



**RSE USA**

Sustainable Product Solutions

# Recycling Market Development

Historically, federal, state and regional agencies in the U.S. invested in recycling market development to:

- Ensure demand for recovered materials expanded to keep up with significant increases in supply of recyclables; and/or
- Promote economic development and the creation of “green” jobs by supporting and manufacturers that rely on recovered materials as a feedstock.

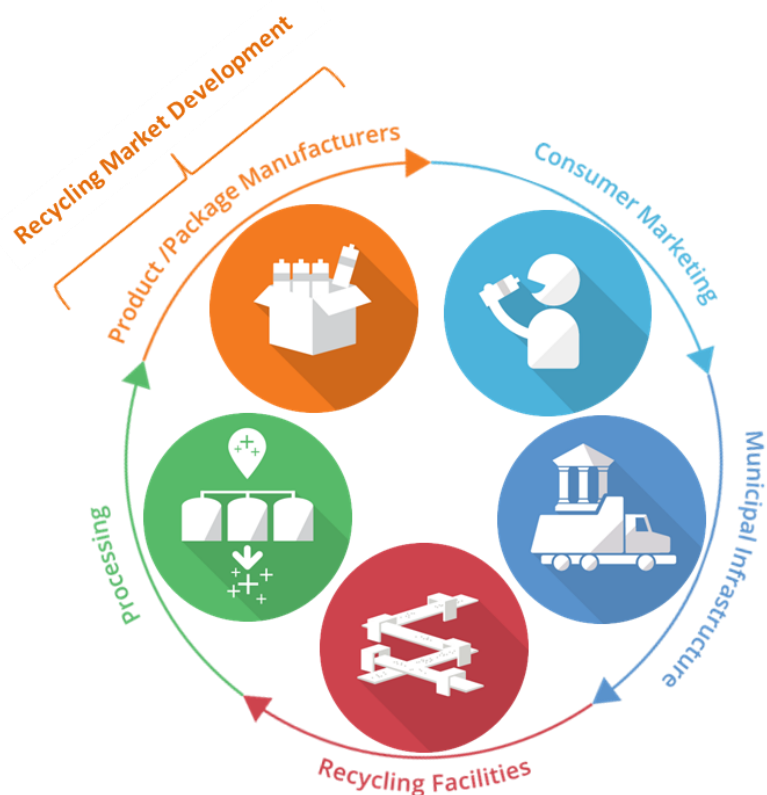
## Strong Historic Materials Markets

For the past two decades China has provided a seemingly insatiable outlet for U.S.-recovered materials. Consequently, there has been less focus in recent years on domestic end market development.

## Anticipated Global Policy Impacts

Markets for recovered commodities are being negatively impacted by the China National Sword policy. The Chinese government intends to restrict importation of low-grade commodities, tighten specifications, and develop its own sources of supply to replace imports. This is especially true for 3-7 rigid plastics, residential mixed paper, and plastic film. Because of the extent to which the U.S. as well as Canada rely on Chinese markets, there is a market crisis brewing and therefore a need to significantly expand the recycling and consumption of recovered materials in North America.

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. *RSE USA is poised to help develop these markets.*





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## RSE USA Market Development Services

We have expertise to provide an array of services.

### Planning

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

### Policy and Program Development

- Development of Environmentally Preferable Purchasing guidelines to spur demand for recovered materials
- Assisting clients with developing and implementing programs that incentivize the use of recovered material as a manufacturing feedstock

### Evaluations and Pilot Studies

- Supply and demand analyses to assess market capacity to absorb supply in specific marketplaces for specific material types
- Market development program evaluation
- Feedstock sourcing and supply feasibility studies
- Recycling economic impact studies to document the return-on-investment for

market development initiatives in terms of jobs and economic activity

- Pilot projects to test processes and recycled content product performance

### Technical Research/Information Tools

- Research and stakeholder forums to identify market strengths, barriers, weaknesses and opportunities for a wide range of commodities
- Information tools and resources to ensure generators are aware of existing end markets and to promote purchase of recycled content products



We have supported a broad range of industries and organizations.



## Our Experience and Clients

RSE USA team members have considerable experience in recycling market development. A sampling of specific projects undertaken in full or in part by RSE USA team members is listed below.

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

- **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**



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- **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

- **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)

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## Contact Us

For more information or to further explore how RSE USA can support you with recycling market development, contact:

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