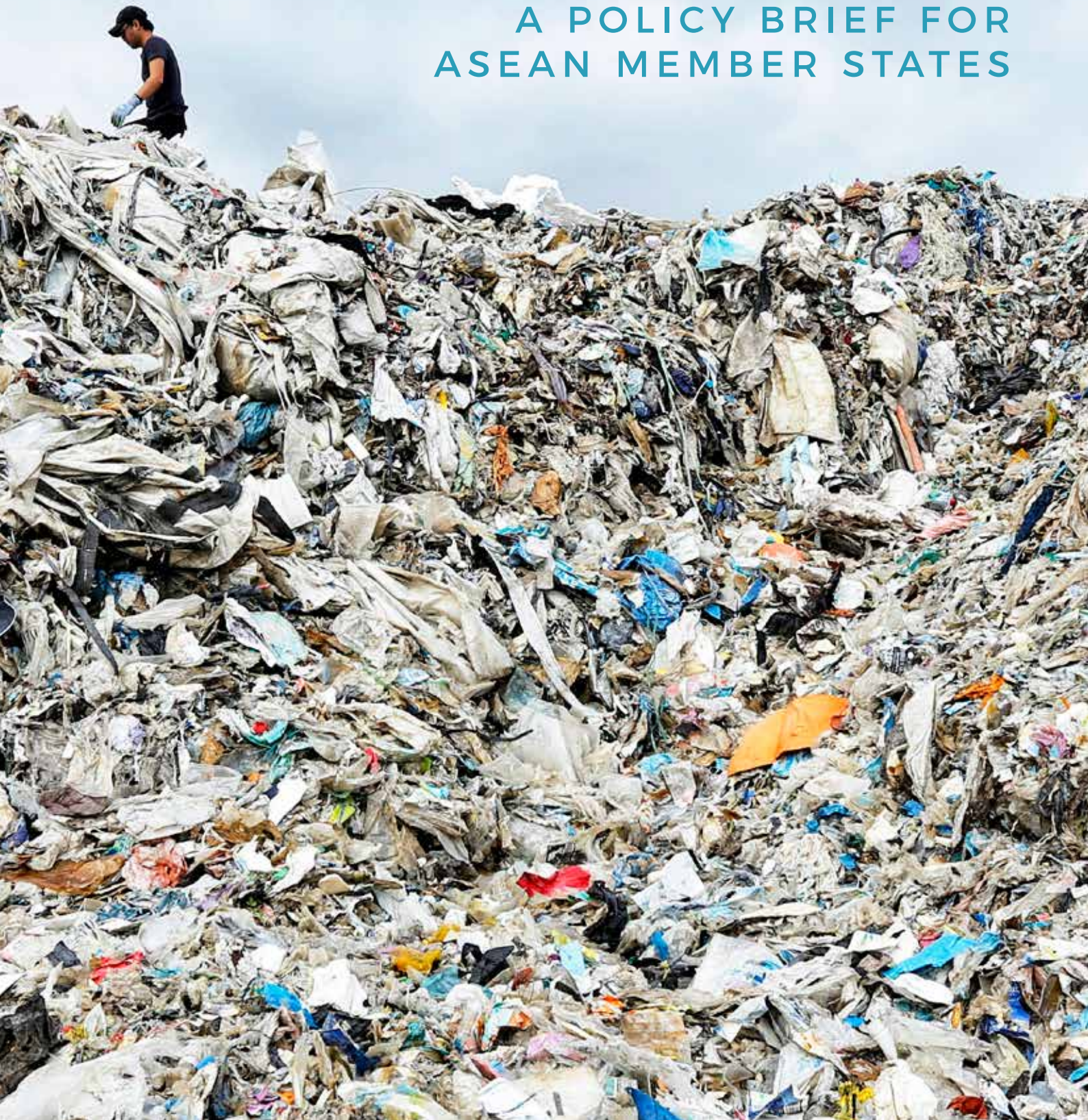


GREENPEACE

SOUTHEAST ASIA'S STRUGGLE AGAINST THE PLASTIC WASTE TRADE

A POLICY BRIEF FOR
ASEAN MEMBER STATES



EXECUTIVE SUMMARY



As leaders from the 10 countries that make up the Association of Southeast Asian Nations (ASEAN) prepare to meet in Bangkok for the 34th ASEAN Summit this June, it is perhaps surprising to note that the issue of plastic waste imports does not currently feature on the three-day agenda. Indeed, the last year has seen many of these nations, notably Malaysia, Philippines and Thailand, leading a growing push back against a deluge of unwanted and toxic shipments of waste from the developed world since China's decision to ban imports. And it's easy to see why by just looking at the statistics. Between 2016 and 2018, the ASEAN region saw plastic waste imports grow by a staggering 171%, from 836,529 tonnes to 2,265,962 tonnes. That's equivalent to around 423,544 20-foot shipping containers.

Making matters worse, much of it is mislabeled as 'recyclable' even though the shipments constitute hundreds of thousands of tonnes of contaminated plastic and other mixed wastes from developed countries that cannot be processed. Some of these imports are illegally shipped into the region, leaving receiving nations with no real capacity to deal with such waste grappling with the magnitude of the mess.

Since the spike in imports, countries have taken measures to counter the growing tide of imports. In recent months, both Malaysia and the Philippines have very publicly sent back waste shipments to their country of origin. Thailand has announced its intention to ban plastic waste imports by 2021. Malaysia has stopped issuing new permits for importing plastic waste. Vietnam has also stopped issuing new licenses for the import of waste and has overseen a crackdown on illegal shipments as thousands of containers of paper, plastic and metal scrap build up at the country's ports, raising concerns about environmental impacts.

But these unilateral measures cannot be the answer to this global waste crisis. Evidence suggests that as countries enact bans and contingency policies, they only help to move the problem elsewhere as importers seek out areas where regulations and restrictions are weaker. They also do not address a deeper underlying issue: how single-use disposable plastic is the greatest obstacle to sound waste and resource management, both within the ASEAN region and globally.



In a policy¹ brief for ASEAN 2017, Greenpeace Southeast Asia called for a ban on single-use plastics, and urged leaders to regulate plastic use and production at source. However, progress has been slow and these issues remain to be addressed if this crisis is to be averted.

Greenpeace Southeast Asia and other environmental groups have documented evidence in the last year, highlighting the significant risk this waste poses to local environments and those living nearby as unspoiled areas are turned into toxic dumpsites overnight².

Therefore, Greenpeace Southeast Asia demands that ASEAN leaders put this issue on the agenda during this year's summits and make a united declaration to address the region's plastic waste crisis. Greenpeace recommends a three-point strategy for ASEAN member states to adopt as they urgently work towards a 'Single-use Plastic-Free World'.

- Declare an immediate ban on all imports of plastic waste, even those meant for "recycling," and ensure all ASEAN countries ratify the Basel Ban Amendment;
- Establish a holistic regional policy geared toward massively reducing the production of single-use plastic packaging and products, and facilitating innovation on reusable packaging and alternative delivery systems; and
- Advance a sustainable and ethical circular economy framework grounded on zero waste approaches that protect human health and environment, to enable the ASEAN region to decouple growth from excessive resource extraction, production, consumption and wastage.

Previous page:

Environmental activists from various groups hold placards during a protest rally against waste trade in Olongapo City, Philippines.
© Greenpeace / Rouelle Umali

This page:

Packaging of everyday household products is found near Port Klang, Malaysia.
© Greenpeace

INTRODUCTION



In January 2018, China, the world's biggest scrap importer, stopped accepting recyclable plastic, unsorted scrap paper, including textile, scrap metals and other materials from abroad, and severely curbed imports of cardboard.

