BKV PLASTICS CONCEPTS RECOVERY

Report 2025/2026

Thinktank and competence center of the **PLASTICS INDUSTRY**

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BKV – THINK TANK AND COMPETENCE CENTRE OF THE PLASTICS INDUSTRY

The BKV compiles data and facts on the topics of resource efficiency and the circular economy of plastics, and makes this information available, without discrimination, to interested market players and users.

ENVIRONMENTAL TOPICS

The BKV offers its expertise on environmental issues with regard to the use and recycling of plastics, irrespective of the particular application.

DATA AND FACTS

The BKV has a broad network of experts, whom it can draw on.
The solid data basis is valued by many users and is widely acknowledged.

VISIBLE PRODUCT RESPONSIBILITY

The BKV is thus a visible part of the producer responsibility of the plastics industry. Its shareholders are coming from the sectors of plastics producers, plastics converters and plastics machinery manufacturers.

MATTHIAS STECHHAN

LYONDELLBASELL, DIRECTOR POLYOLEFINS SALES EUROPE NORTH, CHAIRMAN OF THE BKV ADVISORY BOARD

The German plastics industry finds itself under mounting pressure from the global markets, from structural location disadvantages in Germany and from undiminishing bureaucracy in Europe. As a consequence of growing concerns within the plastics industry and downstream value chains, sustainability targets are increasingly being postponed or skipped. On top of this is the currently high level of uncertainty due to geopolitical conflicts, which call into question all the existing forecasts for the year 2026.

Nevertheless, in an increasingly challenging environment, the demands regarding sustainability, raw material supply and circular economy in Europe will remain. For this reason, the BKV is operating with its core topics of environment, resource efficiency and circular economy. Precisely on these subjects the BKV will continue to produce studies and projects successfully and reliably, in order to create a relevant fact-related basis. The studies from the last business year dealt, among other aspects, with the requirements for recyclability, the use of recyclates in accordance with packaging and end-of-life vehicle regulations, and the global plastics flow.

The fact basis in these fields is both a matter of principle and also a necessity to generate decision guidance not only for the industry but also for politics, administration and science. Through this, it is possible to support a practicable implementation on the market and, at the same time, shape the transformation of our economy to make it sustainable for the future. The strengths of the associations and the companies from the plastics value chain – i.e. plastics producers, plastics converters, recyclers and plastics machinery – that are necessary for this are grouped together at BKV under a joint roof. This is still a unique model of success in Europe.

Finally, the results of the studies and projects are presented and discussed at various specialist events and conferences. Highlights here are the contributions to the K, the world's leading plastics fair, and the BKV Symposium, which again took place at a Bundesländer representation in Berlin, this time at the representation of Saarland.

The BKV has also set itself the goal of carrying out numerous projects in 2026: The German plastics flow is being updated, various studies have been launched in the key sectors packaging, automotive and electrical/electronics, and a symposium is again planned in Berlin for the beginning of November. Through its focussed work, also in difficult times, the BKV has become a benchmark with its competence and expertise, which is recognised and also demanded by authorities, science and industry.

DR. INGO SARTORIUS

MANAGING DIRECTOR OF BKV GMBH

The transformation to a competitive plastics industry oriented to the circular economy calls for a high degree of change. With its studies, the BKV offers, through reliable and practical data and facts, a useful orientation for interested groups both inside and outside the industry.

In this year's activity report, the managing directors of the associations – Plastics Europe Deutschland, GKV and VDMA – each present brief statements in the context of the current situation within their environment. Here, the BKV is an important interface for the industry.

Also in 2026, we are addressing the current challenges presented by the further tightening legal rules through our projects, for example in the automotive, electrical and packaging sectors. Here, major aspects are: producer responsibility, product conformity, use of recyclates, material quality etc. For these projects, BKV is standing by as a competence team with its experts and its expertises.

DR. CHRISTINE BUNTE

PLASTICSEUROPE DEUTSCHLAND E. V.

