PLASTICS EUROPE
Enabling a sustainable future

Polish Plastics Industry in 2025

Plastics Europe Polska's Report

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Let's act together – decision-makers, business, society

Dear Readers!

Data, summaries, scenarios and comments... Never before have we needed it more than now, when times are tough, decisions are not easy and the future is challenging. So it is with optimism that, on behalf of Plastics Europe Polska, I place in your hands a wonderful tool – a report that meticulously, yet on a large scale, presents the latest data on our industry – an industry that influences the vast majority of economic sectors and affects their success. The analyses presented here allow us to better understand the mechanisms of our market and provide indispensable assistance in planning for the future.

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

Despite the undeniable challenges facing the Polish and European plastics market, I see clear seeds of optimism on the horizon and would like to share and elaborate on three concepts that will help shape our future. Here they are:

In nature nothing goes to waste. In nature, the concept of waste doesn’t exist: everything is in the process of transformation, materials that have served their function move on to the next phase and have another task to perform. This is very inspiring. Plastics have replaced “natural” materials because of their extremely useful qualities, such as durability and lightness, but most importantly, we have recognized their multi-phase nature and know how - imitating nature - to use plastics in a circular way.

The power of many. The second reflection concerns my utter awe towards humankind and its incredible achievements, despite each of us, individually, no matter how greatly we think of ourselves, has actually rather limited knowledge or abilities. For instance, we as individuals and in isolation, cannot do many of the things that happen around us on a daily basis, the average person cannot run a train or fly an airplane, let alone build them! Not alone. And yet, we as a collective society use (and make) trains and planes regularly, they are part of our normal life. We have processes and roles assigned to individuals, each one of us carries out a small step in the big scheme, and when you put it all together it works. Our real strength as humans is this collective capability, when working together.

A noble goal. Thirdly, progress is made possible by human creativity and collective action for the common good, wealth and abundance. And this “good” or even “prosperity” in the broadest sense is key here, because our ability to find solutions is triggered when we strive for something better, more valuable, greater. Our creativity knows no bounds when we have a vision of abundance in front of us.

Creative ideas, however, will not come to fruition if “someone” has to pay for it. Therefore, they must be embedded in the socio-economic realities and present the most optimal solution.

Let’s collectively create a globally competitive European plastics industry that mimics nature and wastes nothing. Let’s allow our collective creativity unfold with a promise of plenty. Let’s act together - decision makers, business, society. Let’s be agile so that we all can benefit from our common actions. This is our opportunity, let’s seize it as soon as possible!

Competitiveness and circularity must go hand in hand

"Over the past twelve months, for Poland exceptional due to its Presidency of the Council of the European Union, two issues have been at the forefront of industry discussions, including those led by the Plastics Europe Polska team – circularity and competitiveness.

As shown by data from last year's publication "Plastics – the fast Facts 2024", total plastics production in the European Union in 2023 saw a sharp decline of 8.3% compared to 2022, falling to 54 million tons. This decline was not due to a lower demand, but rather an increase in imports of cheaper raw materials from outside the EU, largely from regions with less strict environmental standards.

Anna Kozera-Szałkowska
Managing Director Plastics Europe Polska

However, globally, production increased by 3.4%. Europe’s share of the global market fell to 12%, down from 14% in the previous year and 22% in 2006.

This weakening competitiveness of the European economy simultaneously threatens the sustainable transformation of the plastics industry. In 2023, for the first time we recorded a decline in recycled content production from mechanical recycling – by 7.8%. Therefore, we need to regain the competitiveness of the European plastics industry to stay on track towards the ambitious goals set in our “Plastics Transition” roadmap.

Our industry’s commitment to this set direction remains unwavering, as you can see by delving into this year’s report, which outlines our main areas of activity from September 2024 to August 2025. You will find reflections of the industry’s ambitions and asks in the publications, statistics, position papers, and summaries referenced in the report. Additionally, the report provides valuable insights into the current condition of our industry, including an? analysis of market and waste data for Poland and key legislative aspects.

I am confident that by collaborating across the entire value chain, we will succeed in restoring the competitiveness of the European industry and building a sustainable plastics system that delivers even greater societal benefits. May this year’s report inspire us and bring us closer to this goal.

fot. Shutterstock_ Juice Flair

The condition of the plastics industry

The plastics industry is a significant component of the Polish economy, ranking third among industrial processing sectors (after food production and metal products) in terms of gross value added[1]. In Poland, this industry comprises (1) producers and suppliers of raw materials for processing (polymerization and compounding, importers, and wholesalers), (2) plastics converters (manufacturers of plastic products), (3) suppliers of machinery, tools and technological solutions for converters, and (4) recyclers. All mass-produced plastics, known as commodities, are produced in Poland, including PE, PP, PET, PVC, and PS, as well as some engineering plastics (polyamides, polyester and epoxy resins, and polyols).

The plastics industry in Poland comprises over 8,500 companies employing 220,000 people. The vast majority is in the plastics processing industry – almost 90% of companies in the entire sector, employing 193,000 people. According to Eurostat, in 2022 the turnover of the entire sector exceeded €34 billion, where the turnover of manufacturers of plastic products reached €28.3 billion. In 2023, this value fell to €27 billion.

ECONOMIC INDICATORS EU27

-1%
Plastics Production
2024

-4%
Plastics PRICES
2024

30.7 bn €
Plastics EXPORT
2024

23.9 bn €
Plastics IMPORT
2024

1. Data for 2023, Statistical Yearbook of Industry – Poland 2024
https://stat.gov.pl/obszary-tematyczne/roczniki-statystyczne/roczniki-statystyczne/rocznik-statystyczny-przemyslu-2024,5,18.html

Between 2022 and 2024 the whole European plastics sector experienced significant difficulties. Production declined in subsequent years, particularly in 2022 and 2023 (-9.9% and -9.3%), but the rate of decline slowed significantly in 2024 (-1%). Plastics prices were highly volatile. After a significant increase in 2022 (+23.7%), subsequent years saw sharp declines (-10.8% in 2023 and -4% in 2024), which may be a result of the market adapting to falling demand and changes in raw material and energy costs. Similar fluctuations occurred in trade values. The value of exports outside the EU improved slightly in 2024 (€30.7 billion), as compared to 2023, while imports decreased, reaching €23.9 billion. As a result, the trade balance for plastics in 2024 amounted to €6.9 billion.

