



**PLASTICS
EUROPE**

Enabling a sustainable future

Plastics industry 2026

Plastics Europe Polska's Report

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With confidence to a bold future



Dear Readers,

It has now been a year since I had the pleasure of joining Plastics Europe Polska, and it has been a highly engaging and insightful period—both from a market perspective and personally, as I have had the opportunity to be living and working in the beautiful country of Poland.

The European industry is currently operating under exceptionally challenging conditions, competing globally while facing comparatively higher feedstock, carbon-emission, and energy costs, alongside continued regulatory uncertainty regarding circular and low-carbon plastics. In recent months, this structural disadvantage has become increasingly apparent, as reduced import flows of base resins from outside Europe have underscored the region's considerable dependence on global supply sources.

The situation is challenging, however, plastics remain among the most widely used materials globally, owing to their adaptability



Jasper de Kruijf
President of Plastics Europe Polska
(Basell Orlen Polyolefins Sp. z o.o.)

and suitability for a broad range of essential applications. They play a critical role in healthcare, fresh-water infrastructure, automotive components, and packaging solutions that help preserve food quality and reduce waste. The plastics industry also represents a significant source of employment and economic value. A loss of Europe's capability to supply these strategically important sectors would therefore have substantial long-term consequences.

Europe has now the opportunity to differentiate itself by strengthening the recyclability of plastics and establishing a clear and coherent legislative framework. The region was previously regarded as a leader in end-of-life plastic-waste treatment, supported by initiatives in mechanical recycling, chemical recycling, and low-carbon solutions for both post-consumer and post-industrial plastic waste. However, Europe has since lost ground to other regions, largely due to persistent regulatory ambiguity in areas such as recycled content in food packaging, which continues to hinder investment decisions.

Robust decision-making in challenging market conditions requires reliable and comprehensive data. This report is intended to support that process by providing detailed insights into the plastics industry, enabling informed decisions in an increasingly complex operating environment.

As we look ahead with confidence to a bold future, we must also strengthen our industry's resilience by deepening cooperation across the entire value chain. This can be achieved by sharing knowledge and raising awareness of the value that plastics bring not only to businesses, but above all to end users and the environment.

Competitiveness crisis at the root of the challenges



The past year, shaped by US trade policy, was marked by geopolitical and macroeconomic uncertainty.

Nevertheless, the Polish economy – and the industrial sector in particular – demonstrated great resilience. With GDP growth double the European average, Poland ranks as the EU's sixth-largest economy and, in 2025, joined the ranks of global economic leaders for the first time in history.

However, was this optimistic picture reflected in the plastics industry? Unfortunately, it did not translate directly into production growth for the domestic plastics industry, which has long been grappling with fierce competition from outside Europe. The situation facing the Polish industry merely confirmed the serious competitiveness crisis gripping the European plastics sector.

Data from the report “Plastics – the fast Facts 2025” clearly demonstrated that, despite production remaining stable in 2024 (+0.4%, reaching 54.6 million tonnes) following a record decline in 2023 (–7.6%), Europe's share of the global market continues to shrink



Anna Kozera-Szałkowska
Plastics Europe Polska Managing Director

– falling from 22% in 2006 to just 12% in 2024. Industry turnover also dropped sharply, falling from €457 billion in 2022 to €398 billion in 2024 (–13%).

Equally alarming are the data regarding progress toward circularity. The key conclusion of the biennial report „Circular Economy for Plastics – A European Analysis“ is that, amidst rising global competition, Europe’s circular transformation has slowed significantly. The growth rate of circular production has declined, and plastics recycling is increasing very slowly – with the majority of collected plastic waste still ending up in landfills or being incinerated.

Moreover, trade data included in the report for the first time reveal a significant reliance on external value chains: 19% of converters’ demand for circular plastics was met through imports, while 12.4% of waste collected in Europe is recycled in other regions. Europe’s dependence on imported fossil-based plastics is even greater, accounting for 25% of converters’ demand.

Is there, then, still hope for European plastics? This report, outlining our key activities from September 2025 to August 2026, demonstrates that there is. Our industry’s strength lies in ever-deepening cooperation, unwavering commitment, and undiminished ambition. However, we need support to bridge the gap between climate ambitions and economic realities. I hope this will help further unlock and realize our potential.



Circular plastics production
reached

8.7Mt

but growth has **slowed**
significantly since 2022.

Condition of the plastics industry

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 added¹. In Poland, this industry comprises (1) producers and suppliers of raw materials for processing (polymerization and compounding, importers, and wholesalers), (2) plastics processors (product manufacturers) – the largest subsector, (3) suppliers of machinery and technological solutions for processors, and (4) recyclers. Poland produces basic polymers: polyolefins (HDPE, PP – Basell Orlen Polyolefins), LDPE (ORLEN S.A.), polyvinyl chloride (PVC – Anwil Grupa Orlen), polyethylene terephthalate (PET – Indorama), polystyrenes (PS – Synthos), as well as certain engineering plastics, such as polyamides, polyester and epoxy resins, and polyols (Grupa Azoty, Sarzyna Chemical, Lerg, PCC Rokita).

The plastics industry in Poland includes over 8,300 enterprises employing 201,400 employees. The vast majority is plastics processing – 94% of companies in the entire sector, employing 189,400 employees. According to Eurostat, in 2023, the turnover of the entire sector fell from €34 billion in 2022 to €31.4 billion, with the turnover of manufacturers of plastic products amounting to €27.1 billion (down from €28.3 billion in 2022).

¹ Data for 2024, Statistical Yearbook of Industry 2025

<https://stat.gov.pl/obszary-tematyczne/roczniki-statystyczne/roczniki-statystyczne/rocznik-statystyczny-przemyslu-2025,5,19.html>

Tworzywa – Fakty 2025 w pigułce

Światowa i europejska produkcja tworzyw sztucznych
oraz wybrane wskaźniki ekonomiczne



 **PLASTICS
EUROPE**
Enabling a sustainable future

Global declines in industrial production observed in recent years have also significantly affected the European plastics industry, as confirmed by the Plastics Europe Plastics – ***The Fast Facts 2025*** report. Although plastics production in Europe increased slightly in 2024 (+0.4% to 54.6 million tonnes), the region's share of the global market fell from 22% in 2006 to just 12% in 2024. At the same time, the industry's turnover fell by 13%, from €457 billion in 2022 to €398 billion in 2024. Meanwhile, global plastics production increased by 4.1% last year, and Asia is already responsible for more than 57% of global production. China alone produces 34.5% of the world's plastics, almost three times more than the entire European Union.

