



Recycling In America

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

May 22, 2025

Our Plan for Today

Welcome! What's on your mind?

Setting the Stage: What does the data say?

Perspective from the Field: Guest Speakers

Deeper Dive: Your questions & experience



Policy: Shaping the Future of Recycling

Speakers



Megan Daum

*Vice President,
Sustainability, American
Beverage Association*



Kate Bailey

*Chief Policy Officer,
The Association of Plastic
Recyclers*



Kirk Koudelka

*Assistant Commissioner,
Minnesota Pollution
Control Agency*

Policy: Shaping the Future of Recycling

Chat/Q&A Support



Dan Leif

*Director,
Policy Implementation*



Scott Mouw

*Senior Advisor,
Material Systems*



Alex Stockler

*Manager,
Public Policy &
Government Affairs*



Anthony Tusino

*Director,
Public Policy &
Government Affairs*



Dylan de Thomas

*Vice President,
Public Policy &
Government Affairs*

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...



Policy

Shaping the Future of Recycling



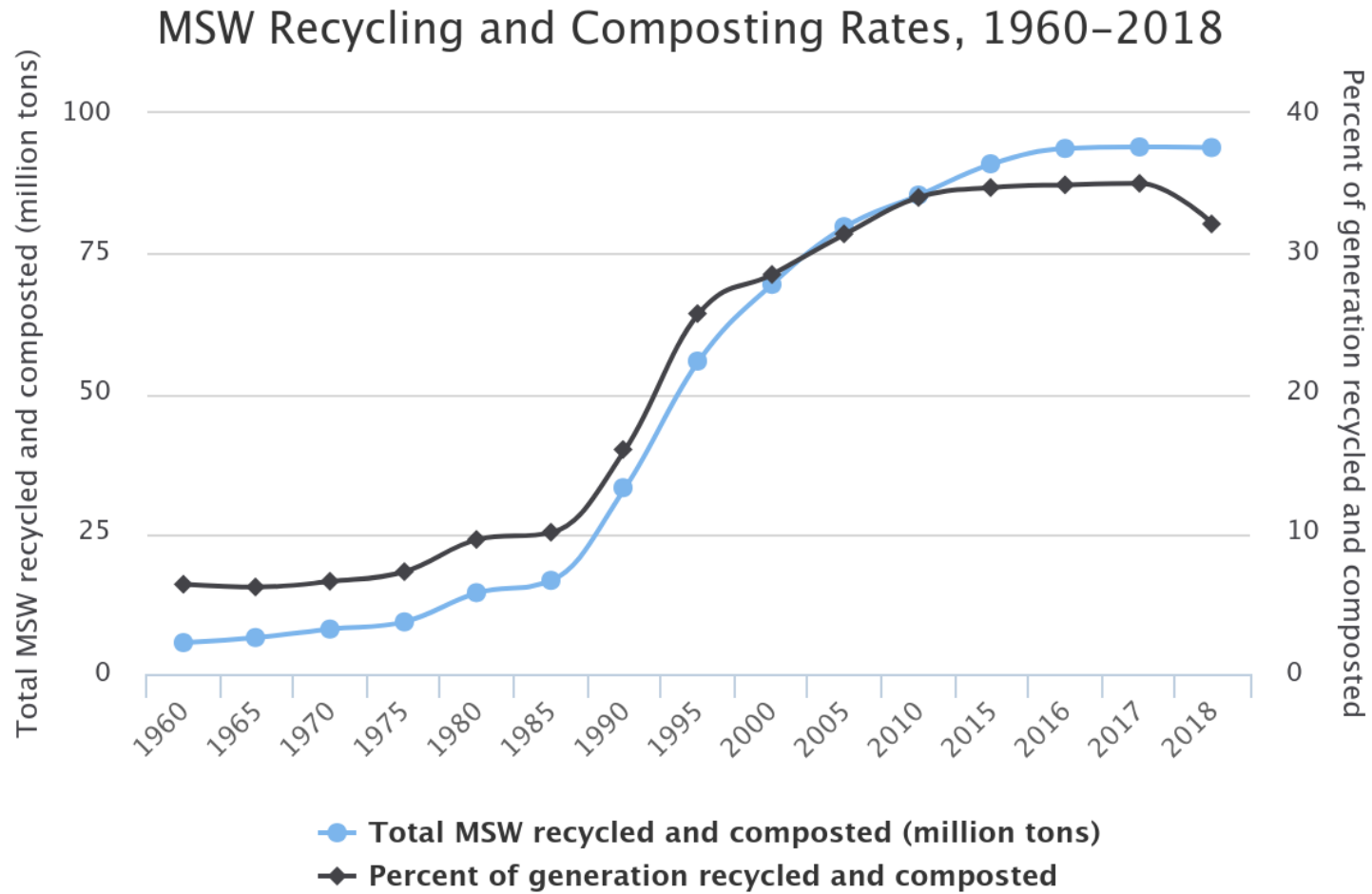
Requirements of an Effective Recycling System

