Plastic grondstoffen voor recycling in Nederland

Presentatie Malietoren

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—

30-11-2023

Deze studie in het resultaat van uitgebreid onderzoek met bijdrage van de afvalverwekende- en chemische industrie

Primary research – Interviews

Participating companies[a]

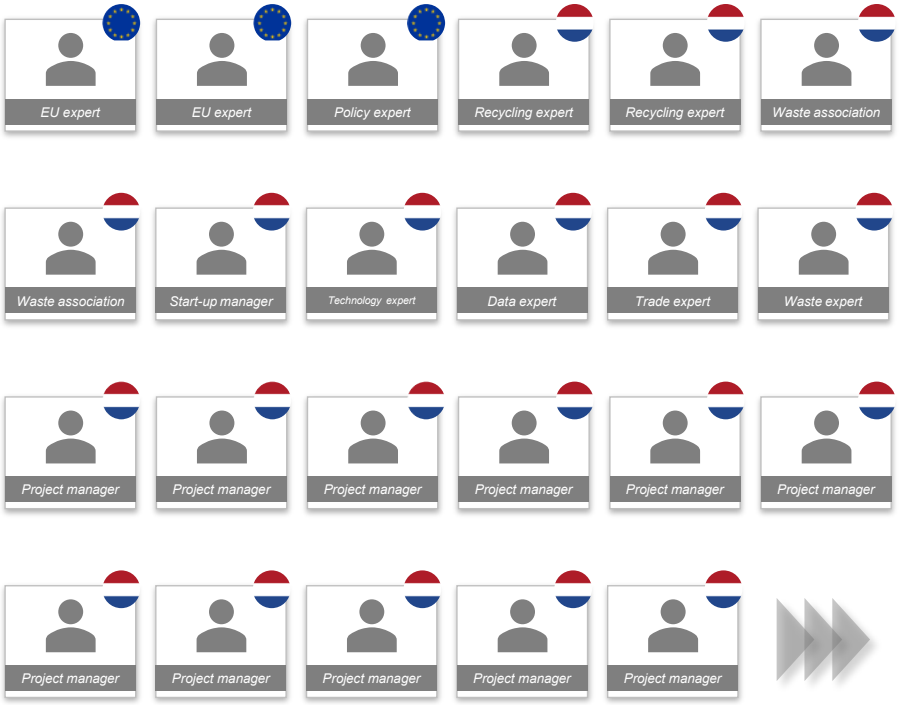
12 member firms from the Vereniging Afvalbedrijven

5 member firms from the Vereniging van de Nederlandse Chemische Industrie

14 other parties

Participating companies

30+ industry insiders from EU expert organisations and otherwise…



Note: (a) The mentioned parties do not endorse all the report's comments and findings.

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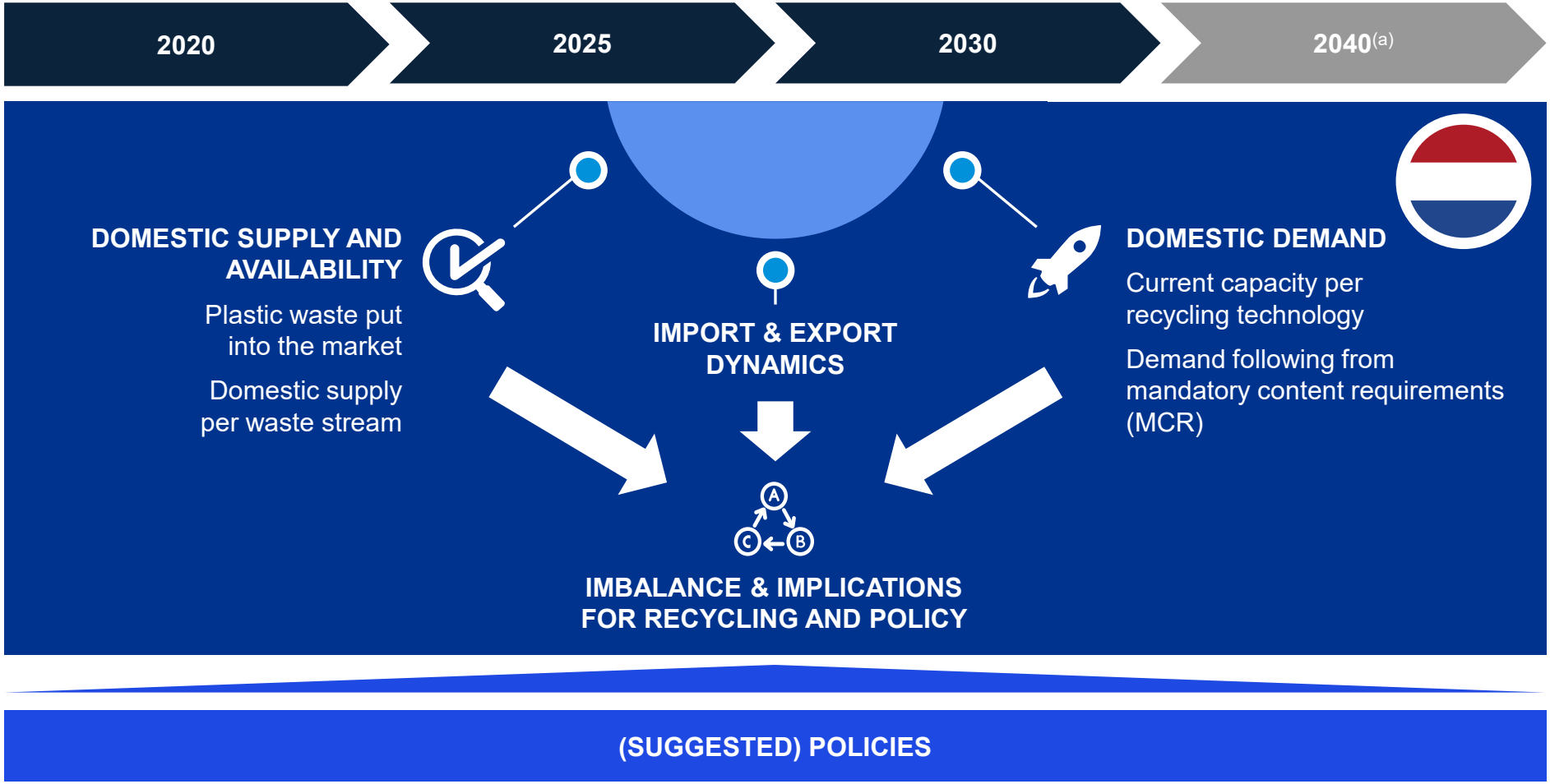
Het doel van deze studie is om vraag en aanbod van plastic afval in NL in kaart te brengen en beter op elkaar af te stemmen



