

Beverage Cartons in India: Advancing Food Safety, Sustainability, and Circularity



VIKSIT BHARAT (DEVELOPED INDIA) & ROLE OF BEVERAGE CARTONS

Beverage cartons contribute to the achievement of India's Viksit Bharat 2047 and Net Zero 2070 targets by enabling sustainable food packaging systems. The use of aseptic technology significantly reduces food loss and waste while ensuring shelf stability without relying on cold-chain logistics, or refrigeration. The sector supports local manufacturing and improves transport efficiency through lightweight packaging. Collectively, these attributes advance a circular economy by incorporating renewable materials and enabling recyclability. As India accelerates towards its milestones, beverage cartons can be enablers of safe food access and nutrition security and climate-conscious consumption - the essential building blocks of a Healthy, Safe and Developed India.

The purpose of this White Paper from AARC is to apprise stakeholders (policy-makers, regulators, think-tanks, businesses, academia, development sector, etc.) about the role and importance of cartons to help them make more informed decisions in the food safety and sustainable packaging discourse.



Viksit Bharat 2047

- ❑ Viksit Bharat 2047 is the Hon'ble Prime Minister's vision to make India a developed nation by 2047.
- ❑ It has set an ambitious target of a USD 30-40 trillion economy with inclusive development.
- ❑ Aim for advanced food processing to make India a global leader in agri & food value chains.
- ❑ Develop enabling infrastructure that supports delivering safe, nutritious food, reducing wastage, and help farmers reach national and global markets.



Net Zero Emissions 2070

- ❑ India's Net Zero by 2070 commitment was announced at COP26 as a pillar of the Panchamrit plan.
- ❑ Commitments to reduce carbon intensity by 45% and cut CO₂ emissions by 1 billion tonnes by 2030.
- ❑ Aim for net-zero greenhouse gas emissions across all sectors by 2070.
- ❑ Circular economy: waste-to-energy, sustainable materials, and recycling mandates.

Beverage Cartons are Positioned to Support this National Agenda



Aseptic Packaging

6-12 months shelf life, no refrigeration and no preservatives needed - reduces food waste by 20-30%¹



Nutrition Lock

Maintains high levels of sensitive vitamins (e.g., C, A) over shelf life by blocking light and oxygen, helping limit nutrient losses



Food Safety

Reduces contamination risk - sterile multilayer barrier blocks light, oxygen, microbes



Low Carbon Footprint

47%² lower carbon footprint vs PET packaging.
80%³ lower vs single-use glass packaging



Resource Light

~70-75% renewable paperboard, weighs 50% less than glass⁵; physical form and stackability allow for transport efficiency



Recycling Rate

India has a higher recycling rate of 48% vs the global average of 27%⁴

ABOUT AARC

AARC, or the Action Alliance for Recycling Beverage Cartons, is a not-for-profit industry alliance of producers of carton packaging and leading brands that use this form of packaging to pack products such as milk and dairy products, beverages (juices, ORS, etc.) and alcoholic beverages.

AARC is registered under the Society Registration Act, 1860, and holds both 12A and 80G certifications. AARC's members are committed to working together to promote paper-based cartons as a safe, circular and sustainable packaging solution that protects foods and beverages for the benefit of India's consumers, and which will boost India's food & beverage sector and propel India towards a more low-carbon future.

AARC Member Organizations



What are Beverage Cartons

As per IS 17753:2021, beverage cartons are paper-based multilayer laminated or extruded composite cartons used for packaging processed liquid foods and beverages. At their core, cartons are multi-material, paper-based containers designed and engineered to preserve, store, and transport liquid and semi-liquid food products safely.

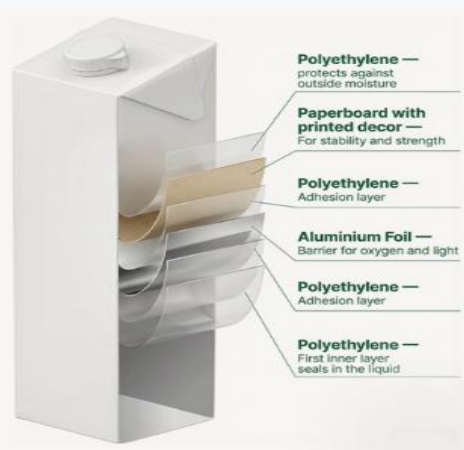
Combined with aseptic processing, a packaging method in which food or beverages are sterilised and sealed in sterile containers, cartons enable safe and longer shelf life for food products without refrigeration.

