



Why a circular economy for plastics in South Africa?

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Why a focus on the circular economy?

**“The circular economy not only represents a trillion-dollar economic opportunity globally,
but is a key part of the global solution to
tackle plastic waste, address climate change,
and restore the health of ecosystems.”**

**Mark Barnaba, Board member of the Reserve Bank of Australia and
co-chair of Sea The Future**



RESERVE BANK OF AUSTRALIA



Why a focus on the circular economy?

“...a circular economy is key to building an economic system that is viable in the long run,
in which value is created and maintained,
rather than extracted and wasted.”

Keith Tufey, Managing Director & Vice Chairman, and Global Co-Head of Sustainability & Corporate Transitions, **Citi**





What does this mean for South Africa?

- Will there be real benefits in our context?
- How will the transition to a circular economy for plastic packaging affect our GDP?
- Will there be nett job gain or loss?

Modelling a circular economy for plastic packaging by 2050:

- Reduction in consumption of single-use packaging by 30%
- 50% substitution of virgin plastic for recycled plastic
- Scaled reuse/ refill models



What does this mean for South Africa?

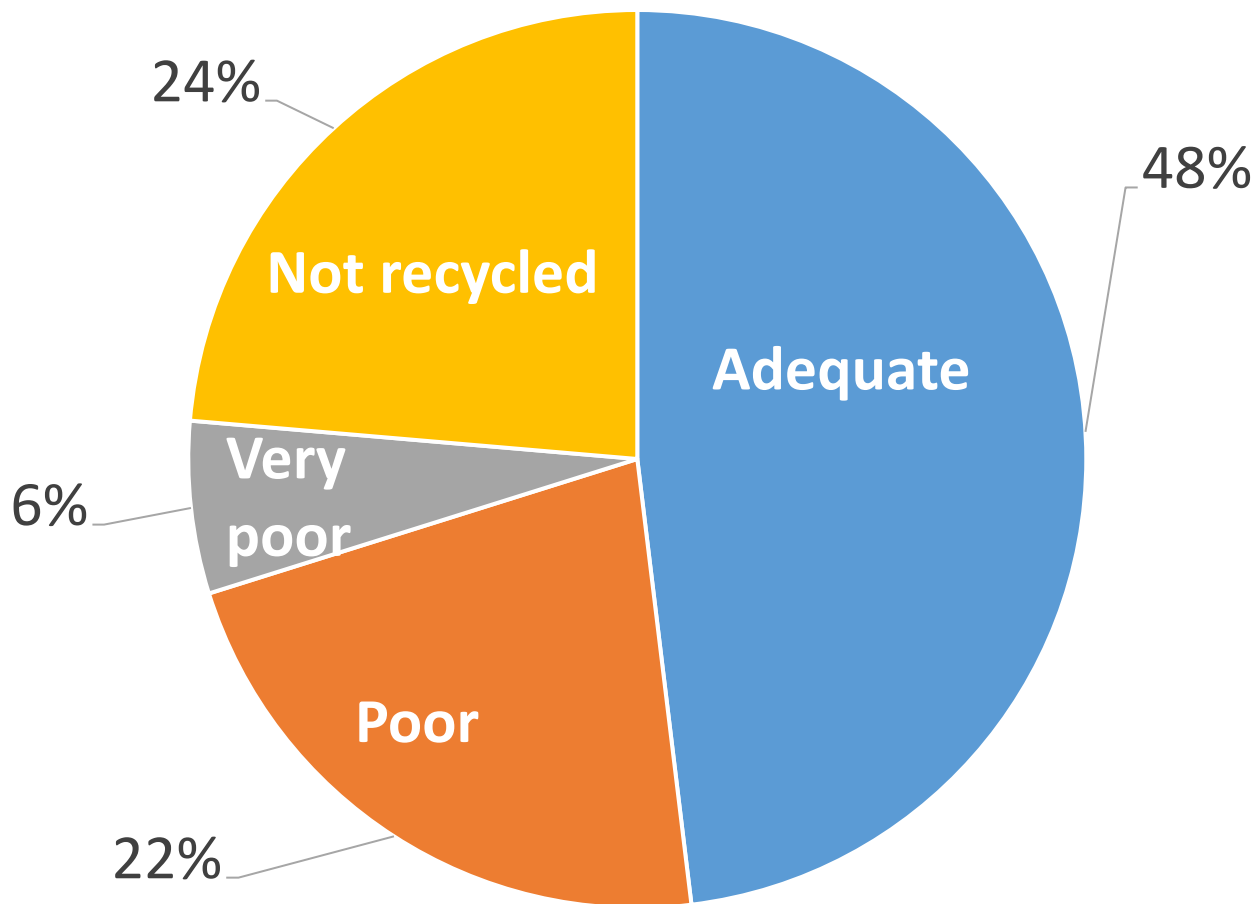
Transition from a linear economy to a circular economy in plastic packaging by 2050