DR. CHRISTINE BUNTE IS THE MANAGING DIRECTOR OF THE PLASTICS PRODUCERS' ASSOCIATION PLASTICSEUROPE DEUTSCHLAND E.V. THE ASSOCIATION IS PART OF THE PAN-EUROPEAN ORGANISATION OF PLASTICS EUROPE AND REPRESENTS WITH ITS MEMBER COMPANIES OVER 90 PERCENT OF PLASTICS PRODUCTION IN EUROPE, RELATED TO EU-27+3 INCLUDING NORWAY, SWITZERLAND AND THE UK.

The plastics producing industry is at the beginning of the plastics value chain, whereby especially the raw material supply and its competitiveness in Germany and in Europe in relation to the global environment are facing immense challenges. How can a future-looking transformation to a circular economy succeed against this background?

The German plastics production is in a deep structural crisis. Since 2021, production has slumped by more than 26 percent although the demand for plastics is continuing to rise globally. High energy costs, especially since the war against Ukraine, growing bureaucratic regulations and increasingly tough international competition are putting the companies under massive pressure. China is consistently expanding its fossil-based and its recycling capacities, trade conflicts channel additional volumes to Europe, while the location-related conditions in Germany are becoming ever worse. This is putting a brake on investments and endangering the long-term competitiveness of the industry.

At the same time, the geopolitical situation shows how vulnerable Europe can be as an industrial location, and how dependent we are on external supplies of raw materials. A reliable and competitive supply of raw materials thus becomes a strategic challenge. Precisely this presents a major opportunity for the plastics industry: Any company that keeps plastics within its life cycle instead of burning or exporting them strengthens the reliability of supply, the resilience and the added value in their own economic region.

The circular economy has thus been more than an environmental policy for some time now. It is a key module of modern industrial and raw material policy. For a continent low in raw materials like Europe, competitiveness and circular economy go hand in hand. At the same time, other regions of the world are catching up quickly from a technological point of view. It is therefore vital that Europe utilises its innovative force and moves fast when expanding the circular economy.

For this, measurable progress is needed along the entire recycling chain. Mechanical and chemical recycling are not opposites but complement each other. Together, they enable much larger volumes of plastics to be recovered in high quality – also from waste flows that have so far been difficult to recycle. Especially chemical recycling can thus make an important contribution to the supply of raw materials for plastics production.

For these technologies to reach an industrial scale, reliable market and investment incentives are needed: ambitious but realistic recycling and recycled content targets, an effectively extended producer responsibility, incentives in public procurement and, above all, EU-wide legal reliability in the recognition of mass balances.

The basis for targeted political decisions is a reliable fact base. Studies like those of the BKV are indispensable for this. They help to recognise risks early, to evaluate potential realistically and to quantify the actual demand for action based on facts – for example, in the availability of recyclates or the expansion potential of new recycling technologies.

In the transformation, it is generally true to say that pragmatism comes ahead of perfection. Not every rule must be complete from the very beginning. The decisive factor is to get into action and to learn from the implementation. We cannot afford to wait for perfect solutions.

DR. OLIVER MÖLLENSTÄDT

GERMAN ASSOCIATION OF PLASTICS CONVERTERS

DR. OLIVER MÖLLENSTÄDT IS THE EXECUTIVE DIRECTOR OF THE GKV – THE GERMAN ASSOCIATION OF PLASTICS CONVERTERS. AS THE UMBRELLA ORGANISATION OF THE PLASTICS CONVERTING INDUSTRY, THE GKV REPRESENTS THE COMMON INTEREST OF ITS MEMBER ASSOCIATIONS AVK (REINFORCED PLASTICS), EPPA (WINDOW PROFILE SYSTEMS), FSK (POLYURETHANES AND FOAM PLASTICS), IK (PLASTICS PACKAGING AND FILMS) AND PRO-K (LONG-LASTING PLASTICS PRODUCTS AND REUSABLE SYSTEMS).

The plastics converting industry currently finds itself in an economically difficult and politically demanding environment. What approaches has GKV developed to make itself capable of facing the future against this background?

