SWANA

SOLID WASTE ASSOCIATION OF NORTH AMERICA

The State of Recycling

David Biderman
Executive Director & CEO
dbiderman@swana.org

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What is SWANA?

Largest association for the waste & recycling sector in the U.S. & Canada

- 10,700+ individual members
- 47 chapters
- Members in private & public sectors - unique

Core programs focus on education, research, advocacy and safety – and our mission is "**advancing from solid waste management to resource management**"

- Before Covid, recycling was our #1 issue

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Recycling Challenges

SWANA has been a leader in providing information and guidance to recycling stakeholders since National Sword was announced in 2017

- The vulnerabilities of America's recycling system were exposed
  - Contamination
  - Dependent on exports
  - Fragmented – houses/multi-family/commerical
  - Older technologies/sorting systems
  - Patchwork of different rules and regulations
  - Changing stream
    - Lightweighting
    - Flexible plastics
    - Some MRFs were built to process newspapers, not Amazon boxes

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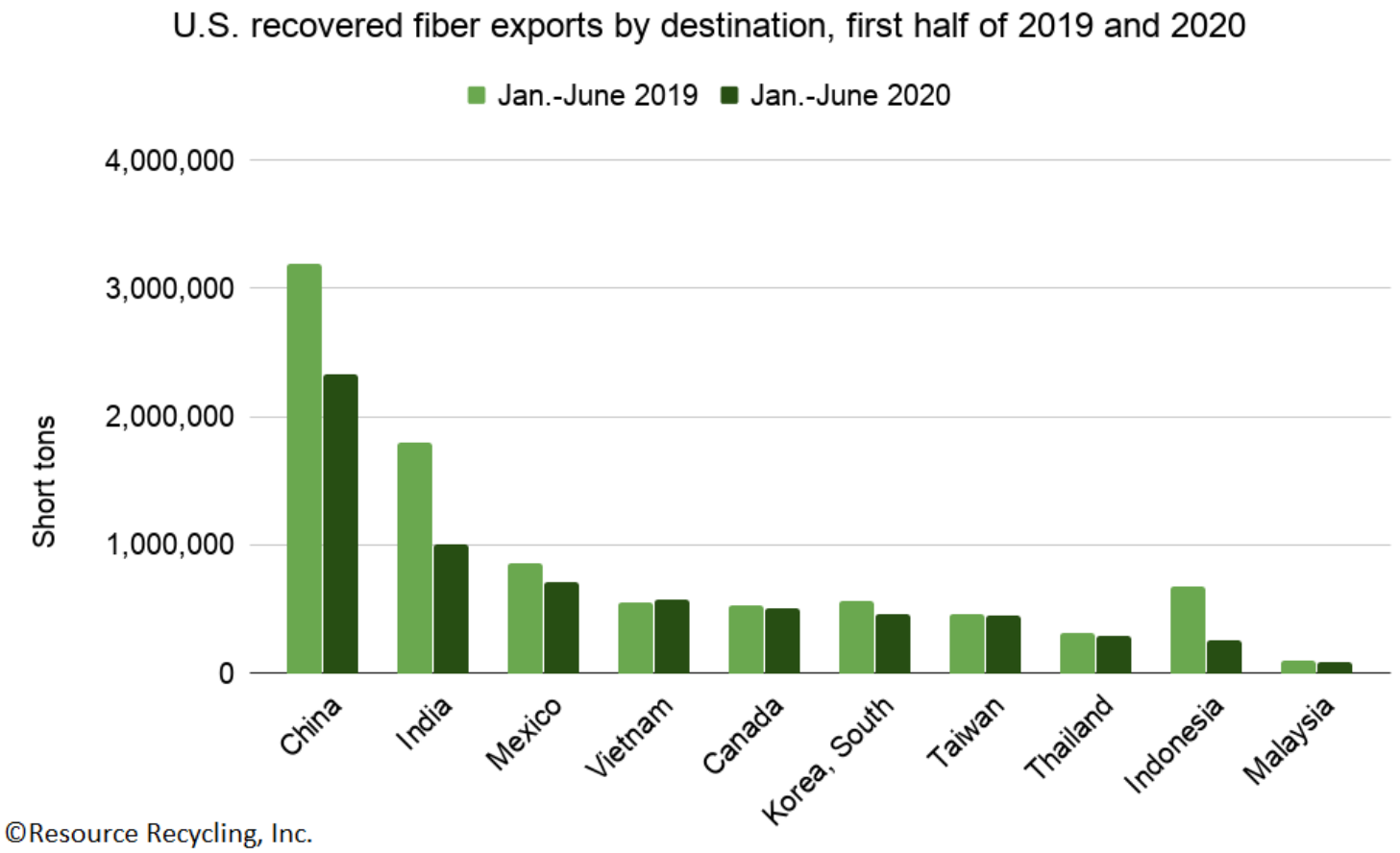
Paper Exports Declined 25%



