The Circular Economy Ecosystem in Kosovo: A Comprehensive Analysis of Sectoral Dynamics, Industrial Capacities, and Institutional Frameworks

1. Strategic Overview: The Macro-Environmental Context of Waste Management in Kosovo

The trajectory of the circular economy in Kosovo represents a complex interplay between post-conflict reconstruction, rapid urbanization, and the burgeoning pressures of European integration. Unlike mature Western European markets where circularity has evolved through decades of gradual policy layering, Kosovo is navigating a compressed transition. The nation is attempting to leapfrog from a linear "take-make-dispose" model directly into a resource-recovery paradigm, driven less by domestic regulatory enforcement and more by the powerful economic incentives of the global commodities market. This report offers an exhaustive examination of this landscape, dissecting the roles of industrial giants, niche innovators, and the institutional architecture that binds them.

1.1 The Policy Architecture and Regulatory Environment

The legislative backbone of Kosovo's waste management sector is grounded in the Law on Waste, which mandates the hierarchy of waste management: prevention, preparation for reuse, recycling, recovery, and disposal.[1] However, the operational reality is governed by a patchwork of implementation strategies that have historically struggled to bridge the gap between legislative intent and municipal capability. The "Kosovo Integrated Waste Management Strategy (2021–2030)" represents the current strategic doctrine, aiming to align Kosovo with the circular economy principles of the European Union.[1] This strategy is a

successor to the 2013–2022 framework, acknowledging previous shortcomings where targets for reducing biodegradable waste and increasing recycling rates were frequently missed due to a lack of infrastructure and enforcement mechanisms.[2]

The Ministry of Environment, Spatial Planning, and Infrastructure (MMPHI) serves as the primary regulatory body, while the Ministry of Economy oversees the publicly owned Kosovo Landfill Management Company (KLMC).[1] The KLMC's role is pivotal yet problematic; it manages the physical disposal sites that act as the terminus for the linear economy, often competing for material volume with the very recycling initiatives the government seeks to promote. The data indicates that while waste collection coverage is high in urban areas—reaching between 90% and 95% of the population—the service quality is characterized as "very low standard," primarily due to the absence of source separation.[1] This creates a highly contaminated feedstock for recyclers, forcing private companies to invest heavily in washing and sorting technologies or to bypass municipal streams entirely in favor of commercial waste.

Recent analysis of the recycling value chain suggests that Kosovo generates approximately 271.67 kg of waste per capita annually, with a total mixed municipal waste collection of roughly 430,145 tons/year.[3] Despite this volume, the percentage of households with access to waste separation infrastructure remains negligible at around 5%.[3] This statistic is the fundamental bottleneck of the entire sector: the "first mile" of the reverse logistics chain is broken, necessitating a reliance on informal collectors and private industrial contracts to secure recyclable materials.

1.2 Economic Drivers: The Primacy of Export Markets

The Kosovan recycling sector is, at its core, an export-oriented industry. The domestic manufacturing base is historically too small to absorb the total volume of recovered secondary raw materials, particularly in metals. Consequently, companies like **Rec-Kos** and **Naimi Metal Recycling** have evolved not merely as waste managers but as international commodity traders. They function as aggregation nodes, collecting dispersed scrap materials, processing them to meet international purity standards (often exceeding 99%), and exporting them to foundries and steelworks in Turkey, Italy, and Northern Europe.[4]

This export orientation introduces a rigorous quality discipline. International buyers of scrap metal and plastic regranulate are intolerant of contamination. For a Kosovan firm to succeed, it cannot simply bale mixed waste; it must process, clean, and sort materials to a degree of homogeneity that rivals European competitors. For instance, the export of recyclables was valued at approximately 52.1 million Euro in recent years, highlighting the sector's contribution to the national trade balance.[3] The ferrous metals category dominates this export profile,

constituting 69% of the recycled waste composition, followed by paper/cardboard (14%) and plastics (13%).[3]

However, this model also exposes the sector to global volatility. Fluctuations in the London Metal Exchange (LME) prices or shifts in Chinese import policies for plastics have immediate ripple effects on the profitability of collectors in Fushë Kosovë or Podujevë. Furthermore, the reliance on exports represents a leakage of economic value; the value-add of smelting or remanufacturing occurs outside Kosovo's borders. The emergence of companies like **Plastika**, which manufactures finished foils from recycled granules [6], signals a critical shift toward retaining this value domestically.

