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**National Waste
& Recycling AssociationSM**

Industry Perspective on Bottle Bills

July 17, 2025

About NWRA

The National Waste & Recycling Association (NWRA) is the voice of the nation's private sector of the waste and recycling industry that is essential to maintaining the quality of American life. The delivery of waste and recycling services impacts all residential, commercial, and industrial properties on a daily basis.





Our Members

Association members operate in all 50 states and the District of Columbia and can be found in most U.S. congressional districts.

Roughly 18,000 waste and recycling facilities are located throughout the U.S. mirroring population centers.

More than 700 members are a mix of publicly-traded and privately-owned local, regional, and Fortune 500 national and international companies.

NWRA represents approximately 70 percent of the private sector waste and recycling market.





What is a bottle bill?

At its most basic:

- A system in which consumers pay a deposit – typically \$0.05 to \$0.10 per container – when they purchase covered beverages.
- The consumer gets a refund of their deposit when/IF they return the containers to a redemption facility.



In the beginning...

10 States With Bottle Bills

State	Year
Oregon	1971
Vermont	1972
Maine	1976
Michigan	1976
Connecticut	1978
Iowa	1978
Massachusetts	1982
New York	1982
California	1986
Hawaii	2002

Growth of Curbside Recycling Collection Programs

Year	# of Programs
1980	1
1988	1,042
1992	5,202
1997	about 9,000
2002	8,875

Sources: Biocycle, State of Garbage in America, January 2004; EPA.

Deposits collected from consumers

OR	VT	ME	MI	CT
10¢	15¢ for liquor and spirits, 5¢ otherwise	15¢ for liquor and wine above 50mL, 5¢ otherwise	10¢	10¢

IA	MA	NY	CA	HI
5¢	5¢	5¢	5¢ for beverage containers less than 24 ounces, 10¢ for 24 ounces or larger, and 25¢ for wines and distilled spirits in a box, bladder or pouch	5¢ plus 1¢ non-redeemable handling fee

What's redeemable?

Container	OR	VT	ME	MI	CT	IA	MA	NY	CA	HI
Carbonated Soft Drinks	X	X	X	X	X	X	X	X	X	X
Beer & Malt Drinks	X	X	X	X	X	X	X	X	X	X
Sparkling Water	X	X	X	X	X	X	X	X	X	X
Non-Sparkling Water	X		X		X		mineral water	mineral or flavored, unsugared	X	X
Sports Drinks	X	carbonated	X		X		carbonated	carbonated	X	X
Energy Drinks	X	carbonated	X		X		carbonated	carbonated	X	X
Juice	X	carbonated	X		X			carbonated; <100% w/added sugar or water	X	X
Tea & Coffee	X		X		X			carbonated	X	X
Wine			X			X		X	X	X
Mixed Spirits	X	X	X	X		X			X	X
Spirits (Liquor)		X	X			X			X	
Misc. other					X					



Where are returns accepted?

State	# redemption centers	Retailers required to redeem?	Yes	But
Oregon	100 Green & Blue bag drops; 27 redemption centers; expiress sites; 2,500 retail stores with machines	Yes, but	Depends on size and location	A new opt-out system takes effect October 2025 in large cities
Vermont	70	Yes		
Maine	320	Yes, but	If more than 5,000 sq.ft.	can register with a redmeption center within 10 miles
Michigan	unknown	Yes		
Connecticut	32	Yes		
Iowa	133	Yes, but	Opt-out based on population and proximity (10 or 15 miles) from redemption center	
Massachusetts	114	Yes		
New York	unknown	Yes		
California	1,299 recycling centers; 3,601 retailers	Yes	Stores in areas without recycling centers must redeem containers or join cooperative systems as of January 2025.	
Hawaii	53	Yes	If they are > 2 miles from a redemption center	



What is “convenient”?

Curbside recycling

- Place beverage container in recycling bin
- Put recycling bin at the curb
- A truck picks up recyclables on a regular schedule

Container deposit system

- Store bottles and cans until you have enough to justify a trip
- Carry your empty containers to a:
 - Retail store where you spend time putting containers in a reverse vending machine
 - Seek alternative redemption site for when their machines are full, broken, or under repair
- Store can post the address of a “conveniently located” redemption center”

Redemption Rates

State	2022	2023
Oregon	86%	87%
Vermont	72.4%	71.5%
Maine	78%	77%
Michigan	76%	73%
Connecticut	44.5%	43.2
Iowa	37% - 49%	NA
Massachusetts	38%	36%
New York	69.9%	68.3%
California	60%	59%
Hawaii	58%	55%

Source:
Container Recycling Institute



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Escheats = unclaimed deposits

A significant amount of consumer deposits are not returned to the consumers.