The economic situation of the plastics converting companies in Germany continues to be tense in 2026 after several years of declining turnover. Nevertheless, the business climate in many companies has slowly been brightening up at the beginning of the year. Particular challenges for the primarily medium-sized companies of our branch of industry in Germany are the level of bureaucracy, the environmental regulations as well as high wages and subsidiary wage costs. Furthermore, many companies simultaneously have to cope with various transformation processes, which we have put together in a „transformation map". These are in particular the change to a resource-saving circular economy, the implementation of EU requirements for chemicals and microplastic with the aim of achieving a non-toxic environment, and the development of strategies for electricity-intensive plastics conversion in connection with the expansion of renewable energies and climate protection.

With regard to the circular economy, European legal requirements concerning waste, product and material legislation play an important role. Plastic converters are familiar with these and must take them into account. However, assessments regarding development in raw material markets also play an important role. In addition to this, political strategies such as the national circular economy strategy set priorities and provide orientation, especially also for promoting innovation.

The extension of restrictions in chemical legislation and the creation of new legal rules to avoid the discharge of microplastic particles – including plastic pellets – into the environment are presenting many companies with the task of identifying early potentially affected materials in the conversion process and developing adaptation strategies. Environmental management systems and certifications need to be readjusted.

The energy transition offers electricity-intensive companies an opportunity to contribute directly to climate protection, on the condition that the energy mix is suitable. Strategic decisions by plastics converting companies in this field are primarily to safeguard their own energy supply. These strategies must, in addition to technology development, also take into account the development of legal energy regulations (EEG, EnEfG etc.) and of complex funding and support regimes (industrial network charges, special compensation scheme, industrial electricity price). For the vast majority of medium-sized companies in plastics conversion, this is a demanding task.

The BKV GmbH contributes with its studies and analyses to the success of the transformation tasks of the plastics value chain, and provides, for key aspects of the transformation, basic data and results of investigations for effectively representing the interests of our industry. In addition, the information provided by the BKV is also available as useful basic information for the strategy development of the companies in the industry.

THORSTEN KÜHMANN

TRADE ASSOCIATION OF PLASTICS AND RUBBER MACHINERY IN THE VDMA

THORSTEN KÜHMANN IS THE MANAGING DIRECTOR OF THE TRADE ASSOCIATION OF PLASTICS AND RUBBER MACHINERY IN THE VDMA. THE ASSOCIATION IS INVOLVED IN EUROPEAN AND GLOBAL NETWORKS, AND HAS IDENTIFIED THE CIRCULAR ECONOMY AS ONE OF THE FOCUS TOPICS.

Plastics machinery is a key part of the plastics industry. High standards, innovation and global competitiveness are the essential aspects of the industry, which is currently faced with considerable economic pressure. Against this background, what importance does the circular economy have, and how should, in your opinion, the industry set itself up for the future?

The plastics and rubber machinery industry in Germany is facing a challenging global environment. After years of stable growth, the industry has been characterized by declining incoming orders, falling capacity utilization and ongoing cost pressure since 2022. Order intake remained at a low level in the first quarter of 2026 and China is the strongest competitor and largest producer worldwide. Although Germany is maintaining its position as a leading export country, it is facing weak demand, high energy costs, and global price pressure.

Against the backdrop of supply bottlenecks due to the closure of the Strait of Hormuz, the circular economy is gaining in importance. The production of plastics worldwide is declining, while prices are rising at the same time, and thus recycling is gaining in importance, in addition to sustainability, it is also about security of supply. Already at the K Fair, the circular economy was one of the three central leitmotifs „Green – Smart – Responsible“. It is no longer a marginal issue, but the core of industrial modernization: manufacturers are developing machines that can safely process recyclates, raw material producers are offering new circular material classes, and the entire value chain is increasingly aligning itself with the principles of „Reduce, Reuse, Recycle“. The circular economy is thus both a sustainability strategy and an innovation engine that enables efficiency gains and CO_2 reductions.

The results of the Global Plastics Flow 2023 study provide important impetus for the future direction of plastics mechanical engineering. Globally, the amount of waste treated in an environmentally sound manner is increasing (71%) and the amount collected for recycling is growing continuously.
The success factor is the expansion of extended producer responsibility (EPR systems), which has been identified worldwide as an effective lever for reducing incorrect disposal. At the same time, the study shows that Asia - especially China - is catching up strongly in recycling and energy recovery, creating new market opportunities but also stronger competition.

