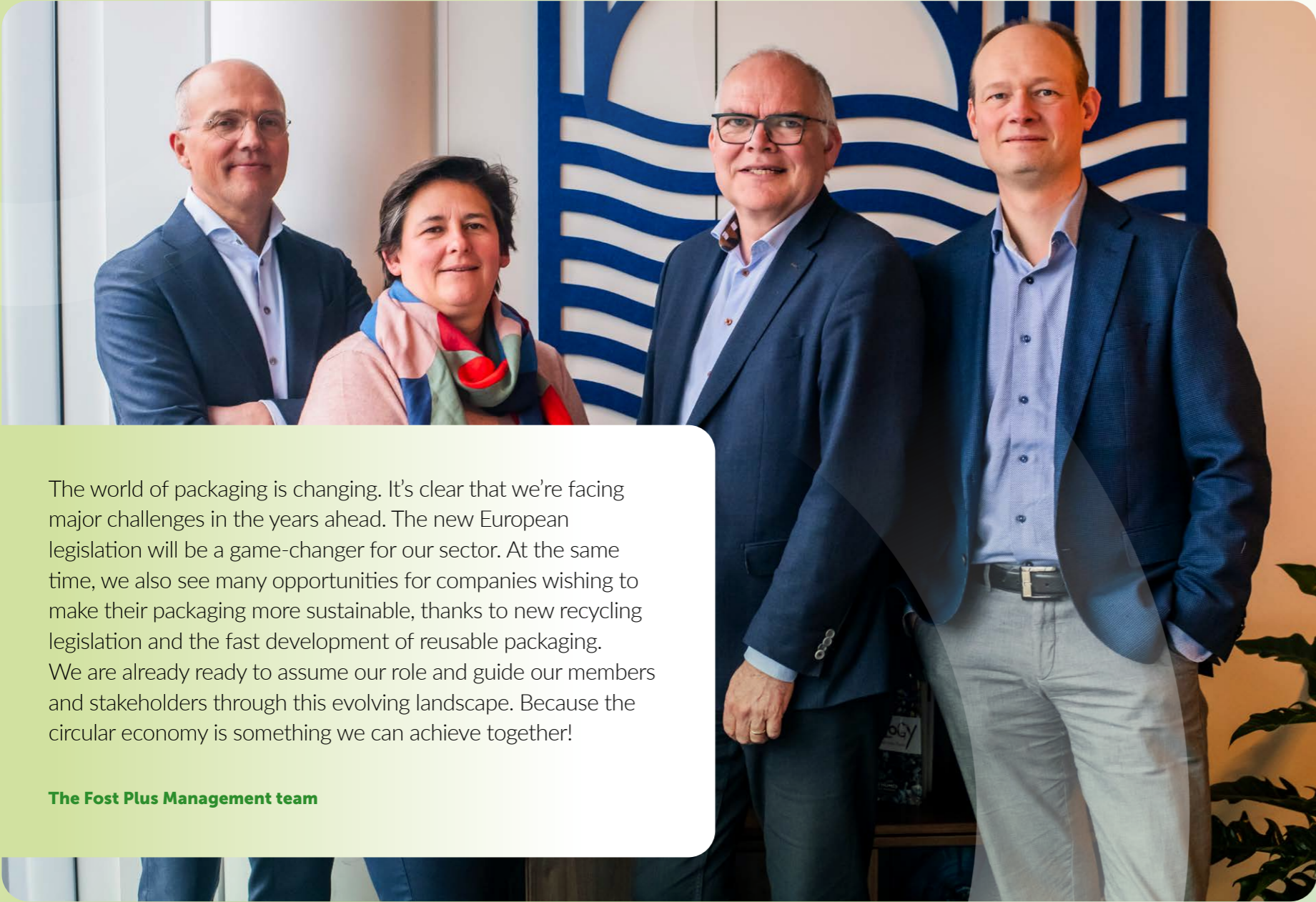




Activity Report 2024





The world of packaging is changing. It's clear that we're facing major challenges in the years ahead. The new European legislation will be a game-changer for our sector. At the same time, we also see many opportunities for companies wishing to make their packaging more sustainable, thanks to new recycling legislation and the fast development of reusable packaging. We are already ready to assume our role and guide our members and stakeholders through this evolving landscape. Because the circular economy is something we can achieve together!

