

Global Cement and Concrete Association

GCCA Policy Document on Co-processing

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Global Cement and Concrete
Association (GCCA) is registered
in England & Wales, Company
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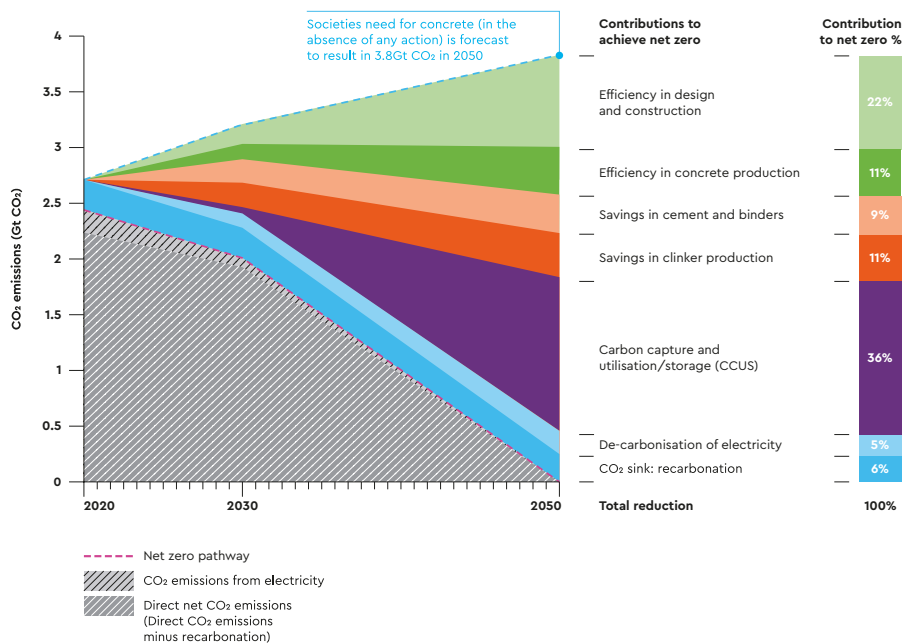
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The Net Zero Pathway from the 'GCCA 2050 Cement and Concrete Industry Roadmap for Net Zero Concrete'^A. An important decarbonisation lever is savings in clinker production. This policy document addresses how to maximise the potential CO₂ savings from this lever.

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1. Position Statement

Co-processing of waste in cement kilns is an established, environmentally sound, and highly regulated waste management technology. It is a valuable option for a wide range of societal wastes. In contrast to energy recovery, co-processing does not only recover the energy content of the waste, but also recycles its mineral content into high value cement and concrete products. Co-processing results in the reduction of fossil fuels and primary materials consumption as well as reduction in waste disposal.

The Global Cement and Concrete Association (GCCA) and its members recognise their responsibility to nature and society. We are committed to respecting and protecting nature on a global, regional, and local level, wherever we conduct business. Hence, we drive the sustainable development of the cement and concrete sectors and their value chains. GCCA members must comply with the GCCA Sustainability Charter and Guidelines that cover topics such as climate change, environment & nature, circular economy & co-processing. GCCA also provides its members with Best Available Techniques (BAT) and Best Environmental Practices (BEP) through issuing guidance documents. GCCA and its member companies follow the common understanding that avoiding and reducing waste is the best way of dealing with waste hierarchy.

Co-processing describes the process in which wastes are used to replace fossil fuels and primary resources in clinker production, where clinker is a key ingredient of cement. Various types of wastes are suitable for co-processing, for example, plastics, paper, waste chemicals and tyres; some of which contain biogenic fraction.¹

Where waste and by-products cannot be managed technically or economically by prevention, reduction, reuse or recycling, the cement manufacturing process provides a more ecologically sustainable solution, compared to waste-to-energy, incineration, or landfill, thanks to the full energy recovery and material recycling. Co-processing plays a critical role in preventing plastic pollution entering the environment as co-processing diverts plastic waste that cannot be recycled in another way from unsustainable options like landfill, or unsafe practices such as open burning.