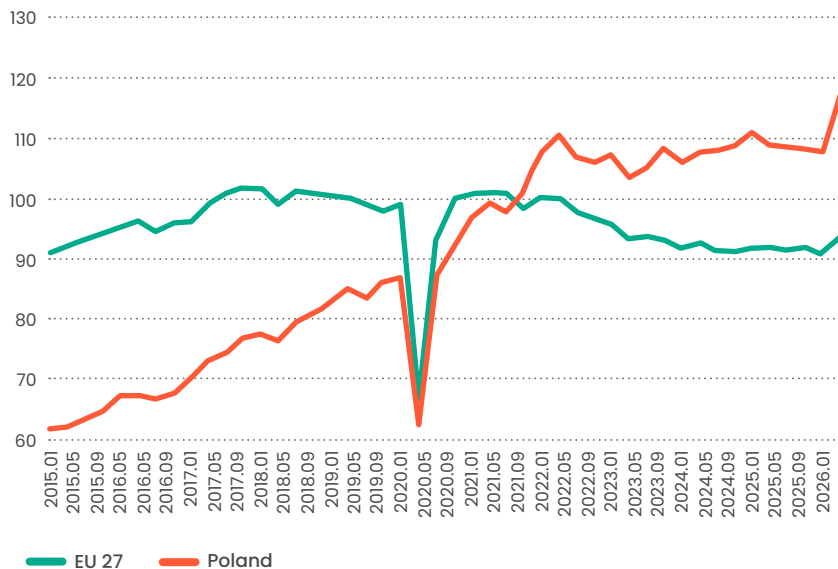
The situation in international trade remains an additional challenge for the European plastics sector. The negative trade balance of EU27 plastics in basic forms improved slightly – from -0.8 million tonnes in 2023 to -0.2 million tonnes in 2024 – driven by a 10% increase in exports. At the same time, the industry remains exposed to risks resulting from changing global trade conditions. Of particular importance are relations with the United States, which is the largest supplier of polymers to Europe, accounting for nearly 19% of EU imports, and at the same time one of the main recipients of European plastics.

The Polish plastics industry vs. Europe

After a marked slowdown in 2022 due to geopolitical tensions and the energy crisis, the plastics and rubber sector in Poland has gradually recovered its position. Since mid-2023, stable production growth has been observed, which in 2025 led to exceeding the levels recorded in the period preceding the slowdown. In 2026, this trend strengthened further, with production dynamics reaching the highest level since the beginning of the period under review. Compared with the European Union, where the sector remains largely stagnant, the Polish industry has shown greater resilience and the stronger ability to recover production.

MONTHLY SALES DYNAMICS OF PLASTIC AND RUBBER PRODUCTS, 2015–2026

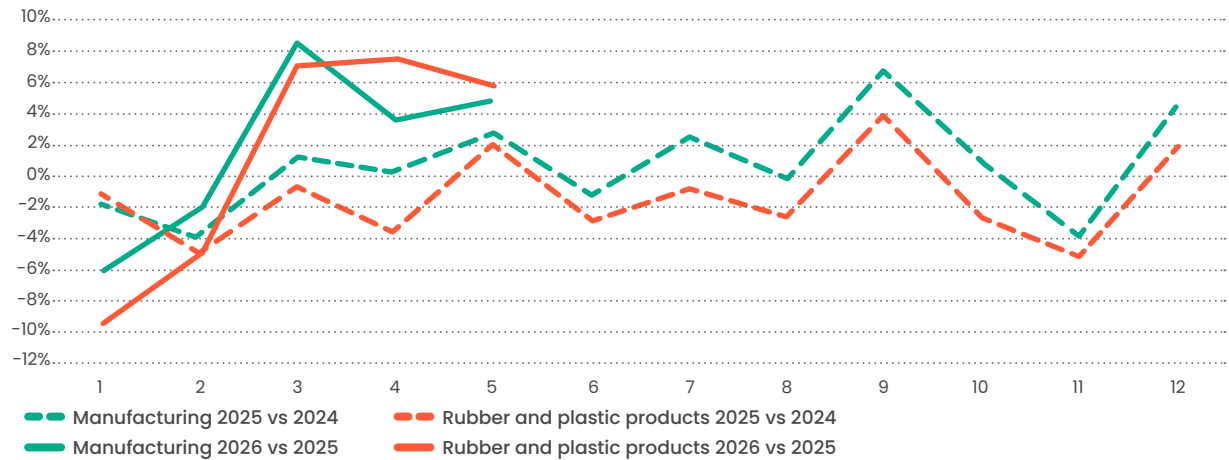
Production index 2021 = 100



Source: Own study based on Eurostat data

In 2025, both industrial processing and the rubber and plastics products sector in Poland maintained a high level of production despite a marked slowdown in the previous growth dynamics. Monthly data indicate that 2025 was characterized by a volatile economic situation, with periods of increases and decreases in sales compared to the previous year. However the first months of 2026 brought a clear recovery. The sales dynamics of rubber and plastic products were positive from March to May and reached levels higher than in the corresponding period of 2025, which may indicate a gradual improvement in the situation in the industry.

