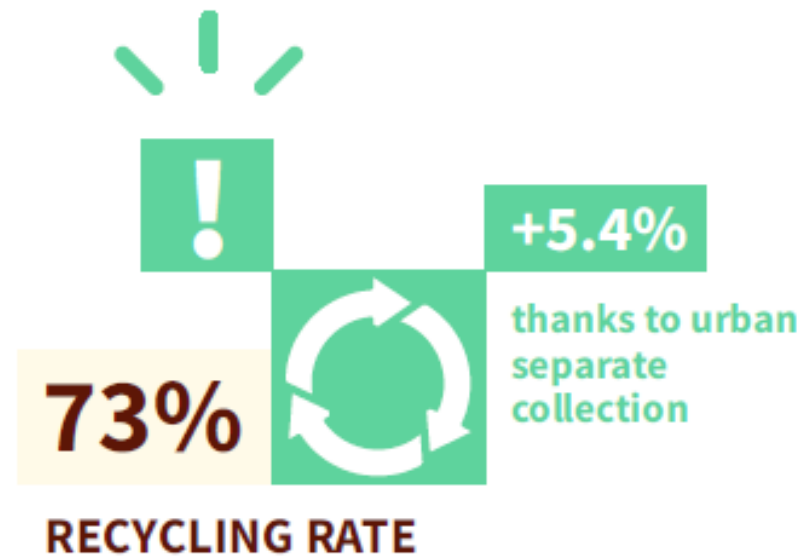
| CONAI FEE<br>2022 €/t | Till 30 June | Since 1° July |
|-----------------------|--------------|---------------|
| Aluminium             | 10           | 7             |
| Bioplastic            | 294          | 294           |
| Glass                 | 33           | 29            |
| <b>Paper</b>          |              |               |
| Level 1               | 10           | 5             |
| Level 2               | 30           | 25            |
| Level 3               | 120          | 115           |
| Level 4               | 250          | 245           |
| <b>Plastic</b>        |              |               |
| Level A1              | 104          | 60            |
| Level A2              | 150          | 150           |
| Level B1              | 149          | 20            |
| Level B2              | 520          | 410           |
| Level C               | 642          | 560           |
| Steel                 | 12           | 8             |
| Wood                  | 9            | 9             |

## CONAI FEE Modulated according Waste Hierarchy



# 2020 DATA

Stable recycling volumes and an increasing recycling rate driven by separate collection, despite the reduction in products placed on the market due to the measures adopted in the wake of the health crisis.



placed on the market **- 4.6%** compared to 2019



estimated to be sent for recycling **STABLE** compared to 2019



total recovery (recycling + energy recovery) **+3.3%** compared to 2019

# TRANSPARENCY AND OPEN DATA

In Europe there is a total of 44 PROs which operate in different packaging EPR schemes. In 2021, they were invited to take part in a survey to assess transparency and open data, but only 28 PROs decided to provide their feedback.

