

A photograph of four women standing in a line, viewed from behind. They are all wearing teal-colored t-shirts. The woman on the far left has long dark hair. The second woman from the left is wearing a black baseball cap with "The Recycling Partnership" written on it. The woman on the far right has short dark hair. They are all standing with their arms around each other's waists, suggesting a sense of unity and teamwork. The background is a blurred outdoor setting with green foliage.

Who We Are

**The Recycling Partnership is the U.S. nonprofit
solving recycling's toughest challenges, together.**



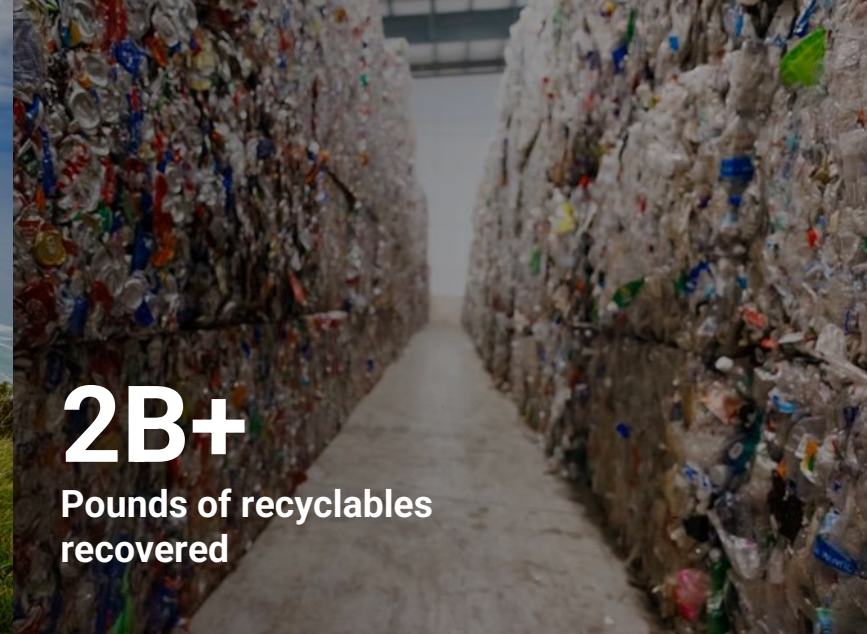
2M+

Carts delivered across
the U.S.



