

PRESS RELEASE

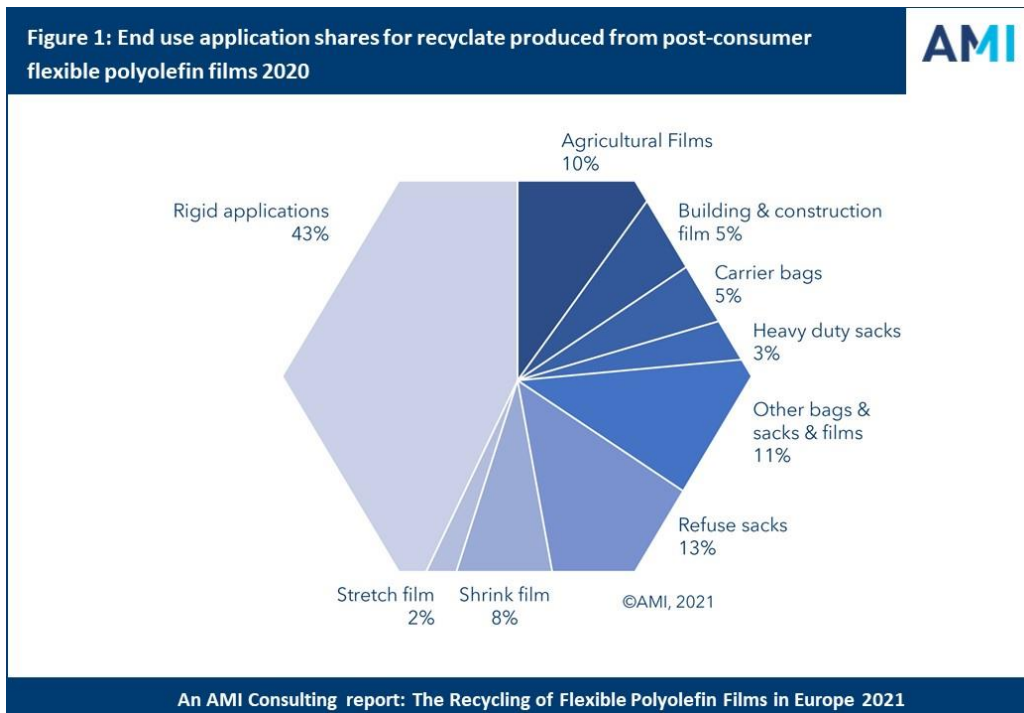
European recycling industry prepares for larger volumes of post-use flexible polyolefin films becoming available

A new report from AMI Consulting published in June 2021 presents a comprehensive analysis of the state of play and future outlook for the recycling of flexible polyolefin films in Europe. It analyses the industry’s operating environment, and the particular challenges involved in the collection, sorting and recycling of flexible films.

In preparing the report, AMI’s comprehensive and detailed in-house data on virgin polymer demand, polymer end use applications, and recycling capacities was combined with an extensive research programme including conversations with a wide range of industry participants.

The quantitative analysis includes a focus on volumes of post-use flexible polyolefin films generated as waste by end use sector and, considering collection rates, levels of contamination and international trade in post-use plastics, an assessment of the volumes of post-use films available to EU+3 recyclers as inputs into the recycling extrusion process. The latter data point is of particular importance given it marks the new calculation point for the EU’s recycling targets. Data is provided for the years 2019, 2020 and 2021, with forecasts for 2025 and 2030.

The report also identifies the top six countries in terms of recycling capacity for flexible polyolefin films in Europe, with Germany in the lead, as well as the region’s top ten film recyclers. This is complemented by a detailed analysis of existing and emerging end use applications for the outputs of the recycling process, providing data for 2020, 2025, and 2030.



The quantitative analysis is accompanied by a detailed assessment of the industry’s changing operating environment and the implications of these changes have for the industry’s future development.

In a market where demand for recyclates has traditionally been determined by fluctuations in virgin polymer prices, market forces alone are not sufficient to create a viable operating environment for recyclers. Legislation has become increasingly important as the key instrument to incentivise recyclate use beyond the sectors where consumer pressure and brand owner commitments have initiated change. Measures of key relevance can be found in the EU Strategy for Plastics in the Circular Economy.



AMI’s report explores the current collection and sorting processes for different types of flexible polyolefin films and how they impact upon volumes and quality of post-use films available for recycling. It also looks at definitions of ‘recyclability’ and the solutions market participants across the value chain are working on to achieve it. Technological innovations and the role chemical recycling can play to increase recycling rates for flexible films form further parts of the analysis.

With deadlines for meeting EU recycling targets approaching the recycling industry needs a clear commitment to investments into Europe’s collection & recycling infrastructure for flexible films. There is significant potential to increase the volume of post-use films made available for recycling, and to produce higher quality recyclates suitable for a broader range of end use applications.

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