This makes it clear that the future of plastics mechanical engineering lies in circular business models, innovation-driven recycling technologies, stronger international cooperation, and a strategic focus on resource efficiency. Those who consistently anchor the circular economy as a technological and business model will remain globally competitive in the future.

STUDIES AND PROJECTS

OVERVIEW The BKV is the competence centre of the German plastics industry for sustainability of plastic products with a view to resource efficiency and circular economy. Its task is to provide data for a fact-oriented discussion. The demand for data and facts results from the present or foreseeable issues from industry, science, politics and society. This forms the basis for the conception and selection of the projects tackled by BKV. A preselection of the topics to be dealt with is made by BKV's Technical Committee, which is composed of experts from the shareholders of BKV.

The topics covered by BKV in its project work can be subdivided into the following six areas:

MARKET DATA:
Sound data and facts are a key aspect for the BKV. The "plastics flow" is the prime example of a validated database for plastics through its entire life cycle.

PLASTICS IN THE ENVIRONMENT:
Comprehensive studies on plastics in the environment, through both terrestrial and aquatic discharges into the environment, the methodology of the entry pathways and numerous special editions are dealt with here.

CIRCULAR ECONOMY:
The topics of circular economy and resource efficiency cover the contribution of plastics to climate protection as well as issues involving the sustainable availability of raw materials on the market. Here, the circulation of carbon is a key aspect.

LEGAL FRAMEWORK:
Observing and evaluating existing and future legislation forms the basis for plastic markets with constantly more complex requirements on the material and its application.

RECYCLING TECHNOLOGIES:
This section is concerned with the investigation of technology-neutral recycling and recovery paths for plastics-containing material streams. It covers optimisation of mechanical recycling in the context of the collection and treatment as well as techno-economic analysis of complementary chemical recycling processes, in order to use less waste for energy recovery in the future.

STANDARDISATION:
The BKV is engaged in the Plastics Committee of the German Standardisation Body DIN, both as co-chair in the Board of the Plastics Committee as well as participating the working committees of plastics recycling and environmental aspects.

STUDIES ON CIRCULAR ECONOMY:

STUDY	COSTS
End-of-Life Vehicles Regulation (ELVR) – Fulfilment of recycled content target in EU 27+3	2026. 130 pages. Price 800 EUR (plus VAT) Short version: free of charge
The reuse targets in the PPWR (Packaging and Packaging Waste Regulation) and possible exemptions from the reuse obligations	2026. 98 pages. Price 400 EUR (plus VAT) Short version: free of charge
Chemical recycling in Germany – Status quo 2024 and forecast until 2030/35	2025. 73 pages. Price 500 EUR (plus VAT) Short version: free of charge
Global Plastics Flow 2023	2025. 196 Pages. Price 800 EUR (plus VAT) Short version: free of charge
Status quo and forecast of demand for and availability of post-consumer recyclates in 2030	2025. 76 pages. Price 1.250 EUR (plus VAT) 2025. 39 pages. Price 600 EUR (plus VAT, shortened version) Short version: free of charge
Potential of plastic recycling from commercial end user waste	2025. 104 pages. Price EUR 800 (plus VAT) Short version: free of charge
Plastic relevant waste streams in Germany 2023	2025. 65 pages. Price EUR 600 Euro (plus VAT) Short version: free of charge

For more information on the studies go to: www.bkv-gmbh.de/studies.html

STUDY	COSTS
Plastic flow in Germany 2023	2024. 108 pages. Price EUR 800 (plus VAT) Short version: free of charge
Comparison of different standards for assessing the recyclability of plastic packaging	2023. 57 pages. Price EUR 400 (plus VAT) Short version: free of charge
Economic assessment of instruments for promoting the recycling of plastics	2022. 76 pages. Price EUR 600 (plus VAT) Short version: free of charge
Potential for the use of recycled plastics in packaging	2020. 103 pages. Price EUR 500 (plus VAT) Short version: free of charge
Plastic Parts from ELVs	2020. 117 pages. Price EUR 450 (plus VAT) Short version: free of charge
Thermal Processes for Feedstock Recycling of Plastics Waste	2019. 170 pages. Price EUR 500 (plus VAT) Short version: free of charge
Basis for assessment of pyrolysis of mixed plastics waste	2021. 33 pages. Price EUR 500 (plus VAT) Short version: free of charge

