The 8 gaps along the plastics value chain ***at a glance***

At TOMRA, we have identified

8

gaps along the plastics value chain: **design, quantity, quality, affordability, perception, alignment, data, and policy.**

1. Design gap

Products and packaging are not designed for functionality, reuse, recycling, or recycled content. This makes it difficult to keep materials in a closed loop. In a circular economy, products and packaging must be designed to be kept at their highest and best use for as long as possible.

2. Quantity gap

There is not enough plastic waste collected for recycling to turn into recyclates. To meet recycling and recycled content targets, the market requires scaled-up recovery: more plastic must be collected, sorted, and recycled from waste that would otherwise end up in landfills, incinerators, and littered in the environment.

3. Quality gap

There is a lack of high-quality recyclates of a consistent quality. High quality recyclates are necessary in large scale applications like consumer goods packaging. Special quality demand is required for cosmetic grade, and even more so when it comes to food-grade. Producing recycled content for consumer-packaged goods requires advanced recycling practices and innovative sorting technologies.

4. Affordability gap

Some products and packaging containing recyclates are more expensive than equivalent products made from virgin material. Recyclates must be cost-effective against those virgin materials. To make recyclates affordable there are two levers: Policy to provide a level playing field and economy of scale for recycling processes.

5. Perception gap

There is still a disconnect between reality and what consumers and stakeholders (brands, the chemical industry, etc.) believe. For example, recyclates are still perceived as inferior to virgin materials. Increasing awareness of the circular economy for plastics needs educational programs to encourage behavioral changes.

6. Alignment gap

There are multiple, differing viewpoints on the problems and solutions to end plastic waste. Various parts of the value chain have different incentives and targets. Furthermore, not all parts of the value chain will equally benefit from the transition. Accelerating the circularity of plastics requires collaboration, support and alignment across different stakeholder groups (producers, users, recyclers).

7. Data gap

There is a lack of reliable, accurate data and transparency at all points in the plastics value chain. There is also a lack of standards, as well as information on how and what to measure. Establishing trust in circular plastics demands data integrity and data quality.

8. Policy gap

There is an absence of imperative and incentive for stakeholders to implement strategies that will help the shift towards a circular economy. Enabling a level-playing field requires policymakers to create environmental policy frameworks that can translate the vision of a circular economy into concrete targets and requirements.

All eight gaps must be addressed to close the loop on plastics. While many solutions already exist to address all of them, TOMRA's focus is on enabling closing the quantity gap, by rescuing a large amount of waste via mixed waste sorting, and the quality gap, by ensuring high-quality recyclate with advanced mechanical recycling and chemical recycling.

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