1.3 The Role of International Development and FDI

The rapid modernization of Kosovo's recycling infrastructure is inextricably linked to Foreign Direct Investment (FDI) and international development aid. The capital intensity of modern recycling machinery—requiring millions of Euros for optical sorters, washing lines, and extruders—often exceeds the lending capacity of local commercial banks.

- **European Bank for Reconstruction and Development (EBRD) and EU:** These entities have provided targeted financing to companies like Plastika to upgrade production lines and improve competitiveness.[6]
- **Joint Ventures:** The **REKS LLC** project in Kaçanik is a paradigmatic case of FDI, bringing together Dutch expertise (**KRAS Recycling**, **KIVO**) with local entrepreneurship. This partnership provided not just capital but vital technology transfer and market access.[7]
- **Donor Programs:** Initiatives such as the "Support Waste Management in Kosovo" (WMK) project [9] and GIZ's "Sustainable Municipal Services" [10] function as systemic enablers, working on the "soft infrastructure" of municipal planning, legal frameworks, and capacity building.

2. The Ferrous and Non-Ferrous Metal Industry: Industrial Backbones

The metal recycling sector is the most mature, capitalized, and logistically complex vertical within Kosovo's circular economy. It operates on a high-volume, low-margin basis where efficiency in logistics and processing is the primary determinant of survival.

2.1 Market Leaders and Operational Capacities

Rec-Kos LLC, headquartered in Fushë Kosovë, stands as the titan of this sector. Its operations are comprehensive, spanning the collection, processing, sorting, and trading of diverse metal streams including iron, stainless steel, aluminum, copper, lead, and zinc.[4] The company's infrastructure is indicative of heavy industry: a facility covering over 6 hectares with 3,000 square meters of covered processing space, equipped with hydraulic presses, excavators, and specialized shearing machines.[11]

Rec-Kos's operational model is vertically integrated regarding waste types. Beyond standard scrap, they have diversified into hazardous waste management, handling waste oils, rubber, and Waste Electrical and Electronic Equipment (WEEE).[4] This diversification allows them to offer "total waste management" solutions to industrial clients who need to decommission factories or dispose of complex assets. Their claim of achieving product purity of up to 99.9% through a combination of mechanical processing and manual cleaning [5] is a direct response to the stringent requirements of their export partners in the EU and Turkey. The establishment of a subsidiary, **Reckoss-Trans LTD** in Skopje, North Macedonia [11], further illustrates their strategy of regional logistics integration, utilizing neighboring infrastructure to access broader markets.

Naimi Metal Recycling SH.P.K., based in Podujevë, represents a critical regional node. While perhaps smaller in total footprint than Rec-Kos, firms like Naimi Metal are essential for the densification of the collection network.[12] They act as intermediaries that aggregate material from smaller collectors and individual scavengers in the northeastern region of Kosovo, feeding the larger export channels. The presence of multiple players in this space, including **Thes-Ari Recycling Industrie** in Viti [14], ensures a competitive market for scrap, which keeps prices fair for collectors and encourages higher recovery rates.

2.2 The Specialized Niche: Refractory and Industrial Minerals

A unique actor in this landscape is **Horn-Co**, located in Deqan. Unlike general scrap dealers, Horn-Co operates in the specialized niche of minerals recovery and refractory products. Associated with the German **Horn & Co. Group**, this entity positions itself as part of "Europe's most sustainable producer of refractory products".[16] Their focus is on the closed-loop recycling of industrial minerals, a highly technical field that supports heavy

industries like steelmaking and glass manufacturing.

This operation highlights a level of sophistication often overlooked in general assessments of Kosovo's waste sector. It implies the existence of industrial processes in the region that require high-grade refractory materials and generating specific industrial waste streams that Horn-Co is equipped to recover. This connection to a major German industrial group provides Horn-Co with access to proprietary analysis and processing technologies (branding under "Industrial Lab" or "Mireco") that are likely unavailable to purely local competitors.[17]

2.3 Electronic Waste (WEEE): The Urban Mine

The management of Waste Electrical and Electronic Equipment (WEEE) is a growing sub-sector driven by the digitization of Kosovan society. **Vishi Group L.L.C.** and **European Metal Recycling** (based in Obiliq) are identified as key players in this specific domain.[14]

Processing WEEE differs fundamentally from general scrap. It requires the careful disassembly of devices to separate hazardous components (batteries, mercury switches, cathode ray tubes) from valuable printed circuit boards (PCBs) containing gold, silver, and palladium. **Rec-Kos** also lists electronic scrap as a primary material [4], suggesting they have the permits and safety protocols necessary to handle these hazardous workflows. The environmental stakes in this sector are high; improper handling of WEEE can lead to severe heavy metal contamination of soil and water. The presence of specialized, licensed firms indicates a move away from informal burning of cables toward formal recycling processes.

