Securing a Sustainable Plastics Future for Southeast and East Asia

OECD Regional Plastics Outlook

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WHY AN OUTLOOK ON SOUTHEAST AND EAST ASIA?

FASTEST GROWING REGION

5.3% GDP growth 2023-2024

USD 26.6 trillion in combined GDP
(31% of global share)

Almost one-third of global population

CENTRAL TO GLOBAL PLASTICS LANDSCAPE

Almost one-third of global plastics use and waste

Crucial trade hub in global plastics production, manufacturing, recycling

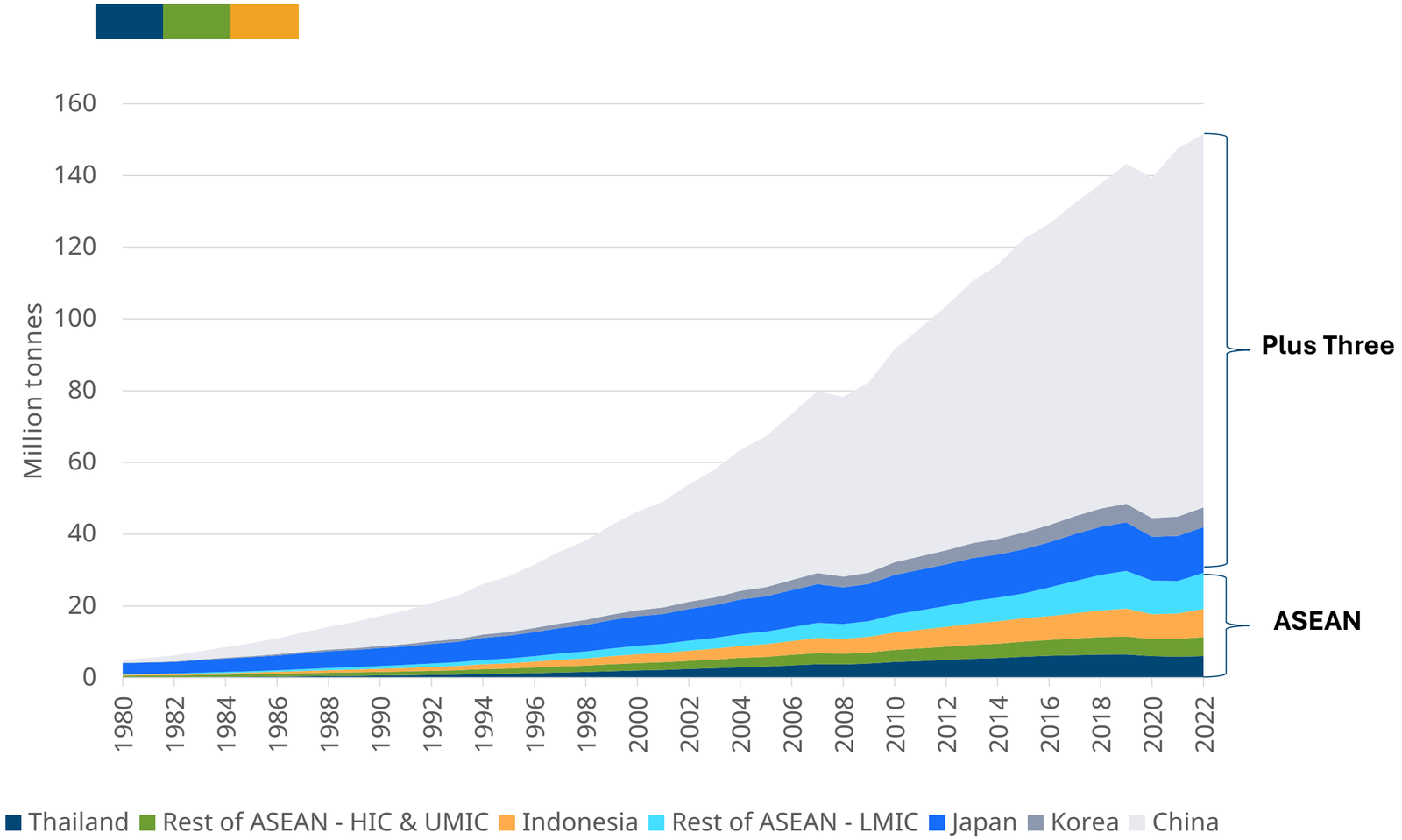
VULNERABLE TO IMPACTS OF PLASTIC POLLUTION

