



INDUSTRY STUDIES UPDATE

Plastics

October 2025

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This update reviews changes in the plastics industry, focussing on production, recycling, trade, technology and regulation.

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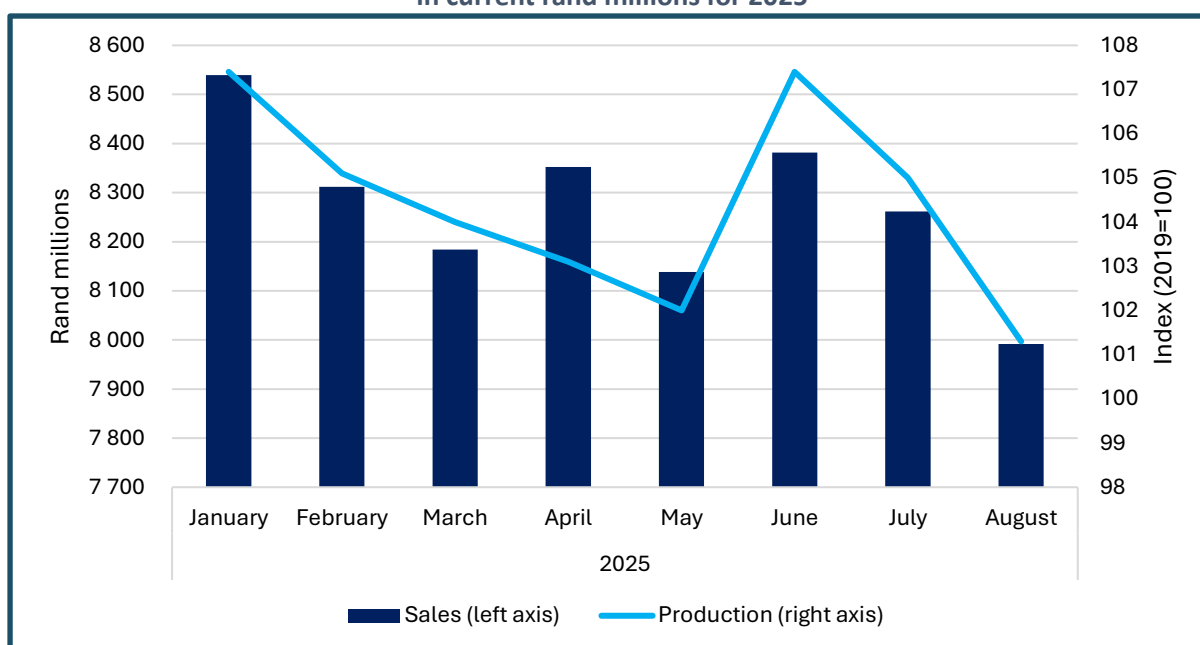
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CHANGES IN PRODUCTION, TRADE AND RECYCLING

South Africa's plastics industry is relatively modest on the global stage, accounting for less than 0.4% of worldwide polymer production, but it remains the largest in Sub-Saharan Africa. Plastics SA (2024b) notes that 1.6 million tons of virgin polymers in 2023 were used in producing plastics across diverse sectors.

Between January and August in 2025, the monthly plastic production index (2019 = 100), shows that production levels were above the 2019 baseline (pre-COVID). Production peaked in January and June, indicating a 7% increase compared to 2019. After a gradual decline from January to May, production rebounded in June before slightly dropping to 101 in August, still marginally above 2019 levels (see Graph 1). Plastic sales were on a downward trend over the same period. Starting at almost R9 billion in January, sales fluctuate slightly but overall decrease to approximately R8 billion by August (Stats SA, 2025).

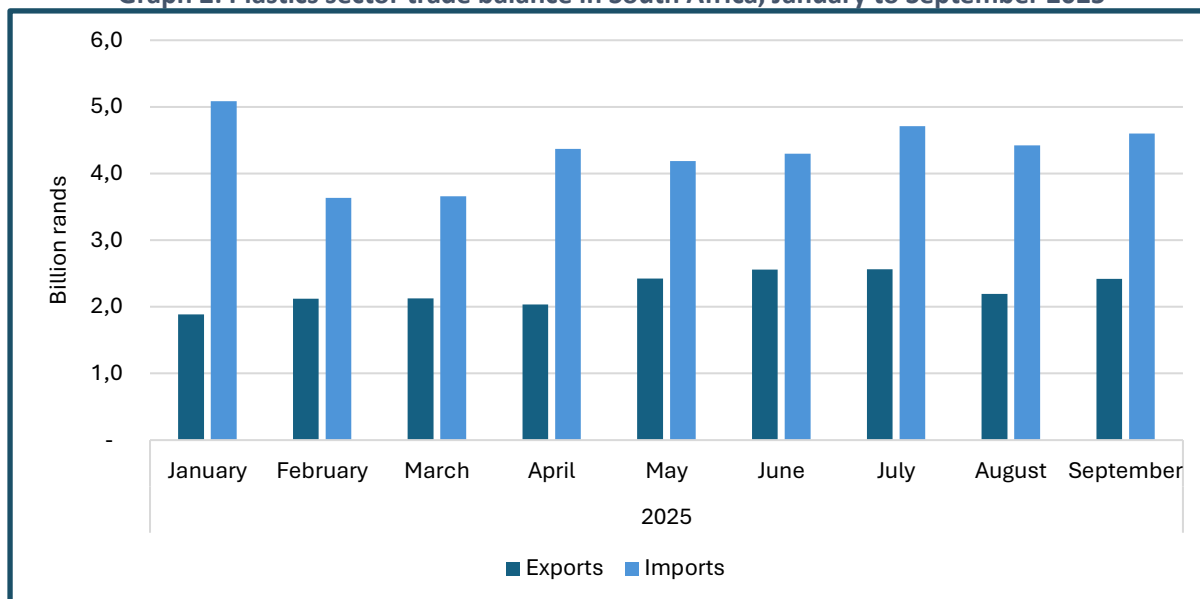
Graph 1: South Africa's monthly production index and seasonally adjusted sales in current rand millions for 2025



