PLASTICS RECYCLERS EUROPE

PLASTICS RECYCLING INDUSTRY FIGURES 2022

MAPPING OF INSTALLED CAPACITIES

PLASTIC RECYCLING INDUSTRY IN EUROPE, 2022

Plastic recycling installed capacities in EU27+3 countries reached 12.5 million tonnes in 2022 which translates into a 10% growth in comparison to the previous year.

The European plastic recycling industry invested an estimated 1 billion euros in 2022, despite the heavy market disruption registered in the recycling sector. However, this trend was not maintained in the amount of recyclates produced, which grew at a lower rate in comparison to the previous years due to lowering demand. Further investment will be needed to meet recycled content targets and keep advancing the circular economy.

Around 850 companies were active in recycling plastics in EU27+3 in 2022. Predominantly small in size, these plants average 15,000 tonnes each.

This report shows an overview of the installed input capacities of plastics streams in Europe in 2022.

850 COMPANIES
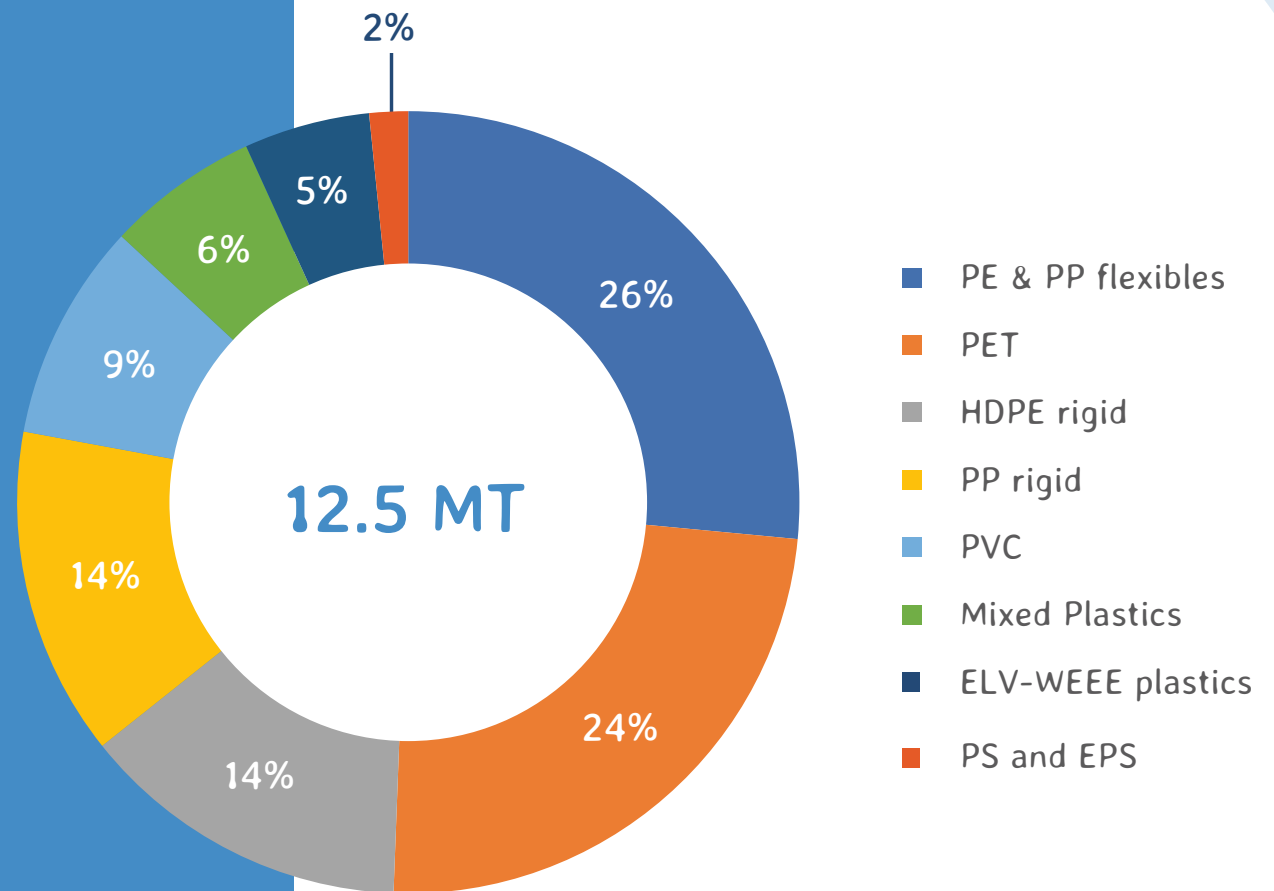
12.5 MILION TONNES INSTALLED CAPACITY

€10.4 BILLION TURNOVER

30.000 EMPLOYEES

SHARE OF TOTAL INSTALLED RECYCLING INPUT CAPACITY IN EU27+3*, PER POLYMER TYPE

