7 Putting the Global Ambition into context: Challenges and priorities

Stringent policy packages implemented globally can facilitate the transition towards a world free of plastic pollution. This chapter discusses challenges and priorities ahead for policymakers in the implementation of policies along the lifecycle of plastics. The chapter also looks at the research efforts that are required to close knowledge gaps and to ensure adequate means of implementation in all countries.

7.1. Introduction

As presented in the previous chapters, global ambition via the implementation of stringent policies across the world and targeting multiple stages of the lifecycle (as modelled in the *Global Lifecycle High stringency* [*Global Ambition*] scenario) could deliver large benefits for the environment, as well as for human well-being. However, the realisation of these benefits rests on the assumption that a number of barriers are overcome. This chapter discusses challenges and priorities ahead for policymakers in the implementation of the four pillars, including policy instruments to curb production and demand and foster eco-design, and policies to enhance recycling and close leakage pathways. The chapter also looks at the research efforts that are required to close knowledge gaps, such as regarding microplastic pollution and the related mitigation measures, and to ensure adequate means of implementation for the successful introduction of stringent policy packages in all world regions.

7.2. Accelerate action to slow plastic flows and foster eco-design

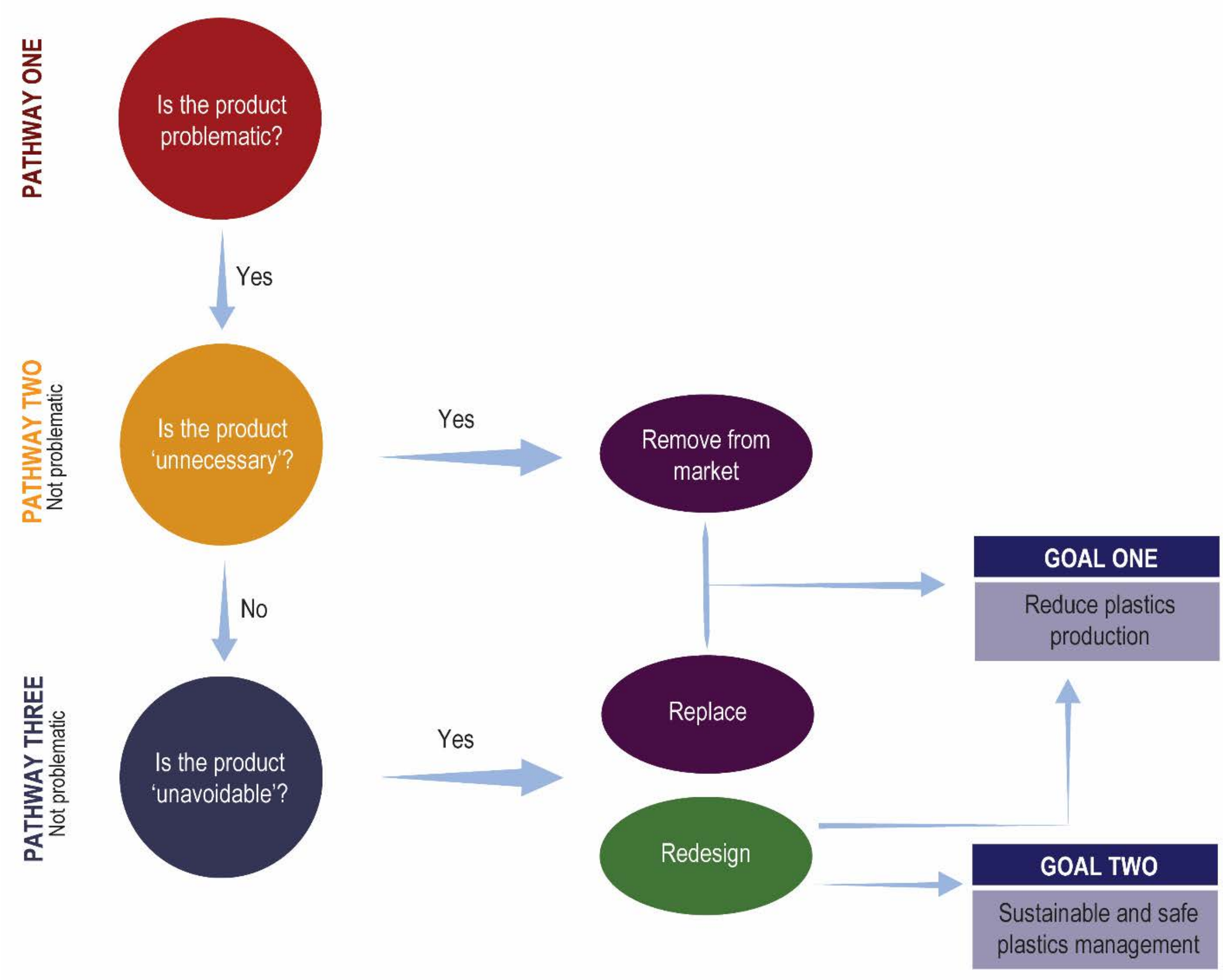
As part of an overall containment of plastics production and use, the *Global Lifecycle High stringency* [*Global Ambition*] scenario would see a dramatic reduction in plastics demand for packaging applications, which is expected to grow by 70% by 2040 in the *Baseline* scenario. Structural changes in the economy will be required in order to achieve significant reductions in plastics demand, for instance to shift from single-use applications to reuse systems. The stylised policy package of the *Global Lifecycle High stringency* [*Global Ambition*] scenario modelled in this report assumes that all countries are capable of and willing to implement taxes on plastics production or use. As also discussed in Chapter 1, to accommodate specific country circumstances, taxes could be avoided if other instruments are found to be equally effective in incentivising a reduction in plastic flows.