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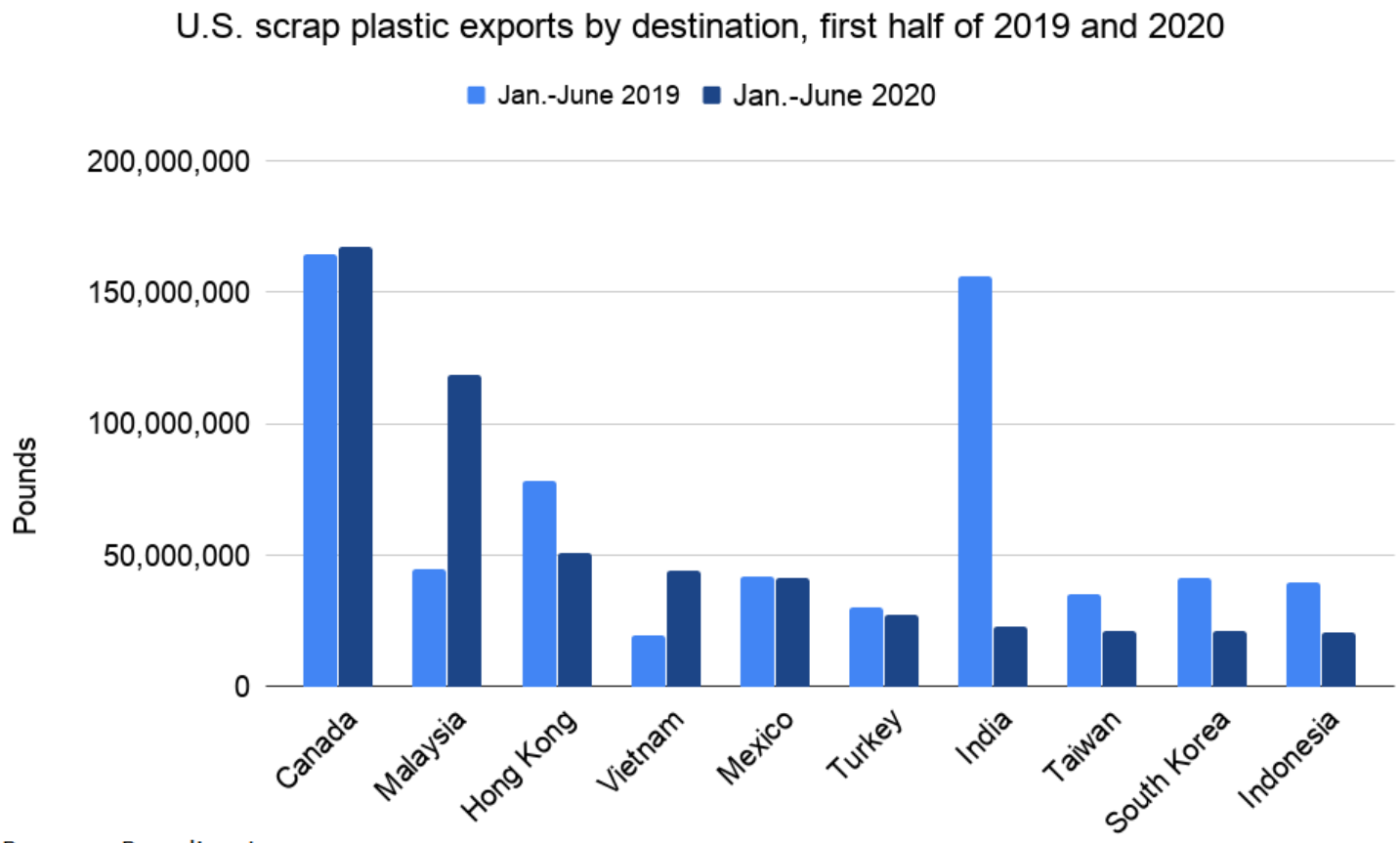
Plastics Exports Declined 18%



