



Recycling In America

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

May 1, 2025

Our Plan for Today

Welcome! What's on your mind?

Setting the Stage: What do the data say?

Perspective from the Field: Guest speakers

Deeper Dive: Your questions & experience



MRFs: Unpacking the Mystery of Recycling's Magical "Black Boxes"

Speakers



Brent Bell

VP Recycling, WM



**Eduardo Q.
Rodriguez**

*Deputy Public Works
Director, City of
Phoenix*



Justin Gast

*Materials Management
Specialist, Oregon
Department of Environmental
Quality (DEQ)*

Chat Support



Dan Leif

*Policy Implementation
Director*



Scott Mouw

*Senior Advisor of
Strategy and
Research*



**The Recycling
Partnership**

Building a Better Recycling System

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...



Materials Recycling Facilities (MRFs)



Requirements of an Effective Recycling System

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



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

What makes a MRF?

There are many types of recycling processing facilities in the U.S.

This conversation focuses on commingled residential MRFs – facilities that process recyclables separated from trash (single or dual stream) and sort such materials into individual commodities to be sold to market.

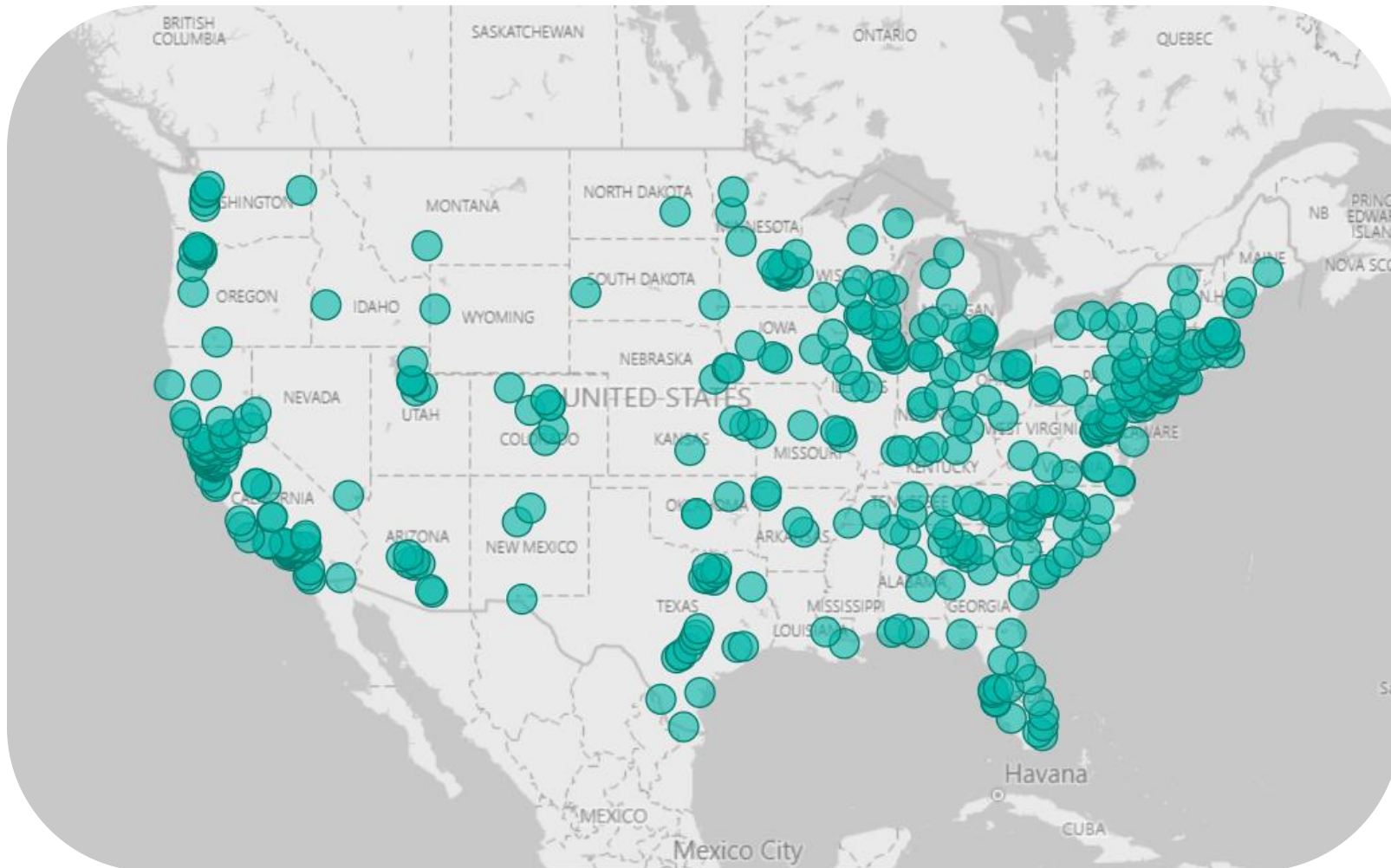
Other kinds of processing facilities include commercial MRFs, paper processors, glass beneficiation plants, and plastic reclaimers.

