

Policy in connection with paper for recycling

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- Paper recycling is a global champion
- Voluntary commitment since 2000
- Challenges ahead
- Waste policy review 2014



Recycling Champion



European Declaration on Paper Recycling:

- 13 associations along the paper value chain and the EU Commission
- Focus on ecodesign and waste prevention
- Target of 70 % for recycling by 2015 in 29 European countries

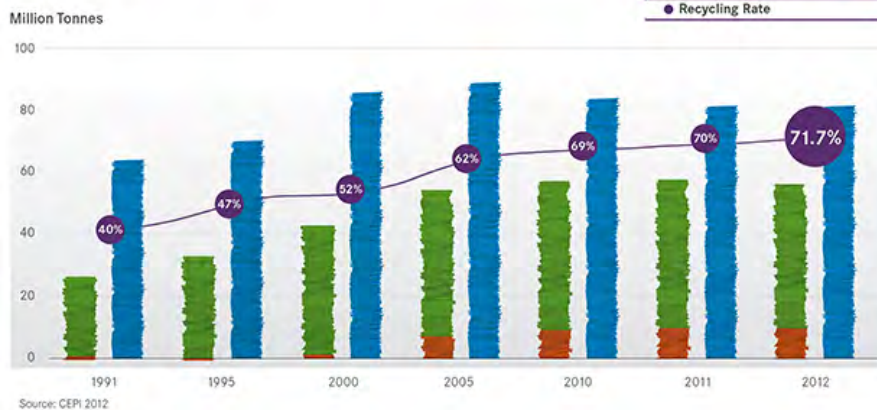
71.7 % of the paper is recycled

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Recycling Champion

EUROPEAN PAPER RECYCLING 1991-2012



Source: CEPI 2012

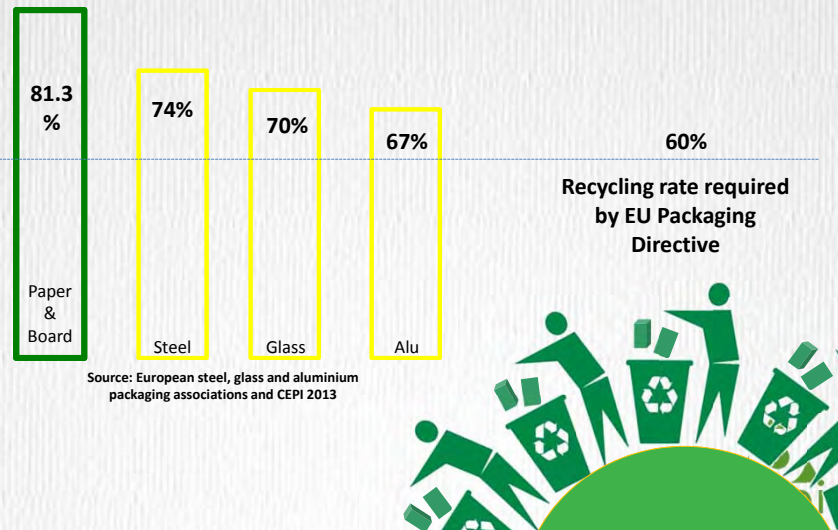
2012 EU paper consumption has dropped to the level of 1998 – **yet we now recycle 1.5 times the volumes we recycled back in 1991**

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Recycling Champion

EU Packaging recycling rates (2011)



