PLASTICS EUROPE

Enabling a sustainable future

Plastics Industry in 2024

PlasticsEurope Polska Foundation’s Report

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Leading the Path to a Circular and Sustainable Plastics Future: The European Industry's Commitment to Circularity and Net-Zero

Virginia Janssens, Managing Director Plastics Europe

Plastics Europe is fully committed to supporting Europe's ambition to become the first climate-neutral continent by 2040. Plastics are crucial in enabling the EU's green transition, underpinning key sectors such as automotive, construction, renewable energy, healthcare, etc. However, the European plastics industry faces growing challenges, including a declining global market share due to uncompetitive energy costs, stringent EU regulations, and lengthy permitting procedures, leading among others to increasing imports of plastics.

Initiatives like the Antwerp Declaration, supported by Plastics Europe, underscore the need to balance green ambitions with a strong business case for investment in Europe. As we advocate for these vital policy and political changes, we proactively take responsibility for our industry's role in the transition to a sustainable future. That is why, in 2023, we published *The Plastics Transition* roadmap. For the first time, the European plastics industry stands united behind an ambitious yet achievable plan to reshape the European plastics system by making plastics circular, reducing lifecycle emissions to net zero, and promoting the sustainable use of plastics by 2050.

Our focus now lies in implementing the roadmap's targets. Our members are transforming their operations into more circular business models and investing in cutting-edge circular technologies. We are also strengthening collaboration across our various value chains to accelerate progress, as no single value chain partner can drive this transformational systemic change on its own. Our journey towards circular plastics is gaining momentum, as evidenced by the +70% increase in recycled content in 2022 compared to 2018, as the *Circular Economy for Plastics* report shows. This milestone is a significant step forward in Europe's journey toward plastics circularity. Yet, we can and will keep doing more.

As we progress, we must continue to receive the strong support of EU Member States and our partners across Europe. A harmonised approach is crucial to ensuring a level playing field that allows for the scalability of the enormous investments needed across Member State borders and beyond to fully realise Europe's Green Deal ambitions and our roadmap.

We thank our partners in Poland for their outstanding efforts and congratulate them on this report showcasing significant progress in advancing circularity and sustainability within the plastics industry. Their achievements are a testament to what can be accomplished when industry, governments, and stakeholders work together towards a common goal.

Umberto Credali, President of Plastics Europe Polska
(Basell Orlen Polyolefins Sp. z o.o.)

Dear reader of this report, In the coming pages, thanks to the dedication of our team here in Poland, you will find valuable data and fruitful information to support our industry's efforts towards an economically viable and sustainable circular economy.

While keeping track of very relevant events on a global level, such as negotiations for a Global Plastic Treaty, or on a European level, like the progress on the Packaging and Packaging Waste Regulation, Plastics Europe Polska team is continuously very active on a national level to support all of us actors of the value chain, from polymer producers to brand owners, from converters to consumers, to navigate the needed transition from a linear economy to a sustainable circular one.

Many efforts have been spent in promoting a dialogue and collaboration amongst all different players of the value chain and between the value chain and policy makers. Still a lot needs to be done, but when I look at the progress made and at the degree of engagement shown by many of you readers, I feel energized and optimistic about what we can achieve.

In the vast majority of applications, plastics have scientifically proven to be extremely beneficial and useful for the environment as the material delivering the needed set of features with the lowest carbon footprint. The key point is how to make sure that plastic waste is not exiting the circle and indeed wasted in the wrong places, besides making sure that the carbon footprint is reduced in every step of the process and that all these sacrosanct efforts are also economically viable for the European industry.

All this is within our industry's reach when we all work together and head in the same direction. I hope that you readers will be inspired by what you find in this report to continue our shared journey towards our common goal.

Anna Kozera-Szałkowska, Managing Director Plastics Europe Polska

This year has been a breakthrough time for our organization, as it brought – alongside many extremely important publications, reports and events – *The Plastics Transition* roadmap, which charts the route to a circular and net-zero plastics system in Europe by 2050. The map is an expression of the unity and common vision of the plastic system agreed by all member companies of Plastics Europe. Following the European strategy, the Polish team – with the support and engagement of the member companies – has made every effort to ensure that the ambitions and goals, together with the possible means of achieving them presented in the map, become the subject of attention and discussion throughout the value chain.

This report briefly presents the most important topics and areas of our activities from September 2023 to August 2024. I encourage you to use active links, which allow you to explore further topics interesting for you, and go to the discussed publications, positions or summaries published by Plastics Europe and the PlasticsEurope Polska Foundation.

The publication traditionally includes an analysis of market and waste data for Poland and the most important aspects of the current – increasingly dynamic – legislative situation. It also provides insight into our communication, educational and social activities, as well as a whole range of events and initiatives aimed at strengthening cooperation with the value chain and decision-makers.

I hope that this edition of our report will be not only a valuable and handy source of knowledge for you, but also a basis for drawing insightful and ambitious conclusions that will contribute to the further circular transformation of our industry.

The Plastics Transition
is our industry’s roadmap to a circular and net-zero plastics system in Europe by 2050, setting an ambitious yet realistic path to achieving our goals.