ECONOMIC INDICATORS FOR THE EU-27, PLASTICS IN PRIMARY FORM

	2022	2023	2024
Production*	-9.9	-9.3	-1
Prices*	23.7	-10.8	-4
Export extra EU27 (in million tonnes)	13.3	11.9	13.1
Import extra EU27(in million tonnes)	13.7	12.7	13.3
Trade balance (in million tonnes)	-0.4	-0.8	-0.2
Export extra EU27 (in billion €)	37.4	30.4	30.7
Import extra EU27 (in billion €)	31.8	24.1	23.9
Trade balance (in billion €)	5.6	6.3	6.9

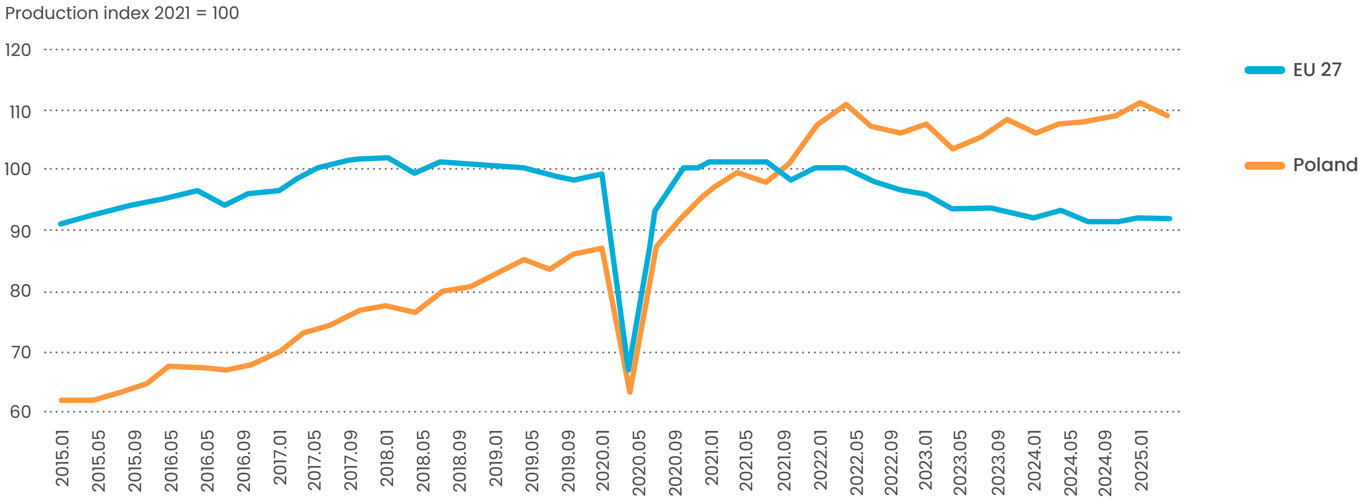
* change in % compared to the previous year

Source: Own study based on EUROSTAT data

The Polish plastics industry compared to Europe

Although the plastics sector in Poland had maintained good growth dynamics for years, but it experienced a stagnation phase in 2022. The main reasons are geopolitical tensions and the energy crisis, which limited production and reduced demand for plastic products. However, since the second quarter of 2023, we have observed a slow increase in production, which by early 2025 had already reached a level comparable to 2022.

MONTHLY SALES DYNAMICS OF PLASTIC AND RUBBER PRODUCTS 2015–2025

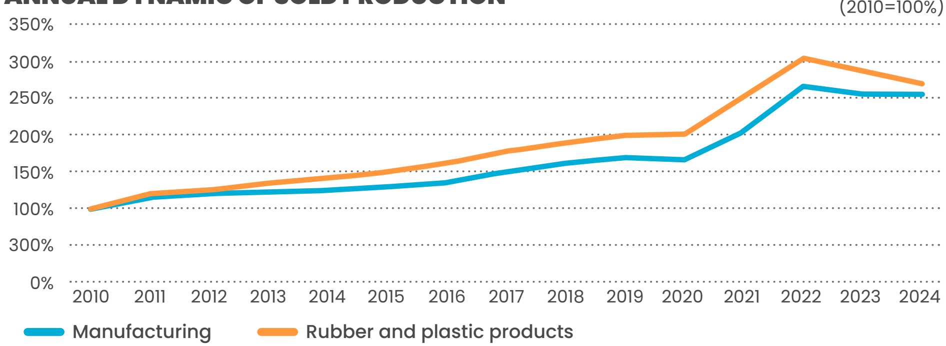


Source: Own study based on EUROSTAT data

Monthly sales dynamics in 2024 compared to 2023 were characterized by numerous fluctuations, but ultimately, total plastics production was lower in 2024, slightly above the overall industrial production level, which remained at a similar level to 2023.

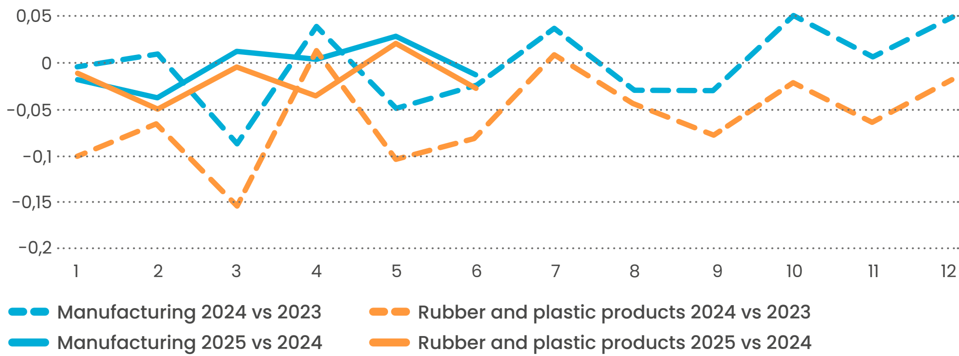
Monthly sales dynamics at the beginning of 2025 showed smaller variations, but still indicate significant market uncertainty, with no clear signs of recovery in either the rubber and plastics products sector or the entire industrial manufacturing sector.

ANNUAL DYNAMIC OF SOLD PRODUCTION



Source: Own study based on GUS (Statistics Poland) data

MONTHLY SALES DYNAMIC 2023, 2024, 2025



Source: Own study based on GUS (Statistics Poland) data

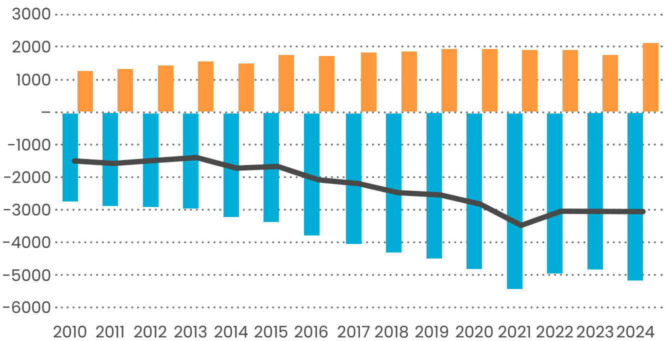
Maciej Dobrzyński
Covestro

At the beginning of the journey to regain the competitiveness of the European plastics industry, greater socio-economic awareness is needed about how significantly its condition impacts the strength and autonomy of other critical sectors, such as transport, renewable energy, and advanced medical solutions.

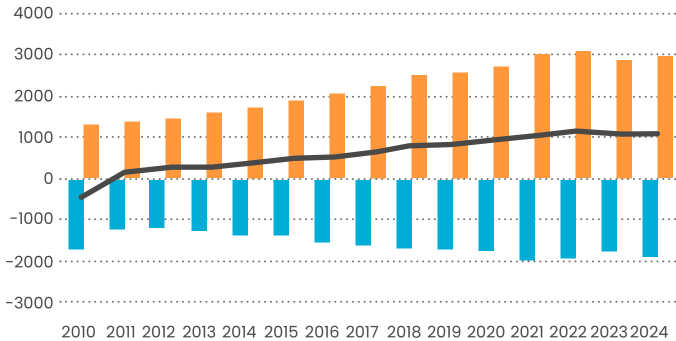
Foreign Trade

For years, Poland has remained a net importer of primary plastics and a net exporter of plastic products.. The vast majority of foreign trade (over 80% for polymers, over 70% for plastic products) is conducted with partners from the European Union, with Germany remaining the main import and export partner in both product groups (polymers and products), with a share of over 30% in each. The largest non-EU partners include Ukraine, South Korea, the United Kingdom, and China.

