by BARRY KEELING

Looking back at the development of plastics recycling in the UK over the past decade we see, on the face of it, a fairly continuous increase in recycling levels, albeit from a very low base.

That picture of progress, while being very positive, hides however a number of key issues which, if not addressed, will impact on our industry for years to come and come back to haunt government, both local and national.

The first of those issues has been the export of waste plastic, initially to China but now to India and other destinations, mainly thirdworld.

That was allowed to operate without adequate policing, indeed positively encouraged by the introduction of export PRNs.

The ease of accessing and the value of these EPRNs, plus the almost limitless number of containers going back empty to China, enabled exporters to outbid UK reprocessors for virtually all materials. Next came quality, really the key issue in this article.

Many exporters advised waste plastic sources, such as local authorities, material reclamation facilities and the many large commercial organisations, that there was no need to sort their materials to the thenexisting levels because export markets would pay top prices without this extra effort.

The result has been dramatic. Plastic film is no longer being sorted by polymer but is measured by the percentage of natural to colours. That leaves LDPE, PP and PVC mixed in bales, with only a third-world destination able to handle it economically. Plastic bottle sorting virtually disappeared, with mixed bales being in almost limitless demand from China and up to 80% of UK collections being exported.

Overall we have enjoyed the worst consequences possible. Prices have risen while quality has deteriorated, and progressively less material has been processable in the UK.

Going back to the comments made at the beginning; recycling levels have increased, or at least diversion levels have increased. Within this progressive situation, however, has been the year-on-year rise in exports and exporters, while our own UK-based reprocessing capacity has fallen.

The inevitable then happens, with the main export market – China – becoming more discerning in its requirements, progressively moving to eliminate mixed plastic imports and seeing the UK as a ‘low quality’ source, likely to be dropped if demand softens.

The good news is that government and its appointed agencies have woken up to the situation and are now working to develop and increase UK reprocessing capacity.

We are, though, still faced with the export-created quality issue, coupled with local authority demands to collect mixed plastics and not just bottles.

We find ourselves at a crossroads: we either enforce a regime of segregation, where the waste generators have to meet agreed sorting standards or we support the introduction of a sorting element into the plastics recycling industry, leaving the waste generators able to collect mixed polymers.

This second option is already happening, with a number of the larger exporters now launching sorting facilities. While this has clearly been driven by the need for better quality to maintain exports, it at least offers the prospect of reasonable material being available to UK reprocessors.

At the same time WRAP is supporting the new ‘bottle-to-bottle’ initiatives, and now showing much more interest in UK reprocessing capacity.

All this adds up to the UK losing a decade of industry growth, exporting both materials and jobs with little control, and only waking up to the situation at the eleventh hour.

While this is a tale of declining quality and lost opportunity, the situation is actually recoverable, indeed extremely positive. The fact that we have lagged behind other countries in recycling has also meant that our market is largely untapped and not overly damaged by poor first-generation recycled plastic products.

We must now rapidly take the steps required to remedy the quality issues, develop our UK based industry and avoid the next problem, where recycled plastic imports flood in, capturing the bulk of this potential market growth because of inaction within the UK. Key actions will have to include:

* Continuing to support market growth by encouraging, even regulating, local authority, central government, the construction industry and the large land management groups to specify and to achieve percentage inclusion targets for recycled plastic products.

* Resolving the issue of quality by encouraging local authorities and their waste contractors to sort more effectively, or by supporting the emergence of ‘sorting centres’. Either way, standards need to be introduced optimising the recycling option.

* Applying a level of control to exports consistent with that applied to UK reprocessors, enabling a more balanced and fair market to develop. Certainly not rewarding exporters with an easy payment, giving them a competitive advantage over our own industry.

* Basing future support for reprocessor capacity growth on credible business plans, rather than supporting the haphazard emergence of various ‘not for profit’ organisations who distort the market and lower quality levels.

* Recognising the opportunity in the fabrication and construction industries that recycled plastic

brings and aiming very specific support in this direction.

To conclude, we’ve made many mistakes in the UK: we’ve allowed a ‘free-forall’ to develop and done nothing to develop our own infrastructure. We are, however, sitting at the start of what most industryinsiders see as a period of significant growth. If we make the right decisions going forward, we could be looking at a major new industry, with all the economic and environmental benefits that would follow.

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