~70%
Paperboard Fibres

~25%
Polymer Layers

~5%
Aluminium Foil

~25%
Polymer L



In 2025, the world-renowned Institute of Food Technologists, HQ in Chicago, US, included aseptic cartons in its “Top 7 Food Packaging Innovations” list, noting that over 179 billion aseptic packages are used worldwide annually.

A Quick Glance at the Paper-based Beverage Cartons Market

GLOBAL BEVERAGE CARTON MARKET

USD 18.81 billion⁶

The current Global Beverage Carton Market; projected to grow to 30.53 USD Billion by 2035 at a CAGR of 4-4.5%

USD 1.15 billion⁷

Current Global Beverage Carton Machinery Market; expected to grow by 2030 at a CAGR of 4.8%

INDIAN BEVERAGE CARTON MARKET

USD 9.6 bn⁸

Indian beverage packaging market in 2024, projected to grow to USD 18.2 Bn by 2033 with CAGR ~6.75%

USD 71 mn⁹

Indian beverage cartons machinery market in 2024, projected to reach USD 100 mn by 2030 (CAGR 5.8%)

USD 2.5 bn¹⁰

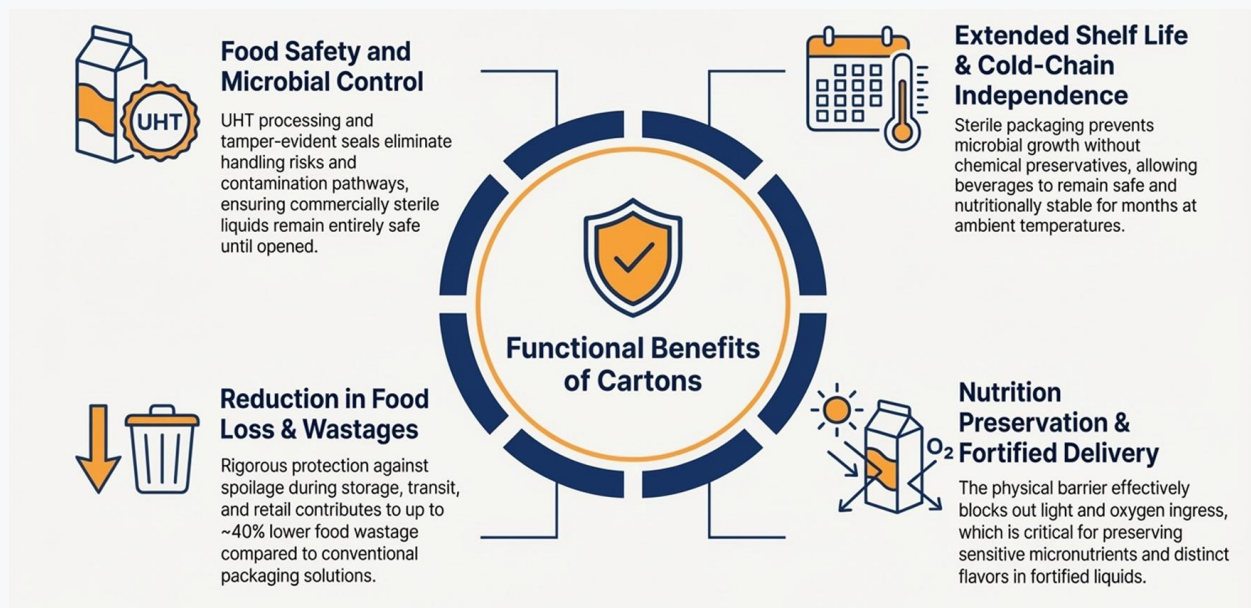
Indian liquid packaging cartons market in 2024

~17 billion cartons¹¹ consumed annually in India, expected to double by 2030

Beverage Cartons as Food Safety & Nutrition Enabler

Beverage carton technology has been widely recognised globally and in India since the late 1980s as a reliable and sustainable packaging solution that enhances food safety, preserves nutritional quality, and strengthens supply chain resilience.