MONTHLY SALES DYNAMIC 2024, 2025 AND 2026

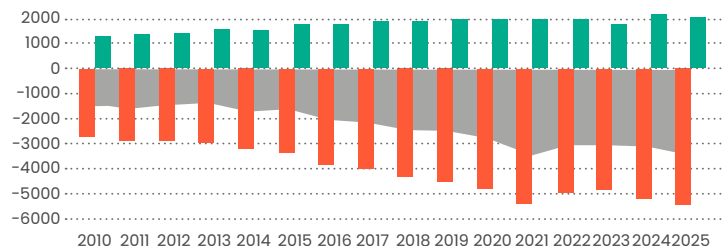


Source: Own study based on GUS data

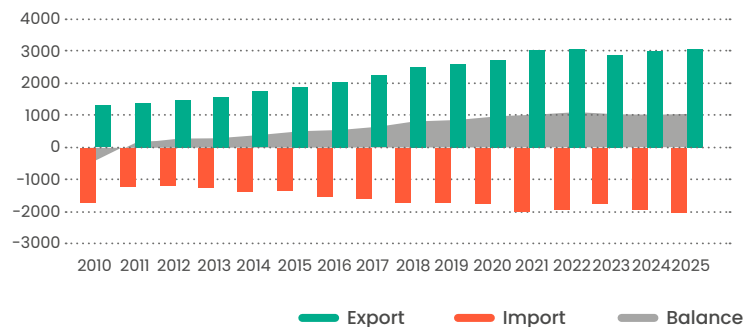
Foreign trade

For years, Poland has remained a net importer of primary plastics and a net exporter of plastic products. In 2025, an increase in imports and a decrease in exports were observed in the case of polymers. In the case of plastic products, both imports and exports remained at a level similar to 2024. Most of the turnover in foreign trade is carried out with partners from the European Union (over 78% in the case of both polymers and plastic products). Germany remains the main partner in imports and exports in both groups of goods (polymers and products) with a share of over 30% in each case. The largest non-EU partners include China, South Korea, Saudi Arabia and Ukraine.

FOREIGN TRADE BALANCE PLASTICS IN PRIMARY FORM (in kt)



FOREIGN TRADE BALANCE PLASTIC PRODUCTS (in kt)



Source: Own study based on Eurostat data

PLASTICS IN PRIMARY FORM

MAJOR TRADE PARTNERS INTRA EU27

EXPORT	IMPORT
1673 kt / 100%	4229 kt / 100%
GERMANY 654 kt / 39%	GERMANY 1390 kt / 33%
CZECHIA 192 kt / 11%	BELGIUM 6627 kt / 15%
ITALY 128 kt / 8%	NETHERLANDS 529 kt / 13%
LITHUANIA 112 kt / 7%	HUNGARY 269 kt / 6%

MAJOR TRADE PARTNERS EXTRA EU27

EXPORT	IMPORT
361 kt / 100%	1228 kt / 100%
UKRAINE 149 kt / 41%	SOUTH KOREA 319 kt / 26%
MALYSIA 67 kt / 19%	ARABIA 205 kt / 17%
SWITZERLAND 30 kt / 8%	UNITED STATES 125 kt / 10%
UNITED KINGDOM 28 kt / 8%	CHINA 108 kt / 9%

Source: EUROSTAT

PLASTIC PRODUCTS

MAJOR TRADE PARTNERS INTRA EU27

EXPORT	IMPORT
2588 kt / 100%	11417 kt / 100%
GERMANY 825 kt / 32%	GERMANY 547 kt / 39%
CZECHIA 221 kt / 9%	ITALY 140 kt / 10%
FRANCE 206 kt / 8%	NETHERLANDS 93 kt / 7%
NETHERLANDS 173 kt / 7%	FRANCE 84 kt / 6%

MAJOR TRADE PARTNERS EXTRA EU27

EXPORT	IMPORT
503 kt / 100%	597 kt / 100%
UNITED KINGDOM 129 kt / 26%	CHINA 338 kt / 57%
UKRAINE 102 kt / 20%	TÜRKIYE 65 kt / 11%
UNITES STATES 44 kt / 9%	WIELKA BRYTANIA 33 kt / 6%
TURCJA 24 kt / 5%	VIET NAM 33 kt / 5%

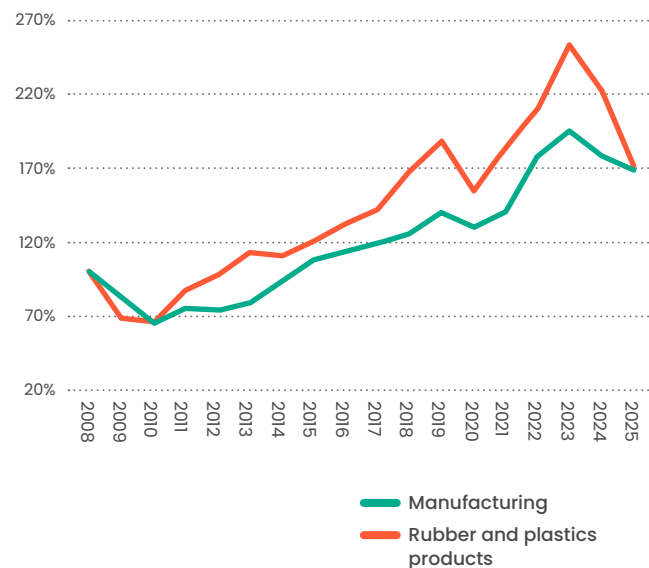
Source: EUROSTAT

Investments in the Polish plastics industry

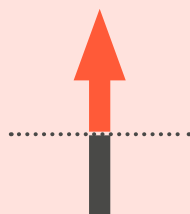
Following the decline in investment associated with the COVID-19 pandemic, both the rubber and plastics products manufacturing sector and the manufacturing industry as a whole remained on a growth trajectory between 2021 and 2023. Since 2024, however, a clear slowdown in investment activity had been observed. The rubber and plastics products sector saw two consecutive years of declines. Between 2024 and 2025, investment in the rubber and plastic products industry declined markedly, decreasing from around 255% to around 170% the of 2008 level. A similar trend was also recorded in the entire industrial processing, but the scale of the decline was much smaller.

Eurostat data for 2025 indicate that companies in Poland have become more cautious about undertaking new investment projects, which may be related to the continuing economic uncertainty and weaker economic conditions in industries that are the main recipients of plastic products, in particular in the E&E sector and construction.

INVESTMENTS IN THE MANUFACTURING AND PLASTICS INDUSTRY (2008–2025) 2008 = 100



Source: Own study based on GUS data



For the first time,
circular plastics content
in new products is

above 15%

reaching **7.9 Mt** in 2024.

