

OECD PLASTICS OUTLOOKS: FROM A GLOBAL PERSPECTIVE TO A FOCUS ON ASEAN PLUS THREE COUNTRIES

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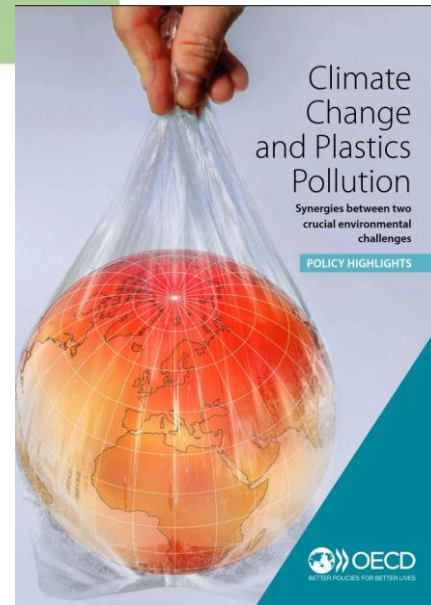
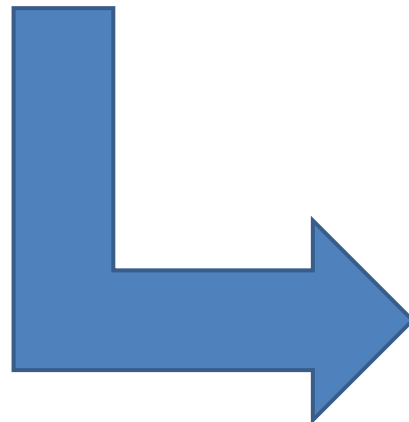
Building on OECD modelling work on plastic leakage to the environment & policies



Global Plastics Outlook
ECONOMIC DRIVERS, ENVIRONMENTAL IMPACTS
AND POLICY OPTIONS

