



Current State of PCR PP Suppliers in the US

Methodology

PreScouter conducted a thorough review of available databases, along with multiple brief interviews with representatives from recycling companies across the USA. This approach helped to estimate the total capacity in the USA to supply post-consumer PP and gather specific information on other key metrics, including grades, number of facilities, partnerships, and key challenges.



Suppliers of PCR polypropylene | Capacities

 RECYCLING COMPANY	 LOCATIONS	 CURRENT CAPACITY (2024)	 FUTURE CAPACITY IN 5 YEARS (2029)
KW Plastics Recycling Division	5 plants Alabama, US	375 mlbs/y	"Continually growing"
Padnos	2 plants Michigan and Indiana, US	100 mlbs/y	200 mlbs/y
Plastic Recycling Inc. (PRI)	9 plants Missouri, South Carolina, Indiana, and Tennessee, US	100 mlbs/y	160 mlbs/y
PureCycle Technologies LLC.	1 plant Ohio, US	70 – 100 mlbs/y	300 mlbs/y
Polyfit, Inc.	2 plants California, US	60 mlbs/y	"Dependent on the market"
Go Green Industries, Inc.	2 facilities California and Texas, US	24 – 25 mlbs/y	50 – 60 mlbs/y
Greenpath Recovery, Inc.	2 facilities California and Texas, US	20 – 25 mlbs/y	50 mlbs/y
Material Difference Technologies	2 facilities Texas and North Carolina, US	12 mlbs/y	"Ideally, we'd like to double our production"
St. Joseph Plastics (independently run subsidiary of PRI)	2 plants Missouri, US	8 mlbs/y	N/A
Custom Polymers, Inc.	5 facilities 2 in North Carolina, 2 in Alabama, and 1 in Texas, US	4.2 mlbs/y	5 to 6 mlbs/y
Kal-Polymers	1 plant Georgia, US	1 to 2 mlbs/y	5 mlbs/y
Firstar Fiber, Inc.	2 plants Nebraska, US	0.003 mlbs/y (250 tons per month)	0.018 mlbs/y (1,500 tons per month)

Total: 793 million pounds [369.5 ktons]

Total estimated: 1373 million pounds [686.5 ktons]
CAGR: 11.6%

PCR PP suppliers expect to grow their current capacities.

In 2024, the capacity of PCR PP supply in the US is estimated to be **~800 to 1,000** million pounds per year (~400 – 500 ktons). Based on 13 answers regarding expected future capacity in 5 years, PreScouter estimates the capacity in 2029 to be **1,300 to 1,500** million pounds per year (~650 – 750 ktons). The calculated compounded annual growth rate (CAGR) is **11.6%**.

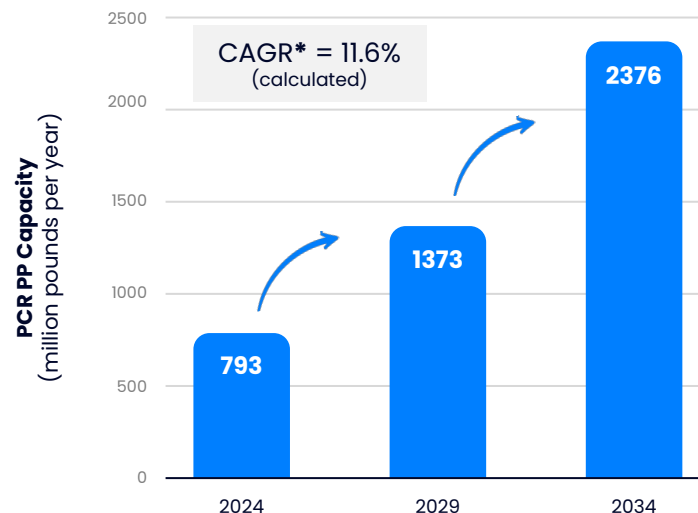


Figure. Post-Consumer Recycled Polypropylene (PCR PP) capacity for 2024 and 2029 as reported by 12 companies: KW Plastics Recycling Division; Padnos; Plastic Recycling Inc.; PureCycle Technologies LLC; Polyfit Inc.; Go Green Industries, Inc.; Greenpath Recovery, Inc.; Material Difference Technologies; St. Joseph Plastics; Custom Polymers, Inc.; Kal-Polymers; Firstar Fiber, Inc. **PCR PP Capacity for 2034** was estimated based on CAGR of 11.6% (calculated for the previous period). Data was obtained from direct contact with noted companies.