Circular Economy for Plastics – A European Analysis 2026



The transformation of the European plastics system has to be based on reliable data. Therefore, one of the key projects in recent months was the launch of the latest edition of the biennial report “Circular Economy for Plastics – A European Analysis”.

The report presents the latest data (for 2024) and analyses regarding the circular transformation of plastics in Europe (covering the EU27, Norway, Switzerland, and the UK), including trends in the production, processing, use, and trade of circular plastics, as well as data on plastic waste management.

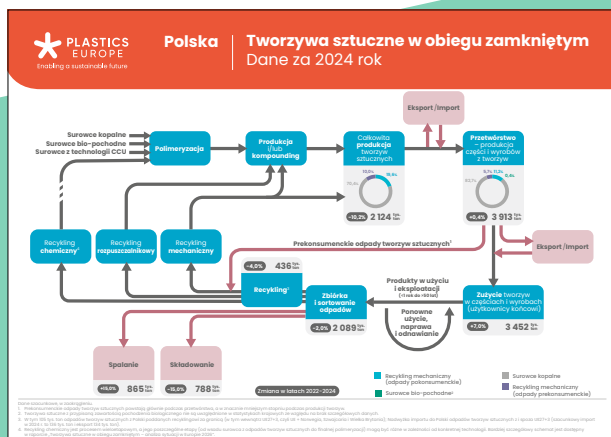
The report’s main conclusion is that Europe’s circular transition has slowed significantly amidst rising global competition. The compound annual growth rate (CAGR) for circular plastics production in Europe dropped sharply – from 13.6% in 2022 to just 1.2% in 2024 – resulting in a production volume of 8.7 million tonnes (representing 15.8% of total production). In contrast, the global rate rose from 5% to 7.7%. Interest in circular plastics among converters in Europe also declined in 2024, with the annual growth rate of demand falling from 16.2% to 4% over the two-year period.

Europe maintained the largest share of circular plastics (15.8%) relative to total plastics production. However, its leading position in this category is primarily the result of a sharp decline in European production of plastics from fossil-based feedstocks – an 8.3% drop between 2022 and 2024 (to 43.3 million tonnes in 2024).

Trade data included in the report for the first time also highlight the significant reliance of the European plastics conversion sector on external value chains: 19% of converters' demand for circular plastics was met through imports, while 12.4% of waste collected in Europe is recycled in other regions. Europe's dependence on imported fossil-based plastics is even greater, accounting for 25% of converters' demand.

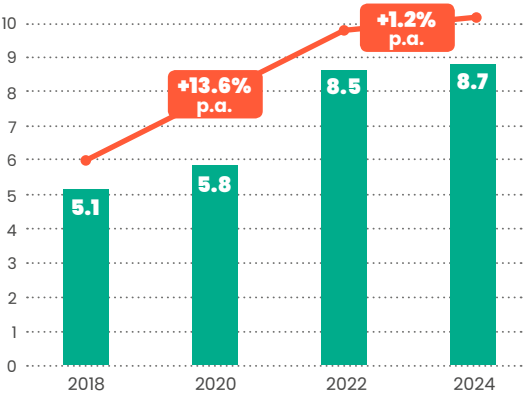
Although recycling rates rose to 29.6%, over 70% of collected European plastic waste – a valuable circular resource that could reduce Europe’s reliance on fossil-based resources – still ended up being incinerated (48.9%, 16 million tonnes) or sent to landfills (21.5%, 7 million tonnes).

As in previous editions, detailed infographics presenting data for eight European countries, including Poland, were published alongside the report.



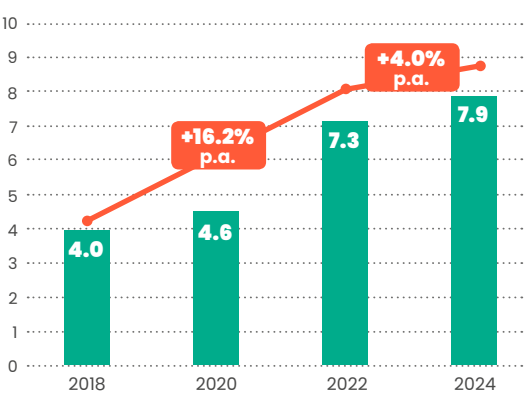
In 2024, 32.7 million tonnes of plastic waste were collected in Europe, of which 12.3 million tonnes were sorted for recycling, but only 8.5 million tonnes were actually recycled in the EU27+3, with 8.1 million tonnes of recyclates. In addition, 1.5 million tonnes of sorted waste were exported outside Europe due to competitiveness issues and limited recycling capacity. This is a sharp increase compared to 2022 (+36.5%). At the same time, as much as 70.4% of collected plastic waste was still incinerated (48.9%) or landfilled (21.5%), which shows the scale of the challenges facing the European circular economy.

**CIRCULAR PLASTICS PRODUCTION EVOLUTION
(Mt)**



 Circular

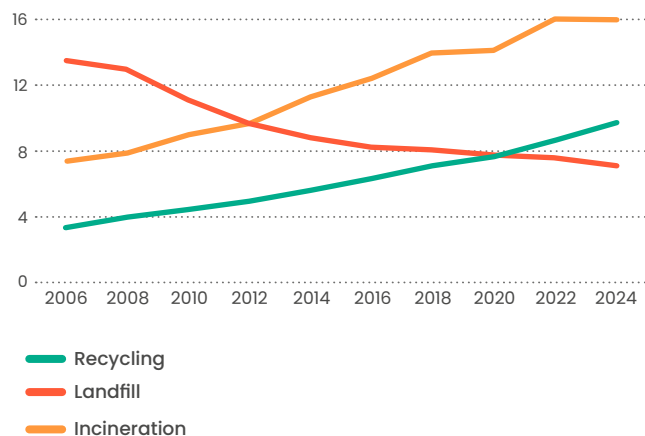
**CIRCULAR PLASTICS CONVERSION EVOLUTION
(Mt)**



