



GreenCape

**The SA
Plastics
Pact**



CASE STUDY



South African Plastics Pact Flexible Packaging Solutions Showcase



About this report

This report was prepared by GreenCape, as the secretariat of the South African Plastics Pact, with funding provided by the Anglo American Foundation.



Main insights

There are opportunities for brand owners and retailers to collaborate with local converters on packaging solutions that maintain the **form and function of current flexible packaging** while being **recyclable in South Africa**.

Such changes could drive higher recycling rates, support the SA Plastics Pact targets, and ensure compliance with Extended Producer Responsibility (EPR) regulations.

However, barriers to uptake remain, including technical challenges, training needs, infrastructure gaps, and achieving the economies of scale necessary for making recyclable flexible packaging cost-competitive in South Africa.

The SA Plastics Pact offers a valuable platform to connect stakeholders, fostering collaboration to address these barriers and advance the circularity of flexible plastic packaging in South Africa over time.





Background

The South African Plastics Pact is a collaborative group of organisations working towards a South Africa where plastic is valued and retained in a circular economy, with benefits of **job creation, economic growth, and the prevention of plastic pollution in the environment.**

Plastics Pact members have committed to four ambitious targets for 2025, each designed to tackle a different component of the plastic packaging value chain. Collectively, the aim is for these targets to bring South Africa closer to a functional circular economy for plastic packaging.



Target 1: Taking action on problematic and unnecessary plastic



Target 2: 100% of plastic packaging to be reusable, recyclable or compostable



Target 3: A minimum of 70% of plastic packaging effectively recycled



Target 4: A minimum of 30% recycled content across all plastic packaging

Certain types of flexible plastic packaging are not recyclable in South Africa, and represent a barrier for member companies to make progress toward the SA Plastics Pact targets. GreenCape, in partnership with the [Anglo American Foundation](#), hosted the Flexible Packaging Solutions Showcase aimed at identifying alternatives to problematic flexible packaging. The event involved selected packaging manufacturers presenting their market-ready solutions to SA Plastics Pact members and supporting stakeholders across the value chain. Attendees included leading business members such as Berry Astrapak, Clicks Group, Heineken, Myplas, Mpact, Naspers, PepsiCo, Pick n Pay, Safripol, Sasol, Spar, Spur Corporation, Tiger Brands, Unilever, Woolworths and additional supporting members.

Identifying alternatives for problematic flexible packaging is a key opportunity to advance SA Plastics Pact targets, boost recycling rates in South Africa, and comply with EPR regulations.

The event aimed to raise awareness among brand owners and retailers about solutions that are already available and provide packaging manufacturers with access to the brand owners and retailers interested in introducing these solutions.

The SA Plastics Pact is also part of the [Global Plastics Pact Network](#), which operates in 18 countries—including Canada, Chile, Colombia, France, India, Kenya, Poland, Portugal, the United Kingdom, the United States, Australia, New Zealand, and the Pacific Island Nations meaning potential solutions can be shared globally, amplifying their impact.



The challenge

The Flexible Packaging Solutions Showcase was centred on flexible polypropylene (PP) and flexible multilayer/multi-polymer packaging. Flexible PP is widely used for food packaging due to its clarity and moisture resistance, which helps to preserve product quality.

Its versatility makes it suitable for items such as stationery, personal care products, fruits, vegetables, baked goods, chocolates, sweets, and snacks. However, recycling rates for flexible PP in South Africa remain very low, partly due to the small market size. The limited economy of scale makes it challenging to achieve separation into suitable grades necessary for effective recycling.

Multilayer multi-polymer structures, on the other hand, are designed to enhance barrier performance—providing protection against oxygen, moisture, and UV exposure. These are commonly used for products such as cheese, cold meats, cereals, fresh soups, and certain snacks. Multilayer films are popular due to good mechanical properties and stability in sealing.

However, the incompatible polymers in these structures make them unsuitable for mechanical recycling. Consequently, they are often downcycled into lower-value products like plastic 'wood' or composite materials for construction.

These flexible packaging items accounted for approximately 35 000 tonnes of packaging placed on the market by SA Plastics Pact members in 2023, and implementing suitable alternatives will result in making significant progress toward target 2.



