

Recycling activity in Europe

Bucharest conference

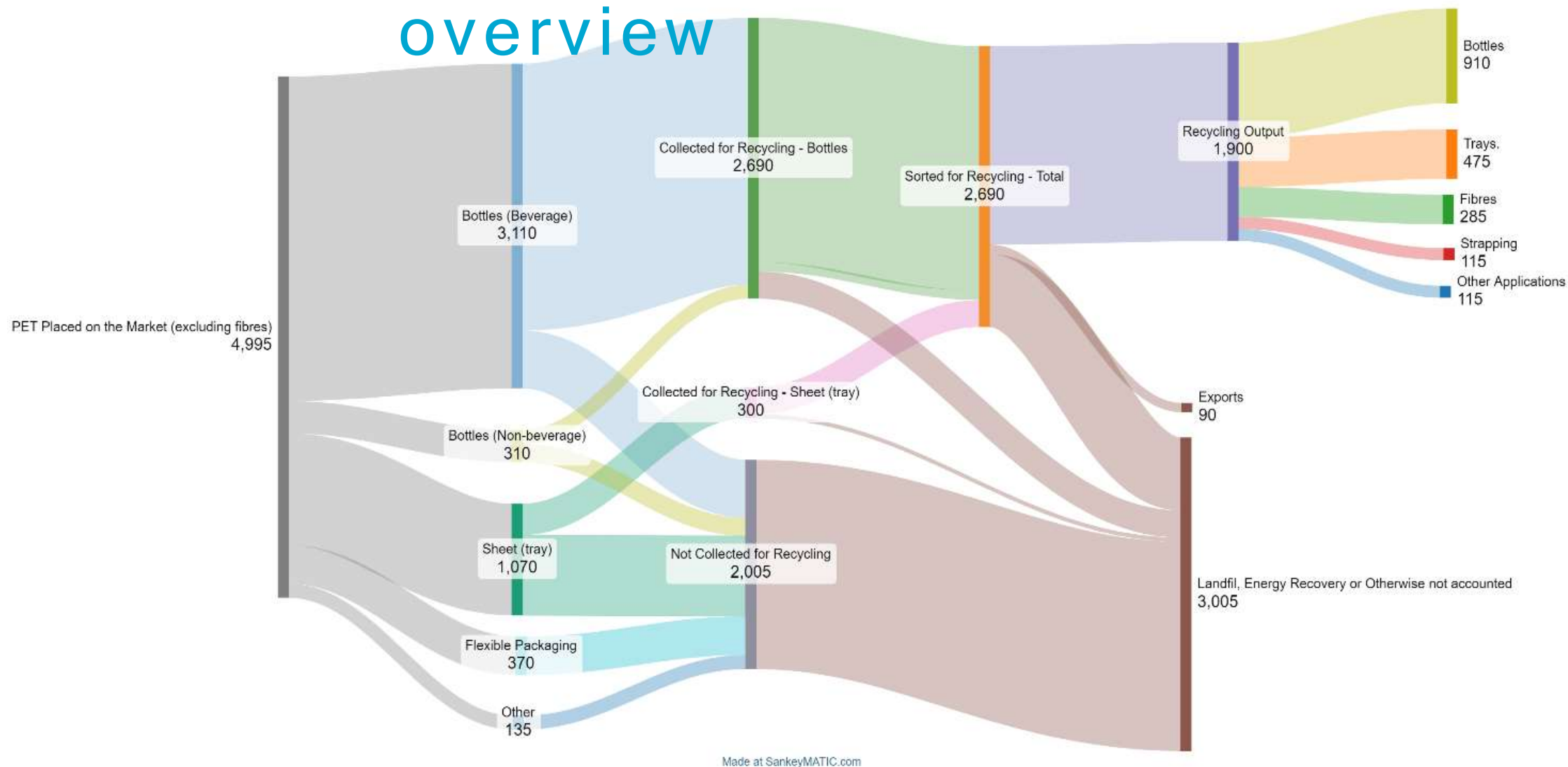


www.petcore-europe.org





PET value chain overview



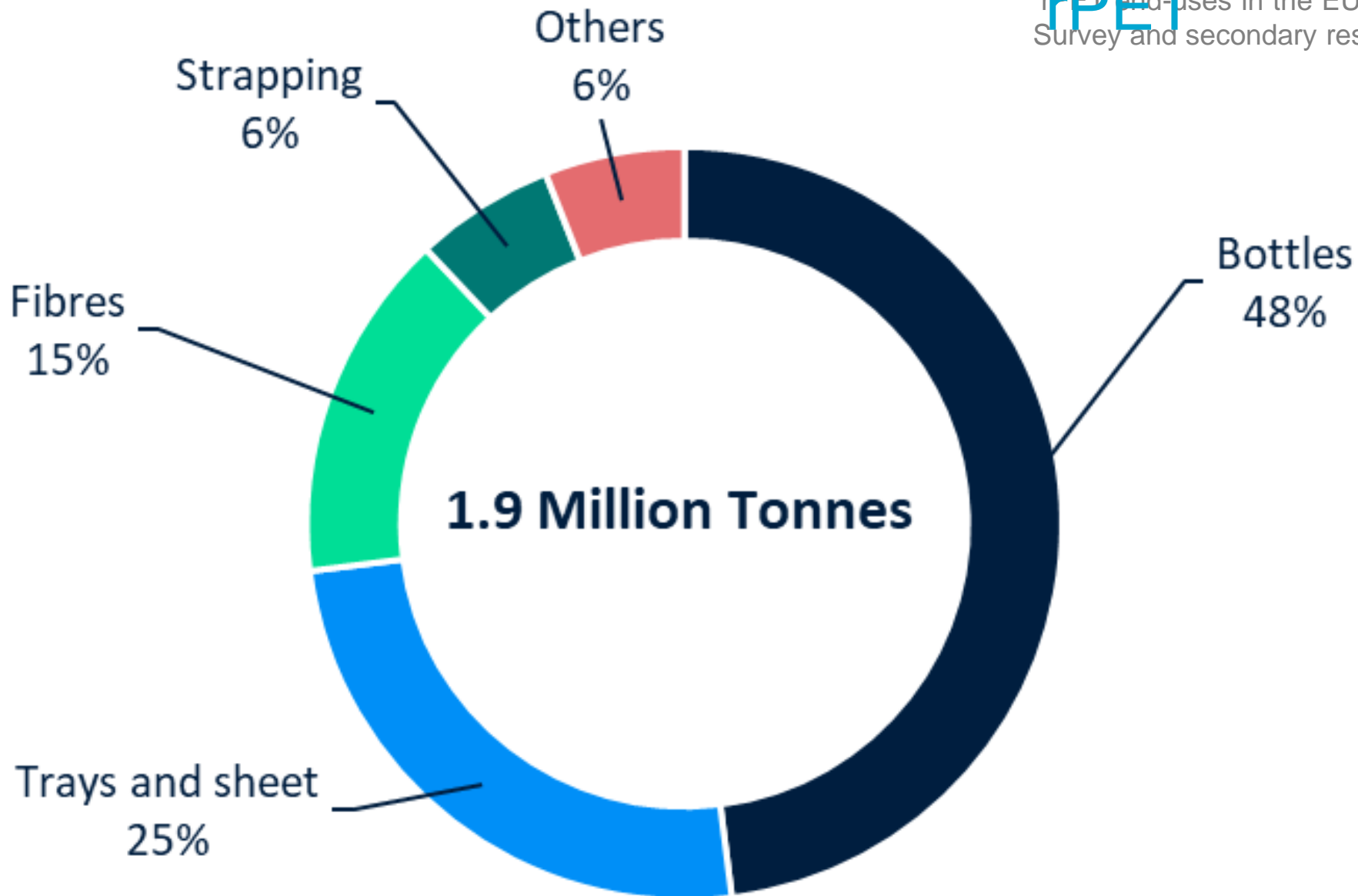
: PET and rPET material flow in '000 tonnes (excluding polyester fibres) in 2022.

Source: ICIS Supply Demand Database, ICIS analysis, PRE survey data, Eurostat

Note: At the time of the writing of this report no accurate data for non-beverage bottle collection for recycling was found for 2022. The above material flow is for illustrative purposes only.

The POM bottle volumes also include other non-PET components such as caps and labels that are estimated to account for approximately 10% of the total collected weight.

