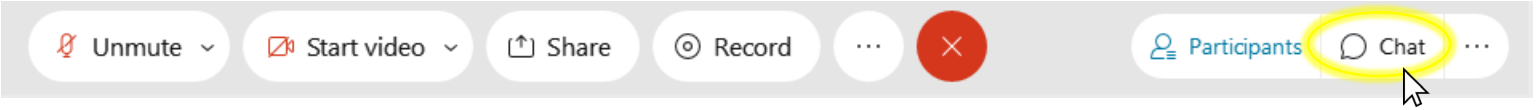
DEPARTMENT OF ECOLOGY
State of Washington

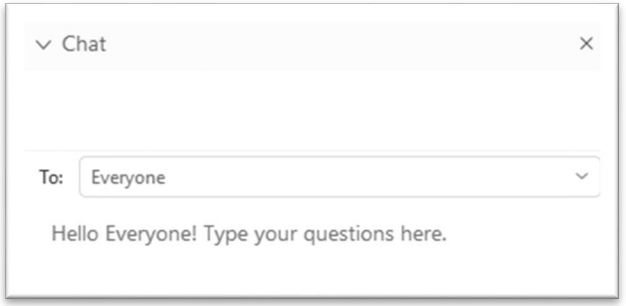
Recycling Development Center Advisory Board Meeting

February 10, 2021 | 9am – 12pm (Pacific time)

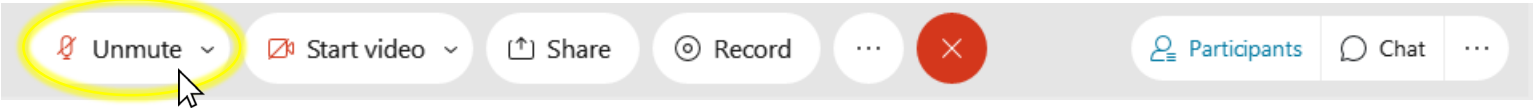
Participating in this meeting:

Anyone may use the chat box to ask questions:





Board members may unmute themselves.



We will have opportunities for public comments throughout the meeting.

*Note: we are **not** recording this meeting, meeting notes will be posted on the Advisory Board website.*

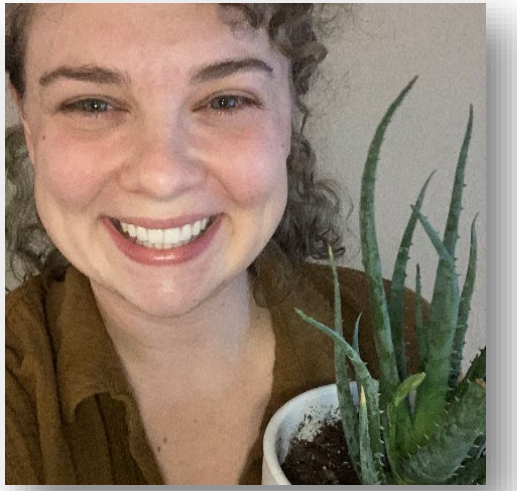
Agenda

9:00 am	Welcome & review meeting goals
9:10 am	Updates
10:00 am	Paper market presentations
11:00 am	Paper summary discussion
11:50 am	Wrap-up

This meeting is brought to you by:

Kara Steward
Center coordinator

Tina Schaefer
Center planner



Katherine Walton
Facilitator

…and many other staff at Ecology and Commerce.

Updates

Washington RECYCLING DEVELOPMENT CENTER

1. Board member roundtable
2. Dept. of Commerce & Ecology
3. Data and Outreach subcommittee
4. Legislative session
5. Attendees

Board roundtable:

Corinne Drennan	Allen Langdon
Karl Englund	Scott Morgan
Kyla Fisher	Mike Range
Deb Geiger	Derek Ruckman
Margo Gillaspy	Tim Shestek
Nina Goodrich	Jay Simmons
Sego Jackson	Heather Trim

Departments of Ecology and Commerce Updates

A year full of Center accomplishments

2020

January

Board meeting #1

Spring

Goals and metrics

Goals for the Recycling Development Center – approved July 13, 2020

Our goals are to:

- **Develop local and regional markets and processing** for Washington's recyclable products and materials[1] to be transformed or remanufactured into usable or marketable products for use other than landfill disposal or incineration. This work will:
  - Encourage waste prevention and emphasize reuse before materials enter the waste stream; and

DRAFT Metrics of Success for the Recycling Development Center

We will know we made a difference if we have:

- **Increased business use of recycled plastic or paper material** – Worked with 10 new or existing businesses in WA to manufacture products using plastic or paper recyclable materials, in five years.
- **Increased business use of other recycled material and reusable products** – Worked with 10 new or existing businesses in WA to increase use of reusable or recyclable materials, in five years.

Summer

Work Plan

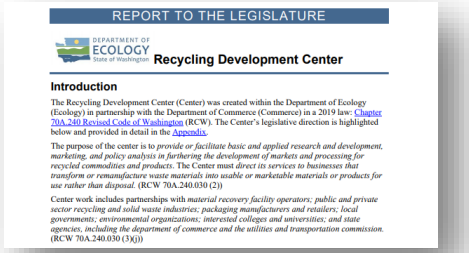
Work Plan for the Washington State Recycling Development Center

Inaugural annual work plan: July 2020

Washington RECYCLING DEVELOPMENT CENTER

December

Report to the Legislature



REPORT TO THE LEGISLATURE

DEPARTMENT OF ECOLOGY State of Washington **Recycling Development Center**

Introduction

The Recycling Development Center (Center) was created within the Department of Ecology (Ecology) in partnership with the Department of Commerce (Commerce) in a 2019 law: Chapter 70A.240 Revised Code of Washington (RCW). The Center's legislative direction is highlighted below and provided in detail in the Appendix.

The purpose of the center is to *provide or facilitate basic and applied research and development, marketing, and policy analysis in furthering the development of markets and processing for recycled commodities and products.* The Center must *direct its services to businesses that transform or remanufacture waste materials into usable or marketable materials or products for use rather than disposal.* (RCW 70A.240.030 (2))

Center work includes partnerships with *material recovery facility operators; public and private sector recycling and solid waste industries; packaging manufacturers and retailers; local governments; environmental organizations; interested colleges and universities; and state agencies, including the department of commerce and the utilities and transportation commission.* (RCW 70A.240.030 (3)(j))

Thank you all…

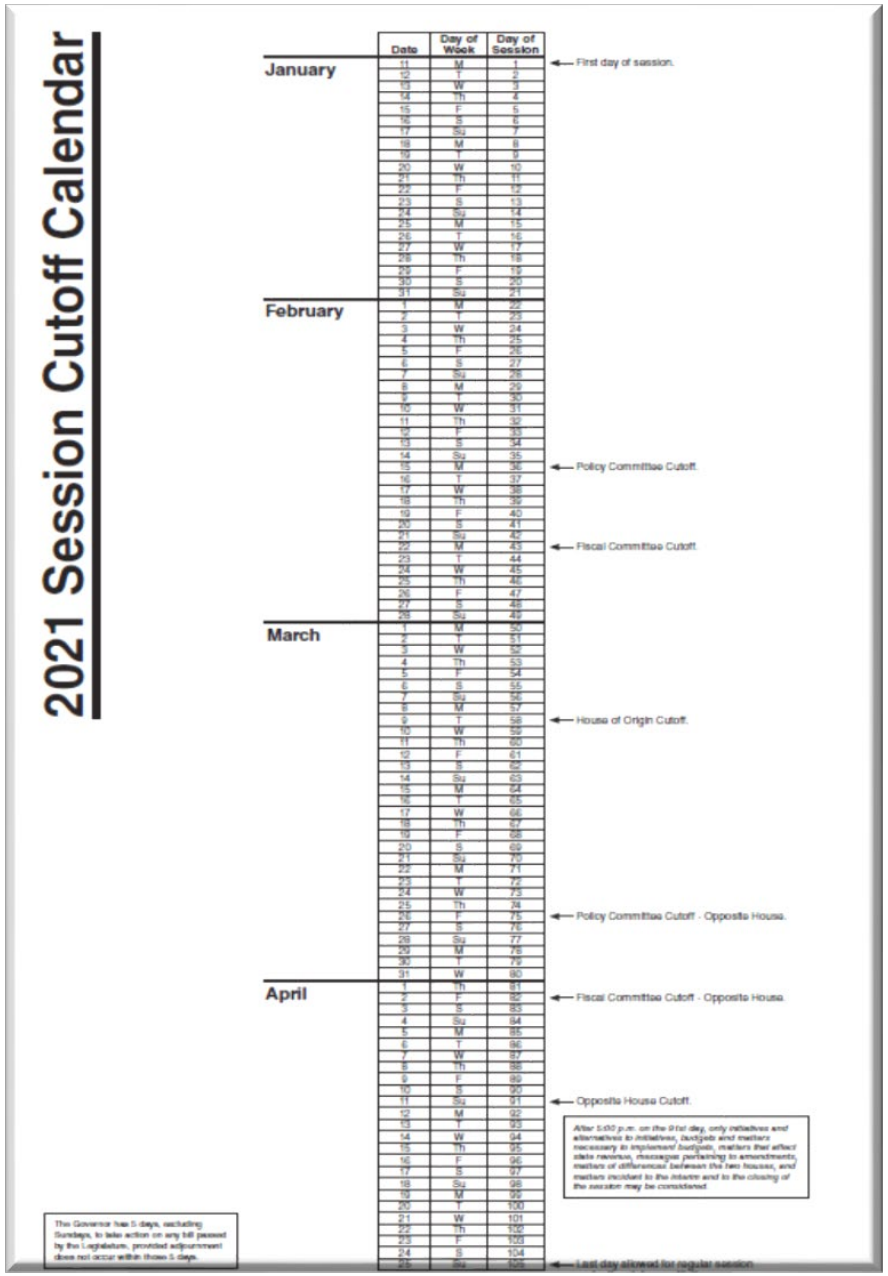
…and let’s get back to work!