How does EPA describes the stage of processing?

“materials are transported...to a processing facility... recyclables are sorted, cleaned of contaminants, and prepared for transport to a milling facility or directly to a manufacturing facility”

Map of Commingled Residential MRFs in the U.S.

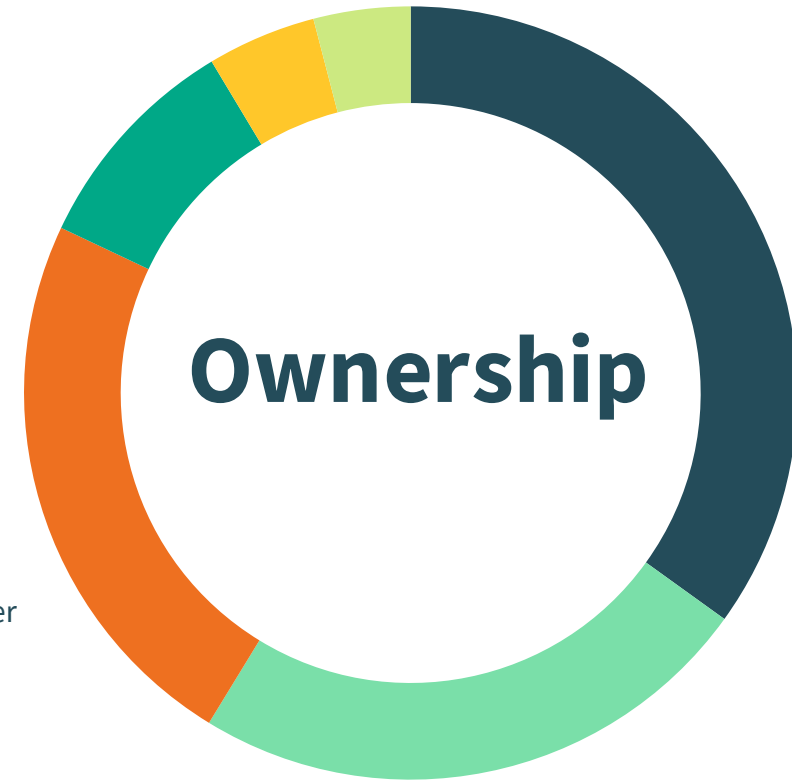
Where are MRFs located?



More than half of the ~400 commingled residential MRFs in the U.S. are operated by private or publicly traded haulers.



- Publicly Traded Hauler
- Local Government
- Private Hauler
- Pure Play Recycler
- Paper Company
- Other



Ownership ≠ Operation

While local governments own nearly 25% of all MRFs, they operate only ~15%.

Eureka Recycling receives over \$10M in financing to upgrade MRF

WM, Waste Connections and Rumpke celebrate MRF openings and upgrades

Florida, Ohio, Illinois and Pennsylvania facilities are among those that showcase advanced equipment meant to collect more material and promote safety.

\$25M Baldwin County recycling facility expected to be completed next month

Bringing curbside pickup and new educational buildings

Waste Connections to build its first MRF in Colorado in partnership with AMP

The automated MRF, designed to respond to the state's changing recycling landscape due to EPR, will include AMP's AI-powered equipment.

MRFs in motion: New facilities progress in Texas, Alabama

Balcones Recycling opens new \$68M MRF in San Antonio

Meant to handle recycled materials from Balcones' 15-year contract with the city, the facility is one of the most automated MRFs in the U.S., the company says.

