Food positive: driving change to decarbonise the UK food system

A REPORT FROM TETRA PAK UK

Tetra Pak®

Forewords

Wera Hobhouse MP, Liberal Democrat Spokesperson for Energy & Climate Change

March 2023

As the intense pressure on global food and energy supply chains continues to grow, now is the time we should double down on, not pull back from, our commitments to tackling climate change.

Decarbonising our food system is a crucial part of these efforts, and the statistics speak for themselves on the imperative to act. By not tackling the climate impact of our approach to food, we risk missing our net zero goals.

Even if we collectively stopped using all fossil fuels tomorrow, the current food system would still push us beyond the 1.5° target agreed in the Paris Climate Agreement[1].

Furthermore, a failure to act in this area will have a dramatic impact on the way that we feed our growing population in the future. And, as is too often the case, it will have the biggest impact on the most vulnerable and those least well placed to navigate the challenges of climate change.

This urgency is just one of the reasons why I was so pleased that Tetra Pak convened a roundtable to examine what more needs to be done to drive a new approach to decarbonising the food system.

The food and drink industry has made some progress to minimise its climate impact, and I was heartened to hear about many of those efforts during the roundtable. But in many ways, I was also reassured to hear about the challenges and problems, because this indicates that the industry is serious about change, and willing to highlight where progress has been less impressive.

Without this kind of open approach to decarbonising the food system, we stand little chance of succeeding.

As a parliamentarian, I am focused on trying to find tangible, actionable solutions to the challenges we face, and so the practical ideas and examples shared at the roundtable provided real hope for the future.

I am pleased that those discussions, together with research conducted by Tetra Pak on perceptions and intentions around sustainability within food systems amongst UK food and drink businesses and consumers, have formed the basis of this report. I look forward to the conversations and debates that I am sure it will stimulate about how we, collectively, can drive a new approach to our food system.

1 Clark MA, Domingo NGG, Colgan K, Thakrar SK, Tilman D, Lynch J, Azevedo IL, Hill JD. Global food system emissions could preclude achieving the 1.5° and 2°C climate change targets. Science. 2020 Nov 6;370(6517):705-708. doi: 10.1126/science.aba7357. PMID: 33154139.

Forewords

Alex Henriksen, Managing Director, Tetra Pak UK and North Europe

March 2023

The global food system has delivered major human development benefits in recent decades. Food processing technology and packaging solutions, such as those that we at Tetra Pak have been so proud to develop, have helped to protect, improve and deliver food and nutrition across the world, safely and securely.

But the current way food is sourced, processed, packaged, and disposed of, needs to change to transition to more sustainable and resilient food systems.

The global food system accounts for over one third of global greenhouse gas (GHG) emissions. Approximately a third of all food produced is lost or wasted, accounting for 8% of global GHG emissions. Our approach to food must change. But addressing this is a complex and challenging task.

It requires us to take a full life-cycle view of the food system, taking carbon out from every step of the food value chain.

We were pleased in 2022 to see the publication of the Government Food Strategy, following the work started by Henry Dimbleby via the National Food Strategy. Clearly, we now need to see concrete action from Government on measures to decarbonise food production, actions to develop healthier diets, in particular for children, and more generally see action to back up commitments.

Of course, effective recycling is key to this, but it is also about reducing food loss and waste, decarbonising the materials we use to package food and drink, and decarbonising the ways we process food for consumption.

And it is these considerations that drive our approach at Tetra Pak. We have an enabling role with our end-to-end solutions to drive decarbonisation of the food value chain, and are working to develop the world's most sustainable food package, made fully from renewable or recycled materials, fully recyclable and carbon neutral.

As a company, not only have we committed to achieving net zero GHG emissions in our own operations by 2030, but we also work with customers to reduce their emissions, through lower energy food processing equipment, and helping to combat food loss and waste.

But there is much more we can and must do. We are innovating for healthy diets, investing in school feeding programs, enabling sustainable dairy production, and improving supply chain transparency.

This report, and the discussion and research that have informed it, are an attempt to play our role in galvanising action to drive change in the UK's food system. This is the first stage and we look forward to the discussions and actions that it stimulates about driving a new approach to how we feed our world.

