

Circular Economy for Plastics Private Sector Workshop

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Circular Economy for Plastics Private Sector Workshop

About

The Circular Economy for Plastics (CEP) Private Sector Workshop was held on 1 and 3 December 2021 through the online platform, Zoom. The workshop was initiated by the Institute for Global Environmental Strategies (IGES) and organized together with UN-Habitat Philippines and the non-profit organization, Save Philippine Seas (SPS), under the Healthy Oceans and Clean Cities Initiative (HOCCI) project funded by the Government of Japan.

Over twenty participants representing micro, small, to medium enterprises (MSMEs), corporations, and associations in the private sector gathered to discuss existing circular economy initiatives in each of the six HOCCI partner cities and how to address the needs, challenges, opportunities, and benefits of the CEP.

Background and Context

The HOCCI Project aims to enable local governments and communities in the Philippines to reduce marine plastic pollution. Several scientific studies have recognized the substantial contribution of the Philippines to marine plastic pollution.^{1,2,3}

There is an estimated 0.75 million metric tonnes of plastic pollution from the Philippines that is leached into the ocean every year,⁴ negatively impacting the livelihoods of vulnerable coastal communities, and the country's tourism, fishing, and shipping industries. It has also affected coastal and marine ecosystems and biota.



¹ L.J. J. Meijer, T. van Emmerik, R. van der Ent, C. Schmidt, L. Lebreton. (2021). More than 1000 rivers account for 80% of global riverine plastic emissions into the ocean. Sci. Adv. 7, eaaz5803 (2021).

² Jambeck, Jenna R., Roland Geyer, Chris Wilcox, Theodore R. Siegler, Miriam Perryman, Anthony Andrady, Ramani Narayan, and Kara Lavender Law. (2015). Plastic waste inputs from land into the ocean. Science 347 (6223): 768-771. http://www.sciencemag.org/content/347/6223/768.

³ Lavender Law, Kara, Natalie Starr, Theodore R. Siegler, Jenna R. Jambeck, Nicholas J. Mallos, and George H. Leonard. (2020). The United States' contribution of plastic waste to land and ocean. Science Advances 2020; 6: eabd0288.

⁴ Ocean Conservancy, McKinsey Center for Business and Environment. (2017). Stemming the Tide: Land-based strategies for a plastic-free ocean. Retrieved January 17, 2022, from Oceanconservancy.org website: https://oceanconservancy.org/wp-content/uploads/2017/04/full-report-stemming-the.pdf



Philippine National Plan of Action on Marine Litter

The Philippine government has taken several efforts to address the country's waste management crisis. The updated Philippine Development Plan targets a national waste diversion rate of 80% by 2022, which will primarily be done through the enforcement of compliance to Republic Act (RA) 9003 or the Ecological Solid Waste Management Act of 2000.⁵ The Philippine Action Plan for Sustainable Consumption and Production identifies the strategies needed to improve, strengthen and fast track the implementation of existing policies on waste management (i.e., solid, hazardous, and electronic wastes) and circularity for plastics.

In 2021, the Philippine government launched the National Plan of Action for the Prevention, Reduction, and Management of Marine Litter (NPOA-ML). The NPOA-ML presents the country's ongoing and future strategies and actions to manage marine debris, particularly plastics. It recognizes the need for more concerted and unified efforts from all involved stakeholders in order to manage the country's ubiquitous problem of marine plastic pollution.⁶



Private Sector Involvement

To achieve its ambitious waste reduction and management goals, the government of the Philippines is targeting private sector participation and support.⁷ Through the Board of Investments, Department of Trade and Industry, and the Development Bank of the Philippines, the government offers financial assistance programs, as well as fiscal and non-fiscal incentives, to encourage private entities to develop and practice effective solid waste management.⁸ Small to medium enterprises account for more than 99% of registered businesses in the Philippines, and provide 60% of jobs.⁹

Their participation and commitment to waste management is integral to transition to a CEP. Major brands and multinational corporations, particularly those in the fast-moving consumer goods (FMCG) industry, have led the change by voluntarily committing to include more recycled content into their products; making their packaging recyclable and/or biodegradable; and/or increasing collection efforts. While these initiatives are expected to have positive impacts on the waste management and recycling sector, voluntary commitments will not be enough to divert the metric tonnage of waste away from landfills or natural environment.

