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Reshoring and infrastructure boom drive increased scrap demand

by MAURA KELLER
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For decades, the U.S. scrap recycling industry has operated within a global marketplace, balancing domestic consumption with export opportunities. Today, however, a powerful combination of manufacturing reshoring, infrastructure investment and sustainability initiatives are reshaping the landscape. Increasingly, domestic scrap is being viewed not simply as a commodity, but as a strategic resource critical to supporting American manufacturing, construction and energy development.

As manufacturers bring production back to the United States and federal investments fuel large scale infrastructure projects, demand for ferrous and nonferrous scrap is rising. At the same time, recyclers, processors, mills and foundries are adapting to changing quality requirements, supply chain dynamics and long-term market expectations.

Manufacturing Returns Home

The movement to reshore manufacturing operations has become one of the most significant factors influencing scrap demand. Brad Serlin, president of United Scrap Metal, said investments in domestic metal production are helping support supply chains that increasingly require shorter lead times and greater reliability.

“The reshoring impact continues to present an optimistic future for the scrap recycling industry,” Serlin said. “Investments in domestic metal production, to fulfill the needs of reshoring by having the ability to create finished sheet, plate, bar, tube and extrusions, is a critical factor within the supply chain.”

According to Serlin, automotive, electrical and housing-related supply chains are among the sectors driving the transition from overseas production to domestic manufacturing.

Loretta Clark, vice president of North America Metals & Minerals Research at Industrial Info Resources, believes the shift extends beyond simply relocating factories.

“Reshoring is fundamentally shifting domestic scrap from a traditional export commodity to a high-value domestic asset,” Clark said. “As manufacturing capacity returns to the U.S., we are seeing a structural push for localized closed-loop recycling.” Clark noted that industries including electric vehicles, advanced electronics, data centers, and heavy equipment manufacturing are creating stronger regional demand for recycled metals.

“This localized manufacturing boom is creating a tighter domestic loop where industrial scrap is rapidly absorbed back into regional supply chains rather than being shipped overseas,” Clark said.

While reshoring has generated substantial investment activity, recent



A powerful combination of manufacturing reshoring, infrastructure investment and sustainability initiatives are reshaping the U.S. scrap recycling industry.

manufacturing construction spending has experienced some moderation. Brian Strawberry, chief economist with FMI Corporation, said the manufacturing construction boom that occurred between 2022 and 2024 has cooled somewhat, but long-term fundamentals remain favorable.

“Manufacturing construction is in decline after the 2022 to 2024 reshoring and CHIPS Act surge, but the long-run setup for expanding investment is still in place,” Strawberry said.

He pointed to weakness in semiconductor and electric vehicle battery investments during the past year, while noting that sectors such as chemicals and food and beverage manufacturing continue to support spending.

“We expect semiconductor and EV investment to resume and accelerate,” Strawberry said. All of these sectors impact the need for domestic scrap.

Infrastructure Creates a Strong Consumption Base

While reshoring is boosting manufacturing demand, federal infrastructure spending may be creating an even more durable source of metal consumption.

Recent investments in transportation systems, energy infrastructure, water systems and public works projects are generating significant demand for steel, copper, aluminum and other metals. Because modern steelmaking increasingly relies on recycled feedstock, those investments are directly benefiting the scrap industry.

“The essential investment in our aging infrastructure is creating a robust demand for red metals, followed by a slower-to-emerge appetite for aluminum, stainless steel and steel,” Serlin said. He noted that scrap’s energy-saving advantages make it especially attractive as manufacturers seek to lower costs and reduce greenhouse gas emissions.

“The cost benefit of scrap achieved through energy savings is essential as the demand curve rises, coupled with the focus on sustainability,” Serlin said.

Clark agreed that infrastructure spending is creating a powerful demand floor for recycled metals. “Federal infrastructure funding has created a massive, sustained consumption floor for metals,” Clark said. “Heavy structural projects, like bridge rehabilitations, highway expansions, and grid modernizations, rely on structural steel and copper wiring.”

She added that because most new domestic steelmaking capacity relies on electric arc furnace technology, which primarily consumes recycled scrap, infrastructure spending directly supports scrap demand.

“Because the vast majority of new domestic steel capacity comes via Electric Arc Furnaces, which are powered primarily by recycled scrap, this infrastructure push directly accelerates domestic scrap consumption,” Clark said.

According to Strawberry, energy-related infrastructure projects may be among the long-term drivers of metal demand.

“Infrastructure is where we expect the most durable steel demand over our forecast period,” Strawberry said. He pointed to substantial projected growth in power construction, ongoing utility investments, water infrastructure upgrades and bridge rehabilitation projects.

“EEI member utilities have planned more than \$1.1 trillion in capital spending through 2029,” Strawberry said.

In addition, new domestic-content requirements and trade policies are reinforcing demand for American-produced materials.

“The Federal Highway Administration’s manufactured-products rule moves to a 55 percent domestic component

See METAL RECYCLING, Page A4

American Recycler

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Texas firm wins patent to turn mattress foam into reusable materials



The U.S. Patent and Trademark Office recently issued a patent for a thermochemical conversion process developed by Houston-based Edge Global Innovation Inc., marking a major step toward converting discarded and industrial scrap foam into high value recycled materials.