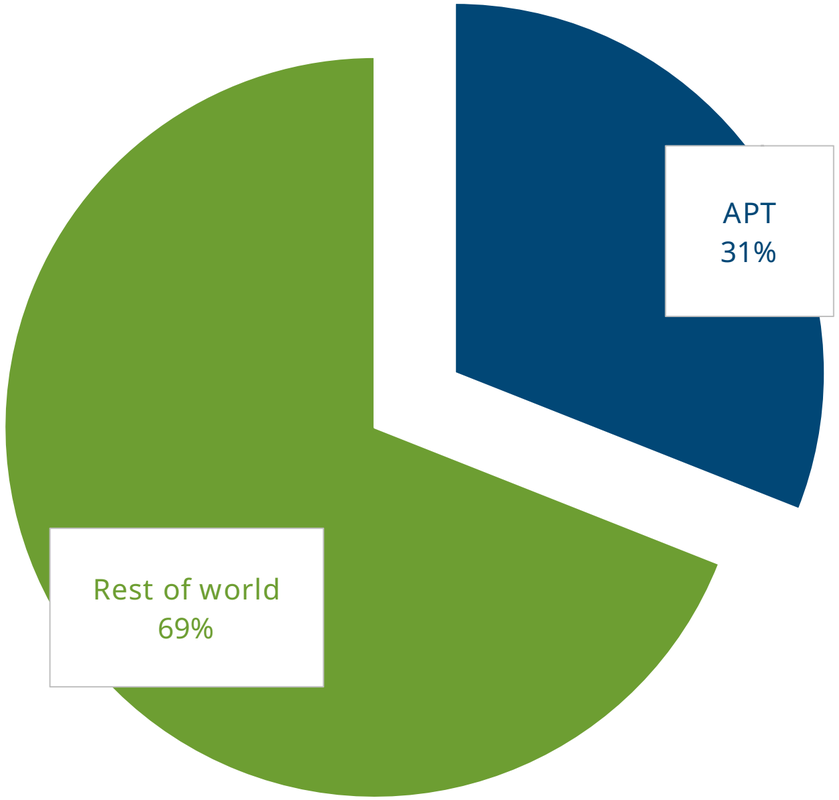
Reliant on ocean economy

Over 150 000 km of coastline, strong risk of plastic leakage

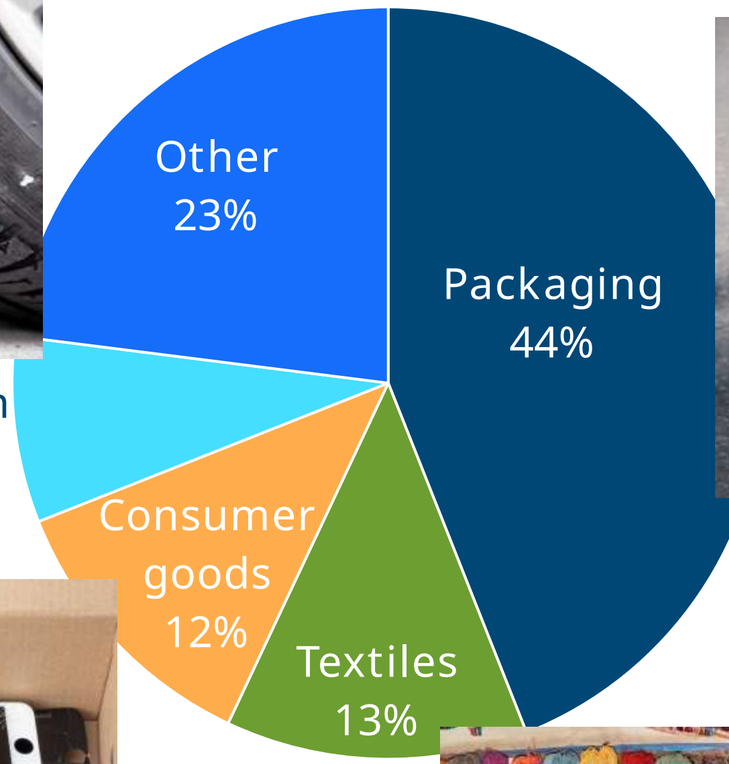
The report focuses on the 10 ASEAN Member States, plus Japan, Korea and the People's Republic of China (ASEAN Plus Three)

PLASTICS USE IN THE REGION HAS SURGED…





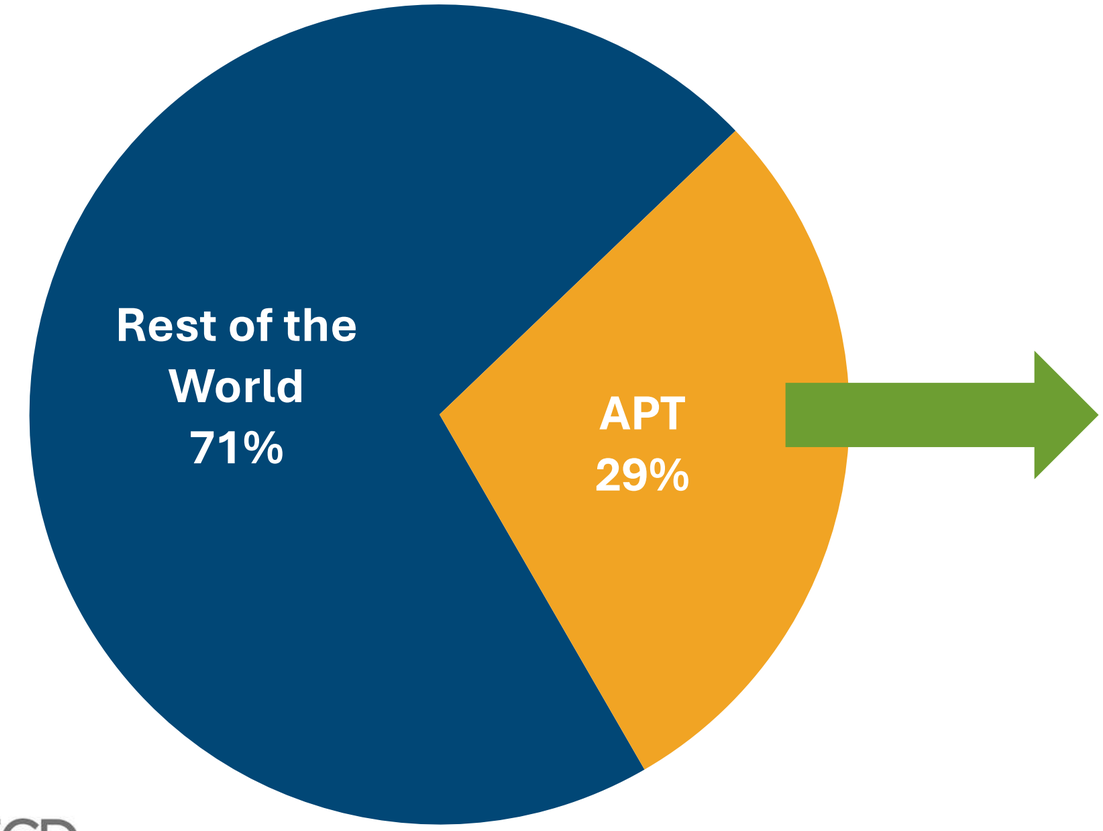
… LEADING TO 113 MT OF WASTE …



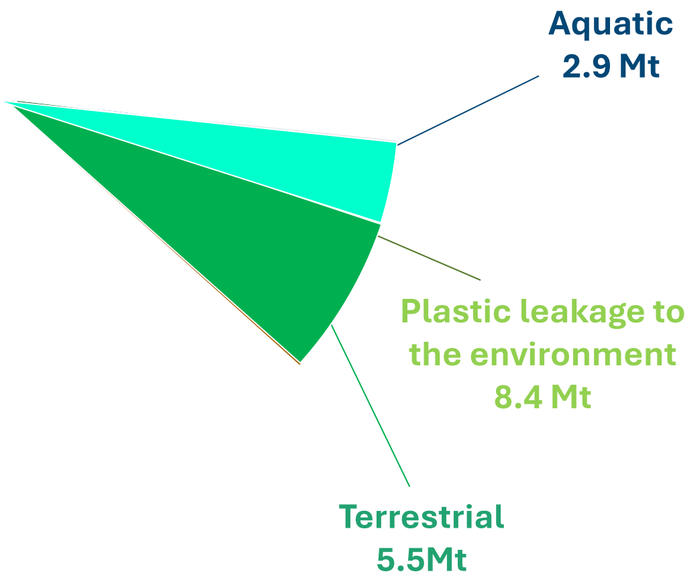
Most plastic waste in the region comes from applications with lifespans of less than five years

