



EU-ASEAN Business Council ASEAN Circularity Coalition Regulatory Mapping

Prepared by Aroca Group - https://www.arocagroup.com/



	Plastic Specific Strategy/ Roadmap	Ban of single-use plastics	Levy-charge on single-use plastics	Deposit refund scheme	EPR-based recycling poli- cies	Sorted collection	Voluntary schemes/pilot projects	Import regulation
Brunei	IN PROGRESS	IN PROGRESS	NOT IN PLACE	NOT IN PLACE	NOT IN PLACE	NOT IN PLACE	IN PLACE	IN PLACE
Cambodia	IN PLACE	IN PLACE	IN PROGRESS	NOT IN PLACE	IN PROGRESS	IN PROGRESS	IN PLACE	IN PLACE
Indonesia	IN PROGRESS	IN PROGRESS	IN PROGRESS	IN PROGRESS	IN PROGRESS	IN PROGRESS	IN PROGRESS	IN PROGRESS
Laos*								
Malaysia	IN PLACE	IN PROGRESS	IN PLACE	NOT IN PLACE	IN PROGRESS	IN PROGRESS	IN PLACE	IN PROGRESS
Myanmar*								
Philippines	IN PROGRESS	IN PROGRESS	IN PROGRESS	NOT IN PLACE	IN PLACE	IN PLACE	IN PLACE	IN PROGRESS
Singapore	IN PROGRESS	IN PLACE	IN PROGRESS	IN PLACE	IN PLACE	IN PROGRESS	IN PLACE	NOT IN PLACE
Thailand	IN PROGRESS	IN PROGRESS	IN PROGRESS	NOT IN PLACE	IN PROGRESS	IN PROGRESS	IN PROGRESS	IN PROGRESS
Vietnam	IN PROGRESS	IN PLACE	IN PLACE	NOT IN PLACE	IN PLACE	NOT IN PLACE	IN PROGRESS	IN PROGRESS

* Limited availability of information





SOME KEY TAKEAWAYS



Most of the countries in **ASEAN** do not have comprehensive and enacted levies to discourage the use of single use plastics



innin mining

Only one of the **ASEAN** countries has an enacted comprehensive Deposit Refund Scheme (DRS)



Majority of the

ASEAN countries

strategies through

either dedicated

address plastic waste

strategies or general

sustainability plans

Countries in **ASEAN** have made significant progress when it comes to EPR initiatives



More work needs to be done in comprehensive frameworks for sorting processes in **ASEAN** countries Majority of countries have some form of import restrictions on plastics, more work needs to be done to discourage the trade of non-recyclable plastics by

ASEAN countries







REGULATORY AREA	NOTES	STATUS
Plastics specific strategy/road- map	 There is no specific strategy or roadmap to address plastics. The government had set strategies to reduce the generation of solid waste nationwide through two action plans: waste minimisation through 3-R (Reduce, Reuse, and Recycle) and targeting of a 15% waste recycling rate by 2020 and 30% by 2035. 	IN PROGRESS
Ban of single-use plastics	• Announcement of intention to ban the manufacture and import of single use plastic bags in 2019.	IN PROGRESS
Levy-charge on single-use plas- tics	• No levy on domestic use of single use plastics, 5% on value of imported plastics as of 2023.	NOT IN PLACE
Deposit refund scheme	No Regulatory Development	NOT IN PLACE
EPR-based recycling policies	No Regulatory Development	NOT IN PLACE
Sorted collection	No Regulatory Development	NOT IN PLACE







Voluntary schemes/pilot projects	 No Plastic Bag Everyday initiative has been in place since 2018. Through the #zerowastebrunei campaign, businesses, including cafes and restaurants, have committed to stop providing single use plastics at least one day a month in a bid to reduce Brunei's plastic waste. An initiative carried out by the Department of Environment, Parks & Recreation since 2018 consisting of three projects namely; House to House Collection Services, Collection of Floating Waste and Debris Boom and Collection of waste underneath houses (Bakut), all with the same aim which is to holistically manage waste found along the Brunei River. Plastic Bottle Free Initiative was introduced in 2018 to encourage green and sustainable habits by swapping plastic bottled water to other (reusable) alternatives and means during events, meetings etc. 	IN PLACE
Import regulation	 In 2023, the Government made provisions for a 5% excise duty on plastics. The excise duty rate was initially set to be \$5/kg, but after feedback from the business community, this rate was amended to 5%. 	IN PLACE