Recommendations

Based on the insights and expertise shared at the roundtable, and the research undertaken with food and drink producers and manufacturers, we recommend the following actions to ensure that the necessary shifts in how we produce and consume food are made:

Recommendation One: The Government should explore how green public procurement can be used to encourage access to capital/R&D investments and public-private partnerships to facilitate placing on the market technologies which foster the uptake of healthier and more sustainable foods.

Recommendation Two: The Government should take a more leading role in driving meaningful engagement with suppliers, processors, distributors and supermarkets to develop more sustainable sourcing, production and distribution methods for food. Such collaboration should prioritise innovation within processing and packaging to ensure that consumers are able to access high quality, safe food with a reduced carbon impact.

Recommendation Three: The healthy school meal provision should include requirements around the sustainability and environmental impact of the food being offered, alongside information about healthy and sustainable diets for children.

Recommendation Four: The Department for Education should develop specific guidance for teachers on how the food system's role in mitigating climate change is taught within the school curriculum in secondary schools. This would equip children with the understanding and knowledge to make informed decisions around food and drink.

Recommendation Five: The Government should work with industry to develop consumer awareness campaigns outlining the impact of food waste, and the food choices we make, on the planet, providing examples of where small dietary or behaviour changes or substitutions can help the UK meet its climate goals.

Recommendation Six: The Government should introduce targets for reducing food loss and waste within the food and drink sector, to drive greater action and supplement current proposals for mandatory food waste reporting from 2024.

Recommendation Seven: Policymakers should engage with the food and drink sector to develop clear metrics that provide transparency for consumers on the carbon footprint of products (across value chains) to enable more informed and sustainable consumer choices.

Recommendation Eight: Using R&D financing, the Government should foster the development of technologies which help to combat food waste and loss, including the upcycling of side-streams of the food manufacturing process, which too often are viewed, unnecessarily, as waste.

Recommendation Nine: The Government should continue to create defined regulation around food and drink packaging recycling, which encourages and promotes the use of circular materials as foundational within packaging regulations. This should include specific recycling targets for all packaging materials.

Recommendation Ten: The Government should use policy and regulation which encourages the deployment of sustainably sourced, low carbon plant-based materials in packaging. This includes removing plant-based polymers from the scope of the Plastic Packaging Tax, to incentivise their adoption by packaging manufacturers and producers.

Recommendation Eleven: The Government must continue to design and implement recycling policies that ensure that adequate infrastructure for separate collection of used packaging is put in place. This includes the UK's Deposit Return Scheme, for which the Government should set a firm date for a post launch review of the materials included, so as wide a range of materials as possible, including carton packages, can be added at the first opportunity.

Introduction

The negative climate impact of our current approach to feeding the growing population of our planet is well understood. The UN has identified that 26%[2] of global greenhouse gas emissions come from food systems, with food loss and waste accounting for a staggering 8%[3].

In short, the way we produce, process, consume and dispose of food is pushing us beyond the Earth's planetary boundaries - the limits within which humanity can continue to develop and thrive.

There is no time to waste in finding a new approach to feeding our population, particularly in the UK, where WRAP estimates that 35%[4] of total emissions arise from producing and consuming the country's food and drink. At a time when global food and energy supply chains are under intense pressure, it is of paramount importance that we do not lose sight of our net zero ambitions; particularly those that can be achieved through the decarbonisation of the UK's food system.

There are myriad ways to achieve this. Chief amongst these is embracing more sustainable methods of food production and consumption, whilst reducing food waste and loss throughout the system, and educating consumers to help them make more sustainable choices around their consumption.

Sustainable packaging and processing solutions play a crucial role, offering the security we need to ensure food remains safe and available, whilst embracing renewable and recyclable materials to reduce wider carbon impacts. And of course, recycling of food and drink packaging is at the heart of a solution – creating a circular economy to keep valuable materials in use for as long as possible.

2 Poore, J., & Nemecek, T. (2018). Reducing food's environmental impacts through producers and consumers. Science, 360(6392), 987-992.
3 https://press.un.org/en/2020/dsgsm1465.doc.html
4 https://wrap.org.uk/resources/report/uk-food-system-ghg-emissions

The Government is already taking strides to transform the farm to fork pathway and there are leading sustainability initiatives and efforts being pursued by producers within the food and drink industry.