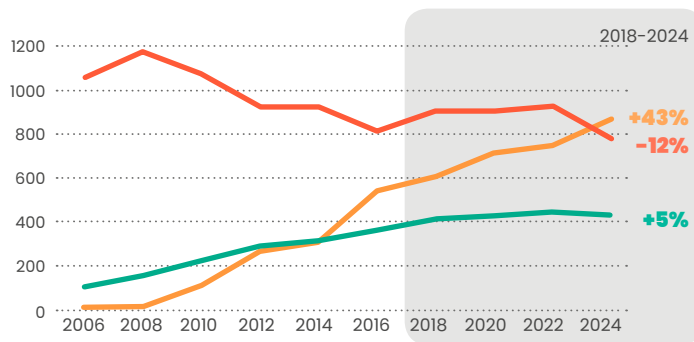
Źródło danych: [Source: The Circular Economy for Plastics – A European Analysis, Plastics Europe](#)

These figures are particularly concerning in the context of growing interest in investments in waste-to-energy facilities. Poland currently operates 11 thermal waste treatment plants², while a further 18 facilities that have received funding under the National Fund for Environmental Protection and Water Management (NFOŚiGW) programme Rational Waste Management are either under construction or at the planning stage³. This is expected to further increase the country's waste incineration capacity in the coming years. When making investment decisions, it is important to consider the risk that expanding incineration capacity could reduce the volume of waste available for recycling and make it more difficult to achieve circular economy objectives.

EVOLUTION OF POST-CONSUMER PLASTIC WASTE TREATMENT (mt)



POST-CONSUMER PLASTIC WASTE TREATMENT EVOLUTION (kt)



² <https://portalkomunalny.pl/koniec-naboru-wnioskow-o-dofinansowanie-itpo-30-kwietnia-2024-554032/>

³ <https://www.portalsamorzadowy.pl/gospodarka-komunalna/ponad-3-mld-zi-na-18-spalarni-odpadow-takie-zaklady-maja-powstac-w-polsce.605094.html>

In Poland, 2,089,000 tons of plastic waste were collected in 2024. Only 436,000 tons were recycled, 865,000 tons were incinerated and 788,000 tons were sent to landfills. A stable increase in the amount of waste recycled is a positive trend, however the dynamics of recycling development is clearly lower than that of waste incineration. Compared to the European average, recycling in Poland is developing much slower – the amount of recycled waste in Europe has increased by 36.6% since 2018, while in Poland it has increased by only 5%. The level achieved in 2024 (20.9%) is also clearly lower than the average for the whole of Europe (29.6%). In Poland, the amount of plastic waste landfilled is still significant (37.7%) and although it decreased by 12% compared to 2022, this decrease was mainly due to the shift of the waste stream to incineration rather than recycling. In 2022, 35.2% of waste was incinerated, and in 2024 this share has already increased to 41.4% .



The trends observed for plastic waste are also reflected in the broader municipal waste management system in Poland. According to data from Statistics Poland (GUS) , only 17.6% of collected municipal waste was recycled in 2025 (compared with 18.3% in 2024). At the same time, 24.8% of waste was directed to energy recovery (up from 21.9% in 2024), while nearly one third of the total waste stream (28.2%) was landfilled, representing a slight decrease from 30.1% in 2024.

⁴ The Circular Economy for Plastics – A European Analysis, Plastics Europe

⁵ National infographics – Circular Economy for Plastics 2026 • Plastics Europe

⁶ Ochrona środowiska w 2025 r. | Publikacje | GUS – Portal Informacyjny

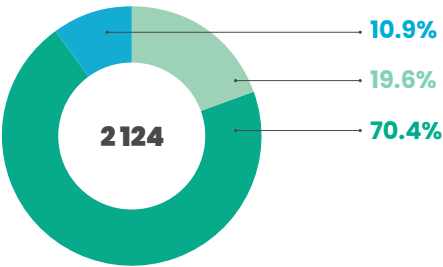
Poland, with a plastic production of approx. 2.1 million tonnes, ranks 8th in Europe, accounting for a 3.8% share. The production of circular plastics from mechanical recycling of post- and pre-consumer waste in 2024 was 29.6% (the EU average was 19.7%).

In 2024, 3.9 million tons of plastics were processed in Poland, which with a share of 7.4% gives Poland 5th place in Europe. The share of recycled circular plastics (from mechanical recycling) was 16.9% (the EU average was 19.6%).

In Poland, plastics are not produced in the process of chemical recycling and with the use of bio-based raw materials. A similar situation is also the case across Europe, where the share of plastics produced from post-consumer waste in the chemical recycling process is negligible at only 1.1%, and the share of bio-based or attributed bio-based content is 0.2% of total production^{7, 8}.

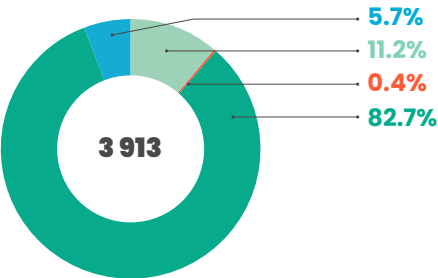
PLASTICS PRODUCTION

2024 (in kt)



PLASTICS CONVERSION

2024 (in kt)



- Mechanically recycled (post-consumer)
- Bio-based
- Fossil-based
- Mechanically recycled (pre-consumer)

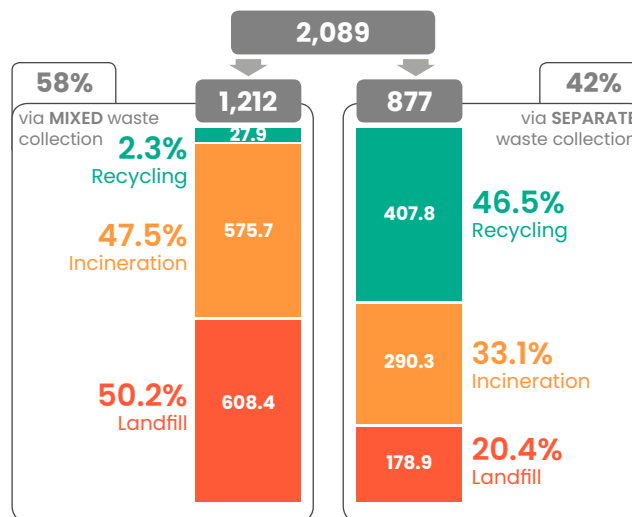
Source: [National infographics – Circular Economy for Plastics 2026](#) • [Plastics Europe](#)

7 [The Circular Economy for Plastics – A European Analysis](#), Plastics Europe
8 [National infographics – Circular Economy for Plastics 2026](#) • [Plastics Europe](#)

How to accelerate the pace of circular transformation?

