

Minutes of the VinylPlus Monitoring Committee Meeting

5 December 2024, 14h00 - 15h30

Topos Parliament- Business Centre, Rue d'Arlon 25, 1050 Ixelles

Attendees:

Ms Laurine Biver	Executive assistant, VinylPlus
Mr Stéphane Content	Senior Technical Advocacy Manager, VinylPlus
Ms Sarah Debbiche Krichen	Senior Public Affairs Manager, VinylPlus
Prof. Jo Dewulf	University of Ghent
Ms Lina Dunauskiene	European Commission, DG GROW
Ms Sylvie Famelart	Senior Communications Manager, VinylPlus
Mr Mihkel Krusberg	European Commission, DG ENV
Mr Ettore Nanni	President, ESPA
Ms Dorota Napierska	Toxic-Free Circular Economy Policy Officer, Zero Waste Europe
Ms Olga Pozlevic	European Commission, DG GROW
Ms Charlotte Röber	Managing Director, VinylPlus
Mr Geoffroy Tillieux	Director, Technical Department, EuPC
Ms Ingrid Verschueren	General Manager, Recovinyl
Mr Mathieu Vuylsteke	Assistant to MEP Johan Van Overtveldt

Excused:

Ms Laure Baillargeon	European Commission, DG GROW
Mr Armand De Wasch	Euroconsumers
Mr Werner Bosmans	European Commission, DG ENV

1. Welcome

J. Dewulf welcomed the participants. As there were a number of new participants, a tour de table was conducted.

2. Approval of agenda

All participants approved the agenda.

3. Approval of minutes

The minutes of the meeting held on April 18, 2024, were approved. The date of the next meeting was agreed for April 28, 2025 at 14:00.

4. Future Role of the Monitoring Committee

C. Röber introduced the conversation. She outlined the current activities of the Monitoring Committee, before proposing three changes for future activities. In terms of participants, C. Röber proposed to increase industry involvement through a rotating VinylPlus Board member representation. In terms of mission, C. Röber proposed that the Monitoring Committee have a sounding board function and engage in discussions on future VinylPlus activities. Lastly, in terms of

Communications, C. Röber proposed regular written updates in-between meetings, for example in the form of short, bi-monthly updates on activities/events/market.

O. Pozlevic supported the idea of having companies around the table, especially in light of the upcoming Clean Industrial Deal. For updates between meetings, she expressed that information in meetings is sufficient, but reports, positions, studies, and memos being produced could be useful, especially in light of the Circular Economy Act.

L. Dunauskiene added that indeed, talking with industry is useful, and so are updates on technical projects is useful.

J. Dewulf confirmed that receiving information is valuable and asked for structured and concise updates, stressing that an overflow of information should be avoided.

D. Napierska expressed interest in getting transparent data, notably to understand the flow of PVC inside and outside Europe.

5. VinylPlus Programme Implementation

Update on mid-term target review

C. Röber outlined the timeline and milestones for the ongoing mid-term target revision and asked the Committee whether they would be willing to provide input on the draft revised target around September 2025, ahead of the finalisation of the review planned for end-2025.

Commission representatives stated that several Units may need to be involved depending on the topics covered by the targets (i.e. construction, ESPR, CPR).

C. Röber outlined preliminary findings on the current Commitment across all three pathways, which demonstrate that while some targets have been achieved, others were not or are no longer relevant given related legislation that was adopted in the meantime.:

Members discussed pathway one in greater detail:

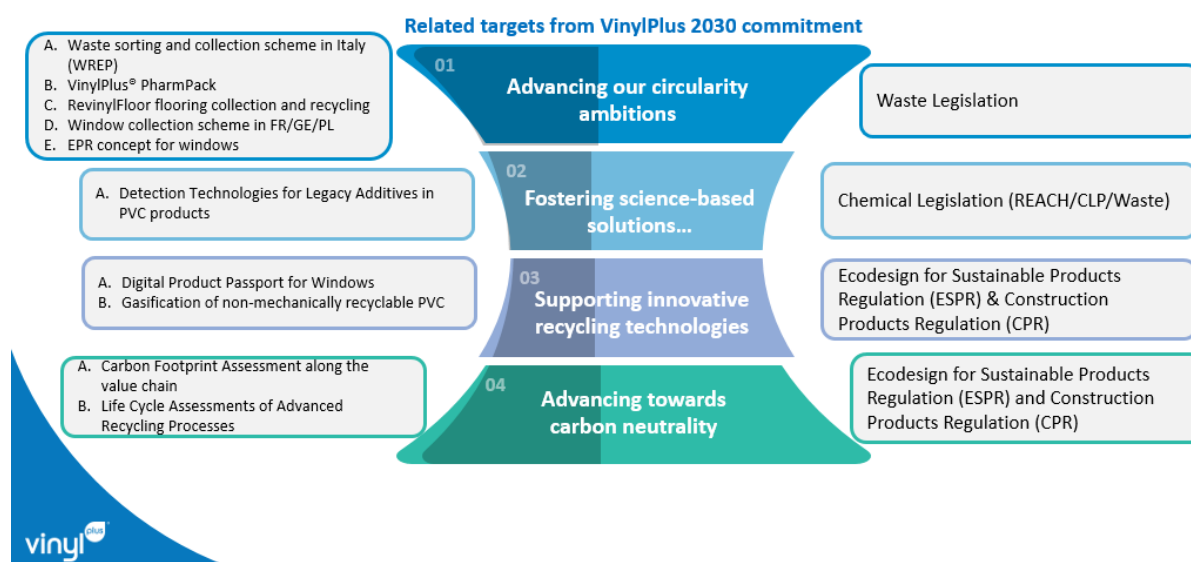
- It was clarified that 2023 data is being used as the basis for this mid-term review.
- Participants discussed causes of the current difficulties met by recyclers, including competition with the price level of virgin PVC, and dumping of virgin PVC.
- It was clarified that these difficulties are not linked to imports/exports of waste or recyclates outside Europe, as both remain low. The bigger issue when it comes to import is that of import of finished articles, and the impact of these imports on the lifecycle management of PVC products in Europe should they be non-compliant with EU legislation. It was noted that imports of recyclate or waste may be less of an issue as recycled content targets are not yet in place, which may change in the future.
- Additionally, it was highlighted that to improve recycling for PVC, the focus needs to be on collection, sorting and separation, and recycling of legacy additives as capacity is not an issue.
- Regarding legacy additives, it was noted that these cause issues for recycling beyond the plastics industry (i.e. paper industry), and need comprehensive solutions in terms of recycling.

- EPR schemes, where they are present (i.e. France) have not yet yielded an increase in recycling. Seeing the results may require a little more time, as the collection is still complex to establish.
- Pre-demolition audit, whilst addressed mainly at industrial construction, could support increased recycling, especially in combination with Digital Product Passports.

Highlights from key technical projects 2024 & key applications 2025 – How do they matter to current EU Initiatives?

C. Röber outlined the projects that VinylPlus is evaluating to co-finance in 2025.

2025: Technical Projects - Targets - Regulatory Relevance



Technical projects participate in achieving the targets set out in the Commitment. The last two projects on carbon footprint and life cycle assessment will also be used toward the the mid-term review.

O. Pozlevic expressed a specific interest in the collection projects, which could be relevant to the Circular Economy Act. Construction and demolition waste is the biggest waste stream to be tackled and requires integration with the Construction Products Regulation. It was mentioned that design for recycling standards are being developed for PVC pipes and windows.

6. Update on the European PVC Value Chain

Recycling & converting figures

I. Verschueren introduced Recovinyl and the Recotrace system, stressing that the work is based on real data, which is audited or verified. She then outlined the 2023 results in terms of recycling of PVC waste and conversion of PVC recyclates into new products.

I. Verschueren presented the 2024 year-to-date results for recycling and converting (use of PVC recyclates):

- Recycling: 466.215 tonnes
- Converting: 290.000 tonnes

The expectation is that these figures will increase, as some volumes have not yet been reported, but we will not reach 800.000 tonnes of recycling.