…8.4 MILLION TONNES OF PLASTIC WASTE LEAKED INTO THE ENVIRONMENT…

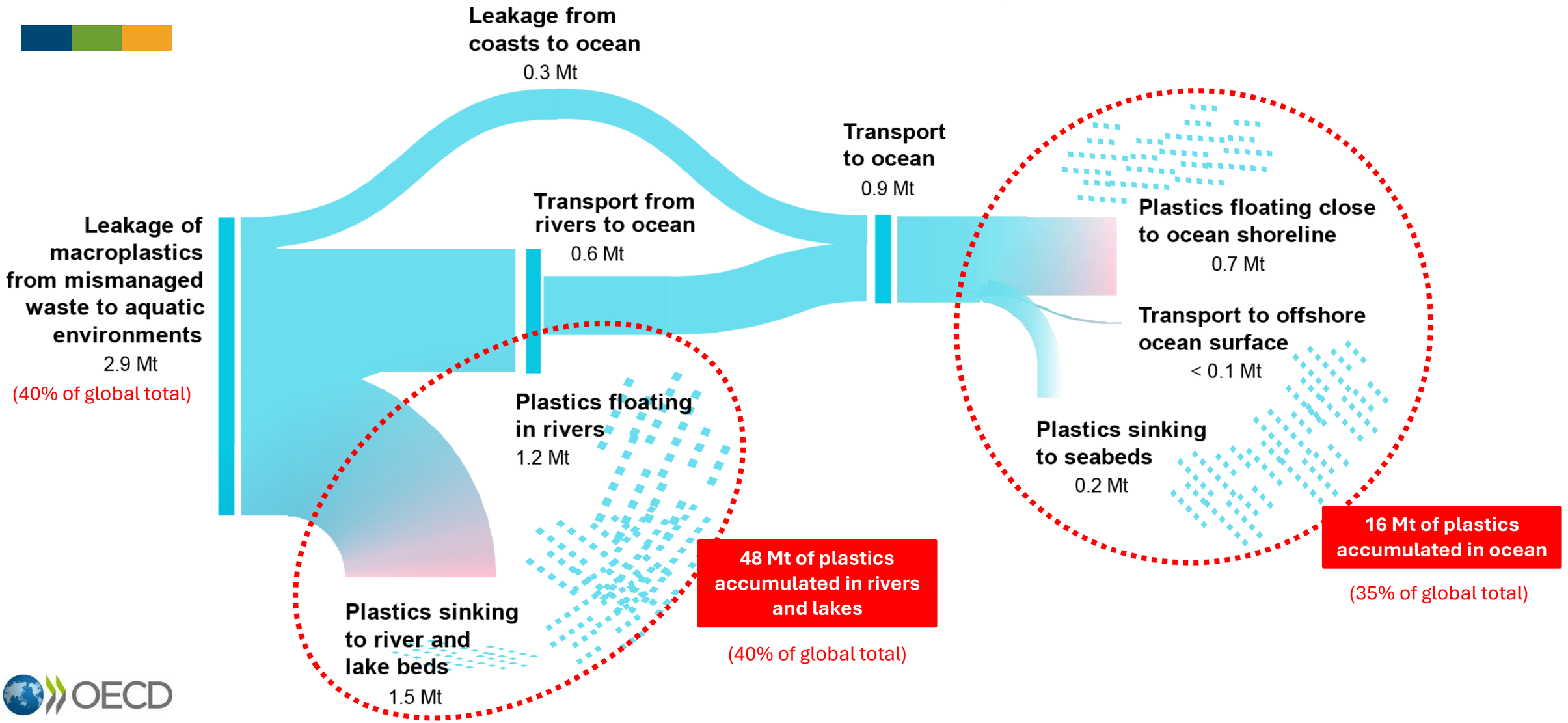
Plastic waste generation



End-of-life fates



… WITH LONG-TERM ENVIRONMENTAL CONSEQUENCES



The region is key in the global fight against plastic pollution

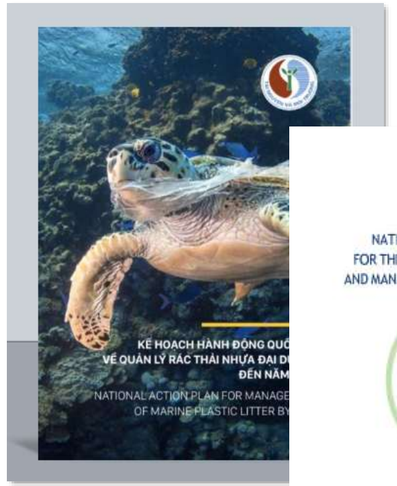
POLICIES TARGETED AT PLASTICS ARE ADVANCING, BUT BUT THERE IS HETEROGENEITY

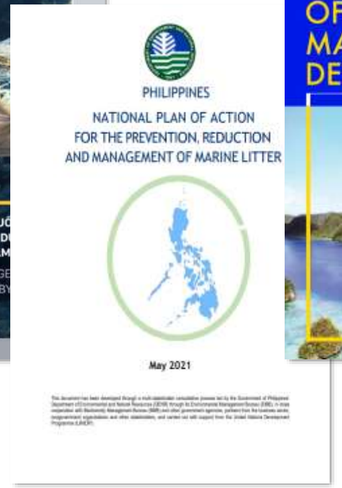
- National action plans in 9 APT countries, generally comprising
  - Waste management and recycling policies
  - Reduction measures