⁵ National Economic and Development Authority. (2017). *The Philippine Development Plan.* Retrieved January 17, 2022, from Pdp.neda.gov.ph website: https://pdp.neda.gov.ph/updated-pdp-2017-2022/

⁶ Department of Environment and Natural Resources. (2021). *Philippine National Plan of Action for the Prevention, Reduction, and Management of Marine Litter.* Department of Environment and Natural Resources.

⁷ World Bank Group (2021). *Market Study for the Philippines: Plastics Circularity Opportunities and Barriers*. Marine Plastics Series, East Asia and Pacific Region. Washington DC.

⁸ WWF Philippines. (2020). *EPR Scheme Assessment for Plastic Packaging Waste in the Philippines*. WWF-Philippines. Retrieved January 21, 2022, from http://wwf.org.ph/wp-content/uploads/2020/12/WWF_REPORT_EPR_Philippines_pdf

⁹ International Trade Centre. (2020). Promoting SME Competitiveness in the Philippines: Compete, Connect and Change to Build Resilience to Crises. ITC, Geneva. Retrieved January 21, 2022 from https://www.intracen.org/uploadedFiles/intracenorg/Content/Publications/Philippines_SME_v6.pdf



Defining a Circular Economy for Plastics

Majority of the plastics used today are part of the linear economy, which operates on a take-makedispose model. The linear economy relies on the extraction of raw materials for the production of goods and services, and the wastes that remain are discarded. The counterproposal to a linear economy is a circular economy, which is a "framework for an economy that is restorative and regenerative by design."10 Following the same definition by the Ellen McArthur Foundation (EMF), a circular economy is based on three principles: (i) design out waste and pollution; (ii) keep products and materials in use; and (iii) regenerate natural systems. A CEP in practice could involve, but is not limited to, the following strategies: (i) reducing the need for plastic use and/or reducing the amounts; (ii) extending the life of products by reusing and repairing them; (iii) recovering parts and materials for upcycling or repurposing; (iv) using plastic waste as a resource for the same or another industry; and (v) redesigning products to replace non-renewable materials with renewable or regenerative ones.

A CEP can bring ecological, economic, and social benefits and positively impact businesses. By following the three principles of EMF, resources will be used more efficiently and effectively. Fewer raw materials (e.g., fossil fuels) will be extracted and used. This results in the reduction of pollution, greenhouse gas emissions, ecosystem degradation, and biodiversity loss, as well as reduction of risks to the supply chain.



Objectives of the CEP Private Sector Workshop

The CEP Private Sector Workshop was intended to provide a safe space for MSMEs to freely discuss their CEP-related initiatives, challenges, and concerns. It had the following objectives:



(i) increase the participants' awareness on CEP, and the needs, challenges, and benefits towards the transition to a CEP:



(ii) learn from the participants what the enabling factors are to increase their commitment/actions towards CEP (e.g., policies, subsidies, market-based instruments, etc.); and what the challenges and obstacles are that hamper their transition towards CEP; and



(iii) build a network of CEP champions/enthusiasts in the cities.

¹⁰ Ellen MacArthur Foundation. (n.d.). "What is a circular economy?" Circular economy introduction. Retrieved December 3, 2021, from https://ellenmacarthurfoundation.org/topics/circular-economy-introduction/overview

Methodology

The CEP Private Sector Workshop was held on 1 and 3 December 2021 through the online platform Zoom. Three weeks prior to the workshop, invites were sent to the stakeholders identified by city leads from UN-Habitat Philippines. Over 20 participants came from the HOCCI partner cities (Manila, Calapan, Legazpi, Ormoc, Davao, and Cagayan de Oro) and represented the following industries: recycling and plastics manufacturing, quick service restaurants and eateries, beverage manufacturers, groceries and retailers, agricultural sector, and consultancies. Invitees who were unable to attend the discussion due to schedule conflicts were consulted through a call or email interviews.

In order to protect the safety and privacy of the participants, the names of the participants and companies are not disclosed throughout the proceedings and will stay anonymous. The findings were shared with the HOCCI partner cities on 28 April 2022. This was important so that cities could learn about the enabling or disabling factors that affect companies from fostering CEP and to create an enabling environment within the city that will support CEP measures. Highlights from the presentation of findings can be found in the Appendix.

