

February 14, 2022



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Southeast Recycling Development Council

MISSION STATEMENT

Unite industry professionals, organizations, government agencies and individuals engaged in the business of recycling; to foster communications among those groups; to promote sustainable recycling programs; and, to coordinate education and public awareness activities related to recycling.

VISION

- Increase collection and recovery of quality recyclable material;
- Foster economic development via the recycling industry;
- Create a greater awareness of the recycling industry's impact in the southeast; and
- Engage in other activities as permitted by law.

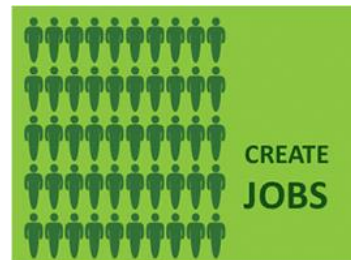
REDUCE
DISPOSAL



CAPTURE
VALUE



INVEST IN
SUSTAINABLE
GROWTH



REALIZED
POTENTIAL



RECYCLING IS DEAD.
NOW WHAT?

*The US Recycling System
Is Garbage*

U.S. Recycling Industry Is Struggling To Figure Out A Future Without China

**Your Recycling Gets Recycled, Right?
Maybe, or Maybe Not ...**

Americans' plastic recycling is dumped in landfills

**As Costs Skyrocket, More U.S. Cities
Stop Recycling**

*Recycling isn't about the planet.
It's about profit*

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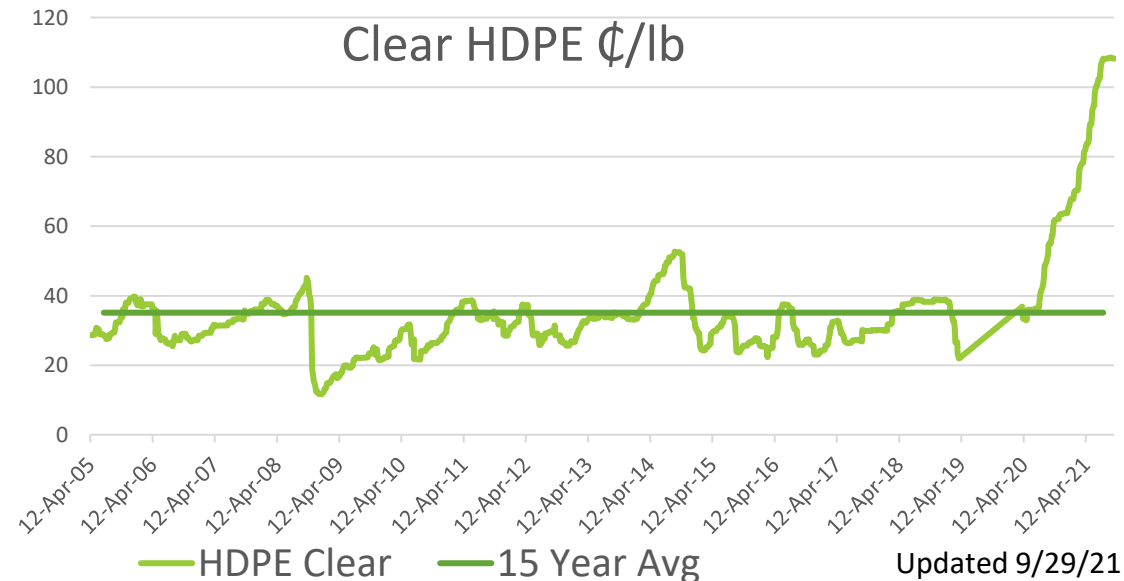
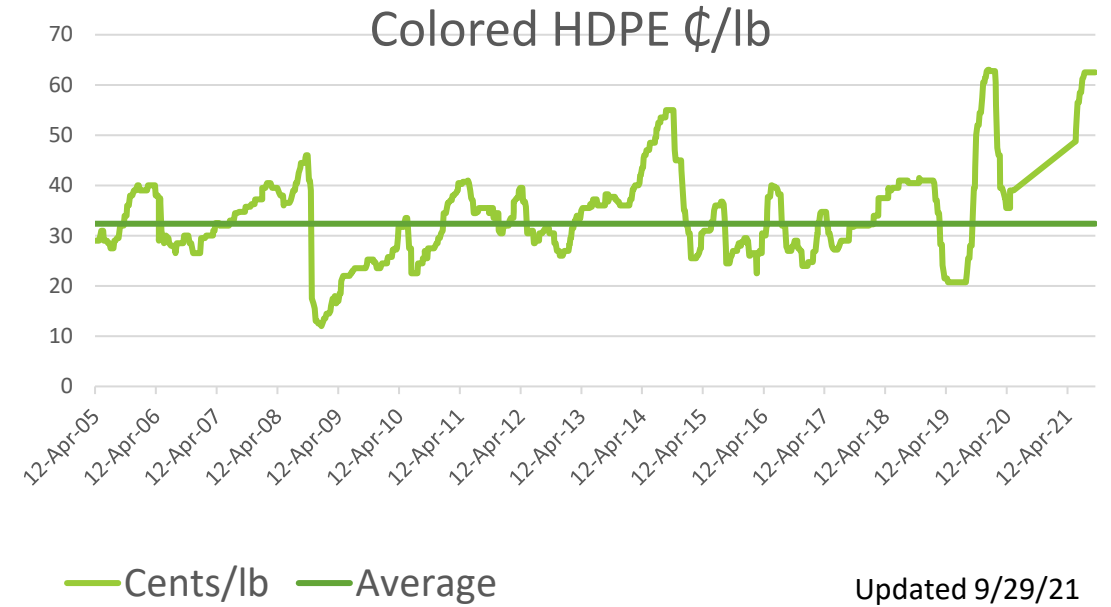
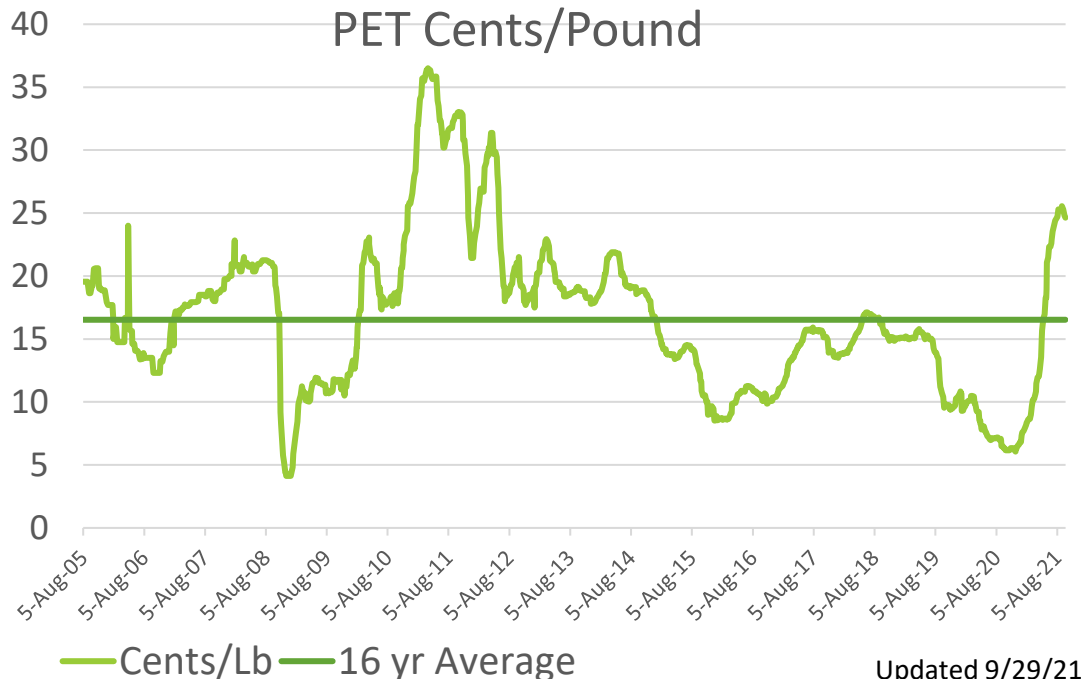
U.S. Recycling Industry Is Struggling To Figure Out A Future Without China

Your Recycling Could Be Worthless, Right?
Maybe, or Maybe Not ...