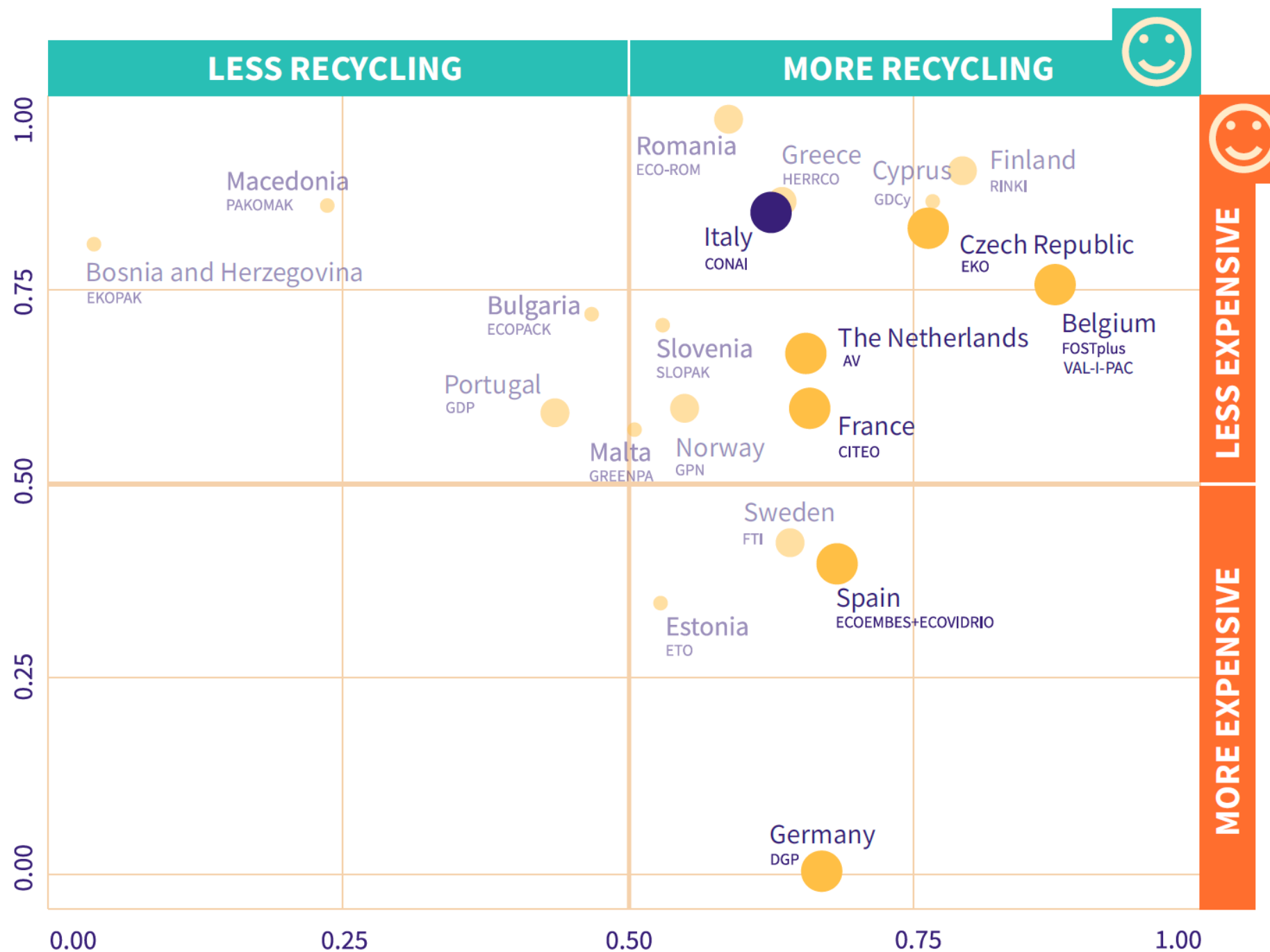
TABLE 1: SOURCES AVAILABILITY DETAILS

| COUNTRY                | PROs   | PROFIT / NON PROFIT | OPERATIONAL RESULTS | FEE | FINANCIAL REPORT | DETAILED COST-REVENUES |
|------------------------|--|---------------------|---------------------|-----|------------------|------------------------|
| Austria                | ARAPLUS  | NON PROFIT          | ✓                   | ✓   | ✓                | ✗                      |
| Belgium                | Fost-PLUS  | NON PROFIT          | ✓                   | ✓   | ✓                | ✗                      |
| Belgium                | VALIPAC  | NON PROFIT          | ✓                   | ✓   | ✓                | ✗                      |
| Bosnia and Herzegovina | EKOPAK   | NON PROFIT          | ✓                   | ✓   | ✗                | ✗                      |
| Bulgaria               | ECOPACK  | NON PROFIT          | ✓                   | ✓   | ✗                | ✗                      |
| Croatia                | EKO-OZRA*  | NON PROFIT          | ✗                   | ✓   | ✓                | ✗                      |
| Cyprus                 | GREEN DOT  | NON PROFIT          | ✓                   | ✓   | ✗                | ✗                      |
| Czech Republic         | EKO  | NON PROFIT          | ✓                   | ✓   | ✓                | ✓                      |
| Estonia                | ETO  | NON PROFIT          | ✓                   | ✓   | ✓                | ✗                      |
| Finland                | RINKI  | NON PROFIT          | ✓                   | ✓   | ✓                | ✗                      |
| France                 | CITEO  | NON PROFIT          | ✓                   | ✗   | ✓                | ✗                      |
| France                 | ADELPHE  | NON PROFIT          | ✓                   | ✗   | ✓                | ✗                      |
| Germany                | Der Grüne Punkt  | PROFIT              | ✗                   | ✓   | ✗                | ✗                      |
| Greece                 | HERRCO   | NON PROFIT          | ✓                   | ✓   | ✓                | ✗                      |
| Hungary                | OKO*   | NON PROFIT          | ✓                   | ✓   | ✗                | ✗                      |
| Iceland                | Icelandic Recycling Fund   | NON PROFIT          | ✗                   | ✓   | ✗                | ✗                      |
| Ireland                | REPAK LTD  | NON PROFIT          | ✗                   | ✓   | ✗                | ✗                      |
| Italy                  | CONAI  | NON PROFIT          | ✓                   | ✓   | ✓                | ✓                      |
| Latvia                 | JSC LATVIJAS ZAĻAIS PUNKTS   | NON PROFIT          | ✗                   | ✓   | ✓                | ✗                      |
| Lithuania              | VŠĮ ŽALIASIS TAŠKAS  | NON PROFIT          | ✓                   | ✓   | ✗                | ✗                      |
| Luxemburg              | VALORLUX   | NON PROFIT          | ✓                   | ✓   | ✗                | ✗                      |
