

MARKET LANDSCAPE REPORT

Euromonitor played a pivotal role in reshaping the client's sustainable innovation strategy by facilitating a comprehensive understanding of the recycling infrastructure in key markets, while also explaining the potential implications and opportunities this knowledge presented for their future actions.



Challenge

Euromonitor employed a multi-source approach, drawing from a diverse array of government sources and expert interviews to offer a thorough assessment of the recycling landscape. This assessment also looked into the probable future developments within the waste management system.

Approach

A comprehensive approach allowed our Sustainability team to identify global case studies highlighting how companies accelerate their sustainability goals:

- » Euromonitor's Sustainability team undertook a thorough analysis by collating waste management statistics from municipalities in several regions. This comprehensive effort resulted in a detailed examination of waste management and recycling infrastructure, both at the county and regional levels. The analysis encompassed every aspect of the supply chain, including leakage prevention, collection, sorting, recycling and extended producer responsibility (EPR).
- » Leveraging internal Passport data specific to packaging, the team estimated the preliminary market size across different materials (rigid and flexible plastic, metal, glass, paper) and various waste types (leaked, collected, recycled, dumped into landfills/burnt, not collected).



- » In-depth interviews conducted with industry stakeholders played a vital role in validating the project data and insights acquired in earlier phases. Additionally, these interviews helped to identify potential future developments within the waste management system.

Impact

The analysis pinpointed the actual process model and cross value chain cooperation, while also enabling a comparative assessment of the end-of-life performance of key packaging types in each region. These research findings contextualised strategy directions offering insights into optimising packaging recycling potential, identifying opportunities for Extended Producer Responsibility (EPR) partnerships, pinpointing potential challenges and ensuring the achievement of recycling goals for the client.