CONSTRUCTION *GOES* CIRCULAR

Whitepaper

Construction Goes Circular (CGC)

Construction and demolition waste (CDW) represents one of the main material streams in Spain and poses a structural challenge in the transition toward a more circular model. Despite technological and regulatory advances, its management remains fragmented and predominantly linear, generating costs where opportunities could be created.

Construction Goes Circular (CGC) emerges as a response to this systemic gap. Originating from a pilot project validated in more than two hundred construction sites with the participation of over seventy companies, CGC has evolved into a formal association aimed at coordinating circular solutions throughout the entire construction value chain.

Its distinctive element lies in integrating complete value-chain representation, structured governance, and a multilateral approach across different material streams within a neutral platform. In this way, it transforms isolated efforts into a coordinated and systematic design.

CGC does not replace existing initiatives; it connects and strengthens them. Its purpose is to catalyze the circular economy in construction and provide the institutional framework that enables the consolidation and scaling of this transition.

March 2026

Figure 1: Segregation of materials for reuse and recycling. Saint-Gobain

The structural challenge of CDW in Spain

Construction and demolition waste constitutes one of the largest material streams in Spain and represents a significant share of total waste generated. At the European level, the construction sector generates roughly one-third of total waste, consumes about 40% of energy, and accounts for around 20% of CO2 emissions. However, less than 7% of materials used in the economy are currently reincorporated into productive cycles.

These figures highlight the structural weight of the sector in the transition toward circularity. Despite this, the operating model of CDW management has scarcely evolved:

- **CDW management continues to be predominantly linear.** Materials are treated as a disposal problem rather than structured resource flows. A significant portion of CDW is sent to low-added-value operations or landfill, without preserving its technical and economic value. Segregation practices vary across construction sites, and the quality of the resulting stream is difficult to valorize in higher-value applications.
- **Responsibilities remain fragmented among multiple actors**, with limited coordination between material design, on-site segregation, logistics, treatment capacity, and industrial demand.
- **Administrative and regulatory frameworks** – especially regarding waste classification and end-of-waste status – generate uncertainty and procedural complexity that slow down the implementation of circular solutions, even when these are technically viable.

The result is structural inefficiency: materials with recoverable value generate costs instead of opportunities, while environmental impact remains unnecessarily high.

The challenge does not lie in the absence of technology nor in the absence of industrial demand. What is missing is a coordinated system capable of aligning actors, standardizing practices, and transforming fragmented flows into reliable material streams that can be reintegrated into the economy.

The emergence of Construction Goes Circular

Construction Goes Circular emerged as an industry-driven response to structural inefficiencies in CDW management in Spain. The initiative began in 2024 as **Paper Sacks Go Circular**, a pilot project focused on recovering and recycling paper sacks used in construction. What started as a solution for a single material stream quickly revealed a broader conclusion: circularity in construction cannot scale through isolated initiatives; it requires coordinated alignment across the entire value chain.

Based on the operational results, the model expanded to other material streams, forming an **alliance**. More than seventy companies participated and over two hundred worksites adopted structured segregation frameworks, validating the model in real-world conditions.

Once scale had been reached and trust among the actors had been consolidated, a core group of twelve companies representing the entire value chain decided to formalize the initiative as an **association**. The goal was to provide it with structured governance, ensure its continuity, and enable the systematic scalability of circular solutions across different materials and regions.

The evolution from pilot to alliance, and from there to a formal association, reflects a deliberate progression: from experimentation to validation and, finally, to institutionalization.

