



EUROPEAN CIRCULAR COMPOSITES ALLIANCE

1st Working Group Meeting

August 2025

WELCOME



To ensure a smooth and engaging session, please follow these guidelines :

- *Comply with ECCA rules, Respect the EuCIA Antitrust Code of Conduct and Ethics and comply with EU Competitions laws.*
- *Keep Your Microphone Muted.*
- *Feel free to ask your Questions in the Chat. Response to some questions may be provided at a later time*
- *GDPR Notice : By participating, you consent to the recording and processing of your data for the purposes of the webinar.*

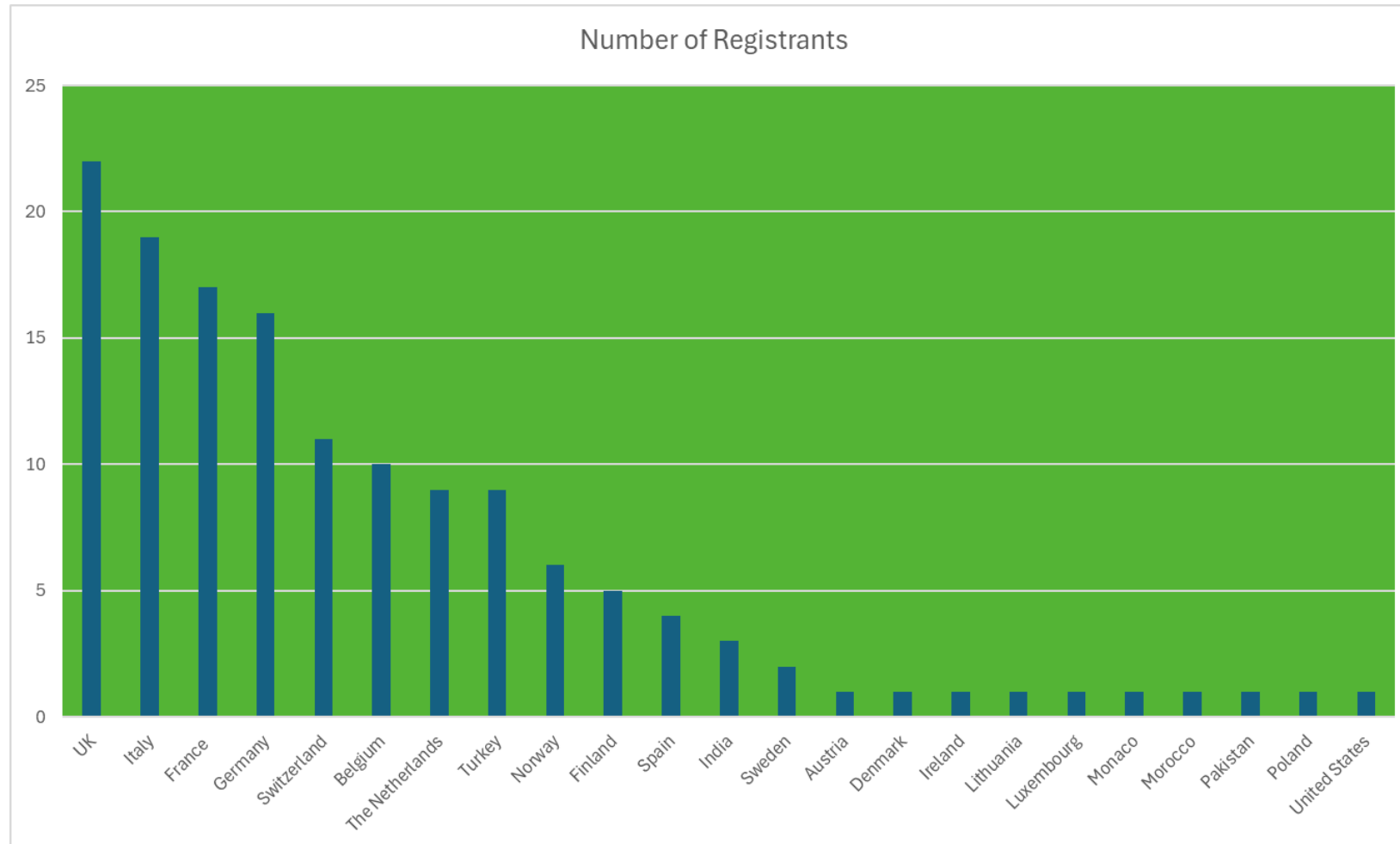
Thank you for your cooperation !