But to be effective, these solutions cannot be implemented in silos. They require close collaboration between policymakers, industry, and consumers. Indeed, new research from Tetra Pak found that **31% of people believe these are issues which can only be meaningfully addressed by numerous parties joining forces together.**

With this in mind, Tetra Pak brought together a group of experts from across the food and drink value chain to discuss how we can develop the recommendations, solutions and strategies that will drive greater decarbonisation of our food systems. We examined three key areas during discussions:

1. **Developing new ways to feed our world**
2. **Reducing food loss and food waste**
3. **Driving a circular economy**

We combined the insights and ideas shared at the roundtable with new data from a survey of UK food and drink business and consumers on perceptions and intentions around sustainability within food systems.

This report is a summary of these findings and insights, complete with recommendations for government and the food and drink industry. It is intended to begin a conversation that helps government, business and the public to rethink the way we produce, package, consume and dispose of our food and drink.

We hope that it will demonstrate that solutions do exist, but that meaningful change can only be realised when we work together to take steps towards creating decarbonised food systems and a healthier planet for all of us.

Tetra Pak commissioned Censuswide to survey 150 food and drink business leaders across the UK and Ireland and 511 consumers across the UK between 7th and 12th October 2022.

About the roundtable

ATTENDEES

Katie Carson
Director, Corporate Affairs, Food & Climate Policy, Tetra Pak

Paula Chin
Senior Policy Advisor (Consumption), WWF-UK

Dr James Cooper
Deputy Director of Food Policy, Food Standards Agency

Lord Deben
Chair, Climate Change Committee

Shaunagh Duncan
Head of Sustainability, UK & BENELUX, Oatly

Hamish Forbes
Senior Analyst, WRAP

Alex Henriksen
Managing Director, Tetra Pak UK & North Europe

Wera Hobhouse MP
Liberal Democrat Spokesperson for Energy & Climate Change

Ruth Jones MP
Labour Shadow Minister for Agri-Innovation & Climate Adaptation

Martin Kersh
Executive Director, Food Packaging Association

Jenny Pidgeon
Head of Sustainability & Social Innovation, Danone

Emma Piercy
Head of Climate Change & Energy Policy, Food & Drink Federation

Dragan Rajković
Sustainability Director, North & East Europe, Tetra Pak

Trewin Restorick
Founding CEO, Hubbub

Dr Ximena Schmidt
Senior Lecturer, Sustainable Food Systems, Brunel University

Joanna Trewern
Head of Consumption, WWF-UK

70%

of food and drink producers and manufacturers agree that sustainability is an urgent issue.

35%

of business owners and

37%

of directors think that the government could be doing more to provide help and guidance to organisations around sustainability.

CHAPTER ONE:

Establishing a new approach to feeding our planet

As the world's population continues to grow, we will face an ever increasing challenge of how to feed more people without pushing us beyond the Earth's planetary boundaries - the limits within which humanity can continue to develop and thrive.

Alex Henriksen, Managing Director, North Europe at Tetra Pak, summed up the challenge during the roundtable: "We are trying to find solutions to how we can provide food for the growing population, the 9.5 billion people that are estimated to be on the planet by 2050."

Much of the science and statistics around a failure to decarbonise our food systems are already well known. However, in a challenging economic climate, progress on reaching our carbon reduction targets is at risk of falling victim to other commercial pressures. This was echoed in Tetra Pak's research which found that 70% of food and drink producers and manufacturers agree that sustainability is an urgent issue, but say that the current socio-economic climate means that other issues need to take priority within their organisation.

This was a sentiment that **Wera Hobhouse MP, Liberal Democrat Spokesperson for Energy & Climate Change,** warned against, highlighting that "by not tackling the climate impact of the food system now, we risk missing our net zero goals, which we cannot afford to do."

Some positive steps are already being taken by policymakers to address these urgent challenges and **Katie Carson, Director of Corporate Affairs Food and Climate Policy at Tetra Pak,** welcomed the publication of the Government Food Strategy. However, she urged concrete action on this strategy, echoing a feeling amongst 35% of business owners and 37% of directors that the government could be doing more to provide help and guidance to organisations around sustainability.

