NATIONAL ACADEMIES OF SCIENCES, ENGINEERING & MEDICINE

Costs and Approaches for Municipal Solid Waste Recycling Programs

MSW Recycling Flow in the U.S.

Chaz Miller Washington, DC April 16, 2024

I AM FOCUSING ON WHAT GETS RECYCLED AT THE CURBSIDE & END USES FOR THOSE RAW MATERIALS

NOT GETTING INTO YARD OR FOOD WASTE

BUT FIRST, SOME CAVEATS

CAVEATS

MSW data is imperfect

Recycling data is imperfect & subject to methodology

 E.G., groups use statistics that promote their goals but are out of context or use faulty methodology

Product loss is inherent in recycling

EPA'S TOP DOWN APPROACH RELIES ON A MIX OF US DOC PRODUCT MANUFACTURING DATA, PRODUCT LIFE SPAN ESTIMATES & WASTE CHARACTERIZATION FOOD & YARD WASTE ESTIMATES EPA HAS THREE CATEGORIES OF MSW

- DURABLE (MORE THAN 3 YEARS OF USEFUL LIFE)
- NON-DURABLE (LESS THAN 3 YEARS OF USEFUL LIFE)
- PACKAGING (ASSUMED TO BE LESS THAN 3 YEARS OF USEFUL LIFE)
- EPA COVERS GENERATION, DISPOSAL & RECYCLED/COMPOSTED & MANAGED BY OTHER FOOD PATHWAYS
- CONSISTENT METHODOLOGY UNTIL 2018
- BEST USED FOR MATERIAL-SPECIFIC DATA &TRENDS
- EPA RECYCLING DATA USUALLY FROM INDUSTRY ASSOCIATIONS

THE BOTTOM UP APPROACH RELIES ON STATE MSW DISPOSAL DATA FOR DISPOSAL TONNAGES

- ASSUMES DEESCRIPTION OF MATERIALS WHEN ARRIVE AT TRANSFER STATION/DISPOSAL FACILITY ARE ACCURATE
- INEVITABLY INCLUDES CONSTRUCTION & DEMOLITION DEBRIS & OTHER NON-MSW DUE TO UNINENTIONAL OR DELIBERATE MISIDENTIFICATION

SEE:

- A REVIEW OF NATIONAL MUNICIPAL SOLID WASTE GENERATION ASSESSMENTS TONJES & GREENE – WASTE MANAGEMENT & RESEARCH 30(8)758-771
- VARIATION IN MUNICIPAL SOLID WASTE GENERATION & MANAGEMENT ACROSS TIME & SPACE FIRMANSYAH, ET AL – RESOURCES, CONSERVATION & RECYCLING 204 107472

WHAT ARE THESE & WHERE DO THEY GO?



MONTGOMERY COUNTY DEP

RECYCLABLES ARE SIMPLY RAW MATERIALS LOOKING FOR BUYERS

- UNIQUE RAW MATERIAL B/C SUPPLY IS MANDATED
- DEMAND MIGHT BE "MANDATED" UNDER MINIMUM CONTENT LAWS BUT PRICE <u>CAN'T</u> BE MANDATED

RECYCLABLES ARE BOUGHT NOT SOLD

BUYERS WANT

- CONSISTENT QUANTITY
- CONSISTENT QUALITY
- AT AN ACCEPTABLE PRICE
- LOOKING FOR THAT SWEET SPOT WHERE BUYERS & SELLERS ARE HAPPY & NO ONE IS STEALING THE RECYCLABLES

NOTE: RECYCLABLES CAN BE CIRCULAR BUT MANY MARKETS AREN'T AS THE SLIDES POINT OUT

 LOCAL GOVERNMENTS & MRFS ARE MORE INTERESTED IN REVENUE THAN MEETING CIRCULARITY CRITERIA

STEEL CANS



CHEMISTRY WORLD

STEEL



STEEL FABRICATION SERVICES

WHERE DO THEY GO?

