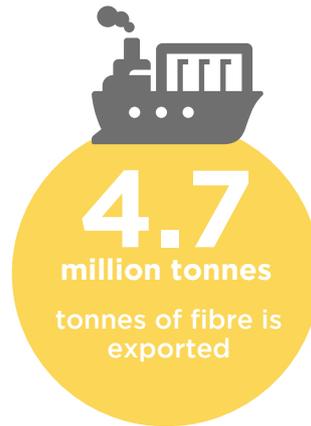
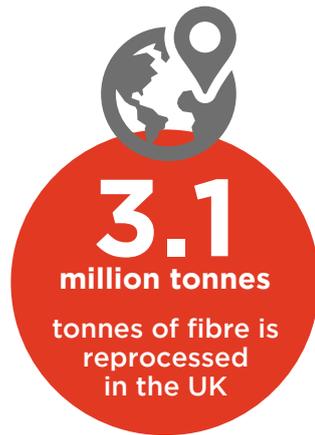
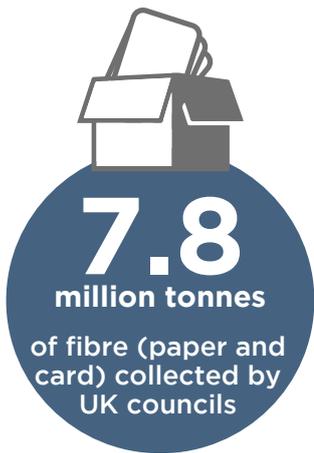


**OURPAPER**

# **Raise the standard of our paper and cardboard recycling**

Market briefing for local authorities





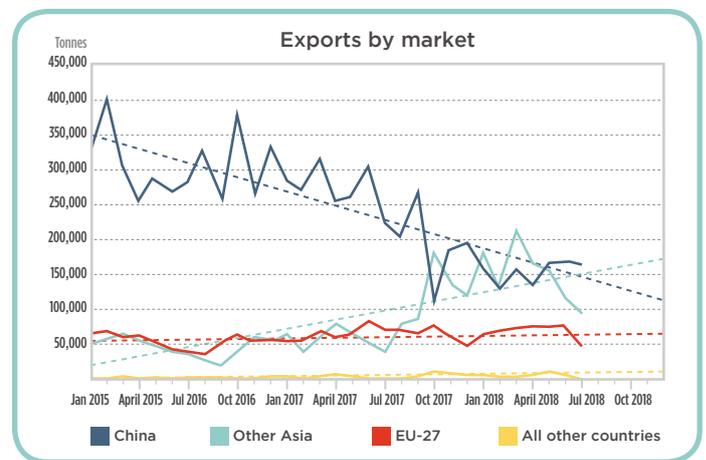
The UK fibre market is under considerable pressure. Quality is the key to ensuring long term sustainable outlets, product value and financial benefits to local authorities.

## The Chinese Government has banned all ‘post-consumer’ plastics and mixed paper

Historically, China has provided significant export capacity for the UK recovered paper market, with 61% of exported material sent to China in 2017. Now, due to the poor quality of material, the Chinese Government has banned all “post-consumer” plastics and mixed paper. It has also implemented a 0.5% contamination limit for all fibre, with a complete ban on importing recovered paper coming into force by the end of 2020.

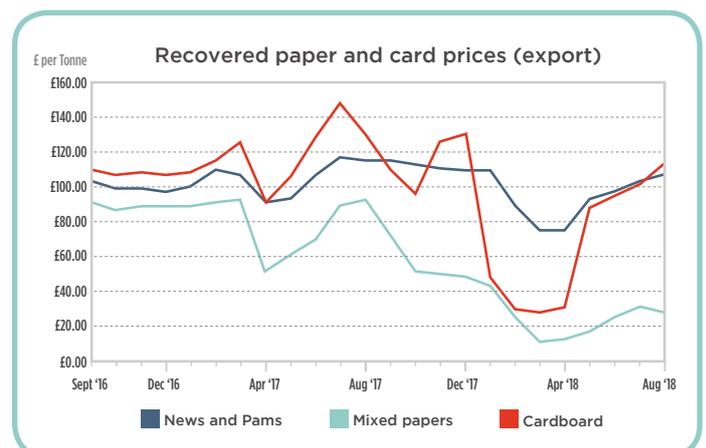
Other markets in Southeast Asia, India and Turkey have taken some of the materials formerly exported to China. However, this is rapidly changing as they also seek to restrict poor quality materials entering their countries, with restrictions on imports now being seen in Vietnam, Malaysia and Indonesia.

