The Next Plastics Playbook:

Inside the Ellen MacArthur Foundation's 2030 Business Agenda

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Executive Summary

In November 2025, the Ellen MacArthur Foundation (EMF), along with the United Nations Environment Programme (UNEP), unveiled the 2030 Plastics Agenda for Business. The Agenda is marketed as a voluntary, feel-good roadmap to "end plastic pollution." In practice, it's a template for turning corporate pledges into one-size-fits-all laws, written upstream, then pushed downstream onto national legislatures.

Presented as a collaborative strategy to curb plastic waste, the plan urges governments to implement Extended Producer Responsibility (EPR) systems, set reuse targets, and adopt packaging design guidelines based on a blueprint created by EMF.

The 2030 Plastics Agenda for Business marries business and policy under the guise of accomplishing shared environmental goals. In doing so, corporations and climate activists unite under UN authority to restrict local innovation, disrupt fair competition, and reduce democratic transparency. This white paper explores who is driving the Agenda, how it operates, where its data claims fall short, and what the long-term implications are for national sovereignty and environmental stewardship.

CFACT's review finds that effective environmental stewardship depends on measurable results and voluntary innovation, not centralized global uniformity. To that end, this paper recommends a return to evidence-based policymaking and free-market environmentalism rooted in transparency, competition, and consent.

Drivers Behind the Agenda

EMF has been promoting the "circular economy" since 2010. The goal of the circular economy is to use materials longer to minimize waste. In 2018, EMF collaborated with UNEP to consolidate worldwide plastic-reduction efforts through the Global Commitment, "the largest global voluntary effort on plastic waste and pollution, with 1200+ organizations from across the world united behind a common vision." From the Foundation's perspective, the response from 1200+ organizations across 184 countries justifies a shift from voluntary participation to a government-enforcement model to expedite compliance on a global scale.

UNEP's support for the Global Commitment served as the motivation to turn EMF's initiatives into policy templates discussed at high-level negotiations, with UNEP serving as the authority on what constitutes environmental legitimacy. Meanwhile, corporations act as both funders and advocates, blurring the lines between policymakers and lobbyists. International brands such as Nestlé, Unilever, Danone, PepsiCo, and others are motivated to support the Agenda because this coordinated approach provides significant benefits to their bottom lines. Global regulation provides larger brands protection from smaller competitors and offers reputational protection in a

world increasingly defined by risk related to Environmental, Social, and Governance (ESG) metrics.

In effect, EMF provides the intellectual and technical framework, UNEP supplies the multilateral authority, and the world's largest brands provide the political momentum. Together, they form a self-reinforcing policy triad capable of advancing binding global standards without formal democratic consent.

Core Elements of the Agenda

The 2030 Plastics Agenda for Business outlines a strategy to overcome three "systemic barriers" to a circular plastics economy: scaling reuse, addressing flexible-packaging waste, and improving collection and recycling infrastructure (Ellen MacArthur Foundation [EMF], 2025, p. 13). EMF argues that no company can resolve these barriers alone because "the economics don't work" (p. 13). To address this, the Agenda proposes a single, compulsory policy structure that merges voluntary corporate initiatives with government enforcement, placing Extended Producer Responsibility (EPR) at the center. Under EPR, producers would be legally obligated to finance waste-management systems and ensure materials re-enter the supply chain through recycling or reuse.

The Three "Systemic Barriers"

Scaling Reuse. Reusable packaging is described as one of the most effective tools for reducing plastic waste, but scaling reuse is difficult for most companies, as EMF concedes that reuse systems usually mean higher costs than single-use packaging and are only practical in large-scale manufacturing with shared logistics, cleaning facilities, and active consumer participation (EMF, 2025, p. 13). The Agenda highlights that uncertainty about when reuse will become cost-competitive and which policies might speed up that transition "is holding back the critical mass needed to move forward" (p. 13).