To accelerate the circular transformation of Poland's plastics sector, it is necessary to simultaneously increase the availability of high-quality recyclable feedstocks and create stronger market incentives for their use. As shown by Plastics Europe data, the development of selective waste collection systems and the associated challenges are of critical importance.

POST-CONSUMER PLASTIC WASTE COLLECTION AND TREATMENT 2024 (in kt)



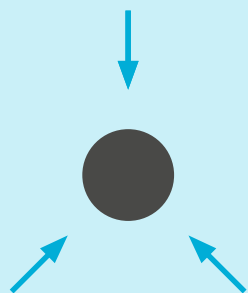
Polish plastic waste recycling rates are **x20 higher when collected separately**, compared to mixed collection streams.

Source: National infographics – Circular Economy for Plastics 2026 • Plastics Europe

Plastic waste that currently does not reach recycling streams due to system inefficiencies, insufficient infrastructure, or poor sorting quality should primarily be regarded as untapped potential for improving waste management, rather than as a justification for expanding incineration capacity. The priority should be to further improve the efficiency of collection, sorting, and recycling systems in order to minimise the loss of valuable materials and keep them circulating within the economy for as long as possible.

It is equally important to include waste incinerators in the EU ETS system, which will reduce the economic attractiveness of incineration of recyclable materials and allow for the return of valuable raw material, which is plastic waste, to the economy. In Poland, the amount of plastic waste sent for incineration has increased by 43% since 2018, despite the fact that a significant part of it could be mechanically or chemically recycled and reused. As a result of incineration, the raw material is irretrievably lost.

The third pillar should be a well-designed extended producer responsibility (EPR) scheme, which would reward the eco-design of packaging and products that are easy to recycle and contain recyclates. Such a mechanism would increase demand for secondary raw materials, improve the competitiveness of recycling and help Poland reach the goals of the circular economy faster.



19%

of circular plastics
used in Europe rely
on imports. And **24%**
of the total demand.

Industry competitiveness in the spotlight

Europe faces a clear strategic choice today: either safeguard its vital industrial base or cede further ground to global competitors, increasing import dependency and weakening its economic security.

Plastics are a critical raw material for strategic sectors that underpin Europe's economic, energy, health, and defence security. They bolster our continent's autonomy and enable us to compete globally in low-carbon value chains and in the clean and net-zero technology sector. Consequently, our industry prioritizes strengthening political recognition and the „license to operate“ of the European plastics sector as an essential pillar of the EU economy and the broader industrial base – as well as shaping predictable short- and long-term policy frameworks at both EU and Member State levels that foster a competitive investment environment and safeguard Europe's industrial potential.

The review of the EU's competitiveness and decarbonization agenda, launched early last year, is now taking concrete shape through specific legislative proposals. Whether involving entirely new legal acts, such as the Industrial Accelerator Act (IAA) and the Circular Economy Act (CEA), or the continuation of work on secondary legislation (as is the case with the PPWR), these initiatives require strong engagement and commitment from European industry to ensure the resulting legislation effectively delivers on our shared objective: strengthening Europe's strategic and economic autonomy, grounded in circularity principles and the leveraging of innovation-driven advantages.

What's new?

The Industrial Accelerator Act (IAA), work on which accelerated in March 2026, identifies the plastics sector as a strategic industry for Europe. Throughout the legislative process, the plastics industry has highlighted the need for instruments within the Act that stimulate market demand for low-emission products and those derived from sustainable carbon sources; such measures would support European plastics value chains – for instance, by introducing requirements regarding EU origin. These measures are intended to strengthen Europe's industrial base and accelerate the transition toward a circular, low-emission economy. Finalization of the IAA is expected by the end of 2026.

The industry has high expectations for the **Circular Economy Act** legislative proposal scheduled for the fourth quarter, which is built around three key pillars: (1) reducing EU dependence on imports of critical raw materials; (2) simplifying the regulatory framework and removing barriers within the Single Market; and (3) strengthening markets for secondary raw materials. Discussions reveal that circularity is no longer merely an environmental goal; it is increasingly viewed as a driving force for industrial competitiveness and strategic autonomy. Given that Europe's transition towards circular plastics is not progressing at a sufficient pace or scale (see pages 17–18), there is a risk that Europe will fall behind in the global race for circular plastics, which would impact both its sustainability goals and its industrial competitiveness. We therefore call for the CEA to be designed in a way that bridges the gap between climate ambitions and economic realities.

We identify six key factors essential for transforming the plastics system, ranging from the most obvious – such as creating strong market demand for circular plastics in Europe – to more systemic ones, such as strengthening

governance processes and public awareness. Close cooperation between EU policymakers and the entire plastics value chain – including through initiatives such as the Critical Chemicals Alliance (CCA) and the Circular Plastics Alliance (CPA) – will be fundamental to developing effective and enforceable solutions.

Nearing the Finish Line

The PPWR – the initial provisions of which have just entered into force – is an example of legislation which effectiveness relies on subsequent implementing and delegated acts scheduled for the coming years. Many provisions of the regulation itself require further clarification; indeed, the FAQ document published in March 2026 saw an updated, **expanded version released by the end of July**. This version added new clarifications on key issues – such as the distinction between unit, grouped, and transport packaging – and confirmed that, while the PPWR harmonizes registration and reporting requirements under Extended Producer Responsibility (EPR) schemes, Member States may still request additional information or documentation if they deem it necessary and proportionate for monitoring and enforcing EPR obligations.

In the near term – specifically by the end of this year – three further pieces of secondary legislation crucial to the industry are expected to be finalized: on the conditions for importing recycled materials into the EU for use in packaging, on the harmonization of rules for calculating and verifying recycled content in plastic packaging, and on sustainability criteria for recycling technologies.