The roundtable discussion lasted approximately three hours, and was held in plenary format where the participants answered the guide questions below, with the facilitating team of SPS recording and scribing the answers.

Initiatives

- Are there any CEP strategies practiced in your company? If yes, what are they?
- What are the challenges?
- How does it affect revenue? What is the impact on suppliers and consumers?
- How are they accepted by your customers?
- What results do you see when practicing these strategies?
- Do you have plans to start new initiatives? If yes, what are they?
- · What are your risks and fears with CEP practices?
- How can you avoid or mitigate the risks?

Challenges

- If there are no or limited CEP practices, what are the barriers to implementation?
- Are the barriers social, technical, financial or institutional?

Enabling factors

- What would make a circular economy for plastics possible?
- What is the role of the local government?
- Do you know other businesses implementing CEP?
- If you are looking to adopt (more) circular practices, what would you focus on or prioritize? What would be needed to make this change?
- Do you see any opportunity to establish collaborations with other businesses or organizations to achieve CEP in your city?



Scope and Limitations

The discussion and outcomes are limited in scope and are intended to give a basic overview of the current state of CEP in the HOCCI partner cities and in the industries represented. They are not meant to reflect the private sector of the Philippines as a whole. The data gathered will be used to gain insight on the enabling factors that can be promoted in the HOCCI partner cities and the country. The identified industries that joined in the discussion are believed to have the most interest in or most benefit to gain from transitioning to a CEP.



Emerging Themes

This section summarizes the existing CEP practices, challenges, and recommendations that emerged from the discussions.

CEP practices per city

City	CEP Practices
Calapan	A chain of quick service restaurants (QSR) has switched from single-use plastics and styrofoam packaging to reusable melamine wares for dine-in customers and alternatives like paper for take-out. They have also changed the default behavior by making disposable utensils available upon request instead of automatically adding them to the order.
	A packaging and printing service upcycles their sticker waste as adhesives for packaging, while their misprints are shredded and used as fillers to protect fragile items such as mugs and glasses.
	A low- or zero-waste eco-store avoids using plastics when supplying or refilling stocks. The eco-store also only offers paper bags or asks their consumers to bring their own containers when refilling items.
	A grocery retailer follows the city-wide mandate of the LGU to use paper bags as an alternative for plastics, and encourages the use of reusable bags and containers for wet items. 11 Empty cardboard boxes are used when packaging bulk purchases. The retailer also raises awareness and educates customers on these new policies.
Cagayan De Oro	A public market bans the usage of large and medium-sized plastics, using paper bags as an alternative for dry goods. It allows plastic bags (roll bags, locally called plastic labo) for wet goods and meat.
	A beverage company follows the ordinance to reduce plastic-use in business operations, and adheres to RA 9003 on solid waste management through an ongoing partnership to treat any residual waste. The company also conducts coastal clean-ups to raise awareness and involve stakeholders.

City	CEP Practices
Davao	A beverage company has been using in-house materials recovery facilities (MRFs) in all of their plants since the first quarter of 2019. Since then, all waste produced in the company's business operations are sorted internally and sold to other industries that need or would benefit from the recyclable plastic waste. Minimal waste is then brought to a sanitary landfill. The company's waste management programs are extended to nearby communities. It also implements its own information, education, and communication (IEC) programs to raise awareness on the circular economy.
Legazpi	A management consultancy firm promotes the concept of circularity to clients and practices circularity in-house. For example, they minimize use of single-use plastics in the office and prefer reusable materials.
Manila	A recycling facility has been doing advocacy and awareness work in partnership with plastic manufacturers and the private sector for almost four decades. A plastics manufacturer has been upcycling low-value plastics (such as sachets and plastic bags) and other plastics that are difficult to recycle, and manufacturing them into school chairs, trash bins, and pavers. The manufacturer has also been conducting awareness-raising activities and creating livelihood and additional sources of revenue for those that donate plastics.
Ormoc	A QSR follows the city-wide mandate of regulating single-use plastics ¹³ by not serving straws or plastic utensils to consumers and shifting plastic packaging to paper. The restaurant staff also helps in educating consumers about the transition from plastic to paper-based or reusable items. Following the mandate of the LGU, the local chamber of commerce encourages other QSRs and eateries in the city to no longer provide single-use plastics for take-outs. An agricultural exporter manufactures plastic as part of its business operations and has a fully functional MRF in-house, resulting in minimized waste generated. Plastics used in certain operations are also washed and recycled to be reused. A local eatery offers bulk or wholesale food trays using traditional, recyclable containers such as the native <i>bilao</i> (a flat, circular tray usually made from rattan or bamboo) and offers discounts for consumers that have their own containers.

