



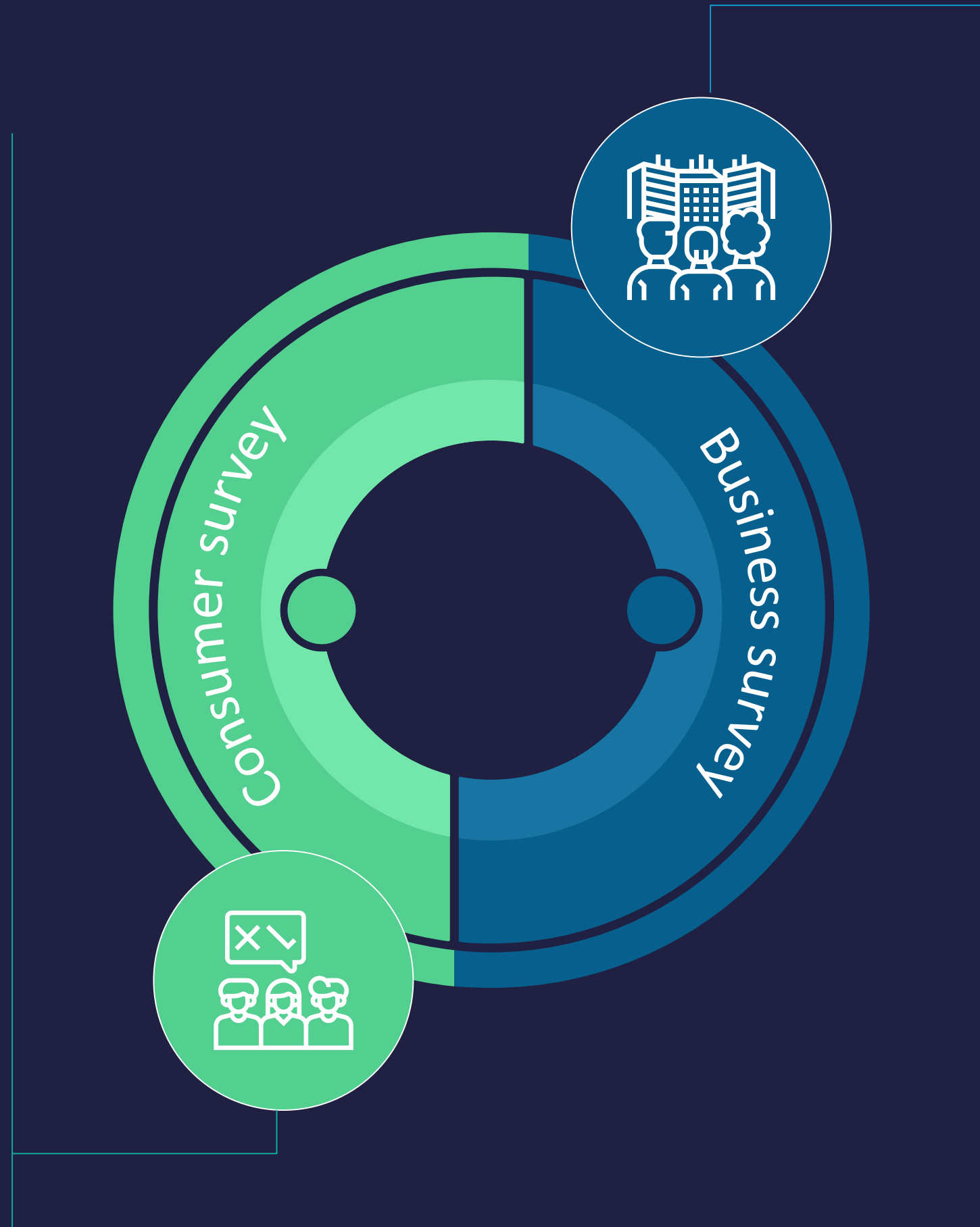
SEA  
circular  
solving plastic pollution at source

Perceptions on plastic waste:  
Insights, interventions and incentives to  
action from businesses and consumers in  
South-East Asia