Board subcommittee update:

Corinne Drennan	Allen Langdon
Karl Englund	Scott Morgan
Kyla Fisher	Mike Range
Deb Geiger	Derek Ruckman
Margo Gillaspy	Tim Shestek
Nina Goodrich	Jay Simmons
Sego Jackson	Heather Trim

Legislative update:

- Julie Robertson
- Heather Trim



2021 Session Cutoff Calendar

	Date	Day of Week	Day of Session	
January	11	M	1	← First day of session.
	12	T	2	
	13	W	3	
	14	Th	4	
	15	F	5	
	16	S	6	
	17	Su	7	
	18	M	8	
	19	T	9	
	20	W	10	
	21	Th	11	
	22	F	12	
	23	S	13	
	24	Su	14	
	25	M	15	
	26	T	16	
	27	W	17	
	28	Th	18	
	29	F	19	
	30	S	20	
	31	Su	21	
February	1	M	22	
	2	T	23	
	3	W	24	
	4	Th	25	
	5	F	26	
	6	S	27	
	7	Su	28	
	8	M	29	
	9	T	30	
	10	W	31	
	11	Th	32	
	12	F	33	
	13	S	34	
	14	Su	35	
	15	M	36	← Policy Committee Cutoff.
	16	T	37	
	17	W	38	
	18	Th	39	
	19	F	40	
	20	S	41	
	21	Su	42	
	22	M	43	← Fiscal Committee Cutoff.
	23	T	44	
	24	W	45	
	25	Th	46	
	26	F	47	
	27	S	48	
	28	Su	49	
March	1	M	50	
	2	T	51	
	3	W	52	
	4	Th	53	
	5	F	54	
	6	S	55	
	7	Su	56	
	8	M	57	
	9	T	58	← House of Origin Cutoff.
	10	W	59	
	11	Th	60	
	12	F	61	
	13	S	62	
	14	Su	63	
	15	M	64	
	16	T	65	
	17	W	66	
	18	Th	67	
	19	F	68	
	20	S	69	
	21	Su	70	
	22	M	71	
	23	T	72	
	24	W	73	
	25	Th	74	
	26	F	75	← Policy Committee Cutoff - Opposite House.
	27	S	76	
	28	Su	77	
	29	M	78	
	30	T	79	
	31	W	80	
April	1	Th	81	
	2	F	82	← Fiscal Committee Cutoff - Opposite House.
	3	S	83	
	4	Su	84	
	5	M	85	
	6	T	86	
	7	W	87	
	8	Th	88	
	9	F	89	
	10	S	90	
	11	Su	91	← Opposite House Cutoff.
	12	M	92	
	13	T	93	
	14	W	94	
	15	Th	95	
	16	F	96	
	17	S	97	
	18	Su	98	
	19	M	99	
	20	T	100	
	21	W	101	
	22	Th	102	
	23	F	103	
	24	S	104	
	25	Su	105	← Last day allowed for regular session.

After 5:00 p.m. on the 91st day, only initiatives and alternatives to initiatives, budgets and matters necessary to implement budgets, matters that affect state revenue, messages pertaining to amendments, matters of difference between the two houses, and matters incident to the interim and to the closing of the session may be considered.

The Governor has 5 days, excluding Sundays, to take action on any bill passed by the Legislature, provided adjournment does not occur within those 5 days.

- First day: Jan. 11
- Policy cutoff: Feb. 15
- Fiscal cutoff: Feb. 22
- House origin: March 9
- Last day: April 25

Bags, Organics, & Industrial Waste

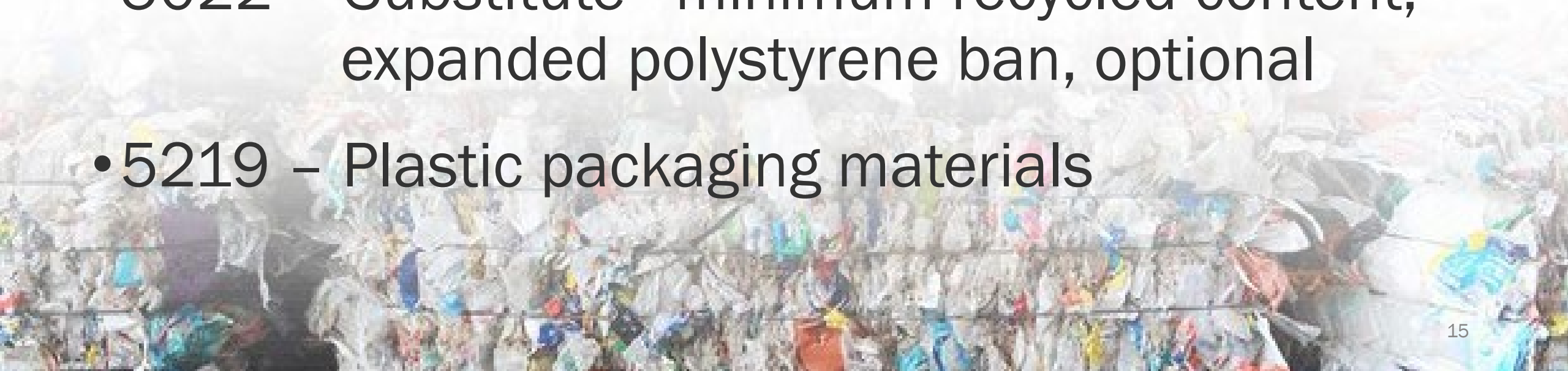
- 1053 – Delaying restrictions on carryout bags
- 1145 – Allowing nonwood renewable fiber use in bags
- 5286 – Statewide organic waste management goal
- 5345 – Statewide industrial waste coordination

Product Stewardship

- 1393 - Delaying dates for photo voltaic module stewardship
- 5174 - Recycling of wind turbine blades

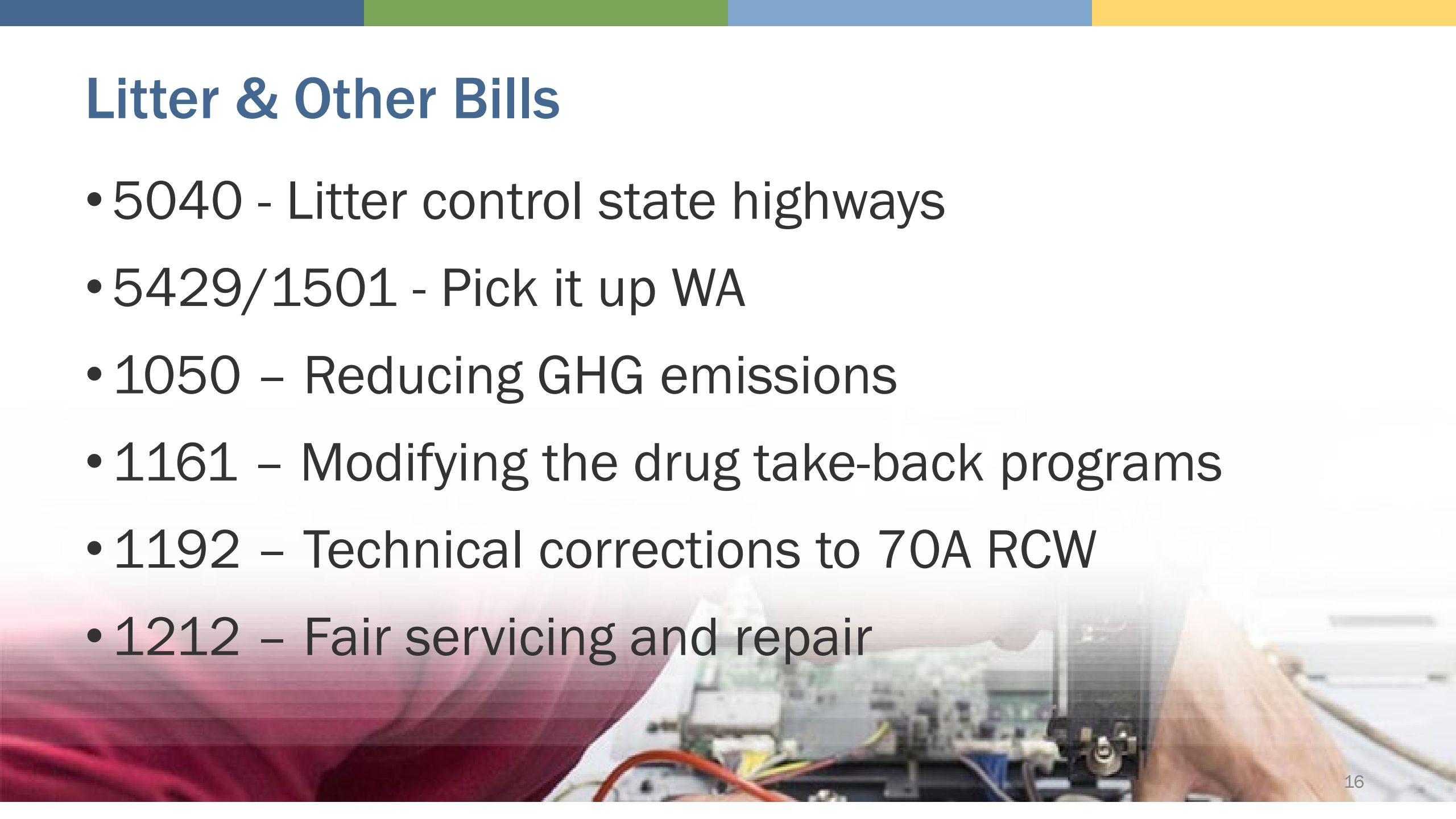
Extended Producer Responsibility & Plastics

- 1118 – Extended producer responsibility
- 1488 – Plastic packaging materials
- 5022 – Substitute - minimum recycled content, expanded polystyrene ban, optional
- 5219 – Plastic packaging materials



Litter & Other Bills

- 5040 - Litter control state highways
- 5429/1501 - Pick it up WA
- 1050 – Reducing GHG emissions
- 1161 – Modifying the drug take-back programs
- 1192 – Technical corrections to 70A RCW
- 1212 – Fair servicing and repair



Allowing the use of nonwood renewable fiber in recycled content paper carryout bags

