



# Recycling In America

What's Working, What's Not,  
and What We Do About It

May 8, 2025

# Our Plan for Today

**Welcome! What's on your mind?**

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**Setting the Stage: What do the data say?**

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**Perspective from the Field: Guest speakers**

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**Deeper Dive: Your questions & experience**



## End Markets: If Recyclables Have Nowhere To Go, Are They Really Recyclables?

### Speakers



**Scott Breen**

*Senior Vice President  
of Sustainability, Can  
Manufacturers Institute (CMI)*



**Miriam Holsinger**

*Co-President,  
Eureka Recycling*



**Scott Saunders**

*General Manager, KW  
Plastics Recycling Division*

End Markets: If Recyclables Have Nowhere To Go, Are They Really Recyclables?

## Chat/Q&A Support



**Craig Wittig**

*Vice President,  
Material Systems*



**Danielle Easdale**

*Director,  
Material Systems*



**Scott Mouw**

*Senior Advisor,  
Strategy and Research*



**Katherine Huded**

*Executive Director,  
Material Systems*

# 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.



## Our mission is to build a better U.S. recycling system.

The Recycling Partnership is a purpose-driven NGO.

We are a team of experts, practitioners, and thought leaders with the real-world experience needed to overhaul the U.S. recycling system through on the ground action.

# The U.S. recycling system needs all of us...



# End Markets



# Requirements of an Effective Recycling System

There is opportunity to improve every part of the residential recycling system.



	Current Level	Target Level
<b>N/a</b>	More information needed on packaging design – to be provided with policy .	100%
<b>C</b>	Access to Recycling <b>73%</b>	100%
<b>F</b>	Households Participating <b>43%</b>	90%
<b>B+</b>	Facilities Able to Process Recyclables <b>87%</b>	95%
<b>N/a</b>	More information needed on end market availability – to be provided with policy.	Sufficient End Markets

# What is an end market?

End markets directly use materials produced from the recycling process for input in material manufacturing to make new products.

EPA estimates that the U.S. recycling market currently includes approximately 1,000 end market facilities. Examples of end market facilities include glass container manufacturers, metal smelters, foundries, paper mills, etc.

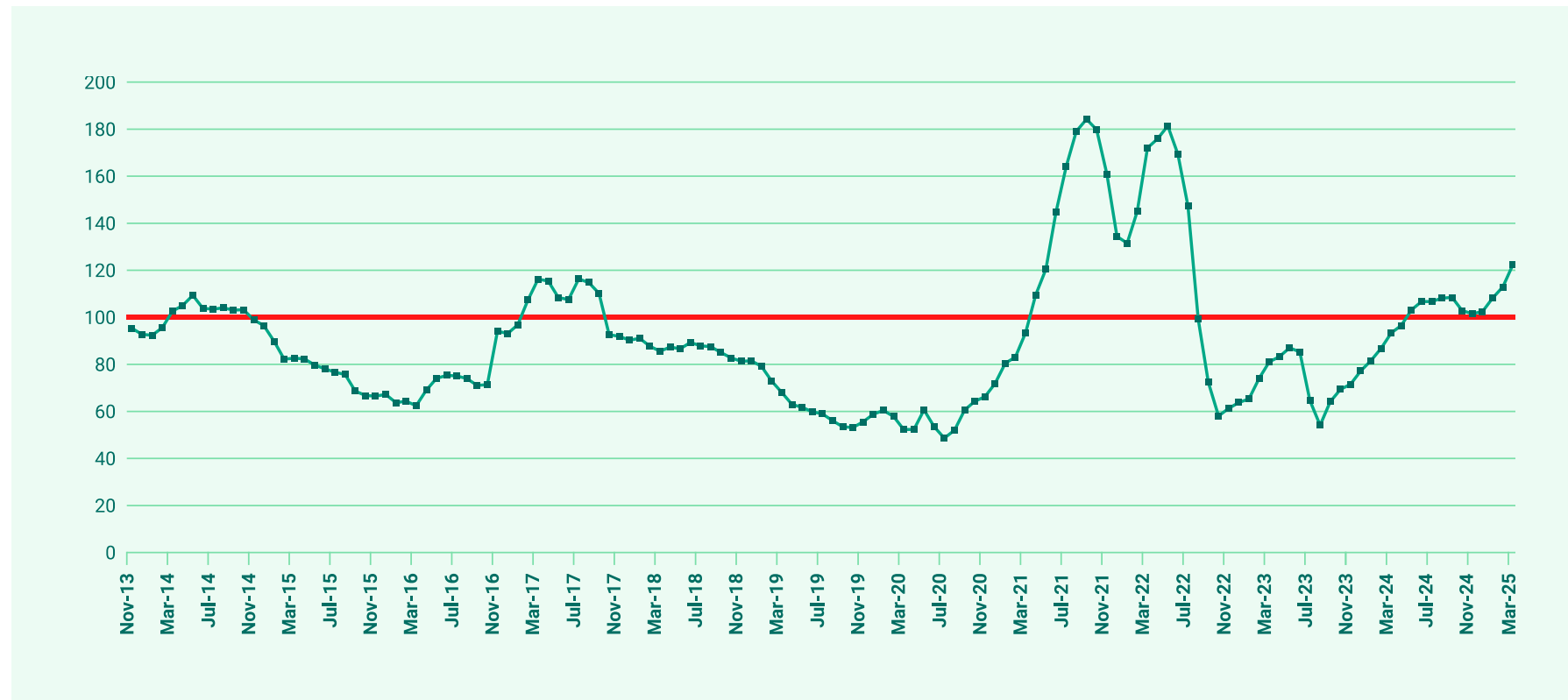
*An Assessment of the U.S. Recycling System: Financial Estimates to Modernize Material Recovery Infrastructure, EPA, August 2024*

