



ELLEN MACARTHUR FOUNDATION
Rethink the future

Resource constraints



- 3 bn new consumers are driving **resource demand**
- **Exhaustion** of easy-to-access reserves
- Need for **imports** from volatile regions stretches supply and increases volatility

The new consumer



- Emerging bias of **access over ownership**
- **Car-sharing** services are an example—membership is spiking

Investment & economy



- Long-term investment opportunities
- Resilience to external shocks
- Unemployment challenges

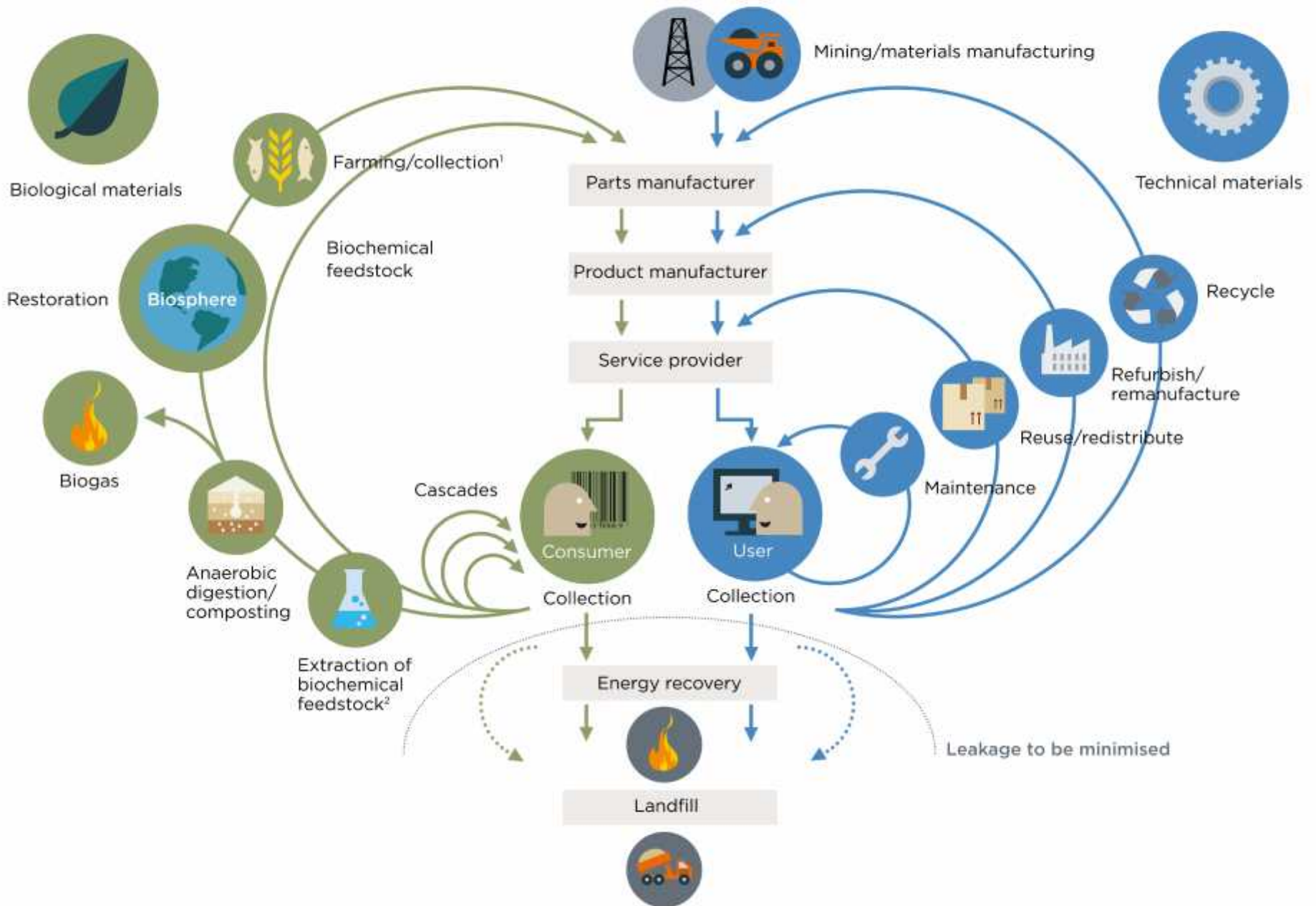
Enabling technology



- New technologies improve **product tracking** and separation
- Better **supply chain management** makes reverse logistics feasible

Source: *The Guardian*; Seattle Public Utilities (Seattle.gov); Frost & Sullivan, "Sustainable and Innovative Personal Transport Solutions—Strategic Analysis of Car sharing Market in Europe"