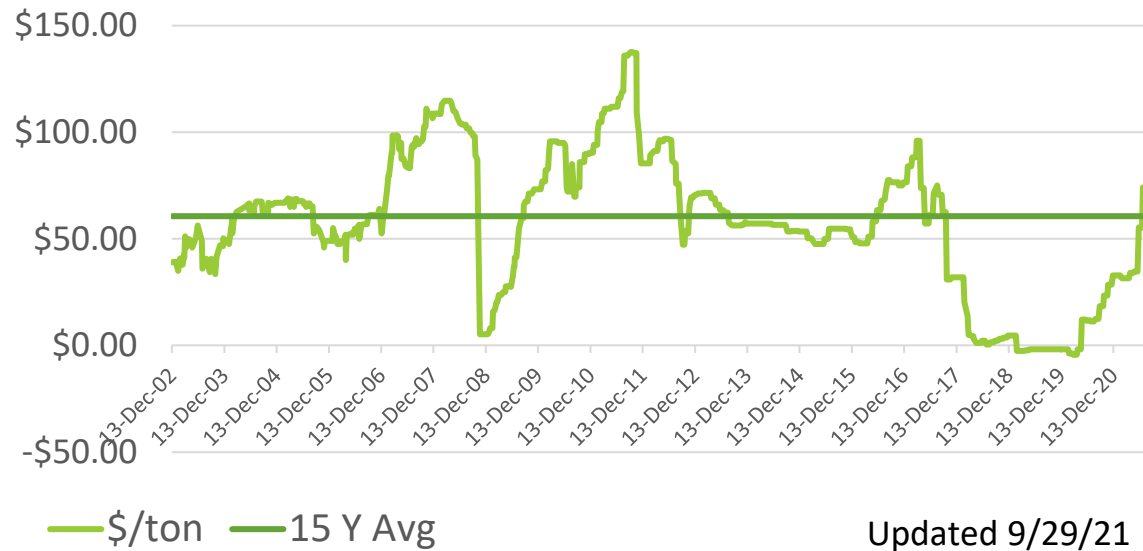
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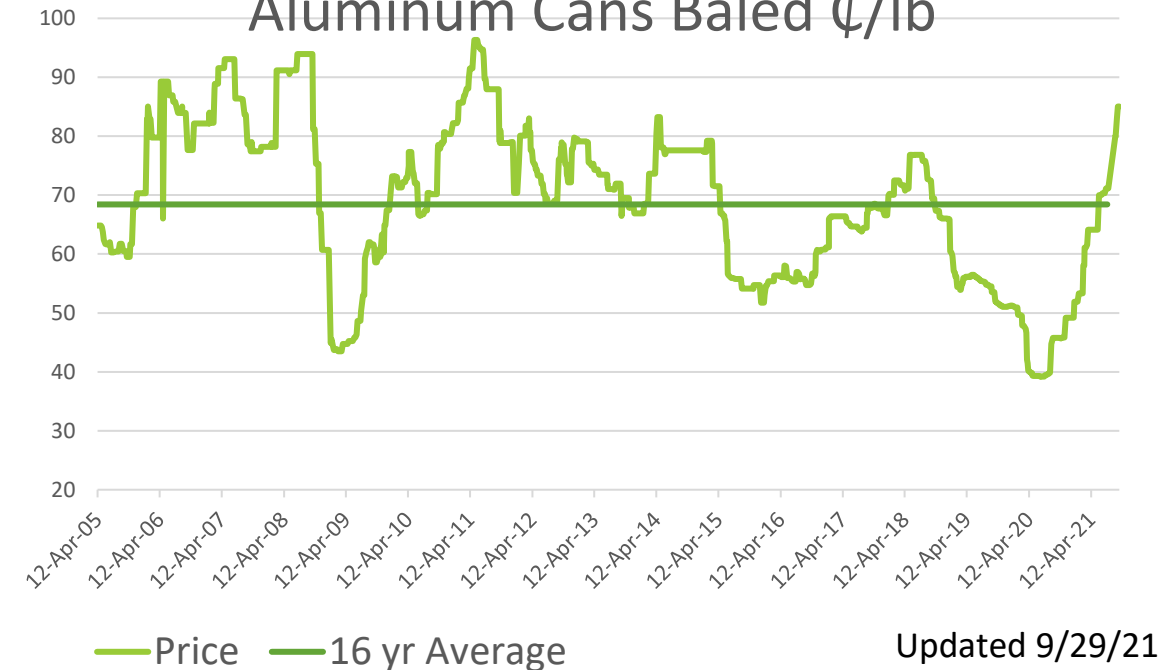
