Plastics Market: Collecting for Value

Tonya Randell, More Recycling NRC Webinar April 18, 2017



More Recycling is the Next Generation of Moore Recycling Associates

- Have nearly 20 years of research and consulting experience in the recycling of postconsumer materials, specifically plastics.
- Offer a deep understanding of the complex and everchanging lifecycle of plastic packaging
- Serve as a liaison between industry, public agencies, and NGOs and prioritize accurate information and neutrality in the marketplace.





Introduction & Value Chain

Why Quality Pays:

Market Drivers & Influences Specific Commodities

How to Collect for Quality:

Clear Terminology Dealing with Plastic Film

Resources



Recycling is a Business

Like all manufacturing, Plastic Recycling must...



Source: Dave Cornell

Considerations

Know your Material

Know your Market

- Not all Plastic Plastics are Created Equal
- Readily Recyclable vs. Not
- Contaminants
- Post Industrial
- Post Commercial
- Post Consumer



- Direct vs. Broker
- Specs
- Price Influences
- END USER IS KEY







The Evolution of Packaging



Plastic Film Value Chain

Collection Consolidation Reclamation End Use



Collection

Examples: Haulers, Retailers, Institutions





Consolidation

Examples: Brokers, MRFs, Distributors, Scrap Dealers



Reclamation

Examples: Pellets & End Products









End Markets

Examples: Bottles, Pipe, Bags & Sheeting, Composite Lumber











Plastics Market Drivers

- General economic conditions
- Price of natural gas, petroleum & derivatives
- Virgin resin production capacity relative to demand
- Industrial scrap & off-spec supplies
- Supply and demand of recycled feedstock
 - Goals for recycled content



Current Economic Conditions

Strong Dollar

- + Excess Production of Crude & Other Commodities
- + Changes in China/Asia
- + Increased Processing Costs

Down Market Tight Margins Industry Pains/Constraints Quality sells



Domestic vs Export Data

U.S. Postconsumer Plastic Recycling





Plastic Scrap Price vs Oil



RECYCLING

Specific Commodities

PET Bottles & Thermoforms HDPE Bottles Non-Bottle Rigids Polypropylene Bottles & Containers Polystyrene Bags & Film



PET Recycling

- Recycling Rate: 30.1%*
- Lightweighting affects yields
- Bale yield mid-60% to mid-70%
- Flattening bottle demand
- Lower PCR demand
- Virgin resin capacity

*2015 data

PET 2015 U.S. Reclamation Capacity vs Collection 1.20 1.00 0.80 ហ្ស៊ាion Metអ្វី Tonnes 0.20 0.00 Capacity Collected



PET Thermoform Challenges

- Intrinsic property differences
- Aggressive labels
- Sorting difficulties
- Black plastic
- Not all haulers/MRFs/ reclaimers want them







PET Bottle* Movement

PET Materials Flows in the US





HDPE Bottles

- Recycling Rate 34.6% in 2015
- Right-sizing of bottles
- Bale yield at nearly 82%



RECYCLING



Non-Bottle Rigids

U.S. Non-Bottle Rigid Plastic Recovered Year to Year by Resin² (pounds)



Polypropylene

- Recycling rate is growing for both bottles and containers/caps
- Opportunity to expand collection?
- Demand for material continues to grow
- PRFs/Secondary MRFs support growth of processing









Polypropylene Map

www.RecycleMorePlastic.org/plastics/map.html



Polystyrene

- Domestic Markets exist
- Densification is essential
- Easily identifiable
- Grants available from Foodservice Packaging Institute



Polystyrene

Foam PS Recycling Works at MRFs

Spotlight on EDCO Disposal

Spotlight: EDCO Disposal

Case Studies and Map available: www.RecycleMorePlastic.org



	Curbside Transportation Packaging	Curbside Food Packaging	Curbside Both	Drop-off Transportation Packaging	Drop-off Food Packaging	Orop-off Both
	Map Satellite	68		ONTARIO	QUÉBEC	
		HINGTON	MONTANA NORTH	00		
		OREGON	0 WYOMING			AINE NOVA SCOTIA
	c	NEVADA	UTAH COLORADO KAI	SKA - IOWA	o friadelpi v Philadelpi	hia
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Plastic Film Scrap Prices





Collect For Value

Clear Terminology

"Return to Retail" Message for Film and Bags



Plastics Recycling Terms



Better Terminology = Better Recycling

RECYCLING

The Terms and Tools

Goal: Increase the quality and quantity of plastics collected and to facilitate better tracking.