Notes: Envision Plastics and RheTech did not provide information on their capacities. M. Holland Company confirmed being a distributor and was not considered in this analysis. PreScouter did not obtain responses from Primex Plastics Corporation and CT Polymers (likely suppliers).

Some notable suppliers in terms of their claimed capacities are **KW Plastics, PureCycle, Plastic Recycling and Padnos.**

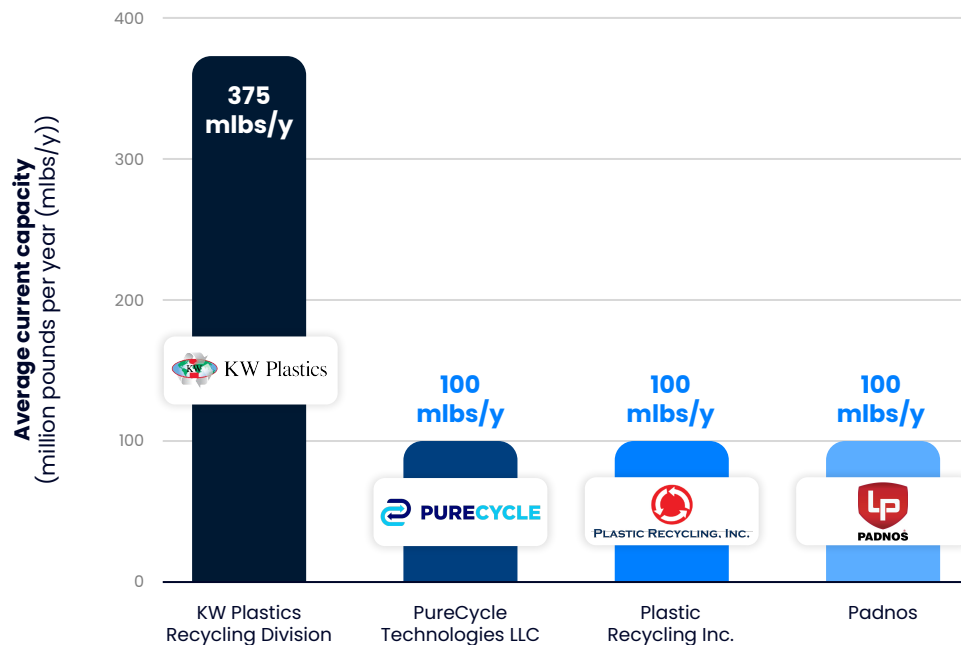
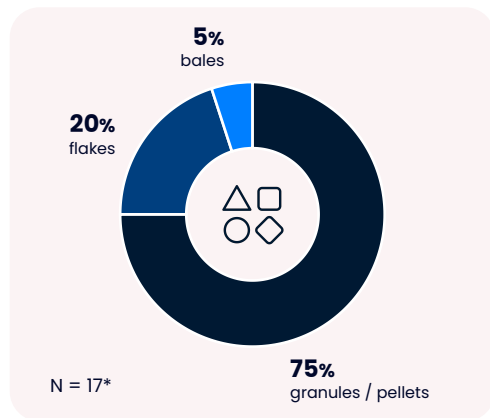


Figure. Average current capacities of top 4 suppliers of post-consumer recycled polypropylene in the US, based on PreScouter's research.

