Minutes of the VinylPlus Monitoring Committee Meeting

28 April 2025, 14h00 - 16h00
Topos Parliament – Business Centre, Rue d'Arlon 25, 1050 Ixelles

Attendees:

Mr Stéphane Content	Senior Technical Advocacy Manager, VinylPlus
Prof. Jo Dewulf	University of Ghent
Ms Charlotte Röber	Managing Director, VinylPlus
Ms Ingrid Verschueren	General Manager, Recovinyl
Mr Geoffroy Tillieux	EuPC
Mr Ettore Nanni	President, ESPA
Ms Nicole Edouard	Policy Officer, VinylPlus
Ms Caroline Braibant	Senior Manager, VinylPlus
Ms Dorota Napierska	Toxic-Free Circular Economy Policy Officer, Zero Waste Europe
Ms Olga Pozlevic	European Commission, DG GROW
Mr Mathieu Vuylsteke	Assistant to MEP Johan Van Overtveldt
Ms. Marthe Caeyers	Assistant to MEP Johan Van Overtveldt
Mr Mihkel Krusberg	European Commission, DG ENV
Ms Armand de Wasch	Euroconsumers
Ms Sylvie Famelart	Senior Communications Manager, VinylPlus

Excused:

Ms Laure Baillargeon	European Commission, DG GROW
Mr Werner Bosmans	European Commission, DG ENV
Ms Lina Dunauskiene	European Commission, DG GROW
Ms Laurine Biver	Executive assistant, VinylPlus

1. Welcome & Introduction

J. Dewulf welcomed the participants. As there were a number of new participants, a tour de table was conducted. He defined the purpose of the meeting, which was to discuss the VinylPlus Progress Report 2025, to report on the ongoing activities and projects and to share opinions and points of view. The date for the next in person meeting was agreed for December 2, 2025 from 14:00 to 16:00.

2. Approval of agenda

The agenda was slightly modified ahead of the meeting and three points were added. All participants agreed on the changes and approved the agenda.

3. Approval of minutes

The minutes of the meeting held on 5 December 2024 were approved.

4. VinylPlus Progress Report 2025

Final review and endorsement

S. Famelart introduced the conversation. She gave a brief overview of the VinylPlus Progress Report 2025 and explained the steps VinylPlus went through to have it ready. After the last draft being audited, it was circulated to the Monitoring Committee earlier in April 2025.

Circularity Figures (Pathway I)

I. Verschueren set the scene to discuss about the Circularity Figures. She briefly described the challenges the PVC sector is going through from the pandemic to today. She presented some verified data on the amount of PVC waste, recycling and converting for the period 2020-2024. In 2024, despite challenging market conditions, Recovinyl recorded over 724,000 tonnes of recycled PVC waste via RecoTrace. Of this, 470,000 tonnes were registered as being converted into new products—an increase of 4.2% compared to the previous year. This growth came primarily from new converters joining the network, rather than increased usage by existing participants. However, it is important to note that these figures do not fully capture the total use of recycled PVC in Europe. While Recovinyl represents a significant share of recyclers, its current network does not yet include a representative portion of converters using recycled PVC. As a result, actual usage is higher than what is shown in our data. Expanding our network of converters remains a key priority, and Recovinyl is committed to closing this gap to better reflect the full picture of PVC recyclate use in Europe.

O. Pozlevic asked a question about potential issues in the intra-EU movement of PVC waste.

I. Verschueren and C. Röber referred to two examples in the UK (administrative and costs issues) and Austria.

E. Nanni noted that it would be interesting to track waste entering Europe from third countries.

Projects (Pathway I & II)

S. Content took over and outlined the current technical projects that VinylPlus is coordinating, linking them to Pathway I & II of the VinylPlus Commitment. He explained the purposes of the projects in Pathway I & II, namely increasing the circularity of PVC, improving collection and sorting, improving the detection of additives in PVC waste to prove their safe and sustainable use, and showing the potential for decarbonisation in the entire PVC value chain. He then went into the details about some of the projects underway.