The newly patented process uses a method known as “vitrimerization” to convert polyurethane foam waste into reusable materials. Edge Global Innovation is commercializing the process through a subsidiary, VitriCycle LLC.

Unlike chemical recycling approaches, chief executive officer, Vahid Serajian, said the VitriCycle process is designed to be energy-efficient and does not require additional solvents or catalysts.

“Turning old mattress foam into synthetic leather products, shoe soles, phone cases, key rings, bumpers, gaskets and other everyday products is the future we are building with VitriCycle,” said Serajian.

The Mattress Recycling Council funded an early portion of the research as part of its mission to develop new markets for post-consumer polyurethane mattress foam. The VitriCycle process is the first MRC-backed research project to earn a patent. There are six other patent applications pending based on MRC research.

“We are excited to have played a supporting role in developing this technology at an early stage and are thrilled to see it advancing to adoption in new

markets,” said Mike O’Donnell, chief operating officer of the Mattress Recycling Council.

VitriCycle’s core technology produces pellets from scrap foam for injection molding, suitable for rubber-like applications such as soft plastic components, footwear products, phone cases, industrial gaskets and automotive accessories.

The same process can also be used to create synthetic leather sheets for wallets, purses, furniture, accessories, promotional products, craft projects and other sustainable design applications. VitriCycle is marketing this product line as “KindHide”, Serajian explained, as a kinder alternative to cowhide.

VitriCycle sees strong market potential from manufacturers, brands, and designers seeking U.S.-made recycled materials, sustainable leather alternatives, recycled polyurethane sheets, and circular materials for consumer and industrial products.

Because the materials are produced from recycled foam in the United States, VitriCycle products may also help manufacturers reduce exposure to virgin resin pricing, oil price volatility, tariffs, and overseas supply chain risks.

The VitriCycle technology is available to manufacturers through licensing agreements as well, offering a way for foam manufacturers, mattress producers, furniture manufacturers, automotive suppliers and mattress recyclers to create value from scrap polyurethane foam.

City of Pittsburgh receives grant to modernize recycling

The City of Pittsburgh, Pennsylvania, has secured a \$1.66 million grant to enhance recycling and yard waste services across the city.

Funded through the U.S. Environmental Protection Agency’s Solid Waste Infrastructure for Recycling program, the grant will support upgrades to environmental services operations, including investments in new vehicles and expanded curbside yard waste collection.

The funding will also improve

Department of Public Works recycling drop-off sites with new pavement, fencing and two additional cardboard compactors.

To strengthen site safety and monitoring, security cameras will be installed at the Environmental Services headquarters in the Strip District and at other city locations.

City officials say the investments will help Environmental Services advance Pittsburgh’s long-term sustainability and waste reduction goals.

TerraCycle US Inc. reports strong 2025 financial results

TerraCycle US Inc., the U.S. subsidiary of TerraCycle, Inc., an international leader in innovative sustainability solutions, announced its financial results for the full year ending December 31, 2025.



TerraCycle US has nearly doubled net revenue over the past five years, growing from \$24.7 million in 2020 to \$47.6 million in 2025, a 93 percent increase achieved while sustaining more than a decade of consecutive profitability. The company closed 2025 with \$22.1 million in gross profit.

“Our 2025 results reflect the strength and resilience of our business,” said Tom Szaky, founder and chief executive officer of TerraCycle. “After more than two decades of leadership in sustainable innovation, we continue to expand our capabilities and deepen our partnerships. The growth and profitability we’ve sustained

year after year are the product of a strategy that works, and a mission that creates real value for people and the planet.”

2025 Financial Highlights

- Net sales increased to \$47.6 million in 2025, reflecting nearly 93 percent growth over the past five years. The growth was driven by continued demand for TerraCycle’s recycling programs and solutions, contribution from the September 2024 acquisition of North Coast Recycling, and ongoing expansion of commercial and e-commerce offerings.
- Gross profit reached \$22.1 million in 2025, with a gross margin of 46.4 percent, reflecting operational efficiencies and continued innovation in sorting and processing hard-to-recycle materials.
- Selling, general and administrative (SG&A) expenses totaled \$17.9 million in 2025, representing 37.8 percent of sales while supporting a meaningfully larger revenue base. Income from operations reached \$4.1 million in 2025.

New Recycling Convenience Center opens in Worthington with funding from SWACO



Officials from the City of Worthington and the Solid Waste Authority of Central Ohio (SWACO) formally opened a new Recycling Convenience Center at 380 Highland Avenue. The facility was funded in large part by a nearly \$30,000 grant from SWACO, and will be a year-round collection point for residents to drop off harder-to-recycle items that can’t be placed in a curbside recycling cart. The new facility is located adjacent to the

city’s Service and Engineering building, and is open to the public for the responsible disposal and recycling of materials such as electronics, styrofoam, car batteries, anti-freeze and motor oil, and food scraps.

“Worthington strives to be a model for environmental stewardship, and this new convenience center provides an enhanced opportunity for members of our community to expand their recycling efforts close to home. We appreciate SWACO’s partnership and financial support in this endeavor,” said Worthington city manager, Robyn Stewart.