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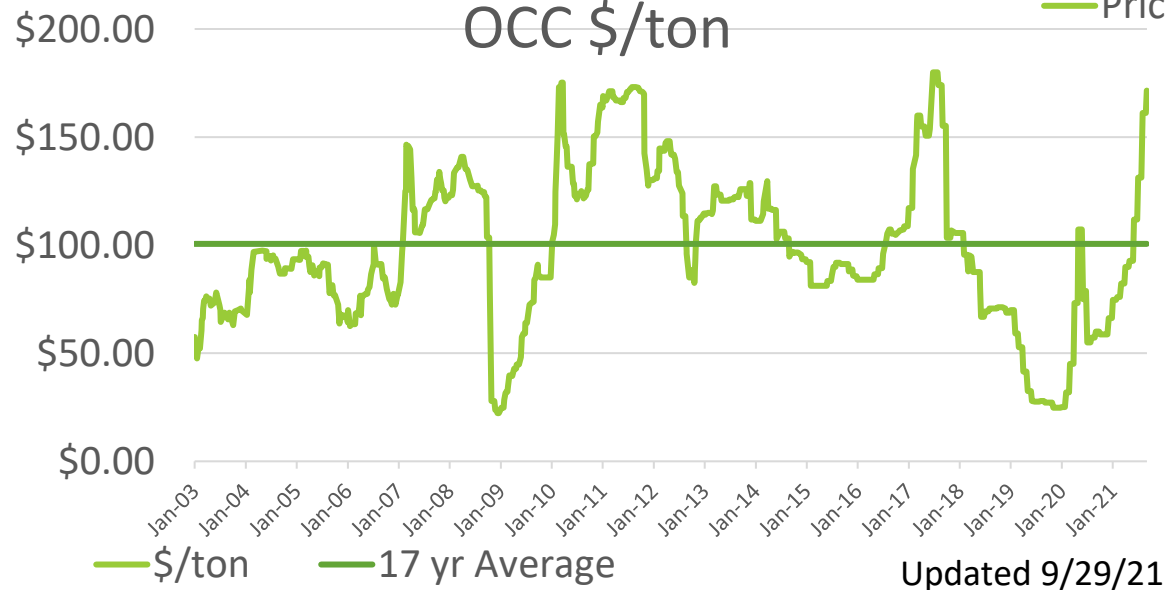
Mixed Paper \$/ton