- Pathway I – Scaling up PVC value Chain Circularity – six ongoing technical projects on:
    - Window profiles;
    - Pipes;
    - Flooring;
    - Sorting legacy additives (a webinar with ECHA was held earlier in April 2025 to show no risk justifies additives restrictions);
    - Pyrolysis (chemical recycling), more communication materials under preparation;
    - Flooring (contributing to Ecodesign requirements), at the initiative of ERFMI.
- Pathway II – Advancing towards Carbon Neutrality and Minimising our Environmental Footprint – four ongoing technical projects on:
    - Decarbonisation PVC Value Chain, phase 1 is completed, now in the process of developing a model to help industries to decide on investments;
    - Training of ASF (Additives Sustainability Footprint), to show safe and sustainable use of additives in PVC, a training with 15 companies was conducted representing plasticisers and stabilisers;

- ECVM Charter, to show safety of our production plant; a third-party audit revealed that the compliance rate is 99.2%;
- TEPPFA commissioned the LCA consultancy Ecoinnovazione to develop two Life Cycle Inventory (LCI) datasets for rPVC products, to show collection of relevant LCA data for recyclates.

E. Nanni intervened during the presentation of the training of ASF to inform that one month ago ASF methodologies have been recognized as good practice and included into the ECESP (the European Circular Economy Stakeholder Platform).

Participants started an interactive conversation on PVC recycling, collection and sorting issues, deposit return systems, EPR schemes and their feasibility for PVC.

O. Pozlevic started asking what the main critical point is to recycle PVC from a technological point of view.

S. Content suggested to distinguish new products and old ones. In new products, legacy additives are not present so products can be easily recycled. Products containing legacy additives require specific detection and sorting technology, which is in the process of being developed. He suggested to also distinguish pre- and post- consumer recycling: while pre-consumer waste can be recycled fully, post-consumer waste is not always well sorted, investments are needed in collection centres. He made the example of PET bottles, for which an excellent sorting system is in place.

I. Verschueren agreed with S. Content on the need of better collection systems. She added that big quantities of PVC still end up in landfill or incineration. She stressed the need to track where post-consumer PVC waste ends up and increase the recycling rate. She made the example of the pipes: localizing them is essential to be able to replace the old ones. The PVC industry must make sure that what is easily mechanically recycled, is actually recycled.

C. Röber went back to the original question of O. Pozlevic about technologies for recycling. She explained that sorting is often needed due to regulatory pressure, if the product contains legacy additives, which need to be sorted out. Technically, there is need to invest more into separation technologies because the mix of different materials in products makes recycling difficult and decreases the quality of the output recylate. She outlined the need of further funds and research on separation technology.

O. Pozlevic recognized that within this group the collection issue has been discussed several times. She informed that recently she has been pushed by the agriplastics industry to establish collection systems, such as the deposit and return system in place for PET. Given that the Circular Economy Act is trying to improve collection, she asked for an opinion on the possibility for deposit and return systems to work for PVC as well, or if we have other suggestions.

C. Röber stated that it depends on the product: for example, for the construction industry is challenging to have a deposit and return system in place. She added that France has interestingly introduced a EPR scheme for building and construction.

O. Pozlevic expressed her doubts about EPR being the best instrument. Instead, she insisted that deposit and return systems could create more incentives to improve collection rates.

C. Röber posed then the question regarding long-lived products and wondered who would pay and return deposit for long life products.

G. Tillieux agreed with C. Röber and added that a general answer on the feasibility of deposit and return systems does not exist, especially if we consider products lasting decades, just like PVC.

M. Krusberg added that the main problem for waste collection is that few people and companies sort properly and the goal should be to incentivise them to act correctly.

C. Röber pointed that indeed companies now struggle to decide whether to invest on education and separate collection, or on sorting of mixed waste streams.

O. Pozlevic stated that data in the Circular Economy Act show a stagnating situation for waste recycling (general waste, not only PVC). Thinking out of the box is needed, she asked for feedback both for obligations and for incentives.

