

### 6th European Gypsum Recyclers Forum

Brussels – 16 November 2023

#### Summary note

DATE: 16 NOVEMBER 2023

Eurogypsum, the European federation of national associations of gypsum product manufacturers, held its **6<sup>th</sup> European Gypsum Recyclers Forum in Brussels** on 16 November 2023.

The Forum gathered representatives from the EU institutions, national organisations and several companies along the gypsum recycling chain (*see final list of participants in annex*).

**Jörg Ertle**, Eurogypsum's President, welcomed participants and highlighted the key milestones around gypsum recycling. A major success was the GtoG project, co-funded by the European Union, which provided evidence that plasterboard can be produced with up to 30% of recycled content. The project was followed by the subsequent definition of the quality criteria for recycled gypsum,



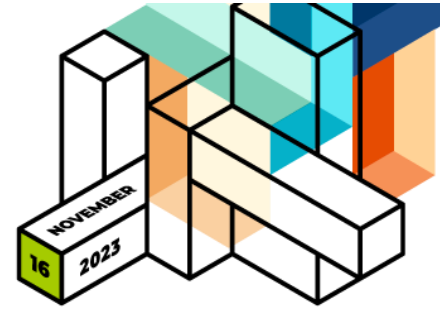
#### The latest figures on gypsum recycling in Europe

**Xavier Meyer**, Circular Economy Leader at Saint-Gobain and the Leader of Eurogypsum's Circular Gypsum Working Group, shared the results of Eurogypsum's 2022 annual survey



regarding the quantities of recycled gypsum. We are observing a steady decrease in the quantities of FGD gypsum. While recycled gypsum from Construction and Demolition Waste (CDW) remains a relatively low share of the total quantity of gypsum used annually, there has been an improvement in the quantity of recycled content both in terms of volumes and the share of the total. The situation differs among EU countries with the leaders reaching around 10% of CDW recycled.

There are ongoing initiatives in certain member states aimed at supporting higher recycling in the construction industry, e.g., the landfill ban in Austria or the setting of minimal recycled content targets in public buildings in Italy.



### Views from practitioners: Ambitions and challenges in gypsum recycling

Practitioners from various companies along the gypsum value chain exchanged their perspectives during a panel discussion. **Fernando Pardo**, the Country Circular Economy Manager at Saint-Gobain Placo Ibérica and Saint-Gobain Isover Ibérica, pointed out the lack of a strong push towards more gypsum recycling in countries with high quantities of natural gypsum available. Due to the higher cost of recycled gypsum in

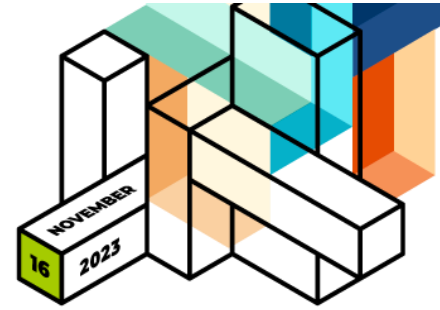


comparison to natural gypsum extraction, and the low price of landfilling CDW, there are few economic incentives to recycle more. **Harald Schmitt**, the Head of Synthetic Gypsum Department for the Knauf Group, highlighted that ensuring the availability of sufficient quantity of high-quality recycled gypsum, free from any contamination, should be the priority objective. **Iryna Yermakova**, the Head of Environment, Health and Safety &

Sustainability at Etex France Building Performance, stressed a key difference between sourcing recycled gypsum as opposed to natural gypsum: the sourcing of recycled gypsum is significantly more complicated as it does not come from a single source, and there are numerous actors involved. **Nicolas Clavelloux**, responsible for R&D and the development of recycling branches at SERFIM Recyclage / Nantet, commented that the support from industrial actors in the plaster industry is crucial to ensure there is an outlet for the recycled gypsum. **Ilaria Frealdo**, in charge of logistics and purchases at Frealdo Asfalti Srl, mentioned that a key challenge for recyclers is to obtain a product meeting all the criteria which make it suitable to be reintroduced into the gypsum industry. **Maarten Hendriks**, the Managing Director at New West Gypsum Recycling, stressed that to succeed in



