



Christopher E. Martino
County Executive


COUNTY OF PRINCE WILLIAM
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March 4, 2019

TO: Board of County Supervisors

FROM: Thomas Bruun 
Director of Public Works

THRU: Christopher E. Martino 
County Executive

RE: Presentation – Update on Changing Recycling Markets and Local Impact on
County Recycling Program

I. Background in chronological order is as follows:

- A. Virginia Mandates for Recycling – The County's Recycling Program was established in response to the Virginia legislation and solid waste planning and recycling regulations, which requires the County to recycle 25% of municipal solid waste (Section 9VAC20-130-125).
- B. County Solid Waste Management Plan - Section 9VAC20-130-120 also requires the County to prepare and maintain a Solid Waste Management Plan (SWMP), which, in part, lays out how the County will meet the mandatory recycling requirements. The County's 2004 SWMP set a voluntary goal of recycling 40% by 2015.
- C. Recycling Ordinance - In 1992, the Board ordained mandatory recycling, which required source-separation and expanded curbside recycling countywide. Materials included in the program included newspapers, glass, tin/aluminum cans and plastic bottles.
- D. County Recycling Center - In 1993, the County opened the Central Processing Facility at the County Landfill to process recyclable materials. SP Recycling Corporation, a newsprint producer, was hired to operate the facility and the curbside recycling program was subsequently expanded to include mixed paper and cardboard. With the decline of newspaper readership, SP Recycling

Corporation went into bankruptcy in 2011 and the contract was sold to National Paper Recycling in 2014. National Paper Recycling was unsuccessful in making the County Recycling Center profitable and was allowed an early termination of the contract in 2016.

- E. Shift from a County Facility to Privately-Owned Recycling Processing - In 2009, Canusa-Hershman opened the first state-of-the-art, single-stream recycling processing facility in the County. In 2014, American Disposal Service also opened a \$10 million single-stream recycling processing facility.
- F. Recycling in Current County Code - The list of recyclable materials required for separation and collection was updated in 2006. Section 22-170 of the Prince William County Code currently requires occupants of residential dwelling units within the County to source separate newspapers, mixed paper, container glass, plastic bottles and metal cans. Under the Code, materials may be added or deleted by the Director of Public Works with the approval of the County Executive.
- G. Current County Recycling Rate - For Calendar Year 2017, the County was recycling at the rate of 34.6%, substantially below the statewide average of 42.8%. The rate includes an allowable 5% credit for waste reduction programs. The 2018 data is currently being collected and a report is due to the Virginia Department of Environmental Quality (VDEQ) by April 30, 2019.
- H. Recent Collapse in Recycling Markets - In response to environmental concerns, China put the World on notice in 2013 that it would no longer continue to accept dirty or poorly sorted shipments of recyclable materials from foreign exporters, including the United States. In 2017, the National Sword initiative was launched with the goal of getting a better handle on the importation of solid waste, especially harmful materials. In January 2018, China imposed waste restrictions that affected 20 types of post-consumer plastics, prohibited five types of unsorted waste paper and lowered the contamination rates for cardboard and sorted paper to 0.5%. Established U.S. waste paper quality standards in place at that time allowed for 3-5% contamination. Other countries also adopted more stringent waste importation requirements. The result is the worst decline in recycling market conditions in over 30 years.
- I. Complaints from Haulers about Rising Recycling Processing Cost – In February 2018, local waste haulers began to raise concerns regarding rising processing cost and lack of availability in local processing facilities. Costs have more than doubled over the past few months, and are significantly higher than waste disposal fees. Some haulers indicated that they were having trouble accessing local processing facilities and the County cited several haulers for disposing of recyclable materials as regular trash.

- J. The Problem with Glass – Glass recycling has been a challenge in Virginia for many years. Glass processed at single-stream recycling facilities must be further processed at glass beneficiation facilities in order to be usable to glass container manufacturers. There are no glass beneficiation facilities in Virginia. Due to the weight of glass, it is impractical to ship it to beneficiation facilities in North Carolina and Pennsylvania. As a result, the majority of glass is disposed of as residue at landfills.
- K. Regional Response to Waste Importation Restrictions – Waste import restrictions imposed by China and other nations have triggered changes to recycling programs all across America and the Metropolitan Washington Council of Governments has held several meetings to discuss this issue. Among the changes being looked at include removing glass from the curbside recycling programs, adopting a more regional chart of acceptable materials for recycling and looking at regional marketing of recycling materials. At this time, no regional agreement has been recommended.

