



Driving Sustainable Metal Packaging

January - December 2025

EPR SCHEME:
Year 4 Annual Report

22 May 2026

From the desk of the CEO



Dr. Kishan Singh
MetPac-SA CEO

MetPac-SA's 2025 performance marks a significant milestone in advancing sustainable metal packaging and strengthening South Africa's circular economy. Over the past year, the organisation achieved its strongest operational results since the implementation of the EPR scheme in 2022, exceeding key regulatory collection and recycling targets across aluminium beverage cans and tinplate packaging streams. These achievements were supported by strengthened industry collaboration, expanded national partnerships, improved post-consumer data systems, and the successful attainment of ISO 9001:2015 certification, reinforcing MetPac-SA's commitment to governance, transparency, and operational excellence. Strategic investments in infrastructure development, including the BBC200 national buy-back centre digitisation programme and the Tonkmeter Materials Recovery Facility, have enhanced recycling capacity and improved waste picker integration across the value chain. In parallel, MetPac-SA continued to invest in education, awareness, and behavioural change initiatives that reached schools, universities, communities, and industry stakeholders nationwide. The organisation also initiated a group-level Life Cycle Assessment for aluminium beverage cans and laid the groundwork for a tinplate food can LCA, positioning the industry to better understand and improve the environmental performance of metal packaging. While challenges remain within the Aluminium Other stream, particularly around the collection of low-value and difficult-to-recover packaging formats, the progress achieved during Year 4 demonstrates the growing maturity, resilience, and impact of the EPR scheme. MetPac-SA remains committed to driving innovation, supporting inclusive economic participation, and accelerating the transition towards a more circular, resource-efficient, and sustainable packaging system for South Africa.

Executive Summary

MetPac-SA's Year 4 (2025) Annual EPR Performance Report demonstrates the organisation's most significant operational results since the EPR scheme commenced in 2022. Across all three primary material streams – aluminium used beverage cans (UBCs), tinplate (ferrous) packaging, and Aluminium-Other – performance has improved, with UBCs and tinplate both exceeding all their regulatory collection and recycling targets.

The organisation achieved ISO 9001:2015 quality management certification, led the BBC200 national buy-back centre digitisation programme, initiated a group-level Life Cycle Assessment for aluminium beverage cans, and expanded its national project footprint to cover all nine provinces.

A total of 53 employment opportunities were created or supported during the reporting period.

Year 4 represents a turning point: collection and recycling across metal packaging streams have exceeded targets, data systems have been strengthened, and governance has matured through ISO 9001:2015 certification. The key remaining challenge is Aluminium Other which is a focus area for 2026.



Table of Contents

1	About MetPac-SA	5
1.1	ISO 9001:2015 certification – a milestone for Year 4	7
1.2	Membership and EPR fee structure	7
2	EPR performance against regulatory targets	8
2.1	Aluminium Used Beverage Cans (UBC)	10
2.2	Tinplate (ferrous) packaging	13
2.3	Aluminium Other	14
3	Aerosol packaging – Year 4 research and strategy	16
4	Strategic projects and partnerships	16
4.1	BBC200 – National buy-back centre digitisation programme	16
4.2	Tonkometer Materials Recovery Facility	17
4.3	NWU Deposit Return Scheme (DRS) pilot	17
4.4	Life Cycle Assessment	18
5	Waste picker integration and social impact	19
6	Public communication and awareness	19
6.1	Social media and digital engagement	19
6.2	Trash 4 Treats school recycling programme	19
6.3	Plant the Seed – educational video series and Zero Waste Toolkit	20
6.4	UN SDG Challenge and university engagement	21
6.5	Durban Chamber of Commerce and Industry	21
7	Governance, compliance, and transformation	22
7.1	B-BBEE status	22
8	Member satisfaction survey findings	22
9	Priorities and outlook for Year 5 (2026)	23
	Annexure A: MetPac-SA Members – Year 4	24

Figures

Figure 1: MetPac-SA Board and Organisation Organogram	6
Figure 2: Geo-spatial representation displays the locations of MetPac-SA's post-consumer data sources across South Africa.	9
Figure 3: UBC Collection %	10
Figure 4: UBC Recycling %	10
Figure 5: UBC Product Design (% Recycled Content)	11
Figure 6: UBC Energy Recovery / Exports / Other %	11
Figure 7: Material Flow Analysis for UBC (Tonnes) Year 4 - 2025	12
Figure 8: Tinplate (Ferrous) Collection %	13
Figure 9: Tinplate (Ferrous) Recycling %	14
Figure 10: Aluminium Other Collection %	14
Figure 11: Aluminium Other Energy Recovery / Exports / Other %	14
Figure 12: Aluminium Other Product Design (Recycled Content %)	15
Figure 13: Aluminium Other Recycling %	15

Tables

Table 1: Aluminium UBC Performance Against EPR Targets for Year 4	8
Table 2: Aluminium Other Performance Against EPR Targets for Year 4	8
Table 3: Tinplate (ferrous) Performance Against EPR Targets for Year 4	8



1. About MetPac-SA

MetPac-SA (Metal Packaging Association of South Africa) is a Non-Profit Company (NPC) registered under the Companies Act No. 71 of 2008 (Registration Number 2017/216419/08). It operates as a Producer Responsibility Organisation (PRO) for the tinsplate (steel/ferrous), and aluminium packaging sectors, fulfilling obligations under the EPR Regulations published in Government Gazette No. 44539 (5 May 2021) in terms of Section 18 of the National Environmental Management Waste Act, 59 of 2008 (NEMWA).

Board of Directors Year 4 - 2025			
Chair Mark Helfrich (Nestle)	Mohammed Darsot (Dürsots)	Bridget Rubumbura-Zuma (Hulamin)	Ntsako Baloyi (Coca-Cola Bottling South Africa)
David Kramer (AB-InBev)	Molatelo Motau (Heineken)	Karen-Dawn Koen (Oceana Group)	Andre Hoffman (RFG Foods)



Kishan Singh CEO			
Rishant Harichunder Operations Manager	Ravi Nadar Research Analyst	Belinda Booker Recycling and Enterprise Development	Annamarie Botha Financial Services/SARS
Monique Hinds Media & Communications	Lara-Jane Venter Administration	Keaoleboha Sefako Marketing & Communications	Khosi Mbatha Project Consultant

Circular Vision - Independent EPR consultants
 Sally-Anne Kasner & Bonte Edwards



Members

The organogram reflects MetPac-SA’s functions under the leadership of Dr Kishan Singh (Chief Executive Officer) and MetPac-SA’s Board of Directors, representing the members from industry.

