

Recycling In America

State of Recycling
Installment Two:
The Evolving Ton

October 1, 2026



Our Plan for Today

Welcome!

Introduction to “The Evolving Ton” + Data

**Panel Discussion: Responding to a
Changing Material Stream**

Closing: Key Takeaways and Actions



The Recycling Partnership is subject to various antitrust rules

The essential requirement of such rules is that in any Recycling Partnership meeting or event, whether in person or by conference call, Recycling Partnership members and attendees don't discuss the ways in which they compete in the marketplace.

That applies particularly to prices and factors that affect prices, but also to such subjects as:

- **Disaggregated costs**
- **Customers**
- **Products offered**
- **Strategic or business plans**
- **Projections**

State of Recycling Installment Two: The Evolving Ton

Webinar Host + Moderator



Cody Marshall

Chief Programs Officer
The Recycling Partnership

State of Recycling Installment Two: The Evolving Ton

Speakers



Rob Taylor

Executive Director, Data & Analytics
The Recycling Partnership



Scott Mouw

Senior Advisor
The Recycling Partnership



Scott Breen

President
Can Manufacturers Institute



Joaquin Mariel

*President, West MRF
Operations*
Circular Services

State of Recycling Installment Two: The Evolving Ton

Q&A Support

***No chat available - please submit questions through the Q&A feature**



Rob Taylor

*Executive
Director, Data
& Analytics*



**Jessica
Vreeswijk**

*Director, Circular
Economy Data*



**Brittany
LaValley**

*Sr. Vice President,
Impact Strategy and
Management*



The Recycling Partnership is the U.S. nonprofit solving recycling's toughest challenges, together.

State of Recycling

The Evolving Ton: Residential Generation Data 2020-2026



Reminder: What must be true for the U.S. recycling system to really work?



- 1 Packaging:** 100% of packaging needs to be recyclable.
- 2 Access:** 100% of households need access to recycling from their home.
- 3 Engagement:** Residents need to fully engage in recycling. 90% of households are confidently placing 80% of accepted recyclables into collection.
- 4 Processing:** Recycling facilities need to effectively process 95% of the material.
- 5 End Markets: Old Stuff → New Stuff** Recycling facilities need sufficient end markets.

The Evolving Ton

The changing mix of residentially generated paper and packaging materials. As packaging and printed paper formats, materials, and weights change, so does what the recycling system must react to and collect, sort, process, and ultimately turn into new materials and products.



Residential Generation

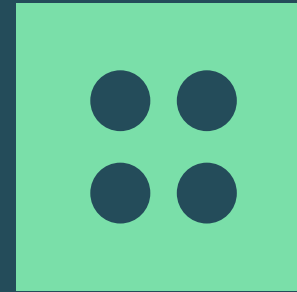
Packaging and printed paper that households have been used and then discarded into the trash or recycling stream



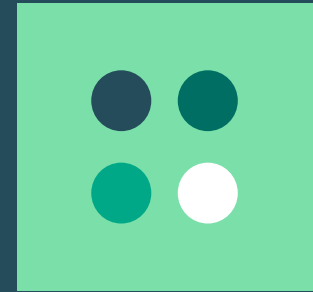
Weight Alone Doesn't Tell the Full Story

Residential recycling stream has **grown more complex** in 3 important ways:

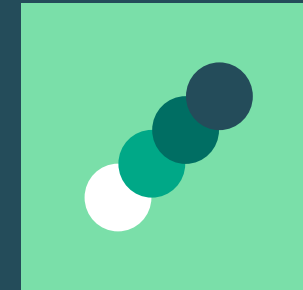
- **Volume** – Lighter packaging = more individual units with less total weight
- **Variety** – Increasing distinct packaging forms (ex. Non-bottle plastics)
- **Velocity** – Harder to measure, but consistent with faster consumption cycles



