

GA Circular



Research & Data Analytics



Strategy & Policy Advisory



Technical Assistance



Stakeholder Engagement





SCALING THE CURVE





Global, regional and local studies and on-ground efforts

THE ROAD THUS FAR

- Building Baselines
- Marine Debris and Plastics-Focused Policy
- Technology
- Informal Sector Inclusion
- Behaviour Change

Building Baselines

Material Flow Analysis

Overview



Value Chain Studies



Leakage Audits



Landfill Audits



Key Insights

01

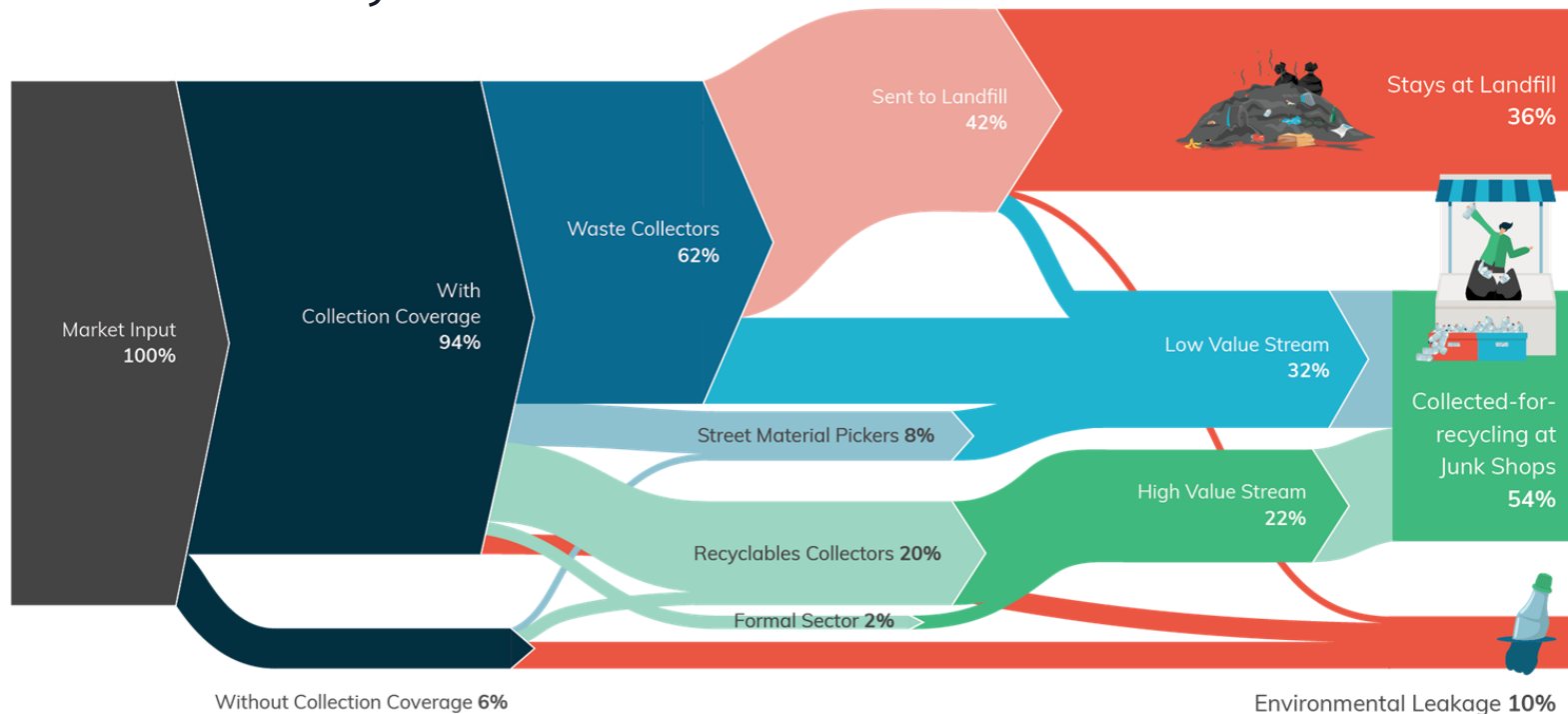
Different materials ->
Different value
chains -> Different
Approaches

