

Washington Recycling Reform Act Advisory Council

MEETING #7

October 8, 2026

10:00-2:00pm PT

WM SMaRT Center

Meeting Agenda

- I. Welcome
 - a. Review agenda
 - b. Call for disclosure of conflicts of interest related to today's meeting agenda
- II. PRO Update – Julie Gilbertson & Geoffrey Inch, CAA
 - a. Q&A/Discussion
- III. Needs Assessment draft discussion
- IV. Lunch/Break
- V. Continue Needs Assessment draft discussion
- VI. Subcommittee Updates
- VII. Public Comment
- VIII. Preview of Next Meeting Content
- IX. Adjourn

RRA Advisory Council Purpose & Objectives

Purpose

The purpose of the Recycling Reform Act Advisory Council (council) and its subcommittees is to advise the Washington State Department of Ecology (Ecology) and the Producer Responsibility Organization (PRO) on implementation of the Recycling Reform Act (RRA). The council offers diverse perspectives and practical insights to help inform policy decisions related to recycling system design, performance, and equity.

Objectives

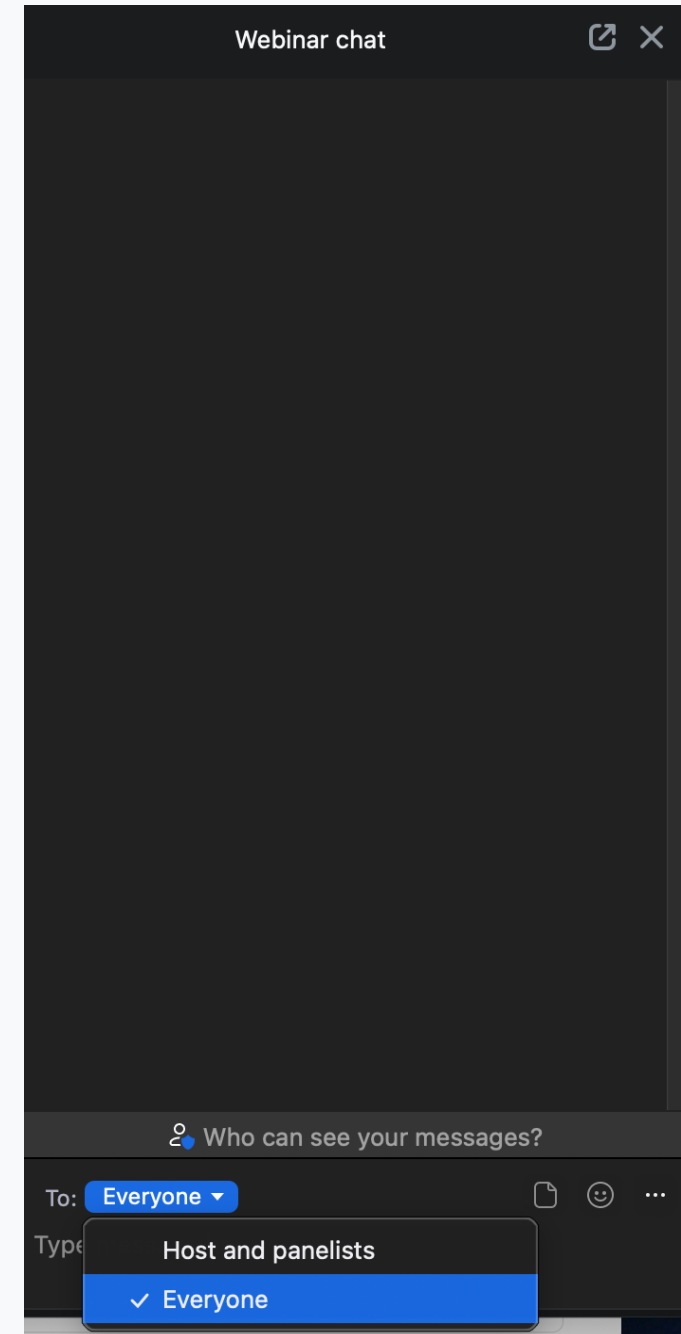
The objective of the council is to give advice and recommendations to Ecology and the PRO to support effective implementation of the RRA, including:

- a. Identifying system gaps, needs, and implementation challenges
- b. Elevating equity and environmental justice considerations
- c. Ensuring representation of diverse perspectives across Washington's recycling system
- d. Balancing the needs and interests of the groups each council member represents with the best interest of the program overall

Council input is intended to help Ecology and the PRO carry out the law effectively, equitably, and in alignment with legislative intent.

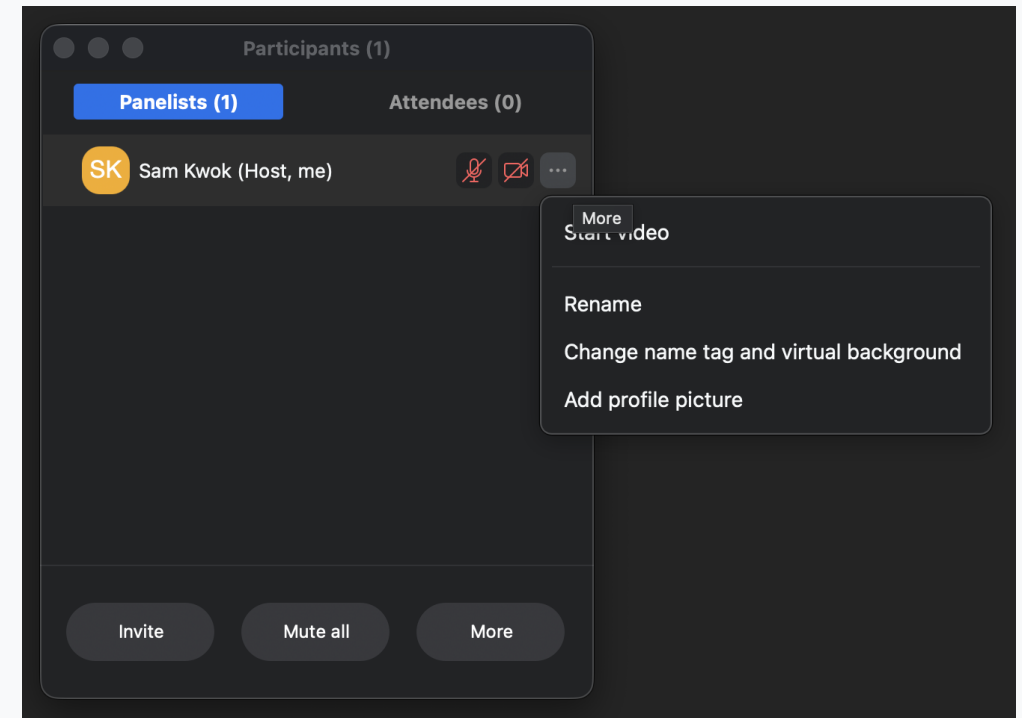
Housekeeping

- All public participants are observers and in listen-only mode. Microphones are muted. The chat is not available for public attendees to use, but they may still see the chat. **Public attendees should use Q&A function for any public comment.** The Q&A button can be opened at the bottom of your toolbar.
- Council members will be able to raise hands and come off mute to communicate. **If using chat, please make sure all messages are sent to "Everyone" (see right).**
 - All panelists should open the chat box now and ensure that "To" is to "Everyone" above the box to type.
- If council members experience any A/V issues throughout the webinar, Deion Collins is available for technical support.



Housekeeping

- Live captioning is enabled for meetings. Participants have the option to toggle it on and off at the bottom of their toolbar.
- Council members should rename themselves to include: **name, organization, seat represented** (e.g., Rick Vahl, Waste Connections, Solid Waste).



Open Public Meetings Act

RCW 42.56: Public records act

RCW 42.30: Open public meetings act

- RRA advisory council must comply with OPMA (RCW 70A.208.050(8)(b))
- Meetings are open to the public for all deliberations and discussions
- Post agenda, meeting schedule, and minutes (notes)
- Actions and votes must be public
- All conversations and comments in the virtual chat must be viewable by all attendees and must be directed to "Everyone"
- Official business may only be conducted in meetings open to the public (e.g., no council or subcommittee discussions via email)
- Any documents shared for committee comments/edits must also be available and accessible to the public

Public Comment Process

- How to sign up
 - Online: Use the Q&A box to indicate your interest and topic.
 - By phone: Press *9 to raise your hand.
 - In person: Add your name to the public comment sign-up sheet.
 - Speakers will be called in the order requests are received.
- Comment requirements
 - Comments must relate to the meeting agenda.
 - Each speaker has up to 2 minutes.
 - A timer will sound when time is up, and the speaker will be muted.
- Comment or questions
 - The public may provide comment or ask a question when making a public comment.
 - Questions may be answered within the 2-minute period when a response is readily available.
 - Questions that cannot be answered immediately will be captured in the meeting notes, with best efforts made to respond in the notes or at a future meeting.
 - If time remains during the 10-minute public comment period, the facilitator may invite additional speakers or allow time to address unanswered questions.
- Meeting conduct
 - Speakers may lose their remaining time or future commenting privileges if comments are off topic or disrupt the orderly conduct of the meeting, including hate speech, political campaigning or promotional content.
- Written comments may be submitted to rraadvisorycouncil@cplusc.com.

