The Recycling Industry
Where We Are – Where We Need To Be
Great Swamp Watershed Association
Gary Sondermeyer, Vice President of Operations
Bayshore Family of Companies
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When you hear the word “recycle”
Actual Image of Recycling
Significance of “the Chasing Arrows”

Collection

PROCESSING

Marketing
Where it all began – NJ Recycling

- **1982** – “Recycling in the ‘80’s”
- **1987** – Mandatory Recycling
  - “Floor” of Recycling “3 Materials, plus Leaves”
- Glass Containers, Aluminum Cans & Newspaper
- NO ONE Exempt!!!
- Down to “Kitchen Level”
- **1993** Plan and Integrated & Waste Management
- 50% MWS and 60% TWS
  Goals Codified by Legislature
Where Are We Today???

- Recycling Still MANDATORY (Many Forget)
- County-by-County Plans in Place & Current
- 50% and 60% Recovery Goals are Unchanged
- 22.7 Million Tons Generated (2016 Stats)
- 13.91 Million Tons Recycled
- 61% Total Waste Stream Recycling
- 44% Municipal Waste Stream Recycling
- Curbside Recycling VERY Successful
- Commercial/Institutional our Challenge
- Markets for Material VERY Divergent!
RECYCLED MATERIALS:

- Aluminum Cans
- Glass Bottles & Jars
- Steel & Tin Cans
- Plastic Milk, Water, Soda and Laundry Bottles
- Newspaper
- Corrugated CARDBOARD
- Tires
- Motor Oil
- Textiles
- Mixed Paper (Magazines, Office Paper, Junk Mail)
- Leaves
- Brush
- White Goods (Refrigerators, Washers, Dryers)
- Masonry/Paving Materials
- Rechargeable Batteries
What’s Left in the Can After 30 Years of Mandatory Recycling?

- Paper: 21.3%
- Plastics: 16.0%
- Textiles, Rubber, Leather: 10.2%
- Wood: 6.4%
- Yard Waste: 6.0%
- Food Waste: 24.8%
- Other Organics: 3.6%
- Metals: 3.5%
- Glass: 2.4%
- Inorganics: 5.4%
- Hazard Materials/Other: 0.4%
Incredibly Exciting Times!

- **Recycling Markets** are the Most Challenging in History!
  - We have **Unprecedented Media Focus** on Recycling and Plastics:
    - Microplastics Threat – Rutgers Conference in March 2019
    - Single Use Plastic Bans/Fees in 32 Towns (Jersey City & Bayonne)
    - Pending Bans/Fees = 23 more towns (Newark & Edison)
    - Proposed State (S2776/A4330) and Federal/International Legislation
  - **Food Waste Reduction and Recycling** a Primary Legislative Focus
    - S3027 Food Waste Reduction Act: NJDEP Implementation Plan
    - S1206 Passed by Legislature/Governor Vetoed in August
  - Recent Creation of the “**Alliance to End Plastic Waste**” and Pledge to Provide **$1.5 BILLION** to Address the Problem
    (P&G, Shell, Veolia, Suez, Exxon/Mobile, Phillips/Chevron, Dow Chemical, PolyOne, BASF and others)
- **International Pilot** for Reuse by **TerraCycle: LOOP Program**
  (P&G, Nestle, PepsiCo, Unilever, Mars, Clorox, Coca-Cola)
  Toronto, Paris and New York City Started in May!!!
SO.....What’s the Problem???

• Most New Jersey Towns have Gone to “Single Stream” v. “Dual Stream” Collection – Leads to VERY High Contamination and Compromised Markets
• **International Market Restrictions** from China – Green Fence & Green Sword
• **Recycling is Confusing** – Plastics Recycling is NUTS!!!
• **“Wishful Recycling”** – EVERYTHING is recyclable!!!
• Total Disconnect between “Supply and Demand” – we Got the Stuff – Too Few Markets to Send it to!
• **Economics of Recycling** have Left the Building - In a Few Years Towns Went from “Getting Paid” to “PAYING” $75/Ton + North!
• Long Lead Time Necessary to **Restore Domestic Markets**.
• International Tariff Wars Won’t Help Markets!
SO......What Can We Do?

- Additional Single Use Plastics Bans;
- Stepped up Education & Enforcement Related to Contamination;
- State Leadership (State Plan/County Planning Initiative);
- Incentives for Development of Domestic Markets – Business Recycling Loans as in Years Past;
- Standardization of Materials (Hard Look at 3 – 7 Plastic & Glass);
- Do we go back to Dual Stream? (California Assembly Bill 815);
- Need a Statewide Markets Development Council;
- We Must Reactivate the State SWAC;
- Critical to have a Statewide Dialogue!
- Executive Orders on Procurement & Recycling?
- Joint Legislative Hearing August 15th
Concluding Thoughts

• Please remember that recycling is extremely complex!
• Recycling is the Floor of the NY Stock Exchange – Pricing Varies Daily!
• Profits and Cost Avoidance (Paying for Recycling) Both at Play
• We Monitor Markets in Some 20 Commodity Categories. Plastic Alone:
  - PET: Clear Water Bottles
  - HDPE Natural: Milk Containers
  - HDPE Color: Laundry Detergent Containers
  - LDPE Film Natural: Dry Cleaner Bags
  - LDPE Film Colored: Clothing Bags
  - Mixed Rigid: Spackling Buckets, Kids Toys
  - Other 3 – 7 Plastic: Yogurt and other Containers
  - PVC: White and Dark Piping, Etc.
• Markets Will Recover VERY Slowly Over Years
• Days of “Getting Paid” are Over in Near Term/ Perhaps Longer
• We MUST Reestablish Domestic Markets