STEEL CANS CAN BE MADE INTO ANY STEEL PRODUCT

- ALL YOU NEED TO SORT IS A MAGNET
- ELECTRIC ARC FURNACES, 70 PERCENT OF US STEEL PRODUCTION, RELY ON STEEL SCRAP OF ALL KINDS

STEEL RECYCLING RATE 2018 EPA DATA:

- CANS: 1,290 MT, 70.9%
- ALL PACKAGING: 1,630 MT, 73.8%
- NONDURABLES & DURABLES: NA
- TOTAL FERROUS: 6,360 MT, 33.1%

EPA DATA FOR 2018 (MOST RECENT):

- https://www.epa.gov/sites/default/files/2021-01/documents/2018_tables_and_figures_dec_2020_fnl_508.pdf
- ALL STEEL DATA, TABLE 7
- PACKAGING SPECIFIC DATA, TABLES 24 & 25

INDUSTRY RECYCLING DATA FOR 2019:

- STEEL CONTAINERS: 63.2% & OVERALL STEEL: 69%
- https://www.steel.org/wp-content/uploads/2021/08/AISI-and-SMA-Steel-Recycling-Rates-Report-Final-07-27-2021.pdf

ALUMINUM CANS



RECYCLING TODAY

ALUMINUM CANS



ALL AMERICAN 930 ALUMINUM FOUNDRY

WHERE DO THEY GO?

ALMOST AS EASY AS STEEL BUT ALUMINUM PRODUCTS ARE ALLOY SPECIFIC

- ALUMINUM CANS CAN ONLY BE USED TO MAKE ALUMINUM CANS.
- REQUIRES AN EDDY CURRENT SEPARATOR

ALUMINUM RECYCLING RATE 2018 EPA DATA:

- CANS: .670 MT, 50.4%
- PACKAGING: .670 MT, 34.9%
- NONDURABLES & DURABLES: NA
- TOTAL ALUMINUM: .670, 17.2%

EPA DATA FOR 2018 (MOST RECENT):

- https://www.epa.gov/sites/default/files/2021-01/documents/2018_tables_and_figures_dec_2020_fnl_508.pdf
- ALL ALUMINUM DATA, TABLE 7
- PACKAGING SPECIFIC DATA, TABLES 24 & 25

INDUSTRY DATA: 2022

 45.2% CONSUMER RECYCLING RATE (https://www.aluminum.org/sites/default/files/2023-09/EPW-Subcommittee-Testimony 092823.pdf)

GLASS BOTTLES



CAP GLASS

WHERE DO THEY GO?

GLASS BOTTLES HAVE DIFFERENT COLORS WHICH COMPLICATES MAKING THEM BACK INTO NEW BOTTLES

- BOTTLES FROM BEVERAGE CONTAINER DEPOSIT STATES & POSSIBLY FROM DUAL STREAM COLLECTION PROGRAMS CAN BE MADE INTO BOTTLES
- MIXED COLOR CULLET IS TURNED INTO FIBERGLASS OR A VARIETY OF AGGREGATE MARKETS.

GLASS RECYCLING RATE EPA DATA: 2018

- BOTTLES & JARS: 3,060 MT, 31.3%
- DURABLES: NA
- TOTAL: 3,060 MT, 255

EPA DATA FOR 2018 (MOST RECENT):

- https://www.epa.gov/sites/default/files/2021-01/documents/2018_tables_and_figures_dec_2020_fnl_508.pdf
- ALL GLASS DATA, TABLE 6
- PACKAGING SPECIFIC DATA, TABLES 24 & 25

GLASS INDUSTRY DATA: 2022

- GLASS BOTTLES & JARS: 31.3%
- https://web-assets.bcg.com/56/7c/6670ab5741579ab31767b5a10bc1/gpi-brochure-v19-bcg.pdf

GLASS CULLET



CAP GLASS

MIXED UNSORTABLE BROKEN GLASS – CULLET – IS TURNED INTO FIBERGLASS OR AGGREGATE FOR A VARIETY OF USES

- FIBERGLASS INDUSTRY AN AGGRESSIVE USER DUE TO IMPROVED PROCESSING TECHNOLOGIES THAT ELIMINATE CERAMICS FROM CULLET & NO COLOR REQUIREMENTS
- OTHER USES INCLUDE REFLECTIVE PAINT, MATCH HEADS, GLASPHALT, ETC.