The Plastics Transition – our industry's roadmap

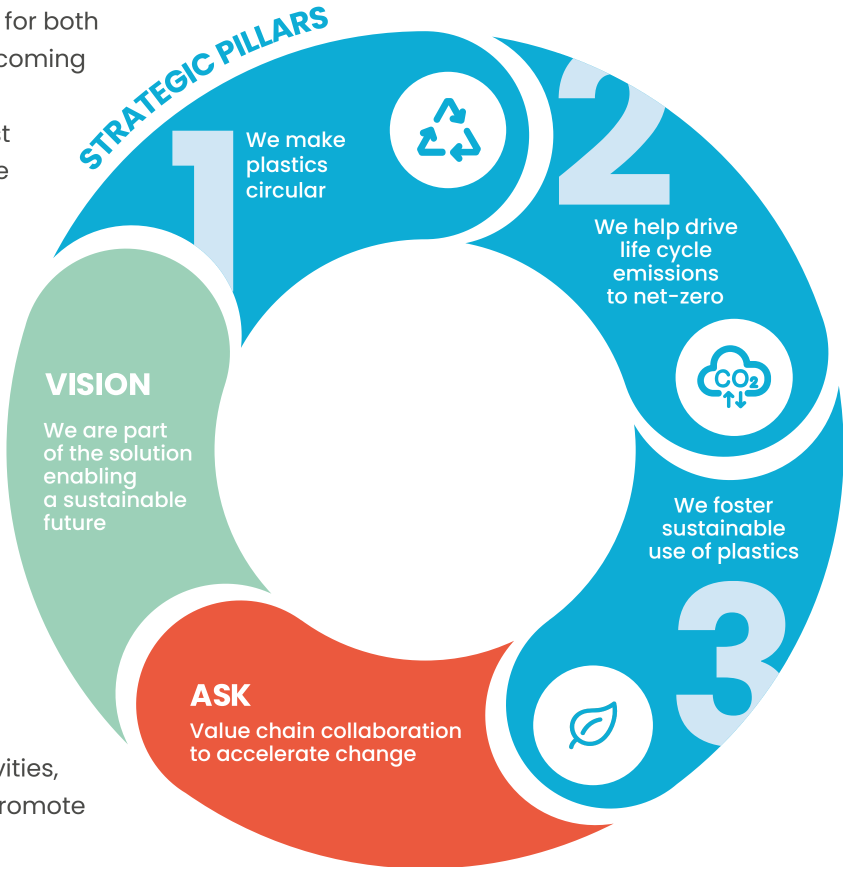
In the second half of 2023, European plastics producers united and launched *The Plastics Transition* – a roadmap that aims to accelerate the circular transition of the plastics system, reduce greenhouse gas emissions to net zero throughout the life cycle and support the sustainable use of plastics.

The document establishes a path to reduce greenhouse gas emissions from the entire plastics system by 28% by 2030 and to net zero emissions by 2050. At the same time, it envisages the gradual replacement of plastics made from fossil raw materials. It also estimates that circular plastics could meet 25% of demand in Europe in 2030 and 65% by 2050. It is expected that all additional investments and operational costs for zero-emission and circular production will amount to EUR 235 billion.

At the same time, the map identifies key levers and enablers for transformation and details immediate, short- and medium-term milestones and actions for plastics producers. It also points out that circularity by its nature requires a value chain approach, so it also includes recommended actions to be taken by decision-makers and stakeholders in the plastics value chain between now and 2030.

The roadmap will remain as a key document for both Plastics Europe and its local branches in the coming years. Also in Poland, from the moment of publication it has set the directions for almost all activities undertaken by the PlasticsEurope Polska Foundation. At the same time, the demands and appeals contained in the document are the subject of presentations, discussions and panels during numerous events in which the Foundation participates or organizes. To promote *The Plastics Transition*, numerous communication materials were created – a special content hub, press materials, industry articles, infographics, printed banners and brochures.

Plastics Europe Polska's activities are supported by member companies whose representatives are involved in creating communication materials, social media activities, take part in meetings on the roadmap and promote its messages during external events.



The condition of the plastics industry

The plastics industry is a significant component of the Polish economy, ranking third among industrial processing sectors in gross value added, following food production and metal manufacturing. This sector includes various players: (1) Producers and suppliers of raw materials in (polymerization and compounding, as well as importers and wholesalers), (2) Plastic converters (the largest subsector, consisting of manufacturers of plastic products), (3) Machinery and tools providers (companies that supply machinery and technological solutions for converters), (4) Recyclers. Almost all types of mass polymers are produced in Poland including polyolefins (HDPE, PP – Basell Orlen Polyolefins), LDPE (ORLEN S.A.), polyvinyl chloride (PVC – Anwil Grupa Orlen), polyethylene terephthalate (PET - Indorama), polystyrene (PS - Synthos) along with engineering plastics such as polyamides and epoxy resins, polyols (Grupa Azoty, Sarzyna Chemical, Lerg, PCC Rokita).

Recent global declines in industrial production have also impacted Poland's plastics sector. Although there has been a slight recovery globally, European data remains concerning. **Plastics Europe reports** indicate a 1.7% average decline in European industrial production in the first quarter of 2024 compared to the previous year. While production increased in Germany and Spain, three others – France, Italy, and Poland – experienced decreases. Energy-intensive sectors are not the only ones facing reduced orders; many industries are struggling with declining demand. In the first quarter of 2024, basic plastic production in the EU rose by 2.7% compared to the previous quarter and was higher than last year, largely driven by orders from outside Europe. However, current production levels remain approximately 20% lower than before the onset of the war in Ukraine.

1. Data for2022, Statistical Yearbook of Industry - Poland 2023
https://stat.gov.pl/en/topics/statistical-yearbooks/statistical-yearbooks/statistical-yearbook-of-industry-poland-2023,5,17.html [access date 29 08 2024]