**The need for sufficient end markets is a key aspect of recyclability.**

End markets play an important role in supporting the development and growth of residential recycling programs.

April 2017 – March 2025

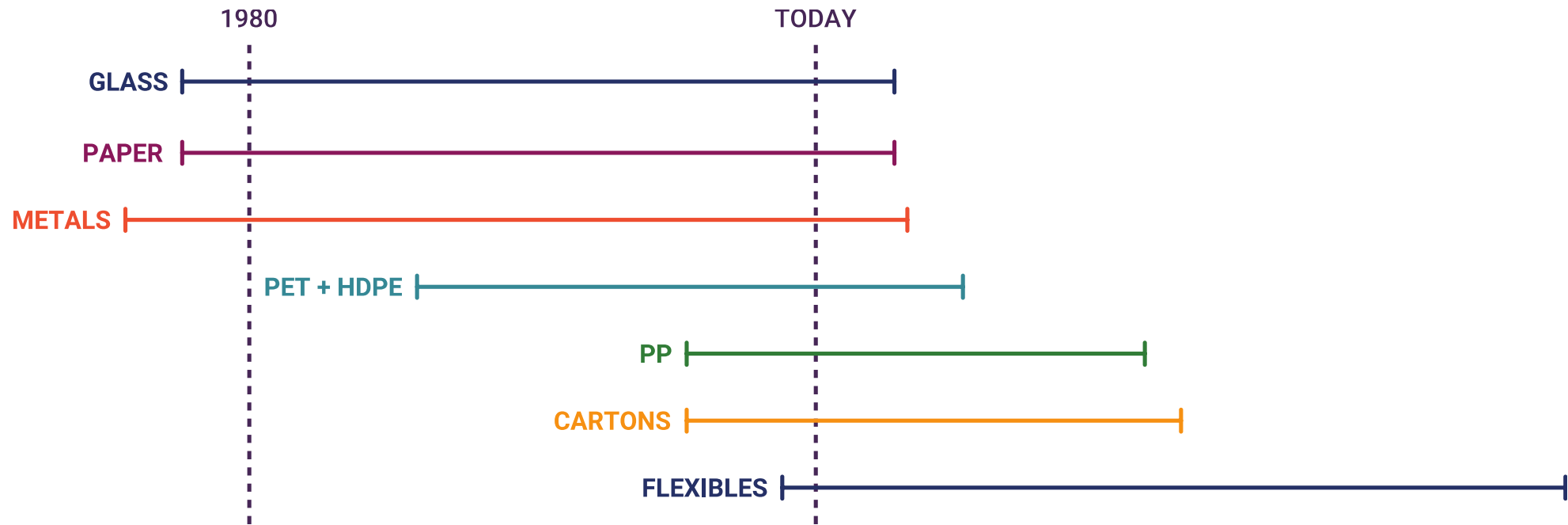
## Blended Materials Values for MRFs



MRFs face the challenge of low prices relative to processing costs as they sell their commodity bales to the market.