achieving closed-loop gypsum recycling, the recyclers and manufacturers should not be seen as two separately operating entities, but rather as partners, working closely together for a common purpose. **David Jörgens**, responsible for the Mineral Materials division at REMONDIS Southwest, emphasised the main challenge in recycling: waste always seeks the cheapest route. He also stressed the importance of paper management in



plasterboard recycling, which is why at Remondis, a dedicated paper division works together with a paper manufacturer to recycle the paper recovered during plasterboard recycling.

During the discussion, the panellists pointed out several key factors needed to ensure further progress on gypsum recycling:

- Appropriate supervision of waste segregation.
- Legislative tools supporting availability of CDW for recycling, e.g., through landfill bans, landfill tax.
- A strategic, close-knit relationship between the manufacturers and the recyclers to minimise the outflow of recycled gypsum into other industry's value chains.
- Ensuring profitability of the secondary raw materials market

The panellists listed the following main drivers to increase the demand for recycled gypsum: the price factor; the need for increased volumes, exacerbated by the decline of FGD quantities; and the sustainability objectives integrated into many manufacturers' visions.



### *The latest on gypsum recycling in Europe: EU regulatory framework*

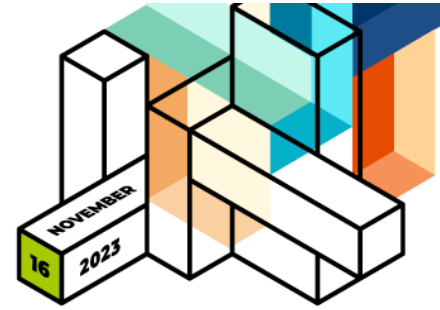
**Florian Flachenecker** presented the European policy context around construction and demolition waste. A Policy Officer in the Directorate-General for Environment at the European Commission, working on the circular economy and in particular on the Waste



Framework Directive, Mr Flachenecker explained that construction and buildings are a key value chain from the point of view of circularity. There are already several EU initiatives aimed at increasing the recycling of CDW in the EU Circular Economy Action Plan as well as in the Waste Framework Directive. He also highlighted a few upcoming initiatives, such as the analysis of possible EU-wide end-of-waste criteria for CDW. The forthcoming Joint Research Centre

study has already delivered a few insights on gypsum waste. While the findings confirm the potential of incorporating up to 30% of recycled content into plasterboard, they also reveal persisting barriers to realising the full potential of gypsum recycling such as the low market value of the secondary material. Mr. Flachenecker also gave insights into the logic, objectives, and methodology of the EU Taxonomy for sustainable finance. He highlighted that the Taxonomy criteria are not mandatory for all producers. Instead, they are a voluntary tool which outlines criteria for entities which wish to be Taxonomy-aligned and thus labelled as 'environmentally sustainable'. By setting the targets for maximum primary raw material content, the EU Commission aims to direct private investment away from the





primary raw materials and towards the use of secondary raw materials. Florian Flachenecker stressed that engagement of the EU regulators with industry actors is crucial to achieve the common objectives and encouraged the participants to engage in dialogue. He underlined that the logic of the EU Taxonomy is to define thresholds achievable by only the best performers, to incentivise the sector frontrunners. Nevertheless, he encouraged the stakeholders to provide feedback on whether the targets are achievable or not, even on a small-scale level.

### *The latest on gypsum recycling in Europe: Extended Producer Responsibility: the French example*

**Rami Jabbour**, the Marketing & Communications Director at Valobat, presented the assumptions of the French Extended Producer Responsibility (EPR) scheme. Valobat was created in 2021, simultaneously with the arrival of the EPR scheme in France, which recently began to apply to the construction products. The scheme puts the producers in charge of the management of waste generated by their products in the job site. The producers can also transfer this responsibility to an eco-organisation such as Valobat. The producers pay an eco-contribution to Valobat, who manages the whole waste management chain. The company's main priority at the moment is setting up different ways of collecting waste. Mr. Jabbour highlighted that if the waste is separated at the job site it is taken free of charge. Consequently, the waste is recycled into production.



