

Annex II: Regional differences in recycling

Table shows differences in recycling level within different regions and main difficulties in implementation for a number of Member States. Based on data provided by EEA singular report on Municipal Waste Management (EEA 2013)

Country	Potential to achieve current target	Are all regions in one country facing the same type of difficulties?	Main difficulties in implementation
Austria	Although all regions achieved high recycling rates, there are quite large differences between the regions and especially concerning material recycling and organic recycling.	Vienna region generates the highest amount of MSW but the lowest percentage of material, organic and total recycling (49%). Differences in terms of implemented policies seem to have a role in the difference in achieving recycling and composting targets within the regions.	Low recycling rates in urban territories
Belgium	Belgium has one of the highest landfill taxes and landfill tax increases in Europe, combined with a landfill ban, which seem to have effectively diverted waste from landfill to recycling. Substantial differences in recycling and landfilling performances are reported for the different regions	Brussels Capital Region has the lowest overall recycling (material and organic recycling), reportedly caused by a lack of container parks infrastructure due to the high urban density, and the lowest organic recycling, probably due to the high urbanized environment and small quantity of garden waste. It is argued that temporary storage of organic waste in flats may also be an important barrier for organic recycling.	Low recycling rates in urban territories, caused by a lack of space for containers infrastructures
France	Recycling has increased from 26% of MSW generated in 2001 to 35% in 2010, but significant efforts are required to meet the EU's 50% recycling target for household waste by 2020;	The highest amount of MSW generated in France is located in the Paris region, while the recycling rate has remained relatively low (<20% of generated MSW). The most probable reason for the low recycling performance of the Paris Region is the high density of multi-storey housing, making efficient recycling more technically challenging (space constraints). The Poitou-Charentes region has the largest organic recycling rate, (29% in 2008). This region has a low population density of 68 inh./km ² and is considered semi-rural with a relatively low rate of urbanization. The wide regional differences of waste management performance are an indication that policies have been applied differently at the regional level, and could be explained by the regional cultural differences of	Low recycling rates in urban territories, caused by a lack of space for containers infrastructures Low urbanized area achieved highest rates of organic recycling

		the different regions and by the available budget allocated for waste management in each region.	
Germany	<p>The 2016 target for biodegradable municipal waste sent to landfill was met in 2006; the total recycling target of 50% has been met in 2006.</p> <p>There is a long tradition of national waste strategies and waste management plans in the federal states</p>	<p>Even in a country like Germany with a high level of recycling of MSW, in particular in the region of Hamburg, it is possible to find large regional differences, and give a clear indication of how regional and local policies in Germany have indirectly had a significant influence on the recycling levels of MSW.</p>	Effects of local policies on the territory
Italy	<p>The separate collection rates of MSW are increasing in all the Italian Regions and for all waste fractions. In particular, Italy seems to be on the right path to reach the EU recycling target of 50 % for MSW by 2020. Also, the 2006 BMW target of the Landfill Directive has been achieved by Italy as a whole</p>	<p>Cross-regional differences are huge: in 2010 the national 2008 separate collection target (45%) has been achieved by 7 out of 20 Regions, so that Italy as a whole has not yet achieved the target; in addition, in spite of the increasing recycling rates for BMW, in 2010, the 2008 national BMW target, adopted to implement the Landfill Directive, has only been met by 10 out of 20 Regions. In average, northern regions perform much better than southern regions in terms of separate collection and total recycling. (e.g. in 2010, total recycling (SC) ranged from 9% in Sicily to 59% in Veneto</p>	Effects of local policies on the territory