HB 1145 – Rep. Skylar Rude

https://ecology.wa.gov/Air-Climate/Air-quality/Smoke-fire/Agricultural-burning

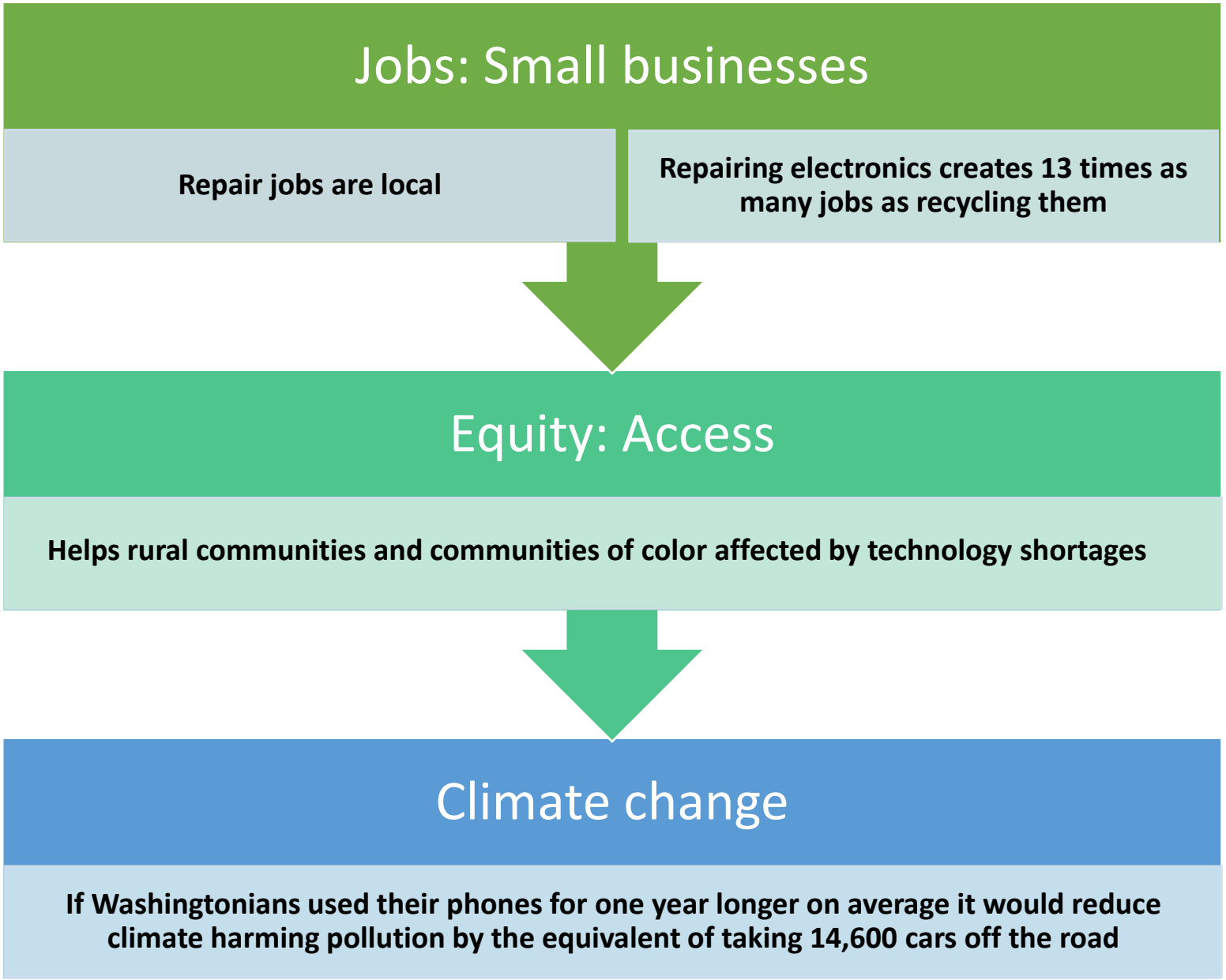
Promoting the fair servicing and repair of digital electronic products to increase access to appropriate and affordable digital products, support small businesses and jobs, and enhance digital connectivity in Washington state

HB 1212 – Rep. Mia Gregerson

Right to Repair

www.techspot.com/news/73630-california-enters-right-repair-movement-new-proposal.html

zero waste washington


Jobs: Small businesses
Repair jobs are local
Repairing electronics creates 13 times as many jobs as recycling them
Equity: Access
Helps rural communities and communities of color affected by technology shortages
Climate change
If Washingtonians used their phones for one year longer on average it would reduce climate harming pollution by the equivalent of taking 14,600 cars off the road

Establishing a statewide organic waste goal

SB 5286 – Sen. Mona Das

Compost and Food Waste

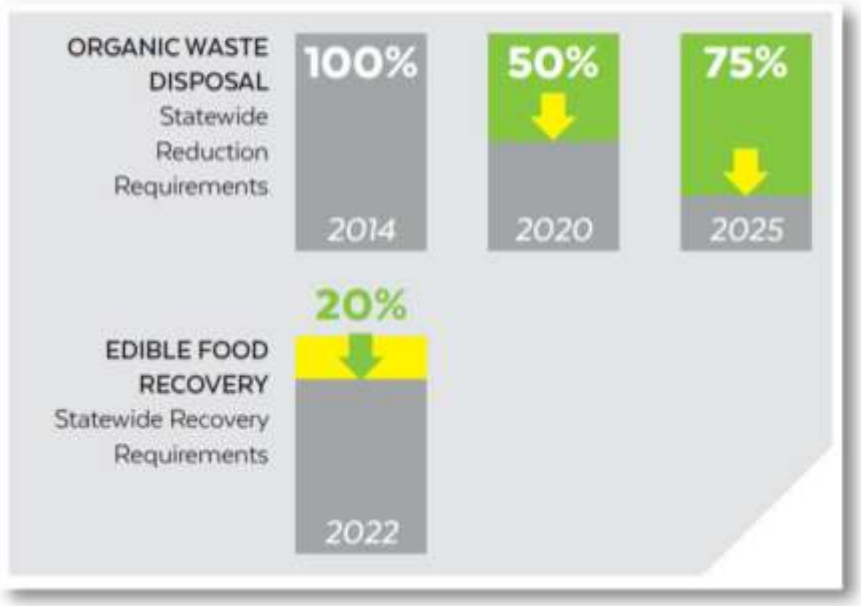
California SB 1383, September 2016

SB 1383: WHAT YOU NEED TO KNOW

Required Organics Waste Recycling |

SB 1383 will revolutionize how we dispose of organic materials in California by requiring organics waste recycling in nearly every jurisdiction. The measure ultimately requires a 75 percent reduction of the level of statewide disposal of organic waste by 2025, based on levels from 2014.

Additionally, jurisdictions will need to implement programs to recover 20 percent of commercial edible food from disposal. A jurisdiction may designate a public or private entity to fulfill many of its responsibilities, but the jurisdiction is ultimately responsible for compliance with the requirements of SB 1383.



Providing for the recycling of wind turbine blades

SB 5174 – Sen. Wilson

www.wind-watch.org/

Establishing a statewide industrial waste coordination program

SB 5345 – Sen Sharon Brown

KALUNDBORG SYMBIOSIS 2018

Energy

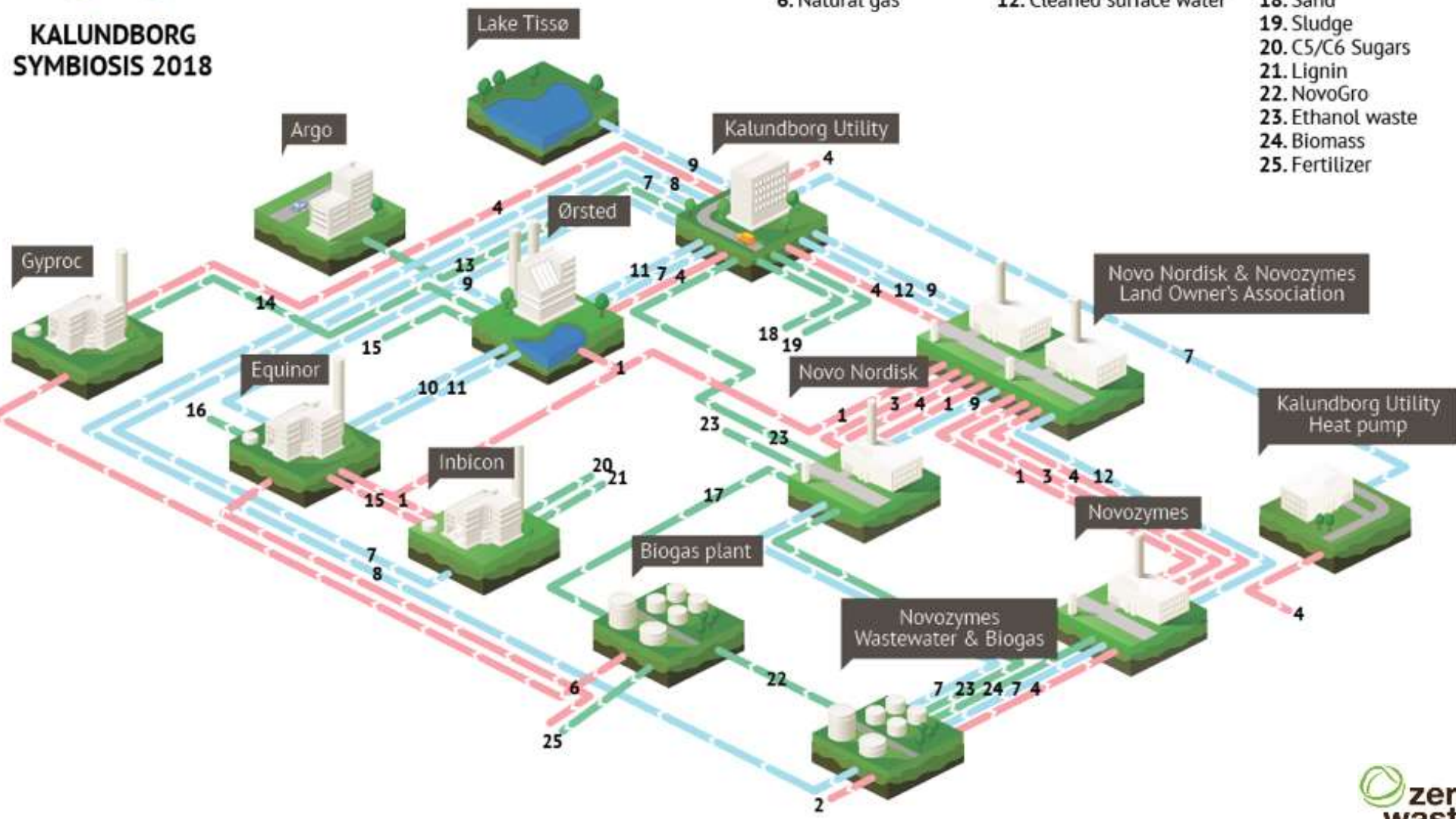
1. Steam
2. Power to grid
3. Warm condensate
4. District heating
5. Bioethanol
6. Natural gas