Cartons combine aseptic processing and a multi-material, multi-layer paperboard structure to deliver food-safe, shelf-stable liquid foods with low transport weight and strong circular-economy potential.



Applications and Use Cases of Beverage Cartons

PM Poshan: Packaged Milk in Schools, Chandigarh



Survey¹² of 4,484 children and 57 stakeholders found strong acceptance of UHT milk in aseptic cartons, with 80% of students rating highly satisfactory. 82% of children placing empty cartons in designated bins, creating recycling and sustainability awareness.

Indian Army: UHT Milk in Cartons



Indian Army uses UHT milk packed in cartons at high-altitude and operational areas, where refrigeration and storage may be difficult. The Army consumes ~20 million¹⁴ milk cartons annually and has also initiated collection and recycling facilities through compacting facilities.

Fresh Milk & Beverages for Fishermen



For fishing crews taking multi-day trip, UHT milk in cartons is well suited to their needs, as cold storages on boats are for the catch. UHT milk can be stored at ambient temperatures stays safe 6-12 months without refrigeration.

Cartons for Alcohol Packaging



States like Uttar Pradesh, Karnataka, and others are using cartons for alcohol packaging to improve logistics, reduce adulteration, and supply-chain traceability. Alcobev companies see lower transport costs, reduced product loss.

Sustainability and Circularity in Beverage Cartons

Responsible Sourcing

Cartons are predominantly made from paperboard sourced from responsibly managed forests (FSC certified) and ASI-certified aluminium.

Material Substitution

Cartons are being developed by replacing the fossil-derived virgin polymer and the aluminium barrier with renewable (plant-based) materials, and chemically recycled polymers as per govt mandates.

Recycling Pathways & End Markets

Cartons are recycled through paper recycling ecosystems and chipboard units, thus achieving higher recycling rates (~48% in 2025) to develop products such as corrugated boxes, tissues, panels, sheets, etc.

Higher Renewable Component

Cartons are already made from ~70% renewable materials, and increasing the component of renewable materials will contribute to the renewability portfolio of the product.

Space Optimisation

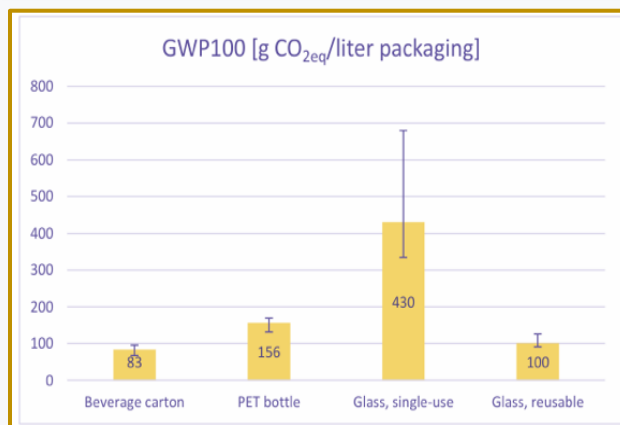
Cartons are typically 95% product and 5% packaging, and thus highly optimised for efficiency in transport and inventory storage compared to other packaging alternatives.

Environmental Savings

Cartons obviate the need for refrigeration/ cold chains due to the use of aseptic processing and packaging, thus eliminating the massive carbon footprint of refrigerated transport and storage.

Comparative Life Cycle Assessments (LCA)

A meta-analysis, based on a review of several LCA studies commissioned by members of the European Alliance for Beverage Cartons and the Environment (ACE) indicate that beverage cartons demonstrate a substantially lower global warming potential (GWP), expressed in grams of CO₂ equivalents per litre of packaged product, than several commonly used alternatives.



The comparatively strong environmental performance of beverage cartons is primarily attributable to their material composition, high packaging and transport efficiency. Beverage cartons are predominantly made from renewable, paper-based fibre sourced from responsibly managed forests, which contributes to lower lifecycle greenhouse gas emissions relative to more material- and energy-intensive packaging formats.

