



Latest News Regarding Dual-System Market Conditions – 24 March 2015

Q2 quantity reports published: another increase in licensed quantities for the dual systems

The licensed quantities reported for the dual systems have also increased in the 2nd quarter of 2015, thereby continuing the positive trend of the past months. Accordingly almost 405,000 tonnes were registered with the clearing body in the lightweight packaging fraction in Q2. Compared to Q1 reports, this indicates an additional increase of approximately 95,000 tonnes. For the first half of 2015 the systems reported a cumulative volume of nearly 714,000 tonnes of lightweight packaging. The projections for the whole year point to a volume of about 1.4 million tonnes.

Volume increases can also be seen in the paper and cardboard material and glass fractions. Consequently, the registered quantities for paper and cardboard materials amount to more than 325,000 tonnes (+ 84,000 tonnes compared to Q1) and approx. 519,000 tonnes for glass (+ 50,000 tonnes compared to Q1).

Planmengen dualer Systeme 1. und 2. Quartal 2015												
(Mengen in t)	LVP				PPK				Glas			
	1. Quartal		2. Quartal		1. Quartal		2. Quartal		1. Quartal		2. Quartal	
DSD	46,24 %	142.901	38,03 %	153.896	46,55 %	112.593	35,52 %	115.596	43,27 %	203.010	42,36 %	219.949
Interseroh	7,40 %	22.869	7,21 %	29.177	6,94 %	16.786	7,83 %	25.482	6,51 %	30.543	6,13 %	31.829
Landbell	3,06 %	9.457	4,23 %	17.118	1,79 %	4.330	4,88 %	15.881	2,44 %	11.448	3,68 %	19.108
Redual	9,10 %	28.123	17,86 %	72.274	12,41 %	30.017	20,24 %	65.869	0,00 %	0	0,00 %	0
Vfw	0,00 %	0	0,00 %	0	0,00 %	0	0,00 %	0	13,85 %	64.980	16,21 %	84.168
Belland Vision	18,81 %	58.131	14,81 %	59.932	17,52 %	42.377	12,83 %	41.754	22,60 %	106.032	20,05 %	104.107
ELS	1,94 %	5.995	3,75 %	15.175	3,62 %	8.756	6,94 %	22.585	3,36 %	15.764	5,10 %	26.481
Zentek	4,04 %	12.485	4,65 %	18.817	6,25 %	15.117	5,51 %	17.932	1,76 %	8.257	1,65 %	8.567
Veolia Dual	0,09 %	278	0,11 %	445	0,41 %	992	0,37 %	1.204	0,17 %	798	0,21 %	1.090
RKD	9,32 %	28.803	9,35 %	37.837	4,51 %	10.909	5,88 %	19.136	6,04 %	28.338	4,61 %	23.937
100%-Menge	100,00 %	309.043	100,00 %	404.670	100,00 %	241.875	100,00 %	325.439	100,00 %	469.170	100,00 %	519.238

Quelle: Duale Systeme – Stand 18.03.2015

Source: EUWID – Recycling und Entsorgung, issue no.13, 2015



Reclay Vfw GmbH was also able to boost their quantities. This is primarily a result of contracts that were secured with large clients following Q1 reporting. The Reclay market shares are as follows:

Lightweight packaging fraction: 17.86 % (72,274 t in total (+44,151 t compared to Q1))

Paper and cardboard materials fraction: 20.24 % (65,869 t in total (+35,852 t compared to Q1))

Glass: 16.21 % (84.168 t in total (+19,188 t compared to Q1))

The repeated increase clearly shows that the dual system management of packaging waste, operated by the private sector, is now on stable ground as a result of the measures taken last year. Now the market needs to be consolidated, and strengthened in terms of implementation and control mechanisms. The Reclay Group is actively contributing towards a continued market stabilisation, having already presented its own proposals to this effect. These include a model for implementing the resolutions agreed upon in January, 2015, by the *Bund/Länder-Arbeitsgemeinschaft Abfall* (LAGA) in order to pass the resolution in the so-called *Gemeinsame Stelle*, a coordination body.

Recycling Law / Central Body

Meanwhile, the *Bundesumweltministerium* (Federal Environment Ministry) is taking its time drafting a Recycling Law. Among other things, the law is intended to raise the recycling rates, expand product responsibility to so-called non-packaging from similar materials as well as establishing a central body that will ensure the appropriate regulation, control and enforcement in the future. Although its completion had



originally been announced for autumn last year, political circles are now saying a draft will be presented at the end of April/beginning of May.

Independently of this development, the German Retail Association (HDE), the Association of German Food and Drink Industries (BVE), the German Association for Plastics, Packaging and Films (IK) as well as the German Trademark Association have recently teamed up to establish a *Zentrale Stelle GmbH*, a limited company serving as a central body. The structure of this body is currently being developed. The four Associations view the limited company as the organisational predecessor to the anticipated central body to be created within the framework of the planned Recycling Law.

In principle, we welcome the fact that the Associations have taken the initiative in advance of the prospective Recycling Law. Nevertheless, the legislative authorities reserve the sole right to determine the final structure and functions of such an organisational body, of course. In doing so, it is essential that the legal provisions included in the draft ensure an indiscriminately neutral performance of tasks. This applies all the more, as the current stance in the discussion points towards a plan to grant the power to the public authority, which is designed to ensure an effective enforcement – similar to the national register for waste electrical equipment (*Stiftung EAR*), in accordance with the Electrical and Electronic Equipment Law. Insofar, it is becoming apparent that ultimately the responsible organisation will take on the legal structure of a foundation, into which the *Zentrale Stelle GmbH*, meanwhile created by the associations, will need to be transferred.