

Pioneer Level Mission Partners



Anchor Level Mission Partners



Pillar Level Mission Partners



STAR

State of Texas Alliance for Recycling

2020

Mission Partners

Foundation Level Mission Partners



Advocate Level Mission Partners

Himes Service Co.
City of San Marcos
FCC Environmental
Goodwill San Antonio

Liberty Tire Recycling
Rehrig Pacific Company
The Recycling Partnership
Universal Recycling Technologies

The Woodlands GREEN
Texas Tech University
Houston Computer Recycling
The Woodlands Township



RECYCLING MARKET
Development Plan

Plan Background and Purpose

Background

- Created by legislation (Senate Bill 649) from the 86th Texas Legislative Session (2019)
- Builds on prior Texas recycling studies such as the Study on the Economic Impacts of Recycling (SEIR) by examining in more detail Texas recycling industry and use of recycled materials
- Through a competitive bidding process, TCEQ retained Burns & McDonnell and Circular Matters to complete the project.

Purpose

- To assess current recycling activity in Texas and to examine the economic impact of the recycling industry throughout Texas
- To develop a recyclable materials market development plan to stimulate increased use of recyclable material feedstocks, increasing the economic and environmental benefits for Texas businesses, citizens, and governmental agencies
- To produce educational material for the Take Care of Texas campaign

BURNS  MCDONNELL

 **Circular Matters**

 **STAR**

 **TEXAS COMMISSION ON ENVIRONMENTAL QUALITY**

Re-TRAC
 **CONNECT**



Recycling Industry Committee

Roles

- Represent the recycling industry for specific commodity/sector
- Expansive network of material processors and end-use/manufacturing facilities
- Subject matter experts