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COVID-19

The Covid-19 pandemic is having a number of impacts on recycling programs:

- Big shift from commercial to residential
  - Many communities saw resid volume increase 20+% - currently up 5-10% nationally
  - About 100 curbside collection programs were suspended b/c needed to focus on trash – majority have been restored
- OCC prices surged from $25 to $101/ton between Jan and May 2020 – have retraced back to $59/ton
- Mixed paper prices are positive again
- PET prices continue to decline
- HDPE value is increasing
- PP value increasing – increased demand for #5

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Federal Activities

SWANA has been heavily involved in federal policy discussions

- Communicating frequently with federal/state/local officials
  - Active participant in EPA's America Recycles network
  - Very supportive of EPA's efforts
  - Submitted testimony at hearings & provided comments on federal legislation
  - SWANA supports federal bills providing funds to local agencies and others for recycling
    - **Save Our Seas 2.0** – creates a Post-Consumer Materials management infrastructure Grant program that would provide $55M/year for 5 years – **Bill passed House and Senate** but different versions
    - **RECOVER Act** – would provide $500M over 5 years
    - **RECYCLE Act** – would provide $15M/year for 5 years; EPA would develop a model recycling program toolkit
    - **Break Free From Plastic Act** – bans single use plastics, establishes national Extended Producer Responsibility (EPR) and bottle bill/container deposit program

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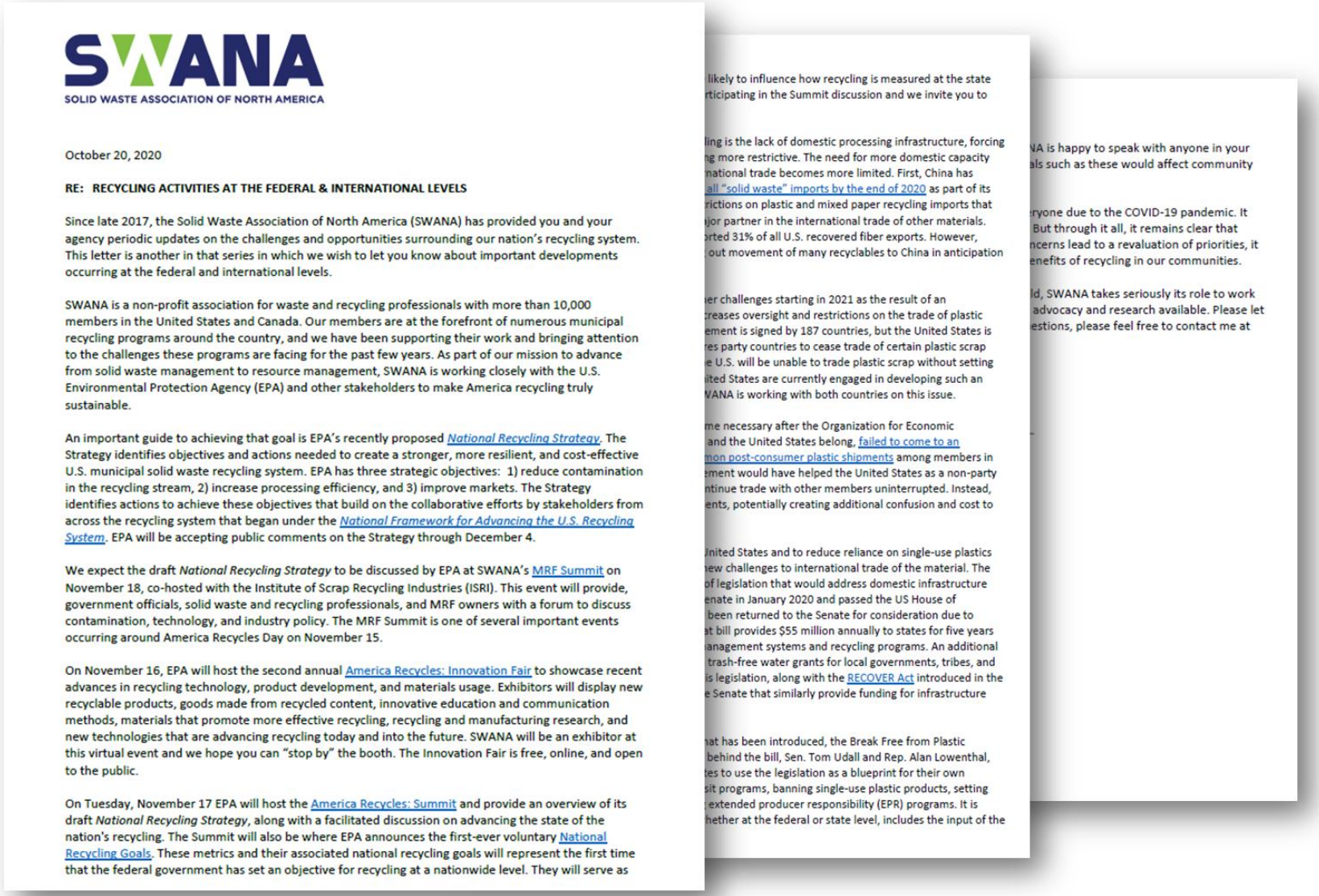
Update to State Environmental Agency Leaders