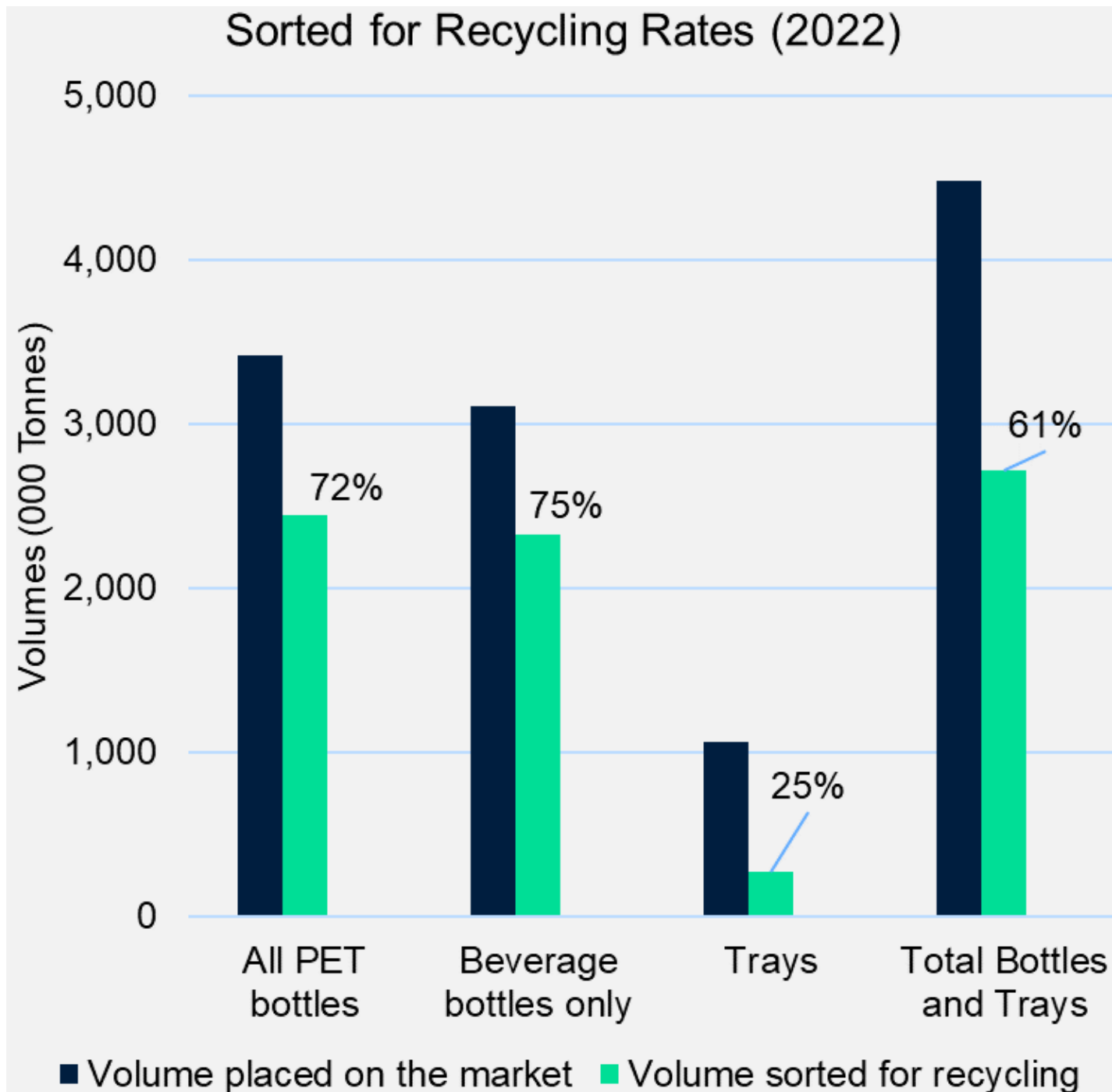
rPET End-uses, 2022



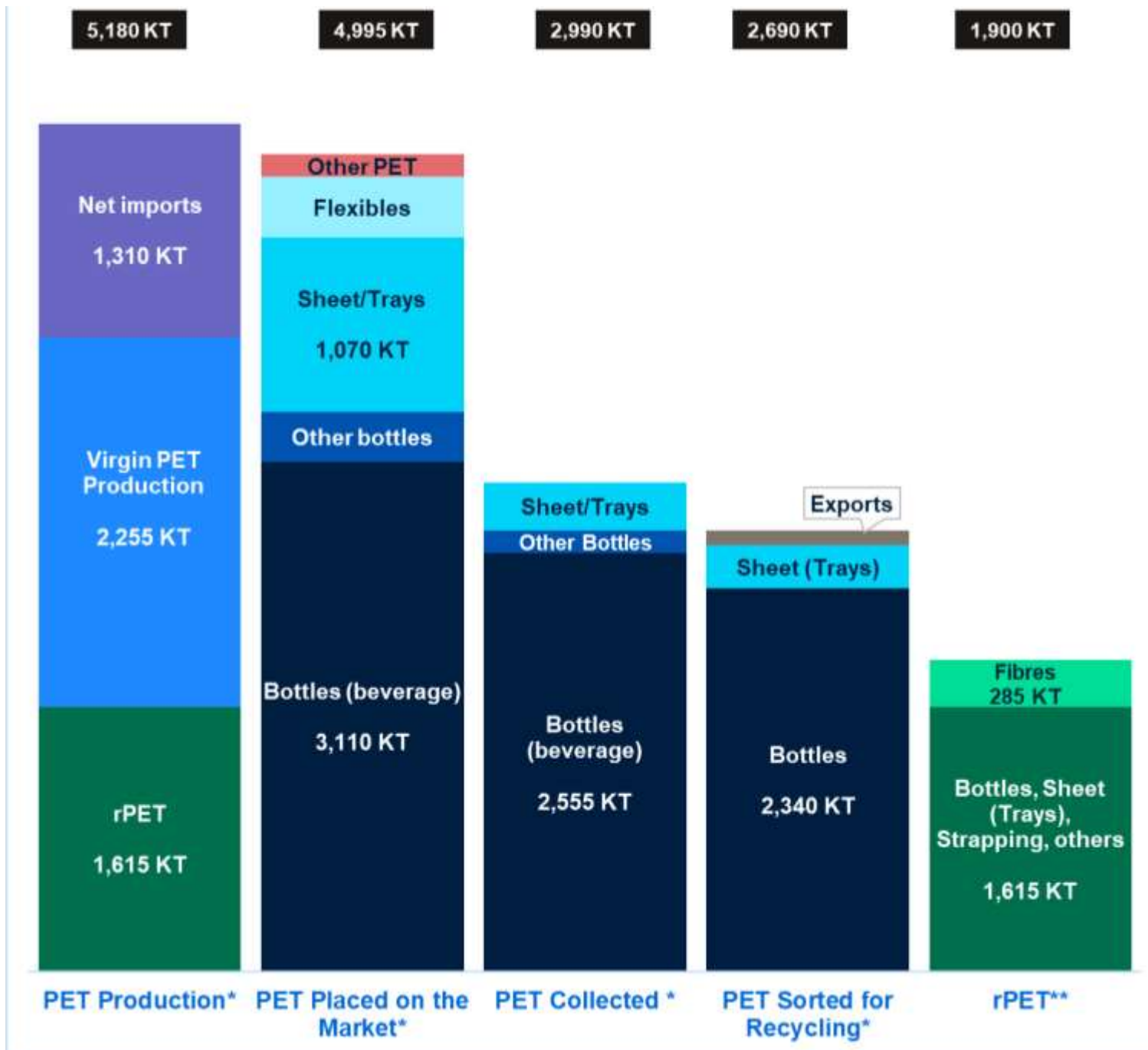
Key end-markets for

rPET end-uses in the EU27+3 region in 2022. Source: PRE Survey and secondary research





Sorted for recycling rates for bottles and trays in the EU27+3 region in 2022
Source: ICIS research and analysis