The Fost Plus Management team

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Key Figures 2024

01

Papiers-Cartons
Papier-Karton



Key figures 2024

728,392 T

of single-use packaging reported by Fost Plus members

557,364 T

of reusable packaging placed on the market by Fost Plus members



In 2024, we saw another decrease in the amount of single-use packaging placed on the market (by weight). This decline can be attributed, on the one hand, to the continued focus on eco-design and improved packaging design, leading to lighter and more efficient packaging. On the other hand, the prevention efforts made by companies are starting to pay off.

Following a sharp drop in reusable packaging during the COVID-19 pandemic, the share of reusable packaging in 2024 has nearly returned to pre-pandemic levels.

930,885 T

single-use household packaging collected from Belgian households

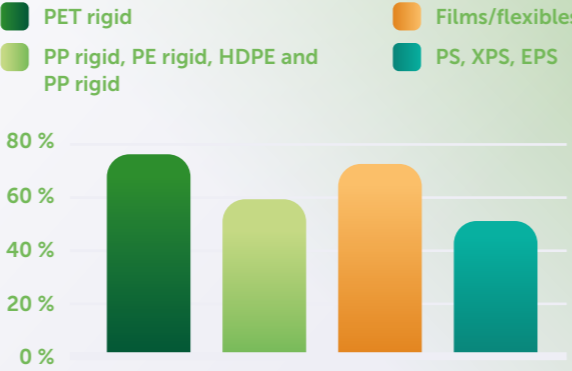
839,114 T

single-use household packaging recycled

Recycling rate by category

(in relation to Fost Plus members)

Fost Plus has produced an initial indicative estimate of the plastics recycling rate by packaging category, as stipulated in Annex II of the PPWR. For the assessment of recycling targets, only the overall target applies.



Fost Plus calculates recycling rates based on the tonnages reported by its members. This approach is fully aligned with the provisions of the Belgian Interregional Cooperation Agreement. Around 84% of all single-use household packaging on the Belgian market (by weight) originates from Fost Plus members. However, the total amount collected and recycled also includes packaging that was not placed on the market by Fost Plus members – which explains why the recycling rate exceeds 100% for certain materials. This includes:

- Packaging from companies that consciously or unconsciously **evade their take-back obligations** (so-called “free-riders”)
- Packaging from products purchased by consumers **abroad** (e.g. cross-border wine and champagne purchases in France, which have a significant impact on the glass figures)

It is worth noting that Fost Plus members also bear the costs for these materials. The IRPC then reports the consolidated figures for the total household and commercial packaging market to the European authorities.