RRA Advisory Council Members

Member	Affiliation	Category Represented
Megan Daum	American Beverage Association	Producers/manufacturer trade association
Danielle Waterfield	AMERIPEN	Producers/manufacturer trade association
Casey Bouchard <i>Delegate: Aspen Kvicala</i>	Methow Recycles	Recycling facility
Jeff Zillich	WM	Recycling facility
Rick Vahl	Waste Connections	Solid waste collection/hauling
Amanda Dalton	Northwest Grocery Retail Association	Retailers of covered materials
Moji Igun	Zero Waste Washington	Statewide environmental organization
Ming-Ming Tung-Edelman	CareMakers Collective	CBO/environmental justice organization
Alissa Campbell	Recology	MRF
Jay Blazey	Cedar Grove	Compost facility/composting interests
Trace Bradburn	City of Spokane	Local government
McKenna Morrigan	Seattle Public Utilities	Local government
Becci Piepel	Douglas County Solid Waste	Local government
Grant Williams	Tribal Solid Waste Advisory Network	Tribal solid waste interests
Jocelyn Quarrell	Bold Reuse	Reuse / refill systems
Karen Hultgren	Pierce County	Other interested parties
Michael Liptack <i>Delegate: Pete Moe</i>	Friday Harbor Orcas Recycling Services/ The Exchange	Other interested parties
Peter Lyon	WA State Department of Ecology	Ecology representative (non-voting)
Julie Gilbertson	CAA	PRO representative (non-voting)

Conflicts of Interest

- Members must disclose any actual, potential, or perceived conflict of interest as soon as it arises and before participating in discussion of the relevant topic. Disclosures will be made verbally at the onset of meetings and/or in writing to the facilitation team prior to meetings.
- In most cases, disclosure alone is sufficient, and a council member can still participate in discussion after the disclosure is made.
- In the case of a conflict-of-interest disclosure where the member or their organization stands to receive a direct financial or regulatory benefit from a specific recommendation, the member will self-identify the conflict of interest and recuse themselves from participating in the discussion and from any vote related to that agenda item.
- In general, members should self-identify conflicts of interest and recuse themselves from discussion when appropriate. However, the council chair can also determine that a member has a conflict of interest and ask them to officially disclose the conflict, and if needed, recuse themselves from discussion. The vice chair may step into this role if the chair is the person with a conflict and they opt not to self-disclose or recuse themselves from discussion.

PRO UPDATE

- JULIE GILBERTSON & GEOFF INCH, CAA



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CAA Washington Updates

Recycling Reform Act Advisory Council Meeting
October 8, 2026

Agenda

1. Intro
2. Producer Updates
3. Needs Assessment & Program Planning
4. Closing

WA Producer Updates

Washington's 2027 Early Fee schedule now available to support producer planning

May 31, 2026: Interim producer reporting deadline

Calendar year 2025 supply data reported by producers informs the calculation of Washington's 2027 Early Fees.

October 1, 2026: Early Fee schedule published

Washington Early Fee rates are available through CAA's website and Producer Portal, giving producers time to incorporate the expected payment into 2027 budgeting and financial planning.

October 21, 2026 (planned): Participant-producer webinar on 2027 EPR fee planning

CAA will review the Early Fee schedule, explain how producers can use it for 2027 planning, provide detailed preparation instructions and address producer questions.

Q1 2027 (planned): Invoicing

CAA plans to issue Washington Early Fee invoices in Q1 2027. Invoice instructions and applicable payment terms will accompany producer communications.

Washington Early Fees use producer-reported supply and simplified material classes

- **Source data:** Early Fees are calculated using producer-reported Washington supply data.
- **Material classes:** Supply is grouped into simplified material classes because final Washington program material categories have not yet been defined.
- **What Early Fees fund:** The Early Fee budget funds essential infrastructure, systems and services, program-plan development, and applicable regulator expenses.

Washington participation has grown 17% since the June Advisory Council update

- 3,132 Washington participant producers in October 2026
- +457 participant producers since June
- +17% growth since June

CAA leverages national scale while maintaining a targeted Washington focus

Identify

Bring prospective Washington producers into the process

Continue Washington-specific inbound marketing campaigns through Q4 2026

Conduct company and contact research

Incorporate Washington interested party referrals and available company lists

Engage

Move known organizations toward registration

Conduct direct outreach to identified organizations and contacts

Review existing CAA participants for potential Washington applicability

Provide registration education and onboarding support

Monitor

Track participation and remaining gaps

Monitor registration status and incomplete participation steps

Prioritize follow-up with identified organizations

Use observed gaps to refine research, campaigns and outreach

Refer

Route unresolved obligation questions appropriately

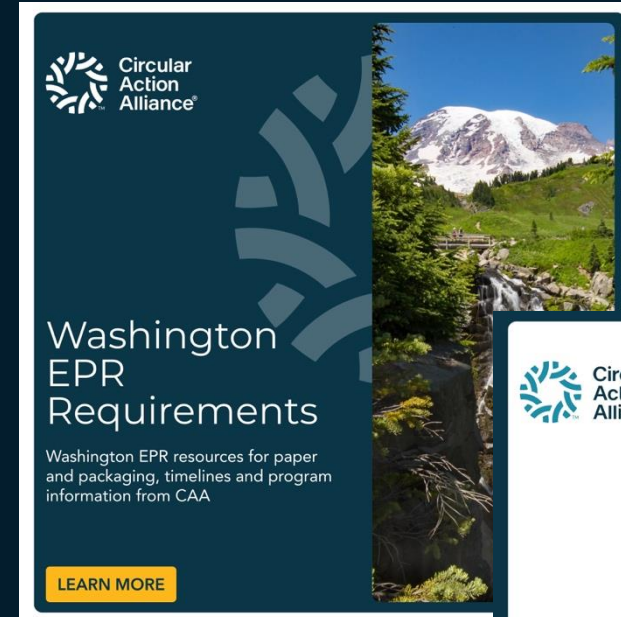
Consolidate available information when questions remain unresolved

Refer relevant information through the appropriate regulatory pathway

The regulator determines non-compliance and enforcement

Washington-specific campaigns expand awareness and bring prospective producers into the registration process

- Washington-specific creative and calls to action build awareness among prospective producers.
- Campaign materials connect companies with CAA registration information and producer support.
- The campaign expands the top of the funnel; CAA's direct outreach and onboarding capabilities support identified organizations through registration.



Washington producers receive state-specific resources through CAA's established support platform



**Covered Material and Producer Definitions:
Washington**

**Covered Materials and Producer Definitions:
Washington**

Published: November 2025

The information provided in this publication is designed to help businesses identify the materials that are captured in Extended Producer Responsibility (EPR) laws and the responsible producer for those materials. Circular Action Alliance (CAA) is providing the following detailed information for Washington.



Washington producers can access program-specific schedules and resources through CAA's Producer Portal, including the 2027 Early Fee schedule and supporting information.

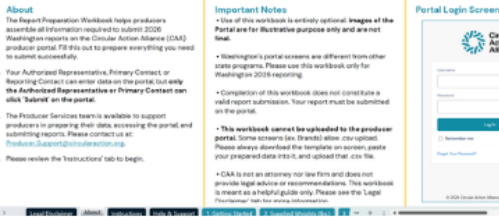


Producer Report Preparation Workbook
Washington 2026 Reporting (2025 Data Year) - V1.0

Washington 2026 Report Preparation Workbook

Published: March 2026

This document is an offline, Excel-based Report Preparation Workbook that mirrors the Washington Producer Portal screens and helps producers gather the information required for reporting supply data in the Portal. This workbook reflects the simplified material reporting categories in which Washington producers will report in 2026 and will support producers in getting ready to report before and during logging into the Portal.



Across programs, CAA has published more than 50 guidance and knowledge documents and managed more than 60,000 producer-support cases since 2025.

Next actions focus on producer readiness and remaining participation gaps

- Continue Washington-specific marketing campaigns through Q4 and direct outreach to identified organizations
- Accept and process prospective-producer referrals for follow-up
- Support participant producers through the October 21 Early Fee webinar
- Follow up on incomplete registration and reporting steps
- Track remaining participation gaps and prioritize targeted outreach

Thank You!

WA Producer Updates Questions

Needs Assessment and Program Planning

Needs Assessment vs. Program Plan

Both play a key role in the move to EPR, but they answer different questions and are built at different points in the process.

Needs Assessments

Ecology-led | 2026–2027

What does Washington's system look like today, and what could it achieve?

- Point-in-time study based on the data available when it was written
- Describes the current landscape: infrastructure, service levels, markets, gaps
- Establishes a draft baseline for recycling and composting rates
- Models potential 5-year, scenario-based performance outcomes
- Recommends operational approaches for the PRO to consider
- Informs the scope of rulemaking and the statewide lists

Program Plan

CAA-led, Advisory Council-consulted, Ecology-approved | 2027–2028

How will the program actually operate, be funded and be measured?

- Validates the data, assumptions and recommendations in the Needs Assessment
- Adds supplemental analysis where the assessment stops short of what operations, the Statute or regulations might require
- Built through consultation with the Advisory Council, Equity Subcommittee, Ecology and interest holders
- Sets operational parameters, targets, reimbursement and investment strategy
- Tailored to the statute, the rules and what exists on the ground in Washington
- Reviewed publicly, revised and approved by the Ecology before implementation begins

The Process Builds on Itself

Each stage builds on the one before it, tests it against new information and improves the picture. There are controls at every point.

What carries forward

The baseline, the definitions and the questions yet to be answered. What is learned at each step corrects and extends the step before it rather than replacing it.

