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Plastic recycling to increase significantly by 2025

According to a new study of consultancy ecoprogram, up to 300 new sorting plants for plastic wastes will be commissioned in Europe by 2025. This happens against the backdrop of increasing recycling shares in the different countries.

Today, Europe has almost 1,200 active plastic sorting and recycling plants. However, this portfolio will not be large enough as recycling becomes increasingly important.

This is why sorting plants with a capacity of 5.2 million tons will be commissioned by 2025. This is a growth of 25% and the number of plants will increase by about 300.

The EU Waste Framework Directive will be the main market driver. By 2020, 50% of the plastics in MSW have to undergo material recovery. Almost no EU member state has yet reached this goal, which creates financial challenges for many countries.

“Within the waste management sector, recycling will thus be the most important growth markets in the next years” says project head Marcel Siebertz.

South Europe has the largest market potential: France, Spain and Italy are three populous states with a lot of catching up to do.

The waste management systems in Eastern Europe are currently being transformed and therefore also produce a strong development potential, even though financial incentives and unambiguous political framework conditions for recycling are lacking.

However, many European waste management systems that are considered as more advanced also do not yet reach MSW recycling quotas complying with the targets. This holds e.g. true for the Netherlands, Denmark, Austria, Sweden and Norway.

Contrary to the situation in South and Eastern Europe, however, the main reason for this is not the status of landfilling but the traditionally large market share of waste incineration. Switzerland, for instance, only reaches a material recovery share of plastic wastes of 10%, with 90% being incinerated. In late 2015, however, a revision of the Environmental Protection Act should also include a significant increase of recycling.

“Many countries increase their sorting capacities by expanding or building additional plants at already existing sites. An analysis of the active plants in Europe has been lacking so far,” continues Siebertz.

This is why ecoprogram has collected information on around 1,200 plastic sorting and recycling plants throughout Europe, analysed and compared them in a market study and forecast the future market development on the basis of a transparent methodology.

The operational plants and those that are currently being planned differ considerably by size and technological equipment. The more heterogeneous the waste stream to be sorted, the larger the processing plant.

The UK thus has the largest active plants, with an average capacity of 59,000 annual tons. The reason for this is that the separate collection is executed through a dry recyclables bin, which does not only include plastics, but also paper, metal and in some cases even glass.

The study “The European Market for Plastic Sorting and Recycling” can be ordered at:
www.ecoprogram.com

As a respected industry expert, Cologne-based consultancy ecoprogram accompanies clients from Germany and abroad in dealing with implementation-oriented management issues in the environmental and energy technology sectors. We focus on strategy consulting, market and competition analyses as well as multi-client studies.