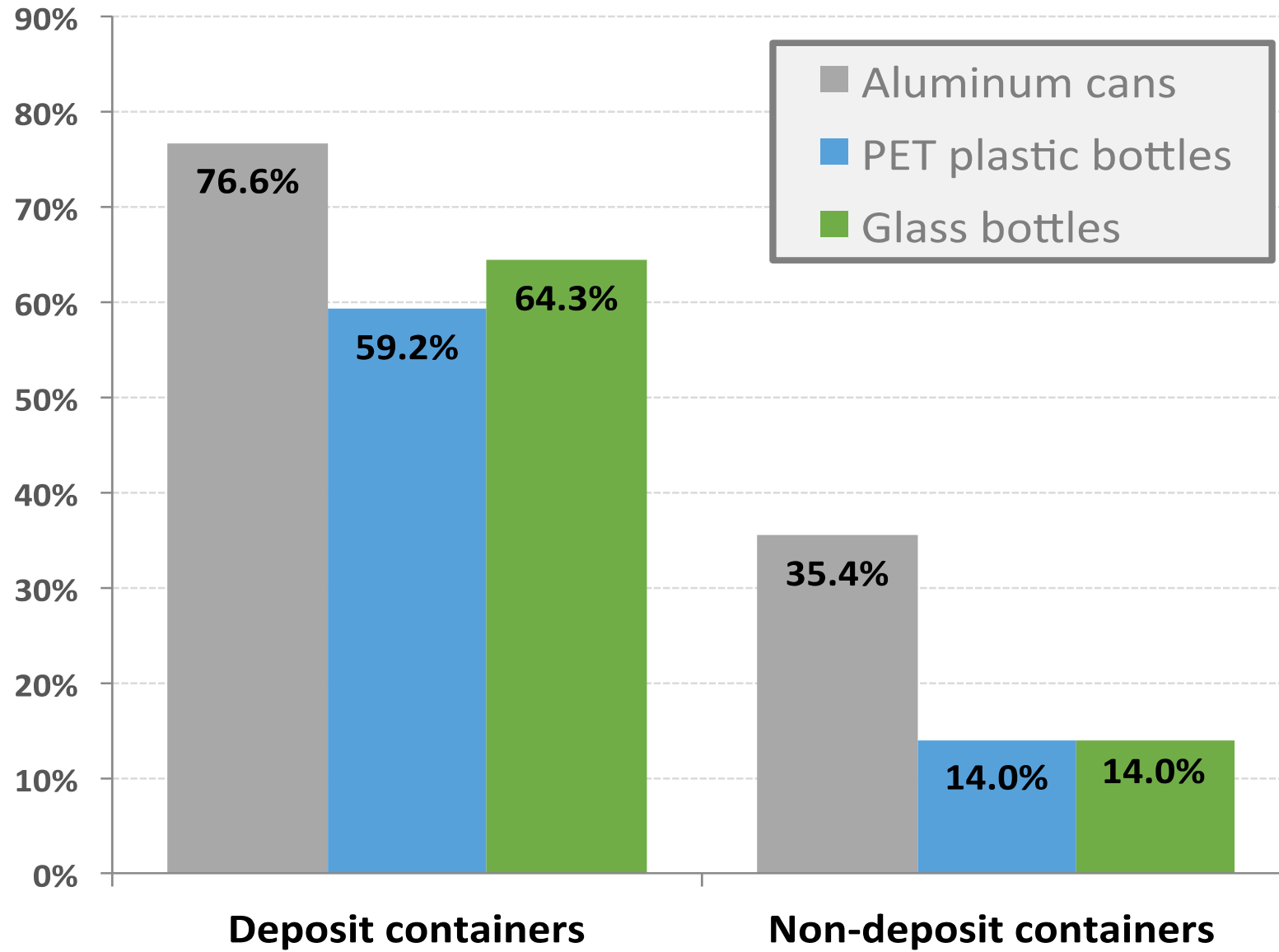


# **COVID-19 Impacts to California's Recycling Markets**

**Susan V. Collins, President  
Container