BEYOND PLASTIC MED

The Business College

ConsultantSeas

FIELD STUDY - MARSEILLE

A deliverable from ConsultantSeas for BeMed
August 2020

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Reminders on methodology

Reminders on methodology

We have defined a 3-dimensional methodology to provide answers to the objectives set by BeMed.

The objectives set by BeMed

- Identify the problems specific to the local contexts of the three target areas (Tunisia, Morocco and Lebanon).
- Define the type of actions to be carried out (according to local contexts)
- To map local or international companies in the plastics value chain and identify their role in the identified issues and the link between them.

The 3 dimensions of the methodology

Qualitative interviews + Literature review + In-house expertise

Conclusions of the study

Conclusions of the study

Overview of conclusions

On the local context

On the actions to be carried out

On the identified companies

The qualitative interviews and the documentary analysis can be summarised into 9 main conclusions

On the local context - 7 conclusions

- The regulatory framework governing the use and production of plastics is highly developed.
- Waste management is decentralised, with different levels of governance with clearly defined competences.
- The Southern Region has an ecosystem of committed players with developed know-how.
- Yet France is one of the top 10 plastic-emitting countries in the Mediterranean, and Marseille is one of the pollution hotspots.
- The main sources of this plastic pollution are land-based and are largely the result of tourist activities.
- The Aix-Marseille metropolitan area is below the national average in terms of plastic waste collection and sorting.
- The recycling rate in Marseille is lower than the national average, and the landfill rate is particularly high.

On the actions to be taken - 1 conclusion

- In order to be relevant in Marseille, a project will have to focus on upstream reduction efforts and rely on local partners and the existing situation.

On companies - 1 conclusion

- The waste prevention and management sector is a vector of employment, potentially still undervalued today.

Conclusions of the study

Overview of conclusions

On the local context

On the actions to be carried out

On the identified companies

1 - The regulatory framework governing the use and production of plastics is highly developed.

Some detailed explanations for this conclusion

- At the European level, France has actively participated in the adoption of ambitious European regulations on the circular economy, with the Circular Economy Package and the "Single-use Plastics" Directive.
- At the national level, many laws have been enacted in recent years and national targets have been set:
  - The objectives are ambitious: 5% of packaging reused in 2023, 100% recycled plastic in 2025, halving the quantities of plastic bottles put on the market in 2029.
  - The most recent Anti-Waste and Circular Economy Act (AGEC) was enacted in 2020.
- At the regional level, the PACA region has set up a Regional Waste Prevention and Management Plan (PRPGD), and a zero plastic strategy for 2030.

A verbatim report illustrating this conclusion

> *In addition to the already binding European directives, in Marseille we have a waste management plan and a metropolitan waste management plan.*

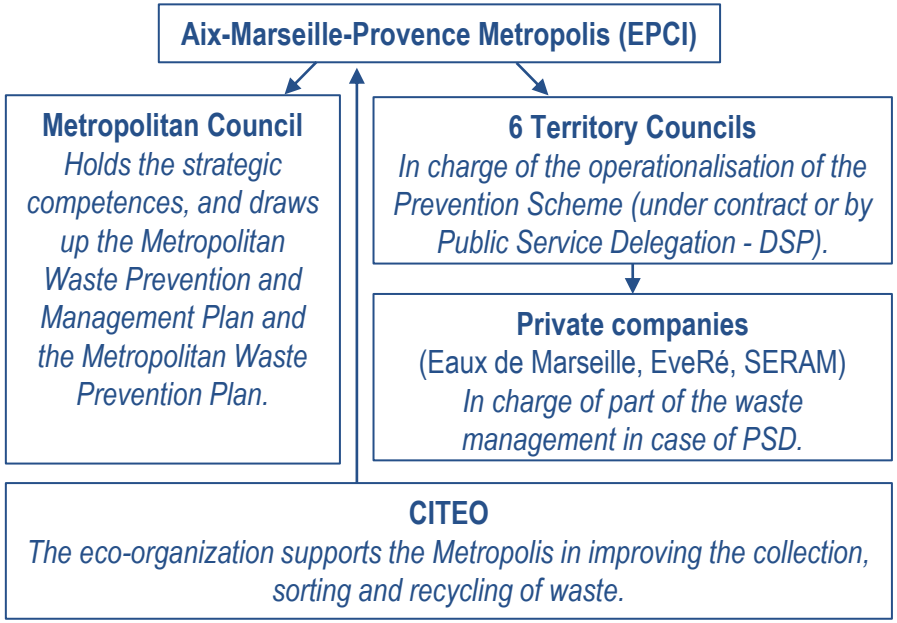
The links to the data that allow us to assert that

In the following paragraphs of the literature review: political and legal context at global, regional and national level, assessment of responsibilities

In the following qualitative interviews : Vincent OCHIER

2 - Waste management is decentralised, with different levels of governance with clearly defined competences.