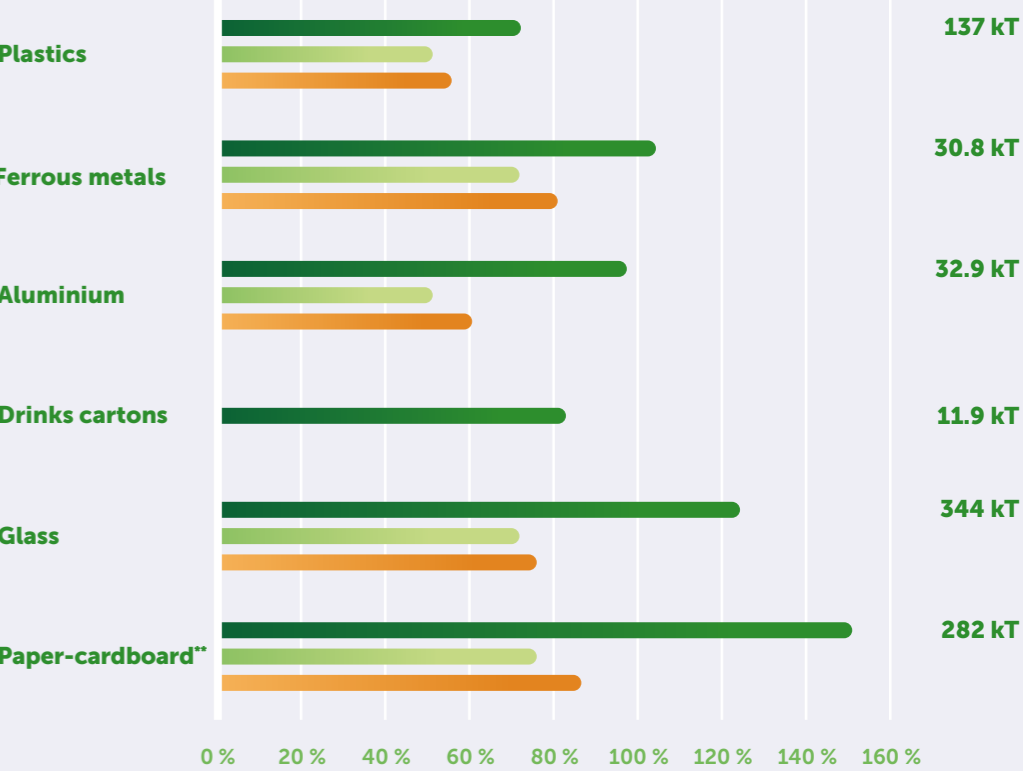
Saved CO2

651 Kton CO2 saved as a result of the recycling of single-use packaging that was selectively collected

Recycling rate and tonnes recycled 2024 (in relation to Fost Plus members)*

EU target 2025

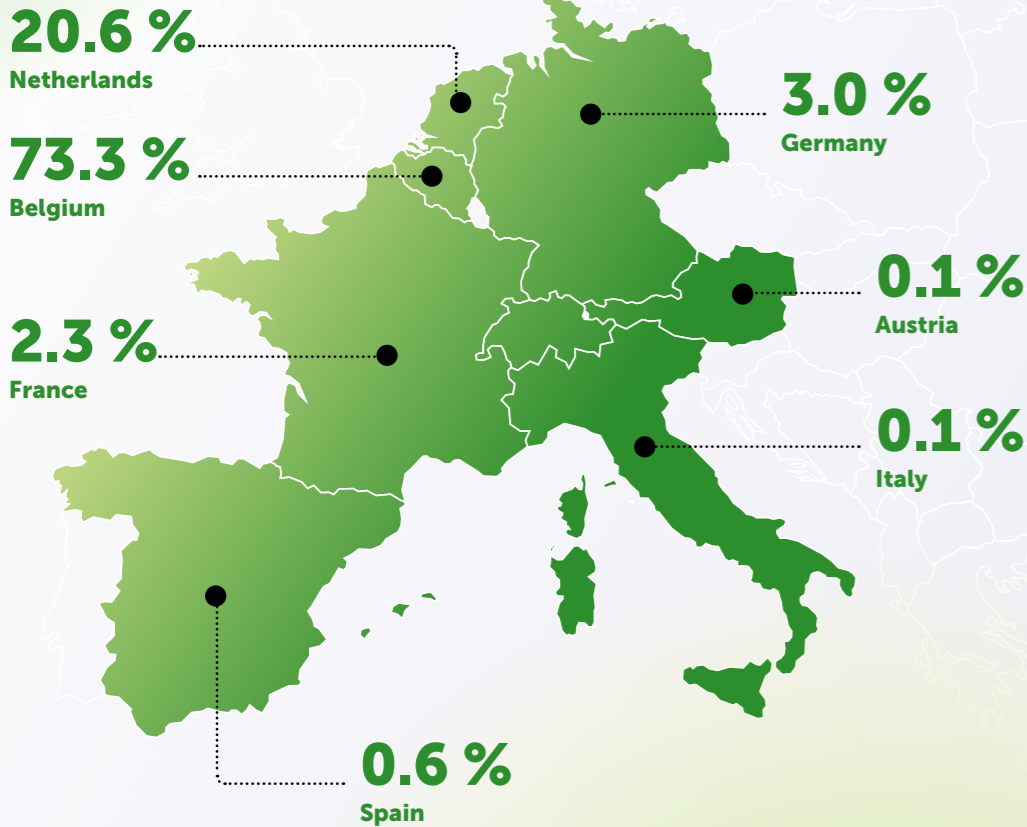
EU target 2030



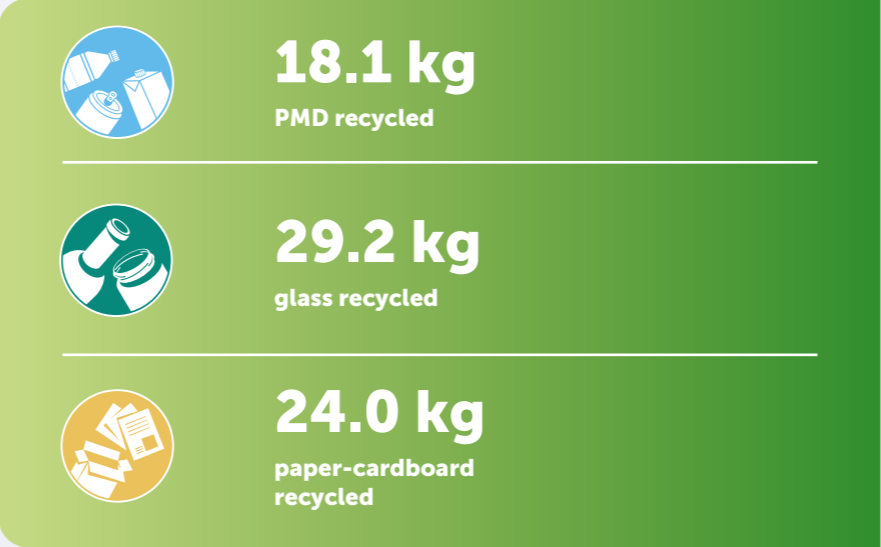
*These figures are also subject to minor changes relating to late declarations and additional checks.