CAMBODIA





REGULATORY AREA	NOTES	STATUS
Plastics specific strategy/roadmap	 Since 2018, the Government of Cambodia has promoted the 4Rs – Refuse, Reduce, Reuse, and Recycle – framework to tackle plastic pollution In 2023, the government released their Circular Strategy on Environment 2023-2028 In 2023, the "Today I will not use plastic campaign" was launched by the Min- ister for Environment. Solid Waste and Plastic Management Improvement Project limited to select- ed areas. Adoption of the 2023 Environmental and Natural Resources Code which covers solid and hazardous waste management. 	IN PLACE
Ban of single-use plastics	 From 22 April 2024, restaurants and merchants will be banned from using and selling single use plastics. 	IN PLACE
Levy-charge on single-use plastics	 There is no national general fee for plastic bags, most vendors are urged to stop providing free plastic bags to consumers on a voluntary basis. As of 2023, a 400-riel levy has been mandatory for supermarkets and shopping malls to charge for the use of plastic bags. 	IN PROGRESS
Deposit refund scheme	No Regulatory Development	NOT IN PLACE





EPR-based recycling policies	• The government is exploring the introduction of the Extended Producer Responsibility (EPR), a policy approach that mandates plastic producers to bear the financial or physical burden for collecting and recycling their end-of- life products.	IN PROGRESS
Sorted collection	• Sub-decree on plastic waste management is still in draft form and aims to increase the effectiveness of plastic reduction on importation, production, distribution and the use of plastic bags in order to improve the public health, environment and landscape.	IN PROGRESS
Voluntary schemes/pilot projects	 Many small and medium-sized enterprises already recycle PET bottles, plastic bags etc. in Cambodia. Other initiatives are led by social enterprises that actively engage local communities including informal waste pickers and provide them with income generation opportunities. 	IN PLACE
Import regulation	 In 2023, the special tax on imports of plastic products increased to 10% from 7%. In addition, non-paper products are subject to a 15% tariff. 	IN PLACE





REGULATORYAREA	NOTES	STATUS
Plastics specific strategy/roadmap	No specific strategy, but addressed in the following:	IN PROGRESS
	o 18/2008 Law on Solid Waste Management	
	o Regulation No. 33/2010 on Waste Management Guideline	
	o No.81/2012 on Domestic Waste and Similar Waste Management: this regulation emphasizes the responsibilities of producers particularly in re- lation to production materials and product packaging. It mandates that pro- ducers gradually implement waste reduction activities laid out via roadmap over a 10-year period (Article 13-15).	
	o National policy and strategy on solid waste management (including plas- tic waste) regulated by Presidential Regulation No. 97/2017.	
	o National Action Plan on Marine Debris (2017- 2025).	
	o Presidential Regulation 83/2018 Marine Debris Management.	
	o Circular Economy Strategy – A Road to a National Plan 2021-2024.	

INDONESIA





Ban of single-use plastics	 Ministry of Environment and Forestry announced on 5 June 2023 that it will extend its current bans on certain single-use plastic items to the end of 2029. The bans cover single-use plastic shopping bags; plastic straws and cutlery; and Styrofoam food packaging, nationwide. A ban on the use single-use plastic bags, straws and Styrofoam was implemented on the island of Bali in July 2019. Jakarta made a similar move in 2020, but only banned single-use plastic bags. According to the Presidential Regulation 97/2017, from 2030 onwards, there will be a complete ban on plastic straws, plastic bags and single-use polysty-rene packaging. 	IN PROGRESS
Levy-charge on single-use plastics	 Government regulation concerning excise on plastic shopping bags being finalized after levies being trialed in certain cities since 2016. Some modern retailers voluntarily charge consumers IDR200 per plastic shopping bag. 	IN PROGRESS
Deposit refund scheme	 No nationwide mandated refund scheme. Some industry-led initiatives in progress to use the DRF scheme for PET bottles and aluminium cans 	IN PROGRESS

INDONESIA





EPR-based recycling policies	 The government issued ministerial regulation No. 75/2019 on EPR road map to reduce product and packaging waste from brand owner manufacturer, retailer, and food/beverages service industry. Manufacturers will also be required to reduce their use of plastic packaging by 30% to promote the growth of sustainable businesses and circular economy in the country, and provincial governments will be mandated to establish a plastic waste reduction road map to support the ban. The regulation specifically addresses packaging made of plastic, aluminum (cans), glass and paper. According to the regulation, from 2030 onwards, there will be a complete ban on plastic straws, plastic bags and single-use polystyrene packaging. Parliament's plan to revise the Law No.18/2008 on Waste that introduces new responsibilities for producers and local municipalities gained traction in 2022, but has not progressed further in the current parliament. 	IN PROGRESS
Sorted collection	 Partially implemented in some cities and regions but no comprehensive program in place. 	IN PROGRESS