Recology Teamsters ratify contract

Over 140 members of Teamsters Local 350 at Recology have voted overwhelmingly to ratify a new five year contract that delivers gains in wages, retirement benefits and workplace protections.



The agreement includes a 25 percent wage increase, enhanced retirement benefits and protections against surveillance by cameras in and around trucks.

“This is a huge win for all of us,” said Brian Marshall, a sanitation driver and bargaining committee member. “Securing a strong contract like this makes all the difference in the world so that we can

provide for our families and stay safe on the job. We clock in to work every day to keep our communities clean and healthy. This contract delivers the compensation and respect we have earned.”

Recology Teamsters service hundreds of commercial and residential routes collecting waste, recycling and compost throughout San Mateo County, including communities like Belmont, Burlingame, East Palo Alto, Foster City, Menlo Park, Redwood City, San Carlos, San Mateo, Hillsborough and part of the West Bay Sanitary District.

Teamsters Local 350 represents members in the public sector and solid waste, recycling and linen industries, and in San Francisco, San Mateo, Santa Clara, and San Benito Counties.

Rumpke facilities earn Gold status for glass recycling efforts



The Glass Recycling Foundation (GRF) recognized Rumpke Waste & Recycling’s Cincinnati, Columbus and Dayton, Ohio facilities for their efforts to successfully capture, clean and produce high-quality glass for use in the manufacturing of new bottles and products.

The three state-of-the-art recycling facilities all received Gold level status, the highest designation within the Glass Recycling Foundation’s Certification Program. Only five recycling facilities in the nation earned this status.

Across the U.S., only about one-third of glass is recycled, largely because of contamination and processing challenges. GRF’s Certification Program addresses that gap by recognizing and elevating recycling facilities that are getting glass recycling right.

“These facilities prove that better glass recycling is possible today,” said Scott DeFife, GRF board president. “With the right systems, more glass stays in the recycling loop, and our goal is to scale that success across the country.”

Through an independent review, GRF evaluates facilities on how effectively they capture and clean glass and whether the material is suitable for use in new products. Those that meet the highest standards earn Gold level certification. Rumpke demonstrated leadership by maintaining high standards across multiple locations.

“This recognition reflects Rumpke’s commitment to recycling and ensuring the efforts made by our customers to reduce waste are fulfilled,” said Bill Rumpke Jr., president and chief executive officer. “As a recycling leader, Rumpke takes great pride in being one of the first waste companies to develop a glass recycling process, and we continue to invest in this process so we can recover even more glass and feed our regional end markets for years to come.”

In 2025, Rumpke recycled more than 1.4 billion pounds of material across its network of recycling facilities. Glass made up nearly 10 percent of the material. Rumpke partners with Midwest end users to convert glass into new glass bottles and jars as well as fiberglass insulation.

Nucor reports increased earnings for the first quarter of 2026

Nucor Corporation announced consolidated net earnings attributable to Nucor stockholders of \$743 million, or \$3.23 per diluted share, for the first quarter of 2026. Nucor reported consolidated net earnings attributable to Nucor stockholders in the fourth quarter of 2025 of \$378 million, or \$1.64 per diluted share (adjusted net earnings of \$400 million, or \$1.73 per diluted share). Nucor reported net earnings attributable to Nucor stockholders in the first quarter of 2025 of \$156 million, or \$0.67 per diluted share (adjusted net earnings of \$179 million, or \$0.77 per diluted share).

“Nucor teammates delivered a strong start to 2026, with our steel mills segment achieving a new quarterly shipment record,” said Leon Topalian, Nucor’s chair and chief executive officer. “All three of our operating segments reported sequential earnings growth, driven by strong demand across key end markets, growing contributions from recent capital investments, and federal trade policies that continue to reduce the flood of unfairly traded imports into the United States.”

Analysis of First Quarter of 2026 Results Compared to the Fourth Quarter of 2025

The increase in first quarter earnings was driven primarily by the increase in earnings in the steel mills segment, which experienced higher average selling prices and volumes across all product groups. The steel products segment had improved earnings due to increased volumes and stable average realized pricing. The raw materials segment had higher earnings in the first quarter due to increased average selling prices and volumes.

Financial Strength

At the end of the first quarter of 2026, Nucor had \$2.48 billion in cash and cash equivalents and short-term investments on hand. The Company’s \$2.25 billion revolving credit facility remains undrawn and does not expire until March 2030. The Company continues to have the strongest credit ratings in the North American steel sector (A-/A-/A3) with stable outlooks at Standard & Poor’s, Fitch Ratings and Moody’s, respectively.

Commitment to Returning Capital to Stockholders

During the first quarter of 2026, Nucor repurchased approximately 0.7 million shares of its common stock at an average price of \$175.19 per share. Nucor has returned approximately \$250 million to stockholders in the form of share repurchases and dividend payments year-to-date. On February 20, 2026, Nucor’s Board of directors approved a new share repurchase program under which Nucor is authorized to repurchase up to \$4.00 billion of its common stock and terminated any previously authorized share repurchase programs. As of April 4, 2026, Nucor had approximately \$3.97 billion remaining for repurchases under its authorized share repurchase program. This share repurchase authorization is discretionary and has no scheduled expiration date.