All three issues require detailed industry expertise, which is being provided on an ongoing basis to the relevant EU and national administrative bodies. **The plastics industry, in particular, emphasizes** that sustainability criteria for

plastics recycling technologies under the PPWR should be clear, practical, and technology-neutral. The framework should define minimum eligibility criteria rather than ranking recycling methods, thereby allowing all recycling technologies to effectively contribute to achieving recycled content targets. It should also ensure investment certainty, enable the scaling up of innovative recycling technologies, and safeguard EU competitiveness, while simultaneously ensuring large-scale plastics circularity. Selecting a specific technology where it delivers the greatest value maximizes circularity and reduces greenhouse gas emissions compared to waste incineration.

The proposal for a new **Extended Producer Responsibility (EPR)** system remains a major topic in national legislation, although it is difficult to find a convincing justification for the prolonged process of drafting and consulting the legal provisions – contained in the draft Act on Packaging and Packaging Waste – that define the new EPR system for packaging in Poland.

In its repeatedly stated position, aligned with the broad and persistent opposition expressed by numerous industries to the solutions retained in the draft legislation, the Foundation has emphasized the need to establish an EPR system as an effective tool for achieving circular economy objectives. The draft Act has been assessed as incomplete, imprecise, and lacking transparency, as well as inconsistent with EU legislation in many areas. Industry holds the view that EPR should function as an environmental instrument rather than merely a financial mechanism. The proposed solutions, such as centralizing the system under a single – and public – entity, distance Poland from European standards, limit the potential for transitioning to a circular economy, and negatively impact the EU Single Market, which is a crucial instrument for safeguarding the competitiveness of the European economy. The direction set by EU policy – specifically the upcoming Circular Economy Act – aims to create a unified market for waste and secondary raw materials, presenting an opportunity to harmonize EPR systems across Member States.

The industry called for this harmonization in its **recommendations issued in February of this year** – which is particularly important given the entry into force of Regulation (EU) 2025/40 on packaging and packaging waste. In its position statement, the Foundation also highlighted the need for appropriate regulation of the eco-modulation of packaging fee rates, based on sound methodological grounds and taking into account the actual environmental impact of products throughout their entire lifecycle. In the industry's view, EPR fees must remain linked to waste management for products covered by the EPR scope, rather than to the general state budget. .

The Regulation on end-of-life vehicles (EU 2026/1738) – the ELVR – was published in the Official Journal of the EU on July 24, 2026. For the plastics industry, requirements regarding the mandatory recycled content in plastics used in newly type-approved vehicles are of key importance: at least 15% from September 1, 2032, and 25% from September 1, 2036. Furthermore, at least 20% of the required recycled plastic must originate from end-of-life vehicles or used automotive parts. Permissible recycling technologies include chemical recycling, and provision has also been made for a review of regulations concerning bio-based plastics. The regulation entered into force on August 12, 2026, and will apply from September 1, 2028.

June of this year also saw the conclusion of the long-running process of **drafting an implementing decision** establishing harmonized EU rules for calculating, verifying, and reporting the recycled content of single-use plastic beverage bottles. For plastics producers, this formally marked the end of the lengthy debate concerning the mass balance methodology in chemical recycling technologies.

Pellet loss prevention

The issue of plastic pellet presence in the environment has been on the agenda of European Union institutions for the past eight years. Currently, the prevention of plastic pellet losses and leakage into the environment is addressed in two pieces of EU legislation: Commission **Regulation (EU) 2023/2055, amending Annex XVII to the REACH Regulation** (intentionally added synthetic polymer microparticles), and **Regulation (EU) 2025/2365 on preventing plastic pellet losses to reduce microplastic pollution** (unintentional releases).



As noted in our previous annual report, Plastics Europe and its local offices have been strongly engaged in the legislative process from the outset. As a result, the Regulation, which entered into force in December 2025, takes into account the industry's existing experience, expertise, and voluntary initiatives in preventing plastic pellet losses.

In accordance with Regulation (EU) 2023/2055, from 31 May 2026 manufacturers and downstream industrial users that use synthetic polymer microparticles (SPMs) in their operations are required to report annually the estimated quantities of SPMs released into the environment, not only from their facilities but also during transport. Given this obligation, and in the absence of a harmonised methodology established by the European Commission, Plastics Europe, together with industry associations, proposed a set of minimum reporting criteria and supporting guidance. The resulting **Guidelines to estimate pellet loss for reporting under the REACH restriction on intentionally added microplastics** are intended to serve as an interim methodology, helping companies comply with their reporting obligations until a uniform, harmonised methodology is established, as required under Article 18 of Regulation (EU) 2025/2365.

Plastics Europe Polska is actively involved in efforts to prevent plastic pellet losses by organizing webinars and workshops for the plastics value chain (independently and in cooperation with other industry associations) presenting the obligations arising from the new legislation as well as the tools available to facilitate compliance, including the OCS Europe certification system and the new Guidelines.



Export of sorted plastic
waste increased by

+36.5%

since 2022, reaching 1.5 Mt.

Circular Plastics Compass



Launched by Plastics Europe Polska in May 2026, Circular Plastics Compass is a series of industry meetings, workshops, and webinars aimed at bringing together stakeholders from across the plastics value chain to explore the most effective pathways towards a circular and competitive plastics economy in Europe.

The substantive basis and point of reference for this initiative is the Plastics Europe report „Circular Economy for Plastics – a European Analysis 2026”.

The programme has been divided into three complementary stages: the inaugural expert session „Circular Plastics Compass Starter”; the „Circular Plastics Compass Lab” workshop phase, comprising discussions and educational webinars; and the „Circular Plastics Compass Conference” – a concluding conference held in Warsaw on September 23.

The conclusions drawn throughout the entire cycle will be compiled into a summary document and promoted across media outlets, our own channels, industry events, and advocacy activities.

Patrons and partners: Ministry of Economic Development and Technology, Ministry of Climate and Environment, BASF Polska, Employers’ Association EKO-PAK, Bank Pekao S.A., INNOWO, Rzeczpospolita

Trade fairs, conferences and industry events

A circular and competitive future for the European plastics system is a key theme we address at numerous events. As a partner of the new edition of Circular Week and the European Sustainability Congress 2025 – organized by the INNOWO Institute – we were involved in a student competition and a debate on the bioeconomy; additionally, in collaboration with Ergodesign, we organized an online workshop titled „Plastics, the Circular Economy, and Ecodesign.”