VOLUME HAS
SHIFTED



VARIETY HAS
EXPANDED



VELOCITY IS A
POTENTIAL
EMERGING TREND

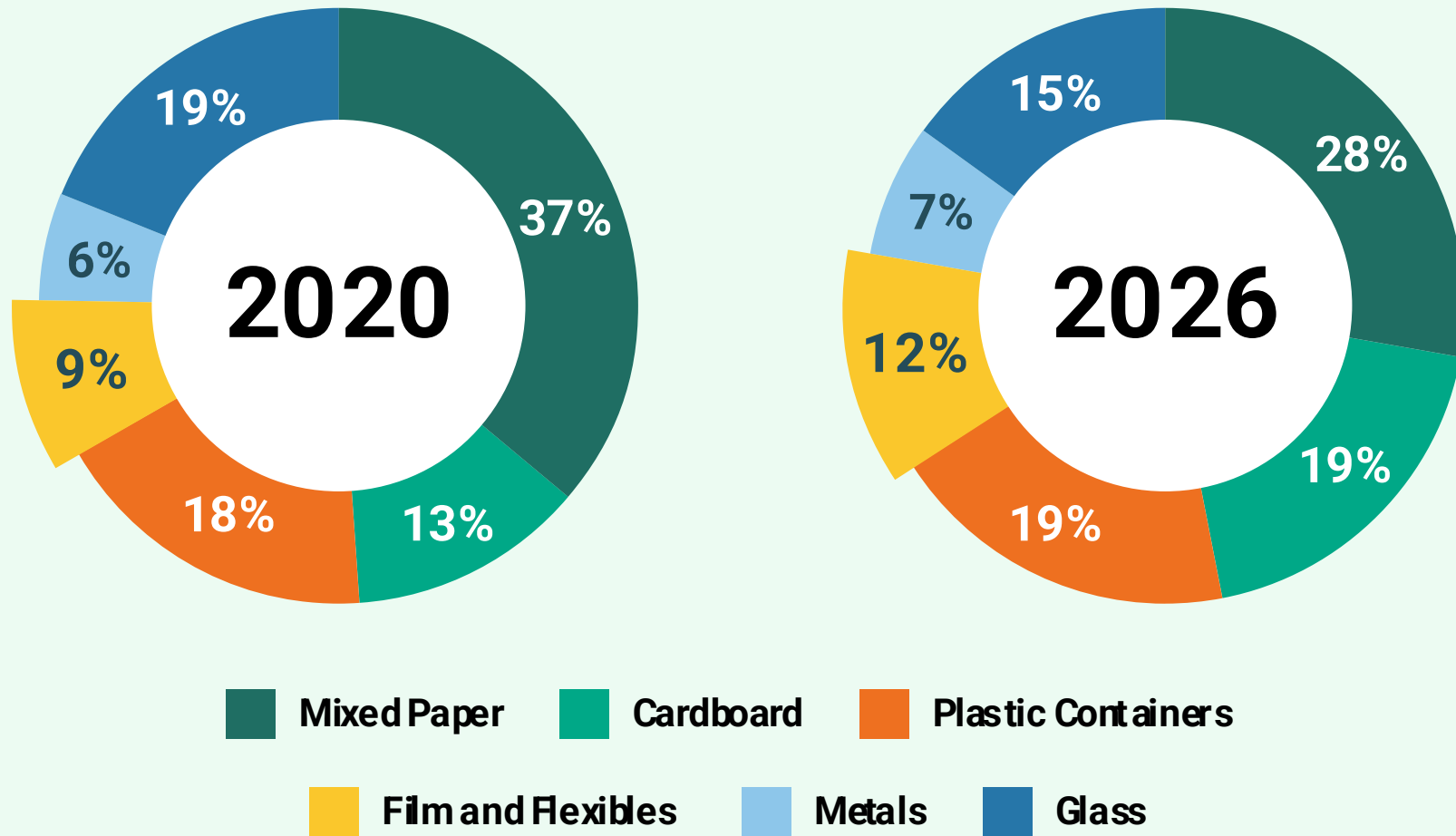
2026 State of Recycling Report

The Evolving Ton

U.S. households generate roughly 705 pounds of traditionally collected recyclable materials, plus film and flexibles each year, but the mix of that material is changing.



How is the Material Mix Changing?



What Has Changed?

32% ↗ Cardboard

Corrugated cardboard is up 32%, driven by e-commerce growth that accelerated during the pandemic and has continued.

61% ↗ Cartons

Aseptics and gabletop cartons at 9.3 pounds per household have grown 61%, though they remain a small percentage of the overall packaging stream.

