

PRESS RELEASE

The chemical recycling industry is at a pivotal point in a volatile market environment

AMI, Bristol, 13/10/2022 – AMI has published its 2nd authoritative report on the global Chemical Recycling Industry. New in this edition, the report provides a comprehensive global directory of 181 chemical recyclers and their 449 sites, including headquarter and site level information on

- existing and planned capacities to 2030,
- technologies used,
- types of post-use plastics processed,
- feedstock sources and sourcing models,
- operational details, and
- outputs of the chemical recycling process.

In a unique approach to the industry, chemical recyclers are placed within a value chain context, with the interactive report format mapping industry relationships across the value chain. This allows users to gain a clear understanding of the developing complex partnerships and interactions within the industry and across the wider petrochemical and plastics processing landscape.

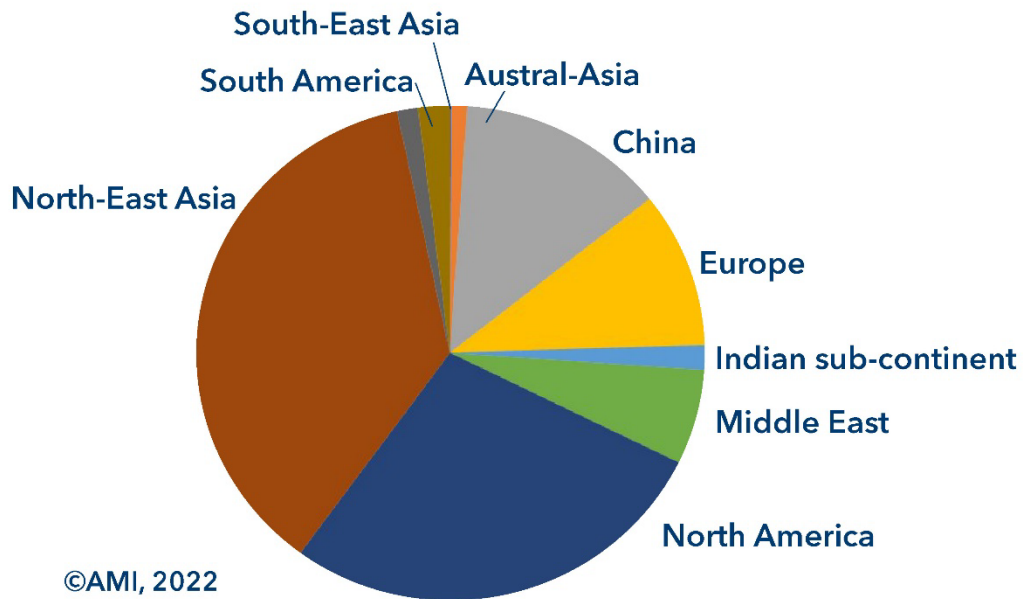
Chemical recycling technologies and concepts of key importance for the industry, such as the mass balance approach, are explained, together with a discussion of the key issues of potential competition of chemical recycling with mechanical recycling, and feedstock sourcing. An overview of regional differences in waste management, collection and sorting illustrates the potential for the development of the industry in 10 global regions.

The report identifies a global chemical recycling input capacity of close to 1.2 million tonnes in 2022, excluding facilities processing post-use plastics into fuels. Europe is at present considered to be at the forefront of technological developments in chemical recycling. Over coming years, developments in North America are, however, forecast to accelerate at a faster pace.

Approaching the last quarter of 2022, the chemical recycling industry has reached a significant threshold. Following many years of developments and announcements the first commercially active facilities are operating, and a significant number of plants are scheduled to start fully commercial operations imminently and during 2023. Even larger capacities are in the pipeline and scheduled to become operational during the forecast period to 2030.

Across the industry, there appears to be the perception that the time has come to deliver on the multitude of announcements made over recent years. Supply chain partners and investors are keen to see facilities starting fully commercial operations, proving that the relevant technologies can be

FIGURE 1: Chemical recycling input capacity 2022



AMI | Market Report: Chemical Recycling - Global Status 2022

scaled up to operate in an efficient and financially viable manner in the long term. Evidence that they can do so is, in many cases, still outstanding. The same applies to claims relating to carbon footprints, energy efficiency, risks to human health, and environmental externalities.

A particular concern is that investments into what is a capital-intensive industry will potentially divert attention away from reducing virgin plastic production and plastic waste generation by creating a ‘lock-in effect’ to an industry and supply chain that relies on a growing stream of waste plastic material for its operations.

It is for the chemical recycling industry to show, verified by independent third-party bodies, that it can deliver on its claims and promises without creating these lock-in effects, and by operating as a complementary technology to mechanical recycling, itself an industry characterised by innovations and advancements for the processing of a growing range of post-use plastics.

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**We are exhibiting at K2022
 Hall 7, Stand C11**