Figure 1: MetPac-SA Board and organisation organogram as per the CIPC registration (2023)

**1.1 ISO 9001:
2015 certification
– a milestone for Year**

In June 2025, MetPac-SA achieved ISO 9001:2015 Quality Management System certification through DNV, an independent European certification body. This represents a significant step forward in governance integrity, transparency, and regulatory accountability across the organisation.

**1.2 Membership
and EPR fee structure**

MetPac-SA membership is open to all producers, importers, brand owners, and converters placing more than 10 tonnes of metal packaging annually on the South African market, as well as voluntary members below that threshold. The Year 4 (2025) EPR fee structure was implemented based on the 2024 (Year 3) fees confirmed by ministerial concurrence in 18 February 2025. EPR fees were as follows:

Converters / contract packers

R20 per tonne for steel or tinplate (ferrous)	R15 per ton for aluminium	R5 000 membership fee per annum shall apply ¹
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Brand owners (local sourcing)

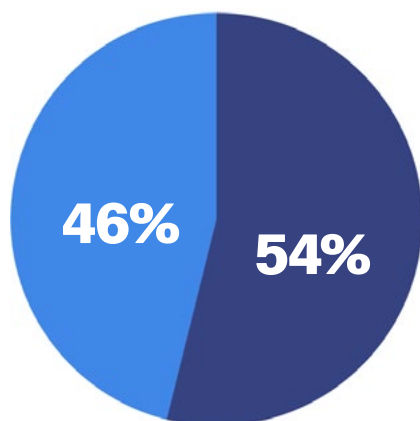
R168 per ton for steel or tinplate (ferrous)	R131 per ton for aluminium
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Brand owners (importing filled packaging)

R188 per ton for steel or tinplate (ferrous)	R146 per ton for aluminium	R5 000 membership fee per annum shall apply ¹
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Members are required to submit quarterly declarations to MetPac-SA, including their monthly tonnage data, to support accurate data collection and reporting, as well as to enable member invoicing and reporting to the DFFE.

All financial statements for Year 4 have been audited by independent auditors MFG Accountants, prepared in accordance with IFRS for SMEs, and approved by the Board on 27 March 2026.



**MetPac-SA membership tonnage
placed on market declarations for
the Annual Report (2025):**

- Tinplate (Ferrous) Packaging
- Aluminium Packaging

(1) This fee relates to those that perhaps do not trigger the 10 tonne threshold but would like to participate in the EPR and contribute to the implementation of projects.

2. EPR performance against regulatory targets

The following table summarises MetPac-SA's Year 4 (2025) performance against the EPR targets set in the Regulations. The year Targets are compared to the year Actual performances to assess whether we are below or above our targets.

Aluminium - UBC		2025		
Targets	Target	Actual	Status	
Product Design (recycled content)	36%	56%	Exceeded	
Collection Target	68%	81%	Exceeded	
Recycling Target	34%	81%	Exceeded	
Energy recovery / exports / other	34%	51%	Exceeded	

Table 1: Aluminium UBC Performance Against EPR Targets for Year 4 – Jan-Dec 2025.

Aluminium - Other		2025		
Targets	Target	Actual	Status	
Product Design (recycled content)	3%	18%	Exceeded	
Collection Target	28%	20%	Below Target	
Recycling Target	13%	20%	Exceeded	
Energy recovery / exports / other	15%	9%	Below Target	

Table 2: Aluminium Other Performance Against EPR Targets for Year 4 – Jan-Dec 2025.

Tinplate (Ferrous)		2025		
Targets	Target	Actual	Status	
Product Design (recycled content)	56%	64%	Exceeded	
Collection Target	59%	64%	Exceeded	

Table 3: Tinplate (ferrous) Performance Against EPR Targets for Year 4 – Jan-Dec 2025.

MetPac-SA's internal team has created a comprehensive cloud-based database: the Dashboard system, which consolidates member declarations with post-consumer data to support year-on-year analysis of collection and recovery trends aligned with DFFE EPR KPIs. The Dashboard strengthens data-driven decision-making and supports strategic planning to advance circular economy initiatives.



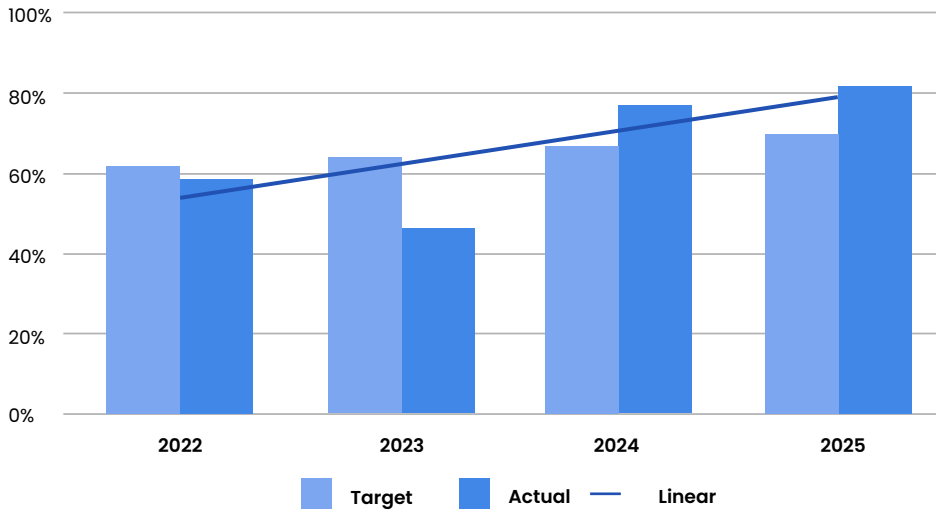
Figure 2. Geo-spatial representation displays the locations of MetPac-SA's post-consumer data sources across South Africa.