UN Environment Programme (UNEP), Food Industry Asia (FIA) and AlphaBeta  
Virtual Report Launch | 23 June 2020

# HOW WAS THE RESEARCH DONE?

This report used online consumer surveys (translated into the local languages) in Indonesia, Malaysia, the Philippines, Thailand and Viet Nam. Quotas were added to ensure the sample matched the demographics of the country (e.g., gender, age, income). For statistical significance, a minimum sample size of **400** respondents in each country was analysed. To obtain indicative insights on the impact of urbanisation on plastic waste awareness, responses from Tier 1 cities were considered as urban while responses from other cities were considered as rural (in-line with similar studies)



400 food & beverage businesses were surveyed across the 5 countries (with a minimum of 50 businesses per country)

Thank you to our local partners:

- **Indonesia** – Gabungan Pengusaha Makanan dan Minuman Seluruh Indonesia (GAPMMI)
- **Malaysia** – International Islamic University Malaysia (IIUM) and the Federation of Malaysian Manufacturers Malaysian Food Manufacturing Group (FMM MAFMAG)
- **Philippines** – Philippine Chamber of Food Manufacturers, Inc. (PCFMI)
- **Thailand** – Department of Environmental Quality Promotion (DEQP), Ministry of Natural Resources and Environment
- **Viet Nam** – Academy of Policy and Development, Ministry of Planning and Investment (MPI)



# THERE IS A DISCONNECT BETWEEN CONSUMERS' CONCERN WITH PLASTIC WASTE ISSUES AND THEIR PURCHASING DECISIONS

## Sentiments toward consumer patterns regarding plastic waste issues






Survey respondents who agree or strongly agree to the statement, %

5 countries



# THERE ARE IMPORTANT DIFFERENCES ACROSS THE FIVE COUNTRIES AND THE FREQUENCY OF HOUSEHOLD WASTE COLLECTION IS ONE EXAMPLE

## How often is your household waste collected by a waste collection organisation?

Percent of survey respondents <sup>1</sup> , %		Daily	Weekly or less (but not daily)	Monthly (including less often than weekly)	Never
	<b>5 countries</b>		<b>36</b>	<b>53</b>	<b>4</b>
Indonesia 		23	41	10	25
Malaysia 		29	64	3	4
Philippines 		25	69	3	3
Thailand 		35	60	3	2
Viet Nam 		65	32	2	1

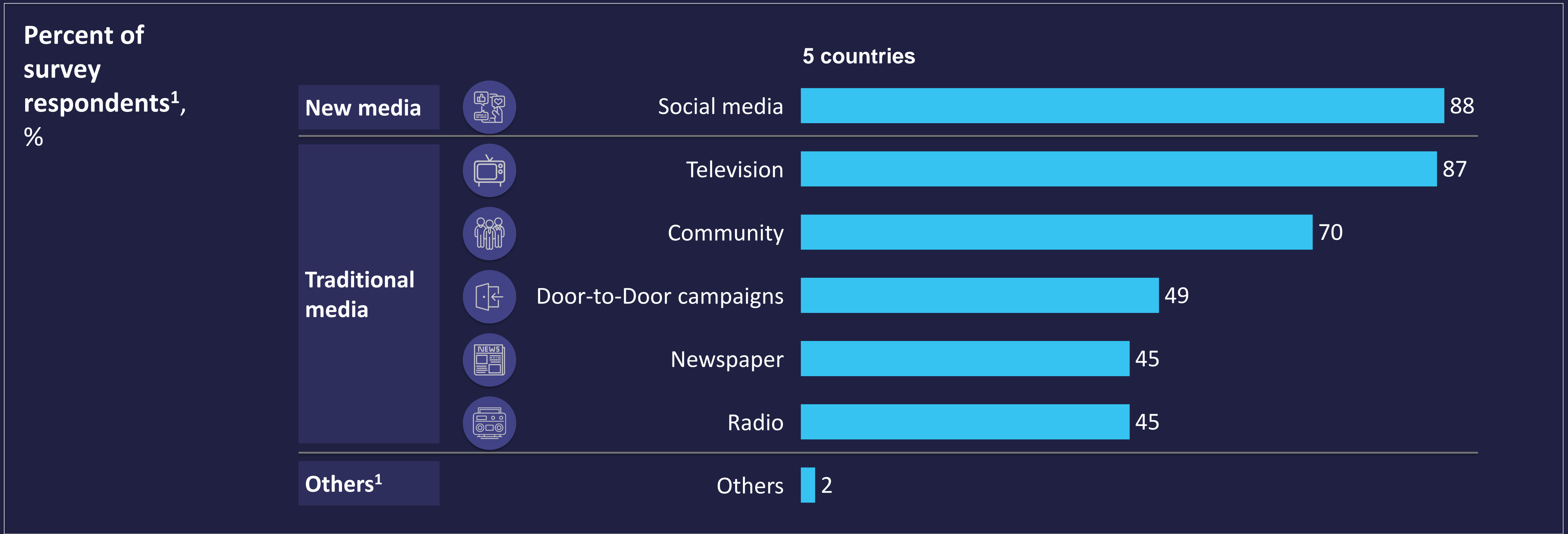
<sup>1</sup> May not add up to 100% due to rounding. Consumers that indicate “Don’t know” to this question are removed for the analysis. There are about 1 percent of all consumers who have indicated this response.

