press release no. 4

ECOMONDO 2026: THE GREEN, BLUE AND CIRCULAR ECONOMY NUMBERS

- **Italy ranks among the European leaders in circular resource use: in 2024, the circular material utilisation rate (CMU) reached 21.6% compared with an EU average of 12.2%**

- **Textiles still have significant potential for recovery: in 2024, approximately 1.4 million tonnes of textile products were released onto the market in Italy**

- **The challenge of water resilience is increasing: the availability of fresh water in Italy has fallen by 18–20% over the last thirty years. Around 30% of the EU's territory is affected by seasonal water scarcity every year**

- **Circular economy and jobs: between 2025 and 2029, the Italian labour market will require a total of between 3.3 and 3.7 million workers. In Europe, the circular economy could generate 2.5 million new jobs by 2030**

Rimini, 28th October 2026 - The eighth edition of the **Report on the Circular Economy in Italy**, commissioned by the Circular Economy Network (CEN) in collaboration with the Foundation for Sustainable Development and ENEA, and presented last May, confirmed **Italy's position as one of Europe's leading countries in terms of circularity**.

The analysis, based on five dimensions of the European circular economy monitoring framework – production and consumption, waste management, secondary raw materials, competitiveness and innovation, and ecological sustainability and resilience – puts **Italy in second place overall** with **65 points**, just behind the Netherlands (with 69.3). This result is especially supported by performance in waste management and production and consumption, where high resource productivity is the key factor. The competitiveness and innovation category, where investment linked to circular economy activities is still limited, has room for improvement. Next come Belgium (59.6 points) and Germany (58.8), while France and Spain occupy sixth and tenth place respectively with 57.9 and 54 points.

Efficient use of materials is one of the Italian system's key strengths. In 2024, **Italy generated 4.7 euros of GDP for every kilogramme of resources consumed**, 32% more than in 2019 and significantly higher than the EU average of 3 euros/kg. Among the other major European economies, Spain and Germany stood at 3.9 euros/kg and France at 3.6 euros/kg. This performance is, however, offset by a heavy reliance on foreign sources: **in 2024, 46.6% of the materials used by the Italian economy came from imports**, more than double the European average of 22.4% and a higher proportion than that of Spain (39.8%), Germany (39.5%) and France (30.8%).

ITALY AMONG THE EUROPEAN LEADERS IN THE CIRCULAR USE OF MATERIALS

A key indicator for the circular economy is the **circular material utilisation (CMU)** rate which measures the ratio between the use of secondary raw materials generated through recycling and total material consumption. In 2024, **Italy reached 21.6%**, an increase of 2.9 percentage points compared with 2019 and a figure well above the EU average of **12.2%**. Of the four main European economies analysed, Italy retains the top position ahead of France (17.8%), Germany (14.8%) and Spain (7.4%).

Italy also leads the way in the **proportion of total recycled waste managed**. According to Eurostat data for 2022, out of **160 million tonnes of municipal and special waste treated, Italy sent 137 million tonnes for recycling, the equivalent of 85.6%**, more than double the European average of 41.2%. A more than 30 percentage point gap compared with other major EU economies: Spain 54.7%, France 52.3% and Germany 44.4%.

According to CONAI, in 2025, Italy achieved a **recycling rate of 92.6% for paper and cardboard** (4,612,000 tonnes), **82.2% for steel** (over 442,000 tonnes), **more than 82% for glass** (2,155,000 tonnes), **69.5% for aluminium** (56,000 tonnes) and **69.7% for wood** (2,493,000 tonnes).

CRITICAL RAW MATERIALS AND WEEE: RECOVERY AS A STRATEGIC LEVER

Access to **critical and strategic raw materials** is increasingly central to industrial competitiveness and Europe's ecological and digital transition. Materials such as lithium, cobalt, graphite and rare earths are essential for numerous strategic technologies, while copper and nickel, although not classified as critical, are also seen as strategic raw materials. The **Critical Raw Materials Act** aims to strengthen Europe's self-sufficiency by setting benchmarks for 2030: **10% of demand to be met through extraction within the EU, 40% through processing, and 25% through recycled materials.**

In this context, **WEEE (Waste Electrical and Electronic Equipment)** is a significant source for the recovery of metals and critical raw materials. In Italy, however, the sector's potential is still limited by collection rates. In 2023, this rate stood at **30% of the average volume released onto the market over the previous three-year period** compared with an EU average of **37.5%** and a European target of **65%** set for 2019. Once collected, however, WEEE performs very well: in the same year, **84.2% of separately collected waste was sent for recycling or preparation for reuse**, a figure that puts Italy in second place among the four major European economies, behind Germany (84.5%) and ahead of France (79.1%) and Spain (70.6%).

The latest figures from the **WEEE Coordination Centre** point to further progress. In the first six months of 2026, **over 177,500 tonnes of WEEE** were collected in Italy, **3.3% more than in the same period of 2025**. The growth is driven primarily by the category that comprises washing machines, dishwashers and ovens with **nearly 69,000 tonnes collected and an annual increase of 10.5%**.

TEXTILES: CIRCULARITY'S NEW FRONTIER

Textile waste management is one of the emerging challenges of the transition to a circular economy. In the European Union in 2022, as shown in the 2025 Recycling in Italy Report, compiled by the Foundation for Sustainable Development in collaboration with CONAI and with the support of ISPRA, **6.94 million tonnes of textile waste** were generated, **equivalent to 16 kg per inhabitant**. In the same year, the average rate of separate collection was still below **15%** with around **85% of household textile waste ending up in the unsorted waste flow** with no possibility of being recovered for reuse or recycling.