Water

7. Waste water
8. Cleaned waste water
9. Surface water
10. Used cooling water
11. Deionized water
12. Cleaned surface water

Materials

13. Waste
14. Gypsum
15. Fly ash
16. Sulphur
17. Slurry
18. Sand
19. Sludge
20. C5/C6 Sugars
21. Lignin
22. NovoGro
23. Ethanol waste
24. Biomass
25. Fertilizer



Lind, WA: 200 acres with 81,000 solar panels

https://www.kxly.com/news/watch-air-4-drone-tours-state-s-largest-solar-farm/795182623 *(Sept 2019)*

Concerning the management of certain materials to support recycling and waste and litter reduction

SB 5022 – Sen. Mona Das

HB 1118 – Rep. Liz Berry

Ban expanded polystyrene

food service products, coolers, peanuts

"Prepackaged food" and medical needs exempt

zero waste washington

Minimum recycled content requirements

Average post-consumer recycled content for plastic beverage containers:

- **15% by January 1, 2023**
- **25% by January 1, 2026**
- **50% by January 1, 2031**

zero waste washington

Nestlé

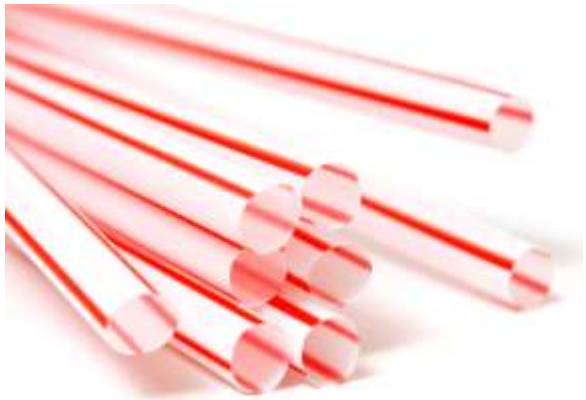
Coca Cola

PepsiCo

Naked

Evian

Ask first:



zero waste
washington

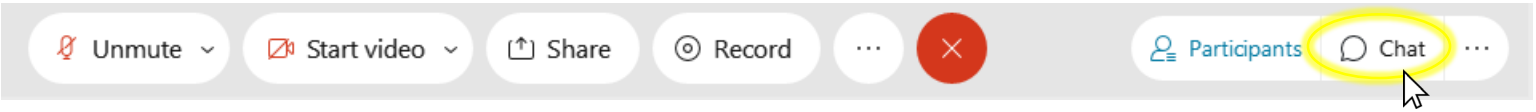
Concerning the management of plastic packaging materials

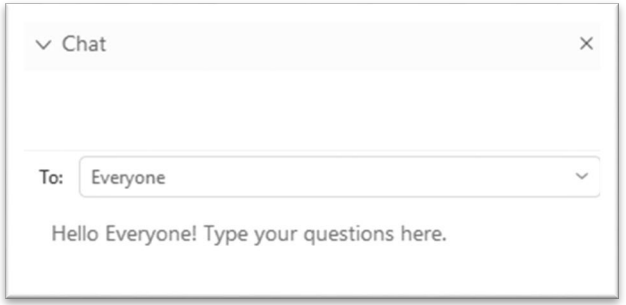
SB 5219 – Sen. Derek Stanford

HB 1488 – Rep. Jake Fey

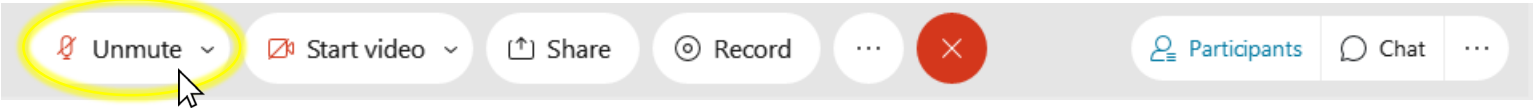
Attendee comments:

Anyone may use the chat box to ask questions:





Board members may unmute themselves.



We will read comments from the chat box or unmute attendees for brief comments.

Paper Markets

Jay Simmons, NORPAC

Terry Weber, AF&PA

Washington RECYCLING DEVELOPMENT CENTER

WA RDC –
Trends in Paper Markets 2020

February 2021

Major Paper Sectors

- Graphic Papers
  - Newsprint
  - Copy Paper
  - UCFS (Uncoated Free Sheet) Web Based Commercial Printing -
    - Monthly Statements, Corporate Reports, etc.
  - Envelope
  - Book
  - Magazine / Inserts
    - Inserts are primarily included in Newspaper but are transitioning to direct mailings

Major Paper Sectors

- Containerboard
  - Medium
  - Liner
- Bag & Specialty Kraft
  - Grocery & Dry Good Bags
  - LW and Carry Out Bags
  - Specialty Kraft – Masking, Void Fill,
- Tissue/Towel

Wastepaper Grade Usages

Fiber Type / END PRODUCT	DLK (**D**ouble **L**ined **K**raft)	OCC (**O**ld **C**orrugated **C**ontainers)	OP (**O**ffice **P**apers)	ONP (**O**ld **N**ews**p**apers)	OMG (**O**ld **Mag**azines)	MIX (**M**ixed **P**apers)	BOOK (Hardback & Softback)	Gable Top / Aseptic
Unbleached Packaging								
Recycled Unbleached Market Pulp								
Newsprint								
Bleached Packaging								
Recycled Bleached Market Pulp								
HI Bright Graphics Papers								

Market Trend Data

- Consumption Trends by Paper Grade Sector data from RISI
- RISI data current as of Mid 2020
- PNW consuming mills have minimal published information.

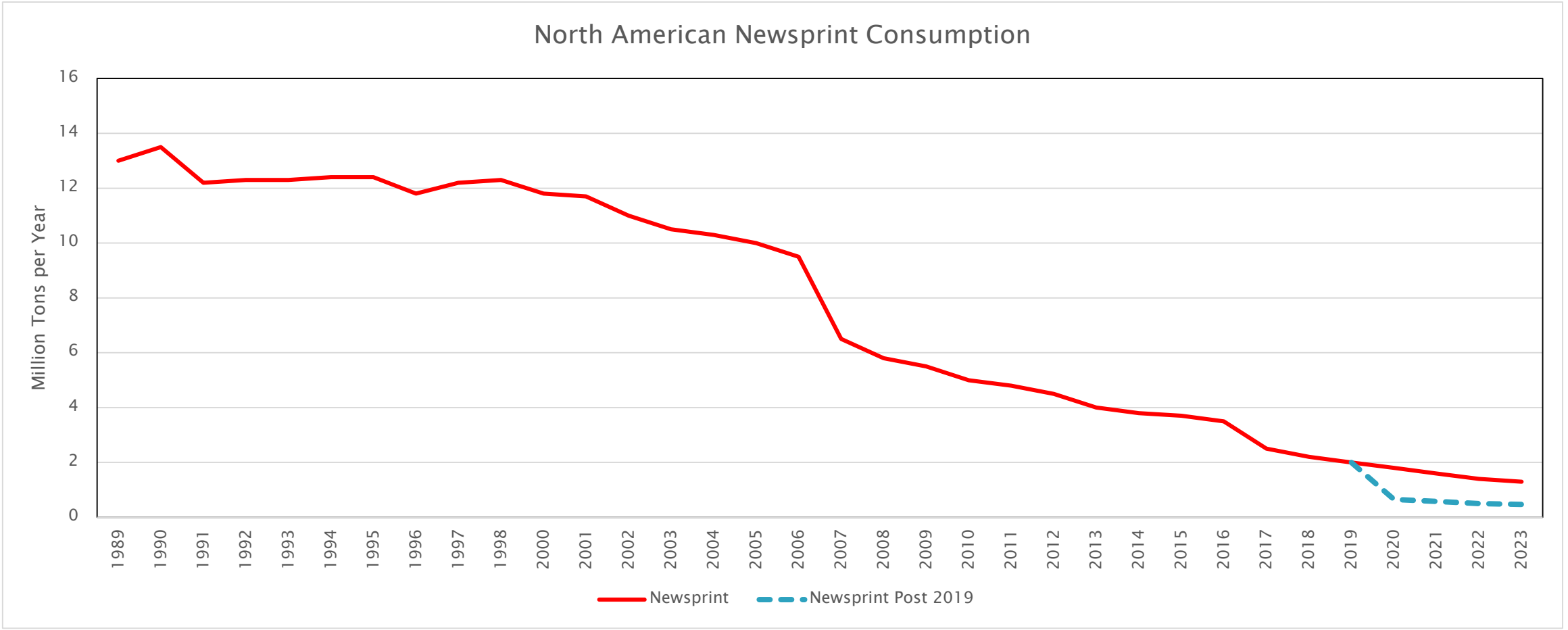
Graphic Papers – NEWSPRINT

- Newsprint
  - Brick & Mortar closures at 400,000 units in 2018
  - Related Inserts Drop
  - Large population centers see largest decline
  - Smaller communities actually seeing slight growth

Graphic Papers – NEWSPRINT

- New World 2020
  - 74% decline in consumption
  - Additional permanent closures in N. America.
  - Resolute mill in Usk, WA (Ponderay) was impacted by closures.
  - Where recycle or virgin raw material available, machines are options for converting to lightweight packaging

