

RE CREATE

EuCIA

European Composites
Industry Association



EuCIA

23/04/2026



EUCIA IN A FEW WORDS

■ **EuCIA**

European **C**omposites **I**ndustry **A**ssociation

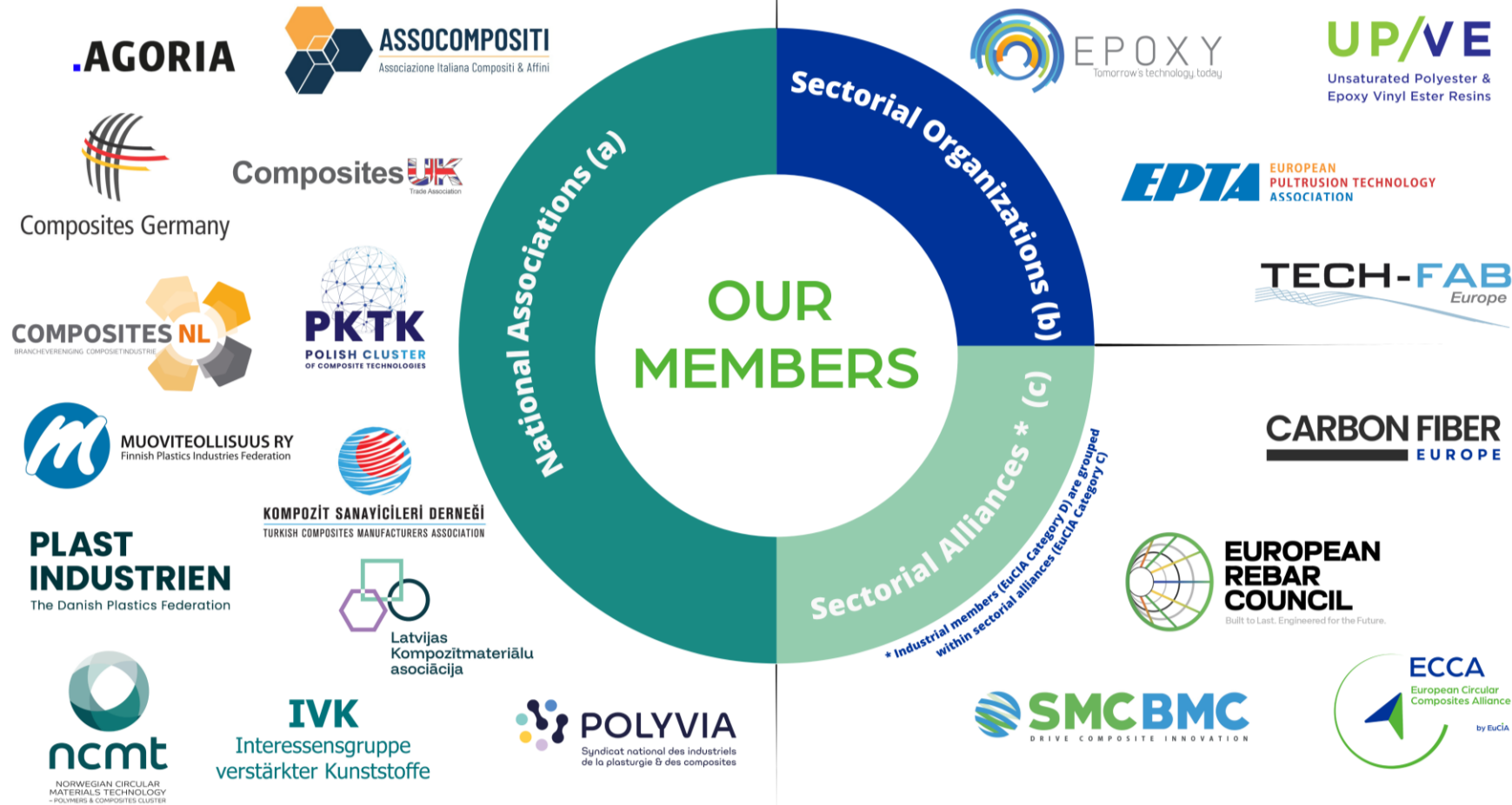
EuCIA is an AISBL based in Brussels, celebrating 65 years in 2025

■ **MISSION**

EuCIA supports the sustainable growth of the European composites industry and promote the development of a flourishing business environment, taking advantage of the combined expertise of all our members



EuCIA MEMBERS



PARTNER **JEC**
CONNECTING THE WORLD WITH COMPOSITES

SPONSORS **AIRTECH** **exel**
EUROPE SARL COMPOSITES

We represents > **85%** of the European composites industry (through National Associations network)

