



The Canadian EPR Forum

PRO Alliance Overview

Driving
collaboration
to facilitate
a circular
economy

DRIVING COLLABORATION TO FACILITATE A CIRCULAR ECONOMY

Purpose

The PRO Alliance exists to facilitate collaboration by PROs on matters regarding the EPR regulations and areas of mutual interest and benefit.



PRO Alliance – not because it is easy



The Extended Producer Responsibility Mandate

EPR Regulations: A Multi-Stakeholder process including government & regulators, industry & producers, waste pickers & the informal sector.

South Africa's Extended Producer Responsibility (EPR) regulations require producers to take responsibility for products post-consumption, including collection, recycling, and recovery. **There are 53 registered PROs across South Africa. Consumer Goods Council Of South Africa** has now also registered as a PRO and has a single member.

Individual Producer Responsibility Organisations (PROs) are the primary implementing agents of these regulations. They are tasked with achieving ambitious recycling targets using fees collected from producers.



The Alliance's Role

The PRO Alliance facilitates collaboration among member Producer Responsibility Organisations (PROs) on Extended Producer Responsibility (EPR) regulations and matters of mutual benefit in meeting their legislative obligations.

Department of Forestry Fisheries and the Environment (DFFE) is the primary regulator.
A single EPR system across South Africa.

What EPR expects

The EPR system implicitly assumes

Coordination across producers

Shared infrastructure

Comparable targets and reporting

A degree of standardisation
and mutual reliance

paper & packaging



Tension

PROs

PROs were created as

Independent legal entities

Competing for members,
credibility, and performance

Accountable primarily to their
own boards and producers, not
peers

Structurally, EPR pushes towards collective behaviour, while PRO governance pulls towards autonomy. Multiple ministries and departments with overlapping legislation can conflict with EPR regulations. We lobby and advocate on behalf of members.

PRO Alliance – not because it is easy



Alignment depends on trust, mandate clarity, and perceived value

Not a regulator

Not a parent body

Not a service provider
(in the classic sense)

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A voluntary coalition of equals

With asymmetric size, budgets, maturity, and risk exposure

Operating under shared regulatory pressure

Authority is soft



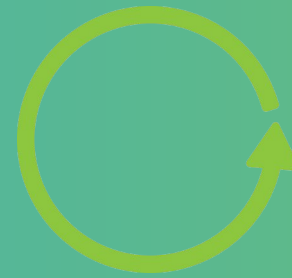
Compliance is also social and political, not just legal.

Most important lessons learnt

Collaboration is critical to success

Acknowledge that there is work to be done but celebrate achievements along the way. Disagreement doesn't make us enemies. Robust debates helps us learn, grow, and understand each other.





Waste Picker Integration

SAWPRS & BBC Project Implementation

Waste Picker Support - BBC 200 Project



SAWPRS REGISTRATIONS

17 807

Unique waste-picker registrations on SAWPRS*

SAWPRS VERIFICATIONS

11 907

Registrations independently verified*

BUY-BACK CENTRES

50

BBCs in the PRO Alliance BBC200 WPI initiative

WPSF COVERAGE

Waste pickers able to receive WPSF vs. those currently receiving it:



16 545 of 17 090 eligible waste pickers receiving WPSF (96.8%)

SERVICE FEES PAID

~R820 000

Paid to waste pickers via the BBC200 project**

Note

Data reporting up until August 2026

*SAWPRS has been active since January 2022

**BBC200 Project has been active since June 2025



The State of Extended Producer Responsibility

The PRO Perspective

Overview: Waste Economy & Recycling Sector

STRENGTHEN MUNICIPAL COLLECTION

Improve the reliability and effectiveness of municipal waste collection and separation systems to increase the volume and quality of recyclable materials entering the formal value chain.

ALIGN & STREAMLINE REGULATION

Review and align the multiple pieces of legislation governing waste, recycling and EPR to reduce overlap, uncertainty and administrative delays.

ACCELERATE EPR FEE CONCURRENCE

Expedite the concurrence and approval process for EPR fees. Delays constrain forward planning and investment in infrastructure and reclaimer support.

DEVELOP DOMESTIC OFFTAKE MARKETS

Support investment in local processing capacity and stronger domestic markets for recyclable materials, retaining value and reducing reliance on exports.

CREATE GREATER INVESTMENT CERTAINTY

Provide a predictable policy and regulatory environment that enables long-term private-sector investment in collection, infrastructure and technology.



Requirements for Waste & Recycling Projects

RELIABLE FEEDSTOCK

Consistent volumes and quality of recyclable material are essential to keep facilities operating at viable capacity.

SUSTAINABLE OFFTAKE MARKETS

Reliable, long-term demand and competitive pricing for recovered materials.

APPROPRIATE INFRASTRUCTURE

Facilities and technology must be matched to available feedstock, local conditions and targeted materials.

SOUND OPERATING ECONOMICS

A realistic business model accounting for collection, sorting, processing, logistics, labour, energy and market costs.

COMPETENT MANAGEMENT & OPERATIONS

Strong technical, commercial and operational capability is critical to consistent performance.

LONG-TERM FUNDING

Patient, long-term capital and sufficient working capital to manage market and operational volatility.



EPR Funding, PRO Structure & Community Projects

STRENGTHENING EXISTING SYSTEMS

EPR funding should strengthen existing collection systems rather than create parallel ones. PROs now support waste-picker service fees, buy-back and aggregation infrastructure, training, PPE, digitisation and market development.

THE FEE CONCURRENCE RISK

Slow EPR fee concurrence compromises PRO revenue certainty and the ability to plan and commit funding to longer-term collection, recycling and infrastructure initiatives.

THE SAME-SUBSTRATE RISK

Multiple PROs competing within the same substrate can drive downward fee competition rather than environmental performance — weakening funding and distorting the market for the same finite pool of recyclable material.

WHAT EPR SHOULD ENCOURAGE

Collaboration, additionality and improved national recycling performance — not competition for recyclables that are already being collected.



Summary and why EXPRA membership:

South Africa is often a leader in Africa.

Our EXPRA membership is fundamentally about strategic value. It gives PRO Alliance access to international experience and a network of peer organisations, but the relationship is not one-way. We also bring South African experience to the table, particularly our work around inclusive EPR implementation and the informal sector.

The opportunity is to take what is relevant from international practice, adapt it to our context, and use those relationships and insights to strengthen outcomes here in South Africa.

So for me, EXPRA is not simply a membership. It is a platform for learning, collaboration, contribution and ultimately impact.



Thank you



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