For more information on the studies go to: www.bkv-gmbh.de/studies.html

STUDY	COSTS
Titanium Dioxide in Plastics in Germany	2019. 61 pages. Price EUR 400 (plus VAT) Short version: free of charge
Generation and management of EPS and XPS Waste in 2016 in Germany in the packaging and building industries	2017. 42 pages. Price EUR 300 (plus VAT)
Potential for increasing mechanical recycling of plastic packaging – recycling-friendly design, sorting technology	2016. Result report (38 pages) and Management Summary (24 pages). Price EUR 350 (plus VAT) Infoflyer: free of charge
Development of the efficiency of plastic packaging – 1991 to 2013	2015. 102 pages. Price EUR 350 (plus VAT) Infoflyer: free of charge
Demand and Utilization of Carrier Bags and Vest Carrier Bags for Service Counter Goods in Germany	2014. 78 pages. Price EUR 350 (plus VAT) Short version: free of charge
Scenarios for the collection, treatment and recovery of plastics-containing waste streams – dry bin concept	2011. 40 pages. Price EUR 330 (plus VAT)

For more information on the studies go to: www.bkv-gmbh.de/studies.html

STUDIES ON PLASTICS IN THE ENVIRONMENT:

STUDY	COSTS
Marine Litter: From Land to Sea - Model for the documentation of land sourced plastic litter	2023, 5th revised version. 109 pages. Can be ordered free of charge
Plastics in the Environment: Special Report „Pellet Losses“	2022. 75 pages. Can be ordered free of charge
Report: Plastics in the Environment in Germany	2021. 96 pages. Can be ordered free of charge
Marine Litter: Discussion paper „Tyre abrasion“	2020, 2nd version. 18 pages. Can be ordered free of charge
Marine Litter: Special Report „Littering“	2020, 2nd version. 27 pages. Can be ordered free of charge
MicBin joint project, work package 4.1 Report: Study of Hydropower Plants	2020. 18 pages. Can be downloaded free of charge
MicBin joint project, work package 3.3 Report: Analysis of Direct Discharges	2021. 29 pages. Can be downloaded free of charge
MicBin joint project, work package 3.5 Report: Littering and Line Loading of Waterways	2021. 26 pages. Can be downloaded free of charge
MicBin joint project, work packages 5.5 & 5.6 Report: Model expansion and modelling	2021. 26 pages. Can be downloaded free of charge

For more information on the studies go to: www.bkv-gmbh.de/studies.html

NETWORK

DIALOGUE

The BKV is in regular contact with expert groups, especially on topics concerned with the circular economy and environment. These experts work in the plastics and recycling sector and also in customer industries, hold responsible positions in political execution at the Federal and the Bundesländer level or are employed in scientific institutes, associations and NGOs.
The key tools for BKV communication are, in addition to a lively website, regular newsletters, specialist events, expert publications and the LinkedIn channel, see de.linkedin.com/company/bkv-gmbh.

NEWSLETTER

The BKV newsletter, which is published on a weekly basis, summarises media reports and news, and thus provides topical information on current news connected with the circular economy, plastics recovery and recycling. Further information and registration at www.bkv-gmbh.de/bkv-nl-register.html.

SPECIALIST EVENTS

As part of its work to provide facts and information, BKV regularly organises specialist events.
One of these in particular is the BKV Symposium, which, in the last business year, took place in the representation of the Bundesland Saarland in Berlin. The high-quality and successful event was opened by Petra Berg, Minister for the Environment, Climate, Mobility, Agriculture and Consumer Protection, Saarland, and Bernhard-J. Borgardt, Managing Director of Ostedruck Bernhard-J. Borgardt GmbH & Co. KG and deputy chair of the Advisory Board of BKV GmbH. The latest study results were presented by experts from well-established institutes and shareholders of BKV, and discussed together with representatives of the industry, administration, science and NGO.
The BKV contributes to specialist events and conferences, for example by presenting at the Forum for the Future of the Plastics Circle of the German Federal Ministry of Research, the Circular Packaging Innovation Forum, the Circular Plastics Summit Alps-Adria, the joint PVC Symposium of Plastics Europe and VinylPlus, the Recycling Seminar of Saxony etc., and also through podium participation at the special show at K, the world's leading plastics trade fair and the Environmental Conference of the Bundesland Baden-Württemberg.
Through such events, BKV reaches not only a much broader audience for its communication to the trade and special community, but above all also attracts the direct interest of its competence networks both in and outside the plastics sector.