There are two core trends as a result of China's ban: (1) the majority of the plastics were redirected to less-regulated countries/regions – especially Southeast Asia, but also other areas that lack adequate restrictions to

stop oversized imports, or any real capacity to manage the waste; (2) globally, total plastics exports dropped by about half from 2016 to 2018. This left former exporters now sitting with a surplus of waste, unprocessed or processed inadequately³.

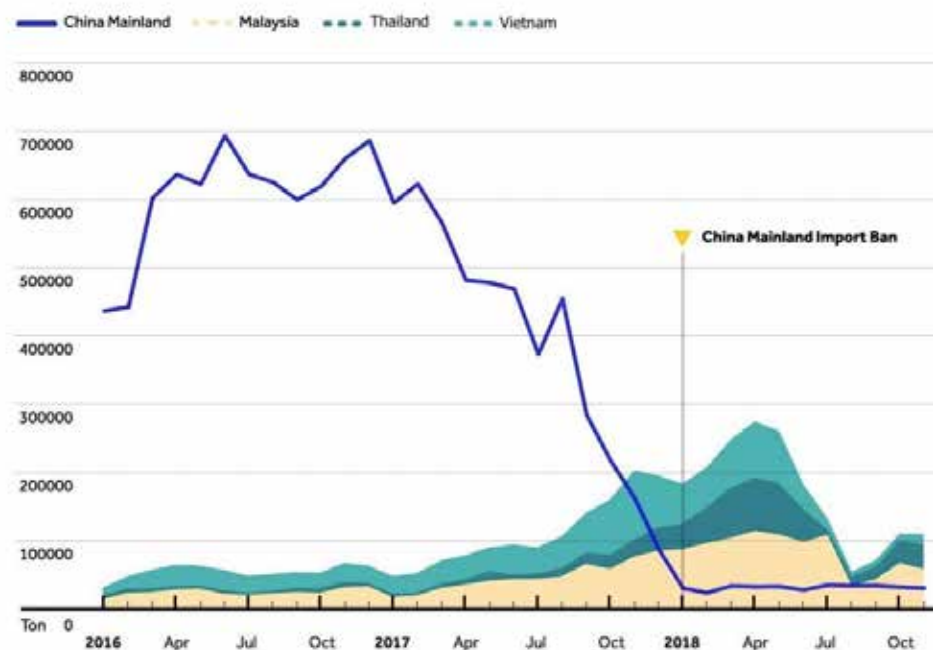
China's USD 24 billion worth of recycled-materials imports are a quarter of the total traded globally, and up from USD 12 billion a decade earlier⁴. USA, the world's biggest exporter of scrap, sent three million tonnes less recovered material to China in the first half of 2018 than 2017, a drop of 38%. Historically, 89% of imports consist of polymer groups often used in single-use plastic food packaging (polyethylene, polypropylene, and polyethylene terephthalate)⁵. It is estimated that 111 million tonnes of plastic waste will be displaced by 2030 as a result of the new Chinese policy⁶.

Research by Greenpeace East Asia, which looked at plastic waste traffic (HS code 3915⁷) between the top 21 exporting and top 21 importing countries/regions, identified Malaysia, Vietnam and Thailand as early destinations for plastic waste, as importers looked for alternatives in anticipation of China's import ban in 2017. By mid-2018 however, these countries had established their own restrictions – with global plastic waste imports from the USA, Germany, UK and Japan being redirected to India, Taiwan, South Korea, Indonesia and Turkey. All these nations saw increasing imports, albeit markedly smaller rises, and the figures do not fully account for the drop in imports to Malaysia, Vietnam and Thailand⁸.

In the first six months of 2017, over 4,000 tonnes of America's plastic went to Thailand. Malaysia experienced a similar increase, a rise of 273% to 157,299 tonnes. Vietnam also saw a significant rise, to 71,220 tonnes in the first six months of 2018⁹.

ASEAN experienced a 171% surge of plastic waste imports (HS 3915) from 836,529 tonnes in 2016 to 2,231,127 tonnes in 2018 (Table 1).

Figure 1. Imports of plastic waste by China, Malaysia, Vietnam and Thailand between January 2016 and November 2018 (in tonnes per month).



Source: Greenpeace East Asia

Table 1. Plastic Waste Import Trends (HS 3915) in tonnes

ASEAN Member States	2016	2017	2018
Malaysia	287,673	549,876	872,797
Thailand	69,487	152,244	481,381
Vietnam	347,840	659,057	492,839 ¹⁰
Indonesia	120,979	128,951	320,452
Myanmar	688	1,855	71,050 ¹¹
Philippines	4,650	4,267	11,761
Singapore	3,354	6,422	9,018
Lao People's Democratic Republic	1,181	3,008	4,791
Cambodia	647	1,685	1,688
Brunei Darussalam	30	116	185
ASEAN	836,529	1,507,481	2,265,962
% Global	5.38%	11%	27%
Global	15,553,548	13,410,919	8,358,867

Source: Trademap <https://www.trademap.org/> Import data accessed 1 June 2019



Previous page:

Packaging from everyday German products - exported as recycling - is discarded at multiple illegal dump sites in Malaysia. © Greenpeace

Whilst investigating the conditions in the Malaysian waste industry, Unearthed finds packaging of familiar UK brands across vast piles of rubbish. © Greenpeace

ASEAN WASTE MANAGEMENT IN PERSPECTIVE

Globally, as of 2015, approximately 6,300 million tonnes (Mt) of plastic waste had been generated, around 9% of which had been recycled, 12% incinerated, and 79% accumulated in landfills or the natural environment. If current production and waste management trends continue, it is estimated that roughly 12,000 Mt of plastic waste will be in landfills or the natural environment by 2050¹².

The ASEAN region can also barely manage its own waste. Key findings from a UNEP (2017) report¹³ on waste management in ASEAN countries show waste generation is increasing. Municipal solid waste among ASEAN members countries is composed of 10-18% plastic.



Per capita, municipal solid waste (MSW) generation in the ASEAN region is 1.14 kg/capita/day. In terms of total annual MSW generation Indonesia generates the highest quantity of municipal waste with 64 million tonnes/year, followed by Thailand (26.77 million tonnes/year), Vietnam (22 million tonnes), Philippines (14.66 million tonnes), Malaysia (12.84 million tonnes), Singapore (7.5 million tonnes), Myanmar (0.84 million tonnes), and Lao PDR which generates the lowest quantity of MSW at 0.07 million tonnes/year.

Organic waste (which comprises more than 50% of total generated) is the highest fraction of MSW in all ASEAN member states except for Singapore, where organic waste accounts for only 10.5% of the total MSW. Other waste streams such as plastic, paper, and metals are also a common sight in MSW piles.



