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NOVEMBER 2024
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THE OWL'S HEAD ADVANTAGE

Owl's Head Alloys has leveraged its reputation for customer service and quality products to open a second location in Mississippi that will serve Aluminum Dynamics LLC and other customers.



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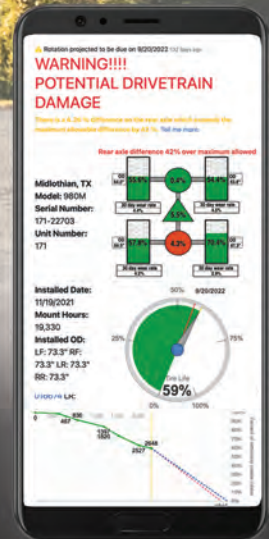
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COVER STORY

THE OWL'S HEAD ADVANTAGE

Owl's Head Alloys has leveraged its reputation for customer service and quality products to open a second location in Mississippi that will serve Aluminum Dynamics LLC and other customers.

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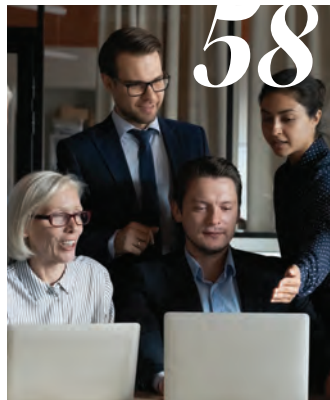
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ON THE COVER

MICHAEL BOYLE, PRESIDENT, OWL'S HEAD ALLOYS
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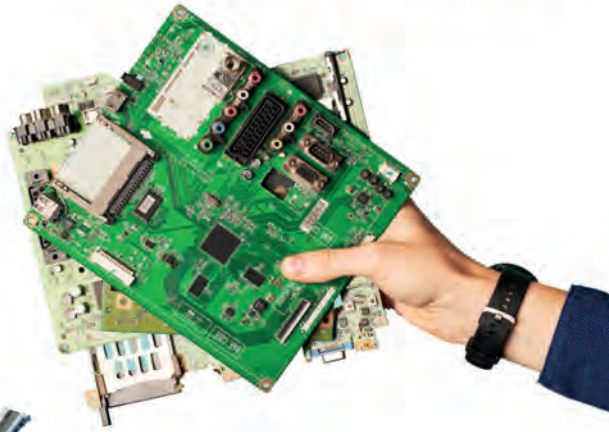


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Rebuilding trust in recycling

Scrap-fed aluminum investments continue to be announced, such as the new facility our cover profile subject Owl's Head Alloys is preparing to open in West Point, Mississippi. The growing number of investments has many people wondering where all this scrap is going to come from.

The Can Manufacturers Institute (CMI) revealed a plan to help with that by boosting the recycling rate for aluminum used beverage cans (UBCs) to 70 percent by 2030 and 90 percent by 2050. The most recent data, from 2020, has the UBC recycling rate at 45 percent.

CMI's plan, announced in late 2021, includes helping to pass and implement well-designed deposit systems at the state and federal levels. But CMI members, including Beatriz Landa of Novelis Inc., speaking at the Recycled Materials Association 2024 Roundtables in September, are saying progress in this area is unlikely.

"We've exhausted the deposit conversation; there is not an appetite for it," she said.

Getting residents to put cans in their curbside recycling bins poses another challenge, with Landa noting

60 percent of the UBCs going to landfill are from homes with curbside recycling. This lack of participation, she said, is influenced by distrust in the recycling system.

Recyclers must rebuild trust in the system by being more vocal about what they do. Open your facilities to the community to show them what actually happens once their recyclables, whether UBCs or old cars, leave their homes. Seeing recycling in action is the first step to rebuilding trust. **RT**

“**Seeing recycling in action is the first step to rebuilding trust.”**



DeAnne Toto

DeAnne Toto
Editorial Director

Letter to the Editor

The reason that the collection infrastructure for scrap plastics is anemic is because there has not been consistent market demand at a fair price for the commodity. The cyclical nature of the scrap plastic market makes capital investment almost impossible. If PepsiCo and Keurig Dr Pepper want to secure the supply required to meet their pledges, then they, and other brands, must be willing to sign long-term (15- to 20-year) contracts and commit to floor pricing. Then, and only then, will we see recovery surge because there will be a reliable ROI [return on investment] and capital will be unlocked.

Greg Janson, CEO of Granite Peak Plastics

Recycling Today received this response to the Editor's Letter written by Associate Editor Chris Voloschuk in our September issue on collection being key to plastics circularity. We recognize that plastics circularity is a multifaceted issue that must be addressed holistically.

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■ LEGISLATION & REGULATIONS

Recycling-related bills greenlit in California

As September ended, California Gov. Gavin Newsom signed a number recycling-related bills into law and vetoed another that would have created an extended producer responsibility (EPR) program for electric vehicle (EV) batteries.

Newsom signed Senate Bill 1053, which bans the distribution of single-use plastic bags in California's grocery store checkout lines starting in 2026.

S.B. 1053 was authored by state Sen. Catherine Blakespear to "close a loophole" in existing legislation, enacted 10 years ago, that allows stores to sell customers thicker plastic carryout bags that were considered reusable and met certain recyclability standards. However, Blakespear notes that bags covered by the decade-old legislation rarely are reused or recycled and end up in landfills or the environment.

Under S.B. 1053, grocery stores can offer recycled paper bags at checkout, or consumers can use their own bags for their purchases. Blakespear notes the legislation does not restrict the sale of any type of bag, rather it provides that only paper bags can be available at the point of sale.

The legislation initially was supported by state Assemblymember Rebecca Bauer-Kahan, who authored an identical bill, A.B. 2236, that was pushed through the California assembly to help build momentum for the policy.

Both bills were supported by more

than 200 organizations, including Californians Against Waste, the California Grocers Association, Ocean Conservancy and Oceana.

Additionally, Newsom signed the Responsible Textile Recovery Act of 2024, or S.B. 707. The law establishes an EPR program for the collection and recycling of apparel or other textile articles deemed unsuitable for reuse by consumers in their current conditions.

The law, first authored by Sen. Josh Newman in 2023, is considered the first EPR textile recycling program in the U.S. and requires participants in the textile value chain to take responsibility for the entire life cycle of their products, including repair, recycling and reuse of garments and fibers.

Once implemented, Newman says S.B. 707 not only will reduce the number of textiles sent to landfills but also support the development of upcycling and recycling across the state and help address the environmental impacts of "fast fashion" and the "throwaway culture it has abetted."

The legislation received support from nonprofit organizations such as the California Product Stewardship Council (CPSC), retailers Ikea and Goodwill and Phoenix-based hauler Republic Services Inc., as well as from local governments, agencies and sanitation districts.

The law requires CalRecycle to adopt regulations governing the

program and, beginning Jan. 1, 2032, to reassess the adopted regulations to include adjusting the minimum required collection sites, establishing a minimum recycling efficiency rate for covered products collected and recycled by program operators and establishing other program criteria.

The law also establishes the Textile Stewardship Recovery Fund in the state treasury to receive all the money collected through program operators and would make funds available to CalRecycle for program purposes. CalRecycle will be able to impose fines that do not exceed \$10,000 per day for violations of the program's requirements or that do not exceed \$50,000 per day in cases of intentional, knowing or reckless violations.

Newsom also signed S.B. 1143, expanding the range of products covered under the state's paint recycling program, managed by PaintCare.

PaintCare is a nonprofit organization that has been active in California since 2012, representing paint companies and organizing stewardship programs for leftover architectural coatings in states with stewardship laws.

With his signing of S.B. 1143, the program's list of covered products expands to include additional nonindustrial coatings and coating-related products, as well as aerosol coatings, by 2028.

An EPR bill that would have required all EV batteries in the state to be reused, repaired, repurposed or remanufactured and eventually recycled at end of life was sent back to the state's Senate without Newsom's signature.

Under S.B. 615, introduced by Sens. Ben Allen and Dave Min, the Department of Toxic Substances Control (DTSC) would be responsible for adopting regulations to implement and enforce the bill's requirements and for establishing a method for EV battery suppliers, secondary users and handlers and qualified facilities to report EV battery transactions.

The bill also would impose fines of up to \$50,000 per day for battery suppliers that don't comply with its rules, with fines of up to \$100,000 per day if the violation is deemed intentional. Had S.B. 615 passed, the DTSC would have needed to adopt the bill's regulations by July 1, 2028.



■ METALS

North American aluminum demand increased in the first half of 2024

According to preliminary estimates from the Aluminum Association, based in Arlington, Virginia, aluminum demand in North America, which comprises the U.S. and Canada, increased 5.2 percent year over year through the first half of 2024. This follows a year of softer demand in 2023 primarily driven by industry destocking and an approximate 25 percent decline in imports.

The demand data were part of the “Aluminum Situation” report produced monthly by the Aluminum Association.

“Customers and end consumers have made it clear that they want sustainable, recyclable materials like aluminum,” Aluminum Association CEO Charles Johnson says. “Our members are investing in production and jobs in the United States to help meet this demand both now and in the future.”

The report found that aluminum demand in the U.S. and Canada (shipments by domestic producers plus imports) totaled an estimated 14,056 million pounds through the first half of 2024, an increase of 5.2 percent compared with the first half of 2023, when demand was 13,365 million pounds.

Semifabricated, or mill, product demand remained largely steady year over year through the second quarter, according to the report, while sheet and plate demand rose 7.5 percent and foil, extruded products and electrical markets declined.

Aluminum exports (excluding scrap) increased by 25.6 percent year to date, and imported aluminum and aluminum products into North America decreased 14 percent over that same period.

The association’s Index of Net New Orders of Aluminum Mill Products (baseline index of 100) increased 1.1 percent through June, coming in at 105.97.

In the last decade, Aluminum Association member companies have announced more than \$10 billion in domestic manufacturing operations, including new, U.S.-based greenfield facilities, for the first time since the 1980s. Aluminum

production in the U.S. is growing thanks to increased demand for sustainable packaging, safe and efficient vehicles, greener buildings and vital infrastructure, the association says.

Scrap generation appears to have slowed as demand has grown, however, with one secondary producer saying the market is softer than it was a year ago.

“It’s not as robust,” Michael Boyle, president of Owl’s Head Alloys, headquartered in Bowling Green, Kentucky, says of generation in September. (For more about Owl’s Head Alloys, see the cover profile starting on Page 28.) “On the scrap supply side, everyone’s chasing the same pounds right now.

“We just didn’t see that big [scrap] flow pick up like we usually do on a seasonal basis,” he says of May. “People are fighting over the same metal units at this point, and something has to change.”

In his commentary in the “Bureau of International Recycling World Mirror on Non-Ferrous Metals” for October, Rick Dobkin of Shapiro Metals, St. Louis, writes: “As for recycling, we are starting to see some of the greenfield aluminum expansions entering the marketplace and causing sporadic shortages of certain items. Rolling mill scrap was very tight recently but now seems to be a little better balanced. Extrusion scrap is hit or miss. Whereas that part of the business had been expected to return to growth in the second half of this year, people are now saying any improvements are likely to come in mid-2025. On the secondary aluminum side, export markets have been faltering of late amid reduced pricing and demand. Demand seems reasonable and stable domestically.

“We are entering the period of contract negotiations for 2025, with the mills concerned about availability of scrap given increased demand from the new operators,” Dobkin adds. “There have been some recent calls to prohibit the export of scrap metals, but these have not gained much traction as yet.”



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■ **PLASTICS, LEGISLATION & REGULATIONS**

Plastics producers fined in Washington

The Washington Department of Ecology has fined 35 plastic producers a combined total of \$416,554 for violating the state of Washington's recycled-content law. The department says the companies did not include enough recycled material in plastic trash bags and beverage containers covered under the law.

These are the first penalties issued under the 2021 state law S.B. 5022 aimed at reducing waste and pollution from plastics.

The penalties were based on the amount of plastic each company sold in Washington and how far from the recycled-content requirements they were. Fines ranged from \$39 to \$67,196.

Under the 2021 law, plastic packaging producers are required to report the weight of new and recycled plastic sold in Washington. Producers that fell short of the recycled-content requirements were issued penalties.

Two producers issued penalties, Admiral Beverage Corp. and Lassonde Pappas, requested and received corrective action plans. Half their fines were suspended in exchange for a plan to achieve future compliance. All producers

were offered this option, and five remain eligible, including CAB Enterprises Inc., Heaven Hill Distilleries Inc., Jim Beam Brands, Langer Juice Co. Inc. and Premier Nutrition Co. LLC.

The Washington Department of Ecology is responsible for implementing the law. It began registering producers and accepting annual fee payments in 2022. Minimum recycled-content requirements took effect for several types of products covered under the law in January 2023. Companies that produce plastic trash bags were required to include a minimum of 10 percent-recycled content, and beverage container producers had to include at least 15 percent-recycled content.

The Clorox Co. faces the largest penalty. According to its 2024 integrated annual report, 10 percent of the plastic used in its packaging contained postconsumer recycled (PCR) content as of Dec. 31, 2023. This differs from 2018, when the company reported an 11 percent baseline.

Of the 128 companies required to meet recycled-content requirements, 93 met or exceeded those benchmarks, the Washington Department of Ecology reports. The department registered 310 producers, but 182 are exempt from the requirements because of their low revenues or the low weight of plastic sold into the state.

More companies will be required to

meet these standards in the coming years as the law expands to cover a wider range of products and as requirements for recycled content increase. By 2036, Washington's law will cover packaging for various types of common consumer products, requiring a minimum of 50 percent-recycled content for most of them.

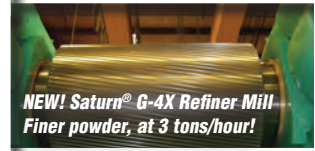
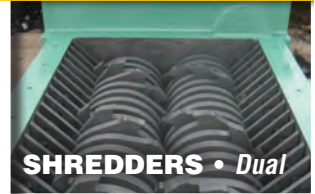
The following companies were issued penalties:

- Admiral Beverage Corp., \$4,630;
- Albertsons Cos., \$41,954;
- Angelcare USA, \$44;
- Arcadia Farms LLC, \$1,229;
- Arizona Beverages USA, \$6,391
- CAB Enterprises Inc. (Electrolit USA), \$1,895;
- Chobani LLC, \$39;
- Danone US LLC, \$6,285;
- Del Monte Foods Inc., \$243;
- good2grow LLC, \$2,953;
- Heaven Hill Distilleries Inc., \$15,525;
- Herbalife International of America Inc., \$91;
- HP Hood LLC, \$6,681;
- Jim Beam Brands Co./Suntory Global Spirits Inc., \$4,220;
- Johanna Beverage, \$63;
- Kraft Heinz Foods Co., \$3,697;
- KSF Acquisition Corp., \$24,582;
- Langer Juice Co. Inc., \$11,530;
- Lassonde Pappas and Co. Inc., \$5,646;
- Milo's Tea Co. Inc., \$5,644;
- Ocean Spray Cranberries Inc., \$53,568;
- Premier Nutrition Co. LLC, \$2,341;
- Richardson Bottling Co. (Mountain Mist), \$1,658;
- Sazerac Co. Inc., \$32,758;
- Soylent Nutrition Inc., \$505;
- Talking Rain Beverage Co. Inc., \$59,831;
- The Clorox Co., \$67,196;
- The Kroger Co., \$9,021;
- Topco Associates LLC, \$2,098;
- Trader Joe's, \$2,381;
- Tradin Organic, \$3,275;
- Tree Top Inc., \$20,333;
- Uline Inc., \$14,991;
- Walgreen Co., \$1,206; and
- Welch Foods Inc., \$2,050.