¹² Llemit, R. L. G. (2021). "Davao: No single-use plastics now a law." SUNSTAR Davao. Retrieved January 20, 2022, from https://www.sunstar.com.ph/article/1898320/davao/local-news/no-single-use-plastics-now-a-law

13 City of Ormoc. (2021). City Ordinance No. 52-2021, "Ormoc City Single Use Plastic Products Regulation Ordinance of 2021"

Challenges

Proper solid waste management in an archipelagic country is already a challenge in itself, especially with limited access to sanitary landfills and functional MRFs, low capacity and compliance for recycling and segregation, low prioritization of LGUs, and a general indifference of communities for proper waste management.¹⁴

The participants were asked if their CEP practices affected revenue generation, and how their suppliers and consumers reacted to these practices. The participants were also asked what kind of social, technical, financial or institutional barriers they faced in implementing CEP practices.

Industry	Challenges
Recycling and plastics manufacturing industry	A plastic recycler mentioned that the demand for products made of recycled plastics is low or unstable, and there is little to no market for recycled plastics in the country. It is also difficult to ensure that the locally available recycled products are durable and of high quality. The movement towards bio-based plastics has the possibility of competing with food and animal feed production in the future. Compostable materials mixed with other types of materials (e.g., plastics, metals) would be difficult or impossible to recycle due to the absence of industrial composting facilities in the Philippines. A plastic producer, who has been in the industry for thirty years, said that existing systems (e.g., policies, community behavior, infrastructure) should be modified and changed, as there is not just one solution that can solve the problem.
Food and beverage industry	A company representative from a QSR shared that plastic bags, straws, and utensils are single-use plastics that are often regulated/banned in city-wide ordinances. Reusable alternatives and the bring-your-own approach are viable options to these items. Other types of plastics like sachets and sauce packets currently do not have reusable alternatives or alternative packaging, making implementation of single-use plastic bans/regulations difficult. A QSR employee added that plastic alternatives are not commonly available, especially in sites outside Metro Manila. There is also a limited product and market development for recycled plastics.

¹⁴ Department of Environment and Natural Resources. (2018). National Solid Waste Management Report 2018. Environmental Management Bureau. Retrieved February 7, 2022, from https://emb.gov.ph/wp-content/uploads/2019/08/National-Solid-Waste-Management-Status-Report-2008-2018.pdf

Industry	Challenges
Groceries and retailers	Finding alternatives to plastic, especially for wet goods, is challenging. Paper bags and other alternatives are set at a higher and more expensive price point than plastics. Paper-based packaging is also not suitable for wet goods. Due to a city ordinance banning single-use plastics, a popular QSR no longer serves food in plastic containers but in paper or cardboard packaging that is lined with plastic. The packaging becomes non-recyclable because it is difficult to separate paper and plastic. The bleed-through of grease into the paper packaging renders it non-recyclable. Despite retailers following the LGU's mandate on banning single-use plastics, there is minimal or little support from LGU when looking for suppliers of viable alternatives. Retailers have also faced the brunt of consumers' ire when alternatives are more expensive/not provided. One representative observed that it took two years for their customers to adjust to the transition. Some retailers mentioned that another challenge is the reduced income stream. Initially, businesses gained additional revenue from selling empty cardboard boxes to recyclers. Due to the ordinance banning single-use plastics, the cardboard boxes are now used as an alternative container for customers' bulk purchases.
Agricultural sector	An exporter shared that reusing plastics for business operations has led to the increased consumption of other resources such as time, water, cleaning agents, and human resources required to accomplish these tasks.
Other MSEs	There is a lack of recycling facilities and MRFs in many locations. Even with the presence of these facilities, a beverage manufacturer reported that waste sorting remains a challenge, despite all components of clear polyethylene terephthalate (PET) bottles being highly recyclable.

