



ASSOCIATION OF PLASTIC
RECYCLERS

How the production of new virgin plastic undermines recycling programs & What to do about it

CT DEEP Solid Waste Advisory Committee, October 2025

Who is APR?

APR is an international non-profit and the only North American organization focused exclusively on improving recycling for plastics.

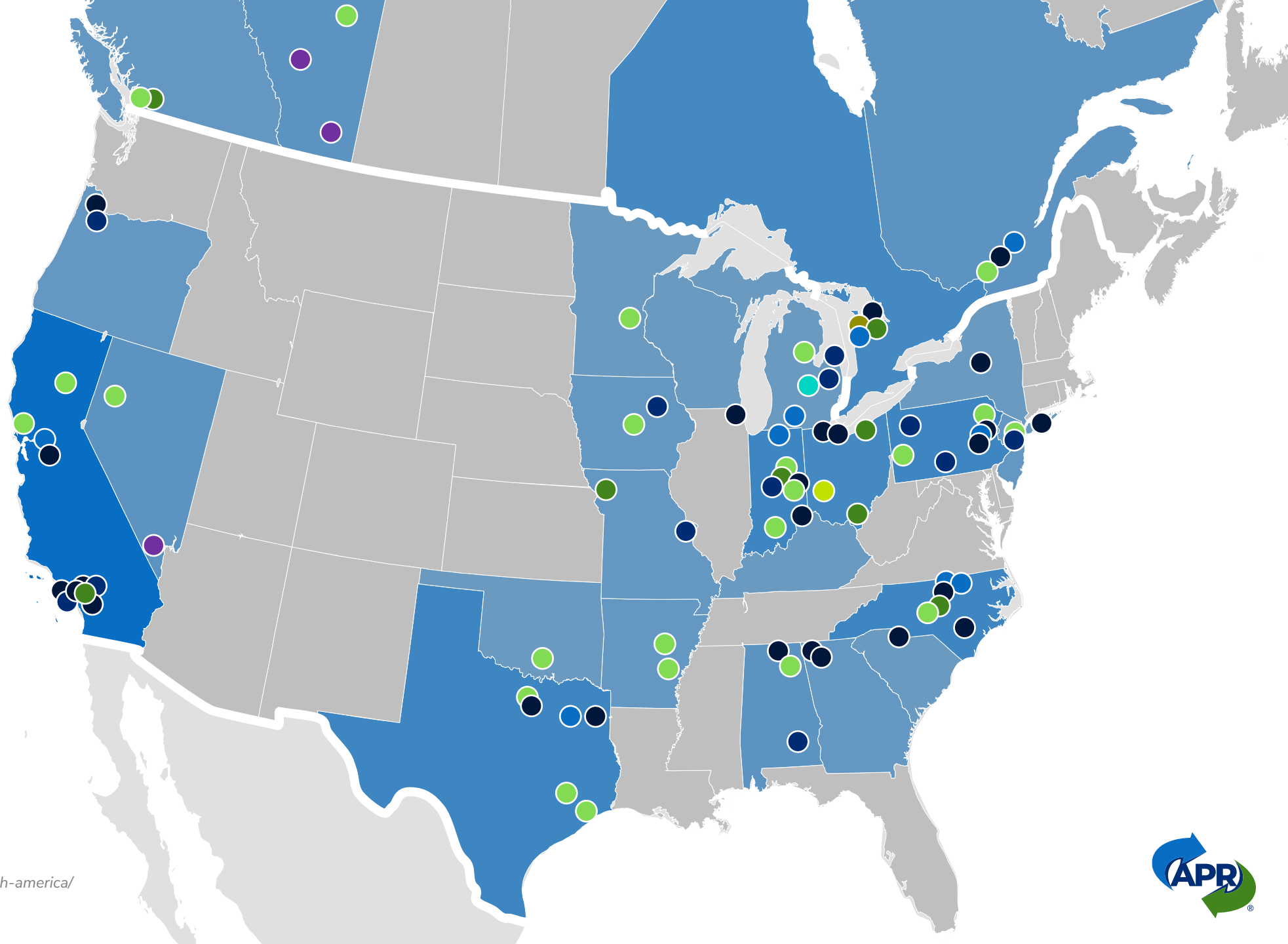


What Do We Do?