| Macedonia              | PAKOMAK  | NON PROFIT          | ✓                   | ✓   | ✓                | ✗                      |
| Malta                  | GREENPAK   | NON PROFIT          | ✓                   | ✓   | ✗                | ✗                      |
| Netherlands            | AFVALFONDS VERPAKKINGEN  | NON PROFIT          | ✓                   | ✓   | ✗                | ✗                      |
| Norway                 | GP   | NON PROFIT          | ✓                   | ✓   | ✓                | ✗                      |
| Poland                 | REKOPOL  | PROFIT              | ✓                   | ✓   | ✓                | ✗                      |
| Portugal               | PONTO VERDE Portugal   | NON PROFIT          | ✓                   | ✓   | ✗                | ✗                      |
| Romania                | ECO-ROM  | NON PROFIT          | ✓                   | ✓   | ✓                | ✗                      |
| Serbia                 | SEKOPAK  | NON PROFIT          | ✗                   | ✓   | ✓                | ✗                      |
| Slovakia               | ENVI-PAK   | NON PROFIT          | ✓                   | ✗   | ✓                | ✗                      |
| Slovenia               | SLOPAK   | NON PROFIT          | ✓                   | ✓   | ✓                | ✗                      |
| Spain                  | ECOVIDRIO  | NON PROFIT          | ✓                   | ✓   | ✓                | ✗                      |
| Spain                  | ECOEMBES   | NON PROFIT          | ✓                   | ✓   | ✓                | ✗                      |
| Sweden                 | FTI  | NON PROFIT          | ✓                   | ✓   | ✓                | ✗                      |
| UK                     | VALPAK   | PROFIT              | ✓                   | ✓   | ✓                | ✗                      |
| Germany                | BellandVision GmbH   | PROFIT              | ✗                   | ✗   | ✗                | ✗                      |
| Germany                | INTERSEROH Dienstleistungs GmbH  | PROFIT              | ✗                   | ✗   | ✗                | ✗                      |
| Germany                | Landbell AG für Rückhol-Systeme  | PROFIT              | ✗                   | ✗   | ✗                | ✗                      |
| Germany                | NOVENTIZ Dual GmbH   | PROFIT              | ✗                   | ✗   | ✗                | ✗                      |
| Germany                | PreZero Dual GmbH  | PROFIT              | ✗                   | ✗   | ✗                | ✗                      |
| Germany                | Reclay Systems GmbH  | PROFIT              | ✗                   | ✗   | ✗                | ✗                      |
| Germany                | Veolia Umweltservice Dual GmbH   | PROFIT              | ✗                   | ✗   | ✗                | ✗                      |
| Germany                | Zentek GmbH & Co. KG   | PROFIT              | ✗                   | ✗   | ✗                | ✗                      |
| Turkey                 | ÇEVKO Environmental Protection and Packaging Waste Recovery and Recycling Foundation | NON PROFIT          | ✗                   | ✗   | ✗                | ✗                      |