Flexibles continue to lead in terms of the installed recycling capacities with more than 3.3 million tonnes reported in 2022. PE and PP flexibles, PET, and HDPE & PP rigids hold the largest proportion of the overall capacity in EU27+3 countries, representing nearly 80% of total input capacity.

New developments are foreseen for the recycling of ELV-WEEE plastics ahead of the announced proposal to introduce recycled content targets for these applications, whereas PS recycling is taking off. The introduction of mandatory recycled content targets will accelerate the use of recycled materials in new products and will allow a faster transition to a circular economy.
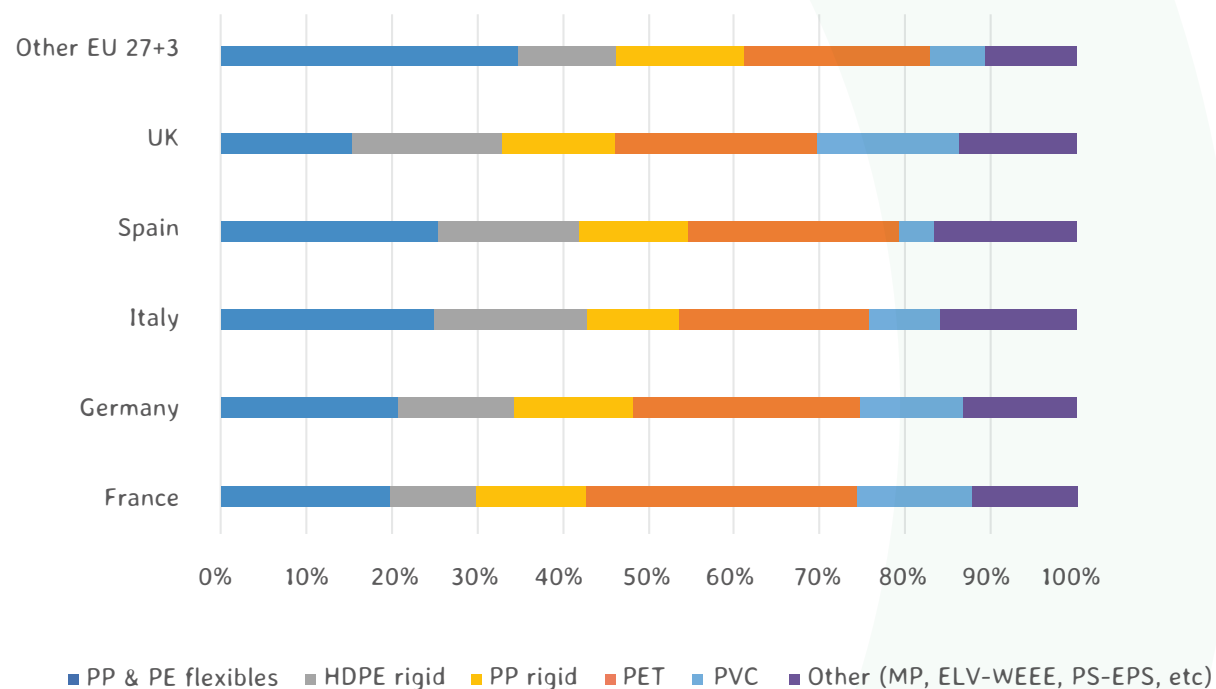
EU27+3: European Union Member States, Norway, Switzerland, and United Kingdom

12.5 MT

- 2%
- 5%
- 6%
- 9%
- 14%
- 14%
- 24%
- 26%

Legend:
- PE & PP flexibles
- PET
- HDPE rigid
- PP rigid
- PVC
- Mixed Plastics
- ELV-WEEE plastics
- PS and EPS

TOTAL INSTALLED RECYCLING INPUT CAPACITY IN EU27+3, PER POLYMER & PER COUNTRY (%)

Germany, Spain, Italy, the United Kingdom, and France remained the countries with the highest installed capacity in EU27+3, accounting for 60% of the total of 12.5 million tonnes. They are followed by the Netherlands, Poland and Belgium.