Outreach Terms: Common terminology and simple tools for community recycling programs in the US and Canada to help these programs communicate more effectively to residents about plastic recycling.

Commodity Terms: Streamline communications about buying and selling plastics that have been collected in the plastics value chain.



Quality and Quantity: The Local Challenge



A Solution:



Outreach Terms:

- 4 easy steps to build your
- program with Images and
- Tool to build program flyer.



RecycleYourPlastics.org

Terms and Tools

Terms & Tools Home | Feedback | login



Plastics Recycling Terms & Tools

Better Communication... Better Recycling

This resource provides common terminology to help streamline communications for community recycling programs throughout the U.S. and Canada. Its goals are to strengthen consumer education and increase the quantity and quality of plastics recycled.

Click each section below in succession to learn more

Overview

1	What are the Terms & Tools?	+
2	Who created the Terms & Tools?	t
3	Why every community should use the Terms & Tools	÷

How to Use the Outreach Terms

4	Before/After Example Using the Outreach Terms	+
5	Tool: Use the New Outreach Terms	÷
6	The Plastics Recycling Outreach Terms (complete list)	÷

Additional Outreach Resources/Tools

7	Image Gallery: A picture is worth a thousand words	+
8	Further Your Outreach with Re-TRAC	+
9	Plastic Film & Bag Recycling	+

Definitions

Categories are defined for easy usage.

Plastic Soda, Water & Other Drink Bottles

Soda, water, juice and other beverages - Commonly marked: PET (1), HDPE (2), PP (5), Other (7)

Plastic Food & Household Bottles/Jars

Screw top bottles/jars - For Example: Food: ketchup, peanut butter, mayonnaise, mustard, Household: laundry detergent, shampoo, and cleaning products – Commonly marked: PET (1), HDPE (2), LDPE (4), PP (5), Other (7)

Plastic Tubs

Tub containers, such as: yogurt, margarine, ice cream tubs, coffee containers: Commonly marked: HDPE (2), LDPE (4), PP (5)

Plastic Tubs & Lids

Tub containers and lids for items such as: yogurt, margarine, ice cream tubs, coffee containers – Commonly marked: HDPE (2), LDPE (4), PP (5)

Plastic Produce, Deli & Bakery Containers, Cups, Trays

Take-out, deli, bakery, berries/produce containers, cookie trays, cake domes, party cups, clear egg cartons – Commonly marked: PET (1), PP (5), PS (6), Other (7)

Plastic Non-food Containers & Packaging

Containers and packaging for non-food items such as: flower pots, small storage containers like tupperware, CD/DVD cases, clear formed plastic packaging around products like toys or hardware and electronics (paper components should be removed) – Commonly marked: PET(1), HDPE (2), LDPE (4), PP (5), PS (6), Other (7)

Plastic Bulky Items

Items as large as or larger than a 5 gallon bucket, such as: drums, large water bottles, crates, large storage bins, baskets, totes and lawn furniture – some may be marked: PET (1), HDPE (2), LDPE (4), PP (5), Other (7)

Plastic Toys

Plastic Toys without metal or electronic components. For Example: Slides, play kitchen, sand bucket and shovel, flying disk, bat & ball

Plastic Buckets 5 gallon buckets, kitty litter buckets – Commonly marked: HDPE (2), PP (5)

Plastic Flower Pots Rigid flower pots, 4 inches or larger – Commonly marked: HDPE (2), PP (5)

Plastic PET (1) Bottles & Jars

Screw top bottles/jars that are marked PET (1) - For Example: Beverage - soda, juice, water and other beverages, Food - ketchup, peanut butter, mayonnaise, mustard, Household - shampoo, cleaning products

Plastic PET (1) Containers & Lids

Take-out and other containers, lids, cake domes and trays used to package items such as fresh produce, baked goods, nuts, and deli items; and clear cups that are marked PET (1)

Create Your Own Flyer

- Pulls in
 - Program selections
 - Image selections
- Add
 - Logo
 - Community info
 - Contact info

Recycle More Plastic

PLEASE RECYCLE:

Plastic Bottles & Containers

- Plastic Soda, Water & Other Drink Bottles
- Plastic Food & Household Bottles/Jars
- Plastic Tubs & Lids
- Plastic Produce, Deli & Bakery Containers, Cups, Trays
- Plastic Non-food Containers & Packaging
- **Plastic Buckets**

OH AND BY THE WAY...

