The Euro Report 4: Germany: Europe’s Largest Electronics Market Can’t Account for Its Own E-Waste

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Germany is not France, and it is not the Netherlands. The first two Euro Reports told stories of countries building visible, coherent lifecycle-management systems - a repairability index in France, a national collection rate approaching 70% in the Netherlands. Germany’s story is less flattering and more useful. It is Europe’s largest electronics market by a wide margin, and by the German government’s own measurement, one of the region’s weaker performers at actually collecting what it places on the market. That gap - between market size and system performance - is where the opportunity for ITAD operators, recyclers, and investors sits.

This report is organized around that gap rather than around a single success story, and it follows the gap into three places most country-level electronics briefings have tended to ignore: the unresolved question of where a meaningful share of “reusable” German electronics actually end up, the battery-recycling buildout tied to Germany’s automotive industry, and the solar-panel waste wave the country will face before almost anyone else. All three are underexamined relative to the WEEE collection numbers that usually anchor these reports, and all three are more relevant to what a lifecycle-management or ITAD strategy in Germany should actually look like over the next five years.

This Report Addresses

- Why Germany’s own environmental agency describes e-waste collection performance as having fallen further from EU targets since a 2022 legal reform that was supposed to fix it.
- The documented, if uncomfortable, question of where a meaningful share of Germany’s placed-on-market electronics actually ends up, and why consumer hoarding behavior compounds the collection problem.
- The two companies that anchor Germany’s enterprise IT lifecycle market - one a leasing group with an €11.7 billion technology portfolio, the other Europe’s largest

nonprofit IT remarketer - and what their business models reveal about where margin sits.

- Where consumer-side refurbishment (rebuy and its peers) fits alongside the enterprise layer, and why the two rarely overlap.
- Why Germany’s automotive industry is turning the country into one of Europe’s most important lithium-ion battery recycling hubs, and what that means for adjacent electronics recovery capacity.
- The solar-panel waste wave Germany will face years ahead of most of the rest of Europe, and the recycling capacity being built to meet it.
- Frankfurt’s data center buildout, which is a far larger and better-documented growth story than the WEEE system, and what it means for the next decade of decommissioning volume.
- What a thin, under-consolidated German ITAD M&A market means for U.S. entrants weighing acquisition versus partnership.

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