

EVENT REPORT

Unpacking Beverage Cartons

Separating Myth from On-Ground Reality (Thursday, 13 August 2026)

At a Glance

AARC convened a public webinar on 13 August 2026, bringing regulators, brand owners, packaging manufacturers, recyclers, collectors, researchers and civil society onto a single platform. The session was built on a simple premise: that the beverage carton category suffers less from an absence of solutions than from an abundance of assumptions. Rather than defend the category in the abstract, the Alliance placed five of the most persistent misconceptions on the table and tested each against evidence drawn from the field.

Particulars	Details
Title	Unpacking Beverage Cartons: Separating Myth from On-Ground Reality
Date	Thursday, 13 August 2026
Duration	2 hours
Moderator	Mr. Jaideep Gokhale, Chief Executive Officer, AARC
Chief Guest	Shri G. Thirumurthy, Scientist, Central Pollution Control Board
Participation	127 participants at peak
Format	Opening remarks, industry keynote, seven-member expert panel on five myths, regulator's reflections, white paper launch
Key Outcome	Release of the AARC white paper on beverage cartons in India

Why This Conversation, and Why Now

Opening the session, Mr. Jaideep Gokhale, Chief Executive Officer of AARC, introduced the Alliance as a not-for-profit body established eight years ago to serve as the collective voice of the paper-based beverage carton packaging industry. He highlighted that its 16 members represent carton producers and importers, brand owners, and value-chain partners, and emphasised that the webinar marked the beginning of a sustained series of public engagements, welcoming participation from research institutes, NGOs, academia, policymakers and multilateral agencies. While Dr. Satyen Kumar Panda of FSSAI was unable to join as the keynote speaker; from the industry side, Mr. Narayanan Ranganathan of Dabur India stepped in to deliver the industry keynote, representing the food and beverage sector. Participants were also informed that Shri G. Thirumurthy of CPCB would observe the panel and share his reflections at the close, allowing the regulator to first hear candid perspectives from across the ecosystem.

Opening Remarks

Mr. Cassio Simoes — Chairman, AARC; Managing Director, Tetra Pak South Asia Markets

Mr. Simoes positioned the discussion around building trust and addressing misconceptions that can directly influence collection and recycling behaviour. Drawing on experience across Latin America and South Asia, he emphasised that a circular economy can only be achieved through coordinated action across the entire value chain, with EPR serving as a driver of investment rather than merely a compliance mechanism. Citing the latest TERI study across 24 Indian cities, he noted that beverage carton recycling has increased from 29% in 2011 to nearly 64% in 2025 in city surveyed, indicating significant progress driven by sustained investment and collaboration. He stressed that the Alliance's credibility lies not in claiming perfection, but in acknowledging challenges, continuing the work and maintaining an open dialogue with stakeholders.

Industry Keynote

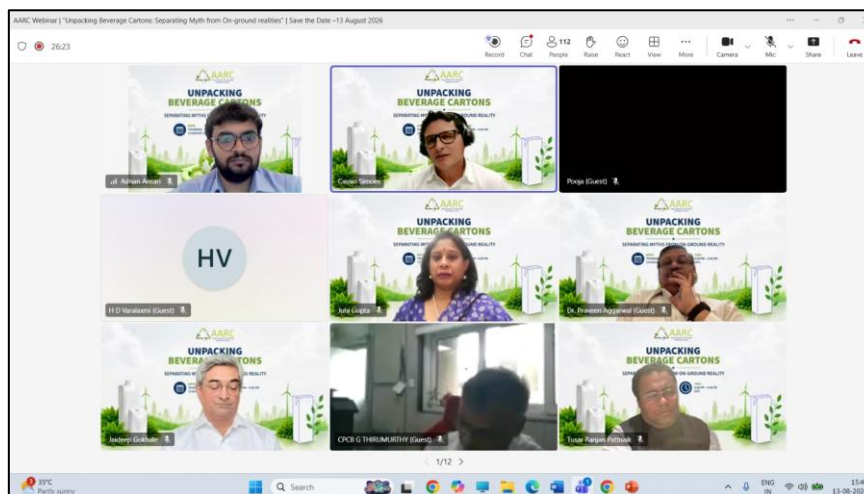
Mr. Narayanan Ranganathan — Vice President & Head of Procurement, Dabur India Limited

Mr. Ranganathan highlighted the environmental value of beverage cartons, noting that their lightweight, multilayer design enables juices to remain safe and fresh for months without refrigeration, thereby reducing emissions associated with cold-chain storage and food spoilage. He shared Dabur's commitment to achieving net zero by 2045 and outlined several sustainability initiatives, including the use of FSC-certified paperboard, recycled carton pallets in its facilities, and the transition to bio-based caps, with around 10% of its beverage portfolio already converted and plans to extend this across the juice range. He emphasised that while meaningful progress has been made, the pace of transition must accelerate, supported by greater policy clarity to enable brands and suppliers to invest and act with confidence.

Panel Discussion: Five Myths, Tested

Mr. Gokhale placed on record that the views expressed were those of the individual speakers and did not necessarily represent the positions of their organisations. Seven panellists joined him from across packaging, brands, paper recycling, full carton recycling, research and collection.