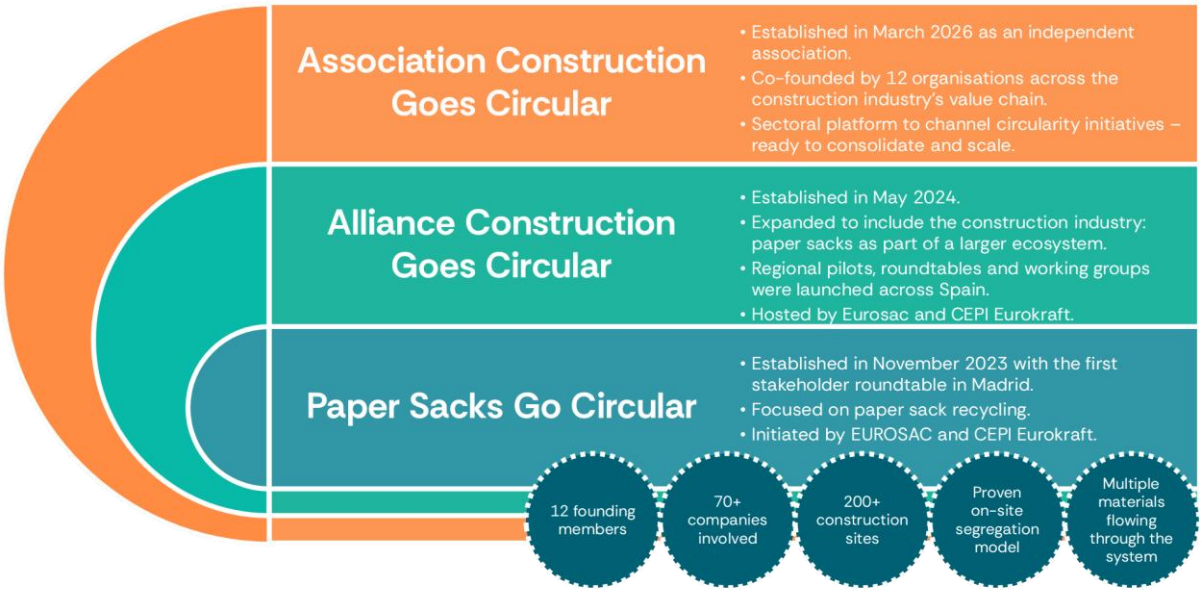


Figure 2: The evolution of Construction Goes Circular

Stakeholder collaboration as a structural advantage

The transformation of construction and demolition waste management cannot be achieved through unilateral actions. The construction ecosystem is inherently interdependent: the design of materials determines their recyclability; on-site practices determine the quality of segregation; logistics and treatment capacity influence viability; and industrial demand defines the final value.

However, these interactions have historically operated in a fragmented way.

Construction Goes Circular is based on the recognition that circularity requires coordinated alignment across the entire value chain. By integrating construction companies, material manufacturers, waste managers, recyclers, industrial users, and sectoral associations into a common framework, CGC creates a structured environment where these interdependencies can be actively managed.

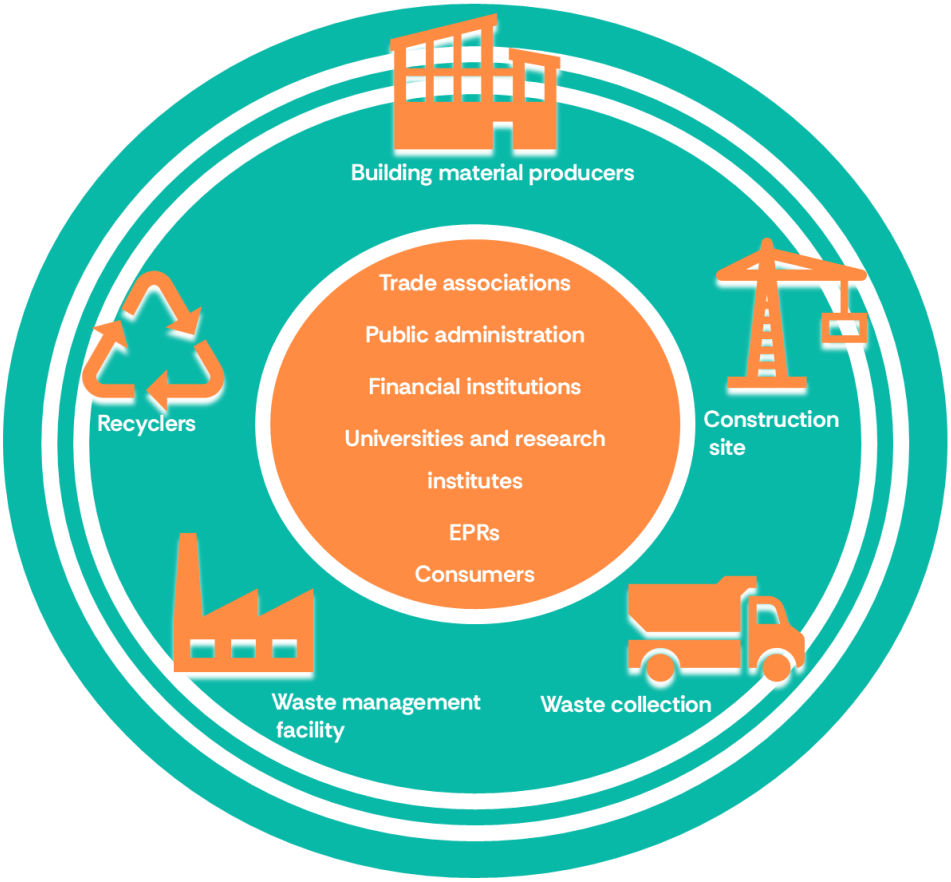


Figure 3: Key stakeholders involved in Construction Goes Circular

Collective value:

- Faster deployment of systemic circular solutions.
- Shared risk and costs for complex regulatory and technical challenges.
- Systemic alignment of environmental, economic and social impacts.
- Transformation of waste management from a cost center into a value-generating system.

Material producers:

- Support for regulatory compliance.