	Year	Deposits Collected	Refunds to Consumers	Unclaimed Deposit %	Unclaimed Refunds
Oregon	2023	\$230,600,000	\$208,800,000	9.0%	\$21,800,000
Vermont	2023	\$12,752,432	\$9,117,959	28.5%	\$3,634,443
Maine	2023	NA	NA	23.0%	NA
Michigan	2023	\$389,500,000	\$284,600,000	27.0%	\$104,900,000
Connecticut	2023	\$92,578,380	\$39,993,860	56.8%	\$52,584,520
Iowa	2021	\$97,212,806	\$36,454,802	62.5%	\$60,758,004
Massachusetts	2023	\$112,096,875	\$40,354,875	64.0%	\$71,742,000
New York	2023	\$382,035,233	\$260,930,064	31.7%	\$121,105,169
California	2023	\$1,480,678,000	\$1,080,523,000	27.0%	\$400,155,000
Hawaii	2024	\$49,024,940	\$28,189,341	42.5%	\$20,811,105
Single year snapshot		\$2,846,478,666	\$1,988,963,901	30.1%	\$857,490,241

How are escheats distributed?

- Not all state laws identify how the escheats are to be used.

Oregon	Distributors through the Oregon Beverage Recycling Cooperative (OBRC)
Vermont	To state for the Clean Water Fund
Maine	As of 7/15/25, all escheats to Commingled Cooperative to support the Bottle Bill program
Michigan	First \$1 million to MI State Police; then 75% to EGLE; 25% to retailers or dealers
Connecticut	Split between distributors and state
Iowa	Distributors
Massachusetts	State
New York	80% to state; 20% to distributors
California	Used to administer the beverage container recycling program
Hawaii	State