Investing in future growth

WM has upgraded its Germantown Recycling Facility in Wisconsin, one of 13 facilities the company is upgrading or adding this year.

Piecing It Together

Why do MRFs matter?

MRFs represent an essential link in the chain of the U.S. residential recycling system – referred to as processing and sortation.

Serving as the primary go-between for community recycling programs and end users of recycled materials, MRFs can influence:

- Who has access to recycling service
- Which materials are accepted by a community recycling program
- Whether companies have access to recycled content
- Cost and quality of recycled content

MRFs exist to reduce recycling collection costs and simplify the process of recycling for the average resident. With these benefits, there are also challenges.

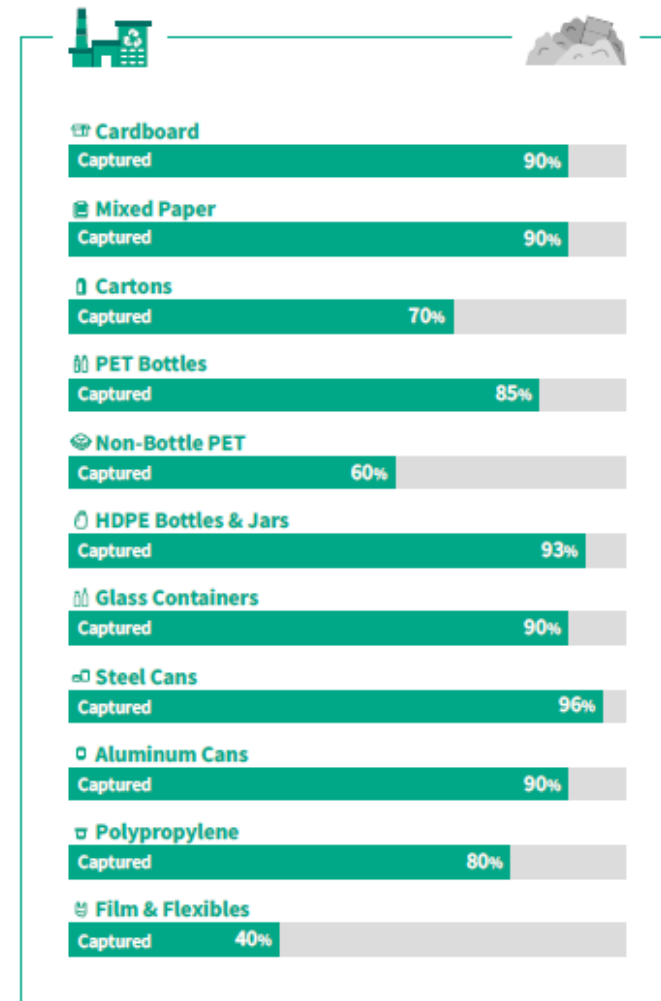


Why are some recyclables more difficult to sort and process?

Factors include...

- Economics (cost to sort > price to sell)
- Physical qualities (e.g., shape-shifting)
- “Look-alike” issue (market prevalence)
- Equipment/technology limitations
- Contamination

MRF Capture Rates



Opportunities Ahead

Excerpts from EPA's Recent Assessment

“While some facilities have been recently updated with the latest sorting and processing technology and have expanded capacity, **many facilities still require technological updates to streamline the sortation process** and more efficiently address contamination of incoming materials. In addition, **there are many regions of the U.S. with few or no recycling facilities.**”

“In addressing the identified gaps in the recycling system, **investments in education, collection, and processing capacity should be made simultaneously, along with policies** to disincentivize landfilling materials (e.g., pay-as-you-throw programs) and to promote the use and sale of recycled material (e.g., minimum post-consumer recycled content mandates). Recycling programs across the U.S. can leverage financing mechanisms such as private equity, public-private partnerships, and government grants to fund investment in such recycling projects and programs.”