This page:

Packaging of everyday household products is found at a site adjacent to the Wespac recycling factory. Wespac is a leading plastic recycling company located in Malaysia.
© Greenpeace

Greenpeace activists attach the banner saying 'STOP SINGLE-USE PLASTIC' on a barge carrying tons of plastic waste through Manila Bay, to highlight the systemic waste problem that produces massive amounts of plastic pollution in the Philippines. The protest, which happened in Navotas City, Metro Manila, underscored the need for a systemic change in single-use plastic production, consumption, and waste management. © Greenpeace / Arnaud Vittet

ASEAN RESPONSE TO THE INFLUX OF FOREIGN PLASTIC WASTE

As a result of China's ban, a series of contingency measures have been implemented by individual nations to regulate the influx of plastic waste. Following a three-month temporary import prohibition of plastic waste in June 2018, Thailand announced its intention to ban plastic waste imports by 2021¹⁴. Malaysia has stopped issuing new permits for importing plastic waste¹⁵. Vietnam has also stopped issuing new licenses for the import of waste, and has overseen a crackdown on illegal shipments as thousands of containers of paper, plastic and metal scrap built up at the country's ports, raising concerns about the environment¹⁶.

In January 2019, some 6,500 tonnes of South Korean plastic waste, illegally exported to the Philippines, was returned to Korea¹⁷. The Philippines also sent back 69 containers back to Canada¹⁸ while Malaysia will be

returning 3,000 tonnes of waste back to the United Kingdom¹⁹.

In Indonesia, a local NGO has called on the government to review regulations concerning plastic and paper scrap imports. Statistics show that Indonesia plastic waste and scrap imports increased 141% in 2018 compared to 2017²⁰.

The top exporters to the ASEAN region are highlighted in Table 2. By using the total exports, we identified the top five exporters as United States (439,129 tonnes), Japan (430,064 tonnes), Hong Kong (149,516 tonnes), Germany (136,034 tonnes) and the United Kingdom (112,046 tonnes). Other top exporters included Thailand (74,906 tonnes) and Australia (51,057 tonnes).

Table 2. Top exporters HS 3915 to ASEAN (2018). Values in tonnes.

ASEAN Member States	1st Highest	2nd	3rd	4th	5th
Malaysia	United States of America 218,134	Japan 119,010	United Kingdom 112,019	Germany 84,856	Hong Kong 48,384
Thailand	Japan 173,371	Hong Kong 99,932	United States of America 84,462	Australia 25,355	China 19,374
Vietnam	Japan 123,254	Thailand 11,514	United States of America 74,888	South Korea 26,126	Australia 6,357
Indonesia	Marshall Is. 92,682	United States of America 56,753	Germany 50,587	Netherlands 18,892	Australia 18,639
Myanmar	Thailand 61,470	Japan 7,094	Malaysia 868	Australia 707	China 166
Philippines	Japan 2,385	United States of America 1,778	Taiwan 1,704	Indonesia 1,583	Hong Kong 1,200
Singapore	Japan 4,242	United States of America 1,343	Germany 591	Malaysia 591	United Kingdom 523
Lao People's Democratic Republic	Thailand 1,844	Japan 625	United States of America 308	Spain 129	South Korea 76
Cambodia	United States of America 1,463	Japan 84	Thailand 78	China 40	United Kingdom 22
Brunei Darussalam	China 75	Malaysia 42	United Kingdom 5	India 1	Singapore 0.80

Source: Trademap. Import data accessed 1 June 2019

EFFORTS OF ASEAN NATIONS TO REDUCE PLASTIC WASTE GENERATION²¹



Efforts are underway among ASEAN member states to tackle plastic pollution. Several countries are doing this at national and local levels by regulating single-use plastic products and/or packaging, or planning for the elimination of single-use plastic products.

In 2018, Malaysia drafted a roadmap to eliminate single-use plastics by 2030, starting with plastic bag charges and straw bans²². Another ambitious plan, the Plastic Waste Management Road Map 2018-2030, was announced by Thailand in 2019, with the aim to phase out three types of plastics by the end of the year, four other types by 2022, and a plan to use 100% recycled plastic by 2027²³.

Other countries have started initiatives which are less comprehensive, and are voluntary. For example, Brunei Darussalam aims to stop the use of plastic bags in supermarkets by 2019, with shoppers being encouraged to use reusable eco-friendly bags for grocery shopping.

In Cambodia, major supermarkets have begun charging KHR 400 (~USD 0.10) per plastic bag in a bid to reduce usage. Lao PDR is encouraging the public to use recyclable plastic bags sold in downtown cafes and markets. Indonesia and Myanmar have also introduced bans and/or imposed taxes on the use of plastic bags.

Several cities and municipalities in the Philippines have enforced plastic bag and single-use regulations (charges or bans), and bill on a nationwide restriction is being mulled in Congress.

Singapore, one of the world's biggest players in the fast food chain industry, has now banned plastics (i.e., plastic lids and straws) for dine-in customers.

A line of mini-marts and convenience stores in Thailand, with 11,000 operating stores, has recently implemented a 'Say No to Plastic Bag' campaign to uphold policies in line with international environmental standards.

Large businesses and enterprises in Vietnam have also introduced eco-friendly bags to shoppers, with the government imposing an environment tax on plastic bags (VND 40,000 [~USD 1.76] per kilogram).



This page:

Greenpeace UK Oceans campaigner Tisha Brown holds up plastic straws collected during a beach cleanup activity on Freedom Island, Philippines. © Greenpeace / Daniel Müller

ASEAN ACTION PLAN ON MARINE DEBRIS²⁴



Four ASEAN member states are currently reviewing their respective legislations as they work towards an action plan on marine debris. Indonesia is moving to implement a National Marine Debris Action Plan, which commits to reducing plastic waste by 70% by 2025. Vietnam has started developing its National Action Plan on Management of Ocean Plastic Waste. It will also explore legislation and policies related to plastics pollution. The Philippines has already drafted a National Strategy on Marine Litter, which will provide the basis for a Master Plan on Marine Plastics Management. Thailand, as chair of ASEAN 2019, has drafted 'The Bangkok Declaration on Combating Marine Debris'. The government is also exploring options for Extended Producer Responsibility and Public-Private Partnerships (PPP).

This page:

A crab was trapped inside a discarded Zagu milktea cup in Verde Island Passage, the epicenter of global marine biodiversity, in Batangas City, the Philippines. © Greenpeace / Noel Guevara

MOVING TOWARDS A SINGLE-USE PLASTIC-FREE WORLD: GREENPEACE RECOMMENDATIONS FOR ASEAN 2019



ASEAN member states need to act urgently and take a unified, cross border approach. Indeed, with estimates suggesting that 111 million tonnes of plastic waste will have nowhere to go by 2030²⁵, a drastic reduction in plastic production locally, combined with a ban on plastic waste imports is imperative.

1. ASEAN member states should work together to enforce a region-wide ban on all imports of plastic waste, even those meant for “recycling.” They must also ensure all ASEAN countries ratify the Basel Ban Amendment, to prevent cross-border leakage.

Greenpeace advocates for the minimisation and ultimately, an end to the transboundary movement of waste, hence we are calling for a ban on all forms of waste trade. Governments should incentivise and support domestic markets of sorting and recycling plastic waste, taking into account circularity, with existing

recycling capacity being prioritised to treat domestically generated waste.

Aside from enforcing a ban on waste shipments, governments in the ASEAN need to ratify the Basel Ban Amendment. The Basel Ban Amendment²⁶, adopted in 1995, is an amendment to the Basel Convention meant to prevent all waste trade, without exception even for waste labeled for recycling. All 10 ASEAN Member States have ratified the Basel Convention²⁷. However, to date, only three have ratified the Basel Ban Amendment²⁸.

In May 2019, the 14th Meeting of the Conference of Parties to the Basel Convention agreed to include mixed (except mixtures of plastic wastes consisting of PE, PP or PET), unrecyclable and contaminated plastic waste exports into the control regime that requires prior informed consent of importing countries before waste exports can proceed²⁹. This will become effective as of January 2021³⁰.