Source: Consumer surveys conducted in 2020 in Indonesia, Malaysia, Philippines, Thailand and Viet Nam; n = 2,000 (400 in each country)



# SOCIAL MEDIA IS THE MOST EFFECTIVE PLATFORM TO LEARN MORE ABOUT AND BE ENCOURAGED TO TAKE ACTION ON PLASTIC WASTE ISSUES

Perspectives on the most effective ways for consumers to learn more and be encouraged to take action on plastic waste issues



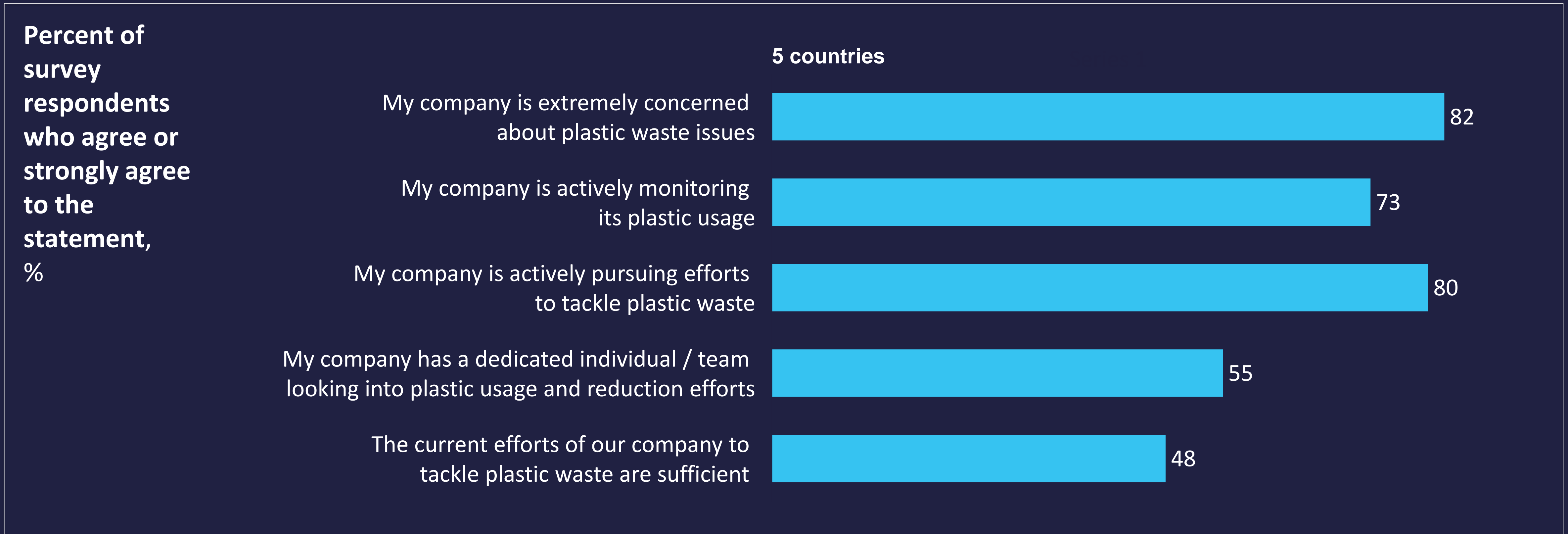
<sup>1</sup> Includes using billboards, fines, incentives and education curriculum.