7.2.1. Harmonised standards would support the removal or phase down of problematic plastics and the eco-design of plastic products

The identification and gradual removal of avoidable and problematic plastics can play an important role in reducing waste mismanagement and leakage, as well as reducing concerns for human health. More than 140 countries have banned or restricted selected plastic products and packaging, often single-use plastic applications that are known to be particularly prone to littering and leakage to the environment. However, additional efforts are required to identify unsafe plastic items, polymers and additives, as well as to develop solutions that avoid possible unintended risks of substitution. Raubenheimer and Urho (2024[1]) have proposed potential criteria based on a determination of the function or end-use of a product, and whether it is deemed essential or not, as summarised in Figure 7.1.

Incorporating circularity considerations in product design is essential to prolonging product lifespans and to enabling safe reuse, improved repairability, as well as higher recycling rates. However, rethinking product design can present technical and economic barriers. Governments should consider policy frameworks that promote design for circularity and facilitate the adoption of supportive business models.

Figure 7.1. Decision hierarchy for determination of problematic, unnecessary and avoidable products



Source: Adapted based on (Raubenheimer and Urho, 2024[1]).

7.2.2. Strong incentives, infrastructural investments and harmonised standards could facilitate the scale-up of reuse systems

Reuse systems offer the promise of reducing plastics demand and waste generation, especially of short-lived plastics applications. Broadly defined, these systems are designed to enable multiple circulations of an item, typically packaging. The consumer benefits from the service provided by the item, e.g. the provision of packaged meals, and then returns it to the provider. As items intended for reuse are generally more resource-intensive than single-use alternatives and dedicated infrastructure and maintenance is required (e.g. washing), the certainty of multiple uses is essential to securing environmental benefits.

While reuse can be implemented in closed loop systems, it is most effective when implemented at scale. To this end, collaboration between industry and different levels of governments is essential to establishing coherent policy frameworks around reuse. Public incentives for reuse and innovation can play a pivotal role in facilitating the expansion and integration of these models on a larger scale, including to incentivise investments in the infrastructure required. Reuse systems must be designed to fit the specific needs of each sector and socio-economic context. At the international level, developing clear definitions of reuse and harmonising criteria could help to establish a clear and enforceable framework, discourage fragmented approaches and foster investments into reuse models.

7.3. Support environmentally sound waste management in all regions

7.3.1. Technical and financial support is required to set up systems for waste collection around the world

As discussed in Chapter 5, progress towards ending plastic pollution will require significant improvements in waste collection and sorting, especially in developing countries. Many low- and middle-income countries tend to have lower use and waste generation levels, in per capita terms, compared to high-income countries. However, they tend to have less-developed waste collection and management services, often with the persistence of practices such as open dumping and burning that exacerbate environmental and human health concerns. Governance challenges as well as limited financial resources currently hinder the rapid development of effective waste management infrastructure in these contexts.

To support the expansion of efficient collection and sorting systems in all world regions, policies such as EPR schemes and waste collection targets have proven to be effective. Improvements in the collection, sorting and treatment of plastic waste are expected to be part of general enhancements in waste management, beyond targeting plastic materials and waste. As waste collection often relies on informal waste pickers, solutions that ensure the integration of the informal sector would help to achieve the high collection rates set out in the *Global Lifecycle High stringency* [*Global Ambition*] scenario, while also mitigating human health concerns for workers and ensuring a just transition. As discussed in the previous chapter, restraining demand for plastics can play a pivotal role in containing the costs of waste collection.

7.3.2. Major technical breakthroughs may be required to achieve the significant improvements in recycling envisioned in the high ambition scenarios

The *Global Lifecycle High stringency* [*Global Ambition*] scenario projects a near-total elimination of mismanaged plastic waste and a major shift to recycling in the end of life treatment of plastics, to cover 42% of waste generated in 2040 (Figure 7.2). This would correspond to a quadrupling of the average global recycling rate for plastics (from 9.5% in 2020).