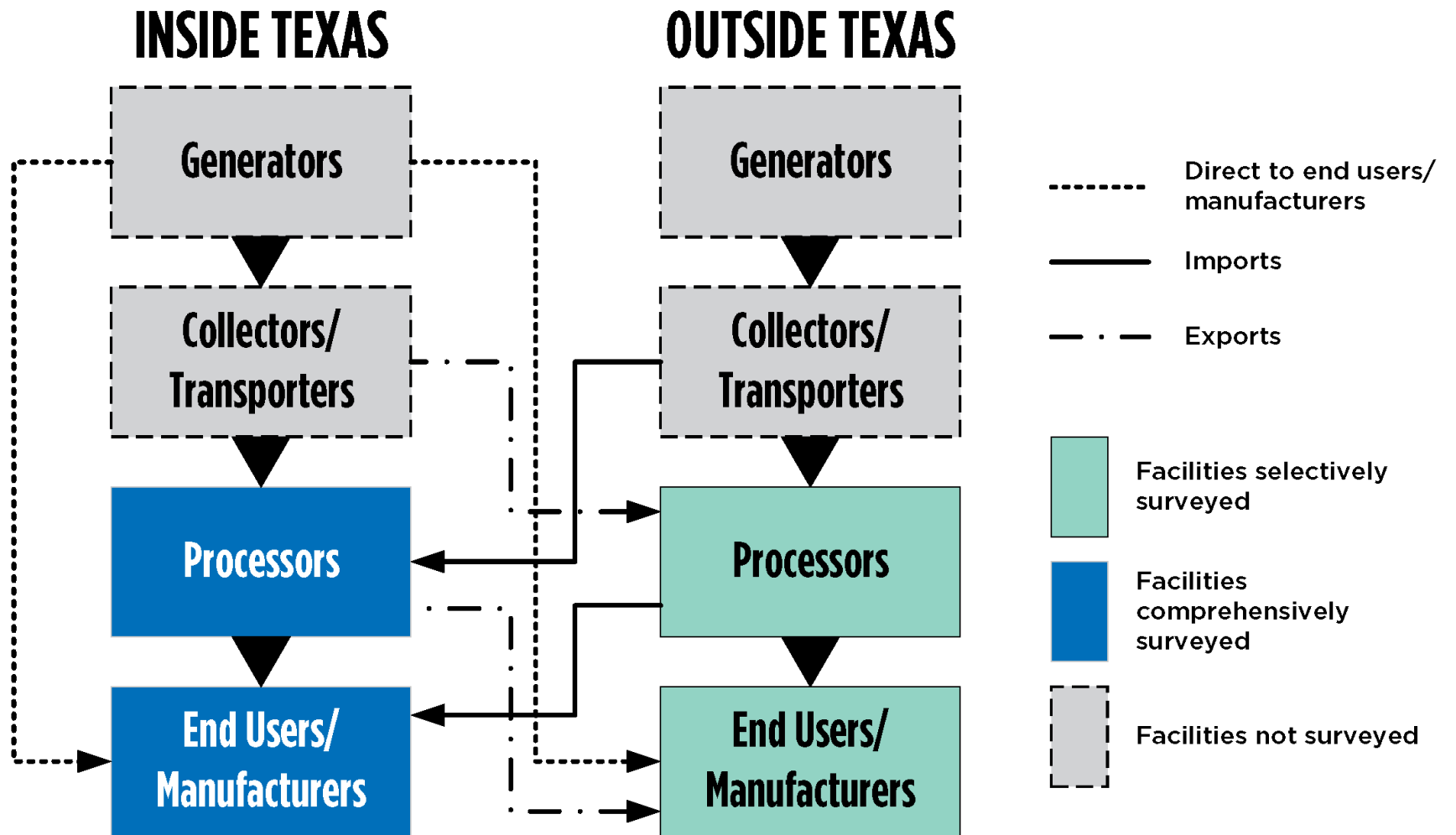
Responsibilities

- Assist the Project Team in identifying all/primary facilities
- Promote the survey through networks
- Serve as subject matter experts
- Provide input regarding barriers, opportunities and strategies for addressing them

Recycling Industry Committee

- ▶ Aluminum Association
- ▶ American Beverage Association
- ▶ American Forest & Paper Association (AF&PA)
- ▶ AMERIPEN
- ▶ Carton Council
- ▶ Construction & Demolition Recycling Association (CDRA)
- ▶ Environmental Protection Agency (EPA)- Reg. 6
- ▶ Glass Packaging Institute (GPI)
- ▶ Governor's Office of Economic Development and Tourism
- ▶ Institute of Scrap Recycling Industries (ISRI)
- ▶ ISRI Tires/Rubber Division
- ▶ Keep Texas Recycling (KTR)
- ▶ National Association for PET Container Resources (NAPCOR)
- ▶ National Waste & Recycling Association- TX Chapter (NWRA)
- ▶ North American Hazardous Materials Management Association (NAHMMA)
- ▶ Office of Rep. Thompson (ex-officio)
- ▶ Office of Senator Zaffirini (ex-officio)
- ▶ Plastics Industry Association
- ▶ Solid Waste Association of North American - Lone Star Chapter (TxSWANA)
- ▶ STAR Business Council
- ▶ STAR Texas Compost Council
- ▶ TCEQ MSWRRAC
- ▶ Texas Association of Business (TAB)
- ▶ Texas Association of Manufacturers (TAM)
- ▶ Texas Association of Regional Councils (TARC)
- ▶ Texas Chemical Council (TCC)
- ▶ Texas Retailers Association (TRA)
- ▶ Association of Plastic Recyclers
- ▶ The Recycling Partnership

Recyclables Material Chain



About the Survey

- For both **MSW** and **Industrial** materials recycling processors and end users
- Voluntary online survey
- Addresses business-sensitive information via a confidentiality plan accompanied by a non-disclosure agreement
- Hosted by Re-TRAC
- Burns & McDonnell will provide on-demand survey support
- Open June 1st through August 31st
- SEIR respondents will have access to their 2015 data submissions

What Materials are Included?