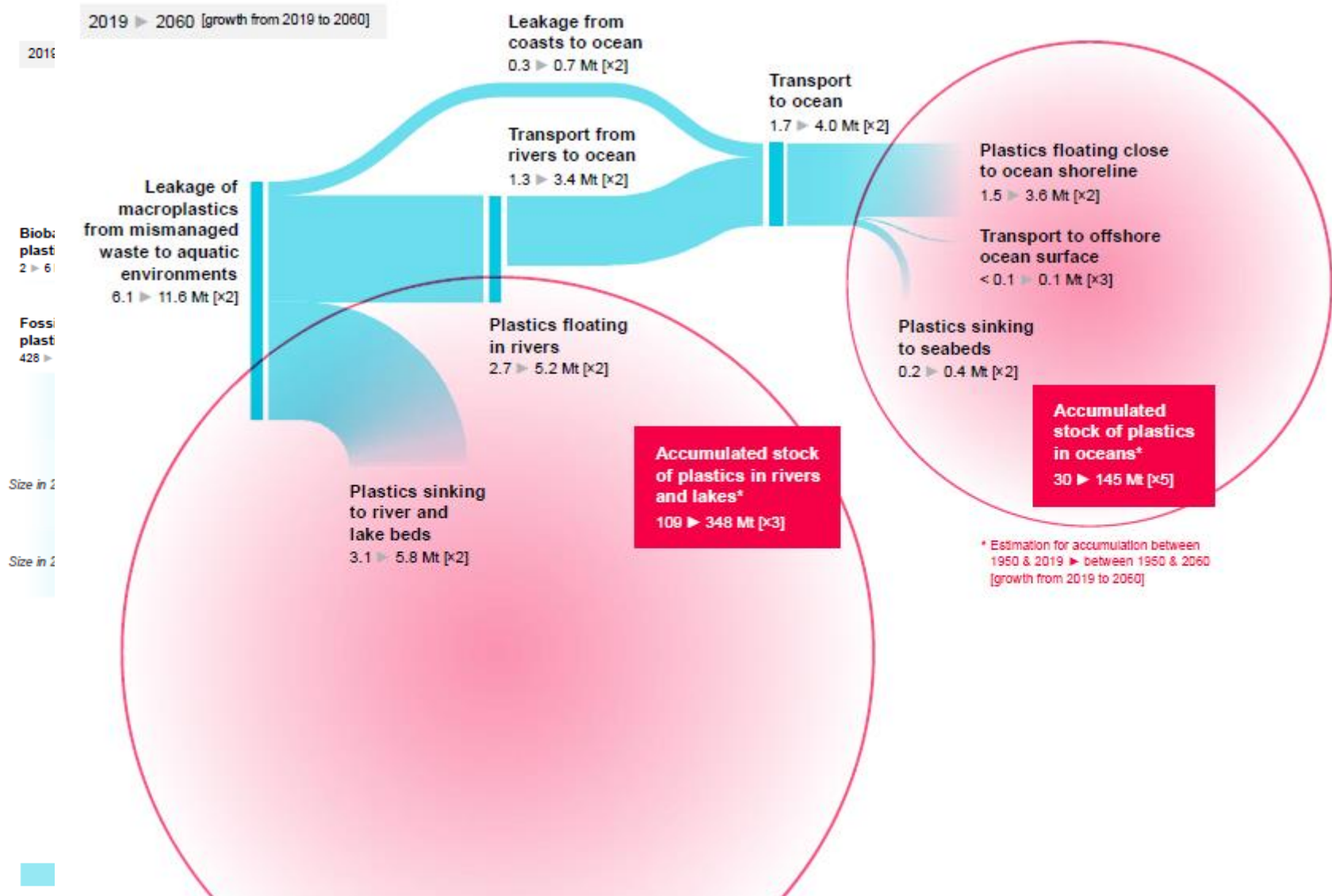


Global Plastics Outlook
POLICY SCENARIOS TO 2060





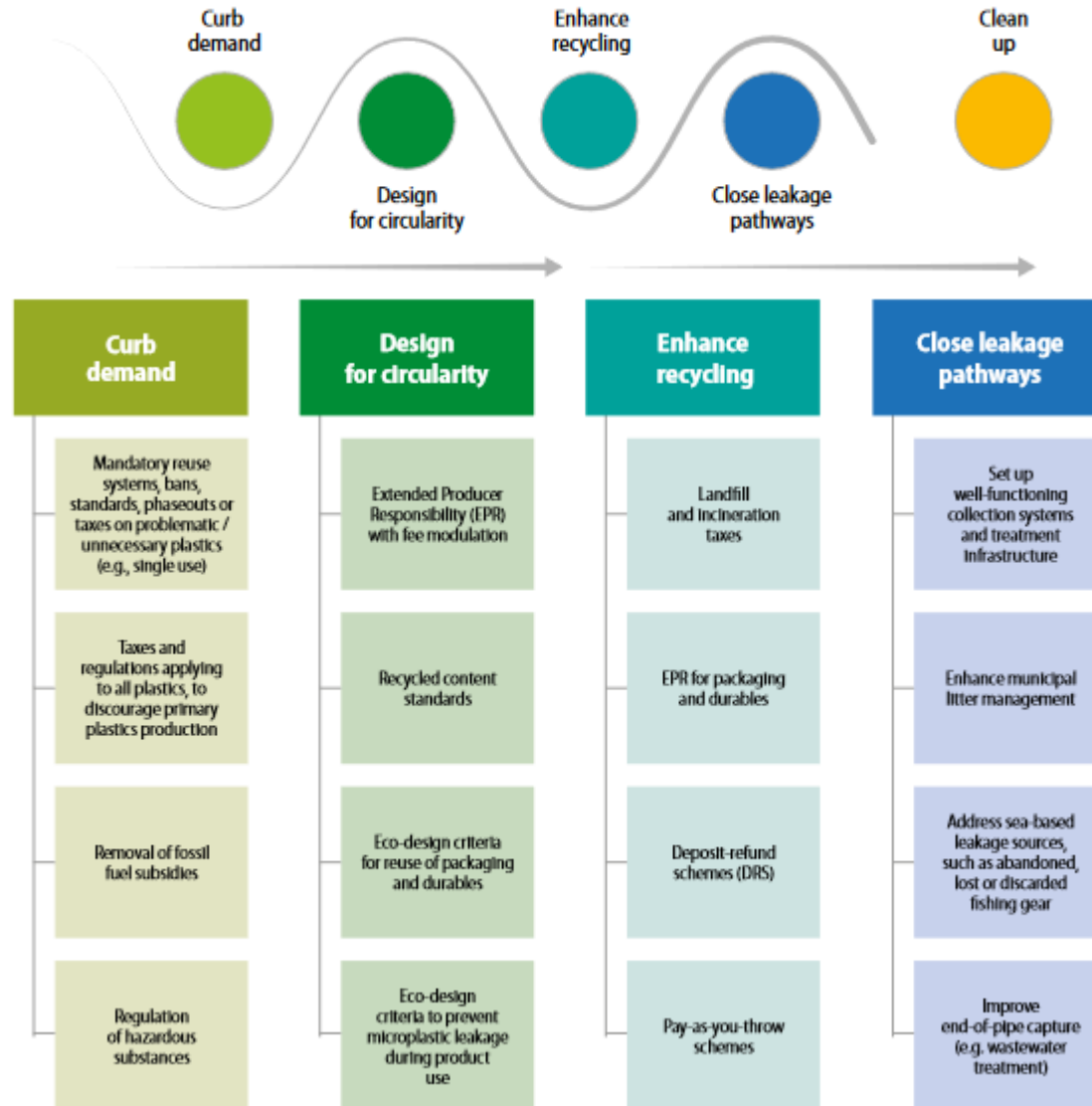
Modelling the lifecycle of plastics to estimate plastic leakage to the environment