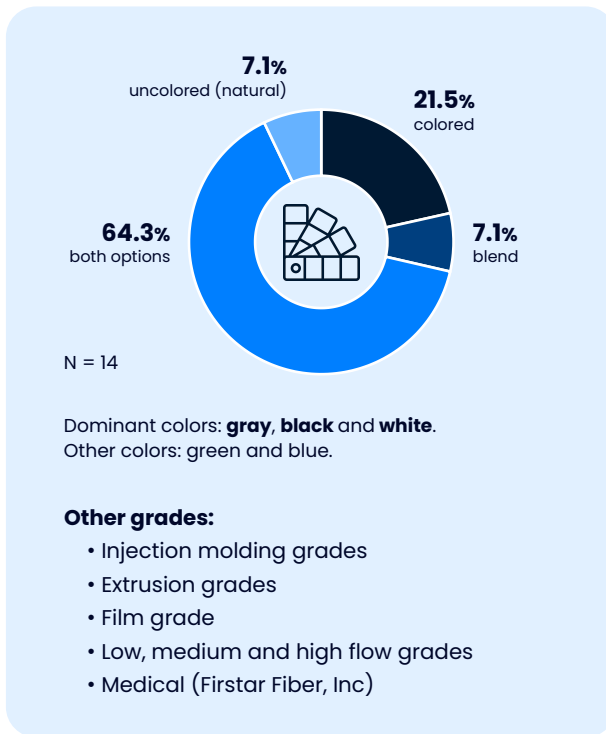
Suppliers of PCR polypropylene | Key insights

Product Types

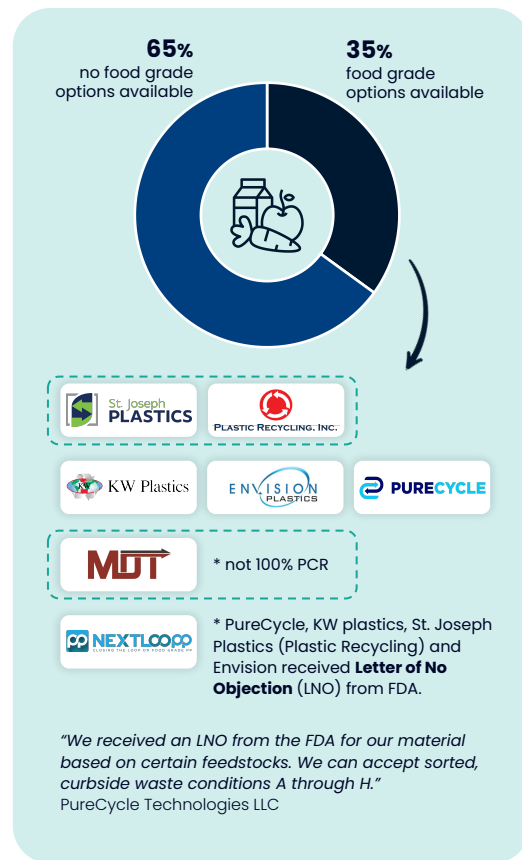


Note: *combination of primary and secondary sources

Colored vs. Uncolored Grades



Food Grade



End-use applications

Main application areas:



Consumer goods



Automotive



Packaging

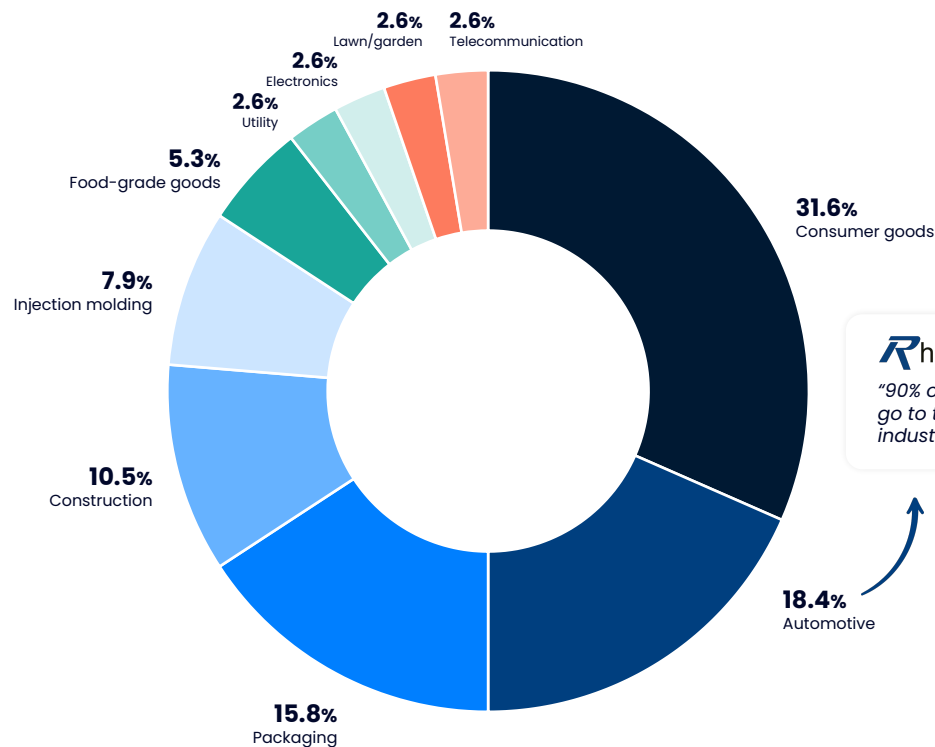
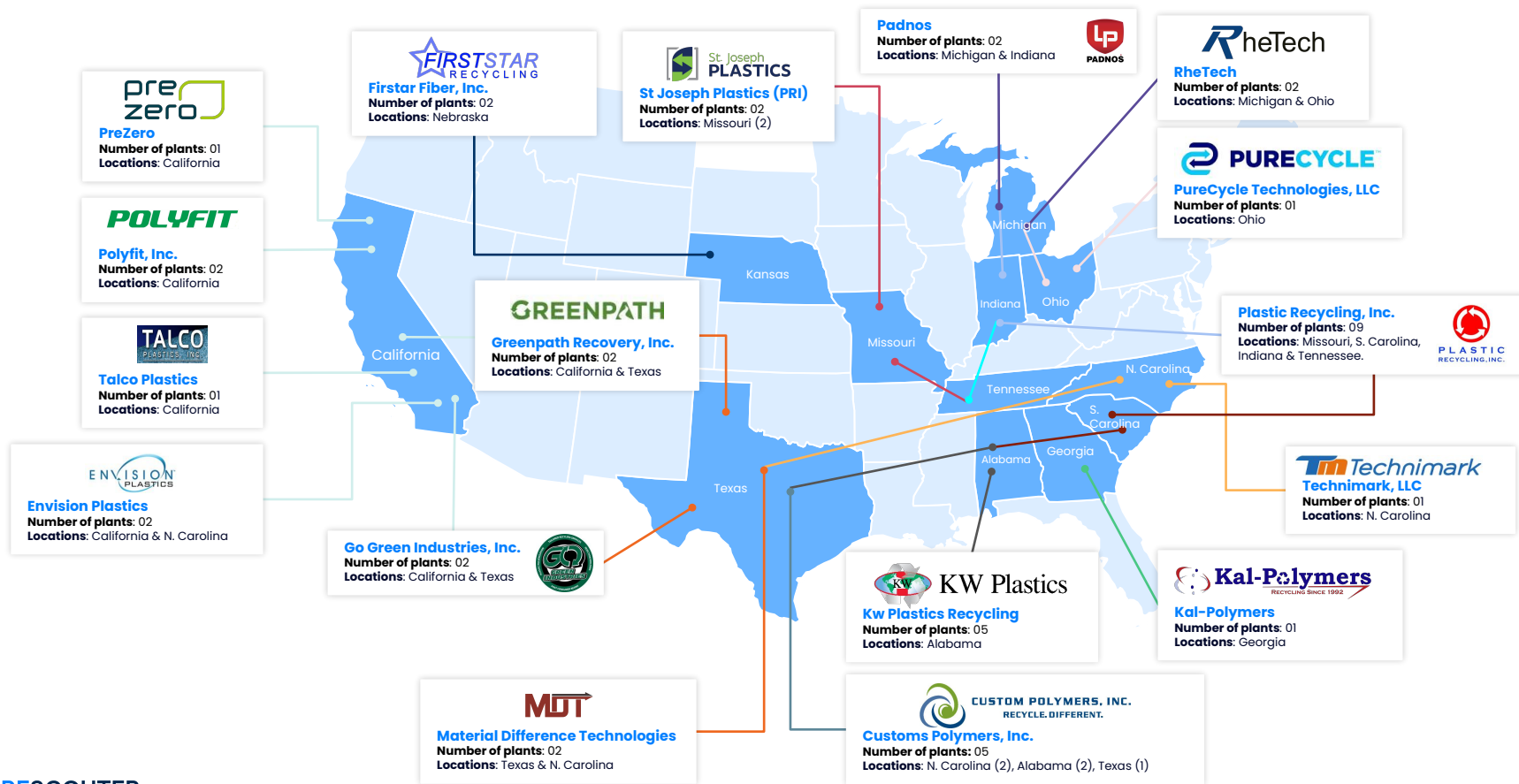


Figure. Distribution of market segments for recycled material applications.