1 in 5

Americans live in states with EPR policies
that we helped shape



2B+

Pounds of recyclables
recovered



20%

Invested in more than 20%
of U.S. material recovery facilities



200+

Active grants — expanding access,
boosting capture, and system building



2.6M

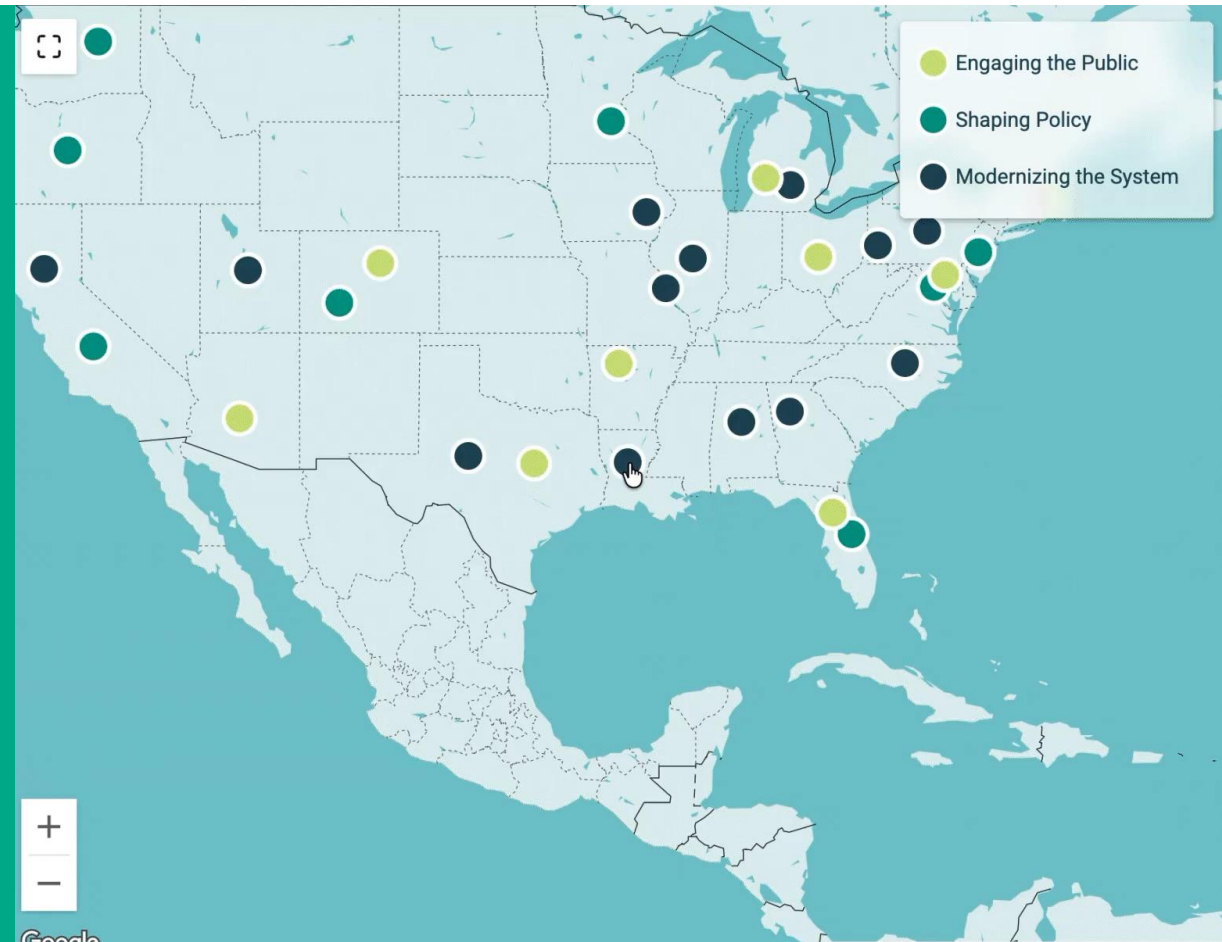
Metric tons
of CO₂e avoided

Community by Community. State by State.

Zoom In On Progress

This is the highlight reel, not the full story. Every win reflects deeper work, and the momentum to spark more across the country.

Explore the Map



What must be true for a healthy U.S. recycling system?



- 1 Design for Recycling:** All packaging needs to be designed for recyclability.
- 2 Ability to Recycle:** All households need access to recycling in their home.
- 3 Public Participation:** Residents need to fully engage in recycling.
- 4 Recycling Infrastructure:** Recycling facilities need to effectively process the material.
- 5 Old Stuff → New Stuff:** Recycling facilities need sufficient end markets.

Balancing Recycling System Needs



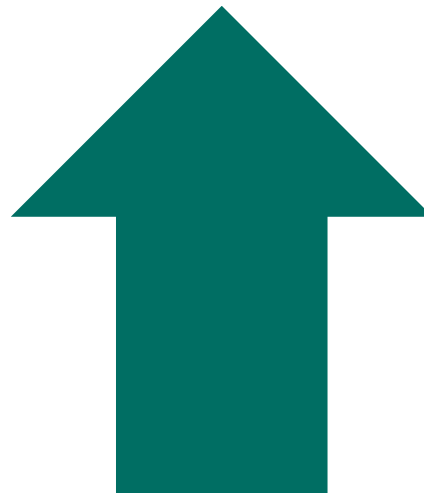
Resident confidence is eroding:

to capture more plastic packaging, people have to participate in the recycling system locally and see themselves as part of the solution



The system is out of sync:

with more supply, the rest of the system must be ready to receive and circulate it, supporting domestic supply chains