LEGEND: ✗ no, ✓ partial, ✓ yes

\* Not yet PROs, but "Tax Compliant Services Company" to support producers.

## GRAPH 7 : MOST POPULOUS EU PROS PERFORMANCE AVERAGE OF ALL PACKAGING MATERIALS (ECONOMIC EFFICIENCY AND RECYCLING EFFECTIVENESS INDICATOR)







## Packaging EPR FEE in UE

What are the  
differences?

May 2022







## Packaging EU EPR Organisations

Operational  
Responsibility Level

What are  
the differences?





May 2022

## FEES' VALUES PER PACKAGING SOLUTION (2022)

| Countries      | Main Pro         | Value of the FEE in € cent.   |   |   |   |
|----------------|------------------|---|---|---|---|
|                |                  |  |  |  |  |
| Slovenia       | SLOPAK           | 0,78  | 0,28  | <u>0,01</u>   | <u>0,30</u>   |
| UK *           | VALPAK           | 0,72  | 0,06  | 0,23  | 0,98  |
| Italy *        | CONAI            | 0,70  | <u>0,02</u>   | 0,22  | 1,59  |
| Luxembourg     | VALORLUX         | 1,06  | 0,08  | 1,01  | 1,11  |
| Portugal       | SPV              | 0,81  | 0,08  | 2,17  | 0,92  |
| Belgium        | FOST PLUS        | 0,50  | 0,07  | 2,24  | 2,38  |
| Spain *        | ECOEMBES         | 1,83  | 0,18  | 2,02  | 1,77  |
| Netherlands    | AFVALFONDS (SAV) | 3,03  | 0,26  | 0,49  | 2,31  |
| France *       | CITEO            | 1,57  | 0,27  | 3,73  | 0,87  |
| Bulgaria       | ECOPACK          | <u>0,38</u>   | 0,07  | 1,82  | 4,54  |
| Finland        | RINKI            | 0,76  | 0,19  | 1,62  | 4,71  |
| Romania        | ECO-ROM          | 0,60  | 0,23  | 1,75  | 4,71  |
| Estonia        | ETO              | 1,72  | 0,41  | 2,33  | 4,91  |
| Austria        | ARA              | 3,00  | 0,50  | 2,66  | 4,20  |
| Germany *      | GRUNE PUNKT      | <u>3,31</u>   | 1,16  | 3,97  | 2,73  |
| Czech Republic | EKO-COM          | 2,03  | 0,29  | 3,61  | <u>5,56</u>   |
| Sweden         | FTI              | 2,32  | <u>1,28</u>   | <u>4,97</u>   | 3,65  |

**Lowest FEE**  
**Bulgaria** for Plastic  
**Italy** for **Aluminium**  
**Slovenia** for Paper & Glass

**Italy new CONAI FEE**  
 From 1<sup>st</sup> July 2022  
**Lowest for 2 of 4 Pack Solution**

|         | Value of the FEE in € cent.   |   |   |   |
|---------|---|---|---|---|
|         |  |  |  |  |
| CONAI   |   |   |   |   |
| Italy * | 0,16  | 0,01  | 0,11  | 1,39  |