02

End markets AND
Value chain activities
influence collection of
plastics

Building Baselines

Material Flow Analyses

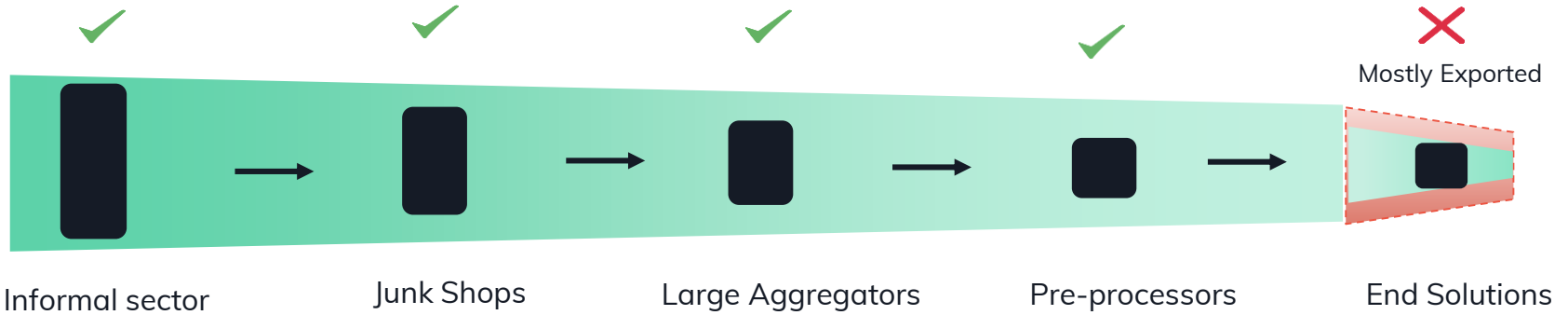


Source: GA Circular Analysis (2017-2019)

Building Baselines

Value Chain Studies - PET

1. Offtake opportunity
2. Existence of unbroken domestic value chain
3. Subject to market challenges and price volatility



Building Baselines

Landfill Audits

TPST Waste



Mixing 400kg of Waste



Quartering



100kg Final Sample



Separation Of Plastic Waste



Plastic Waste Categorisation



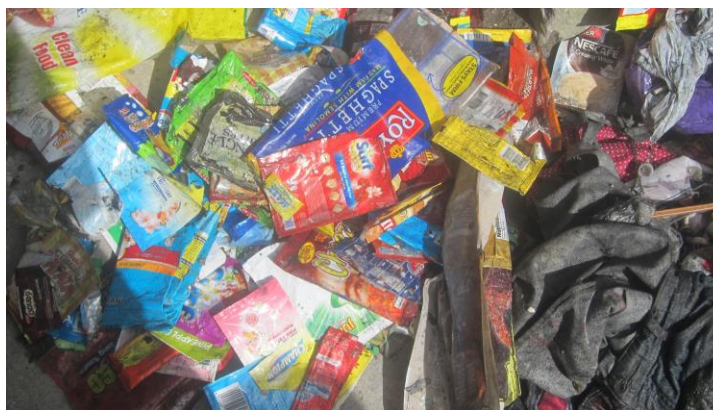
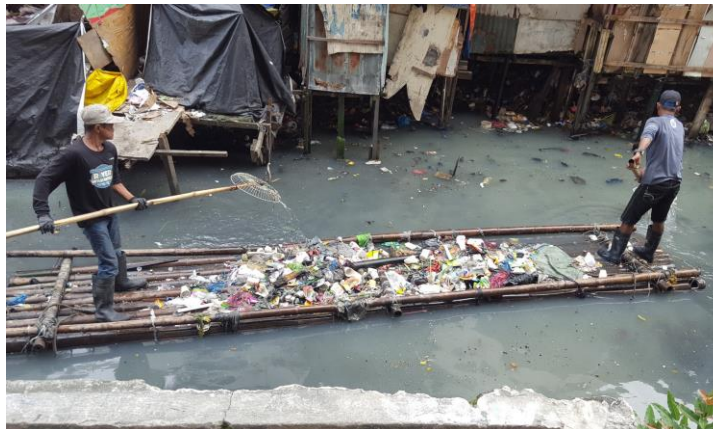