Some detailed explanations for this conclusion



A verbatim report illustrating this conclusion

> *The waste management system is well organised and there is good collaboration between the different bodies, that's not the problem!*

The links to the data that allow us to assert that

In the following paragraphs of the literature review : political and legal context at national level, assessment of responsibilities.

In the following qualitative interviews : Christine LEUTHY-MOLINA, Cécile SEMERIVA, Philippe BLANQUEFORT, Vincent OCHIER

3 - The Southern Region has an ecosystem of committed players with developed know-how.

Some detailed explanations for this conclusion

- From a historical point of view, the economic development of the Southern Region is marked by an important industrial development in sectors such as food processing, chemicals, shipbuilding but also plastics. This industrial past has endowed the players with a great deal of know-how, particularly in chemistry, which is essential in the field of the circular plastics economy.
- The innovation ecosystem of the Southern Region is particularly dynamic. Innovation is particularly stimulated in the region, especially with regard to developments in the manufacture and use of materials. This is reflected in the presence of numerous competitiveness clusters and research laboratories, supported by grandes écoles and numerous citizen initiatives. Finally, this ecosystem favours the deployment of a circular economy.

A verbatim report illustrating this conclusion

> ***Our region has always drained "brains" thanks to attractive scientific and economic poles, this dynamic is increasingly serving ecology.***

The links to the data that allow us to assert that

In the following paragraphs of the literature review: economic context

In the following qualitative interviews : Christine LEUTHY-MOLINA, Cécile SEMERIVA, Philippe BLANQUEFORT, Vincent OCHIER

4 - However, France is one of the top 10 plastic-emitting countries in the Mediterranean, and Marseille is one of the pollution hotspots.

Some detailed explanations for this conclusion

- France is the Mediterranean country producing the most plastic waste, with 4.5 million tonnes (MT) of plastic waste each year. 2.5 MT come from the packaging industry.
- Of the 2% of this plastic waste that is not collected, 80,000 tonnes end up in nature, and 11,200 tonnes in the Mediterranean each year.
- The main pollution hotspots are: the Gulf of Marseille, the Rhone delta and the city of Nice.
- It is estimated that there are 1,000 square kilometres of debris on the surface in the Bay of Marseille.
- Despite the efforts made, there is a lack of awareness among coastal users of the issues related to plastic pollution.

A verbatim report illustrating this conclusion

> ***Despite all the measures in place, we remain an extremely polluting country and Marseille is one of the metropolises where the sorting gesture is the least ingrained.***

The links to the data that allow us to assert that

In the **following paragraphs of the literature review:** economic context, state of play of collection, sorting and recycling systems, main sources of pollution, hot spots of leakage

In the following qualitative interviews : Christine LEUTHY-MOLINA, Philippe BLANQUEFORT, Isabelle POITOU, Carole CARPENTIER, Patricia RICARD

5 - The main sources of this plastic pollution are land-based and are largely the result of tourist activities.

Some detailed explanations for this conclusion

- More than 90% of plastic pollution in the Mediterranean comes from land-based sources: 79% of this pollution originates from coastal activities (especially tourism and leisure activities). In addition, 12% of plastic pollution is dredged by French rivers, particularly the Rhône.
- During the summer season, when tourists flock, the amount of rubbish on the beaches and especially in the creeks increases considerably.
- About 45% of the most common waste found on the French Mediterranean coast is plastic. The vast majority is made up of cigarette butts, plastic bottles and bags, and various plastic and polystyrene fragments smaller than 50 cm.
- The economic cost of plastic pollution in France amounts to €73 million.

A verbatim report illustrating this conclusion

> *In summer, tourists flock to the area and throw a lot of rubbish into the countryside, which goes straight to the sea at the first heavy rainfall.*

The links to the data that allow us to assert that

In the following paragraphs of the literature review: economic impacts, land vs. marine sources, types of products concerned, leakage hotspots

In the following qualitative interviews : Philippe BLANQUEFORT, Patricia RICARD, Isabelle POITOU.