Note: (a) Only 2040 forecast is made for the demand based on mandatory content requirements.
Source: KPMG analysis.

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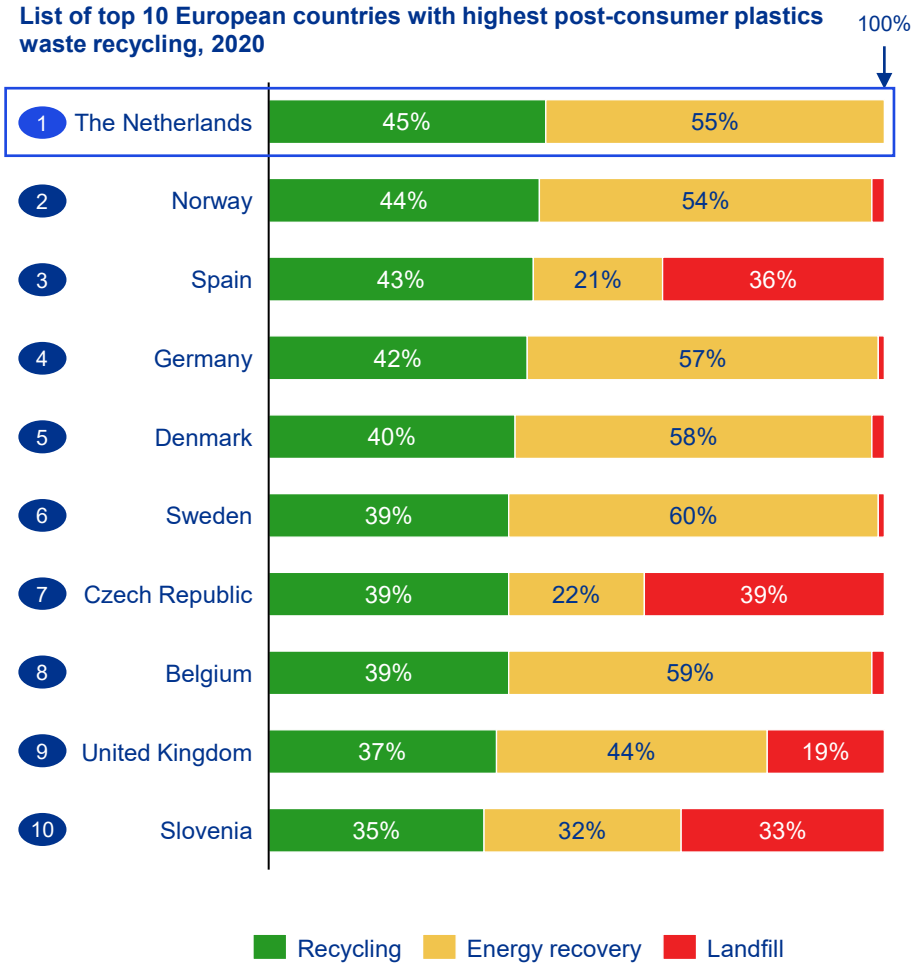
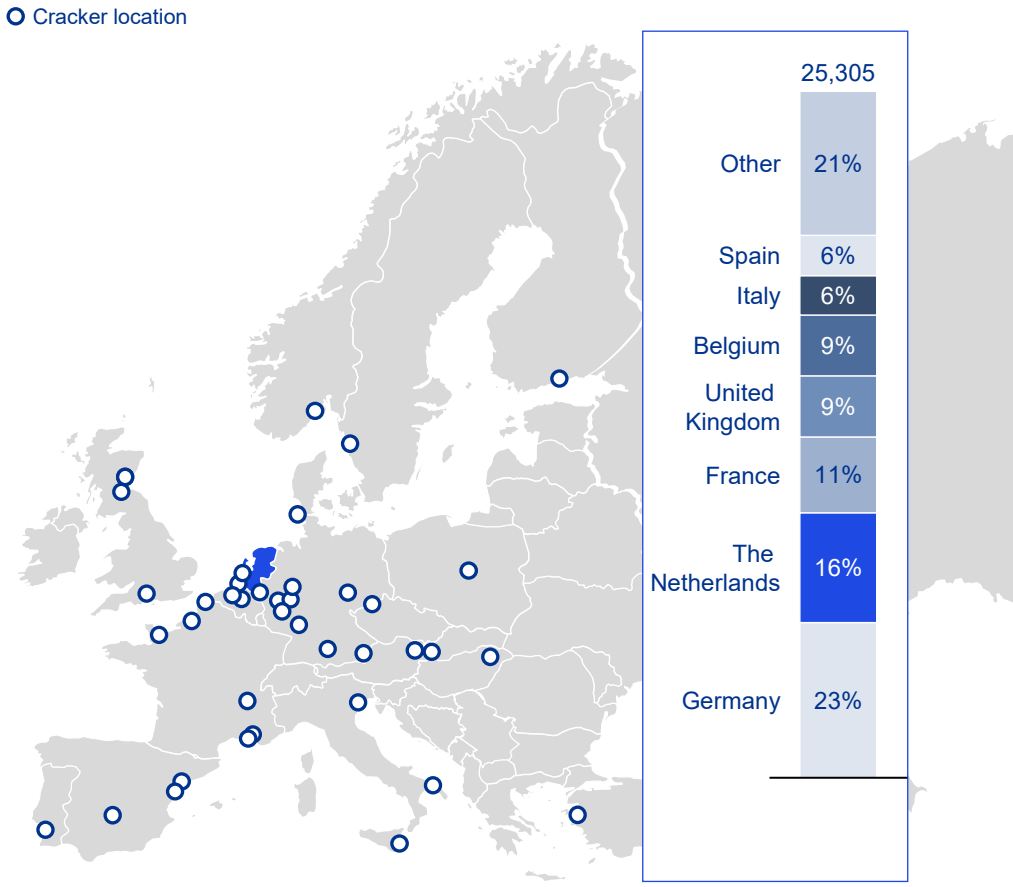
Nederland is een leider op het gebied van chemie en afvalverwerking en kan een leidende rol spelen in de transitie naar een circulaire economie

