

Waste to Product Business



November 11, 2025
Vakbeursrecycling
Jan – Pedro P.M. Vis, Director Materials Renewi

Circular Materials



~200kT
Ferrous Metals



~1mT
Glass



~1mT
Water



~100kT
Plastic



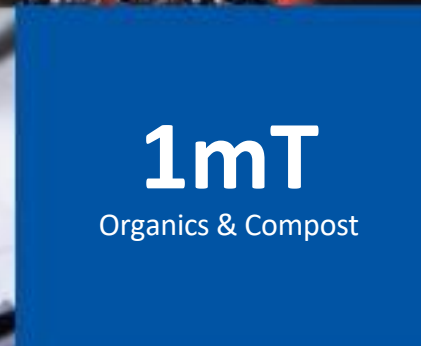
~500kT
Paper & Cardboard



~2mT
Construction Materials



~900kT
Wood



1mT
Organics & Compost



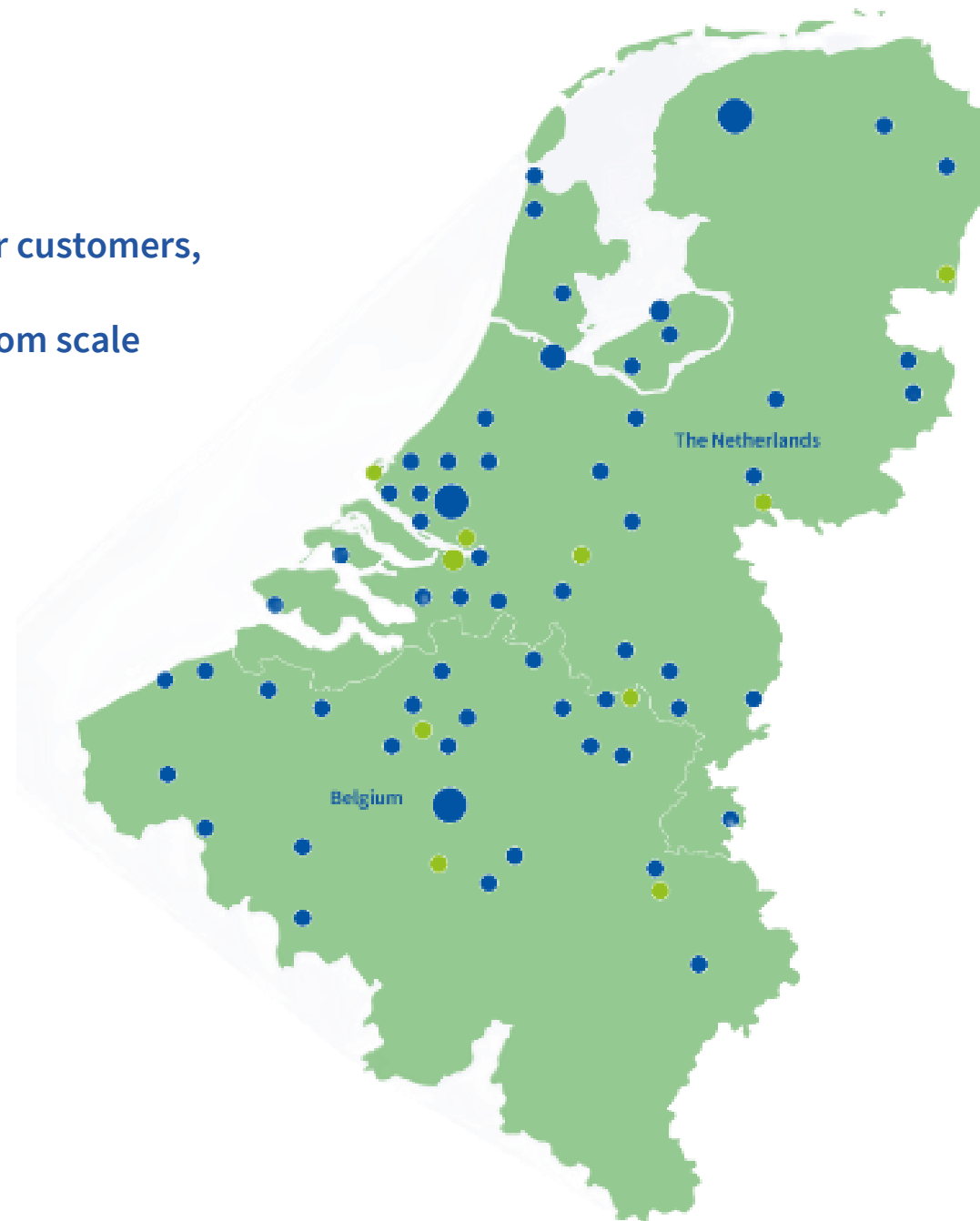
Our operating hubs

Our geographic footprint with hubs close to our customers,
and state of the art recycling sites benefiting from scale

- Commercial Waste
- Specialities: Coolrec, Maltha & Mineralz & Water

151

Number of operating sites



An external perspective

Benelux waste management market development



Netherlands and Belgium are two of the most circular economies in the world

< 1980's



Landfill

1990's



Separate collection
Organics, paper, glass, ...

2000's



Waste to Energy

> 2020's



Circular Economy

The circular economy is aligned with important Dutch social trends and business needs



Circular materials save planetary resources



Low carbon materials combat climate change



Collecting and processing waste prevents littering



Offering good quality cost competitive materials

Sustainable business success



KLM



Wallenius Wilhelmsen x Tesla



Lipton Icetea

MINERALS



Giving new life to used materials

Shortage of raw materials & CO2 emissions

Cement production is 7% of global CO₂ emissions. The industry must decarbonize



Limiting transport to short distances



Forz filler Recycle

Recycled Concrete Fines (RCF)