Graphic Papers - NEWSPRINT



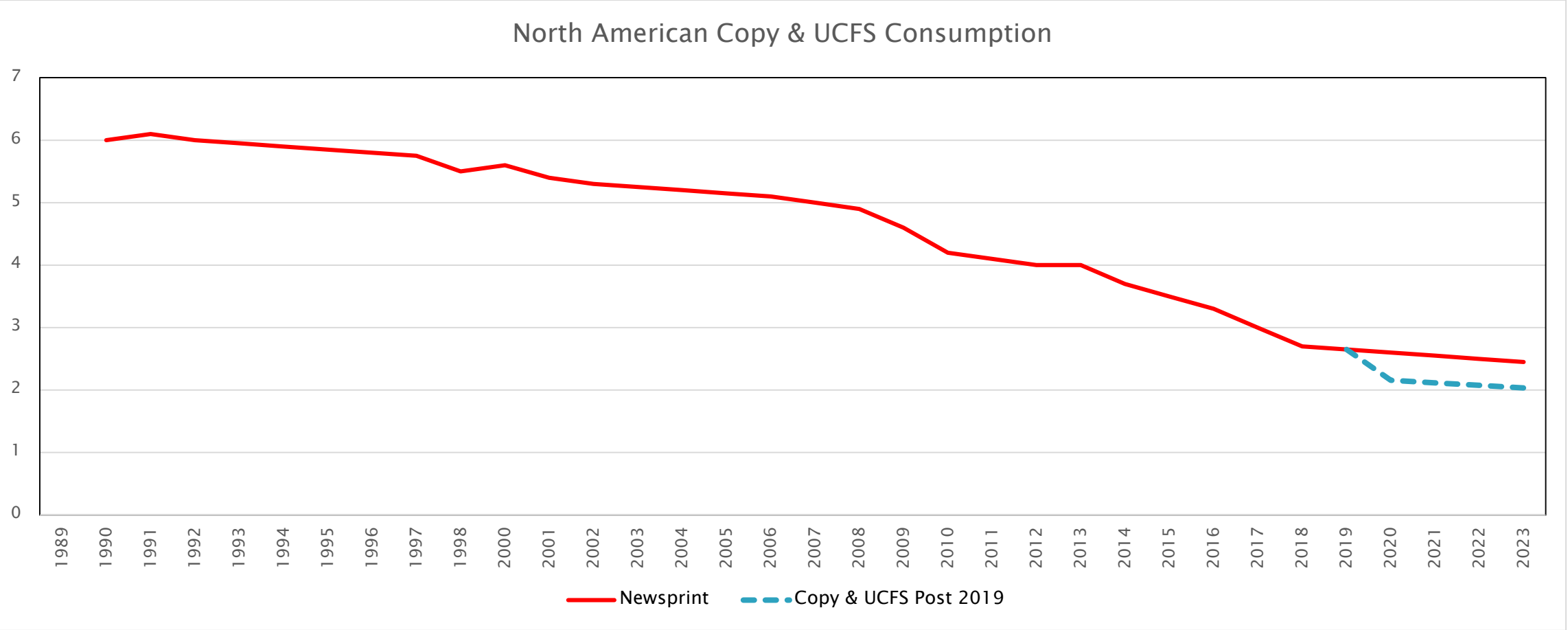
Graphic Papers – COPY & UCFS

- Copy Paper (UCFS)
  - Decline Significant between Y2000 and Y2007
  - Great Recession “re-set” demand level driven by “.com” failures
  - Camas Closure May 2018
  - Port Hudson, LA mill closure March 2019
- Imports went from ~23% of market to ~13% in 2016 due to tariffs/penalties.

Graphic Papers – COPY & UCFS

- New World 2020
  - By 2020 Q2 consumption had dropped ~30% compared to year ago 2019 Q2
  - Domtar closes 3 mills by 2020 Q2
    - One additional mill slated for closure in early 2021
  - Business conducting business remotely
  - Conferences/business travel all done electronically
  - Schools conducting virtual learning at all levels

Graphic Papers – COPY & UCFS



Graphic Papers – ENVELOPE

- Decline Significant since ".com" failures in 2007 – 2008
- Aligns with decline of Copy and UCFS

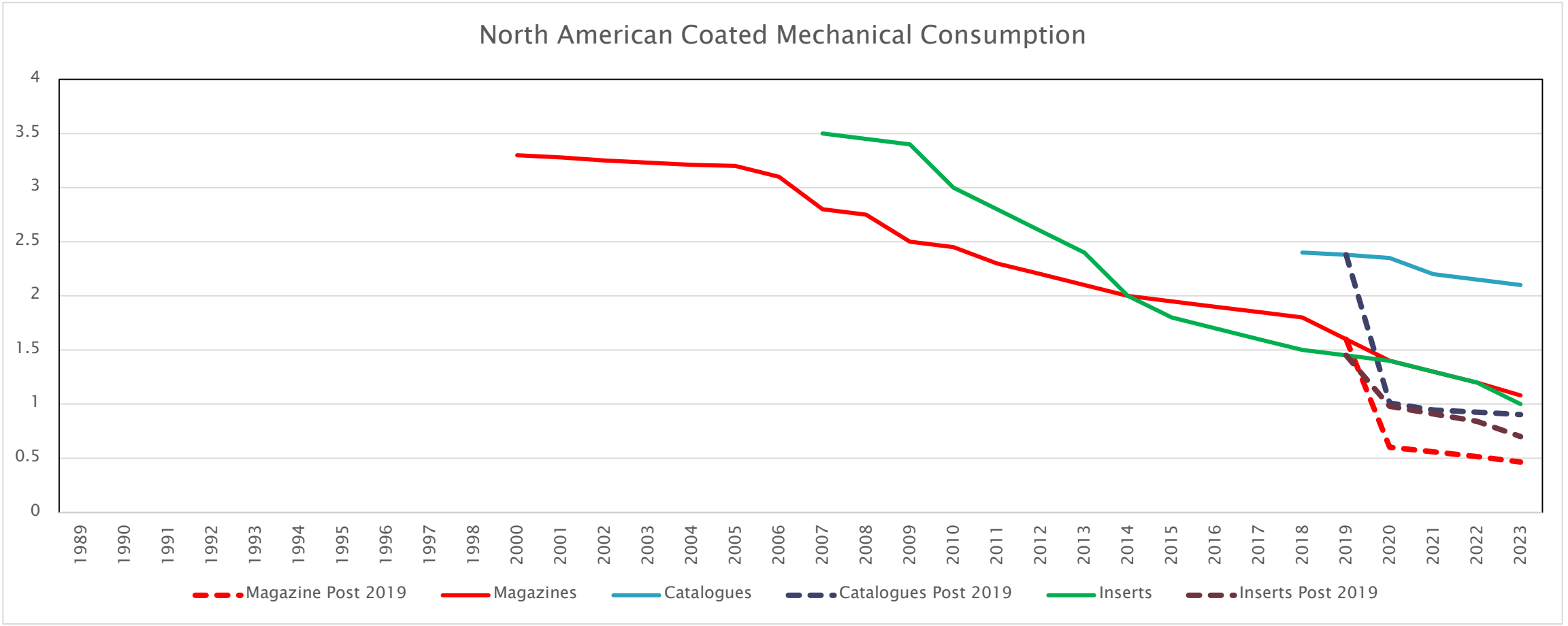
Graphic Papers – MAGAZINE & INSERTS

- Magazine / Inserts
- Large Decline in Magazine, Inserts (LWC)
- Average Yearly decline of approximately 12%
- Overall a smaller market as compared to Newsprint, UCFS, etc so less focus on decline

Graphic Papers – MAGAZINE & INSERTS

- New World 2020
  - Decline of 30% Year over Year 2020 Q2
  - The decline continues along the same consumer habits for newspapers, and information in general

Graphic Papers – MAGAZINE & INSERTS



Tissue & Towel

- NA & Europe growth in consumption has leveled off
- NA overbuilt capacity and driving prices down
- Expect another 2 years for capacity and demand to back in balance

Tissue & Towel

- New World 2020
  - Away From Home (AFH) market suffered tremendously –
    - Airline travel collapse
    - Business with remote work force
    - Retail business temporarily reduced hours & closures
  - Challenge –
    - High end product shortage for at home consumption

Market Pulp

- Types –
  - NBSK (Northern Bleached softwood Kraft)
  - SBSK (Southern Bleached Softwood Kraft
  - BHK (Bleached Hardwood Kraft)
  - BEK (Bleached Eucalyptus Kraft)
  - BCTMP (Bleached Chemical Thermo Mechanical Pulp)

Market Pulp

- Used primarily in producing the following grades–
  - Tissue / Toweling
  - Absorbent Products
  - White Top board
  - Folding Cartons
  - Printing & Writing

Market Pulp – cont.

- Pulp Demand heavily influenced by Chinese economy
  - Government agenda to raise the standard of living relative to health
  - Higher per-capita income allows for spending on more “convenience” items
  - Frequent new tissue/toweling machine startups in past 3 years

Market Pulp – cont.

- New World 2020
  - Consumption increasing in general to feed Tissue/Towel and Personal Care segments.
  - Market will see short term bumps and drops as world economies fluctuate due to COVID, political movements, etc.

