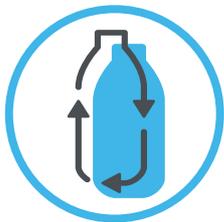




Brands for a Clean & Circular Economy

Drivers of Sustainability – through Eco-Design

How Brands optimise their Packaging

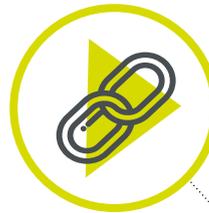


GOAL: Optimised resource use & recycling

- Reuse solutions
- Material reduction
- Use of recycled material
- Use of bio-based material
- Compatibility with existing recycling infrastructure

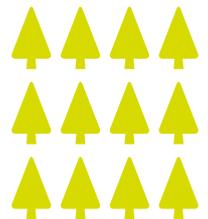


How Brands work along the Supply Chain



GOAL: Responsible sourcing

- Promoting responsible sourcing practices to drive positive impact on people in brands' supply chains



How Brands engage Consumers in Sustainability

GOAL: Environmentally sound consumer choice and use

- Sustainability information for consumers on sustainable product choices, proper waste disposal, recycling, anti-littering, etc.
- AIM Nudging for Good - Brands' promotion of sustainable lifestyles



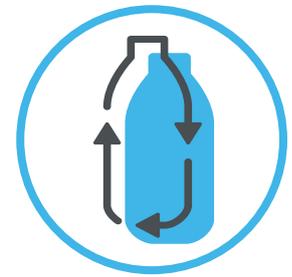
How Brands optimise their Production Processes

GOAL: Sustainable production

- Reducing greenhouse gas emissions
- Transferring to renewable energy
- Decreasing water use
- Zero waste to landfill
- Eliminating waste from production sites



How Brands optimise their Packaging



AIM Brands' Eco-Design Commitments for Packaging



Recyclability



Recycled content

AB InBev



2025: 100% packaging returnable or made from majority recycled content

Arla Foods



2025: 100% recyclable packaging for own brands



2030: 0% virgin fossil plastic in packaging for own brands, prioritising recycled material

Bacardi



2025: 100% recyclable product packaging



2025: 40% recycled content in product packaging

Beiersdorf



2025: 100% refillable, reusable or recyclable packaging



2025: 30% recycled content in plastic packaging (vs 2019)

Bel Group



2025: 100% recycle-ready and/or biodegradable packaging

2030: reusable, edible biodegradable packaging

BIC



2025: 100% reusable, recyclable or compostable packaging

Coca-Cola



2025: 100% recyclable packaging



2030: 50% recycled content in packaging (already met as of 2025 in a considerable number of markets in Europe)

Colgate-Palmolive



2025: 100% recyclable, reusable or compostable packaging



2025: 25% recycled content in all plastic packaging

Danone



2025: 100% recyclable, reusable or compostable packaging



2025: 100% recycled plastics in Evian PET bottles

Diageo



2025: 100% of used plastic designed to be widely recyclable (or reusable/compostable)

2030: 100% widely recyclable or reusable/compostable packaging



2025: 40% average recycled content in plastic bottles

2030:
- 100% average recycled content in plastic bottles
- 60% recycled material for packaging

Dr. Oetker



2025: 100% recyclable packaging

Essity



2025: 100% recyclable packaging across all product categories



2025:
- 85% renewable or recycled material in packaging

Estee Lauder



2025: 75-100% recyclable, refillable, reusable, recycled or recoverable packaging



2025: 50% post-consumer recycled material in packaging (vs 2019)