1

Needs Assessment

Baseline & landscape

Point-in-time snapshot from available data, with scenarios and recommended approaches

2026–2027

2

Validation & Supplemental Analysis

Test the numbers

Verify data sources and methods; fill gaps where operations need more detail

2027 – 2028

3

Consultation & Iteration

Ground-truth the system

Facility visits, deep dives, operator and interest holder feedback; learning from states already online

2026 – 2028

4

Draft Plan, Review & Approval

Test the plan

Advisory Council, Equity subcommittee and Ecology review, public comment, revision and approval

2027 – 2029

5

Implementation

Real data, real feedback

Producer and service provider reporting, audits and evaluation feed the next plan

2030+

Role of the Needs Assessment and Plan Development

The Ecology-led needs assessment provides an important and required input into plan development. While it should be as accurate and transparent as possible, additional analysis, consultation and operational planning will further refine the program plan.

Needs Assessment

- Definitions and scope aligned with statute (e.g., covered vs. non-covered materials, covered entities)
- Transparency on data source, methods and assumptions
- A credible and reproducible baseline
- Clear identification of gaps, limitations and uncertainties rather than modelled numbers
- Reasonable ranges where complete data is unavailable
- Underdeveloped areas identified for prioritization in plan development (e.g., end markets, current infrastructure, costs)

Plan Development

- Facility-level capacities, service details and measurement approaches
- Costs and compensation refined through consultation with service providers
- End markets, standards and certifications that change over time
- Changes that occur after the study, such as facility openings, closures or regulatory developments
- Additional materials, services or operational considerations identified during planning

What This Means for the Advisory Council

The needs assessment is an important input to program planning, not the final outcome.

1

Focus NA review on the foundations

Definitions, methodology, assumptions and data sources deserve the most scrutiny now. These form the foundation and will support better planning and decision-making as the program develops.

2

Keep bringing new information forward

The assessment is one input into the plan. Additional materials, facilities, practices or concerns can be introduced and validated during plan development in 2026–2027.

3

Expect the plan to build on the assessment

Validation, additional analysis and operational considerations will inform the plan. As new information is brought forward, the advisory council will have opportunities to provide input and shape the path forward.

Stay Engaged

Producers

- Register with CAA
- Producer questions? Email producer.support@circularaction.org

Support Ecology's Prelim. Assessment

- Comment on the draft by [Oct 30](#).

Provide CAA Your Input

- Support engagements through site visits, facility tours, conversations
- Sign up for CAA news, webinars and events on [our website](#).

Let's keep in touch.

Invite CAA Washington to
your community or facility.



Thank You



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NEEDS ASSESSMENT DRAFT

- Q/A & DISCUSSION

Washington Recycling Reform Act

Preliminary Needs Assessment

October 8, 2026



RRS



Agenda

Topic	Lead Firm	Time
Introduction of PNA	HDR	10:35am
Contracts and Costs	Bin There Consulting	10:45am
Material Quantities	Cascadia	11:15am
<i>Lunch Break</i>		<i>11:45am – 12:15pm</i>
Service Levels	HDR	12:15pm
Infrastructure and Capacity	HDR	12:45pm
End Markets	RRS	1:15pm

Preliminary Needs Assessment

What the Preliminary Needs Assessment examines



Material quantities

How much material is generated and managed



Collection service levels and access

Where collection is available and how service varies



Service contracts and costs

How services are structured and what they cost



Facilities and processing capacity

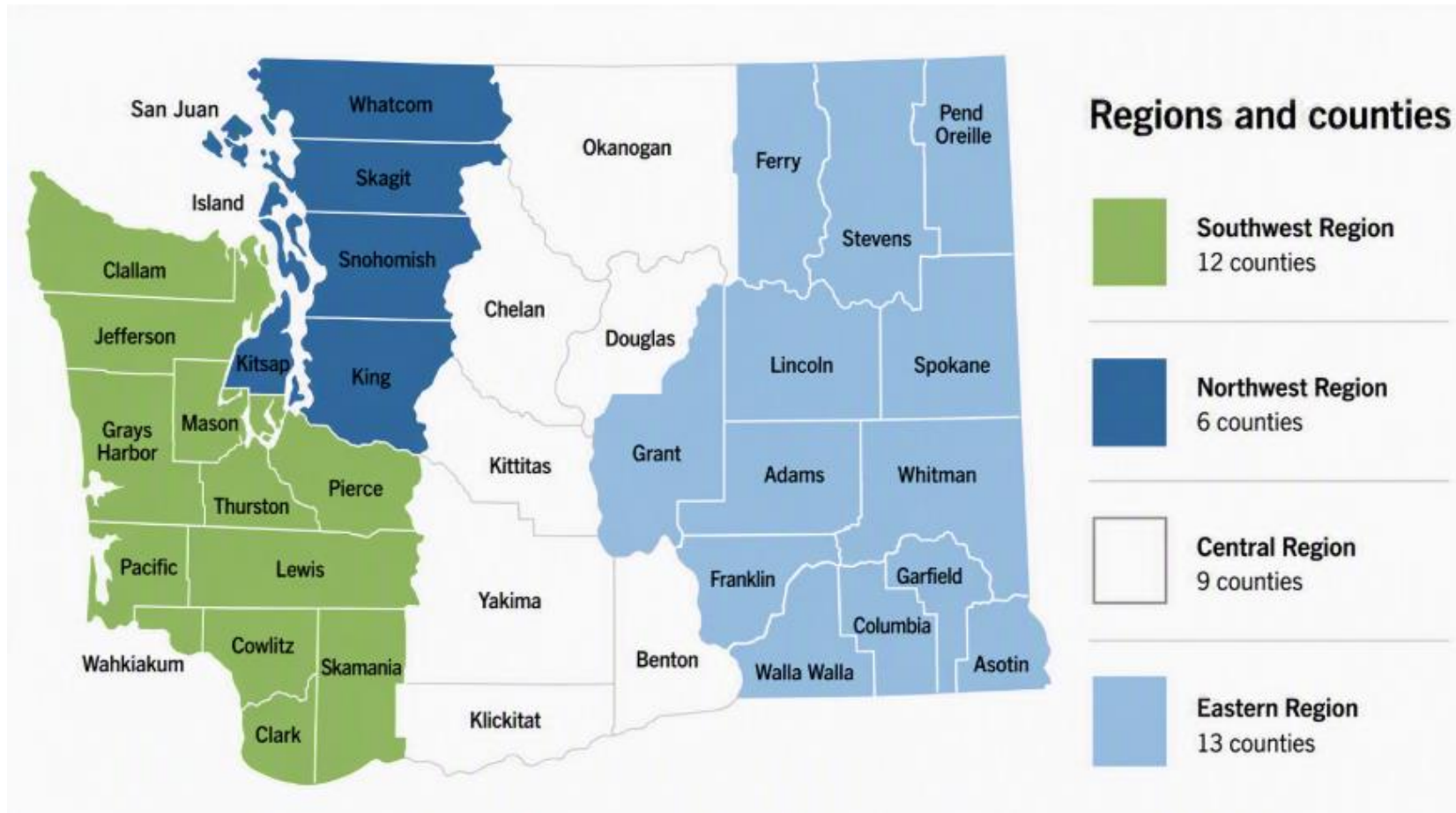
Available processing infrastructure and constraints



Current End markets

Where recovered materials go today

Regional Boundaries



Summary of Data Collection

- Existing reports, datasets, and resources
 - Ecology studies
 - WA UTC data
 - Solid Waste Management Plans
- Request for information (RFI)
- Primary data collection
 - Surveys
 - Interviews

Data Limitations

- Survey response rates
- Service provider registration data
- Self-reported data
- Unavailable or unreported cost data

Questions for Public Comment

1. **All:** Do the main findings and conclusions match what you know about recycling and composting in Washington?
2. **All:** Where does your experience differ from the access described in the preliminary needs assessment? For example, is a service listed as available but difficult to use, or missing at apartments, in rural areas, or in public places?
3. **All:** Looking ahead to the full needs assessment, what else should we consider? Are there questions, experiences, communities, or possible improvements that this draft preliminary needs assessment does not address or that deserve a closer look?
4. **Local and Tribal governments and collection service providers:** Do you have service maps, contracts, cost records, or information on the amounts and types of residential material collected or discarded that could confirm or improve the draft preliminary needs assessment findings?
5. **Recycling, transfer, and composting facilities:** Does the draft preliminary needs assessment accurately describe what facilities can accept and process? Can you share information on materials handled, usable additional capacity, or practical limits that the report may have missed?
6. **Collection providers, processors, manufacturers, and end markets:** Does the draft preliminary needs assessment accurately describe where Washington's collected materials go? Can you share information on actual destinations, amounts received, or barriers to using more of these materials?