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October 20, 2020

RE: RECYCLING ACTIVITIES AT THE FEDERAL & INTERNATIONAL LEVELS

Since late 2017, the Solid Waste Association of North America (SWANA) has provided you and your agency periodic updates on the challenges and opportunities surrounding our nation's recycling system. This letter is another in that series in which we wish to let you know about important developments occurring at the federal and international levels.

SWANA is a non-profit association for waste and recycling professionals with more than 10,000 members in the United States and Canada. Our members are at the forefront of numerous municipal recycling programs around the country, and we have been supporting their work and bringing attention to the challenges these programs are facing for the past few years. As part of our mission to advance from solid waste management to resource management, SWANA is working closely with the U.S. Environmental Protection Agency (EPA) and other stakeholders to make America recycling truly sustainable.

An important guide to achieving that goal is EPA's recently proposed *National Recycling Strategy*. The Strategy identifies objectives and actions needed to create a stronger, more resilient, and cost-effective U.S. municipal solid waste recycling system. EPA has three strategic objectives: 1) reduce contamination in the recycling stream, 2) increase processing efficiency, and 3) improve markets. The Strategy identifies actions to achieve these objectives that build on the collaborative efforts by stakeholders from across the recycling system that began under the *National Framework for Advancing the U.S. Recycling System*. EPA will be accepting public comments on the Strategy through December 4.

We expect the draft *National Recycling Strategy* to be discussed by EPA at SWANA's MRF Summit on November 18, co-hosted with the Institute of Scrap Recycling Industries (ISRI). This event will provide, government officials, solid waste and recycling professionals, and MRF owners with a forum to discuss contamination, technology, and industry policy. The MRF Summit is one of several important events occurring around America Recycles Day on November 15.

On November 16, EPA will host the second annual America Recycles: Innovation Fair to showcase recent advances in recycling technology, product development, and materials usage. Exhibitors will display new recyclable products, goods made from recycled content, innovative education and communication methods, materials that promote more effective recycling, recycling and manufacturing research, and new technologies that are advancing recycling today and into the future. SWANA will be an exhibitor at this virtual event and we hope you can "stop by" the booth. The Innovation Fair is free, online, and open to the public.