Collection & Recycling of Beverage Cartons in India

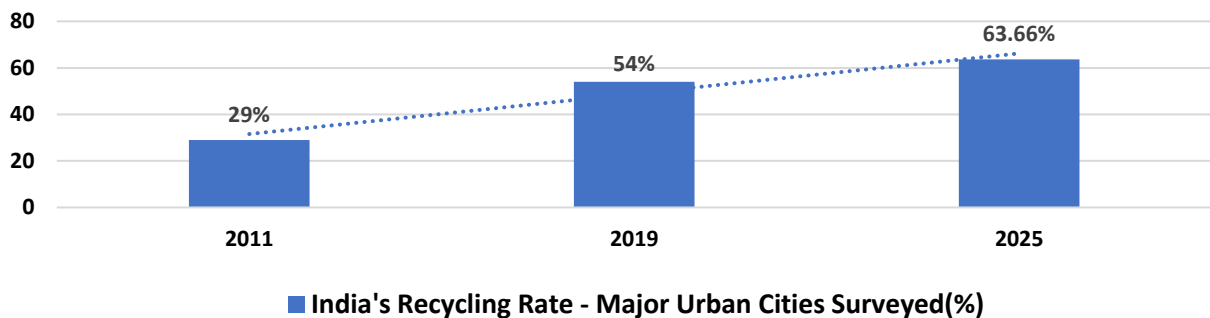
India's carton recycling network expands



Cartons are collected by a network of 30+ collection agencies, Material Recovery Facilities, Waste Management Agencies, and Army Collection Centres across India; and thereafter baled and sent for recycling to carton recyclers - paper mills, and chipboard units.

These recycling facilities have helped demonstrate steady systemic growth in carton recycling rate over the past decade, rising from 29% in 2011 to 45% in 2022, and reaching 48% by 2025. (TERI national extrapolations).¹⁴

India Carton Recycling Rate Evolution



Source: Estimates from multiple studies by TERI

Challenges for Recycling Pathways in India

Beverage carton recycling in India is progressing despite multiple systemic challenges across the entire value chain. These challenges stem from collection, segregation, technology, infrastructure, and market factors rather than consumer participation alone.

Contamination and Value Loss from Mixed Waste Streams

Beverage cartons often enter the municipal waste stream without segregation, leading to contamination with organic residues. This significantly reduces fiber yield and economic value, making recyclers less willing to collect or process them.

Inconsistent Consumer Disposal Practices

Lack of proper disposal practices for cartons such as emptying and flattening, results in liquid residue, odor, and bulkier waste. These factors cause contamination leading to inefficiencies and complications in the recycling process.

Integration of the informal sector

The informal sector remains a critical yet under-leveraged component of India's recycling economy. Limited formal capacity building, recognition, social security, and fair pricing mechanisms for these workers creates volatility in the supply chain.

Market Limitations

Limited market demand for recycled PolyAl and secondary fibers undermines financial incentives for investment in the recycling value chain.

Policy Barriers

Categorization of beverage cartons with multilayered plastic packaging under current EPR rules, despite the paper dominant composition of beverage cartons. This has led to recycling misalignment, industry and consumer confusion, and a non-sustainable perception for cartons.

