

RESEARCH TOWARDS PROGRESS

CASE STUDY



Polyethylene terephthalate (PET) is used in a variety of packaging from bottles to take out containers. And as the PET stream has evolved, our understanding of what makes it into material recovery facility (MRF) bales and how reclaimers handle those bales needs to be refined.

The [PET Recycling Coalition](#), an initiative of The Recycling Partnership, doesn't operate on assumptions. We use data to inform our actions. In 2023 we partnered with RRS to get a clearer picture of what's really in the PET stream and where the biggest opportunities are hiding.



Breaking Down the Bales

Turning Data Into Action to Boost rPET Supply Across Bottles and Thermoforms

What We Tested

We analyzed 12 PET bales from five MRFs across non-bottle bill states of Ohio, Kentucky, Minnesota, and Pennsylvania.

Why It Matters

We uncovered sharper insights into the composition of PET in the stream at MRFs, details critical for designing systems that work and unlock more recycled PET (rPET) supply. And in policy states, where targets ranging from recycled content usage to recycling rates are mandatory, this level of insight is key to understanding the system and action needed.

What We Found

1. Thermoforms are in every bale.

They're universal. Reclaimers must plan for them, either by sorting separately or processing alongside bottles.

2. Most thermoforms are clear and ready to be recovered.

Berry and produce containers, the largest category, are making progress toward achieving optimal design to make them more recycling-compatible. That momentum matters.

3. Green bottles are less common but still present.

While no longer dominant, green bottles haven't disappeared.

4. Pigmented and opaque PET (non-green) is mostly bottles.

Mechanically, they look and behave like clear PET, but are mostly bottles, not thermoforms.

5. Shrink sleeves are still a barrier.

Speeding up the shift to recycling-compatible labels could unlock more high-quality rPET.

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What's Next

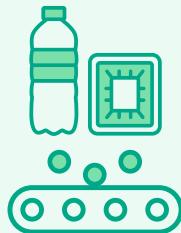
This research confirms what reclaimers have seen firsthand: the PET stream is changing. Business as usual won't cut it.



Expand the research to bottle bill states to understand how policy impacts bale composition.



Support North American end markets through regionally sourced rPET.



Expand processing strategies that increase recovery of thermoforms focusing support on reclaimers.



Accelerate design changes for shrink sleeves and thermoform labels to improve recoverability across the system.

The Coalition is using these findings to guide investments, technical assistance, and policy strategies that close recovery gaps in PET and grow the usage of North American rPET.



THE FUTURE OF PET RECYCLING WILL NOT BE BUILT ON GUESSWORK. IT WILL BE BUILT ON DATA, DESIGN, AND DECISIVE ACTION.

Join the [PET Recycling Coalition](#) to help close recovery gaps, strengthen end markets, and scale solutions that work.