

BRANDED

VOL. III



#breakfreefromplastic
Brand Audit 2020

DEMANDING CORPORATE
ACCOUNTABILITY
FOR PLASTIC POLLUTION

Executive Summary

In 2020, thanks to our members and allies, Break Free From Plastic engaged 14,734 volunteers in 55 countries to conduct 575 brand audits. These volunteers collected 346,494 pieces of plastic waste, 63% of which was marked with a clear consumer brand. Despite the challenges of organizing during a global pandemic, our volunteers safely coordinated more brand audit events in more countries this year than in the previous two years. As a special activity during the pandemic, we also worked with over 300 waste pickers to highlight their roles as essential workers.

Participants catalogued over 5,000 brands in this year's global audit. Our analysis reveals the following as the 2020 Top 10 Global Polluters: **The Coca-Cola Company; PepsiCo; Nestlé; Unilever; Mondelez International; Mars, Inc.; Procter & Gamble; Philip Morris International; Colgate-Palmolive; and Perfetti Van Melle.**

The title of Top Global Polluters describes the parent companies whose brands were recorded polluting the most places around the world with the greatest amount of plastic waste. Our 2020 Top Global Polluters remain remarkably consistent with our previous brand audit reports, demonstrating that the same corporations are continuing to pollute the most places with the most single-use plastic¹. Coca-Cola, Nestlé, and PepsiCo have remained our Top Three Global Polluters every year since our first global brand audit in 2018².

For the third consecutive year, Coca-Cola emerged as the #1 Top Global Polluter. A total

“Break Free From Plastic engaged 14,734 volunteers in 55 countries to conduct 575 brand audits. These volunteers collected 346,494 pieces of plastic waste.”

of 13,834 branded Coca-Cola plastics were recorded in 51 countries, reflecting more plastic than the next two top global polluters combined. These results amount to a significant increase, as we recorded 2,102 more branded Coca-Cola plastic items in 14 more countries in 2020 than in last year's global brand audit.

Seven of the top polluters—The Coca-Cola Company; PepsiCo; Nestlé; Unilever; Mondelez International; Mars, Inc.; and Colgate-Palmolive—have joined The New Plastics Economy Global Commitment, but [this is not enough](#). According to a recent Ellen MacArthur report, the signatories to the New Plastic Economy Global Commitment have only reduced their use of virgin plastic by only 0.1% from 2018 to 2019³.

The Break Free From Plastic movement is calling on companies to urgently reduce the amount of single-use plastic they use. The top polluters must reveal how much single-use plastic they use, then set clear, measurable targets for reducing the quantity of single-use plastic items they produce. Finally, they must reinvent their product delivery systems to move beyond single-use plastic altogether.



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Dedication

We are proud to dedicate this report to waste pickers, especially the ones who joined us in this year's global brand audit. These essential workers disproportionately shoulder the burden of our broken waste system, and we were grateful to collaborate in demanding accountability from the corporations who continue to profit from the plastic pollution crisis they themselves have created.

Thank you to the following groups for coordinating waste picker brand audits on the ground:

KKPKP/SWaCH

EcoWaste Coalition

Greenpeace Philippines

South African Waste
Pickers Association

groundWork

GAIA Africa

WIEGO Ghana

Kpone Landfill Waste
Pickers Association

Cooperpac Waste Pickers
Cooperative

Pacific Environment

Vietnam Zero Waste
Alliance

Centre for Marine
life Conservation and
Community Development

The Centre for
Social Research and
Development

SUNGCO Limited
Liability Company

Environnement et
Développement Du
TIERS-MONDE

GAIA Latin America



Kpone Landfill Waste Pickers Association in Accra, Ghana

Acknowledgments

This report reflects the continuation of many years of hard work by members of the Break Free From Plastic global movement to expose the world's top corporate plastic polluters.

First and foremost, thank you to everyone who participated in a brand audit and submitted their data. Recording this data is meticulous, time-consuming work, and we appreciate your commitment to this important citizen action initiative, particularly during such a challenging year. The "Branded" report relies on the efforts of people like you around the world. Thank you again to the 14,734 volunteers who took part in this year's brand audit!

We are also grateful for the pioneering efforts of the original groups who collaborated in 2017 to design the foundational brand audit methodology: the Global Alliance for Incinerator Alternatives (GAIA), Mother Earth Foundation, Citizen consumer and civic Action Group (CAG), and Greenpeace Philippines. Thank you for laying the groundwork to make this initiative possible.

Many thanks to Neil Tangri and Win Cowger for advising on our scientific methodology, as well as to our data scientist Vince Vertulfo. Your contributions to improving the brand audit methodology, tools and processes have been critical to the integrity of the data upon which this report is built.

Our deepest gratitude goes to our translation team, whose work enabled more people around the world to both participate in and learn from the global brand audit initiative: Youssef Alshatti, Anastasiia Martynenko, Jaka Kranjc, Evgenia Tasheva, Claudia Sick, Isadora Ortiz, Felipe Torres, Seema Prabhu, Rima Agustina, Gusti Krishna, Ira Jalik, Pennapa Kradtarn, Liao Zita, Meg Imperio, Quach Thi Xuan, Carla Wichmann, Marina Tomović, Manfred Santen, Giuseppe Ungherese, Iveta Cadrova, and Choony Kim.

A special thank you to this year's editorial team: Marina Ivlev of 5Gyres, Felipe Torres of GAIA Latin America, Anastasiia Martynenko of NGO Zero Waste Society Ukraine, Carissa Marnece of GAIA Africa, Sherma Benosa of GAIA Asia Pacific, Jen Fela of Greenpeace USA, as well as Emma Priestland, Brett Nadrich, Estelle Eonnet, Jed Alegado, Shilpi Chhotray and Von Hernandez from the BFFP Team. Thank you for bringing your diverse perspectives and thoughtful feedback to the report development process.

Thank you to all our guest writers who contributed to the report text: Alex Gordon, Dr. Ben Locwin, Kathleen Collins, Lakshmi Narayan, Louise Edge, Miko Aliño, Dr. Owosu Boampong, Simon Mbata, and Valquiria Candido da Silva.

Finally, none of the brand audit coordination or report publication could have been possible without the generous financial support of the Flotilla Foundation and the Plastic Solutions Fund. Thank you for believing in us and making our work a reality.

With gratitude,

Sybil Bullock
Global Brand Audit Coordinator
Break Free From Plastic

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<https://www.no-burn.org/>

ON THE GROUND AUDITING THE WORLD'S PLASTIC WASTE



Centre for Marine Life Conservation
and Community Development
(Vietnam)



Korean Federation of Environmental
Movements (KFEM)/Friends of the Earth Korea



Trash Hero Mamuju
(Indonesia)



Project Marigold
(Philippines)



Paryavaran Mitra (India)



Nipe Fagio
(Tanzania)

**People to People
International**
(Nigeria)



**Amis de l'Afrique Francophone-Bénin/
Let's Do It! Bénin**

Let's Do It! Togo



Strandliners
(United Kingdom)

Plastifreecame (Spain)



NGO Zero Waste Society
Ukraine



Plastic Change & artist Maj D
(Denmark)

Artwork is a great way to share with the public, industry, politicians and decision-makers our work and efforts toward a plastic-free environment. Denmark's first national brand audit led by Plastic Change has resulted in this wall hanging with branded items collected by Danish volunteers that contributed to the dataset for the global brand audit.



Sea Shepherd
(Australia)



Algalita Marine Research & Education
(California, USA)



Marshall University Sustainability Club
(West Virginia, USA)

"I am fortunate enough to be able to choose zero waste items and avoid plastic packaging as much as I can," Sustainability Club president, Baleigh Epperly said. "But I am dedicating my life and my career to sustainability so that I can help ensure that West Virginians and people around the world have the same access to these choices."



11 Y Nos Vamos (Mexico)

DiskOncept/Vamos a Hacerlo (Colombia)

Taganga is a traditional fishing village in the Caribbean coast of Colombia. It is located at the northwestern flank of the Sierra Nevada de Santa Marta, some of the world's tallest coastal mountains. Taganga is home to ancestral fisherfolk and indigenous communities, and their economy depends on artisanal fishing and tourism. Various types of corals, sponges, sea turtles, molluscs, crustaceans and over 129 species of fish have been identified in the waters around Taganga.

"When we got here many of the corals were already dead, they were white and the fishes were gone. Since we started with our cleanup campaigns in 2015, we have seen changes both in the coral reefs and in the communities," said Carlos, Director of DiskOncept. "We have organized more than 50 clean up campaigns, taking tons of plastic waste out of the sea and the coral reefs."

This is the first year they performed a formal brand audit and they are excited to continue with the movement for future cleanups and brand audits. They hope to engage more with local communities, including indigenous people and fisherfolk, since they are the most impacted.



Introduction

2020 has disrupted every part of our lives, creating circumstances ripe for the systemic change we desperately need. There has never been a better time to demand greater corporate accountability for the plastic pollution crisis that plagues our planet. Brand audits are one tangible tool to push corporations and policy makers towards building better systems for a plastic-free future.

Break Free From Plastic's (BFFP) brand audit is a citizen action initiative that involves counting and documenting the brands found on plastic waste collected at a cleanup to identify the companies responsible for plastic pollution.

