State Actions to Address Recycling Market Changes

ASTSWMO’s Sustainable Materials Management Task Force
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◆ Angela Vincent ◆ Adam Schlachter

NEWMOA / NERC / ASTSWMO WEBINAR
July 21, 2020
ASTSWMO’s Mission:
• Enhance and promote effective programs to affect relevant national policies for waste and materials management, environmentally sustainable practices, and environmental restoration.

Sustainable Materials Management (SMM) Task Force Mission:
• Provide leadership and promote actions that reduce waste, conserve resources, prevent pollution, and foster sustainability through identifying recycling opportunities, partnerships and educational programs.

Task Force Openings: Region 6
COVID-19 Resources

• Resources by Organization, State, National, and Industry: http://astswmo.org/covid-19-resources/
China’s National Sword & Global Import Restrictions on Recyclable Material

- **February 2013:** China’s Green Fence Launched
- **February 2017:** China’s National Sword Announced
- **March 2018:** .5% Contamination Limit Takes Effect
- **2019:** Malaysia, Indonesia, Cambodia & other countries sending scrap material back to countries of origin
- **April 2019:** Vietnam Announces Plan to Ban Plastic Imports in 2025
- **January 2021:** Plastic waste added to Basel Convention, requiring prior consent
State Actions to Address Recycling
Market Changes

• **Goal:** provide a clearinghouse of state and local actions in response to China’s National Sword Policy and changes in other international recycling markets

• **Purpose:** To provide examples and case studies to help state programs navigate the ever-changing recycling landscape.
What’s in it?

What did we ask about?

- Regulatory
- Compliance
- Program Changes
- Research
- Stakeholder work
- Outreach
- Market Development
- Fees and Costs

Tracked actions by:

- State
- Locals

How is it organized?

- By state
- By region
- Notes by State
- Notes by action
- Maps
- Contacts

Matrix Link:
astswmo.org/state-actions-to-address-recycling-market-changes/
## Compliance Issues

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Compliance Issues in Region V

- Additional education
- Local government cart tagging
- Waste hauler cart tagging
- Fines
- Formal enforcement
Massachusetts Recycle IQ Kit
http://www.recyclesmartma.org

- Provides a combination of grant funding, outreach tools and technical assistance.
- Grant recipients, that focus on contamination, are encouraged to use a cart tagging protocol.
- As part of the grant requirements, the tagging statistics must be collected for at least 8 weeks.
- The goal is to see a reduction in ‘tagged carts’ from Week 1 to Week 8.
- Over the last 2 years, participating grantees have seen contamination reductions ranging from -21% up to -86%
- 25 municipalities have taken part in the grant project and many more municipalities use the Recycle IQ Kit methodology.
- MRFs servicing the communities that have successfully reduced contamination have acknowledged the successful results.
- Currently 19,000 followers on Facebook that like and share posts.
- Over 3,000 subscribers to the program’s monthly newsletter
## Research Efforts

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<td>Governance &amp; Funding Models</td>
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<td>Other Research</td>
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Modernizing Oregon’s Recycling System

Researching Recommendations for 2021 Session

- Infrastructure and Materials: Collection, sorting, processing methods & facilities
- Legal and Relational frameworks: Including EPR

Examine and make recommendations for modernizing recycling system in Oregon, in order to:

- Optimize the environmental benefits of managing materials using a lifecycle perspective
- Create a recovery system that is strong and resilient to change
- Restore and maintain public trust in the system through education and engagement
New York State Research Partnership

MOUs with state universities to research:

- Contamination assessment
- Markets assessments
- Alternatives to plastics, fibers
- Alternatives processing of fibers
- Behavioral science, outreach and education related to recycling and waste reduction
- And more….
### Outreach & Education

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<td>State Campaigns on Contamination</td>
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<td>Private Campaigns on Contamination</td>
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<td>Outreach to Local Governments</td>
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Recycling Campaigns

- Similarities amongst locales
- Customized education materials
  - City/County/State specific
    - e.g., Recycle Right Nashville
- Social media toolkits
  - NC: social media influencer
New Jersey RecycleCoach App initiative

NJ has 562 municipalities and 21 Counties. In some cases there is program variability between different municipal programs within single counties. In order to help bring some parity to messaging and help contamination, NJDEP licensed the RecycleCoach app for all Counties/Cities. The focus is on a “what to recycle” guide and an “is it recyclable here” guide. RecycleCoach has other features such as, scheduling and hauling information, which participants can also use.

- Currently in year 2 of a 3 year initial contract.
- As of June 2020, 258 municipalities and 19 Counties representing 56% of the State are actively participating.
- The app was downloaded over 14,000 times during Q2 2020
- There are approximately 1.6 million interactions monthly within the app.

- [https://www.nj.gov/dep/dshw/rc/index.html](https://www.nj.gov/dep/dshw/rc/index.html)
- Erin Jensen, Contact: erin.jensen@dep.nj.gov
### RECYCLING PROGRAM CHANGES

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<td><strong>Recyclables Disposed of</strong></td>
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<td>17</td>
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<td><strong>Changes from Single to Dual Stream Collection</strong></td>
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<td><strong>Cart Tagging</strong></td>
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<td><strong>Recyclable Materials BMPs created</strong></td>
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Program Changes in the Midwest

Increased fees to residents
Materials excluded from curbside collections
Private and public drop-off sites limited or shuttered
Industry innovation to address contamination

Keep Northern Illinois Beautiful to change recycling program

ROCKFORD — Keep Northern Illinois Beautiful recently announced changes to its recycling program.