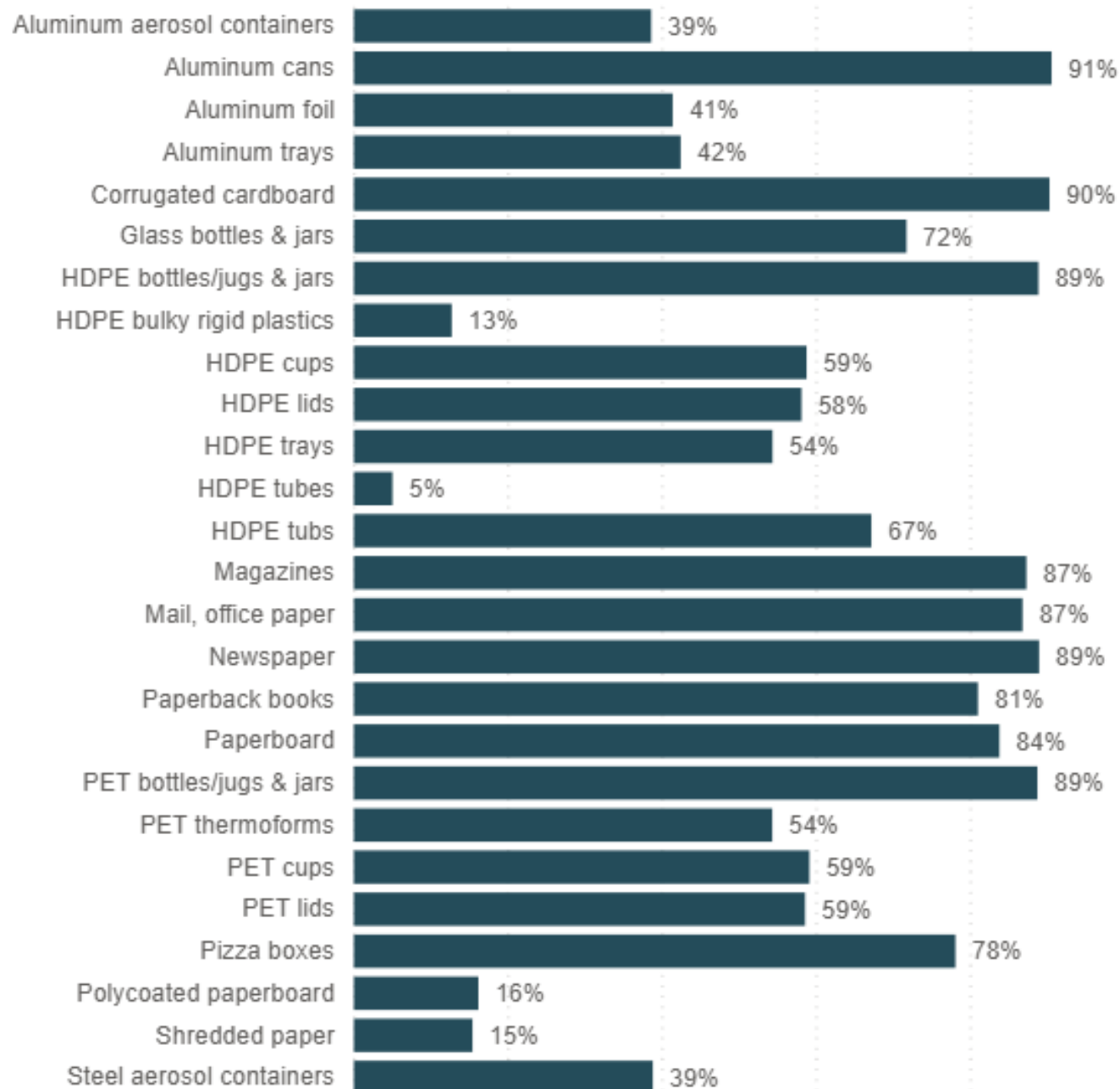
Recycling Infrastructure Today

- Of 125.7 million US households
- “A network of more than 9,000 separate, local recycling programs”
- Households with recycling
 - 61.4% curbside = 77 million
 - 20.3% drop-off = 26 million
 - 10.6% subscription = 13 million
 - Only **7.7%** without recycling access = 10 million
- Accepted from single and multi-family homes by category:
 - Aluminum cans: **91%**
 - Glass bottles & jars: **72%**
 - PET bottles, jugs, & jars: **89%**

Source: The Recycling Partnership, Community Recycling Program Acceptance Data, released 9/16/2024

Recycling Programs Accept More

Source: The Recycling Partnership, Community Recycling Program Acceptance Data, released 9/16/2024



Are Bottle Bills necessary?

- Bottle bills only cover beverage containers – about 80% of curbside recyclables are not beverage containers
- Consumers will decide between Bottle Bill or curbside program every time they empty a container
 - Convenience of curbside without refund
 - Refund but with less convenience
- Curbside collection vehicles and MRFs will still need to accept redeemable containers

Effects of Bottle Bills on Curbside Systems?

- RRS Study, “Economic Impact of Beverage Container Deposits on Municipal Recycling Program Costs,” Sept. 2021
- Prepared for NWRA
- Seek to understand effects of beverage container deposit systems on MRF operations and on municipalities
- Assumed average MRF serving 1.25m population

Study Conclusions

- Bottle bills reduce, but don't eliminate, the flow of beverage containers to curbside systems
 - Trucks on route are less full
 - Fewer tons are sent to the MRF
- MRF revenue is reduced about 30% – lose aluminum cans and PET containers
- Operations costs don't decrease
 - Fixed costs per ton are higher - same equipment and staff divided over fewer tons
 - Variable costs decrease slightly but not enough to offset
- Where local governments have contracts with service fees and/or revenue sharing, bottle bills hurt local governments



Make unclaimed deposits support recycling

- Consumers putting redeemables in their recycling bin believe they are contributing the deposits to their MRF
- NWRA supports a permanent 80/20 distribution of refund value on redeemable containers delivered to MRFs:
 - 80% to be distributed to municipalities
 - 20% to be retained by the MRFs
- Recommend it be written into any new Bottle Bill

Takeaways and recommendations

- Existing recycling infrastructure was built to handle the containers potentially carved out into a Bottle Bill
- Bottle bills are duplicative recycling programs
- Bottle bills are not current or cutting-edge programs
- If a bottle bill is adopted, MRFs should be allowed to receive refunds for the redeemable containers they accept
- Channel escheats toward funding municipal recycling programs
- Where EPR systems are planned, keep beverage containers in the larger EPR program instead of a parallel Bottle Bill

Thank you.

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