- Increased economic activity
 - Cumulative GDP growth of 2%
 - Additional \$7.2 billion in GDP growth (R108 billion)
- Increased income opportunities
 - Increased demand for skill and unskilled jobs
 - NB inclusivity



What is the state of circularity in plastic packaging?



The range of recyclability in South Africa
- Adequate >30% is effectively recycled
- Poor 15-29% is effectively recycled
- Very poor <15% is effectively recycled
- Not recyclable - Not recycled in South Africa



What circular opportunities are we considering?

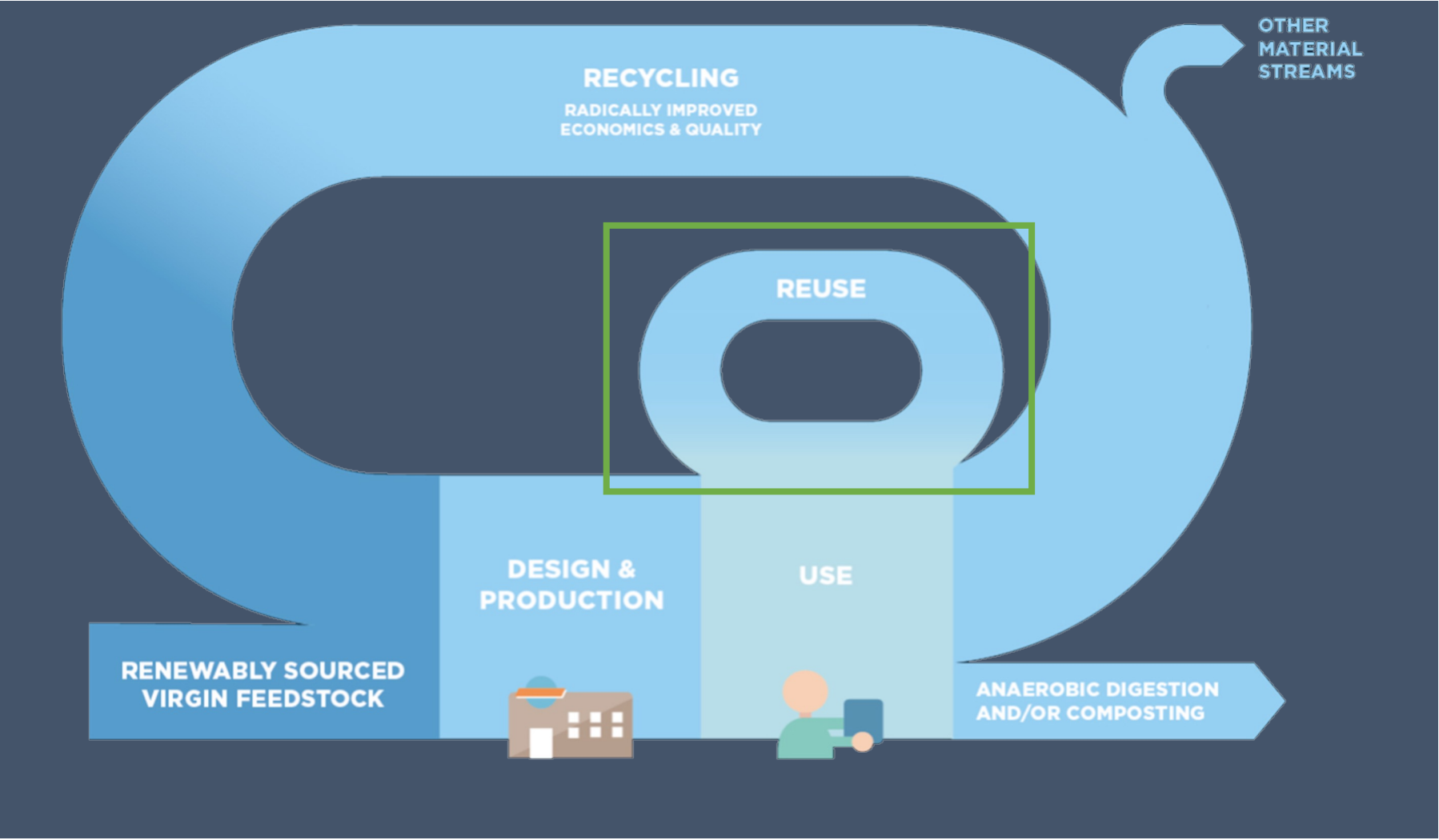
Upstream

- Redesign for circularity
 - Reuse/ refill models
 - (design for) Optimum recyclability – for multiple use cycles
 - (design for) Inclusion of recycled content