Building Baselines Leakage Audits



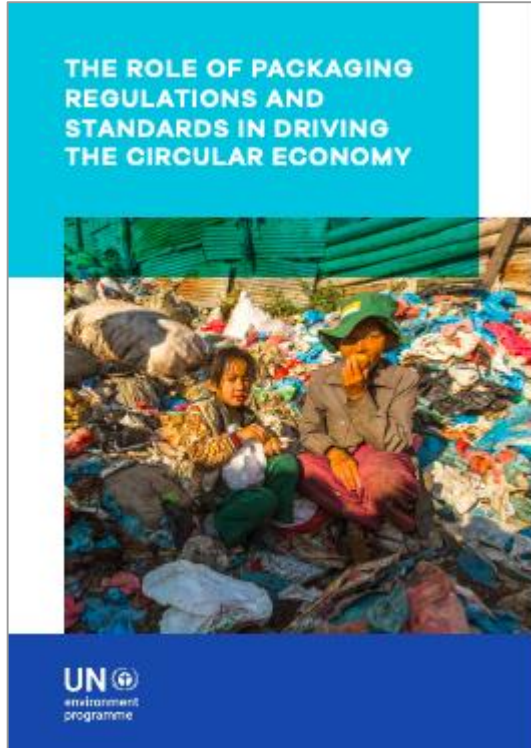
POST-CONSUMER FLEXIBLES IN THE PHILIPPINES:

COLLECTION STRATEGY BASED ON CURRENT WASTE FLOW ANALYSIS & STAKEHOLDER ANALYSIS



Marine Debris & Plastics-Focused Policy

Identifying Policy Frameworks that will Reduce Leakage and Improve Collection for Recycling



Key Policy Focus Areas

01

Marine litter legislation

02

Plastic bans are being contemplated as SUPs are now at the forefront

03

Take-back/ EPR policies
(Indonesia, Malaysia, recycling policies)

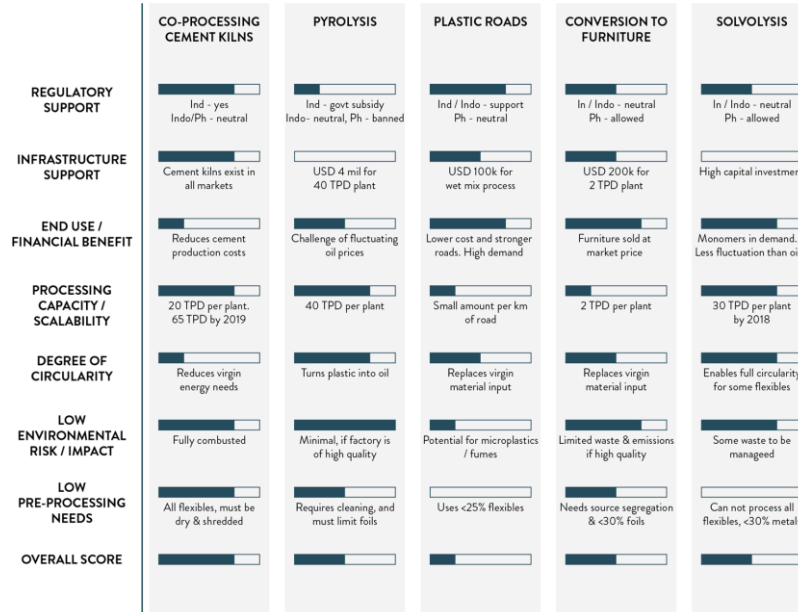
Technology

Evaluating Existing and Potential Technologies



MK Aromatics plant in Chennai

SUMMARY OF PROCESSING TECHNOLOGIES FOR POST-CONSUMER FLEXIBLE PACKAGING IN INDIA, INDONESIA, AND THE PHILIPPINES



Key Insights

01

Must rely on boosting the existing technology even if it's basic

02

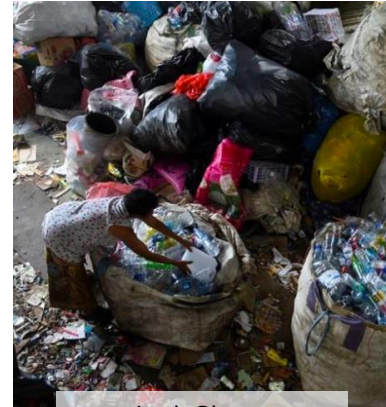
Capacity Building

03

Domestic Offtake is essential

Informal Sector Inclusion

Discovering challenges that are unique to the informal sector



Key Insights

01

They are critical for recycling in ASEAN

02

Gaps in business knowledge and commodity potential

03

Declining participation with development

Behaviour Change

There are three critical behaviours to address:



