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Research Report

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IW-Kurzbericht 28/2018

2025 recycling target: only 10 EU countries on track

Adriana Neligan

Two years after adopting the Circular Economy Package, EU institutions finally agreed on new EU waste rules. Despite lower recycling targets as originally envisaged, most countries still have to push recycling to meet the goals. A single method of determining recycling rates was also decided, but an exemption will continue to allow for disparate recycling rates.

The EU Waste Package: a compromise

The EU Circular Economy Package pushes forward the concepts of 'recycle, repair and reuse' as well as waste avoidance (see Neligan, 2018). Yet, finding common positions on how to revise waste legislation was difficult. In mid-April the EU Parliament will vote on the new waste rules before final adoption by the Council (EU Parliament, 2018). The EU Commission proposed a recycling target of 65 per cent of municipal waste by 2030 – the EU Parliament called for 70 per cent and the EU Council for 60 per cent. As a compromise, recycling targets for municipal waste are now set at 55 per cent by 2025, 60 per cent by 2030 and 65 per cent by 2035. The agreement only goes part of the way towards harmonising the measurement of real recycling. With four methods currently available, agreeing on a single method, which records the input into the final recycling process, is an important

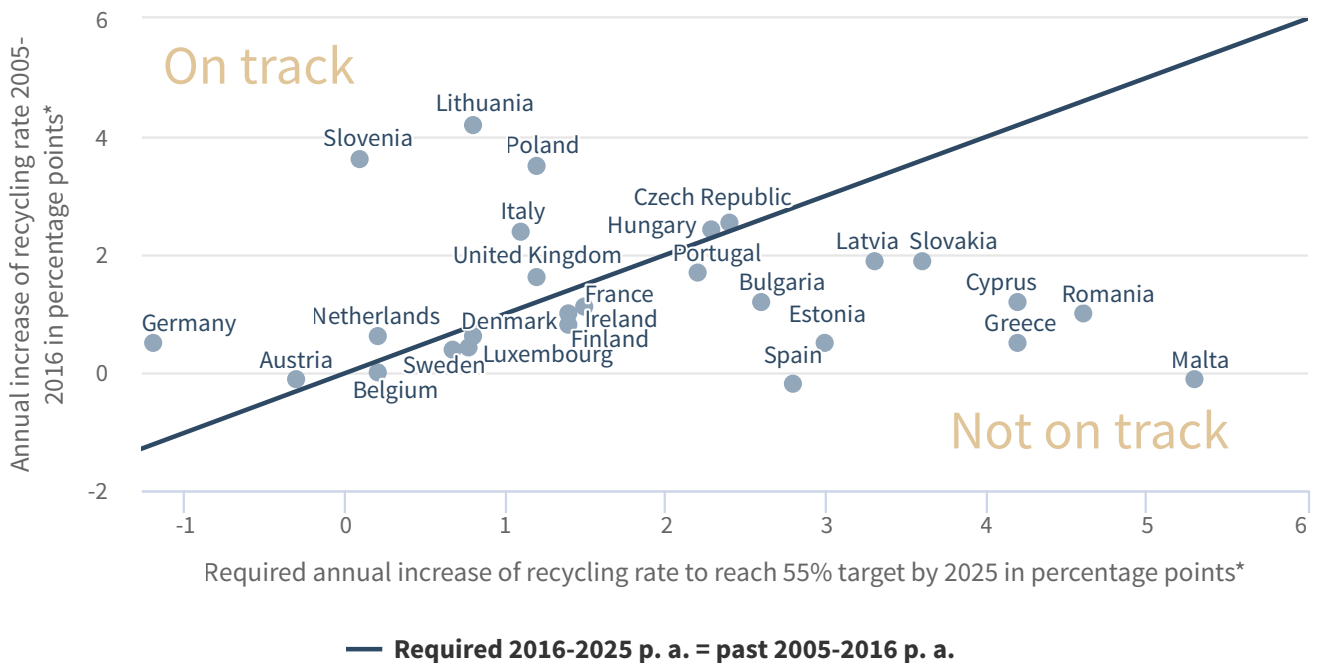
decision. Since many countries use the weight of material from collection (or the first sort) as measurement point, this will imply adjustments of their recycling rates. However, an exemption allows member states, if data is unavailable, to declare materials as recycled even after an early waste sorting stage by applying average loss rates (EU Commission, 2018). Hence, comparability of recycling rates between EU member states will continue to be an issue.

No clear shift to waste avoidance

Since 2005, 17 EU countries have been able to reduce municipal waste per head, while it has increased in Germany. On average, Germany generated 626 kg of municipal waste per person in 2016. Within the European Union (482 kg per head) only Denmark (777 kg), Cyprus (688 kg) and Malta (623 kg) threw away more (Eurostat, 2018). Between 2005 and 2016, the total amount of EU municipal waste decreased by 4 per cent – in Germany it rose by 11 per cent. Yet, both the EU and Germany have been able to reduce the waste intensity – the total volume of municipal waste per Euro gross domestic product over the past decade. Nonetheless, countries with high GDP per capita, e.g. Germany but also Denmark and Ireland, still tend to produce more municipal waste per head than countries with low level per-capita GDP.