Downstream

- Increasing recycling tonnages
 - Supply
 - Additional recovery, separation at source and sorting
 - Increasing capacity in recycling plants
 - Improving quality of recyclate (linked to demand)
 - Demand
 - Closing-the-loop – recycled content back into packaging
 - Developing end markets for products with high value at end of life

Opportunities in reuse/refill





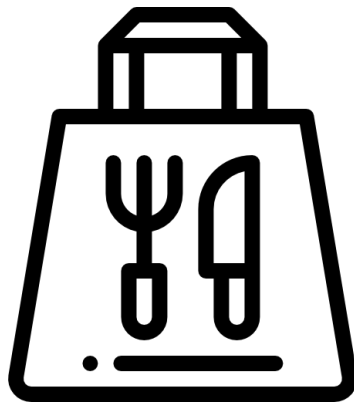
Potential in Reuse/ refill models

- Shifting 20% by weight of plastic packaging to reuse = \$9 billion (EMF, 2017)



Focus areas for reuse

Inclusive reuse models

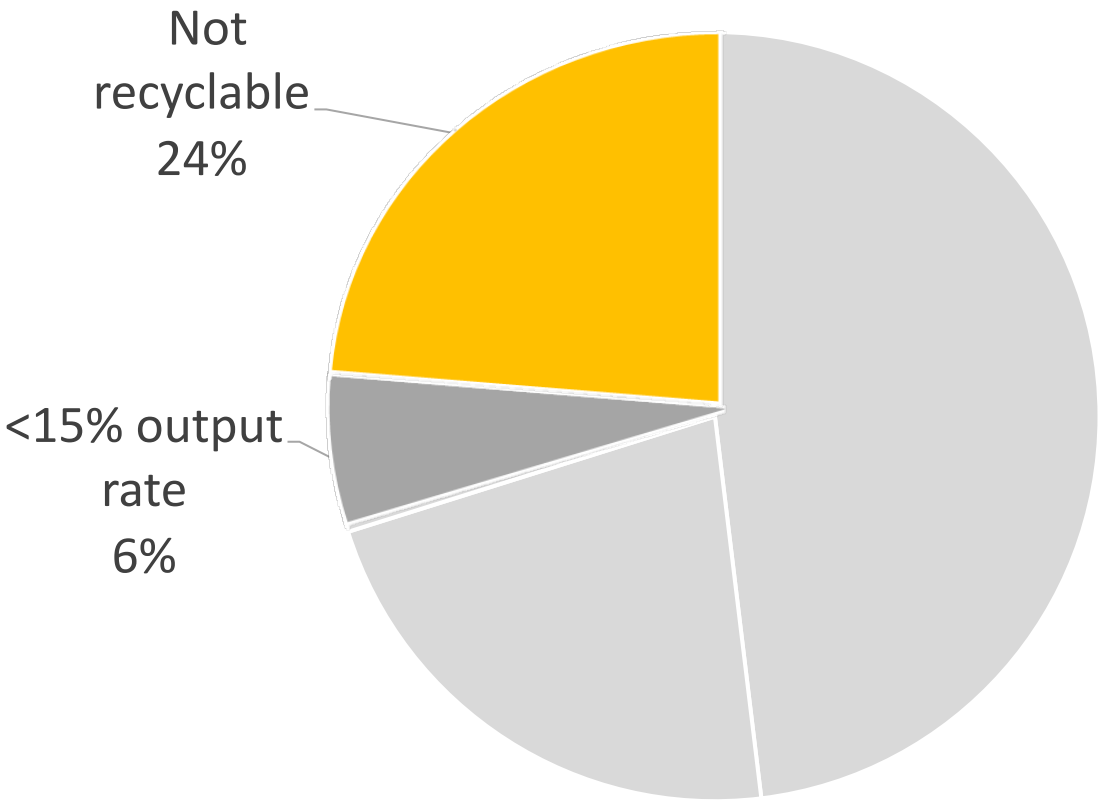


On-the-go