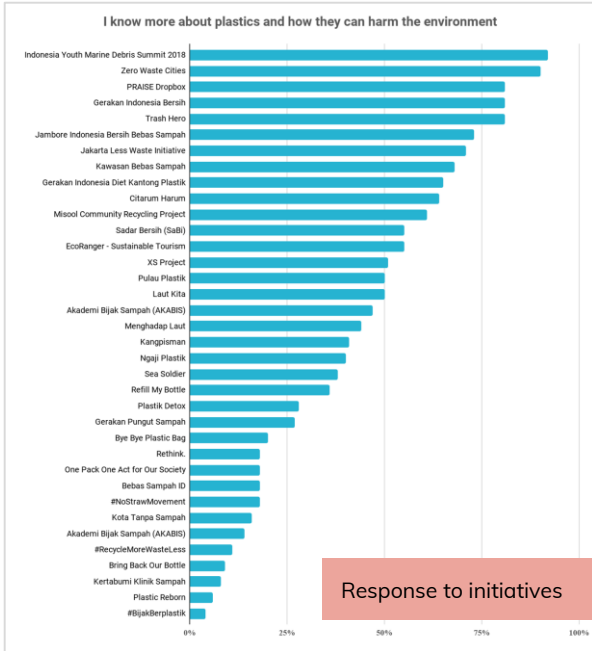
and behaviour change needs to happen throughout the value chain

- Producers/ Consumers/ Stakeholders
- Value-chain participants

Behaviour Change

Behaviour change is critical to all aspects

ASEAN Consumers and the Circular Economy - Understanding attitudes towards waste and Mapping of Existing Initiatives in Indonesia



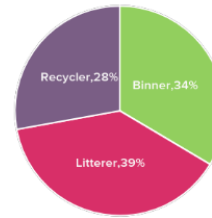
CONSUMERS: OVERVIEW

Nearly 4 in 10 consumers are litterers in Indonesia.

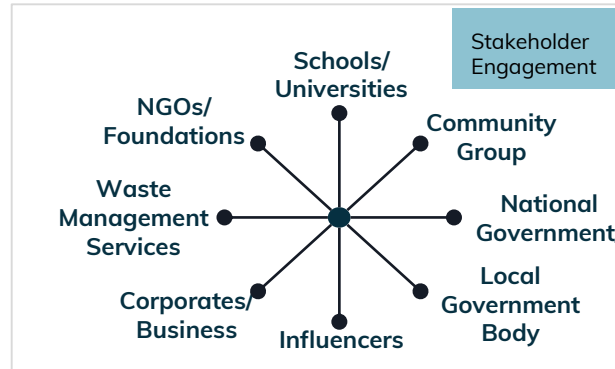
While most (60%) are ignorant about what happens to their waste, there is an opportunity to teach people about the journey of waste. Nearly 1 in 2 people wanted to know more about what happened to their waste after it gets collected.

Do you know what happens to your waste after it gets collected?

	M	F	Avg.
I don't know and I don't care	14%	10%	12%
I don't know but I would like to know more	43%	53%	48%
Yes, I do	43%	37%	40%