On February 20, 2026, Nucor’s Board of directors declared a cash dividend of \$0.56 per share. This cash dividend is payable on May 11, 2026, to stockholders of record as of March 31, 2026 and is Nucor’s 212th consecutive quarterly cash dividend.



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Metal recycling

■ Continued from Page A1

threshold on October 1, 2026,” Strawberry said. “Both reinforce demand for domestic steel.”

Quality Requirements Continue to Evolve

As domestic manufacturing expands, mills and foundries are becoming selective about the scrap they purchase.

“There is a desire by metal producers to leverage technological advancements to produce their respective metals in a more cost-effective manner,” Serlin said.

He noted that technologies such as optical sorting, metallurgical testing and artificial intelligence are enabling mills to process lower-grade materials that previously may have been exported.

“The more advanced mills and foundries are seeking to collaborate with scrap suppliers to achieve success,” Serlin said.

Clark said the industry’s transition toward advanced electric arc furnace steel-making has created a growing preference for higher-quality feedstock.

“Absolutely,” Clark said when asked whether scrap specifications are changing. “The expansion of advanced domestic EAF steelmaking and advanced nonferrous manufacturing has created a flight to quality.”

According to Clark, mills increasingly seek low-residual, high-purity materials such as prime industrial bundles and busheling. Demand is also rising for clean copper and aluminum grades needed in renewable energy systems, data centers, and advanced manufacturing applications.

This trend is encouraging processors to invest in more sophisticated sorting and separation technologies capable of producing cleaner, melt-ready materials.

Competition for Scrap Intensifies

As domestic consumption grows, competition for available scrap supplies is becoming increasingly intense.

“The increasing demand and, most importantly, forecasted long-term needs are creating a desire to partner with larger, more sophisticated scrap recyclers,” Serlin said. He noted that manufacturers require reliable access to quality raw materials and increasingly seek suppliers capable of providing consistent volumes across multiple geographic regions.

“The worst reality for a metal producer is running too lean on raw materials,” Serlin said. Clark added that growing domestic demand is reshaping traditional scrap supply chains.

“We are seeing intense regionalization and a wave of vertical integration,” said Clark, who further pointed out that steel-makers are increasingly acquiring scrap processing businesses to secure access to feedstock supplies. Material that historically moved toward export terminals is now being redirected to domestic mills.

“Historically, excess scrap was moved to coastal ports for export,” Clark said. “Today, that material is being pulled inland to feed domestic mills, completely altering traditional freight lanes.”

The shift is creating additional pressure on transportation networks already dealing with freight constraints and rising costs.

Challenges Remain

Despite strong demand fundamentals, the industry faces several obstacles that could limit its ability to meet future requirements. Serlin pointed to inflation,

land-use pressures, logistics infrastructure and workforce development as ongoing concerns.

“The recycling industry is consistently challenged by inflationary costs, gentrification of zoned areas to operate and an aging logistics infrastructure,” Serlin said. He emphasized that people remain the industry’s most valuable asset.

“Labor is a key ingredient to a successful recycling operation,” Serlin said. “Everything ties back to people and culture as the best machinery.”

Clark identified permitting and infrastructure constraints as significant barriers to expansion.

“While the desire to expand processing capacity is high, securing environmental and zoning permits for new or expanded scrap yards is taking longer than ever,” Clark said. She also cited shortages of commercial drivers, heavy-equipment mechanics and other specialized workers, along with rising equipment costs and freight congestion.

“When you overlay high capital equipment replacement costs and localized rail and freight congestion, scaling physical processing throughput quickly to meet sudden demand surges becomes a serious operational challenge,” Clark said.

Sustainability Adds Another Layer

The increasing emphasis on sustainability is also influencing scrap procurement strategies.

“The metal sector has shifted its focus away from simply producing metal,” Serlin said. “They are now considering how metal can be procured in a fashion that supports the carbon footprint.” He noted that companies are increasingly evaluating suppliers through audits and certifications while exploring transportation alternatives

such as rail and barge to reduce emissions.

Clark said environmental goals are becoming inseparable from raw-material sourcing decisions.

“Scope 3 emissions targets are pushing steelmakers and foundries to maximize scrap use because recycled metal dramatically lowers their carbon footprint compared to virgin ore,” Clark said. However, she cautioned that supplies of premium scrap remain limited.

“Prime scrap is finite,” Clark said.

To address those constraints, many steelmakers are investing in direct reduced iron and hot briquetted iron facilities that can supplement lower-quality scrap while maintaining product quality.

A Structural Shift for the Industry

Industry experts generally agree that current market changes represent more than a temporary demand cycle.

“The demand surge will be the new norm,” Serlin said. “Mining isn’t a practical nor cost-effective way to produce enough raw material to keep furnaces filled in the U.S.”

Clark echoed that assessment. “This is absolutely a structural shift, not a temporary cyclical spike,” she said. According to Clark, reshoring, domestic-content requirements, decarbonization goals and infrastructure spending have fundamentally altered the role of scrap within the U.S. economy.

“Domestic scrap is now viewed as a strategic national asset rather than a volatile baseline commodity,” Clark said.