48% ↗ Non-bottle PET

Non-bottle PET has grown 48%, non-bottle HDPE has grown 38%, and polypropylene has grown 47%, reflecting a broader shift toward more recyclable resin types in non-bottle packaging.

38% ↗ Non-bottle HDPE

47% ↗ Polypropylene

18% ↗ Aluminum cans

Aluminum cans grew 18%, and aluminum foil and trays also grew 44%.

44% ↗ Aluminum foil and trays

15% ↗ Film and flexibles

Film and flexibles grew 15%, continuing an upward trend in that category.

More Households Generating A Lighter More Complex Mix

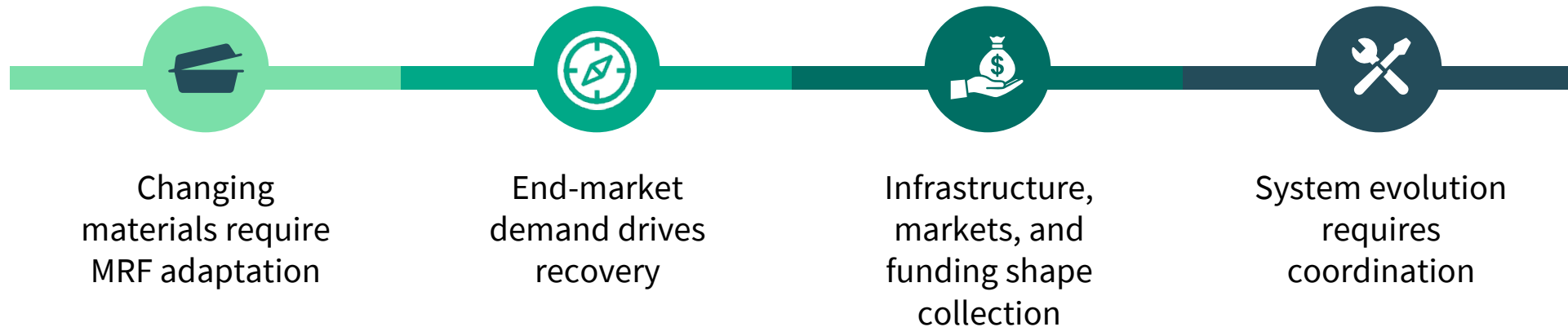
8.5M
more
households



7M
fewer tons of mixed
paper and glass



Downstream Implications Impacting Upstream Decision Making



State of Residential Recycling 2: The Evolving Ton

Panelists



Scott Mouw

Senior Advisor
The Recycling Partnership



Scott Breen

President
Can Manufacturers Institute



Joaquin Mariel

*President, West MRF
Operations*
Circular Services

What If We Don't Meet This Moment?

The stream continues to evolve.

Recovery falls behind.

Costs and confusion grow.



But What If We Get This Right?

Better data helps the system adapt as the packaging and printed paper coming into households changes.



BETTER DATA



BETTER DESIGN



SMARTER
INVESTMENT



MORE MATERIAL
RECOVERY



Key Takeaways



The material coming out of U.S. households is changing.

The stream is becoming lighter, more varied, and more complex, changing the opportunity for recovery.



What comes out of the home shapes what comes next.

The materials entering and leaving homes are changing faster than the systems and supply chains are evolving.



Recovering more material is an economic and supply chain opportunity. More recovery means more feedstock for U.S. manufacturing, stronger domestic supply chains, and more materials kept in productive use.

Get in Touch:

The Recycling Partnership

✉ info@recyclingpartnership.org

🌐 recyclingpartnership.org



Scan to Learn More



**The Recycling
Partnership**

The Recycling Partnership is the U.S. nonprofit solving recycling's toughest challenges, together.

Appendix



**PACKAGING AND PRINTED PAPER
COMING INTO U.S. HOUSEHOLDS IS
EVOLVING FASTER THAN THE
SYSTEMS DESIGNED TO RECOVER
IT. CLOSING THAT GAP REQUIRES
SUSTAINED INVESTMENT
ACROSS THE RESIDENTIAL
RECYCLING SYSTEM.**



2020 - 2026

Modeled Impact of Generation on the Inbound MRF Stream

This assumes a scenario in which all the listed materials are accepted at the MRF and in supporting collection programs, with inbound contamination at 17%.