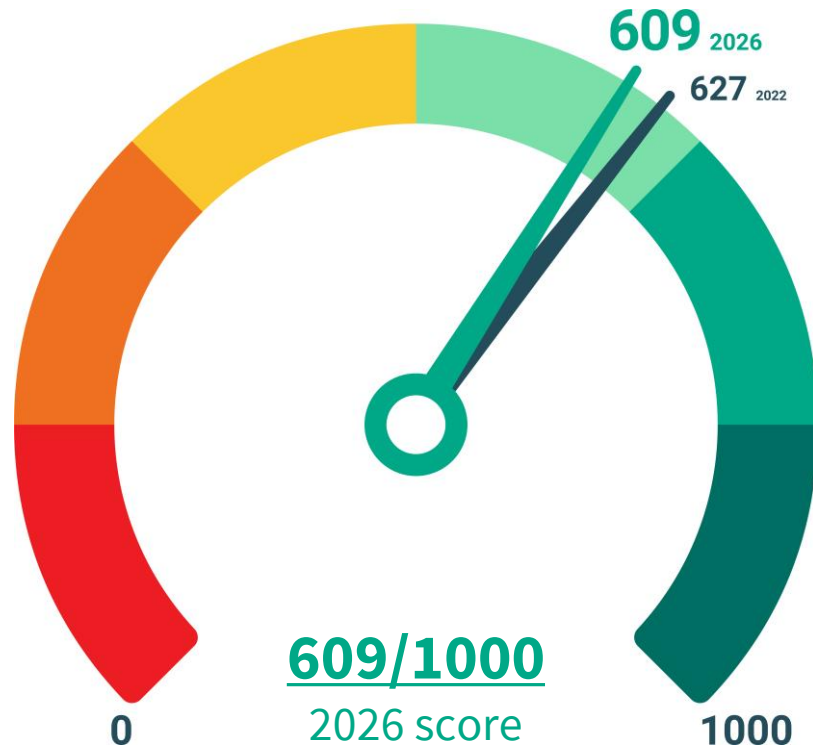


The solution is system-wide pre-investment to:

- ✓ boost resident confidence and increase participation, and
- ✓ capture and circulate more plastic packaging.

Key Insight: Recycling Confidence Index 2026

What the research tells us about confidence



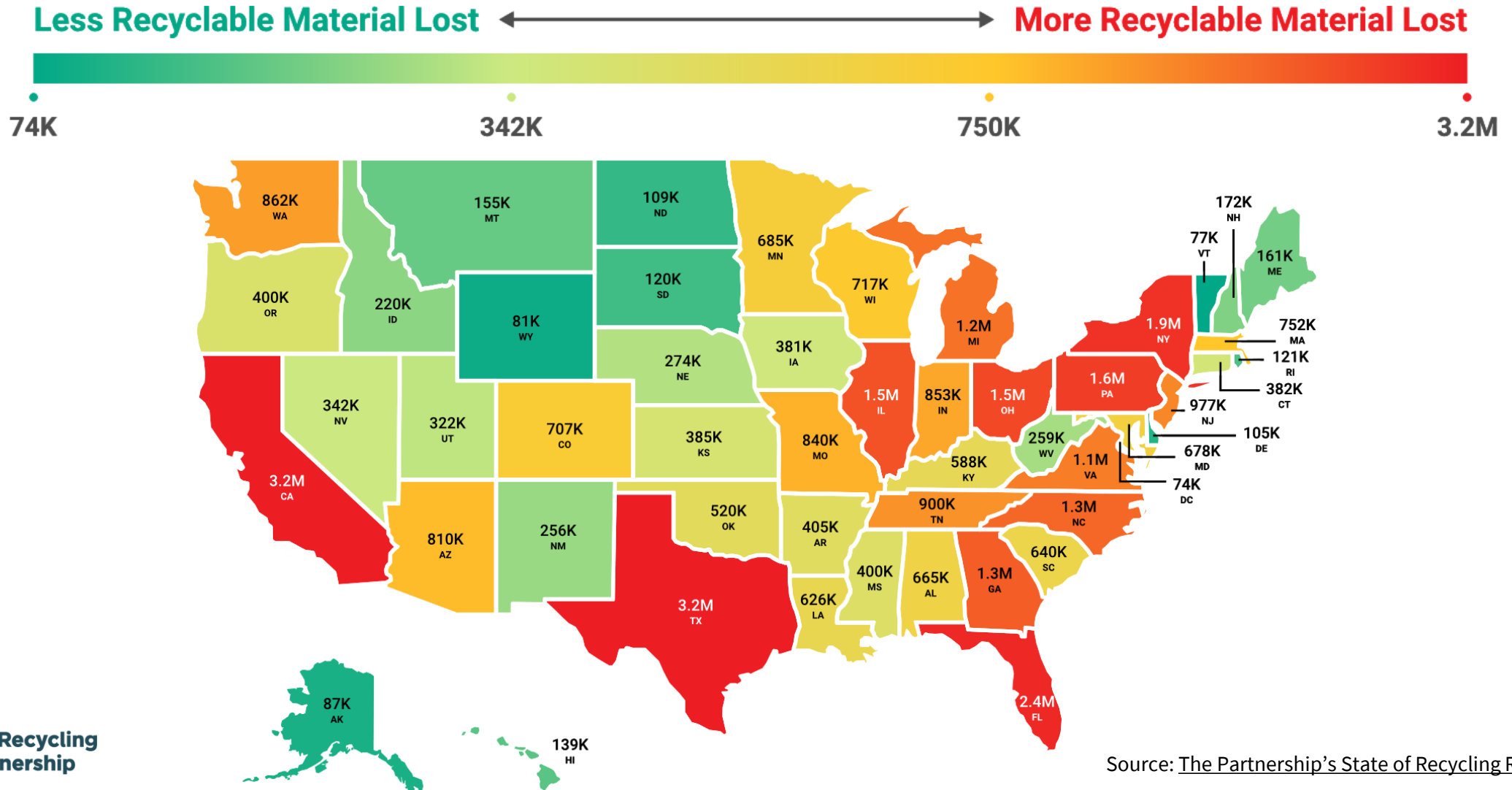
Overall, confidence has declined since 2022.