## AGGREGATE FEE INDICATOR (2022)

| Countries      | Main Pro         | Aggregate FEE indicator (€ cent.) |
|----------------|------------------|-----------------------------------|
| Slovenia       | SLOPAK           | 1,4                               |
| UK *           | VALPAK           | 2                                 |
| Italy *        | CONAI            | 2,5                               |
| Luxembourg     | VALORLUX         | 3,3                               |
| Portugal       | SPV              | 4                                 |
| Belgium        | FOST PLUS        | 5,2                               |
| Spain *        | ECOEMBES         | 5,8                               |
| Netherlands    | AFVALFONDS (SAV) | 6,1                               |
| France *       | CITEO            | 6,4                               |
| Bulgaria       | ECOPACK          | 6,8                               |
| Finland        | RINKI            | 7,3                               |
| Romania        | ECO-ROM          | 7,3                               |
| Estonia        | ETO              | 9,4                               |
| Austria        | ARA              | 10,4                              |
| Germany *      | GRUNE PUNKT      | 11,2                              |
| Czech Republic | EKO-COM          | 11,5                              |
| Sweden         | FTI              | 12,2                              |

### Lowest Aggregate FEE

Adding up the 4 Pack Solution FEE

**1,4** € cent **Slovenia**

**2** € cent **United Kingdom**

**2,5** € cent **Italy (1,7 by 1<sup>st</sup> July)**

### Highest Aggregate FEE

Adding up the 4 Pack Solution FEE

**12,2** € cent **Sweden**

**11,5** € cent **Czech Republic**

**11,2** € cent **Germany**

[\*] Countries with a population of more than 20 million.

## DELTA 2021 VS 2022 OF THE AGGREGATE FEE INDICATORS

| Countries      | Main Pro         | Aggregate FEE indicator 2021 (€ cent.) | Trend 2022 |
|----------------|------------------|--|------------|
| Slovenia       | SLOPAK           | 2,4                                    | -42,0%     |
| Italy *        | CONAI            | 4,0                                    | -36,2%     |
| UK *           | VALPAK           | 2,6                                    | -24,7%     |
| Portugal       | SPV              | 5,1                                    | -22,8%     |
| Luxembourg     | VALORLUX         | 4,1                                    | -20,8%     |
| Belgium        | FOST PLUS        | 6,0                                    | -13,1%     |
| Germany *      | GRUNE PUNKT      | 12,1                                   | -7,8%      |
| Finland        | RINKI            | 7,5                                    | -2,9%      |
| Romania        | ECO-ROM          | 7,5                                    | -2,8%      |
| Netherlands    | AFVALFONDS (SAV) | 6,2                                    | -1,0%      |
| Estonia        | ETO              | 9,4                                    | 0,1%       |
| Sweden         | FTI              | 12,2                                   | 0,2%       |
| Bulgaria       | ECOPACK          | 6,8                                    | +0,4%      |
| Austria        | ARA              | 10,3                                   | +1,1%      |
| France *       | CITEO            | 6,3                                    | +2,2%      |
| Spain *        | ECOEMBES         | 5,7                                    | +2,5%      |
| Czech Republic | EKO-COM          | 10,0                                   | +15,5%     |

Aggregate FEE Indicator **decreases** in **10 out of 17** Countries from last year