List of top 10 European countries with highest post-consumer plastics waste recycling, 2020



Share of European cracking capacity, Kt ethylene per year, 2021



Source: EcoProg, Petrochemistry, KPMG analysis.

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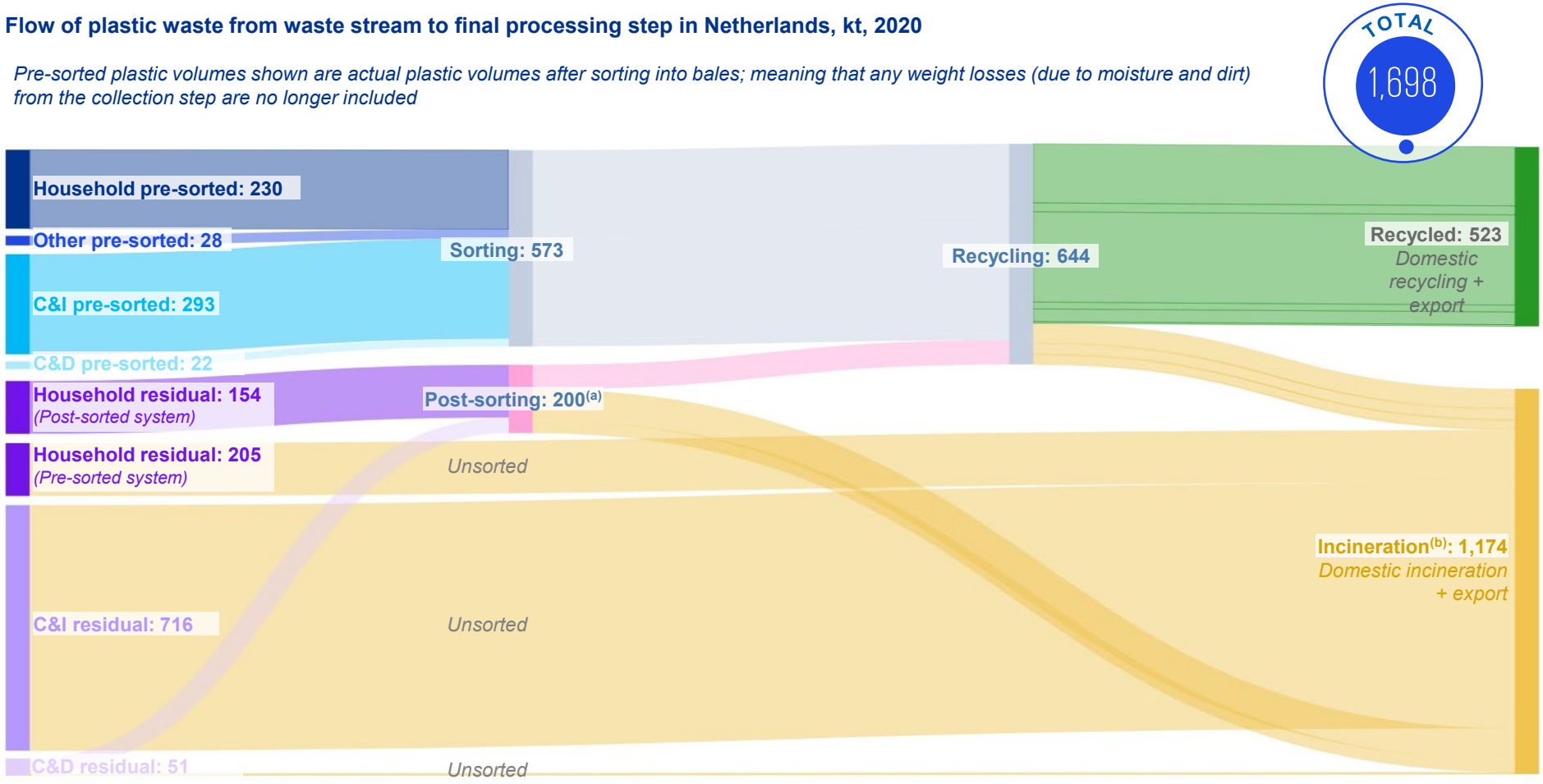
AANBOD: Momenteel wordt het grootste deel van plasticafval verbrand of geëxporteerd

Flow of plastic waste from waste stream to final processing step in Netherlands, kt, 2020

Pre-sorted plastic volumes shown are actual plastic volumes after sorting into bales; meaning that any weight losses (due to moisture and dirt) from the collection step are no longer included



Note: (a) A large share of available plastics in residual waste streams that are sent to recycling, are ultimately not sorted out (due to sorting inefficiencies). The fraction residual waste fraction that is not sorted out is sent directly to mostly incineration
(b) Incineration is Energy-from-Waste and SRF/RDF