Figure 2 presents a map that illustrates the geographic distribution of MetPac-SA's post-consumer data sources across South Africa, demonstrating both the national reach of the reporting system and the composition of material streams captured. The 40 post-consumer data sources provide a national data network and underpins the improved accuracy of Dashboard figures.

2.1 Aluminium Used Beverage Cans (UBC)

UBC performance in 2025 represents the strongest year on record across all four KPIs:

Used Beverage Cans Collection %



Collection: 81% actual vs 68% target – the third consecutive year of exceeding targets, following a sharp dip in 2023 (49%). The UBC stream is approaching a natural plateau as most recoverable cans are already being collected.

Figure 3: UBC Collection %

Recycling: 81% actual vs 34% target – a dramatic improvement from 11% in 2022, reflecting significant infrastructure investment and improved strategic partnerships across the value chain.

Used Beverage Cans Recycling %

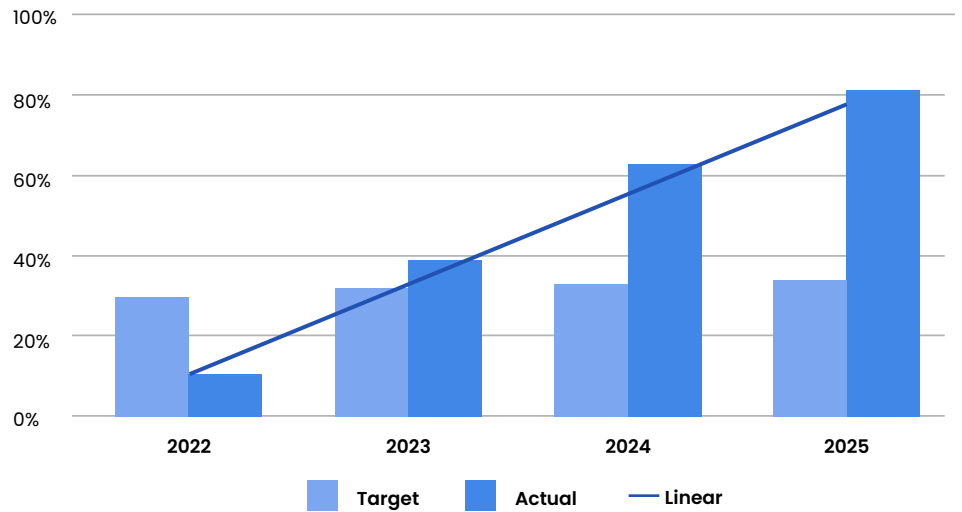


Figure 4: UBC Recycling %



Recycled content in can design: 56% actual vs 36% target – consistently outperforming targets since inception, demonstrating strong industry commitment to circular material use.

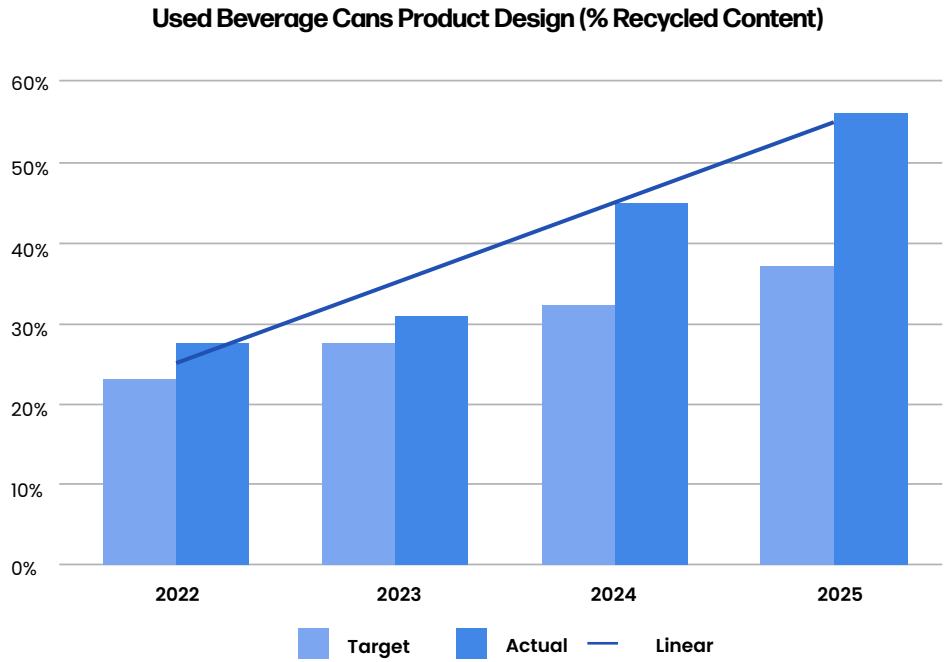


Figure 5: UBC Product Design (% Recycled Content)