FOREIGN TRADE BALANCE
PLASTICS IN PRIMARY FORMS
(thousand tonnes)



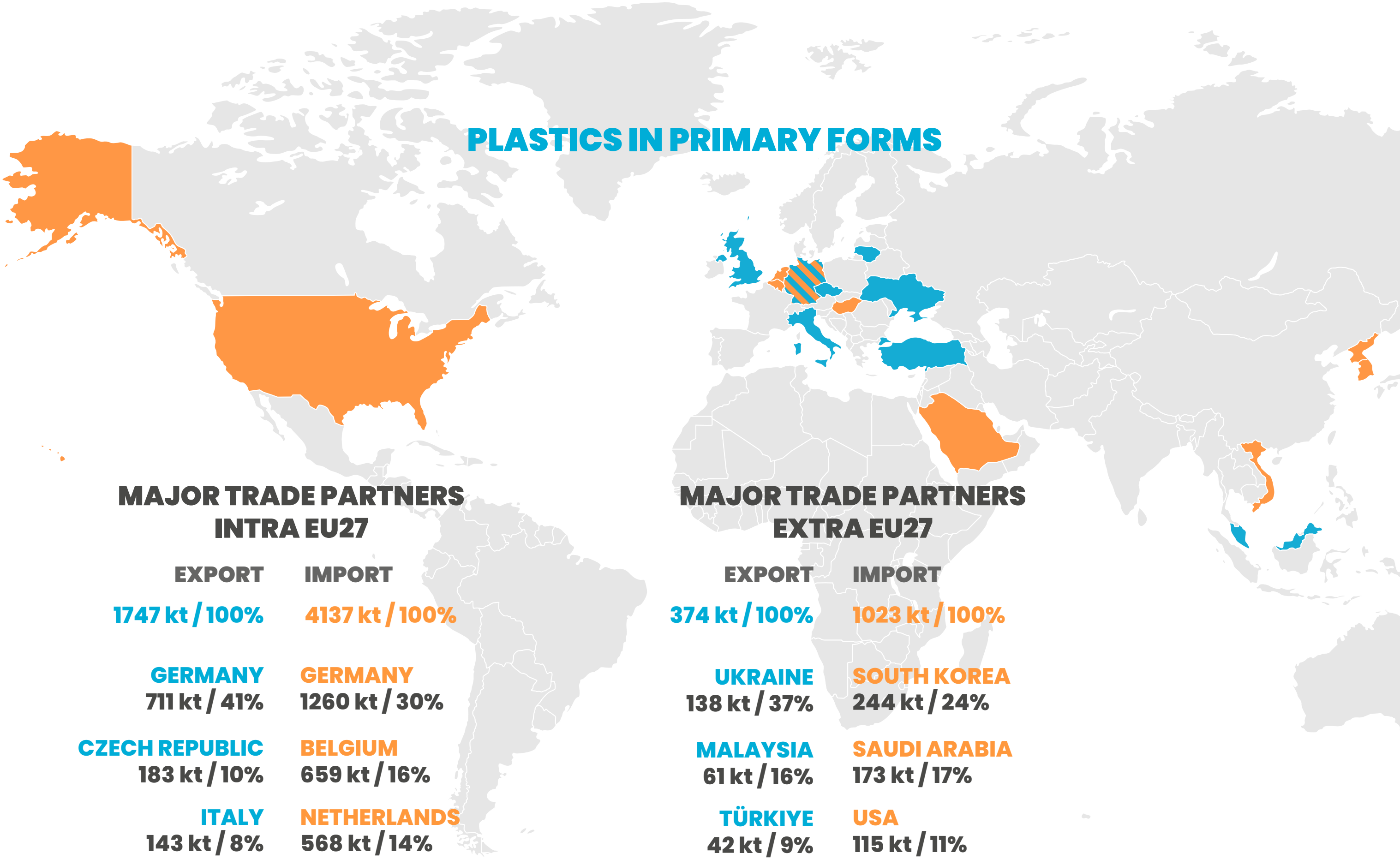
FOREIGN TRADE BALANCE
PLASTICS PRODUCTS
(thousand tonnes)



