



LEEDS BECKETT UNIVERSITY
LEEDS BUSINESS SCHOOL

SUSTAINABLE STRATEGIES OF UK RETAILERS – CASE STUDY

INTERGRAF CONFERENCE
9 MARCH 2023

THE RETAIL INSTITUTE





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The Retail Institute is an academic research centre providing consumer driven strategies for future innovation.

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MARKET
INTELLIGENCE



CONSUMER
INSIGHTS



PRODUCT
INNOVATION



FUTURE
STRATEGIES

APPLIED RESEARCH



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Waitrose



Kraft *Heinz*



ASDA

MARS



Huhtamaki

M&S

TWININGSTM
OF LONDON



COVERISTM



DIAGEO



BASF
We create chemistry





REDUCE/REMOVE	RECYCLE/REUSE	RECYCLED CONTENT
<p>Sainsbury's: Reduce plastics by 50% by 2025</p> <p>Morrisons: 50% reduction in own brand primary plastic packaging vs 2017 baseline</p> <p>Tesco: Reduce all unnecessary packaging</p> <p>M&S: 30% reduction in the volume of plastic food packaging by 2027</p> <p>ALDI: Reduce plastic packaging by 50% by 2025 (2019 baseline)</p> <p>LIDL: By 2025, reduce own label plastic packaging by 40% relatively against a 2017 baseline</p> <p>ASDA: Remove three billion individual pieces of plastic by 2025</p> <p>Tesco: Remove plastic packaging where we can</p>	<p>ASDA: All packaging being recyclable by 2025</p> <p>Morrisons: 100% of plastic packaging recyclable, reusable or compostable</p> <p>Morrisons: 70% of plastic packaging to be recycled</p> <p>Tesco: Our packaging will be fully recyclable by 2025</p> <p>Waitrose: All own-brand packaging reusable or made from widely recyclable or home-compostable material by 2023</p> <p>M&S: 100% of food packaging to be recyclable by 2022</p> <p>ALDI: 100% of own label packaging reusable, recyclable or compostable by 2022 (and branded products by 2025)</p> <p>LIDL: By 2025, 100% of own label & branded packaging to be recyclable, reusable, refillable or renewable (90% by 2023)</p>	<p>ASDA: To reach at least 30% recycled content in Asda Brand packaging</p> <p>Morrisons: 30% average recycled content in our plastic packaging</p> <p>ALDI: 50% of plastic packaging to be made of recycled content by 2025</p>



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LEGISLATIVE & VOLUNTARY PLASTIC INITIATIVES



Extended Producer Responsibility



Deposit Return Schemes



Plastic Packaging Tax

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PLASTIC PACT ROADMAP 2022

<p>1. Plastic wrapping for multi-sales of tins, bottles and cartons</p> 	<p>2. PVC cling film</p> 	<p>3. Non-compostable fruit/veg stickers</p> 
<p>4. Non-compostable tea and coffee bags</p> 	<p>5. Single-use, single-serving plastic sachets/jiggers in restaurant settings</p> 	<p>6. Plastic packaging for uncut fresh fruit and vegetables unless it is demonstrated to reduce food waste</p> 

	Significant opportunity to prevent household food waste by selling loose	Peelable item	Already sold loose by at least one major retailer
Apples & Pears	🍏		🍏
Aubergines	🍆		🍆
Avocados	🥑	🥑	🥑
Bananas	🍌	🍌	🍌
Broccoli, Cabbage & Cauliflower			🥦
Carrots, Courgettes, Leeks & Parsnips	🥕		🥕
Garlic & Ginger	🧄	🧄	🧄
Oranges, Lemons & Limes	🍊	🍊	🍊
Mangos	🥭	🥭	🥭
Onions	🧅	🧅	🧅
Peppers & Tomatoes	🌶️		🌶️
Potatoes	🥔		🥔
Squash & Swedes		🍠	🍠

PLASTICS PACT RECYCLABILITY

<p>Mono-material rigids (PET, PP, HDPE, LDPE) and Pouches, PE films and bags</p>	<p>Laminates excluding those in red, PE Nets, No material info but OPRL Recycle</p>	<p>PET/PE trays and films, PA containing laminates, EVOH containing laminates, No material info and OPRL Don't Recycle or No OPRL information</p>
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THE RETAIL INSITUTE BRIEF

A UK Retailer commissioned The Retail Institute to conduct research into the current and future use of plastics packaging with the aim of supporting their plastics reduction commitment and the move to carbon neutrality.