Flexible Packaging Waste. Low recycling rates, high leakage, and "a lack of alignment" on whether to recycle, substitute, or reuse these materials make flexible plastics (films, pouches, multilayer wraps) "the most challenging from a circular-economy perspective" (EMF, 2025, p. 13). EMF argues that this confusion "paralyses" innovation and investment, and that harmonized standards are required to direct market and policy decisions toward "aligned" solutions.

Collection and Recycling Infrastructure. Citing Pew and SYSTEMIQ data, EMF reports that over 140 million tons of plastic packaging are produced annually, with only about 15 percent recycled and 40 percent mismanaged (EMF, 2025, p. 13). The Agenda calls for "billions of USD" in new waste infrastructure, particularly in the Global South, arguing that such investment will not occur without enduring policy frameworks and financing mechanisms such as EPR.

The "Triangle" of Action

To address these systemic barriers, EMF recommends a "triangle of action": individual, collaborative, and collective advocacy (EMF, 2025, p. 18).

- *Individual action:* individual companies redesign their packaging to be easier to recycle, eliminate items deemed "problematic" by the Agenda, and pilot reuse models like refill-at-home or business-to-business closed systems.

- *Collaborative action:* firms pool investment and infrastructure to strengthen the business case for reuse and flexible-packaging alternatives. EMF's modeling of returnable beverage bottles in France found that when only 2 percent of the market participates individually, costs are about 35 percent higher than single-use; at 40 percent market participation, costs fall 21 percent below single-use (p. 19).

- *Collective advocacy:* businesses coordinate lobbying and communication to press governments for "effective, well-enforced policy" that makes circular models viable. EMF points to the global acceleration of EPR laws following a 2021 call to action by 100 companies as an example (p. 18).

The Policy Toolkit

Even though the Agenda avoids the word "mandate," it highlights several policies they would like to see made global law: Extended Producer Responsibility (EPR); reuse-enabling policy; material and design standards for flexibles; Global South infrastructure projects; and cross-cutting fiscal and financial measures (EMF, 2025, pp. 21–22).

- *Extended Producer Responsibility (EPR):* EPR requires producers to finance collection and recycling through fees. EMF credits corporate advocacy with the rapid spread of EPR frameworks and says "well-designed" schemes are key to funding infrastructure on a long-term basis.
- *Reuse-enabling policy:* EMF asserts "conditions for reuse to scale" can be created by deposit-return schemes, reuse targets, procurement incentives, and restrictions on certain single-use items.
- *Material and design standards for flexibles:* EMF promotes "a common vision and boundary conditions" for substituting materials, shared R&D platforms to de-risk investment, and public policy backing for uniform standards for flexibles and packaging "design rules.
- *Global South infrastructure projects:* the Agenda highlights city-level collection and recycling projects in developing regions as "proof-of-concept" demonstrations designed

to attract co-investment from public and private actors.
- *Cross-cutting fiscal and financial measures:* EMF encourages governments to use taxes, subsidies, and other instruments to reward "circular" choices and penalize the use of "non-circular" materials.

The 2030 Target Package

EMF also highlights claims from Global Commitment signatories that between 2018 and 2024, the following progress was made: (EMF, 2025, pp. 11–12)

- eliminated roughly 775,000 tons of "problematic packing;
- reduced virgin-plastic use by 6 percent, while the global market rose 13 percent; and
- tripled recycled-content share from 4.6 percent to 15.9 percent.

EMF's read on this so-called progress is that if 20 percent of the market can move with The Global Commitment, governments should force the other 80 percent to comply by implementing the 2030 Plastics Agenda for Business.

Global Convergence and Governance Implications

The 2030 Plastics Agenda for Business functions as a global governance model rather than an environmental framework. By establishing a network of corporations, NGOs, and UN agencies that collectively define global parameters for ecological regulation, the Agenda bypasses democratic oversight. The Agenda removes power from the people it is proposed to govern and defaults to policies proposed by think tanks, validated by UN bodies, endorsed by activist coalitions, and implemented by governments eager to maintain international credibility.