Ferrero



2025: 100% reusable, recyclable or compostable packaging



2025: 12% recycled content in plastic packaging

FHCS (Freudenberg Home and Cleaning Solutions: parent company) / Vileda



2025:
- 100% recyclable plastic packaging

- >20% reduction of new plastic in packaging



2025: At least 25% recycled material in plastic packaging

FrieslandCampina



2025: 100% recyclable/reusable packaging

Haleon



2030: 100% recyclable or reusable packaging



2030: 1/3 reduction of virgin petroleum-based plastic in packaging

Henkel



2025: 100% recyclable or reusable packaging

2030: 100% reusable or recyclable packaging by design



2025: 30% recycled plastics for consumer packaging

Jacobs Douwe Egberts



2025: 100% recyclable or compostable packaging



2025: 35% recycled content in packaging

Johnson and Johnson Consumer Health



2025: 100% reusable, recyclable or compostable plastic packaging



2030: 100% recycled LISTERINE® plastic bottles

Kellogg



2025: 100% reusable, recyclable or compostable packaging

Kraft Heinz



2025: 100% globally recyclable, reusable or compostable packaging

Lactalis



2025: 100% packaging recyclable-by-design (vs 2019)

2033: 100% packaging recyclable in practice (baseline 2019)



2025: 30% recycled material in packaging

Lavazza



2025: reusable, recyclable or compostable packaging



2025: 60% plastic material from recycled sources

LEGO Group



2025: 100% renewable or recyclable packaging

Lindt Sprüngli



2025: 100% recyclable or reusable packaging

L'Oréal



2025: 100% rechargeable, refillable, recyclable or compostable plastic packaging



2025: 50% plastic packaging coming from recycled or bio-based sources

2030: 100% recycled or bio-based plastic packaging content

LVMH

(Louis Vuitton Moët Hennessy)



2030: 70% recycled raw materials in packaging

Mars



2025: 100% reusable, recyclable or compostable packaging



2025: 30% recycled content in plastic packaging

McCormick



2025: 100% circular recyclable, reused or repurposed plastics packaging

2025: 100% circular recyclable, reused or repurposed plastics packaging

Mondelez



2025: 100% recyclable packaging



2025: 5% recycled plastic content

Nestlé



2025: 50% recycled PET



2025: 50% GHG emission reduction

2050: Net zero GHG emissions

Nomad Foods Europe



2022: 100% recyclable consumer packaging



Orkla



2025: 100% recyclable packaging



2025: - 75% packaging made from recycled materials

- 50% plastic packaging made of recycled or renewable materials

PepsiCo



2025: 100% recyclable, compostable or biodegradable packaging



2030: 50% recycled content across plastic packaging

Pernod-Ricard



2025: 100% recyclable, reusable, compostable packaging



Procter & Gamble



2030: 100% recyclable, reusable, compostable packaging



2030: 50% reduction of virgin petroleum plastic in packaging

Reckitt



2025: 100% recyclable or reusable packaging



2025: 25% recycled content in plastic packaging

Savencia Fromage & Dairy



2025: 100% recyclable or biodegradable packaging

SC Johnson



2025: 100% recyclable or reusable plastic packaging



2025: Triple recycled plastic content in packaging, including 40% recycled content in North American and European plastic bottles

Sofidel



2030: 50% reduction of conventional plastic for packaging (vs 2013)

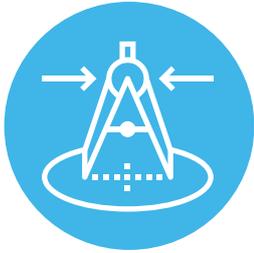
Unilever



2025: 100% reusable, recyclable or compostable plastic packaging



2025: 25% recycled content in plastic packaging



Brands' Packaging & Product Design Innovations - a selection



Unilever reduces environmental impact of aerosols with compressed deodorant



Essity reduces waste and offers more to the consumer with new coreless toilet paper without cardboard tube



Procter & Gamble increases recyclability of bottles by introducing sleeves on transparent recyclable bottles instead of using coloured bottles that are difficult to recycle.