CONTEXT

Composite materials
and circularity

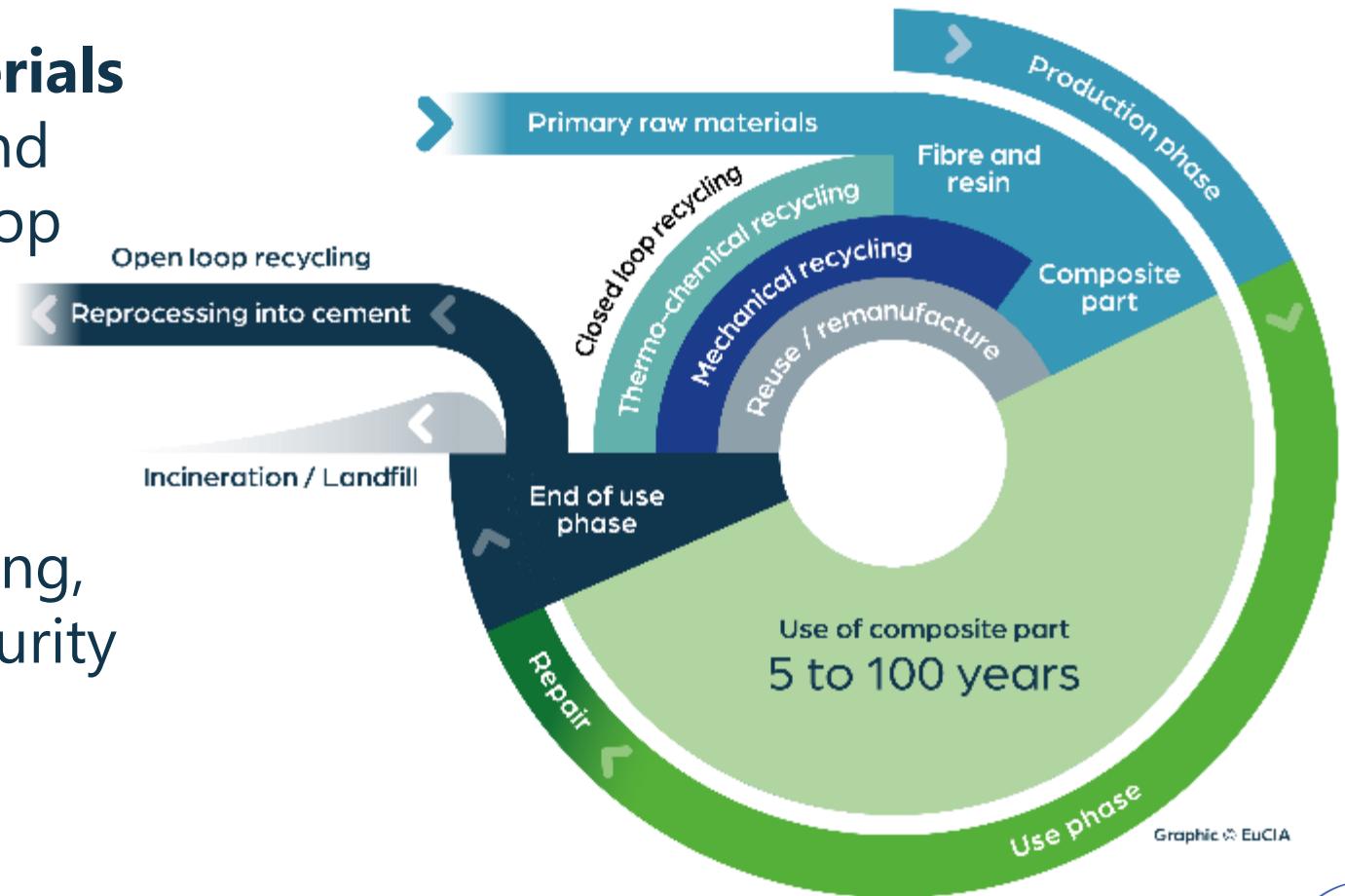


CONTEXT

CIRCULARITY OF COMPOSITE MATERIALS

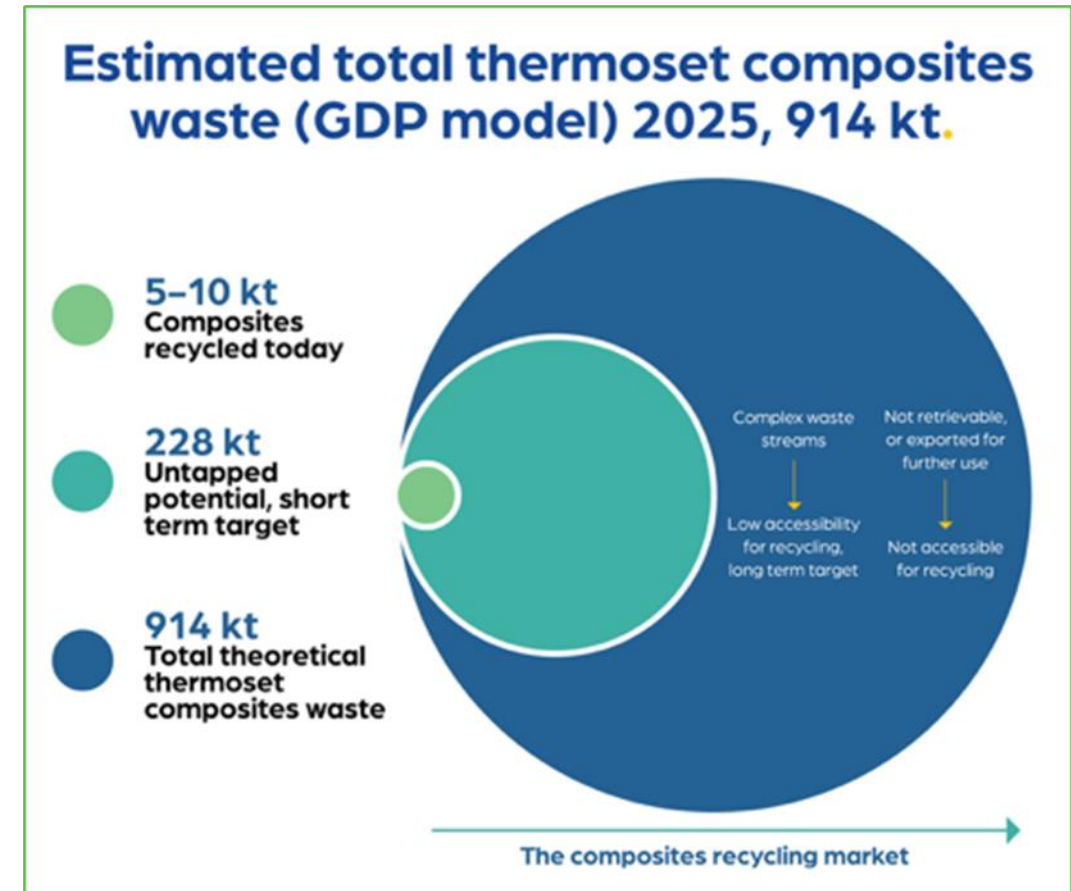
■ Composites are **circular materials** because they are long lasting and can be **re-used** both in open loop and closed loop

■ **Recycling technologies** for composite recycling are increasing, in number and in industrial maturity



END-OF-USE COMPOSITES AS A NEW RESOURCE

- Estimates ~914 kt thermoset composite waste in EU by 2025
- Only ~228 kt accessible for recycling; <5% actually recycled
- Large untapped resource with circular potential
- Need for improved circular ecosystem
- Find out more at:



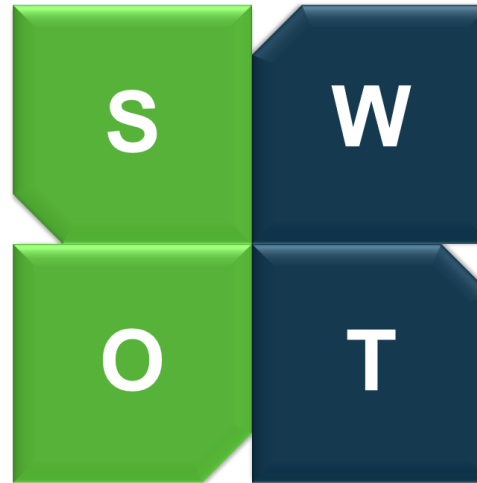
CIRCULARITY OF COMPOSITE MATERIALS : SWOT

STRENGTHS

- Durable, Lightweight
- High strength to weight ratio
- Corrosion and chemical resistance
- Design Flexibility (functions/shapes)
- ISO definitions

OPPORTUNITIES

- Critical materials for Green deal
- Waste becomes resource
- Reduce dependency / EU Supply Chain
- EU regulatory pressure driving innovation (e.g ELV)
- Digital traceability (passport)



WEAKNESSES

- Limited recycling infrastructure at scale
- Lack of harmonisation in Regulation.
- Absence of business case (for now)
- Circularity value chain not organized

THREATS

- Other materials circularity pledges (metals...)
- Public perception (recyclability, ...)
- Recycling products external to the EU
- Cost gap virgin and recycled materials

➔ How to advance the Circularity of Composites?