Recycling Institute  
November 18, 2020**



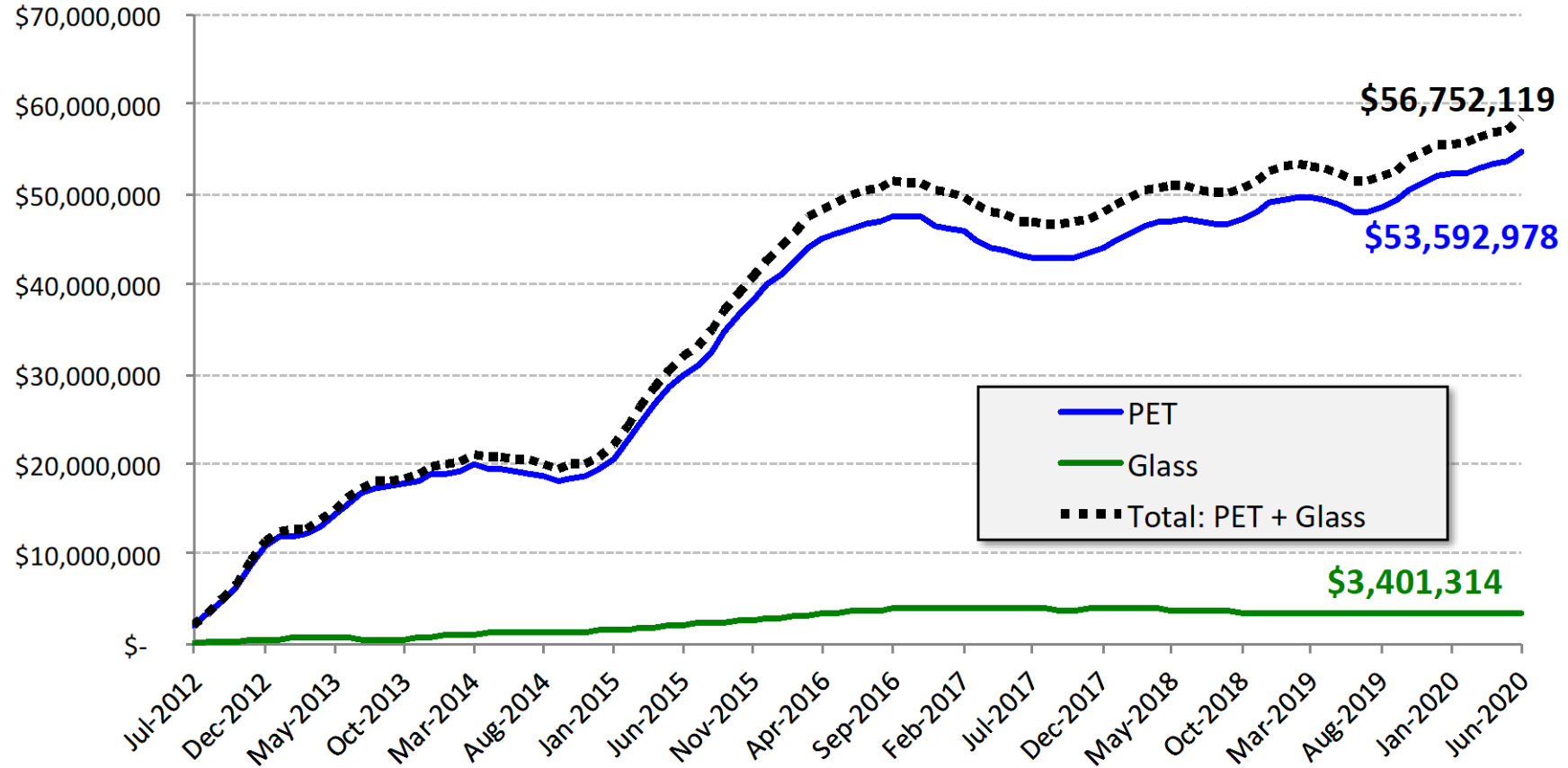
# U.S. Recycling Rates by Deposit Status, 2017