OBJECTIVE 1: PLASTIC REDUCTION

OBJECTIVE 2: MAKING PLASTIC EASIER TO RECYCLE

OBJECTIVE 3: GIVING NON-RECYCLABLE PLASTIC NEW LIFE WITH OUR TAKE-BACK SCHEME



STAGE 1: Audit of Food Packaging & Sector Analysis

STAGE 2: Roadmapping

STAGE 2A: NEW HIGHLY RECYCLABLE MATERIALS FOR FOOD PACKAGING
STAGE 2B: BIOPLASTICS
STAGE 2C: DEMAND AND COST ESTIMATION (TECHNO-ECONOMIC ANALYSIS)

STAGE 3: New Business Models Towards 100% circularity



NO	CODE	CATEGORY
1	F01	★ Poultry
2	F02	Frozen
3	F03	Global Meal Solutions
4	F04	Cook
5	F05	Delicatessen
6	F06	Dairy
7	F07	Food on Move
8	F08	Desserts
9	F09	Bakery
10	F10	Biscuits
11	F12	Snacks
12	F13	Confecionery
13	F14	Flowers
14	F15	★ Vegetables
15	F16	Salads
16	F19	Groceries
17	F20	Wine
18	F21	Beers & Spirits
19	F27	In Store bakery
20	F30	Juice
21	F32	Cards & Wrap
22	F33	Ambient Celebration
23	F35	Home Care
24	F38	★ Meat
25	F44	Flowers
26	F61	★ Fruit
27	F63	Traditional Meal solutions
28	F64	Healthy Meal solutions