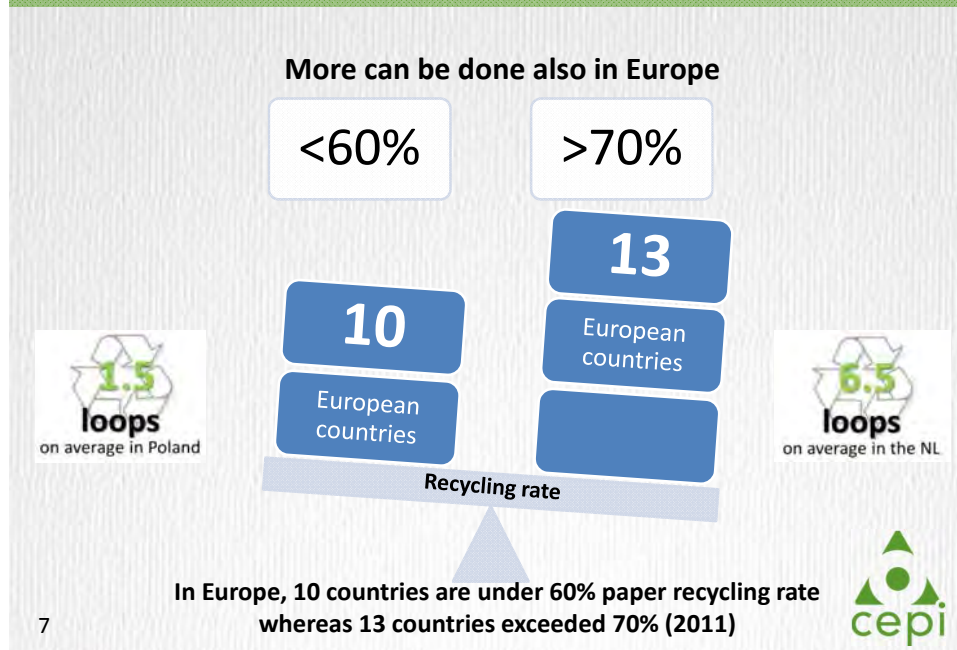
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Voluntary Commitment



Voluntary Commitment

Working with the value chain, along the life cycle

European Recovered Paper Council is a unique set up for taking voluntary action to support paper recycling in a framework of “European Declaration”

“From many aspects the Declaration is remarkable: the approach is voluntary, yet since 2000 it has helped accomplish tangible progress in terms of recycling rates and in terms of prevention. The Declaration has fostered dialogue between all actors implied along the whole value chain. It represents an integrated approach from meeting concrete results to developing ad hoc research and development activities.” (Janez Potočnik)

Voluntary Commitment

European Recovered Paper Council



2013 European Paper Recycling Award

Enter your innovative project or campaign that enhances Paper Recycling in Europe today and win the 2013 European Paper Recycling Award.

There are two categories for the award:

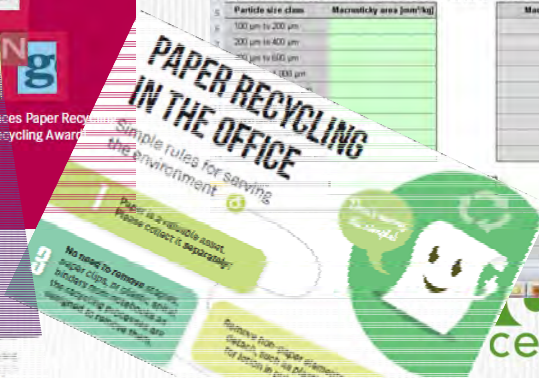
- Information & Education
- Technology Improvement & R&D

www.paperforrecycling.eu

Calculation of Removal Scores of adhesive applications

Input laboratory results according to INGEDE Method 12

Particle size class	Macrostickiness (mN/kg)	Calculated macrostickiness
100 µm to 200 µm		
200 µm to 400 µm		
400 µm to 600 µm		
> 600 µm		



PAPER RECYCLING IN THE OFFICE

Simple rules for serving the environment

- 1. Paper is a valuable asset. Please collect it separately!
- 2. No need to remove staples, paper clips, or punch holes. The recycling process will be designed to remove them.
- 3. Don't worry about it!

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Challenges ahead

Question of raw materials

Joint Position Paper on Recycling for a resource Efficient EU Economy

- CEPI, Eurometaux, EuPR, CIRFS, Eurofer, EuPC
- Explaining the functioning of the recycling value chain and the challenges recycling faces
- Concrete proposals for targeted policies needed

All sectors are awakening to the same issue: waste is a resource, but not yet understood by many – yet heavily competed for by some.