* Empty, flatten and put caps back on bottles/jars * Rinse or wipe clean all food or other residue from bottles & containers

EXLUSIONS:

No Containers that held Hazardous Products No Bags, Wrap or Film Plastic No Foam











For more information contact: Tonya Randell,

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Image Gallery

- **Royalty-free**
- Acceptable items and exclusions
- Provided in JPEG, TIFF, and EPS
- EPS allows for easy layering



Image Gallery

These images are royalty-free and can be downloaded and used as needed.

Plastic PET (1) Bottles & Jars





Download formats: JPEG: 92 KB

EPS: 12.2 MB TIFF: 9.2 MB



Image Title Screw-top bottles for other beverages

Download formats: JPEG: 92 KB

EPS: 12.2 MB TIFF: 9.2 MB



Image Title Screw-top bottles for other beverages

Download formats:



Image Title Screw-top bottles for soft drinks, ice tea and other beverages

TIFF: 9.2 MB

Download formats JPEG: 92 KB EPS: 12.2 MB



Image Title

soft drinks, ice tea and

other beverages

Download formats:

JPEG: 92 KB

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Image Title Screw-top bottles for other beverages

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Image Title Screw-top bottles for soft drinks, ice tea and other beverages

Download formats:

JPEG: 92 KB EPS: 12.2 MB TIFF: 9.2 MB



Image Title Screw-top bottles for other beverages

Download formats:





Commodity Terms: Communications with MRFs and Markets



Why Use the Commodity Terms?

"Waste Management recognizes the importance of communicating with one voice - to communities and their residents about what to put in the bin, and with markets about what is being sold. Common terminology helps us achieve that goal."

Susan Robinson, Sr Public Affairs Director, Waste Management





Better Tracking: Consistent Terms = Consistent Data









Better Tracking: Critical Plastics Data



Availability of Recycling (PP Tubs & Containers)

Bale Audits & MRF Studies



Better Tracking: Critical Plastics Data



Sources for Non-Bottle Rigid Plastic



Annual Plastic Recycling Reports



Find and USE the Terms & Tools



www.RecycleYourPlastics.org/termsandtools

www.RecycleYourPlastics.org/commodityterms



Bags & Film

- "Return to Retail:" Discourage curbside collection
- More than 18,000 drop off locations
- Many opportunities to improve commercial collection
- Growing use of How2Recycle Label



Historical Film Scrap Price



Retail Collection vs. Curbside

- Pro: Retail collection keeps material clean, dry, and *valuable* for end markets
- Pro: Takes advantage of existing, efficient infrastructure
- Con: Have to take material elsewhere; easier to put in trash or bin anyway?
- Final- Quality pays; use of existing infrastructure improves efficiency

- Pro: Curbside collection is easy for consumers
- Con: Problematic for MRFs– reducing efficiency for ALL commodities
- Con: Generally too dirty for domestic processing and very expensive to clean.

Final- No markets currently to justify extra cost of washing/handling to recycle this material.





NOT in Curbside Recycling



US Retail/Drop-offs Locations

United States Map of All Drop-Off Facilities



WRAP can Help

- •Provide alternative solutions for film and bags- NOT curbside bins/MRFs
- •Maximize material quality- for film *and* other commodities
- •Protect local environment
- •Support your sustainability goals

What is WRAP?

Wrap Recycling Action Program (WRAP) Free and Voluntary public education & outreach initiative, led by the Flexible Film Recycling Group (FFRG).

Seeks to engage motivated partners nationwide

Goal: Double film recycling by 2020 through *return to retail and drop off collection and greater commercial access.*

Objectives:

- Dramatically increase film recycling by:
 - Forging partnerships with key allies/stakeholders
 - Providing essential educational tools & programs
 - Gather data to improve tools and information

WRAP Tools

Recycle Plastic Film Beyond Bags

Find drop off locations in you

CONNECTING BUSINESS

RECYCLING SERVICES PROVO

ar are

Look for all locations

Recycle clean, dry plastic bags, film and wrak

ating stores

Case Wrap (e.g. snacks beverage cas

NO BAGS OF BAGS

IN THIS CART!

