

Recycling In America

From Crisis to Correction:
How Industry Can Stabilize
PET Recycling

March 26, 2026

Our Plan for Today

Welcome! What's on your mind?

Setting the Stage: How did we get here?

**Perspective from the PET Value Chain:
Guest speakers**

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**

From Crisis to Correction: How Industry Can Stabilize PET Recycling

Speakers



Adam Gendell

Director, Material Systems
The Recycling Partnership



Kate Bailey

Chief Policy Officer
APR



Brent Bell

Vice President, Recycling
WM



Pete Keller

Vice President, Recycling and Sustainability
Republic Services

From Crisis to Correction: How Industry Can Stabilize PET Recycling

Webinar Host



Keefe Harrison

CEO
The Recycling Partnership

From Crisis to Correction: How Industry Can Stabilize PET Recycling

Q&A Support



Chris Wirth

*Chief Market
Innovation Officer*



Scott Mouw

Senior Advisor



Brittany LaValley

*Sr. Vice President,
Impact Strategy and
Management*



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

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



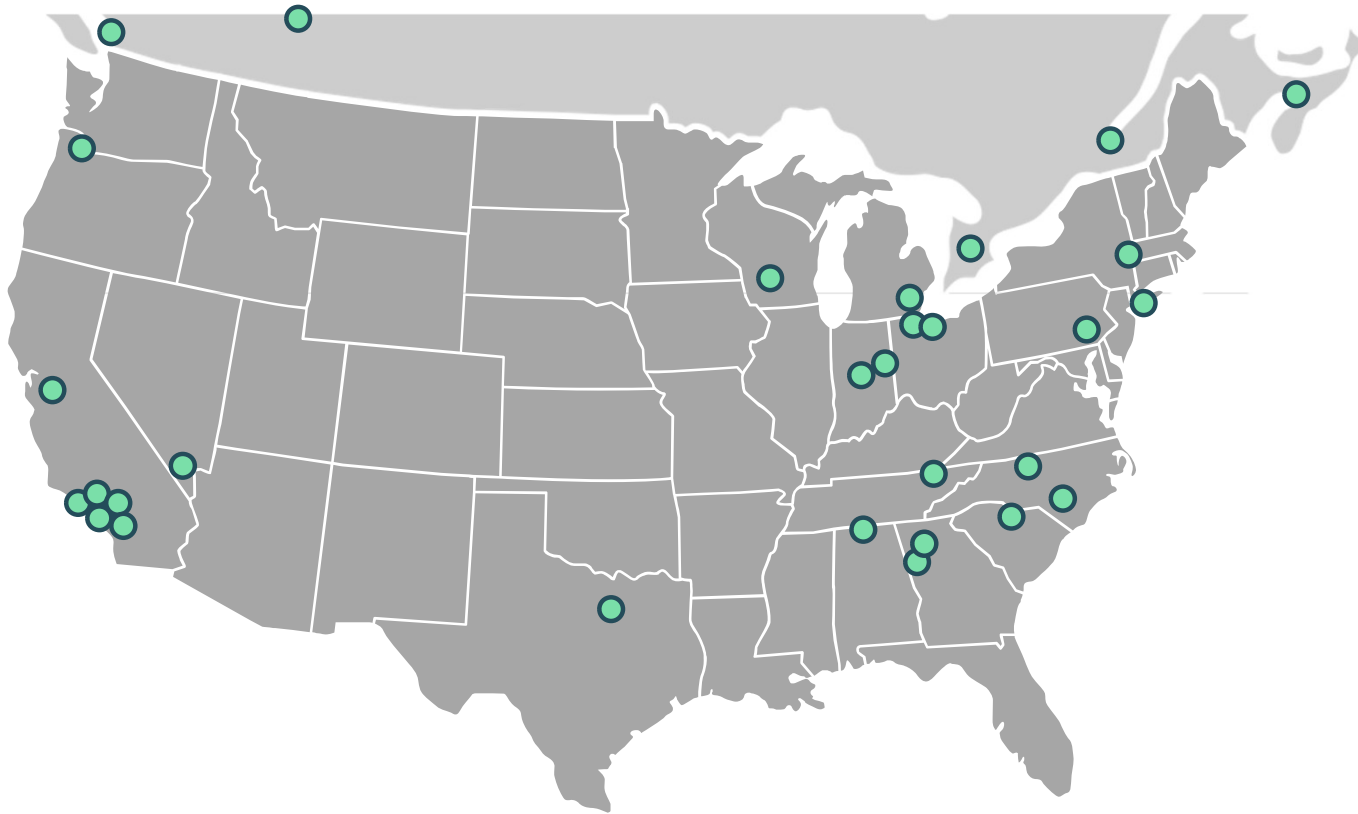
- 1 Design for Recycling:** All packaging needs to be designed for recyclability.
- 2 Ability to Recycle:** All households need access to recycling in their home.
- 3 Public Participation:** Residents need to fully engage in recycling.
- 4 Recycling Infrastructure:** Recycling facilities need to effectively process the material.
- 5 Old Stuff → New Stuff:** Recycling facilities need sufficient end markets.