6 - The Aix-Marseille metropolitan area is below the national average in terms of plastic waste collection and sorting.

Some detailed explanations for this conclusion

- On the territory of Marseille-Provence, we sort 3 times less than at the national level. The reasons are as follows:
  - The collection system on the territory is complex and not homogeneous according to the municipalities.
  - Some of the reasons for the sorting deficit are the strong tourist vocation of the region, which is the 2nd largest tourist basin in France, but also the large part of the regional population - 17% - living below the poverty line. Finally, 50% of the territory is mountainous, which makes the organisation of collection and sorting more complex.
- In order to stimulate sorting at source, the CITEO eco-organisation has launched the "You sort, we recycle" programme and plans to extend and simplify the sorting deposit by 2022.
- Private initiatives such as Lemon Tri and Terradona are developing deposit incentive schemes to change practices and encourage users to sort more.

A verbatim report illustrating this conclusion

> ***The South Region is unfortunately the French region with the worst results in terms of waste collection, sorting and recovery .***

The links to the data that allow us to assert that

In the following paragraphs of the literature review :
Inventory of waste management, collection, sorting and recycling systems.

In the following qualitative interviews : Christine LEUTHY-MOLINA, Philippe BLANQUEFORT, Sébastien DELANNOY, Alexandre NOBLET, Vincent OCHIER, Carole CARPENTIER

7 - The recycling rate in Marseille is lower than the national average, and the landfill rate is particularly high.

Some detailed explanations for this conclusion

- In Marseille, the performance in terms of recycling is lower than the French level:
  - More specifically, in France, only 27% of plastic packaging is recycled, compared to a European average of 42%. Marseilles recycles a third less packaging than the national level.
  - Plastic packaging that is currently recycled in large quantities are bottles (PET) and flasks (PE).
- The rate of landfill is very high in the PACA region and notably in Marseille (40%). Numerous open-air landfills exist on the territory.
- The rates of landfilling and incineration of plastic waste are also high: in France 32% of waste is incinerated in Marseille and 32% is buried (compared to 37% and 34% respectively in France).

A verbatim report illustrating this conclusion

> *In Marseilles we lag behind the rest of France, and even more so in the rest of Europe, in terms of plastic waste recycling.*

The links to the data that allow us to assert that

In the following paragraphs of the literature review : Economic impacts, land vs. marine sources, types of products concerned, leakage hotspots.

In the following qualitative interviews : Christine LEUTHY-MOLINA

Conclusions of the study

Overview of conclusions

On the local context

On the actions to be carried out

On the identified companies

8 - In order to be relevant in the Marseille area, a project will have to focus on upstream reduction efforts and rely on local partners and the existing situation.

Some detailed explanations for this conclusion

- Actions should focus on reducing the use of plastics rather than improving waste management.
- Many private initiatives, supported by the local authorities, exist and should inspire any new project set up in the area. Firstly, it is a question of seeing what needs to be duplicated or improved, in collaboration with local actors.
  - Synergies must be sought simultaneously with committed large groups and innovative local start-ups.
  - Citeo, which encourages entrepreneurs and assists in the deployment of projects in the metropolis, is an essential partner.
  - All projects must obtain the support of the Aix-Marseille Metropolis, which is committed to a genuine "Zero Waste Territory" approach.
- Awareness-raising and communication work must be undertaken with the population, particularly young people but also tourists, in order to ensure the successful implementation of a project.

A verbatim report illustrating this conclusion

> *There are a lot of actors working on the subject of pollution in the region, and they are very innovative, and we have to be careful not to reinvent hot water.*

The links to the data that allow us to assert that

In the following paragraphs of the literature review: social context, economic context, state of the art of the sorting channels

In the following qualitative interviews : Christine LEUTHY-MOLINA, Cécile SEMERIVA, Vincent OCHIER, Carole CARPENTIER, Patricia RICARD

The project sheets were constructed from 3 types of sources, which made it possible to keep only the relevant proposals.

Qualitative interviews

We have based ourselves on the solution paths resulting from the qualitative interviews to ensure that the projects we propose are compatible with the local context.