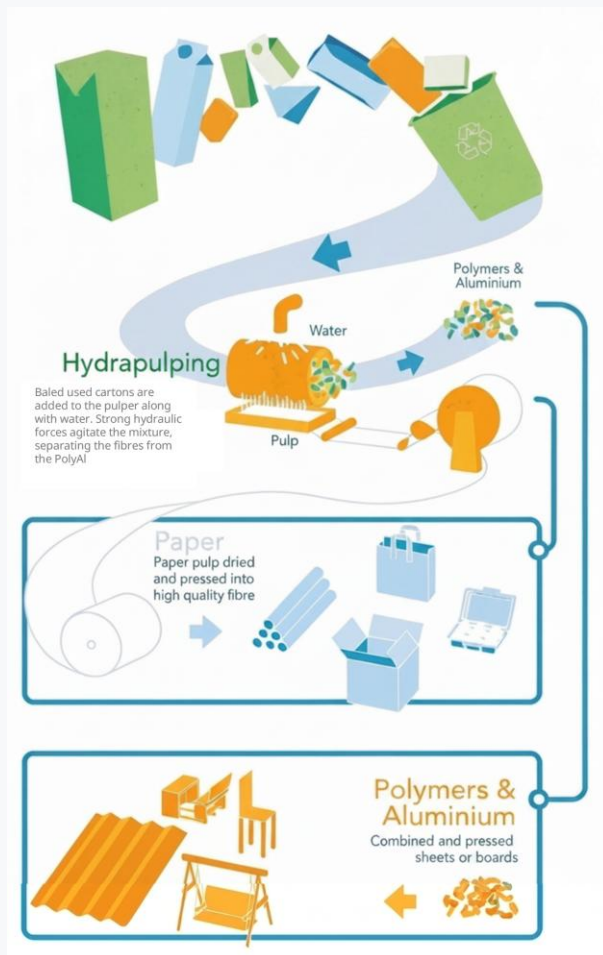
Despite the challenges, beverage cartons are increasingly being collected and recycled - due to increased recognition of its high material value, evolving technology, and industry initiatives.

- ❑ **High Inherent Fibre Material Value:** Cartons contain a particularly high-quality fibre (long, strong cellulose fibres) that can substitute for virgin fibre in higher-value fibre-based products.
- ❑ **Highly Recognisable:** Cartons are easy for consumers and waste pickers to identify, which supports efficient collection.
- ❑ **Advances in PolyAl Recycling:** New technologies and emerging higher-value end-markets are improving the separation of polymer and aluminium fractions.

Recycling Pathways for Beverage Cartons

Beverage cartons are composite, fibre-rich packages that are recycled across India through paper mills and chipboard units to develop sustainable paper-based and PolyAl products.

Due to their multi-material design, building a recycling system for beverage cartons requires a combination of recycling steps and pathways. Cartons are typically recycled in paper mills, which remain the most common recycling route, along with chipboard units.



End Use Applications of Recycled Materials



End Products from Recycled Beverage Cartons

Recycling of used beverage cartons has enabled the creation of a wide range of durable and value-added products, demonstrating the practical application of circular economy principles. By recovering high-quality paper fibres and composite materials, recycled cartons are transformed into new products across sectors such as construction, furniture, packaging, and consumer goods.



Autorickshaw Seats

~80% of all autorickshaw seats¹⁵ are made using recycled beverage cartons, showcasing circular material innovation in vehicle components. Part of a broader shift led by Bajaj Auto, TVS Motor Company and Atul Auto, leveraging carton recycling streams to build more sustainable commercial vehicles.



School Desks

School desks¹⁶ manufactured from recycled beverage carton, demonstrating circular use of post-consumer packaging waste. The initiative converts collected used cartons into durable classroom furniture, advancing recycling awareness and community sustainability impact.



Roofing Sheets

Roofing sheets for mobile and community toilets are made from recycled beverage cartons using Poly-Aluminium (PolyAl)¹⁷. Used in sanitation facilities, including those by Sulabh-type public toilets in several cities, these waterproof panels offer a durable alternative to metal or cement-based roofs.

Recycled paper recovered from used beverage cartons is used to manufacture a variety of new paper products, such as tissue paper, office paper, cardboard boxes, envelopes, and notepads. During recycling, beverage cartons undergo a hydropulping process in which the paper layer is separated from the plastic and aluminium layers. The recovered paper pulp is then converted into pulp sheets and used to produce different grades of paper products, including tissue paper, envelopes, and writing paper.



The EcoNatural product¹⁸ line includes table napkins made from paper recovered from beverage cartons, suitable for restaurants and catering services. These napkins are produced using the cellulose recovered during the recycling process and are typically unbleached and naturally coloured, reflecting the original carton fibres.



Lucart EcoNatural rolls¹⁹ are produced from paper obtained by recycling beverage cartons. The recycling process separates the paper component from polyethylene and aluminium, and the recovered paper is used to manufacture tissue paper products.