**Delta 2021/22 Aggregate FEE Decreased significantly**

**-42 % Slovenia**

**-36 % Italy (- 57% since 1<sup>st</sup> July)**

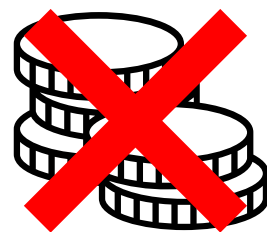
**-25 % UK**

**-23 % Portugal**

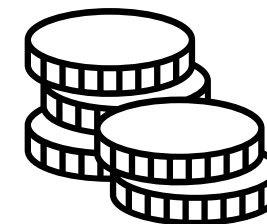
**-21 % Luxembourg**

## The FEEs' amount is influenced by the Profit or No Profit nature of the PRO

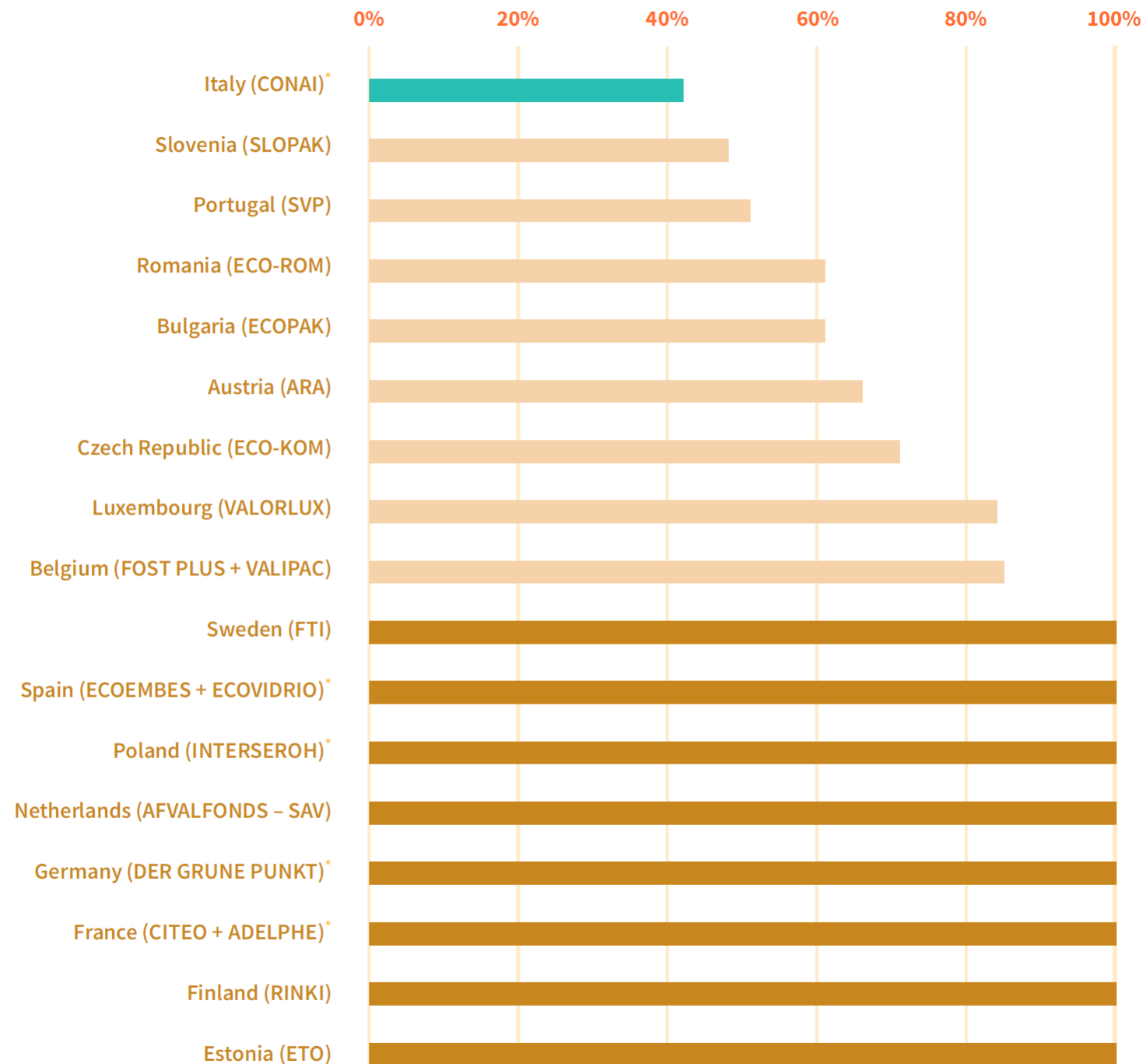
In **No Profits PROs**, the amount of FEE covers the recycling and organisation management net costs



In **Profits PROs**, the amount of the fee covers the full service cost, gross of economic benefits of recycling.