** The paper-cardboard recycling rate is significantly higher than in 2023 due to a new packaging/non-packaging allocation key for paper collection, as established by the Interregional Packaging Commission. Fost Plus and Valipac are working on a new estimate of the total market for household and industrial paper and cardboard packaging. This should enable clearer recycling rates to be communicated in the future, both in relation to market share and to the total market.

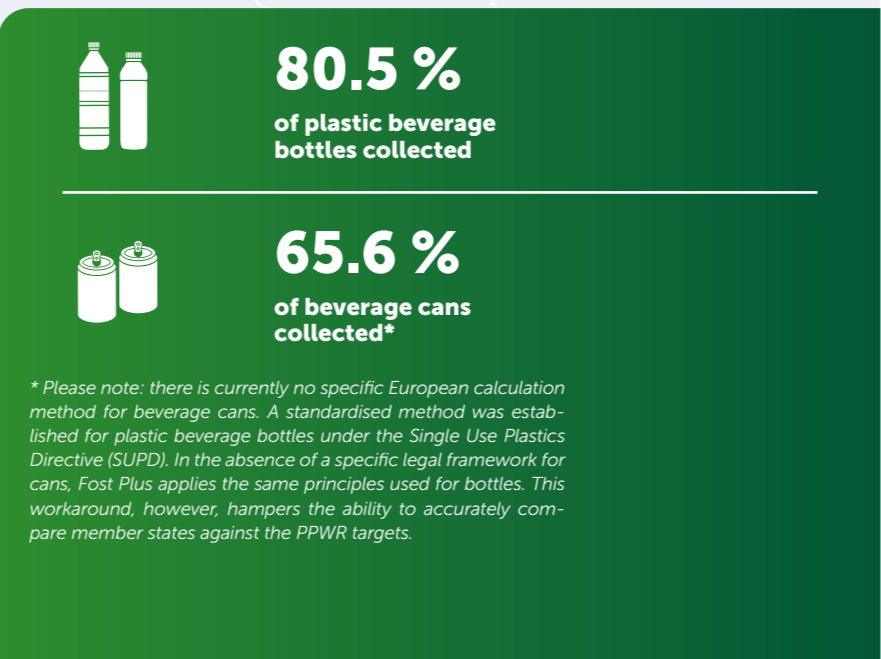
WHERE ARE THE COLLECTED MATERIALS RECYCLED?



PER RESIDENT



BEVERAGE PACKAGING



Fost Plus as organisation





What is every euro spent on?

COLLECTION

Door-to-door collection of PMD and paper/cardboard, installation and maintenance of public glass bottle banks, and transport of the collected packaging to sorting centres and recycling companies. Installation and maintenance of underground containers, collection at the recycling park, and administrative costs of the intermunicipal companies.

SORTING

Compensation for sorting centres for sorting PMD into 16 material types.

POST-SORTING OF RESIDUAL STREAMS

Costs for post-sorting residual streams from PMD sorting centres and for thermal valorisation (incineration with energy recovery) of non-recyclable materials and packaging.



LITTER

Financing of the regional cleanliness networks Be WaPP, Mooimakers, and Brussels for prevention, awareness-raising, infrastructure, and various other initiatives.

SUSTAINABLE PACKAGING

Action programme on prevention, reuse, and eco-design, financing of regional initiatives on packaging waste management and prevention, and quality controls in sorting centres and recycling companies.

MARKETING & COMMUNICATION

Communication with consumers, members, and stakeholders, and support for local communication by municipalities and intermunicipal associations. National and local campaigns, such as the 2024 national campaign on sorting quality: "If it's packaging, it can go in the blue bag". Support, promotion, and financing of selective collection at companies and in sectors such as the hospitality industry, hospitals, events, and schools.

DAY-TO-DAY OPERATIONS

These include personnel costs, insurance, building rental, maintenance and management of the IT and other technical platforms that support our day-to-day operations.