For scrap recyclers, the message is clear – domestic demand is becoming increasingly important, and investments in processing, technology, logistics, and workforce development will be essential to capturing future opportunities.

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LENGTH	42'
WEIGHT	61,000 LBS.
HEIGHT	13'3"

HYDRAULICS:	
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Plastic Recycling and Omni to scale ASR plastics recovery



End-of-Life Vehicle (ELV) processing line going through size reduction, metal removal, density separation, and final electrostatic separation.

Omni, North America’s largest processor of scrap metals and recycling company, and Plastic Recycling, Inc. (PRI), a vertically integrated plastics recycler and compounder based in Indianapolis, Indiana, announced a mutual collaboration to scale the domestic supply chain for automotive shredder residue (ASR) plastic recovery – from end-of-life vehicle waste through to finished, automotive-grade recycled compounds.

PRI has already launched ASR-derived recycled compounds in the domestic market, with multiple automotive OEMs and Tier 1 suppliers currently in the commercial pipeline. The compounds are produced through PRI’s established processing and compounding infrastructure, backed by ISCC PLUS Mass Balance certification and 38 years of plastics recycling expertise.

What this collaboration adds is scale. Omni generates and controls significant ASR volumes that historically lack viable commercial recovery options. PRI’s proven process can now convert those volumes into finished recycled pellets ready for automotive applications.

Scaling a proven process into a national supply chain

Under this collaboration, Omni will serve as a primary feedstock source for PRI’s ASR-to-pellet program, enabling a step-change in available supply to meet accelerating OEM and Tier 1 demand. Together, the companies are building what is currently an unmatched domestic supply chain – traceable from end-of-life vehicle through to finished compound – at a moment when that traceability carries direct value in meeting global automotive recycling mandates.

The collaboration also encompasses active trials with AI sorting technology partners aimed at improving plastic recovery yields from ASR streams. Higher sortation accuracy and lower contamination rates directly improve the economics of the process, making high-volume commercial supply increasingly viable and cost-competitive.

Circularity value for the metals recycling supply chain

For Omni, the impact of this partnership is direct and measurable. ASR plastic, historically a low-value byproduct, now has a viable beneficial use in a certified

circular supply chain. As sustainability reporting requirements expand across the metals recycling and scrap processing industry, the ability to demonstrate quantifiable downstream material circularity is an increasingly important part of how companies like Omni and PRI communicate their sustainability performance to customers, regulators, and stakeholders.

Regulatory tailwind: EU ELV compliance

The urgency behind this partnership is driven in part by the EU End-of-Life Vehicle (ELV) regulation, which is placing direct compliance pressure on global automakers and their supply chains to demonstrate traceable, commercially sourced post-consumer recycled content. Domestic supply chains capable of meeting that demand at scale are scarce. The Omni–PRI collaboration is designed to be that supply chain.

“We’ve already proven the process works – ASR-derived compounds are in the domestic market today. What Omni brings is the feedstock volume to move this from a proven program to a scaled supply chain. The automakers and Tier 1 suppliers who need a domestic, traceable, ELV-compliant source of recycled material now have somewhere to go. That’s what this collaboration creates,” said Brandon Shaw, president, Plastic Recycling, Inc.

“This collaboration tackles a longstanding challenge in automotive recycling by scaling a solution for ASR plastics. By combining Omni’s significant ASR volumes with PRI’s proven processing capabilities, we’re creating a traceable circular supply chain that delivers real environmental value while meeting OEM and Tier 1 sustainability and compliance needs,” said Matt Bell, vice president of metals recycling, Steel Dynamics and president, Omni.”

Next Steps

Both companies are actively engaged in discussions on a commercial supply arrangement and expect to provide further details on volumes, AI sorting technology deployment, and customer pipeline in the coming months. Automotive OEMs, Tier 1 suppliers and supply chain partners interested in sourcing ASR-derived recycled compounds are encouraged to reach out directly.

METALS

Crude steel production drops

World crude steel production for the 69 countries reporting to the World Steel Association (worldsteel) was 153.4 million tonnes (Mt) in April 2026, a 1.9 percent decrease compared to April 2025.

Crude steel production by region

Africa produced 2.1 Mt in April 2026, up 11.5 percent on April 2025. Asia and Oceania produced 114.2 Mt, down 1.3 percent. The EU (27) produced 11.0 Mt, down 1.8 percent. Europe, Other produced 3.6 Mt, up 4.2 percent. The Middle East produced 3.7 Mt, down 27.6 percent. North America produced 9.4 Mt, up 6.9 percent. Russia & other CIS + Ukraine produced 6.0 Mt, down 13.4

percent. South America produced 3.4 Mt, up 3.1 percent.

Top 10 steel-producing countries

China produced 83.6 Mt in April 2026, down 2.8 percent on April 2025. India produced 13.8Mt, up 3.9 percent. The United States produced 7.2 Mt, up 9.4 percent. Japan produced 6.6 Mt, up 0.3 percent. South Korea produced 5.2 Mt, up 4.8 percent. Russia is estimated to have produced 5.0 Mt, down 12.4 percent. Turkey produced 3.3 Mt, up 9.4 percent. Germany produced 3.2 Mt, up 9.5 percent. Brazil is estimated to have produced 2.7 Mt, up 2.8 percent. Vietnam is estimated to have produced 2.1 Mt, up 4.0 percent.