PAPER

Two types of pulp

- Chemical (kraft) & mechanical (groundwood)
- Chemical by far the most common

Packaging is 62% of paper generation

- Mostly boxes
- Printed paper 24% & declining
- Tissue, towel, plates, "other" the remainder

Most important recyclable in terms of weight & revenue

NOW WE GET MORE COMPLICATED

PAPER PRODUCTS ARE MADE FROM EITHER CHEMICAL (KRAFT) OR MECHANICAL (GROUNDWOOD) PULP

- KRAFT IS BY FAR THE LARGEST COMPONENT
- KRAFT IS USED FOR PACKAGING & MOST PRODUCTS
- GROUNDWOOD IS USED FOR NEWSPAPERS & SOME OTHER PRODUCTS

EPA PAPER DATA 2018:

- CORRUGATED BOXES ARE AMOST HALF OF THE PAPER WE USE
- PACKAGING IS 62%
- PRINTED PAPER ABOUT 24% & DECLINING
- TISSUE, TOWEL, PLATES, OTHER NONPACKAGING PAPER PRODUCTS 13.5%
- TISSUE & TOWEL PAPER & SMALL PIECES OF PAPER ARE UNRECYCLABLE ALTHOUGH COULD BE COMPOSTABLE

INDUSTRY RECYCLING DATA FOR 2022: ALL PAPER: 68%

- CORRUGATED BOXES: 93%
- https://www.afandpa.org/news/2023/us-paper-and-cardboard-recycling-rates-continue-hold-strong-2022

CORRUGATED "CARDBOARD" BOXES



WASTE360

LET'S LOOK AT THE TWO RESIDENTIAL GRADES STARTING W/CORRUGATED BOXES

LINERBOARD & CORRUGATED MEDIUM



BAY CITIES PACKAGING & DESIGN

WHERE THEY GO

CORRUGATED BOXES ARE MADE BACK INTO BOXES

- OR, MORE PRECISELY, THE TWO PRODUCTS THAT MAKE A BOX:
- LINERBOARD & CORRUGATED MEDIUM

EPA PAPER RECYCLING RATE 2018: 45,970 MT, 68.2%

- CORRUGATED BOX RECYCLING RATE 2018: 32,090 MT, 96.5%
- EPA ALL PAPER PACKAGING RECYCLING RATE: 33,890 MT, 80.9%
- https://www.epa.gov/sites/default/files/2021-01/documents/2018_tables_and_figures_dec_2020_fnl_508.pdf
- ALL PAPER DATA, TABLE 5
- PACKAGING SPECIFIC DATA, TABLES 24 & 25

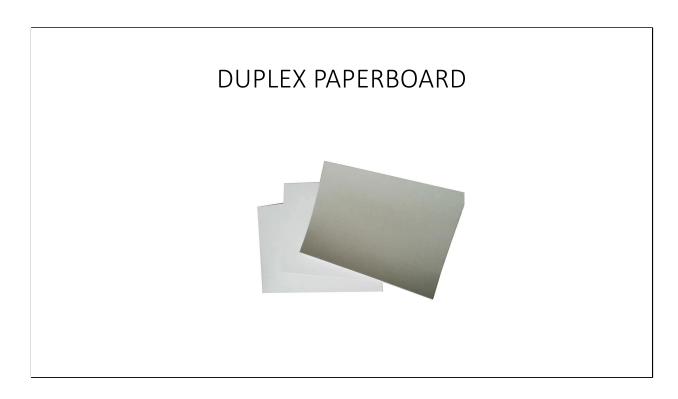
RESIDENTIAL MIXED PAPER



ROGUE DISPOSAL & RECYCLING

RESIDENTIAL MIXED PAPER, IS, AS YOU CAN SEE, A WIDE VARIETY OF PAPER

 NO GOOD DATA SOURCES FOR ITS TONNAGE OR RECYCLING RATES SINCE COMPOSITION VARIES SO MUCH



BOX PACKING SOLUTION

https://www.boxpackingsolution.com/packaging-design-guidance/paper-materials-apply-for-paper-packaging/clay-coated-news-back-ccnb/

CAN BE USED FOR BOXES, VARIOUS PAPER GRADES, MOLDED PULP, ETC.