02

Social challenges in a changing world

Consumer awareness about environmental issues has increased significantly over the past decade. This is also evident from the Environmental Barometer, a large-scale survey we conducted in 2024. More than half of Belgians consider climate change to be one of the biggest problems we are facing today.

The role packaging plays in all this cannot be underestimated. Consumer concern about its impact has grown significantly, and they expect companies to take action. Almost 60% of Belgians look to packaging manufacturers to provide

them with better information and offer better choices.

Recyclability is now seen as the absolute minimum, while the use of sustainable materials and alternative packaging systems is gaining importance. The final

destination of used packaging is also being scrutinised. Consumers want to know where and how materials are processed. These concerns are not only shared by citizens; they are also reflected in new and increasingly stringent legislation.



03

Impact for a more sustainable packaging chain



Impact for a more sustainable packaging chain

Fost Plus was initially founded by our members as a collective organisation to meet their collection and recycling obligations. Today, as a central hub in Belgian packaging management, we respond to consumer concerns and support our members and partners in the transition to a more sustainable packaging chain. In this regard, we have identified three focus areas:



SUSTAINABLE PACKAGING

By developing sustainable packaging systems with a focus on prevention, reuse, and recycling, we reduce greenhouse gas emissions and contribute to the responsible use of raw materials.



LOCAL ECONOMY

By processing packaging close to home – preferably in our own country – we create fertile ground for innovation, investment, and sustainable jobs.



CO-CREATION

By uniting all parties in the chain, we are jointly developing the ecosystems of the future.



FOCUS

Europe sets the bar high

With the new Packaging and Packaging Waste Regulation (PPWR), the European Commission is introducing ambitious targets for the packaging sector. The amount of packaging waste per capita must be significantly reduced, and to achieve this, the main focus is on the development of reusable packaging systems. In addition, the criteria for the recyclability of packaging will become much stricter, and minimum requirements for the use of recycled material in all packaging will be introduced.

“

It is clear that the new European regulations will have a major impact – not only on our members, but on everyone active in the chain. We are ready to guide them through this complex process and help them achieve the ambitious European targets.’

Thomas De Meester,
Public & Regulatory Affairs Manager



Sustainable
packaging

04



Sustainable packaging

Packaging plays an important role in our daily lives and in our economy. However, its impact is also raising more and more questions among consumers and governments. No less than 80% of Belgians say that there is too much (disposable) packaging. There is a clear need for innovative and sustainable packaging systems, with an increasing focus on prevention and reuse. In addition, the use of recycled content and maximum recyclability also present challenges. We support our members in achieving their legal objectives and their own ambitions.



Thanks to our central role in the Belgian packaging landscape, we are uniquely positioned to bring the right partners together. This enables us to accelerate the development of reusable packaging systems and support the many promising initiatives taking their first steps.'

Hélène Snyers, Reduce & Reuse Expert

Reusable packaging – learning and innovating together

Reusable packaging is slowly but surely making its way into various sectors. Just

think of the reusable cups now common at festivals and events. However, their introduction often comes with important challenges – you can't simply replace one type of packaging with another. To make large-scale reuse an economic and ecological success, more standardised packaging and efficient logistics systems for collection, transport, and cleaning are needed. Ease of use, cost, and hygiene are crucial factors in getting consumers on board.

New sources for recycled content

The search for new, high-quality recycling applications is becoming essential in the light of new European regulations, which make the use of recycled materials mandatory in all packaging. For PET bottles and metal beverage cans, these targets are within reach. For other materials, such as polystyrene and polyethylene, this is less straightforward, as purely mechanically recycled materials are not suitable for food packaging. Innovative technologies offer promising solutions.



Chemical recycling

At Indaver's new Plastics2Chemicals plant in the Port of Antwerp, plastics will be transformed into polymers as pure as virgin plastics – making them suitable for demanding applications, including food packaging. In the course of 2025, the entire plant will be running at full capacity to process blue bag packaging, including PS yoghurt pots, meat trays and mushroom trays. CITEO, the French counterpart of Fost Plus, already supplies material to the plant. In 2024, Indaver successfully transformed its first batch of polystyrene from the blue bag and converted in their first plant into an intermediate product to feed the plant at the Port of Antwerp.

Watermark technology

The HolyGrail 2030 initiative is exploring the potential of digital watermarks to improve the accuracy of material streams sorting. These watermarks are applied directly to packaging and contain detailed information about its composition and contents, en-

abling sorting lines to distinguish between food and non-food packaging. This makes true 1-to-1 recycling of food packaging possible.