The circular economy—an industrial system that is restorative by design

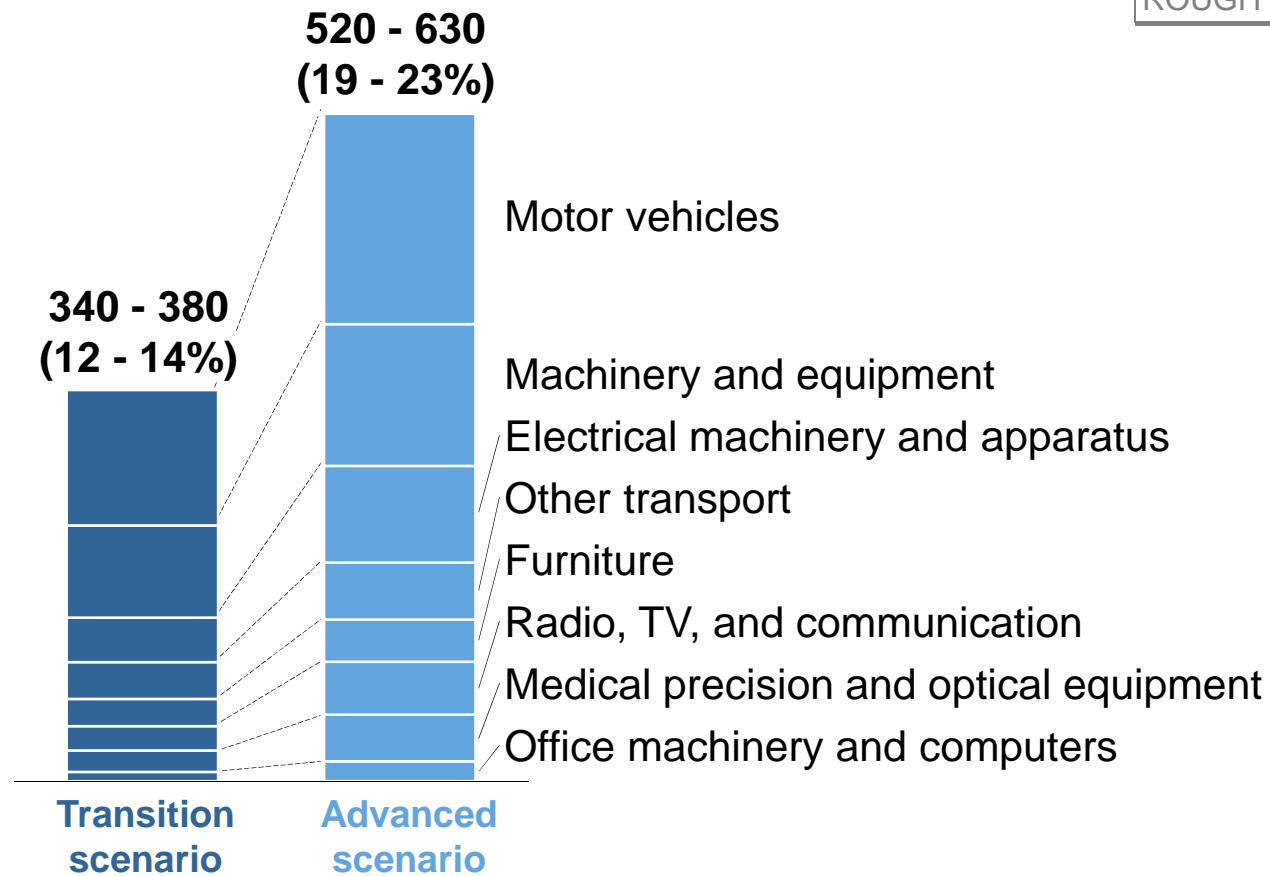


¹ Hunting and fishing.
² Can take both post-harvest and post-consumer waste as an input.
 SOURCE: Ellen MacArthur Foundation - Adapted from the Cradle to Cradle Design Process by Braungart & McDonough

At the EU level, up to USD 630 bn can be saved in the complex durables sector

Net material cost savings in complex durables with medium lifespans
USD billions per year, based on current total input costs per sector, EU

ROUGH ESTIMATES



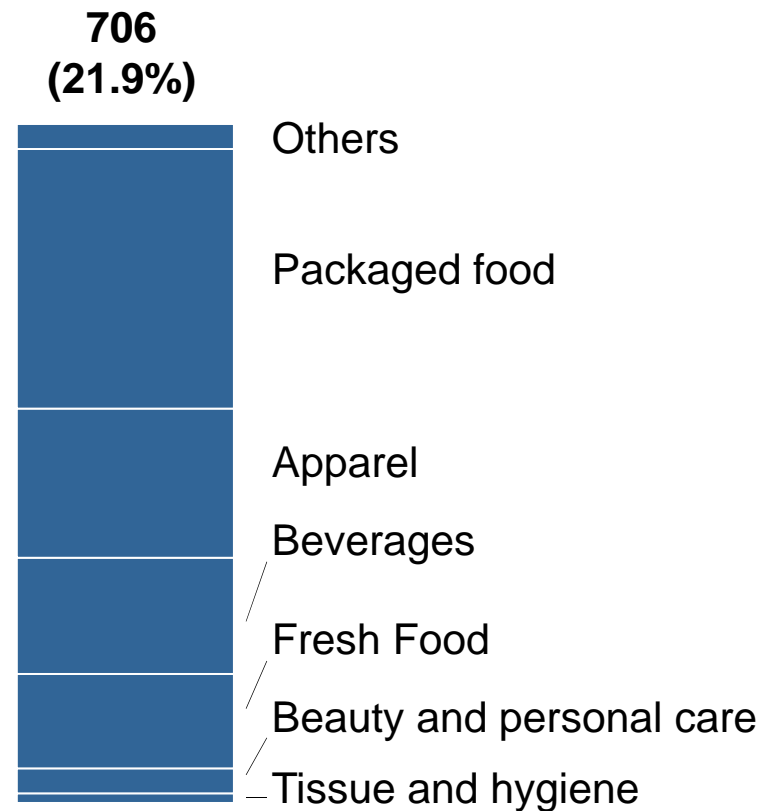
At the global level, up to USD 700 bn can be saved in the consumer sector



Net material cost savings in consumer industries

USD billions per year, based on current total material costs per sector, global

ROUGH ESTIMATES





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