

Challenges and opportunities for scaling copper circularity in European grids

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Protect the **market**
and the industry
with science and
evidence

01

PROMOTE

Promote **copper** as
the element of choice
and our **members** as
responsible
producers

02

PROTECT

Defend and sustain
copper **demand** in
the top markets

03

DEFEND

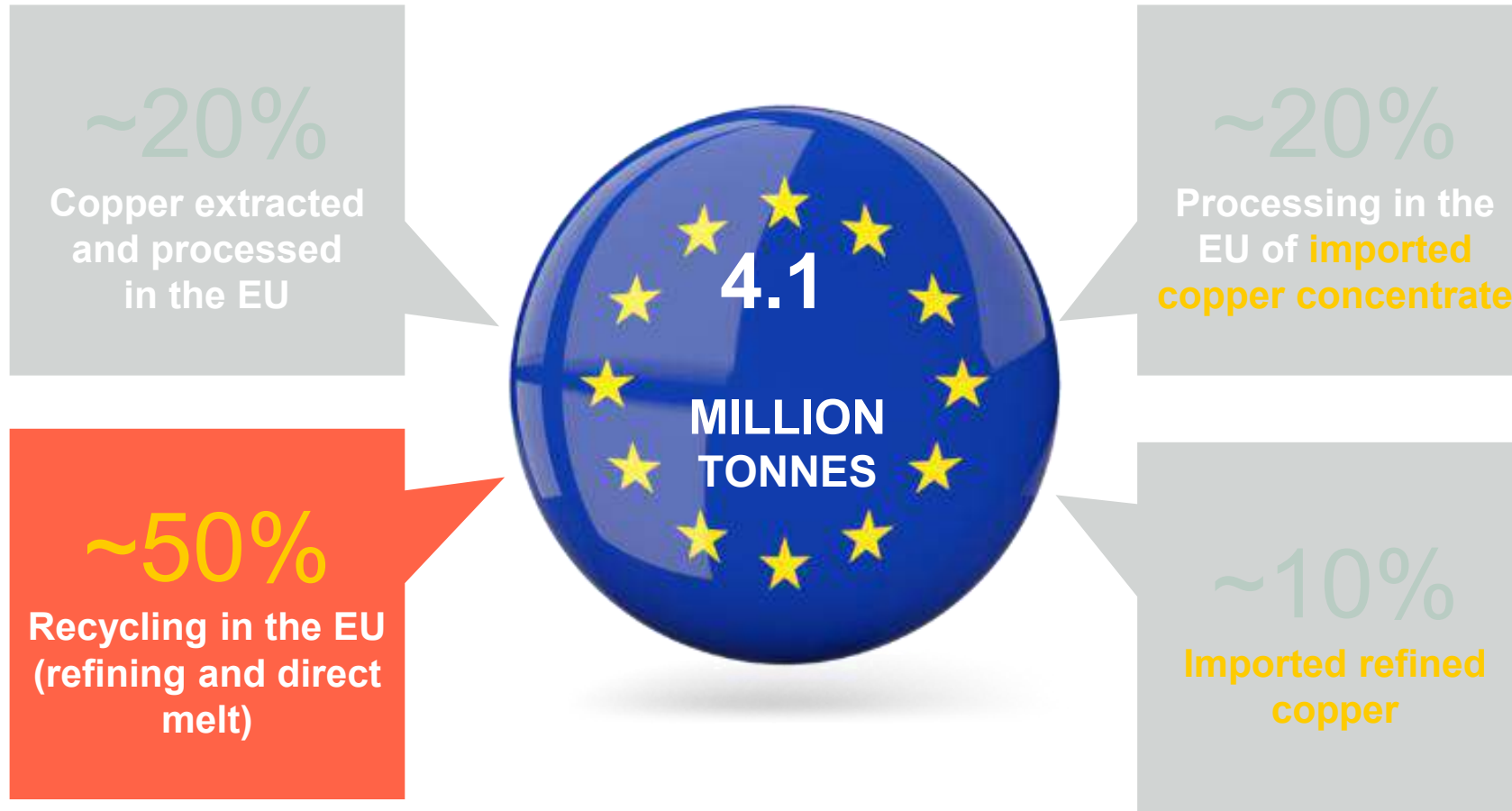


A strong EU supply chain

Total EU demand across all semi-fabricated copper products



50% of EU copper demand is met by recycling capacity



Figures of 2022, Sources: ICSG, IWCC, ICA Stocks & flows model, and own calculations, rounded numbers considering net imports or exports
Balance at copper semis level