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



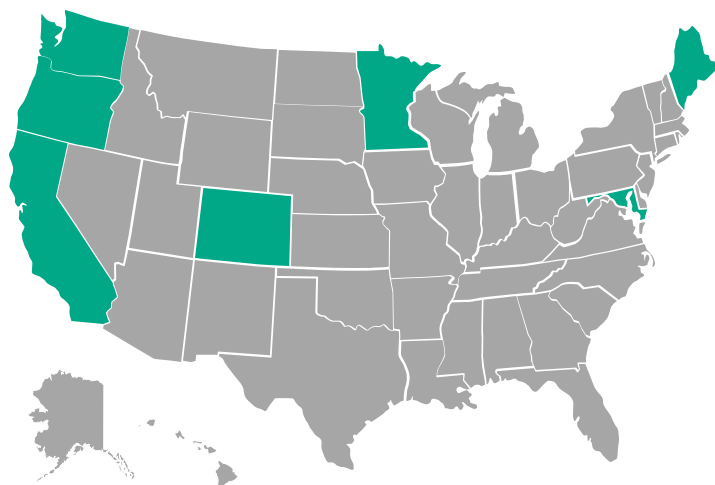
| | Current Level | Target Level |
|------------|--|------------------------|
| N/a | More information needed on packaging design – to be provided with policy . | 100% |
| C | Access to Recycling 73% | 100% |
| F | Households Participating 43% | 90% |
| B+ | Facilities Able to Process Recyclables 87%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

History of Recycling in the U.S.



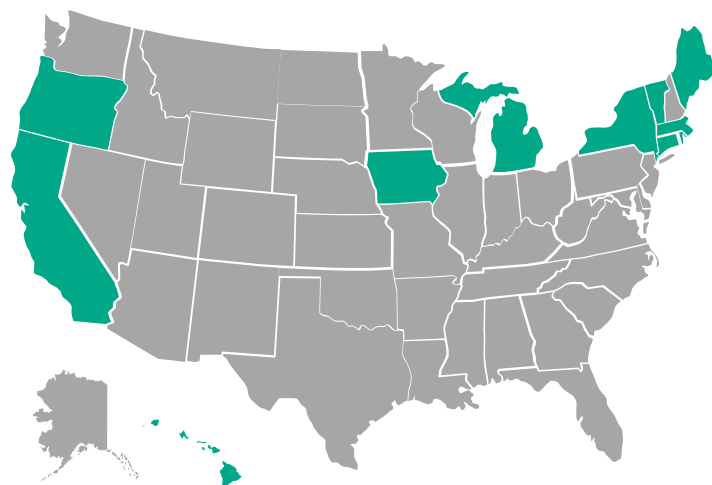
Where is recycling policy already enacted?

EPR for Packaging



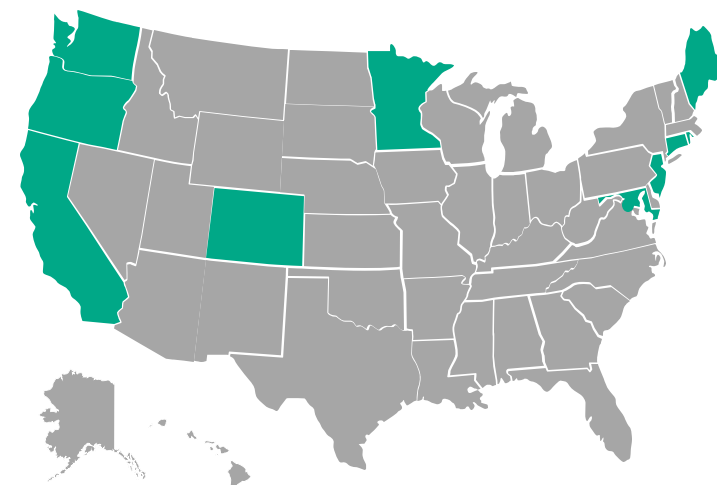
 EPR Passed


DRS/Recycling Refund



 DRS/Recycling Refund

Min. Recycled Content



 Minimum recycled content
mandate/PCR requirement

Recycling policy is gaining momentum.