"Most producers see the value in using recycled content in their products," says Peter Lyon, solid waste program manager at the Washington Department of Ecology. "We need to continue working together to improve our recycling system and reduce the pollution and contamination that come from producing new plastic."

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5 QUESTIONS ABOUT FOOD WASTE DEPACKAGERS

1 Why should I invest in a food depackaging system?

Depackagers take packaged food waste and liberate the organics, creating a purified organic slurry, and press the discarded packaging fraction for maximum recovery of organics. A robust depackager achieves capacity in excess of 18 to 20 tons per hour (tph), higher recovery of organic material with increased purity, faster unloading times and helps you comply with state mandates (like California's S.B. 1383) for organic recovery and diversion from landfill. Accepted materials include preconsumer packaged food waste, preconsumer mixed source-separated organics (SSO), postconsumer food waste, supermarket and restaurant waste, frozen foods, beverage cartons and bottles and canned food and beverages. With a depacking system, you won't have to turn away organic tonnage in packaging!



contamination in SSO material will increase. This is problematic for vertical depackagers as heavy nonorganic contaminants are not easily ejected vertically. Capacity and screening surface are limited, which result in losing more organics to residue. Horizontal depackagers easily eject heavy contamination, and a gentler hammermill design can be used that features flexible hammers spinning at a much lower rpm. A large, rotating 360-degree screen results in higher throughput with limited downtime, a minimal amount of organics lost to residue and very few microplastics in the organics.

2 What are the different kinds of food depackagers?

Manufacturers use either a horizontal design or a vertical design. A vertical design allows gravity to feed the unit via a feedhopper, creating a compact and inexpensive feed system. Horizontal designs use feed systems requiring slightly more space. An inground feed hopper system blends and stores a variety of bulk materials, which are then conveyed to the depackager. Horizontal depackagers are more suited to high-capacity operations receiving bulk items and are easily fed by a loader or by collection trucks dumping directly into the bunker.

3 What are the advantages of the horizontal depackager?

As mandates for organics recycling become widespread,

4 Do I need a shredder or presort station prior to my depackager?

Depending on your inbound SSO contamination rates, mechanically removing oversized residue/film prior to the depackager can be beneficial. The SMICON depackager system does not require presorting and is able to handle the wide array of nonorganic residue typically seen in SSO material. Basic floor sorting using a material handler or loader is sufficient, and problematic items can be identified on the tipping floor to be crushed or removed before entering the depackager.

5 What are the end markets for this material?

The organic slurry, or 'cake' (depending on moisture levels), can be sold to composting, sewage treatment, animal feed operations or anaerobic digestion companies for recycling or waste-to-energy applications. Each end market will have different purity and moisture requirements. Contact Van Dyk for more information.



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‘SUBDUED’ IS OPERATIVE WORD IN RECYCLED STEEL MARKET

WITH THE 2024 RECYCLED STEEL MARKET IN ITS FINAL QUARTER, generators, processors and traders continued to wait for a pricing rebound as the October U.S. mill buying period began.

The situation in September was similar to the previous eight months, with most buyers of U.S. ferrous scrap unwilling to raise their offers for prompt grades, shredded steel or No. 1 heavy melting steel (HMS).

Domestic mill transaction buying prices from late August and the first three weeks of September collected by Pittsburgh-based MSA Inc.’s Raw Material Data Aggregation Service showed the value of No. 1 HMS holding steady nationally, while shredded steel dropped by \$7 per ton in value and the prompt industrial composite average tracked by RMDAS dropped by \$2 per ton.

A report written by George Adams, the CEO of Orange, California-based SA Recycling, distributed by the Ferrous Division of

the Brussels-based Bureau of International Recycling, provides several insights as to why the ferrous market has been stagnant or, as Adams put it, “subdued” this year.

While Adams notes several reasons the market for his company (which has locations throughout the U.S.) has been lackluster this year, he cites factors that could cause upward price pressure in the upcoming winter months.

“While July and August trades were drawn out and contentious, the battle in the end was generally for sideways prices,” Adams says. “Dealers were heard to say, ‘I’ve never fought so hard for nothing in my life.’ The result was determined by a combination of weak new steel orders, giving the mills ammunition, and less recycled steel in the market, supporting dealer prices.”

After noting September negotiations brought more of the same, Adams cites flat conditions for hot-rolled coil (HRC) steel as contributing to the ceiling on recycled steel

“**There have been several electric arc furnace startups already this year, with more to come in 2025. EAF demand for recycled steel will increase.**”

– George Adams, CEO, SA Recycling

prices. HRC pricing reflects negatively on the price of recycled steel as there is little to support increases in the U.S. domestic market.

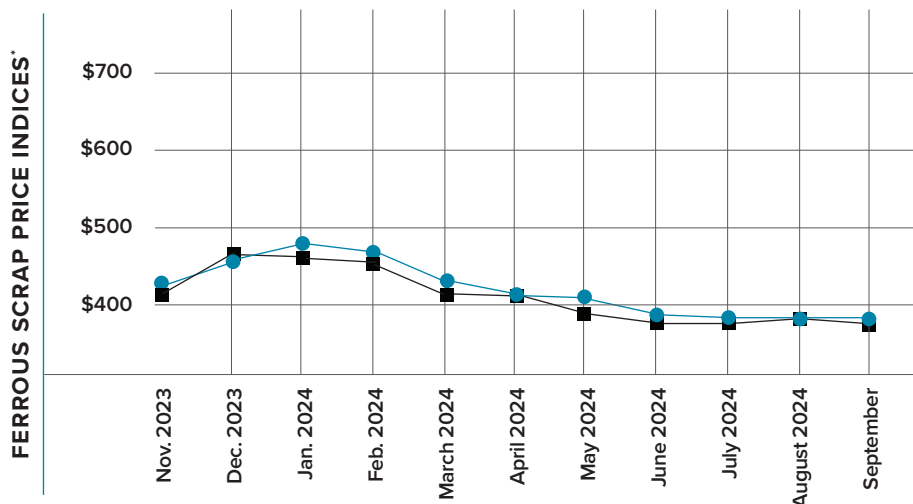
“The export market has presented a similar scenario: shipments on both U.S. coasts have seen prices weaken over the summer, although limited recycled steel availability has been somewhat supportive,” Adams says.

“Weakness in China has been the underlying problem for export prices internationally as cheap Chinese billet flooded the markets at ever cheaper prices this summer. This included the Turkish market, thus lowering U.S. bulk sale prices.”

With the export market tepid, Adams says U.S. dealers had little ammunition to fight for higher recycled steel prices this summer.

One potential bright spot is the recent Chinese stimulus announcements that have changed that dynamic. Chinese billet already has

Additional Raw Material Data Aggregation Service (RMDAS) pricing from Pittsburgh-based Management Science Associates (MSA) is available on *Recycling Today’s* website at www.RecyclingToday.com/rmdas.



● Davis Index, No. 1 Busheling: National average price in U.S. dollars per gross ton delivered to U.S. consumer ■ RMDAS Ferrous Scrap Price Index: Per gross ton for No. 2 shredded scrap, defined as 0.17 percent or greater copper content, effective the 20th of each respective buy month

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No. 1 Heavy Melting Scrap
\$310

No. 1 Busheling
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Shredded
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U.S. FERROUS SCRAP
BULK EXPORT PRICING**

HMS 1 & 2
East Coast
\$336.81

West Coast
\$314.86

seen a price increase on the international market, thereby helping to make U.S. recycled steel more attractive to international buyers.

Another factor that could contribute to higher U.S. ferrous prices, Adams says, is a decline in collections at a time when demand for recycled steel is increasing.

“There have been several electric arc furnace (EAF) startups already this year, with more to come in 2025,” he says. “These mills consume 100 percent-recycled steel and its alternatives. [Thus,] EAF demand for recycled steel will increase.”

Trade restrictions also

could play a role if prices rise.

“More countries will try to keep recycled steel from leaving their shores so they can use it for their own needs,” Adams says, putting less recycled steel into the international market.

Looking at the October mill buying period in the U.S., Adams sees little on the demand side to support much more than sideways pricing for another month.

“October is the last real month this year for substantive collections of recycled steel as both November and December are punctuated by holidays, including Christmas and New Year, which fall on

Wednesdays. That effectively cancels out two whole weeks of collections in December. If collections are weak for the rest of this year, it only gets worse in January and February as winter weather sets in. That could create a limited supply of recycled steel at a time when, traditionally, there is [mill] restocking.

“Mills ... may have to buy early or face recycled steel shortages thereafter,” Adams continues. “That is what dealers see as their support in the near term for some upside in pricing. While the increases may be modest, there is potential for higher recycled steel prices before year-end.”

Davis Index Private Ltd. is headquartered in Singapore with market analysts in Barcelona, Spain; Chicago; Dallas; Dnipro, Ukraine; Los Angeles; Mexico City; Pune, India; Singapore; and Toronto. Davis publishes physical market price indexes in more than 80 countries, and its market coverage comprises ferrous and nonferrous scrap, secondary nonferrous alloys, base metal premiums, finished steel products in specific geographies, bulk freight and container freight. Davis publishes indexes on a daily, biweekly, weekly and monthly basis, depending on the type of material and the open-market trade volume for each material. Methodology information is at <https://davistexteditor.s3.amazonaws.com/DavisIndexMethodology.pdf>. To subscribe, visit www.davisindex.com.

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TRANSPARENCY, TRACEABILITY NEEDED IN RECYCLED COPPER SUPPLY CHAIN

AS NEW SECONDARY COPPER SMELTING AND REFINING CAPACITY RAMPS UP IN THE U.S., more transparency will be required of scrap suppliers, according to two panelists at the Recycled Materials Association (ReMA) Roundtables in Chicago this September.

“Who we source from matters,” said Naveed Moghadam, commercial director at Aurubis Richmond, the new secondary smelting facility Germany-based Aurubis opened in September in Augusta, Georgia.

He said the company is looking to secure scrap deliveries from suppliers that follow best practices and have clear procedures.

Recycled content traceability is growing in importance, said Aldo Jordan, founder and president of The Metals Agency in San Francisco, adding that consumers will demand more visibility into the scrap they are melting over time.

“The recycling supply chain will have to be more

transparent and green our footprint,” he said.

While the U.S. Department of Energy added copper to its list of critical raw materials last year, reflecting its growing importance of energy transition technologies, the U.S. Geological Service denied the Copper Development Association’s request to add the metal to its U.S. Critical Minerals List in May of last year. The USGS cited its statistics showing U.S. imports of refined copper come largely from Chile, Canada and Mexico, “reliable trade partners with whom the U.S. has free trade agreements” rather than from countries of concern.

Copper’s year-over-year compounded growth rate was 3.3 percent from 1950 to 2022. With that expected to increase by two to three times over the next decade, Jordan said it is clear the fight for copper supply is global and that a critical distinction would help ensure supply for the domestic market.

Moghadam noted the low

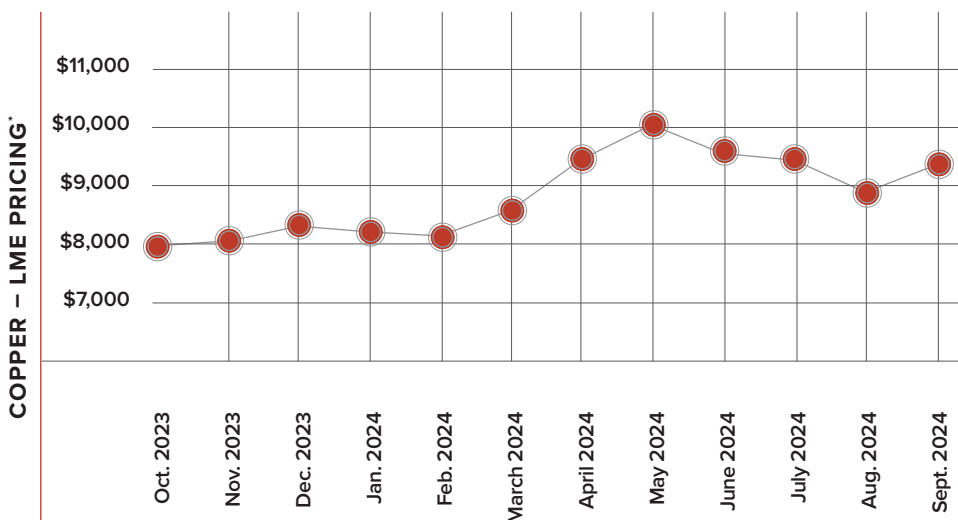
“**The recycling supply chain will have to be more transparent and green our footprint.**”

– Aldo Jordan, founder and president, The Metals Agency

recycling rate for copper-containing printed circuit boards (PCBs) in the U.S., estimating the rate to be 18 percent versus 40 percent in the European Union.

PCBs are among the types of scrap Aurubis Richmond will consume once the facility begins operating. Moghadam said the site will begin buying end-of-life products that contain 20 percent to 50 percent copper, including shredder heavies, low-grade insulated copper wire, meatballs and No. 2 scrap, for delivery later this year to the company’s European smelter network. Aurubis Richmond will begin building its scrap inventory in the first quarter of next year for processing on-site starting in the second quarter. The company plans to provide a long-term sustainable domestic home for exports that currently go to Southeast Asia.

Jordan added that while the recent investments in new copper smelting capacity in the U.S. are great, “a lot more is needed,” particularly for lower-grade scrap.



*Average monthly settlement price, cash buyer, in U.S. dollars per metric ton; source: London Metal Exchange, www.lme.com

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CORRUGATED MARKET CONTINUES TO RECOVER FROM HURRICANE DAMAGE

THE PAPER INDUSTRY CONTINUED TO RECOVER

from the effects of the catastrophic hurricanes that hit the southeastern U.S. in October, affecting the flow of paper in the third quarter and the outlook for the rest of the year.