Contracts and Costs



Contracts & Costs



Collection Service Arrangements

Categorized by UTC regulation, municipal/tribal collection, interlocal agreements, contracting with a private hauler, or franchise agreement

Reviewed DOE Box, consultant files, county SWMPs, and city/county/hauler websites, then requested any clarification from city



Collection Contract Terms

Requested contracts, then compiled and averaged data



Annual Recycling Costs

Data from service provider registrations, municipal and hauler surveys, and UTC annual reports

Converted into cost per ton, then averaged data

Contracts & Costs

Municipality recycling collection service arrangements

Geography	UTC Regulated	Municipal or Tribal collection	Interlocal Agreement	Private Hauler Contract	Franchise Agreement	None	Total
Southwest	14	3	3	37	4	9	70
Northwest	19	4	0	53	0	4	80
Central	7	2	0	11	0	29	49
Eastern	13	1	0	8	0	60	82
Total	53	10	3	109	4	102	281

Contracts & Costs

Solid waste collection contract initial term length in years

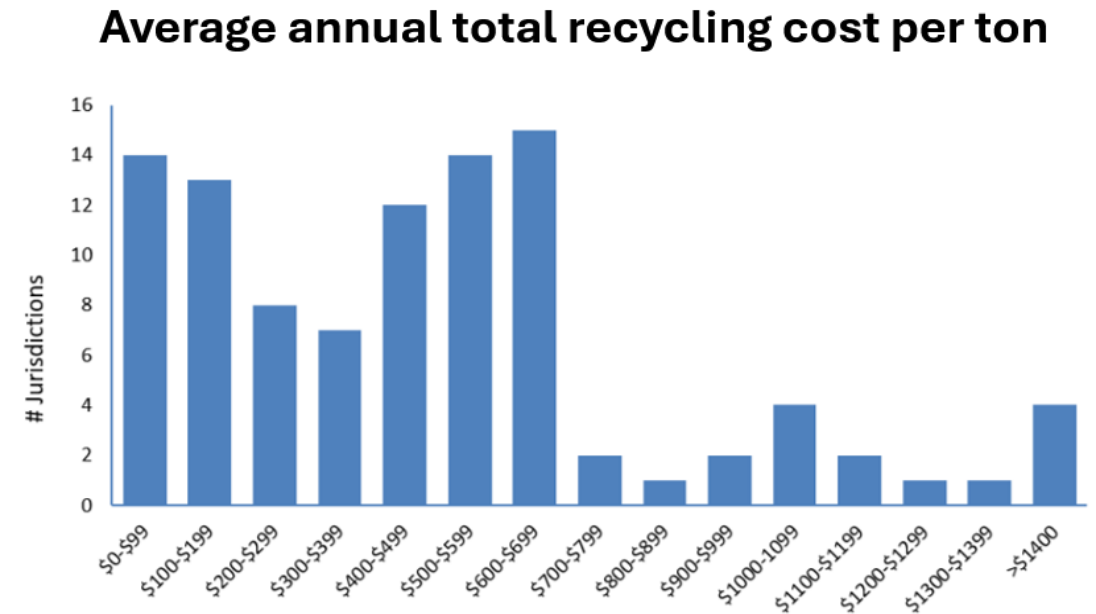
Geography	Average contract length	Most common contract length	Range of contract lengths
Southwest	9	10	5–32
Northwest	10	10	3–20
Central	9	10	5–15
Eastern	8	5	1–15
Average	9	10	1–32

Average extensions is 5 years; 15% do not include an extension and 25% automatically renew

Contracts & Costs

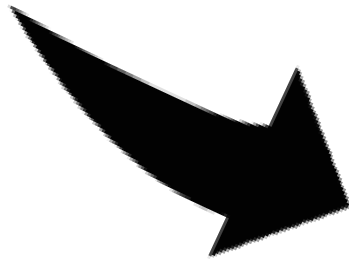
Average annual total recycling cost per ton by region

Geography	Average recycling cost per ton	Recycling cost per ton range	Data points
Southwest	\$558.64	\$64–\$1,179	53
Northwest	\$357.51	\$69–\$1,713	17
Central	\$504.95	\$111–\$2,008	9
Eastern	\$383.54	\$80–\$547	21
Total Statewide	\$431.94	\$64–\$2,008	100



Feedback Requested from Council

How can we get improvements to the jurisdiction-level cost data?



RCW 70A.208.070

Service provider registration.

(1) By January 31, 2026, and annually thereafter, each service provider that intends to seek reimbursement for services provided under an approved plan must register with the department by submitting the following information:

- (a) The contact information for a person representing the service provider;
- (b) The address of the service provider;
- (c) Identification of service areas where covered services are to be provided to covered entities;
- (d) Identification of the covered services to be provided to covered entities, by service area; and
- (e) If applicable to services provided, a report of the number of covered entities currently provided service, the number of covered entities eligible to receive service, and the total amount billed for collection for covered entities, processing services, transfer station operations provided, and tons managed during the preceding calendar year, by covered entity type and by service area. When possible, values must be separated for collection, transfer, and processing.

Q & A

Contracts and Costs



Material Quantities



RRS



Material Quantities

Methodology

1 Identified quantities of garbage, recycling, and organics from residential sources collected by service providers and self-hauled based on Ecology's waste generation and recovery data for 2024 compiled from annual reports from regulated solid waste handling facilities and the recycling survey.

2 Compiled findings from 15 regional waste composition studies completed between 2020 and 2025 to estimate proportions of covered materials and non-covered materials evaluated for inclusion on statewide collection lists.

3 Combined 2024 waste quantities to proportions of evaluated covered materials and non-covered materials to estimate quantities of covered materials produced in Washington and by each region.

Material Quantities Assessment Limitations

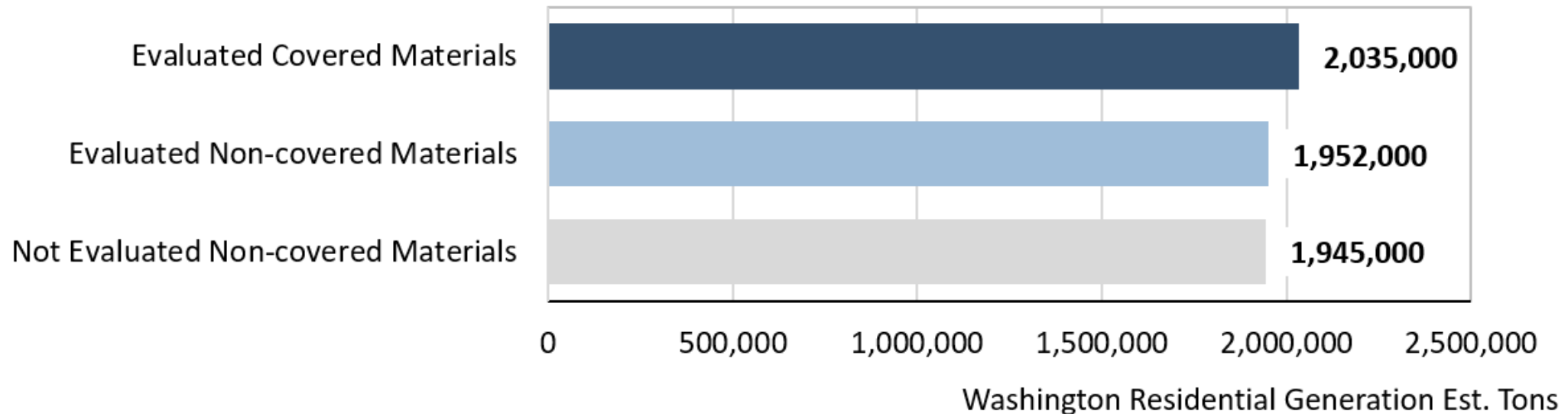
- A portion of the underlying data set is based on 2020 to 2023 data. This period includes pandemic-related temporary disruptions that impacted waste characterization findings.
- Waste quantities and waste composition data is not available to estimate covered material quantities from public spaces
- Available data do not allow us to separate residential from nonresidential self-hauled garbage
- Producer data was not available to inform or confirm the findings of the assessment.
- Limitations of waste composition data material categories resulted in the need to aggregate some evaluated material list categories.

Out of Scope

- Nonresidential generated waste
- Uncollected littered waste
- Reuse or home composting

Material Quantities

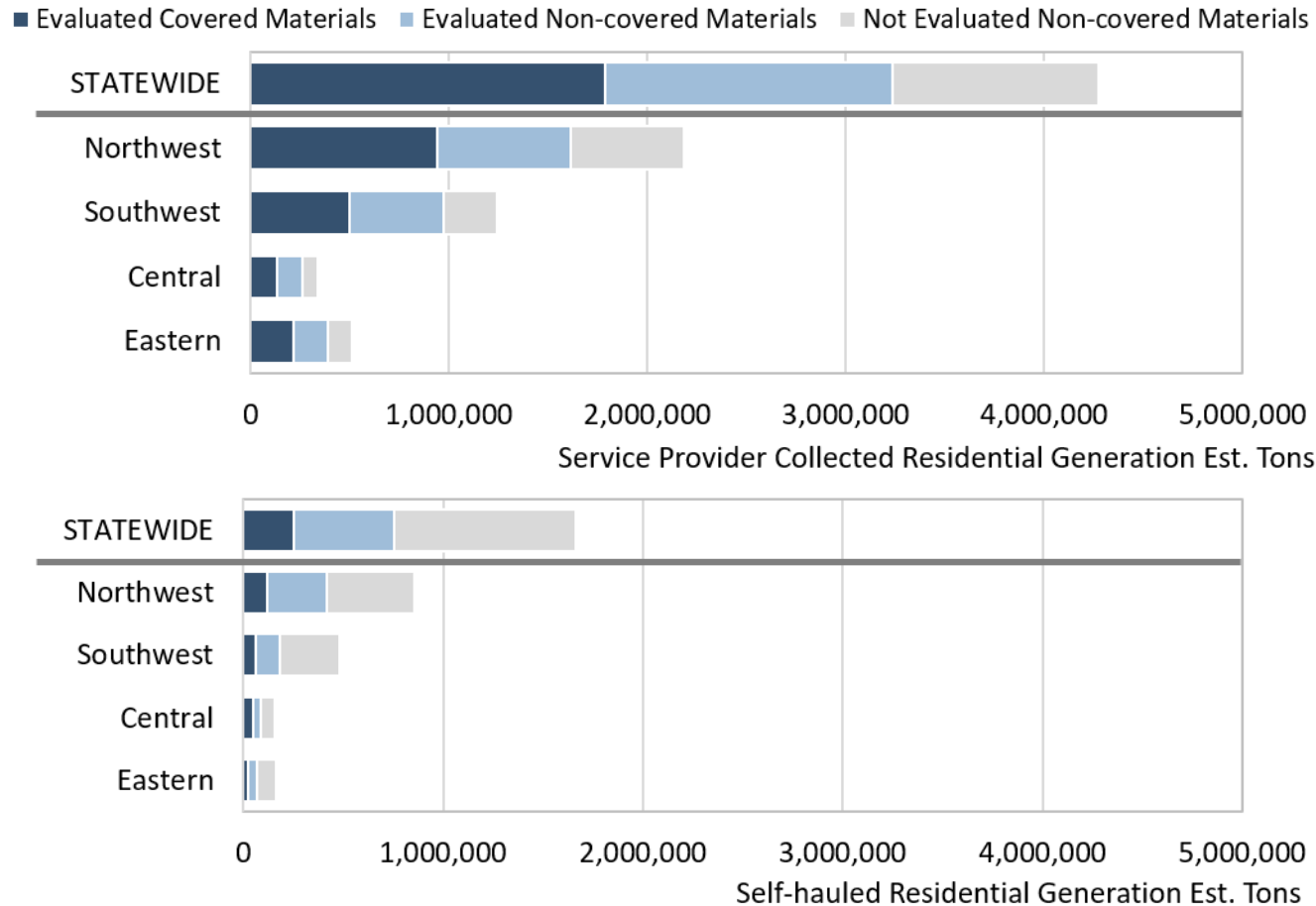
Covered materials made up 34% of Washington's 6.0 million tons of residential waste generated in 2024



