

Brussels, 11 February 2026

## **Europe's Strategic Autonomy and Economic Security at Risk: Securing Critical Plastics Production, Innovation and Circularity in Europe.**

Dear Members of the European Council,

Dear President Costa,

Dear President von der Leyen,

Ahead of the informal EU Leaders' retreat on Thursday, 12 February, Plastics Europe and its members urge decisive political action to stabilise and secure plastics production, innovation and circularity in Europe – before further capacity, investment and know-how are irreversibly lost.

Europe faces a clear strategic choice: safeguard a critical industrial base or cede further ground to global competitors – deepening import dependence and weakening Europe's economic security.

Plastics Europe represents more than 90% of polymer producers in Europe, supporting a value chain of approximately 1.5 million jobs and €400 billion in annual turnover. Plastics are indispensable to almost every strategic sector, underpinning Europe's economic resilience, climate transition and strategic autonomy.

**Europe's plastics industry is at a tipping point.** Europe's share of global plastics production has fallen from 22% in 2006 to just 12% in 2024<sup>1</sup>, while production continues to expand elsewhere. This decline is not driven by falling demand, but by investment shifting to more competitive regions.

The consequences are material and lasting. Increased reliance on imports exposes Europe to supply disruptions, geopolitical risk and uneven global standards. Once capacity closes in this capital-intensive industry, it rarely returns – taking innovation ecosystems with it.

To safeguard Europe's industrial resilience, competitiveness and strategic autonomy, **Plastics Europe calls for urgent action:**

- **Bridge Europe's energy and carbon cost gap**, including through the effective use of ETS revenues to keep production viable during the transition.

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<sup>1</sup> Plastics the Fast Facts 2025 - Global and European plastics production and economic indicators. Source *Plastics Europe*

- **Provide a predictable, investment-ready and technology-neutral regulatory framework**, including clear methodologies for recycled-content rules, enabling long-term investment decisions.
- **Drive demand for circular and low-carbon plastics made in Europe**, including through voluntary public procurement and EPR-based incentives.
- **Ensure a strong and functioning internal market for circularity**, with harmonised end-of-waste rules, streamlined intra-EU waste shipments, and material- and technology-neutral conditions enabling circularity hubs at scale.
- **Ensure fair and consistently enforced trade rules and market transparency**, including protection against global overcapacity and dumping, and robust import/export data monitoring for plastics waste.

**Competitiveness, innovation and circularity are inseparable.** Innovation in materials, processes and recycling technologies depends on competitive investment conditions. Circular plastics strengthen Europe's resource security, reduce emissions cost-effectively and enable global competitiveness based on quality, traceability and high standards. Without a competitive industrial base, Europe risks outsourcing both production and environmental impact – while losing the economic value of the transition.

The current trajectory is not inevitable. Whether Europe remains a place where plastics are produced, innovated and recycled at scale is ultimately a political and strategic choice. The window to stabilise Europe's industrial base while delivering the circular transition is narrowing rapidly.

Action at political level is needed without delay. Plastics Europe stands ready to work with EU institutions and Member States to advance this shared strategic objective for and in Europe.

Yours sincerely,



Rob Ingram  
CEO, INEOS Olefins & Polymers Europe  
President Plastics Europe



Virginia Janssens  
Managing Director  
Plastics Europe