Source: "2017 Beverage Market Data Analysis," Container Recycling Institute, 2019. *This graph is copyrighted, and is not to be shared, copied, or reproduced in any manner without written permission from CRI.*

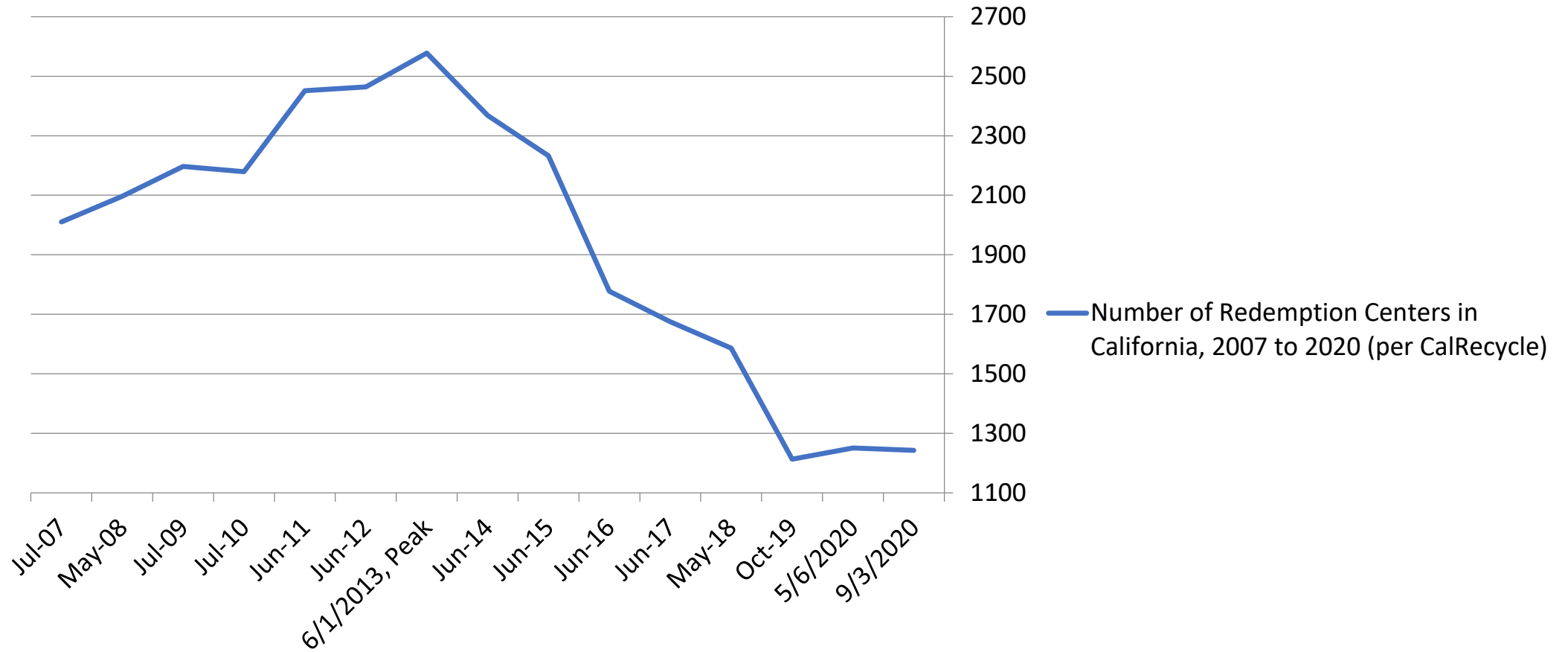
© Container Recycling Institute, 2020.

# Cumulative Shortfalls, July 2012-June 2020



Notes: Shortfalls are additive from Jul. '12 - June '20. Monthly per ton shortfalls were multiplied by monthly tons recycled by recycling centers. Per ton shortfalls are the difference between fixed-period scrap values CalRecycle uses to calculate processing payments, and actual scrap values during the months the recycling took place. Monthly tonnages were derived by dividing CalRecycle's reported units recycled by 12, and by multiplying by containers per pound and by recycling centers' "participant share" (reported annually). Source: CalRecycle, 2012-2020.