Note: Based on responses from 15 interviews.

Suppliers of PCR polypropylene in the US | Facilities location



Alabama, California, North Carolina and Texas are the states with more facilities recycling post-consumer polypropylene.

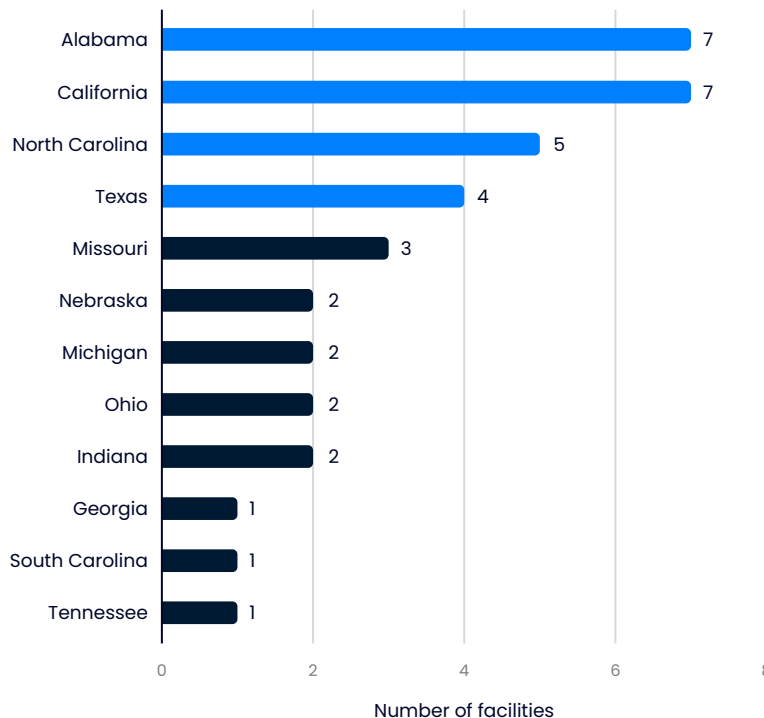
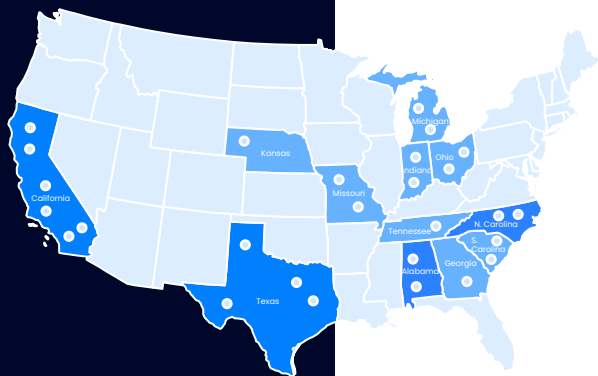
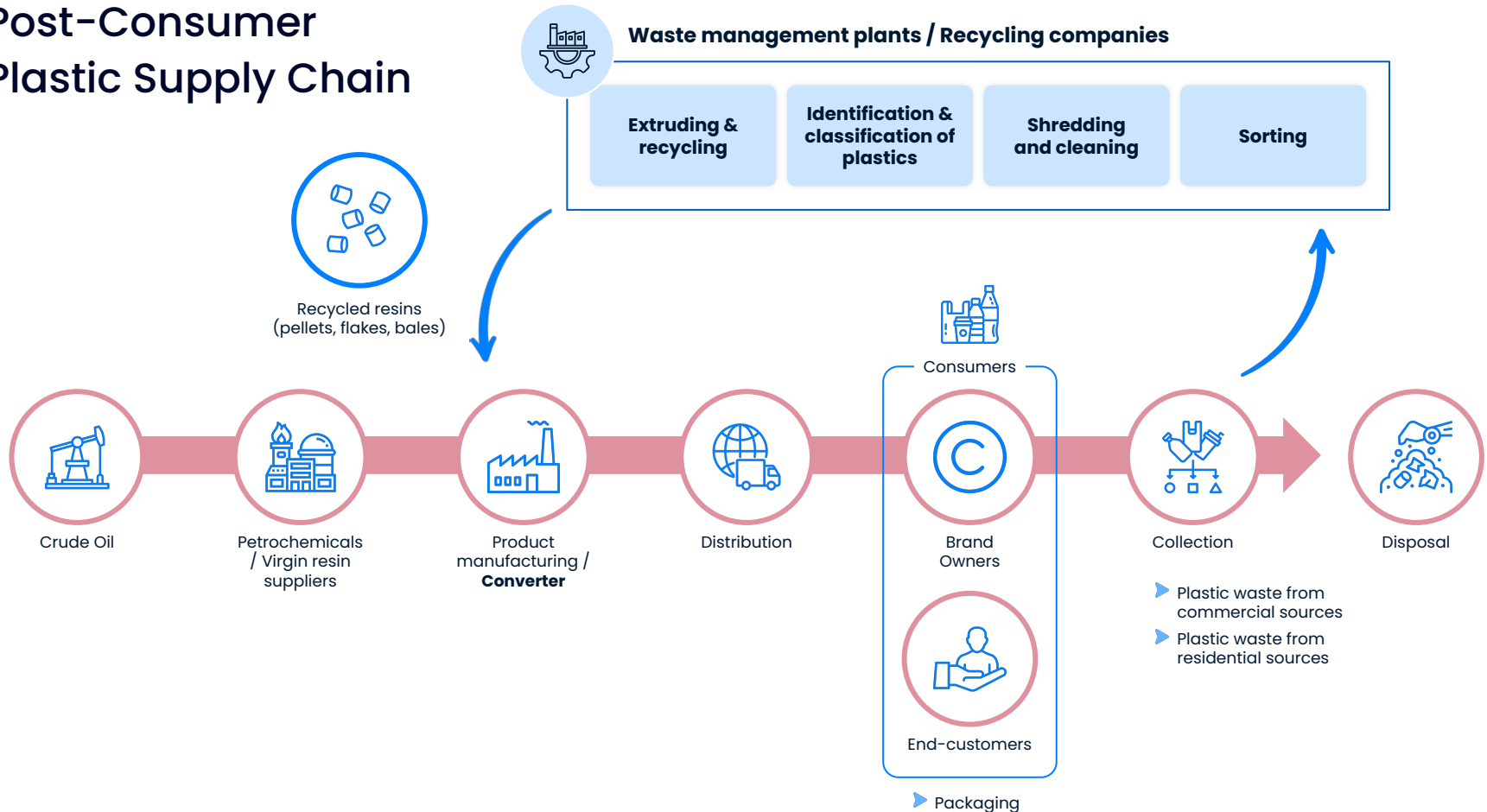