Outlook

- Objectives of ECCA
- The role of EuCIA
- The Working Groups
 - Develop tailored solutions for different compositions/markets
- How are WGs managed?
- What do we know?
 - Basic knowledge package provided by EuCIA's WG "*Sustainability*"

ECCA Members by Country

143 signatories

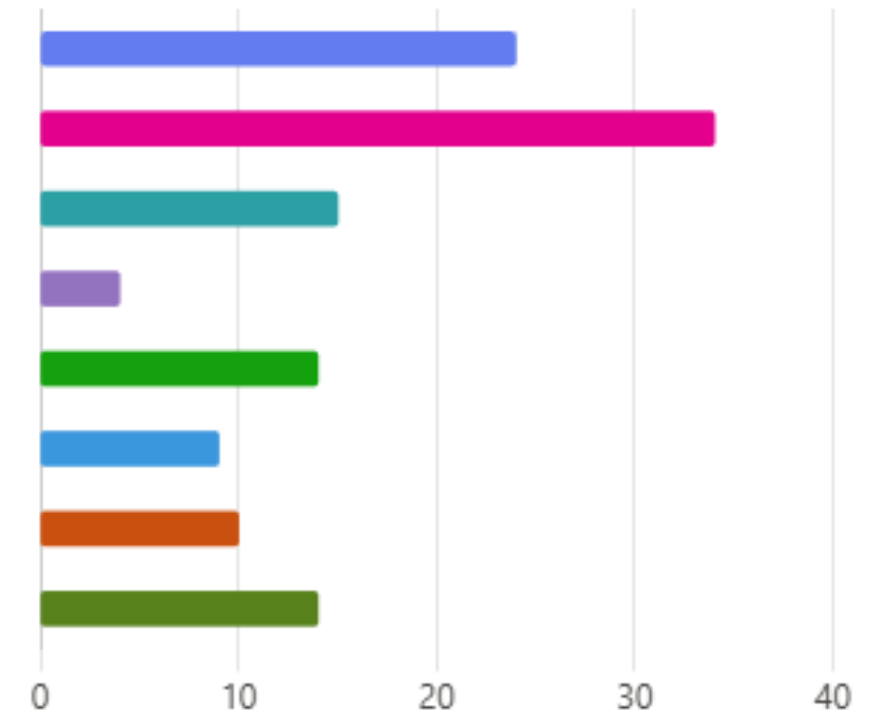


ECCA Members by Working group

	Aerospace & Defence	30
	Road Vehicles	36
	Industrial & Recreational	75
	Construction	29
	Cross over	46

ECCA Members by Category

● Part manufacturer and OEM	24
● Raw materials	34
● Recycler	15
● Waste management	4
● University and research center	14
● Trade association	9
● Consulting and engineering company	10
● Other (consortium, professional, etc.)	14



Our Mission

(as the community of composite materials in Europe)

Let's take control of our own destiny

- Composites are genuinely circular
- Composites are essential contributors to society
- Composites are important for the net-zero transition



ECCA Mission *(based on Declaration)*



Advance the circular economy for composite materials by:

- Bringing together all stakeholders
- Driving collective action
- Speaking with one voice to the external world

ECCA Mission *(based on Declaration)*



Which means:

- Prove that composites are valuable resources for the circular economy
- Facilitate composite materials conservation through proper supply chains
- Identify and resolve barriers to increase the use of recycled materials in new products
- Develop circularity strategies and design guidelines
- Align with EU regulators

Objectives *(based on Declaration)*



- **Promote public awareness** of the benefits and value of recycled composites
- **Foster voluntary pledges** from industry to **use recycled composites**
- Set-up **design for circularity** and recycling guidelines
- **Develop standardized methods**: LCA; quality of sorted composites waste, supply chain
- Create a **harmonized EU monitoring** system for traceability of recycled composites
- **Mobilize investment** into recycling and R&D infrastructure; public and private

How? activate **dedicated WGs** to coordinate actions

Deliverables *(based on Declaration)*



- **Increase circularity of composites and realize the full potential of recycled composites:**
 - **Enhance the uptake of recycled composites in products** ensuring their safety and quality by **setting and working to targets**
 - **Improve** collection, sorting, and recycling rates
 - **Optimise waste codes** to enable best solutions to develop
 - Aim to **significantly reduce landfilling** of composites **by 2050**
- **Identify and resolve** legal, economic, and technical barriers to composites recycling
- **Enhance environmental protection** by reducing raw material extraction
- **Publish** annual progress results from Working Groups

Inputs from EU Commission

Laure Baillargeon (DG Grow)



- **Policy Alignment** is Crucial: ECCA is seen as a dialogue platform

ECCA should **align with EU policy priorities** (e.g., the Clean Industrial Deal, Circular Economy Act) to enhance visibility, impact, and policy influence → **a contact point for the Commission**

- ECCA as a **valuable interface**, capable of structuring dialogue and aggregating views.
 - Voluntary Alliances for **dialogue** with EU Authorities
 - Voluntary, bottom-up initiatives **can act more quickly than legislation**
 - Play **a vital role** in **preparing future regulations**.