Currently, both available recycling technologies and the availability of scrap limit the expansion of the transition to secondary plastics. The challenges of mechanical recycling of post-consumer plastic waste vary across waste streams. They include the availability of recycling infrastructure for certain types of plastics (such as for PET), the possible presence of hazardous additives, as well as the need for dismantling operations for complex waste streams (such as those treating electronic and electric equipment) (Landrigan et al., 2023[2]). Achieving the outcomes of the *Global Lifecycle High stringency* [*Global Ambition*] policy scenario will require strong improvements in recycling and reductions of recycling losses (Box 7.1). Scaled investments in recycling technologies, combined with upstream and midstream interventions (including improved design for recycling), are required to expand the sources of viable feedstock for mechanical recycling.

Box 7.1. Not all plastics collected for recycling are recycled

Plastic waste that is collected for recycling frequently includes some non-plastic materials. Moreover, collected plastic waste typically includes a multitude of plastic items and fragments with varying chemical and physical compositions. The degree to which what is collected is useful to plastics reprocessing depends on a range of factors. In general, high income countries implement recycling collection schemes that are designed to yield high material mass through an accessible and simplified system that is easy for people to understand. Conversely, in many low- and middle-income countries, separate waste collection for recycling is carried out by informal workers who selectively collect the most valuable items and objects from waste streams, focusing on quality and concentration rather than high yield. Even with diligent, selective collection, plastic articles contain a multitude of intentionally and non-intentionally appended, entrapped, adhered and entrained materials and objects that must be removed from the dominant plastic before it can be reprocessed.

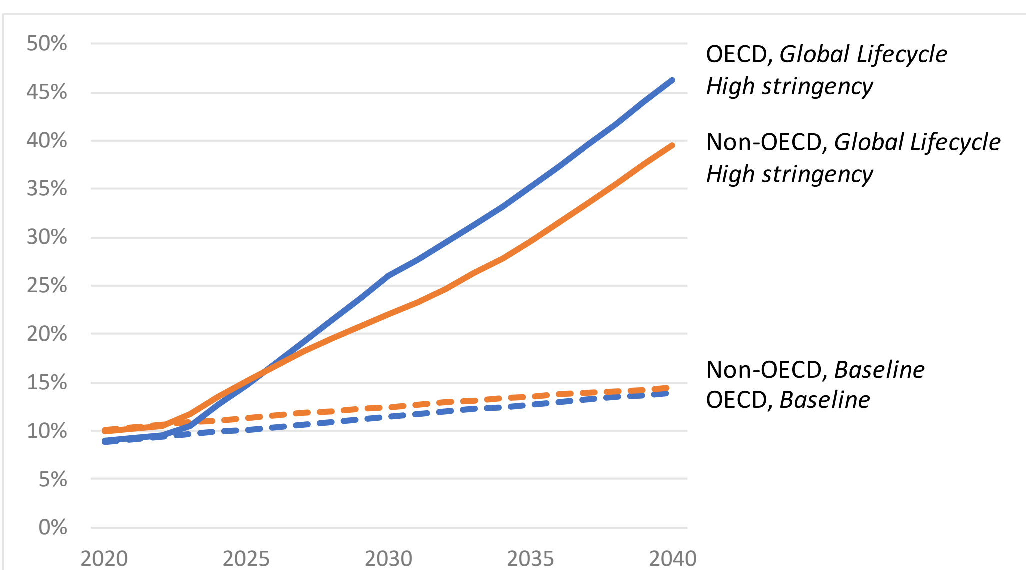
The estimates and projections presented in this report for the category "recycled plastic waste" refer to plastic waste that has effectively been recycled, i.e. net of recycling losses.

Source: (OECD, 2022[3])

The *Global Lifecycle High stringency* [*Global Ambition*] scenario relies on the assumption that high recycling rates can be attained for all waste streams and polymers, including those that are barely recycled at present, via mechanical recycling technologies.[1] This implies that major technical breakthroughs may be required to enable the large-scale switch from primary to secondary plastics for all polymers and achieve the consequential reductions in environmental impacts. Should these substantial technical breakthroughs fail to materialise, meeting the ambitions of the policy package will require heightened ambition in other parts of the policy package, for instance via induced reductions in the use of hard-to-recycle polymers or more significant reductions in plastics demand.