Katie called for greater support to "enable the decarbonisation of the food system and develop healthier diets", pointing to Tetra Pak's commitment to achieve net zero within its own operations by 2030, while still innovating for healthy diets and investing in school feeding programmes.

Tetra Pak is of course not alone in these commitments and **Shaunagh Duncan, Head of Sustainability, UK and BENELUX, Oatly,** described her company's sustainability plan, which sets out ambitions across its full value chain from ingredient sourcing to business operations and distribution.

Shaunagh pointed to the global imperative to reduce our reliance on meat and dairy if we are to reach our net zero targets, and noted that "the Government's environmental land management scheme is a really promising step in the right direction."

Hamish Forbes, Senior Analyst at WRAP, also struck a note of positivity, saying, "In 2015, UK food and drink consumption had an impact of 175 million tons of carbon dioxide equivalent. That's gone down by about 12% to 155 million tons in 2020. We need to learn from the trailblazing businesses and roll out measures further across five areas that feed into our food system – energy, transport, deforestation, agriculture, and diets, including food waste. These are our big tickets for hitting our emission targets for 2030 and 2050."

Joanna Trewern, Head of Consumption at WWF UK, echoed this sentiment, saying that she is "encouraged to see action coming from business on new food production techniques to protect biodiversity...there's been a lot of effort to support farmers to improve their production practices, and also up the supply chain, to support consumers to change their behaviour."

However, she also reflected that "we simply will not achieve net zero in this country, or indeed globally, if we do not shift our diets. And I'm not talking about everyone in the world suddenly going vegetarian or vegan but we are talking here about a transition. A lot of narratives that we see are around not wanting to tell people what to eat, but actually this view fails to recognise behaviour as an output of the systems in which we all operate. We really need to understand the kinds of things that government and business can do, to support and enable better diets, including incentives and regulation that impact what's produced and therefore diets."

One positive step already in progress is the Department for Environment, Food and Rural Affairs' (DEFRA) upcoming land use framework, which will be published in 2023 and was described as a 'key milestone' by **Emma Piercy, Head of Climate Change and Energy Policy at the Food and Drink Federation.** She suggested that "this is a major opportunity upon which to build green growth in this country that will help businesses, help people, and help the environment."

"If you only look at sustainability or environmental KPIs, or you only look at nutrition KPIs, you end up pursuing a singular direction whereas of course we need to find solutions that positively address both challenges."

Returning to a potential reduction in meat and dairy consumption, **Lord Deben, Chair of the Climate Change Committee and former Secretary of State for the Environment,** expressed concern that despite clear scientific evidence supporting this, the government had thus far been reluctant to nudge public behaviour change. He said, "The Climate Change Committee has said that we have to reduce our intake of meat and dairy by 20%, which is a very modest amount. But it's still not been accepted by the government which has this peculiar view that somehow or other it's improper, it's nannying people. I think that is nonsense."

But **Lord Deben** also noted that in driving more sustainable diets, "it is not as simple as plant versus animal. The issue is more complicated. You may be very much in favour of fruit and vegetables, but, for example, avocados are hardly ever produced in a way which is environmentally satisfactory."

There was widespread agreement amongst participants at the roundtable about the health and environmental benefits of a balanced approach to meat and dairy in diets, with **Jenny Pidgeon, Head of Sustainability and Social Innovation at Danone,** noting the importance of looking at sustainability and nutrition together. She commented that this is essential because "if you only look at sustainability or environmental KPIs, or you only look at nutrition KPIs, you end up pursuing a singular direction whereas of course we need to find solutions that positively address both challenges."

We need to "address the challenges around food safety and security, through the exploration and advancement of innovative food sources."

Alex Henriksen reflected on some of the ways in which producers and manufacturers are seeking to create more sustainable approaches to food production. This includes Tetra Pak's partnership with Swedish company, Mycorena, to create a fungi-based meat replacement. He acknowledged that both meat and meat-alternatives are needed to feed the global population but partnerships such as these supported Tetra Pak's long-term view to "address the challenges around food safety and security, through the exploration and advancement of innovative food sources."

