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PRESS RELEASE

Recycling Becomes Feedstock for Europe – Encouraging Greater Autonomy

New position paper by BZL and nova-Institute outlines ten policy building blocks for a defossilised and resilient European chemical industry

Hürth, 20 January 2026: The paper 'Recycling Becomes Feedstock for Europe – Let's Dare More Autonomy' with 65 pages by BZL and nova-Institut presents ten policy proposals on how waste management and the chemical industry must change to enable a transformation towards circular economy, supply with renewable carbon and defossilisation.

Many things are currently in flux geopolitically. Europe must find answers to this. The chemical industry has fallen into a severe economic crisis. Would lower industrial electricity prices help? 'Yes, but that's not enough,' is the response from the industry, 'more needs to be done.' If you dig deeper, you realise that fundamental change is necessary: The current crisis in the chemical industry is ultimately a crisis of the fossil-based business model. In the past, for coal, as well as for oil and natural gas, the EU and its member states repeatedly succeeded in keeping the supply of feedstock cheap. In recent years, this has become increasingly difficult, as oil came from countries that had built up their own chemical industries. Ultimately, Russia was the guarantor of success.

The enormous conflicts that have arisen are currently becoming apparent as global players secure access to the last major mineral oil reserves. Does the EU want to play along? The German Federal President recently referred to this as a 'den of thieves'.

There is an alternative path that avoids this 'den of thieves' but also avoids the loss of the chemical industry in the EU. Waste management must develop into a new feedstock source for supplying the chemical industry. This idea is not new, but so far it has remained theoretical. There has been a great deal of scientific research and scenario planning on how such a feedstock source could be tapped. What is still lacking is an analysis of the legal implications of such an approach. Without the appropriate legal framework, this idea will remain theoretical, and securing locations, innovation and economic prosperity will remain wishful thinking. The minor concessions discussed nowadays do not solve the underlying problem and only slow down the exodus.

In addition to electrification and efficiency improvements, carbon supply is of central importance to the chemical industry. In a new paper, BZL and nova-Institut propose ten measures what would need to change in waste management and the chemical industry in order to implement defossilisation as relevant transformation. Currently, the legal areas of waste management and the chemical industry are operated separately from each other, in effect as independent silos that are hardly permeable to each other. This was not only the case in the past, but is also evident when looking at the planned legislation.

The paper shows how this goal of transformation or defossilisation can be implemented step by step and how legal areas can be better integrated at EU level, which will result in new priorities for both sectors. For example, in waste management, much of what does not contribute to the carbon supply of the chemical industry can be phased out gradually. It also includes enabling all recycling technologies, from mechanical and physical to chemical processes and even incineration with CO₂ capture and utilisation, since all processes are needed in the transformation for the different waste fractions and target products. Overall, the ten proposals derived and analysed in the paper also lead to a significant reduction in bureaucracy.

There are some important proposals that build on instruments already introduced by the EU, such as substitution quotas for selected plastics sectors. The authors also specify proposals that are under discussion or have been put forward by Member States. However, there are also proposals to phase out existing regulations. It is important that the proposals build on each other and are implemented in a coordinated manner as part of a self-contained, phased overall package.

Fortunately, greater autonomy is becoming mainstream in the EU and is also one of the cornerstones of the new EU Council Presidency. However, unless it becomes practical, greater autonomy and resilience will remain nothing more than a narrative. And the path to achieving this will be fraught with difficulties.

Please find the full position paper here:

<https://renewable-carbon.eu/publications/product/recycling-becomes-feedstock-for-europe-lets-dare-more-autonomy-pdf/>

About BZL

For more than 30 years, BZL Kommunikation und Projektsteuerung GmbH has provided scientific advice and support to policymakers, public authorities, associations, companies and civil society organisations, particularly on circular economy, chemicals, energy and climate protection, and sustainability (CSR).

More information: www.bzl-gmbh.de | www.bzl-gmbh.de/en

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nova-Institut GmbH has been working in the field of sustainability since the mid-1990s and focuses today primarily on the topic of renewable carbon cycles (recycling, bioeconomy and CO₂ utilisation/CCU).

As an independent research institute, **nova** supports in particular customers in chemical, plastics and materials industries with the transformation from fossil to renewable carbon from biomass, direct CO₂ utilisation and recycling.

Both in the accompanying research of international innovation projects and in individual, scientifically based management consulting, a multidisciplinary team of scientists at **nova** deals with the entire range of topics from renewable raw materials, technologies and markets, economics, political

framework conditions, life cycle assessments and sustainability to communication, target groups and strategy development.

50 experts from various disciplines are working together on the defossilisation of the industry and for a climate neutral future. More information at: nova-institute.eu – renewable-carbon.eu

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