Attitudes towards waste



Key Insights

01

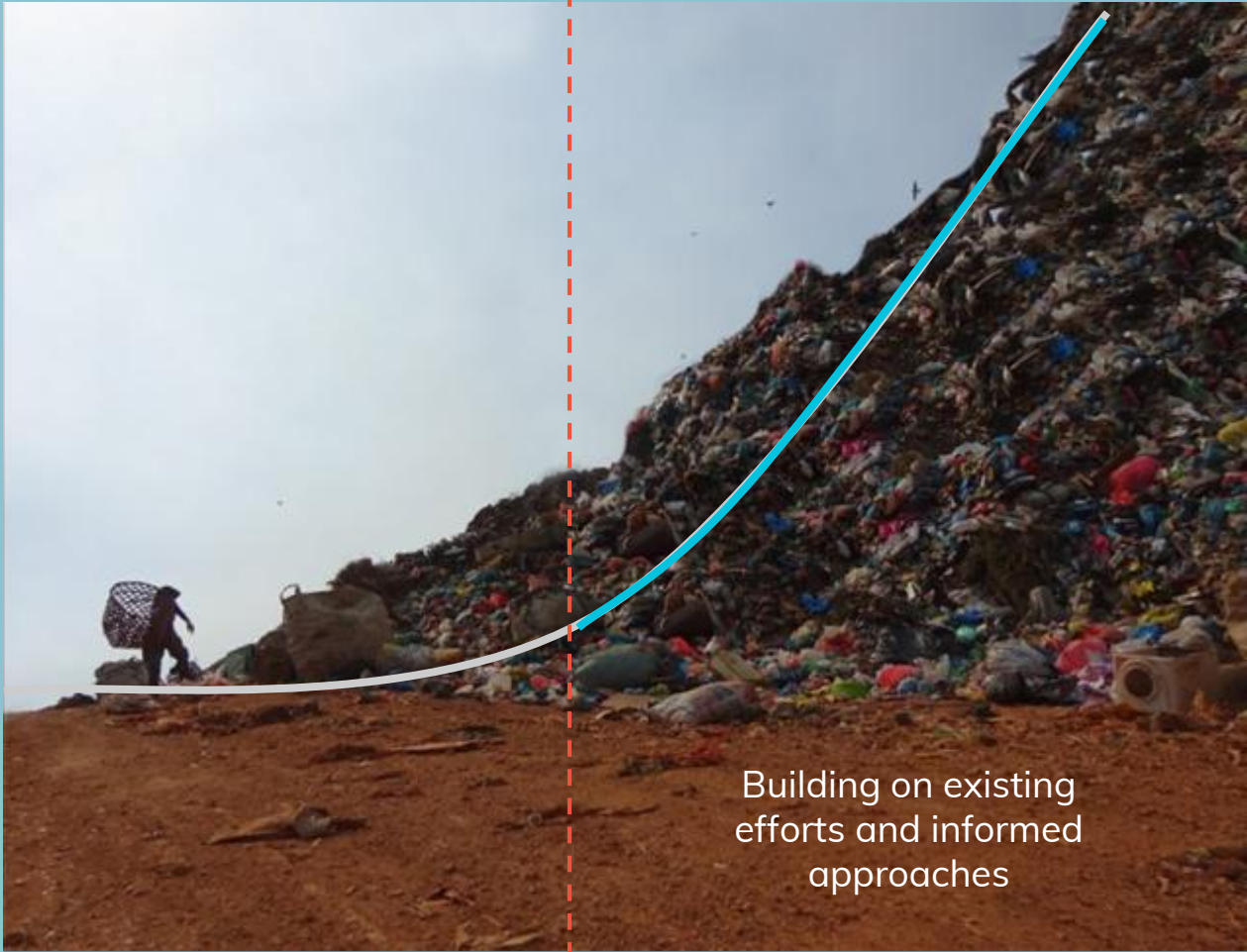
Multi-stakeholder engagement for greater outreach and success

02

Consumer profiling is critical

03

Longer-term and sustained efforts are needed



Building on existing efforts and informed approaches

THE JOURNEY AHEAD

- Industry-led Efforts
- The Role of the Government

Packaging Recovery Organisations (PROs) in ASEAN

Vision and Goals of a Collective Industry-led Effort



Design for circularity



Integrating unbranded products



Improving consumers' disposal behaviour
(source segregation, anti-littering)



Providing policy support with best practices and data



Supporting informal sector
(capacity building and access to social benefits)



Engaging with municipal waste collection
(separate collection)



Supporting recycling industry
(capacity building, technology, offtake agreements)