2. The benefits of Co-processing

Co-processing is a waste management option that is used globally, given its benefits in managing wastes. For example, in Europe the cement sector is substituting on average 53% of its fossil fuel with waste derived fuels.² Several cement plants already operate at about 100% substitution of fossil fuels. Globally, the figure is estimated to be around 6% showing the further potential of managing wastes in cement kilns.

Co-processing is a highly regulated process & operated in line with Best Available Technology/ Best Environmental Practices. It is a recognised environmentally sound waste-treatment option. Long retention times, high temperatures and strict control of chlorine levels mean cements kilns have lower emissions to air than waste incineration plants. Waste materials undergo a rigorous acceptance and inspection procedure before being used in cement kilns. Application of Best Available Techniques (BAT) and Best Environmental Practices (BEP) ensure a high level of protection of human health and the environment.^{4, 5, 6, 7}. For example, the European Union regulates air emissions from industry, including cement manufacture.^{5,8} Installations operate in accordance with a corresponding permit. Air emissions are measured according to specified provisions to ensure compliance with the limit values, and these are published on a regular basis. GCCA has Guidelines for the monitoring and reporting of emissions.

The UNEP Basel Convention Technical Guidelines for waste co-processing provide instructions for the use of waste as alternative fuels in cement kilns. These address concerns of potential toxic emissions such as furans and dioxins when the conditions in the kilns are not properly controlled. Guidance must be followed, and close monitoring and quality control are essential to avoid negative impacts. The local regulations must provide strict control points for the cement kiln operation.

Co-processing reduces global CO₂ emissions and global fossil fuel consumption, as it reduces the amount of waste that is incinerated or sent to landfill. As wastes are shifted from incinerators to co-processing in cement kilns, the amount of CO₂ emissions from waste incinerators are reduced. Additionally, cement kilns reduce their demand for fossil fuels although the consumption of waste derived fuel is often associated with a small but appreciable increase in kiln fuel consumption overall. Due to the high temperatures in the clinker kiln, the cement sector can substitute fossil fuels with fuels derived from waste. Using waste as fuel in the cement sector, therefore helps to increase the energy security of a country, as there is less competition for fossil fuels.

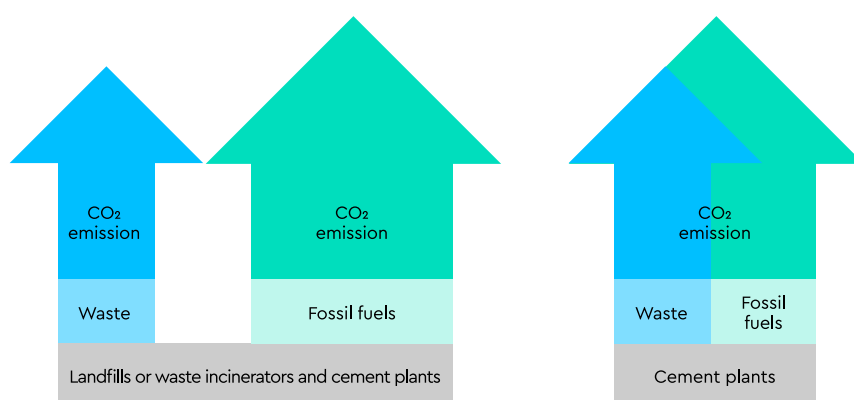


Figure 2 Utilisation of waste fuels in cement plants results – according to the Greenhouse Gas Protocol – in CO₂ and GHG emission reduction at landfills and incineration plants. (Source: GCCA 2050 Roadmap, p. 26)