Enabling Factors and Recommendations

Any action towards a CEP must be done on all levels of governance and by different stakeholders, starting with governments, communities, and the private sector simultaneously. The participants identified the following recommendations to foster an enabling environment for CEP:

Enabling Factor	Recommendation		
	INSTITUTIONAL		
Prioritization of CEP by the local government	LGUs are mandated to implement the Philippines' Ecological Solid Waste Management Act. According to the participants, a concerted effort for CEP at the city level must be the bare minimum to have any lasting positive impact. The LGUs must engage with the private sector for decisions made regarding waste management and segregation, as their business operations, and consequently, their consumers, will be affected by any initiative or policy.		
CEP as a legislative agenda for future investments	The national government could set up an oversight committee dedicated to circularity to address and support CEP issues. The committee should be at the forefront of lobbying for legislation encouraging the business sector to engage in circular economy practices, in alignment with the Philippines' Investment Priority Plan.		
Legislating incentives and disincentives	The legislation should have provisions for incentive schemes to drive behavior change, such as requiring businesses to provide a list of potential waste volume sources and disposal methods as prerequisites for annual business permit renewals. It should also have penalties if businesses fail to comply with existing legislation.		
Compliance and enforcement	While policies and ordinances will help improve solid waste management, some participants believe that they are not enough. Currently, existing legislation and other relevant policies enacted in the future should be reinforced and strictly implemented, with complementary activities such as IEC campaigns and capacity-building workshops. If consequences are not clear or adhered to, there will be little to no motivation for businesses to comply.		

Enabling Factor	Recommendation	
FINANCIAL		
Financial support from multinational companies	Multinational companies have continued to support MSMEs in sustaining relevant CEP initiatives. Their revenue was affected due to quarantine and lockdown measures brought about by the COVID-19 pandemic.	
Financial disincentives	In cities where there are ordinances banning single-use plastics, retailers could put a cost on single-use plastics to assist in the social preparation.	
TECHNICAL, PHYSICAL, AND SPATIAL		
Developing plastic alternatives	Packaging industries must invest in developing alternatives for packaging liquid items or products, such as condiments.	
Establishing infrastructure	There is untapped potential in leveraging on private and public partners in constructing infrastructure needed to enable CEP (e.g., introducing more recycled content in plastics already existing in the market, increasing research for biodegradable packaging, or a nationwide rollout of refilling stations for home care, personal care, and cosmetics).	
	SOCIAL AND PSYCHOLOGICAL	
Collaboration among MSMEs for IECs	Businesses can work together to increase the awareness and participation of their consumers and communities in CEP practices. A phased approach to training and IEC activities can lessen the burden on consumers, help businesses understand the needs of their consumers, and prepare viable alternatives. By having gradual social preparation, altercations and problems with consumers could be avoided.	
Circular mindset	Businesses must embed the mindset of circularity in all aspects of operations and provide an enabling organizational structure (such as key performance indicators and incentives) to achieve this. Some participants expressed that the circular mindset would raise the standing of the companies in accordance with their environmental, social, and corporate governance standards, and enhance profitability by having less waste and lower disposal costs.	

Appendix: Focus Group Discussion with Partner Cities

A focus group discussion (FGD) was held on 28 April 2022 through the online platform Zoom to present the highlights of the proceedings from the workshop held in early December 2021. The attendees of the FGD were representatives from the HOCCI partner cities and LGUs. The attendees also participated in a short dialogue to discuss what actions LGUs can start, assess, or sustain in order to create an enabling environment for the private sector to transition to a CEP. The dialogue used the programmatic clusters and strategies identified in the NPOA-ML as the guiding framework.