Policy levers to influence the lifecycle of plastics

Policy levers



A variety of policy instruments are available to facilitate the transition towards more sustainable plastics use



Plastic pollution has become a policy priority in the APT region

- APT national plastics action plans generally comprise
 - **downstream policies:** plastic waste management and recycling
 - **upstream policies:** bans, reduction plans and fiscal measures.
- General waste management improvements are also being pursued in parallel.
- There are **opportunities for enhanced policy action** given the region's potential for a circular economy transition.





APT waste infrastructure is prone to plastics leaking into the environment

There is significant heterogeneity within ASEAN.

ASEAN and Plus Three Countries differ in their capacities.

An integrated set of waste infrastructure policy interventions is needed to close plastic leakage pathways in the APT.

	Current National Waste Management Infrastructure				
	Waste Collection		End-of-Life Fates		
	MSW Collection	Non-MSW Collection	Plastics Recycling	Waste Incineration	Sanitary Landfill
Brunei	●	○	●	●	●
Cambodia	●	●	●	●	●
Indonesia	○	○	○	●	●
Lao PDR	●	●	●	●	●
Malaysia	●	●	○	●	●
Myanmar	○	○	●	●	●
Philippines	○	○	○	●	●
Singapore	●	●	●	●	●
Thailand	●	○	○	○	○
Viet Nam	●	○	○	●	●
▲ ASEAN Countries					
▼ 'Plus Three' Nations					
China	●	●	●	●	●
◇ Japan	●	●	●	●	●
◇ Korea	●	●	●	●	●

Legend

● System is advanced

● System can be improved

○ System can be markedly improved

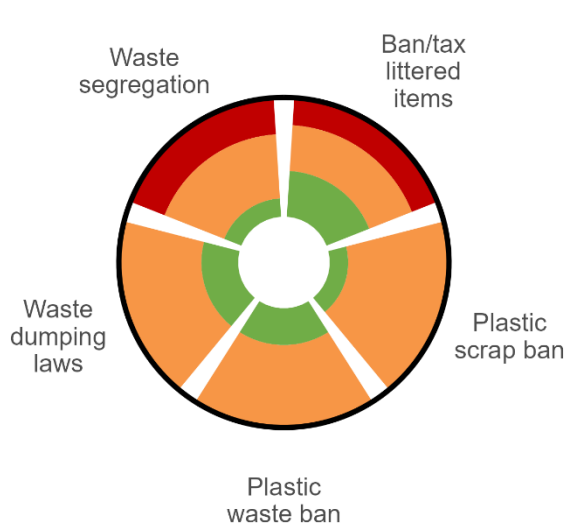
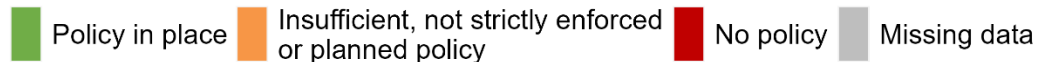
● System is in infancy or non-existent