Figure 7.2. Global Ambition requires significant technological advancements in recycling

Average global recycling rate



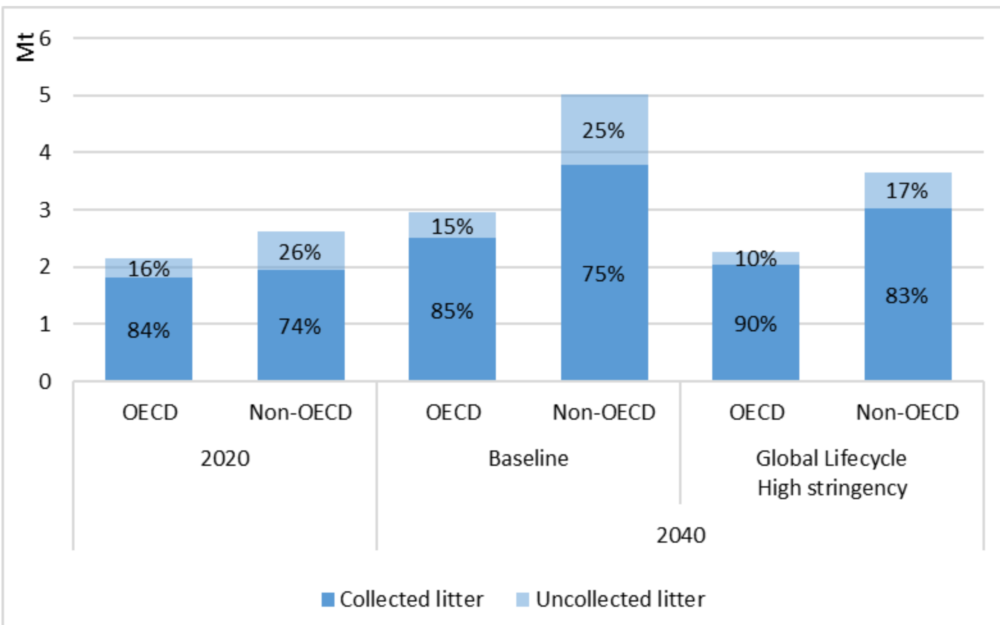
Note: The recycling rate expresses the percentage of total waste generated in a given year, that is recycled into secondary plastics.
Source: OECD ENV-Linkages model.

StatLink https://stat.link/zsxw72

In addition, reducing the volume of littered waste (i.e. waste that escapes collection, either because it is littered by individuals or due to fly-tipping) is an important action for reducing leakage to the environment. It is likely impossible to collect all littered waste via municipal collection, but the *Global Lifecycle High stringency* [*Global Ambition*] scenario assumes a significant increase in litter picking rates and street sweeping in all regions, beyond the improvements in this area already assumed in the *Baseline* scenario that stem from increased income levels (Figure 7.3). The required increases are especially high in Africa and India, where litter collection rates in 2040 are assumed to rise from 65% in the *Baseline* scenario to 75% in the *Global Lifecycle High stringency* [*Global Ambition*] scenario. Globally, the avoided leakage from improved litter removal is projected to be more than 1.2 million tonnes (Mt) by 2040.

Figure 7.3. Global Ambition requires strong improvements in the municipal collection of littered waste

Collected and uncollected litter in million tonnes (Mt)



Source: OECD ENV-Linkages model.

StatLink https://stat.link/bj08g2

7.4. Further research is required to better inform action on microplastic leakage and the need for remedial action

Microplastic pollution is an emerging threat to ecosystem and human health. Due to data and information limitations, the *Global Lifecycle High stringency* [*Global Ambition*] scenario includes only a limited set of policies specifically targeting microplastic leakage, such as bans on the intentional addition of microplastics during the manufacture of cosmetic and personal care products. Reductions in microplastic leakage in this scenario would largely stem from reductions in overall plastics use or from expected improvements in end-of-pipe capture (e.g. wastewater treatment). Reductions in macroplastic leakage could also mitigate the generation of microplastics from the degradation of plastics polluting the environment.

Although not considered in the model, policies that can specifically mitigate the leakage of microplastics will also need to form an important part of the policy mix in order to ensure the effective mitigation of microplastic pollution. Further research is necessary to evaluate the cost-effectiveness of possible mitigation options and inform the choice of policy interventions. Despite existing knowledge gaps, significant progress can be achieved in the short term by focusing on mitigation options that generate co-benefits aligned with other environmental policy objectives, such as policies for climate change mitigation and improvements in air quality and water quality that also contribute to reducing microplastic leakage, such as reductions in road transport volumes. Other sources of microplastic leakage should also be investigated to broaden our understanding of the magnitude of the problem and the possible solutions.

Further research could also help to inform remedial interventions that may be required to reduce risks to the environment and human health. As discussed in Chapter 5, legacy plastic pollution and additional contributions that would still be expected between 2020 and 2040 would lead to an amplification of plastic pollution. Stocks of macroplastics in rivers and oceans, often taken as a proxy for plastic pollution, would rise from 152 Mt in 2020 to 226 Mt in 2040 in *Global Lifecycle High stringency* [*Global Ambition*] scenario (74 Mt less than in the *Baseline* scenario). In addition to the policy interventions envisioned in the *Global Lifecycle High stringency* [*Global Ambition*] scenario, remedial interventions would have an important role to play in mitigating risks to ecosystems and human well-being, especially in developing countries most affected by plastic pollution. Clean-up interventions, such as interventions targeted at hotspots and citizen clean-ups, may also help to gather data on environmental pollution and to inform policy efforts. At the same time, specific attention should be paid to the environmental impacts of clean-up interventions, especially in the case of novel technologies. Plastic clean-up technologies can play an important role in reducing litter in the environment; however, there are concerns that unregulated clean-up technologies may be inefficient and have unintended negative consequences on ecosystems, for example, through bycatch or removal of organic matter important for ecosystem functions (Falk-Andersson et al., 2023[4]).