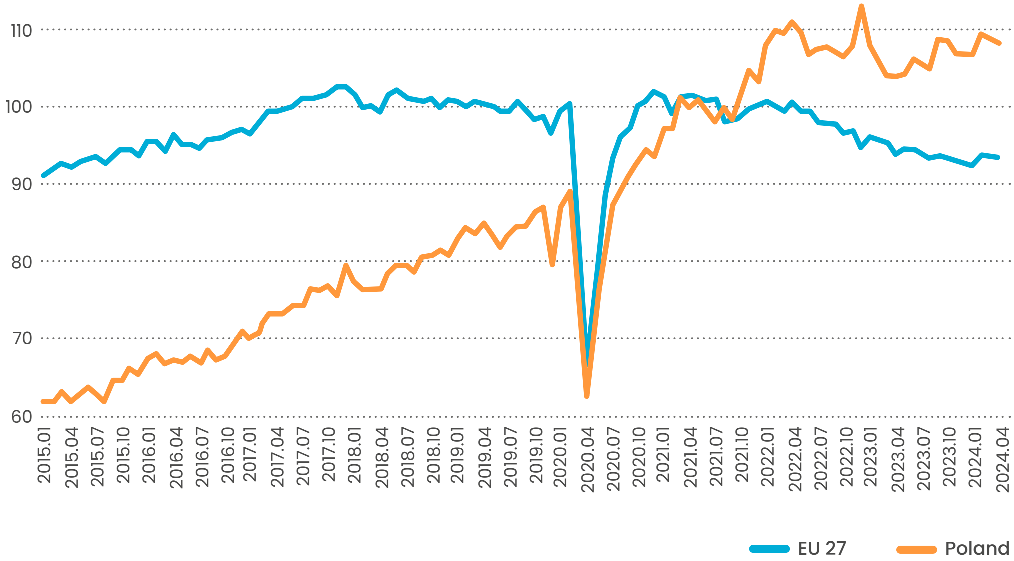
The Polish plastics industry compared to Europe

In the long term, the plastics industry in Poland is developing at a steady pace compared to Europe. A significant decline in production was recorded in 2020 during the Covid-19 pandemic; however, the production growth process began in the third quarter of that year, reaching a high level again by the end of 2021.

Since 2022, the impact of the war in Ukraine and the resulting energy crisis in Europe has become evident.

MONTHLY SALES DYNAMICS OF PLASTIC AND RUBBER PRODUCTS, 2015-2024

Production index 2021 = 100, constant prices



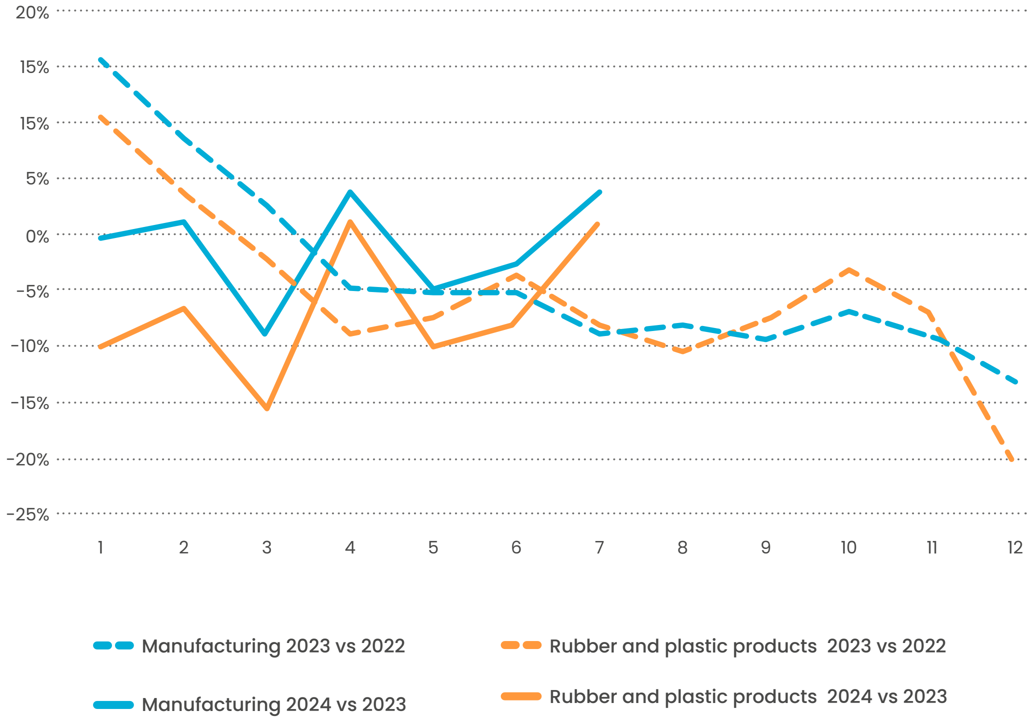
Source: Own study based on Eurostat data

At the turn of 2022 and 2023, the production of rubber and plastic products fell off the growth path and remains stagnant with a downward trend. Low global economic indicators contributed to reduced demand for plastic products.

Monthly sales dynamics indicators, after declines in 2023 (Q1 and Q4), indicate significant market uncertainty in the first half of 2024, with no clear signs of recovery in either the rubber or plastics sector or the entire industrial processing sector.

MONTHLY SALES DYNAMICS 2022, 2023 AND 2024

(CURRENT PRICES)