Import Export Balance

Source: EUROSTAT

PLASTICS IN PRIMARY FORMS



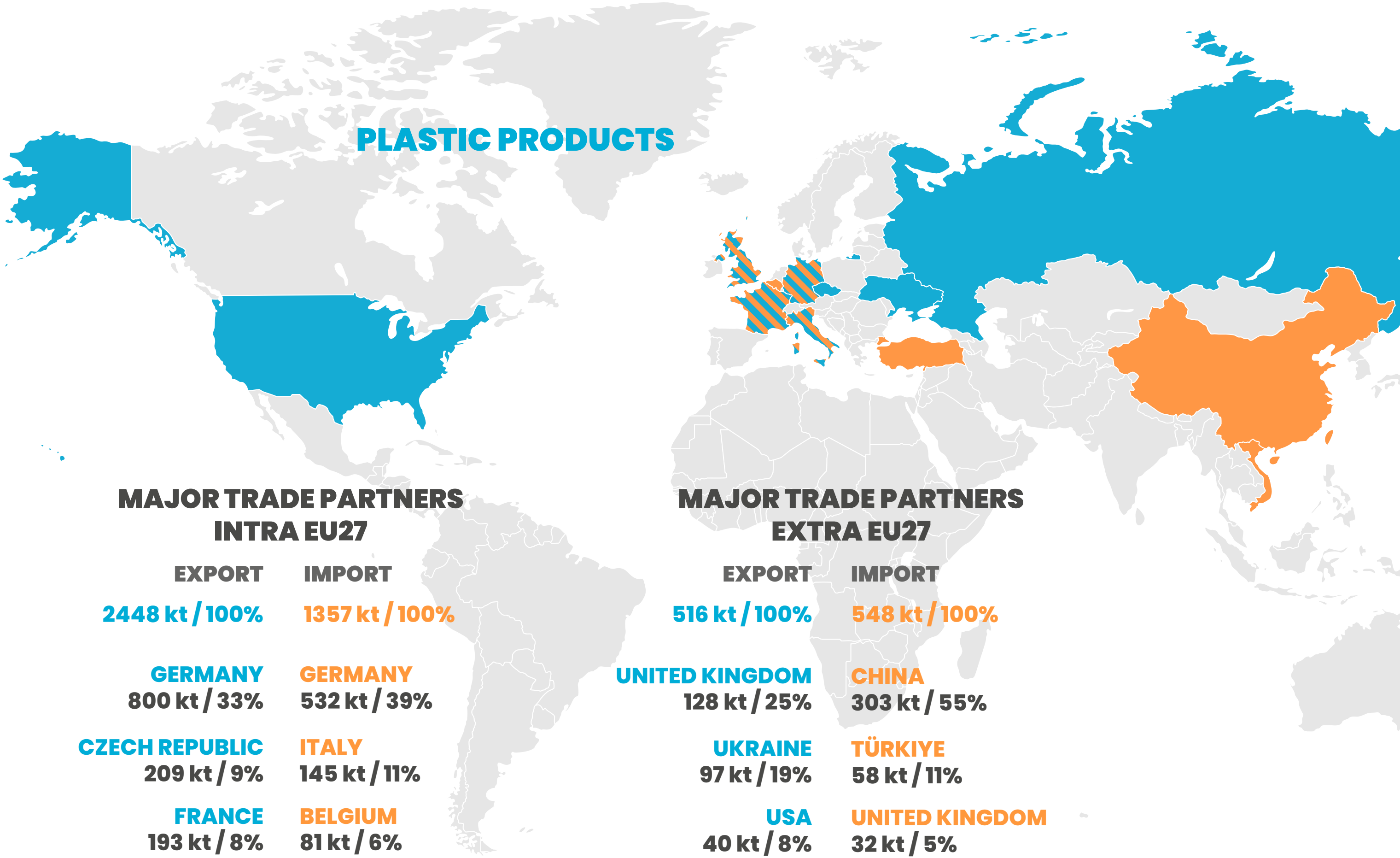
MAJOR TRADE PARTNERS INTRA EU27

EXPORT	IMPORT
1747 kt / 100%	4137 kt / 100%
GERMANY 711 kt / 41%	GERMANY 1260 kt / 30%
CZECH REPUBLIC 183 kt / 10%	BELGIUM 659 kt / 16%
ITALY 143 kt / 8%	NETHERLANDS 568 kt / 14%
LITHUANIA 107 kt / 6%	HUNGRY 260 kt / 6%

MAJOR TRADE PARTNERS EXTRA EU27

EXPORT	IMPORT
374 kt / 100%	1023 kt / 100%
UKRAINE 138 kt / 37%	SOUTH KOREA 244 kt / 24%
MALAYSIA 61 kt / 16%	SAUDI ARABIA 173 kt / 17%
TÜRKIYE 42 kt / 9%	USA 115 kt / 11%
UNITED KINGDOM 32 kt / 9%	VIETNAM 106 kt / 10%

PLASTIC PRODUCTS



MAJOR TRADE PARTNERS INTRA EU27

EXPORT	IMPORT
2448 kt / 100%	1357 kt / 100%
GERMANY 800 kt / 33%	GERMANY 532 kt / 39%
CZECH REPUBLIC 209 kt / 9%	ITALY 145 kt / 11%
FRANCE 193 kt / 8%	BELGIUM 81 kt / 6%
ITALY 183 kt / 7%	FRANCE 80 kt / 6%

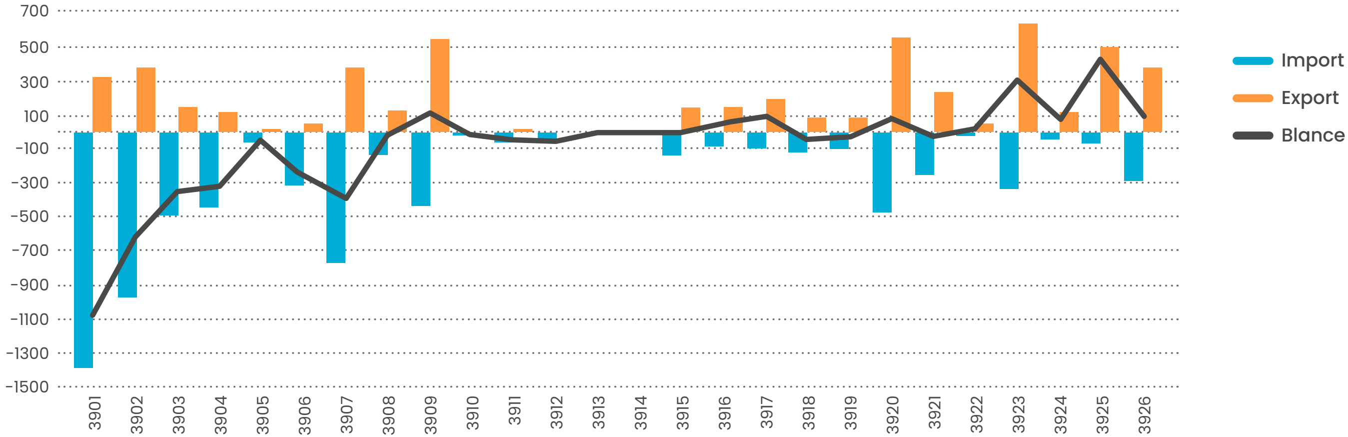
MAJOR TRADE PARTNERS EXTRA EU27

EXPORT	IMPORT
516 kt / 100%	548 kt / 100%
UNITED KINGDOM 128 kt / 25%	CHINA 303 kt / 55%
UKRAINE 97 kt / 19%	TÜRKIYE 58 kt / 11%
USA 40 kt / 8%	UNITED KINGDOM 32 kt / 5%
RUSSIA 26 kt / 5%	VIETNAM 30 kt / 5%

The analysis of Poland's foreign trade, divided into subgroups according to **the 4-digit HS classification**, shows that the largest quantities of imported products were ethylene polymers in primary forms (3901), propylene or other olefin polymers in primary forms (3902), polyacetals, other polyethers and epoxy resins in primary forms; polycarbonates, alkyd resins, polyallyl esters and other polyesters in primary forms (3907).

Among plastic products, the highest export values in 2024 were achieved by products for the transport or packaging of goods (3923), plates, sheets and foils (3920), and tableware, kitchenware, and other household and toiletry articles (3925).

FOREIGN TRADE BALANCE BY SUBGROUPS ACCORDING TO THE 4-DIGIT HS CODE IN THOUSAND TONNES (2024)



Source: Own study based on GUS (Statistics Poland) data

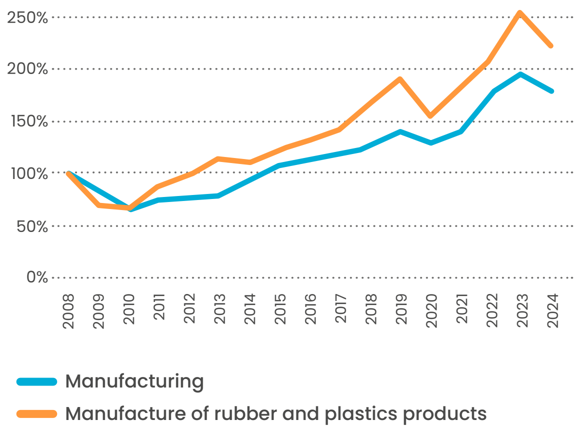
Investments in the Polish plastics industry

Capital expenditures in the plastics and rubber products production sector have been growing at a rate similar to that of the entire manufacturing industry for over 15 years. After a decline in 2020, the plastics industry saw an increase in investment over the next three years. In 2023, expenditures amounted to PLN 7.36 billion, more than twice as high as in 2013 (PLN 3.28 billion).

However, 2024 saw the first decline in capital expenditures since the pandemic, both in the industry as a whole (a 7.5% decline) and in the production of rubber and plastic products (a 12% decline compared to 2023). This may be due to the weak situation in related industries – the main consumers of plastics (automotive, electrical and electronics, construction).

