

# Recycling Industry changes and Impacts

## Presentation of information and options for Spring Hill KS

September 10<sup>th</sup> 2020

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# Global Market Changes & Impacts on Recycling

## External Factors



2017: Over 25% of world's recyclables were imported by China, including >50% of paper & plastics



China's new import policies banning materials & limiting contamination have global impacts on recycling programs in communities across US



Operation Blue Sky = screening effort at China's ports to inspect loads, enforce material bans & 0.5% contamination limit. Trade wars adding to supply glut



Situation not likely to improve – China appears to be on path to eliminate imports of all post-consumer recyclables by 2021



The reduction of China's markets resulted in oversupply of commodities & depressed commodity pricing – **Supply is high & commodity pricing low**

**IN THE WAKE OF CHINA'S IMPORT BAN ON MIXED PAPER, PAPER RECYCLERS AND TRADERS ARE RUSHING TO FIND NEW MARKETS. BY MEGAN QUINN**

*Oh, Scrap! China, Biggest Buyer of U.S. Trash, Wants It No More*

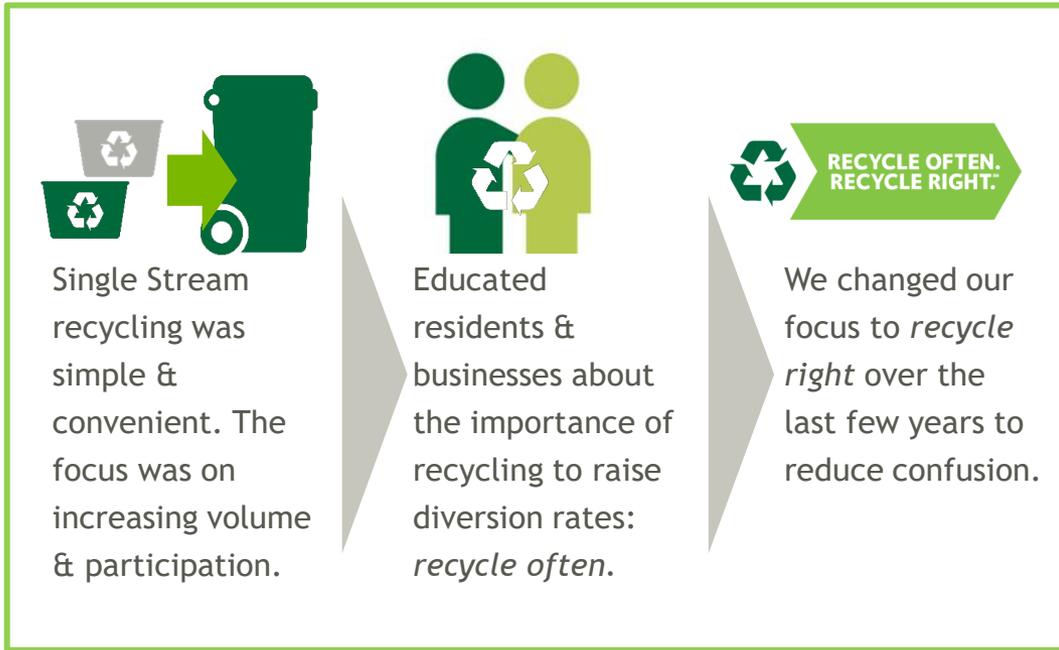
\* \* \*

Piles of recycled bottles and boxes are 'backing up right now as we speak'

***"The whole world is going to have to re-calibrate to the 0.5%. Everything is driven on quality now."***

***- Mill Buyer***

# The Evolution of Recycling



## What hasn't changed:

- ✓ People still want to recycle & “do the right thing”
- ✓ States & local government have established recycling bans, goals & mandates
- ✓ “The Right Thing” must be reframed - not all materials can be recycled

