MONITORING REPORT 2017
European Declaration on Paper Recycling 2016-2020
RESILIENT EUROPEAN PAPER RECYCLING IN CHALLENGING INTERNATIONAL CONTEXT

Since 2000, the European paper value chain has been committed to the two-fold aim of enhancing recycling and increasing efforts to remove obstacles hampering paper recycling in Europe. The signatories of the new European Declaration on Paper Recycling declared their commitment to reach a 74% paper recycling rate by 2020.

In 2017, 72.3% of all paper consumed in Europe was recycled. The collection of paper for recycling has increased by 0.8% compared to 2016 and reached 59.6 million tonnes. Paper consumption has slightly increased compared to 2016 and reached 82.5 million tonnes. Therefore the recycling rate increased from 72.0% in 2016 to 72.3% in 2017. Compared to the base year of the Declaration (2015), collection and recycling of paper has increased by 0.5 million tonnes of paper.

A strong step towards the 2020 target of 74% has already been taken. We are however starting to reach the maximum potential, as about 22% of paper consumption cannot be collected or taken. We are however starting to reach the maximum potential,

In a year to year comparison, the total amount of paper collected and recycled in the paper sector has increased by 0.8% to 59.6 million tonnes, while consumption of paper has increased by 0.5%.

For the commitment period of 2016 to 2020, the recycling rate calculations are independently verified by Debatte.

RECYCLING RATE 2017: 72.3%

The recycling rate in Europe increased to 72.3% in 2017.

In year to year comparison, the total amount of paper collected and recycled in the paper sector has increased by 0.8% to 59.6 million tonnes, while consumption of paper has increased by 0.5%.

From a longer term perspective, recycling has increased by 49% (19.5 million tonnes) since 1998, the base year for the first voluntary commitment set in the European Declaration on Paper Recycling. In strong contrast, consumption since 1998 also increased up until 2007, dropped back to the initial level in the following years, and has only slightly recovered in the last four years.

In 2017 we also notice good achievements at regional level, despite differences continuing to exist. The number of countries with a recycling rate below 60% has further dropped to 7. Over the last year, the number of countries exceeding recycling rates of 70% was 15.

On an international level, Europe continues to be the world champion in paper recycling followed by North America. The paper recycling rates of other world regions are improving, but from lower levels. In Europe, paper fibres are used 3.6 times on average, while the world average is 2.4 times.

The EU has increased its targets for the recycling of municipal waste and packaging waste, it is clear that the functioning paper recycling chain is a key driver for meeting these targets. Paper recycling is an industry “Made in Europe”. It prolongs value creation and job opportunities in Europe from a renewable, predominantly European resource, wood.

Making recycling easy and simple year after year requires a huge effort by the paper value chain. We explain these efforts in our reports and are proud of the progress made.

A net volume of 9.5 million tonnes (15.9%) of the total 59.6 million tonnes was bought by third countries, mainly China, outside the commitment region of the EU-28, Norway and Switzerland. In August 2017, China announced import restrictions for certain waste streams, including paper for recycling. As a consequence, Chinese imports of paper for recycling have decreased in 2017. It can be expected that a further decrease of Chinese imports will take place in 2018.

The 2018 paper recycling rate will depend on continued high collection as well as the capacity of European paper recycling to absorb the volumes which China no longer imports.

1 The net trade of paper for recycling is included in the European paper recycling rate (72.3% in 2017). The recycling rate is defined as the ratio between used paper recycling including net trade of paper for recycling, and paper and board consumption. Without considering the net trade of paper imported by third countries for recycling outside Europe, the 2017 European paper recycling rate would have been 60.8% (up from 60.4% in 2016).
In addition to the separate collection of all packaging mandated by the newly adopted Packaging and Packaging Waste Directive, very much welcomed by industry, ACE has continued to work with national beverage carton associations to support recycling performances across Europe. The members of ACE, BillerudKorsnäs, Elopak, SIG, Stora Enso and Tetra Pak, have prepared the launch of a new association to coordinate the industry’s engagement across Europe. The new dedicated pan-European platform, which will start to deliver early 2019, will coordinate and drive EU-wide, as well as country specific solutions to optimise beverage carton collection and recycling. It will actively seek for alliances and partnerships with industry actors sharing similar needs to ensure and scale recycling solutions.