Bio fuels to cement kiln



2030

↓
24% SAND
EXTRACTION

2030



↓44% GRIND



2030
15 MILLION TONS
CONCRETE
RUBBLE

CIRCULAR CONCRETE

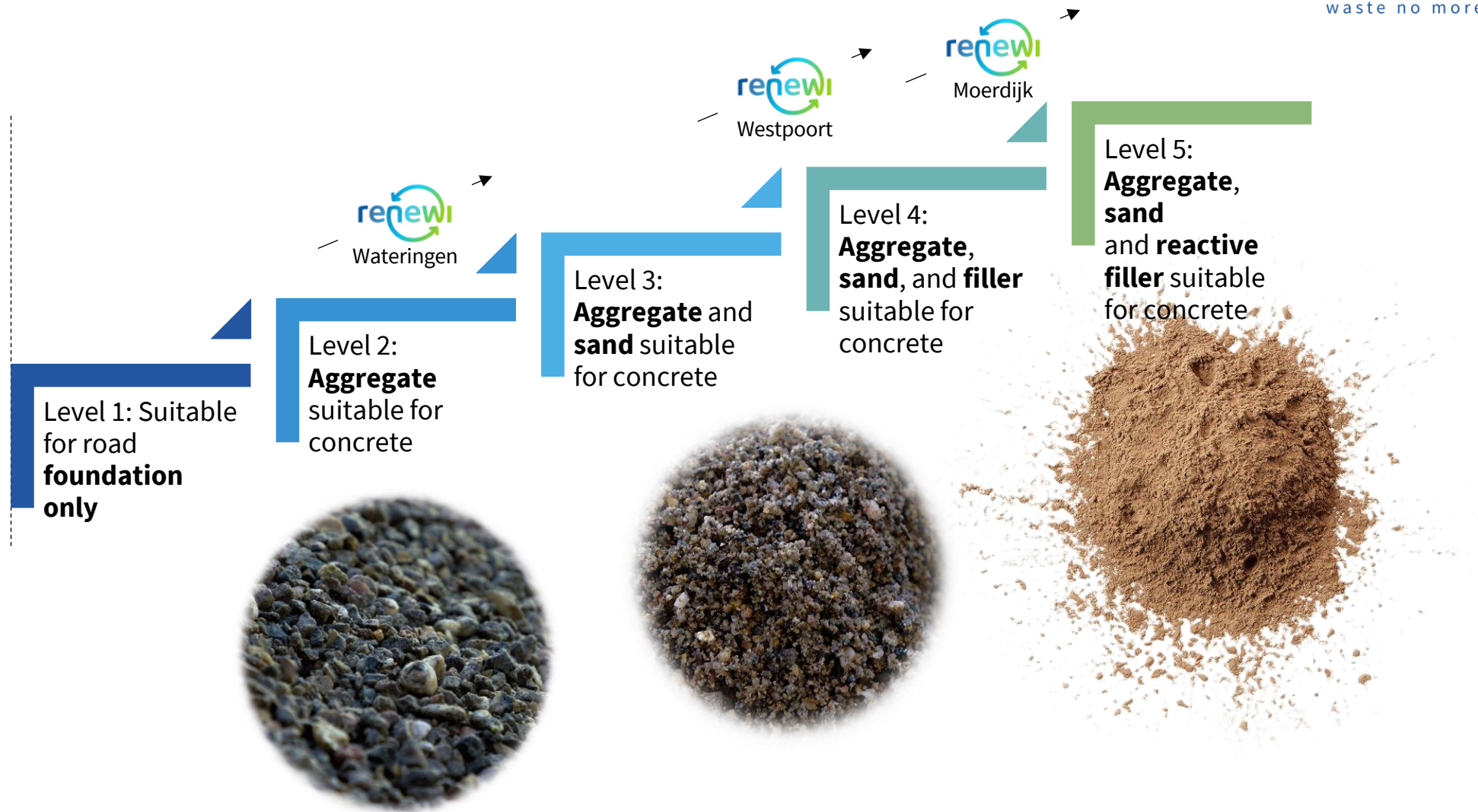


From low-grade to high-quality recycling in the concrete industry

Recycled raw materials for concrete exist at different levels.

