



# INTRODUCTION

## MINDEROO FOUNDATION

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### Who we are:

Established by Andrew and Nicola Forrest in 2001

One of Asia Pacific's largest philanthropic organisations

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### Our Mission:

To arrest unfairness and create opportunities to better the world

## NO PLASTIC WASTE

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### 2030 Twin Goals:

- Eliminating plastic leakage to nature
  - Accelerating a circular economy for plastics
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### Program pillars:

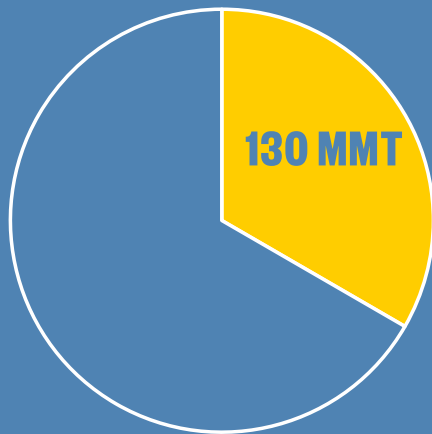
- Industry initiative: Sea the Future
- Supply Chain Transparency
- Technology & Innovation
- Policy & Regulation

**FOCUS  
TODAY**



# SINGLE-USE PLASTICS: WHY DO WE CARE?

**1/3 OF ALL PLASTICS  
WE CONSUME**



**ALMOST ALL VISIBLE  
OCEAN POLLUTION**



**POLLUTION ON  
LAND & IN THE AIR**





# SUPPLY CHAIN TRANSPARENCY

## FILLING THE GAPS



**5 PRIMARY POLYMERS**  
**98% FOSSIL-FUEL-BASED**



**ACCOUNTABILITY**

# PLASTIC WASTE MAKERS INDEX

## WHAT HAVE WE DONE?

### 1. FOLLOW THE MATERIALS



**Who** produces the polymers forming single-use plastics?

**How much** ends up as waste?

### 2. FOLLOW THE MONEY



**Who** funds this production and is enabling the waste crisis?

### 3. FOLLOW THE COMMITMENTS



**What** is the outlook for polymer production?

# HOW DID WE DO IT?

## RESEARCH PARTNERS

### ANALYTICS



### ACADEMIC



### LIMITED ASSURANCE



# 1. GLOBAL MATERIAL FLOW MODEL

## METHODOLOGY

	STEP 1	STEP 2	STEP 3	STEP 4	STEP 5	STEP 6
MATERIAL FLOW	Polymer production	Polymer trade	Polymer conversion	Trade in single-use plastics in bulk	Trade of single-use plastics in finished goods	Single-use plastics MSW*
KEY DATA SOURCE	Wood Mackenzie	Export Genius UN Comtrade	Wood Mackenzie American Chemistry Council	UN Comtrade	McKinsey Global Institute World Bank World International Trade Solution	Result of this analysis
DATA AVAILABILITY	1,200+ facilities	500k+ bills of lading	12+ conversion processes	16 HS Codes	4 value chains	~300 companies 100+ countries

# WHAT DID WE LEARN:

## 5 MAJOR FINDINGS

**1.**



**IN 2019, JUST 20  
POLYMER PRODUCERS  
GENERATED MORE  
THAN HALF  
OF ALL SINGLE USE  
PLASTIC WASTE  
GLOBALLY**

**2.**



**HOUSEHOLD  
NAME INVESTORS  
AND BANKS ARE  
ENABLING THE SUP  
CRISIS**

**3.**



**COLLECTIVE INDUSTRY  
FAILURE  
TO TRANSITION  
AWAY FROM  
FOSSIL FUELS TO  
CIRCULAR  
PRODUCTION**

**4.**



**PLANNED  
EXPANSION OF  
VIRGIN PRODUCTION  
THREATENS TO  
OVERWHELM HOPES  
OF A CIRCULAR  
PLASTICS ECONOMY**

**5.**



**SINGLE-USE PLASTICS  
ARE AN ENTRENCHED  
GEOPOLITICAL  
PROBLEM**



# RECOMMENDATIONS:

## FOUR CRITICAL STAKEHOLDERS

**1.**

### PRODUCERS

- Disclose levels of virgin vs. recycled production and associated waste “footprint”
- Quit playing lip service to sustainability and seize opportunity to re-tool
- Commit to using circularity measurement and reporting tools

**2.**

### FINANCIAL INSTITUTIONS

- Disclose financing of virgin vs. recycled plastics and associated waste generation
- Commit to funding a circular plastics economy
- Use measures of circularity to inform capital allocation decisions and shareholder action

**3.**

### POLICY-MAKERS

- Target domestic policies at polymer producers
- Require full disclosure from producers and users of single-use plastics
- Accelerate a global treaty on plastic pollution

**4.**

### OTHER COMPANIES IN THE SUPPLY CHAIN

- Design for recyclability
- Reduce unnecessary single-use plastics
- Convert voluntary commitments into firm market signals