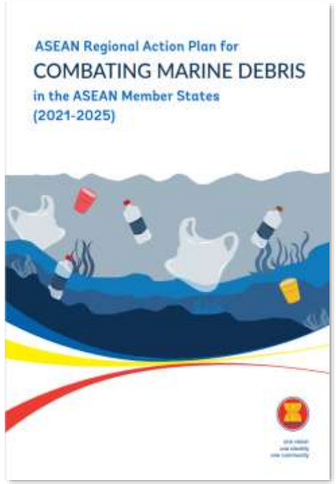
- Growing emphasis on regional co-operation
  - ASEAN Framework of Action on Marine Debris
  - ASEAN Regional Action Plan for Combating Marine Debris
  - ASEAN Plus Three Cooperation Work Plan

- Most APT countries have eco-labelling in place
- Extended Producer Responsibility (EPR) schemes for plastic packaging are gradually deployed
  - Japan and Korea have well-established schemes
  - 4 ASEAN countries (Indonesia, Philippines, Singapore, Viet Nam) at early stages of implementation
- Lack of landfill taxes in most APT countries is a missed opportunity
- 7 countries have (or have planned) bans on some single-use plastics
- Policies to promote design for circularity, reduction, reuse and longer lifespans remain largely untapped

Overall, weak enforcement poses challenges in many APT countries







MODELLING FRAMEWORK

1. Regional and sectoral drivers of plastics use

2. Plastics use

3. Plastic waste generation

4. Environmental impacts from plastics use and waste

	Modelled region	Detail
ASEAN	Thailand	UMIC
	Rest of ASEAN - HIC and UMIC *(high and upper middle-income countries)*	• Brunei Darussalam (HIC) • Malaysia (UMIC) • Singapore (HIC)
	Indonesia	LMIC
	Rest of ASEAN – LMIC *(lower middle-income countries)*	• Cambodia • Lao People's Democratic Republic (Lao PDR) • Philippines • Viet Nam • Myanmar
Plus Three	People's Republic of China (China)	
	Japan	
	Korea	

Note: For the purposes of this modelling exercise, Myanmar is grouped with Timor Leste in the underlying economic data. It was not possible to exclude Timor Leste, but it represents 3% of the size of Myanmar, so the analysis remains valid. The People's Republic of China includes Hong Kong

OUTLOOK TO MID-CENTURY

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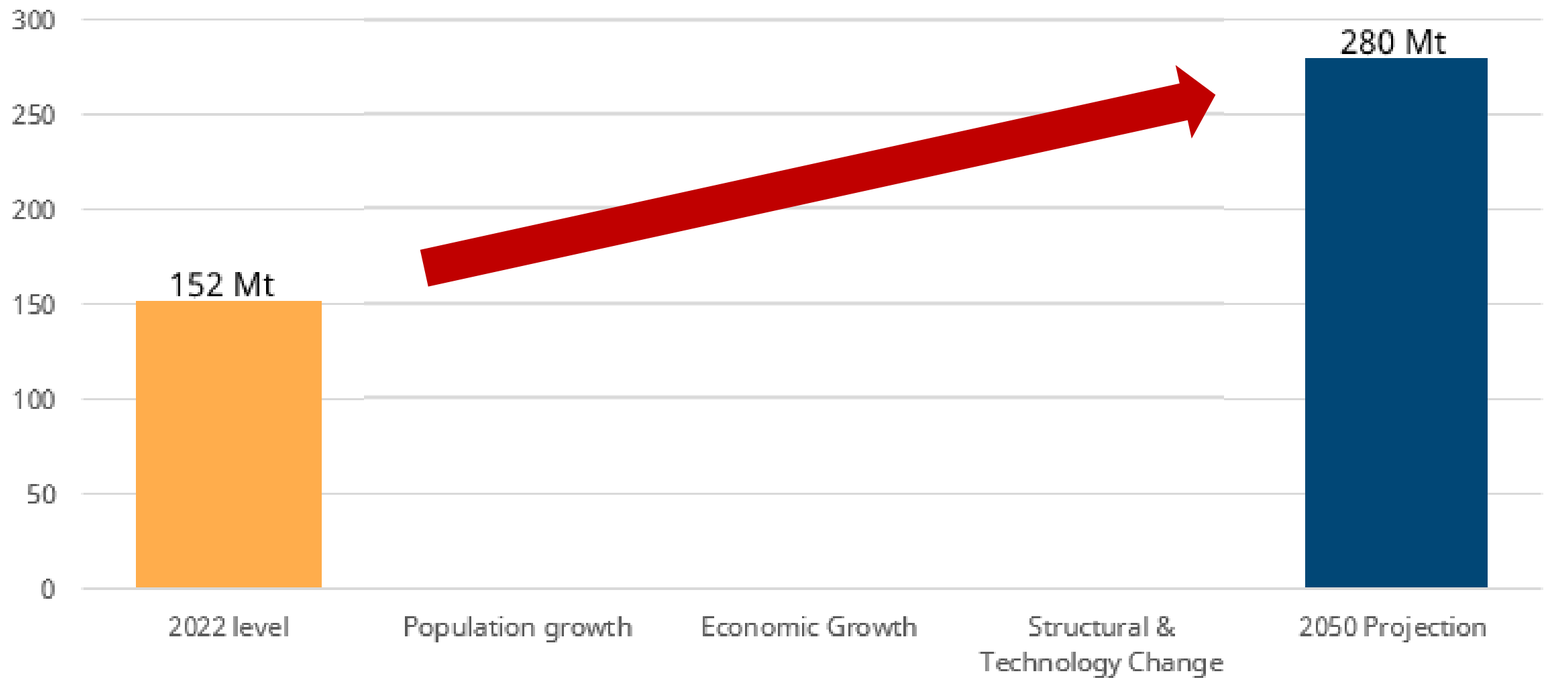
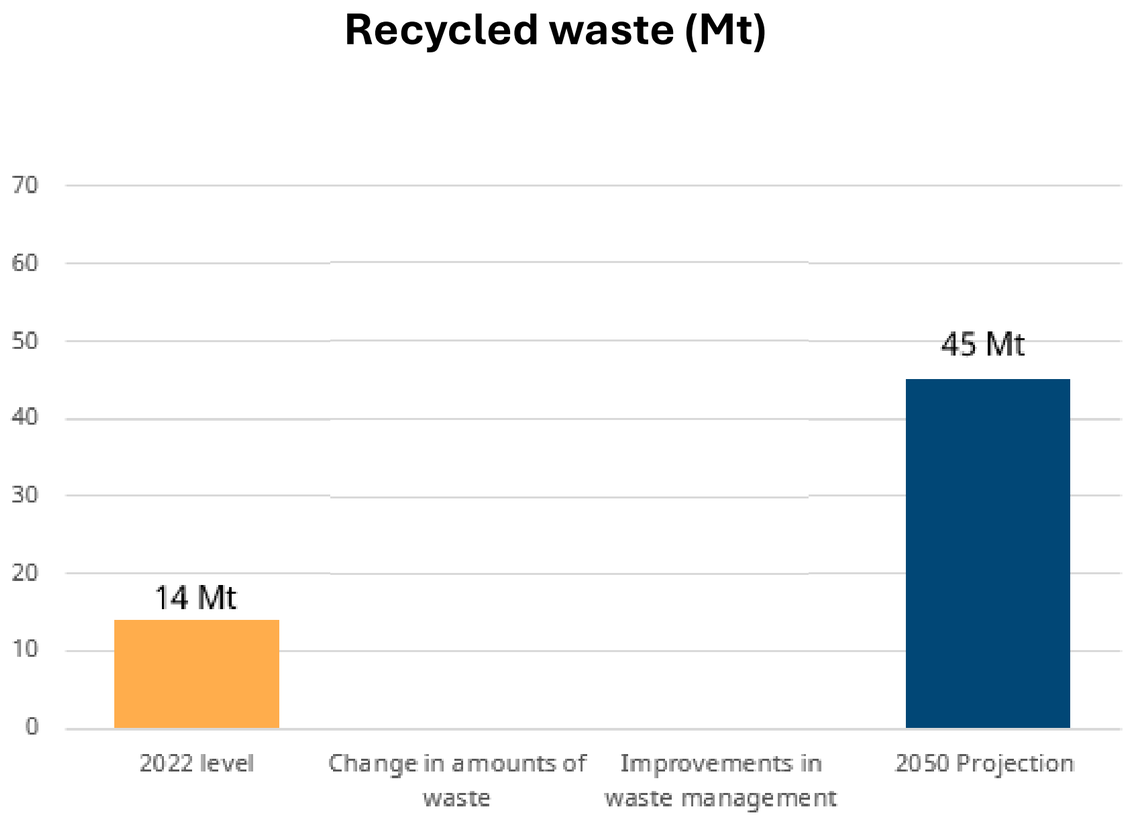
INCREASED PLASTICS USE DRIVEN BY ECONOMIC GROWTH