## Historical Context

# Investment in Recycling by Material Sector



Source: The Recycling Partnership, Paying it Forward Report, p. 12

## Factors Affecting Demand

# What influences end markets for recyclables?



- Policy – international, national, and subnational (e.g., Basel Convention, state EPR requirements, “Responsible End Market certifications)
- Broader economic and trade conditions (e.g., tariffs, Great Recession)
- Market prices for raw, virgin materials
- Material design and quality (e.g., design for recyclability, contaminants, chemicals of concern)
- Consumer trends (e.g., public opinion and demand)

# The Role of Voluntary Corporate Commitments

## Analysis: Undersupply of PCR is 'stifling' brand goals

October 9, 2024

By Colin Staub



## Big brands set to miss plastic sustainability targets

June 12, 2024 · As You Sow

New Report Ranks 225 Major Companies on Their Response to the Crisis of Plastic Packaging Pollution

Many major brands have pledged to use more recycled material in their packaging – in line with rising consumer expectations for sustainable packaging, and increasingly common policy requirements.

**The problem is that these commitments are voluntary and often fall short on delivering meaningful, consistent demand.**

# Defining Responsible End Markets (REMs)

U.S. EPR's introduction of new "Responsible End Market" (REM) requirements will significantly impact market conditions.

State Name	REM requirement?	Definition
California	Yes	REMs will be verified by the PRO
Colorado	Yes	REM means "a materials market in which the recycling of materials or the disposal of contaminants is conducted in a way that benefits the environment and minimizes risks to public health and worker health and safety."
Maine	Not explicitly	N/A
Minnesota	Yes	<p>"Responsible markets" means a market that:</p> <ul style="list-style-type: none"><li>• Reuses, recycles, composts or otherwise recovers materials and disposes of contaminants in a manner that protects the environment and minimizes risks to public health and worker health and safety;</li><li>• Complies with all applicable laws;</li><li>• Possesses all requisite licensing and permits required;</li><li>• If the market operates in Minnesota, it must manage waste according to the waste management goal and priority order of waste management practices in the state;</li><li>• Minimizes adverse impacts to environmental justice areas.</li></ul>
Oregon	Yes	REM means "a materials market in which the recycling or recovery of materials or the disposal of contaminants is conducted in a way that benefits the environment and minimizes risks to public health and worker health and safety."

## Opportunities for Improvement

# How can we strengthen recycling end markets?



*To “win” at recycling, we need all 5 requirements of an effective recycling system. Demand often represents the “final” piece of the puzzle.*

### **Market development programs**

From SC’s Recycling Market Development Advisory Council to WA’s NextCycle, many programs connect state resources with private sector parties.

### **Recycled content mandates & procurement policy**

Through EPR or otherwise, many states have established minimum recycled content requirements for manufacturers to drive steady demand.

### **Recycling infrastructure tax credits and incentives**

Nationally and at the state level, economic incentives help spur private investment in recycling.

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To achieve the environmental and economic goals of recycling, we must strengthen recycling end markets.



# How?

## Companies

Advocate for smart, well-designed policy and invest to reach your recycled content goals today. For maximum impact, [join The Partnership](#).

## Communities

Utilize your local market development resources and purchasing power to help drive demand for recycled content.

## Policymakers

Support and advance smart, well-designed policy solutions including [EPR](#) and [a national recycling infrastructure investment tax credit](#).

# Mark Your Calendars

## May 2025

28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

May 15, 2025

### Part 4 – Recycling by Design

- Exploring definitions, policies, and the road ahead
- 2:00 – 3:00pm EST

May 22, 2025

### Part 5 – Policy

- Shaping the future of recycling
- 2:00 – 3:00pm EST

Get in Touch:

# The Recycling Partnership

✉ [info@recyclingpartnership.org](mailto:info@recyclingpartnership.org)

🌐 [recyclingpartnership.org](https://recyclingpartnership.org)



**The Recycling  
Partnership**

Building a Better Recycling System

We're a purpose-driven organization committed to building a better recycling system that delivers economic and environmental benefits for communities and the industry.