C. Röber referred to a presentation of a meeting VinylPlus had with our national representatives presenting an inspiring business model using only recyclates, adapting the business to products that can be made only with recyclates and not with virgin resin.

G. Tillieux agreed that this model is inspiring but construction materials are much more regulated by standards and this prevents to develop new applications. He concluded that more work must be done to implement collection and have more recyclates.

J. Dewulf added that the Circular Economy Act is not only about recycling, but also about longer time life for products, slowing and narrowing loops. He stressed opportunities for PVC products, given their long life in terms of contribution to the economy.

C. Röber agreed with J. Dewulf overall, the long life for PVC is the main characteristic of the material and should be underlined more. However, she pointed that despite this aspect always used to be an asset for the material, now can become a burden due to the legacy additives.

S. Content resumed the discussion on the projects and explained that the objective is to advise PVC sectors on the investments they can do to decrease their carbon footprint, and how the use of renewables can help in the decarbonization process.

O. Pozlevic introduced the topic of Water Resilience Strategy, and informed that it will be published very soon. She stated that DG GROW is trying to address the water footprint issue and asked for some materials.

S. Content informed that a study to assess water footprint reduction opportunities in the PVC value chain will be completed by December 2025 and VinylPlus will then share the results.

M. Krusberg suggested to replace in slide 11 of the Progress Report “DACH” with “Germany”.

Internal & External stakeholder engagement (All Pathways)

C. Röber presented the VinylPlus programme for internal and external stakeholder engagement across all Pathways. She explained that meetings with non-European delegations and the international PVC value chain and site visits happened. She underlined that sharing best practices is one of the main objectives. She finally asked for comments on the report to make the final adjustments.

No additional comments were raised, and the VinylPlus Progress Report 2025 was endorsed.

5. Update on the European PVC Value Chain

Post-consumer waste information project outline

I. Verschueren informed that Recovinyl revised its strategy, and a third new goal was established which is to facilitate the localization and recycling of post-consumer PVC waste. She explained that this represents a shift from solely monitoring and data collection to actively facilitate the localization and recycling of post-consumer PVC waste. She discussed about the project which started in March 2025 aimed at tracing PVC waste to recycle it. She precised that the project has a good geographical coverage, although countries where Recovinyl is not represented are more difficult to cover. In those countries, Recovinyl is trying to get in touch with some authorities and organizations to have some data. She anticipated that hopefully Recovinyl will be able to share some preliminary results in the next Monitoring Committee meeting in December 2025.

C. Röber added that in the past VinylPlus used to rely on consultancies to have reliable data on waste, while the goal now is to have those data itself. Upon request, she also confirmed that it would be good to make pre-demolition audits mandatory.

O. Pozlevic reassured that DG GROW works on making pre-demolition audits more helpful in returning waste for recycling.

Market update

S. Content gave an overview of the current economic situation in the EU and global PVC market. The main finding was that production of EU virgin resin is decreasing, while imports of resin is increasing. Overall the production of PVC products in Europe also slightly decreased. S. Content presented the causes of this drop, which include:

- uncompetitive prices,
- high costs for energy,
- low investment in building and construction (which represent 70% of PVC applications).

S. Content presented the situation for PVC in the European industry in the near future. He presented data from 2023 on the capacity of virgin resin, demonstrating overcapacity of virgin PVC production.

C. Röber remarked that up to now the core market for Chinese converted PVC products was the US, but due to recent US tariffs, this market is closed. Therefore, figures already show that the demand for Chinese products decrease which also causes production of these products in China to lower. This needs to lower demand for Chinese PVC resin. it is likely that some of the Chinese products and resin will now come to the European Union where the demand for these products is stable. She made the metaphor of a tsunami for the European PVC industry to describe a situation where the overcapacity of PVC resin in China and the overproduction of converted PVC products entails both an economic and

an environmental sustainability risk: Chinese regulation applying to the production of PVC and PVC products is different from EU regulation. Sustainability requirements are lower and price competition further drive EU producers out of the market.