packaging – often
highly leaked

Location -
Far from
recycling
markets



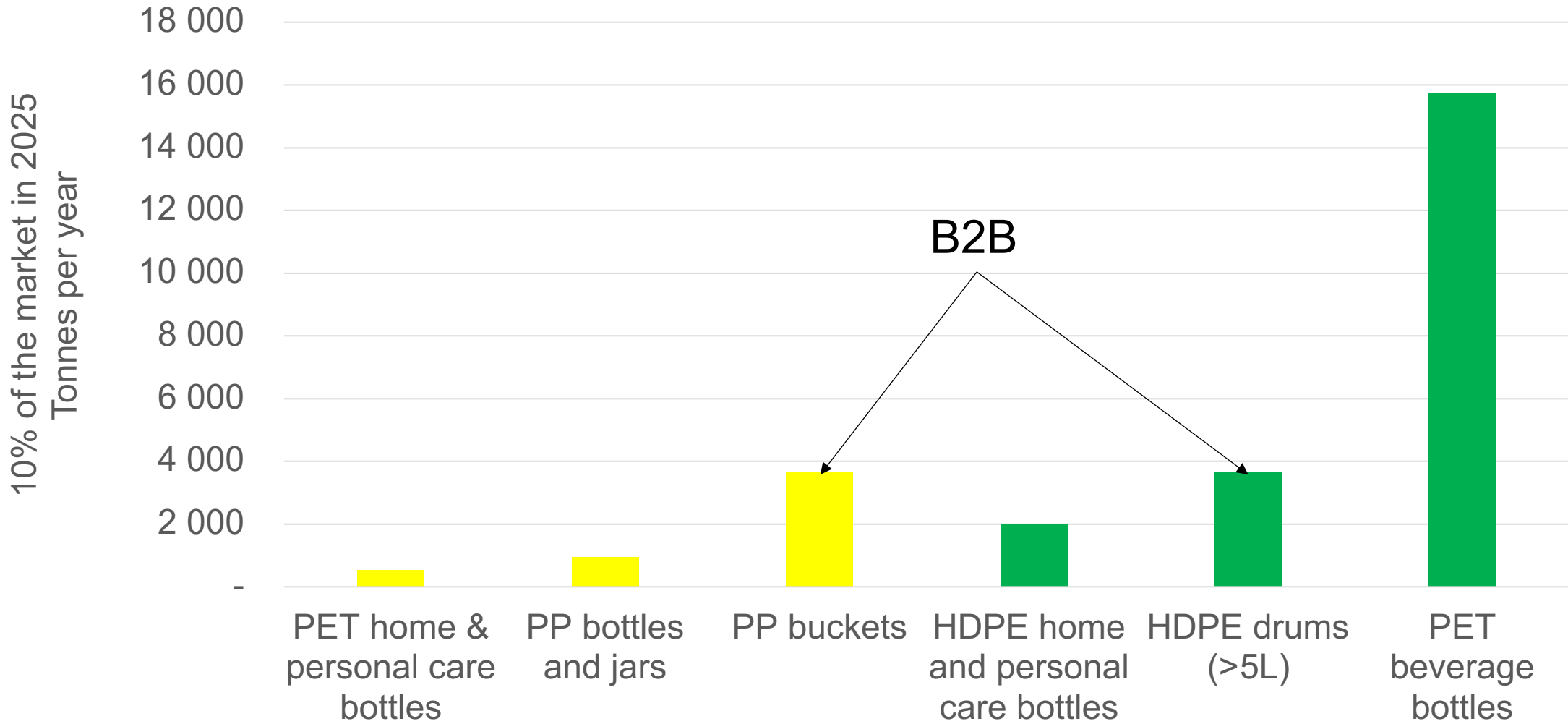
Recyclability – low to not recycled





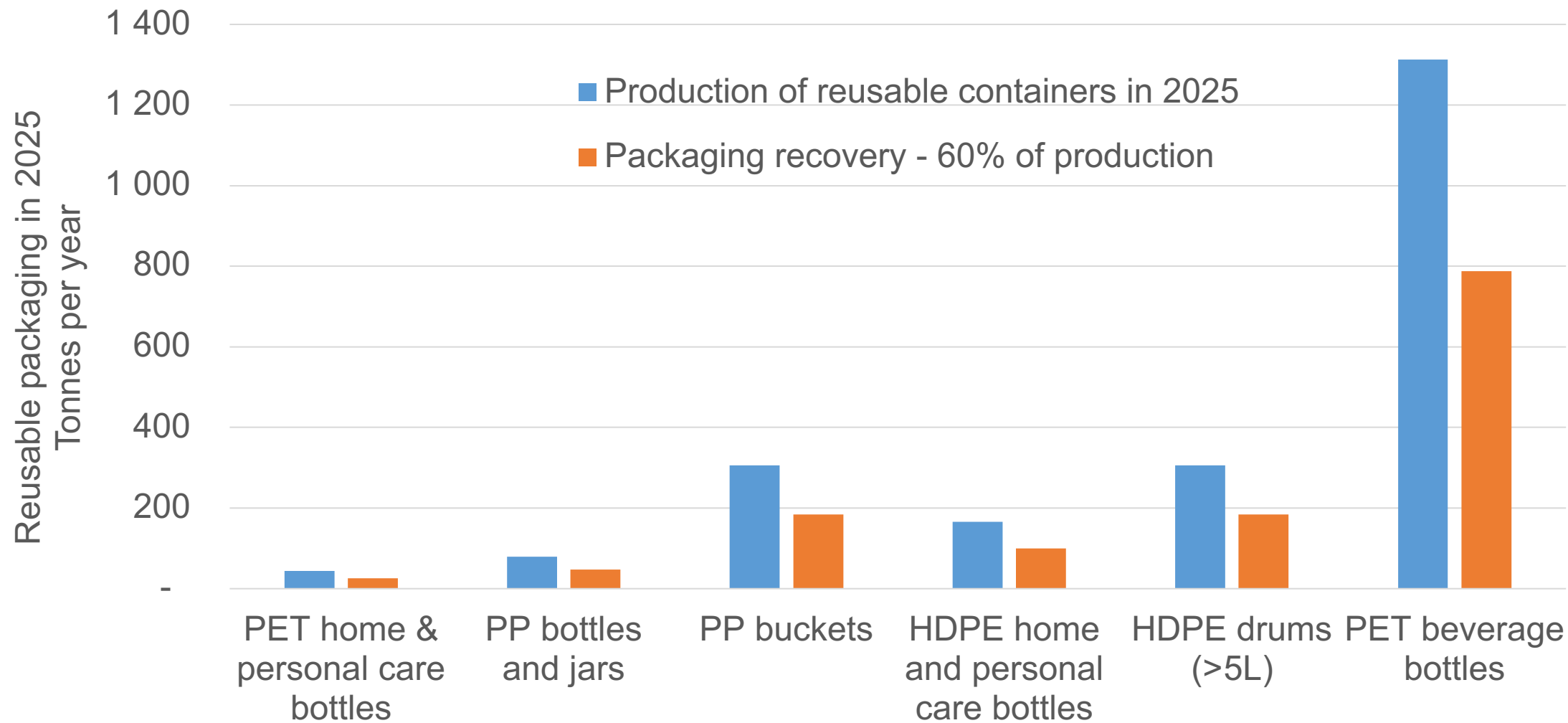
Designing reuse/refill for SA

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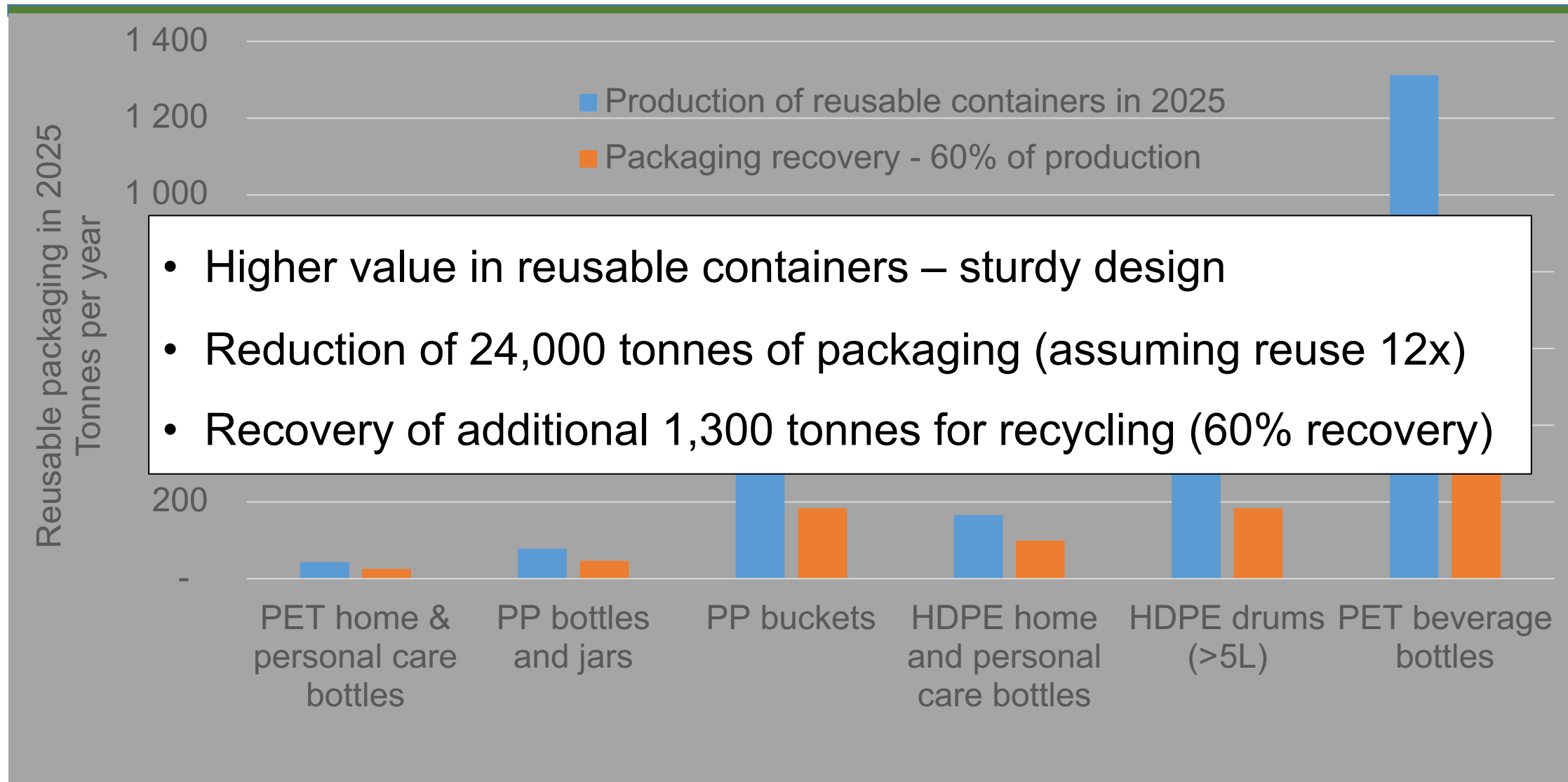




