PRESS RELEASE

18th July 2025

EuCIA highlights the untapped potential of Europe's composites recycling market

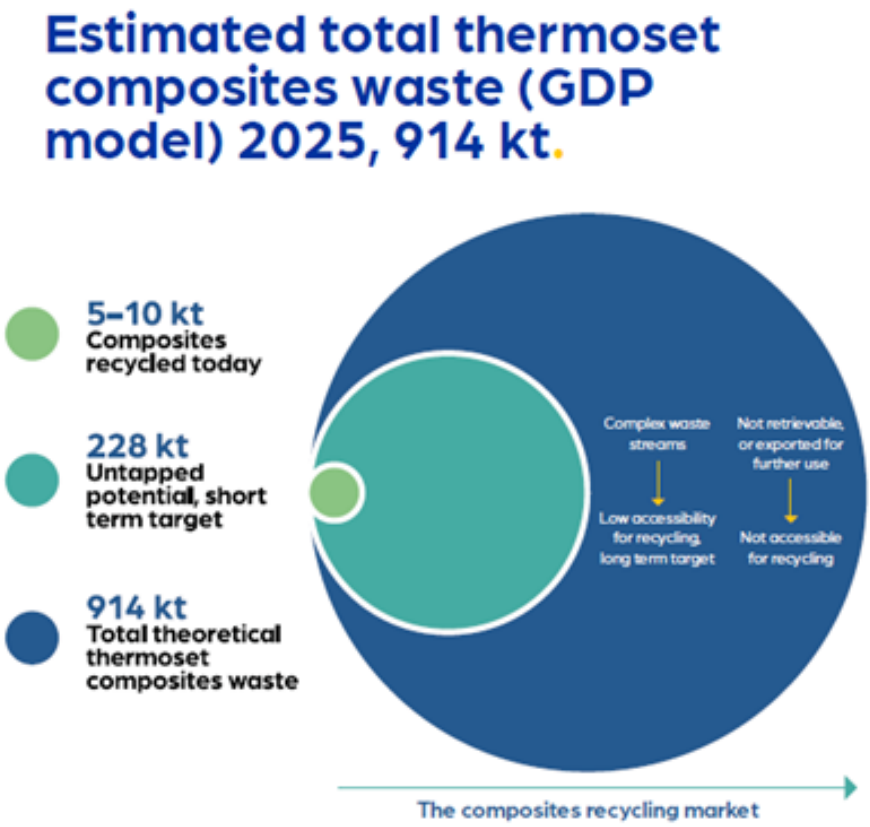
While the amount of composites waste is a small compared to plastics, aluminium and other popular materials, Europe's transition to a circular economy makes sustainable waste management essential. To inform policy development and infrastructure planning the European Composites Industry Association (EuCIA) has estimated the volume of thermoset composites waste accessible for recycling. This data will also support the activities of the new European Circular Composites Alliance (ECCA).

The effective management of end-of-life (EoL) composites requires accurate data on the waste volumes. However, the amount of composites waste generated in Europe is not officially monitored. EuCIA has therefore been collaborating with its members and partners to estimate the potential size of the composites recycling market.

EuCIA has developed a model based on the gross domestic product (GDP) of European countries which predicts a total volume of thermoset composites waste of about 914 kt in Europe in 2025. In reality, the situation is more complex and the volume currently accessible for recycling is much lower for several reasons:

- Some composite components (e.g. wind turbine blades) are exported for reuse outside of Europe.
- In many cases, composite parts are embedded in infrastructure that cannot be easily retrieved for recycling, such as underground pipes and tanks.
- Collection and sorting systems tailored to recycling composites are limited and therefore a large number of end-of-use composite products are not collected.

EuCIA therefore conducted a deeper analysis per market, taking into account a number of factors, including the existence of established collection and recycling routes. This indicates that the actual volume of thermoset composites waste accessible for recycling is likely to be around 228 kt in 2025, approximately 25% of the theoretical amount predicted by the GDP waste model. Of this, we estimate that currently a maximum of 5% is being recycled.



These figures clearly show an untapped resource that could potentially be returned to the value chain. Exploiting this opportunity will require the building of a robust European value chain and infrastructure to enable reuse and recycling of composite materials. Longer term, establishing systems to enable more widespread collection and sorting of composites waste will be key to fully realising a circular economy for composite materials.

Further information, including estimates of the size of the composites waste streams generated by different market sectors, is available in the new publication *Reimagining end-of-use composites as a new resource.* This is available to download from the EuCIA Knowledge Hub: https://eucia.eu/knowledge-hub/sustainability.

Mobilising investment into recycling

This waste data will input into the activities of the new European Circular Composites Alliance (ECCA), which aims to identify and resolve the legal, economic and technical barriers to composites recycling. The alliance will recommend essential policy updates, such as the creation

of dedicated waste codes for EoL composites, to enable the scaling up of sustainable composites recycling solutions. It will also promote the building of markets for secondary (recycled) composites.

The ECCA is a sectorial alliance of EuCIA, launched in partnership with JEC in March 2025. All stakeholders are invited to join the alliance to drive collective action and build a circular and competitive future for Europe's composites industry. The first meetings of the ECCA Working Groups will take place in August.

"The collaboration of Europe's composites stakeholders is essential to achieve the full circularity of composite materials," states Raphaël Pleynet, EuCIA's Managing Director. "ECCA members will commit to this goal, working together to fully establish the circular economy for composites by implementing strategies for greater reuse, repair, repurposing and recycling, and setting and delivering on targets for the recycling of existing products."

For further information about the ECCA, and how to join, please visit https://eucia.eu/ecca.

About EuCIA

The European Composites Industry Association (EuCIA), headquartered in Brussels, represents European national composites associations and industry-specific sector groups at EU level. With the support of its members, EuCIA actively contributes to building an economically and environmentally sustainable European composites industry. Our initiatives aim to ensure the healthy growth and continued competitiveness of more than 10,000 companies and an estimated 150,000 employees involved in composites manufacturing across Europe.

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