Nestlé moves from plastic to paper with a new pouch that is made of coated paper instead of plastics and fully recyclable in the normal paper recycling stream



Mars Petcare ensures that packaging gets recycled by establishing a collection and recycling scheme for all pet food packaging & pouches in UK



Coca-Cola produced a world-first prototype sample bottle using 25% marine plastics in partnership with Indorama Ventures and Ioniq Technologies



RB increases recyclability of spray bottles by sourcing triggers made out of single polymer, without metal components



PepsiCo built up the UK's first nationwide collection and recycling scheme for potato crisps bags, working with TerraCycle



Diageo reduces plastic waste by replacing plastic packaging for their multipack beer brands by 100% recyclable and biodegradable cardboard



Henkel introduces new black plastic packaging that is carbon black-free and fully recyclable

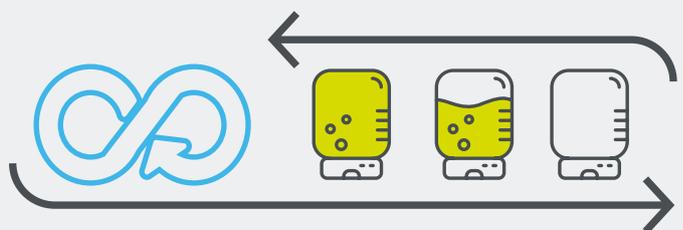


SC Johnson expands refill options for its cleaning brands to cut plastic pollution

Brands' Reuse Solutions

Loop, a new innovative, online shopping concept challenging single use packaging

Loop is one of the most advanced initiatives in this field, launched by AIM members Procter & Gamble, Nestlé, PepsiCo, Unilever, Mars Petcare, Coca-Cola European Partners, Mondelēz International, Danone, Jacobs Douwe Egberts, RB, BIC and Beiersdorf in January 2019 with partners TerraCycle, retailers and



waste management operators. Products purchased on the Loop platform are available in customised, durable packaging, which is subsequently collected for reuse rather than recycling.

Digital Watermarks Initiative HolyGrail 2.0

Pioneering digital watermarks for smart packaging recycling in the EU

The Digital Watermarks Initiative HolyGrail 2.0 **facilitated by AIM, the European Brands Association**, as the next iteration of the initial HolyGrail project under the Ellen MacArthur Foundation (2016-2019) is a **pilot project** bringing together 170+ companies and organisations from the complete packaging value chain. The objective is to **prove the viability of digital watermarking technologies for accurate sorting** and consequently **higher quality recycling**, as well as the **business case at large scale**.



"Innovation, sustainability and digital are the 3 key ingredients we are combining with smart packaging through digital watermarks to achieve the objective of the Green Deal towards a clean, circular and climate neutral economy."

Digital watermarks are **imperceptible codes**, the size of a postage stamp, covering the surface of a **consumer goods packaging** and carrying a wide range of attributes. The aim is that once the packaging has entered into a waste sorting facility, the digital watermark can be detected and decoded by a standard high resolution camera on the sorting line, which then based on the transferred attributes (e.g. food vs. non food) is able to sort the packaging in corresponding streams. This would result in better and more accurate sorting streams, thus consequently in **higher quality recyclates benefiting the complete packaging value chain**.



www.digitalwatermarks.eu

Circular Plastics Alliance



Launched by the European Commission, the Circular Plastics Alliance aims to **boost the EU market for recycled plastics to 10 million tonnes by 2025**.

The alliance covers the full plastics value chain and includes over 175 organisations representing industry, academia and public authorities.

The Packaging Working Group, which AIM has joined, focuses on:

- **Collection and sorting**
- **R&D and investments, including chemical recycling**
- **Recycled plastic content in products**
- **Product design for recycling**
- **Monitoring/tracking the volumes of recycled plastics sold vs. pledged**

