

Production and Use of Disposable Plastic in Georgia: review and recommendations



Bottles

- **Trends 2021-2023:** Import volume of plastic bottles increased sequentially from \$8.97 million in 2021 to \$17.72 million in 2023, indicating strong demand. Exports, however, declined slightly from \$198.89 million in 2021 to \$192.57 million in 2022, but then increased to \$237.37 million in 2023.
- **6M 2024:** Import and export volumes continue to show positive growth, with a slight decrease in production (-7% y-o-y) but a 15% increase in exports.

Plastic bags

- **Trends 2021-2023:** Plastic bag imports increase from \$4.13 million in 2021 to \$6.23 million in 2023. Exports also show growth, especially with a sharp increase of 144% from 2021 to 2022. However, the growth rate slows down to 11% in 2023.
- **6 months 2024:** Exports increase sharply by 3360% in 2023, indicating a massive increase in export demand, but there is a slight decline (-3%) in the first six months of 2024. Imports continue to grow.

Plastic preform

- **Trends 2021-2023:** Plastic preform import volume peaked in 2022 at \$12.61 million, then declined slightly to \$11.31 million in 2023. Exports showed a significant increase of 35% in 2022, but then decreased by 10% in 2023.
- **6M 2024:** Imports remain stable, but exports have declined slightly. Production volumes also reflect a downward trend, indicating possible problems with production capacity or market demand.

Plastic containers

- **Trends 2021-2023:** Import volumes declined sharply in 2022 but recovered significantly 2023, showing an increase of 34%. Export volumes remained relatively low.

- **6 months 2024:** Imports remain strong while exports show significant increase (464%) year-on-year, indicating possible new demand or market opening.

Cutlery

- **Trends 2021-2023:** Import volumes increased consistently, reaching \$14.56 million in 2023. Exports, however, showed significant volatility, with a 75% drop in 2022, followed by a 15% increase in 2023.
- **6M 2024:** Import volumes fell slightly (-2%), while exports increased significantly (by 116%).

Overall trends and conclusions:

- **Growth and Demand:** Overall, the data reflects growing demand for various plastic products, with imports increasing in almost all categories from 2021 to 2023.
- **Export volatility:** While imports show steady growth, exports show high volatility, with some categories such as plastic bags and cutlery.

Conclusion

The aim of the project was to comprehensively assess the current situation regarding plastic use in Georgia. This involved examining various factors such as import and export of plastic materials, domestic production practices, recycling processes and the availability of viable alternatives to single-use plastic products. To achieve this goal, the project involved collecting extensive statistical data on plastic production and use, analyzing the country's legislation and policies related to plastic waste, and assessing the feasibility of alternatives to plastic products. In addition, surveys were conducted among individual citizens to assess public awareness and behavior regarding plastic use, while in-depth interviews with manufacturers and key industry provided valuable information on production and recycling practices and the challenges businesses face in adopting sustainable alternatives. Through these efforts, the project has achieved a deep understanding of the plastic landscape in Georgia.

The key partners we have worked with during this project period are

All key project partners, including the Ministry of Finance of Georgia, the National Statistical Office of Georgia, the Ministry of Environment Protection and Agriculture of Georgia and the Ministry of Economy and Sustainable Development, as well as the 3 largest producers of single-use plastic products, provided valuable statistical data and other relevant information.