By collecting data on plastic waste, we challenge the industry narrative about who is responsible for the plastic crisis and how to solve it. Brand audits enable us to **shift the focus** back to the companies that are responsible for creating the problem in the first place, and empower us to demand that they stop producing unnecessary throwaway single-use plastics. The annual brand audit report **holds the top polluting companies accountable** for fueling the plastic pollution crisis. Our efforts rely on people power to stand up to these multinational corporations.

People power launched the Break Free From Plastic movement in the Philippines in 2016 to unite the voices of people worldwide advocating to stop plastic pollution at every stage of the plastic lifecycle. We are committed to **building a global movement** towards a future free from plastic pollution, while supporting and empowering communities on the frontlines of this crisis. Our movement unites over 11,000 organizations and individual supporters

**Why do we do
brand audits?
Shift the narrative.
Hold plastic
polluting
companies
accountable.
Build a global
movement.**

from around the world to bring systemic change through a holistic approach that tackles plastic pollution across the whole plastics value chain – from extraction to disposal – focusing on prevention rather than cure, and providing effective solutions. BFFP member organizations and individuals share the common values of environmental protection and social justice.

Brand audits enable communities to collectively influence the discourse on plastic pollution and provide them with the means to challenge polluters.

Everyone facing the consequences of plastic pollution is welcomed and encouraged to take part, from coastal communities impacted by microplastics, to people living in neighborhoods choked by the toxic fumes from plastic incinerators, to those whose water has been poisoned by petrochemical processing. Plastic causes pollution and other environmental assaults at the expense of various communities and stakeholders from the moment its raw materials – oil and gas – are extracted.

Changemakers from all over the world have joined forces for this annual effort, including small and large NGOs, community groups, schools and youth clubs, and of course, individual volunteers. As with other environmental crises, plastic pollution hits vulnerable communities and marginalized groups the hardest⁴. In this year's global brand audit, our goal was to support and further empower one of the most vulnerable communities at the end of the plastic pollution life-cycle – waste pickers.



© Wason Wanichakorn / Greenpeace

We coordinated brand audits with waste picker groups in seven countries to shed light on how plastic pollution directly impacts waste picker's livelihoods. This initiative was framed within BFFP's [Principles for a Just Recovery](#), which we developed to guide our work towards a post-pandemic world.

By focusing the 2020 report special edition on waste pickers, we hope to shine the spotlight on the essential role they play in moving our societies closer towards real sustainability, as opposed to the industry's belligerent role in perpetuating the plastic pollution crisis. Waste pickers deserve justice now.

Principles for a Just Recovery:

- 1 **Prioritize health for people and planet**
- 2 **Invest in solutions, not bailouts**
- 3 **Replace single-use with sustainable systems**
- 5 **Demand corporate and government accountability**
- 6 **Engage impacted communities**



Methodology

FOUNDATIONS

The foundational brand audit methodology was designed by the Global Alliance for Incinerator Alternatives (GAIA), Mother Earth Foundation, Citizen consumer and civic Action Group (CAG), and Greenpeace Philippines. These pioneering groups collaborated in 2017 to organize the first large-scale brand audit on Freedom Island in the Philippines. Our current methodology remains mostly unchanged apart from a few simplifications.

RECRUITMENT

In August and September 2020, Break Free From Plastic mobilized people around the world to organize brand audits in their communities. During this time-frame, participants were recruited through our BFFP social media channels, email listservs, newsletters, and our movement members who spread the word across their networks and communities. All participants took part in the brand audit on a voluntary basis.

TRAINING

The BFFP Brand Audit Coordinator provided [online training webinars](#) for leaders, to support them with everything from event planning logistics to data collection details. The training sessions were held in multiple languages including English, Arabic, French, Spanish, and Portuguese. BFFP movement member Trash Hero led training webinars in



BFFP created an [animated training video](#) with subtitles in 15 languages.

Bahasa Indonesia, Thai, and Malay. We also provided a short animated [training video](#) with subtitles available in 15 languages.

COVID-19

Due to the coronavirus pandemic, extra steps were taken to prioritize the health and safety of participants. Brand audit event organizers were requested to follow a [Cleanup and Brand Audit Coronavirus Risk Assessment Guide](#) and adhere to the safety procedures. When outdoor cleanup and brand audit gatherings were not deemed safe due to the coronavirus, we encouraged individual outdoor brand audits. We also presented the option for indoor brand audits at home as a last resort.

SITE SELECTION

Participants choose their preferred site for the cleanup and brand audit. Brand audit sites have ranged from urban city streets, parks, forests, beaches, coastal areas, and any other place where plastic waste accumulates. Due to pandemic restrictions against large public gatherings in some places, participants also had the option of conducting indoor brand audits at home. This involved designating a collection container for all the plastic packaging they disposed of during one week and auditing the total at the end of the 7th day.

DATA RECORDING

Participants used the updated [brand audit toolkit](#), [data card](#), and [visual guide](#), available in 12 languages, to guide their data collection process in a standardized



manner. The data card required participants to document the following categories about the plastic waste collected:

- brand names
- item descriptions
- types of products
- types of materials
- layers

“From Break Free From Plastic’s perspective, all plastic is pollution—not just the plastic litter collected outdoors.”

DATA ANALYSIS

Participants submitted their data using one of three standardized digital platforms: the BFFP [online form](#), the [TrashBlitz web app](#), or an Excel spreadsheet. Outdoor data, indoor data, and waste picker data were analyzed together to calculate the top 10 global corporate polluters. From Break Free From Plastic’s perspective, all plastic is pollution – not just the plastic litter collected outdoors.

While outdoor brand audit data tells us about plastic that has escaped the waste stream, indoor brand audit data as well as waste picker data reveal that plastic within the waste stream is also problematic. As a fossil fuel product, single-use plastic packaging causes pollution from the moment it is produced. Even if it does end up being properly collected, plastic packaging is often incinerated or exported to other countries unequipped to manage it.

ACCESSIBILITY

36 participants qualified for funds of up to \$400 USD to help cover the expenses associated with hosting a brand audit event. All waste picker groups also received stipends.

MODIFICATIONS

2020 marks BFFP's third year coordinating a global brand audit. Each year, feedback from participants have been incorporated to further improve our tools and methodology in order to best serve their needs. Following our 2019 global brand audit, a few changes were made to simplify the process including:

- We removed "volume" and "recyclability" as these categories provided little usable data in practice.
- We specified that items recorded in the "other" materials type category must be at least 50% plastic.
- We added surgical face masks to the "personal care" category.

LIMITATIONS

This report relies on self-reported data submitted by diverse participants from all over the world. While our database has been significantly improved to match brands with their parent companies, this is a participatory project composed of thousands of brands and parent companies from many countries in different languages. It is possible for us to have missed the brand-parent company correlation in a few cases. To review the full list of brands recorded in each country, see [here](#). The data submitted is a sample of global plastic waste and cannot claim to be fully representative of all plastic pollution. It is possible that some brands not captured in this report may produce even more plastic pollution than those listed in this report. The data reflects the plastic brands most commonly found in Asia, Europe, and North America where BFFP has a strong presence. Taking into account the 55 countries represented, the brand audit data results give us a good indication of the most common brands found polluting communities around the world.

Brand Audits During a Global Pandemic

Our 2020 global brand audit recorded 770 single-use surgical masks – which are made primarily of polypropylene, a type of plastic – and 419 surgical gloves.*

Our first priority is the health and safety of our participants and their communities. To help ensure that brand audit events were as safe as possible, we developed a [Cleanup and Brand Audit Coronavirus Risk Assessment Guide](#) that brand audit organizers were required to follow.

If local authorities imposed limitations on outdoor gatherings, participants were encouraged to conduct an individual brand audit on a solo walk outdoors. As a last resort, to make brand audits accessible for those unable to go outside, participants could do brand audits at home by recording data on plastic waste disposed over the course of one week. Thanks to these precautions, our volunteers safely coordinated more brand audit events in more countries this year than in the previous two years, in large part due to a greater number of smaller events with fewer people.

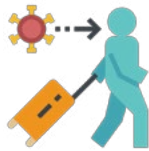
* Surgical gloves are commonly made from either latex, vinyl, or nitrile. Vinyl is a type of plastic, while latex is a natural rubber and nitrile is a synthetic petroleum-based rubber⁵.



SAFETY PROCEDURE FOR CLEANUP & BRAND AUDITS

Developed by Trash Hero World

PEOPLE



- Request that high risk people* do not attend.
- Remind people who don't feel well and / or have visited a high risk area† recently to stay at home.

INFORMATION



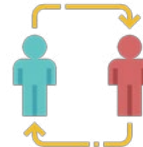
- Check public health guidelines right up to the last minute and be prepared to cancel.
- Make sure everyone knows and understands the safety rules at your briefing and debriefing.

HYGIENE



- Have hand sanitiser available and remind people to wash their hands after the event.
- Operate a "bring your own" policy for gloves and water: no food or drink to be provided on site.

SOCIAL DISTANCE



- Do not shake hands or hug. Wave or bow instead :)
- Ask participants to wear masks and stay at least 2 metres apart during the cleanup. This helps to stop the spread of the virus.