In a quarterly report from Bloomberg Intelligence in mid-October, "Corrugated Packaging: 3Q/4Q Market and Demand Update," Ryan Fox, corrugated market analyst, and Doug Larsen, paper packaging pricing analyst, examined the supply and demand dynamics of the containerboard market as the industry looks to work around the destroyed infrastructure.

Fox said Hurricane Helene and Hurricane Milton, storms that ravaged the southeastern U.S. in late September and mid-October, are inhibiting the supply of paper. The Southeast has 30-plus mills, Fox said, and up to 60 percent of them rely on the rail system to

transport their rolls, while the rest typically use trucks.

"While we haven't heard of any mills that have sustained any damage directly, the infrastructure surrounding them is what's been impacted," he said. "Any of the infrastructure around western North Carolina, eastern Tennessee, northern Georgia, we expect there to be delays ... [and] work-arounds as people try to get material from those mills in the Southeast to where it needs to go."

However, Fox said this could create opportunities in the export market.

"We've seen exports decline, at least in September—they were almost a third of what they were earlier in the year as people were gearing up for the fact that there was going to be a strike [at the ports] and it would impede the flow of exported paper," he said. "So, there's probably a little bit of paper floating around in inventory that could be rerouted."

“
Any of the infrastructure around western North Carolina, eastern Tennessee, northern Georgia, we expect there to be delays ... as people try to get material from those mills in the Southeast to where it needs to go.”

— Ryan Fox, corrugated market analyst, Bloomberg Intelligence

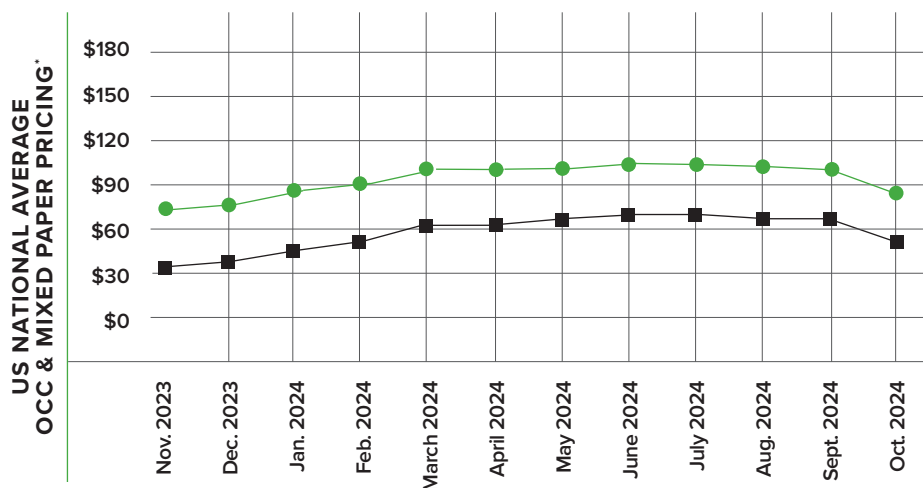
Corrugated medium is in short supply, Fox said, noting that he hears "pretty often" from industry participants that supply is tight.

"And, unfortunately, there were several medium mills in the Southeast that will be affected with the logistics and getting that product out, so we do think that's going to put some pressure on producers as they manage their inventory," he continued.

One of the grades imported most into the U.S. is white linerboard. Regarding the strike of the International Longshoremen's Association at East and Gulf coast ports in the U.S., which ended Oct. 3, Fox said "they didn't miss too many beats" as most every port impacted was back up and running shortly after.

From an overall supply standpoint, Fox expected some "hints of tightness" throughout October as the industry figures out how to get paper from mills to box plants.

For a demo of Fastmarkets RISI's PPI Pulp & Paper Week pricing, please visit www.fastmarkets.com/thanks-for-your-interest-in-a-demo-of-our-portal.



● OCC ■ Mixed Paper (54); Average U.S. dollars per short ton for open market purchases by mills for delivery in September as reported by Fastmarkets RISI's PPI Pulp & Paper Week Sept. 5. Prices used with permission from PPI Pulp & Paper Week. Visit www.fastmarkets.com/thanks-for-your-interest-in-a-demo-of-our-portal for more information.

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On the containerboard demand side, Larsen said one of the success stories this year has been exports.

"Exports during this year have been up year over year, and that has helped increase the mill operating rate with box shipments [in the U.S.] still being flat," he said, adding that the most common way

he hears U.S. box demand described recently is "OK, but not great."

He said the best-case scenario in terms of box shipments in 2024 is a 1 percent improvement year over year. Bloomberg still stands by that projection, however, box shipments in the third quarter would have to grow

1.4 percent year over year and 0.6 percent sequentially just to reach the third-quarter average since 1994.

"For perspective, a 1.4 percent bump would mark the biggest year-over-year quarterly gain since the second quarter of 2021," Larsen said.

But for the fourth quarter, he said, industry contacts are indicating stronger demand sentiment and there could be as much as a 2.2 percent growth year over year, but several headwinds make that challenging.

"If you just look at history, the fourth quarter is rarely higher than the third quarter," Larsen said.

Export	Destination	New York	LA	SF/Oakland
Mixed (54)	Asia	89-92	92-95	87-90
OCC (11)	Asia	142-145	152-155	147-150
SRPN (56)	Asia	99-102	102-105	92-95
SOP (37)	Asia	202-205	212-215	202-205

Domestic	New England	New York	Buffalo	Midwest (Chicago)	Southeast	Southwest	Los Angeles	San Francisco	Pacific Northwest
Mixed (54)	50-55	50-55	50-55	65-70	60-65	60-65	45-50	40-45	40-45
OCC (11)	85-90	85-90	85-90	90-100	90-100	100-110	70-75	50-55	60-65
SRPN (56)	75-80	75-80	75-80	80-85	70-75	75-80	60-65	50-55	45-50
SOP (37)		115-125		110-120	115-125	125-135	155-165		90-95

U.S. dollars per ton for open market purchases by mills. Domestic prices are FOB seller's dock for delivery in October as reported by Fastmarkets RISI's PPI Pulp & Paper Week Oct. 5, while export prices are FAS port of origin. New York includes ports in northern New Jersey and LA includes Long Beach and LA ports. Prices used with permission from PPI Pulp & Paper Week, www.risinfo.com/ss0.

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DOMESTIC MARKET CONSIDERED ‘MIXED’

RECENT REPORTS FROM BOARD MEMBERS OF THE PLASTICS DIVISION of the Brussels-based Bureau of International Recycling (BIR) describe a “mixed” U.S. market for recycled resins.

Board member Sally Houghton of The Plastics Recycling Corp. of California writes that while polyethylene terephthalate (PET) and mixed-color high-density polyethylene (HDPE) are facing significant headwinds, materials such as natural HDPE have been stable or seen a rise in demand.

Regarding recycled PET, Houghton writes that the market has been grappling with supply shortages and unusually high prices for the summer season, creating pressure on reclaimers to meet demand.

“Winter is expected to exacerbate these issues as consumption of soft drinks stops, leading to further price increases for bales,” she says.

Mixed-color HDPE bale pricing remained low throughout the summer, with

one Midwest-based recycler saying it “hit a floor” of about 10 cents per pound in August.

Houghton reports the same domestic bale price, adding that buyers have been limiting purchasing to contracted volumes, while excess supply goes to export markets.

However, demand for natural HDPE has increased, Houghton says, with bale prices rising from 32 cents per pound to 41 cents.

More broadly, the economic environment, which includes inflation, high interest rates and a slow recovery, is contributing to caution surrounding large-volume purchasing, Houghton says.

“The next few months will be pivotal, particularly with factors like the upcoming U.S. elections and the recent change in federal interest rates influencing market confidence,” she adds.

Weakened demand for some resins hasn’t only been an issue in the U.S. In his BIR report, board member Xavier Lhoir of Belgium-based

“**The next few months will be pivotal, particularly with factors like the upcoming U.S. elections and the recent change in federal interest rates influencing market confidence.**”

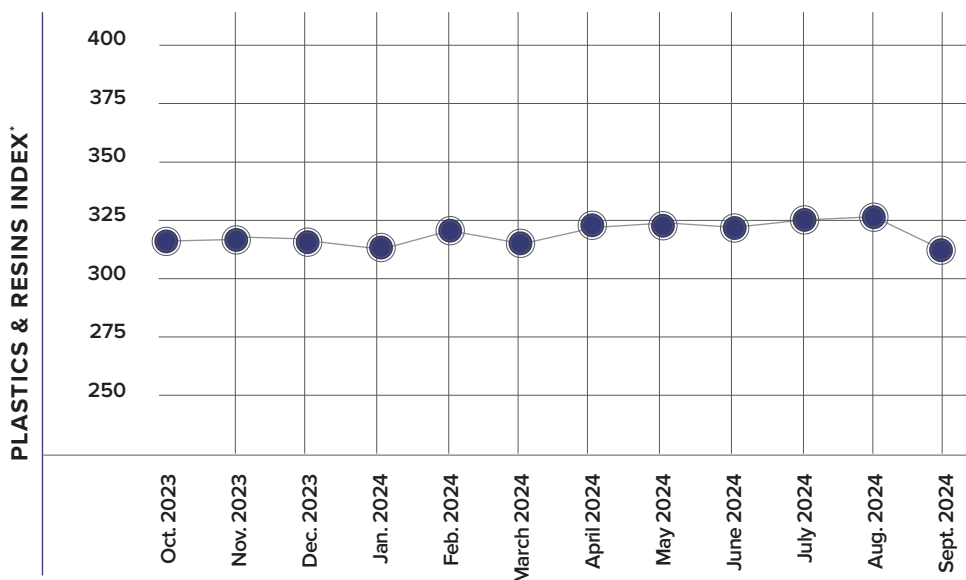
– Sally Houghton, The Plastic Recycling Corp. of California

Valipac writes that virgin and recycled plastics prices have not moved much for that reason, adding that markets didn’t improve over the summer.

“Further price reductions to entice buyers are not expected as recyclers’ margins are at a historical low,” Lhoir says. “Many are merely surviving because of stable prices as increases are very unlikely in October.”

Plastics Division President Henk Alsema of Netherlands-based Vita Plastics says recyclers across Europe are facing difficulties from low margins and poor sales with manufacturers struggling.

“Demand for recycled materials remains under pressure, and those who hoped for a recovery after the summer break have been disappointed,” he says. “Even worse, it seems the market may deteriorate further as we head towards the end of the year. Prices, margins and sales are under immense pressure, sentiment is poor and the tonnages currently being traded are low.”



*Producer price index is based on December 1980 average prices as 100; source: U.S. Bureau of Labor Statistics

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Chad Smith

The end of density problems with twin-shaft shredders

The THOR-6363-K hammermill is the smallest of the THOR series, but don't let that fool you. It has been engineered to solve the problem that many scrap yards around the U.S. and the world have with pre-shredder scrap: lack of density and cleanliness.

Chad Smith has been running his scrap yard for 13 years in Jena, Louisiana. He, like many others, operates a family-owned recycling business, which is in its second generation. The company processes around 1,000 metric tons per month consisting of various types of scrap.

Chad has gone through a natural process during his years leading the business, including facing the realization that he needed to add value to the material in his yard. This prompted him to invest in equipment. Among the numerous options in the market, he decided to acquire a twin-shaft shredder. In the beginning, he could process material to add some value to his product; but, he soon realized it was not the most effective way to do it.

After trying to upgrade his light steel scrap using a twin-shaft shredder for about three years, he concluded that the output material didn't reach market premium standards with respect to cleanliness and density.

"We were getting a lot of pushback from the mills. They were quite reluctant to purchase the material processed by the twin-shaft," he remarks.

Facing this situation, Chad needed to find a solution tailored to a company of his size that would allow him to upgrade his pre-shredded material. "I researched a lot online and, after watching all the THOR videos on YouTube, I was sure that I needed to reach out to ZB Group."

ZB Group is a Spain-based equipment maker with more than 40 years of experience designing and manufacturing crushing and shredding equipment. It was the first company to design and manufacture a mobile hammermill shredder, introducing the first unit into the North American market in 2013.

Chad contacted ZB Group, which also is a family-owned and -operated business, for more information. From the beginning, communicating with and understanding the ZB Group's team was easy and fluent, with both firms being on the same page. "As soon as you start talking with them, you realize they are an honest company willing to help you from the beginning," Chad says.

"Making the jump to a hammermill was a scary leap for us; these are significant investments for an owner-operator," he continues. "But, it has been a game-changer for us. Productivity and density have gone up, wear and tear in the twin-shaft has gone down, and we are getting a significant premium from the market as we are able to market our material as shred rather than HMS [heavy melting steel]. And, most significant of all, we are now able to recover the nonferrous metals, and that is the true goal of shredding, isn't it?"

Chad explains, "Once you see how quick the return on the investment is and the amount of money you

were giving away before, you regret not making this move earlier."

Based on his previous experiences with overseas manufacturers, Chad said he originally had serious concerns about the level of after-sale service he was going to get. "Who doesn't have or know of someone that has had a nightmarish service experience with an overseas company?" he asks.

However, given that ZB Group has a spare parts warehouse and service team housed in Atlanta, GA, and the feedback he got from existing customers, that concern was all but gone. "Having a local service team and spare parts stock was key for us," Chad says. "And our experience so far has been great. Both service teams, the one in ZB Group's headquarters and the one in Atlanta, are very involved and have responded to our questions in a timely manner."

"Now that I'm doing it, the thing that has surprised me the most is that I didn't think I would be able to get into shredding with my size," Chad says. "We are conditioned to think that in order to get into the shredding business, you have to have thousands of tons and \$20 million to \$30 million to invest. The units that ZB produces make a beautiful product that the mills love and at a fraction of the investment."

"For a little bit over \$1 million, the THOR-6363-K is a cost-effective and accessible way for small and medium yards like ours to bridge the gap between the 'pre-shredded' material produced by the twin-shaft shredders and the shredded ferrous scrap that steel mills seek."

The THOR-6363-K hammermill has allowed Chad's company to process more than 20 gross tons per hour of pre-shredded material to achieve densities of nearly 70 pounds per square foot.

"We decided to go with smaller grates to get a premium density and better liberation when processing iron-aluminum," he says. Now, his company finally can efficiently and quickly convert and ship the material the company has.

"I would recommend others in similar situations to contact ZB Group," Chad concludes based on his experience. "It is the smart option if you are processing HMS through your twin-shaft and you are not getting the finished product you and your customers want."