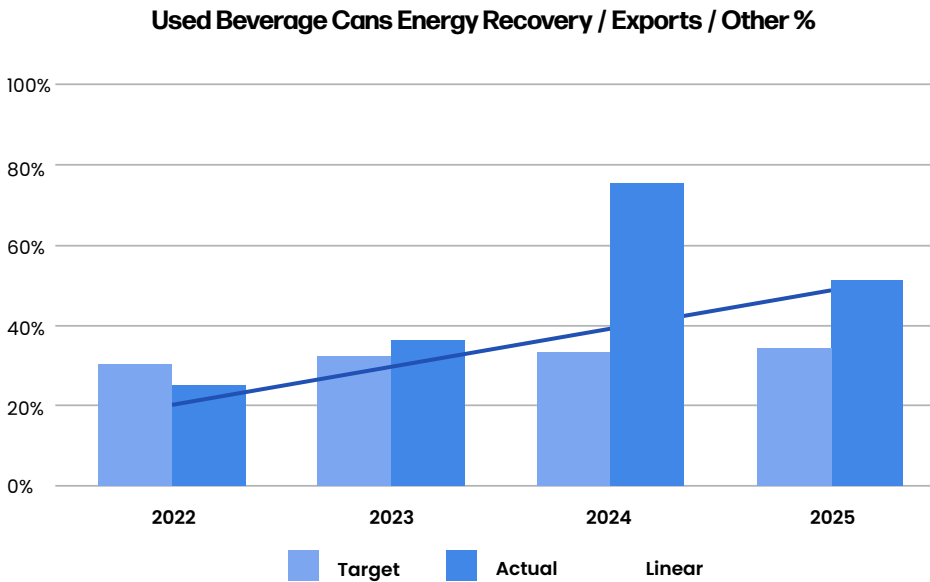
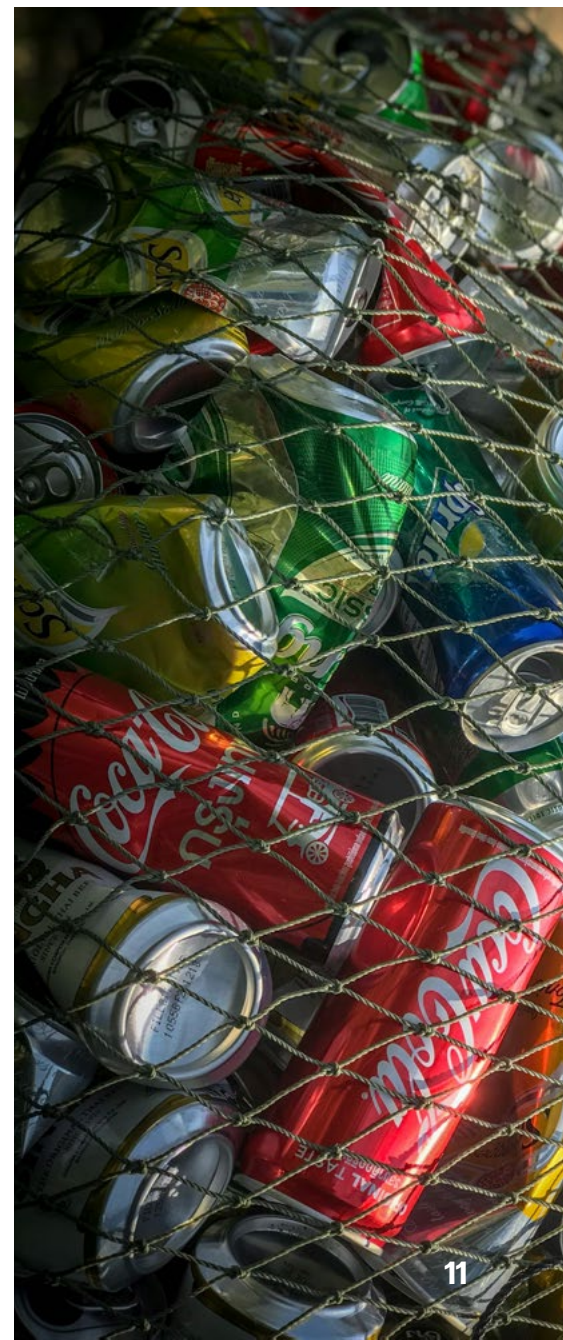


Figure 6: UBC Energy Recovery / Exports / Other %

Energy recovery / exports / other: An increasing proportion of UBC material is being diverted through alternative recovery streams. MetPac-SA proposes that no specific target be set for this metric, as it functions as a balancing indicator within the material flow analysis.



MetPac develops an annual UBC material flow analysis which shows how aluminium cans move from raw material inputs through manufacturing and market placement, with a portion collected post use for recycling domestically or abroad.

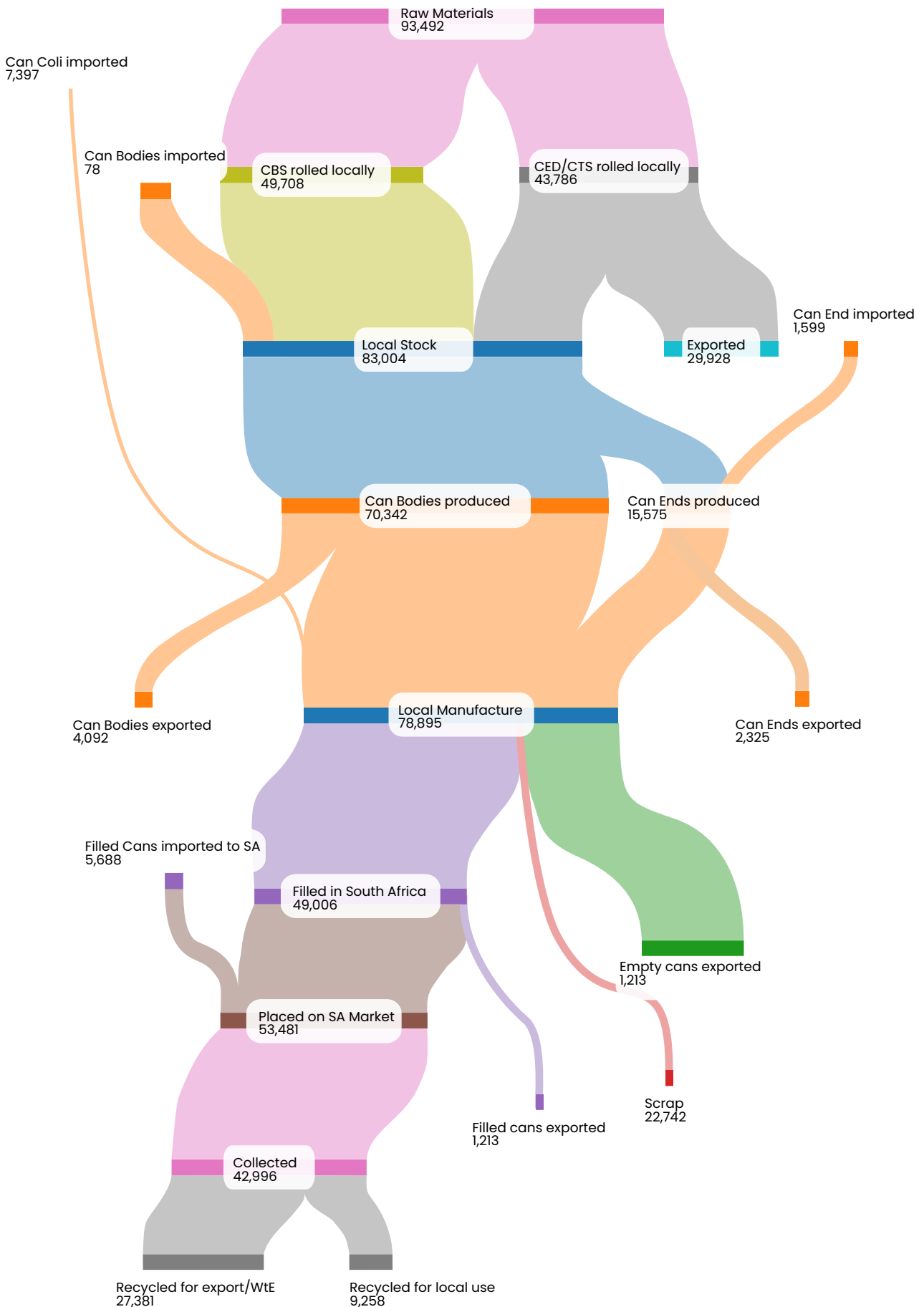
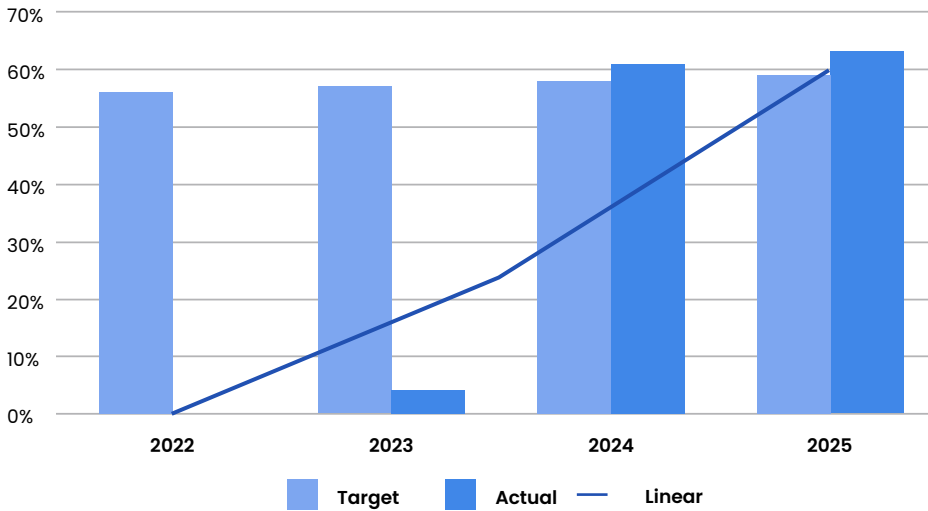