115 scientists and health experts from 18 countries agree that reusables can be used safely during the pandemic⁶, and we cannot allow one global crisis to exacerbate another. Here are the facts:

- Coronavirus spreads primarily from inhaling aerosolized droplets, rather than through contact with surfaces⁷.
- Disposable products present similar issues as reusable ones⁸.
- Reusable products are easily sterilized⁹.

A volunteer from Center for Peace Across Borders wears a reusable cloth face mask for a Covid-safe brand audit in Nigeria.

How can we prioritize public health while also addressing the plastic pollution crisis? Here's what one epidemiologist and COVID-19 government policy advisor has to say:

"As is always the case, it's not EITHER public health OR the future of the environment, but must be a combination of both. Public health is inextricable from issues of global consequence, and where one goes so does the other... In approaching public health in the context of what it means to share this planet, we need to 'do both': Ask what can be done to reasonably keep people healthy, while at the same time not — literally — throwing away our future. Every single decision can be framed in this way to serve both the individual and the collective. Companies that do good tend to do well, and we should — as a society of consumers — incentivize them for doing the right things. At the current rate... there will be no viable planet to reap profits from. It's literally in corporations' best interests to be engaged."

- Dr Ben Locwin

Healthcare Futurist, Science and Public Health Task Force member, and COVID-19 public policy advisor

The experts have spoken. Reusables can be safe, even in a pandemic. Plastic, by contrast, is neither healthy nor safe. A new UN-backed [report](#) from the International Pollutants Elimination Network (IPEN) revealed extensive evidence that the chemical additives in plastics are poisoning people and the planet, in addition to blocking a safe circular economy¹⁰. Harmful chemicals including perfluorinated chemicals, phthalates, and others are added to the plastics used in consumer products like food packaging (Ibid). Exposure to even small amounts



Center for Peace Across Borders

of these chemical additives in plastic can cause cancers, damage to immune and reproductive systems, impaired intellectual functions, and developmental delays (Ibid). Moreover, it is our most vulnerable communities — low-income front-line workers such as waste pickers and people of color — who are disproportionately impacted by plastics as well as COVID-19¹¹.

We cannot allow the plastic industry to take advantage of the coronavirus pandemic to justify the expansion of plastic production. It is possible for us to build back better, by reimagining a future free from coronavirus and single-use plastic. Better yet, we can do so in a way that leaves no one behind.



“The experts have spoken. Reusables can be safe, even in a pandemic. Plastic, by contrast, is neither healthy nor safe.”

WASTE PICKER BRAND AUDITS



South Africa Waste Pickers Association/
groundWork/GAIA Africa

According to *Women in Informal Employment: Globalizing and Organizing* ([WIEGO](#)), a waste picker is someone who earns a living by “collecting, sorting, recycling, and selling materials that someone else has thrown away”¹². Some are considered informal workers, while others are organized in cooperatives and associations to improve their working conditions.

Waste pickers are essential workers as they provide the vital service of collecting and sorting valuable discards, and therefore play a pivotal role in combating the plastic pollution crisis. Because they are often informal workers and marginalized, the pandemic has made their precarious situation even more dangerous while their work remains more essential than ever. Now, 15 million informal waste pickers and their families risk losing their livelihood due to COVID-19¹³. This comes as a combined result of such factors as lockdowns and restrictions on waste pickers’ mobility and price fluctuations for recovered recyclable plastics (Ibid).

The “Special Edition” brand audits, in collaboration with waste picker groups, shine a spotlight on the essential work and service that they provide to our societies, despite the challenges posed by the pandemic. In emphasizing the vital work of waste pickers, we also wanted to expose how the plastic industry’s dirty decisions on packaging are impacting their livelihoods. This underscores the need for corporations

Waste pickers display Coca-Cola bottles in South Africa.

to be held accountable for the effect that their packaging has on vulnerable communities. Waste pickers collect recyclable items from many places, from within the waste stream in homes, businesses, and landfills, to waste that has escaped the waste stream into the environment. We worked specifically with waste picker groups who collect from within the waste stream: landfills and doorstep waste pickers (see [Basic Categories of Waste Pickers](#) to learn more). A total of 332 waste pickers joined to conduct brand audits in seven countries: Brazil, Chile, Ghana, India, Philippines, South Africa, and Vietnam. All participating waste pickers were compensated fairly for their work.

For years, corporations have been propagating the self-serving myth that plastic waste picking creates jobs for marginalized communities¹⁴. But firsthand accounts from waste pickers expose a different reality: the majority of the throwaway single-use plastics collected during the brand audit have little to zero monetary value (Figure 2). Low value plastic comes most often in the form of multi layered packaging like sachets, which are used to sell small quantities of products like shampoo, detergent, condiments and coffee. Data from this year's global brand audit reveals sachets were the most commonly found type of item, with 63,972 recorded in total. These tiny multilayer plastic packages are so low value that it makes no economic sense for waste pickers to collect them, making them very hard to recycle¹⁵.

Adding insult to injury, many corporations claim that these single-serve sachets are “pro-poor” because they allow low-income people to purchase very small quantities of packaged food or personal care products at prices they can afford¹⁶. Ironically and unfairly, low-income communities bear the hidden costs of this unmanageable plastic waste. They are burdened with cleaning up the sachets that often end up clogging rivers and waterways or are endlessly piling up in dumpsites with no solution for dealing with them in an environmentally sound manner.

Waste pickers and the BFFP movement are demanding that companies shift toward refill and reuse systems, to replace packaging that is not recyclable and provides no economic benefit. As Simon Mbata, waste picker and National Coordinator of the South African Waste Picker



“The majority of the throwaway single-use plastics collected during the brand audit have little to zero monetary value.”

Simon Mbata, waste picker and National Coordinator of the South African Waste Picker Association.

Association (SAWPA) puts it: “Whatever cannot be recycled, must not be produced.”

In an effort to justify the continued production of high quantities of single-use plastic packaging, some fast-moving consumer goods (FMCG) companies have resorted to PR campaigns ostensibly to show how they are partnering with waste pickers to collect their packaging¹⁷. Yet working conditions for waste pickers have been worsened due to the shift to lower value plastic packaging that they cannot resell for recycling. Worse, in countries like the Philippines, throwaway plastic collected by waste pickers and paid for by FMCG companies as part of their sustainability commitments, often ends up being burned in cement kilns, causing air pollution and health risks to nearby communities¹⁸. Industry predictions forecast a growing trend for FMCG companies to shift more of their packaging to [single-use flexible packaging](#), such as sachets and pouches, especially in emerging markets around the world¹⁹.

Many of the companies that we have identified as top plastic polluters in our previous brand audit reports have multiple small scale projects around the world with waste pickers – such as Unilever in India, Danone in Ghana, or Coca Cola in the Philippines – but they shy away from making the changes that would be most impactful on a large scale^{20, 21, 22}. These trends create a serious environmental and social injustice, as the waste pickers who are relied upon to help realize the promises and commitments made by corporations to reduce their plastic footprint, are increasingly burdened with the challenge of sifting through more low-quality single-use plastic.

Break Free From Plastic members around the world call on governments to offer ambitious policy solutions, and on business leaders to publicly announce corporate commitments, in order to ensure that waste collection and refill systems provide safe, good quality jobs for waste pickers.



“Whatever cannot be recycled, must not be produced.”

FIGURE 1

HOW MUCH WASTE SURVEYED WAS RECYCLABLE?

Based on self-reported data submitted from waste picker brand audits, here is the percentage of types of plastic waste that waste pickers are currently able to resell for recycling.

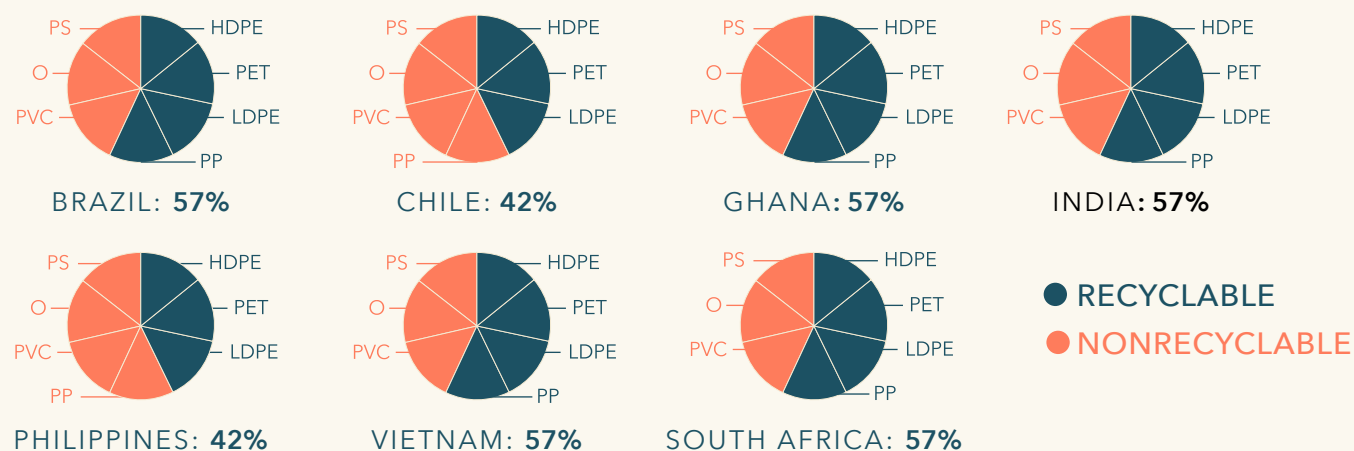


FIGURE 2

WHAT ARE RECYCLABLES WORTH?