https://ec.europa.eu/growth/industry/policy/circular-plastics-alliance_en





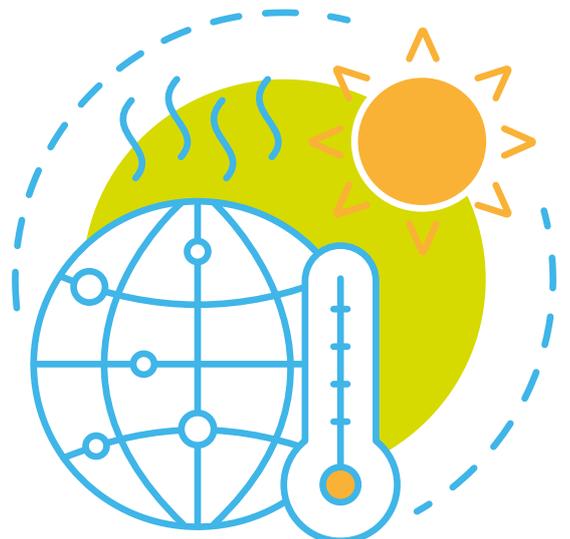
AIM Statement on Climate Change

AIM, the European Brands Association, believes that climate change is one of the greatest challenges we face, as society and as businesses.

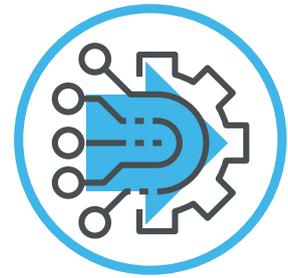
Tackling the accelerating pace of climate change requires transformational changes to the broader systems in which brands operate.

As brands we are committed to mitigate climate change by reaching the global consumer goods industry's goal of driving down carbon emissions through innovation in our production processes, our supply chains and our products.

We also need government policies that create the right context for change and business action to advance the goal of the Paris Agreement to limit global temperature rises to 1.5 degrees by the end of the century. Only by working together with all concerned stakeholders, in full transparency and with a long-term view, can we embrace what we believe to be the essential purpose of corporations: to improve our society, where CEOs are truly committed to meeting the needs of all stakeholders, not only primary shareholders.



How Brands optimise their Production Processes



By ensuring sustainable production processes for our products and packaging, brands aim to reduce greenhouse gas emissions, transfer to renewable energy, decrease water use, promote zero waste to landfill, and eliminate waste from the production sites. All AIM brands report on an annual basis about their commitments and progress in this field.



Greenhouse gas / carbon emissions



Renewable energy

AB InBev



- 2025:**
- 35% absolute emission reduction (scope 1&2 vs 2017)
 - 25% CO2 emissions reduction per hectoliter across supply chain (scope 3 vs 2017)

2040: Net zero across value chain



- 2025:** 100% purchased electricity from renewable sources

Arla Foods



- 2030:**
- 63% company's GHG emissions reduction and reduction from purchased energy (scope 1&2)
 - 2030: 30% emission reduction for scope 3 (farm level)



- 2020:** 50% renewable energy

Bacardi



- 2025:** 40% recycled content in product packaging



- 2025:** 50% GHG emissions reduction (vs 2015)

Barilla



- 2030:**
- 25% absolute GHG emission reduction (scope 1&2 vs 2017)
 - 26% relative GHG emission reduction per tonne of finished product (scope 3 vs 2017)

Beiersdorf



- 2025:** 30% absolute GHG emission reduction (scope 1,2&3 vs 2018)
- 2030:** Climate-neutral production sites

Bel Group



- 2030:** 20% emission reduction from upstream agricultural activities (vs 2017)
- 2025:** Carbon-neutral operations
- 2050:** Carbon-neutral value chain

BIC



- 2025:** operate on 100% renewable electricity

Chanel



- 2030:**
- 50% CO2 emission reduction (scope 1&2 vs 2018)
 - 40% CO2 emission reduction per unit sold (scope 3 vs 2018)



- 2025:** 100% renewable electricity in own operations

Coca-Cola



- 2030:** 25% GHG emission absolute reduction
- 2050:** Net zero carbon

Colgate-Palmolive



- 2040:** Net zero carbon
- 2030:** 100% renewable electricity in global operations

Coty



- 2030:** 100% renewable electricity for all sites

Danone



- 2030:** 30% CO2 emission absolute reduction (scope 1&2 vs 2015)

2050: Carbon neutral



- 2030:** 100% renewable electricity

Diageo



- 2030:**
- Net zero carbon (scope 1&2)
 - 50% emission reduction (scope 3)