CONTACT POINT FOR SUPERFLUOUS PACKAGING GETS A MAKEOVER

In 2024, the Contact Point for Superfluous Packaging received a complete overhaul. The redesigned website now makes it even easier for consumers to report packaging they consider unnecessary, while also providing immediate answers to the most frequently asked questions. We also streamlined the internal process, enabling our members to respond more quickly and efficiently.





Local economy

The packaging we collect from Belgian households has been recycled close to home for many years. In 2024, we continued to invest heavily in expanding local recycling capacity. This enables us to guarantee our members – and Belgian consumers – that their packaging is genuinely recycled. The recycled materials are also made available as raw materials for our members, while we help create new, sustainable jobs.

Recycling markets for plastics under pressure

The European recycling markets continued to face significant challenges in 2024. Prices for virgin plastics remained historically low, causing the use of recycled content to stagnate. At the same time,



The economic context makes the development of sustainable recycling markets in Europe particularly challenging. With Fost Plus, we are making a real difference by offering our partners long-term prospects and investing together in local recycling capacity.'

Mik Van Gaever, COO

high energy prices made it even harder for European recycling companies to compete with the influx of cheap plastics from outside the EU. By investing alongside the sector, we are proving that a different approach is possible, while positioning Belgium as a leader in recycling and sustainable raw materials management.

Focus for 2024: the fight against residue

Over the past year, we observed a sharp increase in residue in the collected PMD. Since the expansion of the sorting rules, many more types of packaging are allowed in the blue bag, but some people seem to be interpreting the new guidelines too loosely. In 2024, sorting centres received no less than 40,000 tons of incorrectly sorted material – the equivalent of 10 million PMD bags filled with items that do not belong there.

Residue in PMD bags is less harmless than it appears. The presence of batteries, electronic devices, and gas cylinders creates serious fire and explosion hazards, leading to unsafe working conditions in the sorting centres. Moreover, the machines are not designed to handle large or heavy items such as toys or shoes. As a result, many materials that could otherwise be perfectly recycled are lost.

In 2024, we collaborated with the sorting centres to map residual waste streams in detail, helping us better understand their origin and volume. We are working closely with intermunicipal companies and waste processors to take appropriate action. For example, an extensive training programme was organised for recycling centre attendants and collectors, enabling them to intervene directly at the source. Additionally, the issue became the central theme of our new national awareness campaign.





‘Without the daily efforts of citizens, we would be nowhere. With the new campaign, we are giving their sorting behaviour a nudge in the right direction. Not with a patronising finger or pompous messages, but in a playful and accessible way.’

Pascale Müller,
Communication Advisor

Singing chicken encourages sorting behaviour

In September 2024, we launched a national campaign on radio, television, and social media under the slogan "If it's a packaging, it can go in the blue bag!" The campaign features a singing toy chicken that has ended up in a blue bag and clearly doesn't feel at home there. With a cheeky nod to popular culture and a catchy tune that sticks in your head, we remind consumers that their sorting behaviour really does make a difference. The successful campaign was repeated in early 2025 and will return again in the fall.

Co-creation



A look behind the scenes

PEOPLE MAKE THE CIRCULAR ECONOMY

The circular economy is driven by innovation, co-creation, and collaboration across the entire chain. But above all, it is powered by people. We would like to thank our employees and partners for their enthusiasm and the excellent work they have delivered over the past year. On the following pages, they will share the many projects they have helped bring to life.

MEMBERS



Design4Recycling – the last mile is the hardest

Belgian companies have committed to finding a solution for all non-recyclable packaging on the market by the end of 2025. By the end of 2024, 7 kT remained, representing less than 1 % of the packaging on the market.

‘Our members have already made significant progress toward their targets. In 2024, we again saw a lot of difficult-to-recycle packaging disappear from store shelves. But, as always, the last mile is the hardest. The focus is now on the packaging of a number of very specific and challenging product groups, including dairy, smoked fish, and pet food. By pointing the way to sustainable alternatives, we are giving the members involved an extra push.’

