



Recycling In America

PET Packaging: Solving for
an Out-of-Sync System

February 12, 2026

Our Plan for Today

Welcome! What's on your mind?

Setting the Stage: How did we get here?

Perspective from the PET Value Chain: Guest speakers

Closing: Key takeaways and actions



Antitrust Statement

The Recycling Partnership is Subject to Various Antitrust Rules.

The essential requirement of such rules is that in any Recycling Partnership meeting or event, whether in person or by virtual meeting, Recycling Partnership members do not discuss the ways in which they compete in the marketplace.

That applies particularly to prices and factors that affect prices, but also to such subjects as:

- Disaggregated costs
- Customers
- Products offered
- Strategic or business plans
- Projections

PET Packaging: Solving for an Out-of-Sync System

Speakers



Kate Eagles

Program Director, Policy & Markets
The Association of Plastic Recyclers
(APR)



Alasdair Carmichael

Program Director
NAPCOR



Molly Laverty

Director, Sustainability
Reporting and Engagement
Primo Brands



Christopher Slafter

Senior Sustainability Specialist
San Mateo, CA
Sustainability Department

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Webinar Host



Keefe Harrison

CEO
The Recycling Partnership

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Chat/Q&A Support



Chris Wirth

*Chief Market
Innovation Officer*



Adam Gendell

*Director,
Material Systems*



Kate Davenport

Chief Impact Officer



Brittany LaValley

*Sr. Vice President,
Impact Strategy and
Management*



The Recycling Partnership is the U.S. nonprofit solving recycling's toughest challenges, together.

Reminder: 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.

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How the System Works

Recycling is a **local system** that feeds into a **national one**.

It works best—economically and environmentally—when domestic end markets turn **old stuff into new stuff**, creating a circular economy.





PET bottle recycling works, backed by years of community program and infrastructure investment.

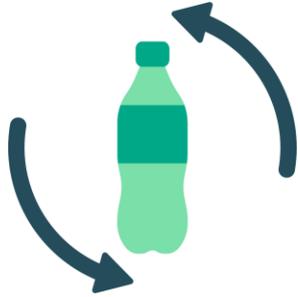
Nearly 2 billion pounds of PET bottles are collected for recycling annually in the U.S.

Source: NAPCOR (U.S. 2023)

Today's Reality

A proven PET recycling system - now under strain

and the system must get back on track



Imports of recycled feedstock are **displacing North American** recycled feedstock.



U.S. reclaimer businesses are **closing** because of this **weakening demand**.



This directly **negatively impacts** recycling **policy** objectives and **public interest**.

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Imports



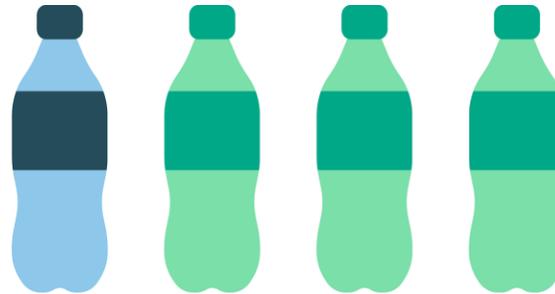
2022



2024

65%

In just two years (2022-2024), recycled PET (rPET) **imports** to the U.S. **rose by over 65%**.
(APR)



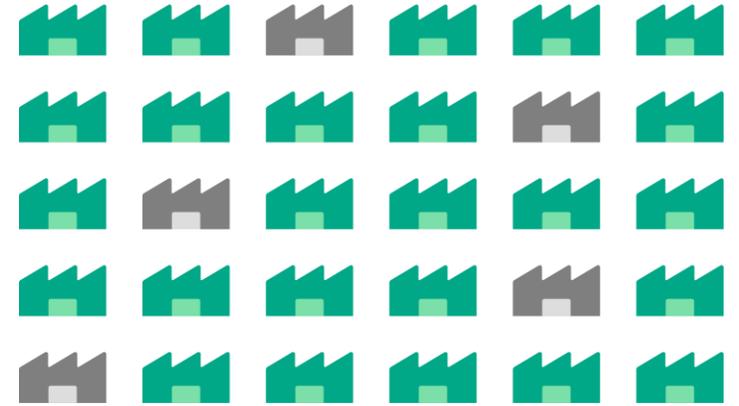
25%

”...of the **recycled PET** used in the US now comes from **overseas sources.**”
(NAPCOR)

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Capacity

In the last 12 months,
5 of the 30
reclaimers in the
U.S. closed.



The result was a
25% loss
in capacity to
Recycle PET



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Q&A Discussion



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The U.S. PET system is at a critical crossroads

Key Takeaways



The PET bottle recycling system is proven and effective.

The system is now at a pivotal moment where it must scale, not stall.



The data is clear. North American reclaimer capacity is in now decline while imports are rising.



The risks are real. And escalating. If end markets can't absorb the material, public trust drops, and program and infrastructure costs rise.



Industry can change the trajectory. Sourcing North American recycled content is the fastest path to keep U.S. recycling economics viable.

Get in Touch:

The Recycling Partnership

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🌐 recyclingpartnership.org



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The Recycling Partnership is the U.S. nonprofit solving recycling's toughest challenges, together.