The Working Groups

Solutions will be dependent on:

- **Composition** (resin/fiber type, fiber content, value, etc.)
- **Market** and logistic
- **Regulatory** constraints
- **Quality** and consistency of the products

It is recommended that each WG starts with the least common multiple for **first product/market entry**
(an "easy" entry as a basis for success ...)

Working Group Name

	WORKING GROUP NAME	DESCRIPTION / CONTENT
	Aerospace & Defence	
	Road Vehicles	Car, Truck, others
	Industrial & Recreational	Wind blades, Boats, Train, Electric, Sports & Leisure, Pipes & Tanks
	Construction	Structural elements (bridges, panels, claddings, window frames...)
	Cross over	Policy, Regulation, Investment, Monitoring, Metrics and Reporting

How will the working groups be managed?

- Role of EuCIA
- WG Basic rules
- Start from knowledge package developed by WG Sustainability

Role of EuCIA

- Acting as coordinator of the WGs
- Legal representative / Respect compliance
- Administrative tasks (invitations, Minutes)
- Coordination between the WGs
- Share previous knowledge with the WGs

WGs basic rules

- Governance

- Chair and vice-Chair
- Secretary (EuCIA for the time being)

- Reporting

- To the Steering Committee (Composition: 5 WG Chairs + EuCIA President + EuCIA Managing Director + 1 representative of the EuCIA Sustainability WG)
- To General Assembly (Composition: all signatories)

- Objectives and scope

- Define the mission: what problems are to be addressed?
- Set specific objectives: work against targets
- Agree on deliverables and deadlines

Job description of ECCA Chair:



lead the WG's activities with WG secretary's support

- Member of the ECCA steering Committee
- Preparing draft document to be reported to ECCA Steering committee (ESC) or Subcommittee
- Convening meetings, acting as the meeting chairperson
- Ensuring the correct composition of the WG for the task
- Circulating documents via the electronic platform, seeking clarification from the ESC when needed
- Ensuring the work is completed within the specified timeframe

The Vice-chair is replacing the chair, during his absence, with the same role

Today's tasks

- Elect a Chair and vice-Chair
- Agree on reporting mode
- Define specific missions for the market segments involved
- Preliminary discussion of objectives
- Set the dates of 2025 WG meetings

1st ECCA General Assembly, Brussels, December 3 or 4, 2025 (to be confirmed)



- 9h30 : Welcome Coffee break
 - 10h00 : Opening by Prof Roberto Frassine
 - 10h10 : EU Commission introduction speech (30 min)
 - 10h40 : Networking break
 - 11h15 : Presentation of WG 1, 2 and 3
 - 12h30 : lunch break / Networking
 - 14h00 : Presentation of WG 4 and 5
 - 14h45 : Wrap up
 - 15h30 : Closing of the event
 - 15h30 – 16h30 : Networking session
-
- **Please confirm your participation before Sept 5th, following the below link**

<https://forms.office.com/e/8Y1fnGes1n?origin=lprLink>

By submitting this form, you agree to the processing of your personal data under GDPR



What do we know?

“Knowledge Package”