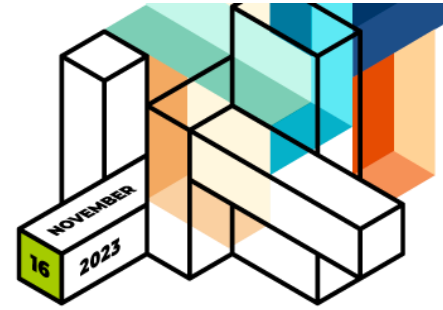
### *Eurogypsum's Quality Criteria for Recycled Gypsum. Towards End of Waste Status?*

**Xavier Meyer** explained the policy background behind the end-of-waste (EoW) status. The main objective for granting the EoW status to secondary raw materials is to change the perception of the material from a waste to a valuable resource. It therefore aims to accelerate the transition towards circular practices and to reduce administrative burden. Mr Meyer presented the Eurogypsum quality criteria for recycled gypsum, which should help re-processors to ensure that they are procuring a material of consistent quality and can be granted the EoW status.

### *Outlook: Gypsum recycling in North America*

**Stephen Meima**, the Executive Director of the Gypsum Association, Eurogypsum's counterpart association in North America, shared the perspectives on gypsum recycling from across the Atlantic. The topic of gypsum recycling in North America is still fairly new. The majority of the





recycled gypsum is directed to agricultural use. Nevertheless, the topics of sustainability and resource efficiency are gaining momentum and change is happening from within the industry. The government agencies are also incentivising a more sustainable resource use for example through the Smart Materials Management Initiative.

### ***Debate: How can Europe and North America advance together?***

The participants exchanged their views on the similarities and differences regarding gypsum recycling in Europe and North America. **Jean-Luc Marchand** mentioned that the



waste being shipped from one country to another is a big challenge in Europe, but it also takes place in North America, where waste is often shipped from Canada to the US. **Maarten Hendriks** highlighted that the only region in North America where closed-loop gypsum recycling is truly successful is British Columbia in Canada, thanks to the landfill ban in force there. However, the

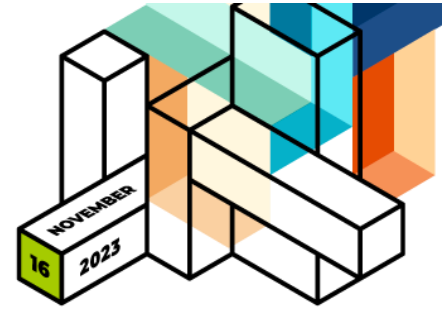
pace is picking up in the US, with more industry and government actors becoming interested in gypsum recycling. **Tim Mulso**, from USA Gypsum, explained that the company

has been recycling gypsum for agricultural use for over 20 years and that more closed-loop recycling opportunities have been arising in the past years. One of the main hurdles he mentioned was the relatively low profitability of the recycling business due to low gate fees for recyclers and very low tipping fees at landfills. **Stephen Meima**



highlighted that ultimately the topic of recycling plasterboard is subject to the competition among companies, trying to position themselves as the most sustainable alternative, using more circular practices. **Tim Mulso**

discussed the opportunities for cooperation between players from both sides of the Atlantic for gypsum recycling. He mentioned the Construction, Demolition, Recycling Association (CDRA) which formed the Gypsum committee pooling together stakeholders to address the recycling topic. Moreover, USA Gypsum has partnered with the University of Florida to develop Best Management Practices to set industry standards within the recycling area. Maarten Hendriks pointed out that there is willingness for interactions from government bodies in North America with European entities to exchange knowledge.



**Jörg Ertle**, Eurogypsum's President, closed the Forum thanking the speakers, attendees, and organisers. He brought attention to the need for partnerships and cooperation between all stakeholders in order to progress on the common objective of supporting gypsum recycling.



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