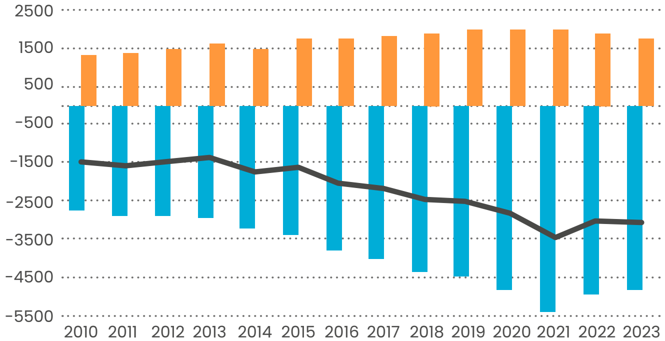


Data source: Own study based on GUS (Statistics Poland) data

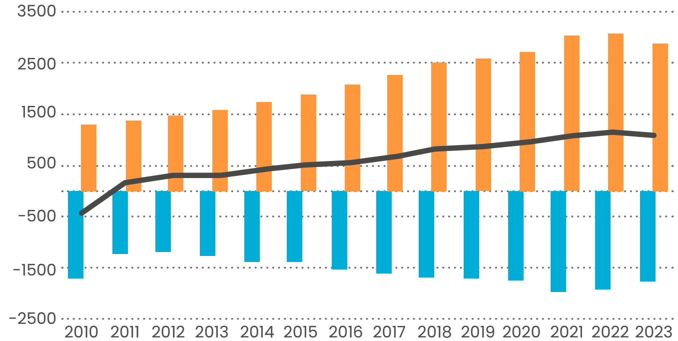
Foreign Trade

Poland has been a net importer of plastics in primary forms and a net exporter of plastic products for many years. Germany remains the main trading partner, accounting for nearly 30% of both exports and imports concerning both primary plastics and plastic products. In 2023, imports of plastic products from China increased – China is the second-largest trading partner with our country by volume (13%).

FOREIGN TRADE BALANCE
PLASTICS IN PRIMARY FORM
(thousand tons)



FOREIGN TRADE BALANCE
PLASTIC PRODUCTS
(thousand tons)

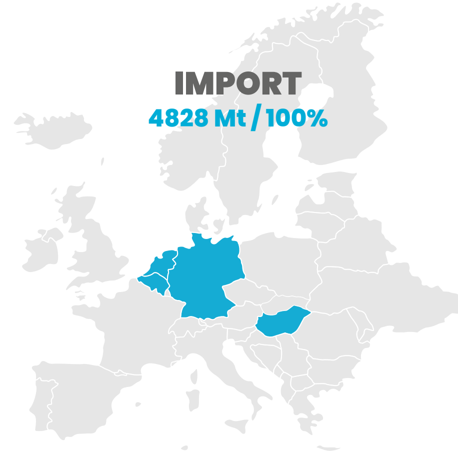


Import Export Balance

Data source: EUROSTAT

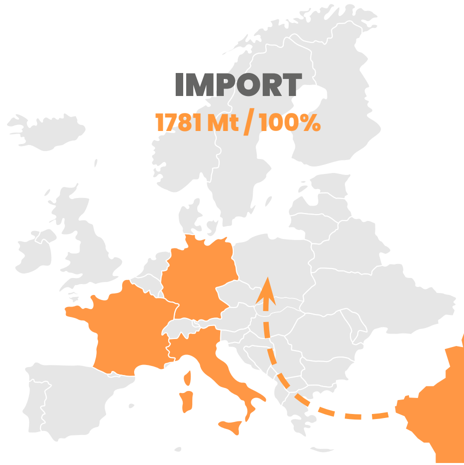
PLASTICS (PRIMARY FORMS)
MAJOR TRADE PARTNERS

Export	Import
GERMANY 557 Mt / 32%	GERMANY 1213 Mt / 25%
CZECH REPUBLIC 152 Mt / 9%	BELGIUM 676 Mt / 14%
UKRAINE 138 Mt / 8%	NETHERLANDS 538 Mt / 11%
ITALY 133 Mt / 8%	HUNGARY 238 Mt / 5%



PLASTIC PRODUCTS
MAJOR TRADE PARTNERS

Export	Import
GERMANY 792 Mt / 28%	GERMANY 521 Mt / 29%
CZECH REPUBLIC 206 Mt / 7%	CHINA 238 Mt / 13%
FRANCE 196 Mt / 7%	ITALY 147 Mt / 8%
ITALY 180 Mt / 6%	FRANCE 79 Mt / 4%

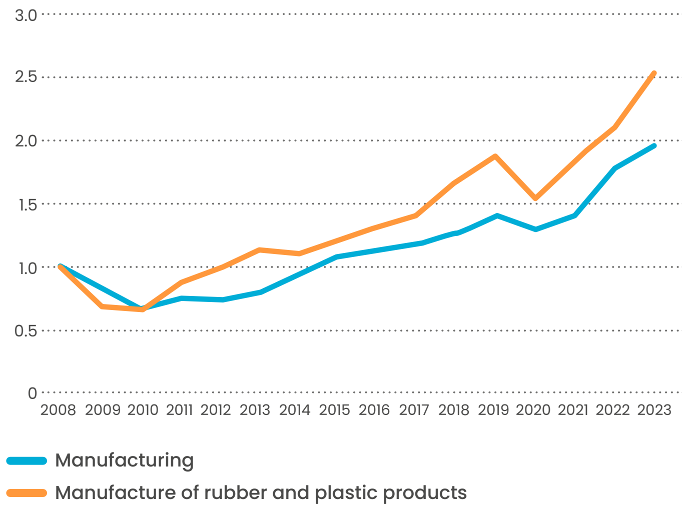


Investments in the Polish plastics industry

Capital expenditure in the rubber and plastic products manufacturing sector have been growing at a rate similar to the entire manufacturing for over 10 years. After a decline in 2020 (caused by the COVID-19 pandemic), the plastics industry recorded an increase in investments over the next three years. In 2023, expenditure on them amounted to PLN 7.36 billion, which means they were more than twice as high as in 2013 (PLN 3.28 billion).

In terms of investments in the plastics (primary materials) production sector, delays in the implementation of large projects to expand production capacity at PKN ORLEN and the Grupa Azoty should be noted. The company is to make a decision on the future of the Olefins III investment, whose projected cost has increased to almost PLN 25 billion, before publishing the updated strategy, which was announced for December 2024[2], while Grupa Azoty is currently focusing on finding a partner for the Police Polymers[3] project.

INVESTMENTS IN THE PLASTICS INDUSTRY IN THE CONTEXT OF THE ENTIRE MANUFACTURING (2008-2023) 100% = 2008



Data source: Own study based on GUS (Statistics Poland) data.