# California Loses 52% of Redemption Centers from 2013 to 2020; 1,335 Fewer Centers than in 2013

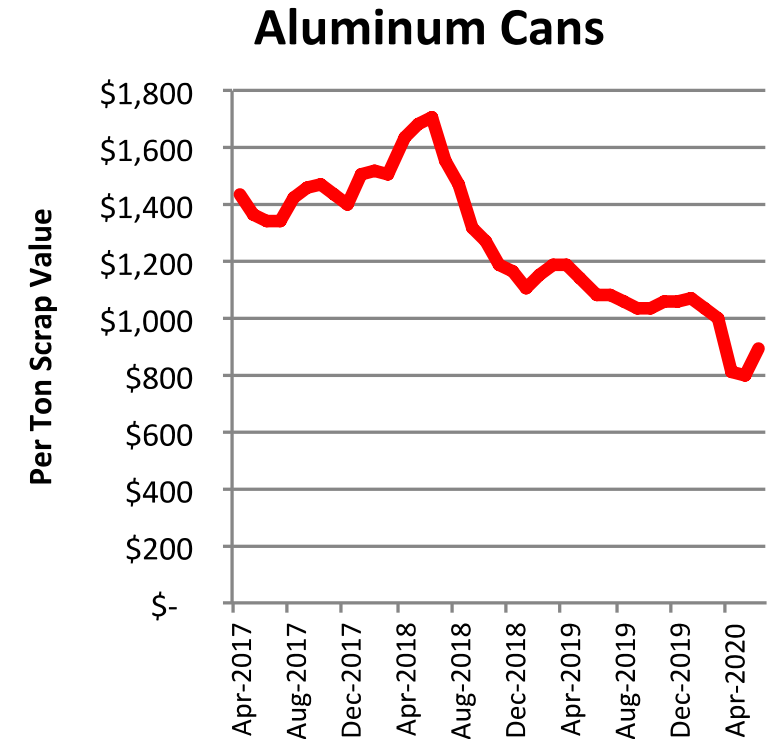
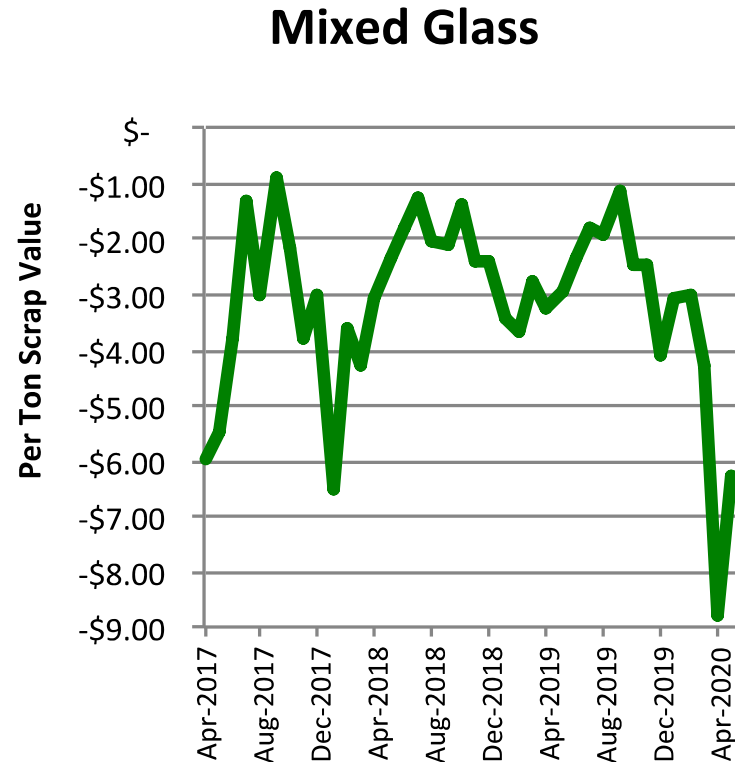
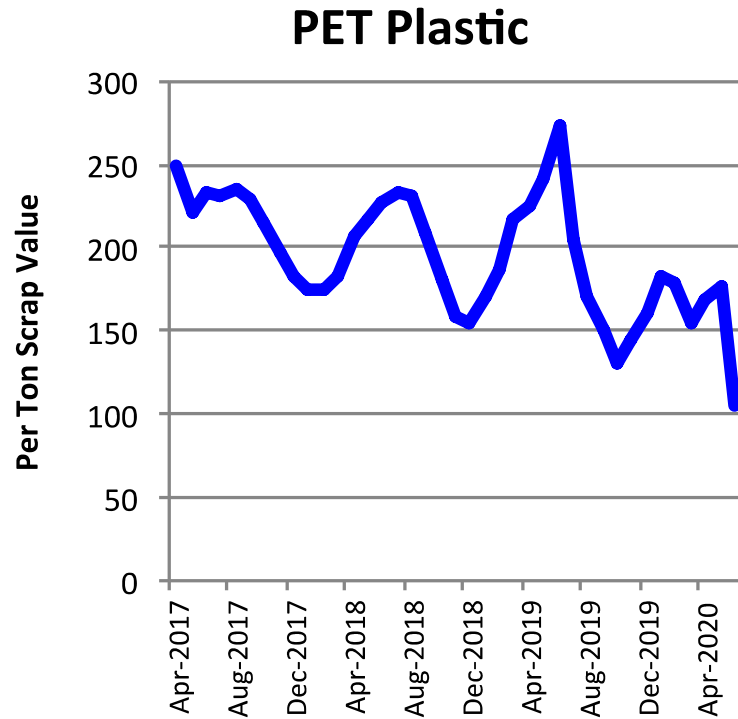


