



# Recycling Still Matters



New Mexico Recycling Coalition Annual Meeting  
Dylan de Thomas, The Recycling Partnership  
September 2018

# TOGETHER

**Transforming Recycling For Good**



# We're all in this bin together



[recyclingpartnership.org](http://recyclingpartnership.org)

**We Are Only Recycling  
Half Of What We Could**

# THE RECYCLING SYSTEM IS LOOSELY CONNECTED, HIGHLY DEPENDENT





**Only half of Americans can recycle at home as easily as they can throw something away.\***

**Those that can recycle easily are only recycling half of what they could.\*\***

\* 2015-16 Centralized Study on Availability of Recycling.

<https://recycle.com/spc-recycling-access-study/>

\*\* 2016 State of Curbside Report



**Each day we work together with communities and companies to help families in America recycle, and recycle well.**





## How?

Increase access to recycling

Increase capture of recyclables

Improve quality of recyclables



# OUR WORKING MODEL

## INFRASTRUCTURE

Cart grants deliver year over year results and measurable incremental tonnage. We leverage our funders' dollars on average by about 8:1.



## EXPERT ASSISTANCE

Technical team has best relationships with thousands of communities. Aligning operations and education helps cities deliver better recycling.



## TOOLS AND DATA

More than 20K local programs lack resources but determine success. We have the most robust data in the industry and it's getting better every month.



## SYSTEM SOLUTIONS

The system is loosely connected but highly dependent. We collaborate across the industry to bring harmonization in a dis-harmonized environment.



**THE RECYCLING  
PARTNERSHIP**



# What are we talking about today?



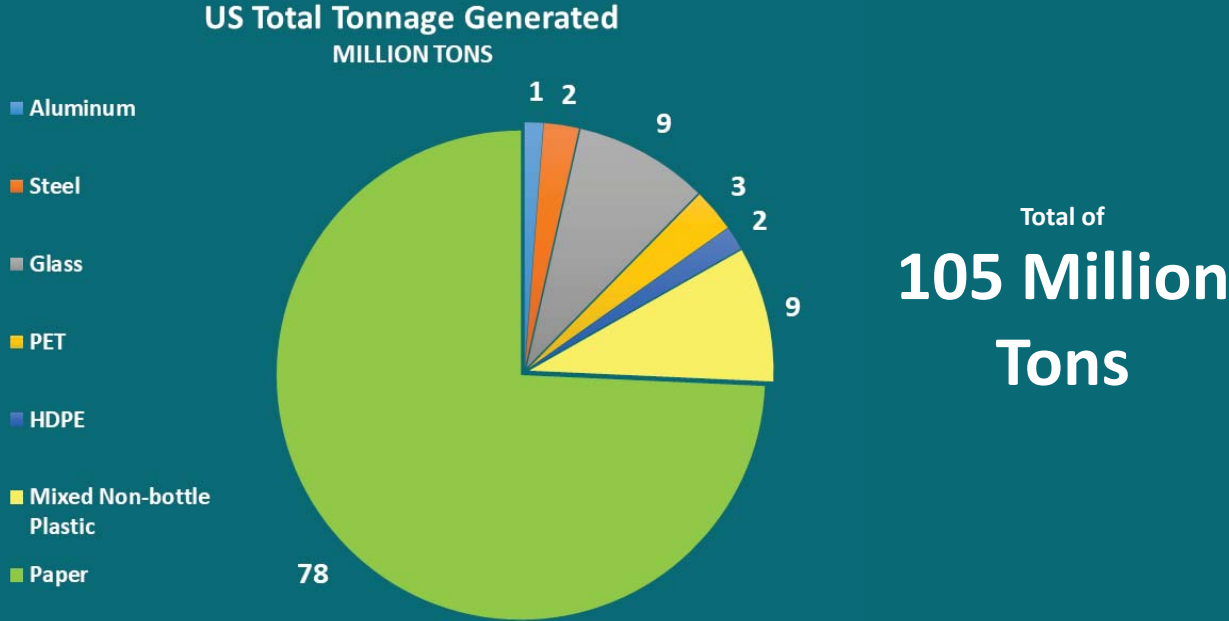
- **National Recycling Landscape**
- **China!**
- **Why Does What We Do Matter?**
- **Four Challenges?!**
- **Pandas?!?**