However, there is still significant potential for recycling in Italy. In 2024, approximately **1.4 million tonnes of textile products** were put on the market, 63.7% of which was clothing. In terms of end-of-life, in 2023 separate collection reached **171,600 tonnes, around 7% more than in 2022**, but the service was operational in only 81% of Italian municipalities and **over one million tonnes of municipal textile waste continued to end up in unsorted waste**. The recovery system still has limitations in terms of plant capacity and sorting, while a significant proportion of recycled material is used for applications other than textiles through downcycling processes.

The European regulatory framework now aims to speed up the supply chain's transformation. The revised Waste Framework Directive introduces a harmonised **Extended Producer Responsibility (EPR)** scheme for textiles and footwear that requires producers to finance and organise end-of-life product collection, sorting, preparation for reuse and recycling. This is accompanied by the Ecodesign for Sustainable Product Regulation **(ESPR)**, which introduces requirements relating to durability, reparability, recyclability and the use of recycled materials, and foresees a Digital Product Passport. On **19th July 2026**, a ban on the destruction of specific categories of unsold textiles and clothing also come into force - a particularly significant measure given that, in Europe, it is estimated that between **4% and 9% of textiles released onto the market, amounting to 264,000–594,000 tonnes each year**, are destroyed before use.

PACKAGING: THE CHALLENGES OF THE PPWR REGULATION

Over three-quarters of the packaging waste generated in Italy is sent for recycling. In 2023, the recycling rate reached **75.6%,** more than 7 percentage points above the EU average of 67.5% and the highest figure among the four major European economies. Data from CONAI show further progress in 2024 with the overall rate rising to **76.7%** and in 2025, when Italy recycled **10,970,000 tonnes of packaging, equivalent to 77.3% of the 14,200,000 tonnes released onto the market**.

A key challenge, however, is still **plastic**, which in 2023 accounted for **18% of packaging waste generated in Italy, the equivalent of approximately 2.3 million tonnes**, with per capita generation standing at 38.8 kg. In terms of recycling, however, Italy has seen a gradual improvement from 45% in 2019 to 49% in 2023, rising to **51.1% in 2024** and **50.5% in 2025**, according to the latest figures released by CONAI. In other words, 1,161,000 tonnes of conventional plastic and over 44,000 tonnes of compostable bioplastic.

2026 also marks an important milestone in terms of regulation with the **Packaging and Packaging Waste Regulation (PPWR)**. Regulation (EU) 2025/40, which came into force in February 2025, introduces stricter requirements regarding the **design and recyclability of packaging, waste prevention, reuse and recycled content** with a particular focus on plastics, as well as new provisions for labelling and collection. As of **12th August 2026, many of its provisions have been directly applicable in all Member States**, ushering in a new phase for European packaging circularity.

WATER AND SOIL: NATURAL RESOURCES UNDER PRESSURE

Water management is becoming an increasingly important priority for European resilience. Every year, around **30% of the EU's territory is affected by seasonal water scarcity** with this figure rising to as much as **70% of the population in southern Europe during the summer months**. In Italy, freshwater availability has fallen by **18–20% over the last thirty years** and stood at around **112.4 billion cubic metres** in 2023. The new European **Water Resilience Strategy** therefore aims to improve water efficiency by at least **10% by 2030** by promoting the reuse of treated wastewater, the recovery of materials and energy and network digitalisation.

At the same time, pressure on **soil** is still a critical issue. In 2024, **83.7 km² of Italian land was converted into new artificial surfaces**, 15.6% more than in 2023, while net land take reached **78.5 km², the highest figure in the last twelve years**. Buildings, infrastructure and other artificial coverings account for a total of more than **21,500 km², equivalent to 7.1% of the national territory** compared with a European average of 4.4%. Added to this are the costs of land take resulting from the loss of ecosystem services, estimated to be between 8.66 and 10.59 billion euros annually due to land take that occurred between 2006 and 2024.

THE GREEN ECONOMY: THE POTENTIAL FOR EMPLOYMENT

The ecological transition is having an increasingly wide-ranging impact on the demand for skills in Italian businesses. The **Green Skills 2025 report compiled by Unioncamere** indicates that, in the period analysed, an attitude towards energy saving is required for **over 4.6 million planned new hires, accounting for 79.8% of the total**, whilst specific skills in the management of green products and technologies are required for **over 3.4 million roles, representing 58.8% of planned new hires**.

The outlook confirms the central role of skills in the labour market's transformation. According to the publication entitled "Medium-term forecasts of employment and professional needs in Italy (2025–2029)", **the Italian labour market will have a total demand for between 3.3 and 3.7 million workers** with particularly high demand for highly specialised and technical-professional roles. In this context, training and upskilling are key drivers in supporting companies' green and digital transition.

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ABOUT ECOMONDO 2026

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This press release contains forecast elements and estimates that reflect the management´s current opinions (´forward-looking statements´), particularly regarding future management performance, realization of investments, cash flow trends and the evolution of the financial structure. For their very nature, forward-looking statements have a component of risk and uncertainty, as they depend on the occurrence of future events. The effective results may differ (even significantly) from those announced, due to numerous factors, including, only by way of example: food service market and tourist flow trends in Italy, gold and jewellery market trends, green economy market trends; the evolution of raw material prices; general macroeconomic conditions; geopolitical factors and evolutions in the legislative framework. Moreover, the information contained in this release, does not claim to be complete, and has not been verified by independent third parties. Forecasts, estimates and objectives contained herein are based on the information available to the Company as at the date of this release.