She also mentioned the example of the textile sector to highlight the risk for delocalization of European PVC companies, from the EU to China. Increasing sustainability or control over a sector that has left Europe is even more challenging.

Participants started a discussion on customs controls.

E. Nanni highlighted the importance to control PVC finished articles entering the EU market, which are more difficult to be tracked than PVC resin.

D. Napierska confirmed that it is necessary to first effectively check imported goods when they enter the European market.

O. Pozlevic asked about clearer conclusions of the VinylPlus project checking REACH compliance of imported PVC floorings.

C. Röber explained that VinylPlus has not the means to focus on a large, representative project. Instead, VinylPlus focuses on imports flows overall to know what is being used in the Chinese market in terms of stabilizers and plasticisers.

Link to current EU initiatives

C. Braibant briefly presented the new internal structure of VinylPlus. She focused on the creation of the three Committees – Commitment, Communication and Advocacy – that will shape the work of VinylPlus explaining the interconnection between them. She detailed the objectives of the Advocacy Committee and dwelled on the Advocacy Committee meeting held last 23 April. She reported that the main outcome of the meeting was the need for dedicated task forces within the Advocacy Committee to tackle some key regulatory challenges, such as circularity, EPR, end of waste criteria and recycled content. She also described how the technical projects presented by S. Content will feed into the relevant Committee and help advocacy and communication about PVC. She finally listed and briefly described the most relevant legislative files for PVC.

Participants started a short conversation about waste shipment and the Digital Product Passport.

O. Pozlevic informed that the idea of the Circular Economy Act is to have a single market functioning well, the European Commission is trying to identify cases where it doesn't work and where we need to make efforts either by setting end of waste establishment or by improving the waste shipment.

D. Napierska asked when the Digital Product Passport will be available.

S. Content suggested that solutions for the PVC industry it could be available by 2027/2028, but precised that some sectors are more advanced than others, such as flooring and construction in general.

C. Röber stepped in, precising that VinylPlus looks at one element covered in the Digital Product Passport, which is the recyclability (and potentially the recycled content requirement). She pointed that information and technologies still need to be defined, so the timeline could change.

Then C. Röber went back to the agenda point and described the state of play of the first 5 years of the Commitment of VinylPlus, referring to materials participants received ahead of the meeting. She informed that last 16 April 2025 the Commitment Committee kicked off the work and created a task force dedicated to the revision of the Commitment, and a first draft is foreseen for beginning of Q3. At the end of Q3, stakeholder workshops are foreseen to collect input on what other things the PVC value chain should focus on. The plan is to have a revised Commitment in early 2026. She precised that the targets will be revised, not the entire structure and programme.

No comments or questions were raised.

6. VinylPlus Sustainability Forum

Concept & Programme

S. Famelart invited all to register and attend the VinylPlus Sustainability Forum 2025 (#VSF2025) which will take place next 21-22 May in Paris, France, with the theme "For a future-proof value chain". She presented the event's themes and structure, explaining that Day 1 foresees interactive sessions and debates organized in several round tables. Day 2 will feature four sessions on circularity, competitiveness, societal purpose and a final ceremony to congratulate the 11 companies who resulted compliant with the certifications.

7. Wrap up

Right before the wrap up, O. Pozlevic made a short point on the resilience of the EU industry and the public procurement to improve it, a topic included in the Circular Economy Act. Since PVC is involved in the construction sector, which is covered in the public procurement, she asked if the "made in EU criteria" could be helpful to the industry.

C. Röber informed that this discussion is still ongoing.

O. Pozlevic anticipated that there will be a public consultation on the Circular Economy Act in the summer (June/July 2025) and she will keep us informed so we can share our opinions.

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

- The next meeting of the Monitoring Committee will be on December 2, 2025 at 14:00.
- Stagnating recycling situation, thinking out of the box is key.
- Circular Economy Act may be more than just about recycling.
- More proactive attitude on what is available for recycling.
- Tsunami for PVC entails economic and environmental issues.