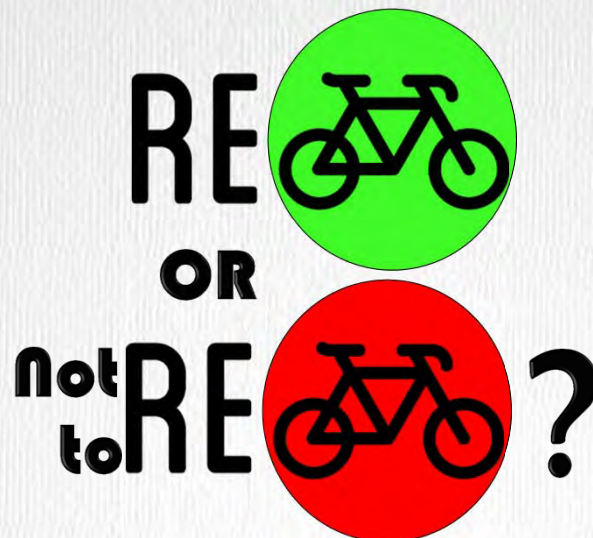
The EU policies, although no longer considering the issue as a “waste disposal problem” is still mostly dealing with it as an environmental issue.

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Challenges ahead

Policy signals for recycling



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Challenges ahead

No level playing field

- Paper industry supports global trade and a free market, but a pre-condition to this is a level playing field.
- Closing the EU borders is not a solution, but allowing the situation to continue erodes both the environmental and the economic foundations of sustainability.
- Result would be “exporting pollution” by promoting recycling in regions with lower environmental standards and “importing unemployment” as EU-based producers would suffer in competition.



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Challenges ahead

End-of-waste – less level playing field

+€4.3bn

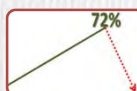
EU paper industry fibre cost will increase by €4.3 billion annually

- Collected paper moving from EU to Asia will be worth €4.3 billion of virgin market pulp annually.
- Neither is such volume of pulp available, nor is the EU industry able to pay the cost.
- EU cash manufacturing cost would increase by 9.8%, from €481/tn to €528/tn.



Gap between EU and China cash manufacturing cost increases from 17% to 29% to EU's detriment

- EU cash manufacturing cost is already burdened by cost of wood, chemicals, energy, labour.
- EU loses current only competitive advantage in resource-efficient fibre management.
- Also embedded energy in recycle will be lost, exacerbating EU energy balance.



Paper recycling in EU will reduce by 20% or 10 million tonnes

- As paper markets are fully exposed to global competition (unlike our export markets) the result will be increased paper imports to EU by our competitors
- Paper recycling in the EU will drop from 47 million tonnes to 37 million tonnes p.a. leading to closures of mills, including SMEs, and losses of 20,500 direct green jobs and additionally 140,000 indirect jobs in Europe.

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Challenges ahead

Risk posed by renewable energy policies (Pöyry, 2011)

Three scenarios looked at with conservative assumptions:
Paper is not preferred fuel in normal situations. However,...



Mandatory use of biomass in European coal-fired power plants



Waste incineration plant overcapacity building



Co-mingled waste collection expanding in Europe

← These scenarios are independent and can cumulate. →

At risk: 20
15 (Million tonnes)

+

5

+

5



Challenges ahead

Creating bio-economy

Using wood and paper for recycling for energy only...

1x added value

... with subsidies!

Policy supports wood-based energy production
The Renewable Energy Directive sets binding targets for EU Member States to reach their binding renewable energy targets. Member States have put in place financial incentives in e.g. green certificates or feed-in tariffs. Bioethanol is expected to provide 2% of renewable energy consumption by 2010 of which two thirds will be based on solid biomass from the forest. The support for the direct burning of wood to create renewable energy increases the pressure on the wood markets.