Figure 7: Material Flow Analysis for UBC (Tonnes) Year 4 - 2025

2.2 Tinplate (ferrous) packaging

Tinplate performance was extremely low in 2022 (approximately 0.3% for both collection and recycling), followed by transformative improvement:

Tinplate (Ferrous) Collection %



Collection: 64% actual vs 59% target – exceeded for the second consecutive year, following the breakthrough in 2024 (61% vs 58% target).

Figure 8: Tinplate (Ferrous) Collection %

Recycling: 64% actual vs 56% target – likewise exceeding target for the second consecutive year.

Tinplate (Ferrous) Recycling %

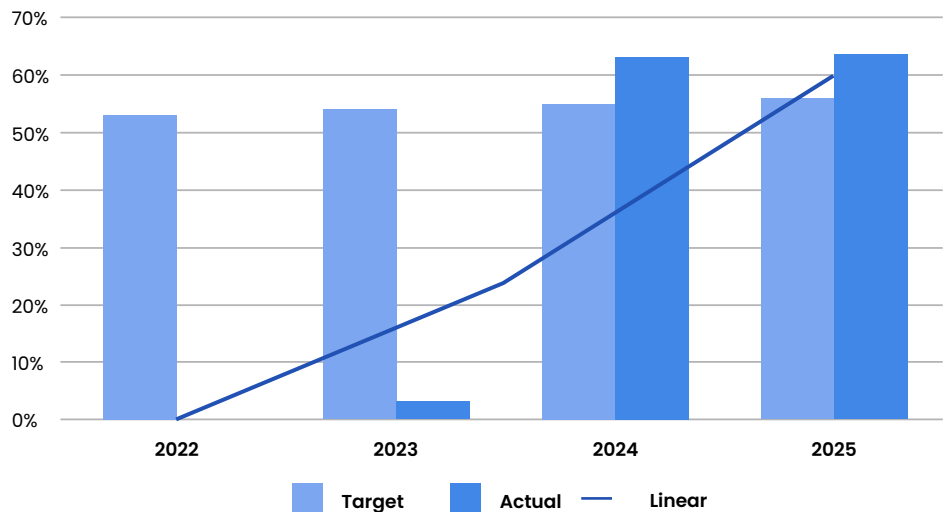


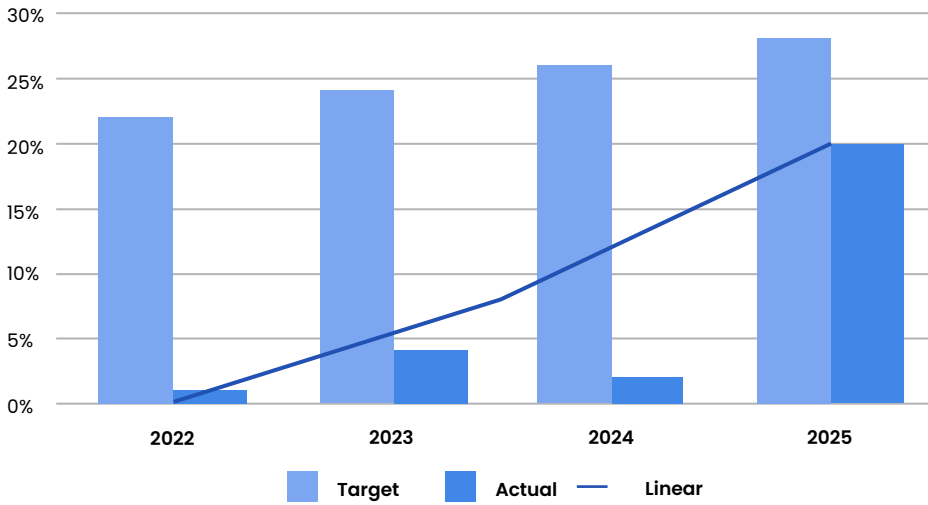
Figure 9: Tinplate (Ferrous) Recycling %

Accurate post-consumer collection data for tinplate (ferrous) packaging is difficult to obtain, as it is typically aggregated within total scrap steel figures across buy-back centres. Therefore a key methodological innovation underpinning tinplate data is the waste characterisation exercise conducted at steel waste collection partners. By physically sorting and weighing steel purchased at buy-back centres, MetPac-SA established that tinplate packaging represents 1.39% of total steel tonnage across the audited sites. This ratio is then applied to national steel tonnage data from strategic partner, XA Trading, enabling a robust estimation of tinplate packaging flows.