HOW TO ADVANCE CIRCULARITY OF COMPOSITES?

ACTION

EuCIA (inspired by the CPA initiative) launched ECCA with the support of



ECCA'S SUCCESS

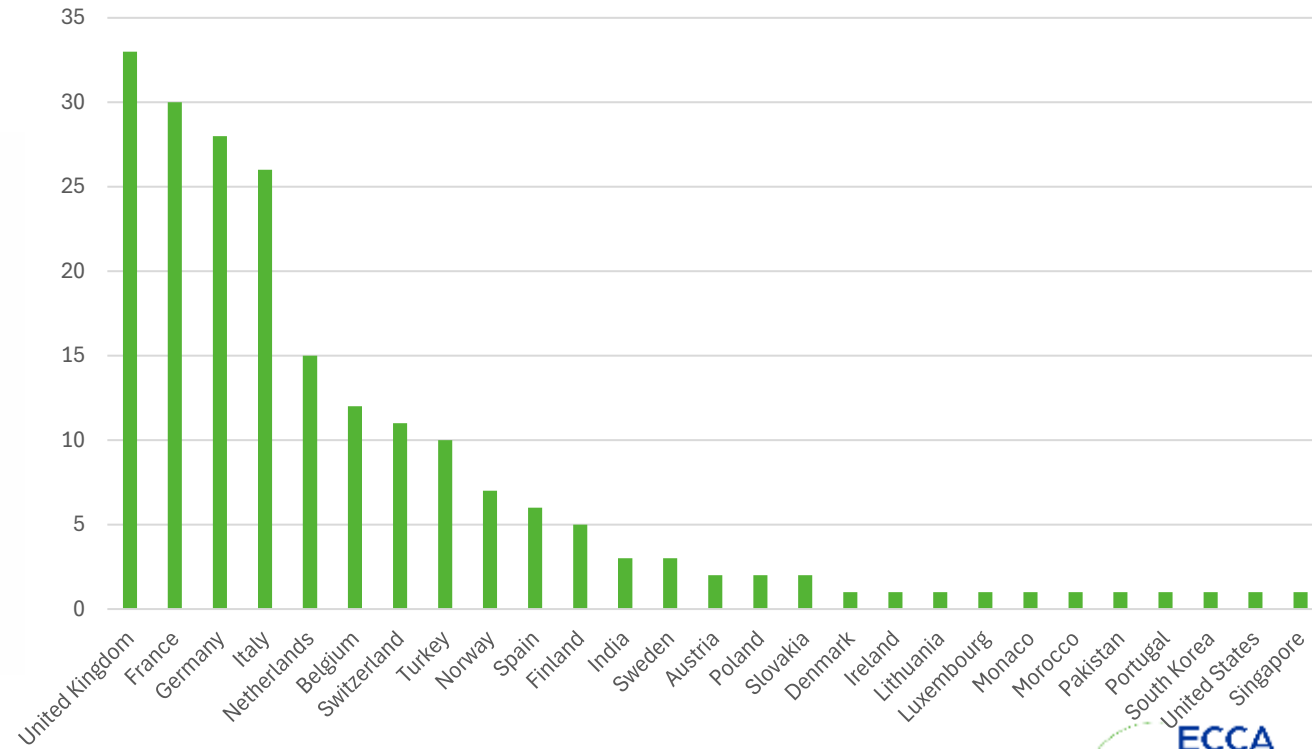
>200 members joined ECCA across Europe
(March 2025 – April 2026)

ECCA Members by category

- Raw materials
- Part manufacturer and OEM
- University and research center
- Recycler
- Consulting and engineering company
- Other (consortium, professional , etc)
- Trade association
- Waste Management