Aluminum Cans Baled ¢/lb

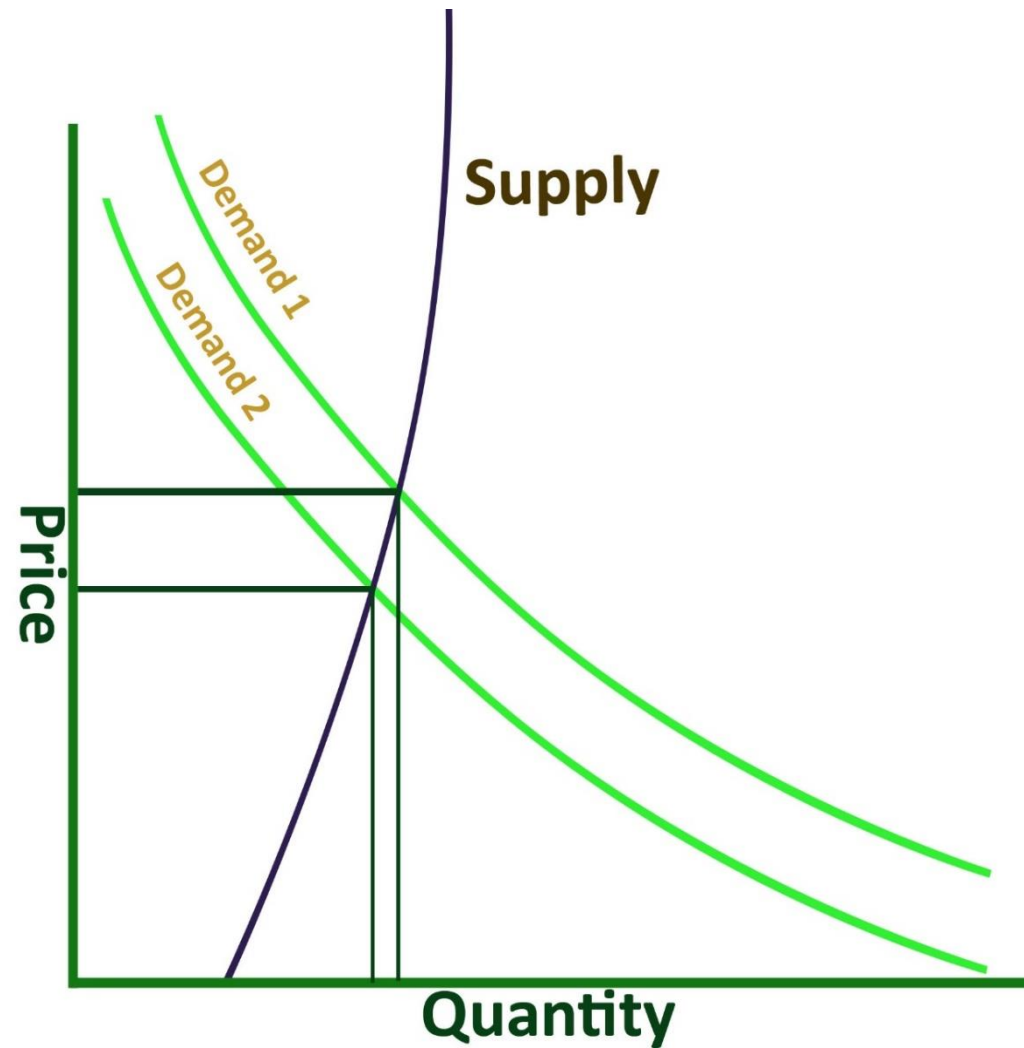


OCC \$/ton



Inelastic Supply

Small Change in
Quantity = Large Change in Price



Recycled Paper Consumption, Post National Sword

	Consumption			Source: AF&PA, 000's Short tons			
Grade	2017	2018	% Change	2019	% Change		
Mixed	3,723.7	3,797.8	2.0%	4,066.2	4.9%		
News	1,241.9	1,201.8	-3.2%	1,099.1	-8.4%		
Corrugated	21,986.9	22,594.4	2.8%	21,856.3	-3.3%		
Pulp Subs	1,002.3	968.7	-3.4%	968.5	-1.8%		
High Grade Deink	3,208.0	3,285.5	2.4%	3,226.8	-3.6%		
Total:	31,162.9	31,848.2	2.2%	31,216.9	-2.5%		
	Exports			Source: U.S. Census, 000's Short tons			
Grade	2017	2018	% Change	2019 Export	% Change	Ton chan	
Mixed	3,909.4	2,913.9	-25.5%	2,681.7	-8.0%	-232.2	
News	4,506.6	3,181.7	-29.4%	774.4	-42.2%	-2,407.3	
Other Mechanical				1,705.5	-7.4%	1,705.5	
Corrugated	9,902.7	12,526.0	26.5%	10,644.9	-15.0%	-1,881.1	
Pulp Subs	833.4	1,234.2	48.1%	1,164.7	-5.6%	-69.5	
High Grade Deink	996.7	1,134.6	13.8%	1,168.8	3.0%	34.2	
Total:	20,148.8	20,990.4	4.2%	18,140.0	-13.6%	-2,850.4	