- 2030:** 100% electricity from renewable sources for all operations

Dr. Oetker



- 2030:** 35% carbon footprint reduction
- 2050:** Climate neutrality in all indirect areas of influence

Essity



- 2030:**
- 35% emission reduction (scope 1&2)
 - 18% emission reduction (scope 3)

2050: net zero emissions from all operations products (baseline 2016) as part of Science Based Target initiative

Estee Lauder



2030:

- 50% GHG absolute emission reduction (scope 1&2 vs 2018)
- 60% GHG emission reduction per unit revenue (scope 3)

Ferrero



2030:

- 50% CO2 emission reduction (scope 1&2 vs 2018)
- 43% GHG emission reduction per tonne of product produced (scope 1,2&3 vs 2018)

FHCS (Freudenberg Home and Cleaning Solutions: parent company) / Vileda



2025: 25% CO2 emission reduction per million euros of sales

2045: Climate neutrality (scope 1&2)

FrieslandCampina



2030: 33% GHG emission reduction

2050: Climate-neutral

Haleon



2030:

- 100% carbon emission reduction (scope 1&2)
 - 43% carbon emission reduction (scope 3)
- 2040:** Net zero carbon emissions

Heineken



2030: Absolute emission reduction across value chain

2040: Carbon-neutral operations

Henkel



2025: 65% CO2 emission reduction from operations per tonne of product (vs 2010)

2030: 30% emission reduction from raw materials and packaging per tonne of product (vs 2017)



2030: 100% electricity in production from renewable sources

Jacobs Douwe Egberts



2030:

- 25% absolute GHG emission reduction (scope 1&2 vs 2020)
- 12,5% absolute value chain emission reduction (scope 3 vs 2020)

Johnson and Johnson



2030:

- Carbon neutrality
- 20% absolute emission reduction (scope 3 vs 2016)



2050: 100% electricity from renewable sources

Kellogg



2030:

- 45% absolute GHG emission reduction (scope 1&2)
- 15% absolute GHG emission reduction (scope 3)



2050: 100% renewable electricity

Kraft Heinz



2030: 50% emission reduction

2050: Net zero carbon emissions



2025: Majority of electricity from renewable sources

Lactalis



2025: 25% GHG emission reduction (scope 1&2 vs 2019)

2033: 50% GHG emission reduction (scope 1&2 vs 2019)

2050: Net zero carbon

Lavazza



2025: Carbon-neutral

LEGO Group



2032: 37% absolute carbon emission reduction (vs 2019)



2032: 100% renewable energy

Levis



2025:

- 90% carbon emissions reduction in owned-&-operated facilities (vs 2016)
- 40% carbon emissions reduction across supply chain (vs 2016)



2025: 100% renewable electricity in owned & operated facilities

L'Oréal



2025: Carbon neutrality of all sites

2030:

- 25% direct and indirect GHG emissions reduction from product use (vs 2016)
- 50% GHG emission reduction linked to product transport (vs 2016)
- 50% suppliers' direct absolute emission reduction (vs 2016)



2025: 100% renewable energy

LVMH

(Louis Vuitton Moët Hennessy)



2026: 50% emission reduction from energy consumption at sites and stores (vs 2019)

2030: 55% GHG emission reduction or avoidance (scope 3)



2026: 100% renewable or low-carbon energy for all sites

Mars



2025:

- 27% total GHG emission reduction across value chain (vs 2015)
 - 42% emission reduction of own operation
- 2040:** Net zero emissions of own operations

2050: 67% total GHG emissions reduction across value chain (baseline vs 2015)



2040: 100% renewable electricity

McCormick



- 2025:**
- 20% absolute GHG emission reduction from facilities
 - 16% absolute GHG emission reduction along supply chain

- 2030:**
- 42% absolute GHG emission reduction from facilities
 - 42% absolute GHG emission reduction along supply chain

Mondelez



2025: 2025: 10% end-to-end CO2 emission reduction (vs 2018)