USD/KG earned by waste pickers for types of plastic waste collected.*



PET



HDPE



PP



LDPE

	PET	HDPE	PP	LDPE
BRAZIL	\$0.50	\$0.36	\$0.29	\$0.036
CHILE	\$0.50	\$0.36		\$0.036
GHANA	\$0.07	\$0.18	\$0.29	\$0.14
PHILIPPINES	\$0.21	\$0.25	\$0.25	
VIETNAM	\$0.26	\$0.17	\$0.22	\$0.07
SOUTH AFRICA	\$0.16	\$0.19		
INDIA	\$0.24	\$0.24	\$0.24	(transparent)—\$0.19 (milk packets)—\$0.054

*A key explaining the different types of plastics can be found on page 34.

WORDS FROM WASTE PICKERS

Companies say they have created small sachets for the urban poor. If you could meet one of these corporate CEOs, what would you say to them?

// This statement is of total disrespect, underestimating the intelligence of waste pickers. In our daily lives, we see thousands of packages go through the conveyor belt with no commercial value and that leave us distressed and afflicted, to know that the thought of large corporations is to treat waste pickers with indifference and not recognizing the works done by the category."

– Valquiria Candido da Silva
Waste picker from Brazil

How do company decisions about plastic packaging directly impact the livelihoods of waste pickers?

// In my own experience, I work at a material recovery facility with waste pickers in VaalPark South Africa, and the majority of the plastic that we come across is not recyclable. This no value plastic impacts the livelihoods of waste pickers, because it eats into the profits and surpluses of our projects. The reality is that companies who produce this type of plastic are not creating jobs for waste pickers, but are quickly destroying the planet. The only way that these companies can create jobs for waste pickers, is if they create recyclable materials that can go back into the economy. Whatever cannot be recycled, must not be produced. My hope is to see waste pickers in South Africa working in better environments and being an integral part of the waste management system."

– Simon Mbata, waste picker and National Coordinator of the South African Waste Picker Association (SAWPA)

A WORD FROM WASTE PICKER EXPERTS

// I have been working as a consultant for WIEGO [Women in Informal Employment: Globalizing and Organizing] to build the capacity of waste pickers in Accra and to advocate for their inclusion into the formal waste management system until the COVID-19 pandemic wreaked havoc on their livelihoods. They have witnessed a drastic drop in their incomes due to a decline in prices of recyclables and the closure of



Felipe Torres/GAIA Latin America

“We see thousands of packages go through the conveyor belt with no commercial value.”

recycling companies, making it difficult for them to meet their basic needs and that of their families. Recyclable plastics have long been their gold but they have recently observed the gradual increase in the quantities of non-recyclable plastics in the waste stream at the dump site, which have no economic value to them. This is of major concern to them, but they are determined not to fall through the cracks. They have begun scoping for doorstep collection as an alternative source of livelihood in the Kpone coastal community. In order to achieve their dream of doorstep collection, they have asked for a waste collection contract from the government, tricycles, a material recovery facility and support to transition their association into a cooperative."

– Dr. Owusu Boampong, waste picker specialist
Research Fellow, Department of Integrated Development Studies
University of Cape Coast, Ghana

"In fact, waste pickers neither want single-use plastics for recycling, nor the expensive commodities they package."

// Around 15 million waste pickers retrieve paper, metal, glass and plastics from municipal solid waste, and move it up the value chain through scrap traders to reprocessors. They form the base of a pyramid responsible for over 50% of global recycling that employs millions. Despite internalizing costs and subsidizing corporations whose waste materials they recycle, they are fragmented, marginalized and often displaced by corporate investment in pilots that incentivizes superficial behavior change, encourages expensive, capital intensive, centralized technologies, or research small-scale efforts in obscure, expensive, inefficient recycling."

"FMCG manufacturers unhesitatingly claim sachets ensure the poor have access to their wonder products in bite-size, that littering and pollution are due in equal measure to weak municipal solid waste management systems and the 'indisciplined', illiterate poor, and that continued production of plastics ensures waste pickers access to a steady income. In fact, waste pickers neither want single-use plastics for recycling, nor the expensive commodities they package."

–Lakshmi Narayan, waste picker specialist

Lakshmi is an activist based in Pune, India. She is a co-founder and former secretary general of KKPKP, a trade union of self-employed waste pickers. KKPKP was instrumental in the formation of SWaCH, an autonomous waste picker cooperative offering decentralized, front end, waste management services to the city of Pune.

Announcing the 2020 Top Global Polluters

Despite clever marketing tactics and lofty “sustainability” goals, the same companies continue to make our list of Top Global Polluters year after year. The Coca-Cola Company, PepsiCo, and Nestlé have consistently remained the top three global corporate plastic polluters since our first global brand audit report in 2018. Unilever and Mondelez International have been in the top five for two years in a row.

The Top Global Polluters Ranking reveals the corporations that pollute the most places around the world with the greatest amount of plastic waste. These results are ranked primarily according to widespread global distribution – in other words, by the number of countries where brand audits reported finding these companies. Our priority metric was to examine these companies’ presence across the highest number of countries, to be consistent with our methodology since 2018. We also factored in the total number of branded items recorded that were produced by these companies as a secondary metric. Together, these “Top Global Polluters” emerged, reflecting both depth and breadth.

Our worldwide network of volunteers record the brand names found on the plastic waste they collect in their clean ups. The data is analyzed to identify the parent companies, which can own up to hundreds of different brands. This year, participants recorded



FIGURE 3

THE 10 WORST POLLUTERS

Numbers of countries in which waste was found and pieces of waste recorded



over 5,000 brands owned by about 3,000 parent companies worldwide. **All ten of our Top Global Polluters are headquartered in Europe and the United States.**

Our analysis of this year's data reveals the following corporations as the 2020 Top 10 Global Polluters: The Coca-Cola Company; PepsiCo; Nestlé; Unilever; Mondelez International; Mars, Inc.; Procter & Gamble; Philip Morris International; Colgate-Palmolive; and Perfetti Van Melle.

Seven of these top polluters have joined [The New Plastics Economy Global Commitment](#) – a project of the Ellen MacArthur Foundation bringing together hundreds of businesses to work towards better plastic use through voluntary commitments – but have made very little progress in meeting their own 2025 goals for addressing the plastic pollution crisis²³. Corporations are instead doubling down on false solutions that may appear encouraging on the surface but lack substance²⁴. Commitments to make all packaging “100% reusable, recyclable, or compostable by 2025” are already insufficient because they fail to include reduction targets and enable corporations to continue justifying their excessive production of single-use plastics.

Meanwhile, proven solutions exist, but are yet to be adopted at scale by corporations²⁵. These solutions cut down on single-use plastic and focus instead on reusable and refillable packaging. Even Coca-Cola acknowledges in its 2019 [World Without Waste](#) report: “Refillable bottles are a critical part of our World Without Waste strategy... In more than 25 countries refillables make up half or more of our sales, and in more than 50 countries refillables make up 25% or more of sales, including Chile, Colombia, Germany, Kenya, Pakistan, Peru, the Philippines, and Tanzania”²⁶. Despite the important role that refillables play in tackling plastic pollution, some big brands are cutting down on refillable bottles and working to undermine deposit and return systems in many places, in favor of single-use and disposables²⁷.