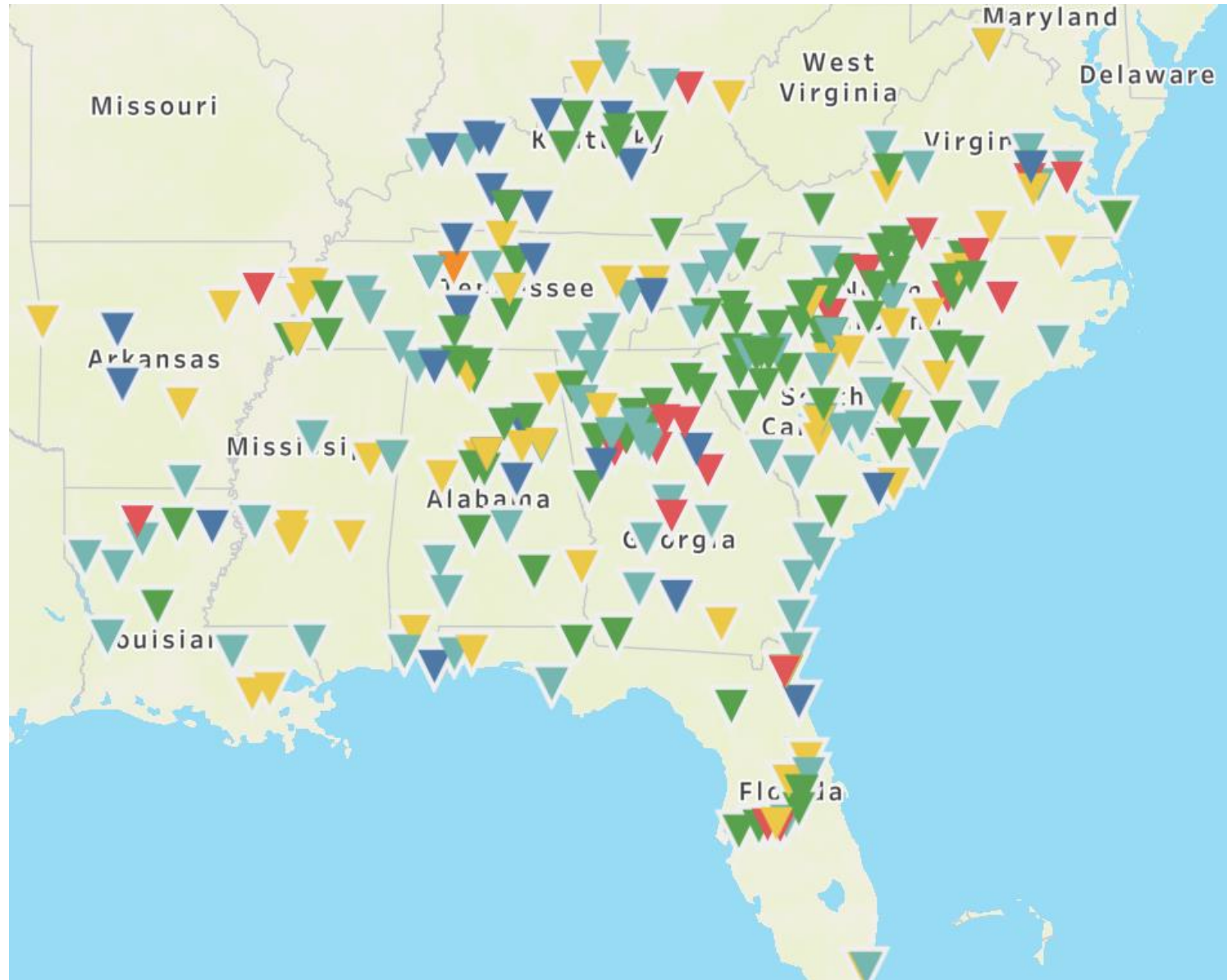
Recycling

That recycling is beneficial for the environment is probably an uncontested proposition. What is becoming increasingly more obvious is that recycling contributes to the economic health of a state's economy.

Dr. Frank Hefner

Department of Economics and Finance

College of Charleston



Recycling and Material Demand Impacts

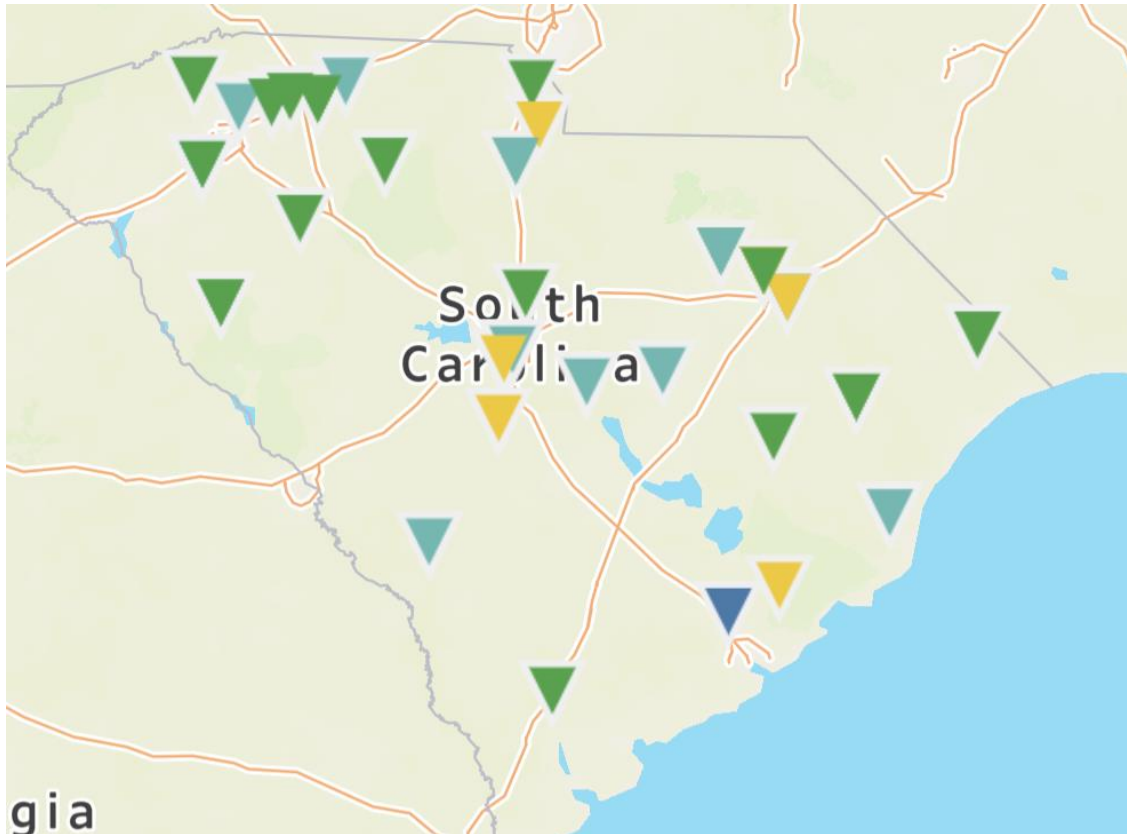
SERDC Manufacturing Data

	Plants	Jobs	Sales (millions)
Alabama	42	17,350	\$7,838
Arkansas	12	5,420	\$1,710
Florida	28	4,884	\$1,328
Georgia	49	13,151	\$7,180
Kentucky	41	11,232	\$5,171
Louisiana	13	4,887	\$1,146
Mississippi	11	1,971	\$1,947
North Carolina	60	14,142	\$4,078
South Carolina	47	10,442	\$5,563
Tennessee	40	7,730	\$4,413
Virginia	19	6,759	\$2,723
	362	97,968	\$43,097