◇: OECD country

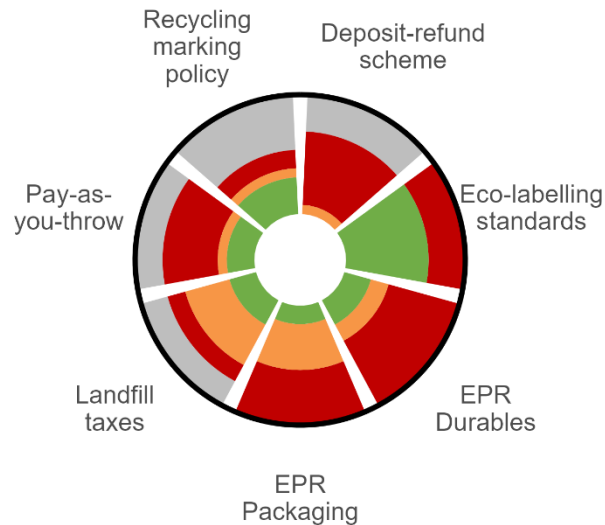


Opportunities for enhanced policy action remain

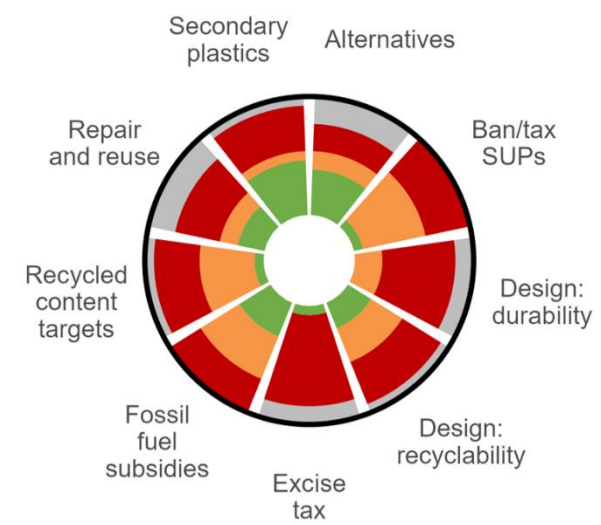
Number of APT countries per policy and status



Policies aimed at **closing plastic leakage pathways** can be more strictly enforced.



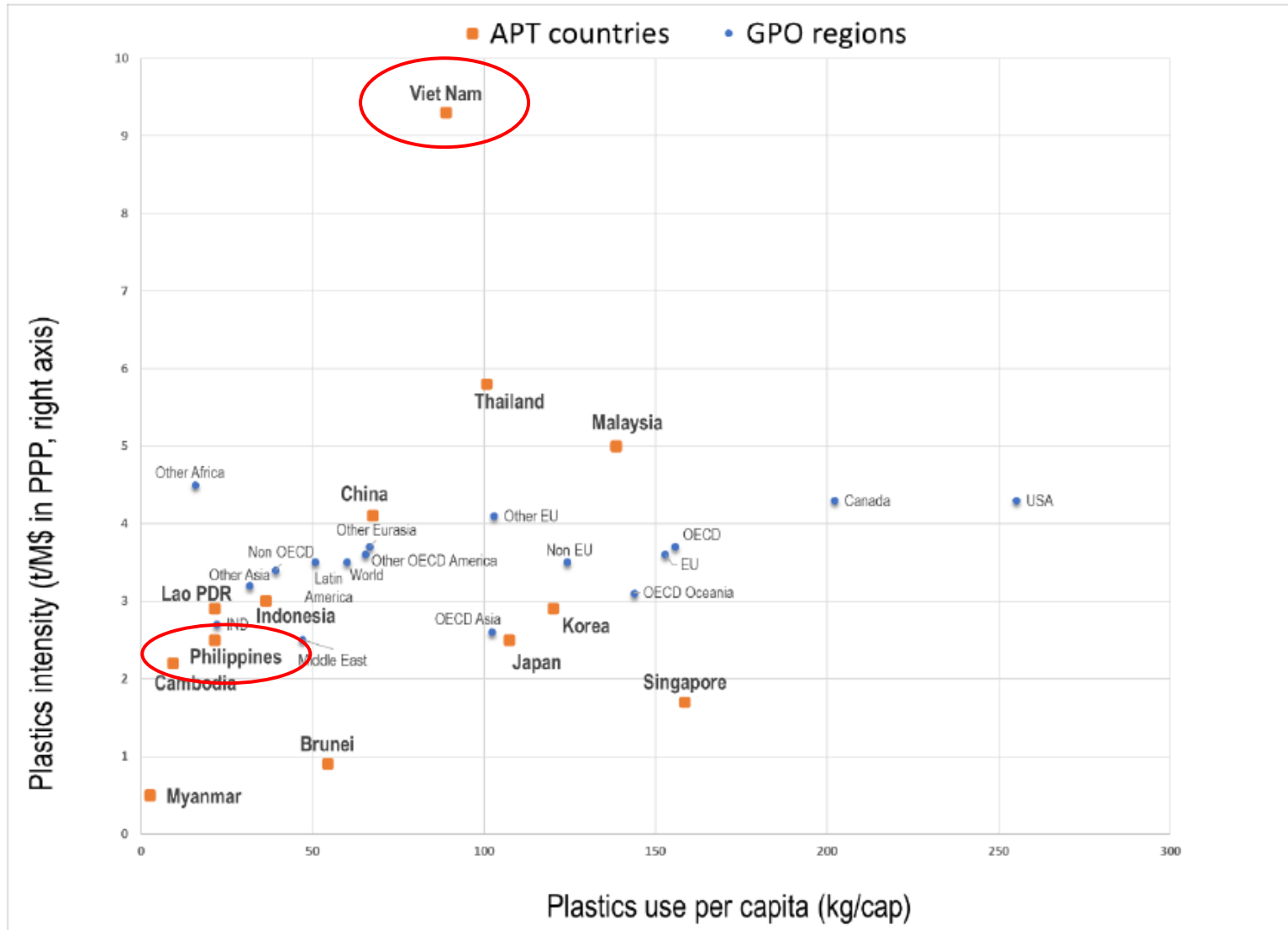
Policies aimed at **incentivising recycling & sorting at source** are in the early stages.



