



# Needs Analysis 2021

Circular economy in the Baltic States: Methodologies and Approaches in Waste Management - Prevention, Recovery and Recycling of Waste in the Context of the Relevant EU Directive 2018/851

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## Summary

As the analyses of the Baltic countries show, all three countries are underperforming among the European Union member states in most statistical areas of circular and waste management. On a political level, measures are taken to improve the situation and some development can be observed every year, but in most cases, it is clearly too slow to reach the ambitious EU targets in circular and waste management. Apart from these targets, the Baltic States are also faced by country-specific problems. In some areas of waste management, the situation in the Baltics urgently needs to be improved in order to remain competitive at the European level.

According to the EU Waste Framework Directive 2018/851, preparation for reuse and recycling of municipal waste should reach at least 55% in all EU countries by 2025, 60% by 2030 and finally 65% by 2035. Statistics show that currently only Lithuania is approaching this target and reuses or recycles nearly 50% of municipal waste annually, while Latvia is just over 40% and Estonia is only at about 30%. In comparison, Germany was able to reach the 2035 target as early as 2014 (see Table 29) and can thus serve as a role model for the Baltic states in how to effectively deal with the issue of reuse and recycling of municipal waste.

In addition, the population in all three Baltic countries needs to be informed and sensitized in matters of recycling and waste management so that society - especially in rural regions and smaller towns - separates waste voluntarily and with motivation. This can make an important contribution to improving the processing or recycling of municipal waste. Many people still lack the awareness that they can make an important contribution to solving environmental problems with their personal efforts in everyday life.

Apart from increasing the reuse and recycling of municipal waste, Estonia needs to take serious action in the oil shale industry. It has long been seen as crucial to Estonia's energy security, but it is also the main source of environmental pollution, especially air pollution and waste generation.

Latvia will finally introduce a uniform deposit system for plastic bottles in February 2022, which is seen as a major step in waste separation and recycling. But more steps should follow to ensure that waste volumes in Latvia do not continue to increase each year and that waste is collected and separated more effectively. In general, the infrastructure for waste recycling and preparation of waste for reuse in Latvia should be expanded or modernized.

When it comes to recycling, Lithuania is the frontrunner in the Baltics. In particular, plastics recycling, with a recycling rate of over 70%, is a success story in Lithuania - no other country in the EU has achieved a better result in this regard as of 2018. In contrast, the situation of recyclable waste is problematic. Much of the waste generated in Lithuania is recyclable or suitable for energy generation but is stored in landfills or incinerated. In the coming years, the infrastructure for waste sorting and preparation for processing must be further expanded and modernized.

Based on the findings of this needs analysis, which constituted the first phase of the project and was carried out from September to December 2021, suitable measures are to be taken in the further phases of this project in order to be able to improve the situation of the waste and circular economy in the Baltic States in the long term. In the second phase of the project, a workshop will be organized and conducted until the

end of May 2022, bringing together industry representatives from all three Baltic countries, as well as experts from Germany, to develop possible solutions based on the needs analysis and discuss them together. As Germany is one of the leading countries in the EU in the waste management sector, the workshop will allow Baltic countries to further develop and train their knowledge and already existing systems of waste and circular economy.

In the third phase of the project, a study tour of Baltic companies to Germany will be organized and conducted by the end of August 2022, so that there is an opportunity to learn about German technologies on the ground and establish potential new business relationships with the respective German companies. Both Baltic and German stakeholders would benefit from this. German companies could expand their partnerships abroad, while the Baltic countries could accelerate the development of waste management through modern German technologies and know-how.

Through the project, methodologies and approaches will be developed through smart technology solutions to strengthen Baltic waste management in the future. A strategy for future activities is to be formulated and a long-term knowledge and technology transfer is to be secured in order to achieve a sustainable development of the waste and circular economy in the Baltic States over the next years.