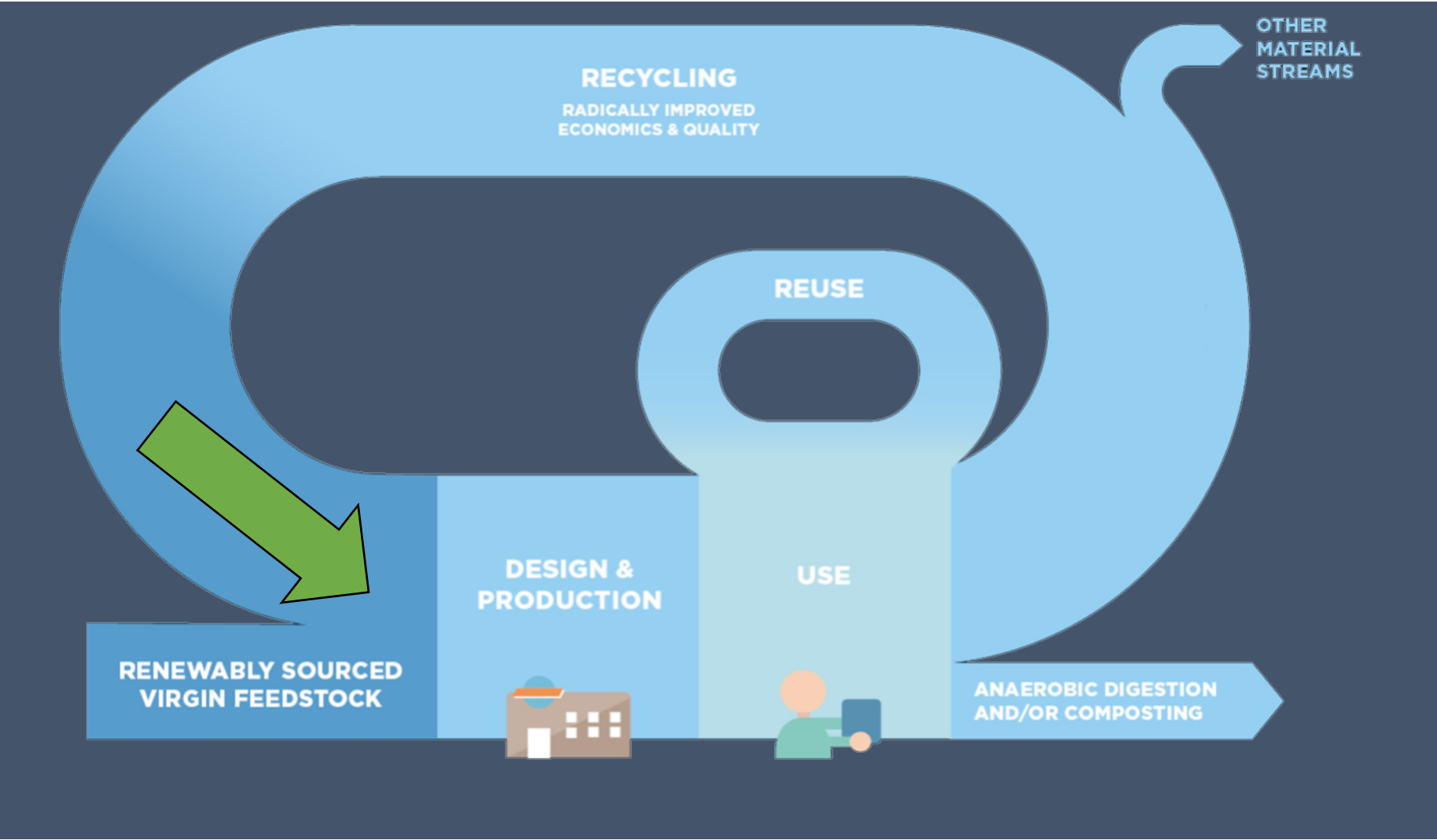
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