Policies aimed at **restraining plastic demand & design for circularity** are diverse and vary in stringency.



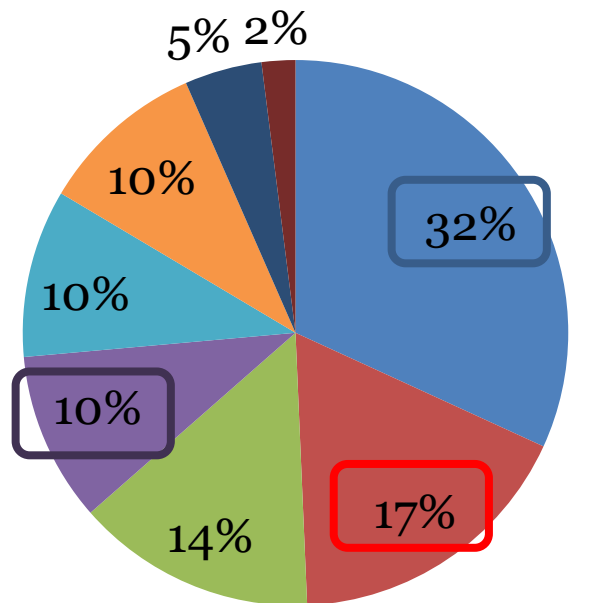
Plastic indicators are very heterogenous across APT countries



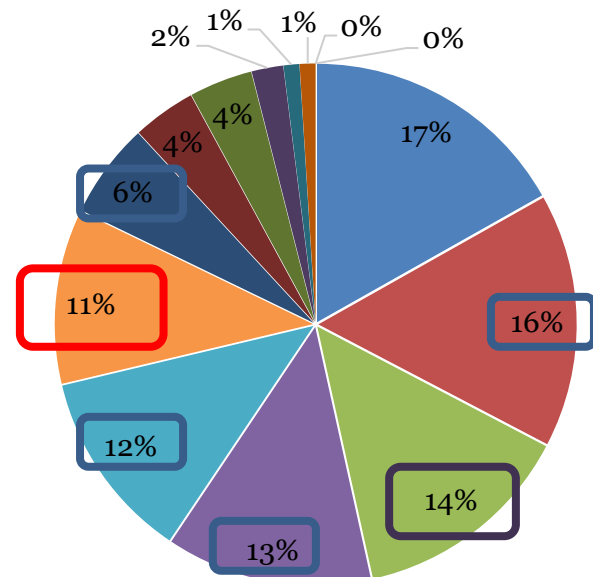


APT plastic use has almost quadrupled since 1990 reaching 149Mt in 2019

Share of plastics use by applications in 2019



Share of plastics use by polymer in 2019



Packaging

Other

Transportation

Electronics & machinery

Construction

Textiles

Consumer products

Tyres

Other

HDPE

PET

ABS

Road marking coatings

PP

LLDPE

PS

Elastomers (tyres)