On Tuesday, November 17 EPA will host the America Recycles: Summit and provide an overview of its draft *National Recycling Strategy*, along with a facilitated discussion on advancing the state of the nation's recycling. The Summit will also be where EPA announces the first-ever voluntary National Recycling Goals. These metrics and their associated national recycling goals will represent the first time that the federal government has set an objective for recycling at a nationwide level. They will serve as

likely to influence how recycling is measured at the state
rticipating in the Summit discussion and we invite you to

ling is the lack of domestic processing infrastructure, forcing
g more restrictive. The need for more domestic capacity
national trade becomes more limited. First, China has
all "solid waste" imports by the end of 2020 as part of its
rictions on plastic and mixed paper recycling imports that
jor partner in the international trade of other materials.
orted 31% of all U.S. recovered fiber exports. However,
out movement of many recyclables to China in anticipation

er challenges starting in 2021 as the result of an
creases oversight and restrictions on the trade of plastic
ement is signed by 187 countries, but the United States is
es party countries to cease trade of certain plastic scrap
e U.S. will be unable to trade plastic scrap without setting
ited States are currently engaged in developing such an
VANA is working with both countries on this issue.

me necessary after the Organization for Economic
and the United States belong, failed to come to an
non post-consumer plastic shipments among members in
ement would have helped the United States as a non-party
ntinue trade with other members uninterrupted. Instead,
ents, potentially creating additional confusion and cost to

United States and to reduce reliance on single-use plastics
ew challenges to international trade of the material. The
of legislation that would address domestic infrastructure
enate in January 2020 and passed the US House of
been returned to the Senate for consideration due to
at bill provides $55 million annually to states for five years
anagement systems and recycling programs. An additional
trash-free water grants for local governments, tribes, and
is legislation, along with the RECOVER Act introduced in the
e Senate that similarly provide funding for infrastructure

at has been introduced, the Break Free from Plastic
behind the bill, Sen. Tom Udall and Rep. Alan Lowenthal,
es to use the legislation as a blueprint for their own
sit programs, banning single-use plastic products, setting
extended producer responsibility (EPR) programs. It is
hether at the federal or state level, includes the input of the

NA is happy to speak with anyone in your
als such as these would affect community

ryone due to the COVID-19 pandemic. It
But through it all, it remains clear that
ncerns lead to a revaluation of priorities, it
enefits of recycling in our communities.

d, SWANA takes seriously its role to work
advocacy and research available. Please let
estions, please feel free to contact me at

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Responses to National Sword (2017-2020)

As recovered material shifts from foreign to domestic markets:

- Some local governments are cutting back on curbside collection
- Huge focus on reducing **contamination**
  - Some progress is being made – WM reported in-bound contamination has declined from 24 to 18%
- Recycling contracts being renegotiated
- Chemical/Advanced recycling & PTF
- Many MRFs investing in new equipment – robots/AI
- More collaboration upstream and downstream
  - What do buyers of recycled material want?
  - Lots of companies announcing recycled content “goals” for 2025 and 2030 – creates demand

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Recycling

SWANA believes that all stakeholders need to work together to preserve and expand recycling in the United States and Canada

The patchwork system requires federal assistance – resources/labeling/policy

Voluntary measures/goals are unlikely to be successful by themselves

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Brands need to do more to help recycling

For decades, many consumer-facing companies externalized the cost of disposal of both products and containers on local governments and Americans

SWANA agrees:

Innovative, transformative interventions are needed to improve the performance of the system and create critical change (CBA Recycling Policy Platform)

However, relying exclusively on "market-based" solutions is unlikely to be successful