Our mission is simple:
RECYCLE MORE PLASTIC
to reduce waste.

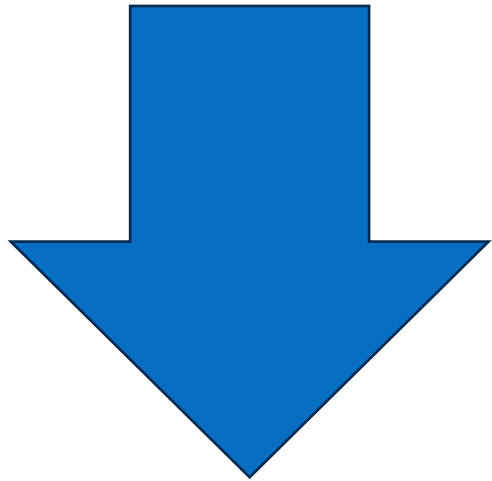
Plastic Recyclers in US & Canada: Mechanical and Physical Reclamation Sites

- PET
- HDPE
- PP
- Film
- HDPE/PP
- HDPE/Film
- PET/HDPE/PP
- HDPE/PP/Film
- PET/HDPE

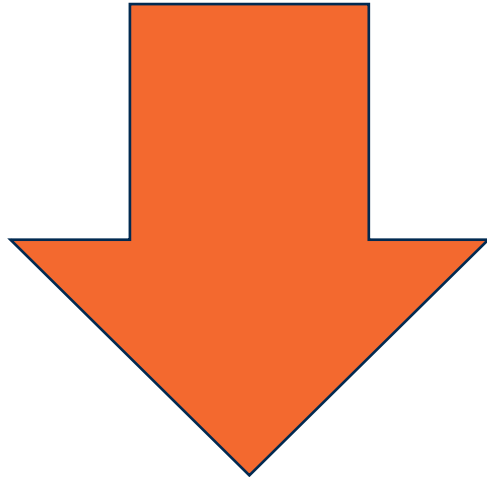


FOUR ECONOMIC ISSUES FACING RECYCLED PLASTICS

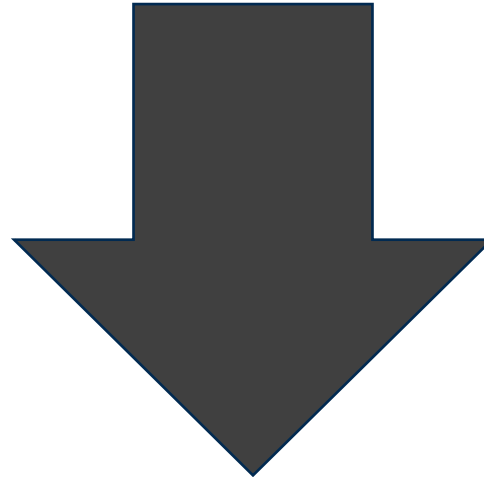
1. Low price
of new virgin
plastic



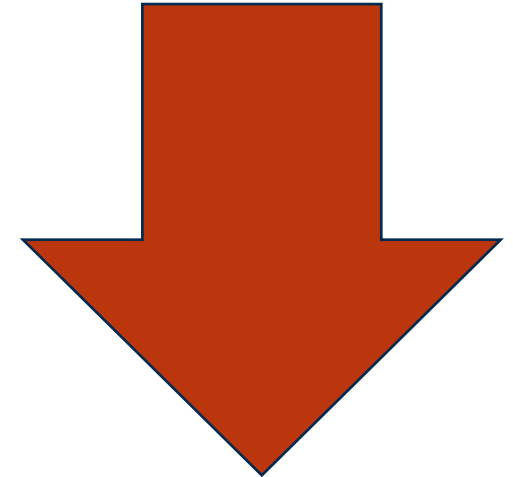
2. Excess