## Beverage Containers Returned - Selected Counties (CY 2019)

<b>Counties</b>	<b>Containers Returned Total, per Capita (Redemption + Recycling)</b>	<b>Redemption Center Containers per Capita</b>	<b>Curbside and Dropoff Containers per Capita</b>
<b>Selected Southern and Central California - Kern, Los Angeles, Tulare</b>	<b>580</b>	<b>552</b>	<b>28</b>
<b>Selected Northern California Counties - Alameda, Contra Costa, San Francisco, San Mateo, Santa Clara</b>	<b>321</b>	<b>230</b>	<b>90</b>
<b>Difference</b>	<b>259</b>	<b>322</b>	<b>-62</b>

# Scrap Values Trending Down Since 2012: All Three Major Container Materials

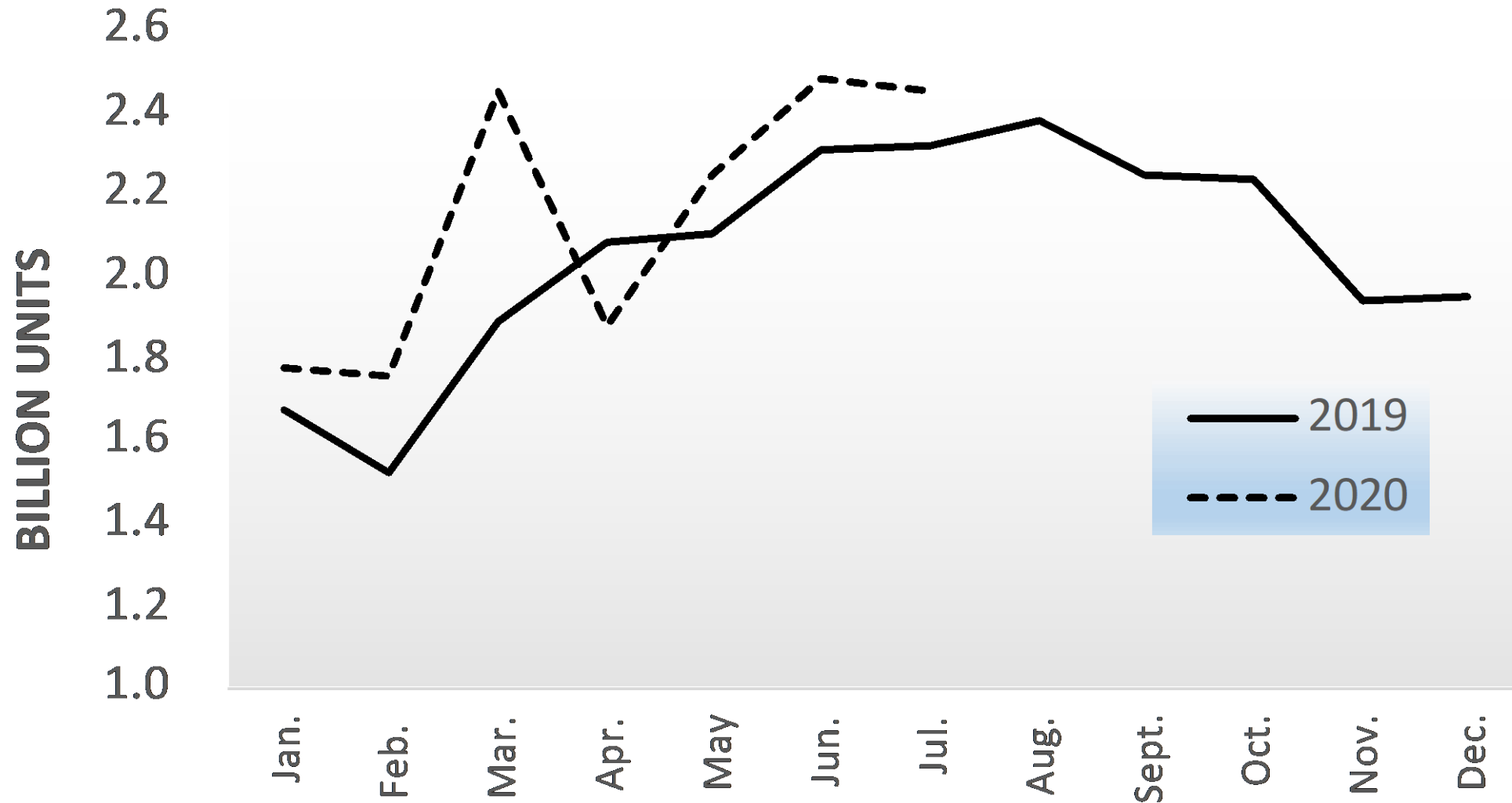
Statewide Average Monthly Scrap Values Reported by CalRecycle, July 2017 – June 2020



Source: CalRecycle, 2017-2020.

<b>U.S. Deposit tons recycled vs. total beverage tons recycled, 2017</b>					