Documentary study / Internal expertise

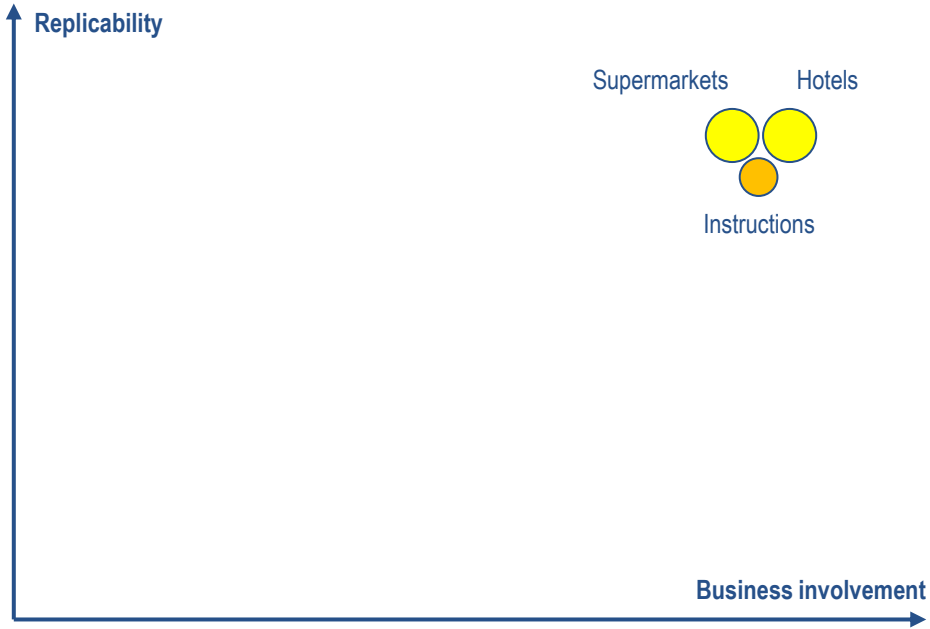
We compared the leads from the qualitative interviews with the results of the documentary study and our internal analysis frameworks to pre-select the best projects.

Pilot Projects WG of 7 July 2020

We have included in our reflection the results of this working group: the ideas put forward were included for Marseille and Tunisia and served as inspiration for Morocco and Lebanon.

According to the data collected, projects to reduce the use of single-use plastics in supermarkets or hotels are the most relevant.

Project Evaluation Matrix1



1 Matrix resulting from the consolidation of the project sheets drawn up for this geographical area.

How to read the matrix?

Our evaluation of the projects is purely qualitative and based on the information gathered during the qualitative interviews and the "pilot projects" working group, which by definition are subjective and not exhaustive. However, we were able to position the projects in relation to each other according to 4 criteria.

Replicability, represented on the vertical axis: it is "very strong" if the project is replicable to 3 other zones, "strong" if it is replicable to 2 other zones, "medium" if it is replicable to 1 other zone and "weak" otherwise.

Business involvement, represented on the horizontal axis: it is "very strong" if 4 links of the plastics value chain are operationally involved, "strong" if 3 links are involved, "medium" if 2 links are involved and "weak" if only 1 link is involved.

Feasibility, represented by the colour of the dot: it is "very strong" (green) if potential partners have been contacted and are interested, "strong" (yellow) if potential partners have been identified, "medium" (orange) if there is a non-structural brake on implementation (social or economic or technical) and "weak" (red) if there is a structural brake on implementation.

The impact (cf. waste management pyramid), represented by the size of the point: it is "very strong" if it concerns reduction efforts, "strong" if it concerns reuse efforts, "medium" if it concerns energy recovery and landfill, and "weak" if the project concerns a very low volume of pollution.

Description of the project

Hotels

Project summary: reduce the use of single-use plastics in the different functions of a hotel (rooms, restaurant and bar, reception, maintenance, swimming pool, sports hall, etc.) For example, replace cosmetic samples in the rooms with washable and reusable bottles.

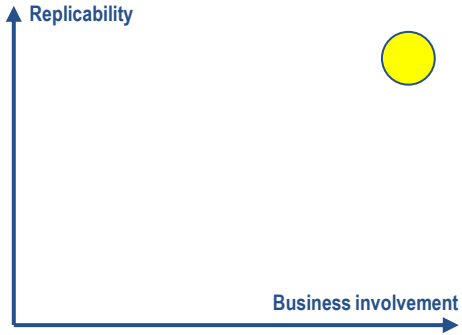
Similar projects
TUI guidelines; Accor experience

Key success factors for the project

The venue could be a consortium of hotels (Accor) or one of the 5 tourist districts of Marseille (Gare St-Charles; Prado; Port; Centre; Pharo).