Recommendations

Based on the insights and expertise shared at the roundtable, and the research undertaken with food and drink manufacturers, we recommend the following actions to establish a new, sustainable, approach to feeding our planet:

Recommendation One: The Government should explore how green public procurement can be used to encourage access to capital/R&D investments and public-private partnerships to facilitate placing on the market technologies which foster the uptake of healthier and more sustainable foods.

Recommendation Two: The Government should take a more leading role on driving meaningful engagement with suppliers, processors, distributors and supermarkets to develop more sustainable sourcing, production and distribution methods for food. Such collaboration should prioritise innovation within processing and packaging to ensure that consumers are able to access high quality, safe food with a reduced carbon impact.

Recommendation Three: The healthy school meal provision should include requirements around the sustainability and environmental impact of the food being offered, alongside information about healthy and sustainable diets for children.

CHAPTER TWO:

Changing the way we view our food – consumer education and tackling food waste

An effective new approach to how we feed the UK's, and world's, growing population will in no small measure be reliant on consumer engagement and behaviour.

This was a point highlighted at the roundtable discussion by **Lord Deben, Chair of the Climate Change Committee and former Secretary of State for the Environment,** when he said that "we will not get a just transition unless people have choice. But they must have choice which is informed - without this, efforts to shift dietary habits will not meet with success, and this is something which the government must become more mindful."

This was a sentiment echoed by **Paula Chin, Senior Policy Advisor at WWF UK,** who commented that "whether it be organic or non-organic materials, we're consuming too much," with uninformed consumer behaviour the product of a system which is "no longer fit for purpose."

One of the key ways to empower consumers with the information they need to make better choices for their health and the planet is through better environmental labelling, including the climate impact of a package.

This is something of which **Danone** is acutely aware, with **Jenny Pidgeon, Head of Sustainability and Social Innovation,** highlighting findings from the company's work with youth organisation, Bite Back, which found that young people are already looking for this information on labels and want to see more of it, something that Danone is acting on through its participation in the Foundation Earth labelling pilot.

50%

of consumers say the decarbonisation efforts or sustainability credentials of brands have a bearing on the purchases they make.

> **"Consumers have the right to environmental information, just like they do nutritional information or price information, right there on the pack."**

Indeed, Tetra Pak's research suggests that it is in manufacturers' interests to adopt environmental labelling. Half of UK consumers say the decarbonisation efforts or sustainability credentials of brands have a bearing on the purchases they make.

Shaunagh Duncan highlighted that **Oatly** was one of the first large brands to put carbon labelling on its packaging in 2018 to echo the company's belief that "consumers have the right to environmental information, just like they do nutritional information or price information, right there on the pack."

However, to drive meaningful long-term change consumers must be able to compare labels across products and **Shaunagh** urged government to "make labelling mandatory and, more crucially, to standardise the methodology for that labelling."

Joanna Trewern, Head of Consumption at WWF UK, noted that labelling needs to be about more than just the climate impact of a product, and should include other important indicators such as "measuring biodiversity loss, because consumers need to see that full picture in terms of environmental impact of a product."

Building on the importance of the consumer in this process, **Martin Kersh, Executive Director at the Food Packaging Association,** highlighted the need to ensure that the development of large-scale labelling was not another cost to be borne by the consumer, as he noted that realistically, "businesses aren't going to absorb that cost."

Ruth Jones MP, Labour Shadow Minister for Agri-Innovation and Climate Adaptation, stressed the need to provide information in an accessible way that recognises the needs of consumers, saying that "we need clear communication, clear labelling. The consumer hasn't got time to read five paragraphs of information when they're going around the supermarket."

> **"We need clear communication, clear labelling. The consumer hasn't got time to read five paragraphs of information when they're going around the supermarket."**

Dr Ximena Schmidt, Senior Lecturer, Sustainable Food Systems, Brunel University, highlighted a recent policy from the Department of Education around integrating climate change and sustainability in the curriculum.

However, she flagged concerns that the policy did not share guidance on how to deliver this integration which risks "passing the baton to educators who may not necessarily have the knowledge. This means we're missing a lot of opportunities for younger generations to get on top of the issues."