	Aluminum Cans	PET Bottles	HDPE Bottles	Glass Bottles	<b>Subtotal, bottles &amp; cans</b>
All beverage sales	1,467,300	2,876,859	764,727	12,213,967	17,322,853
<b>Deposit beverage sales</b>	<b>344,074</b>	<b>651,135</b>	<b>53,539</b>	<b>2,031,922</b>	<b>3,080,670</b>
All beverage recycling tons	653,760	702,333	238,905	2,739,812	4,334,810
All beverage recycling rate	44.6%	24.4%	31.2%	22.4%	25.0%
<b>Tons redeemed</b>	<b>263,084</b>	<b>389,799</b>	<b>19,357</b>	<b>1,306,969</b>	<b>1,979,209</b>
<b>Redemption rate</b>	<b>76.5%</b>	<b>59.9%</b>	<b>36.2%</b>	<b>64.3%</b>	<b>64.2%</b>
<b>Tons redeemed as a proportion of all beverage recycling tons</b>	<b>40.2%</b>	<b>55.5%</b>	<b>8.1%</b>	<b>47.7%</b>	<b>45.7%</b>
<i>Source: data derived from "2017 Beverage Market Data Analysis," The Container Recycling Institute, 2020.</i>					
© Container Recycling Institute, 2020					