Drivers of eroding confidence:

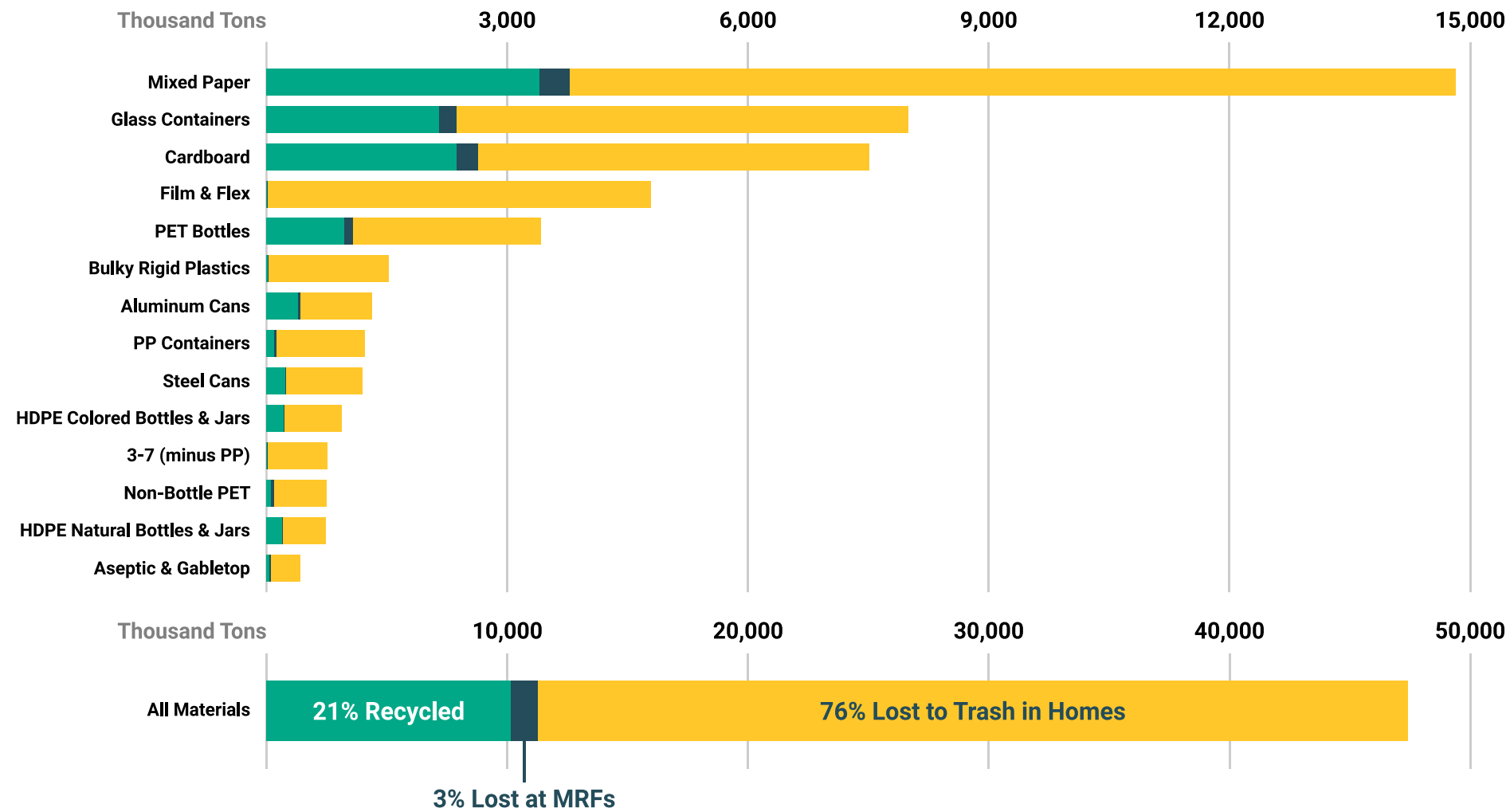
- Perception that materials are not recycled
- Misinformation about how the system works
- Lack of visible local norms around recycling
- Signals from local service providers and programs
- Low confidence in one's own self-efficacy