Top steel-producing countries				
	Mar 2026 (Mt)	% change Mar 26/25	Jan-Mar 2026 (Mt)	% change Jan-Mar 26/25
China	83.6	-2.8	331.1	-4.1
India	13.8	3.9	58.7	9.4
United States	7.2	9.4	28.1	6.6
Japan	6.6	0.3	26.7	-1.2
South Korea	5.2	4.8	21.0	2.5
Russia (e)	5.0	-12.4	20.6	-12.0
Turkey	3.3	9.4	13.0	6.3
Germany	3.2	9.5	12.5	9.1
Brazil (e)	2.7	2.8	10.8	-1.6
Vietnam (e)	2.1	4.0	8.5	8.4

e-estimated. Ranking of top 10 producing countries based on year-to-date aggregate

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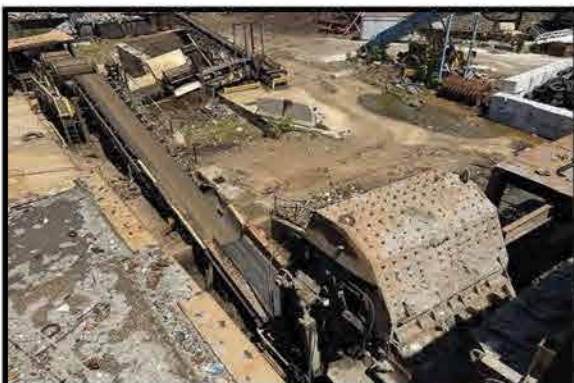
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METALS

Aurubis achieves improved quarterly results

Aurubis AG, a global provider of nonferrous metals and one of the largest copper recyclers worldwide, is raising its forecast for the current 2025/26 fiscal year.

The multimetal supplier now anticipates an operating EBT of between €425 million and €525 million (previously: €375–475 million) and an operating ROCE of between 10 and 12 percent (previously 9 to 11 percent). This increase is based on an improved market outlook and the accompanying higher anticipated result. Key drivers of the increase include sustained high metal prices, improved revenue expectations from recycling material processing, and anticipated higher revenues from sulfuric acid sales in the second half of the fiscal year.

Given the usual fluctuations in working capital with high metal prices, Aurubis also continues to expect net cash flow to be above the prior-year level and free cash flow break-even (before dividend) at a minimum.

The multimetal company closed out Q2 on March 31, 2026 with a higher result: Preliminary operating earnings before taxes amounted to €121 million, a 15 percent increase over the prior quarter (Q1 2025/26: €105 million), while operating EBITDA rose to €187 million (previous quarter: €164 million).

These stable mid-year results for the current fiscal year clearly highlight



Aurubis’ ongoing success. The preliminary operating earnings before taxes (EBT) of €226 million after the first 6 months put the multimetal supplier on par with the previous year (€229 million). Accordingly, operating EBITDA came in at €351 million, roughly 3 percent higher than the prior-year figure (€341 million).

A number of positive factors provided an uplift to the preliminary H1 2025/26 results, including a markedly higher year-over-year metal result due in part to increased metal prices, especially for precious metals, coupled with slightly higher earnings from the processing of recycling material. Aurubis also profited from sulfuric acid revenues that exceeded the high prior-year level driven by higher sales volumes, and a slight rise in revenues from copper product sales.

These tailwinds more than compensated for result-dampening factors, such as considerably lower treatment and refining charges with higher year-over-year concentrate throughput and increased scheduled depreciation for strategic projects.



Scrap Metals

MarketWatch



Commodity		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5
FERROUS						
#1 Bushelings	per gross ton	\$412.00	\$411.00	\$408.00	\$410.00	\$420.00
#1 Bundles	per gross ton	392.00	391.00	382.00	390.00	400.00
Structural	per gross ton	375.00	373.00	373.00	375.00	385.00
#1 & #2 Mixed Steel	per gross ton	295.00	297.00	295.00	301.00	335.00
Crushed Auto Bodies	per gross ton	212.00	218.00	215.00	220.00	225.00
Shredded Auto Scrap	per gross ton	416.00	410.00	415.00	415.00	425.00
NON FERROUS						
#1 Copper Bare Bright	per pound	6.20	5.70	5.75	5.95	6.00
#2 Copper Wire & Tubing	per pound	6.00	5.50	5.55	5.75	5.80
Aluminum Cans	per pound	1.00	.98	1.00	.99	1.00
Al/Cu Radiators	per pound	2.95	2.89	2.95	2.99	3.10
Aluminum Radiators	per pound	.48	.47	.41	.38	.40
Heater Cores	per pound	1.51	1.47	1.50	1.49	1.55
Stainless Steel	per pound	.69	.68	.67	.68	.68

All prices are expressed in USD. Printed as a reader service only.