provided by EuCIA's WG Sustainability

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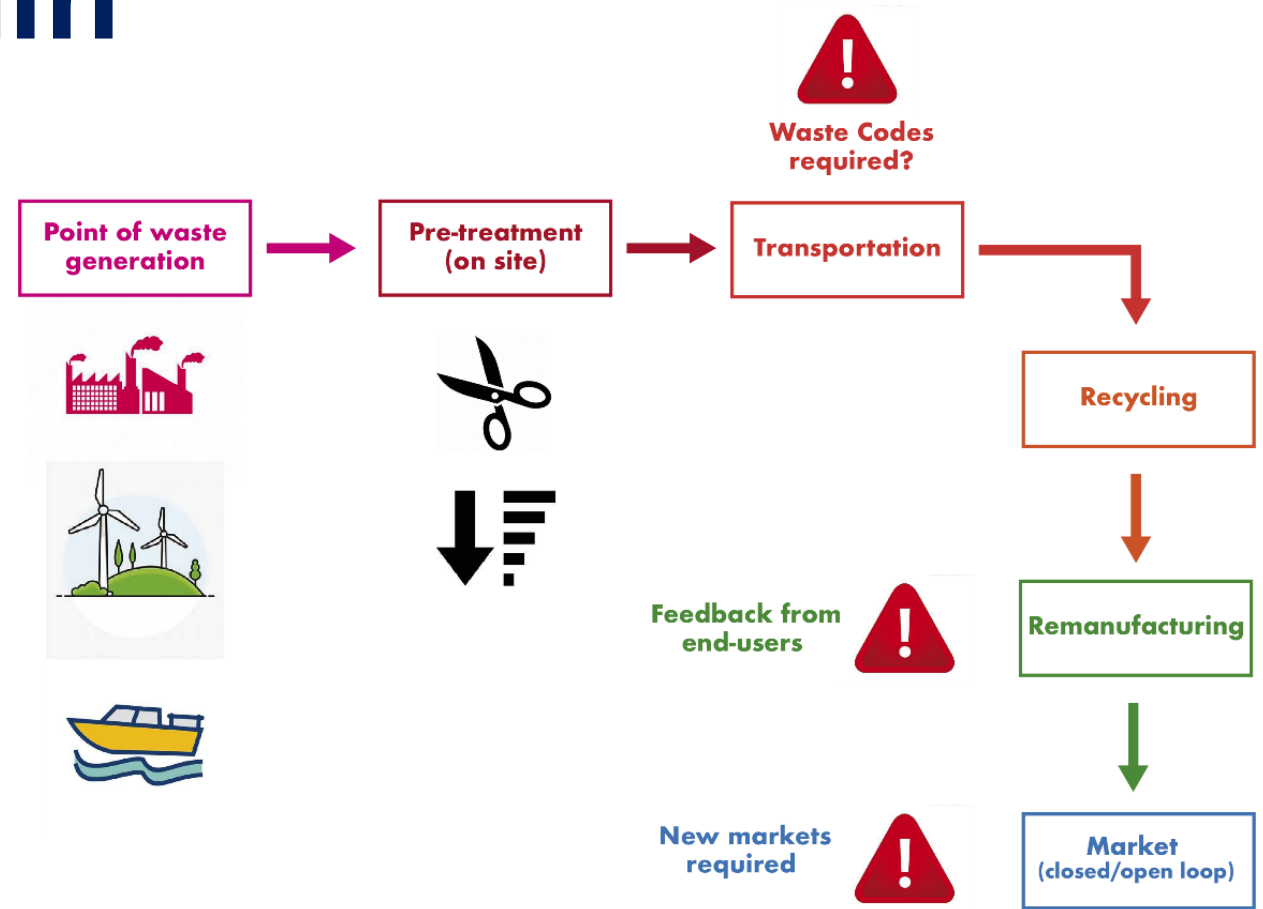
Chapters	Title
1	Executive summary
2	Objective and context
3	What are composites
4	Market figures
4a	EuCIA Composites waste estimate
5	The Importance of Composites for the net-zero transition
6	Composites and the circular economy
7	Case studies
8	What would the world look like if we eliminated composites
9	Taking Composites circularity to the next level
10	References
ANNEXES	Title
A1	Circular terminology definitions – Glossary
A2	Recycling processes for Composites
A3	Analysis of the different recycling processes
A4	Cradle-to-gate LCA analysis of Composites : EuCIA's eco impact calculator
A5	LCA analysis of recycling processes
A6	Analysis of recycling technologies through JRC model