Source: Consumer surveys conducted in 2020 in Indonesia, Malaysia, Philippines, Thailand and Viet Nam; n = 2,000 (400 in each country)



# MOST BUSINESSES FEEL THAT THEY ARE GENERALLY AWARE OF PLASTIC WASTE ISSUES BUT THEY COULD ALSO BE DOING MORE TO TACKLE THESE ISSUES

## Sentiments toward companies' practices regarding plastic waste issues








Source: Business surveys conducted in 2020 in Indonesia n = 71, Malaysia n = 73, Philippines n = 85, Thailand n = 75 and Viet Nam n = 63; total n = 367

# 80% OF BUSINESSES HAVE TARGETS TO ADDRESS PLASTIC WASTE BUT OUT OF THESE COMPANIES, LESS THAN ONE-THIRD COMMUNICATE IT EXTERNALLY

## Does your company have a target to address plastic waste?

Percent of survey respondents <sup>1</sup> , %	5 countries						
							
No	20	18	45	17	5	21	
Yes	80	83	55	83	95	79	

## For your target, is it communicated internally or externally?

Percent of survey respondents who indicated that their companies have targets <sup>1</sup> , %	Yes	5 countries					
							
	Only communicated internally	68	76	87	76	49	61
	Communicated internally and externally	32	24	13	24	51	39