# MAIN PRO'S MARKET SHARE IN EU, OPERATIONAL RESPONSIBILITY IN PERCENTAGE



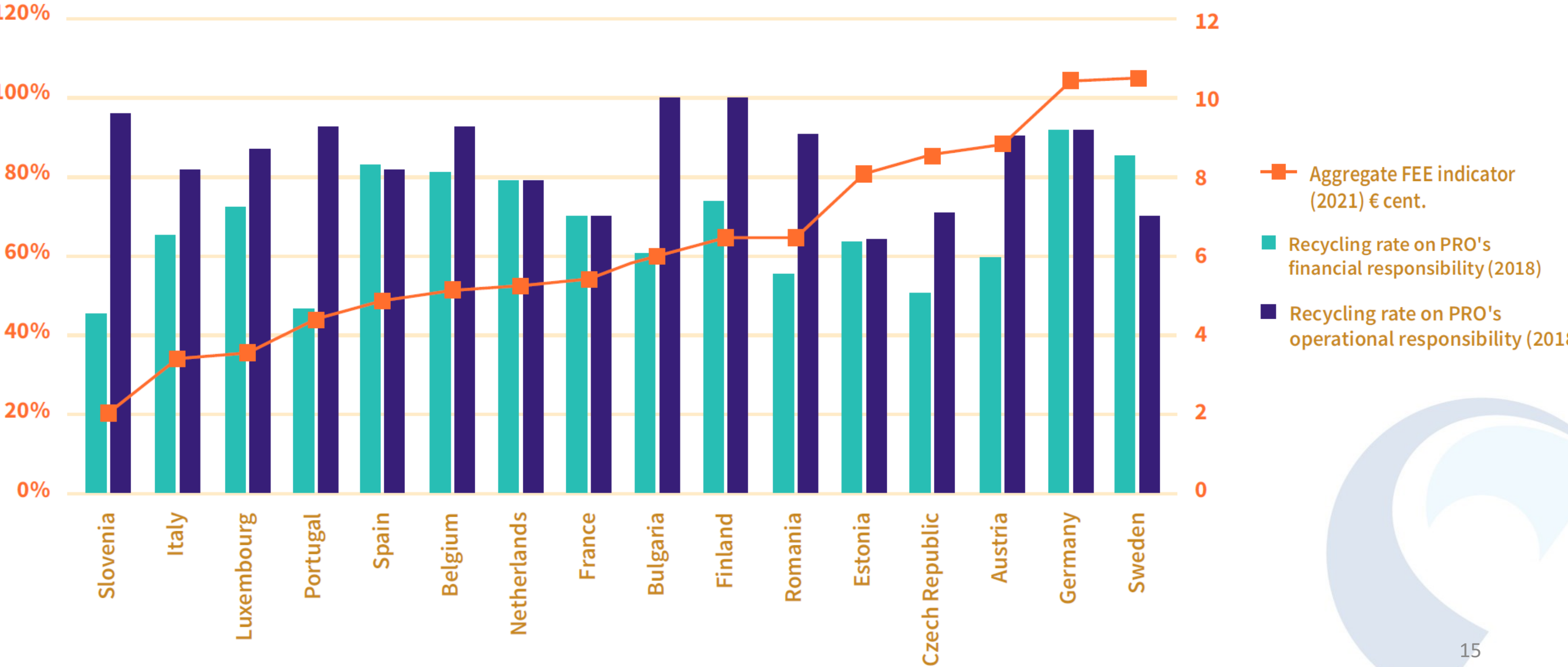
## PROs Market Shares in EU

The **CONAI's System Market Share** of Packaging Material Recycling is the **LOWEST** among the **EU PROs**

(2018 data)

[\*] Countries with a population over 20 million inhabitants.

# Higher FEE value does NOT necessarily correspond to higher Recycling Rate





**CONAI**  
**Consorzio Nazionale Imballaggi**

Via Pompeo Litta, 5 - 20122 Milano  
Tel 02.540441 - Fax 02.54122648

*[www.conai.org](http://www.conai.org)*