supply of
virgin plastic



3. Brands
back off
sustainability
targets

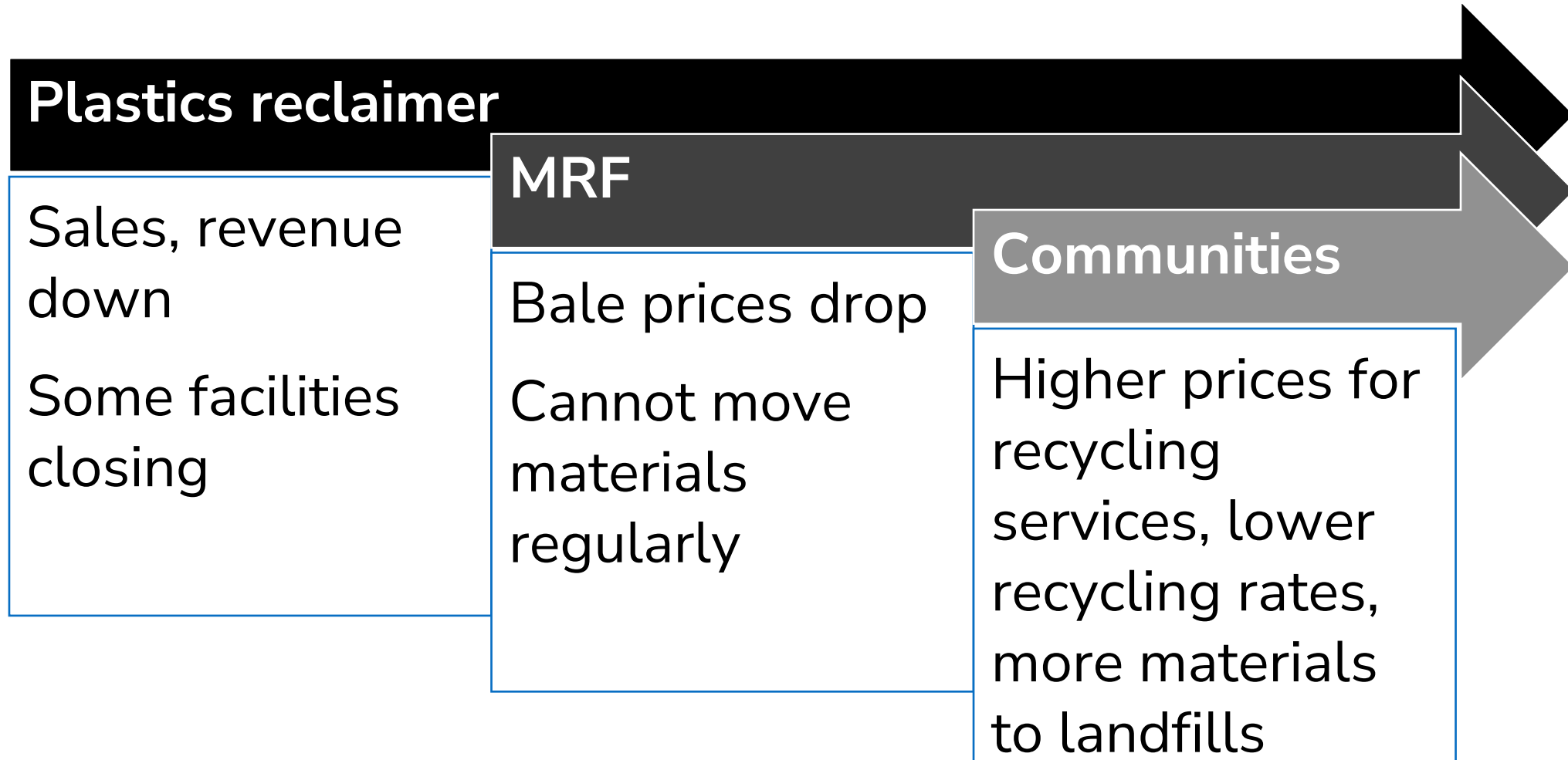


4. Influx of
imported
recycled
plastics

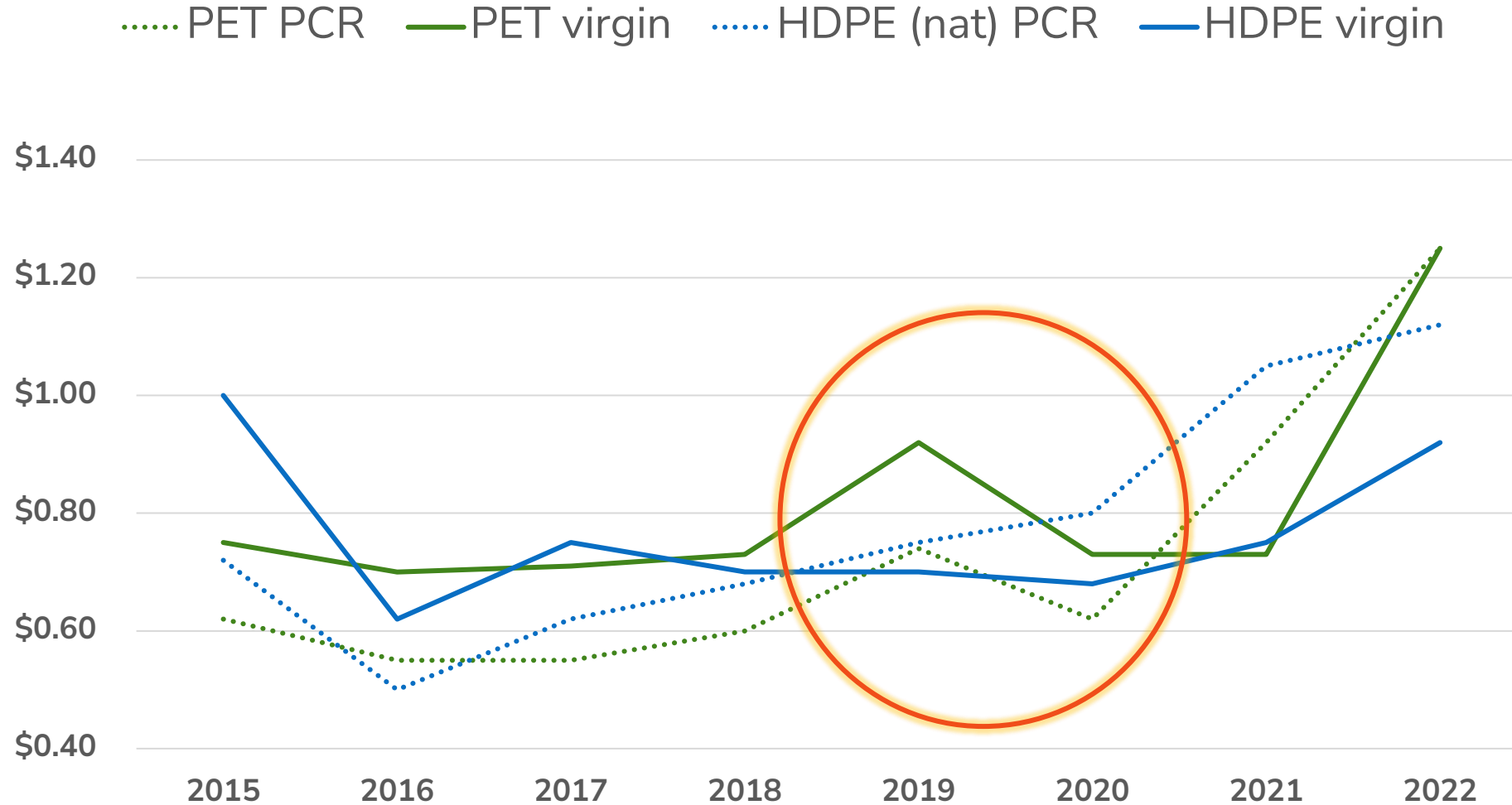


WHY THIS MATTERS TO LOCAL RECYCLING PROGRAMS:

TRICKLE DOWN IMPACTS → EVERYONE LOSES

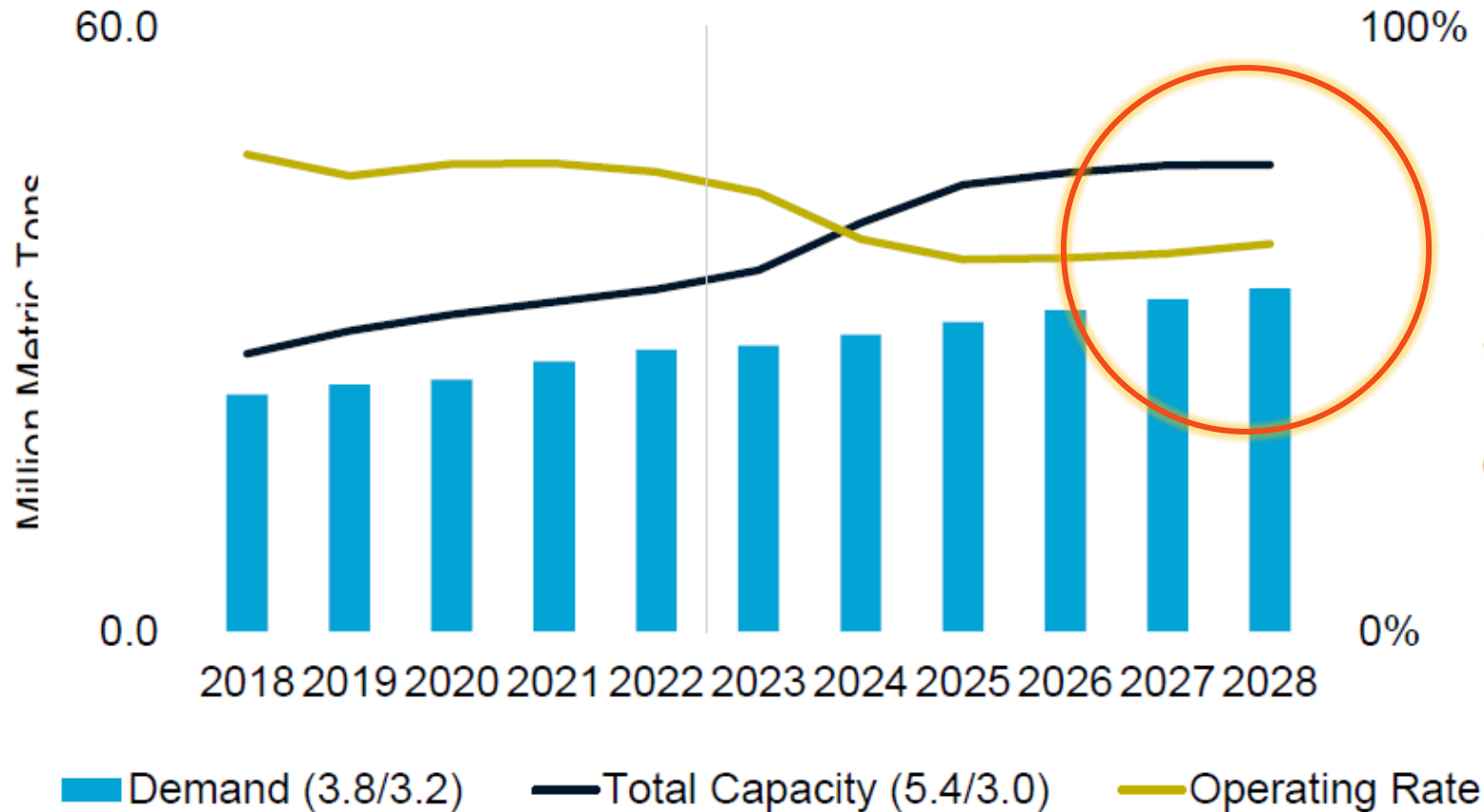


PROBLEM 1: VIRGIN PLASTIC IS NOW CHEAPER THAN RECYCLED PLASTICS



PROBLEM 2: TOO MUCH SUPPLY OF NEW PLASTIC PUSHES DOWN PRICES

World: PET supply & demand



(% AAGR = 18-23/23-33)