While the inclusion of plastic waste in the Basel Convention regime will improve the control of some plastic waste trade, forcing the exported waste to be uncontaminated and homogenous, and improve transparency pursuant to Basel Convention reporting obligations, it will not stop the plastic waste trade under the guise of ‘recycling’.

ASEAN Member States should also establish strict enforcement and monitoring of plastic waste trade within the region in order to deter illegal waste trade from taking place to and within ASEAN region, and strengthen cooperation and timely information-sharing to improve transparency.

2. Establish a holistic regional policy geared toward massively reducing the production of single-use plastic packaging and products, and facilitating innovation on reusable packaging and alternative delivery systems;

Even without the influx of plastic waste imports into the region, Southeast Asian countries still face a mounting domestic problem of plastic pollution.

To solve the plastic pollution crisis, ASEAN member states need to prioritise holistic, time-bound national policies that target at-source reduction of single-use plastic. Regulatory instruments such as extended producer responsibility policies are needed to make companies accountable for the whole lifecycle of their products (including packaging), especially on improving the design of their products based on refill and reuse models. Producer-focused regulations, such as mandating companies to be financially responsible for post consumer waste will also help ensure industries reduce plastic pollution at source.

3. ASEAN should advance a sustainable and ethical circular economy framework grounded on zero waste approaches, that protects human health and environment as a way to enable the ASEAN region to decouple growth from excessive resource extraction, production, consumption and wastage.

The lifecycle of single-use plastics, from extraction to disposal and wastage, and the resulting problems of waste trade and pollution, is a signal that the world needs to shift to a more sustainable economic model. Many countries and cities in different parts of the world are already pursuing a new development model – a sustainable circular economy based on zero waste principles.



Zero waste is defined as: “an innovative approach to the use of our resources that ensures ecological and social sustainability. It redesigns the unsustainable ‘business-as-usual’ linear industrial system into a circular system that minimises unnecessary extraction and consumption, reduces waste, and ensures that products and materials are reused or recycled back into nature or into the market. Zero Waste is an integral part of a sustainable circular economy. With its core principles of reduction and redesign to eliminate excessive resource extraction and wastage, Zero Waste systems protect the environment and public health, help communities and cities build robust local economies, generate productive jobs and livelihoods, and help mitigate climate change.”³¹

As a regional body, ASEAN can help advance and promote collaboration toward a zero waste circular economy for the region. The regional grouping offers several platforms where this collaboration can occur. The ASEAN Socio-cultural Community 2025 includes a strategic measure to “promote the integration of Sustainable Consumption and Production strategies and best practices into national and regional policies”³². The ASEAN Economic Community 2025 Consolidated Strategic Action Plan identifies ways in which Member States can “promote green development” through a sustainable growth agenda that, among others, “enhances sustainable consumption and production”³³. Zero waste approaches can be built into these and other strategies to enable the region to transition away from the business-as-usual linear economic system.

At the same time, there needs to be a multi-dimensional approach to tackle the plastic pollution crisis. Greenpeace cautions against the following short-term fixes which could hinder the transition to a sustainable zero waste circular economy:

- Incineration, including thermal “waste-to-energy” schemes or waste processed as “fuel”;
- Chemical recycling of plastic waste;
- Disposal in landfills, as well as recycling – these should only be interim measures while reduction (through reuse and refills) are mainstreamed.

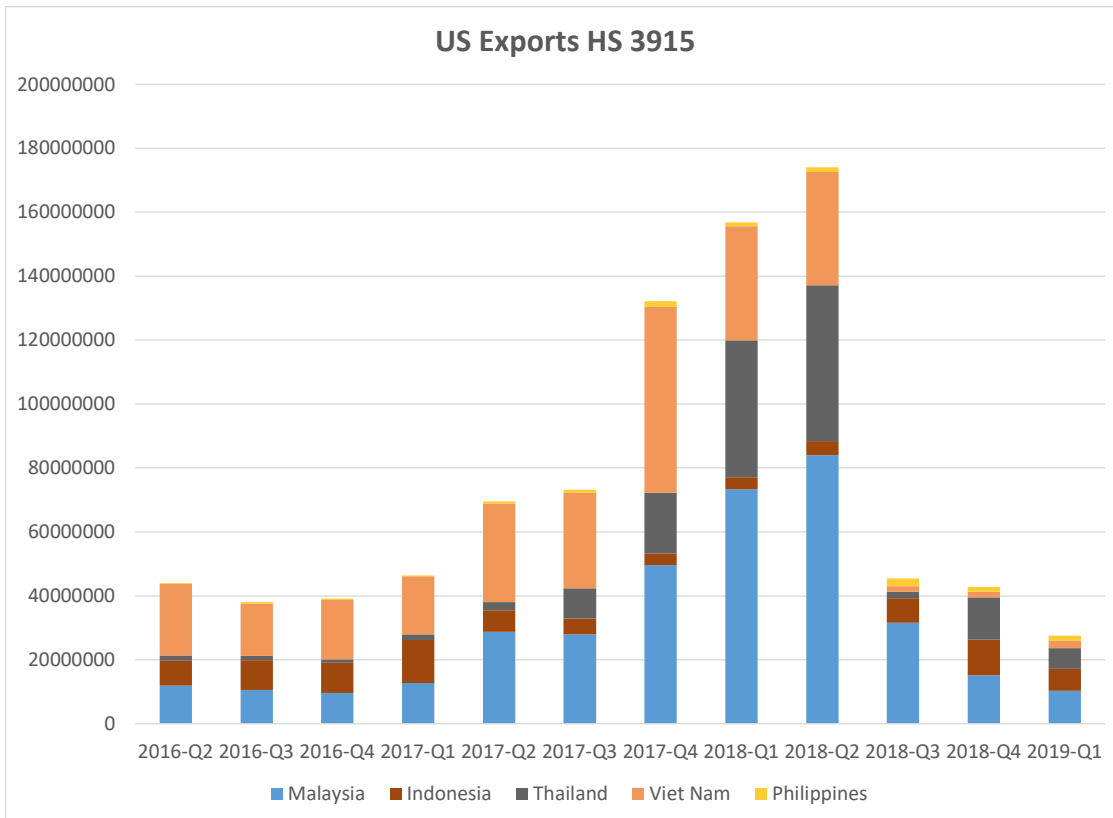
Previous page:

Activists from Break Free from Plastics coalition collecting rubbish during the action in Werdhapura beach, Sanur, Bali. They urge the eleven biggest Fast Moving Consumer Goods (FMCG) brands to stop producing single-use plastic packaging. © Greenpeace / Jurnasyanto Sukarno