ISRI Recycling Industry Data

	Impact (millions)	Jobs	Wages (millions)	Taxes (millions)
Alabama	\$2,145	10,477	\$539	\$187
Arkansas	\$708	3,631	\$173	\$69
Florida	\$5,000	27,144	\$1,487	\$600
Georgia	\$2,457	12,385	\$685	\$232
Kentucky	\$1,846	8,350	\$472	\$164
Louisiana	\$1,303	5,510	\$328	\$92
Mississippi	\$812	3,717	\$178	\$66
North Carolina	\$3,436	15,909	\$852	\$314
South Carolina	\$1,790	9,163	\$547	\$194
Tennessee	\$26,229	12,521	\$748	\$256
Virginia	\$1,734	8,628	\$501	\$174
	\$47,460	117,435	\$6,510	\$2,348

Recycling Feeds Manufacturing in South Carolina



Manufacturing Plants	47
Annual Sales	\$5 Billion
Manufacturing Jobs	14,708

Current Issues

Misinformation

Contamination

Fragmented
messaging

Limited recycling
access

Diverse MRF
infrastructure

Processing fee
increases

- Budget timeline

Strained local
government budgets

- Exacerbated by Covid-19 impacts

To meet brand commitments around post-consumer recycled content (PCR), plastic reclamation capacity in the US would need to increase by *at least* 50 percent from current capacity.



BURT'S BEES

The Clorox Company Burt's Bees brand states "when designing packaging, we strive to use the highest levels of post-consumer recycled, or PCR, content possible and seek to make our packaging as recyclable as possible." Burt's Bees packaging averages 34 percent PCR content and their plastic bottles average 71 percent PCR content.



SEVENTH GENERATION

Seventh Generation continues its commitment to using recycled plastics, using 100 percent recycled content PET bottles for its dish and laundry detergents.



UNILEVER

Unilever commits to 100 percent recyclable plastic packaging by 2025.



Coke's multi-year investment strategy aims to enable the company to recycle 100% of its bottles by 2030, as well as making all of its bottles with at least 50% recycled plastic



PEPSICO

PepsiCo's 2025 Sustainability goals include "Design 100% of its packaging to be recoverable or recyclable by 2025, while partnering to increase packaging recovery and recycling rates."

Market Development



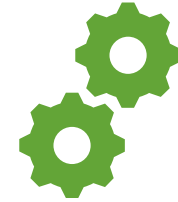
Measurement

What material demand exists



Policy

Present recycling as an economic driver



Efficiency

Hub and spoke
Reduce process costs

2022 Current Federal Bills Under Review or Passed

- Break Free From Plastic Pollution Act
- CLEAN Future Act
- COMPOST Act
- Infrastructure Investment and Jobs Act
- Ocean-Based Climate Solutions Act
- PAPER Act
- Plastic Waste Reduction and Recycling Act
- RECOVER Act
- RECYCLE Act
- REDUCE Act
- Secure E-Waste Export and Recycling Act
- Zero Food Waste Act
- Zero Waste Act

National Recycling Strategy

Objectives

- Improve markets for recycled commodities,
- Increase collection and improve materials management infrastructure,
- Reduce contamination in the recycled materials stream,
- Enhance policies and programs to support circularity, and
- Standardize measurement and increase data collection

To go beyond “Reduce, Reuse, and Recycle,” and to pave the way for sustainable management of our precious resources, it will take all of us working together.

-Michael S. Regan

Administrator, U.S. Environmental Protection Agency

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