Processors and End-Users handling the following material:

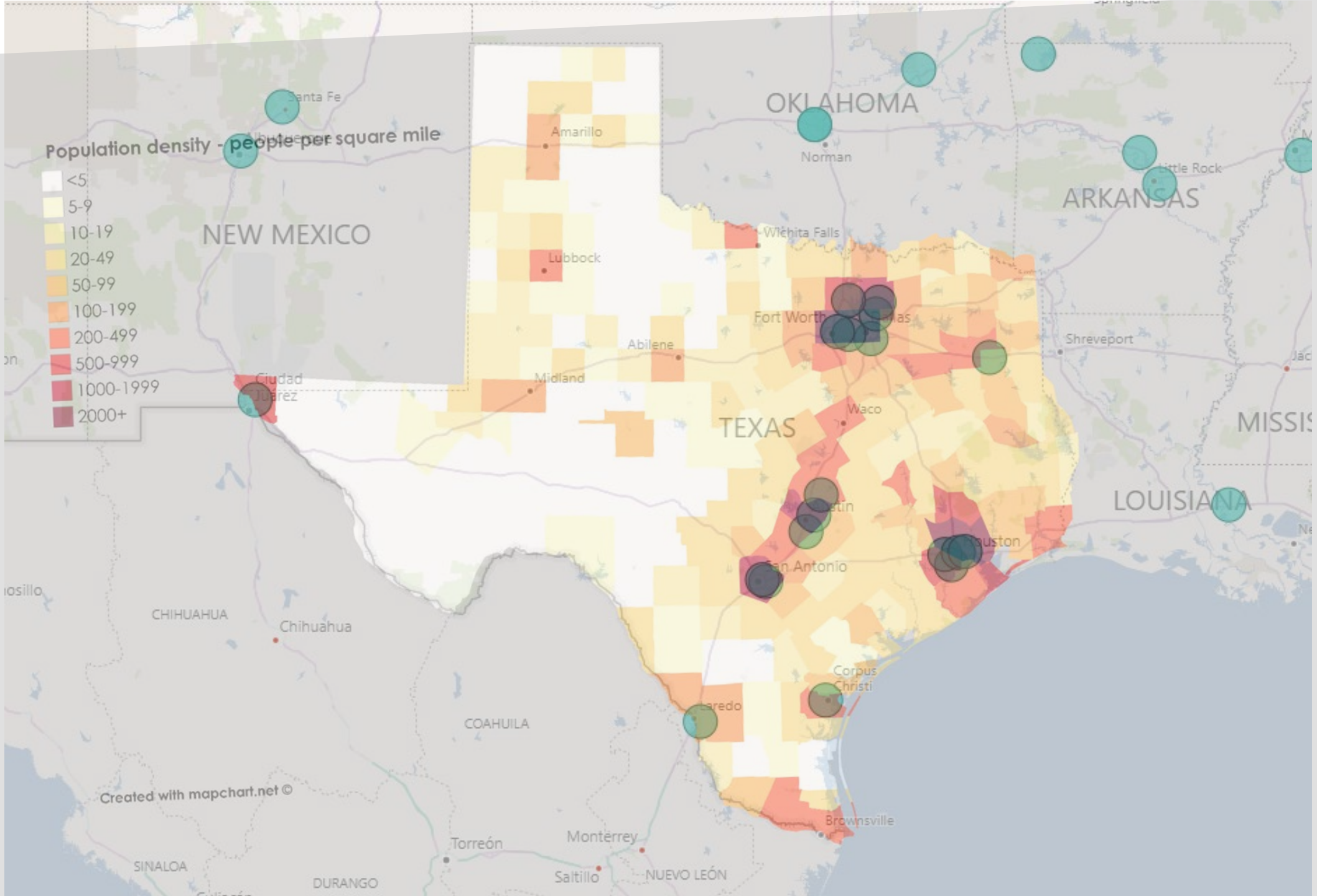
- ▶ Paper
 - Mixed
 - OCC
 - Office paper
 - Other Paper
- ▶ Plastics
 - #1 PET
 - #2 HDPE
 - Plastic Film
 - Plastics #3-7
- ▶ Glass
 - Containers
 - Other Glass
- ▶ Metals
 - Ferrous and Non-Ferrous
- ▶ Electronics
- ▶ C&D Materials
- ▶ Textiles
- ▶ Tires
- ▶ Paint and Related Wastes
- ▶ Batteries
- ▶ Organics
 - Bio-solids
 - Food and Beverage Materials
 - Green Waste (includes brush and yard waste, crop residue)



Market Development Approach

- Complete supply and demand analysis for each commodity and determine needs/gaps and priorities for recycling market development support
- Hold stakeholder forums to review findings and gather input
- Identify market barriers, infrastructure needs and market development opportunities
- Determine recycling market development strategies for potential implementation in Texas by state and local governments
- Develop institutional, administrative and funding recommendations

Population density - people per square mile



Created with mapchart.net ©

How is this plan different than the 2017 Study of the Economic Impacts of Recycling (SEIR) effort?