2. https://energia.rp.pl/energetyka-zawodowa/art41007091-przyszlosc-olefin-orlenu-rozstrzygnie-sie-do-konca-roku [access date 29.08.2024]
3. https://grupaazoty.com/aktualnosci/grupa-azoty-publikuje-szacunkowe-wyniki-finansowe [access date 29.08.2024]

Towards circularity of production and conversion

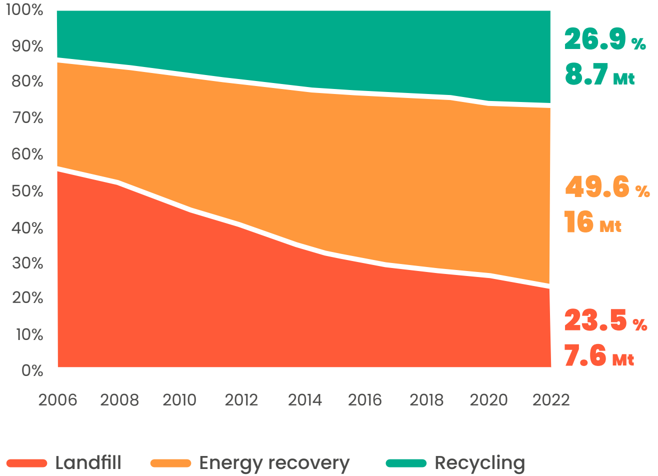
Published every two years by Plastics Europe, the report ***Circular Economy for Plastics – A European Analysis*** aims to support the transition of the plastics system in Europe, increasing the understanding of changes and trends in the circular plastics economy among all stakeholders. Published data is essential for guiding and verifying the transition of the industry and the wider plastics system. It also plays an important role in supporting evidence-based policy making. This year's edition presents new data on European plastic production, plastic conversion – production of plastic products and parts, plastic consumption, collection and processing of plastic waste. Various recycling technologies and the production of plastics from non-fossil raw materials, i.e. bio-based plastics, bio-attributed plastics and plastics obtained by capturing and using carbon, were also discussed. The report is supplemented with **infographics for individual European countries**.

Poland ranks eighth in terms of the amount of plastics produced in Europe, with production of 2.4 million tons. This represents a 4.1% share in European production. Production of the so-called circular plastics (recyclates and plastics from bio-based raw materials) was 30.7%, with the EU average of 19.7%. In terms of plastics conversion, Poland ranks fifth in Europe in terms of quantity, with a share of 7.2%. In 2022, 3.9 million tons of plastics were converted in Poland. The share of processed circular plastics (from recycling and bio-based raw materials) in Poland is 16.4%, with the average for Europe being 19.2%.

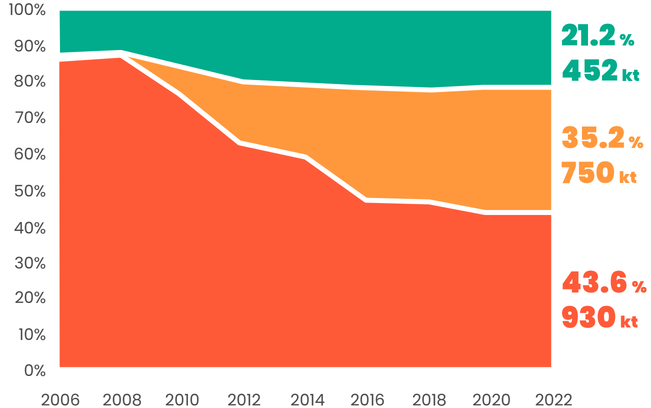
The pace of the plastics industry circular transformation

The Circular Economy for Plastics report confirmed that the transformation of the plastics system towards circularity with accelerated significantly between 2018 and 2022. This is evidenced by a 70% increase in the availability of recycled materials from post-consumer waste since 2018 (6.8 million tons in 2022), as well as the

PLASTICS WASTE MANAGEMENT IN EUROPE



PLASTICS WASTE MANAGEMENT IN POLAND



Data Source: Plastics Europe, The Circular Economy for Plastics, 2022 fact that circular plastics now account for 13.5% (7.3 million tons) of all plastics used in the production of plastic products and parts in Europe. Meanwhile, the recycling rate in Europe reached 26.9% (8.7 million tons) in 2022, marking the first time that more plastic waste is being recycled than sent to landfills.

In this year's publication, a new methodology for calculating recycling rates was applied for the first time, in accordance with Directive (EU) 2018/852. According to the new measurement requirements, the weight of packaging waste is assessed at the moment it enters the recycling process. Using this method, recycling rates for non-packaging plastic waste were also recalculated. In Poland, 2,132 thousand tons of plastic waste were collected in 2022. Only 452 thousand tons were recycled, 750 thousand tons were sent for energy recovery, and as much as 930 thousand tons were sent to landfills. The stable growth in the amount of waste being recycled is a positive trend; however, the dynamics of recycling development are clearly lower than those for energy recovery. Compared to the European average, recycling in Poland is developing significantly slower—the amount of waste recycled in Europe has increased by 22.5% since 2018, while in Poland it has only risen by 8.7%. The level achieved in 2022 (21%) is also significantly lower than the average for all of Europe (26.9%). In Poland, a large portion of plastic waste continues to be landfilled—in 2022, the share of waste sent to landfills (44%) was nearly twice as high as the European average (23.5%).

How to increase recycling levels in Poland?

According to data published by Plastics Europe, selective waste collection is crucial for achieving high recycling rates. The amounts of plastic waste recycled from selectively collected streams significantly exceed those recycled from mixed waste streams. Therefore, the proposed changes in the 2024 Waste Act, which suggest eliminating the requirement for selective collection of construction waste (including plastics) in favor of a mixed waste sorting requirement, will limit recycling opportunities for this group of waste and support their energy recovery instead. The development of recycling is also hindered by calls to equate the status of using RDF (Refuse-Derived Fuel) in cement kilns with recycling processes and including these operations in official statistics when calculating recycling rates. Therefore, the industry, gathered as the Coalition for Plastic Recycling, has advocated for greater support for developing recycling technologies and its absolute priority over energy recovery, following the waste management hierarchy.