Type of single-use plastic	Import volume in 2021, USD.	Export volume in 2021, USD.	Import volume in 2022, USD.	Export volume in 2022, USD	Import volume in 2023, USD	Export volume in 2023, USD	Import volume 6 Mon. 2024, USD	Export volume 6 Mon. 2024, USD
Bottles	8 969 176	198 891 115	12 610 278	192 567 617	17 716 361	237 369 801	16 416 884	272 236 034
Change in production volume, as a percentage of the previous year	n/a	n/a	41%	-3%	40%	23%	-7%	15%
Plastic bags	4 128 997	4 196	5 636 944	10 239	6 230 923	354 307	7 212 274	343 335
Change in production volume, as a percentage of the previous year	n/a	n/a	37%	144%	11%	3360%	16%	-3%
Plastic preform*	10 693 644	4 518 646	12 610 160	6 078 656	11 311 544	4 466 578	11 370 841	4 058 736
Change in production volume, as a percentage of the previous year	n/a	n/a	18%	35%	-10%	-27%	1%	-9%
Plastic containers	2 190 145	35 051	1 576 077	26 800	2 110 096	8 008	1 764 371	45 168
Change in production volume, as a percentage of the previous year	n/a	n/a	-28%	-24%	34%	-70%	-16%	464%
Cutlery**	8 972 106	28 484	12 683 822	7 032	14 563 446	18 756	14 303 158	40 438

Change in production volume, as a percentage of the previous year

n/a

n/a

41%

-75%

15%

167%

-2%

116%



Activities implemented during the first phase of the project

During the **first phase of the** project, we conducted a comprehensive data collection and analysis focused on the plastic industry in Georgia. We collected, sorted and analyzed information on imports and exports of all plastic goods classified by type from 2021 to 2024. We scrutinized the existing legislation related to the production and use of plastic. To gain deeper insights, we developed questionnaires and conducted interviews with 220 individuals to understand consumer behavior and perspectives. In addition, we created a separate questionnaire specifically designed for manufacturers, to collect industry data.

We compiled a list of all registered limited liability companies involved in plastic production and made initial contact with each of them (approximately 80 companies). After a preliminary review, we identified and selected companies that met the objectives of our project. In-depth interviews were conducted with the selected manufacturers to gather additional data and insights to inform our strategies to reduce plastic pollution and promote sustainable practices within the industry. We also identified companies that supported our initiatives.

Key achievements

Our major achievements include several key milestones. First, we successfully conducted data collection and analysis, gathering and examining important information on plastic use, which provided valuable insights for the project. Second, we researched plastic-related legislation and interacted with 220 individuals and key industry manufacturers, allowing us to understand both consumer behavior and industry practices. Third, we built partnerships with companies supporting initiatives to reduce plastic use, establishing important partnerships for future action. Finally, we laid the groundwork for future awareness efforts by building a robust knowledge base to guide the development of targeted content for upcoming campaigns aimed at reducing plastic use.

Key findings and conclusions

Interviews with manufacturers showed that companies with more than 5 years of experience produce a wide range of plastic products and believe that a 10-20% reduction in plastic production is feasible within the next five years. They are aware of the new legal regulations but showed no interest in attending the workshops. **They** agreed that some plastic products present significant challenges for recycling.

In terms of public opinion, people are generally aware of the environmental hazards posed by plastic, but continue to use it because of its convenience and low cost. However, there is a willingness among the population to switch to environmentally friendly alternatives.

In terms of regulations, although legislation regulating plastic use exists, it needs to be reviewed and more strictly enforced. Overall, the biggest challenge remains the lack of an effective waste management system, including the lack of adequate segregation and disposal facilities.

Key lessons learned

Georgia is heavily dependent on imports of plastic products and raw materials, as is no domestic production capacity to meet local demand. It is impossible to compete on price with large production centers such as China and Turkey.

Due to poor waste management infrastructure, Georgia has difficulty recycling plastic waste, resulting in pollution; waste can be complex in composition or include materials that are not recyclable under existing conditions.

Alternative Products Market

To analyze the market for alternative products to single-use plastic, three key categories were identified: disposable tableware (cups, spoons, forks, plates), tubes, and bags.

Bamboo tubes - Paper, straw, bamboo and cane drinking tubes. **Imports:** Growing steadily from US\$1.82 million (2021) to US\$2.78 million (2023) (52.4% growth over three years). Indicates growing demand.

Exports (Re-Exports): Exports are small but increase significantly from US\$48,000 (2021) to US\$441,000 (2023) (an increase of 818.9%).