3. The Plastic Recycling Renaissance: From Waste to Product

While the metal sector is established, the plastic sector is undergoing a renaissance characterized by technological innovation and the development of domestic closed-loop systems. This sector is pivoting from simple collection and baling to advanced washing, regranulation, and remanufacturing.

3.1 The Joint Venture Model: REKS LLC

REKS LLC in Kaçanik is arguably the most technologically advanced plastic recycling facility in the country. Its existence is the result of a strategic joint venture between Kosovan entrepreneurs and two Dutch heavyweights: **KRAS Recycling** and **KIVO Flexible Plastics**.[7] This structure addresses the two main failure points of recycling startups: lack of technical know-how and lack of market demand.

- **Technological Edge:** REKS operates a state-of-the-art plant designed to wash and regenerate LDPE and LLDPE films.[8] Plastic film is notoriously difficult to recycle due to high surface area and contamination (e.g., agricultural soil, food residue). REKS's facility utilizes advanced washing lines that can process these "dirty" streams into high-quality PCR (Post-Consumer Recycled) granulates.[7]
- **Market Integration:** Crucially, the granulate produced by REKS does not just sit in a warehouse. It is utilized by KIVO (which also has a production site in Kosovo) to manufacture new plastic bags and packaging.[7] This creates a tangible "closed loop" within Kosovo's borders—waste film is collected, recycled, and turned back into film locally.
- **Capacity:** With a processing capacity scaling from 10,000 to 18,000 tons per year [7], REKS single-handedly diverts a significant percentage of Kosovo's commercial plastic waste from landfills.

3.2 Vertical Integration: Plastika

Plastika, operating out of Drenas and Fushë Kosovë, demonstrates the power of vertical integration. Founded as a trading company, it has evolved into a manufacturer that employs over 90 people.[6] Plastika collects waste, recycles it, and then uses its own recycled material to produce agricultural and construction foils.[18]

This business model creates resilience. By manufacturing finished goods (brands such as *Dimpled Membrane* and *Stretch Hood*), Plastika captures the manufacturing margin in addition to the recycling margin.[18] They are less vulnerable to the price fluctuations of raw plastic granulate because they are selling a value-added product. Their ability to export 60% of their turnover [6] serves as proof that Kosovan recycled products can meet international quality standards.

However, Plastika's growth has not been without obstacles. The company explicitly cites infrastructural challenges, particularly power outages, as a major operational risk.[6] In the plastic extrusion process, a power cut can cause molten plastic to solidify inside the machines, leading to costly downtime and equipment damage. This highlights how broader

infrastructural deficits in Kosovo (energy security) directly impede the transition to a circular economy.

3.3 Industrial Packaging: Powerpack LLC (Scampa)

Another significant player is **Powerpack LLC**, a joint venture between **Scampa** (Kosovo) and **Powerpack NV** (Belgium).[19] Located in the Drenas Industrial Park, this company specializes in producing PE waste bags for the European market. While primarily a producer, their integration into the recycling ecosystem is vital as they are a prime consumer of recycled polyethylene. Their export-oriented model (100% of production to the EU) [19] reinforces the trend of Kosovo acting as a near-shoring manufacturing hub for European partners seeking sustainable packaging solutions.

4. Niche Circular Models: Glass, Organics, Tires, and Paper

Beyond the commodity giants of metal and plastic, a vibrant ecosystem of niche players is emerging to tackle difficult waste streams. These entities often blend profit motives with social entrepreneurship and are frequently supported by donor grants due to the tougher economics of their specific materials.

4.1 Glass: Breaking the Cycle of Disposal

For years, Kosovo lacked any industrial solution for glass waste, leading to massive accumulation in landfills. **Kosovo Glass Recycling**, founded by Dugagjin Berisha in Gjakovë, has emerged to fill this void.[20] Processing up to 300,000 kg annually, this company transforms glass bottles and jars into terrazzo tiles, countertops, and glass media for pool filtration.[21]

This venture is particularly significant because glass is heavy and low-value, making it uneconomical to export. A local solution was the only viable path. By turning waste glass into high-value construction and aesthetic materials (terrazzo), Kosovo Glass Recycling creates a

local market for a material that was previously a dead weight on the waste management system.

