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European waste paper sorting market to grow by 2025

Up to 220 sorting plants for paper and cardboard wastes will be commissioned in Europe by 2025. This growth will be based on the further expansion of separate waste collection systems and the renewal of the already existing plants. This is one of the results published in a new report by consultancy ecoprogram.

Europe currently has more than 2,000 sorting plants in operation that process paper and cardboard wastes. These facilities are mostly spread evenly across the continent, due to many European countries already establishing well-functioning collection schemes for paper and cardboard wastes.

Waste paper and cardboard sorting plants differ greatly by their technology. The number of facilities that sort only paper and cardboard wastes is quite low – about 380 of them can be found in Europe, reaching an average capacity of 41,000 t/a. They range from simple small-scale plants with low mechanisation levels to fully automated large-scale facilities with capacities over 100,000 annual tons. While the simple, small-scale plants are mostly located at peripheral locations in Southern Europe, the more technologically complex and larger plants are found in the densely populated areas of Germany, the Netherlands and Belgium.

Most of the plants in the UK and France sort waste from the dry recyclables bin. About 450 plants, with an average capacity of 60,000 t/a sort waste paper, lightweight packaging and sometimes glass. The processing of these mixed waste streams necessitates more complex sorting technology, which entails higher investments – and these will only pay off with large throughputs. In these sorting plants, paper and cardboard wastes account for about 50% of their overall input.

Most European sorting plants actually fall under the third category: i.e. 1,200 facilities that not only sort paper and cardboard wastes but also other dry waste streams. Compared to the facilities of the plants processing waste from the dry recyclables bin, the facilities of this category apply different kinds of technology – due to the waste streams that are collected separately and arrive in separate streams at the plants. The reason for this large number is because the plants are equipped with comparatively simple sorting technology for paper and cardboard waste, which enable many sites to profitably sort also smaller amounts of waste. Many of these facilities use manual sorting to greater extents than the plants that process waste paper only and so they reach a smaller average capacity of 28,000 annual tons.

Sorting paper and cardboard wastes will increase in importance by 2025. The amount of paper and cardboard wastes that can go to material recovery will continue to increase, as the separate collection systems are expanded and optimised, therefore also catching waste paper amounts that are so far going to landfills for disposal.

In light of the Chinese import restrictions, ways of using waste paper within Europe will become more important. However, this also calls for a more thorough sorting, as the European paper industry needs high-quality waste paper for their production processes.

By 2025, we estimate the paper and cardboard waste amounts from MSW to be available for sorting to increase by about 4.6 million tons to 48 million tons per year. France, the UK and Poland currently hold the greatest market development potentials.

France intends to expand the separate MSW collection in the next years. Furthermore, 3 million tons of sorting capacities should be constructed between 2013 and 2023. Many projects are currently being developed on the French market and this will continue into the future.

In the following years, the UK wants to standardise and optimise its inconsistent household collection system in the form of the dry recyclables bins. We expect this to result in further increasing amounts with many plants are already being planned.

In Eastern Europe, the Polish market shows the most concrete indicators for an accelerating market development. In the course of implementing the new national waste legislation, the separate collection of paper and cardboard and other types of waste streams should be implemented nationwide by 2022. We are aware of plans for constructing 56 sorting plants with a capacity of about 870,000 annual tons.

By 2025, Europe will require additional sorting capacities totalling 6.7 million tons. This already accounts for the fact that plants in the UK will not only sort paper and cardboard wastes but all waste streams from the dry recyclables bins.

Additionally, about 2.1 million tons of sorting capacities will be modernised or replaced until 2025, as some of the existing plants are already dated. This will mainly affect the large asset markets in Germany and Spain. In summary, this translates into about 160 newly constructed plants as well as 60 replacement or modernisation projects by 2025.

The study “The Market for Waste Paper Sorting in Europe” is now available at www.ecoprolog.com

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