Plastics use in the region (Mt)

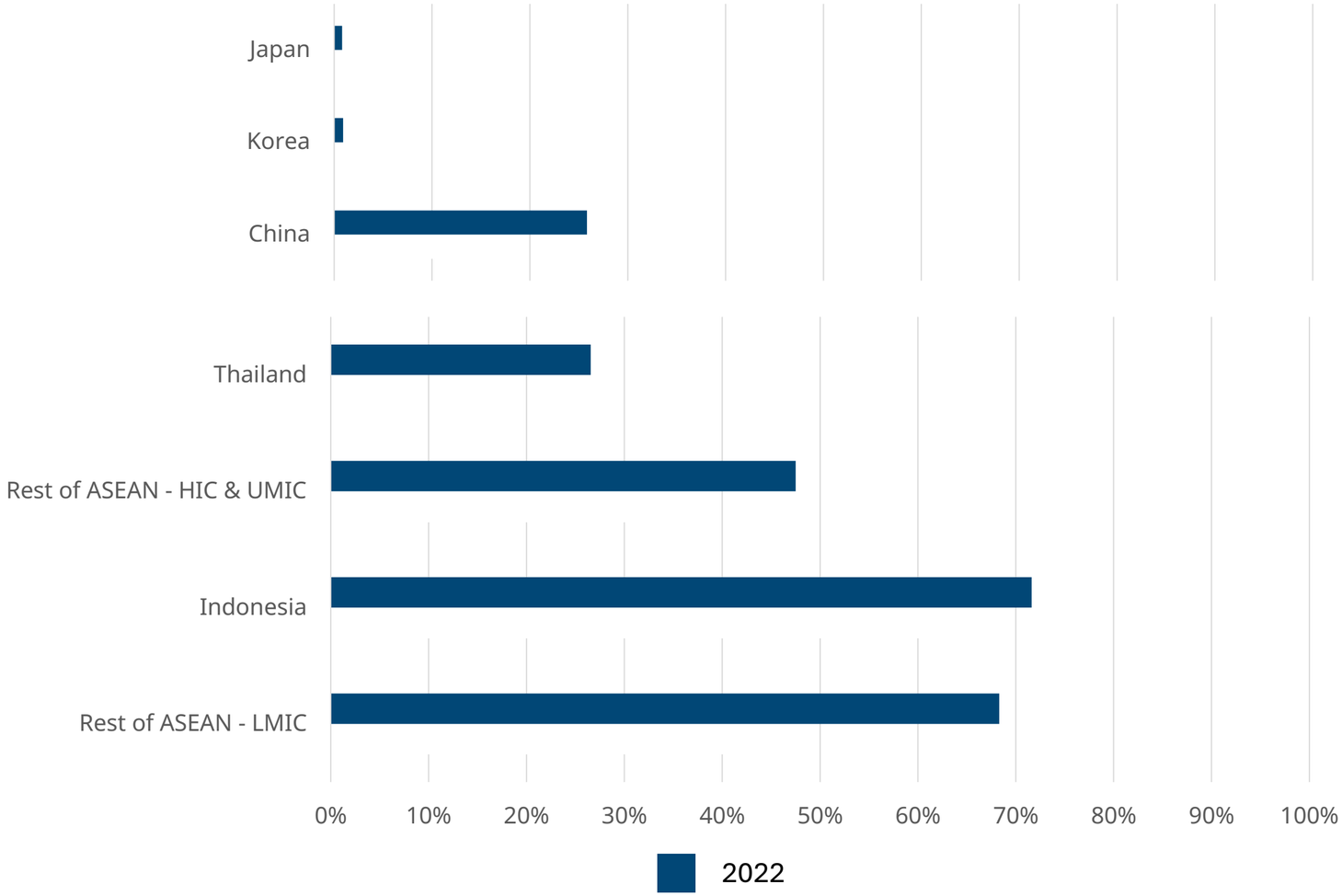


WASTE MANAGEMENT IMPROVES, BUT MISMANAGED WASTE STILL GROWS IN ABSOLUTE TERMS



HETEROGENEITY ACROSS THE REGION PERSISTS BEHIND AGGREGATE IMPROVEMENTS

Share of mismanaged waste (%)