37 MILLION Tons of Recyclable Material Still Lost Each Year

(State-by-State Residential Recyclable Material Lost in Tons Per Year)



76% of Residential Recyclables Are Lost to Trash In Homes*



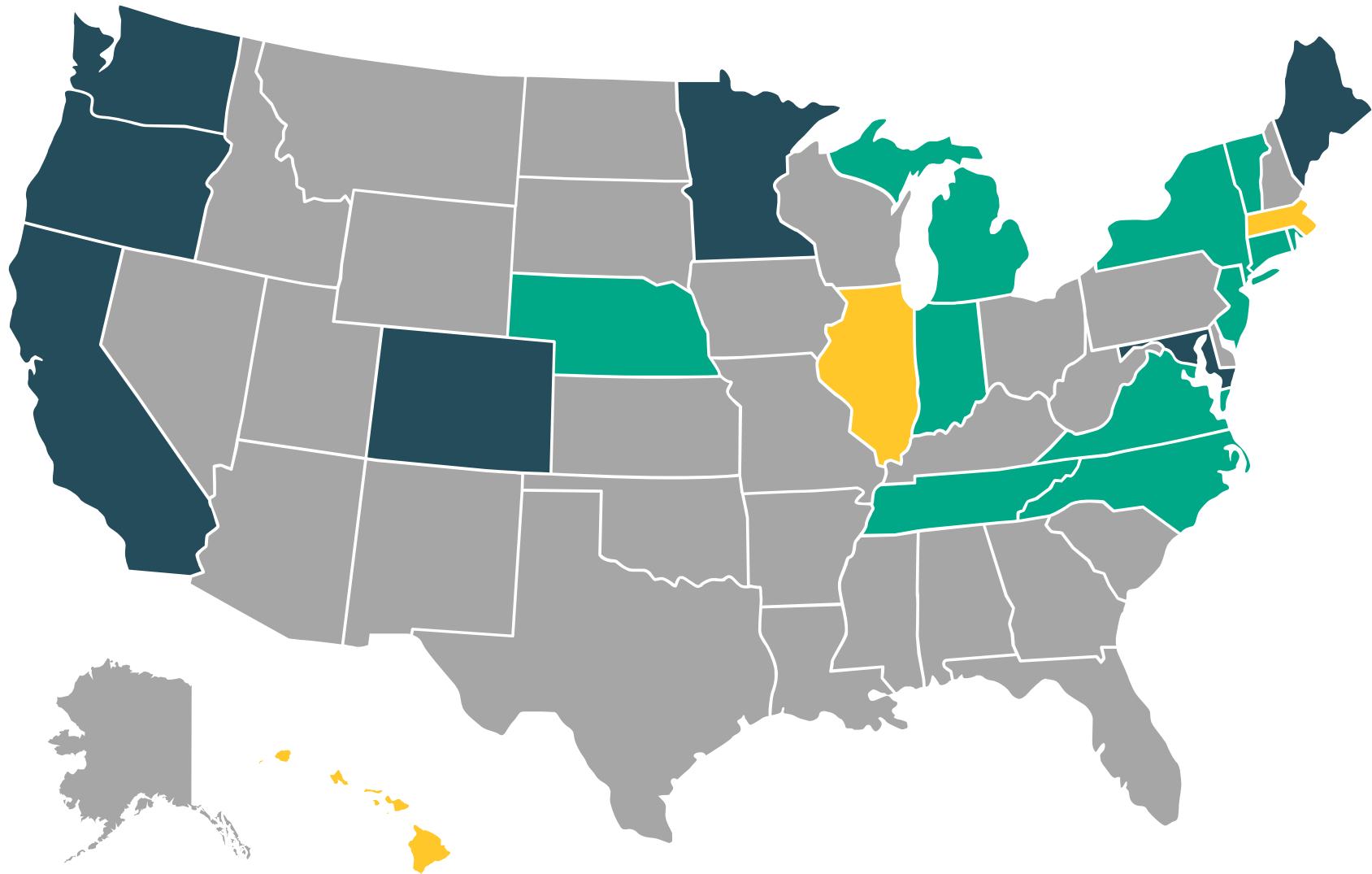
*Includes material captured through state deposit return systems