Material Quantities

- **Service providers collected nearly 90% of all residential generated covered materials, an estimated 1.8 million tons**
 - The proportion of covered materials was consistent across regions, ranging from 40% to 43% of total service provider collected waste
- **An estimated 0.2 million tons of covered materials were self-hauled**
 - Covered materials made up an average 15% of total self-hauled waste

Total residential waste quantities by collection method

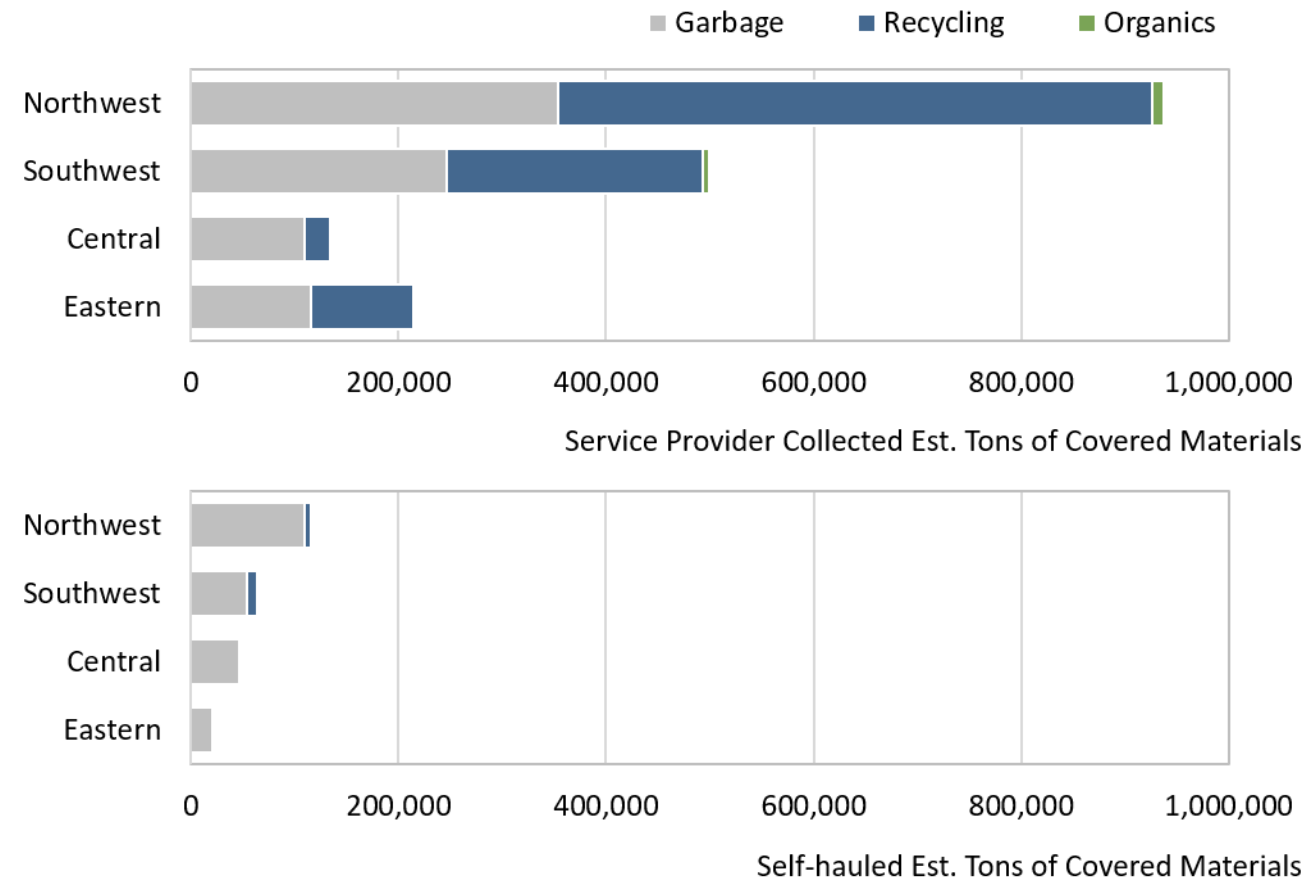


Material Quantities

48% of covered materials were collected in the recycling or organics streams statewide

- Collection in the recycling or organic streams was highest for service provider collection in the Northwest and Southwest regions
- Less than 1% of covered materials were collected in the organics stream

Quantity of covered materials by collection method and stream



Feedback Requested from Council

Guidance for clarity or boundaries for Task 3

Are there any other breakdowns of this analysis that the council would like reported? Such as estimates of material quantities of covered materials included on Statewide Collection Lists.

Where does the Council need more clarification around data gaps or assessment limitations?

Q & A

Material Quantities



Service Levels



Service Levels - Scope

- Availability of recycling collection services
- Current methods and infrastructure for servicing residents
- Any densely populated areas with no or limited curbside recycling services
- Areas where curbside garbage collection services are offered to residents but curbside recycling services are not offered

Key Findings – Recycling Collection

- Curbside recycling is more readily available in the Northwest and Southwest regions
- Statewide, **91% of single-family** and at least **69% of multifamily** residences have curbside recycling available
- Drop-off recycling is more readily available in Central and Eastern regions
- Collection typically uses carts or can for single-family and dumpsters or large containers for multifamily

Data limitations: limited data for multifamily residences and for drop-off recycling programs

Service Levels – Curbside Recycling Collection

Parameter	Statewide	Southwest	Northwest	Central	Eastern
Single-family residences with curbside recycling	91%	94%	99%	65%	69%
Multifamily residences with curbside recycling	69%	70%	86%	23%	29%
Single-family residences with limited curbside recycling	2%	2%	1%	7%	0%
Multifamily residences with limited curbside recycling	3%	1%	4%	10%	1%
Single-family residences without curbside recycling	7%	4%	0%	28%	31%
Multifamily residences without curbside recycling	9%	10%	0%	25%	33%
<i>Single-family residences with no data available</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>
<i>Multifamily residences with no data available</i>	19%	19%	10%	42%	37%

Key Findings – Organics Collection

- Curbside organics collection is more available in the Southwest and Northwest regions
- Statewide, at least **69% of single-family** and **60% of multifamily** residences have available curbside organics collection
- Statewide, at least 76% of households have access to drop-off organics programs

Data limitations: participation rates; incomplete data for curbside and drop-off organics programs.

