Introducing the Alliance to End Plastic Waste

November 2021
The global plastic waste problem demands bold ambition

The world produces 380 million tons of plastic a year

70%
Today, only 70% of plastic waste is collected, and only 15% is recycled

x2
Plastic production will double by 2040 as the global middle class expands

11 mmt of plastic waste enters the oceans every year

x3
Plastic waste leakage into the ocean will triple by 2040 if nothing is done

Plastic waste is also a giant economic challenge

Managing it properly would generate more than US$120 billion of value
A system change in the plastic value chain is important if we are to meet our commitments to climate change

Organisations are making commitments…

…but even if they **fully meet** these commitments, annual leakage of plastic waste into the oceans will still rise from

**11 million tonnes** a year today to

**29 million tonnes** a year by 2040*

...and it is a challenge to meet these commitments

Post-consumer resin (PCR) as % of plastic packaging materials: situation today and average targets for 2025*

*Breaking the Plastic Wave, Pew Charitable Trusts

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The Alliance to End Plastic Waste is a community of companies committed to getting ahead of this challenge.

Since 2019, we have convened a global network of industry leaders and partners across the plastics value chain. Together, we have built a portfolio of more than 30 projects across over 60 cities.

Key principles:

1. Act now… or risk permanent damage for future generations
2. Collective action… no organisation can tackle this alone
3. A cross-value chain approach… no single business sector can drive true system change
4. A do-tank, not a think-tank… discussion, policy, and public pledges are good, but we need real action and real investment
Our network is growing
Alliance funding is directed into four strategic areas…

**Infrastructure**
Many communities, mainly in Asia and Africa, do not have systems to collect & manage plastic waste or to increase recycling.

The Alliance is funding new approaches to build and deploy critical infrastructure for plastic waste management.

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**Innovation**
We support ideas that scale new technologies and solutions for a circular economy, with funding, capacity building and incubation services.

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**Education**
Lasting change is only possible if everyone knows why and what it takes to end plastic waste in the environment.

We work with communities at local scale to drive deeper engagement.

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**Clean up**
Every community should have universal access to an environment free of plastic waste.

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~60% investment allocation  
~20% investment allocation  
~15% investment allocation  
~5% investment allocation
Solutions must be sustainable, scalable, catalytic, and circular

1. **Sustainable**
   - Our solutions must be economically self-sustaining

2. **Scalable**
   - Our projects must serve to prove new business models that can be replicated by others

3. **Catalytic**
   - Our investments must serve as catalytic capital, de-risking new ideas that can attract further investment

4. **Circular**
   - We strive always for full circularity, but recognise that interim solutions are often needed
Global thinking, local action

At launch, the Alliance strategy was to focus entirely on high-leakage geographies. This meant a heavy emphasis on South-east Asia and India.

Today, these high-leakage geographies remain critical to the mission. But we also recognise the need to work in more sophisticated settings too, where investment is needed to prove and de-risk solutions further up the waste hierarchy.

<table>
<thead>
<tr>
<th>Geography</th>
<th>Focus of funding</th>
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<tbody>
<tr>
<td>Asia Pacific</td>
<td>~60-65%</td>
</tr>
<tr>
<td>Europe</td>
<td>~5-10%</td>
</tr>
<tr>
<td>North America</td>
<td>~5-10%</td>
</tr>
<tr>
<td>South America</td>
<td>~5-10%</td>
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<tr>
<td>Africa &amp; Middle East</td>
<td>~10-15%</td>
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Closing the gaps to achieve a Circular Economy of plastics

Circularity Gap Analysis

**AFFORDABILITY GAP**
- Costs to deliver PCR quality and quantity desired may exceed value derived.

**QUALITY GAP**
- PCR must be ‘fit-for-use’ w/o contamination. Advanced sorting and advanced recycling are needed.

**QUANTITY GAP**
- Basic collection & processing systems are needed in many regions. Advanced sorting enables rigid and flexibles recovery for full circularity.

**DESIGN GAP**
- Using recycled resin, optimising material usage, consider alternatives and design for recycling.

**DATA GAP**
- Improving data at all points of the plastic value chain, particularly waste management

**ALIGNMENT GAP**
- Many differing opinions exist relative to solutions possible, steps required, and responsibilities

**RAW MATERIALS**
- Design for circularity
- Optimise production
- Optimise packaging and distribution
- Optimise use and consumption
- Optimise reuse and repair

**RESIDUAL WASTE**
- Raw materials
- Demonstrate and scale advanced recycling
- Increase education & engagement for citizen participation in recycling
- Increase access to collection
- Increase and improve sorting

**RAW MATERIALS**
- Design for circularity
- Improve end markets
- Demonstrate and scale advanced recycling
- Increase education & engagement for citizen participation in recycling
- Increase access to collection
- Increase and improve sorting
THANK YOU!