INDONESIA





Voluntary schemes/pilot projects	Multiple pilot projects of take-back and recycle schemes for PET bottle, Tet- raPak carton, and flexible plastic (sachets and pouches) are in place	IN PROGRESS
Import regulation	 Increasing government commitment to limit import of waste including plastic waste). Paper and plastic shipments to Indonesia will be allowed a maximum of 2% contamination. The Coordinating Ministry of Maritime and Investment Affairs (CMMIA) alongside MoEF are actively engaged in the negotiation of International Legally Binding Instrument (ILBI) on plastic pollution 	IN PROGRESS







REGULATORY AREA	NOTES	STATUS
Plastics specific strategy/road- map	 Malaysia Plastics Sustainability Roadmap 2021 – 2030 provides a legal framework on plastic production, consumption, recycling and waste management in a holistic approach. The roadmap is also an effort to promote sustainable development through an equilibrium between economic growth, environmental protection, and social wellbeing through circular economy principles. It focuses on four types of resins that are widely used in Malaysia: PP, PET, HDPE, and LDPE/LLDPE. The roadmap also provides for the transition from voluntary to mandatory EPR by 2026, with plans for capacity building, advocacy programs, and an EPR governance framework. Roadmap towards Zero Single Use Plastics (2018- 2030) has been in place with a vision to take a phased, evidence-based and holistic approach by involving all stakeholders in jointly addressing single-use plastics pollution in Malaysia. 	IN PLACE
Ban of single-use plastics	 The "no straw by default" policy was introduced in 2019, but the use of plastic straws is still widespread in Malaysia. The government plans to ban single-use plastic bags by 2025. Currently there is 2 "no plastic bag" campaigns that began in 2022 and would continue to 2025, when the ban is due to be implemented. Stated goal is to phase out single use plastics by 2030. 	IN PROGRESS







Levy-charge on single-use plas- tics	 Under the roadmap on plastics, Malaysian retailers began to charge a minimum RM0.2 for single use plastics bags in 2021. A levy on plastic bags has also been in place since Jan 2021 for shoppers in Penang, who are charged RM1 for each plastic bag purchased from Thursdays to Sundays. No plastic bags are sold on the other days. The stated target is to ban the use of plastic bags for retail purposes across all business sectors nationwide by 2025. 	IN PLACE
Deposit refund scheme	No Regulatory Development	NOT IN PLACE
EPR-based recycling policies	 The Twelfth Malaysia Plan, 2021-2025, recognises the introduction of CE principles to be achieved through, among other measures, EPR. The implementation of an EPR scheme covering plastics is planned in a phased approach; it is currently on a voluntary basis and is becoming a mandatory scheme by 2026 as outlined in the Malaysia Plastics Sustainability Roadmap (2021-2030). The elements of the voluntary EPR are: The Solid Waste and Public Cleansing Management Act 2007 (of Act 672), - for instance, mandates the separation of recyclable waste at source and power to establish EPR through a take back and deposit refund system. The Environmental Quality Act 1974 outlines the power to set minimum content of recycled substances and specify substances to be reduced, recycled, and reused. 	IN PROGRESS







Sorted collection	 In August 2022, the Ministry of Housing and Local Government (KPKT) launched a strategic partnership with Malaysia Recycling Alliance (MAR- EA) for a pilot EPR study conducted in Langkawi to identify the current local waste management and recycling landscape, which will pave the path for greater coverage of identified solution throughout the island. 	IN PROGRESS
Voluntary schemes/pilot projects	 The Malaysian Recycling Alliance Berhad (MAREA) was officially launched in January 2021. MAREA is a voluntary PRO organization backed by several multi-national companies in Malaysia. Multiple public private partnerships have been established with municipal councils for the piloting of EPR programmes. Nestle, for instance, have es- tablished Project SAVE, a voluntary EPR initiative, in efforts to meet its goal to make 100% of its packaging materials recyclable, compostable or reus- able by 2025. 	IN PLACE
Import regulation	 A levy of RM15 per metric ton of plastic imports was announced in 2018. The importation of plastic waste under the HS Code 3915 is controlled under the Custom (Prohibition of Import) Order 2017 which requires an Approved Permit (AP). An AP is issued by Department of National Solid Waste Management, Malaysia AP is given per shipment which needs to be completed within validated period of the AP. Malaysia is restricting plastic waste imports and will ban scrap shipments of the material starting in 2025. 	IN PROGRESS