Source: Chemical Market Analytics by OPIS

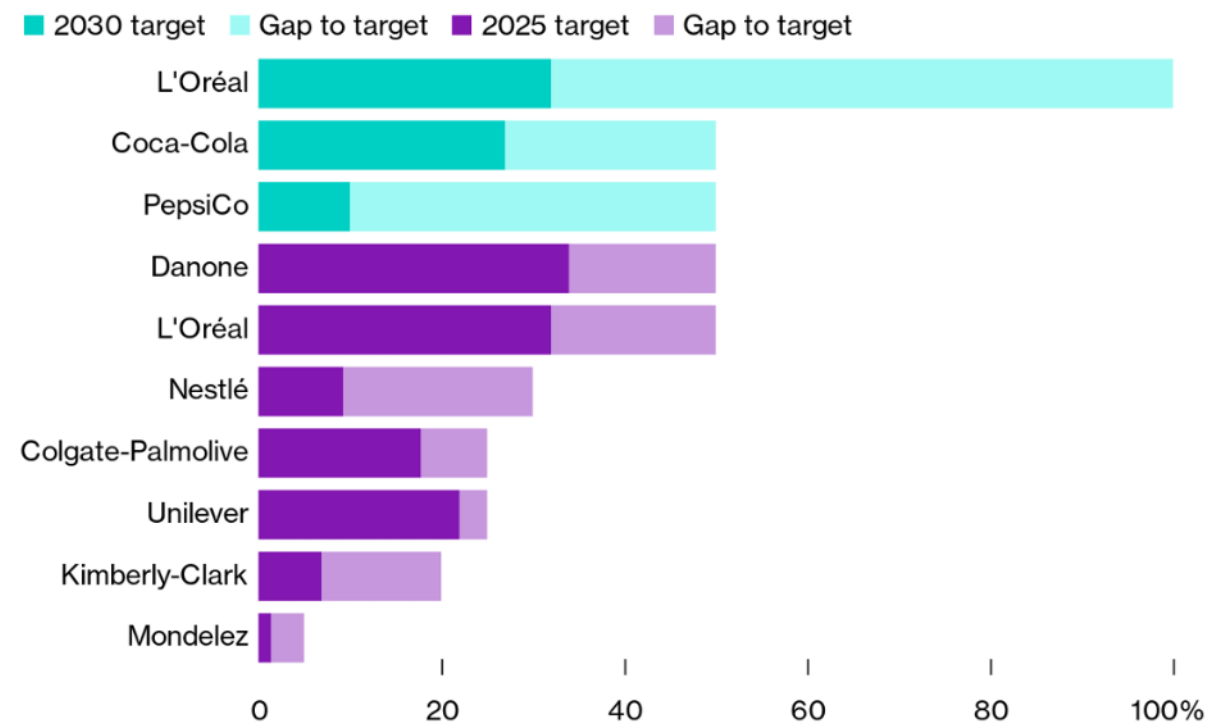
Attribution: Chemical Market Analytics by OPIS, a Dow Jones Company



PROBLEM 3: BRANDS PULL BACK FROM 2025 GOALS

- Companies fall short of 2025 targets
- Goals lowered and/or pushed back to 2030
- Plastics recyclers expanded to meet these goals and now cannot sustain operations if not sufficient demand
- Will there be recycling capacity to reach EPR recycling goals??