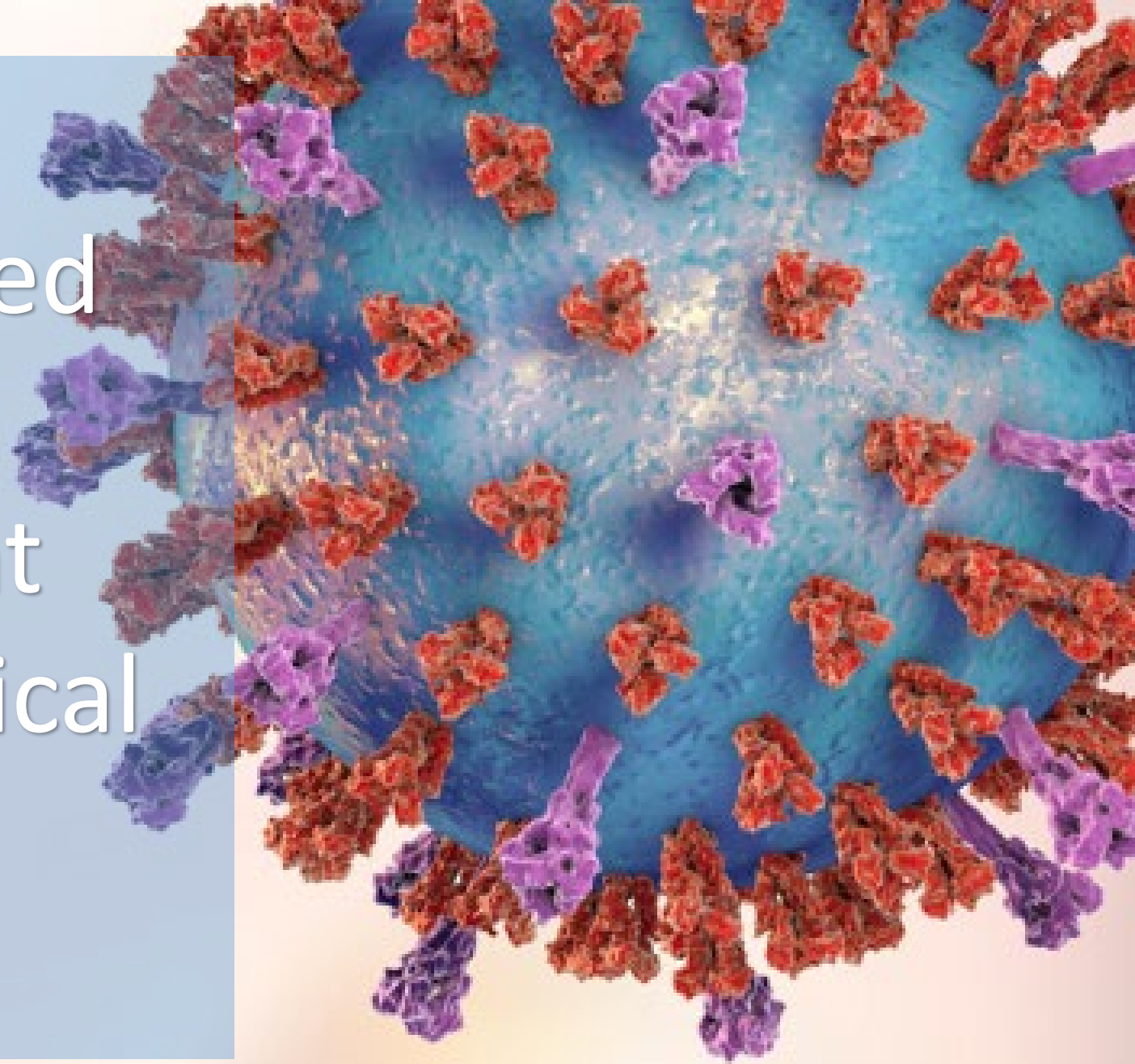
SEIR provided a baseline recycling rate and limited job information.