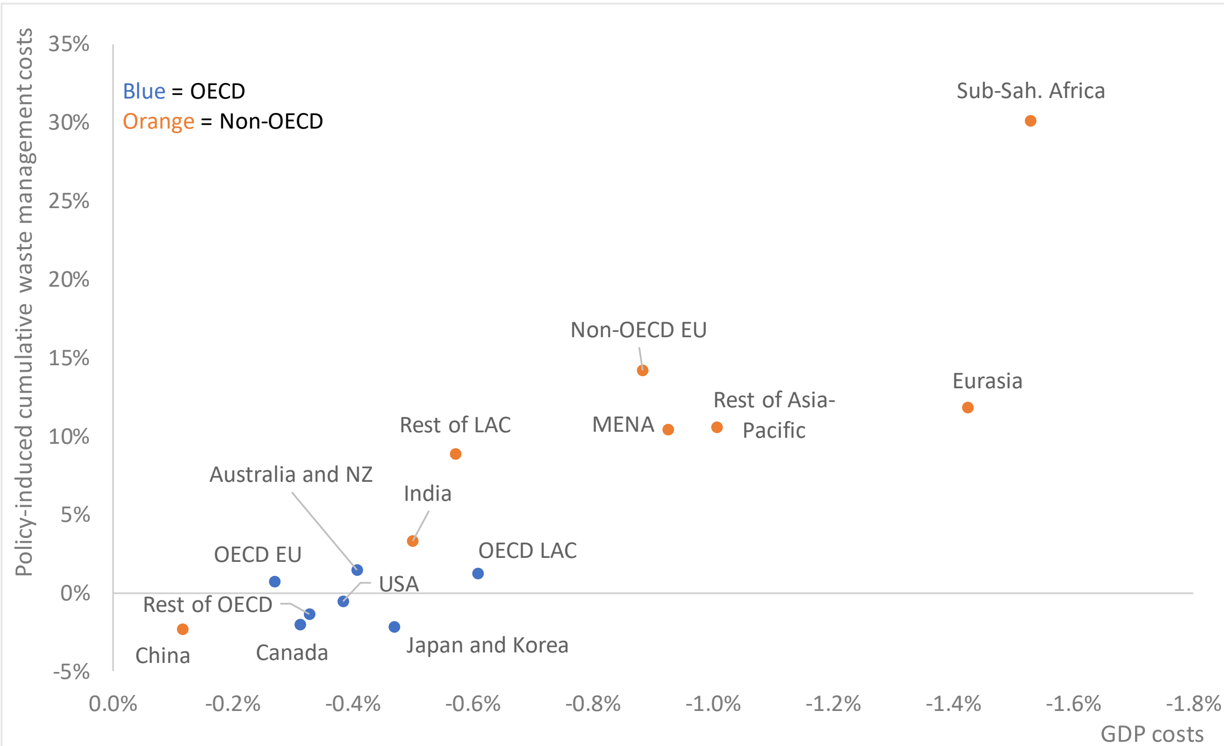
7.5. Means of implementation and financing

While more ambitious policy action is needed in all countries to help move from a linear to a circular plastics economy and effectively end plastic pollution, it is important to recognise that a heavier burden is placed on many developing countries in order to achieve these objectives, including small island developing states. These countries often exhibit fast growth in plastics use (including in sectors that are pivotal for development, such as transport and infrastructure) and high levels of waste mismanagement. Concurrently, they can be particularly vulnerable to plastic pollution and the associated risks, especially when they rely heavily on sectors such as fisheries and tourism. This specific context underscores the critical role of developing countries in the global fight to end plastic pollution.