Nestlé



- 2025:** 50% GHG emission reduction
- 2050:** Net zero GHG emissions



2025: 100% electricity from renewable sources

Nike



2025: 70% absolute GHG emission reduction in owned or operated facilities



2025: 100% renewable electricity and fleet electrification

Nomad Foods



2030: 45% operational GHG emission reduction (vs 2019)

2050: Net zero emissions

Orkla



- 2025:**
- 65% GHG emission reduction from own operations (vs 2016)
 - 30% GHG emission reduction in the value chain (vs 2016)

- 2030:**
- 70% GHG emission reduction from own operations (vs 2016)

- 50% GHG emission reduction in the value chain (vs 2016)



2025: 60% renewable energy

PepsiCo



- 2030:**
- 75% GHG emission reduction from direct operations
 - 40% GHG emission reduction across value chain

Pernod-Ricard



2030: 54% absolute emission reduction (scope 1&2)

2030: 50% carbon footprint intensity reduction (scope 3)



2025: 100% renewable electricity for all offices and production sites

Philips



2025: 75% renewable sources

Procter & Gamble



- 2020:**
- 50% absolute GHG emissions reduction at facilities (vs 2020)
 - 40% supply chain GHG emission reduction

2040: Net zero emissions across operations



2030: 100% purchase of renewable electricity globally

Puma



- 2025:**
- 100% renewable electricity for own entities
 - 25% renewable energy for core suppliers

Reckitt



- 2030:**
- 65% GHG emission reduction in operations
 - 50% reduction in product carbon footprint

2040: carbon-neutral



2030: 100% renewable energy

Sanofi



2030: 55% GHG emission reduction from own activities

2050: Net zero emissions



2030: 100% renewable electricity across operations

Savencia Fromage & Dairy



- 2025:**
- 20% GHG emission reduction for production and transport (vs 2015)
 - Reduction of carbon footprint of milk collection by 300 kt of CO2 equivalent (vs 2010)

Signify



- 2030:**
- 70% absolute GHG emission reduction (scope 1&2 vs 2015)
 - 30% absolute GHG emission reduction from use of sold products (scope 3 vs 2015)

Sofidel



- 2030:**
- 40% CO2 emission reduction for cellulose pulp suppliers (scope 1,2&3)
 - 24% CO2 emission reductions for all other suppliers (scope 3)



2030: 84% energy from renewable sources

Unilever



- 2030:**
- 50% reduction in GHG emissions impact of products across their lifecycle (vs 2010)
 - 100% emission reduction (scope 1&2 vs 2015)



2030: 100% energy across all operations from renewable sources

How Brands engage Consumers in Sustainability



01

Easy, understandable and harmonised information about sustainable products, proper waste disposal, anti-littering and recycling for consumers is key. Such information enables them to contribute to proper waste management and to solving today's waste problem.

02

A "Nudge for Good" is how a brand, on the basis of consumer insights, makes it easy and desirable for people to change behaviour or habit and adopt a more sustainable lifestyle.

**NUDGING
FOR
GOOD**



03

AIM has developed the [Nudging for Good Toolkit](#), which provides practical guidance for brands on how to create nudges to help people adopt healthier and more sustainable lifestyles. Additionally, every two years, AIM organises the [Nudging for Good Awards](#) in order to promote the concept of "Nudges for Good" within our industry.