Annemarie Abbeel,
Design for Recycling Senior Expert



COMPANIES & ORGANISATIONS



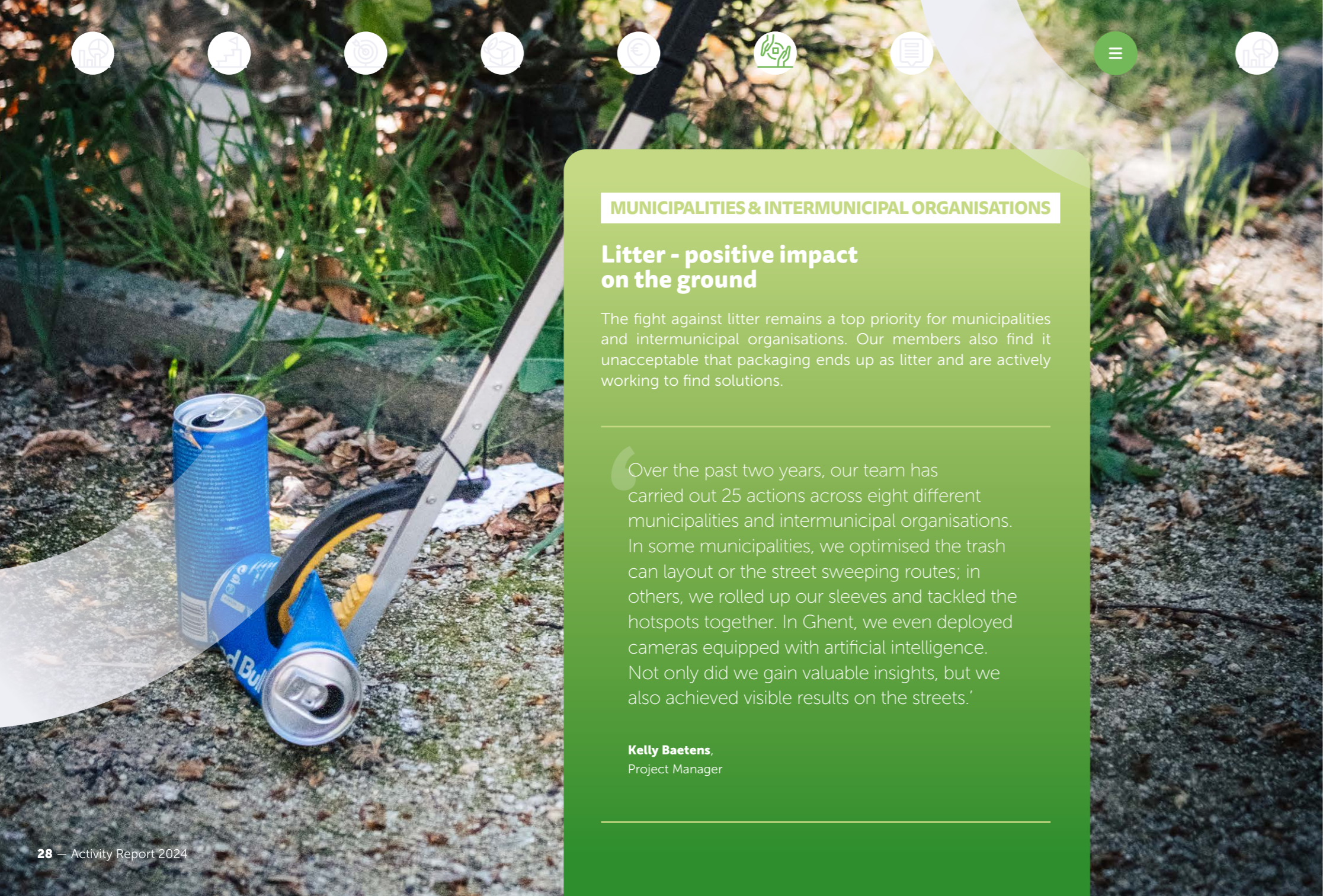
Dating tool for prevention and reuse

The Reduce & Re-Use MatchMaker is a new online platform designed to help organisations find partners for packaging re-use and prevention. The project is one of many new initiatives that emerged from our Innovation Lab.

‘The market for reusable packaging is booming, but it often involves small-scale and local initiatives. We noticed that many organisations find it challenging to identify what solutions are already available. That’s how the idea for MatchMaker emerged. Using a simple search function, organisations can quickly find a potential partner for their project and get started right away. This way, we accelerate the development and spread of new systems, business models, and technologies.’

Anne Poggenpohl,
Reduce and Reuse Expert





MUNICIPALITIES & INTERMUNICIPAL ORGANISATIONS

Litter - positive impact on the ground

The fight against litter remains a top priority for municipalities and intermunicipal organisations. Our members also find it unacceptable that packaging ends up as litter and are actively working to find solutions.

Over the past two years, our team has carried out 25 actions across eight different municipalities and intermunicipal organisations. In some municipalities, we optimised the trash can layout or the street sweeping routes; in others, we rolled up our sleeves and tackled the hotspots together. In Ghent, we even deployed cameras equipped with artificial intelligence. Not only did we gain valuable insights, but we also achieved visible results on the streets.'