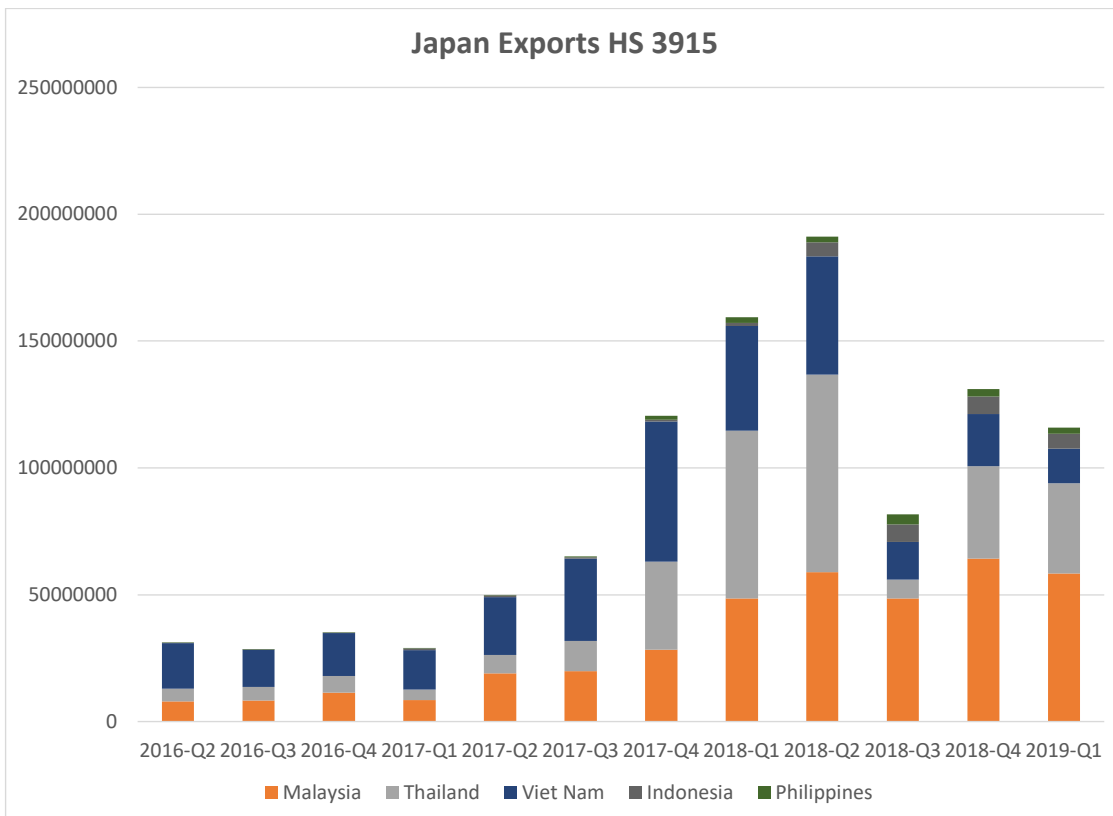
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Greenpeace together with the #breakfreefromplastic coalition conduct a beach cleanup activity and brand audit on Freedom Island, Parañaque City, Metro Manila, Philippines. The activity aims to name the brands most responsible for the plastic pollution happening in our oceans. © Greenpeace / Daniel Müller

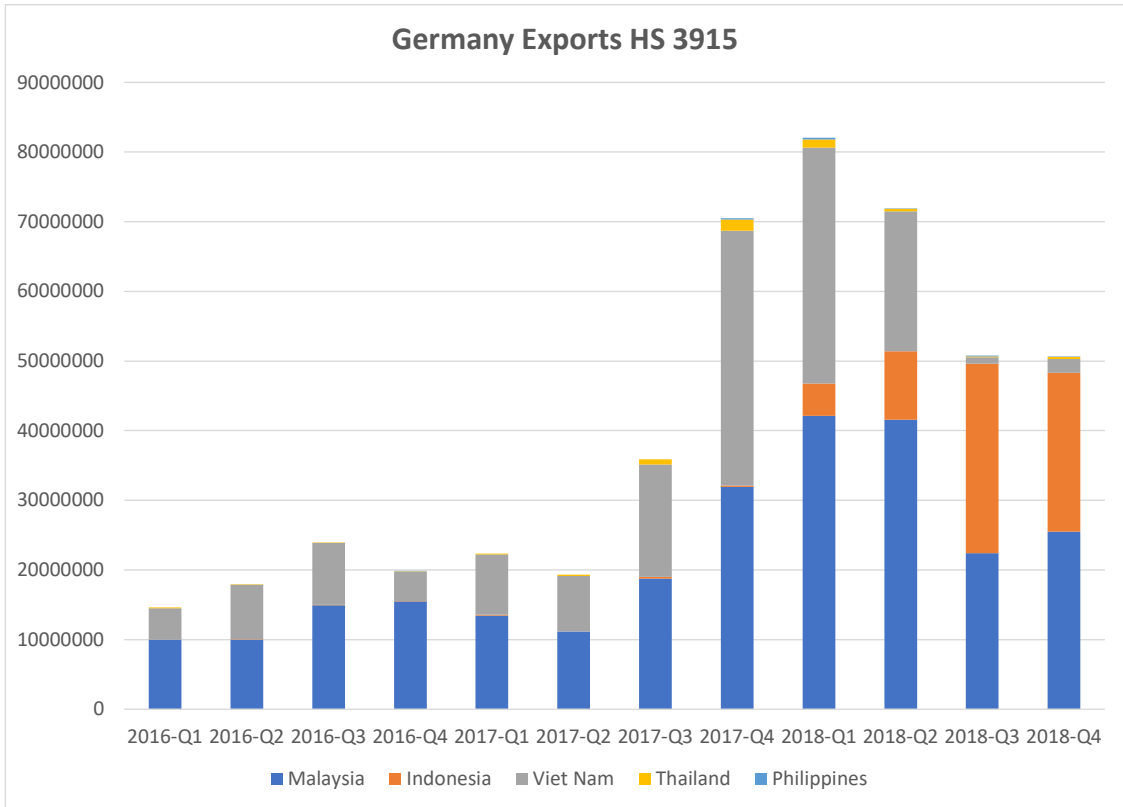
ANNEX A
**TOP GLOBAL EXPORTERS OF PLASTIC WASTE
 BY ASEAN DESTINATIONS (IN KILOGRAMS)**