Paper bags

Imports: High and relatively stable, increasing from \$13.88 million (2021) to \$17.88 million (2023) (a 28.8% increase over three years).

Export (Re-Export): Moderate growth from US\$199 thousand (2021) to thousand (2023) (146.1% growth).

Paper cups - Paper, cardboard, wooden, bamboo, biodegradable cup, spoon, fork, set.

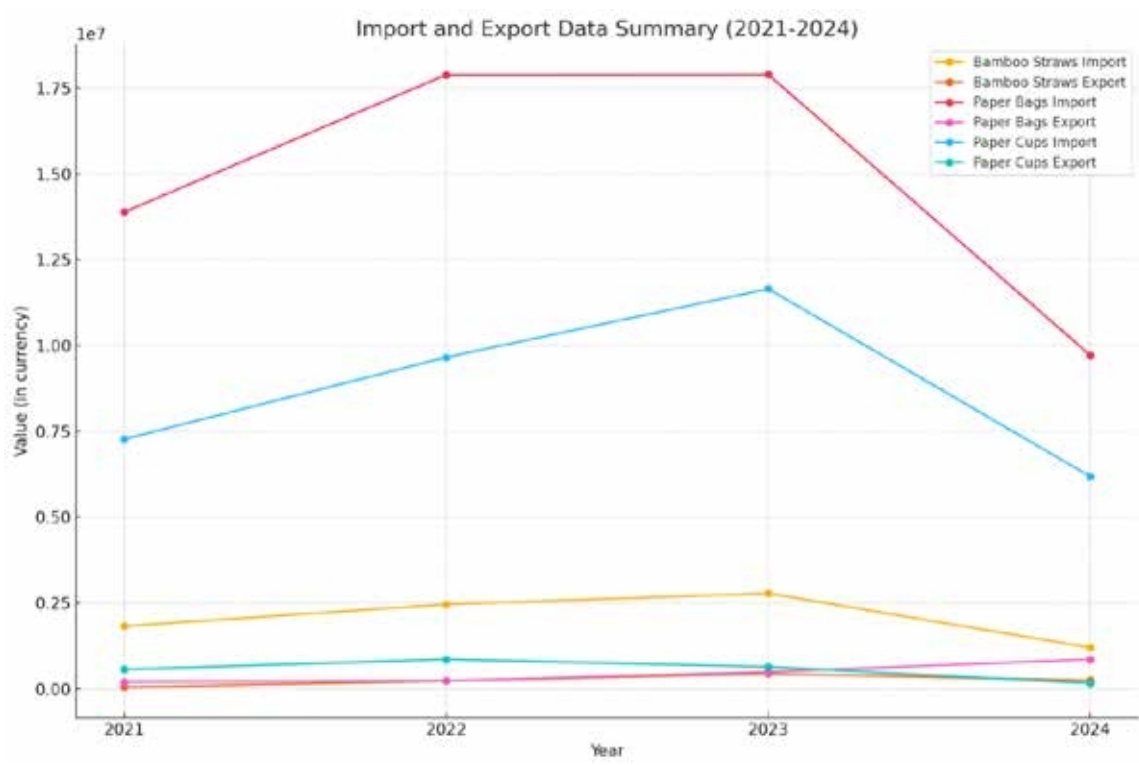
Imports: Steadily increasing, from US\$7.27 million (2021) to US\$11.64 million (2023) (60.1% growth). Indicates an expanding market for paper cups as an alternative to plastic.

Exports (Re-Exports): Significantly increased from US\$566 thousand (2021) to US\$858 thousand (2022), but slightly decreased to US\$641 thousand (2023).