Sources: CBS; Eurostat; Interview programme; KPMG analysis

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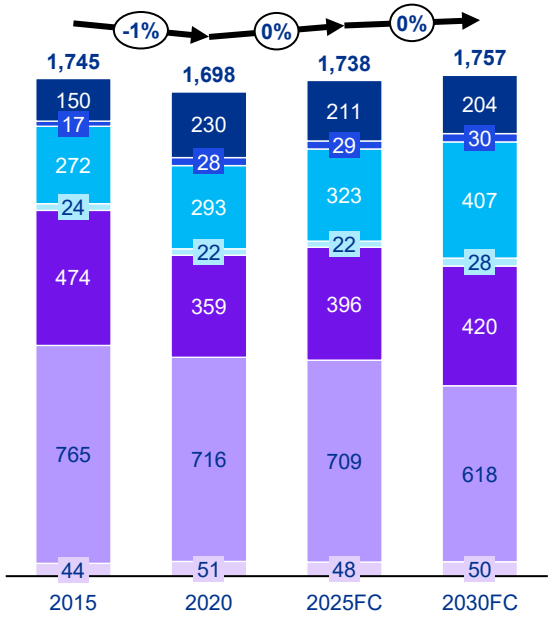
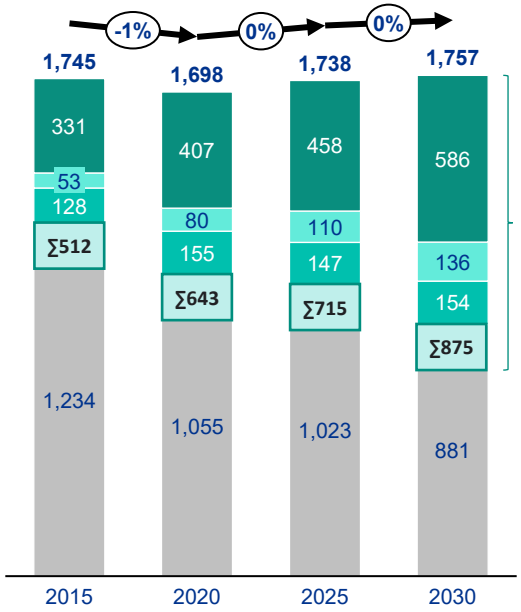
AANBOD: In 2030 zal er meer plasticafval naar recycling gaan, echter blijft er een enorm onbenut potentieel

Overview of total plastics per waste stream, kt, 2015-2030FC



CAGR (%)	'15-'20	'20-'30FC
HH pre-sorted	8.9	(1.2)
Other pre-sorted	10.3	0.6
C&I pre-sorted	1.5	3.4
C&D pre-sorted	(2.3)	2.6
HH residual	(5.4)	1.6
C&I residual	(1.3)	(1.5)
C&D residual	2.6	(0.1)

Overview of sorting output available for recycling, kt, 2015-2030FC



CAGR (%)	'15-'20	'20-'30FC
Monostream	4.3	3.7
Mixed films	8.6	5.4
Mixed plastics	3.9	(0.1)
∑ Available	4.7	3.1
Unsorted	(3.1)	(1.8)

Shift from pre-sorting to post-sorting residual (households)

Shift from residual to pre-sorting (C&I)

Improving sorting efficiency (for pre-sorting), design for recycling, increasing value of plastic waste

Increasing (post-)sorting leads to less unsorted plastics

Source: CBS; Eurostat; Interview programme; KPMG analysis.

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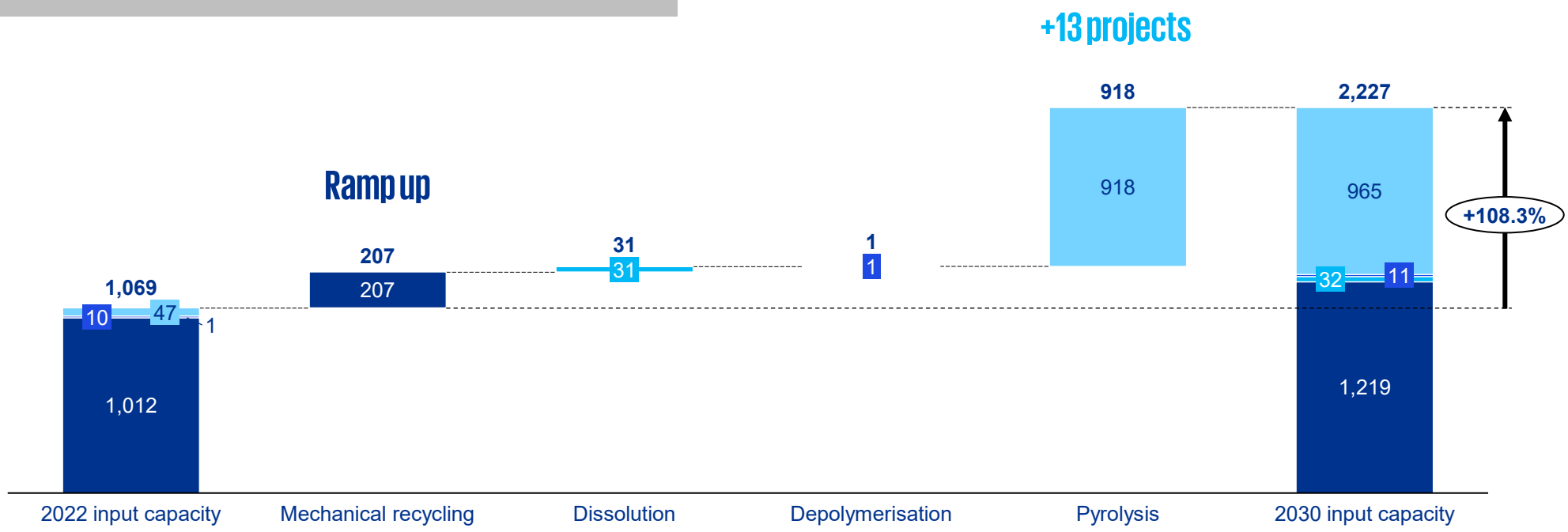
VRAAG: De vraag naar plastic grondstoffen uit afval zal een vlucht nemen als gevolg van de (verwachte) Europese bijmengverplichting

