RE USE FOUNDATION

THE 2030 PLASTICS AGENDA: WHAT IT GETS RIGHT, AND WHERE IT COULD GO FURTHER



An independent review of the Ellen MacArthur Foundation's 2030 Plastics Agenda for Business, set against the results of the Global Commitment it succeeds

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WHY WE'RE WRITING THIS

The Ellen MacArthur Foundation has done more to put circularity on the global agenda than any other organisation.

Its 2018 Global Commitment brought together more than 1,200 organisations, including many of the world's largest consumer goods companies, around a shared framework for tackling plastic packaging waste, at a time when no binding international agreement existed, and none was close

This is a landmark achievement.

REUSE Foundation exists because we believe reuse is the most powerful approach available for cutting plastic packaging waste. We've followed the Global Commitment results closely, and we've read the 2030 Plastics Agenda that succeeds it with real interest — and real hope.

This review sets out what the data shows, what we think the 2030 Agenda gets right, and where we believe it could go further — and why.

That matters more than ever right now. Following the collapse of the UN plastics treaty talks (INC-5.2, Geneva, August 2025), the 2030 Agenda is likely to become the primary global reference point for tracking progress on plastic packaging for years to come. A framework carrying that much weight deserves a close, constructive look.



THE GLOBAL COMMITMENT WAS A LANDMARK ACHIEVEMENT

At the time of its 2018 launch, the EU's single-use plastics rules were still being drafted, and a draft UN plastics treaty was still years away.

Into that gap, EMF and the UN Environment Programme built the Global Commitment: over 500 organisations at launch, eventually with more than 1,200 organisations, agreeing to shared definitions, shared numbers, and a public progress report every year.

The scale of this achievement matters. Companies representing roughly 20% of the global plastic packaging market signed on. For a voluntary scheme with no legal force behind it, that was significant — and for the first time, signatories agreed to be measured against the same numbers, in public, every year, whatever the results turned out to be[1].

That transparency is valuable and makes external analysis possible.



[1] Some signatories were less disclosive than others, choosing to share their data, or some of their data, with EMF only, although their data would have contributed to the meta data

WHAT EIGHT YEARS OF DATA TELL US

How it worked

Signatories each set their own targets within five shared goal areas:

1. eliminating unnecessary or problematic plastic packaging
2. shifting from single-use towards reuse where it made sense
3. making 100% of packaging reusable, recyclable, or compostable
4. increasing post-consumer recycled (PCR) content and
5. cutting virgin plastic use in absolute terms.

EMF compiled signatory data into an annual progress report each autumn, on a one-year lag[2].



[2] EMF states that signatory progress information "has not been audited or verified by the Foundation or UN Environment Programme (UNEP)" and that each signatory is responsible for what it submits.

How it performed

The clearest way to read the results is against what signatories themselves promised in 2018:

- **Virgin plastic use:** an 18% reduction (against a baseline year defined by the signatory) was targeted; 6% was achieved. Over the same period, the wider non-signatory market — which made no comparable promise — increased virgin plastic use by 13%.
- **Recycled content (PCR):** a 26% share was targeted; 15.9% was achieved, up from 4.2% in 2018 — more than a threefold increase, but still 10 percentage points short of the goal.
- **Reusable, recyclable, or compostable packaging:** 100% was targeted; roughly 70% was achieved, with the aggregate figure dipping slightly in at least one reporting year.
- **Reuse:** no aggregate target was set, but the direction of travel was meant to be a clear shift away from single-use. Among brand and retailer signatories, the reusable-packaging share actually fell, from 1.5% in 2019 to 1.2% in 2024.
- **Individual results varied widely:** Unilever's virgin plastic use fell 23% against its own 50% target; Nestlé and L'Oréal each achieved 21% against 33% targets; Mondelēz achieved 5%. Among the 10 largest consumer goods signatories by revenue, four — Kellogg, Mars, PepsiCo and Coca-Cola — reported increases in virgin plastic use rather than the decreases they had targeted.