From Crisis to
Correction:

How Industry Can Stabilize PET Recycling



Where are the Reclaimers for PET Recycling in the U.S.?



7 out of 30 have closed in the last **12 months**

This represents **over 25%** of PET reclamation capacity

1/3 of the curbside-collected PET has been **lost**

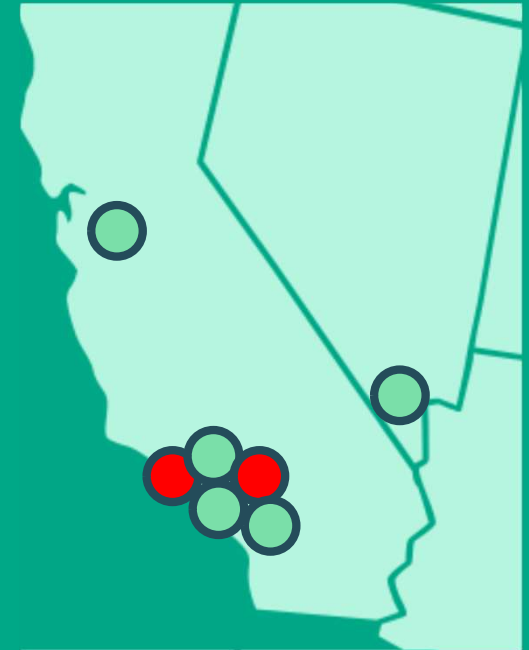
PET Reclaimer Capacity in California is at a breaking point

Capacity in California is **down**

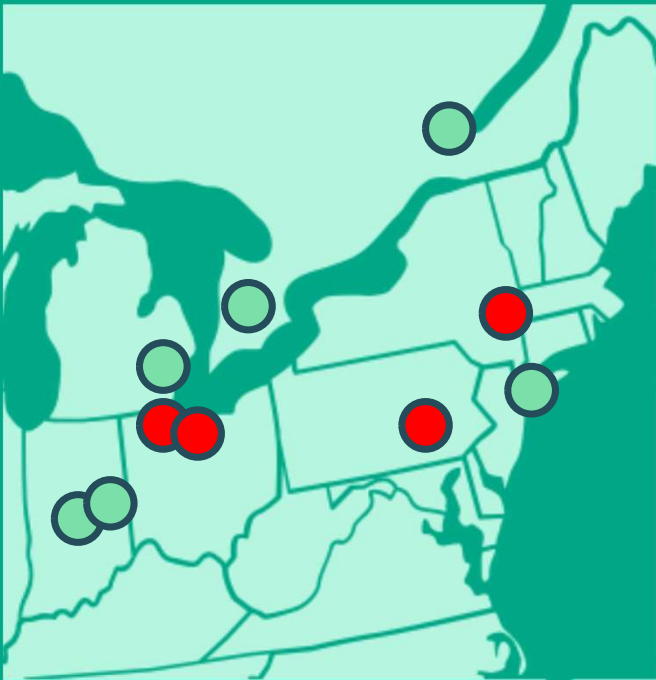
30%

Of the **2 facilities** that handle Californian curbside PET, only

1 remains



PET Reclaimer Capacity in the Northeast is also down



Capacity is down

40%

across this region

2/3

of capacity to handle
curbside PET is lost

Reality Check:

We Must Solve the Broken Link in PET Recycling

There are solutions the industry can take together – quickly – to restore the system



Without new capacity, recyclers must consider **exporting** PET – and may consider **landfilling** if conditions worsen.



Improved uptake of **rPET in packaging** can **resolve the crisis** and **reinvigorate the system**.



Swift action is needed to advance **policy** and **voluntary corporate responsibility** measures.

From Crisis to Correction: How Industry Can Stabilize PET Recycling

Speakers



Adam Gendell

Director, Material Systems
The Recycling Partnership



Kate Bailey

Chief Policy Officer
APR



Brent Bell

Vice President, Recycling
WM



Pete Keller

Vice President, Recycling and Sustainability
Republic Services

Key Takeaways



What's happening with PET isn't a failure of recycling – it's a failure of demand. Fixing the broken link can help restore the system.



PET is the anchor of both economics and public trust in recycling. It's critical to protect it to ensure system resiliency.



Clear commitments to improve PCR uptake will help restore PET recycling. Closing the loop on domestic PCR can rebalance the system.



Swift action is needed today to advance **policy** and **voluntary corporate responsibility** measures.

Get in Touch:

The Recycling Partnership

✉ info@recyclingpartnership.org

🌐 recyclingpartnership.org



Scan to Learn More



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

Appendix