

FINDING THE ALUMINIUM UBCS IN SOUTHEASTERN EUROPE

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Abstract

In 2019 Metal Packaging Europe and the Project Every Can Counts, as part of the *Roadmap for 100% Recycling Rate of Aluminium UBC in Europe*, asked Springloop Coöperatie U.A., the Netherlands (Springloop) and researchers from BOKU University in Vienna to research their missing aluminium Used Beverage Containers (UBCs) in two Danube and three Balkan countries: Slovenia, the Czech Republic, Bulgaria, Greece, and Serbia.

The goal was to determine whether low reported recycling rates for UBCs are due to a **recycling gap**, that is, the official rates report accurately and the system performance is low, or an **information gap**, in which case real recovery rates are more robust than is being reported. An important element of the research was to analyse the role of the informal recycling sector in all countries, and its relation to a recycling and/or information gap.

A combination of micro research using PRA techniques, and macro socio-economic research, resulted in some surprising conclusions:

1. There is some kind of an information gap that differs in nature and extent across the five countries, but it does not appear to be the result of either informal activity or of accidental omissions. The most important element in the information gap is that the PROs are reporting to targets, especially when municipal interest, and motivation to control the PRO activities is lacking.
2. The recycling gap is an accurate reflection of the situation. Real recovery of UBC is low and most aluminium packaging is ending up in landfills
3. The main explanation is that formal institutions tasked with packaging recovery, including the producers and the PROs, are failing to recover their targets, and local authorities are failing to hold them accountable. Poor recycling performance is related to troubled packaging system governance and lack of intrinsic motivation to recycle in countries where disposal fees are low.
4. Private formal and informal value chain activity -- largely by Ethnic Roma men -- makes this gap smaller, not larger: informal collectors in all countries recover some UBC by semi-authorised landfill picking and/or semi-legal extraction of UBC from recycling containers, and sell it directly to the value chains, despite poor information on the value of UBC and inexplicably low prices.
5. The most promising path to reach the 100% UBC recycling goals is based on legalising and regularising the informal and formal value chain activity.
6. The direct recommendation to the client, the metal packaging industry, is to strengthening their direct involvement, pay more attention to pricing, strengthen logistical and promotional support, and thus buy more UBCs
7. There is also a recommendation to study the potential to withdraw UBCs from the formal packaging systems, which have low ambition and accountability, and organise direct packaging recovery via the value chains.