Overview of expected development of mechanical and chemical recycling input capacity[a,b], 2022-2030FC, kt

Beyond 2030 no projects are officially announced in the Netherlands



Note: (a) Based on a 95% capacity utilization for all recycling projects and 80% likelihood of construction for planned recycling projects;
(b) Realisation of recycling capacity is dependent on the acceptance of policies and legislation which would recognise the recycling methods as recycling and make the investments economically viable.

Source: Interview programme; KPMG analysis.

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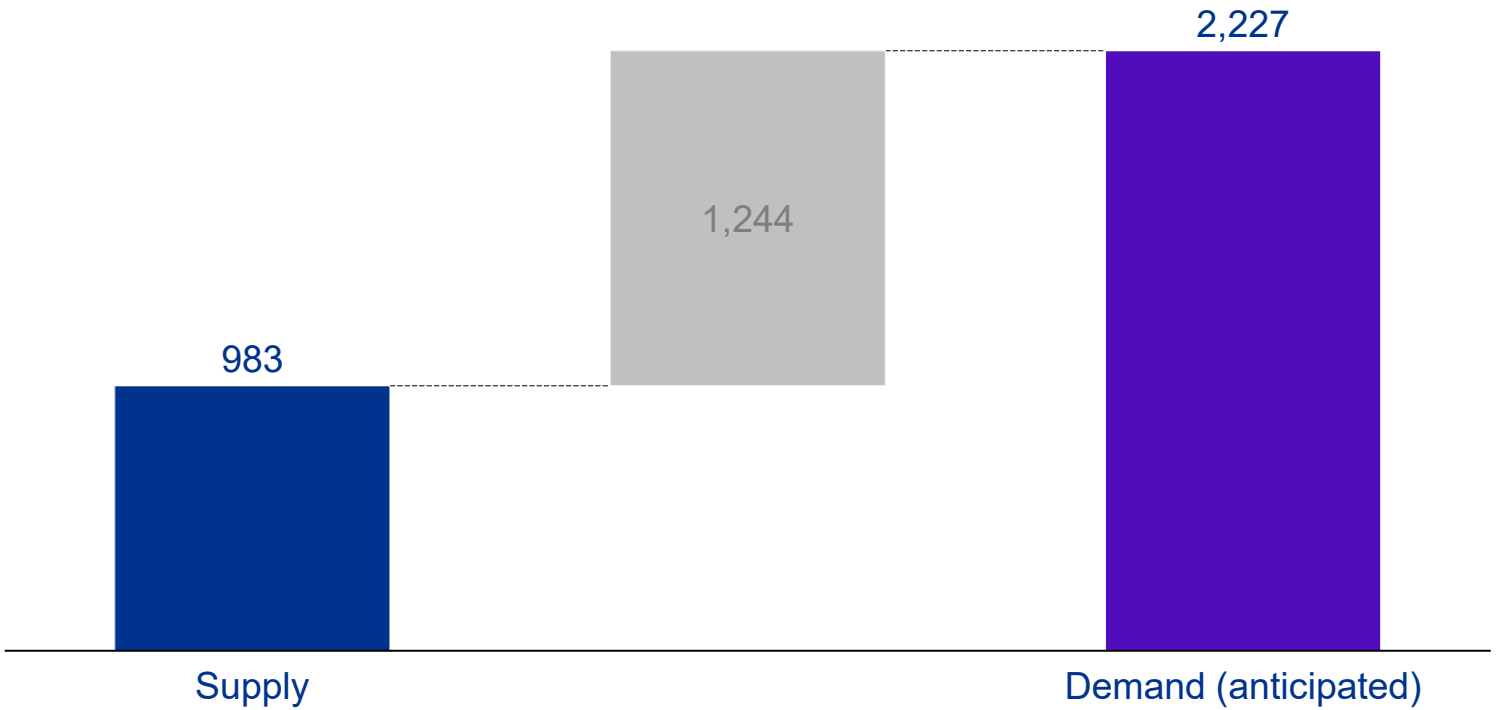
BALANS: Er is een duidelijke onbalans tussen de vraag en aanbod, wat vereist dat het aanbod omhoog moet gaan

Total overview of opportunities to increase supply (mass balance)[(a)], 2030, kt



Note: (a) Shortage is an underestimated as recyclers specialise in certain types of plastics and qualities and the 'fulfilled' demand likely does not fully match with supply.
Source: Interview programme; KPMG analyses

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Zelfs met zeer vergaande initiatieven komen we er niet...