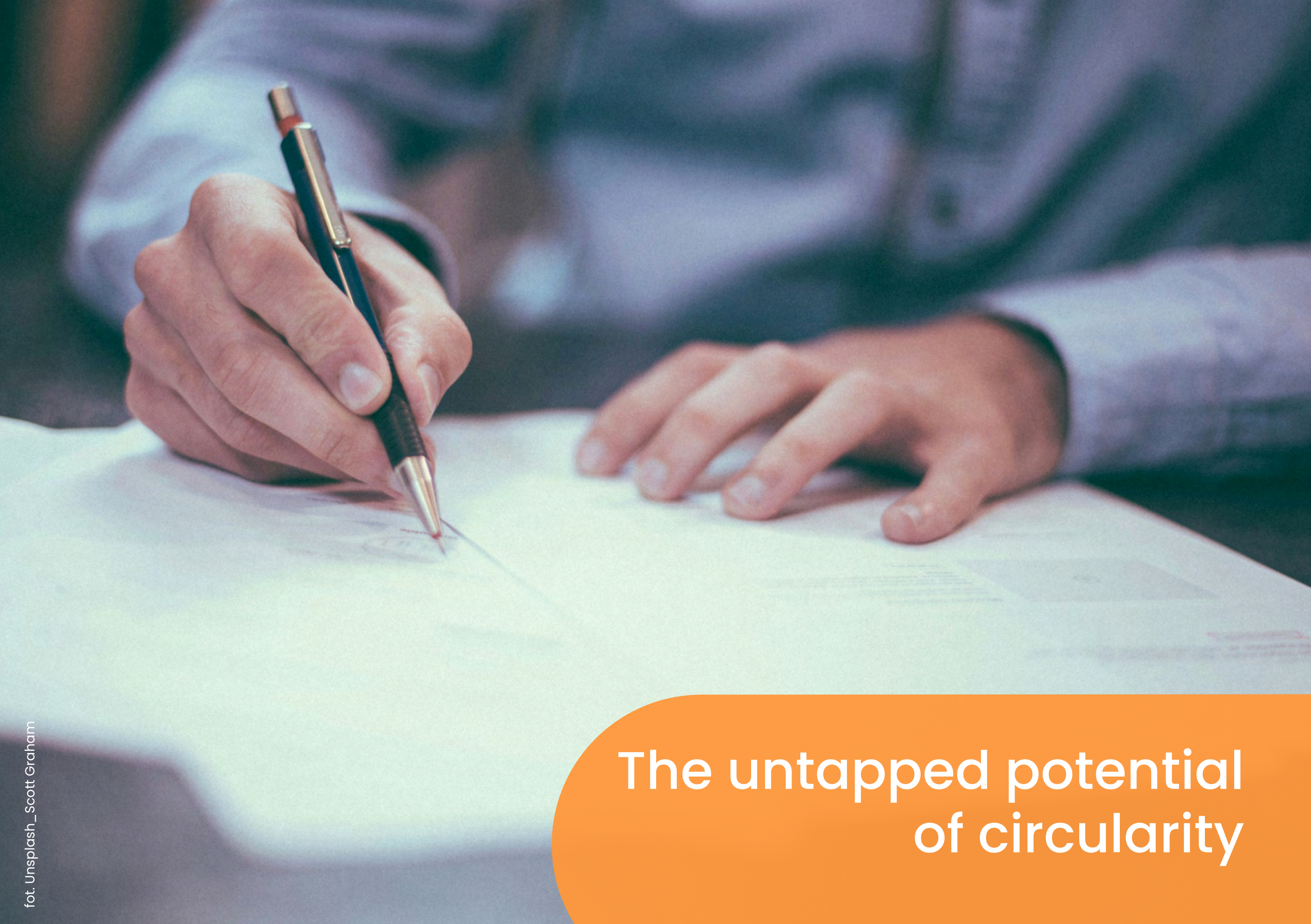
Available data from the Polish statistical office GUS (Statistics Poland) for 2025 indicates continued/further demand volatility and investment uncertainty. The first quarter of 2025 saw a 26% increase in new industrial orders, compared to the same period last year, but however the second quarter saw a 6.4% decline[2].

INVESTMENTS IN THE PLASTICS INDUSTRY IN THE CONTEXT OF THE ENTIRE MANUFACTURING (2008–2024) 2008=100%



Source: Own study based on GUS (Statistics Poland) data

2. https://bdm.stat.gov.pl/, GUS



fot. Unsplash_Scott Graham

The untapped potential of circularity

The competitiveness of the European economy remained a top priority for the new EU authorities. The revision of the EU's competitiveness and decarbonisation agenda, expressed e.g. in the new Clean Industrial Deal, identifies a number of very important and much-needed measures to ensure Europe's strategic autonomy and its sustainable future. The industry welcomes initiatives to reduce energy costs, cut red tape, and create the market demand necessary to stimulate circular investment. However, it is important to draw attention to the lack of sufficient emphasis on the urgency of taking action and the overlook of the essential contribution that plastics make to the EU economy, including in strategic EU sectors such as automotive, zero-carbon technologies, health, buildings and defence, and the role they play in the transformation of these industries. This criticality, size and complexity of the European plastics system requires targeted solutions. In addition, appreciating the declarations of promoting the common market, the industry emphasises the need to protect it in the face of its ongoing fragmentation. This is what the industry has been calling for at both EU and national forums, including during events organised as part of Poland's presidency of the EU in the first half of 2025.

The most important European legislative issues, monitored and commented on by the Foundation recently include PPWR, the draft ELV Regulation, the draft proposal for the regulation on preventing plastic pellet losses to reduce microplastic pollution, the Implementing Act for the SUP Directive and the Global Plastics Treaty negotiations.

Piotr Kwiecień
SABIC Poland

> EU policy frameworks aimed at restoring Europe's competitiveness should focus on simplifying procedures and reducing bureaucracy – particularly in areas such as issuing permits for low-emission and circular industrial installations, ensuring material neutrality, and providing legal clarity for innovative recycling technologies.

The Packaging and Packaging Waste Regulation (PPWR) has become a reality – **published in January this year**, it came into effect on February 11, and the first regulations will come into force 18 months later, i.e. in the second half of 2026. This is one of the most discussed documents in the previous EU legislative cycle, in which several key issues for the plastics industry will only be resolved in the implementation phase. In the coming years, the European Commission will publish around 40 pieces of legislation, including on methodologies for calculating and verifying the recycled content of plastic packaging, 'design for recycling' criteria and exemptions from reuse targets for certain transport packaging formats. Work on the latter aspect has been included among the first grade priorities – the decision on the ***Packaging and packaging waste – exemptions from the reuse obligation for plastic packaging and tapes (delegated act)*** was published in March this year and the resultsare expected later this year.

