

Task 4.2.5 Transferability Plan for the meat industry supply chain in FRANCE

TRANSFERABILITY PLAN

Meat to catering industry

01. Strategic phase

01.1. Identification of the target supply chain(s) that will benefit of the transferability action

Type of supply chain (sector): Catering product for retailers

Brief description: This plan applies on catering products that are packed in thermoforming plastic trays. Product can be for example fresh pasta, nems, falafel, sushi, ready to eat fruits and vegetables, etc.

01.2. Ex-ante analysis and diagnosis of the target supply chain(s) current state, in order to identify what are needs and main challenges in the framework of inorganic waste minimization that justify the transferability action

The Catering sector is composed of many enterprises facing multiple challenges in terms of inorganic waste minimization. In an article published on January, 1st 2020, in the French food-professional magazine LSA, and called “*Reduction of plastic and adoption of the Nutri-score: the catering department becomes responsible for remaining attractive*”, several journalists highlight these challenges and needs. In the target sector, most of these challenges are linked to packaging, and to the common will to banish non-recyclable plastic-based packaging. Indeed, it is not simple to entirely banish plastic from the sector, as it is reliable in terms of quality, security and price – furthermore, the machines used by the companies are calibrated to use plastic, and this is thus the most commonly used packaging material in the catering sector.

However, the national context forces the sector to adapt: indeed, since January 21th, the French deputies have been debating the bill against waste and the circular economy. As it stands, the text imposes the end of single-use plastic packaging by 2040. It has thus become necessary for this plastic-reliant sector to change its ways. Furthermore, the catering sector is confronted with a need to evolve to answer its consumer’s changing needs: the French consumers are demanding more sustainable packaging in the products they buy, and the sustainability of the packaging has become in the recent years an important purchasing argument. A study quoted by All4pack stipulates that one French consumer in five says he is very much in favour of using

refillable packaging and eight out of ten consumers are in favour or very much in favour of buying sustainable packaging¹.

The enterprises of the sector have already begun working on sustainable packaging and on the reduction of inorganic waste, but they are confronted to various challenges: Fleury Michon, a French company producing catering products, has replaced its plastic trays with French poplar trays (wood), and the plastic films covering the whole have been replaced with Flowpack films. However, the Flowpack trays is five times more expensive than a polymer-based film, and the wood used to create plastic trays is not recyclable. Another French Catering company, Daunat, is reducing its unnecessary packaging, including plastic, cardboard and film overpacks, lightening the packs, favouring recyclable raw materials... but is dependent on the technological developments of suppliers and delayed in its efforts by a complex ecosystem which involves local authorities for collection and recycling.

A study² conducted by FICT (French Industrial Federation for Delicatessen and meat-based catering products) and ECOEMBALLAGES describes the challenges and opportunities faced by FICT's Catering companies in terms of inorganic waste minimization. It highlights the many efforts and initiatives launched by the sector to improve its waste minimization, and reminds that the main inorganic wastes created by the interrogated companies are created mainly by plastic trays and films, plastic jars and cans. It underlines that the types of packaging in the meat-catering sector are distributed as such: 29% plastic films, 20% plastic trays, 8% plastic operculum and 34% of other packaging types. Plastic, in the sector, represent 2/3 of the material used. The study, addressed to the companies, remind them of the stakes of sustainable packaging: answering the consumer's demands, increasing the companies' revenues, and participating to a common effort towards inorganic waste minimization.

Thus, many efforts are made in the French catering sector to minimize inorganic wastes, especially in packaging. This sector, which is facing a growing consumer's demand of eco-friendly products, and both economic and political pressure from the upcoming sustainability bills, understands its need to evolve. However, the transition has proven to be complicated, as the sector heavily relies on plastic, plastic which many of its smaller companies have difficulties to replace: the price of alternative materials is far higher than plastic, the technologies not adapted, or the ecosystem itself forbids the recycling of some innovative materials. The catering sector is mature in its will to evolve, and already has interesting success stories. However, its SMEs still need accompanying and could use the transfer of REINWASTE information and material.

¹ <https://www.all4pack.fr/Temps-forts/resumes-conferences/eco-conception-recyclage/Quels-challenges-doit-on-relever-pour-le-sustainable-packaging>

² http://www.ecoemballages.fr/sites/default/files/files/resources/guide_eco-conception_fict_ecoemballages_web.pdf

02. Pre-intervention phase

02.1. Describe the general and specific objectives (linked to the ex-ante analysis) that the transferability measures aims to achieve

The objectives is to enable a massive replication of the solution identified during pilot studies which aims is to replace complex plastic material by mono and/or recycled materials. This solution will allowed more packaging to be recycled and so, will reduce the amount of plastic waste that is not recycled from post-consumption. This will also reduce the use of fossil resource as the recycled material will be used to produce new products. This will lead to create more circular economy in the food industry.