Netherlands	Recycling is the most preferred option for MSW management in the Netherlands. Already lying at 45% in 2001, recycling of MSW in the Netherlands reached the 50% recycling target given in the Waste Framework Directive, by 2009, eleven years ahead of the deadline;	<p>Limburg has reached recycling levels as high as 60% of MSW in 2008. Although in South Holland the amount of MSW recycled was almost the double of that in Limburg, still the recycling rate is low compared to other Dutch regions, reaching only 38% in 2008.</p> <p>Material recycling is increasing steadily in the Dutch regions: Zeeland has the highest material recycling rates in the Netherlands at 33% while South Holland has achieved a recycling rate of 23%.</p> <p>In organic recycling, there is a big difference (20%) between Drenthewhich has the best performance in the country, and South Holland which is the worst performer that also produces the highest amount of MSW. This could be partly explained by the fact that Drenthe is mainly a rural area where more organic waste is expected to arise and therefore organic waste management systems are likely to have been put in place to enable the recovery of organic matter</p>	-
Poland	An extraordinary effort will be required to meet the EU requirement on 50% MSW recycling in 2020	Differences for total recycling of MSW seem to be linked to differences in recycling of organic MSW, whereas the levels of material recycling only begin to differ significantly in 2009. In the region with the lowest organic recycling (Warminsko-Mazurskie) the level is almost zero, giving a clear indication of how regional and local policies in Poland have indirectly had a significant influence on the recycling levels of MSW.	-

Portugal	Portugal will need to make an exceptional effort in order to fulfill the 50% recycling target of the Waste Framework Directive by 2020	<p>The region with highest generation of MSW (Norte) is always in between the best and least performing regions, following the developments at national level.</p> <p>The differences between regions are significant and show that there are lessons to be learned between the various Portuguese regions.</p> <p>On the other hand, it should be mentioned that there are limitations in how good practices among regions can be transferred. For example, in urban regions such as Lisboa it is technically and economically more feasible to establish and maintain higher levels of recycling than it is in rural areas.</p>	-
Slovakia	The total recycling rate of MSW is still very low. According to present trends, an exceptional effort will be required to meet the EU requirement of 50% MSW recycling in 2020	<p>Regional differences in total recycling of MSW are not so large, whereas those in material and organic recycling are higher. Data suggest a clear indication that regional and local policies in Slovakia have had a reasonable influence on the recycling levels of MSW, with preferences for material recycling in some regions and for organic recycling in others.</p> <p>Around 7% of municipal waste is collected selectively. Existing recycling infrastructure is sufficient, but separate collection systems need to be improved further</p>	-
Slovenia	The majority of MSW generated in Slovenia is still landfilled, but according to present trends, Slovenia is on track to fulfill the 50% recycling target of the EU Waste Framework Directive by 2020	The differences between regions in material and organic recycling rates are considerable. Differences in total recycling are considerable as well, and are linked to material recycling as organic recycling is very low	-

United Kingdom	There is a high level of confidence that the 50% MSW recycling target will be met by 2020, but slightly lower confidence about meeting the 2020 Landfill Directive target. This is in part due to concerns over the time available to build the necessary recycling and recovery facilities for organic wastes.	Large variations in recycling rates are seen at the regional level The recycling rates across regions in the UK do not present an even scatter. Inner London stands completely alone at the lower end of recycling rates. The next poorest performer, West Midlands has a total recycling rate (31%) nearly double that of Inner London (16%) and the highest amount of average waste produced.	-
Bulgaria	Recycling and waste management implementation started too late to allow Bulgaria to catch up with other Member States and reach the 2020 targets within the given time.	No regional data exist; but since Bulgaria achieved 0% recycling in 2010, it is assumed that all regions will face similar difficulties in the implementation of the waste targets, especially related to the existence of too many non-compliant landfills still operating, and existence of numerous illegal dumpsites	Implementation issue similar for all region, due to lack of waste management systems and reliance on landfilling
Croatia	Recycling of MSW started recently and is still low at 4%	No regional data exist; but since Croatia achieved 4% of recycling it is assumed that all regions will face similar difficulties as to increase separate collection and to develop the infrastructure for recycling MSW.	Implementation issue similar for all region, due to lack of waste management systems and reliance on landfilling
Cyprus	Cyprus will need to make an exceptional effort in order to fulfill the 50% recycling target of the Waste Framework Directive by 2020	No regional data were available. Anyway, the waste management system in Cyprus is constrained by the lack of appropriate facilities to treat waste or hazardous waste (for example, there are no waste incineration plants in Cyprus). As a result, the overriding option for MSW management is landfilling which takes up around 80 % of the generated	Implementation issue similar for all region, due to lack of waste management systems and