4.2 Upcycling and Social Impact: Simply Green

Simply Green, based in Prishtina, represents the intersection of circularity and social justice. This social enterprise focuses on upcycling car tires—a problematic waste stream often burned for heat, releasing toxic fumes—into furniture and design elements.[22]

What distinguishes Simply Green is its explicit focus on gender. The waste sector is traditionally male-dominated, but Simply Green aims to empower women by training them in carpentry and design, challenging the social norms of the industry.[23] While their volume of waste processed may be lower than an industrial recycler, their "per-ton" social impact is significantly higher, raising awareness and changing consumer perceptions about the value of waste.

4.3 The Energy-Waste Nexus: Bio 365 and Eco Kos

The management of organic and liquid waste is critical for environmental health.

- **Eco Kos** specializes in the collection of Used Cooking Oil (UCO) from the hospitality sector.[24] By aggregating this oil and securing **ISCC EU Certification** [25], they ensure it enters the sustainable biodiesel supply chain rather than clogging municipal sewers.
- **Bio 365 Kosova** tackles agricultural waste. The company converts biomass residues from essential oil distillation into energy pellets.[26] This is a classic example of industrial symbiosis, where the waste of one process (distillation) becomes the fuel for another, reducing the carbon footprint of the agricultural sector.

4.4 Paper and Document Destruction: KMM Recycling

KMM Recycling, a subsidiary of a major Israeli recycling firm, brings advanced logistics to the paper sector.[27] With a focus on document destruction and paper recycling, KMM services the corporate and institutional market in Prishtina.[28] Their presence underscores the role of secure waste management—banks and government agencies need assurance that their

documents are not just recycled, but destroyed confidentially. KMM's investment in Kosovo serves as another example of how foreign expertise helps professionalize specific service verticals.

Lirimi Group (Orto Paper) also plays a role in the paper value chain. As a producer of industrial paper bags and flour sacks [29], they act as a downstream user of paper products. While the snippet focuses on their production, companies like Lirimi are essential stakeholders in the paper recycling loop, both as generators of industrial trim waste and potential users of recycled pulp.

5. Institutional and Social Frameworks

The hardware of recycling (machines, trucks) relies on the software of society (behavior, policy, education). A network of NGOs and institutions supports the private sector.

5.1 The Third Sector: Green Art Center (GAC)

The **Green Art Center (GAC)** acts as the primary educator and community mobilizer. In a country where only 5% of households separate waste [3], the hardware of REKS or Rec-Kos is starved of clean material. GAC bridges this gap by running programs in schools and municipalities to teach the basics of separation and environmental stewardship.[30] Their work creates the "social license" for recycling and prepares the next generation of consumers.

5.2 Innovation Accelerators

The transition is also supported by innovation hubs like the **Balkan Green Foundation** and **UNDP's BOOST** program. These organizations run competitions like "Balkan Green Ideas," providing seed funding and mentorship to early-stage green startups.[20] Startups like **PNC** (providing digital waste reduction software) [20] have emerged from these incubators. PNC represents the digitalization of the sector, using data to help manufacturers reduce waste at the source—the highest level of the waste hierarchy.

5.3 Gender and the Circular Economy

Research by GIZ has highlighted the gendered dimensions of the circular economy in Kosovo. Women spend up to 300% more time on unpaid care activities than men, which significantly limits their time and capacity to engage in entrepreneurial activities in the waste sector.[32] Furthermore, women are underrepresented in corporate boards and face higher barriers to financing. Projects like **Simply Green** and specific grants for women-owned enterprises are attempting to correct this imbalance, recognizing that a truly circular economy must also be socially inclusive.