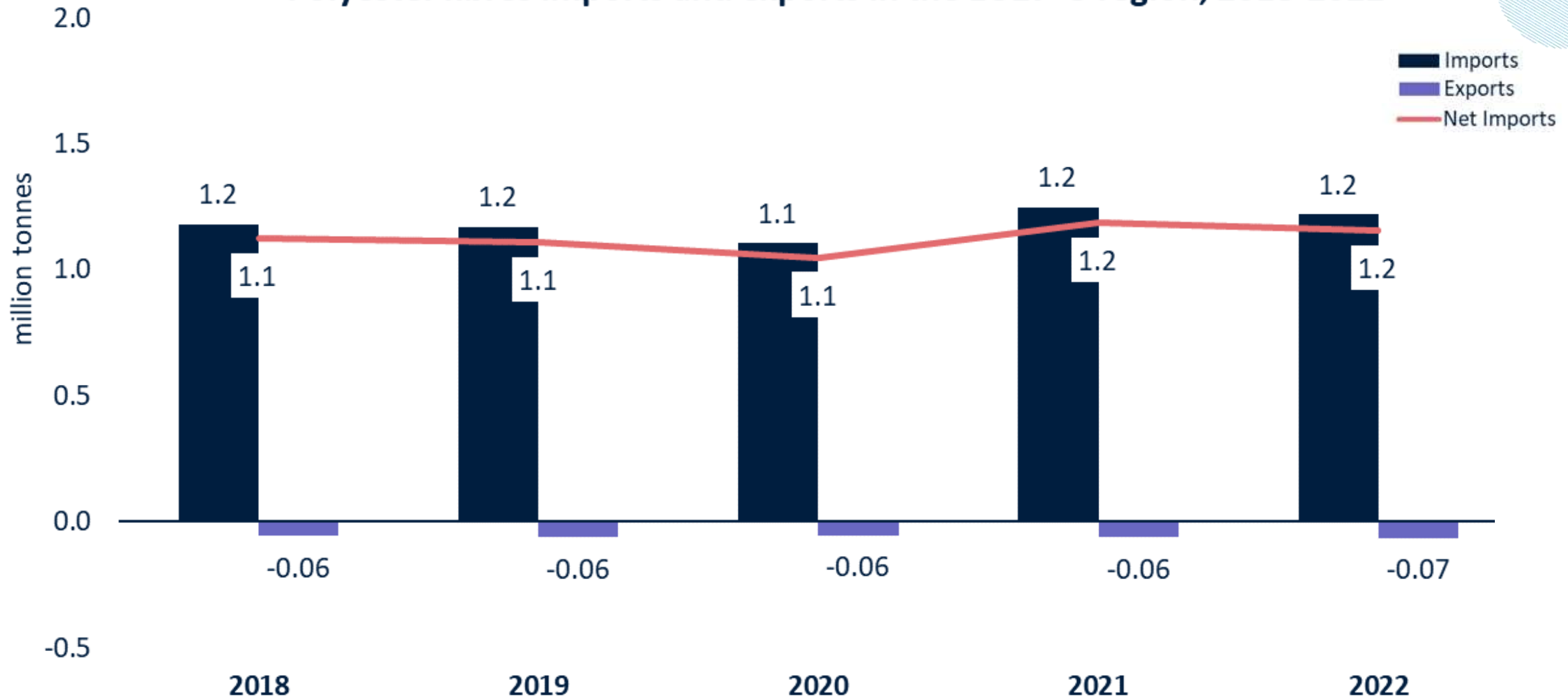
European PET Material Flow, 2022

Source: PRE Surveys, ICIS S&DD and Analysis

*Fibres not included

**Includes consumption of rPET output by fibres (flakes)

Polyester fibres imports and exports in the EU27+3 region, 2018-2022



Polyester fibre imports and exports including polyester filament yarns, polyester synthetic staple fibers and polyester synthetic filament tow, 2018-2022

Source: ICIS Supply and Demand Database.

Numbers have been rounded up.

PET Recycling (Washing) Capacity by Country-2022



PET recycling washing capacity by country, 2022



Region definitions:

Central Europe: Austria, Czechia, Hungary, Slovakia, Slovenia and Switzerland

Southeastern Europe: Bulgaria, Croatia, Greece and Romania

Benelux: Belgium, Luxembourg and Netherlands

Baltics and Scandinavia: Latvia, Lithuania, Finland, Norway and Sweden

PET Recycling (Extrusion) Capacity by Country-2022



Region definitions:

Central Europe: Austria, Czechia, Hungary, Slovakia and Switzerland

Southeastern Europe: Bulgaria and Romania

Benelux: Belgium, Luxembourg and Netherlands

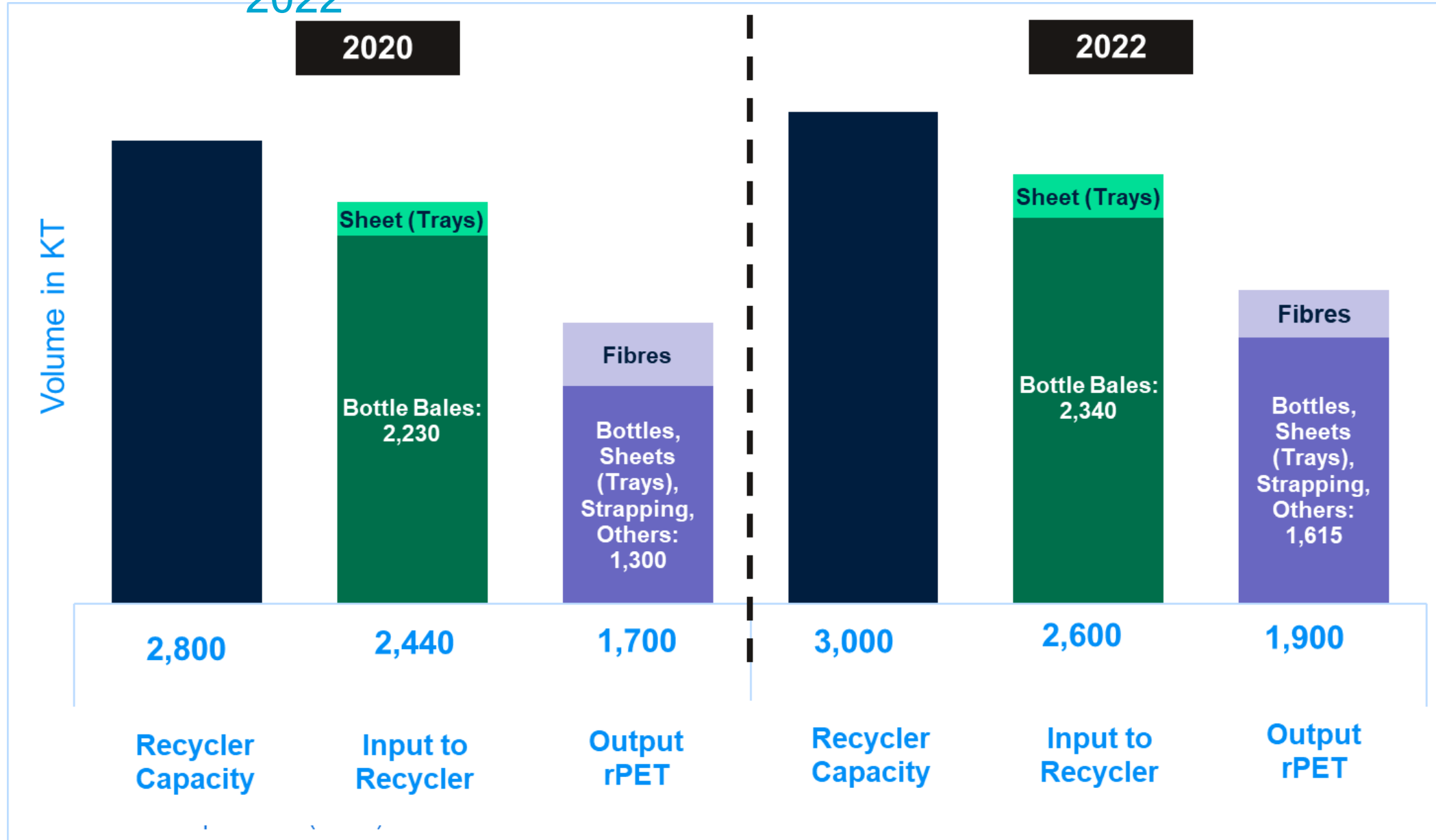
Baltics and Scandinavia: Latvia, Finland, Norway and Sweden



PET extrusion capacity by country, 2022

Source: PRE Surveys and secondary research.

Europe PET recycling capacity, input and output, in 2020 and 2022



Europe PET recycling capacity, input and output, in 2020 and 2022.

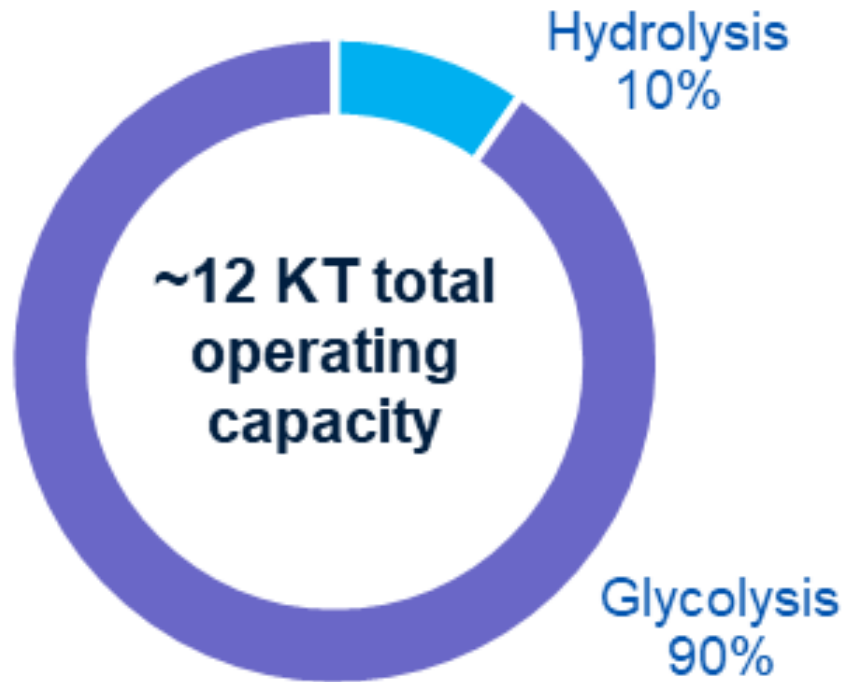
Source: PRE and Survey secondary research.