Selection process

Since the launch of the SA Plastics Pact in 2020, multilayer, multi-material flexible plastic packaging has remained a persistent challenge. To address this, a Flexibles Action Group was established in May 2022 to support members in implementing packaging design changes that improve recyclability.

With support from the Anglo American Foundation, GreenCape had an opportunity to expand the SA Plastics Pact's efforts by organising a showcase event to bring converters, retailers, and brand owners together to address this challenge collaboratively. The event facilitated greater engagement by providing attendees opportunities for direct matchmaking, for both in-person and virtual attendees, fostering deeper collaboration and engagement.

GreenCape issued a call for entries to stakeholders in South Africa and through our international networks. This call was opened at the start of July 2024 and ran until the 15th of August 2024. Entry was open for packaging manufacturers with a presence in South Africa, but also global companies offering solutions available locally. Entrants were invited to submit proposals addressing solutions for problematic flexible packaging, including PP and multilayer multipolymer packaging. Submissions required detailed technical information about the proposed solutions, including test results, product availability in the South African market, and evidence of recyclability testing (either locally or internationally). Entrants were also asked to provide recyclability certificates where applicable.

The preferred solutions were options that could be collected with adequately recycled materials in South Africa (i.e. recycled at a greater than 30% input recycling rate). Finalists were then selected to present their solutions at the showcase event held in Johannesburg, either in person or online. Six entrants participated, showcasing solutions for applications such as homeware and food packaging. These solutions included recyclable polyethylene alternatives for vacuum bags, shrink bags, thermoforms, flow wrapping, pouches, and other flexible packaging types. Mono-material polyethylene flexibles are widely collected for recycling in South Africa. The detailed submissions, presentations, and contact information of the finalists were shared with SA Plastics Pact member companies to facilitate further engagement.

The following diagram shows the process that was followed:





Barriers and opportunities

Even though there are suitable options available, there are specific barriers preventing the uptake of recyclable flexible packaging in the South African market, but there are also opportunities for converters and local packaging manufacturers to offer **solutions that brand owners and retailers are looking for to meet their sustainability goals.**



BARRIERS

- **Imported packaging:** Difficult to compete against imported alternatives, manufactured at greater quantities and lower costs
- **Conversion and filling:** Cost of upgrading conversion and filling lines
- **Training and capacity building:** Lack of good maintenance practice and lack of good quality controls



OPPORTUNITIES

- **Growing local market:** Opportunity to increase market share locally
- **Import replacement:** Finished products (Printed packaging)
- **Import replacement:** Intermediate products (to be used in creating final product, clear film)

For the introduction of multilayer monomaterial polyethylene alternatives, converters currently do not have sufficient local demand to justify dedicated lines to produce the alternative materials. This means that converters have to switch between different materials on the same lines, which means there needs to be re-optimisation whenever the switch is made. This reduces output, and can increase wastage. It is also critical to conduct regular maintenance for PE multilayers, more frequently than is currently needed for PET/PE multilayers. These same challenges apply when there are co-packers, as the converters generally do not have a direct line of communication between with the the co-packers. Training is also a challenge and often operators on filling lines are insufficiently training to run polyethylene flexibles, especially as there needs to be optimisation of the line when material is switched.

Another challenge is the investment required in new plants, that will need to run at full production consistently to justify the investments, and this will need a consistent demand for the materials.

Beyond these challenges there are opportunities to grow local production, and compete with imports. Over time, with EPR opening up greater opportunities for recycling and collection, and with brand owners and retailers increasingly working towards sustainability goals and Plastics Pact targets, the opportunities to introduce suitable and recyclable alternative flexible packaging in South Africa will expand.



Way forward

The South African Plastics Pact provides a unique platform to work collaboratively to overcome some of these barriers, and explore suitable opportunities. Insights from this engagement were further explored at the SA Plastics Pact Member Conference in November 2024.

Several Pact members are expected to engage directly with converters to discuss the implementation of the solutions that were presented. Once implemented, these changes could shift certain problematic plastic materials into higher recycling rates. The SA Plastics Pact Flexibles Action Group will continue working with members to share information on alternative solutions and available material types.



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