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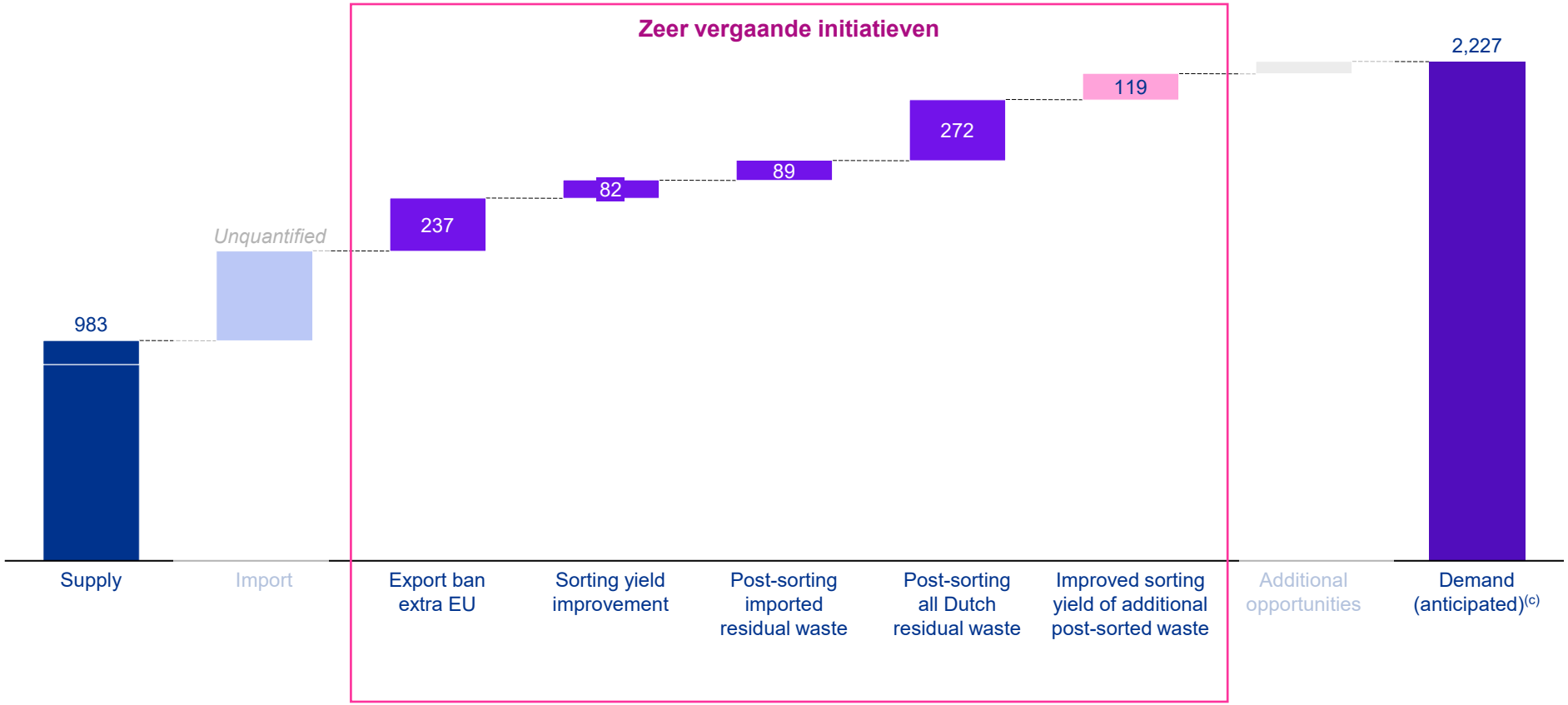

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...import zal de belangrijkste bron moeten zijn

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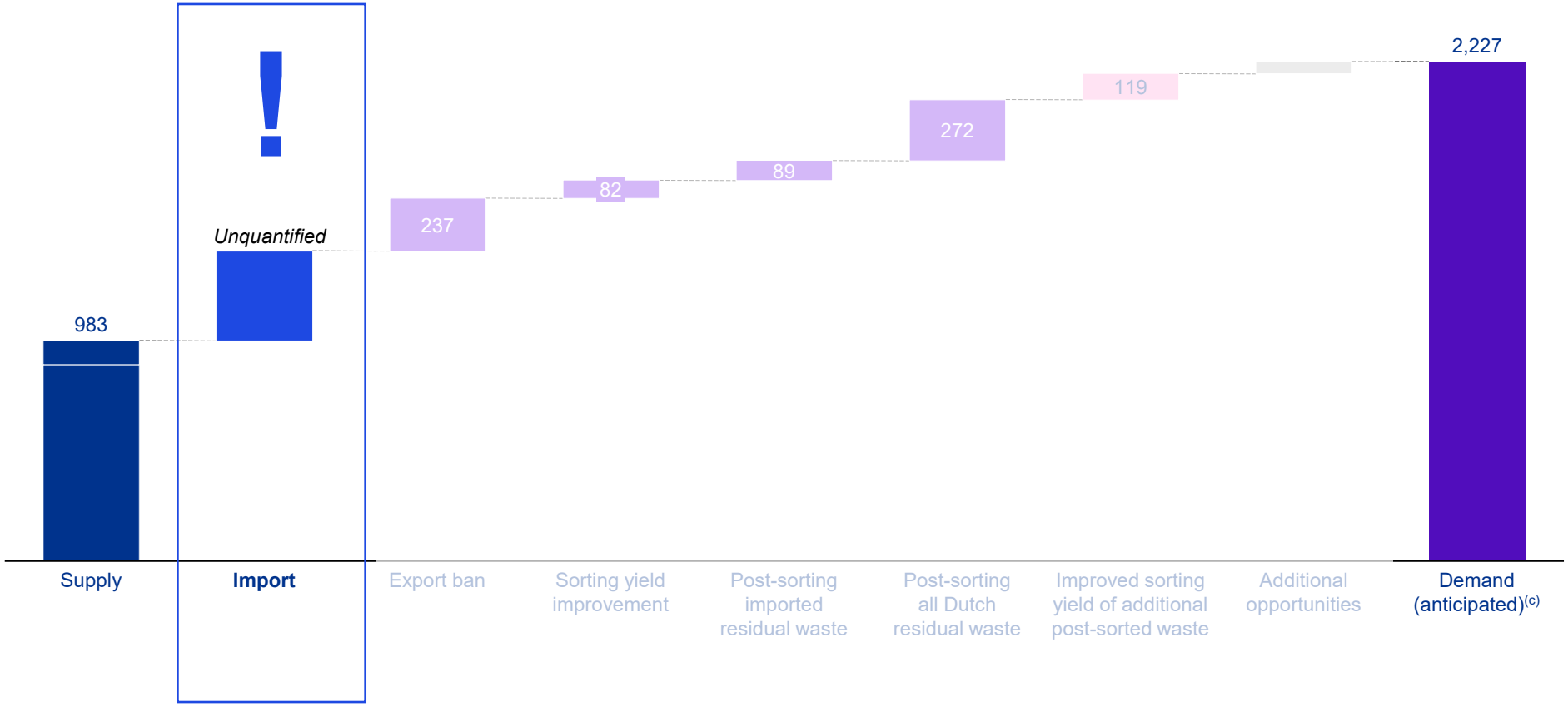