WHERE WE AUDITED WASTE

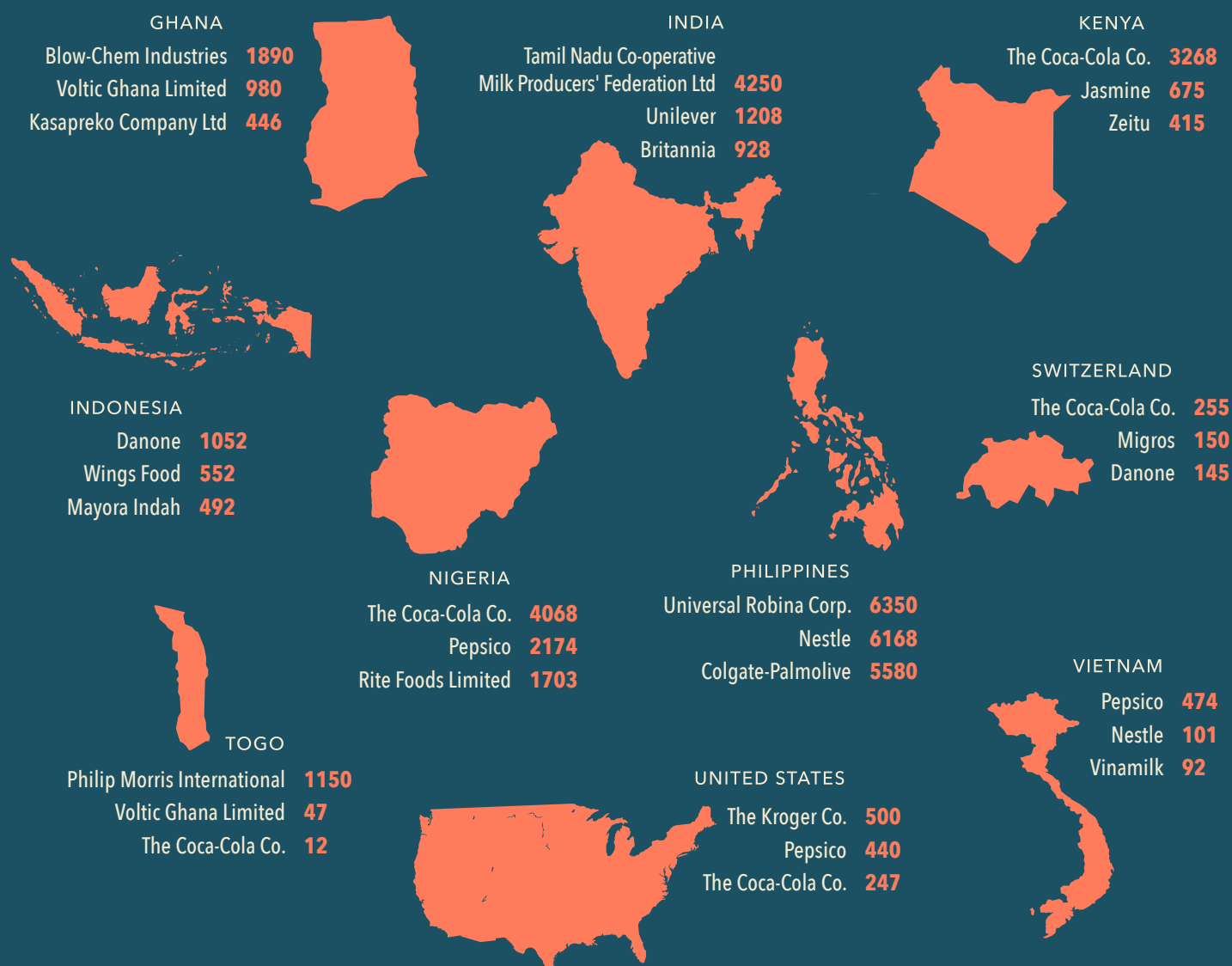
The brand audits were conducted between August 1 and September 30, 2020 to coincide with World Cleanup Day on September 19. Thanks to our members, Break Free From Plastic engaged 14,734 volunteers in 55 countries to conduct 575 brand audits. Our volunteers collected 346,494 pieces of plastic waste, 63% of which was marked with a clear consumer brand.



WORST POLLUTERS BY COUNTRY

The 10 countries that submitted the most data were Ghana, India, Indonesia, Kenya, Nigeria, the Philippines, Switzerland, Togo, the United States of America, and Vietnam. Here are the top three polluters in each of these countries.

FIGURE 5 | NUMBER OF WASTE ITEMS FOUND



To see the top three polluters from all countries that submitted brand audit data between 2018–2020, check out the interactive dashboard at <https://www.breakfreefromplastic.org/globalbrandauditreport2020!>

FIGURE 6

WHAT WE FOUND

MOST COMMON

PLASTIC TYPES

- 1 O | 132,445 PIECES**
Other/unknown includes sachets (e.g. Ketchup packets) and cigarette butts
- 2 PET | 81,904 PIECES**
Polyethylene terephthalate includes beverage bottles for water, soda
- 3 PP | 61,720 PIECES**
Polypropylene includes bottle caps, surgical face masks

MOST COMMON

PRODUCT TYPES

- 1 Food Packaging | 203,427 PIECES**
(e.g. Food wrappers, coffee cup lids, beverage bottles)
- 2 Smoking Materials | 72,342 PIECES**
(e.g. Cigarette butts, lighters, cigar tips)
- 3 Household Products | 21,030 PIECES**
(e.g. Laundry detergent bottle, shampoo bottle, cleaning product containers)

MOST COMMON

ITEMS FOUND

Sachets | 63,972 Cigarette butts | 60,344 Plastic Bottles | 50,968

PLASTICS KEY

While there are close to 50 different types of plastic worldwide, we typically group them in 7 major categories. These different types of plastic range widely in terms of quality, health risks, and recyclability.

PET: Polyethylene terephthalate
Clear or tinted plastic; often used for drink bottles, cups, pouches, etc.

HDPE: High-density polyethylene
White or colored plastic; often used for product bottles, jars, milk jugs, etc.

PVC: Polyvinyl chloride
Durable plastic, hard or rubbery;

often used for building materials, toys, shower curtains, etc.

LDPE: Low-density polyethylene
Clear, white, or colored plastic; often used for bags, plastic trays, holders, dispensers, etc.

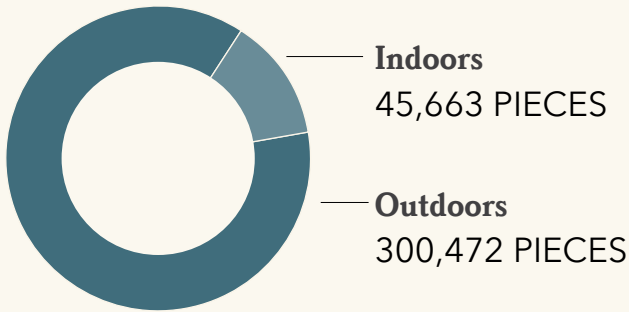
PP: Polypropylene
Hard but flexible plastic; often used for food containers or tubs, bottle caps, etc.

PS: Polystyrene
Rigid, brittle plastic OR foam; often used for cups, take-out food containers, lids, etc.

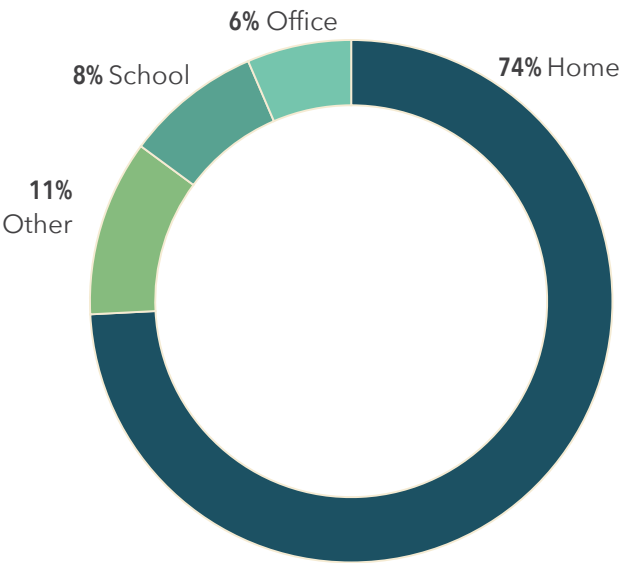
O: Other / Unknown
Bioplastics, products containing other plastics or types of materials, including textiles, etc.