2.3 Aluminium Other

Aluminium Other includes aerosols, foil trays, household foil, caps, coffee pods, and related formats and remains a challenging material stream. Although post-consumer collection and recycling rates are improving, significant challenges remain.

Aluminium Other Collection %



The 20% collection rate in 2025, while an improvement from 2% in 2024, still falls short of the 28% target. However, this figure requires important contextual interpretation:

Figure 10: Aluminium Other Collection %

- The majority of the 2025 improvement is attributable to the inclusion of aerosol data for the first time, following the formal transition of aerosols into the MetPac-SA PRO in 2024.
- Aluminium Other represents only approximately 3.9% of MetPac-SA member declarations and 0.10% of total packaging placed on market – providing context for its relatively limited EPR impact overall.
- Items such as aluminium foil, trays, caps, and coffee pods have low intrinsic value due to thin gauges, contamination, and re-melt losses, creating economic barriers to collection that are difficult to overcome through EPR investment alone.

Aluminium Other Energy Recovery/ Exports / Other %

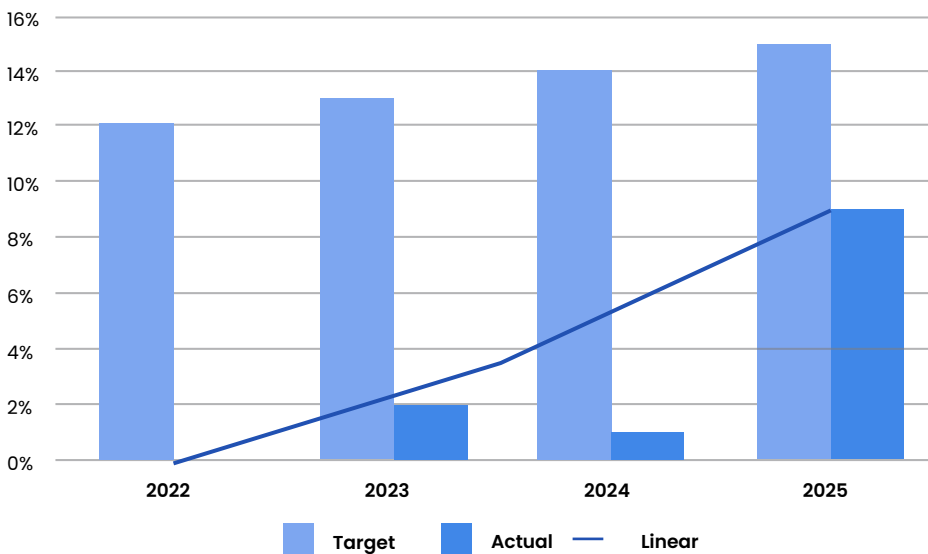


Figure 11: Aluminium Other Energy Recovery / Exports / Other %

Recycled content in Aluminium Other design reached 18% against a 3% target is primarily driven by aerosol data.

Aluminium Other Product Design (% Recycled Content)

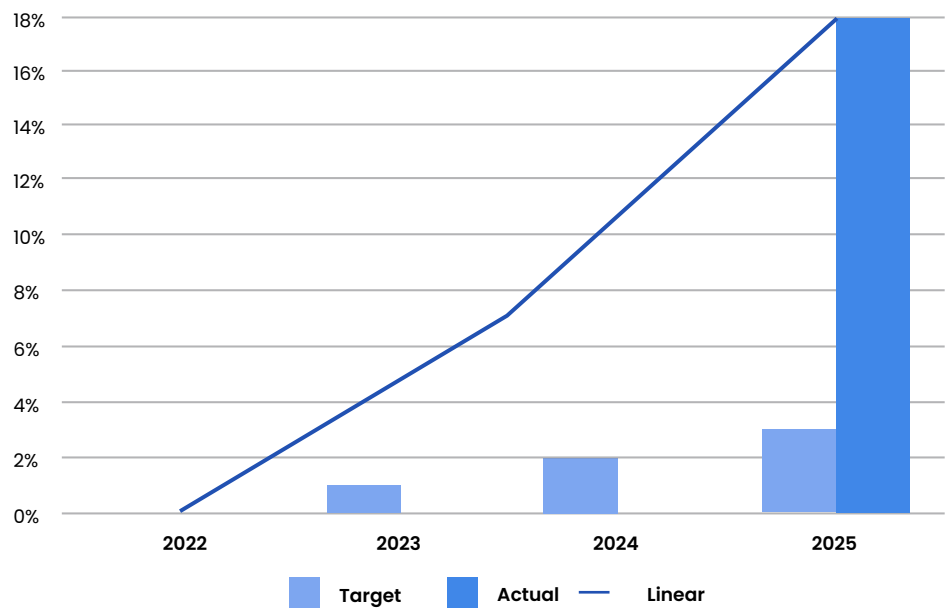
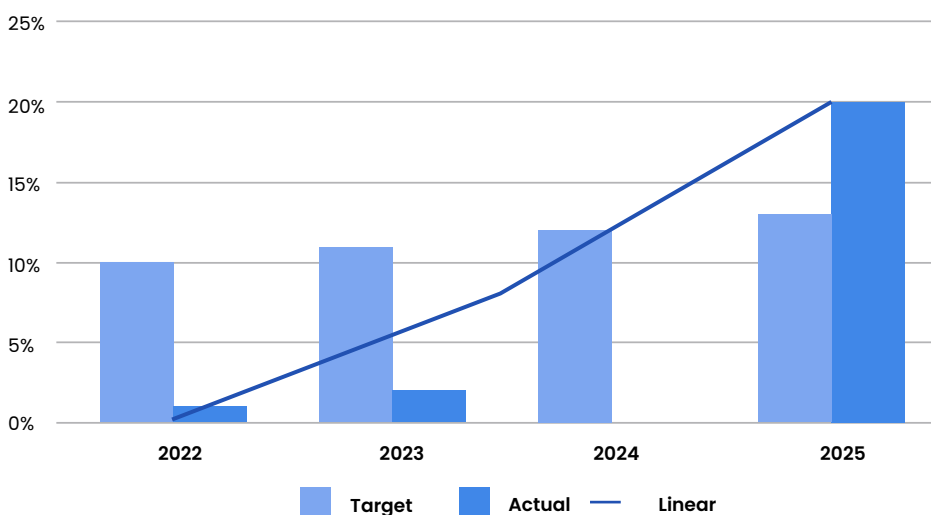