# The National Recycling Landscape

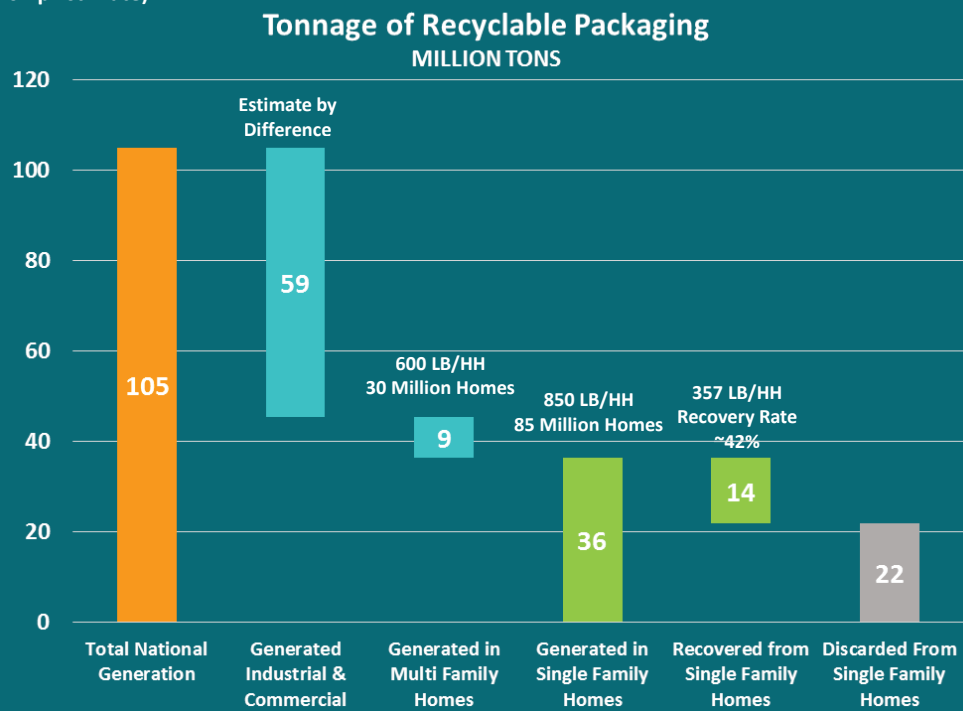
# How Much Recyclable Packaging and Printed Paper Is Generated Every Year?

All Sources

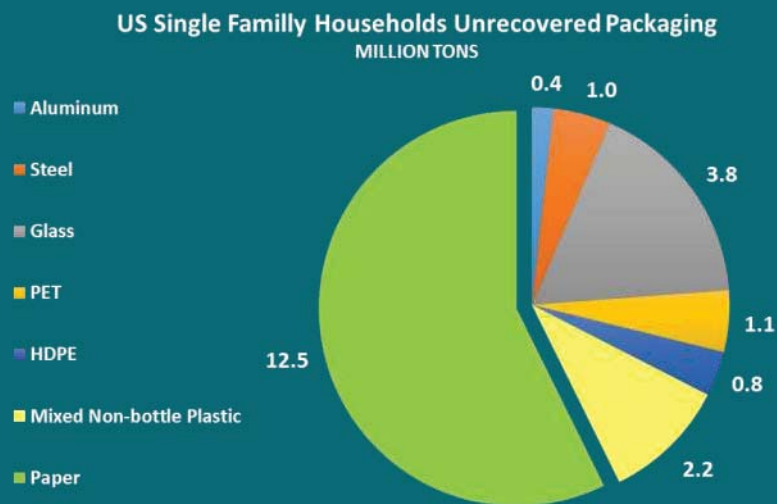


## Location of Recyclable Packaging Tonnage

(Partnership Estimate)