		waste.	reliance on landfilling
Czech Republic		No regional data on waste management exist; still, landfilling is the predominant waste treatment option .The main reason is that it is economically more attractive, as landfilling is still much cheaper than recycling or incineration. There is also an insufficient capacity for other forms of waste management, (although some have gradually been built up in recent years, sometimes with the help of EU subsidies.	Implementation issue similar for all region, due to lack of waste management systems and reliance on landfilling
Estonia	2013 target for biodegradable waste has been met in 2009, but some concerns are raised that Estonia will be able to reach the 50% recycling target in 2020	The level of recycling is not directly depending on the national recycling capacities. As a small country, Estonia will always find it difficult to reach 100 % domestic recycling capacity, and this would always be a huge economic challenge. The main barrier to recycling has been soft supervision of the existing targets and lack of enforcement	Possibly: technical / fiscal impossibility to reach 100% targets
Greece	In Greece more than 80 % of MSW was landfilled in 2010 and consequently the target of 75% reduction of BMW by 2010 of the EU Landfill Directive could not be fulfilled, despite the 4 year derogation period granted to Greece; Similarly, organic recycling is still very low at about 1%	Assumed that majority of the country still needs to implement proper waste management systems	Implementation issue similar for all region, due to lack of waste management systems and reliance on landfilling

Hungary	The country's performance in terms of MSW recycling has been improving dramatically over the last decade from close-to-zero (2% in 2001) to 21% in 2010, while at the same time MSW generation has decreased by 13% and decoupled from economic growth over 2001-2010.	In spite of the differences observed in waste generation and the role of the single incinerator in the central region, there is no major difference in the recycling levels. Material recycling is between 12-19% all over the country given some differences in the achievements of the separate collection (data 2008).	-
Ireland	The majority of MSW generated in Ireland continues to end in landfill. However, the landfilled share of MSW reduced significantly from 77% in 2001 to 53% in 2010. Recycling (material and organic) of MSW increased dramatically over the same period	Given the small national territory and population, as well as arrangement of waste management facilities, waste data in Ireland is reported on a national basis. Anyway, lack of regulation and control of the waste collection market in Ireland partially undermines the potential for Ireland to meet policy objectives	lack of regulation and control of the waste collection market, too much reliance on landfilling
Luxemburg	The EU Waste Framework Directive's target to recycle 50% of MSW are very likely to be met before 2020, if efforts to increase MSW recycling are sustained	Luxembourg is the smallest Member State in the EU after Malta. The country is generating one of the highest amounts of municipal solid waste in Europe per capita (678 kg/inhabitant in 2010) but has one of the highest rates of separately collected MSW. It is planned not to build further landfill nor incineration capacity	No relevant issues reported (can be example/ best practice)

Malta	The projection in Figure 2.2 clearly shows that Malta would need to make an exceptional effort in order to fulfill the target of 50% set out in the Waste Framework Directive	Small MS. An important parameter that affects MSW arising in Malta is the considerable tourism sector, which constitutes a large share of the national GDP (NSO, 2011). The 2003 NSO Hotel Waste Survey indicates that, on average, a tourist generates almost double the waste generated by a Maltese resident	Big fluctuation in waste generation, as this is directly related to tourism affluence
Romania	Recycling of municipal waste has started recently and the recycling rate is still very low (2%)	The main challenge is to develop the infrastructure for recycling of municipal waste; Differences in the regional recycling levels in Romania have been reported, but they are not substantial. The overall level of recycling is very low in all region	Implementation issue similar for all region, due to lack of waste management systems and reliance on landfilling