FIGURE 7

WHERE WE FOUND IT



INDOORS



OUTDOORS

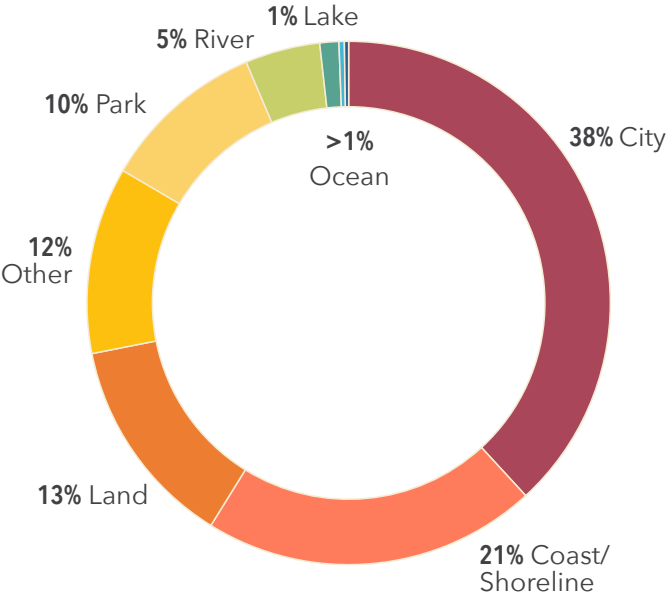
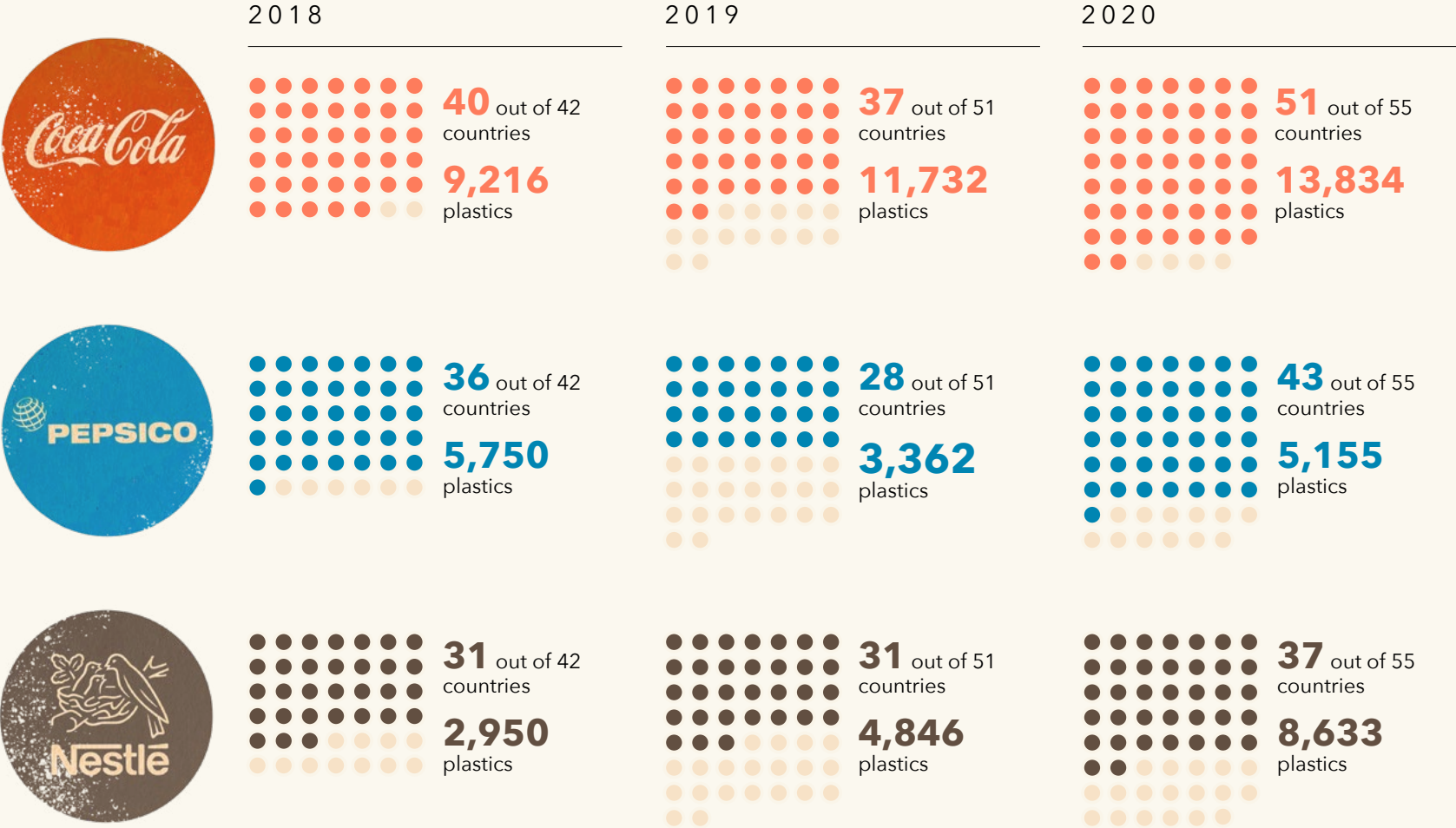


FIGURE 8

2018–2020

THREE YEAR DATA COMPARISON



Voices of the Movement

Spotlight on: Youth

As a student organizer committed to ending plastic pollution, what do you want corporate plastic polluters to know about the impacts their decisions have on the life of young people?

"Last year students working with PIRG [Public Interest Research Group] collected over 300 pounds of waste which was all audited and included in the BFFP Global Brand Audit Report. I, and students like me, work incredibly hard to preserve a future for ourselves, while PepsiCo, Coca-Cola, and other corporations consistently trash that future. Corporate polluters should know that young people are invested in ending plastic pollution, and we are effective agents of change on the issue. We've banned single-use plastics on our campuses, have educated thousands of peers about the alternatives to plastics, and brought other young folks into the movement. While these polluters and their waste negatively impact the lives of so many young people, we are taking charge of our future, and not going anywhere on the issue of plastic pollution."

Alex Gordon

*Florida Public Interest Research Group (PIRG) at Eckerd Chapter Chair
ECOS Director of Environmental Responsibility*

"While these polluters and their waste negatively impact the lives of so many young people, we are taking charge of our future."



Photo provided by Alex Gordon



Exxon-Mobil oil refinery, Baton Rouge, Louisiana (USA).

Spotlight on: Climate

How are the root causes—and solutions—to climate change connected to plastic pollution?

“Over 99 percent of all plastic is made from fossil fuels, most commonly oil and natural gas. Drilling for these fuels, extracting them from the ground, and transporting them to processing facilities are all very emissions-intensive processes. In fact, in the United States alone, extracting and transporting natural gas for plastic production generates an estimated 12.5 to 13.5 million metric tons of carbon dioxide equivalent per year – that’s the same as driving nearly 3 million cars for a year! Moreover, research estimates that across its lifecycle, plastics

account for 3.8 percent of global greenhouse gas emissions. To put that in perspective, if plastic use were a country, it would be the fifth largest emitter of greenhouse gases in the world. Plastics have a staggering impact through each emissions-intensive step of its lifecycle – they are a threat to healthy natural habitats, wildlife, and communities everywhere.”

Kathleen Collins
Campaign Strategist at The Climate Reality Project

“If plastic use were a country, it would be the fifth largest emitter of greenhouse gases in the world.”

Spotlight on: Brand audits at home

While indoor brand audits were already an option in Break Free From Plastic's global brand audit initiative in 2019, they were a very small part of our total dataset. Due to the COVID-19 public health crisis in 2020, we expanded this option in order to make brand audits more accessible and safer for participants who are still largely confined to their homes. This year, volunteers in 23 countries conducted 214 home brand audits and collected 33,882 pieces of plastic. For these home brand audits, participants designated a collection container for all the plastic packaging they disposed of during one week and audited the total at the end of the 7th day.

A group of students in Professor Robin Pelc's Marine Science Service Learning class at California State University, Monterey Bay conducted home brand audits as part of their course. Here are some of their reflections.

What was one new thing you learned?

Plastics are unavoidable! I feel like everything I purchased or used had some little piece of plastic on the packaging.

What surprised you?

What surprised me is that the products that I buy that I thought are considered recyclable are actually not because of the type of [plastic] material they are.

What, if anything, were you able to purchase in refill/reuse containers?

Nothing—with COVID a lot of places in my home town are not allowing reusable containers to be used, so we have accumulated more trash.

How have COVID-related changes, like lockdowns or store closures, impacted your purchasing options?

COVID-19 has definitely increased the amount of plastic waste in my family as the virus has forced us to order everything online in order to ensure our safety.

As individuals, we may try very hard to avoid plastic whenever possible. But often it just isn't possible, and many of us simply don't have the privilege of choice. After participating in this indoor brand audit, what kinds of "systems change" would you like to see?

I would like to see brands pay to ensure they are accountable in the long term for any plastic they produce.

“As a fossil fuel product, plastic is pollution the moment its raw material is extracted, and it continues to cause pollution at every stage of its life cycle.”



A waste picker holds up personal care product packaging during our 2020 brand audit.

Spotlight on: Zero Waste

What does the path from individual action to community action look like for you?

"We sort our waste, refuse plastic cups for coffee, nourish soils with compost, and send recoverable discards to local recyclers. However, **we've been circling around the industry playbook all this time, demanding behavior change among individuals.** Even if this behavior change happens to everyone, our communities—including those with the best Zero Waste practices—are likely to continue struggling with unwanted plastic waste. It's time to elevate our citizenship! Let's push governments to embrace Zero Waste and demand corporations to drop the hypocrisy and take responsibility for their products. The change has to happen at the very starting point of the problem, and that's with plastic-producing polluters."

*Miko Aliño
Zero Waste Program Manager at GAIA
(Global Alliance for Incinerator Alternatives) in Asia-Pacific Region*

Greenwashing

Greenwashing – (noun) the intersection of two company behaviors: poor environmental performance and positive communication about environmental performance.⁽²⁸⁾

The plastic industry refers to all of the different companies involved in the production and sale of plastic products, and 99% of plastic is made out of fossil fuels²⁹. This includes the companies that extract fossil fuels, turn fossil fuels into the building blocks of plastic, shape plastic into packaging and the fast-moving consumer goods companies (FMCGs) turning packaging into branded items.

Fossil fuel companies—such as Dow, DuPont, ExxonMobil, INEOS, and others—are involved in multiple parts of the plastic supply chain, including fossil fuel exploration and extraction, chemical processing, and consumer goods manufacturing. These petrochemical giants benefit from vertical integration, which is where a company also owns its suppliers, distributors and/or retailers. This creates a financial incentive for them to continuously increase the dual production of fossil fuels and single-use plastic products (e.g. sachets, water bottles, and countless other forms of packaging) to be sold around the world. While the world is already drowning in single-use plastic, the petrochemical industry plans to increase plastic production by 40% over the next decade³⁰.