Main Sectors- Retail and dependence on single-use plastic packaging (SPS). Organized retailing-includes supermarkets, grocery stores, convenience stores, and pharmacies:

sector	Category	Economic activity	Dependence on OPU	
Food and drink	Catering activities	Restaurants and cafes	Medium	
		Takeaway	High	
		Street stalls and mobile kiosks	High	
	Activities to provide beverages	Bar	Medium	
		Coffee house	Medium	
		Mobile beverage stands	High	
		Catering	Providing food and beverages at events	Medium
			Provision of food and beverages on a contractual basis	High
	Trade	Wholesale trade related to OPU	Wholesale	High
		Retail sale of medicines	Pharmacy	Low
Retail trade in everyday goods		Retail sale of food and beverages	Medium	
		Online trading	Low	
		Market food and beverage vendors	Low	
Entertainment	Organization of events	Entertainment Center	Low	
Beauty and cosmetics	Cosmetic and hairdressing services	Beauty salon	Low	
		Cosmetology Center	Low	

Year	Import of Bamboo Straws	Export of Bamboo Straws	Import of Paper Bags	Export of Paper Bags	Imports of Paper Cups	Export of Paper Cups
2021	1 823 977,66	48 026,44	13 882 051,07	199 929,71	7 267 851,04	565 768,10
2022	2 457 887,45	229 190,64	17 873 627,46	231 662,26	9 654 862,51	858 089,25
2023	2 778 258,87	441 420,08	17 863 020,41	492 141,87	11 643 179,93	641 268,29
2024	1 199 999,72	243 416,13	9 710 353,48	857 527,01	6 179 120,18	160 606,43



Use of single-use plastic products: plastic shopping bags, cotton swabs (pharmacies), plastic utensils (specialty stores) and a wide range of single-use plastic products in supermarkets.

Food packaging: supermarkets make extensive use of single-use plastic products in food departments, including cups, food containers, cutlery and polystyrene trays.

Unorganized retail trade - includes markets, individual vendors, street vendors and mobile vendors:

Use of single-use plastic items: use of unlabeled plastic bags and goods. Balloon sticks are common among mobile and street vendors.

Characteristics of markets: predominantly small businesses with limited assortment and unbranded goods.

Regulation of oxo-degradable plastics:

Ban: as of 2018, Georgia has banned the import, manufacture and trade of plastic bags made from oxo-degradable plastics.

Compliance problems: some unlabeled products in unorganized retail may be oxo-degradable, but controls are weak and evidence is lacking.

Glasses and lids:

Glasses:

- Alternatives include reusable cups (glass, ceramic, stainless steel,) and disposable non-plastic coated paper cups.
- Glass and ceramic tumblers dominate the market, while plastic and stainless steel tumblers are less available (convenience retailers, specialty housewares and housewares stores, and e-commerce platforms).
- Disposable non-plastic paper cups, without polyethylene coating are not available, no data on their composition or recyclability in Georgia.

Covers:

- Alternatives - reusable lids do not occur
- Reusable silicone lids are found, but they are not suitable for drinking.

Food Containers:

Alternatives: reusable containers (glass, ceramic, stainless steel, plastic) and paper or bagasse containers.

Glass and plastic containers are widely available, while stainless steel is limited and ceramic is not available.

Disposable aluminum containers are common and available

Disposable non-plastic paper containers, without polyethylene coating are not available

Oxo-degradable products:

No oxo-degradable plastic products were found.

Cutlery:

Alternatives: reusable stainless steel cutlery and wooden cutlery (forks, knives, spoons, chopsticks).

Tubes:

Alternatives: reusable tubes (glass, stainless steel) and paper tubes. Paper tubes are the most readily available. Glass and stainless steel tubes are mostly available online or in specialized stores.

Plates:

- Alternatives: reusable ceramic and plastic plates, paper plates and bagasse plates.
- Reusable plastic plates are niche products sold primarily by the
- in camping kits.
- Disposable non-plastic paper plates, no polyethylene coating are available.

Sector - Food and beverages

The food and beverage sector is heavily reliant on single-use plastic products, especially for the provision of takeaway food and beverages. This sector includes restaurants, cafes, bars, fast food outlets, takeaways, street vendors and catering companies.