* This figure does not include film

EPR for Packaging 2026 Map



-  EPR for packaging passed
-  EPR for packaging legislation expected or being discussed in 2026
-  EPR for packaging needs assessment or study bill passed

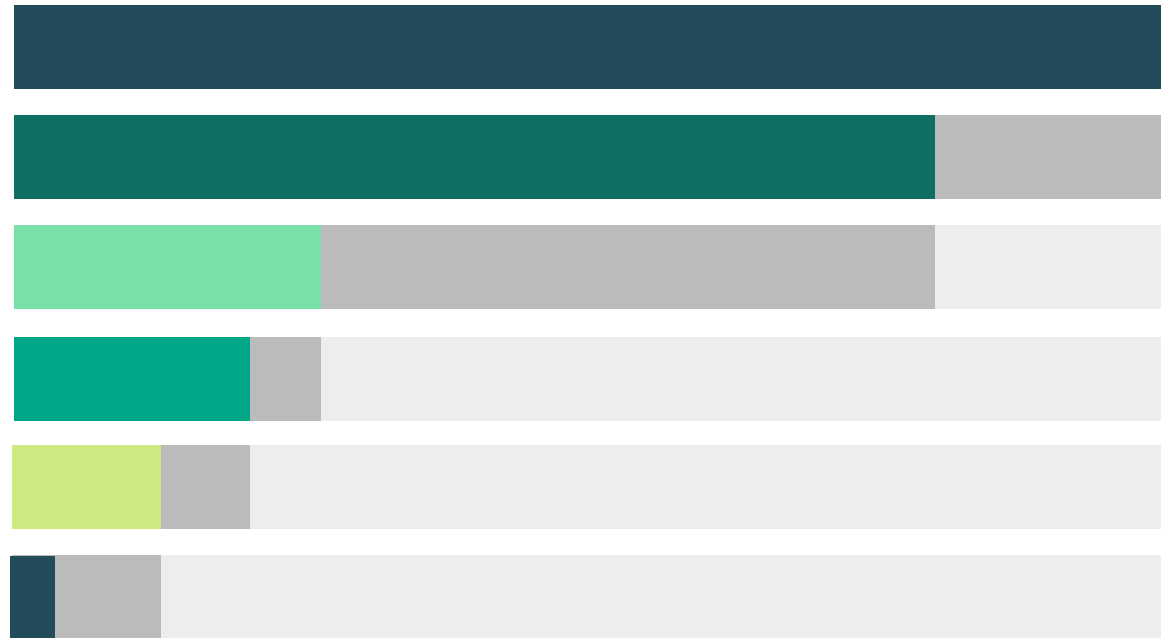


Recycling Rates Plummet at the Household Level

Ex: 100% PET Thermoforms Sold to CA Households

+80% **access** to recycle non-bottle PET and thermoforms in CA but **collection** rate is less than 45%

88% Access Rate
43% Collection Rate
62% MRF Capture Rate
63% Reprocessing Capture Rate
4% Recycling Rate*



single-use plastic packaging and food service ware sold in California must be recycled



30% Recycling Rate by 2028

65% Recycling Rate by 2032



Thanks to our Materials Recycling Coalitions Members



Accelerate recycling rates and regulatory compliance for **Film & Flexibles, Polypropylene, and PET Packaging**



STIMULATE DEMAND

- Macro-factors leadership
- Innovative matchmaking
- Demonstrating successes through partnerships
- Demand Champions aid