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THE OWL'S HEAD ADVANTAGE

Owl's Head Alloys has leveraged its reputation for customer service and quality products to open a second location in Mississippi that will serve Aluminum Dynamics LLC and other customers.

BY DEANNE TOTO

OWL'S HEAD ALLOYS AT A GLANCE

LEADERSHIP: Chairman David Bradford, President Michael Boyle, Chief Financial Officer Travis Jones, Executive Vice President/Plant Manager Wayne Wallace, Chief Commercial Officer Steve Daugherty and Vice President of Engineering & Maintenance Neal Booker

LOCATION: Headquarters and plant in Bowling Green, Kentucky, with a second plant opening soon in West Point, Mississippi, and a landfill for salt cake residue located outside of Morgantown, Kentucky

NO. OF EMPLOYEES: 160

EQUIPMENT: The Bowling Green plant is equipped with a shredder with an air knife and an eddy current separator downstream, five rotary barrel furnaces, an ingot line and a robot that helps with stacking and bundling ingots. The plant in West Point started installing its first rotary furnace late this summer.

SERVICES: Toll processing of aluminum scrap and dross to produce aluminum alloys in ingot, sow or molten form



Michael Boyle,
president of
Owl's Head Alloys



Beginning in 2002, Owl's Head Alloys (OHA) has melted aluminum scrap in its hometown of Bowling Green, Kentucky.

While the company's business model has changed over the last two decades, its role as a secondary aluminum alloy producer has not. However, it has garnered OHA more attention in recent years as the aluminum value chain looks to reduce its carbon footprint.

OHA Executive Vice President and Plant Manager Wayne Wallace describes the company as being integral and necessary to the aluminum sector as it looks to decarbonize by increasing the recycled content in its products.

"What we do is we recycle, and we melt all the stuff that's just very difficult to melt at traditional rolling mills or die casters, plus other places, and that is a good formula for us," he says.

EVOLVING THE BUSINESS MODEL

OHA provides tolling services to its customers, which company President

Michael Boyle says means it doesn't compete against them to purchase scrap. Its focus on customer service and the higher recovery rates it delivers help to differentiate OHA from its competitors.

"We continue to work on that every day," Boyle adds.

Prior to establishing OHA, founder and Chairman David Bradford owned a scrapyards in Bowling Green, but his ultimate objective was to melt metal, so he established OHA, installing its first furnace in September 2002.

At that time, OHA employed roughly a dozen people at its 32-acre site in Kentucky, and Boyle says the company still has three of those original people on the payroll today.

In its early days, OHA bought scrap and produced remelt secondary ingot, or RSI, that it marketed to the aluminum industry. As the business continued to grow, the company added its second and third furnaces in 2005 and 2010, respectively.

OHA moved to a tolling business model late last decade, serving customers in the automotive, construction, aerospace and packaging industries, among others.

"We're 100 percent tolling," Boyle says. "We do not buy scrap. A lot of our business is with industrial accounts, be it somebody that's melting metal for rolling slab, die casting [or] extrusion billet. We can sit across the table and tell those folks that we don't compete against them in the scrap market."

OHA added a shredder in 2005, enabling it to process aluminum scrap more efficiently. The shredder's downstream has been expanded over the years, with the addition of an air knife in 2007 and an eddy current separator in February 2012,

further streamlining recycling processes and enhancing OHA's overall efficiency.

The company's most recent capacity expansions in Bowling Green were in October 2018 and August 2022, when it added its fourth and fifth furnaces.

MEETING THE INDUSTRY'S GROWING NEEDS

OHA is preparing to open its second location, located in West Point, Mississippi, having won the bid to supply Aluminum Dynamics LLC (ADL), a division of Fort Wayne, Indiana-based electric arc furnace steelmaker Steel Dynamics Inc. OHA is investing \$29.25 million in the project, which is expected to create 68 new jobs over the next three years.

Boyle says OHA was one of four companies to bid on the project to support the recycled-content aluminum flat-roll mill ADL is constructing in Columbus, Mississippi, by processing scrap as well as dross

from the plant. Since OHA was awarded the contract in late 2023, it has purchased an existing 195,000-square-foot facility on 48 acres in West Point, roughly 20 miles from ADL.

The Mississippi Development Authority has provided OHA with assistance for building improvements, while the city of West Point and Clay County are providing local tax abatement assistance.

The first rotary furnace is being installed, Boyle says, with operations scheduled to begin in early December.

"We're working on the electrical components and we're waiting for a new 4-inch gas line to come into the facility," he says as of early September. "That's a critical part of getting this thing up and running at this point."

ADL will not be the only client OHA serves out of its new West Point site, Wallace says, equating ADL to an anchor tenant in a mall.

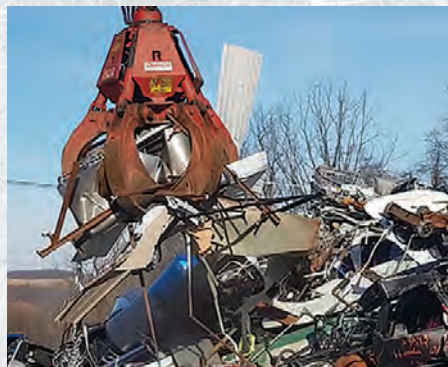


"The Aluminum Dynamics contract is the cornerstone that gets this facility started and up and running," Boyle adds. "We look at the market in the Gulf Coast area and we think that it's underserved, if you will, right now. We think that there is room for this asset to grow market share down there pretty quickly."

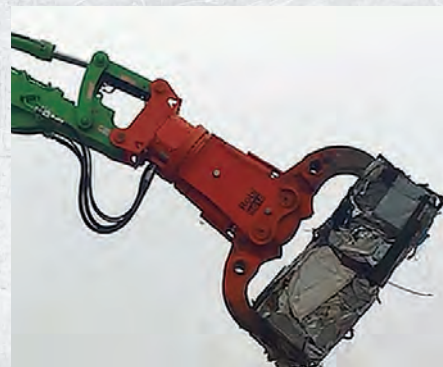
He says the investment OHA is making in Mississippi will enable the production of low-carbon aluminum throughout the region. In terms of carbon dioxide emissions, secondary aluminum production results in half a ton for every ton of

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metal produced, while primary aluminum smelting results in about 8 tons of CO₂ per ton of metal produced, according to the Aluminum Association.

“We think we’re significantly below that half a ton and looking at where we can continue to reduce OHA’s CO₂ footprint,” Boyle says.

Changing the industry longer term by using a hydrogen-based fuel source rather than natural gas, Boyle says, will take time.

“The two things that stand in the way of that are being able to get deliveries of that kind of product right now in North America—it’s just not there—and then the cost of hydrogen being two to as much as three times higher than natural gas,” he continues. “That’s a pretty big hurdle to overcome.”

In the meantime, OHA is leveraging what it considers to be its advantages to differentiate itself from other recycled-content aluminum producers.

PRIORITIZING QUALITY, CUSTOMER SATISFACTION

When OHA won the ADL bid, Bernardo Bulnes, melt, cast and raw materials coordinator at ADL, said, “Aluminum Dynamics received numerous bids from the industry, but Owl’s Head Alloys stood out as the leader in the secondary aluminum processing industry due to its exceptional quality and customer service.”

“Customer service is what we pride ourselves on,” Wallace says, adding that OHA prioritizes transparency. That extends to admitting when it messes up a melt. “We don’t do that often, but if we’re ever selling something [directly], it’s just because we messed it up; we had to make the customer whole.”

He refers to what he calls “the Owl’s Head advantage,” which includes the company’s flux blend, a proprietary mixture of its salt flux used to treat molten aluminum to improve the quality of the final product.

Wallace says the company also is easy to do business with, which he knows firsthand having worked for companies that used OHA’s services in the past.

The company is ISO 9001:2015 certified for quality management and says it is committed to constantly achieving customer satisfaction for inventory accuracy, recovery quality, chemistry quality and customer service. OHA says it achieves customer satisfaction by focusing on its customers’ needs, continuous improvement, employee empowerment and teamwork. OHA also achieved ISO 450001 and ISO 140001 certifications in 2024.

“One of the things that we think we do very well here is customer segregation,” Wallace says.

The company dedicates an area to each customer’s material. When customers visit, they notice the way their material is segregated, which builds their trust by assuring them other material will not be

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mixed in with their and ensuring a good yield from their scrap.

“It makes it easier for them or their banks to come in and audit as well,” Boyle adds.

He says OHA spends time preparing a customer’s scrap, which involves shredding and blending it, and notes customers may send in four or five items, “depending on what we’re making for them.”

Another differentiator for OHA is its workforce, Wallace says.

“They get the job done [and] they follow the process,” he continues. “They are focused on doing the right thing—safety-wise, environmentalwise—with our customer being the single focus for everybody throughout the organization.”

OHA’s employee buy-in is achieved in part through its employee ownership. The company became employee-owned in 2019 with the establishment of an ESOP, or employee stock ownership plan.

“You have to work 1,000 hours and you become a shareholder in the company,” Boyle explains.

The OHA leadership team is working hard to ensure the company’s customer-focused culture is instilled at its Mississippi site. “That will lead to our continued success,” Boyle says.

To facilitate that, he says, OHA has relocated a few people who are “entrenched” in the company’s culture to the Mississippi site, and the OHA leadership team will be on-site often.

The Mississippi workforce appears to be eager to welcome the company. OHA is hiring 23 people initially and has received more than 550 applications, Wallace says.

“We really feel close to West Point,” Boyle adds. “They have accepted us with open arms, and they’re hungry for the jobs, and we’re excited about becoming citizens of their lovely town and good stewards to their community.”



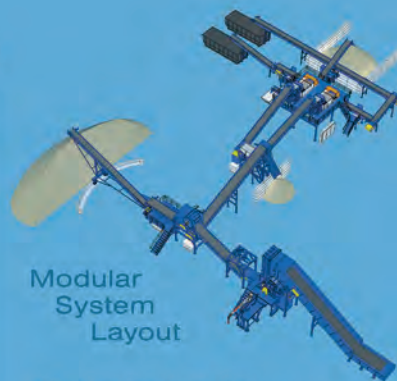
Regardless of location, he says, OHA does not melt a single pound “without every consideration for safety, recovery [and] quality,” adding, “If you do all that, the pounds come naturally.”

“We’re trying to make sure we have the right people on the bus in Bowling Green, whether they’re here or they’re in West Point, Mississippi,” Boyle adds. “We’ll get them in the right seat as time goes on, but you’ve got to get the right people in there to drive the culture, and I believe that we’re off to a good start.”

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Boyle says OHA can handle “dirtier” post-consumer scrap, with roughly 65 percent of the aluminum it handles being wrought alloys, while 35 percent is foundry alloys.

OHA serves 30 to 40 customers per month in Bowling Green.

He says OHA’s location in Kentucky, known as the aluminum corridor, positions it well to service customers.

“We have several large rolling mills that we are actively involved in supporting,” he continues. “We have some billet plants and some standalone slab casting plants that are doing billet and rolling slab, so there are quite a variety of customers on that side of the business. There are a lot of die casters in the region, and we’re actively involved with several of those customers as well. We cover the gamut from aerospace to used beverage cans to the large and small die casters making car parts, gas meters or lawn mower parts,



anything you can make out of aluminum.”

Wallace says 2023 was a transformative year for OHA as it journeyed through multiple avenues of growth.

“OHA continues to carry a growth mindset with an exciting future, such as the new location in Mississippi and the potential of growth in Kentucky that would have in consideration more furnaces or shredding and sorting,” he says. “This growth dovetails perfectly for our customers and our employee-owners.”

In addition to expanding the number

of furnaces the company operates in Mississippi, OHA has room for another furnace in Kentucky and is looking into upgrading its shredder and downstream sorting capabilities, Boyle says.

“If we were to make the investment, we would probably be looking at putting in a new shredder that would help us clean the material even more than we do today for used beverage cans, or UBCs, as well as being able to open up the different types of material we could put through that shredder,” he continues.

With the growth OHA has experienced over the last two decades and the volume of scrap it’s processing for its customers, he’s certain more opportunities will be presented. “We just have to make the right choices and the right decisions.” **RT**

The author is editorial director of the Recycling Today Media Group and can be reached at dtoto@gie.net.

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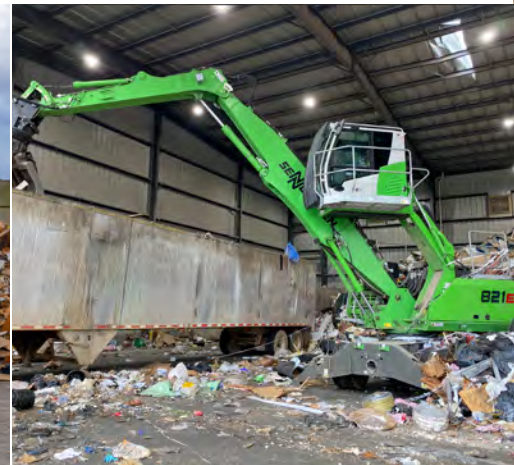
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DAY *by* DAY

Uncertainty continues to weigh on nickel and stainless steel scrap markets, with changeability being the norm.

BY DEANNE TOTO

KEY TAKEAWAYS

- + London Metal Exchange nickel prices benefitted from the Federal Reserve's interest rate cut in September and news of China's monetary stimulus plans, but low demand for stainless, particularly in Europe, will make these higher prices less palatable to stainless steel mills.
- + Nickel pig iron and not prime nickel could determine stainless steel scrap pricing going forward as Asia now dominates production of stainless steel.
- + Recycled content will continue to factor into stainless steel production in North America and Europe as mills strive to achieve carbon neutrality by 2030.

It's been over two-and-a-half years since the London Metal Exchange (LME) suspended nickel trading and canceled trades March 8, 2022, in response to what LME CEO Matthew Chamberlain described as "unprecedented overnight increases in the three-month nickel price."

Trading on the LME nickel contract restarted March 16, 2022, with 15 percent daily upper and lower price limits, which became permanent in April 2023.

Speaking to those in attendance at the Bureau of International Recycling (BIR) Stainless Steel & Special Alloys Committee at the end of May, Alberto Xodo, an LME product specialist for steel and nickel, said liquidity had returned to the contract and open interest was rising, with the first several months of this year seeing contract activity nearing March 2022 levels. Following an earlier disconnect in the wake of the suspension, Xodo said convergence had been restored between prices on the LME and the Shanghai Futures Exchange.

BIR Stainless Steel & Special Alloys

Closing a gap in RED METAL SEPARATION

STEINERT CHUTEC takes small nonferrous fractions and separates them into valuable products.

Multiple options exist when creating valuable products out of nonferrous fines. But in the view of Kyle Rice, Midwest Territory Manager at Walton, Kentucky-based STEINERT U.S. Inc., recyclers often have stopped at recovering zorba.