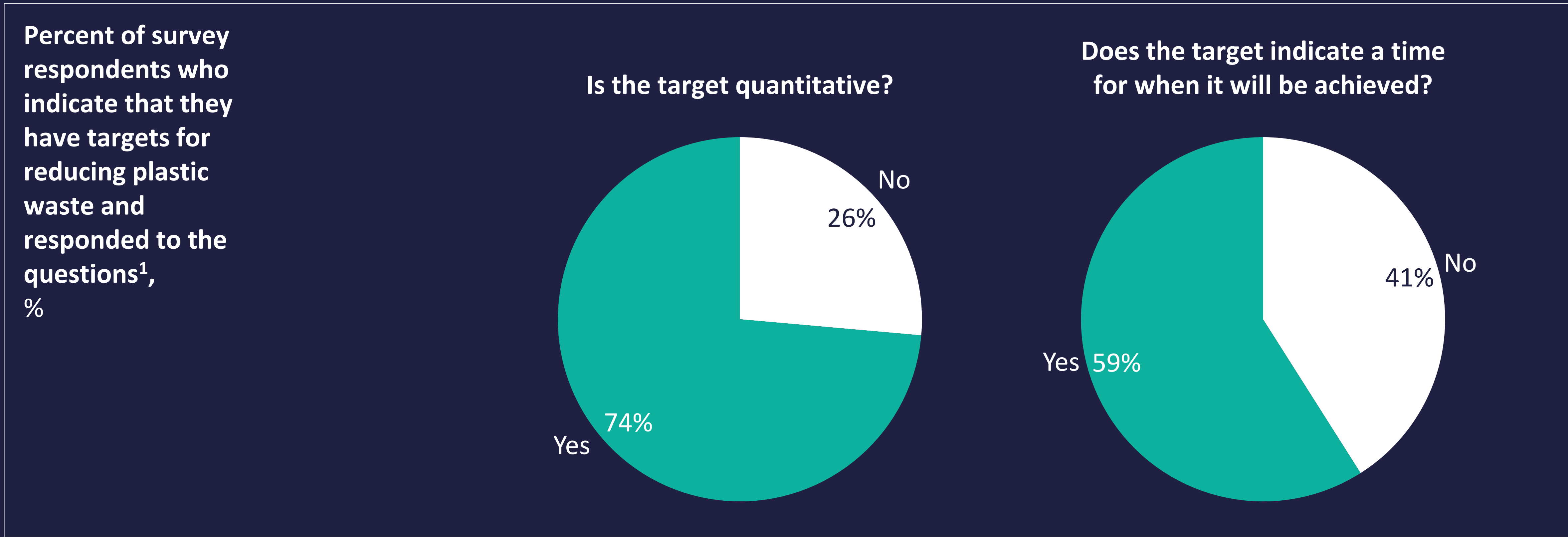


<sup>1</sup> Might not add up to 100 percent due to rounding.

Source: Business surveys conducted in 2020 in Indonesia n = 51, Malaysia n = 56, Philippines n = 65, Thailand n = 66 and Viet Nam n = 58; total n = 296

# OUT OF THE COMPANIES' TARGETS TO REDUCE PLASTIC WASTE, 74% ARE QUANTITATIVE BUT ONLY 59% HAVE INDICATED DEADLINES

## Responses about companies' targets to reduce plastic waste



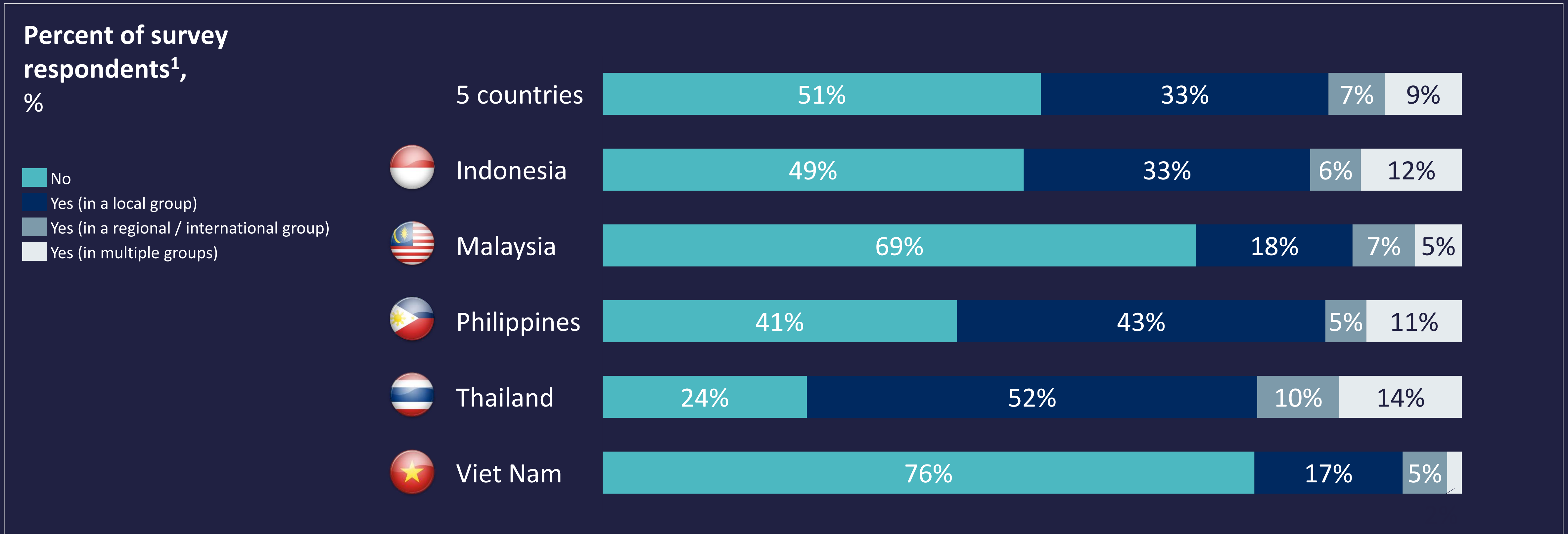
<sup>1</sup> Might not add up to 100 percent due to rounding. 236 businesses in the five countries indicated that they have targets but only 231 businesses answered these questions.