Recycling help meet the growing demand, but not alone

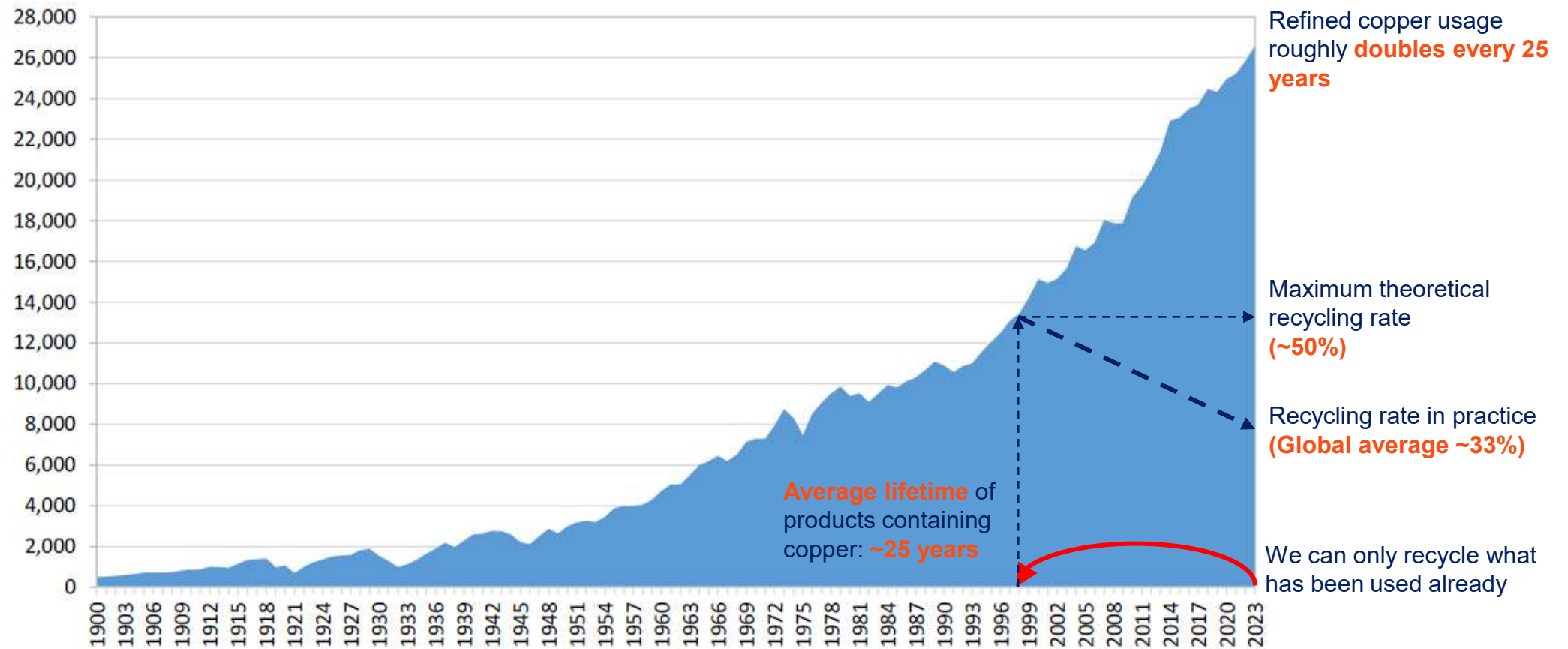
- ✓ Copper has one of the **highest recycling rates** of any engineering metal
- ✓ Close to **50%** of EU copper supply comes from recycled resources
- ⚠ Recycling alone will not meet the projected demand: we can only recycle what has been used already

Copper recycling rate: practical limits

WORLD REFINED COPPER USAGE, 1900-2023

Thousand metric tonnes of copper

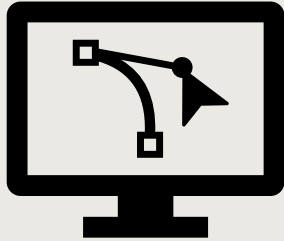
Source: ICSG



Since 1900, apparent usage for refined copper has increased from less than 500 thousand tonnes to 26.5 million metric tonnes in 2023 as usage over the period grew by a compound annual growth rate of 3.3% per year.

Source: The World Copper Factbook 2024 <https://icsg.org/copper-factbook/>

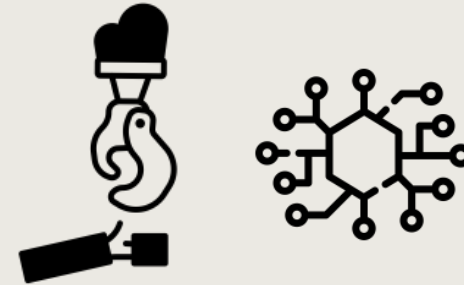
Options for optimizing the collection rate



Design-for-sustainability



Incentives to improve
collection rates



Progress in sorting technologies
Trained AI systems
Innovative shredding

Copper circularity key components



- ✓ Copper is a strategic pillar of the green transition and an essential raw material for grids (cables, transformers)
- ✓ Its circularity depends on improved collection (rather than restrictive recycled content targets/mandates)
- ✓ Copper recycling value chain is already highly efficient: the manufacturing industry select the optimal material blend (primary and secondary) and melting process for each application
- ⚠ Increasing recycled content faces strict limits due to global scrap availability and technological / manufacturing reasons
- ⚠ High-recycled-content solutions exist but remain niche that cannot be replicated at a large industrial scale

Thank you!

Resilient & Optimised Grids

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