"Historically, zorba was the end-all product, and that would be exported," Rice says. "That shifted with some additional X-ray equipment: X-ray transmission and X-ray fluorescence."

Introduced three-and-a-half years ago, STEINERT CHUTEC is designed to close gaps in sorting the fines resulting from heavy metals liberation and add value by recovering red metals, such as copper and brass, and zinc, that often have been exported. Using X-ray fluorescence and a 3-dimensional sensor, the machine captures and separates desired metals as they cascade down a chute.

STEINERT CHUTEC is designed for the present as well as the future as onshoring of production capacity for red metals increases.

"The response to STEINERT CHUTEC has been very good," Rice says. "It's been very popular both internationally and in the domestic U.S. market where people are moving ahead and putting these in. A lot of people who already had these mixed-heavy-metals products and were having to export them now have an option to further separate them with STEINERT CHUTEC. You see a lot of onshoring of production capacity for metals like copper and brass, and these machines are going to be a part of filling that production demand for postconsumer scrap."

"In terms of being able to address all size fractions and separate them to the quality of products that you're going to need to feed into the domestic processing locations, STEINERT CHUTEC is going to be there for the long haul," he adds.

The machine, developed by Germany-based STEINERT, is designed to accommodate metals ranging from 5 millimeters to 30 millimeters in size, although much larger fractions are also being processed. Scrap is fed into a vibratory feeder housed inside a shell that also contains a chute. As material falls off the feeder, it slides down the



chute and passes an X-ray sensor. Air valves arranged on a bar shoot jets of air at the desired metal fractions and eject them into a splitter, separating them from the rest of the scrap.

Operators can use STEINERT CHUTEC's computer to program which metals to detect.

"We're making the detection of the object itself, and then it's making a quick millisecond decision on what it's able to detect from that piece," Rice says. "If it's a copper piece and you're trying to sort out copper, STEINERT CHUTEC hits it with the air jet to push it past a splitter. It's all happening instantaneously out of freefall that it's detecting what the composition of that piece is and making a quick decision."

Why focus on the fines fraction when separating heavy metals? Steinert estimated there was added value in being able to detect more red metal content such as copper and brass, as well as concentrate precious metal content along with it. For that reason, STEINERT CHUTEC was designed with the highest detection resolution on the market to help separate red metal units specifically out of a fines fraction that historically has not been processed to the fullest extent of its value.

"Overall, at Steinert, we look to be a comprehensive solutions provider, and STEINERT CHUTEC was born to address the gap in fines heavy metals separation," Rice says.

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Committee Chair Joost van Kleef of Netherlands-based Oryx Stainless BV agreed that signs pointed to “a return to normality” on the LME nickel contract.

While normalcy may have returned to the LME nickel contract, uncertainty and volatility remain, clouding the metal’s near-term outlook and that of stainless steel and other nickel-based alloy scrap.

CERTAIN VOLATILITY

California-based Spectrum Alloys LLC’s Doug Kramer, writing in the October “BIR World Mirror on Stainless Steel & Special Alloys” quarterly report, says, “Market conditions for U.S. recyclers of stainless steel and specialty alloys continue to change significantly from week to week.”

Concerns include uncertainty regarding the U.S. elections in November and future interest rate changes, he says, noting both will have “significant implications” for business investment. However,

the Federal Reserve’s half-point rate cut in September and China’s plans to introduce additional monetary stimulus supported market sentiment and commodity prices.

Also writing in the October “BIR World Mirror,” van Kleef notes LME nickel prices increased significantly in the weeks following this news.

“However, an increase in raw material pricing will have a further negative impact on production of stainless steel as the market is not ready to digest any price increase at this stage owing to the low level of demand,” he adds.

Rosie Hill of Ireland Alloys Ltd. in Great Britain writes in the “BIR World Mirror” that LME nickel prices remained volatile throughout the third quarter, fluctuating between \$16,600 per metric ton and reaching \$18,200 in October, the start of the fourth quarter.

“While early optimism from the aerospace sector and electric vehicle (EV)

battery demand provided some price support, growing inventories and a persistent low-grade nickel surplus weighed on the market,” Hill adds.

PRODUCTION AND CONSUMPTION

The International Nickel Study Group (INSG), Lisbon, which met Sept. 23-24, says the rate of growth for nickel use in EV batteries has been lower than expected as it has been negatively affected by the increased relative use of batteries that do not contain nickel, mainly lithium iron phosphate, and a recent surge in demand for plug-in hybrid vehicles rather than battery EVs.

However, the INSG says new ternary precursor cathode active material projects likely will start production in the short term, supporting expanded use of nickel.

Hill agrees that long-term forecasts for nickel remain optimistic, “with demand

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from electric vehicles and renewable energy expected to drive a shift from surplus to deficit by 2028.”

She says the superalloy market has remained strong, particularly in aerospace, defense and oil/gas.

“Demand for INCO 718 and IN625 has continued to be strong, although Boeing’s production delays have pushed aircraft material purchases into 2025,” Hill continues. “The oil and gas sector has seen increased superalloy demand, fueled by higher energy prices and new exploration projects, especially in harsh environments requiring high-performance alloys.”

World primary nickel production was 3.36 million metric tons in 2023, according to the INSG, and is forecast to reach 3.52 million metric tons this year and 3.65 million metric tons in 2025, not adjusted for possible production disruptions. World primary nickel use was 3.19 million metric tons in 2023, and the INSG

forecasts an increase to 3.35 million metric tons this year and to 3.51 million metric tons in 2025, therefore, implied surpluses total 167,000 metric tons for 2023, 170,000 metric tons for 2024 and 135,000 metric tons for 2025.

The INSG also observes that different types of nickel products, including nickel pig iron (NPI), mixed hydroxide precipitate from high-pressure acid leaching plants, nickel matte converted from NPI, full plate nickel cathode and nickel sulfate, will continue to ramp up production this year and next in Indonesia.

In comments from Oryx dated Oct. 8, the company notes nickel is an important driver of Indonesia’s economic development, though some question the sustainability of its nickel production, which involves using coal energy and less stringent environmental standards.

“When talking about the Indonesian nickel sector, the focus is often on the

associated environmental problems, and rightly so,” Oryx writes. “However, the discussion must also include and acknowledge the efforts and gradual improvements the country is making in the right direction. Ultimately, the goal is to ensure continued economic growth, while at the same time not losing focus on the improvement of the environmental situation, social standards and compliance.”

The company adds that Indonesia also intends to increase its domestic nickel value chain, noting that Hyundai and LG Energy Solution opened Indonesia’s first battery factory in July, which Oryx says has the additional distinction of being “a symbolic departure from the high dependence on Chinese companies as the country is also looking for other partners in the metallurgy, manufacturing and refining sectors.”

In China, despite a decrease in NPI production, the INSG says primary



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nickel output is forecast to increase, driven by additional nickel cathode and nickel sulfate production.

The INSG expects growth in the stainless steel sector in 2024 and 2025, especially in China and Indonesia.

The Brussels-based World Stainless

Association (formerly the International Stainless Steel Forum, or ISSF) released figures for the first three months of 2024 showing that stainless steel melt shop production increased by 5.5 percent year over year to 14.6 million metric tons.

Recycled content will continue to

factor into stainless steel production in North America and Europe going forward as mills strive to achieve carbon neutrality by 2030, said Davin Blumenstock, Midwest vice president for Aliquippa, Pennsylvania-based Cronimet Corp. The company processes stainless steel scrap used in 304 and 316 melt programs, including 400 series stainless scrap, as well as nickel, chromium and molybdenum. The company's United Alloys and Metals division processes additional metals, such as nickel and cobalt superalloys and titanium alloys.

Blumenstock, who spoke at the Recycled Materials Association (ReMA) Roundtables in September, said carbon neutrality "is the future; there's no ignoring it."

Cronimet provides scrap and raw materials primarily to domestic mills. "While we do ship overseas, our focus is on the domestic business," he said.

Blumenstock noted that in 2000, the top four stainless steel producers were European firms, but as of 2023, those positions are now occupied by Asian firms.

"In 2000, these [European] mills were producing stainless from prime nickel and scrap and ferronickel," he said.

He added that China's 2015 introduction of NPI, a less expensive alternative to prime nickel and scrap, caused the shift in the companies that dominate production.

"It is really the antithesis of environmentally friendly," Blumenstock said of NPI-based stainless steel production in Asia. "It is the exact opposite of what ... the European market is trying to do, what the North American market is trying to do" to reach carbon neutrality.

EXPORT LANDSCAPE

Illustrating the changeability of the markets, Blumenstock said European demand for stainless steel scrap was "extremely strong" at the start of September and had all but dried up as the month progressed. He attributed the earlier aggressiveness on the part of European scrap buyers to the lack of availability of stainless steel scrap from Russia, limited availability of

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\$16,108.81

MAY 2024

\$19,511.56

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SEPT. 2023

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locally generated prime scrap from reduced production of consumer goods and the Marcegaglia Group's purchase of an electric furnace melt shop in Sheffield, U.K., that increased production and scrap demand in England.

Blumenstock said at the start of this century, stainless scrap was priced relative to prime nickel. "The market was 85 to 95 percent of prime nickel," he explained, whereas now "we're going to be pricing out scrap against the cost of the NPI. And I hope everybody understands that."

Kramer says India is the largest export destination for stainless scrap, though shipments have been slower this year.

"In the first seven months of 2024, U.S. exports of recycled stainless steel fell 30 percent to 212,000 [metric tons], with India accounting for 45 percent of the total," he writes in his "BIR World Mirror" market commentary. "Weaker demand for recycled stainless steel in Mexico and

Taiwan also contributed to the decline.

"Market participants also continue to express concerns about low-priced material from China and Indonesia displacing demand for U.S. recycled metal in key market segments."

The dockworker strike at East Coast and Gulf Coast ports further complicated the U.S. export situation.

A tentative deal was reached Oct. 3, and dockworkers represented by the International Longshoremen's Association (ILA) were called back to work. The agreement between the ILA and United States Maritime Alliance Ltd. extends the master contract until Jan. 15, 2025, with both parties returning to the bargaining table to negotiate outstanding issues, including using automation at the ports.

Transportation has presented challenges elsewhere, too.

"The persistent geopolitical tensions and transportation delays have affected

the movement of superalloy materials and nickel, although some improvement has been noted in the level of supply chain disruption," Hill says.

Muted prices for stainless scrap and market stagnation are likely to continue in the U.S. through year-end, Blumenstock predicted, unless lower interest rates spark changes in demand from the automotive, appliances or drilling sectors.

Longer term, Hill is optimistic.

"So, while this year's third quarter was marked by continued nickel market volatility and supply chain disruption, the long-term outlook for both nickel and superalloys remains positive, with demand from electric vehicles, renewable energy and aerospace expected to drive a market recovery," she says. **RT**

The author is editorial director of Recycling Today Media Group and can be reached at dtoto@gje.net.

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MASTERS OF REINVENTION

BY CHRIS VOLOSCHUK

Formerly an electronics recycler, Ecovery LLC has shifted its focus to processing aluminum and copper scrap on a global scale.

From left: Todd Borders, Brock Norris, John Paul Santangelo and Matt Haenszel of Ecovery's commercial team

Change can be hard, but that hasn't stopped Ecovery LLC and CEO Brock Norris.

The family-owned and -operated company got its start in 2008 as an electronic scrap recycler before reinventing itself into a global player in aluminum and copper processing, enjoying steady growth over 16 years from its 65-acre campus in Loxley, Alabama.

The company's campus houses multiple processing lines, fabrication and melt shops, with Ecovery recently opening an X-ray sorting plant for aluminum. In October, it commissioned a 60,000-pound-capacity secondary aluminum furnace—its second on-site—to meet the growing need for remelt scrap ingot (RSI), dross processing and aluminum tolling services.

In addition to its processing capabilities, Ecovery has a trading division that helps connect suppliers and consumers of various scrap metals across multiple continents. The company's proximity to Alabama's Port of Mobile, a 15-minute drive from its headquarters, has allowed for the large-scale growth

of physical material being imported to and exported from the Loxley campus. Also, Norris says Ecovery's positioning, adjacent to the intersection of two major highways, has made East-West and North-South domestic shipping easy for suppliers and consumers.

A fourth-generation entrepreneur whose roots trace back to 1931, when his family founded Assumption, Illinois-based John Deere farming equipment dealer Sloan Implement and diversified into manufacturing products such as chicken feeders, plastics and decking, Norris says his family's proven track record in manufacturing has helped inform Ecovery's shift.

"We've always run Ecovery with the mindset of adaptability to change where there is opportunity," Norris says. "Being an entrepreneur is not the easiest, that's for sure. Adjusting to changing markets and plans can definitely be scary, and there's plenty of risk, but there's calculated risk with that as well. And we've got a proven track record. ... I think the family

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expertise in manufacturing has been huge for us on the operations side of things, and that's really allowed us to scale this business."

MAKING TRANSITIONS

Ecovery began in 2008 as a seller of European scrap recycling equipment that also processed e-scrap using those same machines. Until 2013, the company regularly processed items such as computers, printers, fax machines, TVs and more sourced primarily from customers based in the Midwestern and southeastern U.S.

“

We anticipate demand and opportunities ahead, and we're going to want to be able to see those opportunities through. We've developed this campus with a focus on diversification, and our goal is to collaborate with and support our existing customers as well as the many domestic mills that are currently operational or will soon be.”

– Brock Norris,
CEO of Ecovery LLC

Seeing limited scalability and opportunity in the e-scrap market, the time came for a change in the business model. In 2013, Ecovery began to move away from processing e-scrap and started processing nonferrous metals, with aluminum copper radiators (ACRs) serving as the primary input.

“At that point in time, we had to figure out who we were going to be and how we were going to not only survive but thrive in this industry,” Norris says. “By 2014, we 100 percent got away from processing e-scrap and dedicated ourselves to processing ACRs, which were mostly all being exported overseas at the time.”

However, 2015 brought difficult scrap market conditions, and Ecovery chose to diversify the company's offerings from its two products, copper chops and aluminum shred, adding a melt shop to provide RSI to aluminum mills that were no longer eager to buy aluminum shred. The 20,000-square-foot plant was commissioned in 2016.

By 2017, Norris says the company's focus was to be one of the biggest ACR consumers in the U.S. and globally. “We were increasing our processing lines, increasing our capacity; we were able to really provide the forms and products mills wanted and needed,” he adds.

The plan was a success, and in 2019, Norris expanded Ecovery's commercial team while, for the first time, capitalizing on international markets with the help of the nearby Port of Mobile.