Social and Community Impact of Beverage Cartons

Product Integrity & Consumer Safety



Aseptic cartons help curb illicit alcohol risks by protecting authenticity and building consumer trust.

Inclusive Recycling Value Chain



Carton recycling generates livelihoods, strengthens community engagement, and improves working conditions for informal waste workers.

Employment and Income for Informal Workers



Beverage carton recycling generates social value by converting waste collection into employment and income opportunities for the fast-growing informal sector of workers, while also supporting community engagement and social inclusion.

Informal Sector Inclusion and Social Protection



Initiatives like Namaste Scheme and various other initiatives such as the 'Satma tool' use blockchain traceability to formalize carton waste collection, enable digital incentive payments, and improve informal workers' access to insurance and safety support.

Case Studies: Recycling Impact of Beverage Cartons



Alag Karo – Har Din Teen Bin: A Ward-Level Model for Source Segregation

Alag Karo – Har Din Teen Bin is a community-led waste segregation initiative driven by Tetra Pak India in partnership with Coca-Cola India, Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ), and SAAHAS, along with municipal bodies and RWAs.

- The initiative has reached over 260,000 citizens, enabling segregation adoption across 60,000 households and commercial units.
- The program delivered strong social value, generating ₹2.77–₹2.95 return per ₹1 invested²⁰.
- Implemented in Gurugram and piloted in Delhi, the program promotes three-way source segregation and integrates informal waste workers into formal recovery value chains.

Shelf-Stable Milk in Beverage Cartons for Disaster Relief

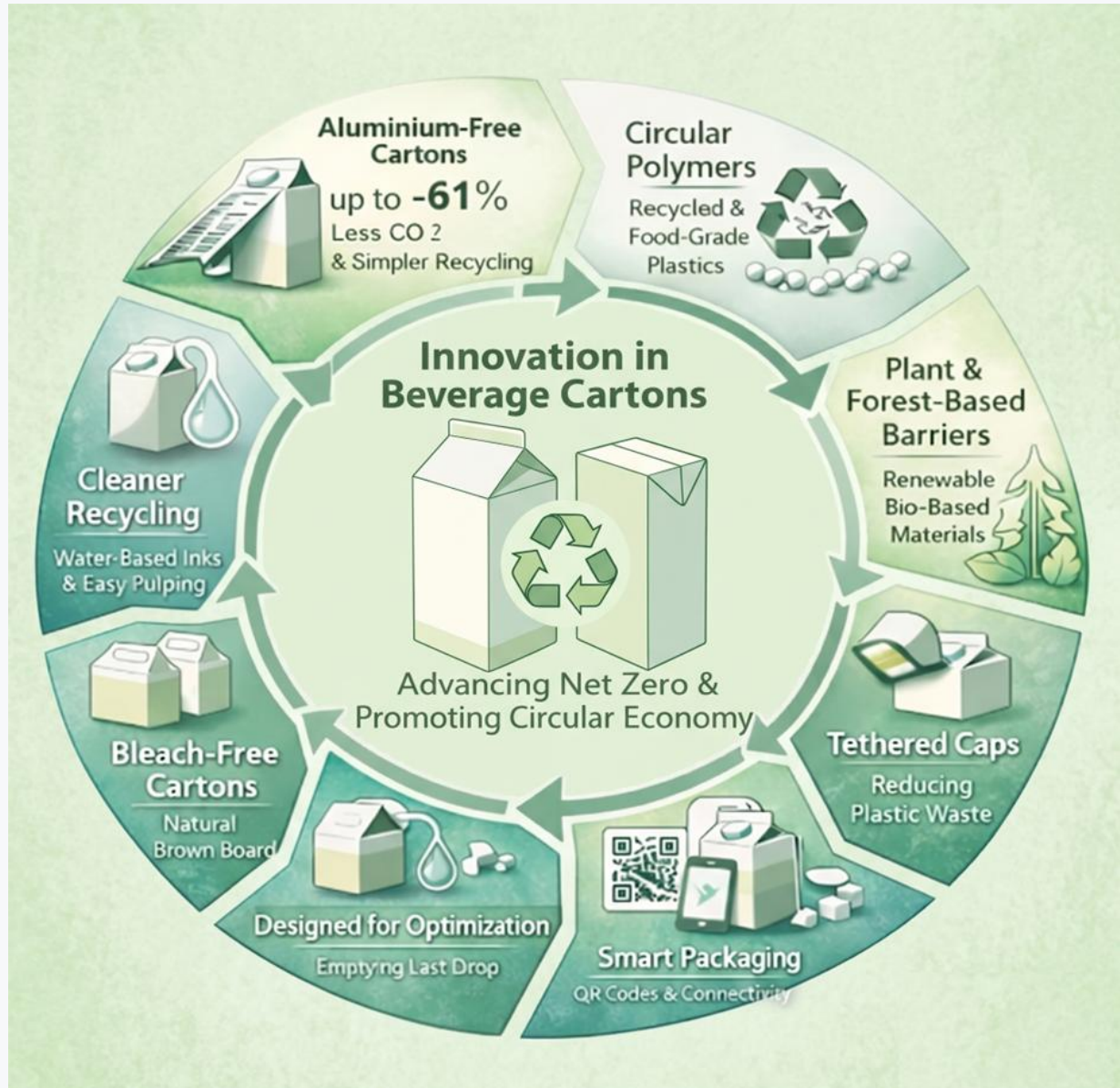
During natural disasters such as floods and cyclones in India, relief agencies distribute UHT milk packaged in beverage cartons to affected communities. The cartons ensure safe nutrition in emergency situations where refrigeration, clean water, and cooking facilities are unavailable.