The barriers to a well-established circular value chain

A. Collection, sorting and **transportation** of waste

B. Remanufacturing of **recycled products** (*to transform them into secondary raw materials*)

C. Promoting and creating **end-use markets** for the secondary raw materials



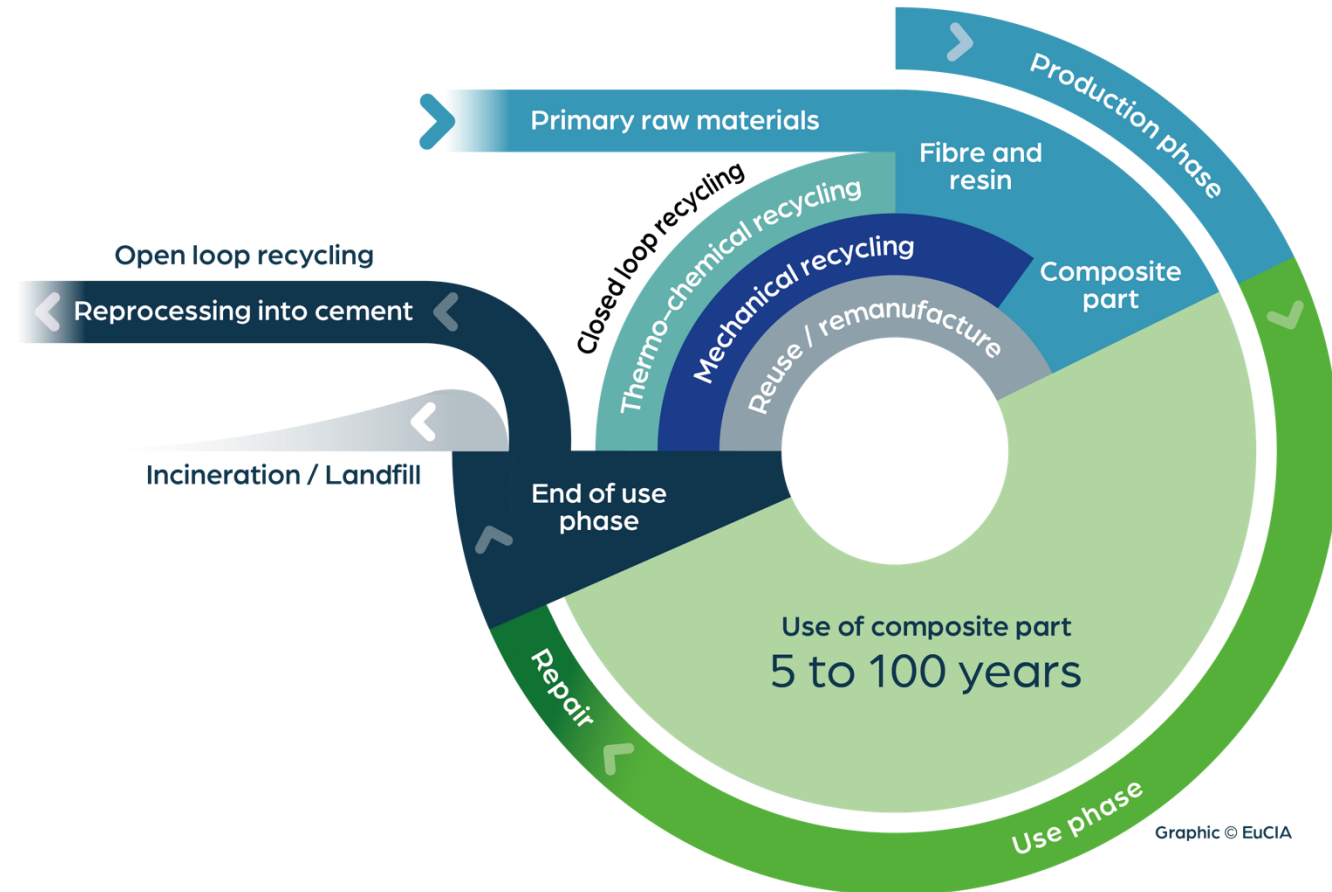
Composites are made to last

- Enable **advanced and flexible lightweight design**, are **durable**, require low maintenance and enable **key applications**
- Provide a **long service life**
- Are indispensable materials to society
- Support **EU Green Deal**: net-zero transition



Composites are Genuinely Circular Materials

- Many **recycling technologies** are already available, and more are under development
- Composites are **circular materials** because they can be **re-used** both in closed loop and open loop applications/markets
- Find out more at:



Graphic © EuCIA

Composites for the Net-Zero Transition

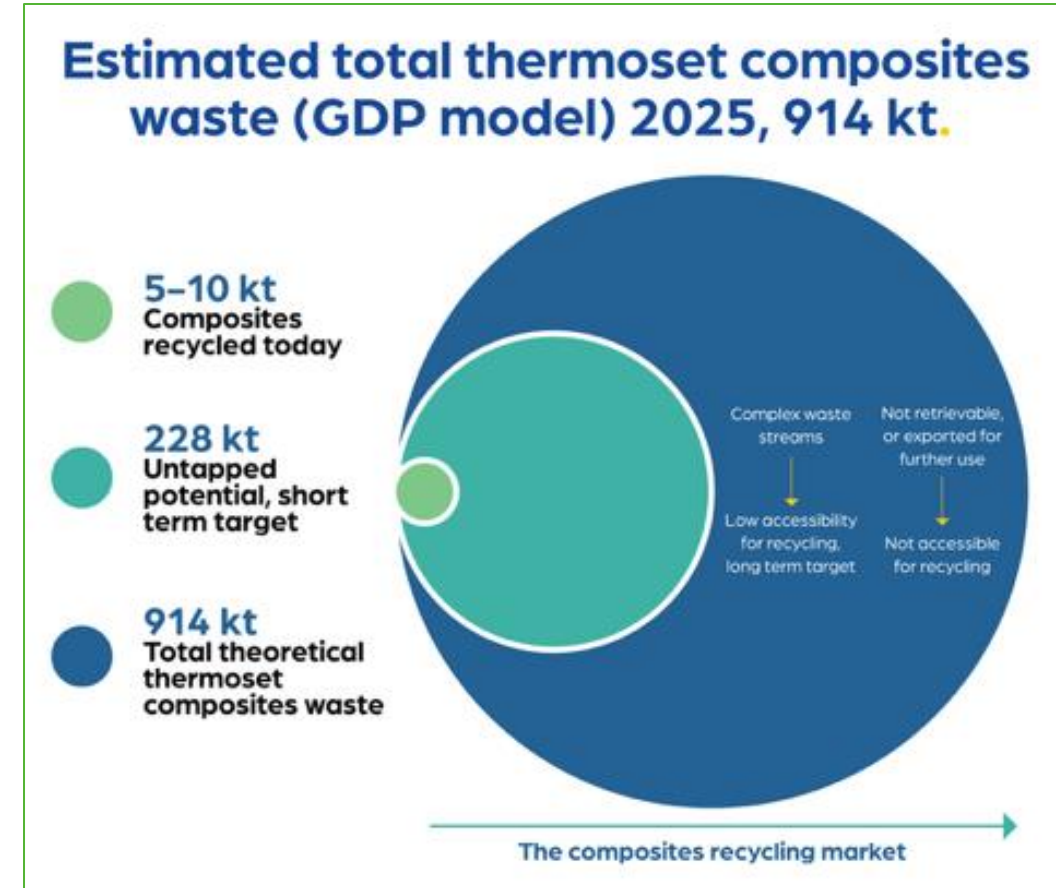
- Support net-zero targets and EU Green Deal goals by
 - Low weight and long life enable low carbon footprints
 - Reducing emissions in transport, energy, infrastructure and uniquely enabling essential applications through material and process technology
- Re-usable End of Life parts and materials
 - reduces need for primary resources

- Find out more at:

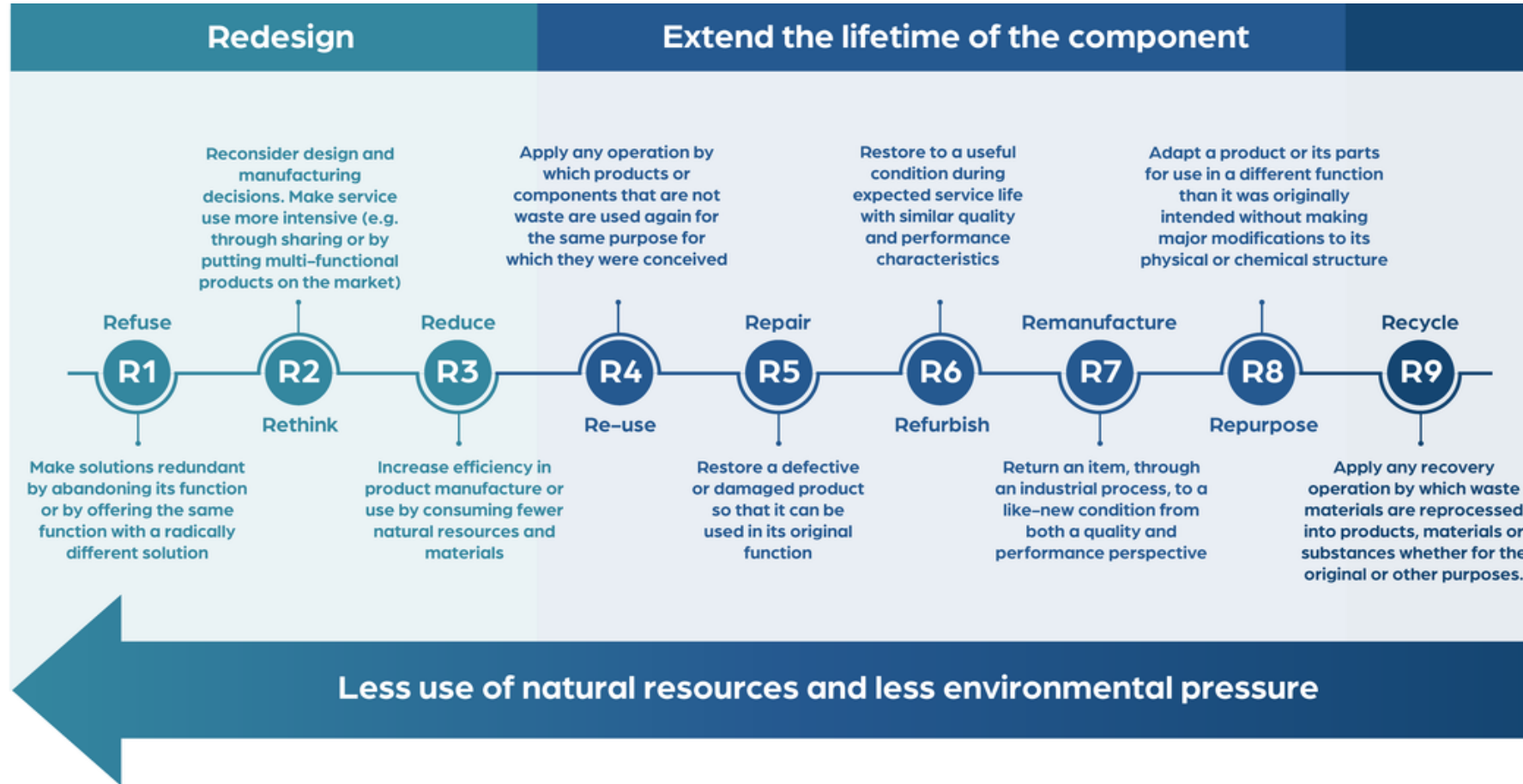


End-of-Use Composites as a New Resource

- 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 End of Life parts and materials



- Find out more at:



The need for a common language

Definitions

- **ISO 59004** and the European **Waste Framework** Directive are bases for definitions
 - Example: **Closed Loop** Definition: system by which *products* or *resources* are used and then recovered and turned into new products or *recovered resources*, without losing their **inherent properties**.

This means :

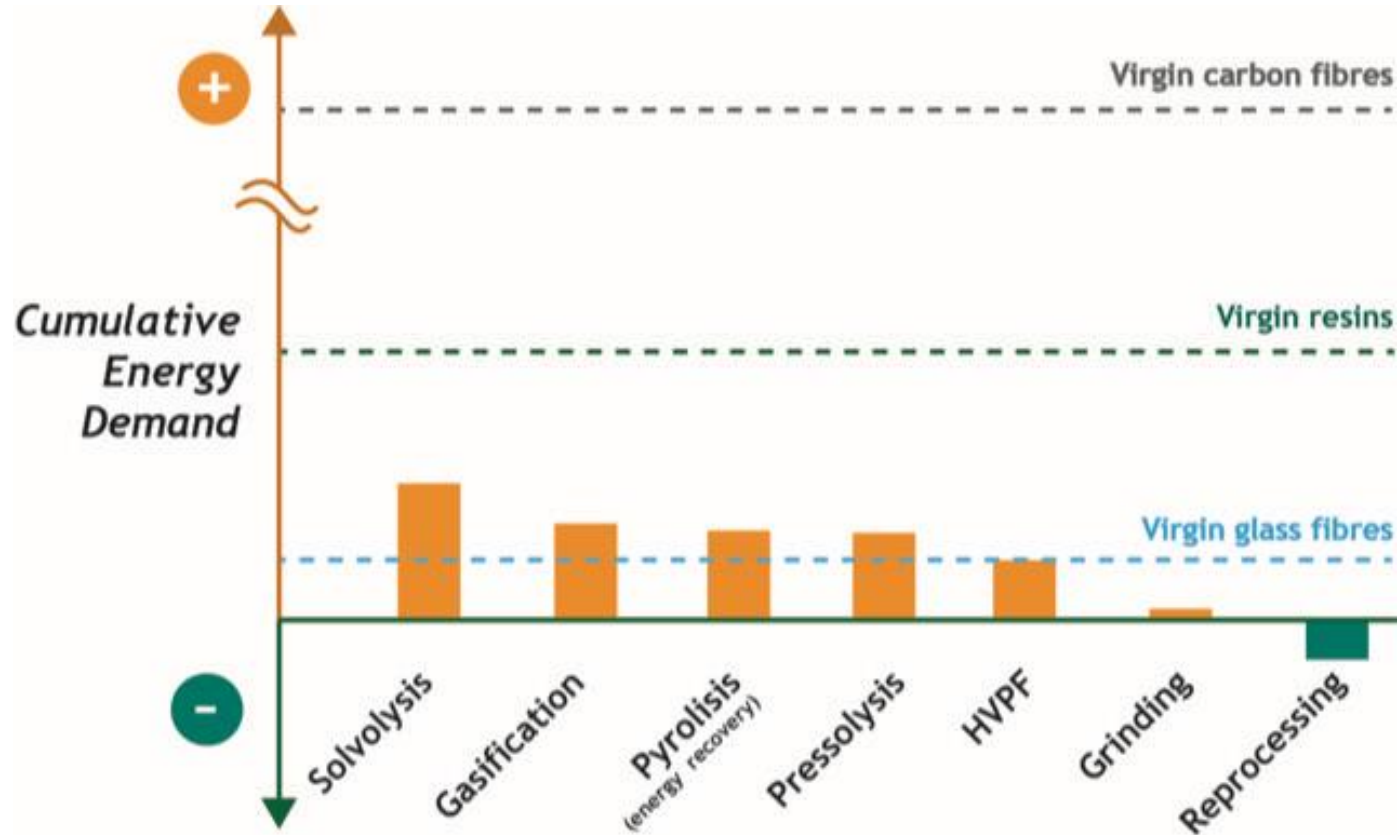
- **Maintain intrinsic composite properties** for a holistic approach
- **Material-oriented** – *not application-oriented* – definition