Paula Chin echoed this point, noting that schools should not pigeonhole climate education as being about geography, but rather "it warrants its own focus, as it takes in parts of physics, biology, geography, history, everything."

Alex Henriksen pointed to Tetra Pak's work to educate consumers through its Connected Packaging platform. This makes it possible for members of the public to digitally engage with each carton they buy, allowing packaging to become a channel for information and interaction.

Food waste, a huge contributor to climate change in the UK, is an area in which action can be driven by greater consumer awareness, alongside efforts by government and industry.

Joanna Trewern highlighted research from the WWF which shows that food waste on farms is responsible for 10% of agricultural emissions and contributes to around 40% of total food wasted in the UK. She commented that "this is a really overlooked area and we have lots of solutions of how we can better address this, things like changing procurement standards."

Emma Piercy, of the Food and Drink Federation, noted the significance of domestic food waste and the volumes of edible products that are regularly thrown away. With a cost-of-living crisis, and food and drink inflation at 14.6% in September 2022, she suggested that "tackling food waste in the home can make a real difference to a consumer's bills, and make a major impact on carbon emissions."

"Healthy, sustainable food is one of the key pillars of the Agency, but the primary thing has to be food that is safe, that we have food we can trust. So, how we can bring together reducing food waste while ensuring that food remains safe, is really important."

Dr James Cooper, Deputy Director of Food Policy at the Food Standards Agency, reminded the roundtable that "healthy, sustainable food is one of the key pillars of the Agency, but the primary thing has to be food that is safe and food that we can trust. So, how we can bring together reducing food waste while ensuring that food remains safe, is really important."

He noted, "it is absolutely key that we think about how we get the messages to consumers to change their behaviour around food waste in the right way, that is safe for them and that is actually going to deliver change."

Katie Carson from Tetra Pak, highlighted how the company is seeking to "support customers in their decarbonisation journeys across the food value chain, including around food waste, for example by ensuring that Tetra Pak packages are designed to prolong the life of food and help prevent it from perishing."

Recognising that food waste and loss starts even before products hit supermarket shelves, Katie also touched on Tetra Pak's work to create more innovative approaches to food processing, to reduce spills and spoils during production. For example, Tetra Pak's Dairy Hub model provides local smallholder farms with access to local dairy processors, preventing food loss along the value chain. This is supported by access to specially designed digital platforms which help producers and manufacturers track and achieve their food loss and waste goals.

Recommendations

Based on the insights and expertise shared at the roundtable, and the research undertaken with food and drink manufacturers, we recommend the following actions to improve consumer engagement and understanding of the food system in driving the UK's sustainability and net zero goals:

Recommendation Four: The Department for Education should develop specific guidance for teachers on how the food system's role in mitigating climate change is taught within the school curriculum in secondary schools. This would equip children with the understanding and knowledge to make informed decisions around food and drink.

Recommendation Five: The Government should work with industry to develop consumer awareness campaigns outlining the impact of food waste, and the food choices we make, on the planet, providing examples of where small dietary or behaviour changes or substitutions can help the UK meet its climate goals.

Recommendation Six: The Government should introduce targets for reducing food loss and waste within the food and drink sector, to drive greater action and supplement current proposals for mandatory food waste reporting from 2024.

Recommendation Seven: Policymakers should engage with the food and drink sector to develop clear metrics that provide transparency for consumers on the carbon footprint of products (across value chains) to enable more informed and sustainable consumer choices.

Recommendation Eight: Using R&D financing, the Government should foster the development of technologies which help to combat food waste/loss, including the upcycling of side-streams of the food manufacturing process, which too often are viewed, unnecessarily, as waste.

41%

of businesses say supply chain challenges or disruption, such as shortages of raw materials and price increases, are the biggest barrier to adopting sustainable packaging options.

CHAPTER THREE:

Driving a circular economy and increasing the use of renewable, low carbon materials

A third aspect to driving decarbonisation of the food system is ensuring that the materials we use for packaging are sustainable and recyclable.