Categories and Uses:

1. Immediate Consumption:

- Includes restaurants, cafes, bars, fast food and kiosks.
- Commonly used plastic disposables: disposable plates, cutlery, glasses, tubes and food containers.
- Fast food outlets and kiosks rely heavily on single-use plastic because of the need for fast, convenient and economical service.
- Traditional restaurants usually avoid single-use plastics on-site, but use them for food delivery.

2. Catering:

- High-end events: emphasis on quality and image; less likely to use disposable plastic.
- Contract catering: more dependent on single-use plastic for packaging food prepared in large volumes for later consumption (e.g. for airlines, schools, hospitals).

We also researched the top bistro/brasserie style cafes - cafes that offer both on-site and takeaway food. These cafes are popular for eating on-site as well as for home delivery. They are valued for their quick service and healthier food compared to fast food restaurants. Although these cafes are generally considered expensive, their target audience is middle to upper middle income earners. Many of them emphasize on promoting healthy lifestyles and all their branded products are focused on this theme. We also studied popular gym cafes that focus on healthy . The results showed that most of them use paper plates with plastic lids, paper cups for hot drinks and plastic cups for cold drinks. Almost all use plastic cutlery and paper bags for takeaway or delivery food.

Classic restaurants usually use standard tableware and rarely offer delivery services. When delivery does occur, packaging similar to that used in bistro/brasserie style cafes, such as plastic-covered paper plates, is used.

Summary

The increase in plastic consumption correlates with economic growth, which is reflected in the improved financial performance of manufacturers and importers. However, businesses are becoming more eco-friendly, with many companies promoting waste reduction, reuse and offering alternatives to single-use plastic. Many high-end caterers are switching to paper containers, even though they often have a plastic coating, giving consumers the misconception that they are sustainable alternatives.

Recommendations

To effectively reduce the consumption of single-use plastic items, the following measures are recommended:

1. Introduce **taxes on packaging**: Introduce levies on single-use plastic containers, requiring businesses to charge customers for these products. This incentivizes the use of reusable alternatives, such as containers brought from home. To further incentivize reusable options, businesses can offer discounts to customers who bring their own containers.

2. **Banning single-use plastic at public events:** Ban the use of single-use plastic products at public events such as music festivals, allowing only reusable products. This promotes sustainability and encourages vendors to use eco-friendly alternatives for event attendees.
3. **Ban single-use plastics in public institutions:** Introduce a ban on single-use plastics in public institutions and at events organized by public entities. This will set an example for the public and reduce the amount of plastic waste in public organizations.
4. **Promote reusable products in the hospitality sector:** Mandate the use of reusable products for packaging takeaway food. Encourage businesses to use packaging return systems for containers, cutlery and other accessories.

Based on international practices and identified challenges, the following recommendations have been developed to help reduce reliance on single-use plastics and facilitate a transition to more sustainable practices

- When introducing laws for various single-use plastic products, it is preferable to avoid exemptions, especially for "compostable" and "biodegradable" plastic.
- Continually expand the list of single-use plastic items that should be banned by law.
- When banning products, priorities should focus on reusable alternatives instead of switching to single-use products, including those that are plastic-free.
- Introducing a labeling system for alternatives to single-use plastic products will make it easier to identify environmentally friendly options.
- Creating a reporting system accessible through an app that would allow ordinary consumers to report suspicious products would help identify manufacturers providing false information about their products.
- Progressive integration of legally binding requirements into legislation, focusing on specific sectors of the economy that produce and use plastics and plastic goods, to promote safe alternatives.
- Public institutions are a good starting point for banning single-use plastic products.



CONTACTS

Ecovision
Georgia
info@ecovision.ge

Health and Environment Justice Support (HEJSupport)
©HEJSupport
info@hej-
support.org

Follow us on LinkedIn:
<https://bit.ly/3A0L93C>

HEJSupport Website:
www.hej-support.org

More information about the
project:
www.hej-support/ecca-plastic



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