However, some signatories did better than the average.

SC Johnson cut virgin plastic use by 33% against a 30% target — one of the very few to beat its own goal. A handful of signatories pushed their 2025 targets out to 2030 rather than report a miss, and three — Tupperware, Sidel and El Corte Inglés — left the Global Commitment altogether rather than continue mandatory reporting.

In summary: while some progress was made, for the most part results fell significantly short on every metric signatories set for themselves in 2018. This is an important finding for a successor agreement to sit alongside, and we think readers deserve to see it clearly.

How the results are framed

EMF's headline figures for the Global Commitment are accurate at face value, but lack context.

We believe those figures should sit alongside the full target-versus-outcome picture.

Three examples illustrate our perspective:

- **EMF reports that the Global Commitment "avoided 14 million tonnes of virgin plastic."** This is a comparison against a modelled business-as-usual baseline, rather than against the commitments signatories actually made. Set against the 18% target, the real reduction achieved was 6%.
- **EMF reports that signatories "tripled recycled content."** That's true — recycled content rose from 4.2% to 15.9% — and it sits alongside a 26% target, meaning signatories delivered just over half of the promised increase.
- **EMF reports that signatories "outperformed the market across nearly all target areas."** This is also true, but the signatory group is measured against a market comprising companies that made no comparable commitment. Most named signatories, including some of the largest, still fell short of their own 2018 goals[3].

None of this means the reported figures are wrong. It means there's a version of this reporting that would build more trust: one where every headline achievement is paired with the target it's measured against.

REUSE Foundation encourages EMF to make that pairing standard practice going into the 2030 Agenda — it would strengthen the credibility this initiative has worked hard to build.

[3] Not only are the outperforming signatories being compared with the group of companies that made no comparable commitment, but the signatories were also likely to have been the businesses most confident in 2018 of hitting these targets.

WHY THE 2030 AGENDA MATTERS SO MUCH RIGHT NOW

The 2030 Plastics Agenda for Business was published in November 2025, three months after UN talks on a legally binding global plastics treaty collapsed in Geneva (INC-5.2, August 2025).

More than 100 countries had backed binding limits on virgin plastic production; a smaller group of oil and gas-producing states opposed those limits and argued the treaty should focus on recycling, reuse, and redesign instead. No date has been set to resume talks.

With no binding treaty in force and regulation still patchy country to country, the 2030 Plastics Agenda is one of the few common reference points the world has — and it's likely to be relied on by companies, policymakers and journalists tracking where the industry stands.

That's why it's worth getting right, and why we think it deserves a close, constructive read.



DOES THE 2030 AGENDA BACK WHAT THE EVIDENCE SAYS WORKS?

The 2030 Agenda organises its plans around three challenges it says no business can solve alone: scaling reuse, tackling flexible packaging waste, and building better collection and recycling infrastructure. Here's what's proposed for each, and how it lines up against the evidence.

Reuse

What's proposed: individually, businesses are asked to *"create the conditions for reuse to scale*". Collectively, they're asked to "join at-scale demonstrators". As a group, they're asked to *"align and advocate for effective policies".* None of these carries a number, a deadline, or a funding pledge — responsibility for scaling reuse sits mainly with governments and collective action rather than with individual businesses.

EMF's own supported research points the other way. The report "Breaking the Plastic Wave" (Pew Charitable Trusts and Systemiq, 2020, supported by EMF) called for a credible roadmap to address plastic waste. Its 2025 update found that plastic packaging pollution *"can be nearly eradicated by 2040",* with reuse accounting for two-thirds of that reduction. Reuse is the area the evidence says matters most — and currently the area with the least concrete backing behind it.

We want to see that rebalanced.

Some large signatories are showing what's possible without waiting for policy to catch up. SC Johnson scaled its Ecover refill stations to more than 600 across the UK, helping it hit its 2025 virgin plastic target a year early. L'Oréal has built dedicated refill manufacturing capacity across four sites and grown its refillable product range nearly fourfold since 2019.