“Prior to 2019, we hadn't engaged in any international activities,” Norris says. “The Port of Mobile is only 15 minutes west of us and is a pathway to offer our products and services to Asia, Europe and South America. There were so many other markets that we could explore around the world. ... That was super pivotal to us because that gave us so many opportunities to geographically expand our supplier reach and diversify our consumers.”

However, in 2020, Norris noticed two issues of concern: Ecovery had scaled its business significantly over the years, but its focus was only on ACRs.

“That started becoming a little concerning to me for the sheer fact that when you're dealing with one input raw



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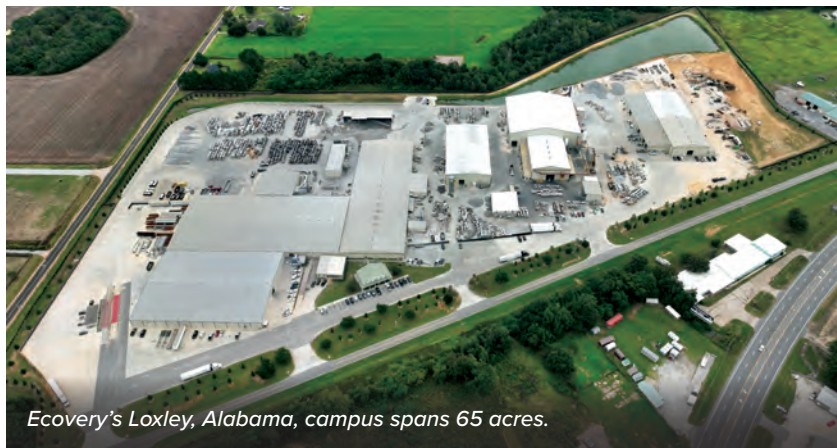
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metals consumer profile



Ecovey's Loxley, Alabama, campus spans 65 acres.

material and market conditions or supply and demand weaken, there could be some concerns or challenges," he says. Additionally, Ecovey saw a decrease in the yield of radiators because of original equipment manufacturer substitution. With copper rising on the terminal markets, the metal was a big cost factor for radiator manufacturers and engineers looking for ways to create them at lower input costs.

"We started seeing that aluminum copper radiators going into HVAC units were being replaced with aluminum radiators or lower-copper-content tubing," Norris says. "We wanted to really start thinking forward with how we would further reinvent this company, what the company would look like in 2024, 2028, 2030 and how we would continue to scale this campus."

By 2021, with a broad domestic and international footprint, Ecovey looked to help its suppliers and consumers find solutions for their scrap by establishing a trading division.

Earlier this year, the company commissioned its 25,000-square-foot aluminum X-ray plant, and in October it commissioned its second rotary furnace, which is housed in an additional 40,000-square-foot melt shop.

By 2026, Norris says Ecovey plans to add a third furnace.

CURRENT SCOPE

Using 400,000 square feet of processing space across its growing campus staffed by 125 team members, Ecovey now is able to take the variety of material it procures from around the world to produce a wide variety of aluminum and

copper products and alloys based on customer demand.

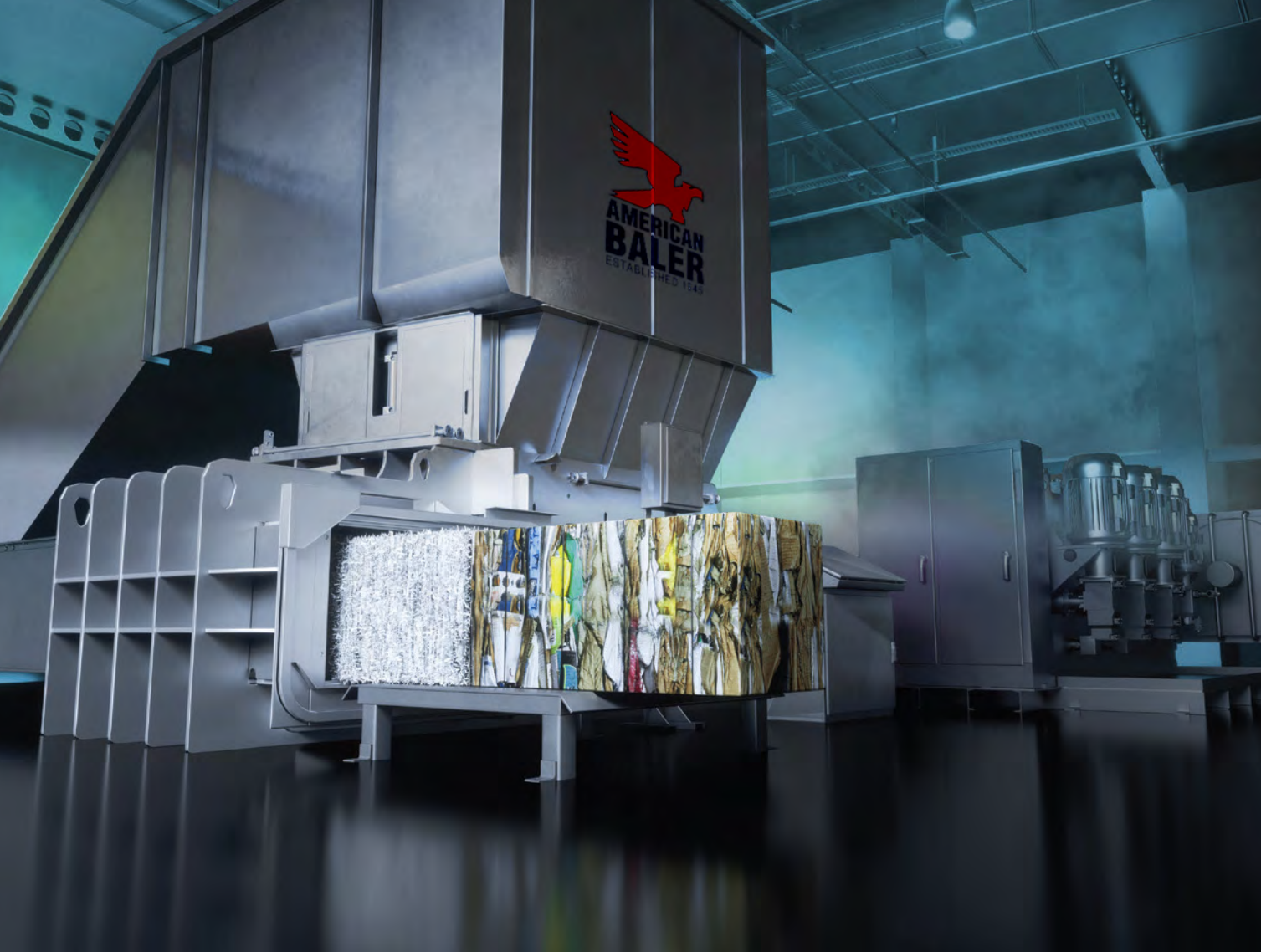
It provides products to a number of different sectors of the recycling industry, including No. 1 copper chops; 3000, 6000 and 2000/7000 aluminum shreds; deox 70 and deox 95 briquettes; aluminum pucks; and 1100, 3000 and 380 RSI. Materials the company purchases include clean and irony ACRs and radiator ends; clean and irony all-aluminum radiators; mixed and painted low-copper clips; painted aluminum siding; 1100-, 3000-, 5000- and 6000-grade scrap; used beverage containers (UBCs) and material recovery facility UBCs; white dross; zorba; and twitch, among others.

To perform its work, Ecovey uses an array of shredders, processing lines, X-ray technology, furnaces, pucking machines and briquette lines.

"That's some pretty cool technology, and it seems to continue to be growing on a regular basis," Norris says of the X-ray sorting plant, which is designed to supply furnace-ready aluminum shred to rolling mills in the Southeast and Midwest. "We've had some fun with that one. So far, so good."

Ecovey uses its fabrication shop as a research and development (R&D) hub, where it builds much of its own equipment, such as hammermills, granulators and conveyors, as well as fabricating its own processing lines.

"We have 15 team members at the fab shop not only consistently working on our equipment but continuously making process improvements to reduce downtime, costs and improve results of our products," Norris says. "It's truly R&D for us, which



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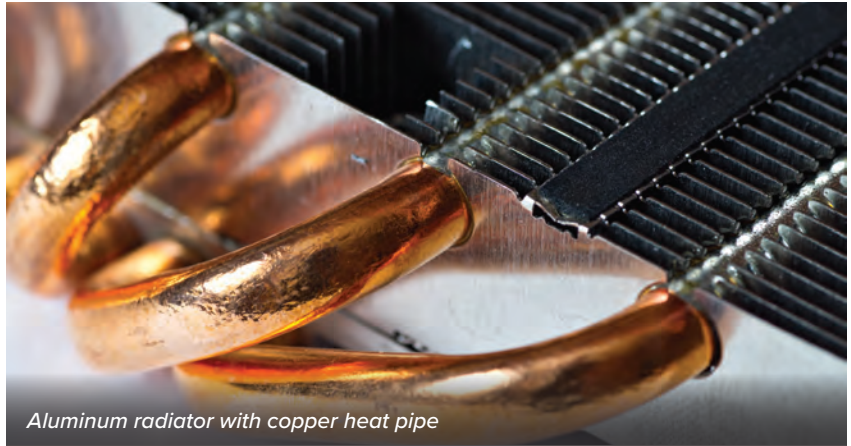
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we have found to be very beneficial.”

As a scrap metals importer and product exporter with customers in the U.S. and abroad, Ecovery also uses its own fleet of trucks, vans and chassis to help many of its materials reach their destinations.

With the commissioning of its new rotary furnace, the company will be able to increase its melting capacity and expand the dross processing and toll conversion services it can offer its customers.

Norris says the company’s diversification has come at a great time as new aluminum production capacity is set to come online in the U.S. For example, Atlanta-based aluminum manufacturer and recycler Novelis Inc. is constructing a rolling and recycling plant in Bay Minette, Alabama—about 20 minutes from Ecovery’s campus. Approximately four hours away from Ecovery’s location, in Columbus, Mississippi, Steel Dynamics Inc. is building its first recycled-content flat-rolled aluminum mill.

“We anticipate demand and opportunities ahead, and we’re going to want to be able to see those opportunities through,” Norris says. “We’ve developed this campus with a focus on diversification, and our goal is to collaborate with and support our existing customers as well as the many domestic mills that are currently operational or will soon be.”

FAMILY AND THE FUTURE

Ecovery’s structure is family-oriented. Norris’ uncle, Kevin Sloan, serves as chairman of the board; and his father, Walter Norris, manages its processing plant. Brock’s brother, Nathan Norris, is the company’s chief operating officer; and

his cousin, Ethan Sloan, manages the melt shop. His nieces and nephews also have entered the business in accounting and quality, health, environmental and safety roles at Ecovery.

“It’s really great,” Brock says of his family members’ involvement. “Everybody has their place, and everybody has their expertise, and we all respect that. We’ll have a common theme and common goal, and all the team members do, too.”

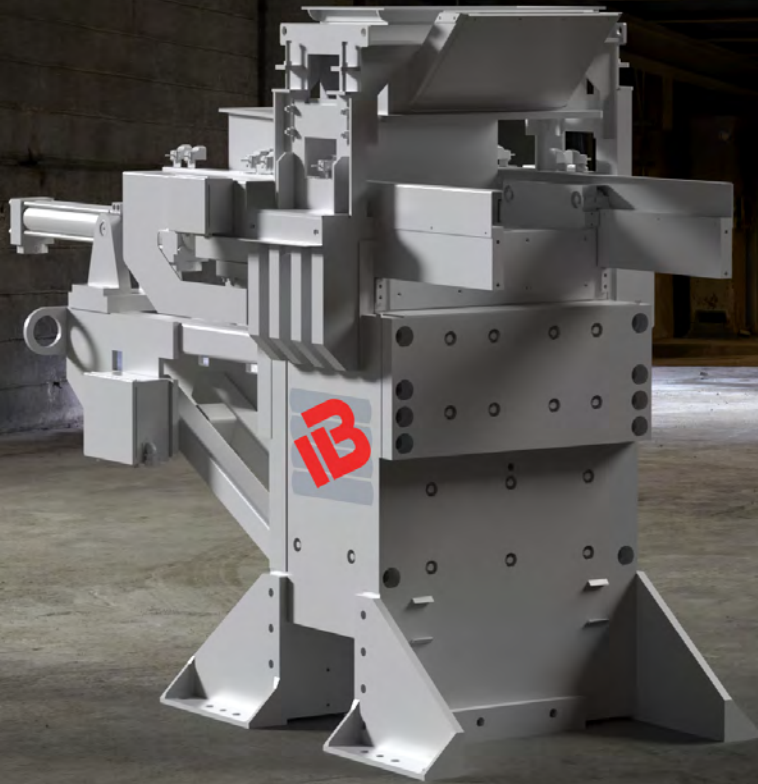
“It’s a small, family-owned business, and there’s quite a bit of family members [on staff]. But every single one of the people who works with us is on a mission to help grow this company, and we’re all in it together, which is pretty cool.”

Though Ecovery aims to install a third rotary furnace in 2026, its current plan is to focus on R&D and continue ramping up production in its newly commissioned furnace and X-ray plant.

To Norris, the company’s versatility and forward-thinking mindset, developed over years of reinvention, have helped set it apart in the industry.

“Our goal is to provide our customers with any shape or alloy they want,” he says. “We want to be supportive in the [customer] relationship and scale that relationship with the consumer so that we can supply them with recycled materials and provide a scrap/dross tolling service at the same time. A true partnership. We aspire to be a partner with the mills, supporting them as they scale their operations.” **RT**

The author is *Recycling Today’s* associate editor and can be contacted by email at cvoloschuk@gie.net.



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Five signs indicate it's time to replace your current conveyor.

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Companies aiming for optimization and efficiency likely are focused on balancing investments in new equipment while extracting value from their current equipment.

While walking this tightrope, it is important to be aware of when investing in your machinery is becoming a liability. When this happens, it could be the right time to replace aging machines with newer models.

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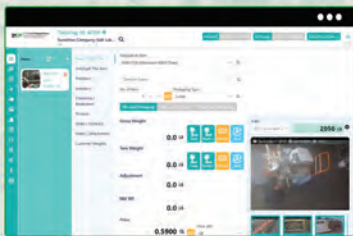
If operating an old conveyor, a replacement likely will not be a like-for-like swap but an upgrade from your facility's current model.

Photo courtesy of Fluent Conveyors



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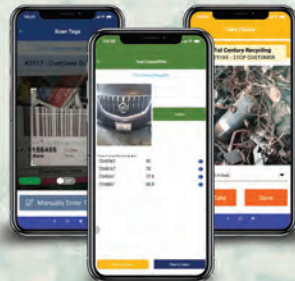
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Companies should watch for a number of signs when considering replacing an old conveyor system.