# How Much Recyclable Material Is Left in Single Family Homes?



**A Total of 22 Million Tons**





# National Sword + China's Scrap Ban

**What comes next after China's  
scrap ban surprise?**

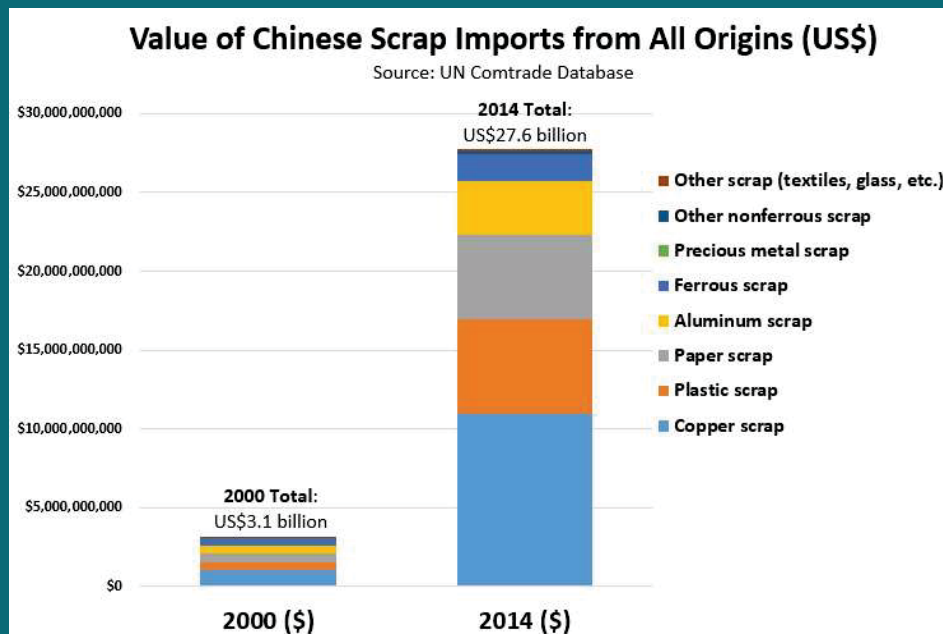
**Recyclables may hit Chinese wall**

**China Doesn't Want  
Your Trash**



**Recycling Corner: A Dear John Letter from Xi Jinping**

# Where Did This All Start?





# Where Did It Come From?

- Like Green Fence in 2013, National Sword stemmed from a media scandal
- At core, a political issue for China



# What is the Goal of These Actions?

- Consolidation of recycling facilities into “Eco-Parks”
- Larger, cleaner, better-regulated facilities
- Bolster own domestic markets
- Spur modern solid-waste management



# What's Happening and Where?

- 13 states "Heavy"
- 28 states "Noticeable"
- 10 "minimal"
- Impacts on Western States most acute

State	Disposal Ban	Landfilling	Accepted Materials Chang	Effects	Contamination Work?
Alabama	N			Noticable	
Alaska	N	Y	Y	Heavy	
Arizona	N	Y	Y	Heavy	Y - in Phoenix
Arkansas	N		Y - at drop-off	Minimal	
California	Y - Partial, not f	Y - Composting	Y - at some drop-offs	Heavy	Y
Colorado	N		Y	Noticable	Y
Connecticut	Y			Noticable	Y - Workshops
Delaware	Y			Noticable	
District of Colum	Y			Noticable	
Florida	N	Y	Might be in future	Noticable	Y - campaigns
Georgia	N		Y	Noticable	Y
Hawaii	N		Y	Heavy	Y
Idaho	N		Y	Heavy	
Illinois	N			Noticable	Y
Indiana	N		Y	Noticable	Y
Iowa	N	Y	Y	Noticable	Y
Kansas	N			Noticable	
Kentucky	N			Minimal	
Louisiana	N			Minimal	
Maine	N		Y	Noticable	Y - campaigns
Maryland	N		Y	Noticable	
Massachusetts	Y		Y	Heavy	Y - TRP Recycling IQ Kit

# What's Happening and Where?

- Some landfilling (14 states)
- Accepted materials lists changing (26 states)
- Other SE Asian Countries, but that is shifting