Packaging Recovery Organisations (PROs) in ASEAN

Countries Committed to an Industry-led Collective Effort



Vietnam

9 Companies
PRO Launched



Malaysia

10 Companies
PRO Business Plan & Roadmap



Indonesia

6 Companies
PRO Business Plan & Roadmap



Thailand

9 Companies
PRO Development



Myanmar

7 Companies
PRO Development

Packaging Design, Behaviour Change Efforts

Industry-led Singular Efforts

Redesigning Packaging



Finding alternatives to plastic packaging



Making products more recyclable/ easy for recycling

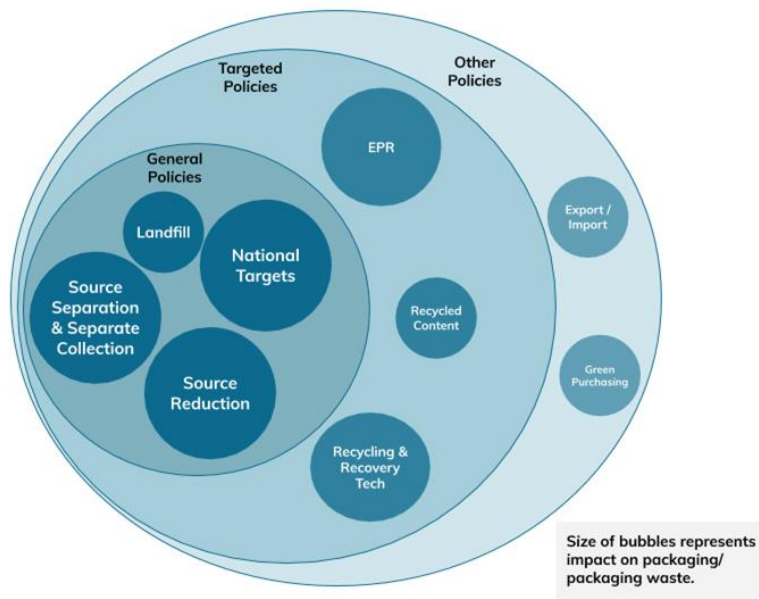
Behaviour Change Campaigns



Policy Efforts

Government-led Efforts

Country Specific Interventions



ASEAN Level interventions

Embracing key principles

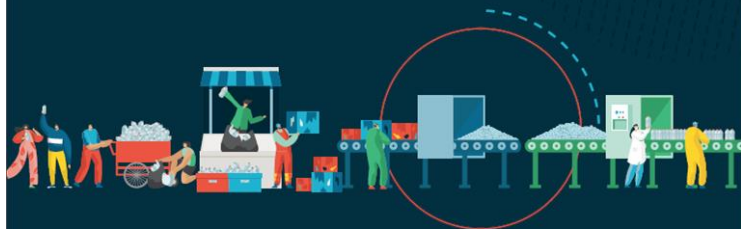
- Prioritization of Source Separation
- Identification of National Targets
- Committing to a Circular Economy/ Life Cycle Approach.

Opportunities for harmonisation

- Reporting of packaging metrics
- Conformity of definitions
- Labelling practices
- Adoption of process and quality standards

Inter-ASEAN trade

- The creation of 'technology hubs'
- Export and import convention



FULL CIRCLE

Accelerating the Circular Economy for Post-Consumer PET Bottles in Southeast Asia

Commissioned by

Coca-Cola

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FULL CIRCLE

Accelerating the Circular Economy for Post-consumer PET bottles in Southeast Asia

Examples of previous insights featured are found in **GA Circular's** most recent report.

Provides a systematic and comparative baseline of the flow of plastics packaging from production to end-states by studying PET bottles in **Southeast Asia: Indonesia, the Philippines, Vietnam, Thailand, Myanmar, and Malaysia.**



Scan to download the report



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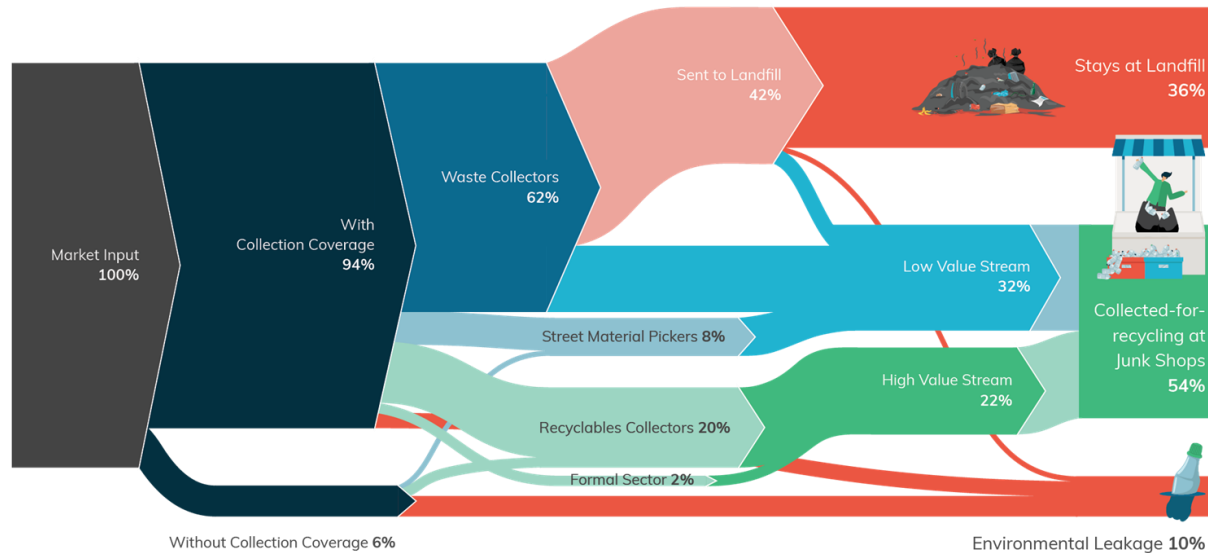