FREQUENT MALFUNCTIONS

As with all old machines, the longer a piece of equipment operates, the less effective it can become. In the conveyor space, that can become apparent when your machine malfunctions two or three times in only a few weeks or months.

You'll notice when the malfunctions are becoming more frequent—and you'll know then that it's time to invest in a new conveyor.

BETTER MODELS

If operating an old conveyor, a replacement likely will not be a like-for-like swap but an upgrade from your facility's current model.

This could mean that by taking the initiative to replace the old conveyor, you'll

find a new one that actually increases your operation's output and productivity.

BELT DEGRADATION

The belts that sit on conveyors are replaceable, and you likely have spent some cash replacing a worn and tired belt over the preceding months. Unfortunately, the wear and tear that happens to a belt often can be accelerated by an old and clunky machine long past its best days.

If you begin to see more frequent belt damage on your conveyor, this is another sign to replace the whole machine and not just the belt.

NEW FEATURES

Conveyors traditionally have performed a variety of functions, but they increasingly have become more diversified and altered to enhance their effectiveness.

If your production line has changed in recent years, you could find that an

entirely different model of conveyor will be far more effective in achieving your facility's business objectives.

INCREASED CAPACITY

A conveyor belt could become redundant or insufficient when you expand your facility. In this case, you could look to replace your current conveyor because it's not up to your standards. You could need a larger model, a more powerful belt or a longer machine.

With these tips, you should be able to identify when replacing your current conveyor with a more modern and efficient model is the best option. **RT**

Fluent Conveyors, headquartered in Denver, is a manufacturer of roller chain belt, drag chain belt, slider bed, trough idler and package handling conveyors. More information on the company is available at <https://fluentconveyors.com>.



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Sticking around

Strategies for retaining employees from A to Gen Z.

BY CARA SILLETTO, MBA, CSP

Nearly all organizations today struggle to hire and keep the employees they need to meet productivity and profitability goals. While some employers accuse younger generations of “not wanting to work,” I’ve spent the last decade diving into what employees of all ages do and do not want to stay with their employers.

First, different people have different priorities, with the primary values shifting from generation to generation. While Traditionalists (also known as the Silent Generation) born before 1945 valued stability so they could put food on their tables, the workforce has evolved dramatically, placing a higher value on mobility and opportunities to grow earning potential.

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So, what happened that caused this shift to what appears to be a more self-centered and entitled workforce?

Baby boomers (born between 1946 and 1964) simply wanted to provide a better life for their families and decided to work far more hours to grow their careers and businesses than the punch-clock Traditionalist employees.

The much smaller Generation X (born from 1965 to 1980) reporting to those boomers did what their bosses told them and stayed till the job got done. Why? Because their bosses told them to. Because Gen X employees didn't have the strength in numbers to push back on their boomer bosses, most realized early in their careers that to succeed, they had to play the "boomer game"—learning exactly how to show up at work and meet the unwritten expectations.

But the gigantic millennial generation (born from 1981 to 1997) and

Generation Z (those now under age 28) have pushed back, saying they refuse to work longer-than-necessary hours disguised as a "strong work ethic" because a company isn't staffed as it should be.

The younger generations saw boomers and Gen Xers in their families sacrifice home priorities to meet work expectations, then many got laid off in return for their hard work and dedication—my mom did (three times before I graduated high school). The new workforce is saying, "Staff appropriately, or we'll walk" because there's no guarantee an organization will take care of them long term.

This self-preservation focused on personal priorities over organizational priorities has hit many employers hard. But for those senior leaders who are willing to hear the new workforce out, a great employer/employee partnership can be found that benefits both parties in the end.

TWO TYPES OF EMPLOYEES

It's important to view your workforce today as two different types of employees. The first group is your "trees." These employees are deep-rooted in the organization as they've been with you awhile and are very dependable. Trees are able to weather the storms at work and make it through busy or difficult times. In fact, this group is not likely to go anywhere until retirement, even if you want them to, because they prefer stability and staying within their comfort zones.

The other group of employees is "houseplants." Therefore, when leaders begin to realize the new hires each have individual needs, much like houseplants, magic happens.

Higher-maintenance employees are like orchids, needing daily attention and more sunshine, or appreciation, on a regular basis, while lower-maintenance employees are like cacti and can be left

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GUIDANCE & SUPPORT

What the workforce of all ages needs today is the appropriate amount of guidance and support. For example, the “sink-or-swim” training model companies used for decades worked beautifully for Gen X employees because many previously had been latchkey children who were taught at a young age to fend for themselves after school and not “burn down the house.” They learned to solve problems, think critically and figure it out when they were faced with a challenge.

But because of the “stranger danger” parenting of millennials raised after the 1980s, when shows like “America’s Most Wanted” and “True Crime” hit the



airwaves, many children in this after-school-care generation didn’t have the opportunity to hone their critical thinking skills in the same way at a young age. That means employers must now plan to provide more guidance, training and onboarding for today’s new hires, especially

for Gen Z. If companies do not, those employees likely will become overwhelmed, not having the tools to cope in a stressful environment, and they’ll quit simply because you “threw them to the wolves.”

It’s a common assumption that younger employees don’t want to work, when

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we actually have found they simply want to be more properly guided and supported by their employers instead of thrown into a role without feeling competent and confident.

We can blame them for having thin skin and a lack of grit, or we can revamp

our onboarding for new hires and keep them longer.

TOP RETENTION PRIORITIES

For organizations that want to stabilize staffing moving forward, senior leaders glean the most bang for their buck on a

number of retention strategies:

Develop leaders at every level. Ensuring managers have the proper tools to successfully understand, manage and retain today's workforce is critical for future organizational success. Have you provided recent training on updated communication tactics and generational dynamics, including an in-depth view of Gen Z, emotional intelligence skills as more employees bring their "whole self to work" and other critical skill-building courses?

Revamp your on-ramp. Acclimating new hires into an organization and team takes months, not days or weeks. Consider improving the new-hire experience to ensure staff feel properly trained and supported as they begin their roles independently. Have you considered what your new team members truly need to know by the end of Day 1, Week 1, Month 1 and Quarter 1, creating a plan for greater support and mentorship throughout their first year with you?

Operationalize turnover. Losing staff is unavoidable. While reducing employee turnover can be accomplished in multiple ways, it never will be eliminated. As we create well-oiled machines in various operational and financial functions of the business, managing the churn of losing and replacing talent also should become a more efficient process for all parties involved. Have you created a plan and empowered ownership with collaborative HR and department leaders to ensure each step in the hiring and termination processes operates efficiently?

It's time to stop banging our heads against a wall thinking the new workforce is the problem. Leaders who get to know them, embrace their unique perspectives and make the necessary adjustments to effectively lead today's diverse workforce will win the talent battle. **RT**

The author is a workforce thought leader, keynote speaker and the president and chief retention officer at Magnet Culture, a Louisville, Kentucky-based training organization that works with leaders to reduce employee turnover. For additional information on employee-retention strategies, visit www.wereduceturnover.com or follow Silletto on LinkedIn.

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Paper recycling veteran Joel Litman of Texas Recycling has been a champion for the industry for decades and is the latest recipient of the ReMA PSI Lifetime Achievement Award.

EDITED BY **MARISSA MCNEES**



Joel Litman has been described by his peers as representing “the best of our industry” and someone who has served with “dedication and distinction.”

Litman is co-owner and president of Texas Recycling, a Dallas-based paper recycler he established in 1992 with his father, Stan, and brother, Craig. The family started the business with nothing more than a few folding chairs, a table and a phone but, “pound by pound,” Joel says, the business began to grow.

The company primarily focuses on buying and selling high grades like sorted office paper and deinking grades, as well as some bulk grades like old corrugated containers. Texas Recycling’s services have since expanded to include document destruction and metals recycling.

“Our approach to business is building long-term partnerships with generators and consumers, providing a high level of service and a quality product and being respectful to employees, customers, vendors and the community,” Joel says.

His service to the recycling industry is vast. Joel has been a member and leader within the former Institute of Scrap Recycling Industries, now the Recycled Materials Association (ReMA), Washington, as well as its Paper Stock Industries (PSI) and Gulf Coast Region (GCR) chapters. Along with serving as a board member

for then-ISRI, PSI, GCR and the Global Recycling Standards Organization, which oversees the Recycling Industry Operating Standard (RIOS), he was president of PSI from 2012-2014 and ran as a candidate for then-ISRI’s national secretary/treasurer position in 2022.

In October, Joel was honored at the Paper & Plastics Recycling Conference in Chicago with the ReMA PSI Lifetime Achievement Award—joining his father on the list of recipients—recognizing his many years of service and leadership.

In the following interview, Litman looks back on his four decades in the recycling industry, lessons he’s learned along the way and what it means to have an “impactful presence.”

RECYCLING TODAY (RT): You worked with your father and brother before establishing Texas Recycling. What were you doing before? Did you always envision working with your family?

Joel Litman (JL): My father bought a paper and rag scrap business, Daltex Waste Material Co., in 1980 in Dallas, and I joined him four years later. My goals were to earn a bachelor’s degree in journalism from the University of Missouri, then become a sports writer for a daily newspaper. Once I achieved these goals—and after a stint at a public relations/advertising firm in Dallas, where I accompanied such celebrities as a young Tom Cruise, a

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young Patrick Swayze and a young Bette Midler on film publicity and promotional tours—I joined my dad. I didn't have a specific plan but took advantage of an opportunity at the right time.

RT: What was your background in recycling before forming Texas Recycling? What were the challenges of starting up that business?

JL: I had only eight years in the recycling industry before forming Texas Recycling with my father and brother, Craig. All of us brought the backgrounds of working for larger companies in different industries to Daltex and Texas Recycling. Our experiences with providing customers with high levels of service, sales and communications and being hands-on rippled through all facets of our business from suppliers to consumers to vendors and employees.

When Texas Recycling opened Sept. 1,

1992, after my dad sold his share of Daltex Waste Material, all we had were a folding table, four folding chairs and a “brick” cell phone inside a 30,000-square-foot building, a bank loan and the wills and determinations of a father and two sons to succeed. We began to contact generators, retail customers, consumers, equipment dealers and truck dealers to move forward and secure material and, pound by pound, material began to come in. A few weeks later, our first load of high grades was shipped, and we've grown from there.

RT: How has Texas Recycling evolved since 1992?

JL: From three employees to more than 70 today. When we opened, our focus was deinking grades and high grades. Soon, we added metals along with our information destruction and production destruction company, Action Shred of Texas.

Our first salesperson retired after only a short time with us. One of our competitors' sales reps was calling on our accounts, and an opportunity came up to meet her. Craig and I visited Kathy DeLano and, soon after, we offered her a sales position with our company. That was nearly 20 years ago, and it's been a great relationship. [DeLano currently is vice president of sales at Texas Recycling.]

[We] welcomed the third generation of family to the business in 2011 when my daughter, Hillary Freed, joined to handle marketing and customer service. When we moved to a much larger facility in 2015, space was ample enough to accept loose corrugated, which we were unable to do in our previous facility, and our footprint has grown from 30,000 square feet to more than six figures today. Our secondhand fax machine has given way to computers and hand-held electronic devices; our trucks have GPS tracking devices and cameras on

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RT: Texas Recycling processes primarily high grades; how has that market changed over the last 30-plus years?

JL: The volume of high grades, from pre-consumer to postconsumer, has declined. There are fewer commercial printers, fewer printing and ancillary trade shops, fewer newspapers and fewer people working in offices. These dynamics impact how much preconsumer deinking grades are

generated and how much sorted office paper is collected. There are more bleached and unbleached packaging grades generated, and there is a trend away from plastic packaging towards fiber packaging. Consumer products need to be in a package to then be placed on a store shelf.

RT: What is Texas Recycling's approach to business and approach to recycling?

JL: Our approach to business is building long-term partnerships with generators and consumers, providing a high level of service and a quality product and being respectful to employees, customers, vendors and the community. As for our approach to recycling, we provide services and education to generators to help them achieve their goals on sustainability and keep material out of the landfill. We also help educate them that not every item can be recycled.

RT: How have the relationships you've built with customers set the business up for success? How important are those relationships when the market is facing turmoil? And why is the recycling business such a relationship-driven business?


JL: Our business model revolves around long-term partnerships and relationships, [like] commercial marriages. We want to have face-to-face relationships with our suppliers and consumers, and our team works hard to make that happen and to maintain it. We want our customers to know who we are, so when they have a special need, a project or another issue, they don't have to think about who their recycler is. This gives the customer confidence in its recycling vendor: us.

When markets are in turmoil, which they have been in throughout the years and will be in again, we want our customers to know we will be there to service


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them, and we want our customers to know that we can be counted on to be their service partner through any ups and downs of any business cycle. That's important because our industry is capital-intensive, where equipment, processing, transportation and logistics are integral parts to servicing the customer. It's not an industry where you select a product from a shelf. There are long-term service commitments made. Our company has a buy-back center where the public sells newspapers, corrugated, paper, aluminum cans and tin. Through the ups and downs of the markets, we've always taken these goods. Pricing adjusts with the markets, and we've remained open.

RT: How has your business adapted in response to events over the past several years, like the pandemic, economic uncertainty, policy/regulations, etc.?

JL: Events such as these offer opportunities to recalibrate, to see if certain parts of the business are still viable. During the pandemic, no employees were laid off. There was a backlog of product in storage that had to be processed and that kept everyone busy, although at reduced hours. It also served as a rally cry and a unifier throughout the company—and the backlog soon disappeared.

Economic uncertainty also provides opportunities to reexamine processes and service work to determine if certain elements of the business continue to remain profitable. Maybe some accounts have changed their product mix and are no longer a fit for our business, or maybe they've downsized and do not generate the amount of recyclable material as they had in the past. On the other hand, maybe they've grown and their service needs have increased (which we love). Governmental policies and regulations have also caused us to look at some business lines that are no longer viable to process and are tightly regulated, such as electronics and certain nonferrous metals.

RT: What are the biggest challenges you see currently facing the recovered paper industry and the overall recycling industry?

JL: Much like any industry, whether transportation, retail or finance, they evolve. Old generations move on and new generations come in with new ways to do things. Challenges include the downsizing of the printing industry—one of the top generators of recycled materials for consumers in our industry. With less deinking and high grades being generated, mills consuming these grades are working on how to replace these vanishing grades.

The perception that everything can be recycled presents challenges, too. Organizations such as ReMA are working to help educate the public on what can be recycled and why. The education challenge is immense among the public and private sectors, but necessary to continue to capture materials for recycling and reduce the amount of volume going to the landfill.