Since curbside recycling gained popularity in the late 1980-1990s, we are seeing a wave of recycling policy momentum unlike any time before.

There are numerous reasons why, including:

- Landfill constraints
- China's National Sword policy
- U.N. Plastic Pollution negotiations
- Shift in public opinion/expectations
- Growing popularity of EPR

Not all EPR legislation is created equal – many factors vary from state to state.

| State | California | Colorado | Maine | Maryland | Minnesota | Oregon | Washington |
|--|-----------------------------------|--------------------------------------|---------------|--|--|--|--|
| Scope of Materials | All packaging & plastic food ware | Printed paper & packaging | All packaging | Packaging and paper products | Packaging and paper products | Printed paper & packaging and plastic food ware | Packaging and paper products |
| Cost Coverage Scope | Improvements | 100% | Full | Reimbursement for covered services – up to 90% by 2030 | Reimbursement for covered services – up to 90% by 2031 | Improvements (est. 28%) | Reimbursement for covered services – up to 90% by 2032 |
| Multiple PROs | Yes (after 8 years) | No | No | Yes, after 7/1/2033 | Yes, after first stewardship plan ends (5 years) | Yes (10% market share requirement) | Yes, after first program plan expires (5 years) |
| Recycling Rate Requirements | 65% for plastics | Set w/ PRO Plan | Set by DEP | Set by MDE – Informed by Needs Assessment | Set by MPCA – Informed by Needs Assessment | 25% by 2028, 50% by 2040, 70% by 2050 for plastics | Set by Ecology – Informed by Needs Assessment |
| Recycled Content Mandates | No (set in other statute) | Set w/ PRO Plan | Set by DEP | Set w/ PRO Plan – Informed by Needs Assessment | Set w/ PRO Plan – Informed by Needs Assessment | No (eco-modulation factor) | Set by the Department – Informed by Needs Assessment |
| Education and Outreach | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| Exemptions for Bottle Bill Material | Yes | Yes, if future bottle bill is passed | Yes | Yes, if future bottle bill is passed | Yes, if future bottle bill is passed | Yes | Yes, if future bottle bill is passed |
| Responsible End Market | Yes | Yes | No | Yes | Yes | Yes | Yes |

EPR State Harmonization

We are beginning to see more harmonization amongst state EPR laws, following the passage of Minnesota's law. Areas with increasing alignment include:

1

Education and Outreach

All seven of the states which have passed EPR laws include components of mandated education & outreach for consumers.

2

Producer Definition

A more consistent definition of producer allows for ease of compliance and clearer understanding of who is obligated.

3

Needs Assessment

Performance targets and program plan goals are based upon the needs of each individual states. These assessments help tailor EPR programs to each state's needs.

While advocating for smart, well-designed, & implementable EPR we lean on key principles.



Support and Opposition of State-Level EPR

As policy is becoming more prevalent across the U.S., we are seeing both support and opposition of different recycling policies from various members of the recycling system.

Producer Support:

*AMERIPEN, EPR
Leadership Forum,
American Beverage*

EPR Opposition:

*Haulers/Service Providers,
State Business
Associations, some
Producer-Oriented Trade
Associations*

ENGO Support:

*WWF, Ocean
Conservancy,
Oceana, PSI, TRP,
Surfrider*

Opportunities for Improvement

How can we advance meaningful recycling policy?



Embrace the challenging work of partnership.

To get policy passed, it's going to take a broad coalition of support coming together – including marketplace competitors and some unusual allies.

Don't let perfect be the enemy of good.

Public policy is always a give-and-take. The time for action is now – we can do anything, but not *everything* at once.

Embrace new ideas.

Policy concepts are evolving, and so are the coalitions of opposition and support behind them.

Policy: Shaping the Future of Recycling

Speakers



Megan Daum

*Vice President,
Sustainability, American
Beverage Association*



Kate Bailey

*Chief Policy Officer,
The Association of Plastic
Recyclers*



Kirk Koudelka

*Assistant Commissioner,
Minnesota Pollution
Control Agency*

To achieve the environmental and economic goals of recycling, we must advance strong policy.



How?

Companies

Advocate for smart, well-designed policy today. You don't have to go it alone - for maximum impact, [join The Partnership](#).

Communities

Inform your policymakers on what's working and what isn't – help them connect the dots between recycling and their political priorities.

Policymakers

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

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.