What’s Hot; What’s Not ... What Will Be – National Overview

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TOGETHER
Transforming Recycling For Good

THE RECYCLING PARTNERSHIP™
We’re all in this bin together
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.**

** 2016 State of Curbside Report
OUR WORKING MODEL

INFRASTRUCTURE
Cart grants deliver year over year results and measurable incremental tonnage.

EXPERT ASSISTANCE
Aligning operations and education helps cities deliver better recycling.

TOOLS AND DATA
More than 20K local programs lack resources but determine success.

SYSTEM SOLUTIONS
The system is loosely connected but highly dependent.
Making an Impact

- 1,075+ Communities Assisted
- HH Reached 50M+
- $43M+ Infrastructure
- New Carts 445K+
- New Diversion 231M+ LBS
- Water Savings 382 Million Gallons
- GHG Avoidance 253K Metric Tons
- Energy Savings 2.0 Trillion BTU/YR
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State and local government program engagement
What Are We Talking About Today?

- Markets!
- National Sword?
- National Sword!
- Lots of Bales
- Market Charts
- Panda Gifs
- SO MANY TOOLS!
Why Clean Up Recycling?
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
WE WERE EXTERNALIZING THE LABOR OF SORTING THE MATERIAL, BUT NOW THAT CHINA HAS GOTTEN TO THE POINT THAT THEIR OWN LABOR FORCE HAS MATURER AND GROWN, THEY’RE ABOUT TO EXTERNALIZE IT THEMSELVES.

THEY’RE STILL BUYING A LOT OF THE SAME MATERIALS: THEY’RE JUST BUYING IT FROM OTHER PARTS OF S.E. ASIA.

DYLAN DE THOMAS
V.P. OF INDUSTRY COLLABORATION AT THE RECYCLING PARTNERSHIP
Is the Sky Falling?

- Mixed paper value decline ($88 in Mar 2017 to about $0 now)
- Small number of programs closing/suspending operations
- Smaller number moving to Dual-Stream
Why?
Here are some pandas.
Looking at Commodity Values
Figure C: Paper Pricing in $/Short Ton Over Time

Data provided by RecyclingMarkets.net.
Figure B: Price of Lower Value Plastics in Cents/Pound Over Time

Data provided by RecyclingMarkets.net.
$0.1505/lb
National Average
SMP Index
Dec 2018

PET bale prices

Source: Resource Recycling
HDPE No. 2

Natural $0.3869/lb
Colored $0.1672/lb
National Average
SMP Index
Dec 2018
HDPE milk jug bale prices
• Paper and Plastics recovery capacity is growing in the U.S. to consume some of these materials (RMP, Plastics, etc.)
• Chinese investment a signal that the scrap ban is forever
National Plastics Recycling Investments
Over $300 MM in investments and over 328,000 tons of annual consumption
What’s Next for Plastics?

Plastics Reclaimers Buying and Building:

- EFS (HDPE, LDPE, PP)
- Azek (HDPE, LDPE)
- GDB International (HDPE, LDPE)
- East-Terra Plastics (HDPE, LDPE, PP, PET)
- PureCycle Technologies (PP)
- Merlin Plastics (LDPE, HDPE, PS)
- Peninsula Plastics (PET, PP, PE)
What’s Next for Plastics?

Plastics Reclaimers Buying and Building:

• Roy Tech (Post-Industrial)
• Ecomelida (Cartons, PE)
• GreenCycle (LDPE, Mixed Rigid/PE)
• Tian Yuan/Shaw Brothers (PE)
• Green Tech Solutions (E-Plastics)
• UPT (HDPE, LDPE, PC, Ag Plastics)
6.8 MILLION POUNDS OF POSTCONSUMER RESINS

PCR USES INCLUDE:
- GAYLORD LINERS
- GAYLORDS
- PACKAGING
- TIER/SLIP SHEETS
- TRASH BAGS

Post-Consumer Content in Industrial Goods

Become an APR Recycling DEMAND CHAMPION
National Paper Recycling Investments
Over $1.6 BN in investments + 2.6 MM tons of annual consumption
What’s Next for Paper?

Paper Mills Buying and Building:

• Pratt Industries (OCC, RMP)
• Green Bay Packaging (OCC, RMP)
• Cascades (OCC, RMP)
• Georgia-Pacific (Juno: Fiber from Landfill/Food-Contaminated)
What’s Next for Paper?

Paper Mills Buying and Building:

- Nine Dragons (OCC, RMP)
- Shanying International
- Bio Pappel OCC
- Ecomelida (Cartons, OCC)
Thanks, pandas.
We Want This
Not This
...Or This
Recycling is so easy!
Let's customize your campaign materials

Answer five questions to customize your FREE campaign materials to help tackle your top recycling issues. It's like magic, but more practical and effective.

LET'S GO
Tools for Contamination

1. ANTI-CONTAMINATION KIT WITH FREE CUSTOMIZABLE FILES
2. IMAGES, ICONS, MAGNETS, SOCIAL MEDIA KIT
How You Measure Matters!
The Path to Strong Program Metrics

FREE state of the art tool for tracking:
- Curbside recycling
- Drop-off recycling
- Multifamily Recycling
- Organics

Customized recommendations and solutions for your program

Build powerful year-over-year data

Quickly calculate and report key metrics

GET STARTED: https://recyclesearch.com/profile/mmp
THE RECYCLING PARTNERSHIP PRESENTS

GRAB & GO

SOCIAL MEDIA KIT

POSTS & POINTERS FOR YOUR PROGRAM

VOLUME 1
One more panda.
Thank You!

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