- DUPLEX BOARD IS A UNIQUE KIND OF PAPERBOARD
- OFTEN USED FOR PHARMACEUTICAL PACKAGING, GARMENT BOXES, PAPER PLATES & CUPS

NOW WE GO TO PLASTICS WHICH, NO SURPRISE, ARE THE MOST COMPLICATED OF ALL

PLASTICS

Multitude of resins

- PET, HDPE & LDPE/LLDPE 78% of packaging resins
- LDPE/LLDPE, PP & HDPE 65% of all plastic resins in waste stream
- 12% of all resins and less than 3% of packaging resins are other resins

Packaging gets the most attention but is only 41% of plastic waste generated

- · Nondurables are 21%
- Durables 38%

Plastic recycling rate is 8.7%

- Packaging is 2/3 of the plastics recycled
- Durables are most of the rest and are an array of carpet, mattress, clothing, electronics, etc.
- Packaging recycling rate is 13.6%
- 29% of plastics packaging is "bags, sacks & wraps" 10% recycling rate
- 31% of plastics packaging is "other" coatings, closures, trays, loose fill, clamshells, etc. 2.7% recycling rate All data EPA 2018

DATA EPA 2018 TABLE 8, https://www.epa.gov/sites/default/files/2021-01/documents/2018_tables_and_figures_dec_2020_fnl_508.pdf

THIS IS WHY PLASTIC RECYCLING IS SO DIFFICULT

- SO MANY RESINS
- SO MANY PRODUCTS & APPLICATIONS
- SO MUCH UNIQUE VERSATILITY IN USE

A UNIVERSAL RECYCLING PROCESSING TECHNOLOGY DOES NOT EXIST

LET'S LOOK AT THE PRIMARY PLASTIC PRODUCTS COLLECTED AT THE CURBSIDE STARTING W/PET

PET BOTTLES



GREENMAX INTCO RECYCLING

WHERE THEY GO

PET BOTTLES ARE MADE BACK INTO BOTTLES OR FIBER (CARPET/CLOTHING, ETC.) PRODUCTS

- FIBER COMPANIES CREATED PET RECYCLING & WERE THE PRIMARY MARKET UNTIL 2020
- NOW A LARGER PERCENTAGE GO TO BOTTLE MARKETS THEN FIBER THEN OTHER END USES

EPA PET BOTTLE RECYCLING RATE 2018: 910 TT, 29.1%

- https://www.epa.gov/sites/default/files/2021-01/documents/2018_tables_and_figures_dec_2020_fnl_508.pdf
- ALL PLASTIC DATA, TABLE 8
- PACKAGING SPECIFIC DATA, TABLES 24 & 25

INDUSTRY RECYCLING DATA FOR 2022:

- PET BOTTLES 29% https://napcor.com/news/2022-pet-recycling-report/
- STINA/ISRI/NAPCOR REPORT 1,910.8 Millions of Pounds) https://resourcerecycling.com/recycling/wp-content/uploads/sites/3/2024/04/Post-Consumer-Recycling-Data-PR-3-28-2024.pdf



HARDY PACKAGING LTD

PET CAN ALSO BE USED TO MAKE CLAMSHELL CONTAINERS, PRODUCE TRAYS & OTHER PLASTIC PACKAGES

- THIS IS A SLIGHTLY DIFFERENT MANUFACTURING PROCESS
- CLAMSHELLS CANNOT BE RECYCLED W/PET BOTTLES TO MAKE BOTTLES
- HOWEVER CLAMSHELLS CAN BE RECYCLED W/PET BOTTLES TO MAKE FIBER PRODUCTS
- THE CLAMSHELL RECYCLING RATE IS UNKNOWN https://napcor.com/news/2022pet-recycling-report/