Co-processing helps reduce open waste burning and landfill. In countries which lack a sound waste management system, co-processing offers the opportunity to divert waste away from open burning and landfill to existing cement kilns. This reduces the demand for investment in other waste management options and is a solution already available.¹¹ However, some pre-conditions need to be in place. Countries must develop waste collection, waste separation and regulation on co-processing; cement companies have to build up know-how and skills on co-processing and they also need to make the necessary investments in equipment. Most countries have cement kiln production capacities and the key advantages of using them are the reduced investment requirements and the capacity to deal with plastic and other wastes on an industrial scale from plastic hotspots or mining efforts from landfill and dumpsites⁹. With this approach, the energy content in non-recyclable plastic waste can be harnessed to produce clinker, while reducing the reliance on fossil fuels.⁶

A 2023 UNEP report¹⁰ looked into the causes of plastic pollution and proposed a system change scenario for the future. The scenario suggests that intermediate solutions will be needed to prevent plastics that cannot be eliminated or recycled from becoming pollution. The UNEP report urges governments to assess whether cement kilns may be available for the safe disposal of non-circular plastic and for avoiding plastic pollution.

Co-processing is recognised as environmentally sound management even of hazardous waste. The Basel Convention, which is led by the United Nations Environmental Programme (UNEP), published technical guidelines¹¹ where the role of co-processing is recognised as an environmentally sound management process for hazardous wastes:

*"Co-processing of wastes in properly controlled cement kilns provides energy and materials recovery while cement is being produced, offering an environmentally sound recovery option for many waste materials. As countries strive for greater self-sufficiency in hazardous waste management, particularly in developing countries that may have little or no waste management infrastructure, properly controlled co-processing can provide a practical, cost-effective, and environmentally preferred option to landfill and incineration. In general, co-processing of waste in resource-intensive processes can be an important element in a more sustainable system of managing raw materials and energy."*¹²

Furthermore, for some chemical substances, for example, wastes containing Persistent-Organic-Pollutants (POPs), the Basel Convention Technical Guidelines, acknowledge that co-processing in cement kilns provide a technology to safely destroy POPs, while waste incinerators and landfill are not seen as environmentally sound waste management options for these substances.¹¹

Co-processing reduces the need for public spending on waste incinerators and landfill.

By using waste derived fuels, the cement sector can use waste that would otherwise be incinerated or sent to landfill. Thus, public investments in incineration plants and landfill are reduced. Hence, co-processing can play and indeed, already plays a key role in waste management in local communities and municipalities in most countries. Especially where proper waste management is low.¹¹

The cement sector is capable of using pre-processed wastes in its production processes and it does undertake the necessary investments. While using existing cement kilns requires smaller investments than building new waste management options, using pre-processed wastes in cement kilns does not come without costs. Waste needs to be collected from landfill, dump sites and other locations. Alternatively, waste separation mechanisms need to be rolled out and applied. Then the waste needs to be pre-processed into suitable alternative fuels. Investment is also required to address quality assurance through laboratory testing facilities. This ties in with the health and safety aspects that should be considered to mitigate risks in all steps of the process.

Co-processing reduces the amount of methane emissions from landfilling wastes.¹²

Biogenic waste if sent to landfill or disposed of in an uncontrolled manner can lead to emissions of methane, a gas with significantly greater global warming potential than carbon dioxide. But these methane emissions can be avoided if this waste is redirected to cement kilns.

While incineration generates ashes, co-processing incorporates the mineral content into the product. In some circumstances, particularly at high waste fuel usage rates, the amount of kiln dust might increase and is typically incorporated into the final product.

Co-processing does not impact product quality. Co-processing may change the metal concentrations in cement products which are in turn integrated in the concrete or mortar matrix. Risk of release from the concrete matrix has been the subject of numerous research studies over the last 20 years and there is substantial evidence that the use of selected waste as alternative fuel has no negative impact on the

environmental quality of the product. The recyclability of concrete and mortar also remains completely unaffected.