Dry Cleaning Bage

RECY

film

RECYC

Malls and Retail Centers

Thank you for your interest in setting up a plastic film recycling program

pallets wrapped with plastic film because it protects

during shipping from contamination like dirt and reakage and otect inventory from shrinke Why Recycle Film Plastic?

nart recycling practices. Cus re too, and live to feel good about where they shop. But

, recycled plastic film has a market value - there's a strong domesti market for this material to make things like or lumber. Within retail centers, there is a significant amount of flexible plastic film. Therefore, a well-designer program to collect and sell good quality plastic film to recyclers can offset operating costs, pote anue for a mail management entity, and ntially onn

Keeping the film CLEAN, DRY and CONTAMINANT

FREE is vital to recycling this material. Recyclers

your recycling bins to protect the quality of your

say that it is essential to keep the follow

Crinkley gradable bags and filr

Any material other

ape, naner ei

Plastic film is thin polyethylene packaging or commercial/netail use bags. It is plastic used for wraps sometimes called stretch film or shrink film. Most plastic or #4 LDPE mark. Com

Furniture and and had

Bubble

plasticfilmrecycling.org

plasticfilmrecycling.org

Where can I recycle plastic bags and wraps? At store drop-off locations!

0

directory

Resources

Bale Specs Directories Tools Value Chain Case Study Links

Putting the Pieces Together

Bale Specs

- ISRI
- APR
- Individual Buyers
- Work to streamline grades, types, and language-Plastic Terms & Tools
- Knowing what your buyers want is the most important spec

Mixed Bulky Rigid Plastics

This grade primarily consists of non-bottle PE and PP bulky rigid plastic items such as plastic drums, crates, buckets, baskets, toys, refuse totes, and lawn furniture typically collected ina residential recycling MRF. This grade should not contain any mixed 1-7 bottles and containers. **Product:** Mixed household items

Source: Postconsumer material

Contamination: Total allowed-2% listed below

-Non-specified plastic or non-plastic material General: Refer to the General Information section for more information.

Mixed Color HDPE Buckets

Shall consist of HDPE buckets and "pail-grade" 5-8 melt-injection-grade HDPE recovered from any residential, construction, or commercial application. Original product such as paint or food must be emptied from unit, but dry surface residue is allowed. Metal handles are acceptable. Standard bale will include white or other colored 5-gallon buckets. **Product:** Buckets recovered from a sorting facility

Source: Residential and commercial materials

Contamination: Total allowed-5% listed below

-Other types of HDPE containers or bottles -Large rigid plastics such as crates, drums, toys, lawn

furniture, etc.

-Nonspecified plastic or nonplastic material such as metal, paper, or glass.

General: Refer to the General Information section for more information.

Mixed Color HMW HDPE Drums

Shall consist of high-molecular-weight HDPE drums or barrels recovered from any commercial application. Original product such as solvents or chemicals must be emptied from the unit, and the unit must be rinsed in accordance with federal and state regulations prior to baling. Plastic lids and spouts are acceptable. Standard bale will include blue, white, or other colored 55-gallon drums.

Source: Commercial materials Contamination: Total allowed-2% listed below

-Other types of HDPE containers or bottles

-Large rigid plastics such as crates, buckets, pails, toys, lawn furniture, etc.

-Nonspecified plastic or nonplastic material such as

The following items are not allowed: HMW drums or 55 gallon drums; metal on toys; pallets with metal; film and bags; wood; glass; or electronic scrap.

Refer to the "Prohibited Material" section for more information. General: Refer to the General Information section for more information.

Tubs and Lids Without Bulky

Description: Any whole container with a #2 HDPE, #5 PP, and/or #4 LDPE resin code generated from a positive-sort curbside, drop off, or other public or private recycling collection program. Tubs are containers that have a neck or mouth similar in size to its base. Lids are caps for tubs that have a fastening feature other than threads. Examples include yogurt cups, margarine tubs, ice cream tubs, and cold drink cups (transparent, cold serve). Nursery pots are not acceptable. Bulky rigid plastics are not allowed. Product: Tubs and lids.