Once again, we co-organized the „Good Practices in Waste Management – Let’s Talk About...” conference in collaboration with the Circular Economy and Recycling Cluster, MTP (Poznań International Fair), and Tomra; during the event, we delivered a presentation on eco-modulation and participated in an expert debate titled „Recycling vs. EPR.”



Photo: Targi Kielce

Plastpol Fairs 2026

The report „Circular Economy For plastics 2026”

premiered at the PLASTPOL 2026 International Fair of Plastics and Rubber Processing. In addition to data from the report, Plastics Europe Polska presented an **overview of the industry’s condition** based on official Polish and European statistics as well as its own data.

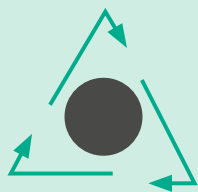
We also actively participated in events such as PlastInvent, Plastech, the “Go to the Future” Sustainability Forum, the Sustainable Industry Lab, and the 16th Conference on Fuels from Waste.

As part of Pack4Future – a workshop-style conference organized by FoodFakty – Plastics Europe Polska hosted a session titled „From Innovative Production to Certification: Safe, Competitive and Circular Plastic Packaging.” The session featured presentations, one-on-one discussions with representatives of member companies and a panel discussion on the competitiveness of the European plastics industry.

During the 19th edition of Plastics Industry Meeting, a key gathering of the plastics industry, organised by Plastics Europe Polska and the Polish Union of Plastics Converters (PZPTS) in Kielce on the eve of the Plastpol Trade Fair, experts examined how to ensure a level playing field for Europe amidst global competition in the plastics market. Representatives of the Polish plastics value chain and government administration agreed on the need to implement coherent systemic solutions and to boost both the scale and market appeal of recycled raw materials. The partners for this edition were Targi Kielce, Bank Pekao S.A., and Lewiatan Confederation. A summary of the event is available **on our website**.



Plastics Industry Meeting 2026



29.6%

(9.7 Mt)

of plastic waste was
recycled.

Education and communication

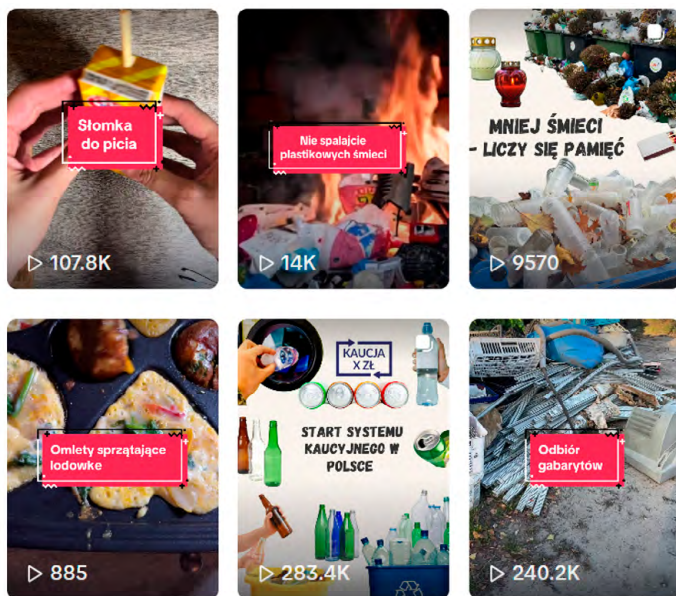
Educational projects run by the PlasticsEurope Polska Foundation for the past 15 years have, from the very beginning, enjoyed strong recognition from both teachers and students. They constitute an important complement to environmental education, particularly in the areas of sustainable plastics use and proper plastics waste management.

The flagship programme, “Plastek and His Magic Box,” targeted at the youngest students (aged 5–10), has evolved over the years and has been enriched with new educational materials: online lessons with Plastek, a presentation for teachers, the website eksperymentyplastka.pl, and others. It is worth emphasizing that all materials associated with the programme are provided to schools free of charge.

The last school year was the final year in which the Foundation distributed Plastek experimental kits to schools. As a complement to the extensive range of resources available to teachers, a lesson plan for Grades 1–3 entitled “Tracking Plastics” („Na tropie tworzyw sztucznych”) was developed in cooperation with our educational partner – Cyfrowy Dialog. The lesson introduces young students to the world of plastics through a STEAM-based



approach. Referring to Plastek's online lessons, the lesson plan was made available to all teachers participating in the programme or it can also be implemented as a standalone educational resource, without the need for the Plastek experimental kit. In addition, the Foundation, in cooperation with the Cyfrowy Dialog, carried out extensive promotion of **all educational materials related to the "Plastek and His Magic Box" programme** among schools, using a variety of communication channels, social media platforms, and the educational portal edunews.pl.



#ZielonaSroka TikTok profile

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 partnered up with #ZielonaSroka eco influencer. The primary objective of the initiative was to reach TikTok users with the campaign's messages.

Under the agreement and based on the provided briefs, the influencer recorded and published two videos (see the **first** and **second** clips) – covering the topics of waste incineration and plastic recycling – on both TikTok and her Instagram account.

In total, the videos generated nearly 80,000 views, 700 likes, 200 comments, and 60 saves.

We conducted an adapted pan-European campaign #PlasticsMakesItPossible across social media, on our website, and in cooperation with the Euractiv.pl portal. The campaign focused on the declining competitiveness of the European plastics industry – this topic was explored in greater detail in a **dedicated section** on our website addressing the associated challenges.

We also informed on daily basis 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**. Also industry media – including **Chemia i Biznes**, **Plast Echo**, **Tworzywa**, **tworzywa.pl** – regularly report on our activities.

TWORZYWA SZTUCZNE.
NIEKTÓRZY WIDZĄ PROBLEM.
MY WIDZIMY POTENCJAŁ

 **PLASTICS EUROPE**
Enabling a sustainable future

#PlasticMakesItPossible

Kampania #PlasticsMakesItPossible



More than

70%

of plastic waste
is still sent to
incineration or
landfill.

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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