

# OMAN'S PLASTIC WASTE CHALLENGE WHERE DOES THE GROWTH OPPORTUNITIES LIE?

How is Oman driving transformation through innovation, and systemic shifts?

## WHAT IS DRIVING PLASTIC WASTE GENERATION IN OMAN TODAY?

Total Waste Generated:



**6-7 Million MT**

Annual Plastic waste:



**~500K-525K MT**

Municipal Solid Waste (MSW):



**2.1-2.4 Million  
MT/year**

Key Contributors:



**Industrial & Consumer  
Packaging**

Waste Origin:



**70% Residential/  
commercial MSW  
30% Industries**

Landfill Dependency:



**High** due to mixed waste  
and limited segregation

## HOW DOES RESIN CONSUMPTION SHAPE OMAN'S PLASTICS ECOSYSTEM?

### Top Resins

HDPE

PP

LDPE

PET

### Key Producers

OQ

Octal

### Highly Recyclable

HDPE

PP

PET

WHERE DOES OMAN'S PLASTIC WASTE FLOW – RECYCLING, DISPOSAL, OR LANDFILL?



**~14%** Plastic waste is segregated and recycled



**Recyclate Produced:**  
**~66 KT** (mainly flakes, granules)



**Exported:**  
**~52%** to India, UAE, Pakistan



**Local Use:**  
Limited due to low quality & technical gaps



**Waste Value Lost to Landfills:**  
**~\$90M** annually



**PET Flakes:**  
Imported due to poor domestic quality

WHAT STRUCTURAL BARRIERS LIMIT EFFECTIVE PLASTIC WASTE MANAGEMENT?



## WHICH POLICIES AND PARTNERSHIPS ARE REDEFINING OMAN'S PLASTIC FUTURE?

### Policy & Programs

- **Green Schools Program:**  
Circular economy education
- **Eco-Innovate Oman:**  
SME accelerator for sustainability
- **“Oman Tistahil” & “Secrets of the House”:**  
Public Awareness campaigns



### Infrastructure Projects

- **Reverse Vending Machines:**  
50 RVMs (planned) to reach 2,000 T/month PET collection
- **Waste-to-Energy Plant:**  
160 MW in Barka (Operational by 2027–28)  
» Diverting ~4,500 T/day of MSW



### E-waste Management

- MoU with PDO for WEEE handling and proper disposal
- Composting partnerships with Nakheel Oman Development Co.



## WHERE DO THE MOST IMPACTFUL GROWTH OPPORTUNITIES LIE?

Upskill recyclers with tech and quality standards

Mandate recycled content in products/packaging

Drive citizen awareness & incentives

Strengthen data & tracking for waste streams

Mandate source segregation at source

Formalize informal sector via policy frameworks

**Oman's plastic waste journey is at a turning point. Frost & Sullivan helps identify growth opportunities, streamline circular transitions, and drive sustainable ecosystem shifts.**