The first challenge in this regard is ensuring adequate access to materials that are renewable and low carbon. This is proving a challenge amidst current socio-political backdrops, with 41% of businesses saying supply chain challenges or disruption, such as shortages of raw materials and price increases, are the biggest barrier to adopting sustainable packaging options.

Paula Chin, of WWF, acknowledged the complicated landscape but stressed the need for greater supply chain transparency: "There is significant focus on the impacts of plastic pollution, but less attention on the impacts of all material supply chains. Understanding those and tackling some of the hot spot impacts is absolutely critical."

Lord Deben agreed, noting, "you cannot deal with Category 3 emissions unless you understand supply chains and, indeed, one of the central issues we need to face is the fact that very large numbers of companies have never really understood their supply chains."

"There is significant focus on the impacts of plastic pollution, but less attention on the impacts of all material supply chains. Understanding those and tackling some of the hot spot impacts is absolutely critical."

And while much attention is rightfully given to British supply chains and production methods, **Hamish Forbes** reminded the group that food systems are global. "We import nearly half of our food. It's not just about British farms.

But according to the Global Alliance for the Future of Food report, only 3% of public money spent on climate mitigation goes to food systems, despite them accounting for a third of global emissions."

Of course, a holistic view of materials is also required, as noted by **Martin Kersh, Executive Director of the Food Packaging Association.**

Without a level of transparency, "packaging materials, whether you recycle them, whether they're compostable, end up in some sort of black hole, usually in other countries."

He cautioned against rushing to replace one material to achieve a particular sustainability goal, without considering other goals, such as the replacement material in fact having a higher carbon footprint.

Trewin Restorick, Founding CEO of Hubbub, explored this point further commenting that "we need to be strong on carbon, because the 'war on plastics' has led to people taking steps such as putting bottled water into higher carbon packaging. So, we need to be really clear about what the end environmental effect is across all materials."

Turning to the question of recycling, **Trewin** shared a sense of frustration felt across industry that the UK's recycling and waste management system is inconsistent and works for neither businesses nor consumers – or indeed local authorities.

He suggested that "Tetra Pak, currently falls into the chasm that's been created by this lack of clarity. It is a good carbon package but the waste management and collection systems don't work, because local authorities won't or can't collect cartons."

The importance of recycling to consumer purchasing choices is something that Tetra Pak's research highlighted, with 69% of consumers highly valuing companies that are clearly taking steps to provide recyclable packaging options for food and drink products.

Wera Hobhouse MP raised the importance of traceability of recycling, suggesting that one solution could be to make it mandatory for councils to disclose this information, albeit there would be an extra cost associated with doing this. However, she argued that without this level of transparency, "packaging materials, whether you recycle them, whether they're compostable, end up in some sort of black hole, usually in other countries."

69%

of consumers highly value companies that are clearly taking steps to provide recyclable packaging options for food and drink products.

Dragan Rajković, Sustainability Director for North and East Europe at Tetra Pak, stressed the need for "packaging and packaging waste regulation to provide assurance, guidance and certainty to manufacturers, as well as provide equal treatment of different materials."

"Alongside stronger regulation," he continued, "sits government support for investment in recycling infrastructure, and consumers feeling strongly motivated to participate in the collection process." He noted that this formula has been successfully used in Belgium, where there is a beverage carton recycling rate of over 90%, based on robust infrastructure, clear recycling targets, and good consumer understanding.

Dragan reflected that "A deposit system creates the opportunity to satisfy all these requirements. We have been advocating to DEFRA for a long time for cartons to be included in the UK's deposit return scheme, to accelerate collection and provide higher quality materials for recycling processes."

There was strong agreement amongst roundtable attendees that the UK Deposit Return Scheme (DRS) has a key role in driving better recycling, but to do this it must be easily understood by consumers, future proofed by including the latest technology, and as wide in scope and ambitious as possible. It is therefore disappointing that the Government has instead elected to pursue a DRS that only includes PET plastic and aluminium and steel cans in England.

Jenny Pidgeon from Danone, urged "a unified approach to the DRS across the UK" for fear of creating a confusing system that creates "inertia amongst consumers to engage." She also noted Danone's trial of a Digital DRS, and stressed the importance of implementing futureproofed systems that will suit the evolving needs of consumers. She queried if systems such as reverse vending machines commonly used in countries like Sweden which have had a DRS for many years, would be the right system for UK consumers highly prizing convenience.