REGULATORY AREA	NOTES	STATUS
Plastics specific strategy/roadmap	 The Republic Act 11898 (EPR Act) was passed in 2022. This law holds manufactures of plastic packaging products liable throughout the life cycle of the product. However, it is only applicable to large companies with assets of over PHP100 million. No other comprehensive strategy or roadmap specific for plastics currently. 	IN PROGRESS
Ban of single-use plastics	 Several Local Governments have crafted ordinances banning plastic bags. Quezon city has an ordinance effective from February 2020 which prevents restaurants and hotels from using disposable plastic products such as cutlery. 	IN PROGRESS
Levy-charge on single-use plastics	 Some local governments have imposed levies for the use of plastic bags in retail environments. It was reported in early 2024 that a proposed bill which passed the House of Representatives in 2022 will be pushed to the Senate. The draft bill introduces a levy of PHP 100 for every kilogram of single use plastic produced or imported. The bill only covers plastics that are not recyclable and would be imposed on manufacturers and importers. 	IN PROGRESS
Deposit refund scheme	No Regulatory Development	NOT IN PLACE







EPR-based recycling policies	 The Republic Act 11898 (EPR Act) was passed in 2022 and it establishes a comprehensive framework for companies with assets over PHP 100m in assets. 	IN PLACE
Sorted collection	 The Republic Act 11898 established a framework for comprehensive recy- cling program. 	IN PLACE
Voluntary schemes/pilot projects	 There are a various clean river initiatives and rehabilitation projects in place. Philippines Alliance for Recycling and Materials Sustainability (PARMS) works with government and the private sector to drive implementation of voluntary EPR initiatives. 	IN PLACE
Import regulation	 A draft bill which passed the House of Representatives in 2022 and will be presented to the Senate proposes a PHP100 levy per kilogram on the impor- tation of single use plastics. 	IN PROGRESS







REGULATORY AREA	NOTES	STATUS
Plastics specific strategy/roadmap	 Singapore has no specific plastics strategy but plastic waste is addressed in the Zero Waste Masterplan (2019) 	IN PROGRESS
Ban of single-use plastics	 National Environment Agency (NEA) has disallowed the usage of disposables for dine-in meals at all new hawker centres, and at existing hawker centres which have adopted the use of common crockery and centralised dishwashing services under the Productive Hawker Centres programme. In addition, NEA does not allow new cooked food stallholders at existing hawker centres to provide disposables to patrons for dine-in meals. 	IN PLACE
Levy-charge on single-use plastics	 A disposable carrier bag charge has been implemented from 3 July 2023 at supermarket outlets operated by companies with an annual turnover of more than \$100 million. No national levy in place. 	IN PROGRESS
Deposit refund scheme	 Beverage Container Return Scheme to commence on 1 April 2025, with full implementation on 1 July 2025. A 10-cent deposit will be added to the prices of beverages sold. 	IN PLACE







EPR-based recycling policies	 Mandatory Reporting requirements for packaging data, including plastic and 3R plans for packaging commenced 1 July 2020. Singapore aims to have an EPR framework in place for packaging waste including plastic by 2025 (Zero Waste Masterplan). 	IN PLACE
Sorted collection	 National Recycling Programme has been in place since 2001 which provides collection services. 	IN PROGRESS
Voluntary schemes/pilot projects	 A number of voluntary initiatives in place including; Singapore Packaging Agreement; Packaging Partnership Programme; Schools Recycling Corner Programme; Voluntary commitment to ban plastic straws etc. in the food industry. 	IN PLACE
Import regulation	 No import taxes imposed. Import of plastic waste for disposal is prohibited unless special permit is sought. 	NOT IN PLACE







REGULATORY AREA	NOTES	STATUS
Plastics specific strategy/roadmap	 Thailand Roadmap on Plastic Waste Management (2018-2030). Action Plan on Plastic Waste Management (2023-2027). Expected implementation of Draft Sustainable Packaging Management Act by 2025 and the introduction of mandatory EPR by 2027. 	IN PROGRESS
Ban of single-use plastics	 From 2019-2026, roadmap envisages reducing and eventually stopping the use of single use plastics. In April 2022, single use plastics are banned from national parks for the conservation of natural resources. 	IN PROGRESS
Levy-charge on single-use plastics	 Voluntary plastic bag tax in place since 2021. Scheme encourages retailers to charge customers for plastic bags. Exemption of corporate income tax for the purchase of biodegradable plastics products. 	IN PROGRESS
Deposit refund scheme	 The government is studying the possibility of a deposit refund system for packaging. 	NOT IN PLACE