Kelly Baetens,
Project Manager

SORTING AND RECYCLING CENTRES

New recycling plant for complex PET packaging

In July 2024, Morssinkhof-Rymoplast, Fost Plus, and Idelux laid the foundation stone for MOPET, a new recycling centre in Neufchâteau. The plant will be one of the first in Europe to recycle PET trays and opaque PET bottles – such as milk bottles – on a large scale into high-quality materials that can be reused for beverage and food products.

'With an annual capacity of 40,000 tons, MOPET will play a crucial role in meeting new European legislation, which sets minimum requirements for the use of recycled content in plastic packaging. At the request of our members, we also began working in 2024 on finding a solution to capture opaque PET trays that still slip through the net in our sorting centres. To address this, we collaborated with our partner Vanheede, which processes the residual flows from the sorting centres.'

Philippe Gendebien,
Business Development Cluster Manager





CONSUMERS

One million users for Recycle!

In 2014, we launched the Recycle! app in collaboration with Bebat to help Belgians sort more and sort better. In 2024, we reached the milestone of more than one million active users.

‘In ten years’ time, Recycle! has become the go-to app for everything related to waste sorting. You can check the collection rounds in your street, the opening hours of the recycling centre, or find the nearest Bebat collection point. Municipalities and intermunicipal companies can also use the app to send messages directly to their residents. We recently added a feature to help users with any sorting doubts: the search function instantly tells you where your packaging belongs. And we have a few more exciting surprises in store for the future!’

Bart Panneels,
Engagement Officer



MEMBERS

Collaboration with GS1 simplifies exchange of packaging data

GS1 Belgium & Luxembourg and Fost Plus have signed a co-operation agreement for the exchange of (packaging) data. The partnership will make it easier for companies to manage and share data about their products and packaging. This is necessary because such data plays an important role in the ongoing transition to a circular economy. In addition, the PPWR is demanding increasingly detailed information about the packaging placed on the market.

‘To organise collection, sorting, and recycling efficiently, we ask our members to report on their packaging in as much detail as possible. By working with GS1, we avoid duplication of work and help reduce their administrative burden. At the same time, it lowers the risk of errors and improves the quality of our data, giving us a clearer overview of the market.’

Joeri Deswarte,
Account Management Members Team Leader





PMD-COMPANIES

More PMD in companies thanks to joint efforts

Companies are sorting more and more PMD, and that's a good thing. Our constant efforts over recent years are clearly bearing fruit. In 2024, quantities collected even increased by 37%. However, quality remains a point of attention.

In fact, we find that PMD from companies generally contains far more residues than that from households. To improve quality, we work closely with all partners in the chain. The transfer centers carry out visual checks on incoming bags before they are sent to the sorting centers. When the quality is too poor, they have to be redirected to another processing facility. But we also focus on raising awareness, notably through the "sortstore" communication material and targeted campaigns aimed at businesses."

Greet Hofman,
Project Manager





Conclusion

2024 was another exciting year for Fost Plus. It marked the first year of our new accreditation period, during which we further expanded our social role. Attentive readers of this Activity Report will certainly have noticed that the Fost Plus team has already taken several important steps in this area.

For example, a stronger focus on prevention and re-use has already led to concrete achievements, and in the field of eco-design we are taking the lead – together with our members – to make sustainable packaging the norm. These initiatives are crucial as we move toward compliance with the new European Packaging and Packaging Waste Regulation (PPWR), which will radically reshape the packaging landscape and was published in its final form at the end of 2024.

In addition, several changes have been made to Fost Plus' internal organisation. With a newly composed Board of Directors, we have redesigned our governance structure to enable stronger decision-making, with greater transparency and clearer delineation of roles.

At the end of September, we also welcomed a new CEO – a familiar face to many. Francis Huysman, who was involved in the establishment of Fost Plus from the very beginning and later led our sister organisation Valipac for many years, has now taken the helm.

As CEO of both organisations, he is ideally positioned to strengthen collaboration between Fost Plus and Valipac, while respecting their autonomy and individuality. This enhanced cooperation will help us tackle future challenges and further optimise the services we provide to our members.

For me, this conclusion also marks my departure as Chairman of Fost Plus. It has been an exciting three years – and a true privilege to work behind the scenes of this wonderful organisation. I would like to take this opportunity to wish my successor every success. There are many challenges ahead, but I am convinced that as an organisation, we are more ready than ever to meet them!

Jan Vander Stichele, Chairman of the Board



It has been a true privilege to work behind the scenes of this wonderful organisation.



Questions?

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