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
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

INSIDE TEXAS

Generators

Collectors/Transporters

Processors

End Users/Manufacturers

OUTSIDE TEXAS

Generators

Collectors/Transporters

Processors

End Users/Manufacturers

--- Direct to end users/manufacturers
--- Imports
--- Exports

Facilities selectively surveyed
Facilities comprehensively surveyed
Facilities not surveyed
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
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 29, 2020
by Colin Staub

Recycled paper mill to idle due to drop in demand
Posted on April 7, 2020
by Colin Staub

Amid pandemic, MRFs face new worker safety challenges
Posted on April 7, 2020
by Colin Staub

Virus leads to program changes across North America
Posted on March 24, 2020
by Colin Staub

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

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)*

Chinese Economy Shrinks For the First Time

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

Hoping for a V-Shaped Recovery

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

* West Texas Intermediate (a benchmark for U.S. crude oil prices)
Source: U.S. Energy Information Administration

Sources: National Bureau of Statistics of China, DECD

Source: IMF
Recycling collection & processing is an essential public service.

Keep Recycling, Texas!

Keep Recycling, Stay Safe, and Recycle Right, Texas.
THANK YOU!

Jordan Fengel
Executive Director of STAR

ejordan.fengel@recyclingstar.org

Cell: 254.721.0652
Office: 512.828.6409