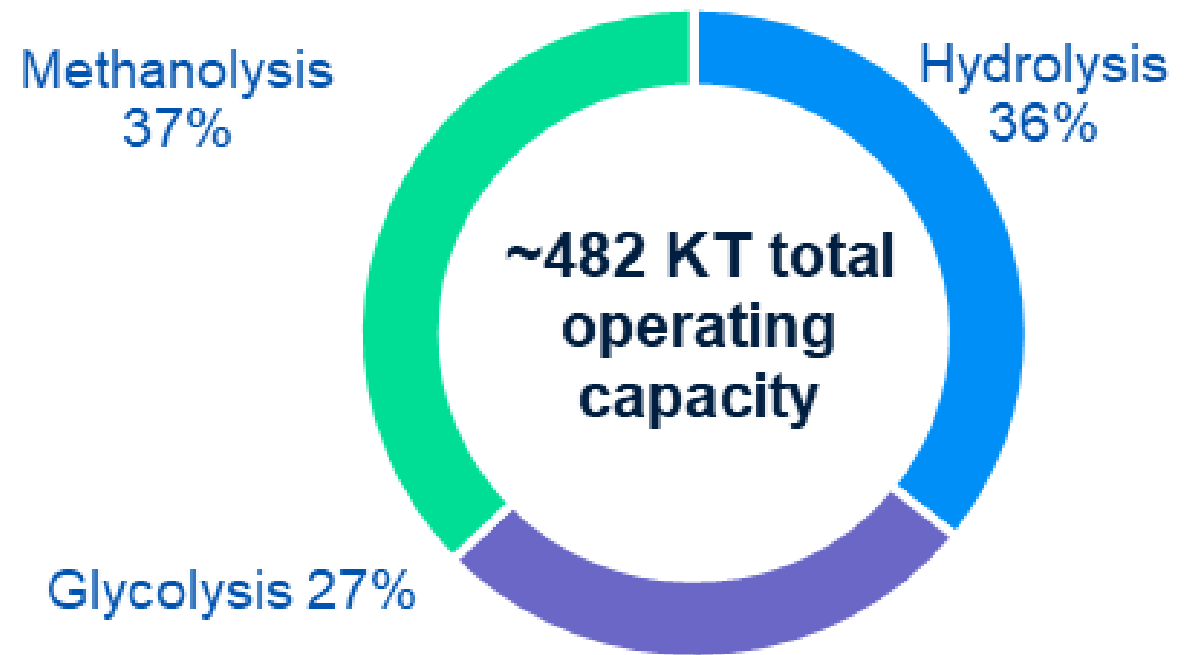
Developments in chemical recycling of PET



Chemical Depolymerisation
Installed (Input) Capacity, 2022



Chemical depolymerisation
Installed (input) capacity, 2027



Chemical Depolymerisation installed capacity operating in 2022 and planned operating capacity in 2027 (as announced) Source: ICIS Chemical – Recycling Supply Tracker, 2022



