



## Circular plastics in France

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The Netherlands Enterprise Agency (RVO), the Embassy of the Kingdom of the Netherlands in France and the Netherlands Business Support Office in Lyon (NBSO Lyon) commissioned Technopolis in 2021 to conduct a sector study on circular plastics in France. **Circular plastics refers to the transformation of the plastics ecosystem from linear value chains into value networks, from make-take-dispose into design for reuse and recycling (TNO).** The study aims to provide information to help Dutch companies understand and assess market and cooperation opportunities in France (in R&D, public procurement or via European programs). The study relied on desk research as well as interviews with key institutional and industry players.

**France is currently in a transitional phase for the adoption of circular practices in the plastics sector.** The industry is a significant sector in the French economy, accounting for 65 billion euros (roughly 4% of industrial GDP<sup>1</sup>), with 5,000 companies and 230,000 employees. The sector is composed of extremely diverse polymer types, so it is difficult to account for the current level of circularity within plastic businesses. Nevertheless, industry players are bearing witness to an important evolution in the sector's landscape: the price of recycled plastic is slowly declining and becoming more affordable for industry, and the demand for high-quality recycling and sorting technologies is increasing.

At the same time, a dynamic regulatory framework is gradually creating new opportunities for business, with the entry into force of the progressive ban on single-use plastics at the EU level. The AGECL Law voted in 2020 has set unprecedented objectives for the recycling of plastics. By the 1<sup>st</sup> of January 2025, the goal is to reach 100% of recycled plastics. France's national recovery plan ("Plan de Relance") has earmarked 140 million euros<sup>2</sup> to help the plastics sector

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<sup>1</sup> Fédération de la plasturgie (2014).

<sup>2</sup> Please note that this figure was announced in 2021 with the official launch of the Plan de Relance. However it is not a fixed number and may evolve over time.



become circular. Other policy measures for plastics are supported by the Ministry for the environment, ADEME and the Banque Publique d'Investissement (Bpi).

A key objective of the study was to **identify business opportunities for Dutch companies in the circular plastics sector in France**. For a country like the Netherlands with high collection rates and key expertise in chemical plastics recycling, France offers some key strengths: a thriving chemical sector located in the Lyon area, expertise in the plastics sector in terms of materials and processes and a mature and growing demand for recycled plastics.

Research shows that current opportunities for Dutch companies in the French circular plastics sector today are concentrated in both the product design and end-of-life phases. As well as improving the design of products so that they retain their value for longer, it is essential to better capture plastic waste and to increase the quality and quantity of recycled plastics. There are opportunities for collaborative R&D and manufacturing for circular plastics (improved sorting technology, biomass recovery, upcycling). Some opportunities include:

- Producing locally sourced, good quantity and quality Recycled Plastic Material (RPM) for industry. In addition, plastic alternatives, and notably biobased plastics, (Polylactic acid (PLA), starch-based plastics, cellulose based plastics are in demand.
- Improving technological solutions for sorting are needed, by exploring innovations such as infrared or triboelectricity. Strong attention is being paid to chemical recycling as a complimentary solution to mechanical recycling, a field in which Dutch actors excel.

A variety of support tools for doing business in France are available for Dutch companies interested in doing business in France. The Dutch Economic Network in France is the first entry point for companies interested in pursuing business opportunities, but local clusters also provide many possibilities to network and set up matchmaking events.

The whole *Circular plastics in France* study is available upon request (contact: info@nbso-lyon.fr).