Marine coatings

Fibers

PVC

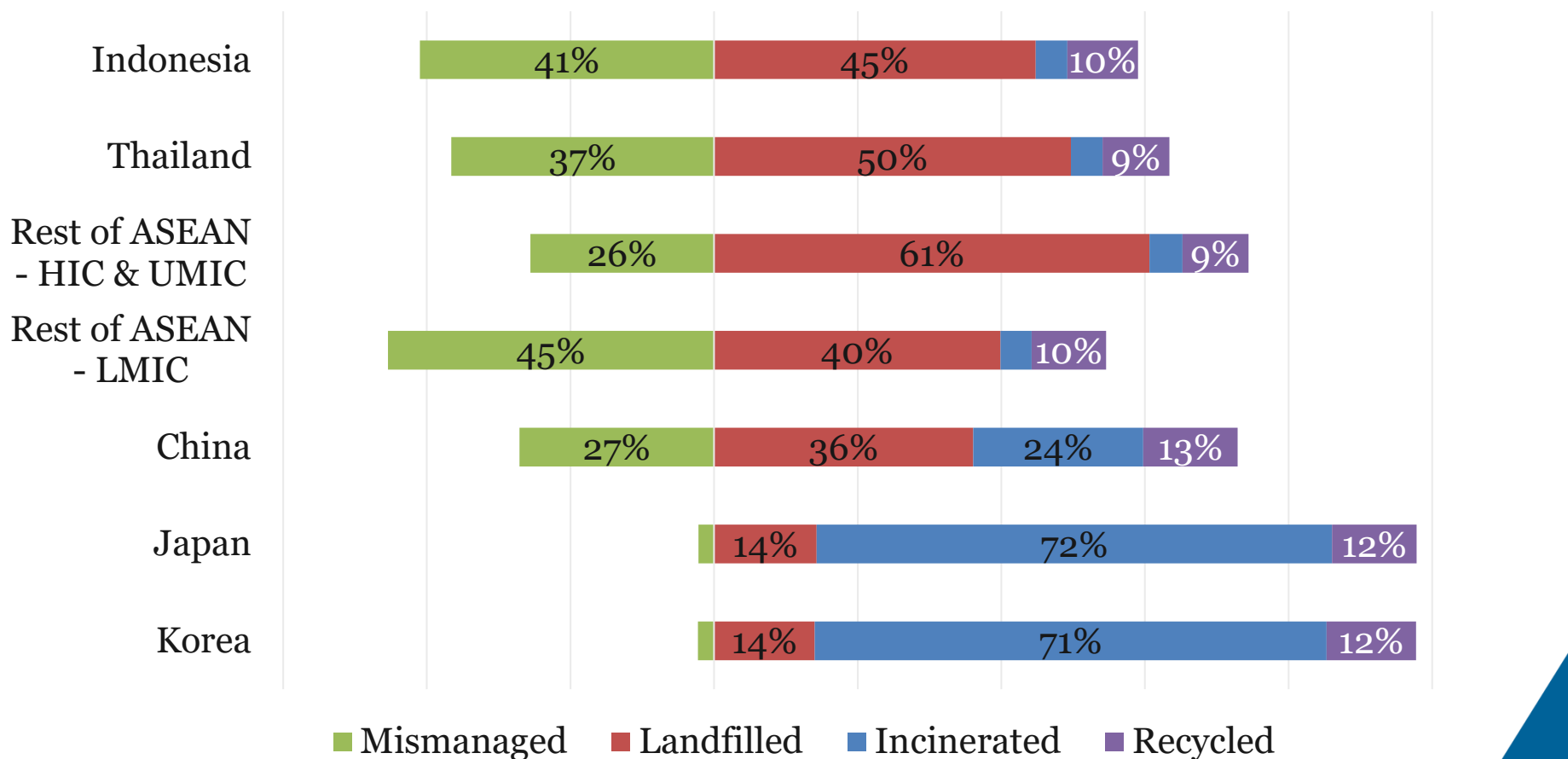
PUR

Bioplastics



Mismanaged plastic waste (26%) remains larger than recycled plastics (12%)