Governmental policies are also challenging. Our industry has been around for decades and has an infrastructure in place to capture materials and push them through the recycling supply chain. Many governmental entities and even consumer product companies are realizing this and are eager to become involved with recycling. They are welcome to join the fray, but also have to understand that we've been around a long time and there is

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an order to how our industry works. It's supply-and-demand based. If the demand is there for products, you then find the supply to make those products. One can't just collect the supply without the demand for it and believe that it is recycling.

RT: What are the biggest lessons you've learned over the years?

JL: When I was training for running events, I had a ready answer when the staff at the neighborhood running store would ask what I am training for. Now, when

the young staffer asks a senior like me what I'm training for, my answer is "life." It makes them pause since the response is totally unexpected, but then they get it.

This industry is diverse in its people, companies, product mix, supply chains, manufacturing, etc. It teaches life experiences. Look at the supply-and-demand model we deal with daily, the workforce challenges [and] governmental challenges, the highs and lows of pricing and margins. I've learned when markets get strong, don't get excited because they will go the other way, and when markets are weak ... they will go the other way. You learn the power of relationships and partnerships ... and how to be reliable problem-solvers.

Being a good neighbor in your community also is very beneficial. Just as you're a good neighbor [at home], it's essential to do so where your business is. With recycling facilities facing NIMBY (not in my backyard) challenges, you need to show your neighbors who you are, what you do and the positive impact your business has on the community, such as employment opportunities, supporting local schools and city entities and assisting wherever possible. Your presence is very impactful.

RT: What advice would you give to someone entering a career in recycling?

JL: Recycling has long-term environmental impacts on our world. How to repurpose materials into new products is essential to the viability of our world and its resources. Those looking at our industry as a career can bring new thought processes and technology to an industry that has been around for centuries. Some get into the business ... to help the environment, which is a very altruistic goal, but it has to be profitable. The industry is generally not supported by taxes and is capital-intensive.

Also, [be] active in the industry's trade association, ReMA, which has more than 1,600 members handling paper, metal, plastic, electronics and other commodities. It's a great resource for networking with industry peers and provides safety programs and represents the industry in helping with governmental policies. **RT**

The author is managing editor of *Recycling Today* and can be reached at mmcnees@gje.net.

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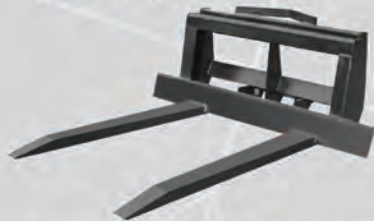
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Terex buys Environmental Solutions Group

Terex Corp., Norwalk, Connecticut, has completed its acquisition of Environmental Solutions Group (ESG) from Illinois-based Dover Corp.

ESG's product brands include Heil, Marathon, Curotto-Can, Bayne Thin-line and Parts Central, and its digital solutions include 3rd Eye and Soft-Pak. Terex says ESG's products and services across equipment, digital and aftermarket offerings complement its business, allowing Terex to expand its customer base by offering a broader suite of environmental equipment solutions.

"We're delighted to welcome ESG into the Terex family of businesses," Terex President and CEO Simon Meester says. "ESG is a noncyclical, financially accretive, market-leading business that will complement and strengthen Terex's portfolio with synergies in the fast-growing waste and recycling end market. ESG is led by a

world-class management team and has a strong track record of operational excellence. We look forward to working with ESG to drive long-term, sustainable value for all our stakeholders."

Terex says the deal will drive revenue growth, free cash flow, earnings before interest, taxes, depreciation and amortization (EBITDA) margin and earnings per share (EPS) accretion.

Julie Beck, Terex senior vice president and chief financial officer, says ESG's EBITDA margin, including run rate synergies, is expected to add 140 basis points of margin accretion. Additionally, Terex will achieve approximately \$25 million of identified synergies by 2026.

According to Terex, the all-cash transaction for \$2 billion, or \$1.725 billion when adjusted for the present value of expected tax benefits of approximately \$275 million, is expected



to be double-digit percentage-adjusted EPS accretive in 2025.

With ESG, Terex will derive 67 percent of its total revenue from North America, an increase from 61 percent based on results from the second quarter of 2024.

ESG retains President Patrick Carroll, who has led manufacturing businesses and served as president of Terex Utilities from 2001-2005.

"At ESG, our vision has always been to improve the lives of our team members, our customers and our communities," he says. "We are looking forward to becoming part of Terex because we see it as a great cultural fit with opportunities to expand our positive impact."

Photo courtesy of Heil

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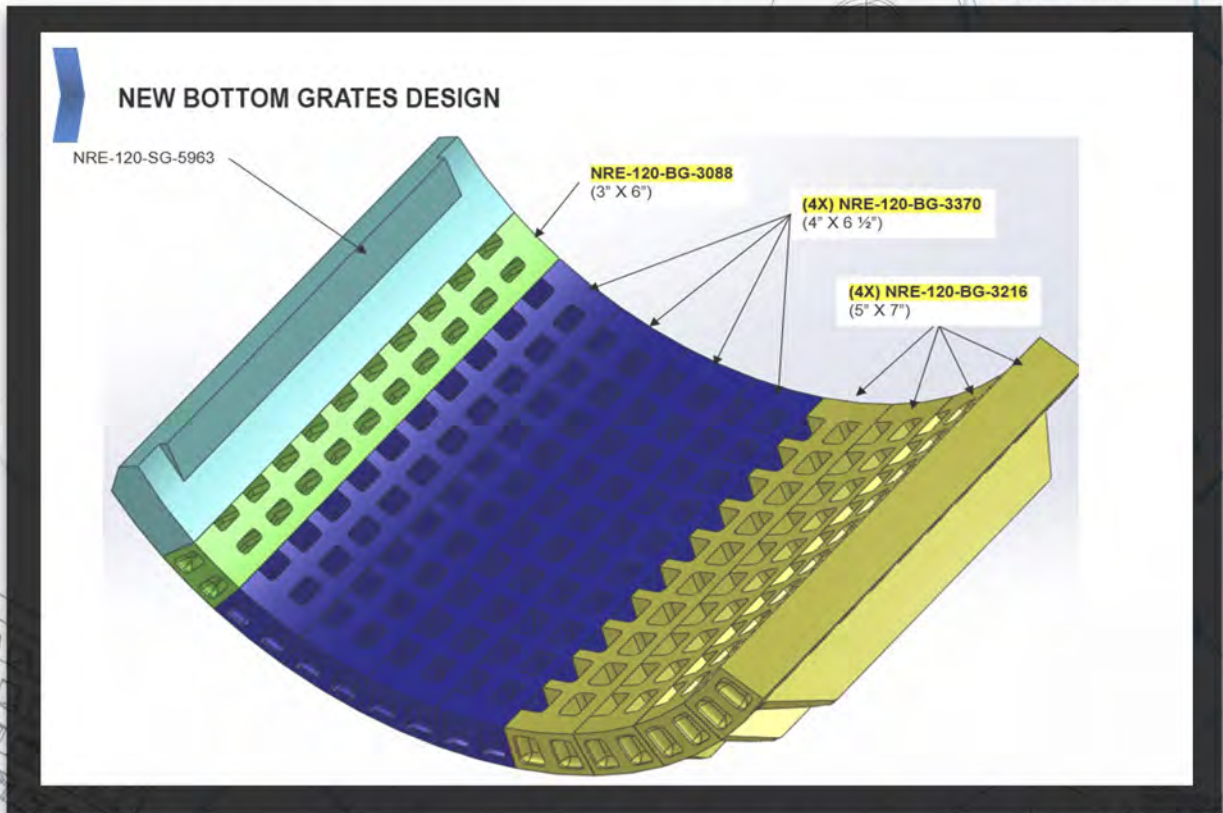
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Steinert acquires MSort product line

Germany-based Steinert GmbH, which specializes in sensor sorting and magnetic separation equipment for municipal solid waste, metal recycling and mining, has acquired the MSort product line from Mogensen GmbH & Co. KG, based near Hamburg, Germany.

Along with the purchase, Steinert also has announced it is establishing a new subsidiary, Steinert MSort.

The MSort product brand has been present in the global market for more than 20 years and has focused primarily on developing sorting systems for glass recycling, the processing of industrial minerals and other applications.

The Buchholz family, which owns Steinert, says in a news release it is pleased with the establishment of a new



From left: Steinert shareholders Klaus and Denise Buchholz, Joest Group Managing Partners Marcus Wirtz and Hans Moormann and Steinert Managing Director Peter Funke

subsidiary that can offer additional sorting solutions and have expanded the company's portfolio to include translucency and double-sided detection using color and near-infrared (NIR).

The MSort AF, for instance, performs dry color sorting of bulk material,

including glass, polyethylene terephthalate, minerals, sea salt and rock salt, in a particle range of 4 to 60 millimeters.

"The expansion of the Steinert Group's portfolio to include sorting systems for flat and hollow glass and aggregates for sorting industrial minerals for mining are just a few examples that are a plus for us," Steinert CEO Peter Funke says. "The MSort brand from Mogensen is strong and complements our product range excellently. We look forward to working with the colleagues and thank our owners, the Buchholz family, who have made further growth possible."

Hans Moormann and Marcus Wirtz, managing partners of the Joest Group, which owns Mogensen, say they know the MSort product line is in good hands with Steinert.

"We are handing over the product line to a top company with a strong global sales and service network," they say.

Photo courtesy of Steinert GmbH

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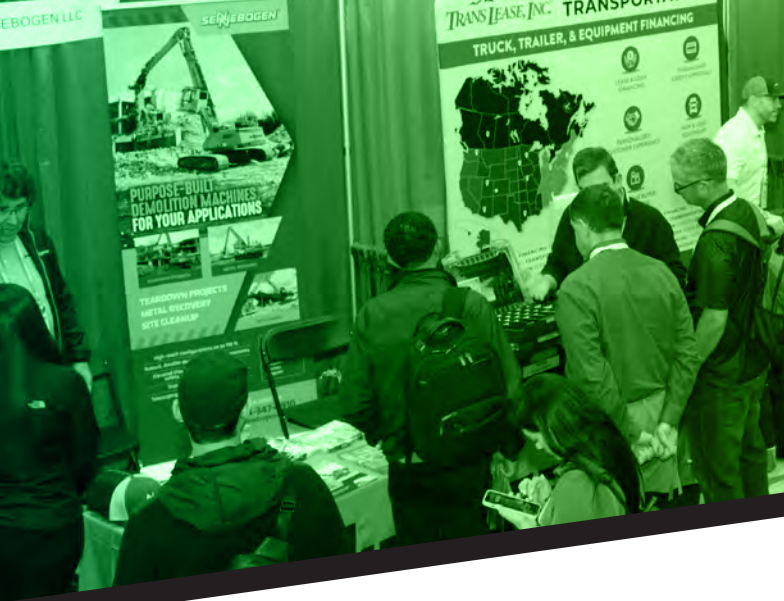
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- is offered in a single-pole design that removes general tramp metal from a range of products in various applications
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PELLENC ST CNS BRAIN ELECTRONICS AND SOFTWARE PLATFORM.

France-based Pellenc ST says it has harnessed its expertise in artificial intelligence to propose a new solution for paper sorting called CNS (central nervous system) Brain. The new electronics and software platform:

- is designed to integrate future sensors and technologies and enables users to keep their sorting performance up to date with the latest developments
- features new materials classification software called Advanced Classification, which makes it possible to separate more complex materials, such as polyethylene terephthalate bottles from trays or paper from cardboard
- enables the integration of a Profile Detection option, a new sensor for detecting carbon blacks and inert materials
- is available as an upgrade or as standard on the Mistral+ Connect and Compact+ sorters
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London-based Greyparrot has made its next-generation Analyzer unit available. The unit is designed to inspect material recovery facility (MRF) streams and is positioned above conveyor belts. The next-generation Analyzer unit:

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Drew Mims

OWNER OF MIMS RECYCLING

Drew Mims' passion for scrap recycling began as a family affair. Growing up, he would travel with his parents as they performed demolition jobs, fostering an appreciation for the industry.

"I always used to say I wanted to be just like my dad," he says.

His parents were his role models and, as a child, he took their examples seriously. So seriously that he once told his pre-K teacher he would be missing school the next day to go to work with his father.

"She said, 'I've heard a lot of excuses for reasons not to come to school, but going to work has never been one of them,'" he recalls. "It's always been in my blood—to work."

Drew started working after school as a laborer at his family's recycling business, Louisiana-based Mims Recycling of Ruston LLC, tasked with cleaning nonferrous metals. As he got older, he began operating equipment and joined the company in an official capacity upon graduating high school in 2018.

"My first official job was running a shear on a demolition project," he says. "I probably had several roles."

Within the last year, Drew took over Mims Recycling as owner and operator. Both his parents still are involved with the company, though Drew now handles daily operations.

"I really have a true passion for this industry," he says. "I had good role models growing up [in my] parents [and] a lot of our employees; I look up to them. I've been surrounded by wonderful people, and that's why I'm where I am today."

In the following interview, Drew discusses career challenges and the recycling industry's biggest hurdles.

RECYCLING TODAY (RT): What has been the biggest challenge in your career so far?

DREW MIMS (DM): My age. Right now, I'm only 22, so when I first started ... I would go out and continue the relationships my dad had established. That was challenging, being 18 years old, talking to a well-established businessman who's been doing business with my father for the past 10 years.

A lesson I've learned is [to] under promise, over deliver. If I can't do something, I tell them I can't do it. We have a roll-off service where we service about 100 to 120 industrial accounts. ... If they need their box swapped out at 5 a.m., and your guys aren't going to get in until 7:30 or 8, don't tell them, "I'll be there at 5." ... If you get a reputation of being unreliable, you lose business that way.

I've always ... been totally transparent with our clients. This is a for-profit industry. You have to make money and be profitable to sustain [your business] and compete with some of the larger companies.

Be upfront about that. There's no reason to hide.

RT: What do you see as some of the biggest challenges impacting the recycling industry today?

DM: There's a lack of education. Folks not in the industry aren't really aware of where this material goes once they drop it off at a facility. ... I think we should implement that in schooling somewhere. In grade school, children should know about this.

RT: How can the industry recruit young professionals given this lack of public knowledge about it?

DM: I would put money on it. We're a billion-dollar industry. ... So, you have to let people know there's opportunity to grow, especially if you get within a company that cares about the people working for them.

Talk to some of the high schools. Educate people. ... Let people know that there's money to be made, there's opportunities to grow.



“

Let people know that there's money to be made, there's opportunities to grow.”



+

Hear the full interview by visiting *Recycling Today's* podcasts section at www.RecyclingToday.com/tag/podcasts.

Do you know any new or young professionals in the recycling industry? Send suggestions to Tess Kazdin at tkazdin@gie.net.

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