COLLECTION AND TREATMENT OF POST-CONSUMER PLASTICS WASTE (2022)

2,132 kt

VIA **MIXED** WASTE COLLECTION

1,212 kt

2.9 % RECYCLING

40.1 % ENERGY RECOVERY

57.0 % LANDFILL

VIA **SEPARATE** WASTE COLLECTION

920 kt

45.3 % RECYCLING

28.7 % ENERGY RECOVERY

26.0 % LANDFILL

Source: Circular Economy for Plastics 2024, Plastics Europe

In Poland plastics waste **recycling rates are x15.6 higher when collected separately**, compared to mixed collection streams.

According to the ambitious scenario set out in ***The Plastics Transition*** roadmap, by 2050 65% (42 million tons) of all plastics used by converters will be produced from circular raw materials.

Focus on European plastics industry competitiveness

The past 12 months have been marked by intensive advocacy in the field of legislative work related to the implementation of the Circular Economy package and the European Green Deal, directly or indirectly related to plastics and products made of them, including their impact on the environment and the management of their waste. The Foundation was involved in work in the area of national legislation and cooperated within the European network of the Plastics Europe association.

In national legislation, with a two-year delay the process of transposition of the SUP Directive into national law was completed by publishing the Act of April 14, 2023 amending the Act on obligations entrepreneurs in the field of certain waste management and on product fees and certain other acts together with implementing acts to this act, i.e. Regulation of the Minister of Climate and Environment of December 9, 2023 on fee rates to cover the costs of waste management arising from single-use plastic products and the Regulation of the Minister of Climate and Environment of December 7, 2023 on fee rates for single-use plastic products that are packaged. In turn, the obligations arising from the SUP Directive covering bottles with deposits plastic drinks were introduced by the Act of July 13, 2023 amending the Act on packaging and packaging waste management and certain other acts, commonly referred to as the Act on the deposit system. The latter legal act aroused a lot of controversy, and industry organizations in discussions with the legislator repeatedly pointed out the need to carefully look at the proposed solutions in terms of not only costs, but also their feasibility and effectiveness, especially when the time available to prepare the system is so limited – the system is to be implemented already in 2025. Although the public perceives the deposit and deposit system as a huge step in the right direction, as an industry we pointed out that it covers only a few percent of the plastic packaging stream and should be a complement to the well-functioning Extended Producer Responsibility system, which is neutral towards all materials. This last topic – improving EPR in Poland - has recently been widely discussed, so that its assumptions could be presented this year, as announced by the Ministry of Culture and National Heritage. The legislator has a difficult task to reconcile all stakeholders, but every effort should be made to ensure that the agreed solutions actually improve and finance the current inefficient waste collection and recycling system, are consistent with EU and national law, contribute to achieving the best possible collection and recycling results, and allow for the elimination of current irregularities from the system.

In turn, in European legislation, the pace of work was dictated, on the one hand, by the approaching end of the term of office of the EU authorities and the European elections, and, on the other hand, by the need to choose priorities for the next 5 years. **In terms of general priorities, the issues of protecting European competitiveness and the EU free market while maintaining ambitious environmental goals came to the fore.** **In this discussion, the industry indicated**, among other things, that any future European industrial agreement complementing the Green Deal should develop and stimulate the market for sustainable carbon dioxide emissions to maintain competitive balance on a global scale. In this context, the need to create market incentives in product regulations was pointed out, which is crucial for the transition to sustainable coal sources. These actions can dovetail with the update of the EU Bioeconomy Strategy, as well as the ongoing implementation of the Circular Economy Plan and the EU Industrial Carbon Management Strategy.

From the point of view of our industry, the most important European legal acts recently processed are the Packaging and Packaging Waste Regulation (PPWR), Eco-design for Sustainable Products Regulation (ESPR) and the project regulation on the prevention of granulate losses (more on page 31).

Chronologically, work on the regulation on the eco-design of sustainable products (ESPR) was completed first. This regulation will have a direct impact on many groups of plastic products and raises not only issues related to the design of more circular and energy-efficient products, but also regarding business models of cross-sectoral cooperation, the role and protection of consumers and the importance of coherent and uniform legislation. It was defined, among others, as the first group of priority products and materials, which included: iron, steel, aluminium, textiles (especially clothing and footwear), furniture, tires, detergents, paints, lubricants and chemicals (plastics as such were not included in the first group). Eco-design requirements for these products, aimed at reducing their environmental impact, will be introduced through delegated acts, while mandatory public procurement requirements (aimed to increase the supply/demand for more environmentally friendly products) will be established through implementing acts. A public internet portal will be created, managed by the European Commission, where consumers will be able to search and compare information contained in digital product passports. Other important elements of the regulation include, among others: criteria for harmonizing penalties for non-compliance with eco-design principles, bans on the destruction of unsold products and obligations imposed on online trading platforms in the context of compliance with European legislation.

The schedule and scope of work under the draft PPWR regulation has required enormous mobilization and cooperation from the industry throughout the value chain. Despite reservations about the lack of material neutrality undermining the initial goal of the PPWR, which is to reduce the amount of packaging waste, the industry supported the adoption of the regulation within the timeframe.

The regulation establishes requirements covering the entire life cycle of packaging in terms of sustainable environmental impact: including design, labelling, placing on the market, collection, treatment and recycling of waste. The requirements will fall not only on producers, but also on every participant in the value chain and on EU Member States. The regulations apply to all packaging, regardless of the material used, and to all packaging waste (not only commercial and bulk packaging, but also transport packaging, e-commerce; waste generated in homes, offices, commerce, production, industry, etc.). The text adopted at the last meeting of the outgoing European Parliament is ambitious and requires well-thought-out additional legal acts necessary to implement the regulation in a timely and realistic way. From the point of view of our industry, the key factors will include, among others: a comprehensive assessment of the impact of established reuse targets on selected applications, especially in transport packaging.