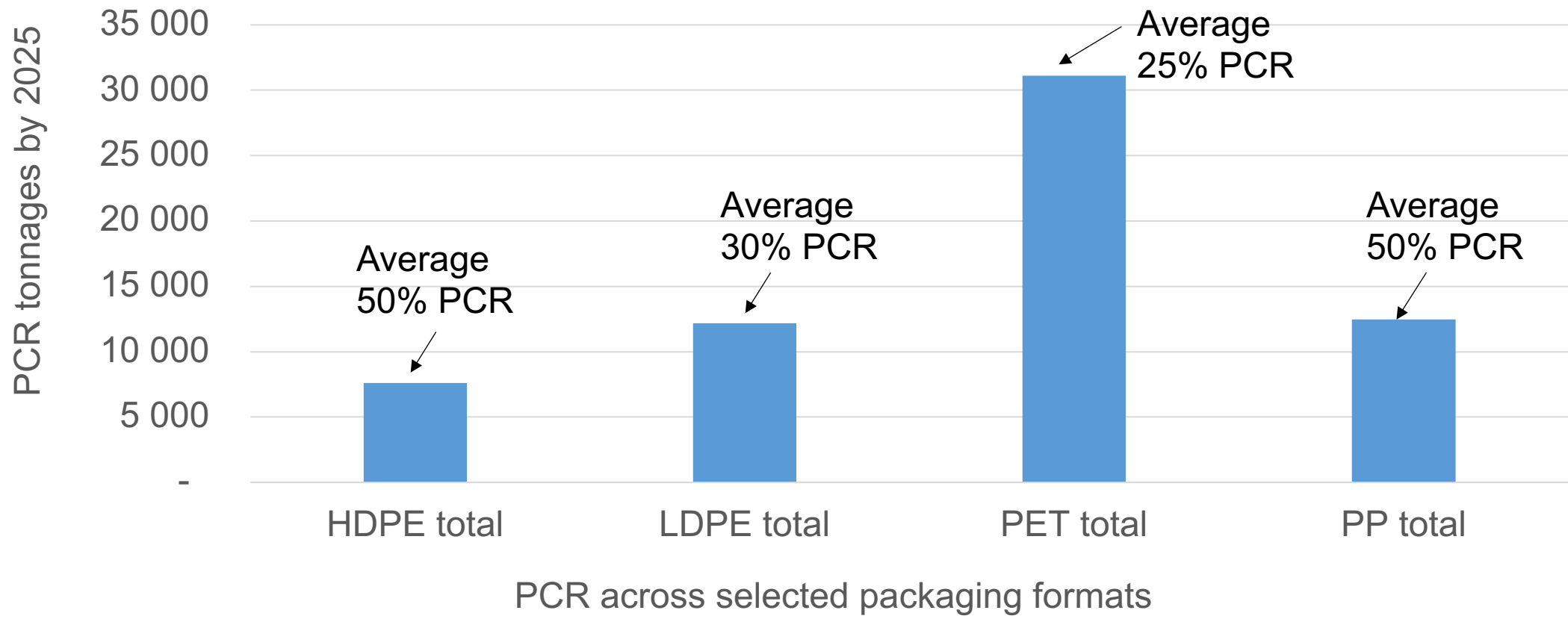
Opportunities in closing the loop