PE and PP flexibles hold the largest share of installed recycling capacity compared to other polymers in Spain, Italy, Poland and Belgium. Additionally, the Netherlands, United Kingdom, Germany, Spain and Italy lead in HDPE and PP rigids recycling capacities. Concerning PET, France devotes one-third of its plastics recycling facilities to this polymer, while Germany and Spain dedicate more than one-fourth of their infrastructure to its reprocessing.
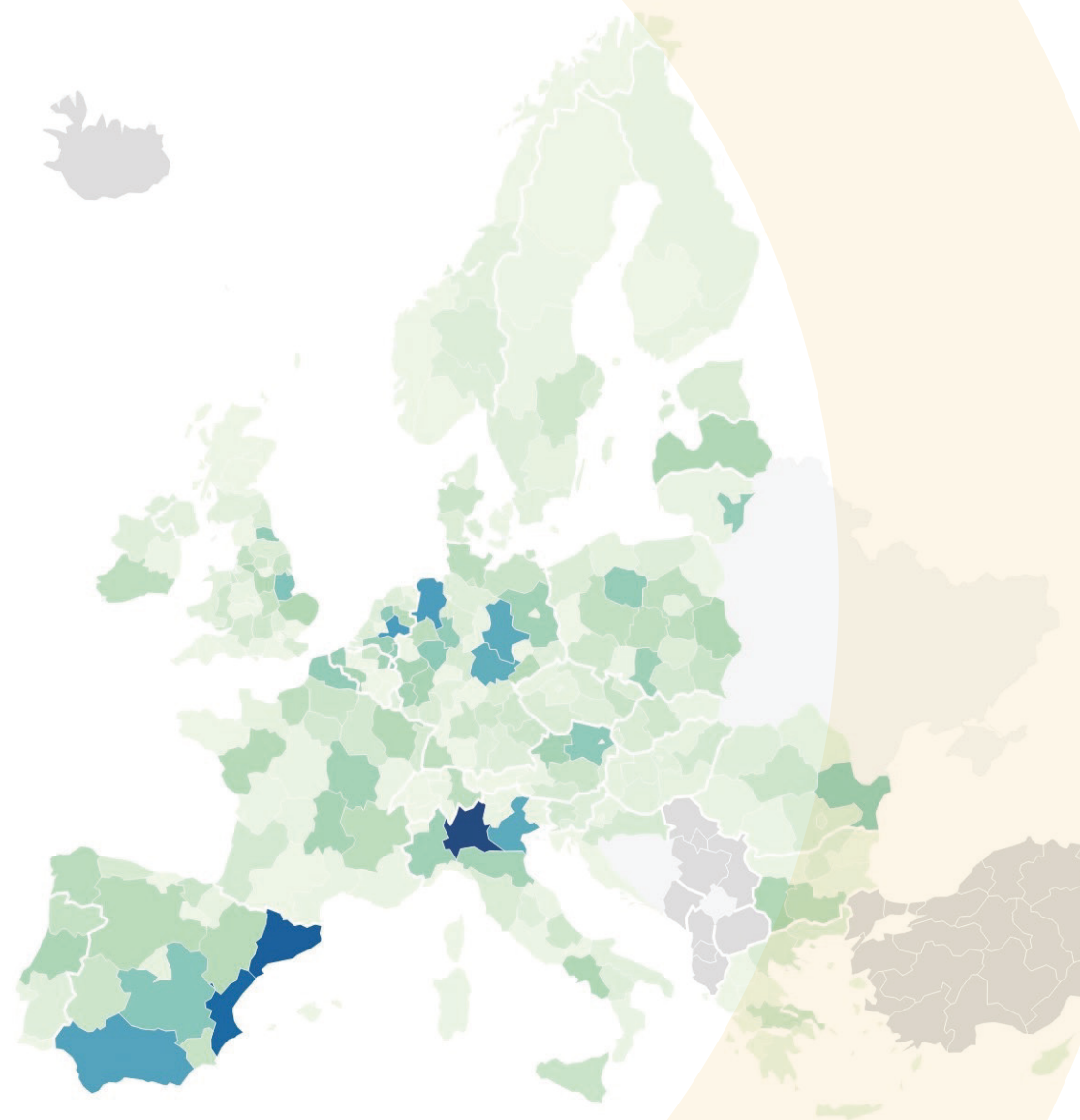
Regarding the stream of ELV-WEEE, which includes the treatment of, among others, PP, PS and ABS, France and United Kingdom hold the highest installed capacities, whereas Spain does so in the group of PS-EPS.

