



ERPA

Driving European Paper Recovery & Recycling

EuRIC – Realising the circular economy

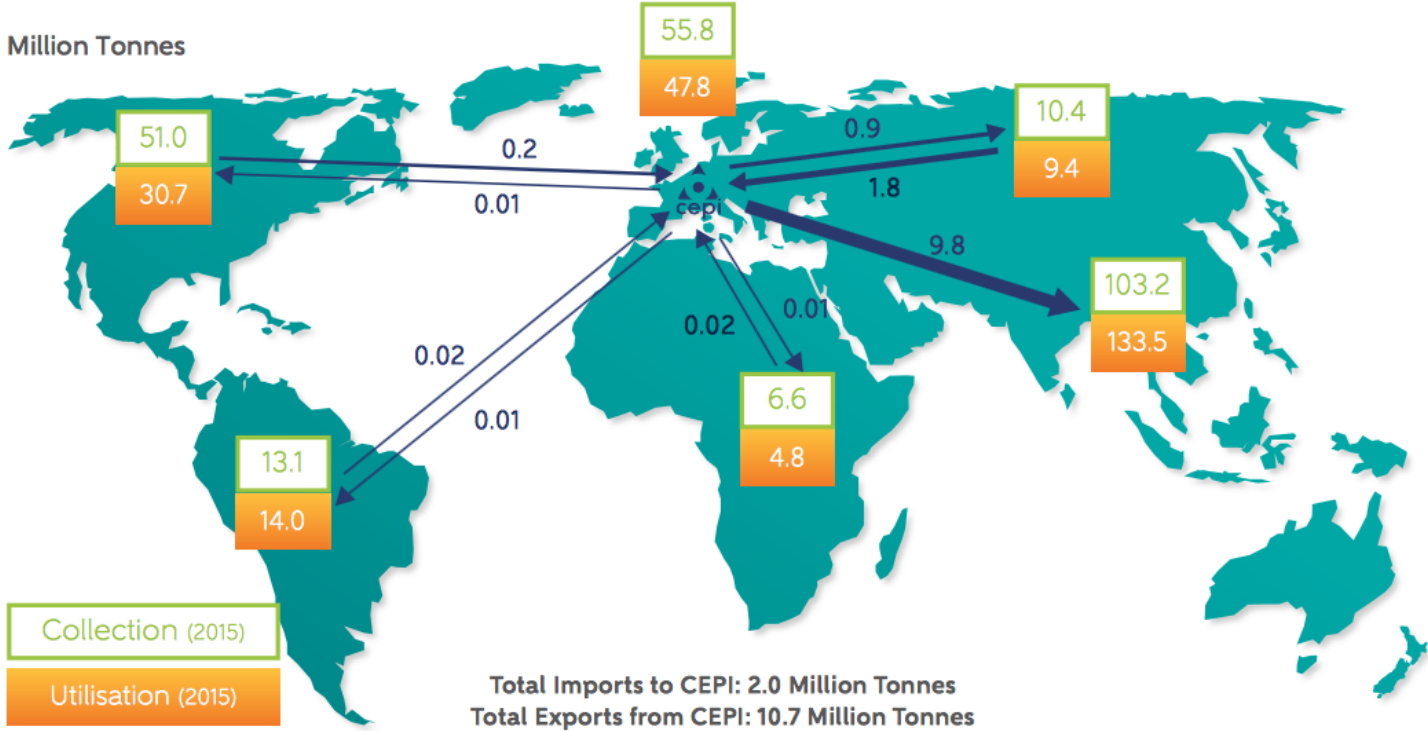
Unlocking obstacles affecting recycling in Europe to drive the circular economy and the climate agenda.



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World wide recovered paper market