NATURAL HDPE BOTTLES



BIFFA

WHERE THEY GO:

NATURAL HDPE BOTTLES & JUGS ARE USED FOR MILK, WATER & SOME FRUIT JUICES

- BECAUSE THEY ARE NOT DYED THEY CAN BE COLORED & USED BY MANY END MARKETS
- THEIR PRIMARY MARKET IS NON-FOOD-CONTACT COLOR HDPE PACKAGES SUCH AS DETERGENT& SHAMPOO BOTTLES

EPA NATURAL HDPE BOTTLE RECYCLING RATE 2018: 750 TT, 29.3%

- https://www.epa.gov/sites/default/files/2021-01/documents/2018_tables_and_figures_dec_2020_fnl_508.pdf
- ALL PLASTIC DATA, TABLE 8
- PACKAGING SPECIFIC DATA, TABLES 22 & 24
- STINA/ISRI/NAPCOR REPORT: ALL HDPE BOTTLES 846.8 MILLION POUNDS: https://resource-recycling.com/recycling/wp-content/uploads/sites/3/2024/04/Post-Consumer-Recycling-Data-PR-3-28-2024.pdf

COLOR HDPE PACKAGING



BERG MILL SUPPLY

COLOR HDPE IS WIDELY USED FOR SHAMPOO, DETERGENT & OTHER BOTTLES & JUGS & TOOTHPASTE TUBESE & A HOST OF NON-FOOD CONTACT PACKAGES

WHERE THEY GO

THE DYES CANNOT BE REMOVED FROM THE RESIN IN MECHANICAL PROCESSING

 AS A RESULT, THESE COMMON PACKAGES GO TO NON-PACKAGING USES SUCH AS PIPES

EPA OTHER HDPE PLASTIC CONTAINER RECYCLING RATE 2018: 220TT, 18.1%

- https://www.epa.gov/sites/default/files/2021-01/documents/2018_tables_and_figures_dec_2020_fnl_508.pdf
- ALL PLASTIC DATA, TABLE 8
- PACKAGING SPECIFIC DATA, TABLES 22 & 24
- STINA/ISRI/NAPCOR REPORT: https://resource-recycling.com/recycling/wp-content/uploads/sites/3/2024/04/Post-Consumer-Recycling-Data-PR-3-28-2024.pdf

PIPE



ADS

WHERE COLOR HDPE PACKAGES GO

PIPING & OTHER CONSTRUCTION-RELATED MARKETS

- WHO CARES ABOUT THE COLOR OF THE SEWER OR WATER PIPE?
- DISPLACES VIRGIN PLASTIC IN A PRODUCT THAT CAN LAST FOR A CENTURY

GREEN PHILLY



KW PLASTICS

WHERE THEY GO

POLYPROPYLENE PACKAGING IS RECYCLED INTO PACKAGES OR A WIDE VARIETY OF DURABLE PLASTIC PRODUCTS SUCH AS TOYS, BATTERY CASES, GARDEN TOOLS, FIBER

- DO NOT CURRENTLY GO BACK INTO FOOD CONTACT BOTTLES
- THIS IS KW PLASTICS "TRU-SNAP" PAINT CONTAINERS
- MADE FROM 100 PERCENT RECYCLED PP

EPA PP RECYCLING RATE 2018: 20TT, 8%

- https://www.epa.gov/sites/default/files/2021-01/documents/2018_tables_and_figures_dec_2020_fnl_508.pdf
- ALL PLASTIC DATA, TABLE 8
- PACKAGING SPECIFIC DATA, TABLES 22 & 24
- STINA/ISRI/NAPCOR REPORT: PP & OTHER BOTTLES: 26.4 MILLIONS OF POUNDS: https://resource-recycling.com/recycling/wp-content/uploads/sites/3/2024/04/Post-Consumer-Recycling-Data-PR-3-28-2024.pdf



BENNINGTON COUNTY SOLID WASTE ALLIANCE

DATA IS SKETCHY "BAGS, SACKS & WRAPS":