This plan intends to utilize the methodology of SEIR, with a focus on the economic impacts of the recycling industry in Texas, and additionally develop a plan to stimulate the use of recycled materials as well as a comprehensive educational campaign about recycling and contamination reduction.

Lastly, the Recycling Market Development Plan will not only document current recycling efforts, but it will also provide useful information such as:

- What materials are generated but not being recycled;
- The economic benefits of recycling;
- The available capacity of existing manufacturers to use sorted recyclables as raw materials;
- What is preventing the use of recyclable materials to make new products, and solutions to remove barriers;
- Companies or facilities needed to ensure generated recyclable materials are used to make new products; and
- Recommendations for increasing use of recyclable materials overall and growing the number of companies that consume recyclables as feedstock.

- 1) Workers are regularly exposed to dangers
- 2) PPE is important
- 3) Recycling is critical to American manufacturing



Plastics collection cuts prompt supply concerns

Posted on March 25, 2020

by [Colin Staub](#)

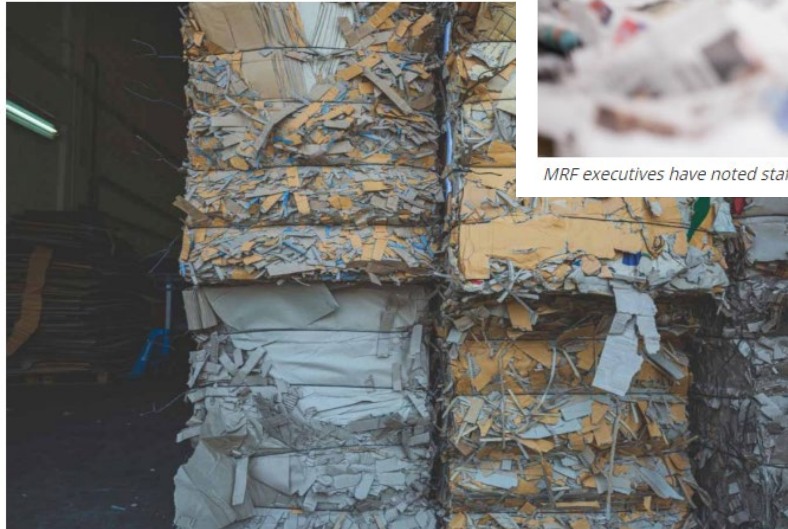


Recycled paper mill to idle due to drop demand

Posted on April 7, 2020

by [Colin Staub](#)

In communities around the country, workers are altering service hours or



Packaging Corporation of America is a major end user of recovered paper in the U.S. | [noomcpk/Shutterstock](#)

Amid pandemic, MRFs face new worker safety challenges

Posted on April 7, 2020

by [Colin Staub](#)



MRF executives have noted staffing and procedural changes to deal with the coronavirus.

Virus leads to program changes across North America

Posted on March 24, 2020

by [Colin Staub](#)



ngs 'uncontrollable challenges'

aterials they collect.
erstock



Republic forecasts servicing fewer commercial containers as bars, restaurants and schools temporarily close. | [Aaron of L.A. Photography/Shutterstock](#)

U.S. Oil Price Collapses To Lowest Level Since 1999

Daily price per barrel of WTI crude oil (dollars per barrel)*



* West Texas Intermediate (a benchmark for U.S. crude oil prices)

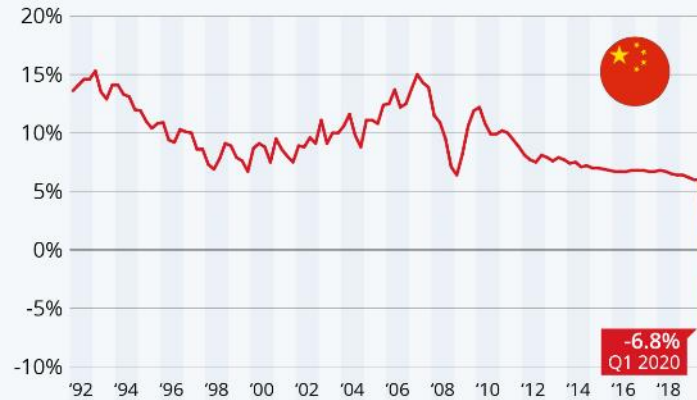
Source: U.S. Energy Information Administration



statista

Chinese Economy Shrinks For the First Time

Quarterly real GDP growth of China (year-over-year; seasonally adjusted)