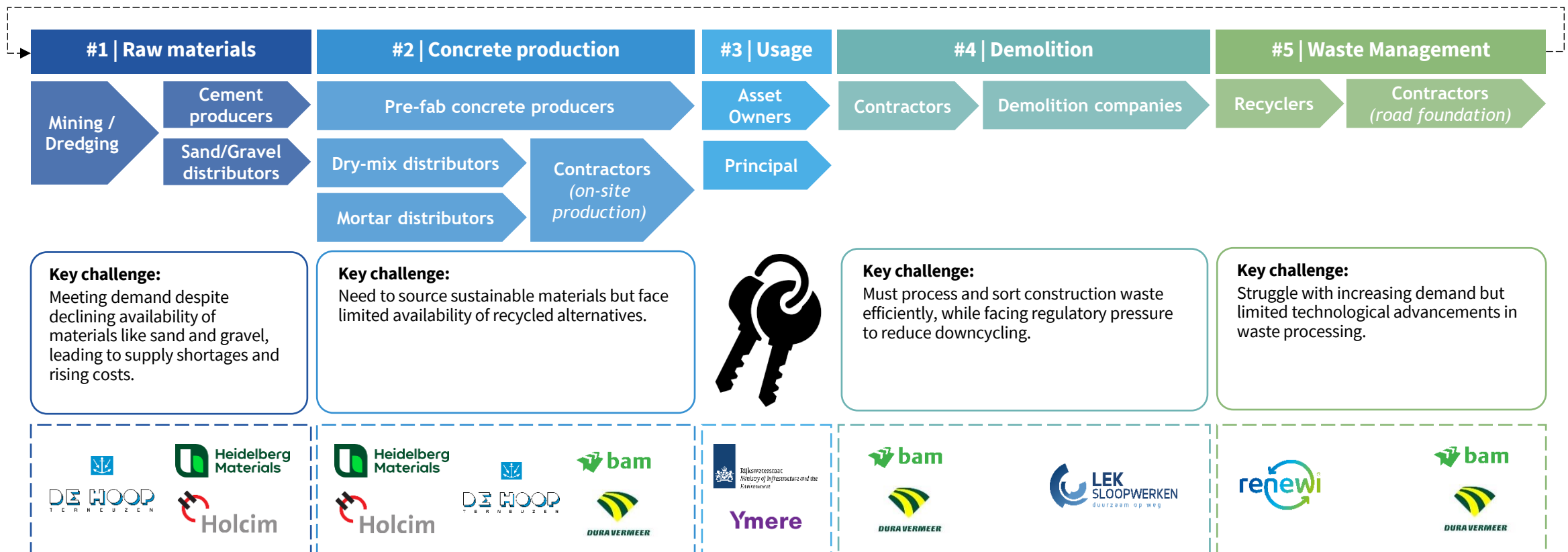


Five applications of circular materials for the road and concrete sector



The concrete industry must shift towards sustainability to survive.

Asset owners can lead the way by setting sustainable standards for concrete and demolition companies.



