

**NAPCOR:**

## **US lacks recycled PET to meet consumer brands' pledges**

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America simply does not have enough recycled PET supply or processing capacity to satisfy commitments being made by brand owners to increase recaptured resin content in their bottles, new data shows.

As program director for the National Association for PET Container Resources, or NAPCOR, Alasdair Carmichael has been looking at the issue for the past year or so.

With a PET recycling rate of a little less than 30 percent in the United States, and much of that material being used for nonbottle applications, NAPCOR said the numbers just don't add up.

Brand owners, under increasing pressure regarding single-use plastic packaging, are making more and more commitments to use recycled PET for a percentage of their plastic packaging needs.

"We've got a problem and we're not going to be able to meet those commitments easily," Carmichael said.

Just about half of all recycled PET capacity, 48 percent, is dedicated to non-bottle applications such as carpet fiber, strapping and textiles, NAPCOR reports.

Another 46 percent is dedicated to bottle production, and the remaining 6 percent is operated by what NAPCOR calls market sellers — processors that provide material for any use.

Even if all remaining 52 percent all goes to bottles, that still will not be enough.

"We're trying to make the point if we stay as we are, those commitments are not really going to be achievable," Carmichael said. "Given the status quo, we can't get there."

Companies have, for years, been making recycled PET content commitments. But the pace of those promises recently has increased significantly, NAPCOR said.

A flurry of commitments came out earlier this year at the World Economic Forum in Davos, Switzerland, and have continued since. It soon became clear to NAPCOR that market conditions and existing infrastructure will not be adequate to meet the brand owner commitments.

"I don't know if anyone has quite said it like that before," NAPCOR Communications Director Laura Stewart said. NAPCOR decided to tackle the issue as a way to start educating brand owners about the challenges they face in making recycled-content promises in today's market.

"I feel that some decisions need to be made based on fact. But some of it is education. NAPCOR has always been known as a data-driven organization. We take pride in that. I think this information needs to be shared," Stewart said.

Current collection volumes could support a 10 percent, across-the-board commitment, but anything beyond that is problematic at this point, the trade group said.

"People don't realize how far away we are currently in being able to achieve the levels that are potentially talked about," Carmichael said.

Carmichael said NAPCOR is uniquely positioned to examine the recycled PET market because of its sole focus on that resin. Members of the trade group are located throughout the business, from resin makers to processors to recyclers.

Brand owners often have looked at financial considerations when deciding whether to use recycled resin, which is typically more expensive than virgin resin. As public pressure mounts on plastics, more and more companies are willing to no longer fret as much about price difference. y will now have to contend with a supply issue, NAPCOR believes. Europe, with its much higher PET recycling rate of 58 percent, is better positioned to meet commitments being made by brand owners, Carmichael said.

But the United States, as people on both sides of the Atlantic are quick to point out, is not Europe.

"If we stay as we are, these commitments are not really going to be achievable. Something has to change on the collection end, not just at the production end," Carmichael said.

NAPCOR's message is not new. Longtime plastics recycling expert David Cornell made the same point in a November podcast hosted by NAPCOR member Amcor Rigid Packaging USA LLC.

Cornell, a member of the Plastics Hall of Fame and the former technical director for the Association of Plastic Recyclers, estimated that to meet future demand, the U.S. recycling rate for PET containers will need to jump to at least 70 percent. He said that would require a "change in theology" around recycling and deposit laws.

Cornell pointed out that growing demand would overwhelm recyclers and lead to pressure for national deposit laws..

Ten states currently have bottle deposit programs, which typically have recycling rates of between 65 and 95 percent..