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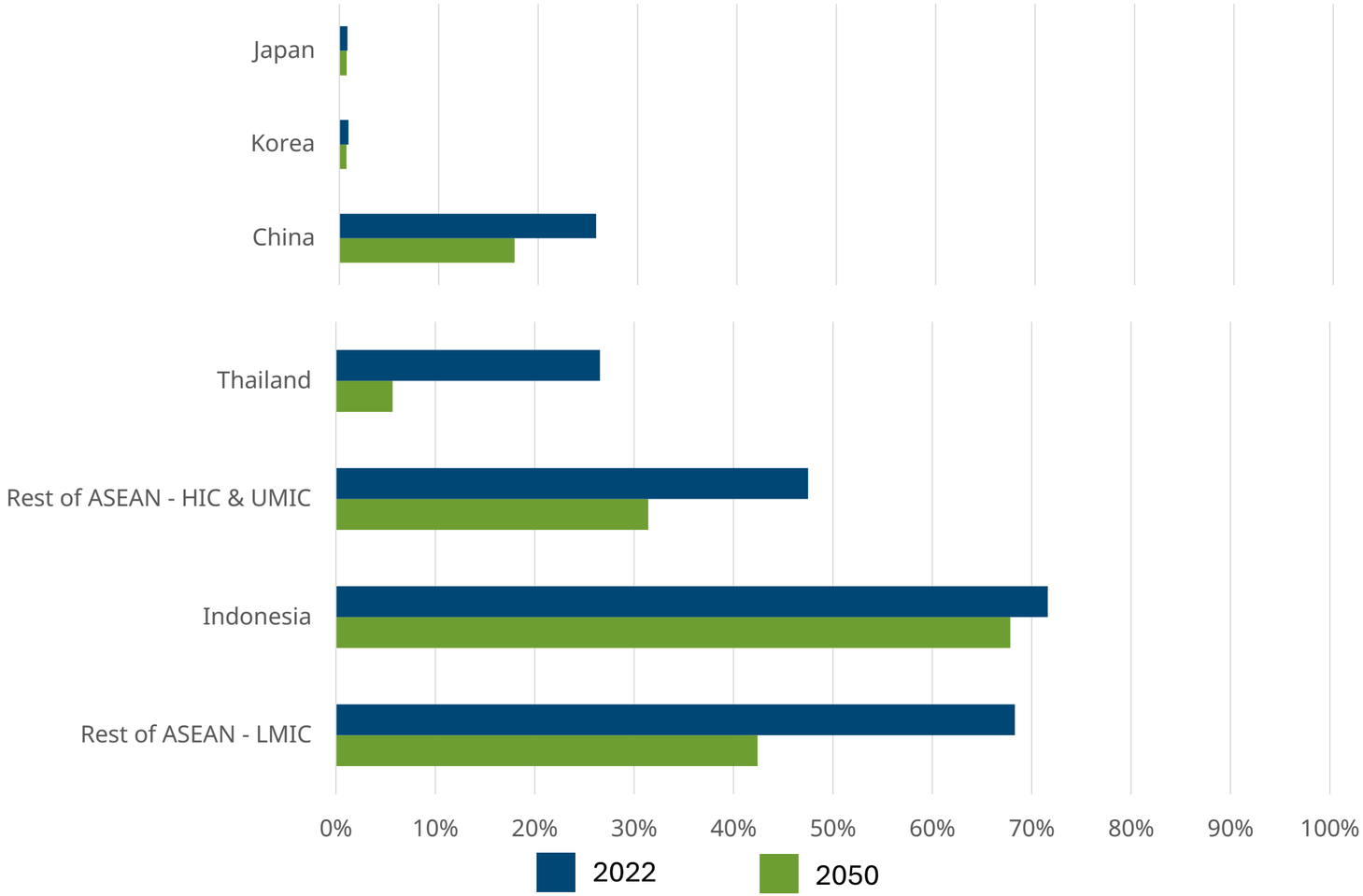
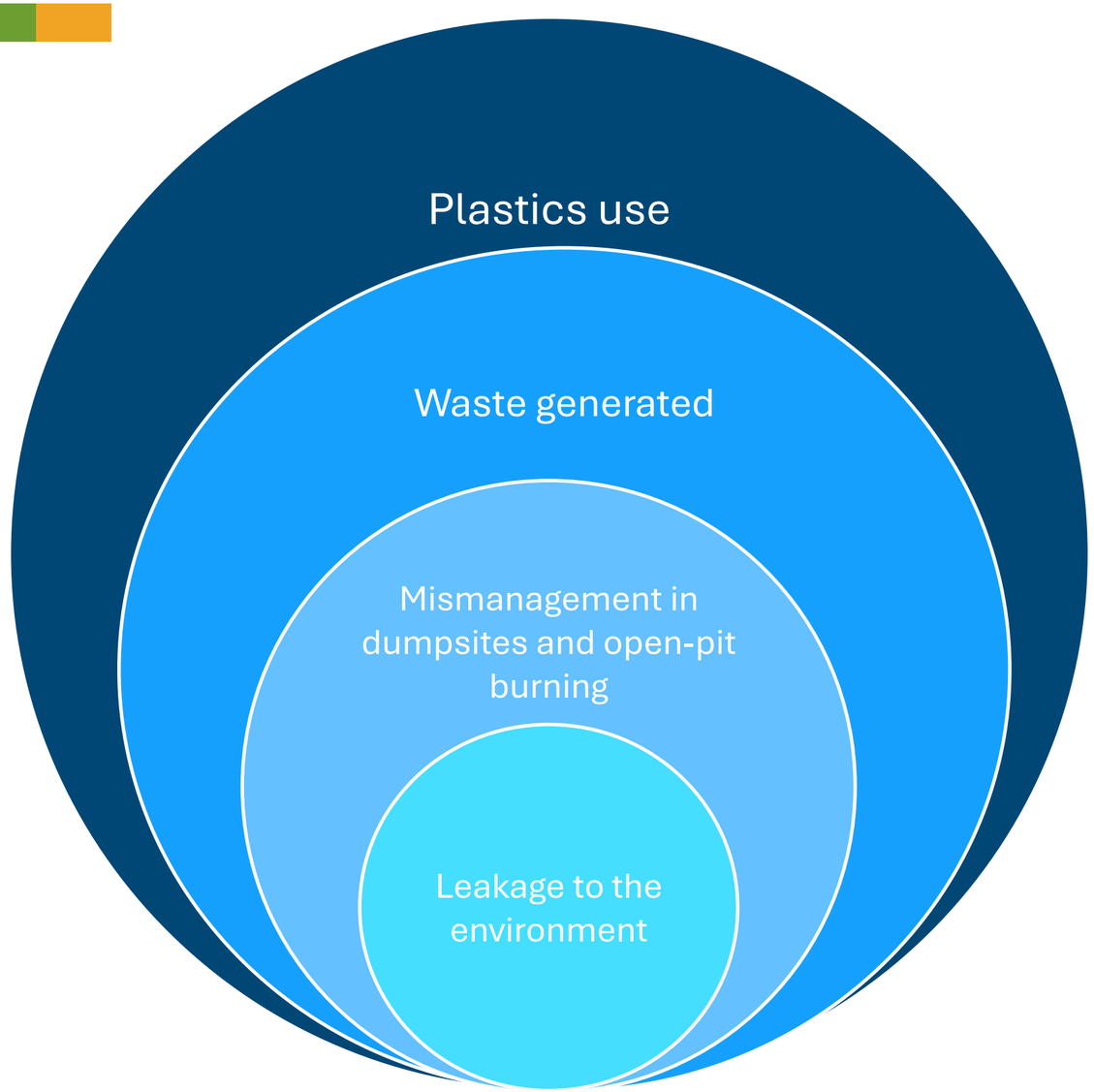