- Find out more at:



Choose the right EoL processes!!

Estimated energy demand versus virgin raw materials footprint



- LCA footprint for **GFRP** and **CFRP** quite different
- there is a clear added value in **re-deploying** composites
- tailoring of technologies for cost and sustainability

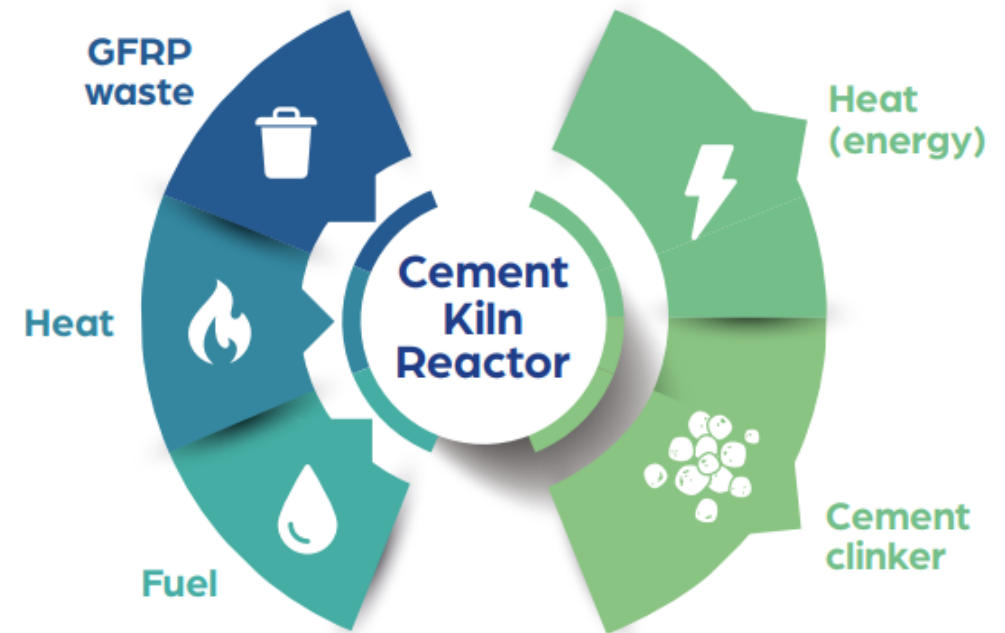
Getting value from End-of-Life Composites

Reprocessing in cement

- Cement re-processing is sustainable recycling with a **very positive LCA**
- Fossil fuels and raw materials are replaced – **resource savings**
- Route is **scalable** and CO₂-efficient
- **Industrial capacity** already available
- Find out more at:



Reprocessing end-of-life composites in cement production.



Summary: Circularity of Composites

- Composites are **genuinely circular** and can be recycled through both **closed and open loop** processes, but...
- There is a **lack of scale solutions**: technologies, regulations, applications....
 - Large difference between LCA footprint GFRP and CFRP
 - Composition and market segment call for tailored recycling solutions
 - Additional solutions are needed beyond technology...

SHARE POINT

- You will receive an invitation by email
- The invitation will ask you to create your password
- Once your account is activated, you can log in to SharePoint
- You will have access to the dedicated SharePoint site of your Working Group. Documents and collaboration tools will be available there



Welcome aboard

Welcome to your Cloud Eucia account, you can add, protect, and share your data.

Your Login is: MARY

Set your password

Install Client



Maryline Chifflet-Saby shared WORKING GROUPS with you

Open WORKING GROUPS

**Thank you very much
for your active participation**