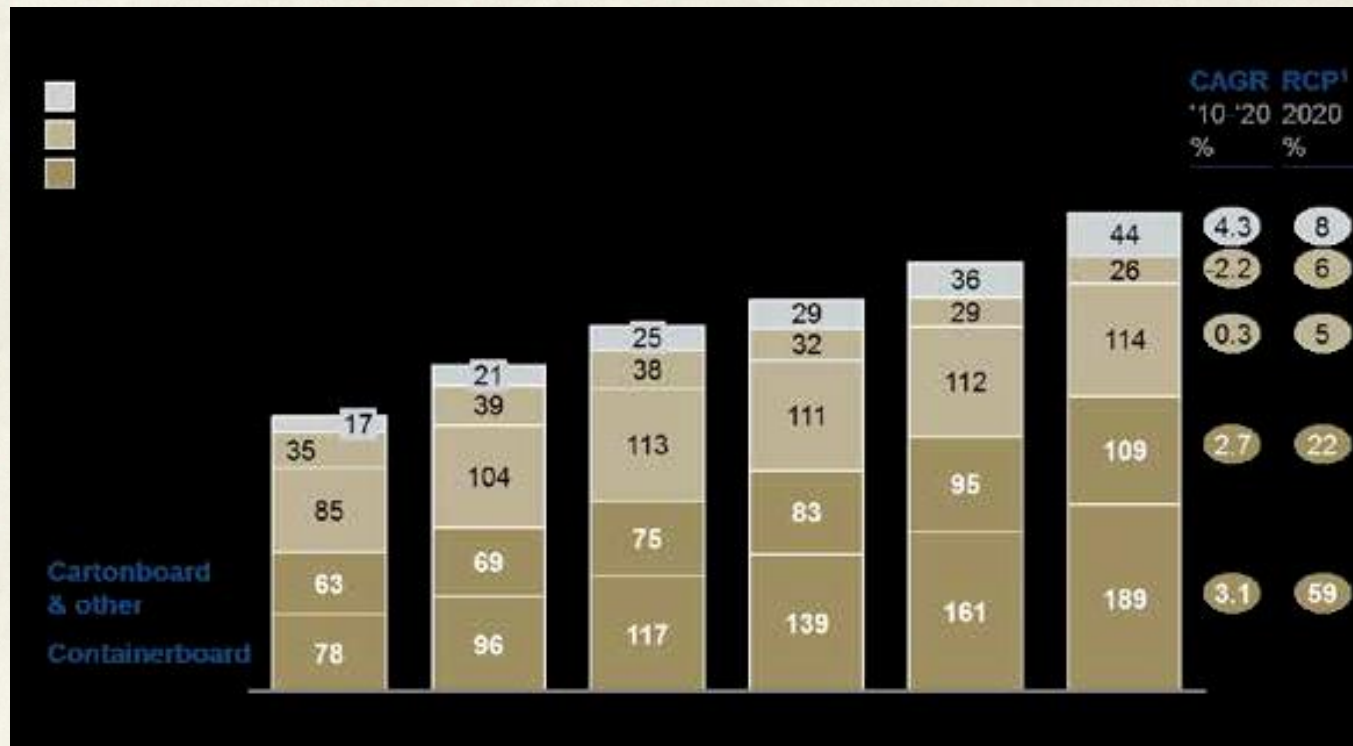
CEPI Trade Flows of Paper for Recycling in 2016



¹Other Europe: total Europe excluding CEPI countries

World wide recovered paper market

increased demand of 150 million MT in 15 years



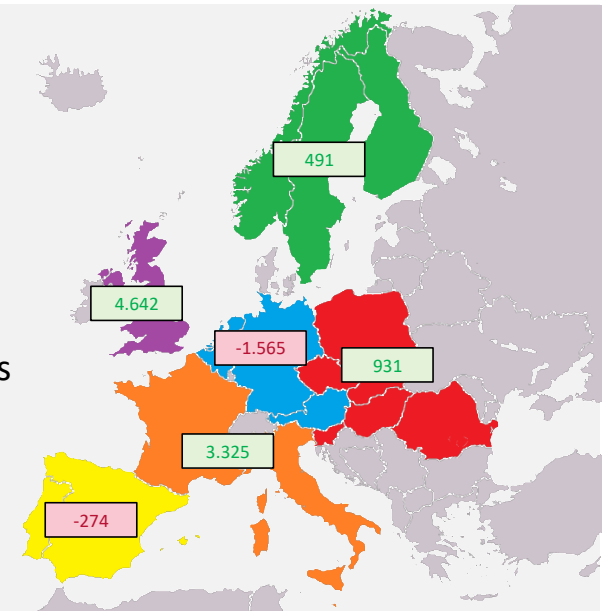
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European recovered paper market.

PAPER FOR RECYCLING: SUPPLY AND DEMAND IN EUROPE UNEVENLY SPREAD SURPLUS / NEW (CONTAINERBOARD) CAPACITIES

- ▶ Europe's recovered paper surplus is spread unevenly
- ▶ Example:
 - Germany: Deficit of 1,5 million
 - UK: Surplus of 4,6 million
- ▶ Mind: Majority of new (expected) containerboard capacities is coming online in (blue) deficit region!



Source: CEPI annual statistics 2015; All figures are in metric kT

Strong demand in the EU for recovered paper

Necessary policy changes in the EU to boost circularity in paper

- ❑ **Properly functioning internal market with harmonized laws and harmonized law enforcement**
- ❑ **European paper packaging Industry is growing and needs the secondary raw materials for their new capacities in Central Europe and Germany in order to close the loop.**
- ❑ **Recovered paper is a commodity and not a waste therefore “End of Waste” should apply for various grades of this secondary raw material.**



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Example of obstacles

1 Different status of the recovered paper inside the EU.

2 Different enforcement of the WSR inside the EU.

Harmonization of the status for recovered paper.....

Transport of EN 643 3.16

What should be filled in on the Annex VII ?

What type of truck ?

Status of recovered paper ?

The Netherlands : waste

NRW : End of waste

Hessen : waste

Bavaria : End of waste

Transport inside Europe is complex and expensive.

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Overseas transport outside the EU

Overseas transport :

- * Inspections of the material before shipping
- * No discussion about the Annex VII
- Overseas transport in 40-45 FT boxes
- * No road taxes or traffic jams



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European Recycling Industries' Confederation • Europäischer Bund der Recyclingin

Conclusion

- ❑ **Unclear situation on the end of waste status of recovered paper and board could lead to a disrupted market.**
- ❑ **Acceptance of the new reality inside the EU and adoption of the new requirements for recovered paper and board**
- ❑ **Harmonizing the end of waste status for recovered paper will benefit to a well functioning internal market and will close the loop for paper and board in Europe.**

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Together we will achieve an obstacle free road for recovered paper for recycling !



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