- Streamlined access to higher-quality recycled materials, reducing supply risk.

-Co-development of systemic solutions for their material streams.

- Credible circular positioning backed by on-site implementation.

Construction companies:

- Tested on-site waste segregation models.

- Reduced operational complexity through standardized practices.

- Improved regulatory compliance, ESG reporting support.

- Lower disposal costs, better visibility of waste flows.

Waste collectors and managers:

- Access to new, better-defined material streams.

- Higher material value due to pre-sorted waste.

- Reduced uncertainty in downstream treatment and valorization routes.

- Evolution towards a strategic role within the circular system.

Recyclers:

- More consistent and stable feedstock quality.

- Improved predictability of supply volumes, reduced supply risks.

- More influence over collection practices.

- Reduced contamination and processing costs.

- Stronger business case for investments in recycling capacity.

Figure 4: CGC framework for systemic value creation

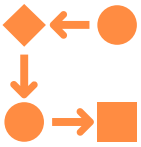
Governance as an enabler of execution

Collaboration creates the conditions for systemic thinking. However, to translate that alignment into scalable and sustained implementation, a structured and balanced governance model is essential.

Construction Goes Circular has evolved into a **formal association** with a model designed to ensure stability, transparency, and long-term continuity.

Its **governing body** reflects not only the diversity of the value chain—manufacturers, construction companies, waste managers, recyclers, and sectoral associations—but also the plurality of material streams and geographical realities in Spain. This multidimensional representation provides structural balance and prevents strategic decisions from responding to a single material interest, business model, or regional context.

Each **material stream** presents specific technical and economic challenges, and regional conditions influence logistics, treatment capacity, and regulatory demands. Integrating these perspectives into governance strengthens the legitimacy of the model and reduces the risk of fragmentation or sectoral bias.



Project development follows a **defined and transparent process**: identifying systemic challenges, forming technical working groups, defining measurable objectives, and implementing pilots under real operating conditions, with data-based evaluation and replicability potential.

By distributing responsibilities and reducing individual exposure to technical and regulatory uncertainty, the **governance model lowers barriers to innovation** and transforms collaboration into an executable and scalable operating model.

Governance is not an additional administrative layer; it is the **mechanism that turns coordination into sustained structural change.**

Flagship project: Demolition as a production process

The governance and collaboration model of Construction Goes Circular is embodied in a **flagship project** that demonstrates how systemic coordination can transform the management of construction and demolition waste.

Across more than two hundred worksites, CGC has implemented a structured segregation model based on defined quality criteria, traceability, and clearly identified valorization pathways. This framework ensures that material streams are generated under controlled conditions, improving their quality and their suitability for higher-value applications.

Figure 5: Segregation at construction sites

Although recovery technologies exist for numerous materials, their scalability is often limited by fragmentation, variability in quality, and an uneven distribution of treatment capacity. The project addresses these limitations by aligning value-chain actors within a shared system.

Within this framework, complementary pathways are integrated, including:

- Closed-loop solutions developed by manufacturers
- Specialized recycling operators
- Regional and large-scale industrial users

Industrial actors such as cement producers can provide complementary capacity when regional infrastructure is insufficient or unbalanced, strengthening the resilience of the system without replacing specific recycling solutions.

By combining source segregation, defined characterization standards, verified industrial demand, and coordinated decision-making, demolition sites can operate as structured points for generating secondary raw materials.

In this context, end-of-waste status acts as a practical enabler: when materials meet defined criteria and have identified end uses, administrative barriers can be reduced and circular solutions accelerated.

This project demonstrates that circularity in construction does not scale through isolated recycling initiatives. It scales when process design, industrial demand, and the regulatory framework are integrated within a coordinated system.
Construction Goes Circular provides that system.

Roadmap: from systematization to scale

The evolution of Construction Goes Circular from a pilot initiative to a structured association establishes the foundations for long-term systemic transformation. The next phase is aimed at consolidating and scaling what has already been validated under real operating conditions.

In the **short term**, the priority is systematization: refining operational models, strengthening the measurement of outcomes, and ensuring that projects are carried out under clearly defined technical and governance frameworks. The goal is to move from successful experiences to standardized and replicable approaches across regions and material streams.

In parallel, a structured dialogue will be promoted with public authorities and regulatory bodies to reduce procedural complexity and facilitate the practical application of circular pathways, particularly regarding end-of-waste status and traceability.

In the **medium term**, the ambition is to integrate circular models into standard construction and demolition practices in Spain, expanding the membership base, reinforcing territorial representation, and consolidating a portfolio of proven and scalable solutions.

The milestones accompanying this evolution reflect a clear trajectory: advancing from coordinated experimentation toward the structural integration of circularity within the sector.