Service Levels – Curbside Organics Collection

Parameter	Statewide	Southwest	Northwest	Central	Eastern
Single-family residences with curbside organics	69%	67%	80%	42%	46%
Multifamily residences with curbside organics	60%	66%	72%	10%	29%
Single-family residences with limited curbside organics	5%	0%	9%	3%	1%
Multifamily residences with limited curbside organics	10%	0%	18%	3%	1%
Single-family residences without curbside organics	11%	16%	1%	35%	30%
Multifamily residences without curbside organics	12%	16%	1%	39%	32%
<i>Single-family residences with no data available</i>	14%	17%	10%	20%	24%
<i>Multifamily residences with no data available</i>	19%	17%	9%	48%	39%

Key Findings – Reuse/Refill

- Reuse and refill infrastructure identified predominantly in the Northwest region

Retail locations with refill infrastructure	Southwest	Northwest	Central	Eastern
Bulk foods section within grocery chain	35	128	9	17
Bulk foods section within local grocery/co-op	9	9	6	3
Dedicated refillery	3	13	1	1
Specialty bulk retailer	2	4	0	1
Total	49	154	16	22

Key Findings –Public Places

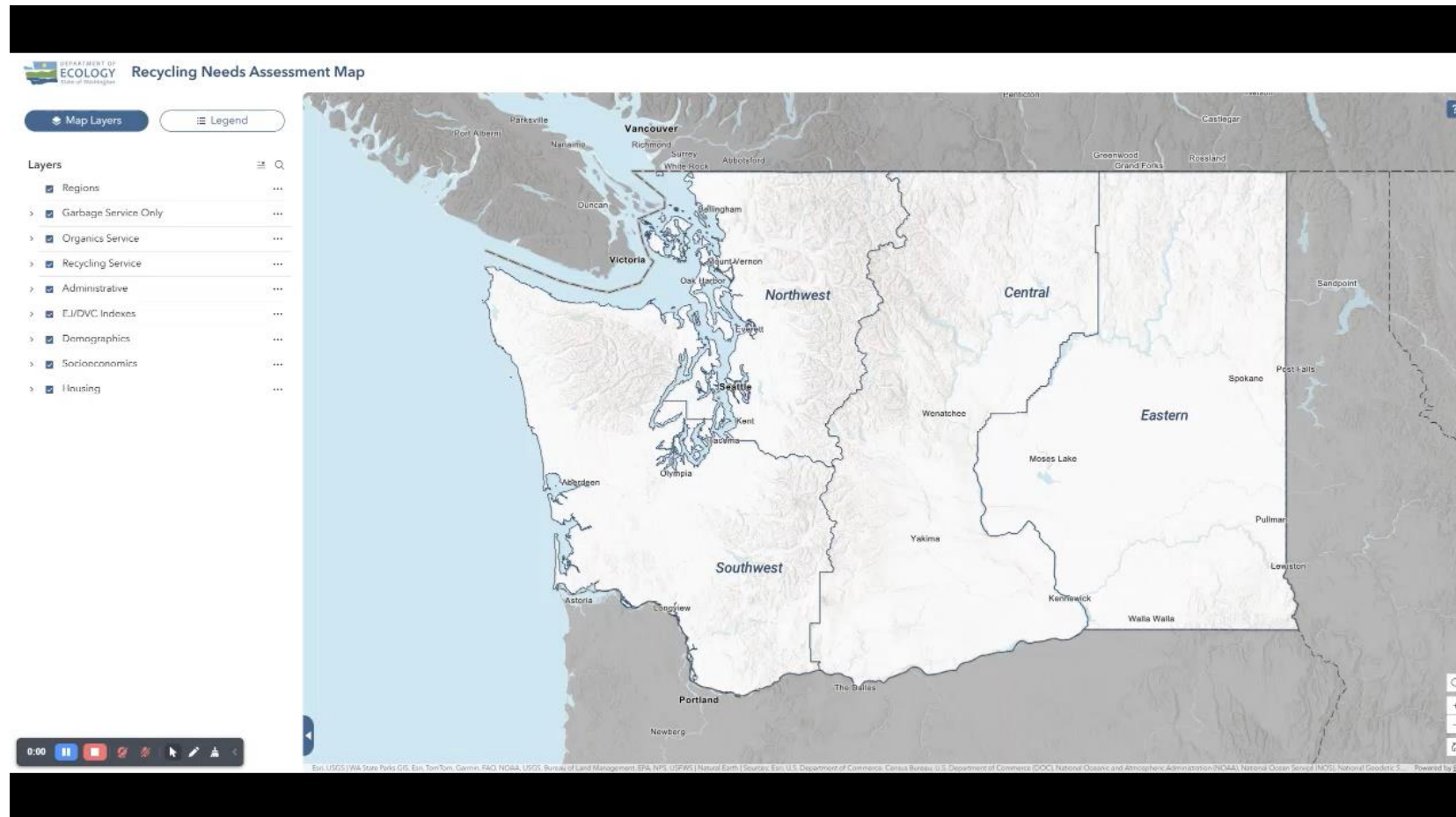
- Garbage is most common, followed by recycling and organics

Collection type	Southwest	Northwest	Central	Eastern
Garbage	95%	86%	57%	74%
Recycling	47%	50%	43%	30%
Organics	5%	23%	14%	5%

**Public place collection based on 71 responses*

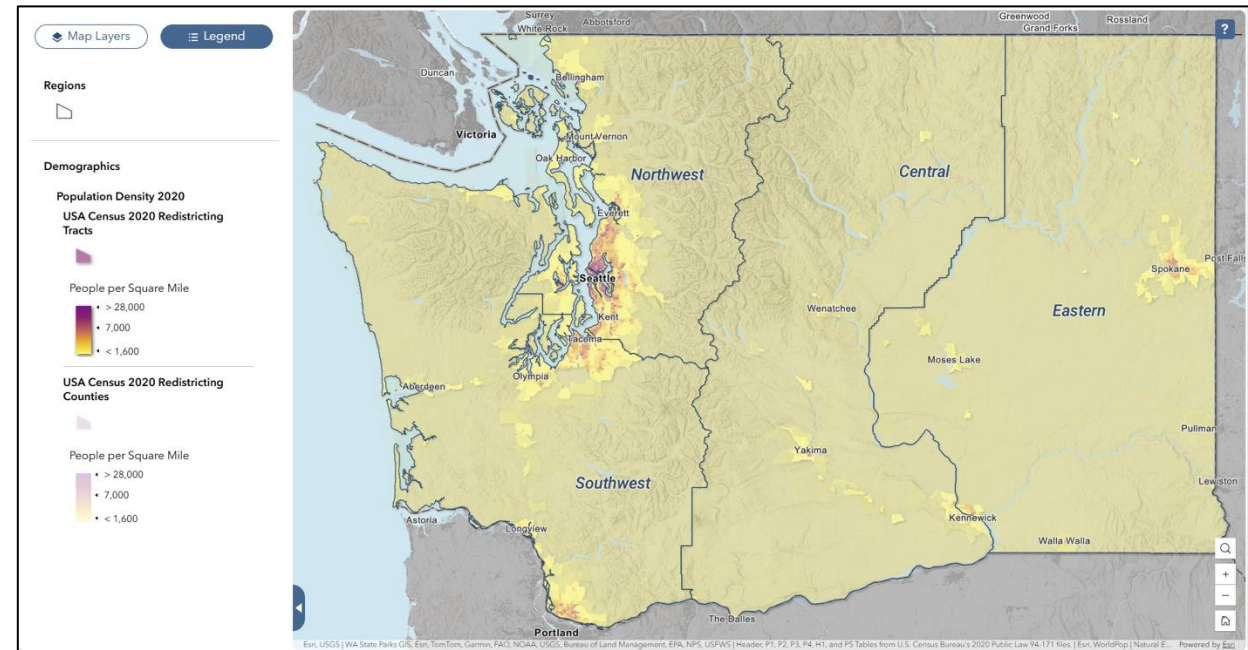
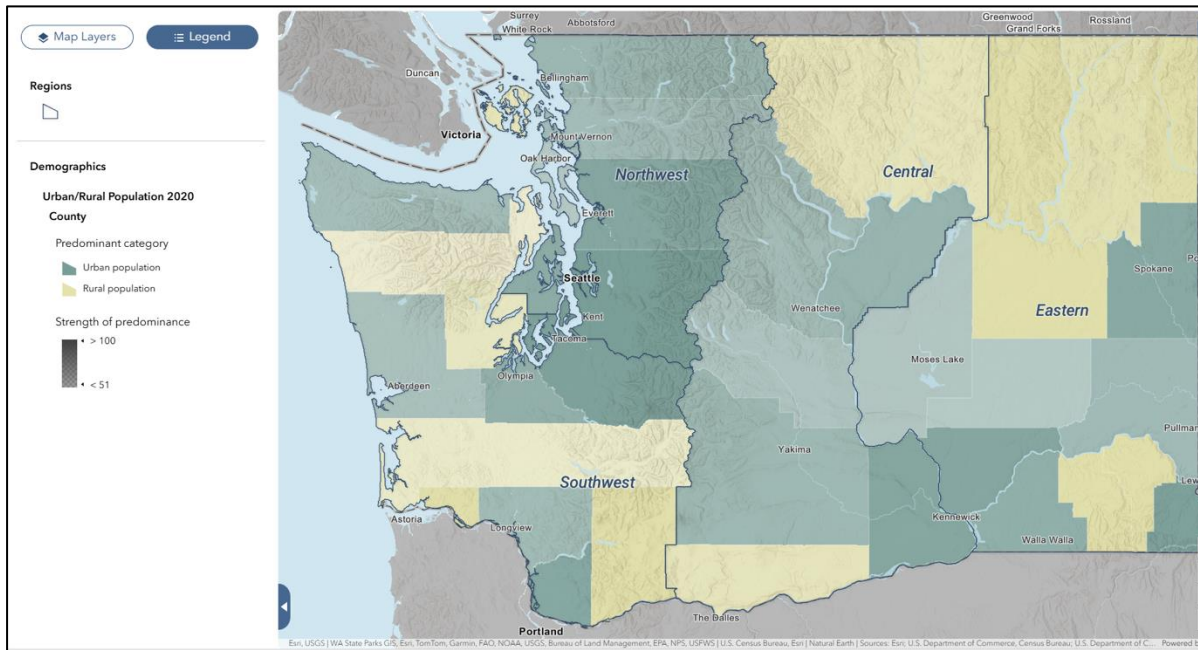
Gap Analysis