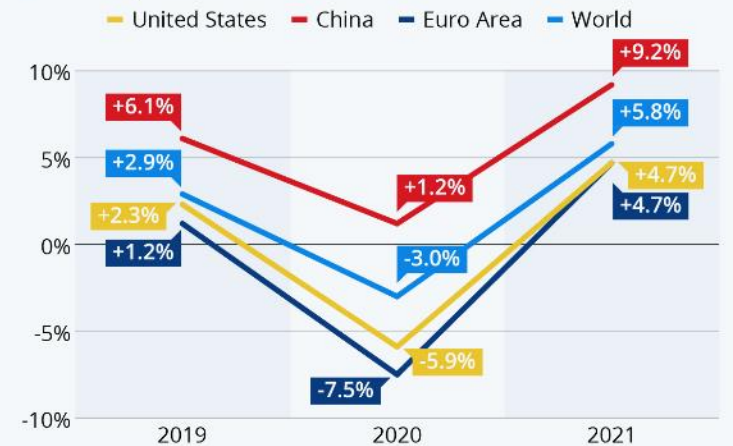
Sources: National Bureau of Statistics of China, OECD



statista

Hoping for a V-Shaped Recovery

GDP growth forecast for selected economies (as of April 2020)



Source: IMF



statista



Recycling collection & processing is an essential public service.



Keep Recycling, Texas!

RECYCLINGSTAR.ORG



STAR RECYCLING TIPS

recycle right, Texas.

CONTINUING TO RECYCLE IS VERY IMPORTANT DURING THE COVID-19 PANDEMIC.

RECYCLED GLASS IS USED TO MAKE NEW PACKAGING AND OTHER USEFUL MATERIALS. AND, GLASS IS INDEFINITELY RECYCLABLE AND CAN BE BACK ON STORE SHELVES IN AS LITTLE AS 30 DAYS AFTER BEING RECYCLED!

KEEP RECYCLING, STAY SAFE, AND RECYCLE RIGHT, TEXAS.



STAR RECYCLING TIPS

recycle right, Texas.

CONTINUING TO RECYCLE IS VERY IMPORTANT DURING THE COVID-19 PANDEMIC.

RECYCLED PLASTIC BOTTLES ARE USED TO MAKE NEW PACKAGING AND OTHER USEFUL MATERIALS.

KEEP RECYCLING, STAY SAFE, AND RECYCLE RIGHT, TEXAS.



STAR RECYCLING TIPS

recycle right, Texas.

CONTINUING TO RECYCLE IS VERY IMPORTANT DURING THE COVID-19 PANDEMIC.

RECYCLED PAPER AND CARDBOARD BOXES ARE USED TO MAKE NEW PACKAGING AND OTHER USEFUL MATERIALS. REMEMBER TO BREAK DOWN BOXES BEFORE RECYCLING THEM.

KEEP RECYCLING, STAY SAFE, AND RECYCLE RIGHT, TEXAS.



STAR RECYCLING TIPS

recycle right, Texas.

DISPOSABLE GLOVES AND MEDICAL MASKS DO NOT BELONG IN YOUR RECYCLING CART, OR ON THE GROUND.

DISPOSE OF THEM IN YOUR TRASH BAG. PROTECT SANITATION WORKERS BY CLOSING THE BAG BEFORE PUTTING OUT FOR PICKUP.



STAR RECYCLING TIPS

recycle right, Texas.

CONTINUING TO RECYCLE IS VERY IMPORTANT DURING THE COVID-19 PANDEMIC.

RECYCLED METALS ARE USED TO MAKE NEW PACKAGING AND OTHER USEFUL MATERIALS. ALUMINUM IS INDEFINITELY RECYCLABLE AND CAN BE BACK ON STORE SHELVES IN AS LITTLE AS 60 DAYS AFTER BEING RECYCLED.

KEEP RECYCLING, STAY SAFE, AND RECYCLE RIGHT, TEXAS.



THANK YOU!

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