Recycling target for 2025 in many cases far away

Comparison of recycling rates, on track = can grow at a slower rate annually than in the past, not on track = has to grow faster annually than in the past



EU-27 (without Croatia); *if data for 2016 is not available, the most recent available year is used: Ireland, Portugal: 2014, Slovenia: 2015. Sources: Eurostat; German Economic Institute

Slow switch from landfilling to recycling

The envisaged recycling targets are ambitious, but are a key impulse to move all EU member states towards more recycling. Since only a few member states are on track to meet the goals yet, strict targets are a way to enforce the needed change in the waste management infrastructure in many countries. Landfilling dropped clearly in the EU-27 states, from 43 (2005) to 24 per cent (2016). However, ten member states still send more than half of their municipal waste to landfills. Only seven member states already fulfil the planned 10 per cent landfilling target until 2035 as they dump at most one tenth of their municipal waste on rubbish tips. In parallel, incineration – mostly for energy recovery – rose from 19 to 28 per cent.

Recycling has become more important in Europe: EU recycling rates increased from 32 to 46 per cent between 2005 and 2016. Yet, more progress is needed to reach the targets.

Recycling targets: countries on track

The figure plots the member states' average annual increases in recycling between 2005 and 2016 and the annual increases required by 2025 to reach the goal. Only ten countries including Germany are on track to achieve the first goal of 55 per cent by 2025, assuming they keep up their recycling efforts of the past decade. All other countries will have to increase their recycling rate at a faster pace than in the past decade. Since EU waste data is not harmonised yet, some of the data on recycling might include rejects from sorting and processing.

A few with a recycling tradition on track

Germany is leading the EU recycling hierarchy with 66 per cent of its municipal waste being recycled, much more than on EU average (46 per cent). It is the only country that has already achieved the 2035 target of 65 per cent according to the current method. Other countries with traditionally high recycling rates are Austria, Belgium and the Netherlands with rates lying above

50 per cent. Luxembourg, Sweden and Denmark have rates greater than 45 per cent. Except for Germany, Austria and the Netherlands, all other countries with traditionally high recycling rates have to raise their rate faster until 2025 than the minor increases observed during the past decade to reach 55 per cent.

More with recent recycling efforts on track

Several countries had large rises in their recycling rates in the past decade. Slovenia stands out as a newcomer (2015: 54 per cent). Lithuania is also catching up due to a recent major rise of the rate (48 per cent). But there are also upcoming recycling countries like Italy, Poland and the United Kingdom which are just below the EU average. Hungary and the Czech Republic still have lower recycling rates (35 per cent) but started from a very low level in 2005. Slovenia, Lithuania, Italy, Poland and the United Kingdom but also Hungary and the Czech Republic should be on track to reach all targets until 2035, provided they keep up the fast pace of the past decade.

No low-level recycling country on track

An EU-wide move towards more recycling is only realistic if low-level recycling countries install new waste management infrastructure to comply with strict targets. This is especially critical for Malta, Romania, Greece and Cyprus with recycling rates below 20 per cent, but also to Estonia and Spain with rates just below 30 per cent. Despite already having moderate recycling rates between 30 and 40 per cent Bulgaria, Ireland, France and Finland are moving only slowly towards the EU average. None of these low-level recycling countries are on track yet to achieve the EU targets from 2025.

Implicit sharpening of the targets

Moving the point of measurement for recycled materials to what is effectively recycled is key to develop better-functioning markets for secondary raw materials. Some countries, including Germany, currently use the tonnage of waste collected as the measurement point. Instead of the reported 66 per cent Germany's recycling rate would drop to between 47 per cent and 52 per cent

with the new method (Obermeier/Lehmann, 2017). The German rate would have to increase between 0.7 to 0.9 percentage points annually until 2035 to reach 65 per cent according to own calculations. Looking back, Germany only managed 0.5 percentage points annually over the past decade based on the current method. Nonetheless, Germany remains top of the list of the world's Top-10 leading recycling nations in a ranking even with an adjusted recycling rate of 56 per cent. The ranking also shows that the adjusted recycling rates for the Netherlands and Slovenia are much lower (46 per cent) than currently reported. In the case of Belgium, Italy and Austria the adjustment leads to lower recycling rates, but the reductions from the reported rate are not as substantial (Eunomia/EEB, 2017). Yet, it still remains to be seen how the exemption for using average loss rates will be implemented to determine future recycling rates. For Germany to keep EU recycling leadership in future, further increases in efficiency and in recycling quality are required and existing successful recycling processes and related infrastructure should be preserved.

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