Contacts to be built on would be WWF and alternative providers Anacaona and Cozie.

Elements of project evaluation



Very strong re**plicability (vertical axis)** because it can be replicated in Tunisia, Lebanon and potentially in Morocco.

Strong **business involvement (horizontal axis)**: hotel chains, brands and converters (SBM, Chanel)

Strong **feasibility (colour)** because potential partners for implementation have been identified

Very strong **impact (size of the point)** because it focuses on reduction efforts (base of the waste pyramid)

Description of the project

Supermarkets

Project summary: Demonstrating in a supermarket that single-use plastic packaging can be dispensed with by working on reusability and bulk solutions (e.g. bulk candy).

Similar projects

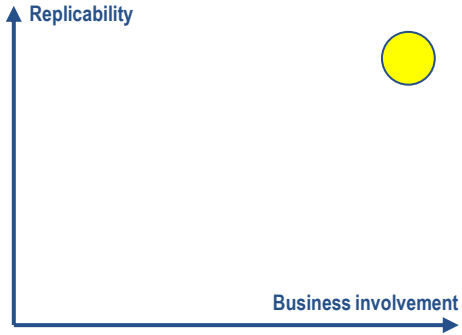
Loop; Zero-waste online shops

Key success factors for the project

The location could be in one or more supermarkets of the Carrefour retail chain.

The contacts to be relied on would be Carrefour Sud-Est, as well as the alternative supplier Cozie

Elements of project evaluation



Very strong re**plicability (vertical axis)** as it can be replicated in Lebanon, Morocco and potentially Tunisia.

Strong **business involvement (horizontal axis)**: brands, converters and retailers (Carrefour, Haribo)

Strong **feasibility (colour)** because potential partners for implementation have been identified

Very strong **impact (size of the point)** because it focuses on reduction efforts (base of the waste pyramid)

Description of the project

Instructions

Project summary: To offer machines to collect plastic bottles (and other plastic products in the long run) from supermarkets and places of transit and to distribute rewards in return.

Similar projects

Deposit Return Scheme de Plastic Smart Cities (International) ; Reverse Vending Machines de Spinneys (Liban) ; Cliiink de Terradona (France)

Key success factors for the project

The location could be in one or more supermarkets of the Carrefour retail chain.

The contacts on which to rely on would be the start-ups Terradona and Lemon Tri

Elements of project evaluation

Very strong re**plicability (vertical axis)** the concept is replicable in Tunisia (Kerkennah), Lebanon and Morocco.

Strong **business involvement (horizontal axis)**: brands, retailers and recyclers (Chanel, Haribo, Carrefour)

Average **feasibility (colour)** following the virulent debate on the deposit in France (AGEC law)

Impact (size of point) strong because focused on recycling efforts (middle of the waste pyramid)

Conclusions of the study

Overview of conclusions

On the local context

On the actions to be carried out

On the identified companies

8 - The waste prevention and management sector is a vector of employment, potentially still undervalued today.

Some detailed explanations for this conclusion

- A quarter of the environmental trades are related to waste management.
- The challenges for the waste processing and recovery sector are the lack of image, the lack of knowledge of new trades, and the need to train the various players in the new collection, sorting and recycling objectives.
- It is necessary to generalise the introduction of modules on limiting and reusing resources in training courses.
- Citizen involvement within environmental associations in Marseille reflects the desire of the inhabitants to promote more sustainable consumption. Many of them wish to combine their ecological convictions with their professions.
- Several private initiatives, supported by the Metropolis and eco-organisations - notably CITEO - are innovating in order to offer eco-design solutions for products or the recovery of plastic waste.

A verbatim report illustrating this conclusion

> *In addition to the need for good waste management systems, it is a dynamic sector of activity in terms of employment and full of positive externalities!*

The links to the data that allow us to assert that

In the following paragraphs of the literature review: social context, additional existing sources

In the following qualitative interviews : Christine LEUTHY-MOLINA, Cécile SEMERIVA, Philippe BLANQUEFORT, Isabelle POITOU

In order to ensure the solidity of the information collected, we crossed 3 types of sources for the mapping.

Web / Internet

We relied on public databases such as the members of the *Loop* project and studied the website of each company.

Studies and data made available

We based our analysis on the lists of companies provided to us by certain stakeholders, as well as on the targeting work done for the College in 2019 and 2020.