China stopped accepting recyclables Jan. 1, 2018. As a result of this ban, KNIB is now being charged a high rate to send recycled materials to the recycler. Because of this, KNIB will close its Roscoe Recycling Center, 13125 N. Second St., as of April 27.
• Program Changes:
  • 2 month dual stream pilot
  • Separate bins for paper & containers; alternate p/u
  • Adopted new dual stream program in August 2019

• Outcomes:
  • $80/ton to $17/ton for recyclables
  • More recyclable material/less residuals
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<td>Disposal Fee Increases</td>
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Impacts of Cost Increases:

Throughout the US, the recycling industry is adjusting to the financial implications of National Sword and Green Fence. Many of the changes brought about have had short and longer term financial implications for recycling programs. The major areas costs are changing include:

- MRF processing costs have been implemented or increased and rebates have been reduced.
- Contamination charges are also higher than they have been in the past.
- Many programs are maintaining service at these higher costs (e.g. no changes to service or materials).
- In areas were markets collapsed there have been adjustments including removing materials, changing service or eliminating programs due to costs.
- Contracts are being adjusted and renegotiated to address the increases in cost or changes in service, materials, etc.
Colorado Recycling Grants Program

- CO implemented a new fee at disposal facilities which started this year.
- The Front Range Waste Diversion (FRWD) will fund a grant program directed at those counties considered the “Front Range.”
- This fee starts out at $0.15/cy and will go up to $0.60/cy over the next four (4) years.
- This complements the current Recycling Resources Economic Opportunity (RREO) grant which collects $0.14/cy at disposal facilities to fund Statewide grant opportunities.
- Each of these grant programs is managed by a Board that determines funding priorities and awards the grants.
- [https://www.colorado.gov/pacific/cdphe/recycling-grants-and-rebates](https://www.colorado.gov/pacific/cdphe/recycling-grants-and-rebates)
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<td>Rules Updated</td>
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<td>Bills Introduced</td>
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Washington: Sustainable Recycling Act of 2019

Recycling Development Center
• Research and market development for recycled commodities and products
• 14 member public/private advisory board; Contract with Commerce Dept.

Plastic Packaging Study
• Research amounts and management of plastic packaging, options for reduction, and increased recycling, including EPR.

Contamination Reduction Outreach Plans
• State and Local governments plans
• Identify and take actions to reduce contamination; outreach to ‘recycle right’
HB 73: Recycling Contamination

- Passed House; expected to pass Senate and be signed into law *First of its kind*...
- Requires recycling contamination to be addressed in contracts between municipalities, haulers & MRFs
- Haulers not required to transport contaminated materials
- MRFs not required to process contaminated materials
# Market Involvement

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<tr>
<th>Survey Response/Action</th>
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<tbody>
<tr>
<td>MARKET DEVELOPMENT</td>
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<td>Incentives for Recycling Businesses</td>
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<td>Secondary Market Research/Studies</td>
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<td>Market Development Bills &amp; Laws</td>
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<td>Other Market Development Activities</td>
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South Carolina: Recycling Markets

- Recycling Market Development Advisory Council:
  - Provides matchmaking support
  - Consultation
  - Existing and emerging markets
  - Tracks economic impact of industry

Why South Carolina is Just Right for Paper Recycling

<table>
<thead>
<tr>
<th>Statistic</th>
<th>Value</th>
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<tbody>
<tr>
<td>Recycled content paper mills</td>
<td>5</td>
</tr>
<tr>
<td>Tons of cardboard recycled annually in SC</td>
<td>1,261,000</td>
</tr>
<tr>
<td>Workers in paper recycling value chain</td>
<td>3,000</td>
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</table>

SC's Top 5 Recycled Paper Export Countries in 2018

<table>
<thead>
<tr>
<th>Country</th>
<th>Value</th>
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<tbody>
<tr>
<td>South Korea</td>
<td>$25,000,000</td>
</tr>
<tr>
<td>Italy</td>
<td>$26,000,000</td>
</tr>
<tr>
<td>India</td>
<td>$27,000,000</td>
</tr>
<tr>
<td>Japan</td>
<td>$46,000,000</td>
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<tr>
<td>China</td>
<td>$75,000,000</td>
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Market Development Innovation in the Midwest

- $15 million annual budget for market development grants
- Focus areas include:
  - Research and testing
  - Marketing
  - Analysis and Data Collection
  - Sorting and processing equipment
  - Recycled content product commercialization
  - Targeted partnership projects
- Awards range from $50,000 to $400,000
## Stakeholder Work

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Illinois Recycling Contamination Task Force

- 25 member working group
- Comprised of state, federal, and local government; waste industry; recycling industry; the environmental community
- Developed consistent multi-sector messaging and outreach campaign
Stakeholder Work

- New groups formed
- Existing groups changed focus
  - Markets
  - Reducing Contamination
  - Outreach Campaigns
  - Best Management Practices
  - Resetting Recycling
Task Force Contacts

Nathan Arruda, RI-Region 1
Molly Baker, NY-Region 2
Adam Schlachter, DE-Region 3
Jeremy Hooper, TN-Region 4
James Jennings, IL-Region 5
Amber Edwards, OK-Region 6
Jennifer Wright, IA-Region 7
Craig McOmie, WY-Region 8
Angela Vincent, CA-Region 9
Janine Bogar, WA-Region 10
Kerry Callahan, ASTSWMO

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Thank You

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