July 13, 2022

INCREASE COLLECTION AND IMPROVE MATERIALS MANAGEMENT INFRASTRUCTURE

Sponsored by:

Recycle with Greif

SERDC
Southeast Recycling Development Council
www.SERDC.org
Some Housekeeping Items

- You will be on mute for this meeting.
- This meeting is being recorded. The recording and the presenter’s slides will be sent to you in an email within a week.
- Appropriate questions typed in the box will be asked by the moderator after everyone has presented.
- If you experience problems with your sound, you can choose AUDIO in your control panel and dial in using the phone number that appears.
- Please register for our other webinars in the series at www.serdc.org/webinars
Natalie Betts,
Balcones Resources

Moderated by SERDC Committee Member::
About Us

• Founded in 1994 – Over 27 years in business
• Largest independent recycler in the Southern US
• All we do is recycle
  • No landfill ownership, no trash hauling
• Five recycling facilities
  • 6th facility coming soon to San Antonio, TX

The Balcones Difference

Our Facilities
Most advanced facilities in the country

Our People
Recycling is our life’s work

Our Partnerships
Award-winning and unrivaled
Our first presenter is:

Scott Mouw
Senior Director of Strategy and Research, The Recycling Partnership
Collection and Processing: Room for Improvement and Opportunity

Scott Mouw, The Recycling Partnership
SERDC Webinar Series
July 13, 2022

We mobilize people, data, and solutions across the value chain to unlock the environmental and economic benefits of recycling and a circular economy.
Engaging the Supply Chain
State of Residential Recycling

Foundation in place; massive room for improvement

System delivering 1/3 of available material to the recycling economy

40% of households lack equitable access

Next challenge: Tackling recycling behavior!
Single Family Opportunities

Challenges facing cities
- Labor, competing priorities, etc.

Access and Carting
- Losses to make up; new places to gain
- New Orleans, Mobile, Jackson, western Virginia, Chesapeake

Subscription and service schedules to fix
- Drop-off upgrades
- Boosting carted programs around recycling behavior
Over 9,000 Programs Researched

Includes:
- Type of program
- Type of collection
- Type of bins
- Acceptable materials in each community
- Updated quarterly
- All communities and counties over 2,500 households

Covers 30,000 communities
MRF Opportunities

Blended values driving investment

Key areas of work to do:

- Saying yes to polypropylene
- Capture upgrades
- Prepping for other sorts
- Equipment innovation and deployment
- Automation, automation, automation
- Basic maintenance/operation

Variable MRF picture presents challenges
### Estimated Value of All Generated Single-Family Materials

<table>
<thead>
<tr>
<th>Material</th>
<th>SOC</th>
<th>Mar-22</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cardboard</td>
<td>$128,283,216</td>
<td>$818,292,750</td>
</tr>
<tr>
<td>Mixed Paper</td>
<td>-$27,678,242</td>
<td>$927,059,603</td>
</tr>
<tr>
<td>Aseptic &amp; Gabletop</td>
<td>$6,650,685</td>
<td>$879,819</td>
</tr>
<tr>
<td>PET Bottles</td>
<td>$566,215,297</td>
<td>$2,175,569,087</td>
</tr>
<tr>
<td>HDPE Natural Bottles &amp; Jars</td>
<td>$517,418,564</td>
<td>$555,111,559</td>
</tr>
<tr>
<td>HDPE Colored Bottles &amp; Jars</td>
<td>$206,572,714</td>
<td>$399,455,697</td>
</tr>
<tr>
<td>Glass Containers</td>
<td>-$157,674,363</td>
<td>-$181,678,313</td>
</tr>
<tr>
<td>Steel Cans</td>
<td>$90,848,151</td>
<td>$242,814,537</td>
</tr>
<tr>
<td>Aluminum Cans</td>
<td>$1,308,237,225</td>
<td>$3,630,355,889</td>
</tr>
<tr>
<td>Other Plastic Packaging (~#3-7)</td>
<td>$8,352,010</td>
<td>$1,819,960</td>
</tr>
<tr>
<td>PP</td>
<td>$116,655,009</td>
<td>$573,758,821</td>
</tr>
<tr>
<td>Bulky Rigid Plastics</td>
<td>$56,667,292</td>
<td>$78,062,425</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$2,703,892,549</td>
<td>$8,647,743,013</td>
</tr>
</tbody>
</table>

#### Blended Value - Mar 2017 to Mar 2022

![Graph showing the value of materials from March 2017 to March 2022](chart.png)
Multifamily Recycling Potential

- 13 MM units lack on-site option
- 80% capture would yield 4MM new tons
- SERDC-area communities making progress:
  - Atlanta, Orlando, Raleigh, Sarasota County
- Mix of containers and approaches
- Local policy as a key driver

www.recyclingpartnership.org/multifamily
$17B investment is needed over 5 years

Return on Investment Over 10 Years

Improved recycling system delivers 169M tons of new recyclables

+ $30.8B economic benefit

112% increase in recycling rate from 32-68%

$11B for wages

$9.4B landfill savings

710M metric tons of CO₂ equivalent avoided

$8.8B value of recyclables

198,000 jobs created

https://recyclingpartnership.org/paying-it-forward/
## Household Capture (volume) and Participation (regularity)

<table>
<thead>
<tr>
<th>Household</th>
<th>No. 1</th>
<th>No. 2</th>
<th>No. 3</th>
<th>No. 4</th>
<th>No. 5</th>
<th>No. 6</th>
<th>No. 7</th>
<th>No. 8</th>
<th>No. 9</th>
<th>No. 10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Participation</td>
<td>FULL</td>
<td>FULL</td>
<td>FULL</td>
<td>FULL</td>
<td>3/4</td>
<td>HALF</td>
<td>1/4</td>
<td>1/4</td>
<td>NONE</td>
<td>NONE</td>
</tr>
<tr>
<td>Full Capture</td>
<td>HALF</td>
<td>HALF</td>
<td>3/4</td>
<td>3/4</td>
<td>3/4</td>
<td>HALF</td>
<td>1/4</td>
<td>1/4</td>
<td>NONE</td>
<td>NONE</td>
</tr>
</tbody>
</table>

### “Overheard” (Barriers)

- **I don’t like washing things out.**
- **Does it matter?**
- **My kids forget.**
- **It’s easier to throw things away.**
- **Recycling doesn’t work.**
- **I should do more. I just don’t.**

Within homes with equal access (garbage and recycling same level of service)

It all adds up.
Extended Producer Responsibility Legislation*

- 4 States Have Passed EPR Bills (ME, OR, CO, CA)
- 17 EPR bills introduced in 2022

*Packaging/Printed Paper and Packaging EPR
Why SERDC’s Work Is So Important

https://www.serdc.org/maps
Thank You!

Scott Mouw
Senior Director, Strategy and Research
smouw@recyclingpartnership.org
919-633-0738
Our second presenter is:

Chris Wirth
Vice President of Marketing and Government Relations,
AMP Robotics
Please comment on the EPA Solid Waste Infrastructure for Recycling Program
AND
Recycling Education and Outreach- Grant Program and Model Recycling Program Toolkit

Comments and information must be received on or before July 25, 2022.

Thank you for sponsoring today’s webinar:
https://www.serdc.org/Greif-Webinar-Sponsor

Make sure August 10 at 11 am ET is on your calendar:

Standardizing Measurement and Increasing Data Collection

Please take the brief survey before you leave today.

Will Sagar
Executive Director
will.sagar@serdc.org
(828) 507-0123

Jen Dabbs
Director of Outreach & Member Services
jen.dabbs@serdc.org
(828) 575-0012