

# Comparative Analysis of Plastic Waste Management and Circular Economy Policy in ASEAN Countries

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# Outline

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- ▶ 3. Regional policy trend
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# 1. Project objectives and components

## *“Circular Economy Regional Gap-analysis: Reviewing Actions by National Governments”*



with support from the Enhanced Regional EU-ASEAN Dialogue Instrument (E-READI)

### **Overall:**

- ◆ To develop a knowledge base for follow-up actions, mainly in the form of EU-ASEAN collaboration and dialogues, in line with the international aspects of the EU Plastics Strategy

### **Main components:**

- ◆ Review government policies and legislations
- ◆ Identify countries and policy areas where there is both high potential for improvement and strong interest in in joint follow-up action
- ◆ Stakeholder mapping, examples of initiatives by non-state actors
- ◆ Explore the need for and interest in a regional initiative on Circular Economy, in particular targeting plastics

## Expected project outcome and follow-up

- ◆ Report to be launched at a regional Circular Economy workshop, tentatively back-to-back with the EU DG Environment's Circular Economy Mission to Malaysia in June 2019
- ◆ Follow-up assistance:
  - E-READI: Advice on legal strengthening
  - Upcoming EU Partnership Instrument project on Marine Litter: Policy dialogues, pilot projects, capacity strengthening, technical assistance
  - Other bi- and multilateral initiatives

## 2. Challenges faced by ASEAN countries

### Increasing consumption of single-use plastics

- ▶ Due to Economic growth, Rapid urbanization, Changing consumption & production patterns

### Growing “takeaway food culture”, “E-commerce”, and “Sachet economy”

- ▶ E.g.) Between 2014-2018: Packaging market increased by an estimated 7.06% in Indonesia, 5.57% in Thailand, 4.2% in Singapore, 3.61% in Malaysia and 3.31% in the Philippines.

### Shift of waste plastic trade from China to ASEAN (particularly to ASEAN-6: Indonesia, Malaysia, the Philippines, Singapore, Thailand, and Viet Nam)

- ▶ ASEAN accounts for about 20% of global plastic production

### Lack of waste collection infrastructure and improper waste management

### Lack of reliable data on waste flows

### Informal recycling

### 3. Regional policy trend

*Moving from the linear model of ‘take, make and dispose’ to a circular economy of ‘reduce, reuse and recycle’ (3R)*

Examples of National Actions towards tackling marine plastic issues

- Indonesia: National Action Plan on Marine Debris (2017-2025)
- Viet Nam: Prime Minister’s Decision No. 06/2018/QD-TTg of 2018
- Thailand: Plastic Debris Management Plan (2017-2021)

Attempts to apply EPR principles in the packaging sector

- Potential approach to assigning responsibilities for packaging waste management

*However, few specific policies or legal frameworks addressing packaging waste management*



# Voluntary Actions by Private Companies

E.g.)

- ❑ PRAISE in Indonesia:  
Engaged in recycling as well as public education and awareness raising activities
- ❑ Alliance for Recycling and Materials Sustainability (PARMS) in the Philippines:  
Multi-sectoral coalition composed of top consumer goods companies, plans to build a 25 million PhP (460,000 US\$) recycling facility for plastic sachets in Metro Manila
- ❑ Singapore:  
Launched the Singapore Packaging Agreement (SPA) in 2007 -  
Encouraging producers to adopt cost-effective solutions to reduce packaging waste





## Related International Declarations

- ❑ SDGs Goal 12 & Goal 14
- ❑ Voluntary commitments during the UN Ocean Conference in June 2017
- ❑ G20 Action Plan on Marine Litter
- ❑ UNEA resolution on 'Marine litter and microplastics'
- ❑ UN Convention on the Law of the Sea
  - signed by all ASEAN countries (except for Cambodia)





# Regional Dialogues

- East Asia Summit
- Partnerships in Environmental Management for the Seas of East Asia (PEMSEA)
- Asia-Pacific Economic Cooperation (APEC)
- Recent ASEAN Dialogues on Marine Litter:

ASEAN Conference on Reducing Marine Debris in ASEAN Region  
(held on 22-23 November 2017)

29<sup>th</sup> ASOEN Meeting (held on 15-16 August 2018) - Recognised the importance of tackling marine debris issues in ASEAN

Coordination Meeting on Marine Debris Action in ASEAN was held in January 2019 (back-to-back with the 20<sup>th</sup> Meeting of AWGCME)