Opportunities in recycled content

- By 2025

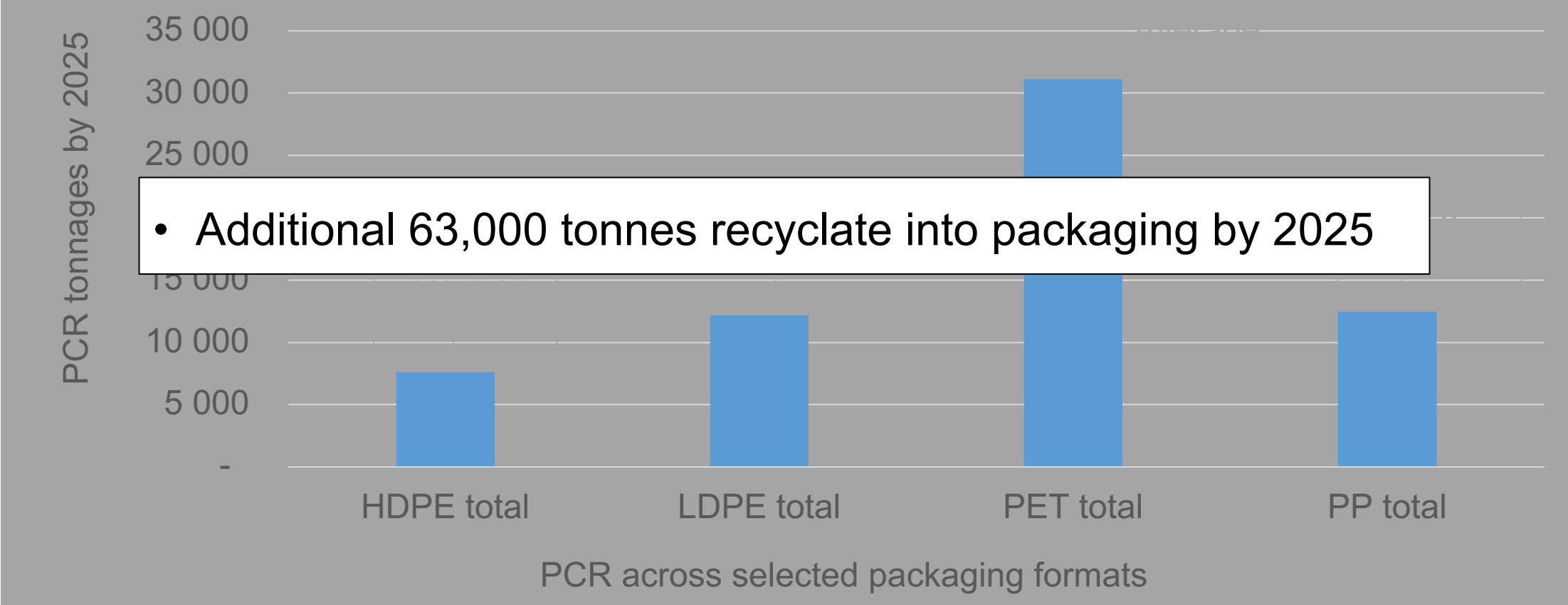


PCR = post-consumer recycle



Opportunities in recycled content

- By 2025



PCR = post-consumer recycle



Barriers to opportunities in recycled content

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Realising the opportunities in circular plastics

- No single organisation
- No single sector

Drivers

- Extended Producer Responsibility
 - Increase demand for recycled content assist in meeting collection and recycling targets
 - To be developed
 - Eco-modulation
 - Reuse targets?
- Export markets – bold strides in Europe, Plastics Pact network countries
- UNEA 5 resolution – global legally binding treaty, including harmonised standards

Opportunity to position business to create and maintain value in a circular economy



Thank you

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