Global plastics legislation has nearly doubled from roughly 500 to about 1,000 laws since 2018, many of which closely reflect the EMF's recommendations. Treaty language, donor financing, environmental, social, and governance (ESG) metrics, pressure to meet them, and international "best practice" status encourage countries to copy/paste the same approach to be seen as global leaders. These voluntary actions often become law without a domestic public debate over trade-offs, costs, or alternatives.

The concept of "collaborative advocacy" translates into corporate lobbying coordinated with UN objectives. A structure in which member states are encouraged to legislate with EMF's goals to maintain market consistency, as its guidelines grant UNEP-endorsed business coalitions a quasi-legislative role in shaping environmental regulations across every nation, without regard to the local ecological realities. EMF presents this as "alignment for impact," but the result is an unprecedented shift of policymaking power. Instead of a mostly free market, large corporations and multilateral institutions would have significantly more power. Smaller organizations would

have a harder time competing and holding large organizations accountable in the marketplace.

By infusing (ESG) compliance into trade and investment frameworks, the 2030 Plastics Agenda for Business creates real disadvantages for smaller companies and developing economies, especially those that lack the capital or infrastructure to meet uniform global standards. When local autonomy is traded for global conformity, innovation starts to stall. If a material or technology does not fit the pre-approved "circular" box, it gets pushed aside. The result is less competition, more red tape, and a marketplace shaped by multinational influence where power concentrates, and choice disappears.

Weak Evidence

The Agenda uses three reports to support its argument for legalization:

1. *Breaking the Plastic Wave* (Pew/SYSTEMIQ 2020)
2. UNEP's *Turning off the Tap* (UNEP 2023)
3. OECD's *Global Plastics Outlook: Policy Scenarios to 2060* (OECD 2022).

These reports are widespread in climate activist circles but lack the observed outcomes to justify the global action. The models used in these studies assume unrealistic consumption patterns, enforcement, compliance, and economic conditions. Those assumptions can overstate both the certainty of the forecasts and the feasibility of one-size-fits-all solutions.

Microplastics claims are another flashpoint. Major reviews from World Health Organization, like *Dietary and Inhalation Exposure to Nano and Microplastic Particles* (WHO, 2022) and the *Microplastics in Drinking-Water – Information Sheet* (WHO, 2019), the Food and Agriculture Organization's 2024 *Microplastics in Food Commodities* report (FAO, 2022), and the *European Environment Agency Microplastic Releases to the Environment* (EEA, 2025) acknowledge that evidence of human harm remains limited and still developing. Public concern is genuine, but policy should be set based on what is known, what is not known, and the trade-offs being made. Nonetheless, the Agenda uses public concern about microplastics to support early-stage restrictions on production and materials, citing the precautionary principle as justification.

Restoring Consumer Choice Through Innovation and Freedom

The way to tackle plastic pollution is to enable companies to compete and innovate. Handing authority to global bureaucracies stifles manufacturers' ability to do both and is far less transparent.

The global approach used in the 2030 Plastics Agenda for Business monstrosity could lock countries into policies based on speculation rather than proven results. Corporations' commitment to ESG metrics should remain voluntary and not be etched into law. Allowing UN agencies to this level of governmental overreach gives an unfair advantage to large manufacturers with global reach. It squeezes out the little guy, resulting in fewer choices for consumers.

Treaty negotiations grounded in the protection of national sovereignty and the rejection of one-size-fits-all solutions, including production caps and design mandates, are a far better idea than the 2030 Plastics Agenda for Business. Policies that respect national sovereignty ensure a geographically sensitive, sustainable plastics strategy that leaves the decision-making to local officials, entrepreneurs, and voters directly affected by the policy.

The world needs cleaner oceans and better waste systems, but not at the expense of self-governance, nor under pressure from unelected members of the UN and the Ellen MacArthur Foundation.

Good environmental stewardship relies on reductions in leakage and litter that can be accurately measured — not on models whose results are mostly conjecture. Reject the UN's attempt to control the plastics lifecycle through corporate entities under the guise of "collaborative advocacy." Allow nations and markets to solve real problems on the ground.

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