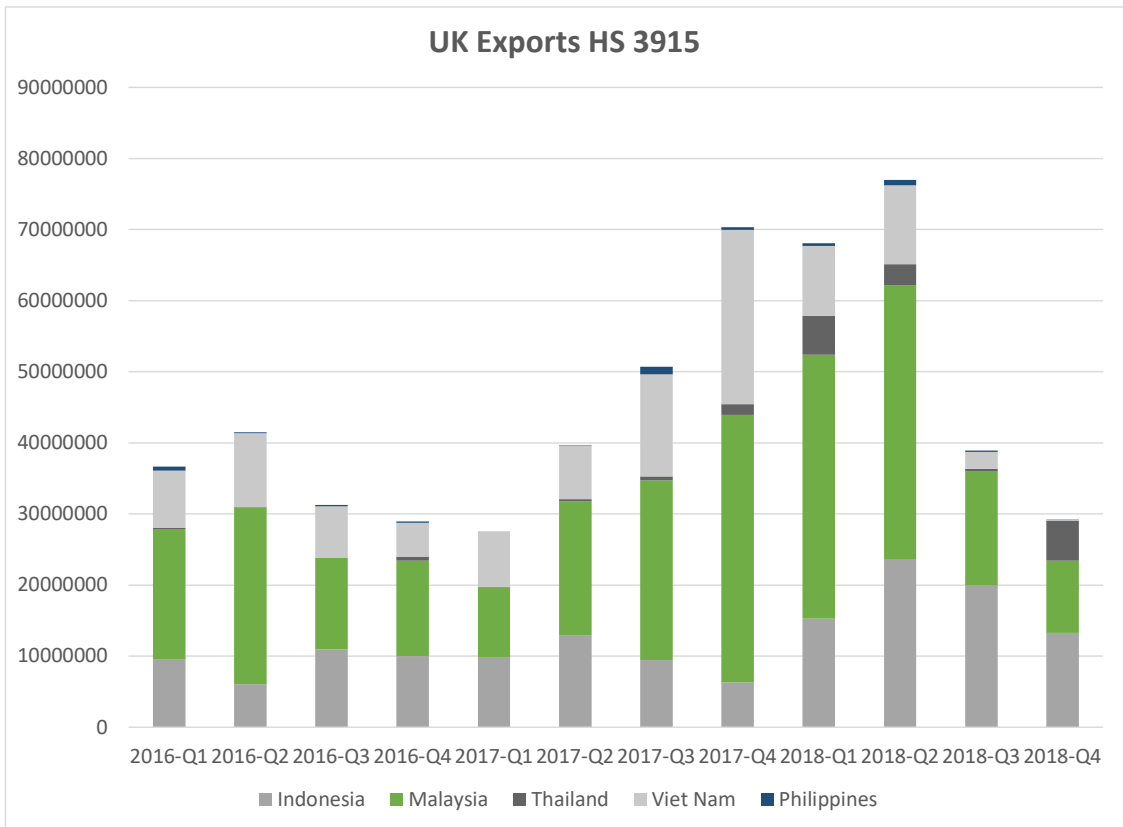
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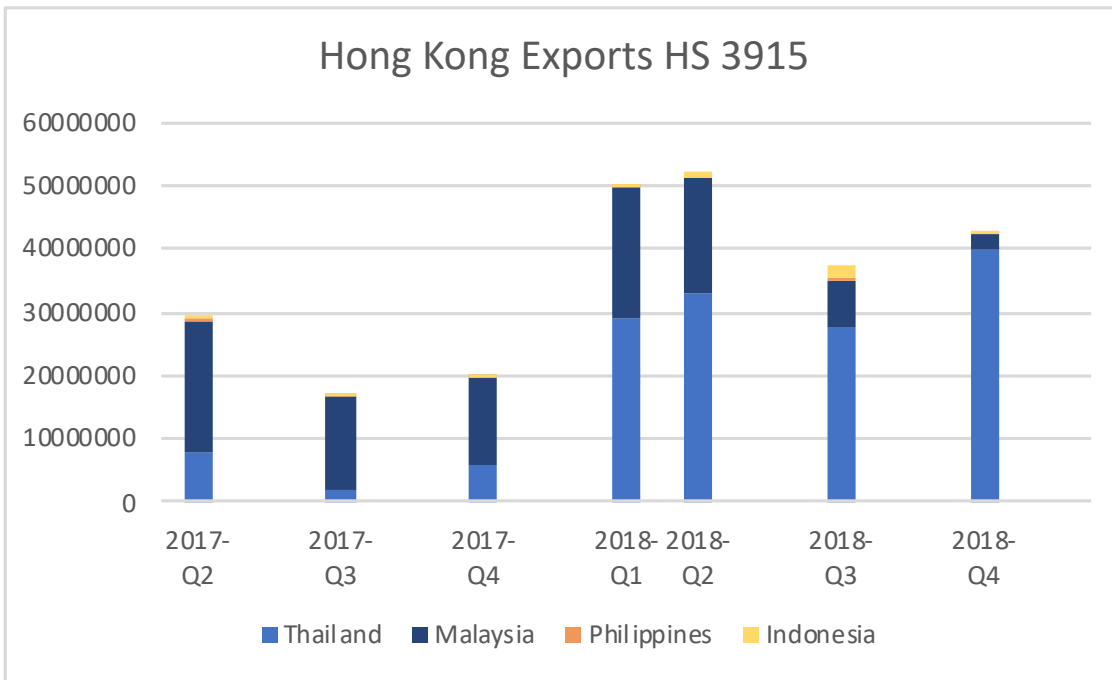
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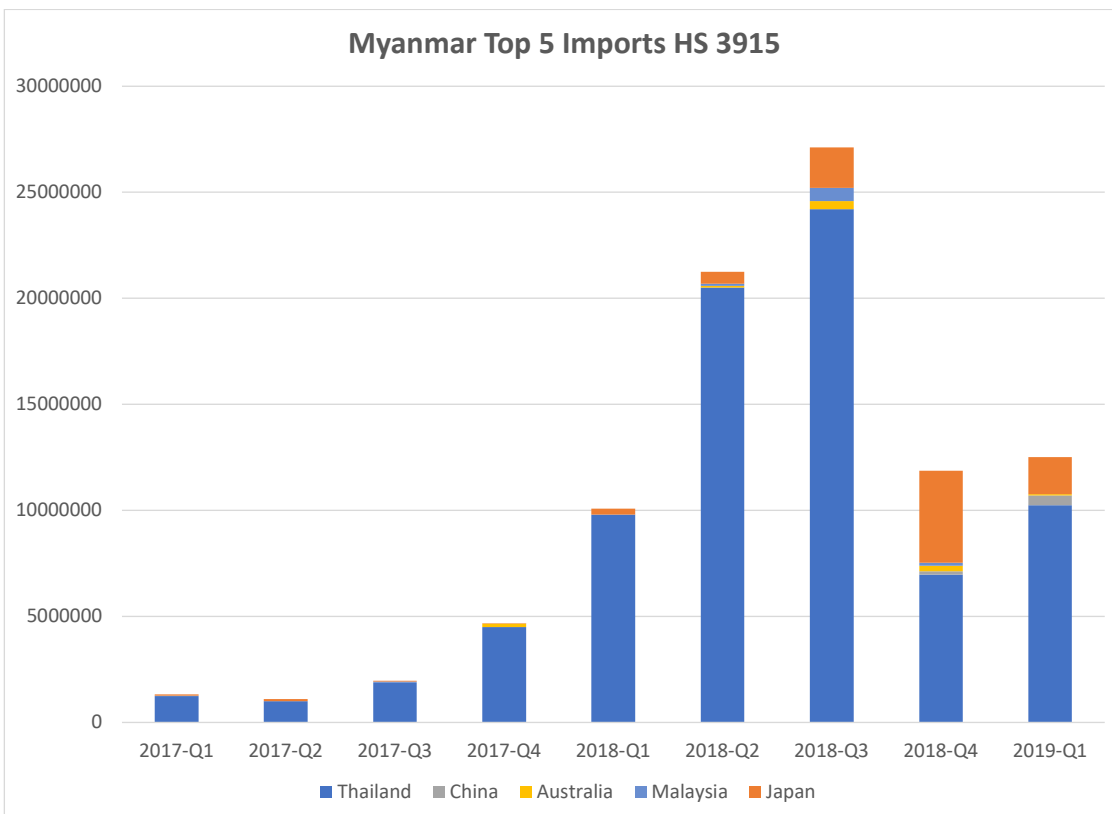