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ACCELERATING THE CIRCULAR ECONOMY

Post-consumer PET bottles in Southeast Asia

Only 54% of bottles sold in the cities studied are collected for recycling.



Source: GA Circular Analysis (2017-2019)



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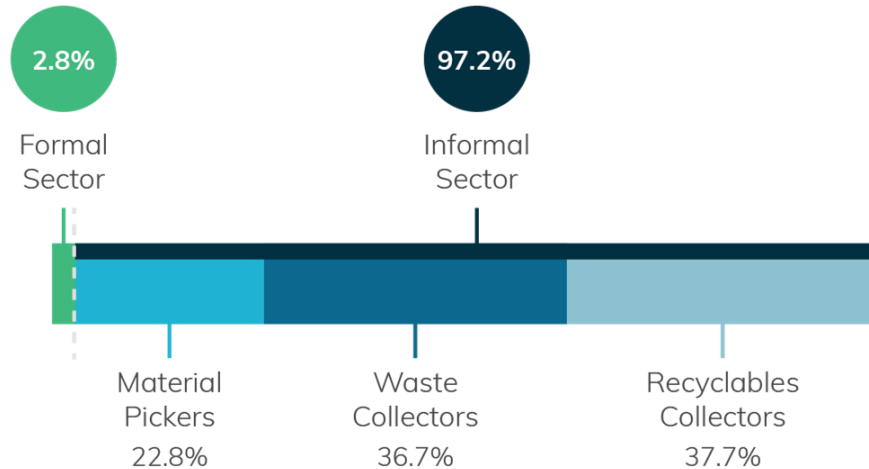


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ACCELERATING THE CIRCULAR ECONOMY

Post-consumer PET bottles in Southeast Asia

The informal sector is responsible for 97% of the PET bottles collected for recycling.



Source: GA Circular Analysis (2017-2019)



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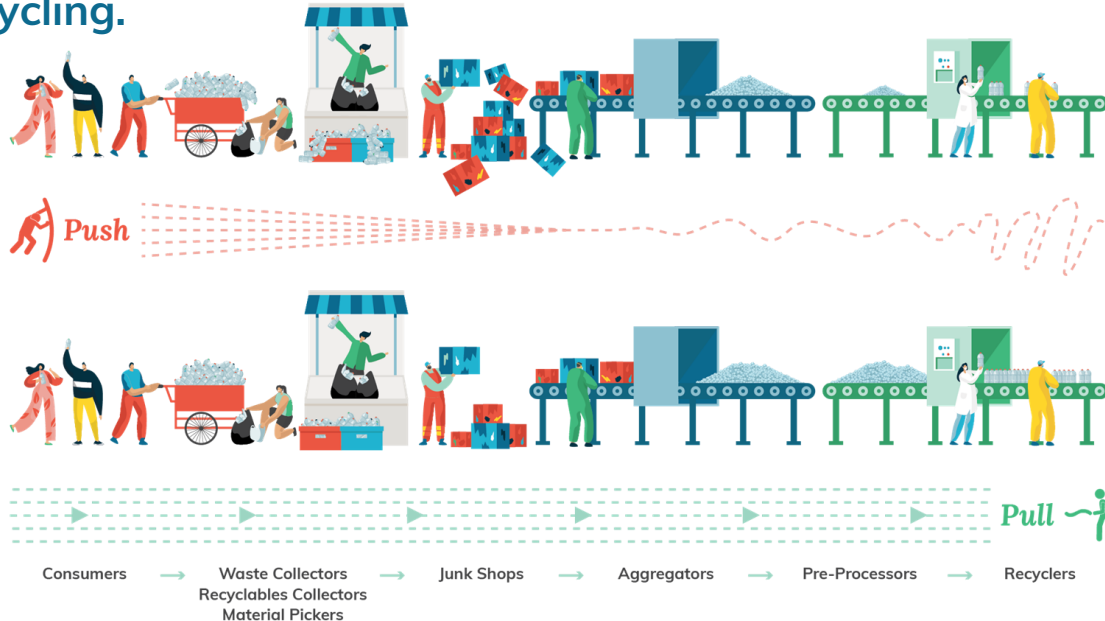