Only 9% of all the plastic ever made has been recycled³¹, yet the companies that produce this plastic continue to hail recycling as the ultimate solution to combating the plastic pollution crisis. This places the blame for plastic waste and pollution on individuals who fail to recycle plastic after it is used. This approach

“Only 9% of all the plastic ever made has been recycled, yet...[producers] continue to hail recycling as the ultimate solution to combating the plastic pollution crisis.”

also blames local municipalities and governments for not providing sufficient recycling infrastructure for all the plastic waste that is generated. However, most single-use plastic simply can't be recycled or it's just not economical to do so, especially when the cost of virgin plastic is very low. Even in countries where the plastic recycling system is advanced, recycling rates are still low and the majority of plastic ends up being incinerated, landfilled or dumped in the environment. The only way to truly solve the plastic pollution crisis is to stop making so much plastic.

Researchers from Changing Markets have identified three primary tactics the plastic industry uses to promote false solutions, while they continue to produce ever more plastic: (1) **delay** regulation by pushing for "voluntary commitments" instead, (2) **distract** from their role at the heart of the crisis, and (3) **derail** legislation by lobbying against real solutions³².

Voluntary commitments are used to delay legislation because the companies can claim they are already dealing with the problem. They are also used as greenwashing marketing tools, and are often featured in public advertising campaigns. Voluntary commitments rarely make much headway in tackling environmental damage even though they receive media attention and shareholder praise. Furthermore, if all current corporate and government commitments were to be fully implemented, in 20 years the plastic flowing to the oceans will have only been reduced by 7%³³.

The most powerful industry strategies often manifest in international coalitions. Groups such as the Alliance to End Plastic Waste include some of the world's biggest petrochemical producers and top plastic polluting companies as members. Under this banner, the Alliance spends hundreds of millions of dollars highlighting false solutions and running small scale recycling and clean up proj-

Plastic Supply Chain



ects³⁴. While they do this, their member companies continue to make billions of dollars selling the same plastic waste they claim to want to put a stop to. While some companies encourage end of life tactics like recycling and beach clean-ups, they are also aggressively increasing the amount of plastic they produce. Worse, they lobby heavily against any governmental action to restrict the proliferation of single-use plastics³⁵.

BIO AND COMPOSTABLE PLASTICS

Greenpeace³⁶ has found that companies distract by promoting false solutions such as “bio” or “compostable” types of plastic. Bioplastics are made using some percentage of plant matter as the virgin material, instead of being entirely made out of fossil fuels. In extreme greenwashing examples, products made out of this material are labeled as “plant plastic” or “not plastic”. The reality is, plant materials undergo similar chemical reactions as conventional plastic. The material usually won’t degrade at the end of its life and it has to be burned or landfilled. Like all single-use items, it is a waste of precious resources and energy, and sends confusing signals to the general public.

Another material that has been touted as a solution by companies is compostable plastic. Compostable plastics have been designed so that they degrade after a long time and in certain conditions like higher temperatures and pressures. Many of these materials have to be sent to specialist industrial composting facilities and won’t degrade in a home compost heap or if dropped in the environment. Compostable single-use plastics may have some uses in certain situations, but for most plastic items they are a false solution and further perpetuate the notion that short-term technological fixes will save the day.

Some of the fast-moving consumer goods companies named in this year’s brand audits have responded to the public concern about plastic pollution with commitments to make 100% of their packaging recyclable, compostable or reusable³⁷. As we’ve discussed here, recycling and compostable packaging will make little difference in their status as top plastic polluters.

BURNING PLASTIC

The plastic industry often claims that burning plastic is an eco-friendly way of disposing of it. Many municipalities incinerate plastic waste as their normal waste disposal method instead of landfilling. Plastic is also used as fuel in cement kilns or to make energy in “waste-to-energy” plants. Burning plastic creates serious environmental and social problems. Researchers at GAIA have found that incineration emits toxic cancer and hormone disrupting chemicals and a host of other dangerous pollutants³⁸. In the US and UK³⁹ incinerators are disproportionately situated near low-income communities, causing higher air pollution and health concerns. Burning plastic in any form is not a solution, and has no part to play in a greener and more just future.



“Many of the schemes selling credits to other companies are actually burning the waste collected.”

PLASTIC OFFSETTING

Plastic offsetting and plastic credits is a new idea that follows the concept of carbon offsetting⁴⁰. One company earns “credits” for collecting and recycling or “treating” waste, then a different company buys those credits to offset the plastic products they make, even though the second company does nothing to keep their products out of the environment. Some of these plastic offsetting schemes allow companies to claim their products are “plastic neutral” because they have paid enough money into plastic collection projects⁴¹. Many of the schemes selling credits to other companies are actually burning the waste collected, claiming it has been “treated” and diverted from going into the ocean. In other words, plastic offsetting is ultimately a form of creative accounting that allows a company to make environmental claims without ever actually reducing the amount of plastic used or finding more sustainable ways to deliver their products to people (i.e. avoiding single-use plastic).

CHEMICAL RECYCLING

So-called “chemical recycling” is the process of breaking apart the building blocks of plastic polymers into their constituent parts to either make new plastic or, more commonly, fuel and/or other substances that are eventually burned⁴². Although there are claims that the process can be used to recycle plastics that are otherwise impossible to mechanically recycle, investigative research has revealed that the numbers cited by the plastic industry are often purposefully misleading⁴³. Chemical recycling is the industry’s latest attempt at a techno-fix that produces unknown amounts of carbon emissions, toxic wastes and other environmental impacts. Both the technological process itself and the economic model behind it are still unproven. Chemical recycling is only happening at a tiny scale today, and there is serious debate about whether or not the process actually works. However, many companies are still relying on chemical recycling to allow them to achieve their “100% recyclable” commitments for products that cannot otherwise be recycled, such as multilayered single-use sachets.

"It is clear that big corporations have created the plastic pollution problem and they, along with governments, must be held accountable for tackling it. Our task is to use our mass movement to force change. We best do this by relentlessly documenting companies' contribution to the problem, through brand audits and surveys; by investigating and exposing their greenwashing and behind-the-scenes lobbying; and by highlighting the real solutions. Our power comes from working together to engage the public and exert the mass people power that can force big brands to change their path."

- Louise Edge, Greenpeace Global Corporate Campaigner



**“Chemical
recycling...
produces unknown
amounts of carbon
emissions, toxic
wastes and other
environmental
impacts.”**

Real Solutions

Now that we've revealed the top polluting companies of 2020 and looked at the many ways single-use plastic harms people and the planet, we can delve into the real solutions to the plastic pollution crisis. It's important that we recognize that there are no quick fixes, and false solutions abound. Given the increasing applications of single-use plastic in modern society, each application will require tailored solutions, factoring in the actual and potential impacts of any solutions to the environment and the well-being of communities.

Companies, governments and individuals must consider the following questions when assessing potential solutions:

1. Is the solution affordable and accessible to all?
2. Will this solution use more energy and resources than the item or system it is replacing?
3. Is this a solution to the cause of the problem or is it merely swapping one single-use material for another?

COMPANIES MUST CHANGE

Reveal

It is vitally important that fast moving consumer goods (FMCG) companies and retailers be transparent about how much plastic they use every year, reported per item as well as by weight. The only way a company can set meaningful, measurable reduction targets is by knowing and sharing its starting point and yearly progress. Legislators also need to know how much plastic each company is using in order to design new laws that support a transition to lower plastic use.



Many companies are already revealing their plastic footprints by weight as part of their sustainability commitments to the Ellen MacArthur Foundation's Global Plastic Commitment ⁴⁴. Unfortunately, these annual reports are not subject to an independent audit to check for accuracy and veracity of claims, which is important for transparency and trust. The single-use plastic use that has been reported is staggering: the top five polluting companies combined have reported using 7,692,421 metric tonnes of plastic in 2019⁴⁵.

Reduce

Reducing overall single-use plastic use is the only way we will ever solve the plastic pollution crisis. As this year's brand audits have demonstrated, there is so much low value single-use plastic in circulation that it is inevitable that a lot ends up polluting the environment, and even if plastic goes to waste treatment, it is still causing pollution along its entire life cycle. Even in countries with more advanced waste collection and recycling systems, plastic pollution is still highly prevalent. Recycling alone will never be enough as most plastic cannot be effectively or economically recycled.

The worst example of low value single-use plastics are multilayered sachets that are used to sell small quantities of products to people. Multilayered sachets were the most found item this year, with 63,972 individual sachets collected. They are very hard to recycle and end up in the environment polluting communities, in huge quantities⁴⁶. Several of this year's top plastic polluters make and sell multilayered sachets, yet they also have sustainability commitments to make all their packaging 100% recyclable, reusable or compostable. Sachets are none of these things and companies must stop producing them in order to achieve their own commitments.

To drive the reduction of plastic, companies need to set clear, measurable, ambitious targets. Ideally these targets will increase over time to

drive further reductions. The ultimate goal should be to remove single-use plastic from their operations entirely, and replace them with long-lasting, reusable, refillable packaging or simply no packaging at all. These goals should be set per unit, not as a reduction of the overall weight of plastic used. This is because existing reduction targets that focus on weight of plastic have led to companies reducing the overall amount of plastic in a piece of plastic—called lightweighting—but they do not address their reliance on single-use plastic⁴⁷. This might have benefits in terms of use of raw materials, but it has little impact on the amount of plastic that ends up in the environment. A lighter weight single-use plastic bottle can still end up in the sea; whereas, a real solution would be a durable water bottle that can be reused over and over again. An ideal target should be specific, time-bound and measurable, for example, some members of the Break Free From Plastic movement are calling on companies to reduce the number of plastic packaging items they produce by 50% by 2025⁴⁸.

