

Recycling Europe:
**Who we are,
what we stand for
& why it matters**

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A key industry for Europe's future.

Recycling Europe (formerly EuRIC), is the voice of Europe's recyclers, representing 83 national federations and companies across 25 countries in Europe.

From metals and paper to plastics, textiles, tyres, ships, construction & demolition waste, e-waste and End-of-Life Vehicles (ELVs), our members transform waste into high-quality resources, contributing to Europe's competitiveness, industrial resilience, decarbonisation and strategic autonomy.



83
members

NATIONAL
FEDERATIONS
AND COMPANIES

25
countries

ACROSS
EUROPE

€95bn
contribution

TO THE EUROPEAN
ECONOMY

Over
2 million
jobs

ACROSS THE
VALUE CHAIN

Our members collect, sort, dismantle, process and recycle end-of-life products and equipment, supplying high-quality recycled materials to European industry and keeping resources in use for longer, making circularity happen in practice.

Across metals, paper, plastics, textiles, tyres, construction materials, ships, End-of-Life Vehicles (ELVs) and e-waste (WEEE), they operate the plants, technologies and processes that make material circularity possible at industrial scale.

They are industrial companies that invest in plants, machinery, technology and skilled workers, generating millions of green and local jobs across Europe. They purchase and process inputs, meet strict specifications and quality requirements, and generate materials and products that are used by European industry, being an indispensable part of Europe's industrial base and raw-material supply.

In a world of intensifying competition for materials and increasingly volatile trade relations, Europe cannot base its strategic autonomy on the assumption that global supply will remain cheap, open and predictable.

Recycling offers Europe something increasingly valuable: a source of materials already within its own economy. Every tonne successfully recovered and returned to production reduces, to some degree, the need to extract, produce or import virgin resources and helps limit Europe's exposure to external supply shocks.

Europe is increasingly designing industrial policy around circularity: recycled and locally sourced content targets, green public procurement, product design requirements, investment support, end-of-waste criteria and incentives for low-carbon and circular production.

If policymakers do not understand where recycling actually occurs, policies risk supporting the wrong point of the value chain.

A policy intended to strengthen European recycling capacity should reach the industrial companies investing in recycling plants, technologies and processes. A measure intended to stimulate demand for recycled materials should recognise the manufacturers purchasing and using those materials.

A recycling target should measure recycling. An end-of-waste framework should enable recycled products and materials to circulate across the Single Market.

And industrial policy should recognise recyclers as part of Europe's industrial base, rather than treating them merely as service providers managing somebody else's waste.

This means that recycling companies must also benefit from supportive state aid in order to offset competitive disadvantages vis-à-vis competitors in third countries. Like energy-intensive industries, recyclers face high energy costs and reporting obligations, which must be addressed.

To strengthen the continent's circular economy, the EU must also strengthen the industry that puts materials back into circulation.

To design effective circular economy policy, Europe needs clarity about **what recycling is, where it happens and who actually performs it**.

While the technologies and the materials differ, the principle, however, remains the same: **Recycling takes products or equipment that has become waste and reprocesses it so that it can return to productive use**.

As **circularity becomes increasingly central to European industrial policy**, the concept of recycling is being stretched across the value chain. Waste management companies and manufacturers can all contribute to circularity. Some can and do perform recycling operations.

But contributing to a circular value chain does not automatically make every activity recycling. One of the biggest misconceptions about recycling is that recyclers merely collect or prepare waste for another industry to actually recycle it. That does not reflect how many recycling value chains exist. Very often, the operations of recycling companies can produce materials and products in their own right. In several value chains, the output fraction leaving a recycling operation has ceased to be waste.

Recycling transforms waste into materials that can be used again in industrial processes, regardless of whether they have formally achieved end-of-waste status. Where applicable, harmonised end-of-waste criteria can further facilitate the circulation and use of recycled materials across the Single Market. All this matters now because Europe increasingly wants to build industrial policy around circularity.

If we want recycled-content targets, strategic autonomy, resource security and stronger markets for recycled materials, Europe must

know which industrial operators actually produce those materials. It is also important to ensure well-functioning markets, including maintaining export opportunities as an outlet for recycled materials when supply exceeds demand within Europe.

Otherwise, support intended to build recycling capacity risks being captured elsewhere in the value chain.

For too long, recycling has been approached primarily through the lens of waste management. That perspective is increasingly inadequate for an industry that produces raw materials, competes on international markets and supplies European manufacturers. As the EU prepares its next generation of circular economy legislation, it has an opportunity to correct this. Not by expanding the definition of recycling to accommodate every activity along the value chain, but by **recognising the industrial operations that actually turn waste into new materials**. Getting that distinction right is a prerequisite for getting the policy right.

This is why Europe needs Recycling Europe.

As recycling moves to the heart of Europe's industrial, economic and environmental ambitions, the companies that make it happen must have a **strong and credible voice** in the decisions shaping their future.

Recycling Europe brings together the expertise, experience and industrial realities of recyclers across the continent, ensuring that their interests are represented and their voices heard in Brussels and European capitals. **Europe's circular ambitions can only succeed if the industry expected to deliver them has a seat at the table.**