ACEPI has started engagement in a new European project, COLLECTORS, by serving on its advisory board. COLLECTORS is assessing waste collection systems beyond paper and board and intends to build on the outcomes from IMPACTPaperRec. FINAT has started a pilot for the collection of release liner in northern Italy.

The EPRC members, representing 12 sectors along the paper value chain, had committed to improving the recycling rate by 2020. By joining the European Declaration on Paper Recycling they demonstrate their commitment to qualitative targets. EPRC members are involved in initiatives to facilitate the recycling process and enhance greening activity. These notably include collection and applying ecodeign to paper products.

ECODESIGN

Important developments included a new version of the EPRC deinkability scorecard, listing exemptions to the deinkability test and the review process of the EU Ecolabel for printed paper products.

The EPRC’s deinkability scorecard now includes an annex listing exemptions to the deinkability test. With this annex, the widely-used deinkability scorecard takes account of those printing technologies and material combinations that are sure to deliver good deinkability results, based on past experiences. Testing remains a requirement for processes and material combinations for which there is not enough experience on their deinkability behaviour. The annex will be subject to future revisions based on new data.

The EU Ecolabel for printed paper products, originally adopted in August 2012, is due to be reviewed in 2018. INTERGRAF, the European Federation for Print and Digital Communication prepared for this review process.

The EU Ecolabel flower logo appears on printed paper products that meet strict environmental criteria. This include a recycled paper criterion and a recyclability criterion. Regarding recyclability, printed paper applying for the EU Ecolabel should be recyclable and the non-paper components shall be easily removable. It also has to prove deinkability according to the EPRC deinking scorecard. The EU Ecolabel for printed paper products goes beyond existing high environmental standards and promotes environmental excellence. More than 120 licences of the EU Ecolabel for printed paper products have been granted at European level, covering more than 330 printed products.

CEPI and ETSI, the European Tissue Symposium together with other associations, raised concerns at the highest level about a potential discontinuation of EU Ecolabel product groups, which could have affected the ecolabels for tissue and printed paper products. They have highlighted the success of the ecolabel for these product groups and the environmental benefits. Further to this, the European Commission has not gone forward with the removal of EU Ecolabel product groups.

RESEARCH AND DEVELOPMENT

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EDUCATION AND INFORMATION

FINAT, the European association for the self-adhesive label industry, has developed a short animated video to quickly explain the concept of release liner recycling to interested parties. The video will also be translated into other languages.

During LabelExpo, the largest exhibition for the self-adhesive label industry, FINAT had a dedicated release liner recycling desk to show visitors the process, the recyclable materials and the new end-products. At the exhibition, FINAT also presented the latest developments in a separate seminar.

EuPIA actively contributed to the planned revision of the EPRC Guide to an Optimum Recyclability of Printed Graphic Paper. EuPIA provided information to interested stakeholders relating to the suitability for food packaging of paper and board made from recycled fibres.

EUROPEAN PAPER RECYCLING AWARDS 2017

The European Paper Recycling Council organised the bi-annual European Paper Recycling Awards identifying the best and most innovative paper recycling projects in Europe. In the Innovative Technologies and R&D category, the project “Remake” by Italian paper company FAVI was ranked the highest by the jury. *Remake* integrates paper for recycling with waste streams from other industries to produce paper. In the Information and Education category, the “Spanish pulp and paper association, ASPAPEL was the winner, the, it’s Blue Birds project raised awareness of the separate collection of paper among Spanish municipalities thanks to an award scorecard.