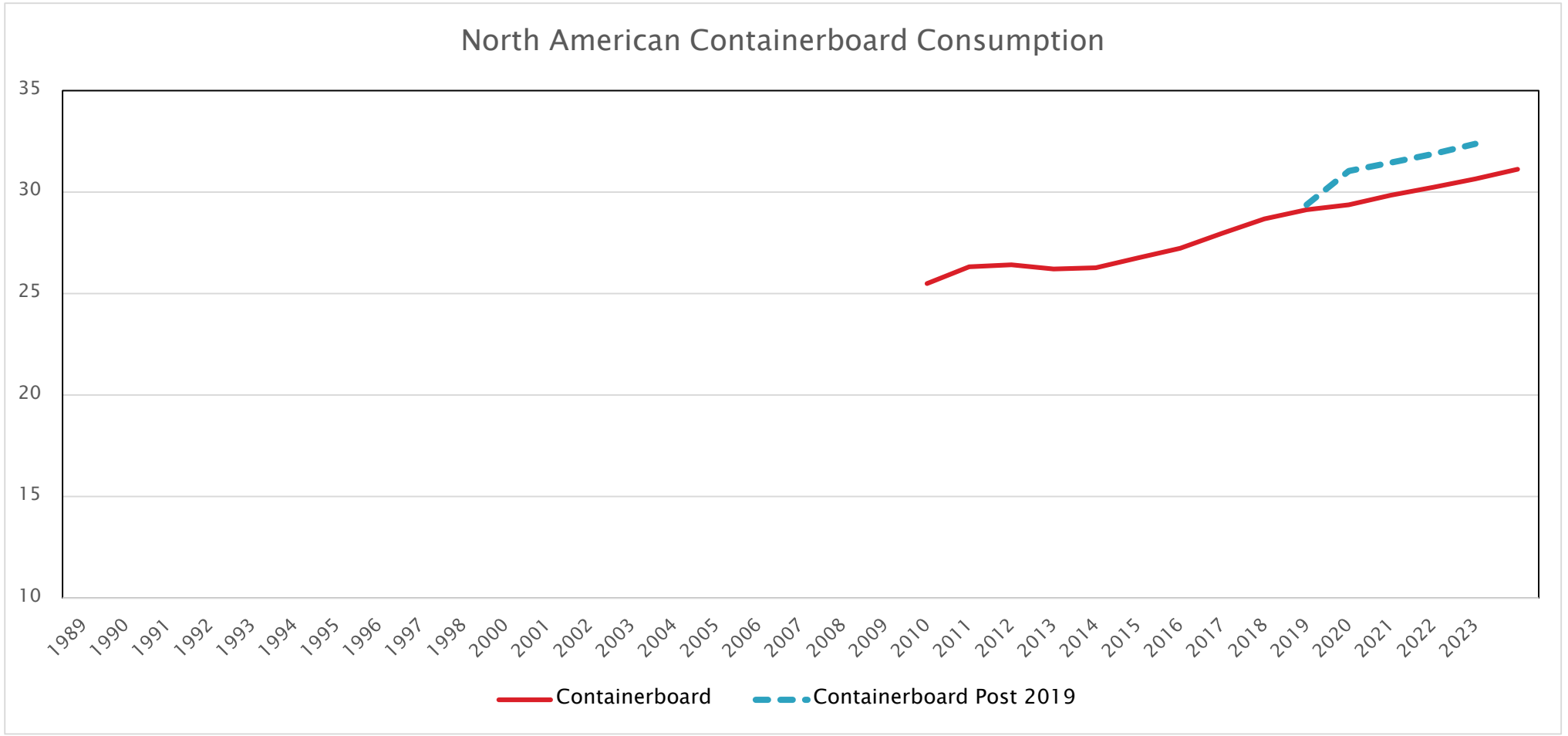
Containerboard

- Growth 2014 through 2018 was an average of 2.06% against a 28 million ton/yr market
  - Amazon effect
  - Corporate Sustainability Goals / Image
  - Recycle percentage will grow to meet demand as there will be no “Greenfield Mill built in the US in our lifetime”
  - Export demand will increase the pressure on US production as China strives to replace scrap paper with pulp.

Containerboard

- New World 2020
  - Increase in consumption expected to exceed projected growth (3.4% vs. 2.0% respectively) 2020 Q2 Year over Year
    - On-line shopping rapid escalation due to response to
      - Retail stores temporarily closed
      - Stay Home – Stay Safe
    - Accelerated move to lighter weight packaging as e-commerce companies strive to reduce their packaging consumption.

Containerboard



Bag & Specialty Kraft

- Anti-Plastic Bag Effect
  - West Coast is on a “single use plastic bag free” path conversion by 2020
    - Anti “Ocean of Plastics” agenda
  - Other major cities in North America on same path or already achieved similar legislation
  - Corporate strategies to improve their image and move away from plastics & Styrofoam – “Brown is the New Green”

Bag & Specialty Kraft

- Specialty Kraft
  - Used in Void Fill
  - Used in specialized packaging
- Corporate strategies for greener image
  - Important for fast food / quick food sector
  - Reduce/eliminate plastics in product protection (molded fiber)
- Large growth sector but volumes relatively small as compared to boxes

Bag & Specialty Kraft

- New World 2020
  - On-line retailers moving away from plastic film in Void Fill and shifting to paper
  - Large grocer chains continue to escalate move away from single use plastic bags outside of state and municipality driven bans.

Summary Points

- Printing & Writing Sector
  - Downward Trend
- Tissue & Towel
  - Flat to slight growth trend globally
  - Adjusting capacity to produce more “At Home Product”” and less Away From Home.
- Market Pulp
  - Tight Supply with majority of demand hinged on China’s Economy
  - Prices and capacity expected to increase with Tissue/Towelling & Personal Care as population ages

Summary Points

- Containerboard
  - Growth Trend 1-2% per year
  - Now seeing growth of nearly 4%
- Bag
  - Increased demand of lighter weight products and high recycle content as mandated by government or corporate strategies
- Specialty Kraft
  - Demand increasing as corporations move away from plastics

Paper Product Mills on the West Coast

- Significant mill closures on the US West Coast since early 2000's
- Mill closures often related to;
  - Existing market shrinkage
  - Environmental constraints
  - Quality and net cost of recycle raw material
- Mills that had capability to convert to other products have survived

Key Lead In Points

- Facilities with Virgin and Recycle pulp production can “swing” some ratio of production away from Recycle.
- This is a common option, for those with the capability, when wastepaper market prices are high and cost of producing fiber exceeds cost of Virgin fiber.

MIX Paper Quality Impact on Costs

- As the consumption level of MIX Paper increases, domestic and export, mills will continue sensitivity to contamination.
  - Disposal costs per ton of production, handling, transport and disposal costs will continue to escalate as mills increase demand on MIX Paper supply.
  - Top 3 Non-Fiber Contaminants
    - GLASS
    - RIGID PLASTICS
    - FILM PLASTICS

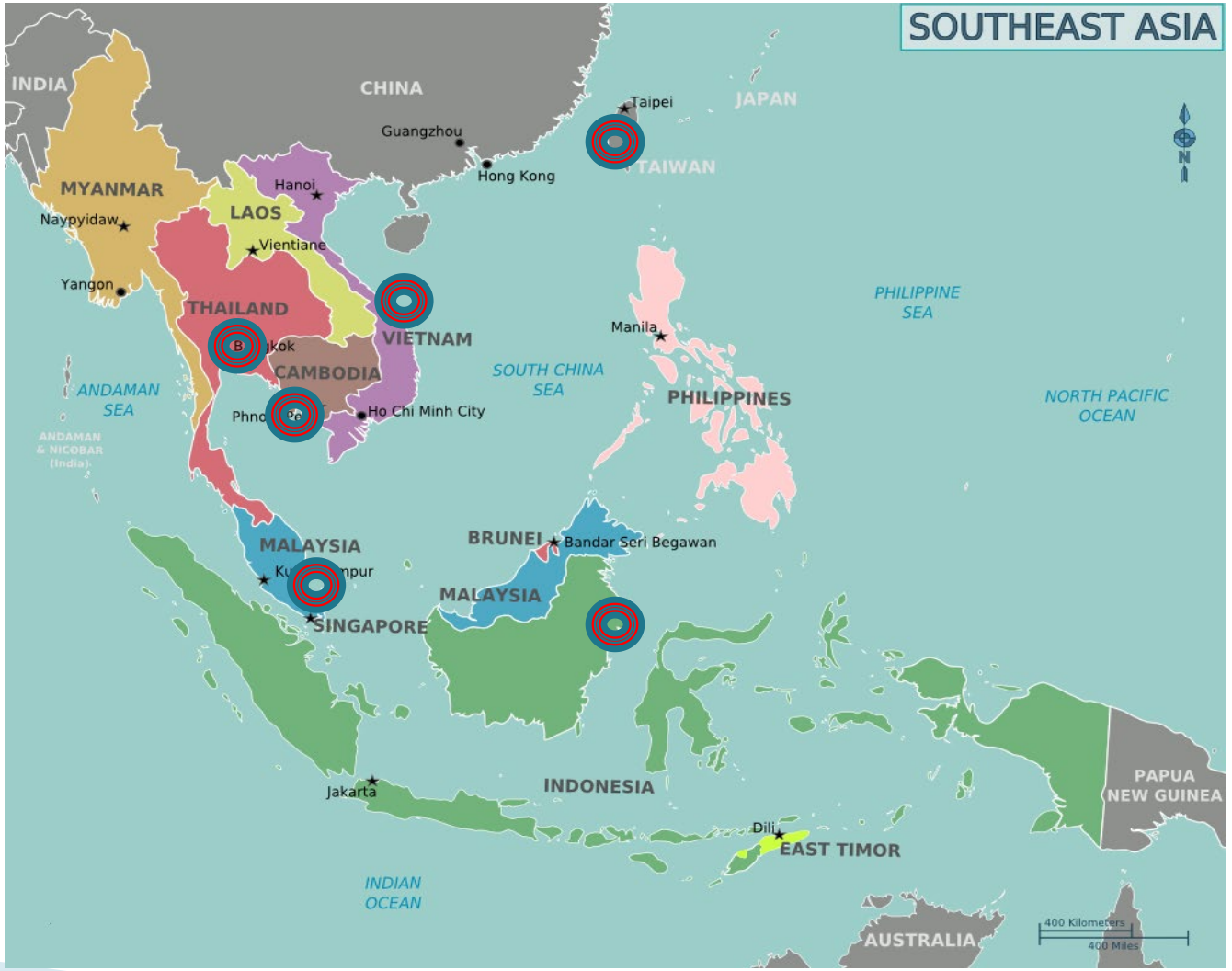
MIX Paper Quality Impact on MILL Costs

- Creating an improved quality of MIX Paper closest to ISRI standards will allow for successful marketing of material not only to, but also improved resilience to market changes in other countries.
- Creating an improved quality of MIX Paper will reduce the longer route, higher expenses, and overall higher carbon footprint of landfilling non-fiber, non-program, and contamination inherent in current collection programs.
- For domestic users to consume MIX Paper, the quality needs improvement sooner as compared to 2-3 years.

Where does West Coast MIX Paper Grades Go?

- China created a 20 Million Ton per Year shortage of fiber when the banned imports of all scrap paper in January 2021
  - Vietnam is discussing same quality requirements as China National Sword/Green Fence sequencing.
  - Cambodia threatening similar approach
  - Malaysia ?
  - Taiwan?
  - Indonesia receiving pressure from NGO's

Where Does West Coast MIX Paper Go?