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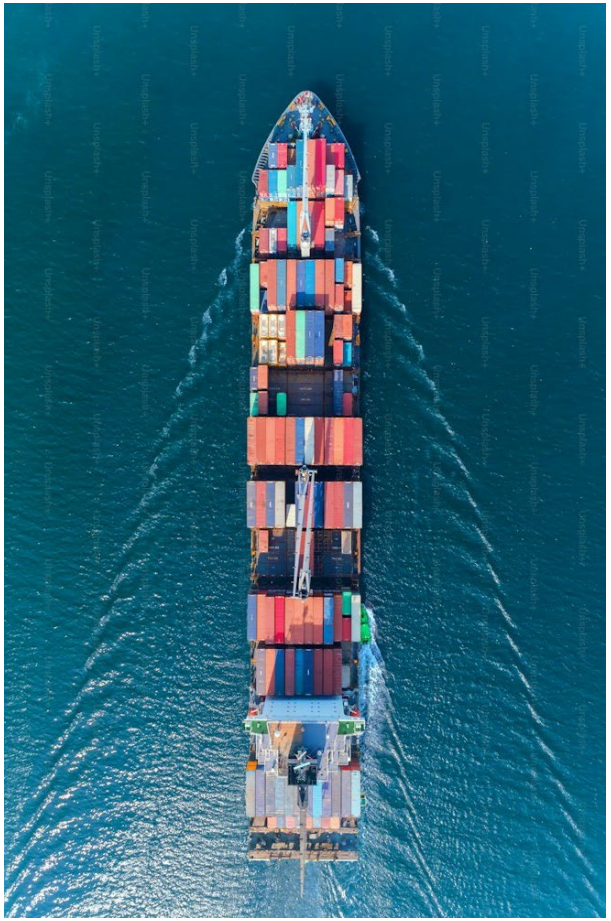
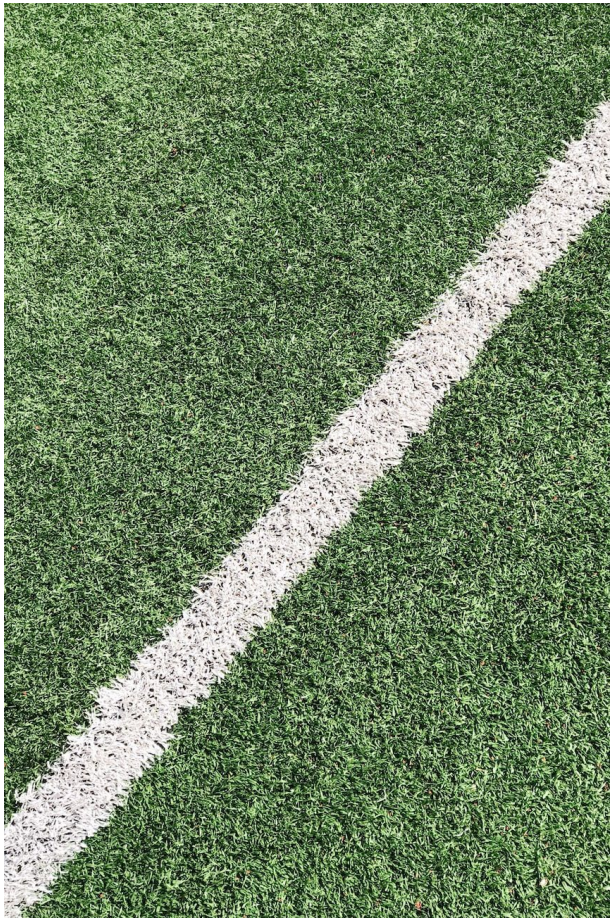
Wat is er nodig op Europees niveau?