No country wants to become the next dumping ground for low-quality mixed recycling.



## UK mill requirements and prices

Paper mills around the world remain hungry for high-quality, separately collected paper and card. The UK reliance on the Chinese market and its sudden reduction of exports has had a significant impact, with large scale price reductions due to excess material availability on the market, fewer outlets for poor quality material, and the emergence of short term, undeveloped markets while prices are low. This can be seen in the reduction in the value of mixed paper which predominantly comes from a co-mingled source.



## Key challenges and risks for councils

- The UK needs to improve quality to maintain value in fibre and attract new markets and investment in the UK infrastructure.
- Export quality requirements are now very tight. If paper and card is to continue to be exported, it needs to meet these tighter standards, or face high costs of return, or even breach export legislation for waste.
- Increased gate fees at Materials Recovery Facilities sorting mixed (co-mingled) recycling, to try and achieve export requirements, passing costs back to local authorities.
- Clear revenue gap between separately collected fibres and fibres collected in a co-mingled stream
- Reduced material revenue for councils where MRF mixed paper recycling proves unfit for export or UK consumption and is disposed of, adding disposal and Landfill Tax charges.
- Continued communication with householders to reduce contamination in paper recycling increases costs.
- Potential for introduction of Deposit Return Systems (DRS) to remove value from recycling collections (especially metals and plastics).
- Higher levels of risk perceived by waste collection contractors may reduce competition for tenders and lead also to renegotiation of current contracts as they seek to recover costs.

## How can we address those challenges?

Paper and card recycling are the backbone of most kerbside recycling schemes. Improving the quality and quantity of paper and card recycled is good for the environment, good for your council taxpayers and good for British manufacturing that uses high-quality recovered paper to produce high-quality recycled papers and cardboard – building the circular economy.

Research by WRAP, supported by a multi-sector advisory group, identified consistency of recycling collections as an important future development – to reduce public confusion about what can be recycled and to increase the efficiency of recycling schemes.

Their analysis indicated that moving to multi-material kerbside sorting could deliver net financial benefits to local authorities of up to £400 million over eight years, adding up to seven percentage points to the national recycling rate and returning up to £478 million of materials into the economy as dry recyclables.

**If the challenges identified here encourage to look again at your recycling service, we can help you re-evaluate the potential for separately collected paper and card to maintain the backbone of a viable, high-quality recycling collection.**



## How can we help?

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- Brief you and your members on the rapid changes in the markets for recycling and current policy developments, including site visits to paper mills if required
- Assess in outline the impact of your current recycling services, and suggest short-term improvements to boost quality and ensure material is properly recycled
- Assist in analysing the potential for service review in line with the demand for greater consistency. Support you in ensuring your recycling service meets public expectations and supports UK manufacturing with high-quality feedstock

**OUR PAPER** can help you through the recycling maze.

## About Our Paper

This initiative is funded by the Confederation of Paper Industries and its members to support councils in improving the quality and quantity of paper and card separately collected for recycling. The CPI (Confederation of Paper Industries) represents the UK fibre market recycling 3.1 million tonnes of fibre each year.

We have created this programme, in partnership with WRAP, to promote the findings of WRAP's valuable work on recycling consistency and encourage councils to consider service review, to promote separate collection of paper and card, maximising efficiency and the cost savings potential from other changes to recycling services.

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