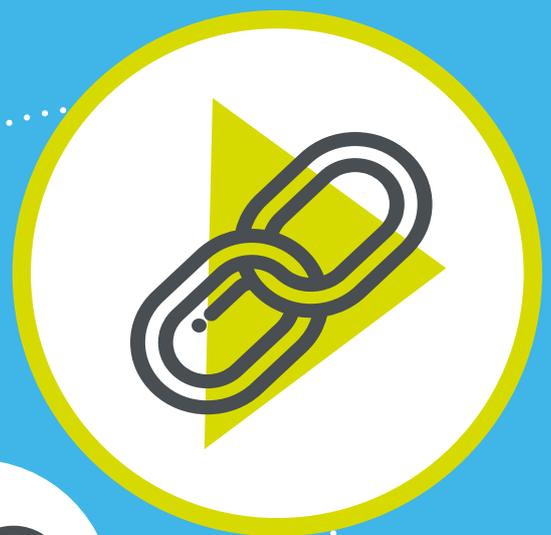
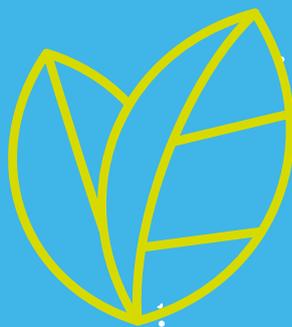
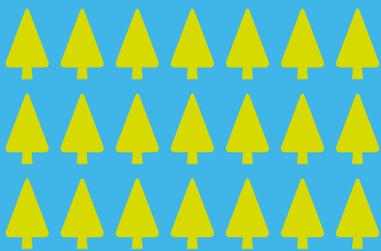
How Brands work along the Supply Chain

AIM-Progress:

Brands' Responsible Sourcing Initiative

A forum of leading Fast Moving Consumer Goods (FMCG) manufacturers and common suppliers, assembled to enable and promote responsible sourcing practices and sustainable supply chains. Our members work together to co-create solutions and share best practices to drive positive impact, quickly, efficiently and at scale, within the branded consumer goods supply chain. Our key objective is to build capability so that member organisations and their suppliers have the knowledge, confidence and ability to develop and execute robust responsible sourcing.

www.aim-progress.com





What needs to be in place for brand manufacturers to increase the recyclability of packaging?

- **Eco-design measures cannot be taken in isolation, but have to be addressed in an EU harmonised holistic way.** The full and consistent implementation and enforcement of the PPWD (Packaging & Packaging Waste Directive) Essential Requirements for packaging and the related CEN Standards should be the basis for any EU framework on packaging design.
- **The design and role of packaging cannot be divorced from the needs of the product as a whole.** Packaging plays a crucial role for society. It protects and preserves products as they transit through supply chains, ensures that consumers benefit from safe and high quality products and prevents product waste.
- **The design and role of packaging has to be based on a holistic life cycle analysis of the products and packaging concerned, rather than a sole end-of-life waste focus.**
- **Consistency between the Essential Requirements & eco modulation of EPR (Extended Producer Responsibility) fees is critical.** Both should provide a consistent and harmonised set of signals for packaging design and preclude divergent Member State provisions.

Framework conditions



What needs to be in place for brand manufacturers to further progress on the uptake of recycled content in packaging?

- **Secondary raw materials (SRMs) need to be available in the necessary quantity, appropriate quality (as established by 'end-of-waste' criteria) and at competitive prices:**
 - The uptake of recycled plastics content depends on the existence of functional markets for SRMs by 2025, with an appropriate infrastructure available for sorting and reprocessing where needed to ensure sufficient scale and material availability for the obliged industry.
 - Effective 'end-of-waste' criteria are a prerequisite to functioning markets for SRM. They are essential to provide the necessary reassurance to manufacturers, regulators and consumers for the use of recyclates.
- **Innovation and R&D should be encouraged as key drivers towards a Circular Economy:**
 - R&D support under framework programmes is key to ensure financial incentives for supporting close to market technologies for both materials and treatment technologies such as chemical recycling which is especially important for difficult-to-mechanically-recycle packaging.



What needs to be in place for brand manufacturers to ensure continued innovation, investment and growth in Europe?

- **Flexibility to innovate is crucial:**

Product design for the Circular Economy must continue to thrive on innovation. Research and innovation lie at the heart of the branded goods industry. Any concrete EU measure to promote the Circular Economy needs to provide sufficient stimulus and flexibility for innovation in product/packaging design, production, use and recovery. Design criteria should avoid locking producers into certain solutions, which could be outdated very rapidly.
- **Safeguarding the Internal Single Market for packaged goods is essential:**

To preserve the integrity of the internal market for packaged goods, EU legislation must not require (or even encourage) Member States to adopt national measures on packaging design as they risk being divergent. This could create a patchwork of conflicting national packaging design requirements.