CATALYZE SUPPLY

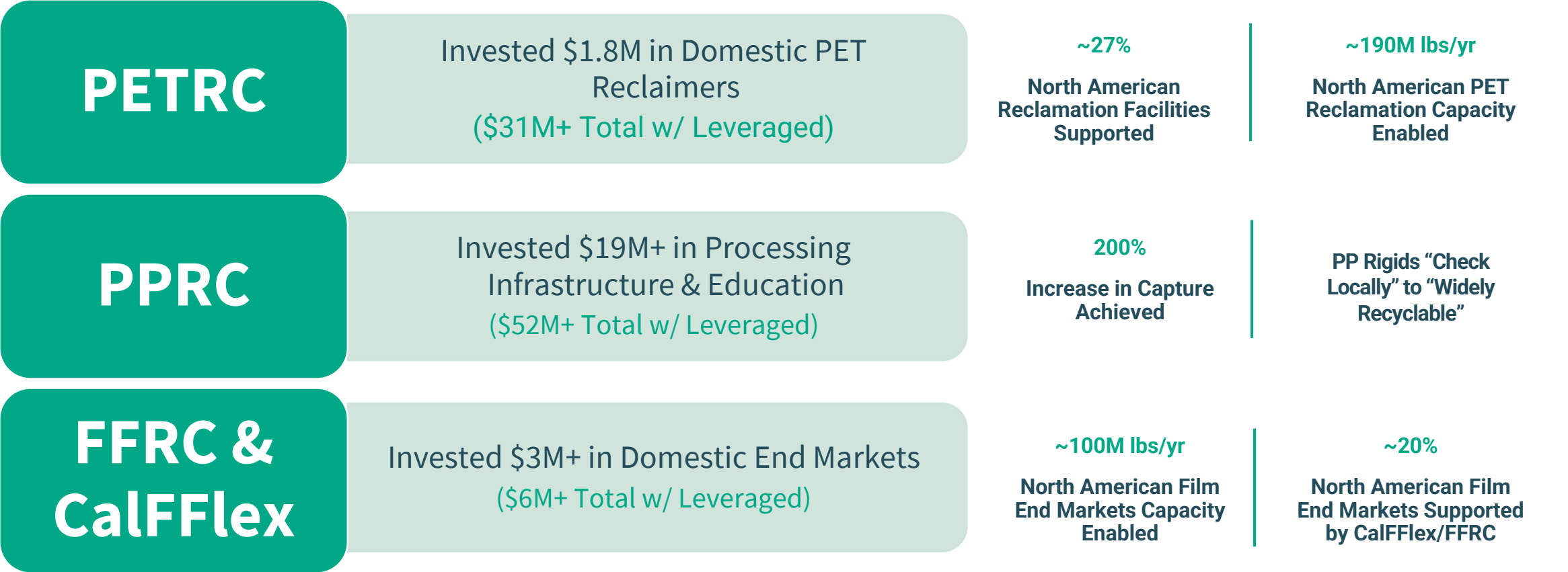
- Identify material specific barriers to recycling
- Pilot behavior change tactics
- Translate for scale



ENABLE COMPLIANCE

- Adapt strategies for policy implementation & lean into SB 54 compliance pathways
- Regulator/PRO support
- Stakeholder navigation

Millions Invested in PP, PET, F&F Markets since 2020 through Coalitions Model





CalFFlex

An Initiative of The Film
& Flexibles Recycling Coalition

Accelerating Residential Film & Flexibles Solutions in California

Building end market momentum through active investments, test loads, and pipeline development.

1 California Supply Projects

High-quality film & flexibles supply from leading facilities.



Project 1
Top 5 MRF



Project 2
Top 5 MRF



Project 3
Top 2 SSF

Generating consistent, scalable feedstock across California.



2 Active End Market Grants

Pre-investing and supporting existing, scalable near-term infrastructure & market development.

End Market 1 | CA

End Market 5 | IN

End Market 2 | CA

End Market 6 | PA

End Market 3 | BC

End Market 7 | PA

End Market 4 | NE

End Market 8 | AR



Test Load Innovation Program
Scouting and shipping innovation test loads to 3-5 new end markets every quarter.



3 Pipeline in Due Diligence

Expanding the pipeline of future end market opportunities.