Co-processing reduces the need for primary raw materials. As the mineral content of the waste substitutes raw materials into the clinker and eventually into concrete, co-processing also reduces the use of primary raw materials. About 5% of the raw materials needed in the production of the cement clinker in Europe consists of recycled material and ashes from alternative fuels.²

Co-processing is both materials recycling and energy recovery. In addition to the energy recovery, the mineral fraction from the waste is incorporated in the product, which is clinker, the key ingredient of cement. Co-processing is thus the combination of simultaneous material recycling and energy recovery from pre-treated waste in a thermal process, which replaces natural mineral resources and fossil fuels such as coal and petroleum products.

An ISO standard¹³ expected to be published in July 2024, defines a global methodology for the calculation of the part of solid recovered fuels, which is recycled when used in cement kilns. The Spanish Cement and Environment Labour Foundation, CEMA, has conducted a study¹⁴ to measure the recycling index (R-index) of 63 samples of waste used in the cement industry. The R-index was found to be in the range of up to 26%, depending on the waste types.¹⁵

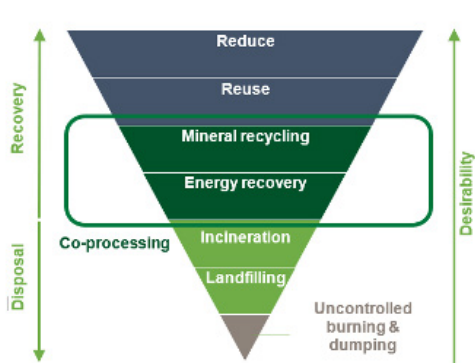


Figure 1: Co-processing in the waste management hierarchy ¹⁶

3. Policy Context

Co-processing is included as a standalone operation in the recommendations of the Expert Working Group on the review of the Annex IV of the Basel Convention, which outlines in its Technical Guidelines, how co-processing is an environmentally sound waste management option for even hazardous wastes.

An increase in co-processing can be enabled by legislative and regulatory measures, that recognise this form of material recycling and energy recovery and its contribution towards achieving ambitious recycling targets. More specifically, supply chain logistics and infrastructure, permit-issuing, and waste policies like landfill taxes, that aim to reduce or even eliminate waste to landfill, will be required to support the cement industry in the increasing use of waste.

4. Policy Recommendations

Increasing co-processing in the cement sector will require the collaboration of governments and policy makers at municipal, regional, national, and global level to implement enabling policies in several areas, as follows.

1. Facilitate increased use of waste as alternative fuels and alternative raw materials in clinker (cement) production through:
 - a. implementing policies to enable access to, and use of, suitable waste and secondary material streams, including biowaste, through policy measures that:
 - i. reduce landfilling of waste that can be co-processed,
 - ii. encourage segregation of waste streams to enhance resource flows,
 - iii. enable environmental permit-issuing at the cement works.
 - b. Providing a level playing field for the access and use of biomass across all sectors of the economy.
 - c. Formal recognition of the simultaneous energy recovery and mineral recycling characteristics of 'co-processing' in waste policy frameworks, including, at international level, the addition of a dedicated code (R15) for co-processing under Annex IV of the Basel Convention.
 - d. Monitoring and accounting of the share of materials which are effectively recycled through co-processing in a country's national recycling targets.

5. GCCA Commitments

The GCCA and its members recognise the need for the industry to implement, support and advocate for increased co-processing in our industry. The GCCA and its members commit to:

1. Increase globally the use of waste in cement production, thereby reducing waste incineration, landfill, emissions from landfill, open burning, and plastic pollution.
2. Focus on materials which were derived from waste, and which cannot be recycled in another way.
3. Comply with the GCCA guidelines for co-processing fuels and raw materials and guidelines for the monitoring and reporting of air emissions.
4. Collaborate to promote good co-processing practices, capacity building, standards and enabling policies.
5. Engaging with national and local authorities as well as value chain partners (e.g., equipment suppliers) as a reliable partner on waste management to implement and ensure waste management in-line with local requirements.
6. Engage transparently with communities on waste consumption in cement plants.
7. Continuously improve our production processes to reduce energy consumption and CO₂ emissions.

6. References

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