Work on the draft regulation on the ELV, which has been underway since 2023, has not been finalized during the Polish presidency. Our industry, involved in the process of creating this piece of legislation from the very beginning, pointed out in its position paper of November 2024 i.a. the need to establish ambitious regulations that can lead to better eco-design of cars, more sustainable management of car waste and increased use of recycled materials. Among other things, we called for a 20% recyclate content target in the ELV regulation, with an additional 5% circular plastics (including bioplastics), to increase the circularity of plastics used in the industry. It would also help ensure that plastics used in the automotive industry are properly collected, reused and recycled. The proposal of 20% recyclate content in new vehicles, which is being discussed at the current stage of the legislative process, unfortunately does not take into account bioplastics, which, according to our industry, is not a beneficial solution. The forward-looking target must include plastics from sustainable sources, such as bio-based raw materials. At the same time, to prioritise recycling, we recommend reducing the share of bioplastics and plastics from carbon capture and use technologies to no more than 5% of the overall target. **This is a balanced approach that we hope will be reflected in the final legislation.**

The expected breakthrough in the work on the Global Plastics Treaty has not occurred. The INC5 negotiation meeting in South Korea in November 2024 ended in a fiasco – the content of the agreement could not be agreed upon – and the closure of the negotiations was postponed to August 2025. The industry provides arguments and data on an ongoing basis to best understand the essence of the problem and to best construct a legal environment that will enable the implementation of such a circular and zero-emission economy so that the growing problem of plastic waste pollution in the world can actually be stopped. In recent dialogue with the legislator, in particular, we have stressed that the negotiations on the Global Agreement provide an opportunity for the EU to promote its approach to the circular economy as a global benchmark, while ensuring that the measures adopted do not harm the competitiveness of European producers. In order to create an effective International Legally Binding Instrument to End Plastic Pollution (ILBI-PP), it is essential to involve all key global players and regions, including the world's major plastics-producing countries. The absence of these countries would significantly undermine the effectiveness of any agreement, weaken its global reach, and reduce its potential impact on tackling plastic pollution. Given the changing geopolitical landscape, the EU needs to adopt a strategy that allows consensus among all UN member states, balancing the parties to reach an inclusive agreement providing flexibility to establish and implement effective circular legislation through national action plans. Building an enabling environment in the EU is key to supporting local plastics producers and companies in the value chain, ensuring that they are not disproportionately affected by gaps or inconsistencies in global politics. Plastics Europe sees this agreement as an important opportunity to scale up the effective technological solutions and good management practices developed in Europe, which will accelerate the process of creating a global circular plastics economy system.

The INC-5.2 negotiation meeting, which took place in Geneva on August 5-14 this year, did not lead to the establishment of the text of the agreement. As Plastics Europe, we have received this outcome with disappointment. At the same time, we value the continued efforts of the Chair and the UN Member States' negotiating teams, welcoming the decision to pursue further discussions and the expressed commitment to build the much-needed global consensus and an enabling policy framework.

However, the legislative process for the **regulation on preventing plastic pellet losses to reduce microplastic pollution is nearing completion** – the publication of the document is expected at the end of this year [more on pages 31 and 32].

10.3%

share of plastics in separately collected waste

At the level of European legislation, the Foundation' area of interest include the following legal acts:

- The Construction Products Regulation;
- The Energy Performance of Buildings Directive;
- The Eco-design for Sustainable Products Regulation;
- The Waste Framework Directive.

In the ongoing dialogue with legislators, the management of plastic waste in Poland plays a key role. For many years, the Foundation has been continuously monitoring the state of the plastics sector and plastic waste management in Poland, drawing on data from publicly available sources such as the Statistics Poland (GUS), official reports on waste generation and management, reports and analyses from other governmental agencies (including the Institute of Environmental Protection), independent experts, as well as press analyses.

According to data from the Statistics Poland (GUS)[3], 14.2 million tonnes of municipal waste were generated in Poland in 2024, representing a 5.3% increase compared to the previous year. This is a significant increase compared to 0.2% in 2023 vs 2022. The amount of waste per capita in 2024 increased from 357 kg to 377 kg.

3 https://bdl.stat.gov.pl/bdl/dane/podgrup/temat#

Mixed municipal waste accounted for the largest share of waste generated, reaching 8.2 million tonnes, representing 58% of the total. Of the waste generated and collected in 2024, 7.5 million tonnes (53%) underwent recovery processes, including:

- 3.1 million tonnes (22%) were thermally treated with energy recovery,
- 2.6 million tonnes (18.3%) were recycled,
- 1.8 million tonnes (13%) were biologically treated through composting or fermentation.

5.9 million tonnes of waste were separately collected, which is an 8.8% increase compared to the previous year (5.5 million tonnes). **Of this total, 612,000 tonnes were plastic waste (10.3%, which is a result comparable to 2023).**

The Foundation's primary focus remains on waste data derived from the BDO database, including that published by the Institute of Environmental Protection – National Research Institute (IOŚ-PIB)[4] on the management of municipal and packaging waste, which is based on reports submitted by provincial marshals. This is because the completeness and verifiability of the data collected in BDO are crucial for the calculations and methodology underlying the recycling rates reported by Poland for the purposes of determining the "plastic levy" amount. In mid-July of this year, the European Commission proposed an increase in the amount of this fee. However, according to the industry, this move is premature and will pose an additional threat to the sector's competitiveness.

4 https://ios.edu.pl/kategoria/raporty-i-analizy/odpady-pl/

In the national legislation, the Foundation monitored, analysed and formulated positions as part of the legislative work on the deposit system being created, renewed work on Extended Producer Responsibility and amendments to the Waste Act with regard to construction waste. In each case, issues such as the efficient collection of the various plastic waste streams and the need to effectively support recycling processes came to the fore. We have repeatedly pointed out that the deposit system, **which will formally come into force in Poland from October 1, 2025**, covers only a few percent of the plastic packaging stream and should complement the well-functioning – and importantly neutral towards all materials – Extended Producer Responsibility (EPR) system. On the other hand, a well-designed EPR system requires a holistic approach, in which each participant understands and fulfils their role well to achieve specific environmental benefits in the form of increased waste recycling[6].

The amended **Waste Framework Directive (2018/851/EU) requires EU** Member States to ensure that EPR schemes incorporate fee modulation based on environmental criteria. Pursuant to Article 8a(4) of the Directive, fees paid by producers should be differentiated depending on the environmental impact of their products, taking into account factors such as durability, reparability, reusability, recyclability, and the presence of hazardous substances. The European Union has not introduced uniform principles, so Member States have considerable discretion in creating EPR schemes, including eco-modulation.

6 Sectoral EPR systems are one of the important tools indicated in the above-mentioned **Ecodesign for Sustainable Products Regulation**, which de facto defines the possibility of placing products on the EU market.

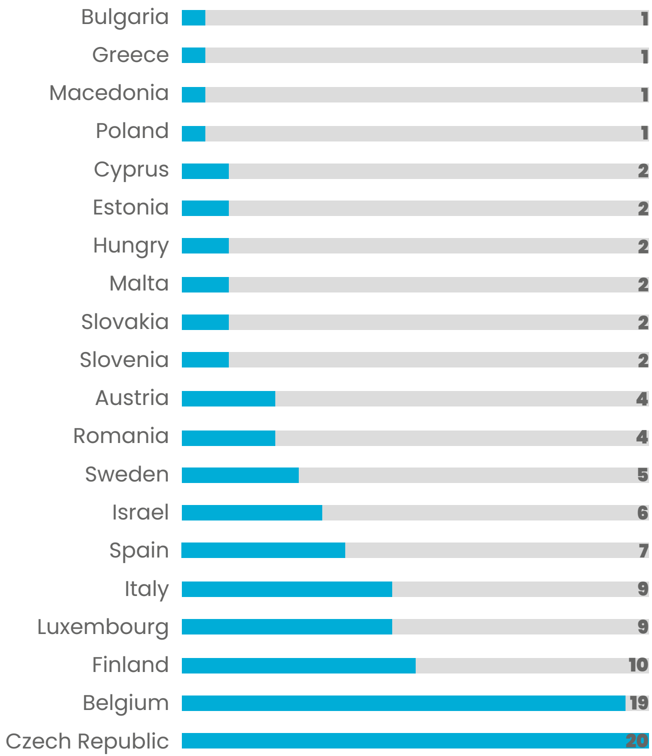
Eco-modulation should be based on a solid methodological foundation and take into account the actual environmental impact of products throughout their entire life cycle. The waste management phase is particularly important, but the adopted principles must not restrict the development of innovative solutions – both in terms of packaging formats and recycling technologies.