Panellist	Designation & Organisation
Ms. Juhi Gupta	Sustainability Director, Tetra Pak South Asia
Mr. Tusar Ranjan Pattnaik	National Head — Public Affairs, Communications & Sustainability, Hindustan Coca-Cola Beverages
Mr. Rajesh Ponnuru	Divisional Chief Executive, ITC Paperboards & Specialty Papers Division
Mr. Aashish Shah	Chief Operating Officer, Deluxe Recycling
Dr. Suneel Pandey	Senior Fellow & Director, Circular Economy and Waste Management Division, TERI
Mr. Shekhar Bissa	Senior General Manager, Reliance Industries Limited
Mr. Anurag Asati	Co-Founder, The Kabadiwala



The panel in session, with the Secretariat, panellists and CPCB in attendance

MYTH 01

THE CLAIM

Beverage cartons are plastic packaging, and are no different from multi-layered plastic.

ON GROUND

Ms. Juhi Gupta clarified that not every beverage carton is a Tetra Pak — the brand has become synonymous with the category much as Xerox became synonymous with photocopying. A carton is a six-layer structure that is approximately 70 per cent paperboard, 25 per cent polymer and 5 per cent aluminium. It falls under Category III of the Plastic Waste Management Rules because that category covers packaging with at least one plastic layer combined with non-plastic material, whereas Category II covers packaging made only of plastic layers. She flagged a live ambiguity on the ground: recyclers have registered under both Category II and Category III, which clouds visibility on what is actually being collected and recycled. Mr. Anurag Asati added the trade view — in ten years of collection, cartons have always moved through the paper stream, baled alongside corrugated board, and never through the plastic stream.

MYTH 02

THE CLAIM

Cartons cannot be collected at any meaningful scale, and carry no value in the waste trade.

ON GROUND

Mr. Anurag Asati placed the carton squarely in the middle of the value ladder. PET bottles and aluminium cans fetch around ₹40–45 per kilogramme; MLP carries effectively no value at ₹1–2 per kilogramme once logistics are accounted for; the beverage carton commands ₹14–15 per kilogramme. Where cartons are mixed with grey board and corrugated into a bale the trade calls DMC, the blended material sells at only ₹10–12. The Kabadiwala has trained more than 10,000 kabadiwalas to segregate cartons separately for the premium, and collects in excess of 100 tonnes a year in the cities where it operates. Scale, he argued, is a function of awareness and segregation discipline rather than of any inherent limitation in the material.

MYTH 03

THE CLAIM

Cartons are too complex to recycle, and the recycling value chain does not really exist.

ON GROUND

Mr. Rajesh Ponnuru described ITC PSPD's Wellbeing Out of Waste programme, which collects aseptic cartons through dedicated streams before drum pulping and trommel technology separates the fibre. That fibre — long, strong and of high quality — returns to paper and paperboard production, appearing in everyday packaging from Colgate cartons and Taj Mahal tea to Flipkart and Amazon shipping boxes. Between 60 and 70 per cent of paper consumed globally and in India is recycled, and paper fibre can be cycled six to fifteen times. Mr. Aashish Shah described the complementary full-carton route at Deluxe Recycling: cartons are size-reduced to 12–15 millimetres and thermally compressed into sheets that substitute for wood and plastic panels. The most arresting statistic of the session followed — approximately 80 per cent of auto-rickshaws in India carry seats and backrests made from used beverage carton material.

MYTH 04

THE CLAIM

Recycling rates for beverage cartons are negligible, and there are too few recycling facilities.

ON GROUND

Dr. Suneel Pandey explained the TERI assessment, which started in 2011 across 11 cities selected based on beverage consumption and has been conducted every three years since. The latest study covered 24 cities and found that around 60–66% of used beverage cartons are recycled in these cities, which translates to about 48% at the pan-India level, while only 5–6% of used cartons reach landfills. The study involved extensive fieldwork, including consultations with waste collectors, scrap dealers and recyclers, along with detailed checks of waste bales and landfill samples. The study is publicly available on the TERI website. Ms. Gupta also highlighted the growing use of recycled carton material, including paver blocks recently installed at Shivaji Park in Mumbai and notebooks made from recovered fibre.

MYTH 05

THE CLAIM

Brands are not doing enough on the ground, and the recycled content value chain is not in place.

ON GROUND

Mr. Tusar Ranjan Pattnaik highlighted the significant growth of India's EPR compliance system, noting that the CPCB portal has expanded from 321 registrations in 2021 to more than 50,000 today, reflecting the shift from manual to digital processes. He also highlighted HCCB's awareness and engagement initiatives with waste management agencies, NGOs and recyclers, while cautioning that achieving the 50% recycling target for FY 2026–27 will be challenging without stronger waste segregation infrastructure. Mr. Shekhar Bissa added that India's challenge is not a lack of plastic waste, but the availability of consistent, certified and application-ready recycled polymers. He highlighted Reliance's ISCC-certified circular polymer operations at Jamnagar, which convert mixed plastic waste into pyrolysis oil and subsequently into food-contact-grade polymers through a mass-balance approach. With a current capacity of 6–7 KTA, the facility can scale up to 12 KTA and beyond using existing infrastructure.

