

# How tariffs are shaping the waste and recycling industry

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# WASTEDIVE

- **Founded in 2012 as one of Industry Dive's five original publications**
- **2025 focus: Independent journalism, in-depth coverage, original insight**
- **Email newsletters Monday-Friday**
- **Weekly recycling newsletter Wednesday**

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# Major themes and questions

- Recyclers, traders, businesses still in “wait and see” mode
- Consumer spending/confidence plays a role
- Tariffs are adding to other seasonal market effects for certain commodities
- Equipment and routine parts replacements effects
- Uncertainty into 2026 and beyond

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# The plastics picture

- rPET, PP, PE part of USMCA
- Tariff-induced overbuying and pre-buying for rPET in March/April
- Summer season for PET not as strong, leading to oversupply
- 2026 contracts up in the air



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# Tariff impacts on paper markets

- Economic indicators vs. tariff impacts
- Customer confidence and purchasing patterns
- AF&PA: **70%** of external fiber trade is with Canada, Mexico
- Mills have been planning for this





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# Section 232 and beyond

- Section 232 aluminum and steel tariffs **went from 25% to 50%.**
- Aluminum beverage can is made of about **71% recycled content**
- U.S. imports about **80%** of steel tinplate for cans



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# Equipment and fleet impacts

- Equipment purchase impacts
- Major waste companies preparing for 2026
- Steel for fleets mainly domestic
- Parts like screens, super sacks may be subject to tariffs



# Tracking tariffs





- **Supply Chain Dive** monitors a range of tariff changes on its daily tracker
- **Packaging Dive** covers fiber-specific impacts of tariffs, as well as general packaging economic trends

## What is the status of tariff threats?

The U.S. has unveiled a complex web of trade actions. Keep track of the most impactful ones, and how other countries are retaliating, below. Use the search bar to filter by sector or country.

Search in table

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| Government  | Target  | Action                   | Active? | Status   |
|---|---|--------------------------|---------|--|
|  → | All   | U.S. trade policy review | ✓       | President Donald Trump in January <a href="#">directed federal agencies</a> to evaluate U.S. trade policy and relationships. The evaluations were due April 1 and set the stage for the administration's approach to trade agreements, import policies and other future actions.   |
|  → | All   | U.S. global tariffs      | ✓       | Imports from all countries are subject to a <a href="#">baseline 10% tariff</a> as of April 5. The U.S. has also <a href="#">set higher rates</a> for several countries, which will become effective Aug. 7. Rates from tariff agreements with trading partners were included among the new list of duties.  |
|  → |  | U.S. tariffs on China    | ✓       | The U.S. will <a href="#">charge many imports</a> from China an extra 30% tariff rate until Nov. 10, following multiple extensions of a temporary agreement. The rate is a combination of 20% tariffs related to fentanyl trafficking and a 10% baseline reciprocal tariff. The cumulative 30% rate is significantly lower than an earlier rate — which reached 145% — after the U.S. and China agreed to temporarily de-escalate an ongoing trade |



# How are tariffs affecting your agency or business?

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