# California Packaged Beverage (CRV) Sales, 2019 vs. 2020

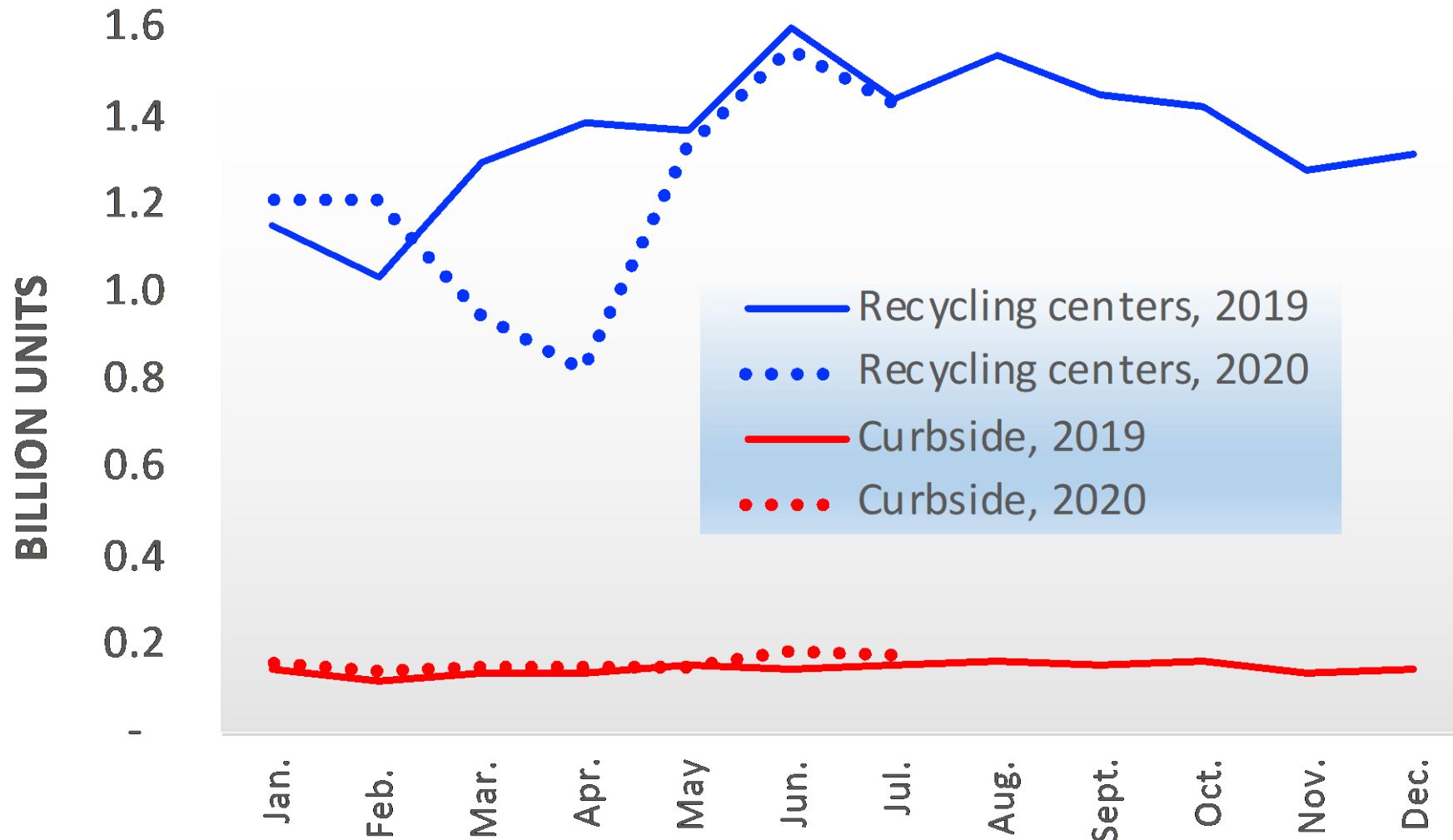


Source: CalRecycle.

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# California CRV Returns (Redemption + C/S recycling), 2019 vs. 2020



Source: CalRecycle.