The benefits of the transition to plastic pollution-free economies is likely to benefit all countries, but the projected economic costs of the transition are uneven across world regions. As discussed in Chapter 6, the macroeconomic costs are larger for developing countries than for developed countries in all policy scenarios modelled, except the *Global Lifecycle Low stringency* scenario (where the costs are small and in relative terms roughly equal across countries) and in the *Advanced economies Lifecycle High stringency* scenario (where developing countries don't implement any new policies at all). In the *Global Lifecycle High stringency* [*Global Ambition*] scenario, eliminating macroplastic leakage would incur macroeconomic costs of approximately 0.5% of global GDP by 2040, compared to the *Baseline* scenario. However, Sub-Saharan Africa is expected to experience the largest macroeconomic impacts, reducing its GDP by 1.5% below the *Baseline* scenario, mainly due to the high additional waste management costs (Figure 7.4; see Chapter 6 for more details). In the *Baseline* scenario, waste management costs are relatively low in Sub-Saharan Africa, and the increase in collection activity and a transition towards more recycling comes with significant additional costs. Reduced costs associated with modelled measures to slow plastics use and waste generation (under the pillars to curb production and demand and to design for circularity) cannot fully compensate for the additional waste collection and treatment costs.

Figure 7.4. Costs to eliminate leakage are unevenly distributed across world regions

Distribution of economic costs (change in GDP) of implementing the policy scenario and policy-induced cumulative waste management costs by region, both in percentage changes compared to the *Baseline* in 2040, *Global Lifecycle High stringency* [*Global Ambition*] scenario



Source: OECD ENV-Linkages model.

StatLink https://stat.link/mxr0v7

7.5.1. Ensure that adequate financing of waste collection and treatment is available to all countries, in parallel to support for solutions that may contribute to waste prevention

The burden of policies and investments required falls more heavily on developing countries, especially those that currently have less advanced waste management systems. In the *Baseline* scenario, the largest increases in plastics use (and waste) are projected to occur in non-OECD economies already characterised by high rates of waste mismanagement and leakage to the environment. As a consequence, regions such as Sub-Saharan Africa, the Middle East and North Africa, are projected to represent an increasing share of global mismanaged waste over time, as the relatively rapid growth of plastics use and waste in these areas would outpace projected improvements waste management systems.

It is well known that continued increases in plastic leakage would amplify adverse impacts on biodiversity and ecosystems as well as on local communities in these countries, for instance due to increased risks of floods or negative impacts on ocean-based economies. Plastics do not biodegrade in natural conditions, however they may fragment into microplastics that are difficult to recover once in the environment and that may increase exposure pathways and risks for wildlife and humans. The remainder of mismanaged waste is expected to end up in dumpsites or to be burned informally, also with adverse consequences for local communities and human health.

A scaling-up of infrastructural investments is required to eliminate plastic leakage globally, but in particular to enhance waste management in developing countries that currently rely heavily on informal waste management practices and where waste collection rates remain low. Investment needs for waste management systems in non-OECD countries would amount to more than USD 1 trillion over a 20-year period in the *Global Lifecycle High stringency* [*Global Ambition*] scenario.[2]

Given the crucial contribution of developing countries to ending plastic pollution, this requires adequate development financing, including potentially a re-orientation and scale-up of Official Development Assistance (ODA). ODA aimed at curbing plastic pollution has been on the rise in recent years, reflecting the growing public consensus around the severity of the problem and the need to act (Box 7.2). However, ODA alone remains largely insufficient when compared to the cumulative investment needs across world regions to tackle plastic pollution. New approaches to fill the financing gap and mobilise more resources include i) supporting initiatives to scale up total resources available to curb plastic pollution in developing countries, including from the private sector; ii) enhancing global targeting of existing resources and their alignment to country needs and priorities, iii) adopting international good practices and fostering innovation and iv) promoting mutual learning and developing guidance for more effective development co-operation (Agnelli and Tortora, 2022[5]).

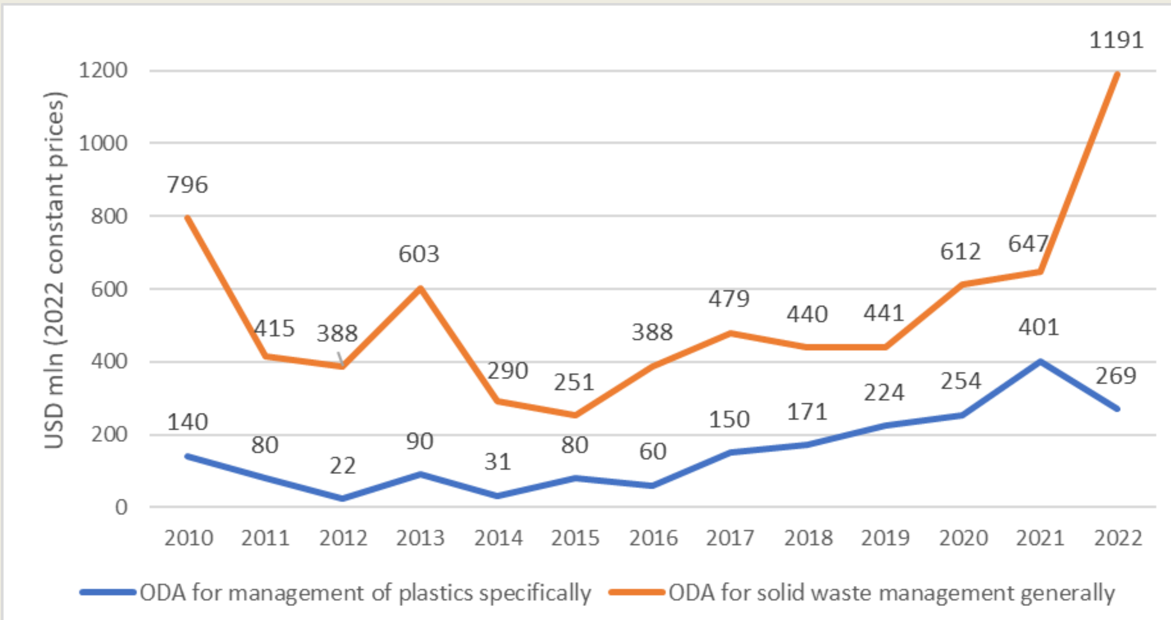
It is essential to establish reliable and sustainable revenue streams to pay for the operation of these improved and expanded waste management systems. For instance, the establishment of EPR schemes in developed countries has proven to be effective to help cover the costs of separated waste collection, sorting and recycling. In the case of developing countries, the design and implementation of EPR schemes should effectively involve the informal sector, in particular waste pickers.

