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Special Reports

Plastics Recycling: Impact on the Polymers Industry

Background

With growing consumer awareness and legislative control, recycling is becoming an increasing part of the plastics processing industry and will impact demand for virgin plastic resin.

Changing legislation in China, the EC's "Closed Loop" initiative and improving sorting and recycling technologies will drive change in global dynamics over the coming years.

The plastics industry has been influenced by many key trends in recent years, including REACH, development of biopolymers, lightweighting, etc.; with recycling now at the forefront of industry focus.

Objectives

This report will address:

- What are the current regulations promoting recycling? For example, country specific recycling targets regarding landfill, ban of single-use plastic bags, etc.
- Which virgin plastic resins producers investing in recycling activities?
- What is the current virgin plastic resin demand in Western Europe and the United States and what is the outlook?
- How much virgin resin demand will be lost due to recycling?
- What is the impact of recycling on virgin polymer trade flows into and out of Western Europe and the United States?
- Could global disagreement on carbon emissions lead to changes on polymer tariffs?
- Which polymers, processing techniques and container designs will benefit from the increased focus on recycling?

Report Scope

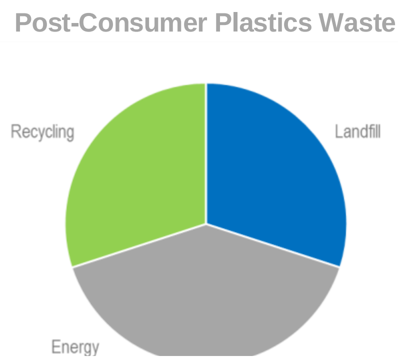
This report will focus on key polymers including: PET, LDPE, HDPE, LLDPE, polypropylene, and PVC in Western Europe and the United States.

Abstract

Recycling has already made a significant impact on the PET industry, where global recycling reached 10 million tons in 2016, or 13 percent of global supply. PET recycling grew fastest due to the pure form in which much of it is utilized in beverage bottles. Recycling has also been driven by designing-in recyclability into new containers, and the social dividend which brands can achieve by advertising the RPET content in their packaging. Apparel producers are now starting to embrace the branding potential from using RPET fibre.

Recycling in the other major polymer markets has been slower due to e.g. the level of compounding in PVC pipes and profiles, and the presence of other materials such as aluminium foil in HPDE containers. Efforts to design-in recyclability, and develop end-uses for the recycled materials however provide scope for growth.

The pursuit of economically viable recycling will drive substitution across the value chain, from container designs right through to the grades and indeed polymers themselves. Those practices and polymers which succeed in Europe will be adopted in the developing regions which are now struggling to reduce the impact of polymer waste.



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