Depending on the complexity of the scheme, the number of tariffs varies – from 1-4 to as many as 20 product groups (see chart). In some countries (Germany, the Netherlands, and the UK), more complex integrated systems have been developed, in which rates for a given type of packaging are calculated based on multiple criteria.

The differentiation of fees depends on factors such as:

- the source of waste (consumer, transport, and wholesale packaging),
- the polymers from which the packaging is made,
- waste sortability,
- recyclate content,
- the share of packaging with a deposit-refund system,
- reusability.

NUMBER OF EPR FEE RATES FOR PLASTIC PACKAGING



Source: Own study based on PRO Europe data

When discussing the EPR system in Poland, it is important to maintain opportunities for the development and design of innovative plastic packaging. Therefore, it is advisable to create an integrated system for eco-modulation, which will take into account criteria related to recyclability, recycled content, and an assessment of the packaging's environmental impact.

In 2024, the Foundation also commented on current changes in waste law in Poland. In our position negatively referring to the elimination of the requirement for selective collection of construction waste, we pointed out that for a material such as plastic waste, selective collection at source is of key importance for the quality of the raw material to be recycled and, consequently, the profitability of the recycling process. However, the abolition of the requirement of selective collection of construction waste has finally been included in the amended regulations, so in the absence of systemic support for selective collection or sorting in our country, it does not seem that the level of recycling of waste from the construction sector, currently amounting to only 16%, will increase significantly[7]. Nearly 60% of this waste is still sent to landfills. Meanwhile, according to the new Directive on the energy efficiency of buildings, approved by the EU Council on 14 April this year, member states will be obliged to determine the so-called global warming potential over the entire life cycle of buildings (GWP) for new buildings, as well as to establish strategies to reduce it. According to the report **"Supporting the development of roadmap for the reduction of whole life carbon of buildings"**, prepared for the European Commission, the greatest potential for reducing the so-called embedded carbon footprint is shown by the area of production of building materials. This reduction can be achieved through the use of recyclable and recycled materials.

7 „Circular Economy for Plastics, Poland 2022"

Michał Łukawski
Dow Polska

"It is essential to introduce solutions that strengthen Europe's competitiveness – such as level playing field mechanisms, for instance monitoring and certification systems ensuring that imports comply with EU standards. At the same time, modernisation and better interconnection of the EU's energy grid are crucial, as well as securing access to affordable raw materials that are vital for the development of Europe's industrial base."

Pellet loss prevention

Unintentional losses of plastics pellets can occur at any stage of the supply chain: during production, transport, storage, and processing. According to the European Commission, they are the third largest source of unintentional microplastic leaks into the environment. Furthermore, incidents involving large pellet spills in recent years, including incident in Galicia (the coast of Spain), have highlighted the need for legislative solutions.

The industry supports binding, harmonized, and mandatory regulations for all participants in the plastics value chain to reduce pellet losses, consistent with the

OCS Europe
CERTIFIED FACILITY

European Union's target to reduce microplastics released into the environment by 30% by 2030. Therefore, it welcomed the proposed **regulation on preventing plastic pellet losses to reduce microplastic pollution**, which takes into account voluntary initiatives and industry actions, including those under the program **Operation Clean Sweep®**.

Plastics Europe was closely involved in the legislative process from the outset. Thanks to industry efforts (common positions and active participation in consultations and meetings with representatives of the European Parliament and member states), an agreement was reached on mandatory measures to prevent pellet losses. **The compromise text** incorporates and supports the industry's goals, incl. the OCS objective to prevent, contain and clean up pellet spills, certification, and recommendations for minimum mandatory equipment, while also representing an important step towards increased environmental protection. This pragmatic approach can serve as an example of a smart, pro-competitive policy, in which the new regulation is based on best practices, thereby minimizing additional regulatory burdens for the industry. Leaders who have already invested in pellet loss prevention measures in their installations and facilities and obtained **OCS Europe certification** are well prepared to meet the new regulatory requirements.

Plastics Europe Polska actively participates in pellet loss prevention by promoting the OCS Europe certification scheme, organizing regular webinars and training for Polish companies on obligations arising from the new legislation and the tools and best practices in reducing pellet losses.

Promoting the value of plastics

We highlight the value of plastics and their role in Europe's circular and competitive future at numerous industry events. We once again partnered with Circular Week and the European Sustainability Congress 2024, organised by the Innowo Institute. Plastics Europe Polska served on the jury of a student competition on business symbiosis, delivered a presentation on the facts and myths about plastics, and participated in an expert panel. During the Congress, we also organised a quiz on the circular economy, including the role of plastics.

fot. Targi Kielce

Plastpol Trade Fair 2025

Once again, together with the MTP Group and the Circular Economy and Recycling Cluster – Key National Cluster, we organised the conference "Let's talk about good practices in waste management" during The International Trade Fair for Environmental Protection POLECO 2024, where we presented data on the management of the end-of-life stage of plastics.

During the 30th International Fair of Plastics and Rubber Processing PLASTPOL, we presented a **summary of the industry's condition** based on official Polish and European statistics and Plastics Europe's own data, and also promoted the "Transition Campaign" and the OCS program.

We also actively participated in many other events, such as PlastInvent, the Recycling Forum and the GREENPACT European ESG Summit.

The 17th Plastics Industry Meeting, a gathering of the plastics industry, organised this year by Plastics Europe Polska and the Polish Union of Plastics Converters (PZPTS) in Kielce on the eve of the Plastpol Trade Fair, gathered experts from across the value chain, who discussed the competitiveness and circularity of the plastics industry in Poland and Europe. Competitive energy prices, support for circular solutions and material-neutral legislation were at the forefront of the industry's demands. Over 100 people attended the meeting. Partners for this edition included Basell Orlen Polyolefins, Dow Polska, Targi Kielce, and Bank Pekao S.A. **A summary of the event can be found on our website.**

We served as the event's Industry Partner for the fourth edition of the Polish Circular Forum. The Forum was held under the honorary patronage of the Ministry of Development and Technology and the Marshal of the Mazowieckie Voivodeship, as well as the patronage of the Polish Presidency of the EU Council. Representatives of Plastics Europe Polska led two roundtables dedicated to developing the circularity of the plastics system, and participated in a panel debate and a Circular Thinking session. This year the event was focused around the development of the industry input for an update of Polish Circular Economy Roadmap – the document from 2019, the revision of which is planned by the Ministry of Technology and Development.


Plastics Industry Meeting 2025

Martyna Matelska-Jucha
Borealis Polska

Without a competitive position of the European plastics industry on the global market, it will be difficult to achieve 65% circularity and net zero emissions by 2050, as set out in our industry's roadmap. This is why, as an ambitious sector committed to driving this transformation, we call for strong support of our efforts to guide the plastics economy through this transition.