## 4. 3R policies for plastics in ASEAN countries

|           | Strategy  | Ban of single-use plastics  | Levy/charge on single-use plastics  | Deposit-refund scheme | EPR-based recycling policies  | Sorted collection   |
|-----------|---|---|---|-----------------------|---|---|
| Singapore | No  | No  | No  | No                    | Mandatory reporting requirements for packaging data and packaging waste reduction plans by 2021 | National Recycling Programme  |
| Brunei    | No  | No  | No  | No                    | No  | No  |
| Malaysia  | Roadmap towards Zero Single-Use Plastics (2018-2030)  | No  | Pollution charge (2019-)<br>Ban on non-biodegradable plastics (Federal territories)<br>Levy on plastic bags (Penang state)<br>Ban on polystyrene (Penang) | No                    | Not yet applied   | Pilot level in selected city areas  |
| Thailand  | -Master Plan on Plastic Waste Management<br>-National Roadmap for the -Development of Bioplastics Industry<br>-Establishment of National Taskforce for Plastic Waste Management | Partial phasing out of plastic bags at national hospital<br>Ban of using plastic bags and Styrofoam in National Parks (2018-) | N.A.<br>Planning possible tax mechanism   | N.A.                  | N.A.  | Law for Promotion of Source Segregation (2020)<br><br>“Zero waste project” at community level |

## 4. 3R policies for plastics in ASEAN countries

|             | Strategy   | Ban of single-use plastics                                      | Levy/charge on single-use plastics | Deposit-refund scheme | EPR-based recycling policies | Sorted collection                      |
|-------------|--|---|------------------------------------|-----------------------|------------------------------|--|
| Philippines | No   | Partial/local bans on the use of plastic bags (city level)      | No                                 | No                    | No                           | Yes                                    |
| Lao PDR     | No   | No  | No                                 | No                    | No                           | Mandatory                              |
| Viet Nam    | No (National Strategy on ISWM to 2025, vision to 2050) |   | Levy on non-biodegradable plastics |                       | Not yet applied              |  |
| Myanmar     | No   | Partial<br>-Ban on thin plastics (Yangon Mandalay, Nay Pyi Taw) | No                                 | No                    | No                           |  |
| Cambodia    |  | No  | No                                 | No                    | No                           | Sub-decree on plastic waste management |

## 4. Continued

|           | Voluntary scheme/pilot projects  | Marine plastic pollution prevention   | Prevention of littering                              | Import regulation            |
|-----------|--|---|--|------------------------------|
| Singapore | Singapore Packaging Agreement<br><br>Schools Recycling Corner Programme  | The Prevention of Pollution of the Sea Act and Regulation (ban of throwaway of synthetic fishing gears etc) | Environment Public Health Act (littering in general) | No                           |
| Brunei    | No   | Prevention of Pollution of the Sea Order (General)  | Sub decree in 1999                                   | No                           |
| Malaysia  | -  |   |  | Taxation of waste plastics   |
| Thailand  | -3Rs in Government office(Target setting for reduce and not using single use plastics)<br>-Pilot Project on Plastic Waste Collection in Coast<br>-Campaigns to axe plastic cap seals of drinking water Bottles<br>-Many private company campaign |   |  | Import ban on plastic wastes |

## 4. Continued

|             | Voluntary scheme/pilot projects               | Marine plastic pollution prevention   | Prevention of littering | Import ban   |
|-------------|---|---|-------------------------|--|
| Philippines | Local bans on the use of plastic bags         | Manila Bay Clean Up   | No                      | No   |
| Lao PDR     | Community solid waste management project      | No  | No                      | No   |
| Viet Nam    | Program on control of waste from plastic bags | Not specifically mentioned (Law on Marine and Island Natural Resources and Environment) | No                      | Trade import regulation for quality<br><br>Considering tax for import of single-use plastics |
| Myanmar     | No  | No  | No                      | Considering  |
| Cambodia    | No  |   |                         |  |

# 5. Initial Findings

- ▶ There are global and regional political momentums to mainstream Circular Economy and address plastic pollution.
- ▶ In reality, mostly voluntary initiatives, local regulation for single-use plastic bag ban, some pilot projects
  - ▶ Mixed results of efforts to ban single-use plastic items
- ▶ Need to develop or to update general framework legislation for MSW management(starting point) (except for Malaysia, Thailand, Philippines, and Indonesia)
- ▶ Some countries with general framework legislation in place have started to develop/implement roadmap or strategy for plastic management/single-use plastic management.
- ▶ Introducing EPR-based policy could be one of the next steps for these countries.
  - ▶ EPR is not a fixed concept - Tailoring to local situation necessary
- ▶ For these, dialogue with stakeholders is needed (involving business sector(brand-owners/retailers), local governments, consumers group and central government) to review situation of plastics and packaging, collect data and identify concrete policy options.
- ▶ Overall, there's a need to review how government policies affect the full life-cycle of plastics and address inconsistencies