EPR-based recycling policies	The government has developed the Waste Electrical and Electronic Equip- ment (WEEE) Plan 2022-26 and is considering other 3R promotion plans with concepts of EPR and circular economy.	IN PROGRESS
Sorted collection	The Ministry of Interior and the Ministry of Public Health have issued notifica- tions on municipal solid waste separation and collection.	IN PROGRESS
Voluntary schemes/pilot projects	 Pilot project on plastic waste collection in the coastal areas. Reduction of plastic bags in department stores and convenience stores. CAP project involving hotels. 	IN PROGRESS
Import regulation	Import ban on plastic wastes to come into force 1 January 2025.	IN PROGRESS

★ VIETNAM





REGULATORY AREA	NOTES	STATUS
Plastics specific strategy/roadmap	 No plastics specific strategy but the National Strategy of Integrated Solid Waste Management to 2025, vision to 2050, does address the reduction in plastic bag usage. 	IN PROGRESS
Ban of single-use plastics	 Under Decree No. 08/2022/ND-CP of 10 January 2022, the manufacture and import of poorly degradable plastic bags of 50cm x 50cm or smaller and 50cm thick or less shall be prohibited from 2026. On and after December 31, 2030, the manufacture and import of the following products shall be prohibited: o Single-use plastic products (excluding Vietnam Green Label certified products). o Poorly degradable plastic packaging materials (including poorly degradable plastic bags, and plastic foam containers for food packing). o Products containing microplastics (excluding cases where they are intended for export or packaging of other goods). 	IN PLACE
Levy-charge on single-use plastics	 A tax of VND 50,000 (USD2.00) has been in place since 2012. In 2023, the Ministry of Justice put forward a new proposal to the National Assembly to raise the tax on import of non-biodegradable plastic bags and packaging. The document also included a new tax on single-use polystyrene foam food containers. 	IN PLACE
Deposit refund scheme	Nothing in place currently	NOT IN PLACE





EPR-based recycling policies	 Law on Environmental Protection (LEP) and its guiding Decree No. 08/2022/ ND-CP provide a fundamental legal framework for extended producer re- sponsibility (EPR). EPR-related regulations impose obligations on manufacturers and importers of certain types of products and packaging in Vietnam. Nonetheless, the EPR legal framework is not yet complete. 	IN PLACE
Sorted collection	There are ad-hoc processes and initiatives, but no comprehensive system in place.	NOT IN PLACE
Voluntary schemes/pilot projects	Several programs operating under the umbrella of the Vietnam National Plastics Action Partnership.	IN PROGRESS
Import regulation	 Planned ban of single use plastics imports by 2026. In March 2023, the Ministry of Justice put forward a new proposal to the National Assembly to raise the tax on import of non-biodegradable plastic bags and packaging. The document also included a new tax on single-use polystyrene foam food containers. 	IN PROGRESS





- <u>https://www.worldbank.org/en/country/thailand/publication/market-study-for-thailand-plastics-circularity-opportunities-and-barriers</u>
- https://www.worldbank.org/en/country/malaysia/publication/market-study-for-malaysia-plastics-circularity-opportunities-and-barriers
- <u>https://www.worldbank.org/en/country/philippines/publication/market-study-for-philippines-plastics-circularity-opportunities-and-barriers-report-landing-page</u>
- <u>https://www.ellenmacarthurfoundation.org/</u>
- https://www.businessforplasticstreaty.org/latest/policy-briefings-in-advance-of-inc-4
- <u>https://www.un.org/en/climatechange/nations-agree-end-plastic-pollution</u>
- <u>https://www.unep.org/</u>
- <u>https://www.unep.org/beatpollution/beat-plastic-pollution/gameplan-it-is-time-to-beat-plastic-pollution?gad_source=1&gclid=CjwKCA-jw0YGyBhByEiwAQmBEWsNXYVk00-P5eHG0WPFG7tAefWuFWALG2wWtnHzYcdRgu5oOI0RhWBoC-0oQAvD_BwE</u>
- https://www.oecd.org/environment/





- https://commission.europa.eu/energy-climate-change-environment_en
- https://asean.org/wp-content/uploads/2021/10/Framework-for-Circular-Economy-for-the-AEC_Final.pdf
- <u>https://documents1.worldbank.org/curated/en/099731406282241639/pdf/P1673071d02f2c0be180741356b6b0e3deb.pdf</u>
- https://emb.gov.ph/ra-11898-extended-producer-responsibility-on-plastic-packaging-waste/
- https://www.oecd.org/ocean/topics/ocean-pollution/marine-plastics-pollution-Philippines.pdf
- <u>https://www2.deloitte.com/content/dam/Deloitte/nl/Documents/strategy-analytics-and-ma/deloitte-nl-strategy-analytics-and-ma-the-price-tag-of-plastic-pollution.pdf</u>