Recycling Needs Assessment Map



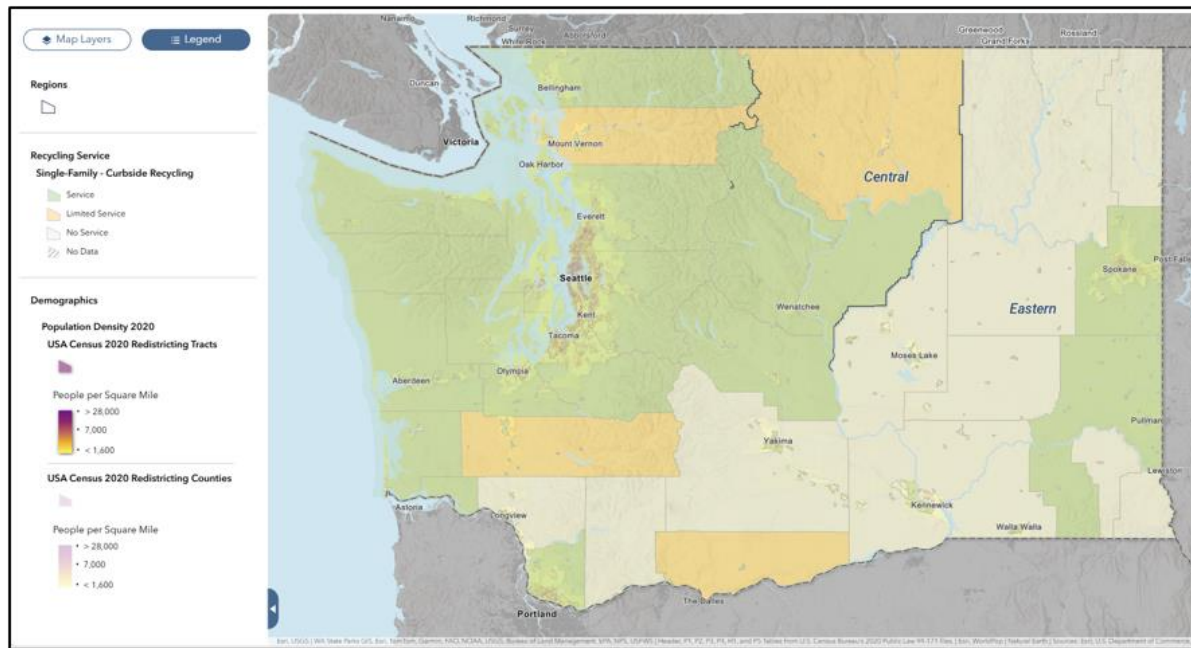
Gap Analysis

Rural/Urban and Population Density

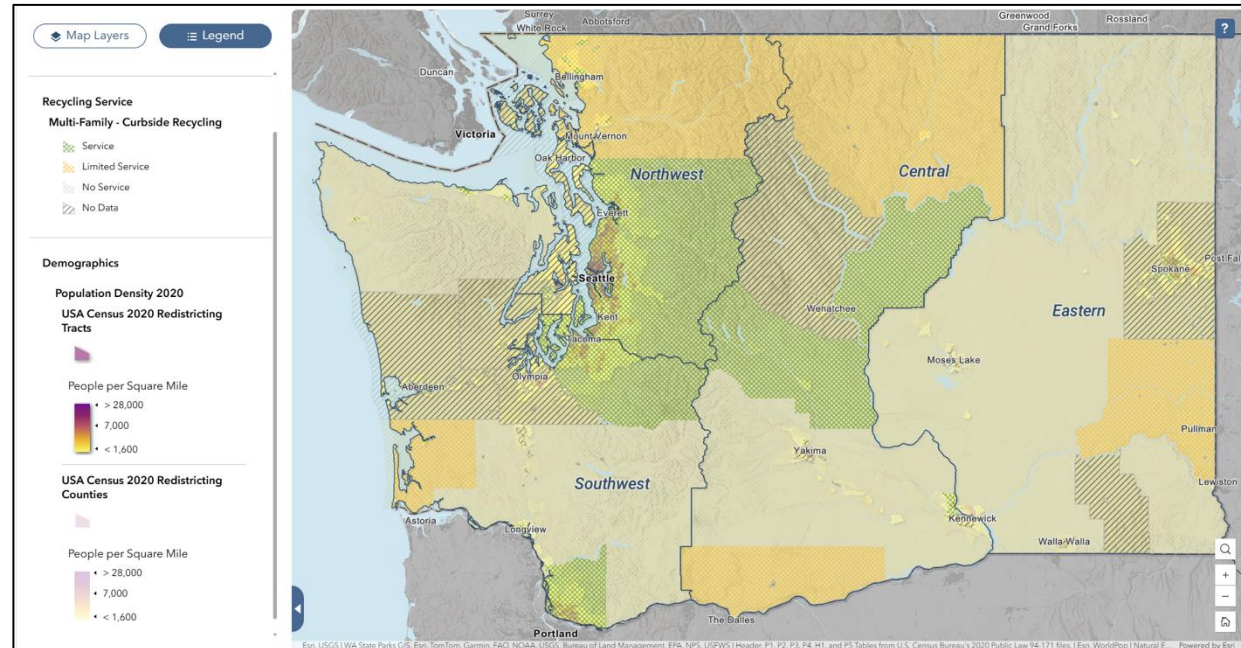


Gap Analysis

Curbside recycling and population density



Single-family curbside recycling



Multifamily curbside recycling

Data Limitations and Recommendations

- Supplemental data needed for multifamily residences curbside recycling and public places collection
- Additional data needed to understand participation in all types of collection services
- Additional data and continued engagement with Tribes
- Additional data to quantify impacts of reuse/refill programs

Feedback Requested from Council

Based on
understanding of
system and filling in
data gaps

Do statewide and regional findings regarding availability of recycling and organics services align with your expectations and understanding of the system?

Do you have any data to fill the gaps where no or limited data was available?

Do you have current data or recommendations for improving participation data?

Q & A

Service Levels

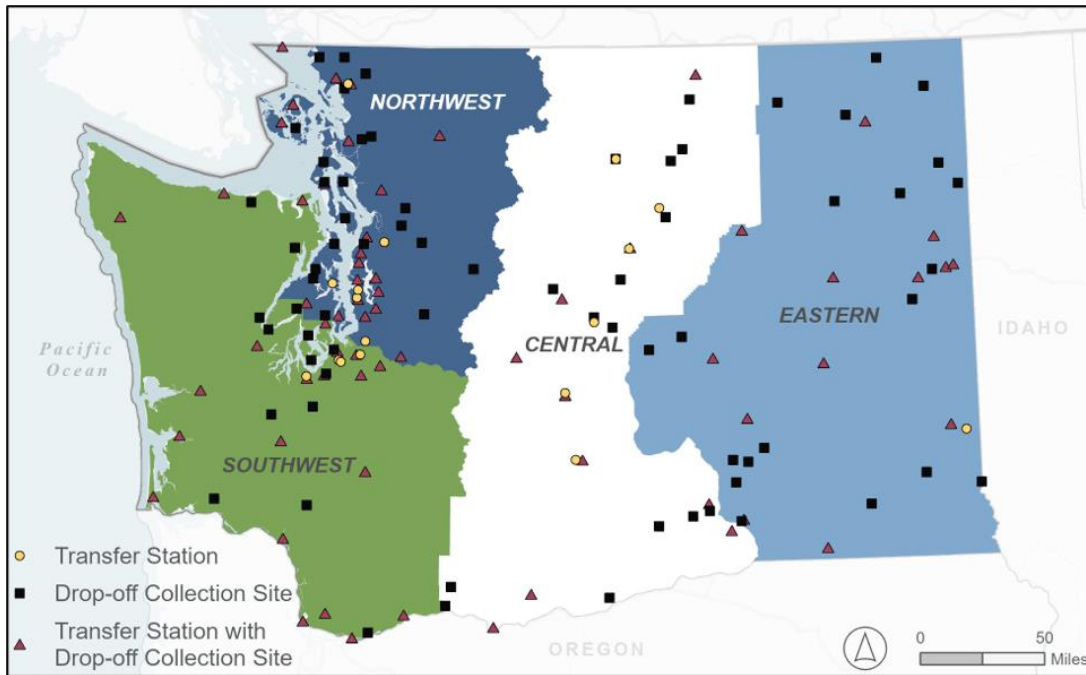


Infrastructure and Capacity



Infrastructure and Capacity

Transfer Stations and Drop-off Collection Sites



- 160 transfer and drop-off collection sites statewide.

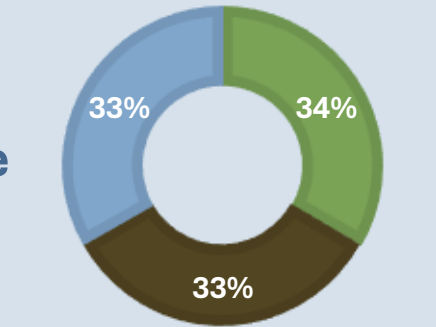
Facility type	Southwest	Northwest	Central	Eastern	Total
Drop-off collection site	16	21	14	26	77
Transfer station with drop-off collection site	21	21	10	13	65
Transfer station	4	7	6	1	18
Total	41	49	30	40	160

- 65 of 83 transfer stations (78 percent) also have drop-off collection for covered materials.