Average PET beverage bottle waste sorted for recycling rate in 2022



EU27+3 Average:
75%

Average recycled content in PET beverage bottles in 2022

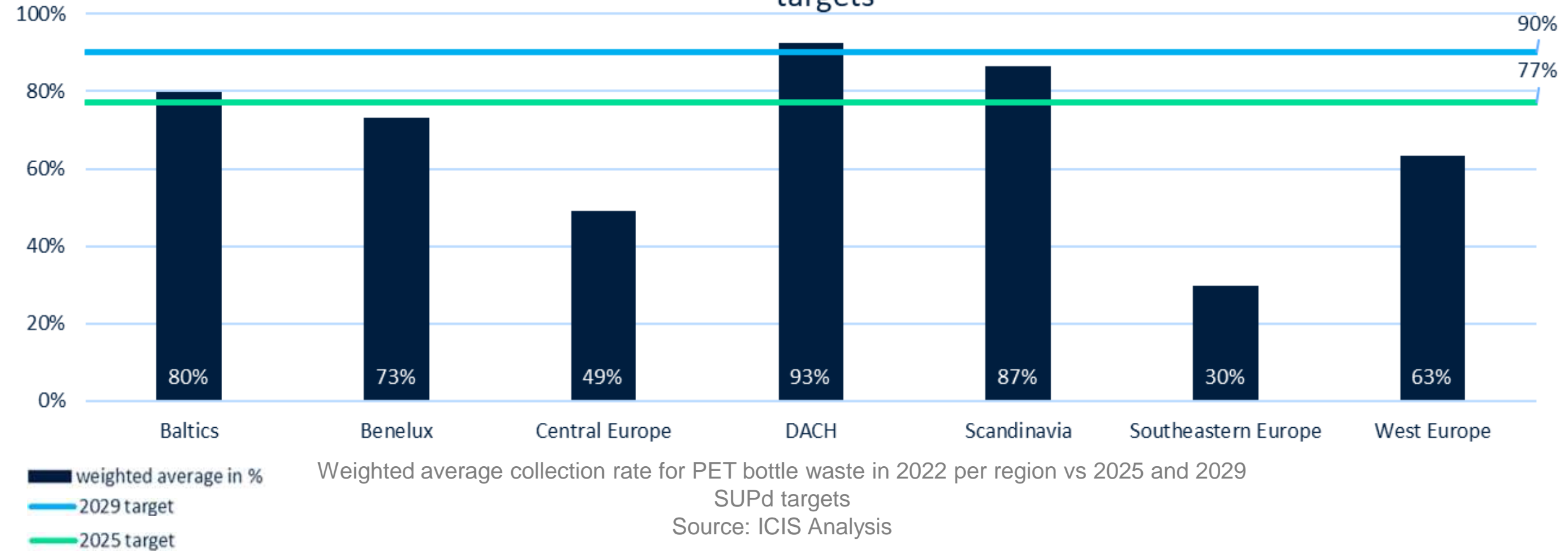


EU27+3 Average:
24%

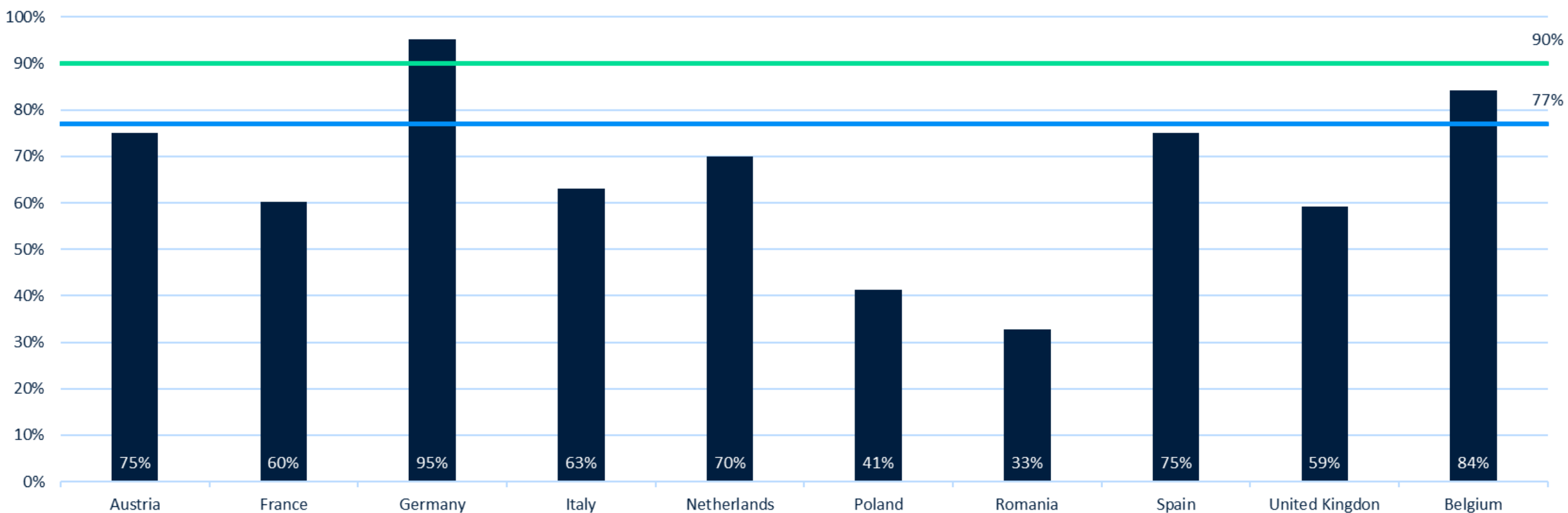


2022 Europe average rates for collection and recycled content.
Source: ICIS research and analysis.

Weighted average % of collection for bottles in 2022 per region vs. SUPd collection rate targets



Average collection rate of PET bottles in % vs SUPd collection rate targets



■ weighted average in %
— 2029 target
— 2025 target

Average collection rate for waste PET bottles in 2022 per country

Source: ICIS Analysis





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