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

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Outline

1. About project: Project objectives and components
2. Challenges faced by ASEAN countries
3. Regional policy trend
4. Current approaches taken in the region
5. Initial Findings
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 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
- 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)

  29th 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 20th Meeting of AWGCME)

# 4. 3R policies for plastics in ASEAN countries

<table>
<thead>
<tr>
<th>Country</th>
<th>Strategy</th>
<th>Ban of single-use plastics</th>
<th>Levy/charge on single-use plastics</th>
<th>Deposit-refund scheme</th>
<th>EPR-based recycling policies</th>
<th>Sorted collection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Singapore</td>
<td></td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Mandatory reporting requirements for packaging data and packaging waste reduction plans by 2021</td>
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<tr>
<td>Brunei</td>
<td></td>
<td>No</td>
<td>No</td>
<td>No</td>
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<tr>
<td></td>
<td>-National Roadmap for the Development of Bioplastics Industry</td>
<td></td>
<td></td>
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<td>“Zero waste project” at community level</td>
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<tr>
<td></td>
<td>-Establishment of National Taskforce for Plastic Waste Management</td>
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<tbody>
<tr>
<td>Philippines</td>
<td>No</td>
<td>Partial/local bans on the use of plastic bags (city level)</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Lao PDR</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Viet Nam</td>
<td>No (National Strategy on ISWM to 2025, vision to 2050)</td>
<td>Levy on non-biodegradable plastics</td>
<td>Not yet applied</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Myanmar</td>
<td>No</td>
<td>Partial ban on thin plastics (Yangon Mandalay, Nay Pyi Taw)</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Cambodia</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Sub-decree on plastic waste management</td>
</tr>
</tbody>
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### 4. Continued

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

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<td>Local bans on the use of plastic bags</td>
<td>Manila Bay Clean Up</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Lao PDR</td>
<td>Community solid waste management project</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Viet Nam</td>
<td>Program on control of waste from plastic bags</td>
<td>Not specifically mentioned (Law on Marine and Island Natural Resources and Environment)</td>
<td>No</td>
<td>Trade import regulation for quality, Considering tax for import of single-use plastics</td>
</tr>
<tr>
<td>Myanmar</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Considering</td>
</tr>
<tr>
<td>Cambodia</td>
<td>No</td>
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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