- Brands are concerned about EPR in states

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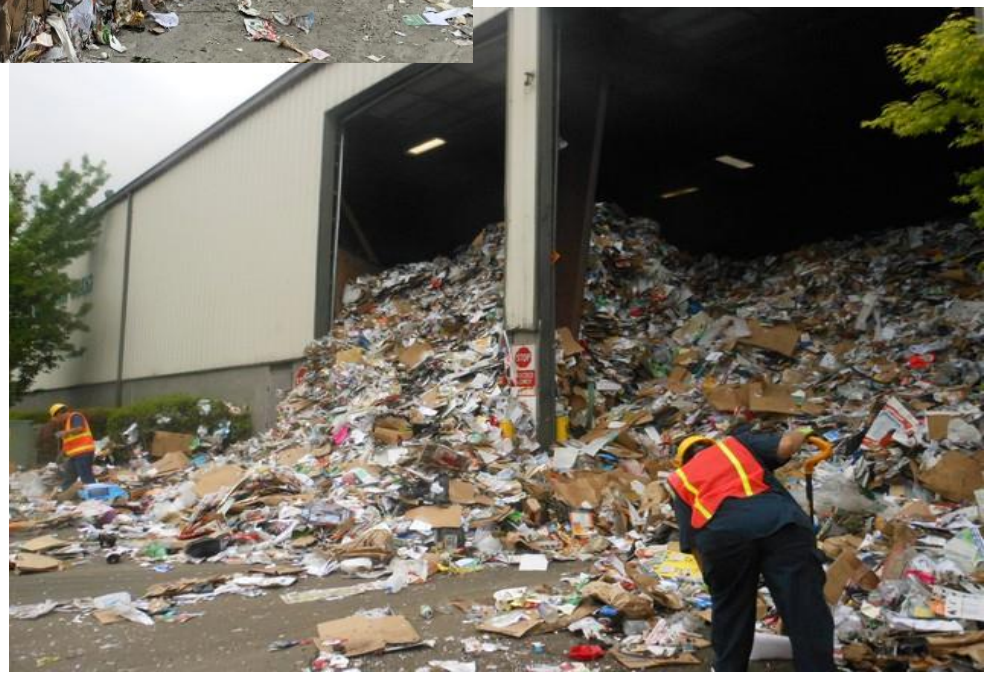
We Do Not Want to See This Again



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MRF Summit: November 18-19

SWANA is co-hosting a virtual MRF Summit on Nov 18-19 with ISRI

- Yes, same week as EPA's America Recycles events

- EPA Asst Admin Peter Wright/Hill staff on policy
- Improving MRF Efficiency & Productivity Through Technology
- Cutting Contamination at Curbside and in the MRF
- Recycled Commodities and Demand Innovations
- Improving Safety in the MRF
- What's Coming in 2021 – New Challenges
  - China has announced no more imports
  - Basel Amendment re plastic waste

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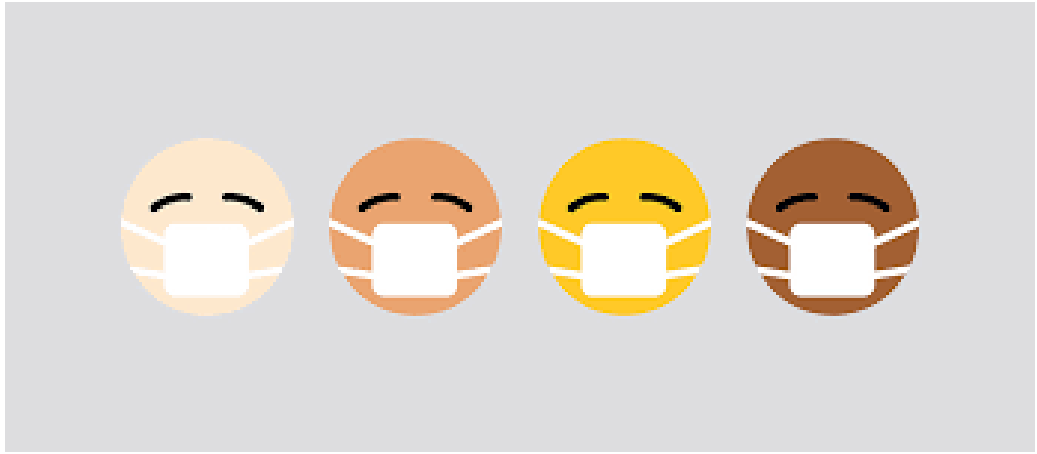
SWANA was asked by FEMA to distribute facial coverings to the waste and recycling industry

Free Facial Coverings

We took orders on our website and more than 2 million masks have been delivered to companies and local governments in all 50 states and beyond



THANK YOU

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