A sustainable milestone in RWS project A9

renewi
waste no more

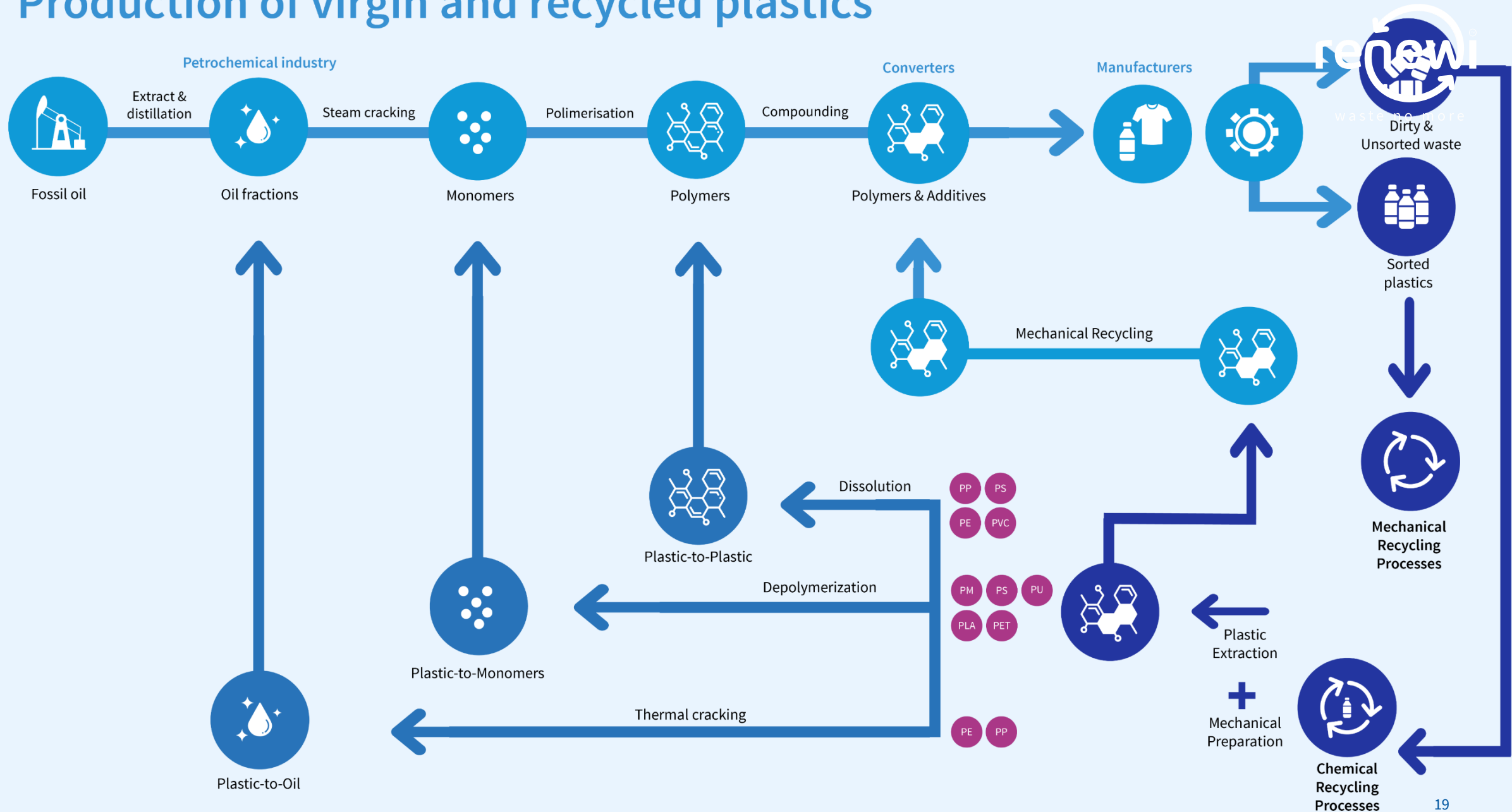


RIGID PLASTICS



Giving new life to used materials

Production of virgin and recycled plastics



Recycled Plastics Price Development



25% decrease since we commissioned our line



Bron: ICIS - 06/01, rPP black pellets

Biffa closes Sunderland plastics recycling plant

Biffa has closed its plant in Sunderland, at a time when plastic prices are low

Low Plastics prices lead to bankruptcies



4 min leestijd

18 november 2024

Terugval Europese plasticproductie bedreigt circulaire ambities

De EU wordt voor plastic steeds afhankelijker van de import uit andere landen, waar vaak minder milieuvorschriften zijn. Ook daalt voor het eerst de productie van gerecyclede plastic.

Drama voor Nederlandse plasticrecycling: Umincorp failliet en andere bedrijven in nood

Nederlandse plastic recyclingsector in zwaar weer



CIRCULAIRE ECONOMIE

Recyclingbedrijf Stiphout in Montfort bezwijkt onder goedkoop buitenlands plastic: 'Het is diep triest'

Viridor shuts down third UK plastic recycling plant