6. Quantitative Analysis and Directory of Actors

Table 1: Industrial Recyclers and Processors

Organization	Location	Material Focus	Strategic Role	Contact/Details
Rec-Kos LLC	Fushë Kosovë	Metals (Fe/Non-Fe), WEEE, Haz-Waste	Largest exporter; Industrial decommissioning.	+383 49 999 821 / info@reckos.net [4]
REKS LLC	Kaçanik	Plastic (LDPE/LLDPE)	High-tech washing line; JV with KIVO/KRAS.	+383 290 170 170 / reks.eu [8]
Plastika	Drenas	Plastic (Agri-foils)	Vertical integration;	+383 44 115 329 /

			Manufacturing finished goods.	plastika-ks.com [18]
Horn-Co	Deqan	Refractory Minerals	Niche industrial recycling; German subsidiary.	horn-co.de / +383 45 179 179 [16]
Kosovo Glass Recycling	Gjakovë	Glass	Only glass recycler; Terrazzo production.	+383 49 825 844 / kosovoglassrecycling.com [33]
Thes-Ari Recycling	Viti	Metals	EU-project partner; Regional collection.	N/A [15]
Italy Recycling	Obiliq	General/Shredding	Waste processing and physical separation.	045/303-040 / italyrecycling@gmail.com [34]

Table 2: Collection, Management, and Niche Actors

Organization	**Location**	**Material Focus**	**Strategic Role**	**Contact/Details**
KMM Recycling	Prishtina	Paper, Documents	Secure destruction; Israeli investment.	kmm.org.il [27]

Eco Kos	Prishtina	UCO (Cooking Oil)	Biofuel feedstock collection; ISCC Certified.	+383 49 202 432 / eco-kos.com [24]
Simply Green	Prishtina	Tires, Upcycling	Social enterprise; Women's empowerment.	simplygreen-ks.com [22]
Bio 365 Kosova	Prishtina	Biomass/Pellets	Agricultural waste-to-energy.	bio365kosova@gmail.com [35]
Vishi Group	Prishtina	WEEE	Electronic waste collection specialist.	Rr. Muharrem Fejza [36]
Naimi Metal Recycling	Podujevë	Scrap Metal	Regional collection hub.	Magjistralja Prishtine-Podujeve [12]
Blerimi	Ferizaj	Scrap/Auto	Automotive waste collection.	+383 44 843 621 [37]
Green Art Center	Prishtina	Education	NGO; Community awareness programs.	info@greenartcenter.org [30]
Er-Lis Sh.p.k.	Kosovo	Municipal Waste	Contracted waste collection services.	Listed in procurement [38]

Table 3: Key Statistics and Market Indicators

Indicator	Value	Source
Waste Generation Per Capita	271.67 kg/year	[3]
Total Municipal Waste Collected	~430,145 tons/year	[3]
Household Separation Rate	~5%	[3]
Value of Recycled Exports	€52.1 Million	[3]
Dominant Recycled Material	Ferrous Metals (69%)	[3]
Urban Collection Coverage	90-95%	[1]

7. Challenges, Gaps, and Future Outlook

Despite the robust growth of private actors, the sector faces systemic hurdles that limit its potential to fully embrace the circular economy.

7.1 The "Missing Middle" Infrastructure Gap

The most glaring deficit is the lack of municipal sorting infrastructure—the "missing middle." While Kosovo has efficient collection (trucks) and efficient processing (factories like REKS), it lacks the intermediate step: Material Recovery Facilities (MRFs) that can sort mixed household waste. Private companies have responded by bypassing households entirely, focusing on

commercial clients. This leaves the vast majority of consumer waste destined for landfills. The "Support Waste Management in Kosovo" (WMK) project attempted to address this by supporting the Ministry in developing tools and monitoring systems [9], but physical infrastructure lags behind policy.

7.2 Energy Security as an Industrial Risk

Recycling is energy-intensive. The melting of plastic and the baling of metal require consistent, high-voltage electricity. Plastika's management explicitly highlighted power outages as a critical challenge that damages machinery and disrupts production schedules.[6] For Kosovo to attract further industrial FDI in recycling, the stability of the energy grid is a prerequisite.

7.3 The Strategic Road Ahead: 2021-2030

The "Kosovo Integrated Waste Management Strategy 2021–2030" sets the roadmap for the next decade. Unlike previous strategies, this document emphasizes the transition to a circular economy not just as an environmental necessity but as an employment strategy.[1] The integration of informal waste pickers, the enforcement of the polluter-pays principle, and the fostering of inter-municipal cooperation are key pillars.

The future of the sector likely lies in the continued professionalization of niche streams. Just as **Kosovo Glass Recycling** solved the glass problem, new actors will likely emerge for textiles and construction waste, driven by the same mix of donor support and entrepreneurial grit that has defined the sector to date. The foundation has been laid by the companies profiled in this report; the challenge now is to scale these islands of excellence into a cohesive, national system.

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