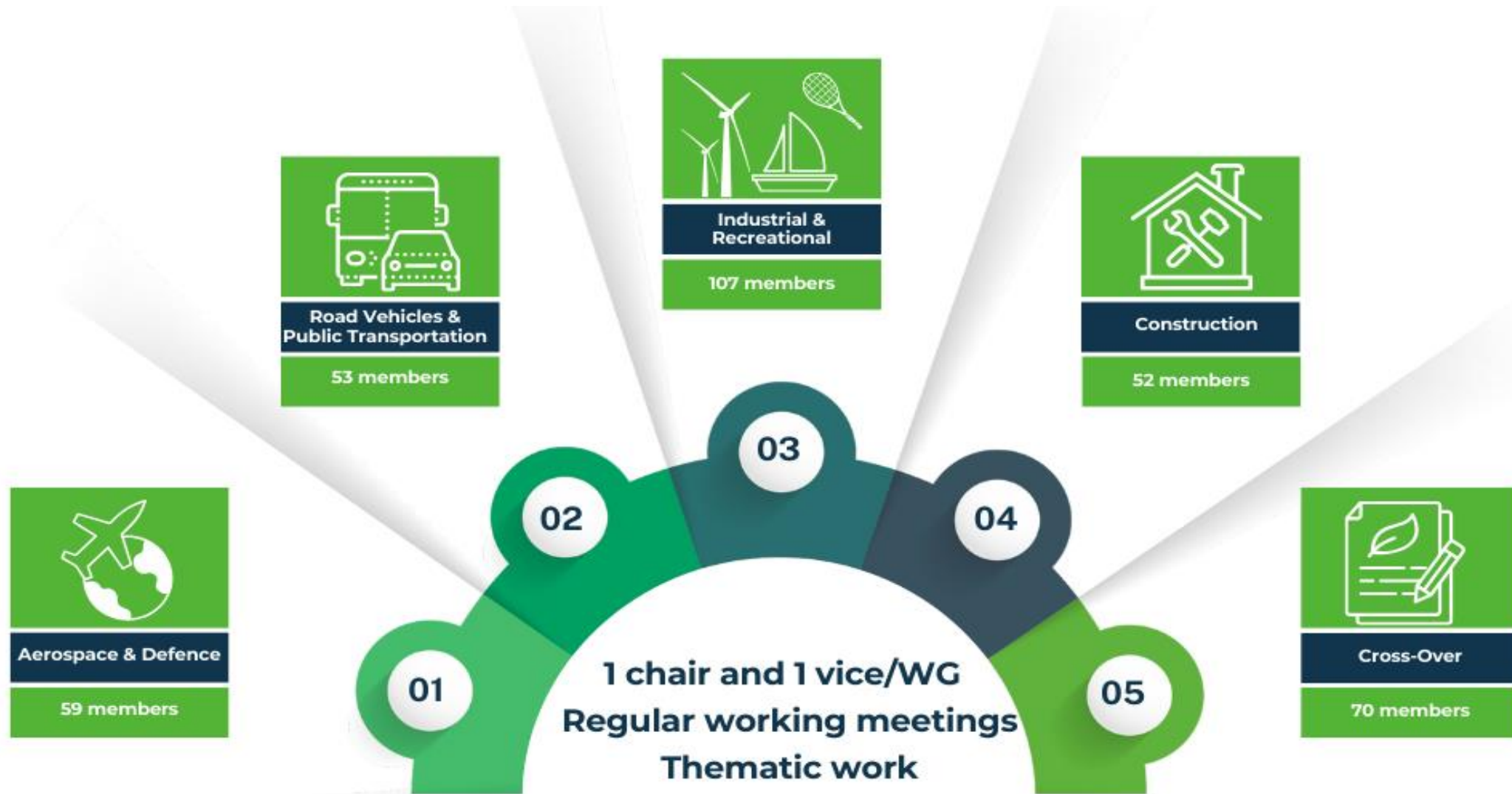


ECCA Members by country



ECCA'S METHODOLOGY : 5 WORKING GROUPS

General structure : 5 Working Groups (WG) to cover the strategic areas of the composites industry



POLICY ASKS

Make composite recycling economically viable



- Ensure fair market conditions for recycled materials (incentives, taxation, market uptake support).
- Simplify and accelerate permits for collection, pretreatment and recycling facilities

Improve waste classification & traceability



- Introduce dedicated waste codes for composite waste (e.g. wind blades, boats, industrial parts).
- Harmonise rules for cross-border movements of composite waste (revise Waste Shipment Regulation barriers).

Ensure technological neutrality in EU Law



- Recognise all recycling routes as valid (mechanical, cement co-processing, thermal, chemical, reuse).

Support scale-Up & ensure a levelled playing field



- Provide EU funding for pilot projects, infrastructure, and industrial scale-up of composite recycling.
- Ensure that EPR obligations apply to imports as well as EU-made products to avoid unfair competition.
- Allow flexibility for strategic sectors where standard EPR rules may not be workable (defence, offshore structures, ...)

THANK YOU FOR YOUR ATTENTION