Burning wood out of the forest
This is one way of using our resources with otherwise low conversion efficiencies. It creates simple value and jobs, but...

... is this resource efficient?

There is a more clever way to use wood! Please turn the page to find out how ...



Challenges ahead

Creating bio-economy



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Paper industry is enabling a resource efficient bio-economy – if the EU policy framework is set right!



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Waste Policy Review 2014

1. **A review of key targets in EU waste legislation** (in line with the review clauses in the Waste Framework Directive, the Landfill Directive and the Packaging Directive);
 2. **An ex-post evaluation ("fitness check") of five of the EU Directives dealing with separate waste streams:** sewage sludge, PCB/PCT, packaging and packaging waste, end of life vehicles, and batteries;
 3. **An assessment of how the problem of plastic waste can best be tackled** in the context of the current waste policy framework, based on the publication of the Green Paper on a European Strategy on plastic waste in the Environment.
- This review will be informed by the 'aspirational objectives' (1) set out in the Resource Efficiency Roadmap recently confirmed in the proposal for a 7th Environmental Action Programme, as well as by the objective to ensure safe/sustainable access to raw materials as one of the key contributions to the Raw Materials Initiative.

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Waste Policy Review 2014

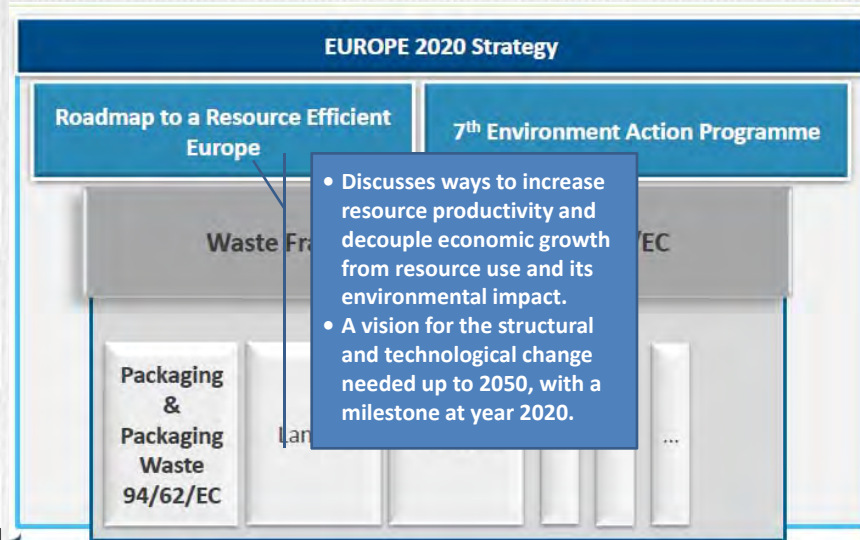
Nested policies



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Waste Policy Review 2014

Nested policies



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Waste Policy Review 2014

Nested policies



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Waste Policy Review 2014

Nested policies



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Waste Policy Review 2014

Paper industry's priorities

- Landfill and incineration ban for recyclable municipal waste
- Minimum collection targets for all member states
- Eco-design considered as a guiding principle throughout the life cycle
- Certification as a tool that can help the industry
- Producer responsibility – avoiding fiscal measures without value added for the industry and/or environment

All of these priorities have been prepared by CEPI in previous steps inserting them in the EU Raw materials initiative, in the Resource efficiency roadmap etc.

We are confident that the review will offer a good opportunity to further advocacy for paper recycling.

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Waste Policy Review 2014

10 September 2013: deadline targets review consultation

18 September 2013: Extended Producer Responsibility (EPR) workshop organised by the Commission to test preliminary results of the study on EPR

End September/Oct. 2013: Planned online stakeholder consultation on EPR

Next steps

Oct./Nov. 2013: Stakeholder workshop on fitness check

June 2014: Commission's proposal(s) on targets review

2015/2016: Proposal(s) by the Commission on the fitness check

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Thank you!

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