



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”

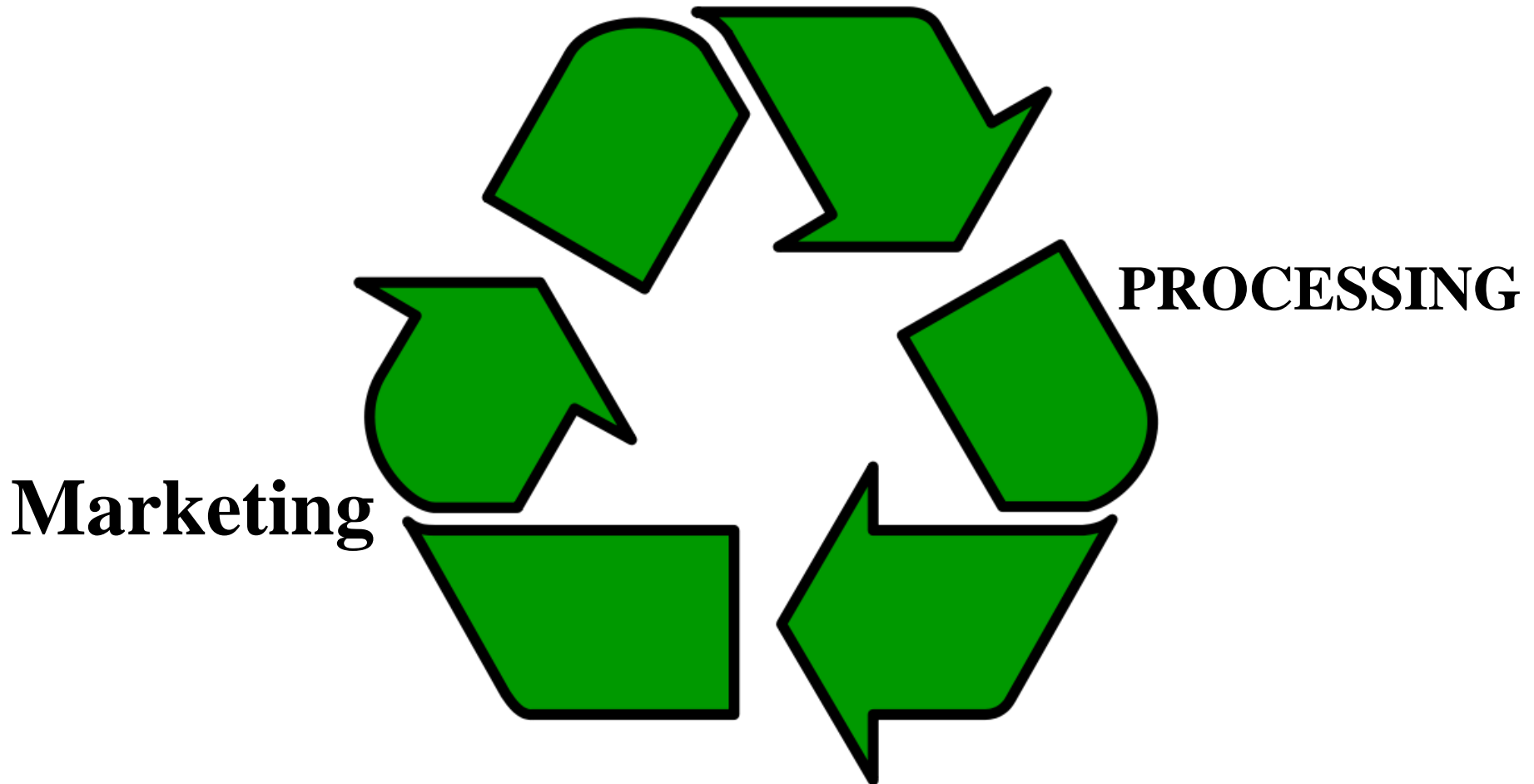


Actual Image of Recycling



Significance of “the Chasing Arrows”

Collection



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!

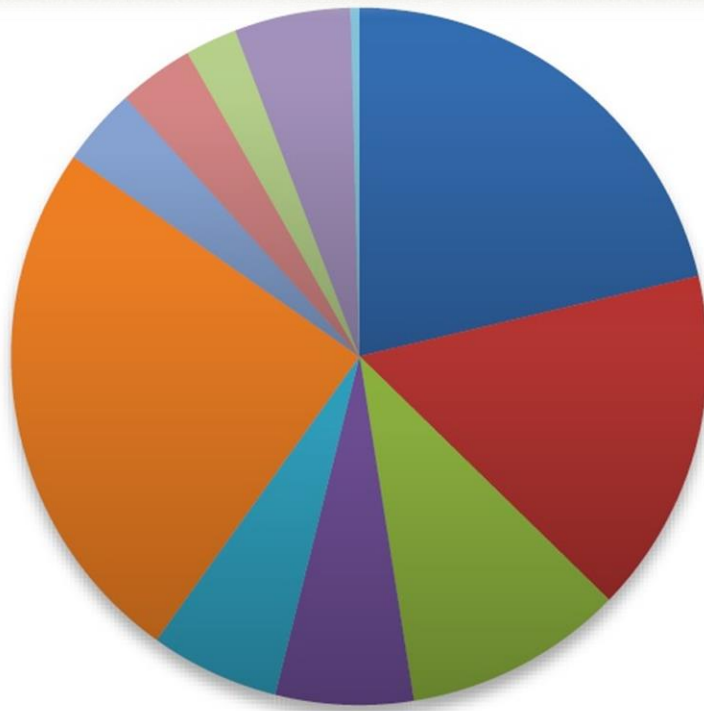


RECYCLED MATERIALS:



- 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