Box 7.2. Recent trends in financial flows to support better plastics management

Financial commitments aimed at curbing plastic pollution have been on the rise in recent years, reflecting the growing public consensus around the severity of the problem and the need to act. The analysis of official development assistance (ODA) flows reveals that a total of USD 1 460 million (USD 269 million for plastics specifically and USD 1 191 million for solid waste management more generally) was mobilised in 2022 to support plastic and solid waste management (Agnelli and Tortora, 2022[5]). Although ODA for plastic and solid waste management has seen continued increases in the last decade (Figure 7.5), this remains insufficient when compared to the cumulative investment needs across world regions to tackle plastic pollution. However, ODA can play an important role to leverage other sources of financing, including private finance, to support interventions along the value chain of plastics.

Figure 7.5. Official Development Assistance to curb plastic pollution is growing

Official Development Assistance (ODA) for solid waste management and ODA for management of plastics specifically, 2010-2022, USD million (2022 constant prices)



Source: (OECD, 2024[6]).

StatLink https://stat.link/ecpr9f

Flows of private finance to action to mitigate plastic pollution are also growing. Around USD 160 billion was invested into "plastics circularity solutions" globally between January 2018 and June 2023 (The Circulate Initiative, 2023[7]). However, the investment landscape is quite unevenly distributed, with nearly 90% of these financial flows having been directed to North America and Europe, presumably because policy environments are more stable and developed in terms of supporting circularity investments in these regions. Similarly, private finance is also unevenly distributed across different parts of the value chain, with down-stream recycling receiving most of the investments – around 85% (or USD 137 billion) – while upstream and midstream solutions, such as reuse models, receive much less.

Source: (Agnelli and Tortora, 2022[5]; The Circulate Initiative, 2023[7])

Beyond waste collection and management, directing investments towards the upstream and midstream stages of the plastics value chain is crucial to promote circular consumption patterns and alleviate burdens on waste management systems. Strategies may include supporting solutions to reduce avoidable and problematic plastics, to promote more reuse and repair, as well as to foster eco-design. Strong international co-operation will be essential for capacity building, technology transfer and governance strengthening, as well as to support the needed investments and innovation in developing countries, both via public (domestic and international) and private sources of financing.

7.5.2. Align financial flows with the objectives of the legally binding instrument on plastic pollution and explore options to utilise other sources of finance

Major redirections of plastics-related investments will be required around the world. Focusing on waste and recycling only, both OECD and non-OECD countries would need to invest more than USD 1 trillion over the 2020-2040 period to manage plastic waste volumes in the *Baseline* scenario, for a global total of USD 2.1 trillion. In the policy scenarios, these needs amplify as the sorting and recycling of waste is more expensive than e.g. using dumpsites, unless sufficient upstream and midstream action lowers total waste volumes enough to enable a reorientation of waste management activities rather than an expansion.

Beyond scaling up recycling and enabling the substitution of primary plastics with secondary plastics, redirections of investments will be required to support solutions further upstream, including to implement reuse systems for packaging and products. The alignment of financial flows from both public and private sources in line with the objectives and targets of the legally binding instrument under negotiation, will be critical to enabling a comprehensive transition across the plastics lifecycle.