- Emergency nutrition support: After Cyclone Fani in Odisha (2019), the National Dairy Development Board distributed over 6 lakh milk packets²¹ in beverage cartons to children in affected districts through Anganwadi centres and the district administration.
- Kashmir floods relief: During the 2014 Jammu and Kashmir floods, relief operations included around 3 tons of milk in beverage cartons along with packets of milk powder, helping provide safe nutrition to affected communities.²²



Innovations & Emerging Technologies in Beverage Cartons

The beverage carton industry is evolving through material innovation, design optimization, and circular solutions, thus reducing carbon footprint, improving recyclability, and enhancing consumer convenience while maintaining product safety.



Areas for Policy Intervention

Beverage cartons are fundamentally different from multi-layer plastics (MLPs) in both composition and material dominance. While beverage cartons are constructed from a multi-material structure, primarily their paper-dominant content; MLPs are predominantly composed of multiple fused plastic layers. There are several other ways in which they are distinct.

Parameters	Multi-Layered Plastics (MLPs)	Beverage Cartons (Aseptic)
Material Composition	MLPs are primarily different grades of plastics, bound together with adhesives, typically used as wrappers, pouches, and sachets.	Cartons are multi-material composite packaging, primarily of paperboard (~70-75%), with thin layers of polymer and an aluminium foil providing superior barrier protection.
Usage & Applications	MLPs are suited for lightweight packaging of dry snacks (e.g., chips, biscuits) and small-volume liquids (e.g., shampoo sachets).	Cartons are primarily used for liquid and semi-viscous foods (milk, juices, alcohol, soups) requiring aseptic (shelf-stable) protection that do away with the need for either preservatives or refrigeration.
Collection & Scrap Value	Several characteristics of MLPs, such as lightweight, easily dispersed by wind and high collection effort take away economic value for waste pickers; they are easily identified as being part of the plastic waste stream and away from high-value plastics (e.g., PET, HDPE, PP).	Cartons are recognised by the waste pickers as a separate grade, regarded as part of the paper waste stream, and they have an economic value that provides waste pickers with an additional means of livelihood.
Recyclability & Destination	MLPs are highly challenging to recycle because of multiple heterogeneous layers of plastics fused together with adhesives and a metalised layer; They are mostly considered “non-recyclable” and often destined for landfills or “end-of-life” / co-processing (waste-to-energy in cement kilns, road construction, etc.).	Cartons are recyclable and are prized by recyclers for their excellent fibre content and PolyAl; Paper mills recover the pulp and use it to make cardboard boxes, tissue, office paper, etc. The PolyAl fraction can be compressed into waterproof and fire-retardant composite boards, roofing sheets, etc., at chipboard units.
Material Identification Codes	Under the European Commission decision 97/129/EC, the EU established a standardised identification system for packaging materials, and plastics are under numbers 1 to 7 (PET as 1 and others, including MLPs, till 7).²³ MLPs are primarily classified under Chapter 39 because plastic is the main functional and structural ingredient. MLPs are governed under various IS codes due to different primary material compositions and requirements.	Cartons are identified as ‘composite packaging’ specifically under the code C/PAP 8424; this indicates a multi-material container made of paper, plastic, and aluminium, with paper (PAP) being the dominant material. Cartons are classified under Chapter 48 (Paper and paperboard) because paperboard makes up the majority of the weight (~70-75%). Cartons (aseptic and non-aseptic) are governed only by IS 17753:2021.