Legally establishing mandatory recycled content targets for the packaging sector is a clear signal to the industry that demand for recycled plastics will increase, which will stimulate investment in recycling technologies and accelerate the development of recyclable products. Similar measures should now be applied to other sectors using plastics – including construction **and automotive** – as part of a broader policy and regulatory framework that drives demand for circular raw materials and ensures a positive climate for investment and innovation in Europe.

Work on the global agreement on plastic pollution (Global Plastics Treaty) has had two subsequent installments over the past 12 months – the INC3 meeting in November 2023 in Nairobi and the INC-4 meeting in April 2024 in Ottawa. Negotiations have now reached a critical point and the industry believes that if we want to get there on time, it is essential that all parties (governments, industry and society) redouble their efforts to find implementable consensuses. The next round (INC5 in Busan, South Korea in November 2024) will be preceded by intersessional work, which, in order to maintain the transparency and technical integrity of the draft agreement, should also include entities that currently have observer status.

The main challenge, especially for emerging economies, is how to provide **the necessary financing**. Extended Producer Responsibility systems are of fundamental importance here, as they are one of the tools for managing the final stage of the life cycle of plastic products

A sustainable approach to the use of plastics around the world is one of the most effective ways to eliminate plastic pollution, so the industry is concerned about the lack of progress in creating the policies and regulatory frameworks needed to accelerate the development of a circular plastics economy. Positive elements of the negotiations include the number of initiatives on how to identify and avoid problematic uses and those with a high risk of leakage into the environment. More work is urgently needed to detail these, and promising efforts include the criteria-based approach proposed by the European Union and the United Kingdom, as well as the associated ‚decision tree' **developed by the plastics industry**.

According to the estimates presented in ***The Plastics Transition*** roadmap, the reduction in greenhouse gas emissions as a result of switching to circular raw materials and avoiding incineration by 2050 will amount to 55% (129 million tons of CO_2).

Pellet loss prevention

The sustainable use of plastics and the prevention of environmental pollution with both plastic waste and microplastics, including pellets, is a priority of our industry and at the same time the subject of a number of legislative initiatives at the global, regional and national levels. Last year saw intensive work in Europe on **the proposal for a European Commission regulation on preventing plastic pellet losses to reduce microplastic pollution**. Plastics Europe and other industry associations have been actively monitoring the project from the beginning, preparing **joint position statements** and taking part in consultations and meetings with representatives of the European Parliament and Member State governments, ensuring that the proposed regulation is consistent with other legislative acts and providing effective measures to prevent loss of granules, while not negatively affecting the functioning of the plastics industry and related industries. The Environment Council is expected to adopt its position on the proposal by the end of December 2024, and trilogue negotiations will begin in early 2025.

The European Commission's proposal is based on **the Operation Clean Sweep®** program supporting companies from the entire plastics value chain in the fight against pellet losses. Promoted across Europe by Plastics Europe, the program includes a set of risk mapping recommendations and best practices, and **provides tools** such as a handbook, checklists, infographics, posters and more to help companies assess the protection measures they already have in place and develop more effective procedures to prevent pellets from entering the environment. The latest evaluation tool is the **OCS Europe certification scheme**, which, thanks to harmonized processes and procedures, enables controlling and documenting companies' compliance with program requirements (independent audit).

The PlasticsEurope Polska Foundation, working with industry organizations and certification bodies, actively promotes the OCS Europe program and certification scheme, including organizing regular webinars and training for Polish companies dealing with plastic pellets.

Open dialogue throughout the value chain

Plastics Europe Polska regularly participates in the most important industry events and organizes its own platforms for information, education and discussion throughout the plastics value chain. During this year's PLASTPOL International Fair of Plastics and Rubber Conversion, we presented **our traditional summary of the industry's condition** based on official European and national statistics and Plastics Europe's own data. We also presented the roadmap *The Plastics Transition* and organized an exhibition with its key messages.

Once again, we co-organized the conference *Let's talk about good practices in waste management* during the POLECO International Environmental Protection Fair with the MTP Group and TOMRA and the Circular Economy and Recycling Cluster - National Key Cluster.

The Foundation was present again at Circular Week and Mazovia Circular Congress 2023 organized by the INNOWO Institute, gathering representatives of business, administration and non-governmental organizations

Polish Circular Forum 2024

around the challenges of the circular economy. The managing director of the Foundation took part in the meeting *On the road to sustainable packaging*, a debate on sustainable packaging and in the discussion panel *Ambitions of business in circular economy transformation - how entrepreneurs can contribute in circular economy future*.

For the third time, we organized the Polish Circular Forum with the Circular Economy and Recycling Cluster, which was attended by 230 experts and offered 4 one-to-one interviews, 21 round table discussions and a summary debate. **The circularity of the plastics system was on all agenda items**. In order to increase the attractiveness of the event and the involvement of participants, new elements have been added to the program, such as voting for the most interesting conclusions from table discussions, open places at the debate and a circularity knowledge quiz. The forum was held under the honorary patronage of the Ministry of Development and Technology, and the partners were the Marshal's Office of the Masovian Voivodeship in Warsaw, Basell Orlen Polyolefins, BASF Polska, Tomra, Wastes Service, the Eko-Pak Employers' Union and Gridaly. **Just like last year**, conclusions and recommendations from the event are **available on our website** and were promoted in the value chain, as well as representatives of the Ministry of Climate and Environment and the Ministry of Development and Technology.