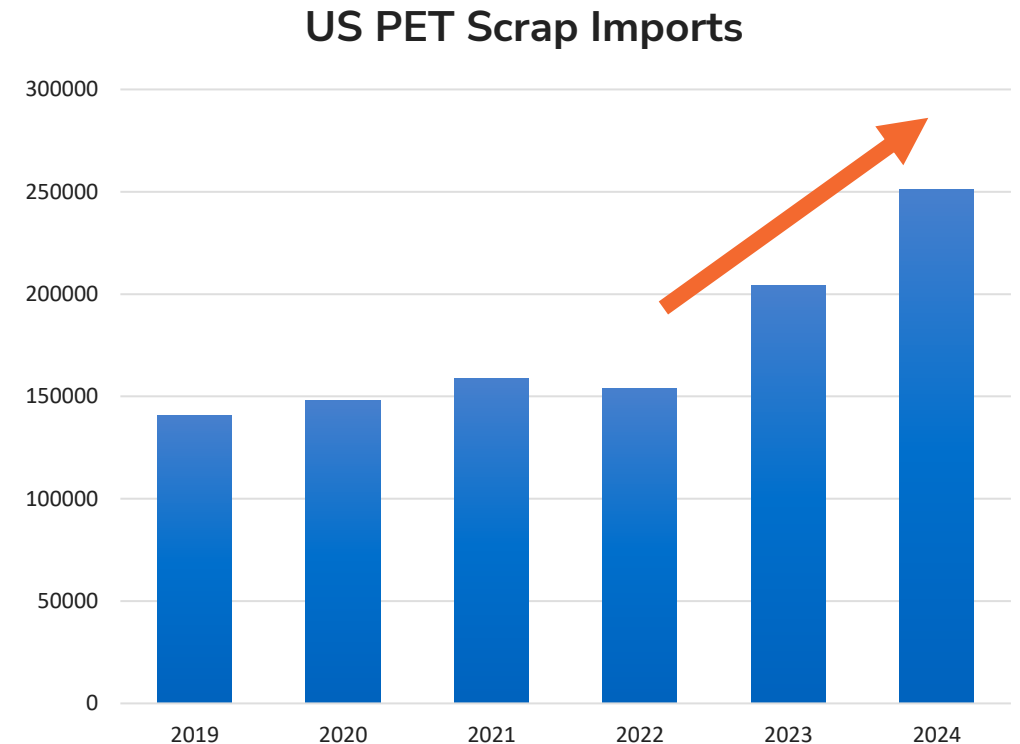
Selected brand owners' progress on recycled or bio-based content targets



Sources: Resource Recycling [Brand Sustainability Target Tracker](#)
Chart: [BloombergNEF, October 2024](#)

PROBLEM 4: SURGE IN IMPORTED rPET UNDERMINES US RECYCLERS

- Recycled PET (rPET) imports up 65% in 2 years
- Additional 100,000 metric tons
- Imports from Asia doubled
- Imported rPET significantly cheaper because of lower labor costs, lower env./social standards
- Recyclers are losing contracts, closing operations, scaling back
- PET/rPET excluded from federal tariffs until Sept 8th
- Tariffs may not be enough to promote domestic rPET



Data source: ICIS



EU RECYCLERS FACE SIMILAR CRISIS

- Plant closures totaling 1 million tonnes lost processing capacity since 2023
- New growth needed to reach aggressive recycling targets

Undermining factors:

- Low demand
- Imports from outside EU
- Low virgin prices
- High energy costs

August 27, 2025 02:42 PM

European plastic recycling industry facing 'imminent collapse', says PRE

19 Mar 2025

SHARE    

Crisis in EU Plastic Recycling Demands Immediate Action

March 19, 2025 11:33 AM

Recycling plant closures accelerate across Europe, says PRE

Plastics Recyclers Europe says the continent's industry is at a breaking point

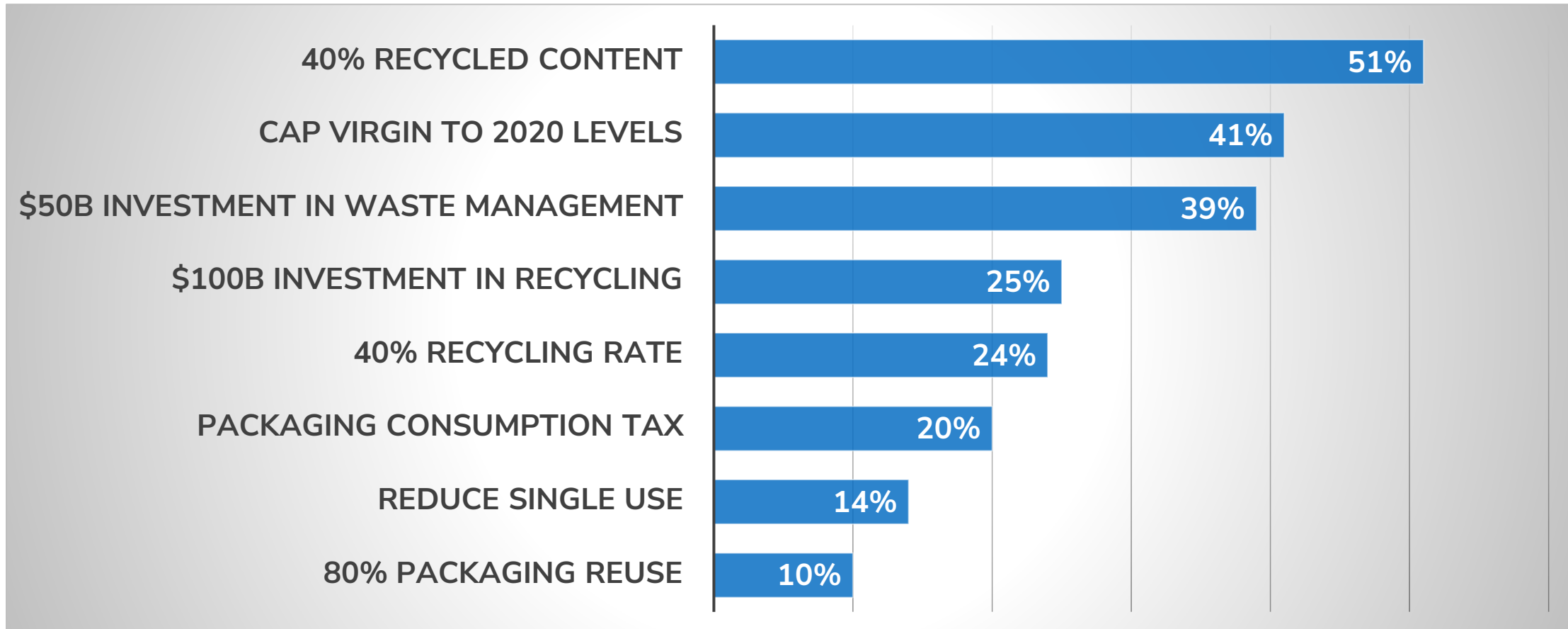


WHY IT MATTERS



STUDY SHOWS RECYCLED CONTENT IS STRONGEST GLOBAL POLICY TO REDUCE PLASTIC WASTE

PROJECTED REDUCTION IN GLOBAL PLASTIC WASTE MISMANAGEMENT BY 2050
UC BERKELEY STUDY, 2024: SCIENCE



Data sourced from <https://www.science.org/doi/10.1126/science.adr3837>



Using Recycled Plastic Saves Energy and Lowers Emissions

Recycling and using recycled materials is good for manufacturers, consumers, and the planet.



Reduce energy consumption by at least 79%

Reduce greenhouse gas emissions by at least 67%



HOW YOU CAN HELP



Adopt minimum recycled content requirements for all plastic products and packaging



Buy more North American recycled content plastics in procurement: roll carts, trash bags, trash bins, drainage pipe, pallets, and much more



Require reporting on country of origin and third-party certification of recycled plastics



Limit incentives to only recycled plastics collected from North American programs





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Thank you!