- 4,200 MT GENERATED 2018
- 420 TT RECYCLED 2018 10% RECYCLING RATE
- https://www.epa.gov/sites/default/files/2021-01/documents/2018 tables and figures dec 2020 fnl 508.pdf
- ALL PLASTIC DATA, TABLE 8
- PACKAGING SPECIFIC DATA, TABLES 24 & 25
- STINA/ISRI/NAPCOR REPORT: FILM: 1,110.3 MILLIONS OF POUNDS: https://resource-recycling.com/recycling/wp-content/uploads/sites/3/2024/04/Post-Consumer-Recycling-Data-PR-3-28-2024.pdf

WHERE THEY GO

PLASTIC LUMBER THE PRIMARY MARKET

NOTICE WHAT IS MISSING?



QUORA

NOT DIRECTLY FOUND IN EPA DATABASE

WHAT IS IT?

- A PACKAGE THAT LOSES IT SHAPE WHEN EMPTY
- MADE OF "ANY COMBINATION OF PAPER, PLASTIC FILM & FOIL"
- TYPICALLY IS A BAG, FILM, LIDDING, OVERWRAP, POUCH, ROLLSTOCK, SLEEVE OR WRAP
- SECOND LARGEST PACKAGE W/19% OF PACKAGING MARKET
- FOOD PRODUCTS BY FAR THE BIGGEST USER AT ABOUT 52% OF SHIPMENTS
- HIGHLY LIGHTWEIGHT W/TREMENDOUS ENVIRONMENTAL ADVANTAGES
- THOSE ADVANTAGES ALSO MAKE IT TREMENDOUSLY DIFFICULT TO RECYCLE

FLEXIBLE PACKAGING ASSOCIATION: https://www.flexpack.org/

EXPORTS



PHOTO: LA TIMES: THE PORTS OF LOS ANGELES & LONG BEACH

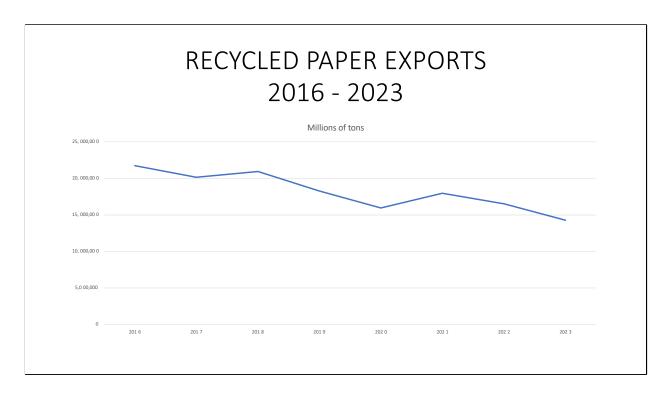
WHY DO WE EXPORT RECYCLABLES?

BECAUSE SOMEONE WANTS THEM MORE THAN WE DO

METAL & PAPER THE BIGGEST EXPORTS

- TRACKED BY MILLIONS OF TONS
- WHEREAS PLASTIC BY BILLIONS OF POUNDS
- TOTAL PLASTIC EXPORTS LESS THAN 5% OF PAPER
- ALUMINUM CANS & GLASS CULLET/BOTTLES NOT EXPORTED