These examples prove reuse can work at scale — which makes it all the more compelling to imagine what the 2030 Agenda could unlock if reuse sat at its centre rather than its edge.

Flexible packaging

What's proposed: businesses are asked to "*align on a common vision"* for flexible packaging, "*champion*" that vision, and "*share R&D efforts*" on new materials, "*where relevant"*. No specific material, numeric target, or date is named.

Flexible packaging — pouches, films, and multi-layer laminates — is both the fastest-growing packaging category and the hardest to recycle at scale, a point the 2030 Agenda itself acknowledges. The most commonly proposed industry solution here is chemical, or "*advanced",* recycling. Independent technical reviews from the Natural Resources Defense Council and a joint Beyond Plastics/IPEN report have found that the dominant process (pyrolysis) mostly converts plastic into fuel rather than new plastic, is energy-intensive, and produces hazardous waste, often near lower-income communities.

The 2030 Agenda doesn't name chemical recycling specifically, but by leaving *"material innovation"* undefined, it doesn't rule it out either.

For the sake of clarity, we believe EMF should explictly rule out chemical recycling.

Collection and recycling infrastructure

What's proposed: this is the one area with a funded commitment behind it. Businesses are asked to "*jointly fund Global South city-scale transformations of collection and recycling infrastructure*".

Infrastructure helps, but has real limits. The global plastic recycling rate has stayed flat at around 9% for years, even as collection and sorting investment has grown. Unlike glass or metal, plastic loses quality with each reprocessing cycle, so much of what's collected becomes a lower-grade product rather than looping back into new packaging. It manages the waste problem but can’t and doesn’t solve it.

Taken together, we see a pattern: the plan's firmest financial backing sits behind the option the evidence says is least impactful and asks least of the businesses generating the waste, while the option EMF’s own evidence says matters most — reuse — is asked to rely mainly on governments and collective goodwill.

A FEW DESIGN CHOICES WORTH REVISITING

From 2018, the Global Commitment tracked five goals separately. The 2030 Agenda simplifies this: for brand and retail signatories — 37% of signatories by value chain — the central metric becomes virgin plastic reduction alone, on the basis that it *"captures the effects of most circular economy pathways."* Producers, plastics producers and recyclers keep separate metrics.
This simplification brings real trade-offs:

- **Visibility into how progress is made is lost.** A company hitting its target through reuse and one hitting it through lightweighting now look identical in the topline number. Signatories built the systems to report at this more granular level over several years — we'd encourage EMF to keep using that detail, since it's what lets everyone see what's actually working.

- **The metric creates an incentive to favour flexible packaging** — the category the 2030 Agenda itself describes as "the most challenging from a circular economy perspective." With virgin-plastic weight as the sole number that matters, a straightforward way to improve it is to shift into lighter, harder-to-recycle formats.

- **Individual 2030 targets still vary:** SC Johnson has committed to a 55% virgin-plastic reduction by 2030, L'Oréal to 50%, and Carrefour to 10% on its own-brand single-use packaging. That spread carries a real risk of repeating 2018–2025's pattern, where a handful of ambitious signatories offset many less ambitious ones in the aggregate figures. A common minimum ambition level would go a long way toward preventing that.

WHY WE'RE HOPEFUL

The Global Commitment was a groundbreaking effort — the first time a global coalition of major corporations agreed to be measured, in public, against shared numbers. Eight years on, the honest picture is that results fell short of the ambition signatories set for themselves in 2018, on every metric.

We think the 2030 Agenda can do better and go further in two ways: by pairing every headline achievement with the target it's measured against, and by putting reuse — the mechanism the evidence says matters most — at the centre of its ambition.