Reinvent

Companies must urgently rethink and redesign how they deliver products to their customers. The current business models of FMCG companies are based on marketing and selling their products in single-use plastic packaging, and conveniently passing the burden of managing their throwaway packaging onto consumers, taxpayers and local governments. This has resulted in massive environmental damage and harm to the health of communities living around plastic production facilities⁴⁹. This is unsustainable, unfair and has no place in a world facing multiple environmental and social justice crises.

The reliance on single-use plastic packaging as the method for delivering products to customers has become the norm in the last few decades, but it has not always been this way. Before the rise of single-use, beverages came in reusable glass bottles to be returned after use to be cleaned and refilled, in fact this is still the case in many communities around the world



today⁵⁰. Companies can look to the past where refillable, reusable packaging was commonly used and combine the old ways with modern technology such as phone apps and tracking barcodes to make the systems convenient and affordable. There are examples of refill and reuse systems all over the world for a diversity of products⁵¹. We are not starting from scratch. Companies and retailers need to reimagine their business models with an end to single-use as the starting point, then work with other stakeholders to make the new systems safe and convenient to use.

Reusable packaging often works best when it is standardized across all the companies in the sector. If each company forgoes their individual packaging styles, they no longer need to design separate reuse systems. By standardizing packaging design, companies can pool resources on the transportation and cleaning logistics to spread the costs and reduce emissions. This has worked successfully in Germany, for example, where multiple companies banded together to standardize beverage bottles so they could be reusable⁵². The only differentiating feature on these bottles is the label identifying the brand.

INVESTORS CAN TRANSFORM COMPANIES

Investors can play an important role pushing for change in consumer goods companies by choosing to invest in zero waste businesses, those committed to real solutions, or by working to transform companies they have already invested in. Shareholder resolutions have been proven to work in getting companies to set more ambitious targets, change specific packaging methods or improve other aspects of their sustainability performance. Shareholder activism by organisations, such as As You Sow, are responsible for mobilizing commitments from YUM! Brands in phasing out non-recyclable styrofoam packaging⁵³ and Starbucks in developing reusable packaging targets⁵⁴, amongst many other wins.

Investors should be aware of the risks associated with business models that depend on the use of single-use plastic and act accordingly. As the world wakes up to the damage caused by the plastic and fossil fuel industries, more and more governments are developing regulations that can harm a companies' profit margin if they fail to implement a low plastic business model⁵⁵. Single-use packaging based business models are also at risk of becoming irrelevant and losing market share if new startup companies with zero or low waste business models take off and become popular. The reputational risks associated with reliance on single-use plastic must also be taken into account by investors. More and more, customers are demanding companies find real solutions to their plastic footprint.



“The reputational risks associated with reliance on single-use plastic must also be taken into account by investors.”

GOVERNMENT REGULATION IS ESSENTIAL

Corporations are generally unwilling to make significant changes if they fear it will impact their profit margins and market share. That's why voluntary commitments from companies are rarely ambitious or fast enough to tackle major environmental problems⁵⁶. The only way we will solve the plastic pollution crisis is to see significant change to the way companies do business. It's no longer an option for corporations to rely on single-use plastic packaging and expect taxpayers and local municipalities to pick up the bill for managing their waste. Legislation is vital to ensuring that businesses protect citizens and the environment, not just profit margins.

Countries are already bringing in game-changing laws to help tackle the plastic pollution crisis, they include:

- 
- Banning the most harmful types of plastic and single-use plastic items
 - Making companies pay for the cost of collection and waste treatment of their products at their end of life
 - Imposing targets for the amount of recycled plastic that must be included in packaging
 - Implementing deposit schemes for reusable packaging such as beverage bottles
 - Setting high targets for recycling, combined with ensuring that recycling happens in the country where the waste was made
 - Legislating to reduce plastic use and increase reusable packaging
 - Bringing in taxes, levies and other financial tools to incentivize real solutions

While corporate voluntary action is not enough to solve the plastic pollution crisis, neither is legislation on its own sufficient enough. Both governments and companies need to make changes and work together to achieve real and lasting impact.

A GLOBAL TREATY

Countries from around the world are in discussions about a global treaty to tackle plastic pollution. History has shown that environmental protection is most successful when all governments work together with a common goal like the case of the Montreal Protocol⁵⁷, which united governments around the world to phase out the use of chemicals responsible for the hole in the ozone Layer. The United Nations Environment Assembly recognizes marine plastic pollution as a serious environmental threat, and is investigating ways to address it. Meanwhile, the Break Free From Plastic movement is demanding a global treaty that addresses plastic pollution at every stage of its life cycle. In 2020, two thirds of United Nations members states declared their support for a new treaty on plastic pollution⁵⁸, but many oil- and gas-producing nations are opposed. It is time for all national governments to commit to a new treaty that covers the entire life cycle of plastic.

INDIVIDUALS ARE PART OF THE SOLUTION

Everyday people around the world have a vital role to play in solving the plastic pollution crisis. Without pressure from their customers or the people who vote them in power, companies and governments are slow to change. By boycotting the most polluting corporations, writing letters to decision makers, using wallet power to support zero waste businesses, being vocal on social media, protesting new plastic production facilities and of course by taking direct action such as conducting a brand audit, people have enormous power to affect change. Community groups around the world are encouraging their local businesses and municipalities to adopt zero waste principles and fight back against the expansion of petrochemical facilities that make plastic. The Break Free From Plastic movement is made up of individuals who are committed to making broad, sweeping, positive change for people and the planet by collaborating with changemakers around the globe. Congratulations; by reading this report and learning about waste pickers, corporate accountability and alternatives to single-use, you are already part of the solution.

Conclusions

Thanks to the Break Free From Plastic movement and its allies around the world, corporations are increasingly scrutinized and held to higher standards because people are demanding better. Instead of pursuing real solutions, however, many corporations are choosing to double down on the single-use disposable business model that created the plastic pollution crisis in the first place⁵⁹. In doing so, corporations continue to fail people and the planet, and further perpetuate the illusion that recycling is enough to stem this crisis.

Top plastic polluters like The Coca-Cola Company, Nestlé, and PepsiCo have made very little progress in reducing total plastic use or switching to reusable packaging. According to a recent Ellen MacArthur report, the signatories to the New Plastic Economy Global Commitment have reduced their use of virgin plastic by 0.1% from 2018 to 2019⁶⁰. Coca-Cola has actually increased the amount of plastic they use*. Top polluting companies are not only failing to meet their already weak commitments, they are increasingly relying on greenwashing to present an outward mirage of sustainability while continuing to “delay, distract, and derail” real progress⁶¹.

One particularly offensive ploy is the growing market trend toward low-quality, lightweight multilayer packaging⁶². Lightweight packaging may be cheaper to

* Coca-Cola reported to Ellen MacArthur for their 2020 progress report that in 2019 they used 2,982,421 metric tonnes of plastic, but in 2018 they reported 2,970,289 metric tonnes used.



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transport, but the multilayers make it very difficult to manage as waste, creating a much more expensive problem in the long term⁶³. Furthermore, it threatens the livelihoods of waste pickers who rely on reselling high-quality plastic to recyclers. Companies are effectively dumping the full cost of plastic pollution onto people who pay the price with a deluge of plastic packaging flooding their communities. Sachets are one prominent example, as these miniature plastic packages are inundating the markets in Global South countries under the corporate guise of “pro-poor marketing.” Sixty-four million sachets are used each day in the Philippines alone⁶⁴. These sachets are not only unrecyclable, they are replacing higher quality plastics that waste pickers rely on for their livelihood.

The industry’s addiction to single-use plastic has been exacerbated this year with the explosive production of single-use plastic personal protective equipment (PPE) to combat the spread of the novel coronavirus⁶⁵. In our global brand audit, participants recorded 419 surgical gloves and 770 single-use masks, which are made primarily of polypropylene—a type of plastic. This is a unique challenge to 2020, but not unique to our disposable culture. It is merely the latest symptom of a larger problem of how we deal with waste.

People can no longer afford the toxic cycle of fossil fuel extraction, single-use packaging, and unmanageable plastic waste. Corporations must act now to reveal their total global plastic footprint—and that includes fully accounting for the impact of their products throughout their life cycle, including toxics and carbon emissions. They must commit to drastically reduce the amount of plastic they produce—and governments must hold them legally accountable for the consequences associated with their continuing reliance on single-use plastic packaging. Voluntary corporate commitments are proving to be ineffectual and inadequate in dealing with this worsening crisis. Finally, corporations must reinvent the way they deliver their products to people in a way that does not rely on single-use plastic, such as through standardized refill and reuse systems.

At Break Free From Plastic, we are committed to build back better. We condemn the plastic industry taking advantage of the coronavirus pandemic to justify more single-use plastic production, and we will continue to hold them accountable in 2020 and beyond. Visit www.breakfreefromplastic.org to take action by joining the global Break Free From Plastic movement.

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