Plastics Europe Polska actively promotes initiatives to end plastic waste pollution by 2040 by implementing a circular economy in which all plastics are responsibly managed throughout their production, use, and end-of-life stages.

In Poland we have a long-term collaboration with UNEP-Grid Warsaw and conduct such activities as press breakfasts for journalists on the negotiations for a global agreement on plastics, a workshop for stakeholders in the plastics value chain, partnership in celebrating World Environment Day.

World Environment Day 2025

© UNEP/GRID-Warszawa

Additionally, we've created a **section on our website** dedicated to the Global Plastics Treaty, where we explain, among other things, the role of the **circular economy in combating environmental pollution**. This system protects natural resources and reduces waste, while preserving these valuable materials and allowing us to continue benefiting from the value that plastics provide. Creating a legal framework that will enable the functioning and competitiveness of the circular economy is essential to achieving the goal of ending plastic pollution.

On the road to rebuilding the competitiveness of the European plastics industry

The debate "Competitiveness Compass: European Industry in the Global Race", organised by Euractiv.pl and held on 9 April 2025 at the EU Representation Office in Warsaw, brought together industry representatives and high-level decision-makers from Poland and the EU to discuss how the European Union can regain its competitive edge on global markets, including in the plastics sector. During the discussion, Plastics Europe Polska highlighted the strategic importance of the plastics industry for key sectors such as automotive and renewable energy, while also calling for stronger support: "Our industry is committed to achieving a circular economy by 2050 through circularity practices and lower-emission production. However, this transformation requires cooperation." The event was held under the patronage of the Polish Presidency of the Council of the European Union and with the support of the European Commission. **A full report from the event is available at euractiv.pl.**

Competitiveness Compass: European Industry in the Global Race

EUIndTech2025 is one of the EU's flagship conferences, organised as part of the Polish Presidency of the EU Council. As an event partner, Plastics Europe Polska organised the "Plastics Industry Solutions for Sustainable and Competitive Europe" site event and moderated the "Green Materials – Sustainable Choice for Competitive Europe" debate.

The conclusions from both sections focused on two key factors crucial to developing a circular and competitive future for European industry. The first was the industrial scale of innovation – experts agreed that to scale sustainable innovation, we must develop a supportive ecosystem. Clear and predictable regulations, which play a key role in achieving this goal, should not only actively support the development of this transformation, but also remove barriers along the way. The second factor was creating demand for circular and low-carbon innovations, which must be competitive.

Plastics Europe member companies were actively involved in the event – their representatives presented case studies of innovative solutions for the plastics industry and debated on how our sector contributes to the competitive and circular development of Europe.

EUIndTech 2025


EUIndTech 2025

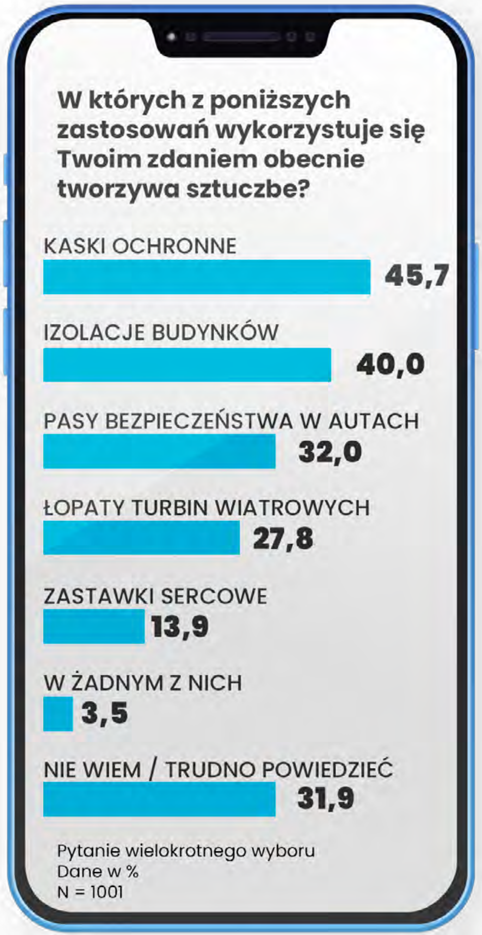
fot. SShutterstock_Dean Drobot

Communication campaigns

In 2025, we intensified our communication on the need to maintain the plastics industry's circular and zero-emission ambitions, as reflected in our "Transition Campaign". This campaign was accompanied by calls for the legislative and economic frameworks necessary to achieve these goals.

We also regularly inform on Plastics Europe Polska's most important initiatives and Plastics Europe's positions on key industry issues. Current information from our team can always be found on our LinkedIn channel **(@Plastics Europe Polska)**, **on our website**, or by **contacting us directly.** In addition to updating our regular sections, which provide valuable information, such as the **"Knowledge hub"** and **"Media,"** our website also features new materials, including those dedicated to the **role of plastics in the automotive industry.**

To promote awareness of plastics and their applications, we conducted a survey in collaboration with SW Research. Respondents were asked, among other things, about the applications for which plastics are currently used. Nearly one in three respondents couldn't identify the applications in which plastics are used. Over half failed to identify even seemingly obvious products like safety helmets. Only 8.6% of respondents identified all the correct applications (safety helmets, building insulation, seat belts, wind turbine blades, and heart valves). More information about the results, as well as the applications of plastics, can be found on the **natemat.pl website**.



SW Research Survey 2024

Educational campaigns

Plastek and his Magic Box

When we launched the “Plastek and his magic box” educational project in 2011, we wondered how our program would be received in primary schools. It turned out to be a bull’s-eye – the program perfectly integrated into early childhood education, supporting creative, engaging lessons and developing environmental awareness. Together with our supporting educational partner (Stowarzyszenie Cyfrowy Dialog) over the years we have collected **“teacher stories” in which they shared their experiences of participating in the project**. Teachers noted that participation in the project helps children experience the world of plastics from a positive perspective. The experiments completely captivate even the youngest students, sparking curiosity and a desire to learn. The art competition develops the imagination and creativity, and thanks to online lessons and supplementary materials, they learn that by sorting and recycling plastic waste, we give it a second life. Teachers also emphasized **the importance of teamwork** – a skill so much in demand today – which our program encourages, as well as **the role of the introductory training**, which provided them with the opportunity to expand their knowledge about plastics.

Between 2011 and 2021, we covered over 2,000 schools across Poland. The project was able to continue in 2022-2025 thanks to the ongoing support of Basell Orlen Polyolefins Sp. z o.o. and the contribution from Dow Polska Sp. z o.o. In total, we donated nearly 2,500 educational kits to schools, and over 7,150 students received prizes in the Plastek art contest.

Plastics Not for Stove, Stove Not for Plastics

In the latest edition of the "Plastics Not for Stove, Stove Not for Plastics" campaign, which explores the harmful effects of burning plastic waste in home furnaces and the value of plastic waste as a potential new resource, we collaborated with our partner EKORUM to create **publicly available lesson plans for schools** across three levels of education. Based on these, pilot lessons were conducted in schools in Poznań, involving a total of approximately 135 students. The materials were distributed to eco-educators and promoted in a Facebook campaign.

Jolanta Wojtal-Rak
BASF Polska

> The success of our transformation depends on clear political support for the competitiveness of the European plastics industry – including investments in circular plastics and the introduction of economic or financial measures, such as tax incentives, that will quickly ensure market recognition of circular materials.

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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