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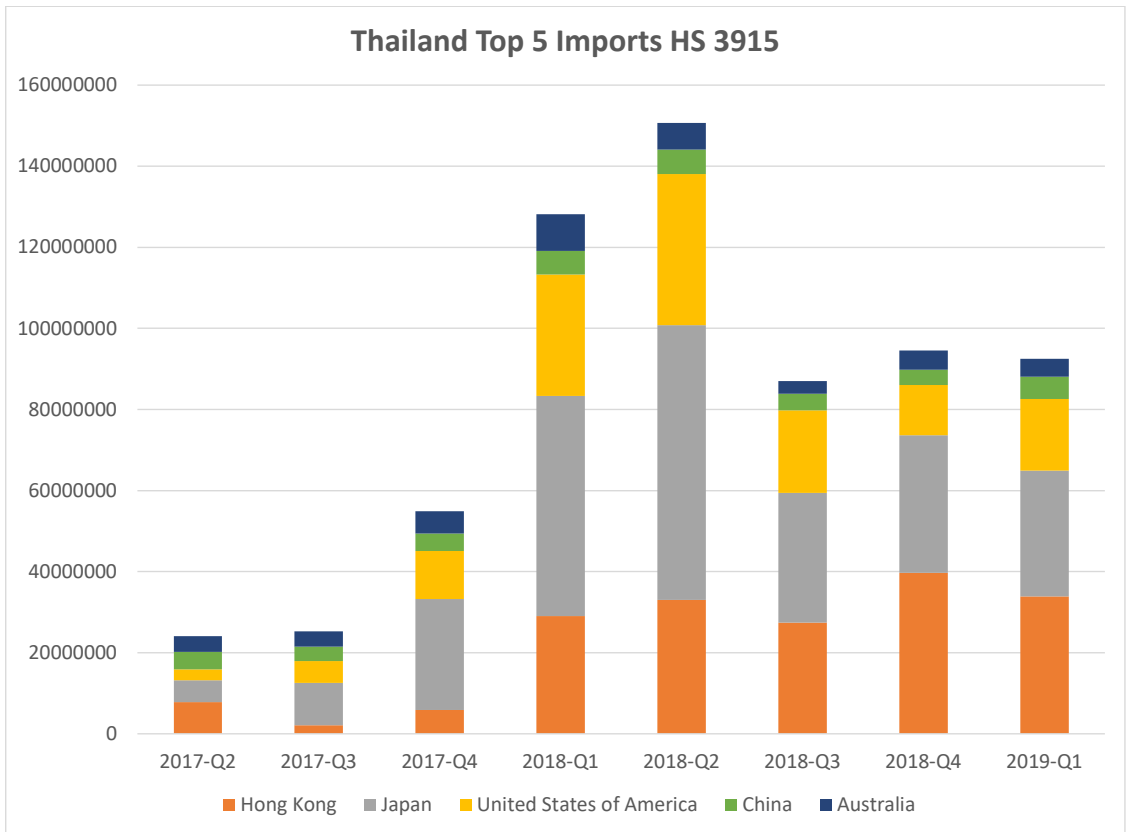


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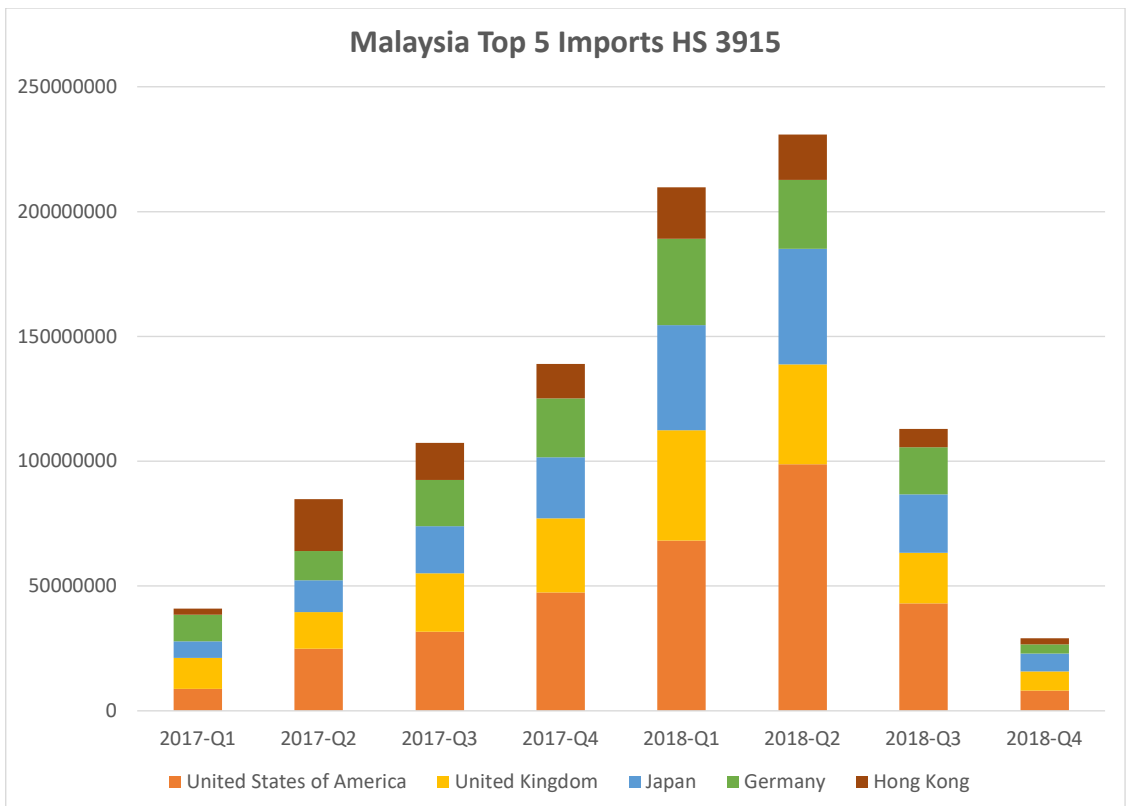
ANNEX B TOP IMPORTERS IN ASEAN BY COUNTRIES OF ORIGIN (IN KILOGRAMS)