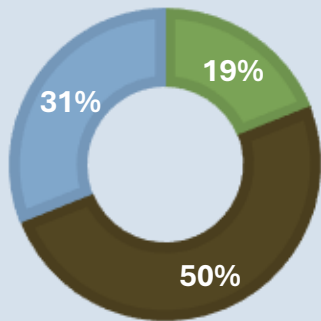
Infrastructure and Capacity

“Does this Facility Have the Capacity to Manage Additional Materials?”

- Yes
- No
- Uncertain



**DROP-OFF
COLLECTION SITE**



TRANSFER STATIONS

- 49 transfer stations (59%) have tipping floors for recyclable materials.
- Limited data was available on the statewide capacity to manage covered materials.
- Self-reported capacity from surveyed facilities ranges significantly:
 - Transfer stations reported: 50 – 32,000 TPY
 - Drop-off collection sites: 52 – 2,000 TPY
- Additional capacity will require investments in infrastructure, staffing, and/or equipment.

Infrastructure and Capacity

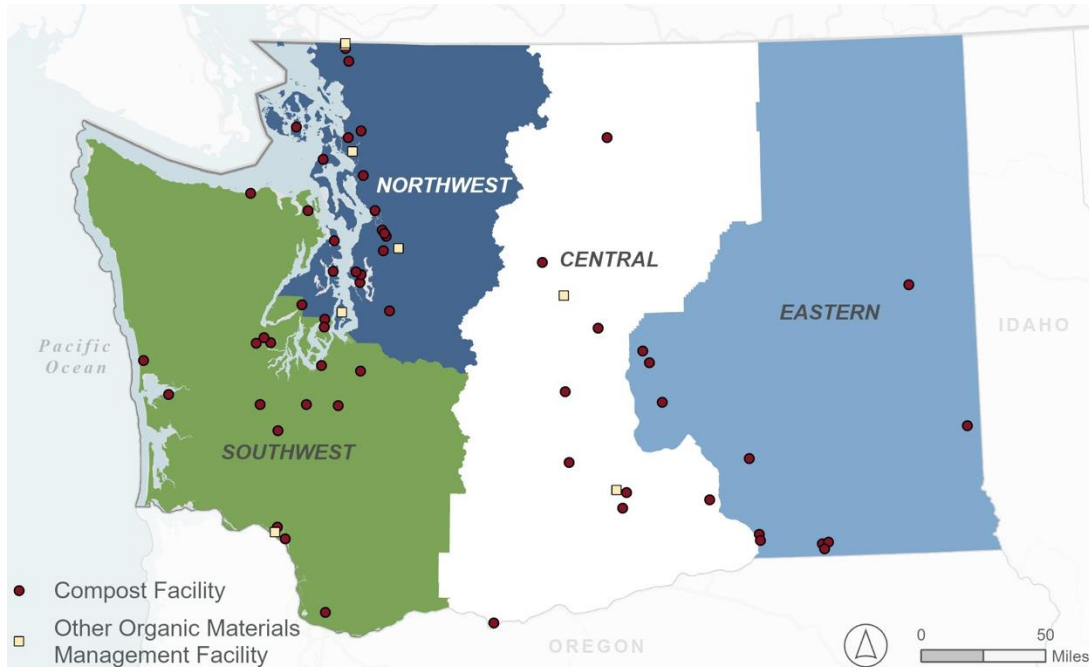
Material Recovery Facilities



- **7 Material Recovery Facilities (MRFs)** statewide.
 - 3 in the Northwest, 3 in the Southwest and only 1 in the Eastern region.
 - One MRF in the Southwest region will become a transfer facility within 2 years.
- **Current processing capacity:** 900,000 tons (excluding the closing MRF).
 - Reported MRF throughput is about **75% of total design capacity.**
- Glass is not accepted statewide due to lack of end markets.
- **Processing fees:** \$120-170 per ton

Infrastructure and Capacity

Organic Materials Management Facilities



- 65 organic materials management facilities statewide.
 - 57 composting facilities.
 - 8 other organic materials management facilities.
- More than 1.3 million tons of material managed in 2024 statewide.
- **Current processing capacity:** 24 surveyed facilities reported 1.84 million tons.
 - Limited data available on total statewide processing capacity.
 - Reported throughput is about **58% of total design capacity.**

Infrastructure and Capacity

Few surveyed facilities reported accepting certified compostable packaging

Share of 24 surveyed facilities reporting acceptance of RRA-covered compostable packaging by material type:



Feedback Requested from Council

Based on limitations experienced in this assessment.

How can participation and data sharing be improved, particularly from private sector facilities?

Are there any additional challenges regarding current capacity, materials accepted, etc. that should be captured?

Are there additional data sources, organizations, or industry organics infrastructure contacts that could help fill information gaps on and technologies?

Q & A

Infrastructure & Capacity



End Markets



End Markets

A baseline of where Washington's covered materials can be marketed today

What it covers

- In-state, out-of-state, North American, and export end markets for RRA covered materials
- Number of identified end markets and reported facility capacity by commodity

Out of Scope

- Determine whether markets are viable, robust, or meet responsible market criteria
 - Addressed in Task 3 and the final Needs Assessment

From materials to market

- 1 Covered material**
e.g., corrugated boxes, PET bottles, aluminum cans
- 2 Commodity or bale grade**
OCC, PET, mixed glass, UBC: what end markets actually buy
- 3 End markets**
Location, count, and reported capacity

Sources: Ecology data and reports, RRS end market database, U.S. Census trade data, facility and industry information, interest holder input, and Ecology RFI responses

End Markets

Washington relies on a mix of in-state, regional, and export markets

Material	In-state end markets	Out-of-state end markets	Identified capacity (tons/year)
Paper and fiber	5 OCC mills; 1 each for mixed paper, newsprint, office paper	4 OCC; 1 mixed paper	In-state: ~1.7M OCC, ~400K mixed paper
Plastics	No reclaimers identified	30 facilities (PET, HDPE, PP, film, PS)	Out-of-state: ~875K across PET, HDPE, PP, and film
Glass	1 container glass manufacturer	19 markets	Unknown
Metals	2 aluminum; 3 steel	60 aluminum; 21 steel	Unknown
Compostable packaging	5 facilities accept some formats	2 nearby facilities	~729K total organics capacity at the 5 in-state facilities

Identified capacity is total facility capacity, not capacity reserved for Washington.

End Markets

Fiber and plastics: capacity alone does not determine where material goes

Paper and fiber

~269,000 TPY

OCC exported, despite ~1.7M TPY of in-state mill capacity

- OCC, cartons, and paper cups have the strongest in-state and regional mill pathways
- Mixed paper, newsprint, and lower-value grades depend more on export markets
- Trade data shows export destinations by country, not by buyer

Plastics

0 in-state

plastic reclaimers; 30 out-of-state facilities identified

- PET and HDPE have accessible markets but compete with other states for capacity
- Film, flexibles, and some PS formats have limited facility acceptance
- Lower-value plastics are more sensitive to freight costs and bale quality

End Markets

Glass, metals, and compostable packaging face different constraints

Glass

1 in-state manufacturer; 19 regional markets

- Ardagh Seattle's 2024 closure increased reliance on beneficiation in Seattle and Portland and rail to regional plants
- Constraint is in-state capacity and logistics, not regional demand

Metals

81 out-of-state potential markets; 5 in-state

- Most identified markets of any material (60 aluminum and 21 steel out of state)
- Traceability difficult once packaging enters broader scrap streams

Compostable packaging

5 in-state facilities accept some formats

- Acceptance varies by format, and acceptance does not mean full processing
- Long-distance transport is rarely practical for organics

All materials: a market existing does not mean Washington material reaches it. Task 3 will assess capacity, stability, and access.

Feedback Requested from Council

Help us confirm and refine the inventory for Task 3

Next: 2027 End Market Assessment

- Confirming Washington sourcing at key facilities
- Market viability, stability, and responsible market evaluation
- Separating end market limits from collection and processing constraints
- Projected demand and capacity for each material over the next several years

Questions for the Council

- 1 Missing markets**
Are there missing end markets we should add, especially in Washington or the Pacific Northwest?
- 2 Validate market details**
Does anything in the inventory differ from what you see in the market, such as grades accepted or capacity?
- 3 Confirm Washington flows**
From your experience, which markets in the inventory receive Washington material, directly or through brokers?

Q & A

End Markets



What's Next?

- Public Comment Period on draft PNA (Oct 1 – Oct 30)
- Final PNA submitted to Ecology (January 2027)
- Draft Needs Assessment Public Comment (Fall 2027)
- Final Needs Assessment submitted to Ecology (End of 2027)

SUBCOMMITTEE UPDATES

- NEEDS ASSESSMENT SUBCOMMITTEE
- EQUITY SUBCOMMITTEE
- STATEWIDE LISTS SUBCOMMITTEE

PUBLIC COMMENT (10 MINUTES)

- 2 MINUTES PER PERSON
- COMMENT MUST BE RELATED TO AGENDA ITEMS
- RAISE HANDS TO SPEAK (*9 IF DIALING IN)

PREVIEW OF NEXT MEETING CONTENT

Next Steps

- Meeting materials, including meeting notes and copies of the presentations today will be published on RRAAdvisoryCouncil.org in 10 days
 - Council will receive an email when it's up
- Next Advisory Council meeting (11/19)
 - Virtual meeting
- Next In-Person Meeting
 - Any Advisory Council members able to host?
 - On-site locations that Advisory Council members would like to convene in?
 - Regions (e.g., Vancouver, Leavenworth/Wenatchee, CAA Audit Center)?

ADJOURN

- NEXT MEETING: NOVEMBER 19, 9AM-11:30AM; VIRTUAL