FRESH PRODUCE: FRUIT

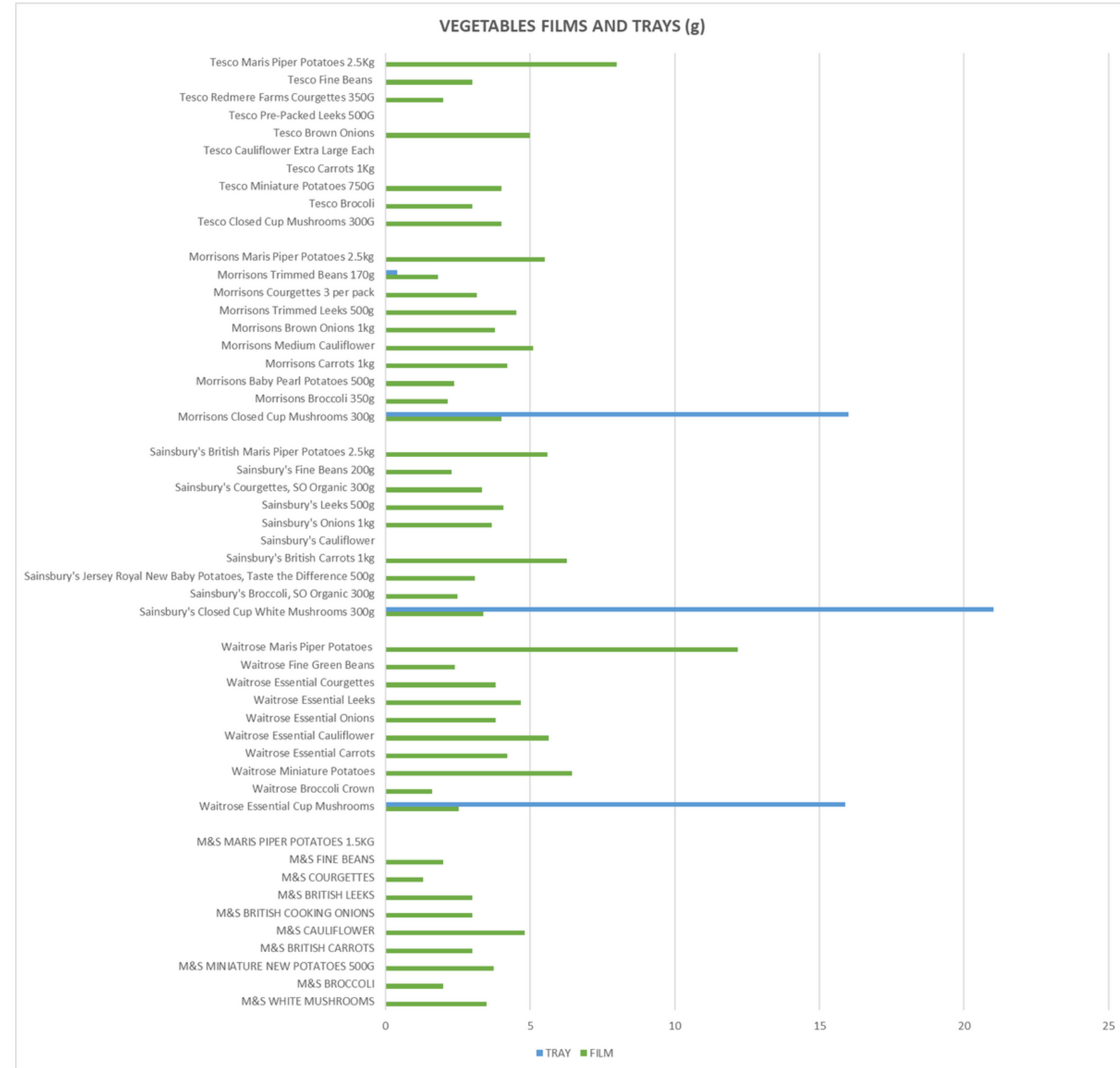


FRESH PRODUCE: VEGETABLES

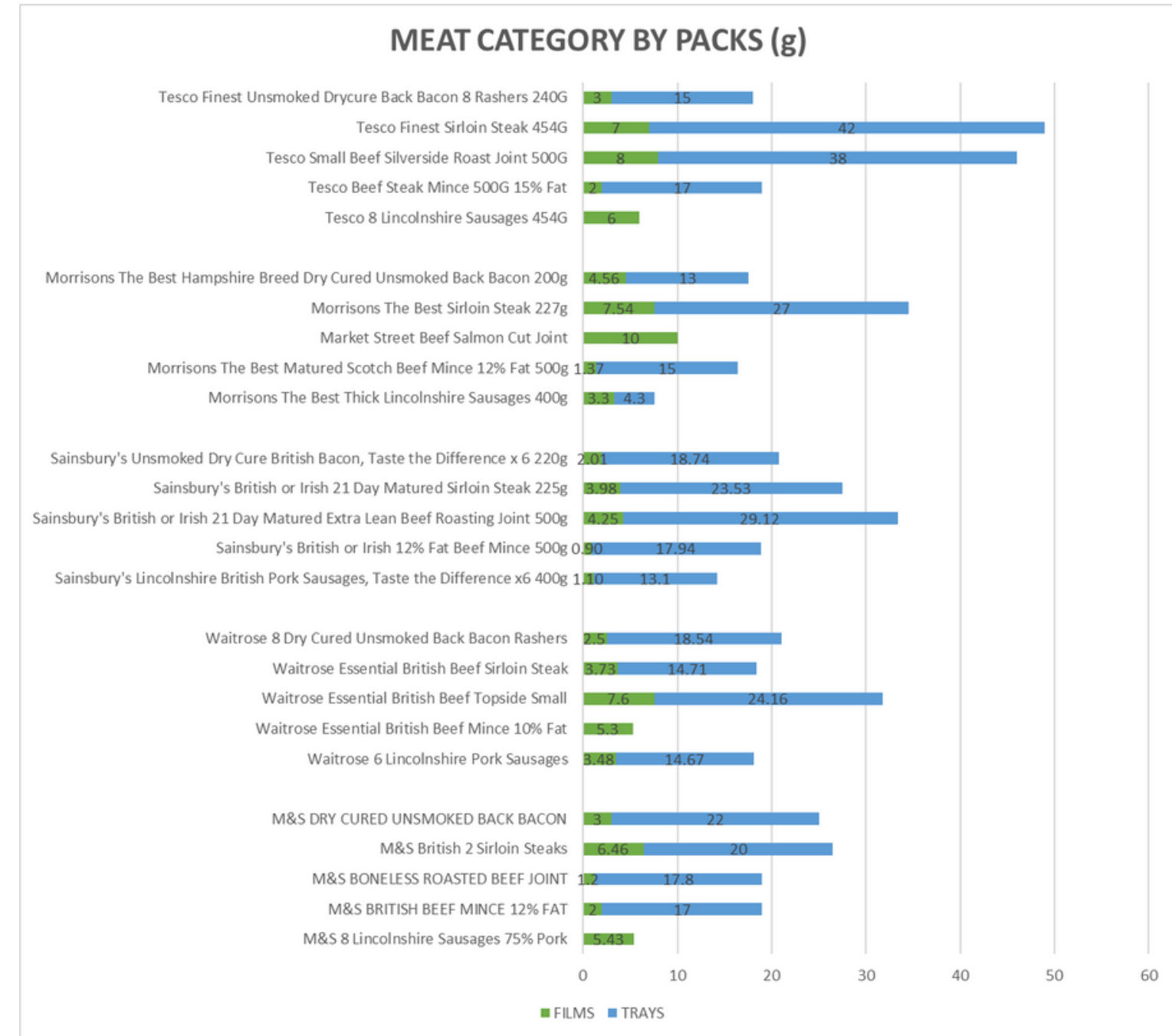


9 days + 2 ambient

15 days + 5 ambient



ANIMAL PROTEIN



ANIMAL PROTEIN



- PE/PET
- PET/PP
- OPP/PE-EVOH-PE
- BOPP/PE/PA/EVOH/PA/PE
- PE/EVOH
- PA/EVOH/PE
- BOPET/PE/EVOH/PE/PET
- PA/EVOH/PE



INNOVATIONS IN OTHER CATEGORIES



CIRCULAR BUSINESS MODELS



Thank you
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