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METALS

Steel imports up 5.9 percent

Based on preliminary Census Bureau data, the American Iron and Steel Institute (AISI) reported that the U.S. imported a total of 1,874,000 net tons (NT) of steel in April 2026, including 1,378,000 NT of finished steel (up 5.9 percent and 5.5 percent, respectively, vs. March 2026). Total and finished steel imports are down 29.5 percent and 30.5 percent, respectively, year-to-date vs. 2025. Over the 12-month period May 2025 to April 2026, total and finished steel imports are down 21.5 percent and 25.8 percent, respectively, vs. the prior 12 month period. Finished steel import market share was an estimated 16 percent in April and is estimated at 15 percent over the first four months of 2026.

Key steel products with a significant import increase in April compared to

March are tin plate (up 126 percent), sheet and strip all other metallic coatings (up 56 percent), reinforcing bars (up 46 percent), cold rolled sheets (up 39 percent) and hot rolled bars (up 30 percent).

In April, the largest suppliers were South Korea (291,000 NT, unchanged vs. March), Canada (268,000 NT, down 6 percent), Brazil (215,000 NT, down 26 percent), Mexico (187,000 NT, up 33 percent) and Vietnam (123,000 NT, down 31 percent). Over the 12-month period May 2025 to April 2026, the largest suppliers were Canada (3,463,000 NT, down 45 percent compared to the previous 12-months), Brazil (3,297,000 NT, down 27 percent), South Korea (2,878,000 NT, up 2 percent), Mexico (2,266,000 NT, down 33 percent) and Vietnam (1,071,000 NT, down 11 percent).

U.S. Imports of Steel Mill Products by Country of Origin (thousands of net tons)									
U.S. Imports of Steel Mill Products by Country of Origin (thousands of net tons)									
COUNTRY	APR. 2026 PRELIM	MAR. 2026 FINAL	% VAR. APR VS. MAR.	YTD 2026 (4 MON.)	YTD 2025 (4 MON.)	% VAR. 2026 VS. 2025	MAY 2025 TO APR. 2026	MAY 2024 TO APR. 2025	% VAR.
Canada	268	285	-6.0%	996	2,057	-51.6%	3,463	6,266	-44.7%
Brazil	215	291	-26.1%	930	1,759	-47.1%	3,297	4,506	-26.8%
South Korea	291	292	-0.4%	1,173	957	22.6%	2,878	2,828	18%
Mexico	187	140	33.3%	738	1,295	-43.1%	2,266	3,379	-33.0%
Vietnam	123	177	-30.6%	437	235	86.2%	1,071	1,202	-10.9%
Japan	74	77	-3.2%	335	376	-11.0%	1,034	1,160	-10.9%
Taiwan	100	82	21.5%	290	386	-24.8%	998	1,079	-7.6%
Germany	75	38	98.4%	216	420	-48.5%	924	1,200	-23.0%
Turkey	21	58	-64.0%	206	156	32.0%	598	388	54.2%
India	45	64	-29.2%	193	172	12.7%	574	354	62.3%
Netherlands	36	18	97.3%	104	181	-42.5%	449	629	-28.6%
United Arab Emir.	15	49	-68.4%	119	123	-3.4%	421	410	2.5%
China	49	24	100.8%	124	170	-26.9%	396	541	-26.7%
Romania	43	3	1613.9%	134	177	-24.5%	363	480	-24.4%
Argentina	30	0	N/A	90	1	N/A	317	32	900.0%
All Other	300	170	76.8%	885	1,424	-37.9%	3,275	3,968	-17.5%
Total	1,874	1,769	5.9%	6,972	9,889	-29.5%	22,324	28,422	-21.5%
memo EU-27	310	160	93.3%	937	1,539	-39.1%	3,277	4,467	-26.6%

Sibanye-Stillwater advances leadership in precious metal recycling

Following the successful acquisitions of Reldan and Reldan Mexico, and Metallix, Sibanye-Stillwater has unified these industry-leading businesses with its Columbus autocatalyst recycling operations to form a single, integrated global recycling platform.

This strategic alignment positions Sibanye-Stillwater as a major force in precious metal recycling and refining.

Scale, capability and expertise

The unified recycling business brings together:

- Advanced and safe precious metal recovery and refining capabilities powered by leading technologies and deep technical know-how across complex materials and processing streams
- World-class analytical laboratories

delivering assay accuracy, precision, transparency, and customer confidence

- A growing international footprint, with refining operations in the United States and India, processing capabilities in Asia, and commercial presence across key global markets
- Decades of combined experience across industrial, electronic, jewelry, and autocatalyst recycling streams
- Strong downstream partnerships and long-standing customer relationships that serve as strategic assets and key enablers across the value chain

Together, these strengths enable Sibanye-Stillwater to deliver high-performance, end-to-end recycling solutions at scale, while safely processing increasingly complex materials with high recovery efficiencies.

PAPER

Recycling access reaches 20 percent of U.S. population for paper cups



In a landmark achievement for sustainability, the Foodservice Packaging Institute has propelled U.S. recycling access for paper cups to a new high: 20 percent of the nation’s population now lives in communities where both single-sided (hot drink) and double-sided (cold drink) paper cups are accepted for recycling.