Figure 12: Aluminium Other Product Design (Recycled Content %)

Aluminium Other Recycling %



Recycling performance for Aluminium Other exceeded its 13% target at 20%.

Figure 13: Aluminium Other Recycling %

MetPac-SA has committed to a dedicated improvement strategy for Aluminium Other, drawing on international best practices, and plans consumer education campaigns for 2026.

3. Aerosol packaging – Year 4 research and strategy

In 2025, MetPac-SA undertook its first comprehensive assessment of aluminium and tinplate aerosol packaging in South Africa, following the formal incorporation of aerosols into the MetPac-SA PRO from 2024.

Key findings:

3 000t

Aluminium aerosols placed on market

5 150t

Tinplate aerosols placed on market

8%

Of total (106 494t) of MetPac's member packaging placed on market

The study confirms that aerosol cans are fully recyclable when empty, but public awareness remains low and inconsistent and is guiding the following strategy in 2026:

- Launch a national consumer education campaign on proper aerosol recycling.
- Develop and implement enhanced safety protocols and training for buy-back centres and waste-pickers
- Establish a dedicated Working Group within MetPac-SA

4. Strategic projects and partnerships

MetPac-SA invested a total of R9.272 million across its 2025 project portfolio, spanning all nine provinces. The portfolio is organised around three primary objectives: infrastructure development, waste picker integration, and education and behaviour change. Projects were implemented in collaboration with municipalities, industry bodies, PRO Alliance partners, and private sector players.

4.1 BBC200 – National buy-back centre digitisation programme

The Buy Back Centre 200 (BBC200) Project is a national programme led by the PRO Alliance, targeting the digitisation and standardisation of 200 qualifying buy-back centres across South Africa by 31 December 2026. The programme enables compliant, auditable Waste Picker Service Fee (WPSF) payments and live EPR data reporting through integration with the AMPLO Pay cashless payment platform and the South African Waste Picker Registration System (SAWPRS).

Kishan Singh (MetPac-SA CEO) plays an important oversight role on the project leadership team.

Phase 1 (May–December 2025) achieved:

- 51 buy-back centres upgraded and onboarded (45 BBC200 baseline sites + 6 PETCO-aligned sites)
- 12 750 waste pickers registered; 10 113 actively receiving WPSF payments
- API integration with SAWPRS completed
- Delivered within the approved R2.5 million Phase 1 budget

Phase 2 (2026) will adopt a stage-gated rollout targeting approximately 16 sites per month, with a four-month stabilisation period per site and a total budget of R10.6 million funded by the PRO Alliance. Full programme targets by end-2026: 200 BBCs live and reporting; 100 000 waste pickers digitally registered and card-enabled.

4.2 Tonkmeter Materials Recovery Facility

The Tonkmeter MRF, located at the Tonkmeter Resource Facility in Springs, Gauteng is a strategic EPR infrastructure initiative supported by MetPac-SA and Petco. The site, adjacent to a licensed landfill with an estimated 35-year lifespan aims to strengthen regional recycling capacity. Operational since February 2025 (pilot study commenced September 2025), the facility processes plastics, glass, paper, and metals from landfill salvage, nearby industries, and waste pickers.

Key parameters:

<p>Projected monthly diversion: 100–600 tonnes of recyclables depending on scale</p>	<p>Capital investment: R2.2 million to R4.5 million</p>
<p>Expected job creation: minimum 15 jobs</p>	<p>Full operational capacity: December 2026, including waste picker payment systems and EPR-compliant reporting</p>

4.3 NWU Deposit Return Scheme (DRS) pilot

In 2025, planning of a 24-month Deposit Return Scheme pilot commenced at North-West University (NWU), supported by DFFE, TOMRA, and Imagined Earth. Phase 1 launched in March 2026 at the Potchefstroom Campus using 10 Reverse Vending Machines (RVMs), scaling to 30 machines across three NWU campuses. The pilot targets collection rates of 90%+ across PET, glass, aluminium, HDPE, and liquid board packaging.

The pilot aims to validate DRS effectiveness in a real-world setting, targeting collection rates of approximately 90%. The pilot will generate the critical evidence base needed to inform national DRS policy.



4.4 Life Cycle Assessment

MetPac-SA initiated a group-level Life Cycle Assessment (LCA) for aluminium beverage cans in 2025, on behalf of its aluminium beverage can producers and brand owners. The group approach eliminates the need for individual producer LCAs, reducing cost and administrative burden while improving data quality and industry alignment. The functional unit of comparison is the equivalent of 1 000 units of 330 ml cans. The LCA will be concluded by December 2026. An LCA for tinplate food cans will be initiated in 2026.

5. Waste picker integration and social impact

Waste picker integration is a core EPR obligation under Condition 5A(1)(m) and a central component of MetPac-SA's operational strategy. MetPac-SA's initiatives during Year 4 focused on formalisation, digitisation, income support, and improved working conditions.

MetPac-SA's broader waste picker support activities in 2025 included:

- Provision of personal protective equipment (PPE) to waste pickers at project sites
- Transportation support for waste picker collection operations
- Training and enterprise development initiatives
- Service fee payment mechanisms via the AMPLO Pay platform
- Partnerships with the African Reclaimers Organisation (ARO) and South African Waste Pickers Association (SAWPA)

The 2025 job creation list reflects 53 employment opportunities created and supported.



