

# Recycling Market Development:

## *Policies that drive a circular economy*

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## Materials Markets Challenges

Markets for recovered commodities have been negatively impacted by the China National Sword policy and subsequent import restrictions imposed by other countries not wanting to receive this displaced material. The Chinese government intends to further restrict imports, with the aim of developing its own sources of supply in future years. Because of the extent to which the U.S. and Canada have relied on export markets, there is a need to significantly expand the recycling and consumption of recovered materials in North America. Other market forces, like the low cost of virgin feedstocks and the high cost of processing, also challenge the marketability of certain recyclable materials.

There is no recycling without end market consumption of recovered materials, so it is vital that strong and consistent end markets exist that can absorb available supply. ***Circular Matters is poised to help develop these markets.***

## Market Development Services

Circular Matters' team members each have over 25 years of professional experience in sustainable materials management.

### Planning

- Strategic and business plans for recycling market development programs
- Market development plans for specific materials

### Policy and Program Development

- Environmentally Preferable Purchasing Guidelines
- Programs that incentivize the use of recovered material as a manufacturing feedstock

### Evaluation and Strategy Development

- Supply and demand analyses to assess market capacity to absorb material supply in specific marketplaces
- Market development program evaluation
- Feedstock sourcing and supply feasibility studies
- Recycling Economic Impact (REI) studies
- Pilot projects to test processes and recycled content performance

# Our Experience and Clients

Circular Matters team members have considerable experience in recycling market development. A sampling of specific projects undertaken in full or in part by Circular Matters team members include the following:



## Projects for the U.S. EPA and States:

- Supply and Demand Analysis, Recycling Market Development Strategic Plan, Recycling Markets Center Business Plan, Pennsylvania
- Supply and Demand Analysis, Recycling Market Development Strategic Plan, Environmentally Preferable Purchasing Guidelines, Texas
- Supply and Demand Analysis, Identification of Potential Market Development Opportunities and Barriers, Strategic Plan to Promote the Use of Recyclable Materials, Massachusetts
- Waste Tire Market Studies and Tire-Derived Business Assistance Program Support, California
- Strategy to Market Scrap Tires, New York
- Facilitation of Stakeholder Input Session for Residential Mixed Paper Markets, South Carolina
- Supply and Demand Analysis, Recycling Market Development Strategic Plan, North Carolina
- Evaluation of Recycling Market Development Program, Arizona
- Recycling Economic Impact Studies, 12 states
- Evaluation of Recycled Plastic Lumber for Marine Structural Applications, U.S. EPA
- Assessments of Needs and Opportunities for Jobs Through Recycling Program, U.S. EPA

## Projects for Private Clients:

- Assessment of Glass Markets and Strategy for Brand Owner to Increase Recycling of Glass, Unilever
- Assessment of Scrap Tire Manufacturing Incentive Program, Ontario Tire Stewardship
- Growing Recycling of Beverage Cartons and Hot Beverage Paper Cups in Ontario, Tim Hortons, with Carton Council of Canada and Stewardship Ontario
- Assessment of Feedstock and Fatal Flaw Analyses for Various Processing Facilities, Several U.S. Confidential Clients
- PET Bottle Full Cost Recovery and Recycling Study, Mohawk Industries
- Advance Disposal Fee Takeback Credit Analysis, Publix Supermarkets
- Supply Projections and Fiber Sourcing Strategy Recommendations, International Mill/Processor

## Projects for Industry and Regional Associations:

- Recycling Market Development in the U.S.: Looking Back and Looking Forward on behalf of More Recycling, American Chemistry Council, Trex Company, Inc. and Oregon DEQ
- Film Recycling Investment Analysis, Closed Loop Foundation
- Mixed Waste Processing and Paper Marketability Analysis, American Forest & Paper Association
- Paper Based Food Service Packaging Supply and Demand Analysis, Assessment of End Market and Recovery System Options, Food Service Packaging Institute
- Recycling Economic Impact Studies, Northeast Recycling Council (NERC) and National Recycling Coalition and Houston-Galveston Area Council (HGAC)
- Two Year Work Plan, Chelsea Center for Recycling Economic Development (MA)