During the 16th edition of the Plastics Industry Meeting, a meeting of the plastics industry, organized every year by the PlasticsEurope Polska Foundation and the Polish Association of Plastics Converters, experts from the entire value chain discussed the greatest challenges and the most desirable ways of developing the plastics industry in Poland and Europe. Over 120 people attended the meeting. The special guests were Virginia Janssens – managing director of Plastics Europe and Bernard Merkx – managing director of European Plastics Converters. The edition's partners were Basell Orlen Polyolefins, Dow Polska and SABIC Poland.

The plastics value chain is not just about our industry. That is why Plastics Europe Polska is also involved in activities aimed at consumers and in cooperation with non-governmental organizations. As part of long-term cooperation with UNEP-Grid Warsaw, during the Sustainable Industry Lab we presented a road map, participated in the premiere and extended edition of the **report on plastics**, and in the celebration of World Environment Day with the participation of the Ministry of Climate and Environment. The Polish branch also supports discussions with decision-makers at the European level by participating in the organization of Euractiv.pl debates. This year, the conversation focused on **how green regulations affect the Polish economy and its competitiveness**.

Sustainable Industry Lab 2024, UNEP/GRID-Warszawa

According to the estimates presented in ***The Plastics Transition*** roadmap, by 2050 43% of all plastics used by converters will come from recycling (including 24% from mechanical recycling and 19% from chemical recycling).

We educate and communicate

As part of our activities, we keep you informed about the most important initiatives of Plastics Europe Polska and the positions of Plastics Europe on key issues for the industry. Current information can be found on our LinkedIn (**@Plastics Europe Polska**) and X (**@PlasticsEuropeP**) channels, as well as **on the website**. Among the useful materials on the website, it is worth paying attention to the ”Knowledge Hub” tab, where all available reports, new data and official positions of our association are posted. The ***Media*** tab contains information about ongoing campaigns, summaries from conferences and organized events.

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In terms of educational activities, over the last year we have refreshed the campaign ”Plastics not for stove, stove not for plastics” aimed at the general public about the phenomenon of low emissions and the harmful effects of burning plastic waste in home furnaces. As part of the new version of the campaign, an animated spot ”Gala Piec Master”, a thematic crossword, a drawing ”Find the difference” and educational graphic materials were created for Polish municipalities. All materials are free and can be downloaded on **our website**. We promoted the campaign in cooperation with the Polska Press media group, and together with EKORUM we conducted a mailing campaign to local authorities, eco-educators, a campaign on YouTube and Facebook. The materials were developed to reach various target groups – both adults and young people, providing the potential to undertake educational activities with schools.

Educational program *Plastek and his Magic Box*

An important element of the Foundation's activities is building common knowledge and increasing awareness of materials and their role in the modern world. The "Plastek and his Magic Box" program for primary schools allows teachers to introduce the topic of sustainable use of plastics at the first stage of education. Due to the engaging formula – independent experimentation, participation in an art competition – the program is liked by children and appreciated by teachers.

The program has been supported by our member company Basell Orlen Polyolefins Sp. z o.o. from 2022 and in the 2024/2025 school year, Dow Polska Sp. Sp. z o.o. has also joined the Plastek community. Thanks to the financial support of both partners, subsequent Plastek educational sets will be available free of charge to primary schools throughout Poland.

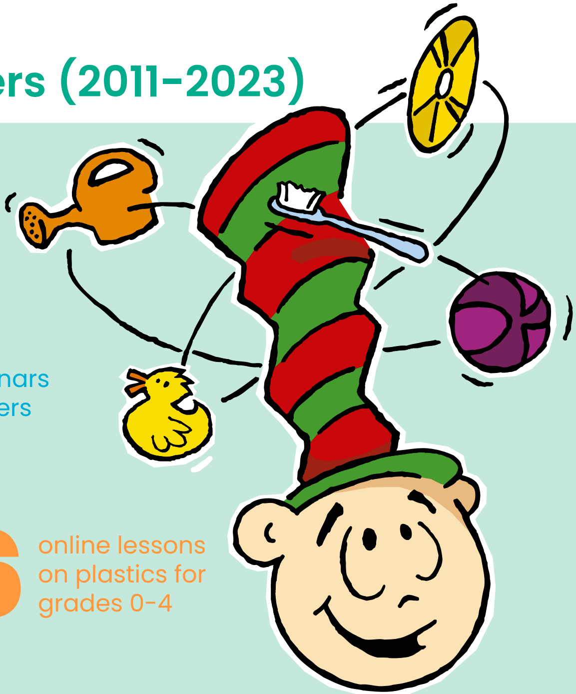
Plastek in numbers (2011-2023)

2,165 educational sets for schools

87 workshops and webinars on plastics for teachers

2,680 teachers participated in the project

6 online lessons on plastics for grades 0-4



26 editions of the art competition

6,600 students sent competition works

1,545 students received the main prize

About Plastics Europe Polska

Plastics Europe Polska, the foundation representing plastics producers in Poland, brings together national plastics producers, foreign concerns operating in Poland through locally registered enterprises, and others companies from the plastics industry operating on the Polish market.

ALBIS Polska Sp. z o.o.
Arkema Sp. z o.o.
Basell Orlen Polyolefins Sp. z o.o.
BASF Polska Sp. z o.o.
Borealis Polska Sp. z o.o.
Celanese Engineered Materials
Covestro Sp. z o.o.
Dow Polska Sp. z o.o.
Evonik Operations GmbH Sp. z o.o. Oddział w Polsce
Exxonmobil Poland Sp. z o.o.
Ineos Styrolution Poland Sp. z o.o.
SABIC Poland Sp. z o.o.
TotalEnergies Petrochemicals & Refining SA Oddział w Polsce
Trinseo Export GmbH Sp. z o.o. Przedstawicielstwo w Polsce
Versalis International SA Oddział w Polsce
VYNOVA Belgium NV

The Foundation’s authorities consist of the Foundation’s Management Board and Council, which include representatives of associated companies.

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