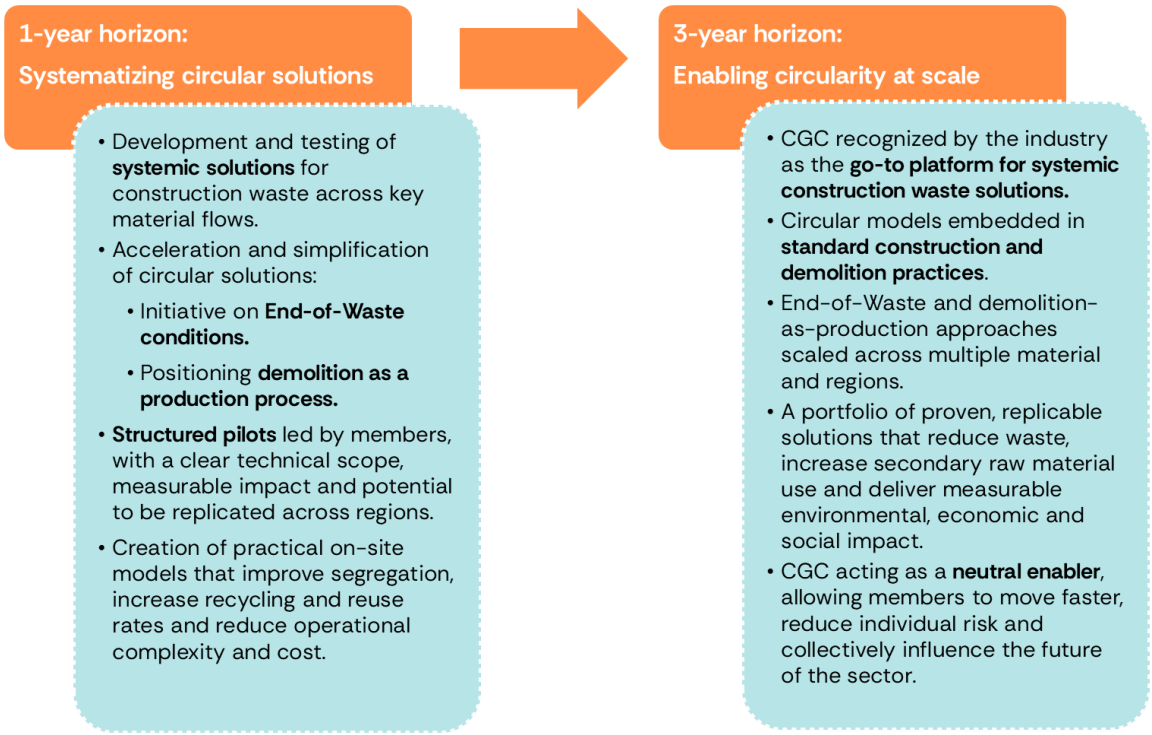


Figure 6: Short and medium-term objectives

Participation and collective commitment

The systemic transformation of construction and demolition waste management requires sustained commitment from the entire construction ecosystem.

CGC provides a structured framework through which the different actors can contribute according to their role, expertise, and level of involvement. Participation may range from strategic engagement in governance bodies to operational leadership in pilot projects or technical collaboration in working groups.

By joining CGC, organizations become part of a coordinated effort to define practical operating models, reduce systemic inefficiencies, and strengthen the sector's circular performance. The association ensures transparency, balanced representation, and defined processes that facilitate constructive and pre-competitive collaboration.

Spain's construction sector is facing a structural transition. CGC offers an established platform from which this transition can be collectively defined, implemented, and scaled.

Figure 7: CDW represents almost 40% of total waste produced in the EU. Saint-Gobain

Conclusion: transform the system together

Circularity in construction does not depend solely on products being recyclable. It requires systems capable of collecting, classifying, recovering, and reintegrating materials under coherent technical, economic, and regulatory conditions. The challenge is not individual; it is structural.

CGC demonstrates that cross-sector collaboration among actors in the value chain makes it possible to turn circularity into a viable operating model. By aligning interests, sharing responsibilities, and establishing balanced governance frameworks, waste can be transformed into a resource, regulatory compliance into opportunity, and sustainability into a true driver of sector-wide transformation.

The accumulated experience shows that change does not occur through isolated efforts, but through structured coordination and shared vision.

The future of the circular economy in construction is not defined by individual initiatives, but by the sector's ability to collectively move forward under a common system that provides stability, coherence, and scale.

Construction Goes Circular offers that framework, and the challenge lies in consolidating it and enabling it to grow.

Contact information

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Figure 8: First roundtable in 2023

CONSTRUCTION GOES CIRCULAR

Constructing systemic solutions for construction and demolition waste

Founded by:

Envalora

SAINT-GOBAIN

Calaf Constructora

mondi

MALTRAN, S.L.U.

SOPREMA
Building for Life

eurosac

Grupo arpada

HOLCIM

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