The award ceremony took place on 18th October in the European Parliament and was hosted by Italian MEP Simona Bonafé, rapporteur of the Circular Economy package and by Spanish MEP Ayala Sender.

The deinking scorecard was promoted by EuPIA and its members to customers and other stakeholders.

INGEDE attended several events within the paper value chain giving presentations at some of them. “Trends in the quality of paper for recycling” focused on collection systems and used material from the IMPACT paper project. Other presentations such as “Known and New Challenges for the Deinking Process” and “Recyclability of printed paper products” both touched upon collection but mainly dealt with deinkability.

The data used to calculate recycling rates is collected by CEPI (the Confederation of European Paper Industries). It comes from a questionnaire sent by CEPI to its national member associations in 18 countries (Austria, Belgium, Czech Republic, Finland, France, Germany, Hungary, Italy, the Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, and the United Kingdom). National associations supplied the data, collected from their member’s mills and companies as well as official sources, where appropriate.

The data in this report includes paper for recycling utilisation and trade plus paper and board production, trade and consumption for non-CEPI members of the EU-28 (Bulgaria, Croatia, Cyprus, Denmark, Estonia, Greece, Ireland, Latvia, Lithuania, Luxembourg and Malta) and Switzerland. This data is obtained from Pöyry Consulting.

After submission to CEPI, the data may be adjusted by the source, in particular the trade data obtained from customs authorities. CEPI takes the adjustments into account, with the figures being considered as final and published in the subsequent report (e.g. 2016 figures in this report).

Following this rigorous process, the 2016 recycling rate has been confirmed at 72.5% as opposed to the initial figure of 72.1%.

For certain countries, the calculation of the mass of recycled paper and board based on paper for recycling utilisation and net trade has not produced a result considered to adequately reflect reality. Consequently, recycling in these cases has been based on actual paper and board collection for the specific purpose of recycling.

Other countries have adjusted paper and board consumption figures with the opposite impact.

All historical annual recycling rates have been recomputed based on the revised calculation methodology.

DATA QUALITY: 2017 DATA

CEPI has commissioned an external verification of the recycling rate calculation since 2000 (see Assurance Reports 2011 – 2015 by EY, 2006 - 2010 by PricewaterhouseCoopers and 2000 - 2005 by Pöyry in the respective Annual Reports).

For the ongoing five-year period, CEPI has decided to work with Deloitte to further improve data quality. As an annual exercise, data quality will be assessed using a method recently adopted by the European Commission for organisation environmental footprints and product environmental footprints. Specifically, this will cover geographical representativeness, time-related representativeness, completeness and the uncertainty parameter. CEPI will publish the assessment’s results on its website.

MONITORING REPORT 2017

PAPER & BOARD

Paper & board is the most recycled packaging material in Europe

20% - 20.7% CO₂ per tonne of paper

2005

2017

REDUCTION OF SPECIFIC EMISSIONS OF CO₂ PER TONNE OF PAPER PRODUCTION IN EUROPE 2005-2017

Source: CEPI 2017

EUROPEAN PAPER PACKAGING RECYCLING RATES

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Paper & Board
Steel
Glass
Aluminum

2017 PAPER PACKAGING RECYCLING RATES

Source
1 Paper: CEPI data from 2016
2 Steel: APEAL data from 2016
3 Glass: FEVE data from 2016
4 Aluminium: aluminium beverage cans, source: European Aluminums, data from 2016

Finland, France, Sweden.
Belgium, Finland, Sweden, UK.
The European Paper Recycling Council (EPRC) was set up as an industry self-initiative in November 2000 to monitor progress towards meeting the paper recycling targets set out in the 2000 European Declaration on Paper Recycling. Since then the commitments in the Declaration are renewed every five years.

The EPRC committed itself to meeting both a voluntary recycling rate target of 74% in the EU-27 plus Switzerland and Norway by 2020 as well as qualitative targets in areas such as waste prevention, ecodesign, and research and development.