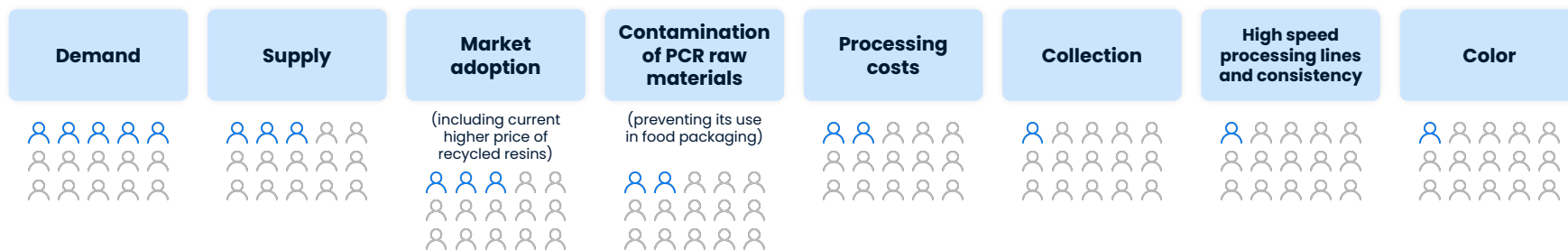
Figure. Number of facilities recycling post-consumer polypropylene across the US as 2024.