CURRENT POLICIES FALL SHORT OF ELIMINATING PLASTIC LEAKAGE IN THE REGION



Between 2022 and 2050…

From 152 Mt to 280 Mt

From 113 Mt to 242 Mt

From 33 Mt to 56 Mt

From 8.4 Mt to 14.1 Mt

More than one-third reaches rivers, coastal areas and oceans

ASEAN LMICs are particularly vulnerable to intraregional transport of leakage

HOW CAN THE REGION END PLASTIC POLLUTION?

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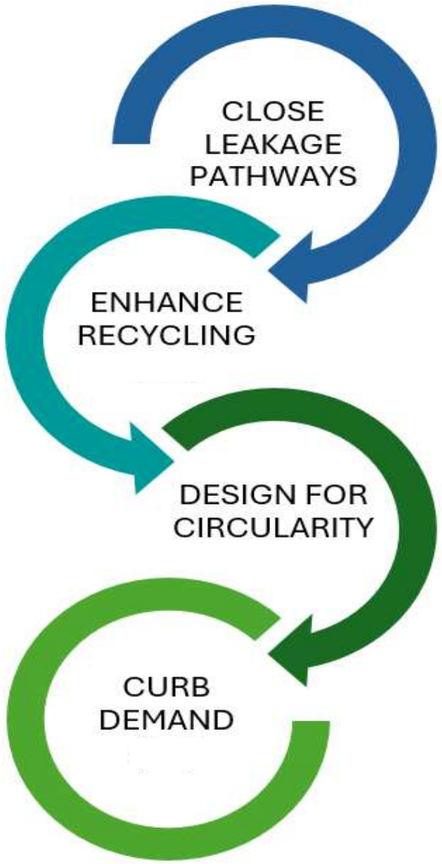
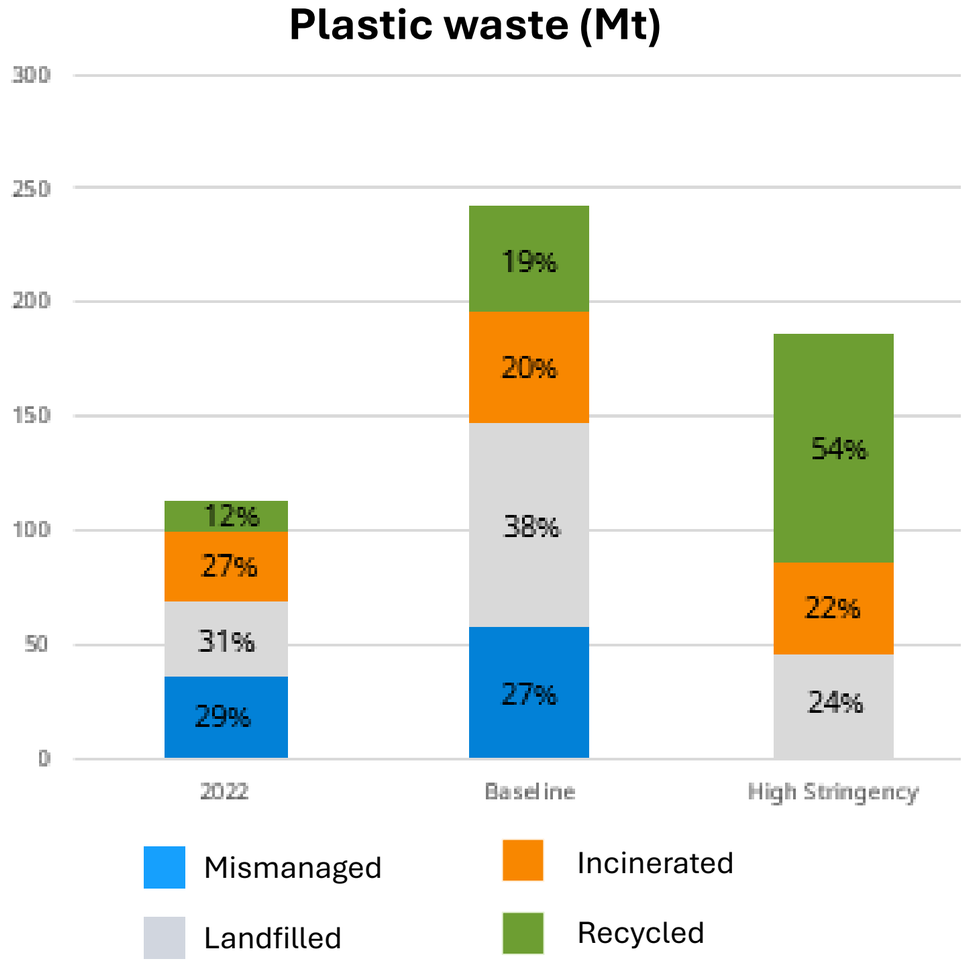
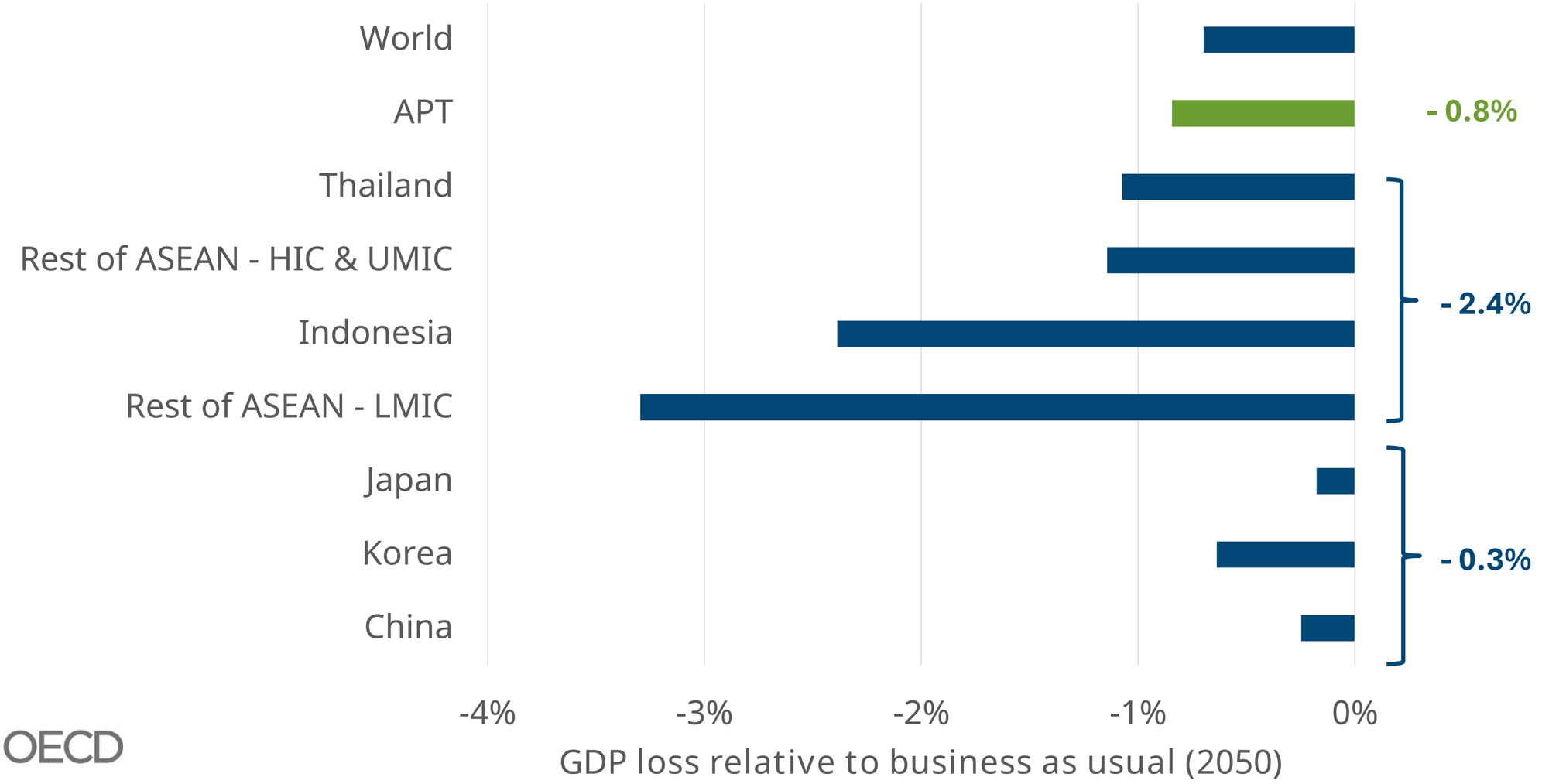
STRINGENT POLICIES CAN ELIMINATE PLASTIC LEAKAGE IN THE APT





- Plastics use is reduced by **28%** compared to the Baseline scenario
- Growth in plastics demand (above 2022 levels) met through **secondary plastic production**
- Recycling will need to quadruple to **54%**
- Mismanaged waste and leakage to the environment are **almost eliminated (<1% of plastic waste)**
- Co-ordinated global action is needed to eliminate plastic leakage globally (*Global High Stringency*), but **APT can virtually eliminate leakage in its own region through ambitious action**

MACROECONOMIC COSTS ARE HETEROGENEOUS AND LARGER FOR LOWER MIDDLE-INCOME COUNTRIES



CONCLUDING REMARKS

- APT countries are **acting**, with encouraging but uneven progress
- Current policies can **slow, but not reverse**, recent trends in regional plastic leakage
- While global co-operation is needed to end plastic pollution on a global scale, APT countries can **nearly eliminate plastic leakage** in the region through stringent policies across the lifecycle
- Stronger policy design, implementation and financing is needed. Ending plastic pollution will require **capacity building, stronger enforcement and regional co-operation**

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