Address by the Central Pollution Control Board

Shri G. Thirumurthy — Scientist, Central Pollution Control Board

Shri G. Thirumurthy acknowledged that he was still building his understanding of plastic waste management, having taken additional charge of the subject in December of the previous year. He appreciated the panel's discussion, which covered the entire waste management chain from segregation to chemical recycling. He also highlighted a key data gap, noting that some statistics generated through TERI studies are not maintained by CPCB and that

similar comprehensive assessments for plastic waste are yet to be undertaken. He then outlined the current status and data available through the EPR portal.

Indicator	Position as shared
Overall EPR target, all categories	27.22 lakh MT in 2022–23, rising to approximately 80 lakh MT in 2024–25 — nearly a threefold increase
Category III EPR target	3.6 lakh MT in 2023, rising to 9.04 lakh MT in 2024–25 — also close to threefold, and about 10% of the total EPR target
Registered entities on the portal	68,068 entities across PIBOs and PWPs — the highest of any sector
PIBOs producing MLP packaging	2,469 registered, against a total EPR target of 9.04 lakh MT
Target achievement	5.66 lakh MT achieved, or approximately 62% of target, as reflected in certificates generated
Registered Category III recyclers	440 recyclers with an aggregate processing capacity of about 10 lakh MT
End-of-life entities	175 entities with an aggregate processing capacity of about 53 lakh MT
Total Category III capacity	Approximately 63 lakh MT across recyclers and end-of-life processors
Beverage cartons within MLP	1.78 lakh MT, or roughly 20–21% of the MLP stream, equating to about 21 billion packages (figure shared with CPCB by AARC)
Recycled content mandate	5% mandatory from FY 2025–26 under the PWM Rules, not limited to the weight of the plastic layer, and inapplicable where food safety regulation does not permit it
Amendments to the PWM Rules	Ten to eleven amendments to date, the most recent on 31 March 2026

Regulatory Developments Signalled

Pursuant to the National Green Tribunal’s directions in Original Application No. 22 of 2022 before the Southern Zone Bench at Chennai, CPCB is developing common guidelines for the sustainable management of MLP packaging waste through a multi-stakeholder committee comprising government bodies, technical institutions, industry representatives and urban local bodies. The proposed guidelines will cover collection, segregation, transportation, recycling, end-of-life management, technology evaluation and institutional responsibilities, while also considering alternatives such as mono-material, compostable, paper-based and recycled-content packaging. CPCB is also engaging with chemical recycling operators, including Reliance and other refineries, to strengthen recycling solutions.

The pulp and paper industry receives no EPR credit today. CPCB is examining whether roughly 75 per cent of the credit can be extended to pulp and paper for the fibre they recover, with the remaining 25 per cent going to those who process the aluminium and polymer separately.

— Shri G. Thirumurthy, Scientist, CPCB

This was, in substance, a direct regulatory response to the asymmetry Mr. Ponnuru and Mr. Shah had raised only minutes earlier — a rare instance of an operational grievance being heard and acknowledged within the same session. Shri Thirumurthy also situated plastic waste management within the broader municipal framework, observing that implementation will remain difficult without the Solid Waste Management Rules 2026, which classify solid waste into four categories and whose implementation is being monitored at the highest level, with five secretaries engaged in the process.

Launch of the AARC White Paper

The session concluded with the formal release of the AARC White Paper on Beverage Cartons by Shri G. Thirumurthy, alongside AARC leadership and panellists. The 16-page paper examines the role of beverage cartons in India’s sustainability and net-zero goals, covering their composition, market landscape and life-cycle carbon footprint. Mr. Gokhale also highlighted lesser-known applications, including the use of UHT milk cartons by the Indian Army and fishing communities.



Access the White Paper

Scan the code to download the AARC white paper on beverage cartons in India. For queries, collaboration or membership, participants may write to the AARC Secretariat or visit the Alliance website.

Key Takeaways and the Road Ahead

#	Takeaway
1	Category II / Category III ambiguity persists on the ground, with recyclers registered under both.
2	Cartons hold real trade value at ₹14–15 per kg, well above MLP, and move through the paper stream.
3	Recycling stands at 48% nationally and 60–66% across surveyed cities, with only 5–6% reaching landfill.
4	Paper mills recovering carton fibre receive no EPR credit despite the full substrate counting towards producer obligation.
5	CPCB's MLP guidelines under the NGT direction are at draft stage, with public comments to follow.
6	The 50% recycling target for FY 2026–27 is at risk without stronger segregation infrastructure.
7	Certified food-grade recycled polymer capacity exists and can scale on existing assets.

The Secretariat records its appreciation to Shri G. Thirumurthy for engaging substantively with the concerns raised, to the Chairman and panellists for their candour, and to every participant who stayed the course of a session that ran well beyond its scheduled hour. Responses to questions received in the chat will be shared separately.