Source: Business surveys conducted in 2020 in Indonesia n = 42, Malaysia n = 31, Philippines n = 52, Thailand n = 60 and Viet Nam n = 46; total n = 231



# OVER HALF OF BUSINESSES IN THE FIVE COUNTRIES ARE NOT PART OF ANY GROUP TACKLING PLASTIC WASTE ISSUES

Is your company part of any group(s) tackling plastic waste issues?

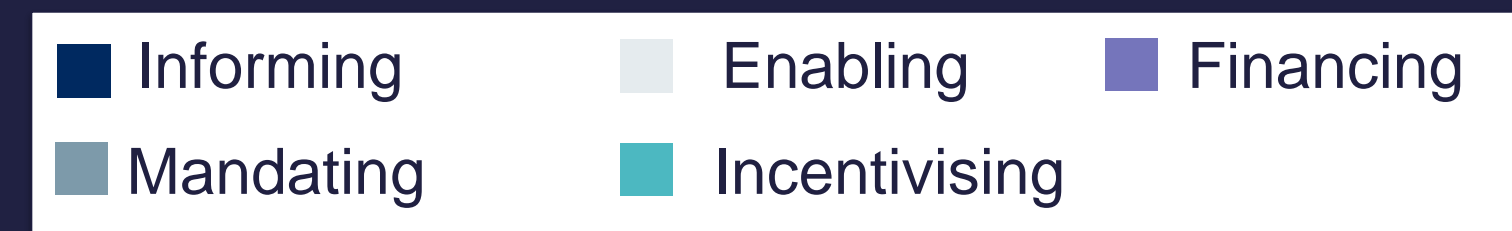


1 Might not add up to 100 percent due to rounding.

Source: Business surveys conducted in 2020 in Indonesia n = 51, Malaysia n = 55, Philippines n = 63, Thailand n = 63 and Viet Nam n = 58; total n = 290



# CONSUMERS AND BUSINESSES ENCOURAGE GOVERNMENTS TO DO MORE



Consumers' and businesses' perspectives on the top 10 actions that are most critical for their governments to adopt to reduce plastic waste<sup>1</sup>

Ranking	Consumers in the 5 countries	F&B businesses in the 5 countries
1.	Mandate consumer waste segregation	Provide information to consumers
2.	Enhance collection systems	Mandate consumer waste segregation
3.	Impose littering fines and consumer charges	Develop labels
4.	Determine product specifications	Share approaches among businesses
5.	Facilitate coastal clean ups	Impose littering fines and consumer charges
6.	Limit plastic waste imports	Map out waste flows
7.	Provide information to consumers	Limit plastic waste imports
8.	Impose landfill measures	Enhance collection systems
9.	Map out waste flows	Mandate reporting on business waste
10.	Provide R&D support	Provide incentives for sale of sustainable products

<sup>1</sup> Respondents could choose up to 10 key actions out of 27 options. Some of the terms used in the consumer surveys have been edited to allow comparisons with the business surveys. For instance, "Require households to separate their waste" has been changed to "Mandate consumer waste segregation".

Source: Consumer surveys conducted in 2020 in Indonesia, Malaysia, Philippines, Thailand and Viet Nam; n = 2,000. Business surveys conducted in 2020 in Indonesia n = 47, Malaysia n = 54, Philippines n = 57, Thailand n = 58 and Viet Nam n = 55; total n = 271



# KEY OPPORTUNITIES FOR CONSUMERS, BUSINESSES, AND GOVERNMENTS



## 1. Consumers

- Close the gap between consumer concerns and purchasing actions
- Use social media to engage consumers on plastic waste issues



## 2. Food & Beverage businesses

- Adopt public, quantified targets with clear timelines
- Promote greater collaborations through relevant local, regional or international initiatives



## 3. Governments

- Mandate waste segregation
- Enhance collection systems
- Promote consistent labelling on product recycling
- Impose littering fines and charges





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