On this latter point, **Wera Hobhouse MP** shared her belief that "most people are now converted to the need for a digital system rather than installing big boxes in supermarkets."

"A deposit system creates the opportunity to satisfy all these requirements. We have been advocating to DEFRA for a long time for cartons to be included in the UK's deposit return scheme, to accelerate collection and provide higher quality materials for recycling processes."

Trewin Restorick welcomed the Government's efforts to "sort out the UK's broken recycling system" but urged greater clarity for businesses, noting continued delays to legislation.

He commented, “what I hear from business after business is the continual round of consultation and prevarication is actually hindering the solution because not one business knows with any confidence where it should be investing. So, I think the first thing policymakers could do is get some clarity around timelines.”

Roundtable attendees acknowledged the good intentions of many government policies, but highlighted the problem of policies tackling climate change, and those tackling recycling, being developed in silos. **Ximena Schmidt** suggested that too many policies are “still working separately although there are many interconnections between them.”

Dragan agreed, noting that this is the case with the Plastic Packaging Tax. If the Government had chosen to exclude lower carbon polymers from the Tax’s scope, such as those made from responsibly sourced sugar cane, “producers could have been incentivised to choose lower carbon alternatives for their packaging, rather than fossil fuel based plastics.”

Emma Piercy, of the Food and Drink Federation, also raised concerns about joined up thinking around the Plastic Packaging Tax, noting that “chemical recycling technology plays a crucial role in increasing the availability of food-grade recycled content, as mechanical recycling is not an option for certain types of plastics used for food contact applications.” She noted that chemical recycling is “essential to bring circularity to a greater range of plastics, reduce carbon footprint, replace fossil-based plastic, and contribute to reducing the amount of plastic leakage to the environment.” Emma highlighted that “to fully unlock its potential and to enable recycled content derived from chemical recycling to be included as recycled content for the purpose of the tax, the industry needs mass balance accounting to be approved under the tax rules.”

Jenny Pidgeon echoed this sentiment, noting that there needs to be an “innovation mindset behind policies, really embedding potentially new recycling processes.”

Recommendations

Based on the insights and expertise shared at the roundtable, and the research undertaken with food and drink manufacturers, we recommend the following actions to drive a circular economy in the UK:

Recommendation Nine: The Government should continue to create defined regulation around food and drink packaging recycling, which encourages and promotes the use of circular materials as foundational within packaging regulations. This should include specific recycling targets for all packaging materials.

Recommendation Ten: The Government should use policy and regulation which encourages the deployment of sustainably sourced, low carbon plant-based materials in packaging. This includes removing plant-based polymers from the scope of the Plastic Packaging Tax, to incentivise their adoption by packaging manufacturers and producers.

Recommendation Eleven: The Government must continue to design and implement recycling policies that ensure that adequate infrastructure for separate collection of used packaging is put in place. This includes the UK's Deposit Return Scheme, for which the Government should set a firm date for a post launch review of the materials included, so as wide a range of materials as possible, including carton packages, can be added at the first opportunity.

Conclusion

No single solution will lead to the decarbonisation of our food systems. However, working in collaboration across government and industry and with the consumer at the heart of decision making, finding a range of practical and effective solutions will be far easier.

Furthermore, these solutions must be delivered urgently. Climate change goals are rapidly approaching, and decisive and swift action must be taken around the way we produce, consume, package and dispose of food and drink, not only in the UK but around the world. A failure to do this dramatically compromises our ability to reach net zero, which will have devastating impacts on the health of the planet. We all have a responsibility and must act collectively now.

At Tetra Pak, through continued innovation we have created a reality of not only being able to replace or reduce our consumption of foods which have higher carbon impacts, but being able to package these in a way that embraces renewable, low carbon materials. We must pursue these opportunities with accelerated determination to make the vital gains that our planet needs.

Tetra Pak has published this report in a bid to further the necessary collaboration and bring together the industry and policy players that could effect change across the UK.

We hope that this is the start of an ongoing dialogue that will result in tangible action on decarbonising our food systems.