7.6. Considerations for future research

A number of relevant economic aspects of plastic pollution could not be explicitly modelled in this analysis. Future research could complement the insights from the current report and investigate the following issues in more detail:

- A comparison of the costs and benefits of alternative policy options within policy pillars (e.g. regulation versus taxes to curb plastics demand) and in specific contexts. Governments may face political economy or other constraints regarding the use of specific instruments, or have preference for certain types of policy instruments. By investigating the economic consequences of different policy instruments that pursue the same targets (by pillar), further insights could be gained on the associated costs and benefits and potential trade-offs implied.
- An analysis of the sectoral consequences of the policies across scenarios, as well as of the drivers of changes in the economic structure of the economies in different regions. Certain sectors, such as motor vehicles and textiles, are more significantly affected by plastics policies than others. Given that the most affected sectors are implicated in global value chains and exposed to international competition to varying degrees, the domestic and international drivers of sectoral consequences can be further explored.
- An assessment of the costs and benefits of policies that target the leakage of microplastics. As discussed in Section 7.4, specific policy action is needed to tackle leakage of microplastics to the environment, and this in turn requires more research on the cost-effectiveness of different mitigation options.
- An assessment of the costs and benefits of policies that stimulate the use of plastics alternatives and substitutes. An important part of eliminating plastic pollution is to shift towards alternatives and substitutes. However, it is not always clear what the costs are, nor whether there are any trade-offs between environmental issues (and thus net environmental benefits) when replacing plastics with other materials.
- The integration of plastics policies into a wider framework of environmental policies to address the triple crisis of climate, pollution and biodiversity. The policy package in the *Global Lifecycle High stringency* [*Global Ambition*] scenario stabilises greenhouse gas (GHG) emissions at 2020 levels, but further reductions are foreseeable when integrating with climate mitigation policies. Similarly, integrating plastics policies with other environmental policies can lead to synergies and elucidate trade-offs where they exist.

- An assessment of the costs and benefits of removing plastics that have already leaked to the environment. It is generally assumed that remedial action is more expensive than avoiding plastic leakage, especially when plastics have entered rivers and oceans. But a full cost-benefit analysis of remedial action, including in different environmental media and employing different interventions (e.g. citizen clean-ups versus clean-up technologies), is lacking.
- An assessment of the social costs of plastic pollution and the distributional consequences of inaction for different household groups. Plastic pollution may affect disadvantaged households disproportionately, e.g. small-scale fisheries in small island developing states. Furthermore, the product cost increases associated with upstream policies may affect purchasing power of different household groups to differing degrees. Such effects may warrant flanking policies, which can only be effectively implemented when the consequences are quantified.
- The role of behavioural change in stimulating the elimination of plastic pollution. Households play a central role in reducing demand for plastics, both directly (e.g. packaging for online sales) and indirectly through plastics embedded in consumer products (e.g. synthetic fibres in clothing). Households can also play a role in improving recycling rates and incentivising industry to transition to a more circular use of plastics.
- A more differentiated analysis of the economic consequences of policies targeting specific polymers and applications in specific regions, including a focus on the most harmful plastics (i.e. those that are particularly likely to end up in the environment or contain chemicals of concern). The policy packages modelled in the current report are necessarily rather crude, allowing for a broad analysis. More in-depth analysis of particular plastics polymers and applications may shed light on opportunities for governments to avoid the most important sources of plastic pollution.
- An assessment of government support for primary plastics production and consumption, including fossil-fuel and other subsidies. The policies aimed at internalising the externalities of plastics production and consumption as investigated in this report can be undermined by implicit or explicit support to primary plastics production, in the same way that fossil fuel support undermines climate change mitigation objectives. An inventory of existing support provided to primary plastics, and further analysis of the consequences of reforming these, can contribute further to developing a cost-effective pathway to eliminate plastic pollution.

These issues for future research notwithstanding, the current report charts a clear path to the elimination of plastic pollution by 2040, achieving a near-total elimination of leakage of macroplastics to the environment and a stabilisation of GHG emissions at 2020 levels. An effective pathway combines globally co-ordinated policies to curb production and demand, promote design for circularity, enhance recycling and close leakage pathways. While these ambitions are formidable and the challenges to be overcome are significant, a balanced global approach that covers the entire lifecycle of plastics can deliver significant environmental benefits at lower economic costs compared to other, lower ambition scenarios presented in the report.

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Notes

[1] Due to concerns with the feasibility and the environmental impacts of chemical recycling, the scenario analysis assumes that mechanical recycling technologies are the primary type of recycling technology adopted by countries.

[2] Importantly however, these investment needs currently only account for interventions downstream in the plastics lifecycle and notably do not include investments required to support the implementation of ambitious upstream and midstream policies such as reuse, eco-design and promoting material substitutes.

From:

Policy Scenarios for Eliminating Plastic Pollution by 2040

Access the complete publication at:

https://doi.org/10.1787/76400890-en

Please cite this chapter as:

OECD (2024), "Putting the Global Ambition into context: Challenges and priorities", in *Policy Scenarios for Eliminating Plastic Pollution by 2040*, OECD Publishing, Paris.

DOI: https://doi.org/10.1787/7b287237-en