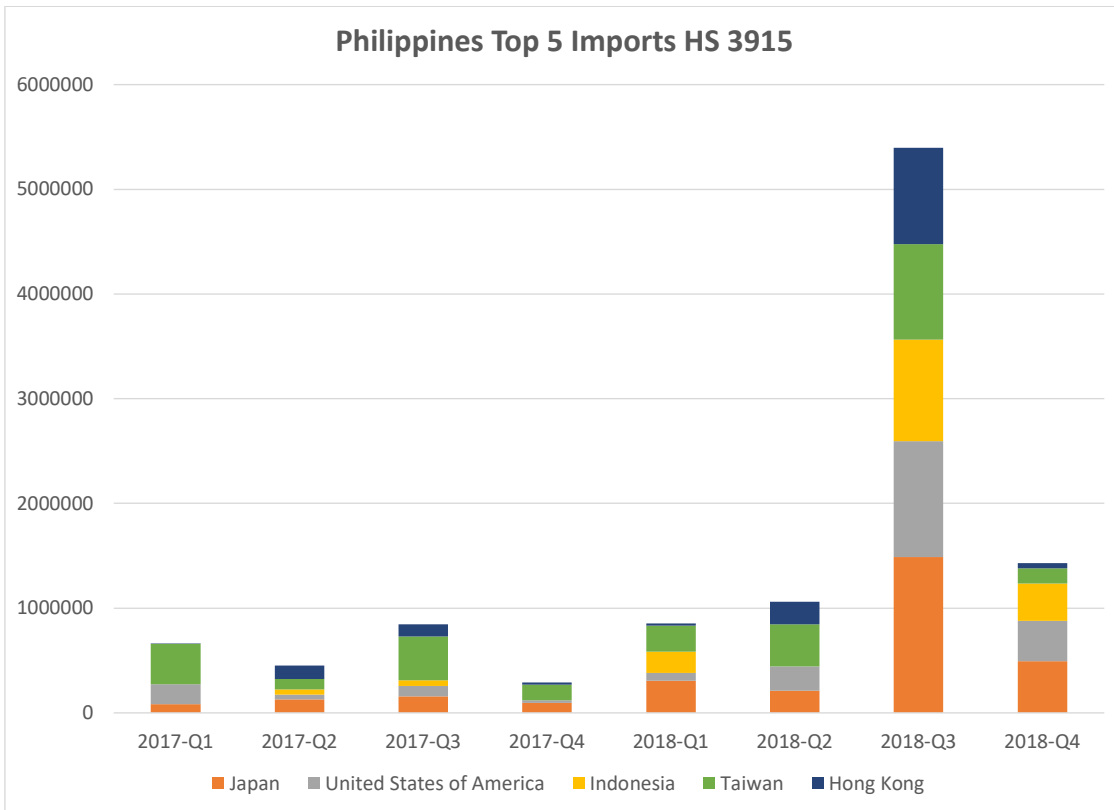
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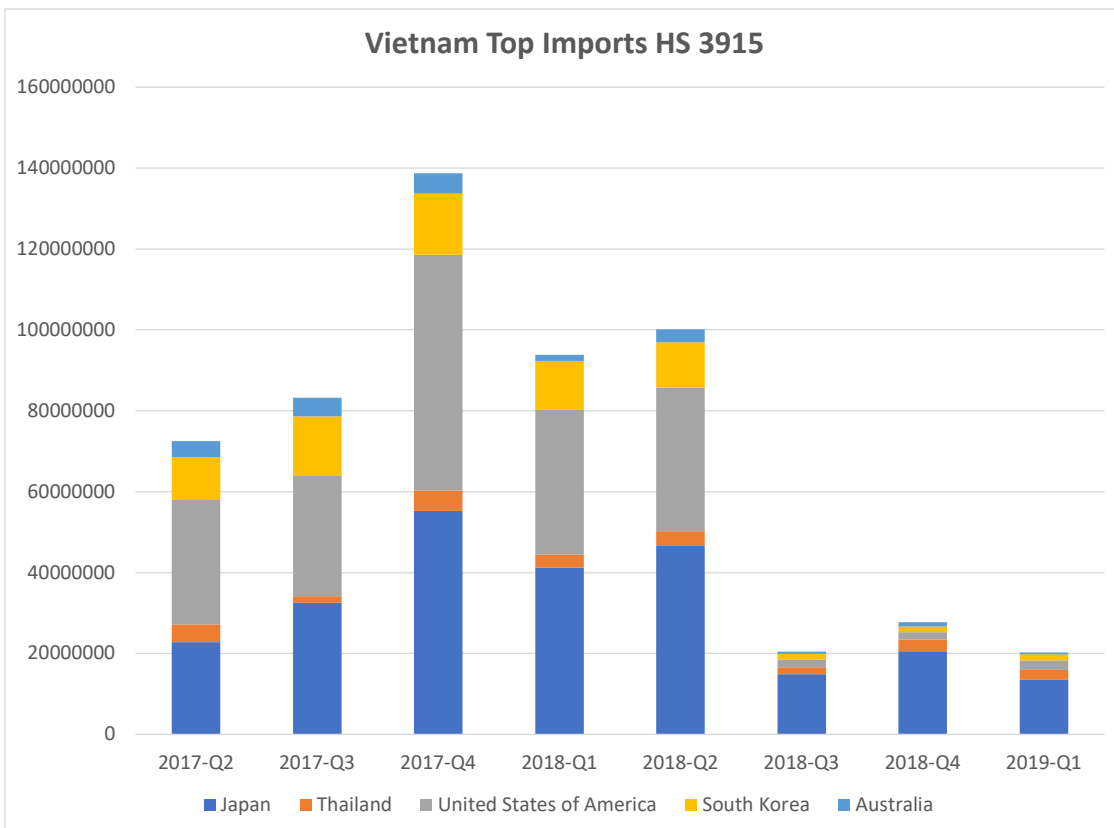
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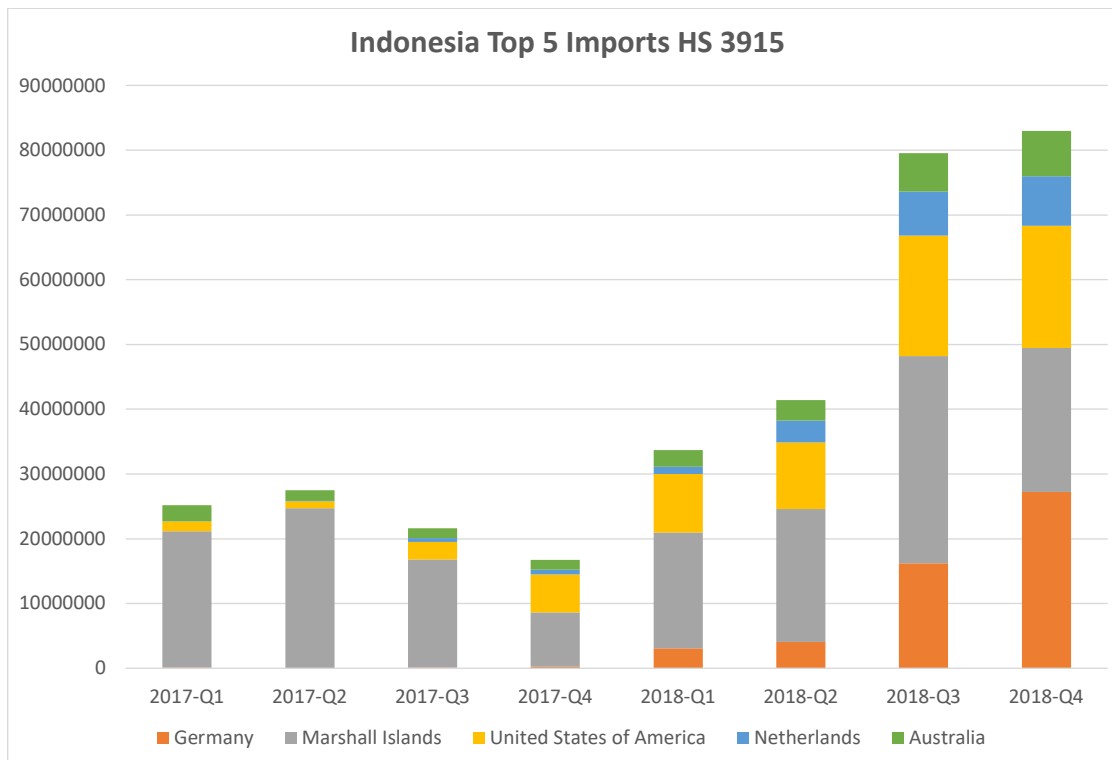
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Exports (tonnes) to ASEAN by country 2018	TEU - Twenty Foot Equivalent Unit (1 tonne = 5.35 TEU)	Large Container Ship (contain around 18,000 TEU)
United States - 439,129	82,080	4.56
Japan - 430,064	80,386	4.47
Hong Kong - 149,516	27,947	1.55
Germany - 136,034	25,427	1.41
United Kingdom - 112,019	20,938	1.16
Others - 999,200	186,766	10.38
Total - 2,265,962	423,544	23.53

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Cover image:

Greenpeace Malaysia has been conducting a field investigation on the broken system of recycling and how it impacts Malaysian society. The findings were shocking: a new 'dump site' of plastic waste from more than 19 countries – most of them are developed countries. The investigation found illegal practices, and blatant violations causing environmental pollution as well as harming people's health conditions. © Greenpeace / Nandakumar S. Haridas

