



RECYCLING MARKET

Development Plan

FREQUENTLY ASKED QUESTIONS

1. Why is the Plan being created?

In 2019, the Texas Legislature passed Senate Bill (SB) 649, which requires the development of a Recycling Market Development Plan to examine the current recycling economy in Texas, discover opportunities for growth, and draft a proposal for action. The bill also includes the creation of a comprehensive educational campaign to cover the economics of recycling in Texas, highlight businesses that are involved in recycling in Texas, and to reduce contamination. The Recycling Market Development Plan will build upon the efforts of prior recycling studies in Texas, including the Study on the Economic Impacts of Recycling (SEIR), released in July 2017, which provided quantitative data about the Texas recycling industry's input in the Texas economy. For a copy of the SEIR report and links to other related studies, please visit the project website at www.txrecyclingstudy.org.

The Recycling Market Development Plan will take an updated look at the economics of the recycling industry in Texas and will provide details about the current and needed infrastructure to manage the state's recyclables as well as various recommendations on how to support and grow the Texas recycling industry. Additionally, an educational campaign will be developed highlighting the economic benefits of recycling, companies in Texas utilizing recycled feedstock, and contamination reduction messaging. Through a competitive bidding process, the Texas Commission on Environmental Quality (TCEQ) has retained Burns & McDonnell to complete the project.

2. What is considered "recycling"?

The Plan will define recycling based on the definition found in Texas Health and Safety Code Section 361.421(8). This defines "recycling" as a process by which materials that have served their intended use or are scrapped, discarded, used, surplus, or obsolete are collected, separated, or processed and returned to use in the form of raw materials in the production of new products. Recycling includes:

- (A)** the composting process if the compost material is put to beneficial reuse as defined by the commission;
- (B)** the application to land, as organic fertilizer, of processed sludge or biosolids from municipal wastewater treatment plants and other organic matter resulting from poultry, dairy, livestock, or other agricultural operations; and
- (C)** the conversion of post-use polymers and recoverable feedstocks through pyrolysis or gasification.

The Plan will focus on municipal solid waste (MSW), post-consumer recyclables, and industrial waste, and will utilize the Texas Health and Safety Code (THSC) definition for MSW found in Section 361.003(20) and the THSC definition for industrial solid waste found in Section 361.003(16). MSW is defined as “solid waste resulting from or incidental to municipal, community, commercial, institutional, and recreational activities, and includes garbage, rubbish, ashes, street cleanings, dead animals, abandoned automobiles, and other solid waste other than industrial solid waste.” Industrial solid waste is defined as “solid waste resulting from or incidental to a process of industry or manufacturing, or mining or agricultural operations.”

3. Which materials will the Plan cover?

The Plan will cover materials as defined in Section 361.0152(a)(3), “Recyclable material,” which includes paper, plastic, metal, glass, vegetative waste, compost, mulch, tires, electronic waste, construction and demolition debris, batteries, and paint.

The Plan does not apply to ferrous or nonferrous metals recycled by a metal recycling entity as defined by Section 1956.001, Occupations Code.

4. Who will be surveyed?

The Project Team, led by Burns and McDonnell, will survey recycling processors and end markets to collect information on recyclable materials diverted from the MSW and industrial waste streams.

5. Is participation voluntary?

Yes, participation in the Plan is voluntary.

6. How is this plan different than the SEIR study?

SEIR provided a baseline recycling rate and limited job information. This plan intends to utilize the methodology of SEIR, with a focus on the economic impacts of the recycling industry in Texas, and additionally develop a plan to stimulate the use of recycled materials as well as a comprehensive educational campaign about recycling and contamination reduction.

Lastly, the Recycling Market Development Plan will not only document current recycling efforts, but it will also provide useful information such as:

- What materials are generated but not being recycled;
- The economic benefits of recycling;
- The available capacity of existing manufacturers to use sorted recyclables as raw materials;
- What is preventing the use of recyclable materials to make new products, and solutions to remove barriers;
- Companies or facilities needed to ensure generated recyclable materials are used to make new products; and
- Recommendations for increasing use of recyclable materials overall and growing the number of companies that consume recyclables as feedstock.

For more specific detail on what economic information SB 649 instructs the Plan to include, download a copy of the bill text from the project website at www.txrecyclingstudy.org.

7. How will the project address the confidentiality of the data?

As with SEIR, the Recycling Market Development Plan will request recycling and economic data from private recycling companies through a voluntary, online survey. SEIR achieved an excellent response rate for a state-level, voluntary program, and a high level of participation will be crucial moving forward with this project, as well. To encourage participation, Burns & McDonnell will take every measure allowed by law to protect confidentiality and is developing a confidentiality plan that will be available for review this spring.

8. Is this something that can be used to compare Texas to other states?

Some states have recycling market development methodologies and several states report recycling quantities and rates but comparing that information nationally has been challenging historically. Some states may utilize different definitions of recycling that might include activities like energy recovery or reuse, while some states may also have mandatory reporting requirements for recycling facilities, potentially resulting in higher recycling rates. The various means used to stimulate recycling market development also vary by state. This should be kept in mind when considering comparing SEIR data or the results from the Recycling Market Development Plan to data reported by other states.

9. How can I help with the survey?

As was the case with SEIR, Burns & McDonnell will be conducting a voluntary statewide survey to measure recycling and its economic impacts in Texas. Beginning June 1st, 2020, Burns & McDonnell will ask recycling processors and end users to participate in a confidential, online survey. The survey will close on August 31st, 2020. Please let us know if you would like to participate in the survey and encourage other industry representatives and recyclers in Texas to contribute to this effort. Contact information for this project is included in Question 11, below.

10. What time period does the data cover and when will the Plan be complete?

The Recycling Market Development Plan will reflect recycling activity and economic information for the 2019 calendar year. There will be an interim report on the Plan delivered by September 1, 2020. The Plan is expected to be complete by September 1, 2021, with results included in the TCEQ report, "Municipal Solid Waste in Texas: A Year in Review."

11. How can I find more information about the survey?

For more information on the Recycling Market Development Plan:
www.txrecyclingstudy.org

For questions, please contact Scott Pasternak (spasternak@burnsmcd.com) at Burns & McDonnell.