I. Verschueren reminded the committee that the registration of data from converters only started a few years ago, and all recyclate used has not yet been tracked due to the high number of converters present on the European market (>6000).

The only country that is nearly reaching the recycling target is the UK. However, the picture is much bleaker for EU countries, and some recycling companies are closing. For the UK, a key difficulty is that since the revision of the Waste Shipment Regulation, shipping has become much more difficult.

The overall picture is pessimistic due to low demand for EU-produced recycled PVC, a slow construction market, reduced production levels, competition with virgin PVC, reduced local investments, and rising imports or dumping from outside the EU.

The following remarks were made:

- Whilst some recyclers switch to other materials, this is still limited.
- At present, we do not know what is recycled in comparison to the total volume of waste coming on the market, which would be needed to express recycling in percentages rather than absolute numbers.
- A critical issue is the price of recyclates. In this, it should be noted that virgin and recycled PVC do not have the same cost structure.
- Legislation to favour the use of recyclate could be beneficial, but needs to consider the risk of getting import of recyclates which are contaminated, and recyclers still closing because of unfair competition. A mechanism is needed in the Circular Economy Act to incentivise demand without risking negative effects, but recycled content targets alone are not enough, especially as final articles can still be imported, and verifying the recycled content may be difficult (certification could be used).

Market update

S. Content outlined that the market is contracting, and showed:

- A decrease of PVC demand in Europe.
- The evolution in the use of imported resin, resin produced in the EU and resin containing recyclates.
- Capacity (6700) versus volume sold to EU converters (3800), with a clear overcapacity
- PVC used by application.
- Share of imported products, with a strong increase of imports with around 700.000 tonnes entering the EU market.
- Significant and increasing imports of resin, notably from the USA.

Lastly, S. Content outlined the main observations and potential remedies.

Participants discussed:

- Competitiveness of European PVC resin & products.
- Market surveillance & enforcement for articles.
- Possible actions for the future Clean Industrial Deal, for example, to boost demand of EU products.

VinylPlus has produced a new infographic showing the full lifecycle of PVC, which is available here: [PVC: A Journey from Manufacturing to Recycling - VinylPlus](#).

Link to current EU initiatives

VinylPlus presented an update of ongoing projects on:

- Market surveillance
- Waste modelling
- Microplastics
- LCA for cables
- iRMOA

Regarding the market surveillance project, it was noted that the fact that Eastern Europe is not covered is an issue, and expanding the study should be considered.

L. Dunauskiene updated the group on current work regarding the follow-up to the ECHA investigation report on PVC and PVC additives.

7. VinylPlus sustainability forum

S. Famelart invited members to attend the VinylPlus Sustainability Forum 2025 (#VSF2025) which will take place next year, on May 21-22 in Paris, France, with the theme “For a future-proof value chain”.

8. Wrap-Up

J. Dewulf wrapped up the meeting, and summarised the key points as follows:

- There is an evolution of the role of the Committee, and members welcome extending industrial members’ participation as well as having access to relevant information (studies, positions, data).
- The Committee will be informed and involved in the mid-term review of the VinylPlus 2030 Commitment by September 2025.
- There are several relevant technical projects upcoming in 2025 and the Committee has a specific interest in collection projects.
- The current picture for recycling and for the market in general is pessimistic, and this concern goes beyond VinylPlus.
- During the next meeting, the Committee will review, comment, and approve the 2025 progress report.

Action	Lead	Deadline
Invite a VinylPlus Board member to participate on a rotating basis	CR	28/04/2025

Propose a structure for information updates to the Committee (including regularity and type of information to be provided).	CR	28/04/2025
Clarify the timeline for consultation of the Committee on the Mid-term review	CR	28/04/2025
Exchange views on concrete proposals for the Clean Industrial Deal	O. Pozlevic/ VinylPlus	Q1 2025
Share the study on pipe (Dutch project to map pipes network)	CR	19/12/2024