What Can We All Do

- Paper is one of most recognizable and easiest waste commodities to collect and recycle into new products.
- Paper industry has been successfully accepting recycle fibers since the mid/early 1940's in significant volumes
- Promote paper recycling and increasing its' value by reducing non-paper contamination

American Forest & Paper Association

Trends in Paper Recovery

Washington Recycling Development Center Advisory Board

February 10, 2021

BETTER PRACTICES BETTER PLANET 2020
Continuing AF&PA's Commitment to Sustainability

About AF&PA

- Advances a sustainable pulp, paper, packaging and wood products manufacturing industry
- Fact-based public policy and marketplace advocacy
- Represents 84% of the U.S. pulp, paper, paper-based packaging and tissue capacity

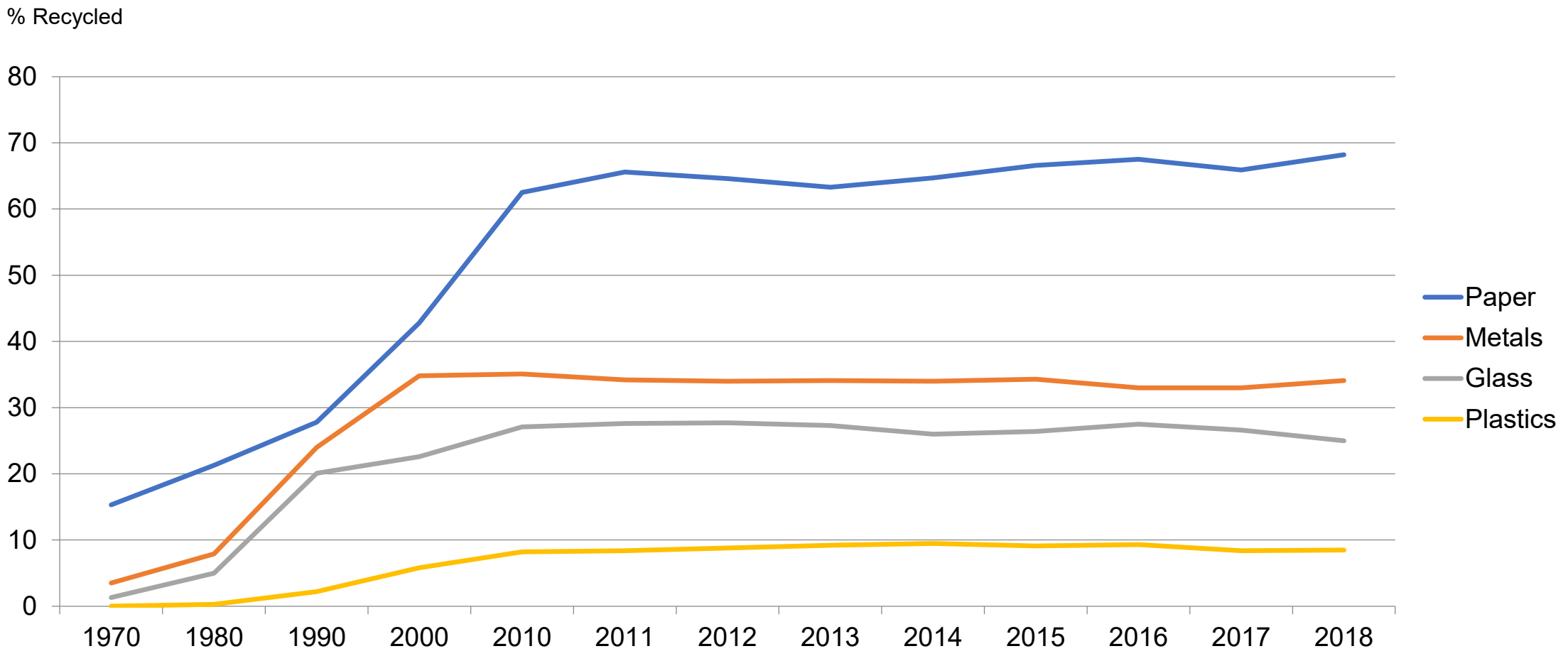
American Forest & Paper Association

The Paper Industry in Washington State

- About 8000 employees
- 13 mills and 69 converting facilities
- About $790 million in annual payroll
- Over $4.5 billion in products

American Forest & Paper Association

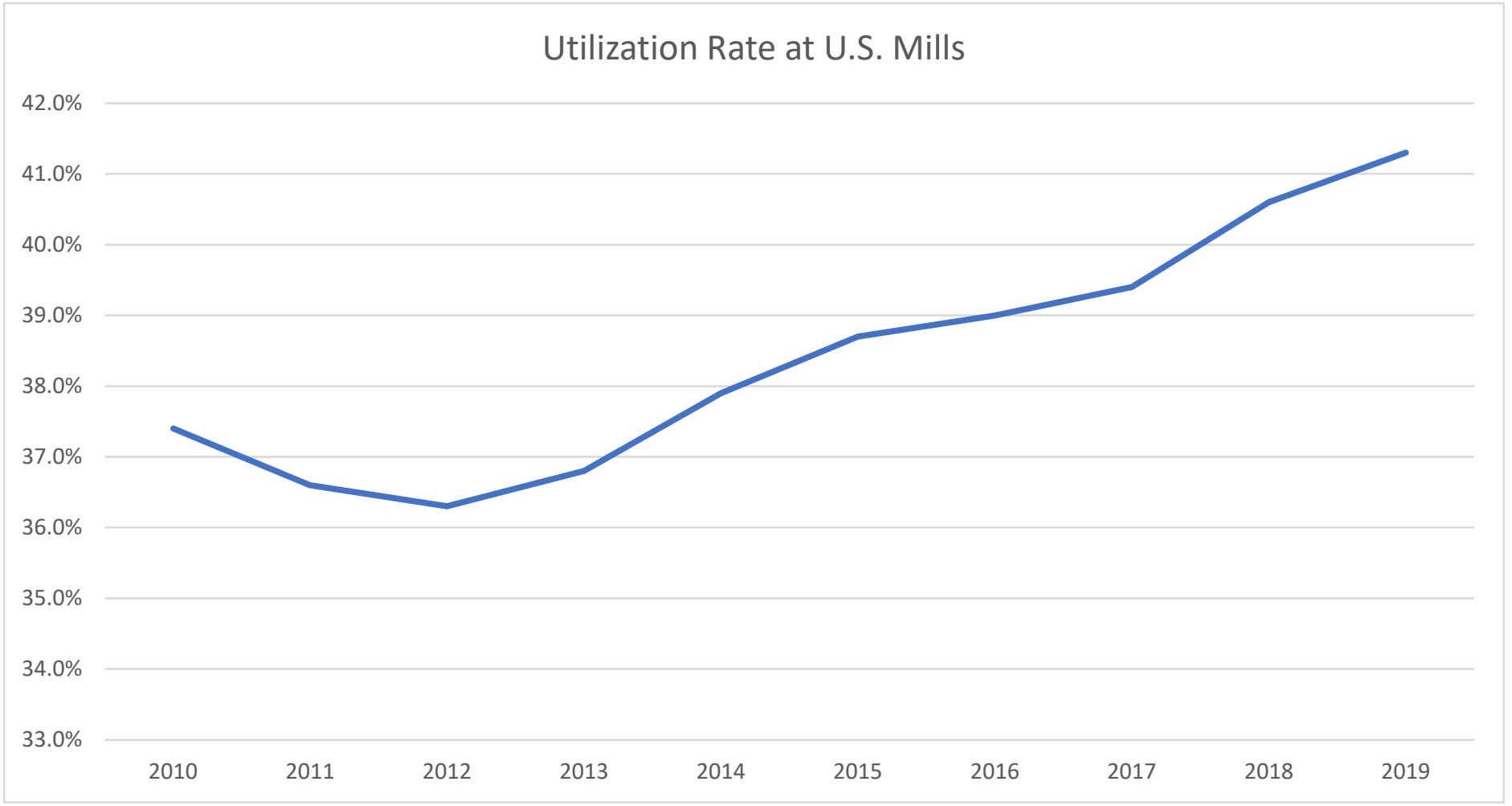
Paper Recycling vs Competing Materials



Source: U.S. EPA, Advancing Sustainable Materials Management Fact Sheet (2020)

American Forest & Paper Association

Recovered Fiber Utilization in Production 2010-2019

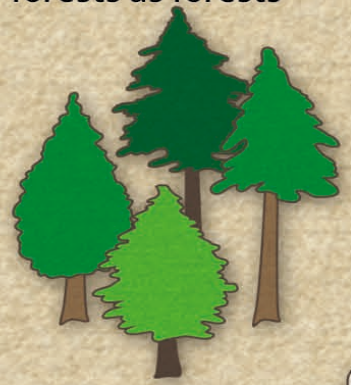


Source: AF&PA Statistics

American Forest & Paper Association

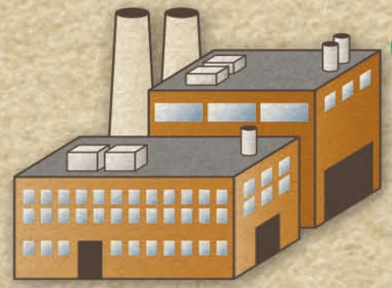
A Circular System:
How Paper is Made and Recovered for Reuse

1. Sustainable forest management helps keep forests as forests

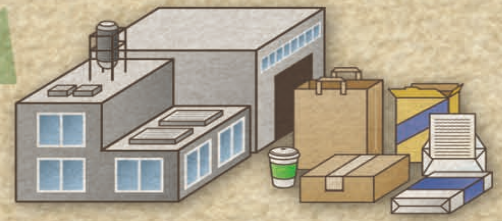


2. Paper products are made from a renewable resource - trees

3. Paper mills produce paper by combining wood pulp and/or recovered paper



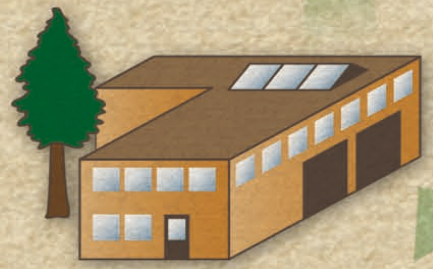
4. Plants convert paper and paperboard into products that can be recycled after use