6. Public communication and awareness

Year 4 saw a step-change in MetPac-SA's public communication reach, driven by a new marketing strategy implemented in February 2025. The following initiatives collectively demonstrate the breadth and depth of MetPac-SA's education and awareness activities during the reporting period.

6.1 Social media and digital engagement

Social media followers grew from 396 (January 2025) to 2 865 (January 2026) across Facebook, Instagram, and LinkedIn. Facebook views increased from 235 in January 2025 to 327 000 by February 2026; Instagram from 199 to 50 400; LinkedIn impressions from 3 to 121 000. The MetPac-SA website attracted more than 2 000 unique visitors, generating over 9 300 page views and an average session duration of over two minutes.

3.2m

Total social media views & impressions (2025)

723%

Growth in social media followers (Jan 2025–Jan 2026)

81 000+

Google search appearances

6.2 Trash 4 Treats school recycling programme

Implemented across 55 schools in Gauteng, the Western Cape, and KwaZulu-Natal, Trash 4 Treats directly engaged 50 107 learners through 2 200 educators, with extended reach to a further 100 214 individuals including family members and community participants. In 2025, the programme collected 73 296 kg of recyclables, of which 6 224 kg was metal packaging

Key findings:

55

Schools

50 107

Learners

2200

Teachers

100 214

Community members engaged



In 2025, the programme:

- Collected 73 296 kg of recyclables, of which 6 224 kg was metal packaging
- Generated R59 299 in recycling income for participating schools
- Collected 109 966 cans nationally through dedicated metal packaging collection days
- Reached over 254 000 individuals cumulatively since inception

Palmview Primary School (KwaZulu-Natal) was the top-performing school in 2025, collecting 2 421 kg with 590 learners involved, earning R15 000 in prize money for school infrastructure upgrades.

6.3 Plant the Seed – educational video series and Zero Waste Toolkit

In partnership with Plant the Seed, MetPac-SA co-produced a free educational video series on recycling and the circular economy, achieving nearly 200 000 total views and engaging over 12 000 individuals per video. The Zero Waste Toolkit was rolled out in six schools, deploying 300 bins, engaging 5 300 individuals, and diverting 8 673 kg of recyclables from landfill between February and December 2025.



6.4 UN SDG Challenge and university engagement

MetPac-SA collaborated with Hulamin and five UKZN students in the 2025 SDG Challenge Grand Finale, addressing UBC cleanliness and collection data quality. The project produced practical recommendations including public awareness campaigns, source separation incentives, quality monitoring protocols, and legislative amendments to include all stakeholders in EPR reporting.



6.5 Durban Chamber of Commerce and Industry

MetPac-SA CEO Dr Kishan Singh chairs the DCCI Compact on Built Environment (Sustainability), providing a platform for cross-sector collaboration on waste picker integration, agricultural sustainability, and coordinated clean-ups. Over the next 12–24 months, formalised collection programmes, increased recycling volumes, and improved data systems are targeted through this partnership.

7. Governance, compliance, and transformation

7.1 B-BBEE status

In November 2025, MetPac-SA received its first B-BBEE certification, achieving Level 8 status with a total score of 44 out of 100 points. The organisation performed strongly in Enterprise and Supplier Development and Management Control. Areas requiring improvement include Skills Development and Socio-Economic Development (both scored zero). MetPac-SA has committed to reaching Level 4 by 2026 through the following actions:

- Registering with SETA and increasing formally recorded skills development expenditure
- Formalising socio-economic contributions through documented support letters
- Updating supplier B-BBEE certificates and tightening record-keeping processes



8. Member satisfaction survey findings

In 2025, MetPac-SA conducted a voluntary member satisfaction survey to evaluate perceived effectiveness across EPR obligations.

Key findings:

- Regulatory compliance and advocacy: Members expressed strong confidence in MetPac-SA's ability to meet DFFE EPR targets for UBC and tinplate streams. Aluminium Other was the exception, but the 2025 improvement is noted positively.
- Waste collection, recycling, and market development: Collaboration with buy-back centres, municipalities, and recyclers was positively viewed, with MetPac-SA recognised as a contributor to strengthening national recycling systems.
- Waste picker integration: Efforts on registration, training, PPE, and service fees were acknowledged, with some residual uncertainty around registration progress.
- Financial transparency: Members expressed high confidence in MetPac-SA's financial governance and reporting practices.
- Education and innovation: Strong appreciation for outreach and innovation initiatives, with opportunity to enhance visibility.

Overall the survey confirms MetPac-SA is perceived as effectively fulfilling its EPR obligations and as a credible, effective leader in advancing sustainable metal packaging practices in South Africa.

9. Priorities and outlook for Year 5 (2026)

Building on the achievements of Year 4, MetPac-SA has identified the following priority actions for EPR Year 5 (2026):

Performance and data

- Address the Aluminium Other collection shortfall through targeted consumer education campaigns
- Strengthen aerosol data collection across producers, importers, and buy-back centres
- Conclude the UBC Life Cycle Assessment (December 2026) and initiate the tinfoil LCA
- Continue to expand the partner data network

Infrastructure and systems

- Complete Phase 2 of BBC200 (targeting 200 BBCs live by December 2026; 100 000 waste pickers card-enabled)

Aerosols and safety

- Launch national aerosol consumer education campaign on safe and proper disposal
- Develop safety protocols for handling aerosol cans
- Establish an Aerosols Working Group to coordinate value chain stakeholders

Governance and transformation

- Achieve B-BBEE Level 4 certification through structured skills development and socio-economic development interventions
- Maintain ISO 9001:2015 certification and continue quality management system maturation
- Engage DFFE on revising Aluminium Other targets to reflect updated data coverage and the structural challenges of small-format packaging



This summary document has been prepared from MetPac-SA's 2025 Annual EPR Performance Report approved by the Board on 27 March 2026. Full audited financial statements, agreed-upon procedures report, member register, project list, and compliance checklist are available in the full report. All data reflects the period 1 January – 31 December 2025.

Annexure A: MetPac-SA Members – Year 4



HALEWOOD
Wines & Spirits

HEINEKEN



LIBSTAR



Massilly



Montagu
TRUSTED QUALITY SNACKS



Nestlé



RECKITT
BENCKISER



REVLON





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