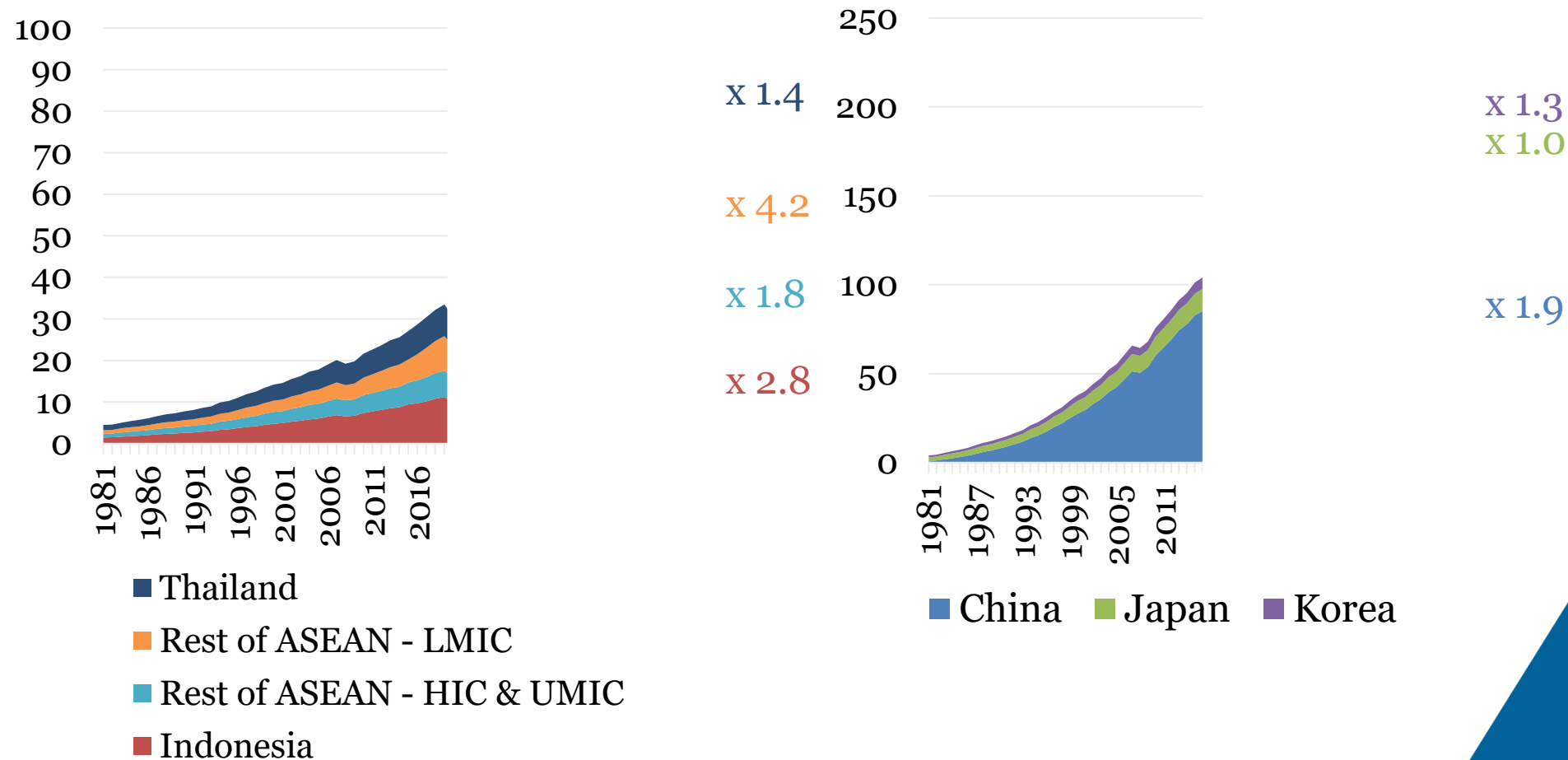
Share of end-of-life fates in 2019





Plastics use will grow heterogeneously within APT

Plastics use projections in Mt



Thank you!

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<https://oe.cd/plastics>