02.2. Explain to which extent the results of the pilot actions implemented into the WP3 pilot could be transferred to the target supply chain

The transferability of the solution identified depends on the materials properties required for the food product. For example, if the technical properties are similar or close to the technical properties of meat product, the recommendation can be strictly the same. On contrary, if the technical properties are specific to the catering product, a specific analyzed need to be conducted in order to identify the mono or recyclable materials that suits the product requirement.

03. Intervention deployment (options: in presence, virtual, only on paper)

List of transferability initiatives		Description of the objective of the transferability	Main beneficiary	Timing (deployment period)
N°	Type of intervention (workshop, webinar, study visit etc...)			
1	Workshop	Disseminate the results of the meat sector at the national level.	French meat and other food industries, French policymakers, solutions providers.	27 th January 2020
2	Webinar	Disseminate the results of the meat sector at the national level and to the catering sector.	French meat and catering companies.	January 2021

3	Meeting	Disseminate the results of the meat sector at local level, in PACA region.	Local companies.	After project ending
4	Conference during a food / packaging fair trade (SIA, SIAL, ANUGA, ALL4PACK...)	Presenting the results of the French pilot to agri-food solutions-providers and meat & Catering companies.	French / European agri-food meat & Catering companies and suppliers.	After project ending
5	Meeting	Disseminate the results of the Reinwaste project and especially the meat sector results at the national level.	French food companies and solution providers	After project ending

04. Post-intervention phase

04.1. How do you globally evaluate the effectiveness of the transferability plan deployment?

- ☐ Poor (low efficacy of the transfer plan / poor interest by the external stakeholders)
- ☒ Good (the transfer plan meets the expectations of the external stakeholders)
- ☐ Excellent (the transfer plan likely mobilize the external stakeholders to consider the REINWASTE approaches / solutions as strategy to reduce inorganic waste)

04.2. How many external economic stakeholders did you globally concern into the transferability phase?

119 food and packaging industries of which 7 from meat sectors and 112 from other sectors; 4 policymakers, 12 solutions providers and 4 universities / Reinwaste partners were concerned by the transferability phase, for a total result of more than 250 stakeholders

04.3. What are the main barriers that the target stakeholders / supply chain should face when approaching the solutions proposed by REINWASTE

The solutions proposed by the REINWASTE French Industrial team are related to the meat sector and adaptable to the Catering sector. However, some of the solutions proposed by the French partners are quite specific to the meat sector; the packaging of ham for example.

The solutions proposed by the French team involve changes in the place of production and an in-depth study of the existing situation. These solutions are not free of charge, and some of them will have an impact on the machines used in production and packaging.

Solutions involving a change of material can also be costly and, above all, the current regional collection method may not allow for their recycling. The solutions proposed by the consortium imply a good knowledge of the regional recycling ecosystem and of the laws in force: the regulatory constraints linked to each material used can be considered as barriers by the stakeholders.

Finally, it should also be noted that any change desired by the Catering actors concerned will not take place without a period of adaptation, and without both human and financial efforts on the part of the company. The process of transformation through the adoption of new solutions can be time-consuming, even if it is essential. This constraint of time and means can be seen as a barrier.

The consumer's reception may also be a barrier, if it is considered that the consumer bases his purchasing decisions on existing packaging. Brands in the catering sector are often recognizable by their colorful and visible packaging. Modifying them could be akin to changing the image of a brand. Not all players are ready to take the plunge.

04.4. Will the target stakeholders / supply chain likely implement the REINWASTE approach / solutions afterwards?

The REINWASTE project and its solutions were transferred to French new communities of practices during many impactful events, both at regional and national levels. Regarding the Catering sector and its stakeholders, the partners will continue to present the solutions tested during the pilot phase. According to the French experts, the members of the Catering sector are the most likely to be able to use the solutions developed by the French REINWASTE consortium, due to the many similarities existing between the two sectors (meat & catering).

The solutions will be examined by the actors of the catering sector, and there will probably be successful attempts to adapt them.

The most important effect will probably be linked to the approach of the REINWASTE project: the actors of the catering sector have discovered a solid and recognized methodological approach, and now have all the information on the processing steps necessary for an evolution of their inorganic waste production.