Healix in Maastricht recyclet onder meer oude visnetten.

FOTO: RUUD MORUN/ANP

CHEMIE

Plasticrecycler Healix zit ook in de problemen

Van droom naar ondergang: het faillissement van 'Nationaal Icoon' Ioniga

RTV Drenthe

Curator worstelt met afvoer van miljoenen kilo's plastic na faillissement Emmer bedrijf

Het bedrijf TRH Recycling ging anderhalve week geleden failliet. Een doorstart lijkt er niet in te zitten.

30 Jul 2024

alweer failliet

Plasticrecycling in crisis: golf aan faillissementen houdt aan

Richard Smit 5 maart 2025

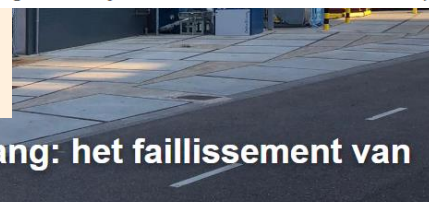
Onder Nederlandse recyclingbedrijven voor plastic vindt een kaalslag plaats. In enkele maanden tijd is het aantal faillissementen gestegen van zes naar elf, wat goed is voor

Plasticrecycling in crisis: nieuwe golf aan faillissementen



Faillissement Vinylrecycling aangevraagd

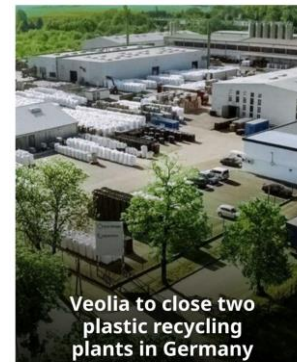
Een tweede uitstel door de Raad van State van een uitspraak in de zaak tussen Vinylrecycling en de Inspectie Leefomgeving en Transport was twee crediteuren van het bedrijf teveel van het goede. Zij hebben faillissement van de pvc-recycler aangevraagd.