Source: Postconsumer material generated from a curbside, drop off, or other public or private recycling collection program. Contamination: Total allowed–10% by weight.

-#1 PET bottles:

- -#1 PET or #3 PVC thermoform packaging;
- -#2 HDPE pails and buckets;
- -#3 PVC (polyvinyl chloride);
- -#6 PS (polystyrene);
- -#7 Other;
- -Paper;
- -Liquids.

The following items are <u>not</u> allowed (0% allowed): Film and bags; metal handles; wood; glass; or electronic scrap. Refer to the "Prohibited Material" section for more information. **General:** Refer to the "General Information" section for more information.

Tubs and Lids With Bulky

Description: Any whole container, with a #2 HDPE, #5 PP, and/or #4 LDPE resin code generated from a positive-sort curbside, drop off, or other public or private recycling collection program. Tubs are containers that have a neck or mouth similar in size to its base. Lids are caps for tubs that have a fastening feature other than threads. Examples include yogurt cups, margarine tubs, ice cream tubs, and cold drink cups (transparent, cold serve). Nursery pots are not acceptable. Bulky rigid plastics are allowed. Product: Tubs and lids.

Directories

http://www.plasticfilmrecycling.org/s04/s04_getlisted.html

www.plasticsmarkets.org/recycle/viewsearch.html

http://www.plasticfilmrecycling.org/plasticbag/s11_pcrdirectory.html

Tools

Plastic Bottles and Containers

EXPLORE MORE

WHAT IS IT USED FOR?

Bottles for beverages (e.g., milk, water, juice and soda), foods (e.g., peanut butter, ketchup, mustard, mayonnaise), household detergents, and **toiletries** (e.g. shampoo, body wash, mouthwash, lotion, medicine). Containers for yogurt, cheese and deli and dairy products. And caps and lids.

WHY IT WANTS TO BE RECYCLED.

Used plastics are valuable resources, versatile and adaptable to many uses. There is a wide market for your recycled plastic bottles and containers. Recycling your plastics helps keep valuable materials out of landfills and helps reduce energy use and emissions.

Value Chain Case Study

- COMING SOON!
- Resource for all parts of the Recycling Value Chain
- Case studies, reports, tools
- Highlights recycling successes

SPOTLIGHT CASE STUDY

Trex

Trex

Reclamation

WHO?
Reclaimer, Manufacturer

Reclaimer, N

0 WHAT?

The process of recycling platitic film requires that the material be taken from is shoet-like from and converted back into a raw poduct, this process is called reclamation. Reclaimers bay consolidated material by the truckload from distribution centers and commercial film haufers and through a process of ginding, melling and numing through screens they produce platic pellets similar to the original plefit used to make the sheet. Some reclaimers are vertically integrated, maniput that they produce a product and use their own plefit as an input, others simply sell the plefit to a plastic product manifacturer.

End Use

WHO? SPOTLAGHT CASE STUDY Manufacturers, Brand Companies Seventh Generation

WHAT?

Once the plastic film is transformed to pellet it can be used as a raw product is tell weigin plastic. Some nue users make product sfrom tooffic recycled content, while others combine smaller amounts with vigin resin. Whether on not ned users incorporate recycled content depends heavily on the price of vigin plastic. When 01 prices are low, vigin plastic is very cheap to produce and this makes it difficult for recycled pellet to compete. Tertunately, may brand companies have sustainability guests that include the use of recycled content and this keeps the market alw en omatter how cheap vigin resina becomes.

PlasticsMarkets.org

- Recycler Database:
 - List in Directory
 - Search for buyers
- Scrap Pricing
- Export Procedures
- National Recycling Reports

Resource Links

- ISRI Bale Specs
 - http://www.isri.org/docs/default-source/commodities/specsupdate.pdf? sfvrsn=2
- APR Bale Specs
 - http://www.plasticsrecycling.org/markets/model-bale-specs/pe-pp-resinspecifications
- PlasticsMarkets.org
 - [Connect suppliers and buyers of all types of scrap plastic]
- PlasticFilmRecycling.org
 - [Resource for plastic film recycling]
- RecycleYourPlastics.com
 - [Resources for common terminology and collection tips]

Questions?

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