Recommendations

We have integrated all the recommendations made to us during the qualitative interviews and by the current members of the Works Council.

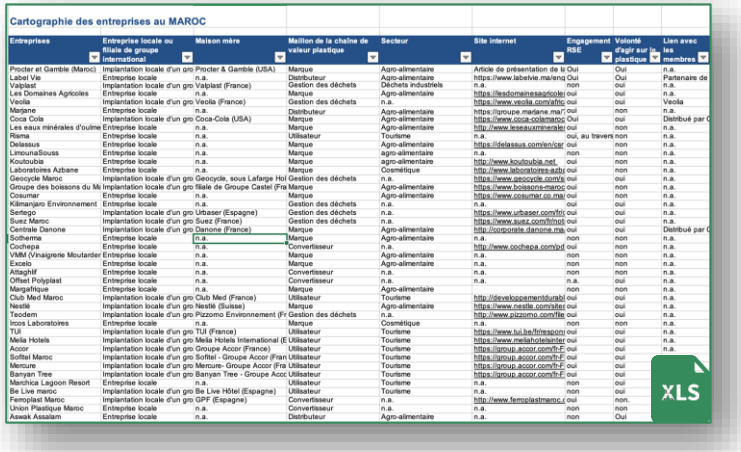
The complete mapping lists 60 companies, classified according to all the criteria listed in the specifications.

Content overview

- The 60 companies are classified according to the criteria defined by BeMed in the study's specifications :
  - CSR commitments and/or stated willingness to act (with a link to the corresponding website page)
  - All the levels of the plastic packaging value chain with a focus on the tourism, cosmetics and agro-food sectors
  - Accessibility and ease of contact (contact person and contact details are provided as soon as possible)
  - Consistency with the College's member companies (the links with the companies that are members of the College are explained)
  - Link with the priority issues identified at the end of the context analysis (via correspondence with the project sheets)
- We have added the following information:
  - Local company or subsidiary of an international group (and parent company)
  - Source of information (see previous slide)

Where can I find the complete cartography?

- The complete mapping is available in Excel format and was sent to you in parallel with this deliverable.
- The Excel format allows easy navigation via the filters available for each column.