Neither of these requires starting from scratch. SC Johnson and L'Oréal have already shown, at real scale, that reuse works when businesses commit to it. REUSE Foundation will keep making this case — with EMF, with the businesses and NGOs reading this, and with the policymakers who'll lean on the 2030 Agenda as their reference point in the years ahead. We believe getting this right is within reach, and our aim is to be part of getting there.



ANNEX 1: A CLOSER LOOK AT HOW HEADLINE FIGURES ARE FRAMED

Every figure presented below is accurate on its own terms, but lack important context. We want to see each one presented alongside the fuller comparison, so readers get the complete picture in one place rather than having to go looking for it.

EMF's headline framing	Likely first impression	The fuller picture	Source
"Avoided 14 million tonnes of virgin plastic — one barrel of oil kept in the ground every second"	A large, ongoing reduction is under way.	This is measured against a modelled baseline, not against the target. Signatories' own virgin plastic use fell 6% by 2024, against an 18% target for 2025 — real progress, with real room still to close.	EMF Global Commitment 2025 Progress Report
"Tripled their use of recycled content"	A major achievement; the target is within reach.	Recycled content rose from 4.2% to 15.9% — a genuine tripling — against a 26% target. Signatories delivered just over half of the promised increase, a strong step but with more to go.	EMF Global Commitment 2025 Progress Report
"Eliminated 775,000 tonnes of the most problematic plastics"	Large-scale removal of harmful material from the system.	A real, specific achievement. Measured against the roughly 140 million tonnes of plastic packaging produced globally each year, 775,000 tonnes accumulated over seven years is a tiny fraction of even a single year's output.	EMF Progress Reports; 2030 Plastics Agenda
"Business signatories … have outperformed the market across nearly all target areas"	Signatories are broadly on track and succeeding.	True relative to non-signatories, who made no comparable commitment. Outperforming them and hitting your own goal are two different measures. Most named signatories, including Unilever, Nestlé and L'Oréal, fell short of their own 2018 targets.	EMF 2023–2025 Progress Reports
Reuse: *"progress has been very limited"*	Slow but positive movement.	Signatories' combined reuse share actually fell for several years — from about 1.5% in 2019 to about 1.2% in 2021 — and has only crept back to around 1.3% since. Worth stating clearly, since it's the metric the evidence says matters most.	EMF Progress Reports, 2019–2024
The 100% reusable, recyclable or compostable packaging target — not restated anywhere in the 2030 Agenda	No figure given, so nothing to check.	Actual 2025 performance reached roughly 70% against the original 100% target. This was one of five founding pillars of the Global Commitment; we'd encourage EMF to carry both the target and the outcome forward into the new agenda's reporting.	EMF Progress Reports, 2019–2025; 2030 Agenda text
Flexible packaging strategy described as *"material innovation"* and R&D *"where relevant"*	A defined technical pathway is being pursued.	The term is undefined. It doesn't name chemical ("advanced") recycling, but doesn't rule it out either — and independent reviews find this approach mostly turns plastic into fuel rather than new material, while producing hazardous waste.	2030 Agenda text; NRDC and Beyond Plastics/IPEN reviews

SOURCES

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- Ellen MacArthur Foundation, 2030 Plastics Agenda for Business (2025)
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- Trade and industry press: Waste Dive, Packaging Dive, Recycling Today, Packaging World, FoodNavigator, Resource Recycling, ICIS, Surfers Against Sewage
- Natural Resources Defense Council and Beyond Plastics / IPEN, technical assessments
- of chemical recycling
- Coverage of UN INC-5.2 plastics treaty negotiations, Geneva, August 2025: CNN, World Economic Forum, European Parliament, IEEFA
- Tsinghua University / Communications Earth & Environment, global plastics trade-flow analysis (2025); Circularity Gap Report
- Company and trade coverage of 2025–2026 portfolio changes: Unilever ice cream demerger (Magnum Ice Cream Company), Nestlé Waters divestment process,
- Mars–Kellanova acquisition (FoodNavigator, The Grocer, SEC filings)