Source: Calculated from Statistics South Africa. Manufacturing Production and Sales. Excel Spreadsheet. Downloaded from www.statssa.gov.za in October 2025.

Between January and August in 2025, South Africa's plastics sector showed a consistent trade deficit. Export values remained relatively stable, ranging between R1.9 billion and R2.6 billion. In contrast, imports fluctuated between R3.6 billion and R5.1 billion. The highest import levels were early in the year. The "reciprocal" tariffs imposed by the United States on South Africa had no significant effect on the plastic sector's trade balance. Overall, the data highlights an import-driven plastics market (ITC, 2025).

Graph 2: Plastics sector trade balance in South Africa, January to September 2025



Source: Calculated from ITC Trade Map data. Downloaded from <https://www.trademap.org> in September 2025.

In the latter part of 2024, Plastics SA published its most recent report detailing polymer consumption and recycling statistics from their 2023 survey. Notably, 6.2% (approximately 17) of the 273 recycling facilities shut down in 2022. However, in the same year, 39 new companies were established, pointing to both opportunities and challenges within the sector (Plastics SA, 2024b). In part, the challenges for the recycling sector arise from global oversupply of polymers, which led to a fall in prices, therefore impacting on recycling (Phillips, 2025).

Plastics recycled increased to 431 800 tons in 2023, compared to 368 800 tons the previous year. This improvement pushed the input recycling or collection rate up to 52% in 2023, a rise from 43% in 2022. During the same period, the output recycling rate climbed to almost 28% from 23% (Plastics SA, 2024b)¹. This placed South Africa as a frontrunner in mechanical plastics recycling, surpassing some developed countries in the processing of challenging materials such as thin polyethylene films and contaminated post-consumer plastics (Plastics SA, 2024b).

The recycling industry continues to be a vital employment generator, especially within the informal economy, sustaining approximately 95 900 income opportunities that include waste pickers and small-scale entrepreneurial collectors (Plastics SA, 2024b). Including the informal sector, the industry contributed over R4.7 billion to the supply chain through the collection of 671 200 tons of plastics for recycling (Plastics SA, 2024b).

TECHNOLOGY CHANGES

PlastiColors² is promoting a technology called EcoPure, which is a biodegradable polymer additive that could transform the plastics industry. EcoPure takes a novel approach to making traditional plastics biodegradable by attracting microbes. When exposed to microbe-rich environments like landfills or oceans, the additive encourages microbes to take over the plastic and break it down as they feed

¹ The input rate is the percentage of collected waste that is sent to be recycled, while the output rate is the percentage of that collected material that is successfully processed and sold as new raw material.

² PlastiColors is one of the leading producers of colourants and additives in South Africa for plastics.

on it. Unlike additives that cause the polymer itself to degrade, EcoPure simply invites microbes to naturally decompose the material. In addition, EcoPure is cost-effective, adding only a minimal expense to conventional plastics, making it more affordable than bioplastics, which tend to be much more costly (PlastiColors, n.d).

There have also been developments in medical diagnostic kits. Conventional medical diagnostic kits take an extremely long time to break down. These kits are designed for single use and are discarded immediately after use, adding to plastic waste. Researchers in Pretoria are developing compostable, plant-based alternatives that can replace these non-recyclable single-use items. After use, the compostable version can simply be buried in home compost, where it will fully degrade within six to seven months. The work extends beyond diagnostic kits to include compostable solutions for biomedical, agricultural, and food-packaging applications. These sustainable materials are produced partly from locally sourced biomass, such as starch and cellulose, and are designed to biodegrade under both home and industrial composting conditions (Bega, 2024).

REGULATORY CHANGES

At the global policy level, South Africa's plastic packaging sector is increasingly influenced by the European Union's Packaging and Packaging Waste Regulation, enacted in February 2025. The regulation requires all packaging to be fully recyclable in design and practice by 2030, posing both opportunities and challenges for South African exporters (European Commission, n.d.). While local manufacturers have already invested in technology, skills, and infrastructure to increase recycled content and maintain international market access, compliance costs and uneven recycling capacity continue to pose barriers (Plastics SA, 2025).

Domestically, environmental governance is being reshaped by the Climate Change Act, No. 22 of 2024, which establishes South Africa's overarching framework for climate mitigation and requires all sectors, including plastics manufacturing and recycling, to align with national climate objectives (Colegrave, 2024). This places greater pressure on the plastics sector to reduce emissions and adopt circular economy models, particularly given its contribution to waste and pollution. Industry initiatives such as the South African Plastics Pact, a consortium of more than 50 organisations working to improve recyclability and reduce plastic waste, reinforce these goals (South African Plastics Pact, n.d.). However, full implementation and enforcement timelines for the Climate Change Act are still pending (South African Government, 2024).

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