PAPER EXPORTS REMAIN IMPORTANT



SOURCE: RESOURCE RECYCLING, FEBRUARY 13, 2024

PAPER EXPORTS DROPPED FROM 20.1 MILLION TONS IN 2017 TO 14.23 MT IN 2023

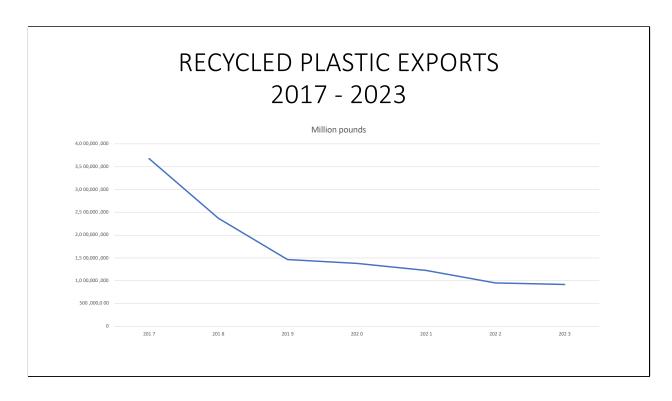
- DOWN 2.3 MILLION TONS FROM 2022 OR 13%
- DOMESTIC DEMAND IS UNDERCUTTING EXPORTS
- INDIA, THAILAND, & MEXICO RECEIVE SLIGHTLY LESS THAN HALF
- IMPORTS TO INDIA DOWN 31% & MEXICO DOWN 23%
- 67% OF EXPORTS OCC, 15% RMP
- OCC EXPORTS HAVE INCREASED WHILE RMP HAVE DECREASED OVER THE LAST DECADE

EXCESS CONTAINER CAPACITY HAS LOWERED CONTAINER RENTALS

- MIDDLE EAST WAR CAUSING BOATS TO GO SOUTH AROUND THE CAPE OF GOOD HOPE ADDING COST & TIME
- COLLAPSE OF KEY BRIDGE CAUSING PROBLEMS IN MID-ATLANTIC AREA

PAPER EXPORTS WILL BE BIG (1/3) AS LONG AS MANUFACTURING IS "OUTSHORED"

RESHORING IN IN TERMS OF MANUFACTURING JOBS UP 263% FROM 2019



EXPORT DATA RESOURCE RECYCLING, FEBRUARY 13, 2024

EXPORTS HAVE DROPPED 75% SINCE 2017 WHEN MORE THAN 3.7 BILLION POUNDS WERE EXPORTED

DECLINE SLOWING

PLASTICS: 2023:

- 918 MILLION POUNDS
- A 3.5% DECLINE FROM 2022
- WORTH NOTING THAT PET & HDPE EXPORTS HAVE BEEN DECLINING FOR OVER A DECADE

WHY?

- CHINA & ALSO INCREASED DOMESTIC DEMAND
- CANADA & MEXICO GET 55 PERCENT
- BOTH COUNTRIES SLOWLY INCREASING COMBINED EXPORT PERCENTAGE
- PRIMARILY FILM & NON-BOTTLE RIGIDS

MIXED PLASTICS & POLYETHYLENE GRADES ARE EACH 37% OF THE EXPORTS

MATERIAL RECYCLING RATES & TONNAGES - 2018

MATERIAL	TONNAGE	PERCENT
Paper	45,970	68.2
Glass	3,060	25.0
Ferrous	6,360	33.1
Plastics	3,090	8.7

(Millions of tons – USEPA data)

https://www.epa.gov/sites/default/files/2021-01/documents/2018_tables_and_figures_dec_2020_fnl_508.pdf TABLE 2

NOTE – 2017-2018 – 2.1 MILLION TON INCREASE IN TONS RECYCLED BUT

• 3% DROP IN TOTAL MSW RECYCLED & COMPOSTED

CAUSED BY CHANGE TO EPA WASTE GENERATION METHODOLOGY WHICH FOUND AN ADDITIONAL 23 MILLION TONS OF FOOD WASTE

PRODUCT RECYCLING RATES & TONNAGES - 2018

PRODUCT	TONNAGE	PERCENTAGE
Corrugated Boxes	33,260,000	96.5%
Glass Bottles/Jars	3,060,000	31.3%
Steel Cans	1,120,000	70.9%
Aluminum Cans	670,000	50.4%
PET bottles	910,000	29.1%
Milk bottles	220,000	29.3%
Other HDPE	290,000	18.1%
PP containers	20.000	8.0%
All plastic packaging	1,980,000	13.6%

(USEPA data)

https://www.epa.gov/sites/default/files/2021-01/documents/2018_tables_and_figures_dec_2020_fnl_508.pdf TABLES 5-8

CONTACT

Chaz Miller

chazmiller9@gmail.com

301-346-6507