Legend: PP & PE flexibles, HDPE rigid, PP rigid, PET, PVC, Other (MP, ELV-WEEE, PS-EPS, etc)

TOTAL INSTALLED RECYCLING INPUT CAPACITY IN EU27+3, PER REGION*

Belgium, Netherlands, Poland and Romania experienced major growth during 2022, when compared to the average growth of the rest of EU27+3 countries.

The regions with the highest installed plastics recycling capacities are located in Germany, Italy, the Netherlands, Spain and the United Kingdom.
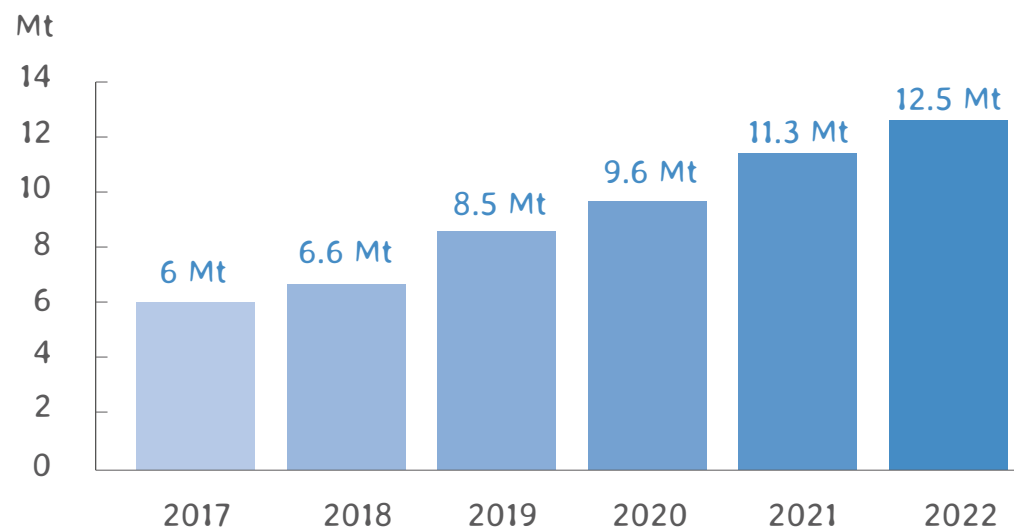
*Regions at NUTS 2 level. The NUTS classification (Nomenclature of territorial units for statistics) is a hierarchical system for dividing up the economic territory of the EU and the UK in levels. The second level (NUTS 2) corresponds to the category of basic regions for 2021.

EVOLUTION OF INSTALLED PLASTICS RECYCLING INPUT CAPACITY IN EU27+3

The installed capacity for plastics recycling almost doubled from 2018 to 2022 and averaged a yearly growth rate of 16%.

To reach 2025 targets of 10 million tonnes of recyclates, it will be required to achieve 16 million tonnes of installed recycling capacity by 2025.

Plastics recycling activities in 2022 resulted in the reduction of more than 10 million tonnes of CO_2 emissions, equivalent to removing from circulation all Belgian passenger cars for an entire year.

Mt

Year	Capacity
2017	6 Mt
2018	6.6 Mt
2019	8.5 Mt
2020	9.6 Mt
2021	11.3 Mt
2022	12.5 Mt