Post-Consumer Plastic Supply Chain



Main challenges reported by recycling companies

Insights from 15 managers and directors reveal key challenges hindering the scale-up of PCR PP production. Demand and supply constraints are the primary barriers to broader adoption of post-consumer recycled PP. Additional challenges include higher costs compared to virgin plastics, material contamination, collection and processing issues (such as speed, consistency, and cost), and a mismatch in color demand, with a preference for natural hues while most PCR PP resins are typically gray.



“Having strong and consistent demand from brand owners for PCR PP which is higher price relative to virgin materials. PCR cannot be cheaper than virgin. Regulatory pressure is the key to drive more demand, though companies may find it more economical to pay fines.”
Greenpath Recovery, Inc.

“Everyone brings PCR to the table but when you tell them how much it is they don't always want to pay for it. The percentage helps bring this cost down. We do 25% to 60%.”
MDT

“Supply is going to dwindle as time goes on and what's going to end up happening is the materials are going to be highly contaminated and only be used for commodity applications.”
Kal-Polymers

“Finding enough clean supply from post-consumer for food packaging. We could get it from post-industrial waste, but getting it from post-consumer is a bit more difficult. There are a lot of contaminated materials that stay contaminated.”
Custom Polymers, Inc.

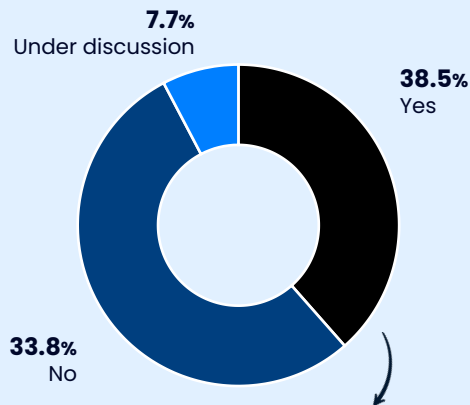
 Represents the number of times it was mentioned by interviewed company representatives.

Partnerships

Currently, half of the interviewed companies are not working with partners but a certain portion of them would be willing to establish future partnerships if there is demand and supply.



Are you currently working with partners?



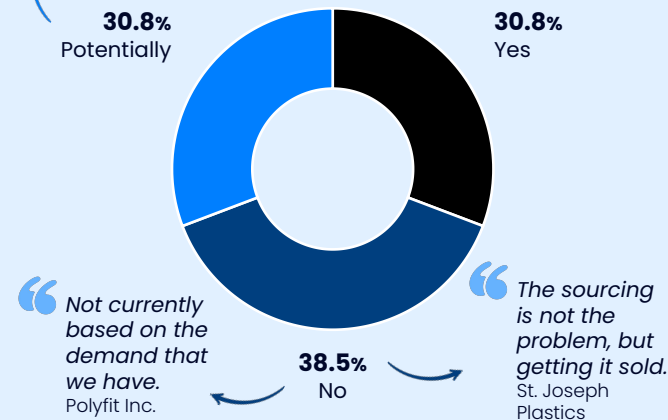
*"We have **Procter and Gamble**, who invented this technology, so they assist. We have joint ventures with other companies as well for design and scale up.*
PureCycle Technologies LLC.

*"We're working with **collections**, but not outside investors.*
KW Plastics

"Absolutely, we need help with FDA approval, but mostly we need partnerships for guaranteed future orders.
Greenpath Recovery, Inc.

"If we had the demand for it, then maybe.
Kal-Polymers

*"Yes, we really **lack the supply** at this time. We have capacity, but there is not a consistent amount of supply.*
Firstar Fiber, Inc.



"Not currently based on the demand that we have.
Polyfit Inc.

"The sourcing is not the problem, but getting it sold.
St. Joseph Plastics

Would your company be able to produce more PCR PP with the right partnership and funds?

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