Duidelijkheid omtrent de regelgeving

Extra-EU exportverbod



Een gelijk speelveld in de EU



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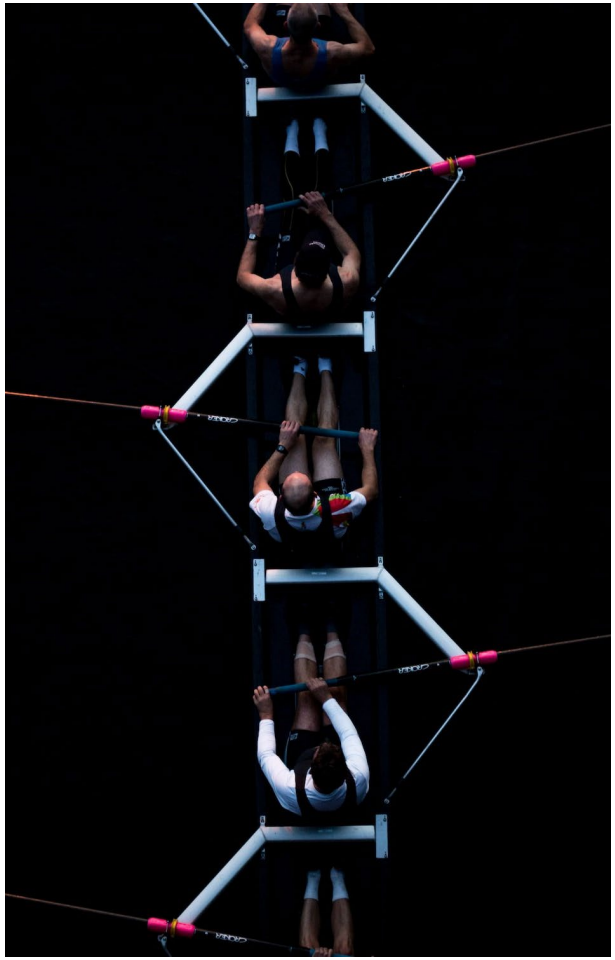
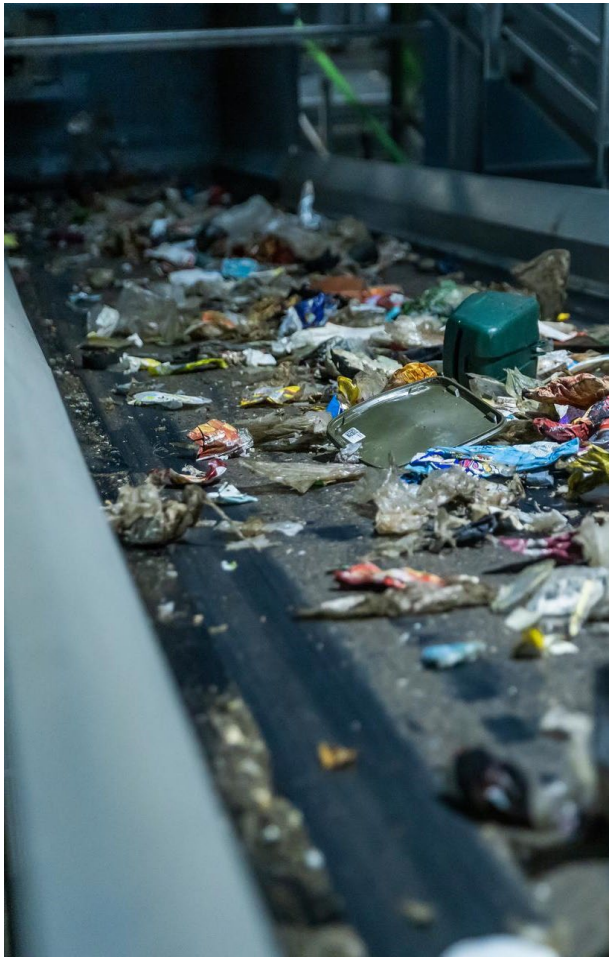
Wat is er nodig op nationaal niveau? (1)

Betere samenwerking



Betere sortering



Makkelijkere vergunning verlening

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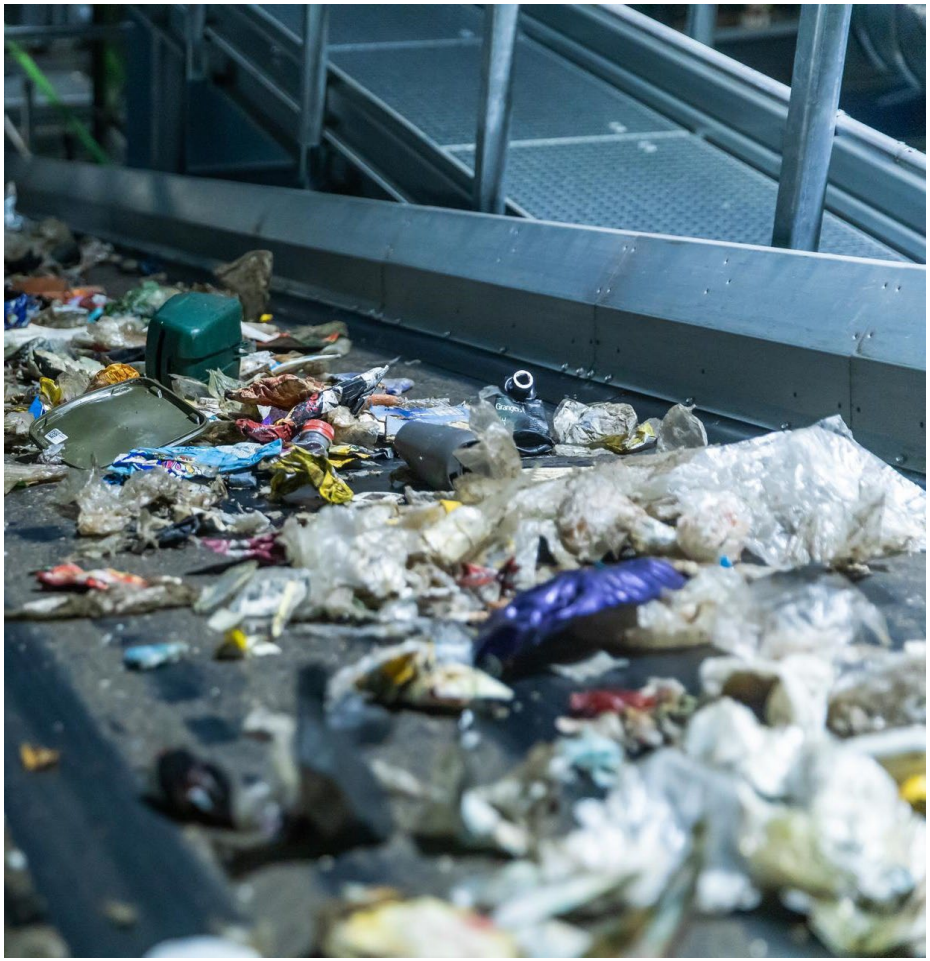
Wat is er nodig op nationaal niveau? (2)

Verbod op verbranden van ongescheiden afval



CO2 calculatie aanpassen

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Einde

Dank voor uw komst

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