Vanden to close UK plastic recycling plant

27 Aug 2025

Wave of Surging Plastic Recycling Plant Closures Hits Europe



Veolia to close two plastic recycling plants in Germany



Increased imports of recycled plastic under economic pressures and excessive demand have led to a decrease in production

De plastic recycling-industrie dreigt te worden weggevaagd



Plastics Sorting

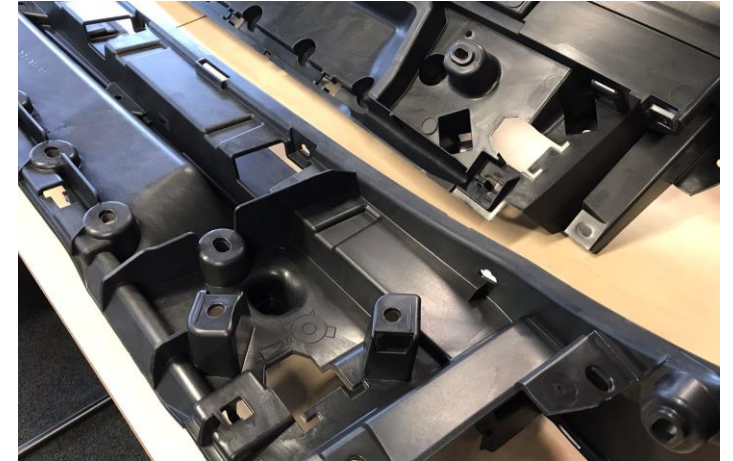


Plastics Sorting

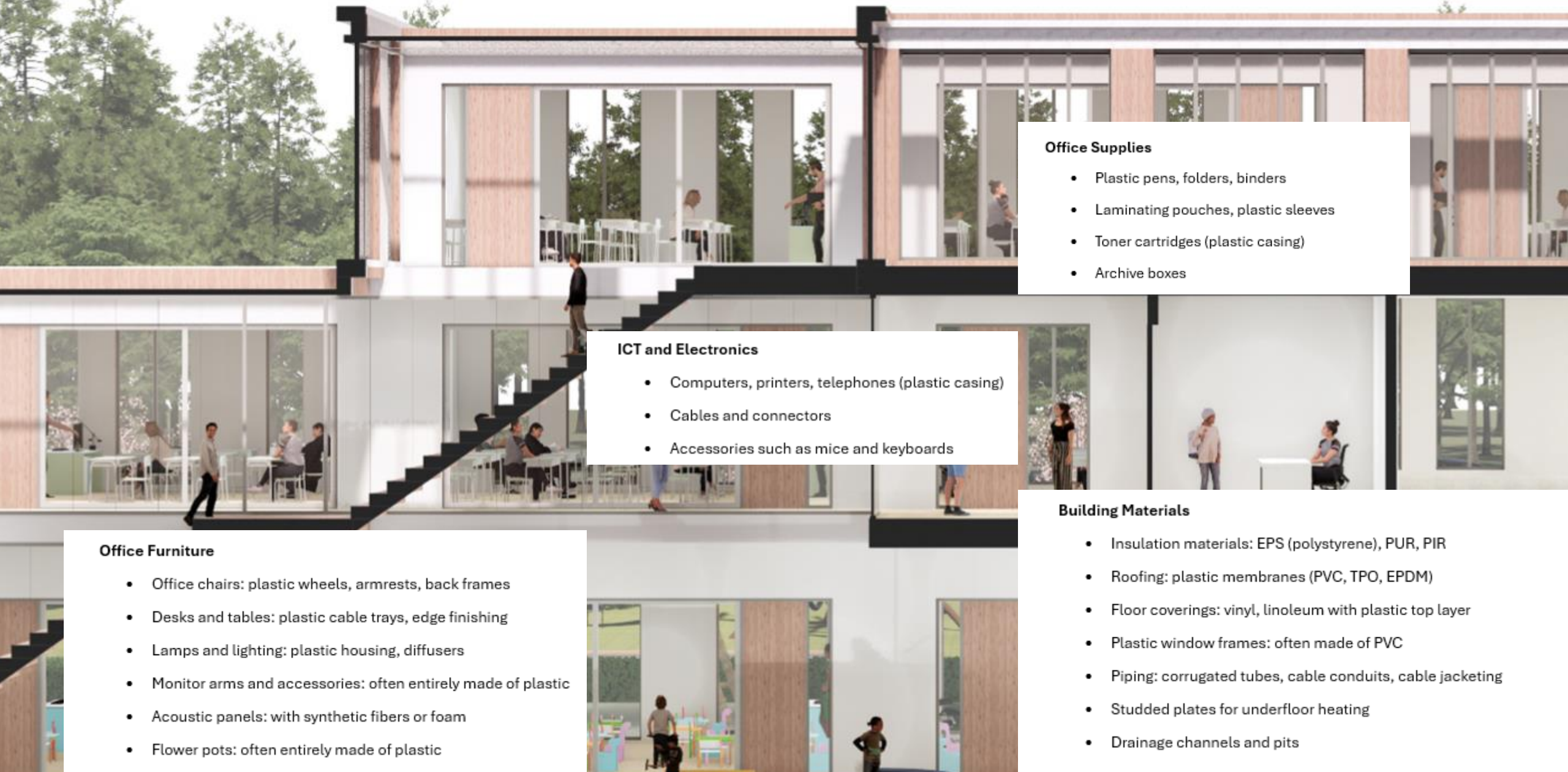
High-end applications is our focus



A few examples



Plastic products municipalities use



Office Supplies

- Plastic pens, folders, binders
- Laminating pouches, plastic sleeves
- Toner cartridges (plastic casing)
- Archive boxes

ICT and Electronics

- Computers, printers, telephones (plastic casing)
- Cables and connectors
- Accessories such as mice and keyboards

Office Furniture

- Office chairs: plastic wheels, armrests, back frames
- Desks and tables: plastic cable trays, edge finishing
- Lamps and lighting: plastic housing, diffusers
- Monitor arms and accessories: often entirely made of plastic
- Acoustic panels: with synthetic fibers or foam
- Flower pots: often entirely made of plastic

Building Materials

- Insulation materials: EPS (polystyrene), PUR, PIR
- Roofing: plastic membranes (PVC, TPO, EPDM)
- Floor coverings: vinyl, linoleum with plastic top layer
- Plastic window frames: often made of PVC
- Piping: corrugated tubes, cable conduits, cable jacketing
- Studded plates for underfloor heating
- Drainage channels and pits

Plastic products municipalities use

Clothing and Equipment

- Safety vests (often made of polyester)
- Workwear with synthetic fibers
- Backpacks, helmets, protective equipment

Vehicles and Means of Transport

- Interior parts of company vehicles (dashboard, seats, floor panels, bumpers)
- Plastic parts in bicycles, scooters, and other means of transport

Infrastructure

- Traffic signs: plastic panels
- Cones and safety barriers for roadworks
- Cable protection: HDPE or PVC sheathing
- Battery boxes and pallet boxes for public works
- Tools for (green) maintenance
- (Street) furniture such as planters, bollards, waste bins, playground equipment and furniture

Thank you