ORGANISATION

ADVISORY BOARD OF THE BKV

The advisory board is the statutory controlling body of the company and supervises the management.

TECHNICAL COMMITTEE (TA)

The TA consists of experts from the shareholder companies and organisations. It assesses project proposals, including the required budget, and monitors the results. It reports to the Advisory Board. The spokesman of the Technical Committee is Dr. Frank Buckel (Covestro Deutschland AG).

EXCHANGE WITH STAKEHOLDERS

Another BKV committee is made up of representatives of key stakeholders, especially from industry, science and administration. The committee advises the company in fundamental issues of the business purpose, and thus gives the plastics industry the opportunity to discuss relevant issues based on facts and oriented to practice.

MEMBERS OF THE ADVISORY BOARD

Chairman:
Matthias Stechhan
(LyondellBasell)

Vice chairman:

Bernhard Borgardt
(Ostedruck)

Marc van den Biggelaar
(DOW)

Inga Böhlke
(Bischof + Klein)

Dr. Martin Engelmann
(IK Industrievereinigung Kunststoffverpackungen)

Michael Freutsmiedl
(Borealis)

Dr. Helen Fürst
(Fürst Group)

Dr. Andreas S. Gasse
(allvac Folien)

Dr. Christian Haessler
(Covestro)

Dr. Jens Hamprecht
(BASF)

Permanent guests:

Dr. Christine Bunte
(Plastics Europe Deutschland)

Thorsten Kühmann
(Fachverband Kunststoff und Gummimaschinen im VDMA)

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SHAREHOLDERS

- A. Schulman GmbH
- Akzo Nobel GmbH
- Amoco Chemical (Europe) S.A.
- Baerlocher GmbH
- Basell Polyolefine GmbH
- BASF Lampertheim GmbH
- BASF Polyurethanes GmbH
- BASF SE
- Bischof + Klein SE & Co. KG
- Borealis Polymere GmbH
- Borealis Polyolefine GmbH
- Covestro Deutschland AG
- Dow Olefinverbund GmbH
- Dürrmann GmbH & Co. KG
- Eastman Chemical B.V.
- ETIMEX Primary Packaging GmbH
- Evonik Operations GmbH
- Gesamtverband kunststoffverarbeitende Industrie e.V. (GKV)
- Greif Packaging Germany GmbH
- Heuchemer Verpackung GmbH & Co. KG
- IK Industrievereinigung Kunststoffverpackungen e.V.
- Industrieverband Kunststoffbahnen Europe e.V. (IVK)
- Ineos Manufacturing Deutschland GmbH
- INOVYN Deutschland GmbH
- INOVYN Schkopau GmbH
- Liveo Research GmbH
- Mauser-Werke GmbH
- MKF-Schimanski-ERGIS GmbH
- Müller AG Plastics
- Nordfolien GmbH
- Petainer Lidköping AB
- PlasticsEurope Deutschland e.V.
- Repsol Chemie Deutschland GmbH
- RPC Neutraubling GmbH
- RPC Packaging Belgium N.V.
- RPC Packaging Holdings (Deutschland) B.V. & Co. KG
- RPC Wiko GmbH
- SABIC Deutschland GmbH
- Schütz GmbH & Co. KGaA
- Seufert Verpackungen GmbH
- SL Packaging GmbH
- STRUBL GmbH & Co. KG Kunststoffverpackungen
- TotalEnergies Petrochemicals & Refining SA/NV
- Verband Deutscher Maschinen- und Anlagenbau e.V. (VDMA)
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