The NPOA-ML programmatic clusters and strategies can be found below:

NPOA-ML Strategies



Programmatic Cluster

STRATEGY 1:

National Marine Litter Baselining

STRATEGY 2:

Circular Economy and Sustainable **Consumption and Production**

STRATEGY 3:

Recovery and Recycling

STRATEGY 4:

Collection and Disposal

STRATEGY 5:

Shipping and Fisheries Waste Control

STRATEGY 6:

Cleanup of Riverine and Marine Environments



Enabling/Cross-cutting Cluster of Actions

STRATEGY 7:

Policy and Enforcement

STRATEGY 8:

Social Marketing and Communication

STRATEGY 9:

Sustainable Financing and Resource Allocation

STRATEGY 10:

Strengthening Local Action

APPENDIX — 12



Strategy 1 National Marine Litter Baselining

Manila City: The LGU is currently in the process of conducting a Waste Analysis Characterization Study (WACS) to identify the city's composition of plastic waste and sources to more effectively address it.





Strategy 2Circular Economy and Sustainable Consumption and Production

National: Many LGUs have regular slogan-making and poster-making contests for generic information and education campaigns for waste reduction. In addition to this, LGUs could incentivize design thinking for a circular economy.





Strategy 2 & 3

Circular Economy and Sustainable Consumption and Production, Recovery and Recycling

Calapan City: The city collects recyclable wastes which are then traded to a local recycling facility. The recyclable wastes are used in the fabrication of tables, chairs, pavers, and slabs. After the materials have been fabricated, LGU buys them back to be used in the city's projects.

Legazpi City: A community-based organization in the city aims to collect election-related paraphernalia to repurpose as bags. The project provides livelihood opportunities for the participants, as well as encourage the recovery of reusable and recyclable materials.

Manila City: A community-based organization in the city reuses 1.5- and 2-liter PET bottles into pots. The project provides livelihood opportunities for the women and encourage the recovery of PET bottles, which are highly recyclable materials.



APPENDIX — 13



Strategy 3 & 7

Recovery and Recycling, Policy and Enforcement

National: After the 2022 national elections, there was a high volume of tarpaulins and other campaign paraphernalia (including but not limited to shirts, flyers, baller bands) that will be disposed. Currently, the LGUs are the ones who bear the brunt of dismantling and disposing of the election paraphernalia.

One the recommendations of the participants was for the Commission on Election (COMELEC) to have a policy to include the recovery and disposal of campaign materials as part of the conditions when politicians file for candidacy. The policy should also include a tax or levy for politicians which will be used in the collection and disposal of the materials to enhance recycling coverage.

National: There is a need to create/enhance the market for recycled and upcycled products. Part of this initiative is an inventory or directory of recyclers that can facilitate plastic circularity in the partner cities and nationwide.





Strategy 3 & 8

Recovery and Recycling, Social Marketing and Communication

A multinational corporation has partnered with a news outlet in promoting plastic drop-off locations all over the country. Through crowdsourcing on various media, they were able to identify recyclers in Visayas and Mindanao. Previously, most of the visible locations were only based in Luzon/Metro Manila.





Strategy 7 Policy and Enforcement

Legazpi City: The LGU made plans to adopt the provincial ordinance banning single-use plastics in 2021. It is currently under review by the city government's local legislative body. As of writing, multi-stakeholder discussions are underway on the regulation of single-use plastics in the city.

National: Several city representatives observed that some LGUs offer a fee/plastic tax as an alternative to total bans on plastic bags. While this can be effective in encouraging some consumers in bringing reusable bags, there needs to be an established and effectively managed fund system to collect and manage the environmental charges. Some suggestions raised by the participants for the use of plastic tax funds is to go into the LGU's information and education campaign for recycling and solid waste management programs.

In conjunction with this, it is also important to assess the unintended negative social impact of an environmental policy or action, as mentioned by one of the participants. For example, there were schools that incentivized collection of plastics in schools, where students were given bonus points when bringing plastics, leading students to buy more items in plastic. The unintended negative social consequence is that parents/ families of the student would buy more plastics to get more bonus points.





Legazpi City: It is mandatory for businesses to attend a business establishment seminar which talks about the City's solid waste management system and programs as well as other environmental initiatives, and how commercial establishments can assist in segregation at source. During that seminar, the city also introduces ways on how businesses can minimize the waste that they produce.

National: LGUs should enforce at source segregation. As of now, the recovery of recyclables isn't practiced nationally. LGUs should also invest resources in organizing communities and formalizing them into organizations. Empowering communities to participate in the circular economy model will open up the breadth of livelihood opportunities available in the model.

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