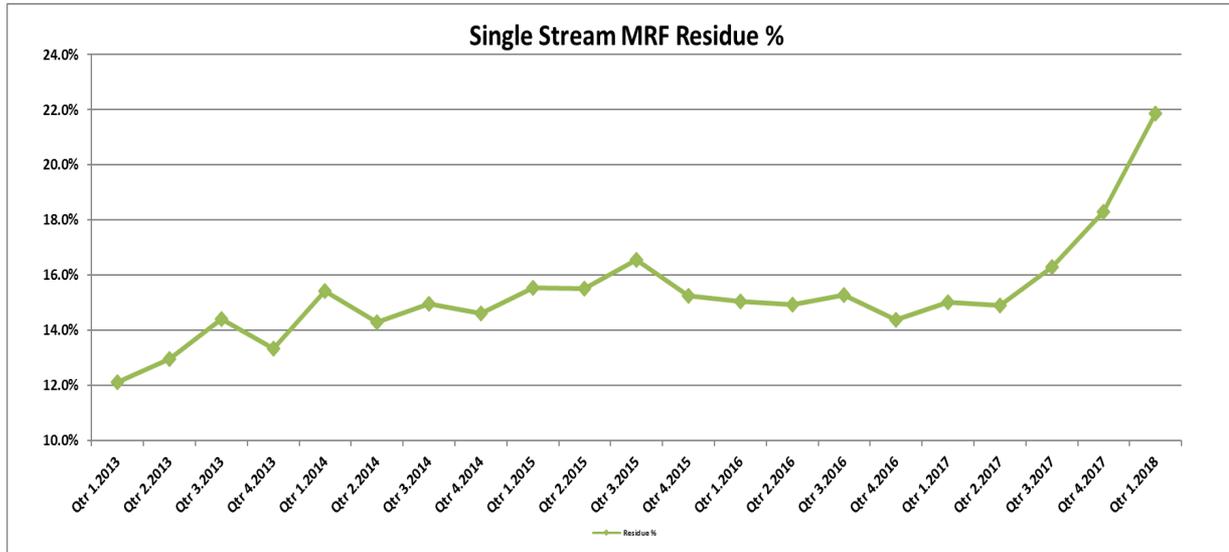
## What has changed:

- ✓ China is enforcing a 0.5% contamination rate and complete ban of mixed paper
- ✓ Operating costs have increased
- ✓ Diversion has led the way to aspirational recycling



# Single Stream Contamination

## Recycling Residue Trend



- Every ton of material we receive includes ~450lbs of contaminates; our customers expect <10 lbs

Single Stream residue rates ~25% on average in Johnson and Miami county as of June 2020



# Education

## Overview

- Simplify recycling education programs
- Educate customers on how to “Recycle Right”
- Waste Management encourages customers to visit [www.RORR.com](http://www.RORR.com) for educational materials



To Learn More Visit: [RecycleOftenRecycleRight.com](http://RecycleOftenRecycleRight.com)

#RORR

© 2014 Waste Management. The Recycle Often Recycle Right™ recycling education program was developed based upon national best practices. Please consult your local municipality for their acceptable materials and additional details of local programs, which may differ slightly.



### WHY Recycle?



**Plastic bottles**  
can turn  
into clothing



**Aluminum cans**  
can turn into new  
ones in 60 days



**Today's news**  
can become a  
new cereal box

### How to Recycle:



Recycle all bottles,  
cans and paper



Keep items clean  
and dry



No plastic bags

# Options to keep recycling sustainable moving forward



- **Option #1:** Recycling rate increase to decontaminate recycling from Spring Hill KS to meet new industry standards.
  - Increase amount of .51 cents per home per month (approximately .11 cents per week).
- **Option #2:** Recycling rates remain the same but collection reduces to every other week.
  - Waste Management will divert savings from reduced collection expense to cover increased costs of decontaminating recycling from Spring Hill KS.
  - Options for 96gl recycling cart vs current 65gl carts to store recycling volumes longer.
- **Option #3:** Spring Hill can choose to do nothing.
  - To maintain clean recycling, Waste Management drivers would “inspect” carts at the curb and NOT collect any carts that contained contamination.
  - Increase in the time required to complete collection routes.

# Thank you for your time.

## Questions?

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