Case Study: Mecklenburg County, North Carolina

Unlocking Non-Bottle PET Recycling in North Carolina's Largest City



What's Working & What's Not

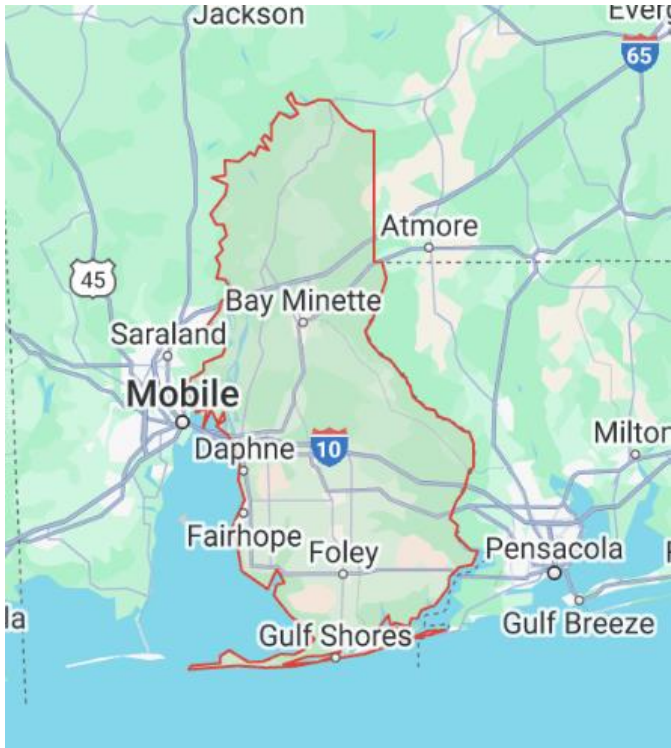
- **Access:** Majority of single-family residents have access to curbside recycling
- **Engagement:** Outdated curbside recycling guidance; low participant capture
- **Sortation and Processing:** Aging MRF equipment, reliance on human sortation, limited material acceptance
- **End Markets:** Located near end users of recyclables, including plastics reclaimers
- **Political support:** County leaders approved a \$25.7 million retrofit to its existing MRF

What We Did About It

- **Infrastructure investment + Coordinated outreach:** Purchased a new optical sorter, conveyors, and other equipment and supported a concurrent public campaign to educate and engage residents. The results?
 - Capturing up to **5.6 million more pounds** of PET bottles per year,
 - Enabling residents to **recycle non-bottle PET** – for the first time
 - Encouraging **increased participation** and household capture.

Case Study: Baldwin County, Alabama

New Recycling Facility in Alabama Will be Catalyst for Expansion



What's Working & What's Not

- **Access & Engagement:** More than half of all households in Alabama lack access to recycling; only a few cities offer curbside collection in Baldwin County
- **Sortation and Processing:** All material is shipped out of state, increasing costs
- **End Markets:** Located near end users of recyclables, including plastics reclaimers and aluminum mills
- **Political support:** Baldwin County Commission recognized recycling as important

What We Did About It

- **Layered regional investment:** Numerous grants and efforts were leveraged to expand and improve drop-off recycling collection, purchase processing and sortation equipment (optical sorter, eddy current separator) to efficiently collect and sort PP, PET, and aluminum. The results?
 - Increased quantity and quality: **516,000 new pounds (17.9 million individual cans) of aluminum** and **1.3 million new pounds of PET** captured per year
 - Empowers neighboring communities to **expand recycling access**

MRFs: Unpacking the Mystery of Recycling's Magical "Black Boxes"

Speakers



Brent Bell

VP Recycling, WM



Eduardo Q. Rodriguez

*Deputy Public Works
Director, City of Phoenix*



Justin Gast

*Materials Management
Specialist, Oregon
Department of
Environmental Quality (DEQ)*

To achieve the environmental and economic goals of recycling, we must increase recycling access, participation, and capture.



How?

Companies

Advocate for smart, well-designed policy and invest in material-specific solutions today. For maximum impact, [join The Partnership](#).

Communities

Level up your local program by incorporating [best practices](#) into your community's MRF contract.

Policymakers

Unlock needed investments in the U.S. recycling system by supporting 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 8, 2025

Part 3 – End Markets

- If recyclables have nowhere to go, are they really recyclables?
- 2:00 – 3:00pm EST

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



An initiative from The Association of Plastic Recyclers

- During the month of May, MRFs and Reclaimers across the US will host public tours
- An effort to counter misleading information and rebuild community confidence and participation in the recycling system
- Locate and register for a tour in your community!

Visit RecyclingInAction.org

Get in Touch:

The Recycling Partnership

✉ info@recyclingpartnership.org

🌐 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.