End Market 9 | CA

End Market 10 | MX

End Market 11 | NE

End Market 12 | PA



CalFFlex is actively building a scalable residential film & flexibles end market network across North America.

Delivering pre-investment, regulator understanding, and PRO support backed by data, key learnings, and real-time supply chain success stories on the ground in California.



The Recycling
Partnership

Our progress is expedited and aligned with:



Case Study: Pre-Investing in Regional Supply Chain for Recycled Polypropylene in California

+50% INCREASE IN POLYPROPYLENE CAPTURE



Infrastructure

Optical sorter upgrade improves PP recovery and bale quality.



Education

Targeted outreach drives participation and recovery.



End Markets

Regional investments enable supply chain options.



PORTLAND, OR
Denton Plastics

SAN JOSE, CA
GreenWaste



LONG BEACH, CA
Talco Plastics

Five Requirements of an Effective Recycling System



All state EPR laws that have been passed require substantial public education and outreach.

- 1 All packaging needs to be designed for recyclability.
- 2 All households need access to recycling in their home.
- 3 Residents need to fully engage in recycling.**
- 4 Recycling facilities need to effectively process the material.
- 5 Recycling facilities need sufficient end markets.

Leverage social and behavioral science to deliver innovative, human-centered solutions.



Introducing

The Recycling Participation Fund

A strategic investment to drive resident participation & material capture, strengthen confidence, and increase recycling rates.



People.

At the center.



Action.

Measurable
impact.



Impact.

Stronger system,
brighter future.



**The Recycling
Partnership**



The Recycling Participation Fund

is supported by



The Recycling Participation Fund

Innovate, prove, and share 5 new recycling behavior change tactics to increase recycling rates

Translate & transform

Transform consumer insights into strategies & tactics for on-the-ground deployment



Into real world action

Deploy community interventions to prove strategies, test tactics, deliver system improvements

5 Easy Ways to Request Your Free Recycling Toter
(choose one)

Call: 765-876-0025

Visit us: muncisanitary.org/departments/recycling

Return the attached card. No stamp needed!

Email: recycle@msdeng.com

Scan:

Sign up today and look for your recycling toter arriving in 2-4 weeks!

Join your neighbors and request your free Recycling Toter today!

Recycle your boxes, bottles and cans.

Capture data & stories

Package data, insights, and storytelling to accelerate best practice adoption

IMPACT IN PROGRESS
CASE STUDY

Successful recycling programs start with access. But they don't succeed on access alone.

In August 2020, the town of Sahuarita, Arizona, transitioned from a subscription-based recycling model, where residents had to opt in to recycle, to a universal curbside program. Which means that now, every household has a 16-gallon can for recycling and can participate in the town's recycling program.

With support from The Recycling Partnership (The Partnership), Sahuarita is launching a robust education and outreach campaign designed to drive delivery. Backed by a grant that awards \$1.50 per household more than double the national average.

What We're Testing

Sahuarita is the latest project in The Partnership's outreach effort to identify what truly drives behavior change. This project is testing a key question: Can greater investment in outreach lead to stronger participation and cleaner recycling from day one? The outreach strategy draws from more than a decade of applied research led by The Partnership and this campaign is built to inform, engage, and empower residents before and during the launch of the new curbside service.

Why It Matters

Every year, millions of recyclable materials end up in landfills, not only because of a lack of infrastructure, but also because of confusion and low participation. The Partnership's *State of Recycling Report* shows that 41% of households with access to recycling do not participate. The project is an opportunity to better understand:

- How early, high-touch outreach affects participation and material quality.
- What outreach works best for riskiest communities.
- How future programs can scale smarter, community-centered outreach.

Thank You to Our Partners

The Recycling Partnership

Proving What Works: When Education Leads, Does Behavior Follow?

Sahuarita, Arizona

Scale knowledge

Scale distribution of knowledge via workshops, webinars, & community engagement hub



Learn more about The Recycling Participation Fund

recyclingpartnership.org/recycling-participation-fund/



The Recycling Participation Fund

Scaled Action to Increase Recycling Rates Across the U.S.

An investment model that helps communities increase recycling participation and accelerate progress toward recycling rate goals.

Become A Partner



Get in Touch:

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🌐 recyclingpartnership.org



**The Recycling
Partnership**

Building a Better Recycling System

We're a purpose-driven organization committed to building a better recycling system that delivers economic and environmental benefits for communities and the industry.