5. Recyclable paper items come from homes, schools and businesses. Paper is the most recovered material by weight

6. Recyclable paper items are collected and delivered to recycling centers

7. Recovered paper items are sorted, cleaned and processed



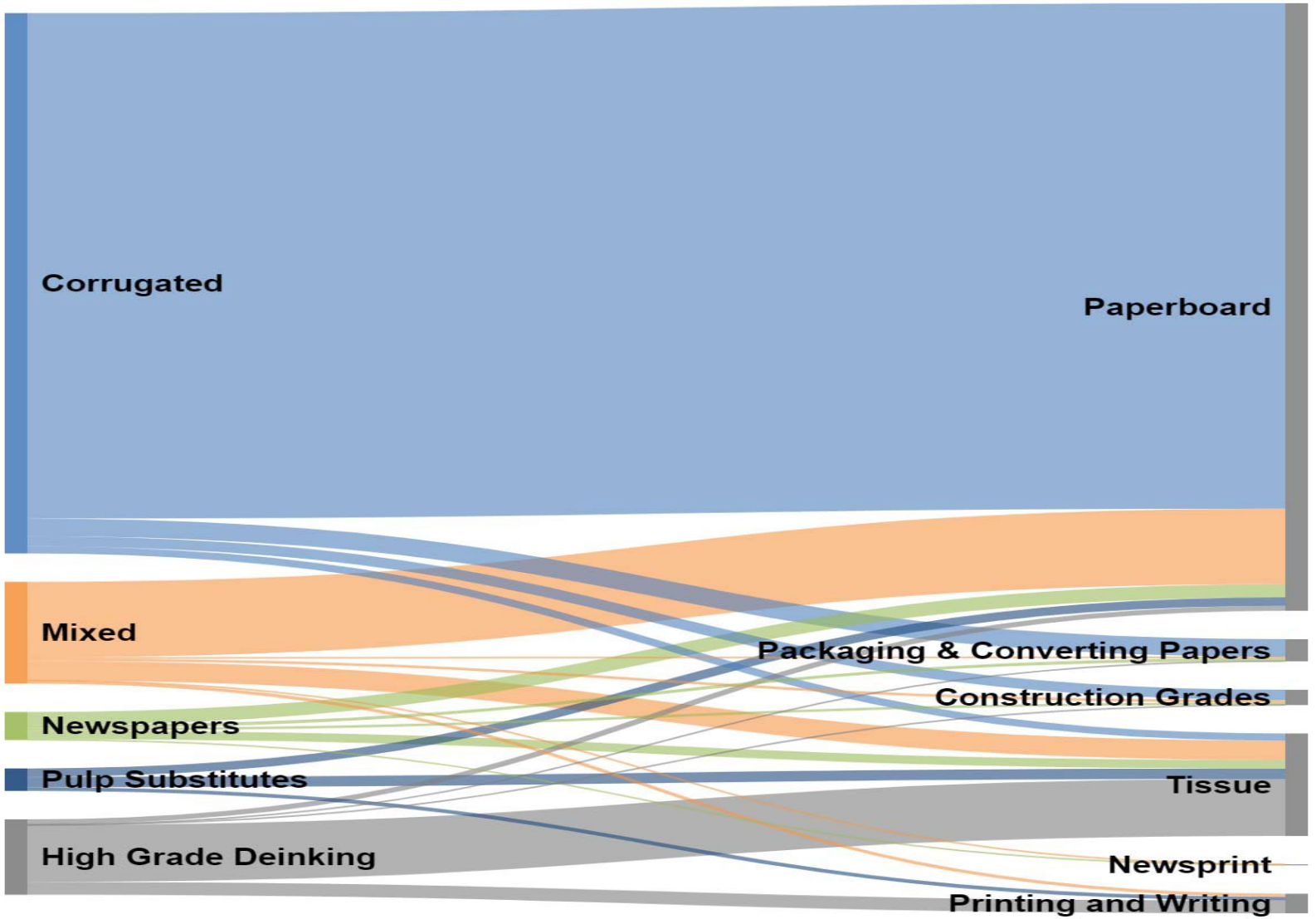
8. Recovered paper items are transported from recycling centers to paper mills

American Forest & Paper Association

2019 U.S. Recovered Paper Consumption By End Use

Grade of Recovered Paper

End Use



Source: AF&PA Statistics

American Forest & Paper Association

2019 Paper & OCC Recycling Rates

2019 Paper & OCC Recycling Rates		
	Total Paper	**OCC**
2018 Recycling Rate	68.1%	96.4%
2019 Recycling Rate	66.2%	92.0%
3-Year Average Recycling Rate		92.3%

- Key Drivers:
  - U.S. mill consumption -2.5%
    - U.S. mill consumption +1.0% (2017-19)
  - U.S. exports -13.6%
    - U.S. exports to China -30.2%

American Forest & Paper Association

Preliminary 2020

- U.S. recovered fiber mill consumption +2.3%
  - Mixed +2.5%
  - OCC +4.0%
- U.S. containerboard production +3.6%
  - Recycled +9.9%

Containerboard Export Destinations 2020

- USMCA 36%
  - Mexico 23%
  - Canada 13%
- Rest of Latin America 27%
- Asia 25%
  - China 14%
  - Rest of Asia 9%
- Europe 12%

Announced New Mill Capacity (2020-2022)

- Will consume OCC (or OCC & Mixed Paper)

Company	Location	Type	Capacity	Target
Packaging Corporation of America	Wallula, WA	Containerboard	350,000 TPY	Q4 2020
Port Townsend Paper	Port Townsend, WA	Containerboard	128,000 TPY	2020
Green Bay Packaging	Green Bay, WI	Containerboard	685,000 TPY	Q2 2021
Total Fiber Recovery	Chesapeake, VA	Market Pulp	250,000 TPY	2021
Empire Recycled Fiber	Fairless Hills, PA	Market Pulp	500,000 TPY	2022
Crossroads Paper	Utah	Containerboard	342,000 TPY	Q1 2022
Hudson Valley Paperboard	Albany, NY	Containerboard	300,000 TPY	Q1 2022
Domtar	Kingsport, TN	Containerboard	600,000 TPY	Q4 2022
Cascades	Ashland, VA	Containerboard	465,000 TPY	Q4 2022

Confirmed End Markets for Post-Consumer Paper Cups

Mixed Paper Markets

Essity
Barton, AL
Menasha, WI
Middletown, OH
South Glens Falls, NY

Georgia-Pacific
Green Bay, WI
Muskogee, OK

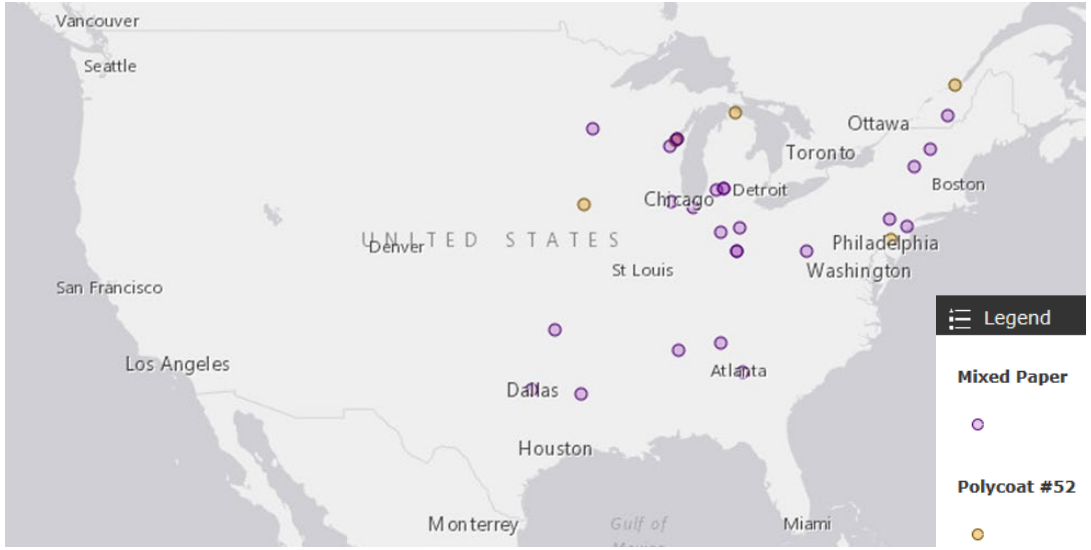
Graphic Packaging Int'l
Battle Creek, MI
East Angus, QC
Middletown, OH
Kalamazoo, MI

Green Bay Packaging
Green Bay, WI

ND Paper
Fairmont, WV

Pratt
Conyers, GA
Shreveport, LA
Staten Island, NY
Valparaiso, IN
Wapakoneta, OH

WestRock
Aurora, IL
Battle Creek, MI
Chattanooga, TN
Dallas, TX
Eaton, IN
Missisquoi, VT
St. Paul, MN
Stroudsburg, PA



Polycoat Markets

Continuus
Des Moines, IA
Philadelphia, PA

Great Lakes Tissue
Cheboygan, MI

Sustana
Levis, QC
DePere, WI

As of Feb 2021
Current end market list at www.recyclepapercups.org

Design Guidance for Recyclability of Paper-based Packaging

- Develop technical guidance for designing and manufacturing packaging to meet customers' needs in terms of recyclability.
  - Categorize what is easily recycled, less easily recycled and not recyclable
  - Inform individuals and groups that specify and design packaging and make determinations about the recyclability of packaging
- Timeline
  - Public Launch Early March 2021

Recommendations

- Markets for recovered fiber are efficient, dynamic, and complex
  - Minimize regulatory barriers
- Improve Quality of Collected Material
  - Manage Contamination
  - Consumer Education
- Recycling is a Business
  - Regulatory & Transportation Costs
  - Customer and Consumer Needs

American Forest & Paper Association

Thank You and Questions

Terry Webber

Executive Director, Packaging

terry_webber@afandpa.org

American Forest & Paper Association

American Forest & Paper Association

BETTER PRACTICES BETTER PLANET 2020
Continuing AF&PA's Commitment to Sustainability

Discussion

Based on the presentations and your own knowledge of paper and paper markets in Washington, what are the biggest issues that the Center should focus on?

Paper Summary

Board discussion

Washington
RECYCLING
DEVELOPMENT
CENTER

December 9th notes on paper

- **Data**: data gaps; metrics on contamination; price of recycled vs virgin; contamination
- **Education**: educate policy makers; bring light to the issues (like cost to improve paper bale doesn't result in significant return on the capital investment)
- **Analysis**: life cycle analysis; look at commercial sources (residential is such a small portion); look into the paper materials that are less desirable (mixed paper) for other uses
- **Policy**: what are smart policies for end markets (like EPR or recycled content mandate); evaluate source separated to get cleaner materials

Discussion

- What is the purpose of this ‘paper’?
- Who is the audience?
- What information is missing?
- What information should be removed?
- What are the next steps for the Recycling Development Center?

Meeting wrap-up

Washington
RECYCLING
DEVELOPMENT
CENTER

Wrap-up

- Next meeting: Wednesday, April 14, 2021
- April board meeting topic

- Notes from today will be posted next week
- Work on the paper summary

Thank you