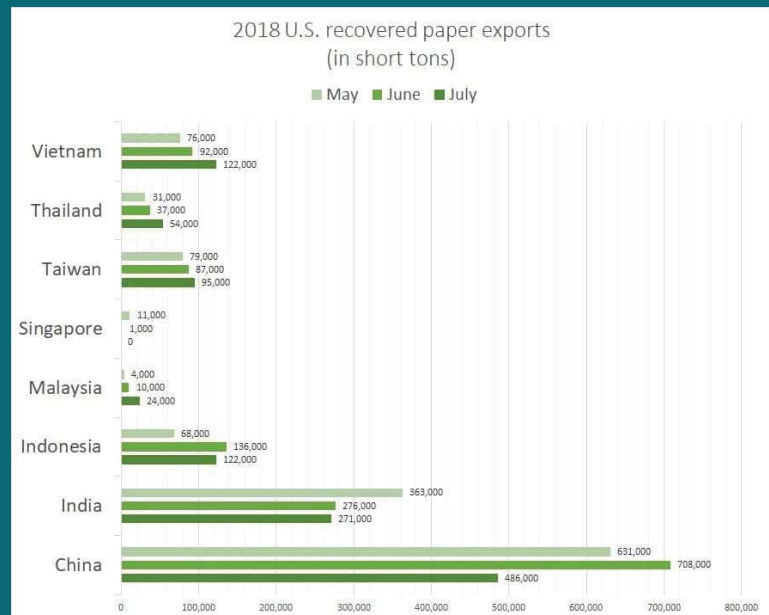
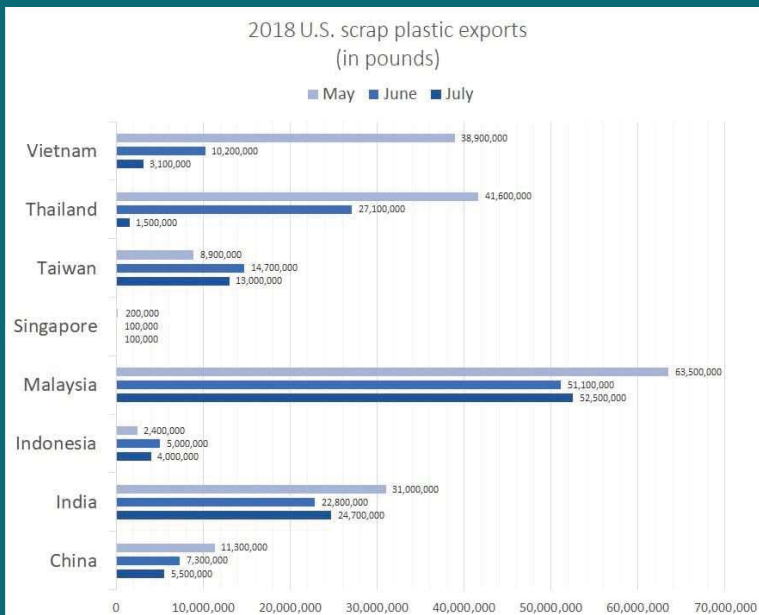




# What's Happening and Where?

- 0.5% prohibitives on scrap material sold (was a total ban for month of May)
- 25% tariffs now in place for OCC, steel, paper, plastics; 50% on alu
- ISRI estimates this will affect 676,000 metric tons of material, worth approximately \$278 million, for 2018. An additional 85,000 metric tons, worth more than \$117 million, will be affected in 2019.

# Where is it Going?



Here are  
some  
pandas.





# Why Does Our Work Matter?

# Why Does It Matter?

**Recycling Creates Jobs, Helps the Environment and Builds Strong Communities**

**500K+ jobs**  
direct, indirect  
across the US

=

**\$34B**  
annual wages,  
benefits

**10%** increase in capture of  
recyclables in homes that are  
**already** recycling

=

**10% More Materials**  
**10% More Jobs**

# What Does It Really Take To Recycle Right?



Yet many don't know what  
"RECYCLE RIGHT" means.



Up to 40%

said one or more  
core recyclables  
were **not recyclable**



80% carts had plastic bags

Recycling Partnership 2017 Study in Chicago

## But I Hear Recycling Is Dead, Broken, In Crisis

**THE RUMORS  
OF  
RECYCLING'S  
DEATH HAVE  
BEEN GREATLY  
EXAGGERATED.**

Big investments in domestic paper recycling.

More than \$1B invest in domestic plastics recovery in the last 10 years.

Communities upgrading programs and fighting contamination.



**Thanks,  
pandas.**

