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China's ban on plastic waste – Opportunities among the uncertainty

In 2017, Chinese manufacturers and recyclers imported 7.3 million tons of plastic waste, accounting for 56% of the world imports in that category and making China the world's largest importer of plastics collected for recycling. However, last July, China notified the World Trade Organisation (WTO) that it will ban imports of 24 categories of solid waste including almost all categories of plastic resins as of January 2018. Although it is not the first time China has taken action to strengthen its policy on waste imports (i.e. 'Green Fence' initiative in 2013, 'National Sword' initiative in 2016), the ban has caused a great deal of disruption in the global recycling industry.

The United States were the biggest contributors to China's plastic waste imports, Europe used to export half of its collected and sorted plastics, 85% of which went to China. The UK used to send about two third, Ireland even 95% of its plastic waste to China. Thus, hundreds of containers full of foreign waste are prevented from entering the country and have nowhere to go, especially since domestic infrastructure in many European and North American markets is largely saturated and substitute markets such as Southeast Asia or India, who could fill the void in the long term, do not yet have sufficient recycling capacity. In the short term, a build-up of waste seems inevitable as the recycling industry didn't have much time to adapt, which may lead to much of the material going to landfill or to incineration. The ban could also have an impact on national and regional recycling schemes, as there may be a cut back on the list of accepted materials because major investments in enhanced sorting and recycling facilities would be necessary to deal with the surplus of plastic waste, especially for the lower-quality material previously sent to China.

However, besides the potential effects in the short term, China's actions to reduce waste imports and improve domestic collection and recycling are actually consistent with the EU's new recycling targets. On 16 January 2018, the European Commission published a communication laying out a strategy for plastics in a circular economy. The strategy identifies key challenges, including the low reuse and recycling rates of plastic waste, the greenhouse gas emissions associated with plastics production and incineration, and the presence of plastic waste (including microplastics) in oceans. The Commission depicts its vision for Europe's new plastics economy, where among other things, all plastic packaging will have to be recyclable or reusable in an economically viable matter by 2030. Separate collection of plastics waste should reach very high levels due to a significant extension of EU plastics recycling capacity and a proposal for single-use plastics is expected for May 2018.

As a matter of consequence, big changes are on the way, not only for recycling businesses but also for manufacturers and consumers of plastic packaging and products. Beijing's ban on plastic waste imports may have brought some uncertainty for the actors of the global recycling industry in the short term, but it may become a key opportunity in the long term to strengthen the European recycling industry, to keep the materials in the domestic market and ultimately, it may become an accelerator for the transition towards a more circular economy within the EU. It may lead to a re-thinking of existing collection systems and it may be beneficial for recyclers who have invested in pollution control and other technologies to make their recyclables clean, allowing them to operate at a more equal and fair-cost level. But innovation alone is not enough. The framework that will come up under the EU's vision for a new plastics economy will need to support a combined industry- and government-led approach that includes 'demand-pull' measures and investment in infrastructure to open up new markets.

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