GA Circular

ACCELERATING THE CIRCULAR ECONOMY

Post-consumer PET bottles in Southeast Asia

Pulling material through the value chain using a price incentive is a key strategy to achieve 100% collection for recycling.



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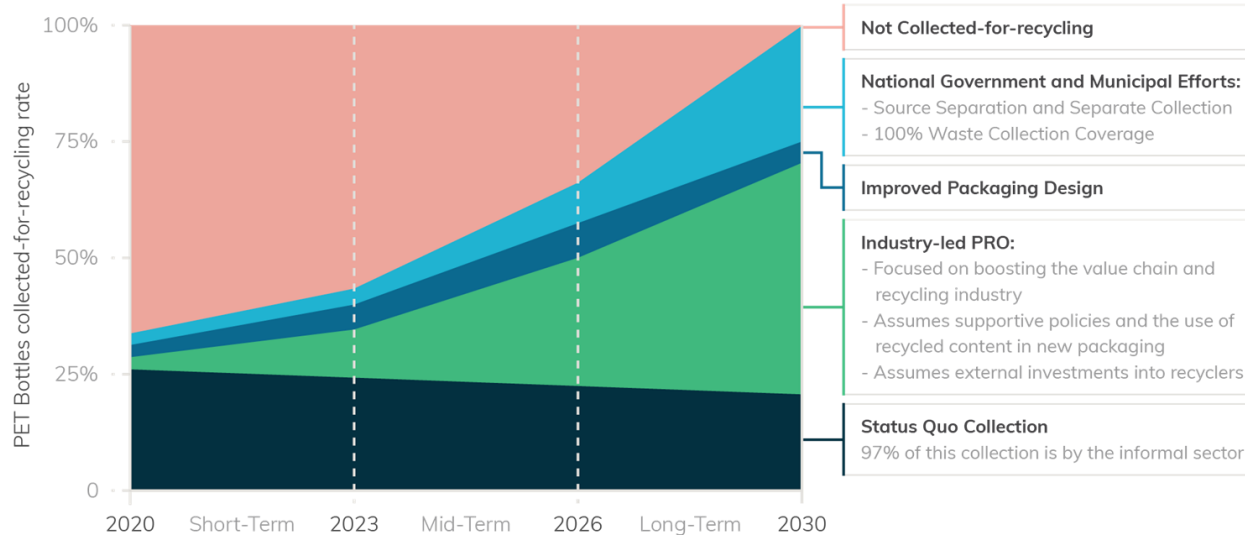


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ACCELERATING THE CIRCULAR ECONOMY

Post-consumer PET bottles in Southeast Asia

Key levers to achieve 100% collection for recycling of PET bottles in Southeast Asia



Source: GA Circular Analysis (2017-2019) based on primary data collection and examples of ECOCE and PETCO



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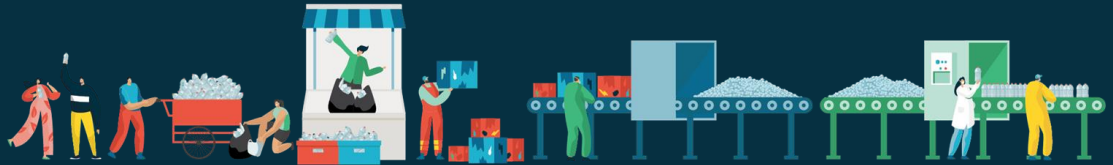


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