II. Current Situation is as follows:

- A. Prince William County Waste Industry “Recycling Summit” - The County held a Recycling Summit for permitted waste collectors and recycling processors serving Prince William County on February 6, 2019. The purpose of the summit was to discuss the local impact of the waste import restrictions and determine potential solutions. One of the issues discussed at that meeting was the potential removal of glass and other materials from the list of mandatory materials to be recycled in Prince William County. The consensus at the end of the summit was that no action would be taken until the group reconvened in March giving time to gather advice and input from policy makers before making changes to the recycling requirements in the County Code.
- B. Release of Information to the Public from the Waste Summit - On February 8, 2019 one of the haulers who attended the Waste Summit decided to make changes to its programs and sent notice of such to a large number of homeowners’ associations. The notice, effective February 18, 2019, stated that the hauler would only accept #1 and #2 plastics, aluminum, tin food, drink cans and corrugated cardboard for recycling. The hauler directed customers to place glass and mixed paper in County recycling sites or to place in the regular trash. The notice resulted in an influx of calls and emails to the Solid Waste Division for clarification and additional information. A majority of the callers had no idea about the issues with recycling markets or glass recycling.
- C. Public Information and Press Release - On Friday, February 22, 2019, a press release was issued by the Communications Office summarizing the current recycling market conditions and explaining that the materials for separated

recycling collection is under review and will be updated once final decisions are made.

- D. Final Recommendations Being Developed - County staff is meeting with local recycling processors and regional partners to determine what changes should be made in the County's recycling program considering current market conditions and costs. A final recommendation will be made at the Board meeting scheduled for March 19, 2019.
- E. No Formal Board Action Needed - Any changes in the program can be made administratively by the Director of Public Works, with the approval of the County Executive.

Attachments: Recycling Program and Market Update PowerPoint Presentation

Staff Contact: Thomas Smith, x6252



Prince William County Government
Board of County Supervisors




Recycling Program and Market Update

Tom Smith
Department of Public Works
March 19, 2019

Overview of Recycling Market Challenges

- Recycling in Virginia is a significant part of our economy with more than \$1.9 billion in economic impact
- This important industry is facing significant challenges as a result of recent market upheaval



Recycling = Commerce

Commerce is Good for America

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Recent History of Market Restrictions

CHINA WASTE IMPORT RESTRICTIONS: TIMELINE



For more information visit SWANA.org/ChinaResources

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Materials Affected

CHINA WASTE IMPORT RESTRICTIONS: MATERIALS AFFECTED

POST-CONSUMER PLASTIC WASTE

- Soft drink bottles
- Water bottles
- Takeout containers
- Milk jugs
- Juice bottles
- Cleaning supplies
- Shampoo
- Grocery bags
- Cereal box liners
- Condiment containers
- Produce bags
- Bread bags
- Garbage bags
- Beverage cups
- Yogurt cups
- Margarine tubs
- Plastic film
- PET
- Polystyrene
- PVC



BANNED RECYCLABLES

- Unsorted waste paper of various grades, such as:
- Old mail
 - Paperboard packaging
 - Magazines
 - Copy and computer paper
 - Egg cartons

LOWER CONTAMINATION RATES 0.5%

- Cardboard
- Sorted paper

For more information visit SWANA.org/ChinaResources



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Why is China Doing This?

- China is under public pressure to get a better handle on solid waste importation, especially harmful materials
- Seeking to replace imported waste with domestic resources
- Ensure the safety of the natural environment
- Crack down on the smuggling of foreign waste
- Strengthen conservation and use of natural resources
- Build a more beautiful and prosperous society

Source: Notice of the General Office of the State Council on Issuance of Reform and Implementation Plan to Enhance Solid Waste Import Management System by Prohibiting the Entry of Foreign Waste Chinese Government Network July 27, 2017

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Changing Values of Recycling Commodities

Recycled Material Loses Value

Value of an average ton of recyclable material at a North Carolina sorting facility from spring 2011 to winter 2016-17:



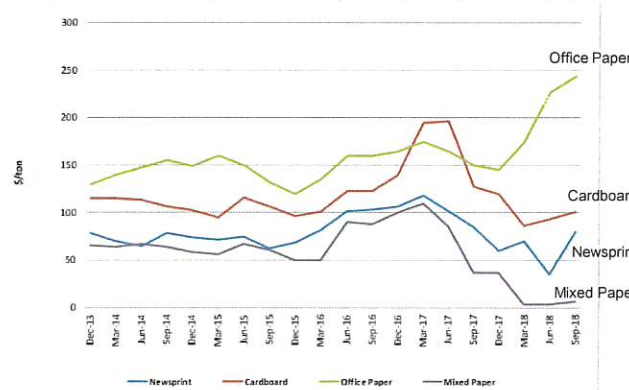
SOURCE: North Carolina Department of Environment and Natural Resources, Recycling Program and Market Update, USA TODAY

USA TODAY

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Changing Values of Recycling Commodities

Waste Paper Values: 2013 - 2018



Drops in pricing for cardboard, newsprint, and mixed paper have significantly lowered value of "single stream" recycling

Source: North Carolina Department of Environmental Quality
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Local Impacts

- Increased cost for recycling processing charged to refuse haulers
- Reduced processing capacity due to higher quality standards and high contamination
- Greater residual amount (non-recyclable material) from recycling processors to landfills

How has Current Market Situation Affected Glass Recycling?

Glass and “Single-Stream” Recycling Don’t Mix



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Quality of Recycling is Everyone's Job



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What is Virginia Doing?

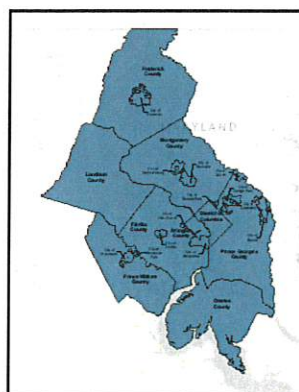
- Virginia has been silent during recycling markets crisis
- Has not provided any guidance despite some Virginia localities announcing the suspension of their recycling programs



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What is the Region Doing?

- COG is monitoring issue through the Recycling Committee
- Some of the issues being looked at include regional marketing and a common materials list
- Region is complex and so it has been a challenge to get everyone to agree on how to respond



Metropolitan Washington
Council of Governments

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What is Prince William County Doing?

- Prince William County is working issue with counterparts through COG
- “Recycling Summit” with processors and haulers held in February 2019
- Revisions to its “do’s” and “don’ts” list
- Re-opening the Recycling Building at the County landfill through RFP process
- Proposed Updates to Chapter 22 of the County Code (Refuse)

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Short Term Steps

- Encourage everyone to reduce the amount of waste generated
- Revise the acceptable materials list for recycling from residents – revisions can be made by Director of Public Works with approval of County Executive
 - ◆ Remove glass (separate drop-off points)
 - ◆ Remove some plastic containers
 - ◆ Clarify type of paper desired

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New Recycling Materials List



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Planned Community Outreach

Target Audiences:

Haulers, residents, multi-family, schools, businesses, community groups

- Media Releases/Articles
- Informational flyers and brochures
- SW web page update; New A to Z Disposal widget
- Social Media; Everbridge; Email; Newsletters
- Presentations and Events
- Paid Advertising
- Direct Mail/Hauler Bills

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Long Term Steps

- Continue to reduce the amount of waste generated and buy products in recyclable packaging
- Implement separation requirements for yard waste
 - ◆ New facility at Balls Ford Road is under construction
 - ◆ Large amount of organic material in waste stream
 - ◆ Local markets for products
- Pursue new waste separation and conversion technologies

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Questions?

*Tom Smith, Chief
Solid Waste Division
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What are Other States Doing?

- Extended producer responsibility
- Solid waste reduction studies
- Encouraging more domestic use of compostable or recyclable materials
- Research and development, marketing and processing for recycled commodities and products
- Establishing minimum recycled content standards for plastic
- Encourage the recycling of rigid plastic containers
- Developing a marketplace for single-use plastic recycling
- Programs that stimulate the use of recyclable materials domestically

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Improvements to the Balls Ford Compost Facility



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