Cartographie des entreprises au MAROC

Entreprises	Entreprise locale ou filiale de groupe international	Maison mère	Maillon de la chaîne de valeur plastique	Secteur	Site internet	Engagement RSE	Volonté d'agir sur le plastique	Lien avec les membres
Procter et Gamble (Maroc)	Implantation locale d'un gro	Procter & Gamble (USA)	Marque	Agro-alimentaire	Article de présentation de la	Oui	Oui	n.a.
Label Vie	Entreprise locale	n.a.	Distributeur	Agro-alimentaire	https://www.labelvie.ma/eng	Oui	Oui	Partenaire de
Valplast	Implantation locale d'un gro	Valplast (France)	Gestion des déchets	Déchets industriels	n.a.	non	oui	n.a.
Les Domaines Agricoles	Entreprise locale	n.a.	Marque	Agro-alimentaire	https://lesdomainesagricoles	oui	oui	n.a.
Veolia	Implantation locale d'un gro	Veolia (France)	Gestion des déchets	n.a.	https://www.veolia.com/afric	oui	oui	Veolia
Marjane	Entreprise locale	n.a.	Distributeur	Agro-alimentaire	https://groupe.marjane.ma/?	oui	non	n.a.
Coca Cola	Implantation locale d'un gro	Coca-Cola (USA)	Marque	Agro-alimentaire	https://www.coca-colamaroc	Oui	oui	Distribué par C
Les eaux minérales d'oulme	Entreprise locale	n.a.	Marque	Agro-alimentaire	http://www.leseauxminerales	oui	non	n.a.
Risma	Entreprise locale	n.a.	Utilisateur	Tourisme	n.a.	oui, au travers	non	n.a.
Delassus	Entreprise locale	n.a.	Marque	Agro-alimentaire	https://delassus.com/en/cer	oui	non	n.a.
LmounaSlouss	Entreprise locale	n.a.	Marque	agro-alimentaire	n.a.	non	non	n.a.
Koutoubia	Entreprise locale	n.a.	Marque	agro-alimentaire	http://www.koutoubia.net	oui	non	n.a.
Laboratoires Azbane	Entreprise locale	n.a.	Marque	Cosmétique	http://www.laboratoires-azby	oui	non	n.a.
Geocycle Maroc	Implantation locale d'un gro	Geocycle, sous Lafarge Hol	Gestion des déchets	n.a.	https://www.geocycle.com/s	oui	oui	n.a.
Groupe des boissons du Ma	Implantation locale d'un gro	filiale de Groupe Castel (Fra	Marque	Agro-alimentaire	https://www.boissons-maroc	oui	non	n.a.
Cosumar	Entreprise locale	n.a.	Marque	Agro-alimentaire	https://www.cosumar.co.ma/	oui	non	n.a.
Kilimanjaro Environnement	Entreprise locale	n.a.	Gestion des déchets	n.a.	n.a.	oui	oui	n.a.
Serfego	Implantation locale d'un gro	Urbaser (Espagne)	Gestion des déchets	n.a.	https://www.urbaser.com/fr/	oui	oui	n.a.
Suez Maroc	Implantation locale d'un gro	Suez (France)	Gestion des déchets	n.a.	https://www.suez.com/fr/not	oui	oui	n.a.
Centrale Danone	Implantation locale d'un gro	Danone (France)	Marque	Agro-alimentaire	http://corporate.danone.ma/	oui	oui	Distribué par C
Solthema	Entreprise locale	n.a.	Marque	Agro-alimentaire	n.a.	non	non	n.a.
Cochepa	Entreprise locale	n.a.	Convertisseur	n.a.	http://www.cochepa.com/pol	oui	non	n.a.
VMM (Vinaigrerie Moutarder	Entreprise locale	n.a.	Marque	Agro-alimentaire	n.a.	non	non	n.a.
Excelo	Entreprise locale	n.a.	Marque	Agro-alimentaire	n.a.	non	non	n.a.
Attaghlif	Entreprise locale	n.a.	Convertisseur	n.a.	n.a.	non	non	n.a.
Offset Polyplast	Entreprise locale	n.a.	Convertisseur	n.a.	n.a.	oui	oui	n.a.
Margafrique	Entreprise locale	n.a.	Marque	Agro-alimentaire	n.a.	non	non	n.a.
Club Med Maroc	Implantation locale d'un gro	Club Med (France)	Utilisateur	Tourisme	http://developpementtouristi	oui	oui	n.a.
Nestlé	Implantation locale d'un gro	Nestlé (Suisse)	Marque	Agro-alimentaire	https://www.nestle.com/site/	oui	oui	n.a.
Teodem	Implantation locale d'un gro	Pizzorno Environnement (Fr	Gestion des déchets	n.a.	http://www.pizzorno.com/fle	oui	oui	n.a.
Inoss Laboratoires	Entreprise locale	n.a.	Marque	Cosmétique	n.a.	non	non	n.a.
TUI	Implantation locale d'un gro	TUI (France)	Utilisateur	Tourisme	https://www.tui.be/fr/respon	oui	oui	n.a.
Melia Hotels	Implantation locale d'un gro	Melia Hotels International (E	Utilisateur	Tourisme	https://www.meliahotelsinter	oui	oui	n.a.
Accor	Implantation locale d'un gro	Groupe Accor (France)	Utilisateur	Tourisme	https://group.accor.com/fr-F	oui	oui	n.a.
Sofitel Maroc	Implantation locale d'un gro	Sofitel - Groupe Accor (Fran	Utilisateur	Tourisme	https://group.accor.com/fr-F	oui	oui	n.a.
Mercure	Implantation locale d'un gro	Mercure- Groupe Accor (Fra	Utilisateur	Tourisme	https://group.accor.com/fr-F	oui	oui	n.a.
Banyan Tree	Implantation locale d'un gro	Banyan Tree - Groupe Accc	Utilisateur	Tourisme	https://group.accor.com/fr-F	oui	oui	n.a.
Marchica Lagoon Resort	Entreprise locale	n.a.	Utilisateur	Tourisme	n.a.	non	oui	n.a.
Be Live maroc	Implantation locale d'un gro	Be Live Hôtel (Espagne)	Utilisateur	Tourisme	n.a.	non	oui	n.a.
Femoplast Maroc	Implantation locale d'un gro	GPF (Espagne)	Convertisseur	n.a.	http://www.femplastmaroc.c	oui	non.	n.a.
Union Plastique Maroc	Entreprise locale	n.a.	Convertisseur	n.a.	n.a.	non	non	n.a.
Aswak Assalam	Entreprise locale	n.a.	Distributeur	Agro-alimentaire	n.a.	non	Oui	n.a.

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