We can conclude without doubt that MLPs and cartons are distinctly different in a number of ways (dominant material should inform the package classification), this distinction merits an altogether separate categorisation for cartons.



Used Multi-layer plastic packaging



Used Beverage Cartons

Cartons should fall under a 'Paper EPR' or multi-material EPR and have a different identification code 'C/PAP 84'. Currently, cartons fall under scope of PMW rules under category-III, called as multilayered plastic packaging, shortened to MLP. Unfortunately, 'MLP' is the term that has been used for decades by the collection and recycling ecosystem to refer to 'multilayered plastics'.

This EPR categorization may be out of convenience, but it is inaccurate and creates confusion among waste pickers and consumers, leading to recycling misalignment, consumer confusion, and a non-sustainable perception. It potentially undermines more than 20 years of work that the industry has invested in carefully building the carton value proposition.

Policy Asks & Required Interventions



Enforce Source Segregation of Waste at Scale

Segregation of cartons at the source is still a huge challenge.

- Mandate strict enforcement of dry-wet waste segregation by ULBs with defined accountability and monitoring systems.
- Link segregation compliance to user charges and penalties to drive behaviour change.
- Leverage EPR funds to support awareness campaigns and on-ground enforcement mechanisms.



Formalize and Integrate Informal Waste Collectors

The carton collection system remains fragmented across municipal contracts, informal networks, and private systems.

- Integrate waste pickers into formal EPR and municipal systems through registration and aggregation networks.
- Enable direct linkage with recyclers and PROs to improve traceability and income stability.
- Provide social security, training, and safety support through EPR-funded programs.



Recalibrate EPR Frameworks

Cartons are classified under Category III, multilayered plastic packaging, within the plastic EPR framework, which means cartons are regulated mainly through their plastic component rather than as paper-dominant composite packaging.

- Create a distinct EPR category for beverage cartons to reflect their fibre-dominant, composite structure.
- Align EPR targets with fibre recovery outcomes, not just weight-based plastic metrics.
- Enable differentiated compliance mechanisms (including credit for paper recovery and co-processing of PolyAl).



EPR Certificates for Paper Recycling

Currently, EPR certificates recognize only the plastic fraction of cartons, so the fibre fraction recycled by paper mills is not fully credited.

- EPR certificates for paper component recycling of cartons.
- Recognition and counting of cartons recycled in mixed paper streams, so as to capturing of real recycling activity as much of the carton is recycled through this stream.
- Optimized rates for paper EPR certificates to reflect true cost of collection, sorting, recycling or disposal.



Develop End-Markets for PolyAl

Recovery of the PolyAl fraction is still emerging and mainly directed toward lower-value applications.

- Introduce fiscal incentives and standards to promote use of PolyAl in construction, infrastructure, and industrial applications.
- Mandate minimum recycled-content procurement (e.g., boards, panels, pallets) in public projects.
- Support R&D and commercialization of high-value PolyAl applications by funding research into advanced processing technologies.



Create Demand via Public Procurement

- Introduce mandatory green procurement norms for products with recycled content (including carton-derived materials).
- Prioritize recycled materials in government tenders (construction boards, packaging, infrastructure inputs).
- Establish long-term offtake agreements to stabilize demand for recycled outputs.

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Action Alliance for Recycling Beverage Cartons