The 20 percent figure was compiled by Resource Recycling Systems (RRS) through reviews of community recycling program guidance and industry announcements. A 2015-16 study commissioned by the Sustainable Packaging Coalition (SPC) and the Foodservice Packaging Institute (FPI), and conducted by RRS, estimated that only five percent of the U.S. population had access to residential recycling programs that accepted paper cups. This progress reflects growing recognition that used paper cups are a valuable material stream that can be recovered and transformed into new paper products like paperboard, paper towels, toilet paper and paper cups.

“Expanding paper cup recycling access in the U.S. is a direct response to growing consumer demand for circular packaging solutions,” said Robbert Rietbroek, president and chief executive officer of Graphic Packaging International. “Investments across the recycling value chain, including Graphic Packaging’s advanced fiber recovery technology, are helping turn used paper cups into new packaging for many leading household brands.”

FPI’s Community Partnership program is a major contributor to reaching this milestone. The program, established in 2017, works to expand access to recycling for takeout containers and other foodservice packaging, like paper cups. To date, over 30 communities have partnered with FPI to engage in productive conversations to ensure haulers, material recovery facilities (MRF) and end markets could accept and process paper cups. The polycoat lining on the paper cups was seen as a barrier to recycling;

however, paper mills have invested in testing and technology and can now separate the lining and recover valuable fiber. These efforts, along with conducting community outreach and education, have helped over 8.9 million households across the U.S. to recycle more and recycle right.

In 2018, FPI founded the Paper Cup Alliance (PCA) to accelerate the adoption of paper cup recycling in the U.S. Founding members of PCA, including Clearwater Paper, Dart Container, Graphic Packaging International, Huhtamaki, Novolex, Seda, Smurfit Westrock and Sustana, work to align supply chain partners, develop end markets for recycled materials and engage stakeholders to increase recovery. This engagement resulted in a joint declaration of paper cup acceptance by major paper mill groups, growing North American end markets from four in 2017 to 35 today – representing 75 percent of the North American mixed paper demand.

Recent announcements from major recycling industry stakeholders have also helped to reach the 20 percent milestone.

- WM, Rumpke Waste & Recycling, GFL Environmental, Casella Waste Systems and other haulers/recyclers, declared the acceptance of paper cups for recycling.
- ReMA updated inbound residential single stream and dual stream ISRI specification to include paper cups.
- American Forest & Paper Association (AF&PA) made a statement on the recyclability of paper cups.

For communities that do not currently accept paper cups for recycling, local leaders are encouraged to engage with solid waste directors, material recovery facility operators and end markets/paper mills. FPI offers a value chain checklist to help communities get started. Working together, stakeholders can explore local processing capabilities and identify pathways to add paper cups to recycling programs.



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OPTIONAL

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WASTE

NYC Sanitation, Sanitation Foundation unveil five new ‘trucks of art’



The New York City Department of Sanitation and its nonprofit partner the Sanitation Foundation unveiled the latest round of Trucks of Art, a unique art project that challenges artists to beautify five 23-ton collection vehicles with hand-painted designs. The selected artists used their nearly 400 square feet of “canvas” to highlight cleanliness, sustainability and New York’s Strongest, the 7,500 uniformed men and women who keep New York City clean, safe and healthy.

The five featured artists were chosen from among more than 400 submissions, which were evaluated by a team of DSNY personnel, Sanitation Foundation staff and board members, as well as special guests Nick Heller (better known online as NY Nico) and Emmy Award-winning host, producer and author, Andy Cohen. The committee selected designs centered on the themes of cleanliness, recycling, composting and/or honoring the DSNY workforce. In addition to these themes, design considerations included uniqueness of design, complexity of design and potential for a flexible palette, as no colors could be guaranteed in advance.

“This is art at work,” said deputy mayor for operations Julia Kerson. “After today, these trucks aren’t going to sit on a corner or fill a museum, they’ll be on the streets immediately, helping New York’s Strongest haul millions of pounds of trash, recycling, and compost every day.

Thank you to the incredible artists and the workers of DSNY for reminding New Yorkers that public service is something to be marveled at.”

“At the Sanitation Foundation, we believe every New Yorker has a role to play in caring for this city,” said Caryl Englander, board chair of the Sanitation Foundation. “Trucks of Art is a visible reminder of that shared responsibility, celebrating New York-based artists, local communities, and the DSNY workers who help care for our city every day.”

The selected artists painted their trucks over a seven day period at the Department of Sanitation’s Central Repair Shop in Maspeth. Trucks of Art was also a zero-waste challenge, with artists using cans of New Yorkers’ unwanted paints collected through Materials for the Arts and partners including Big Reuse and Green-Sheen, a partner of PaintCare.

Each artist received a stipend for their work, thanks to the Sanitation Foundation and its generous sponsors, including Mack and PaintCare. To further its mission of keeping the city clean, the Sanitation Foundation organized two community cleanups Tuesday in the area surrounding Union Square.

Each of the five trucks will be sent to sanitation garages, where they will immediately begin collection routes.

This is the department’s third Trucks of Art program.

Liberty Waste Solutions acquires Randolph County Garbage Services

Liberty Waste Solutions, a provider of integrated waste and recycling solutions in North Carolina, has acquired Randolph County Garbage Services, a residential subscription waste collection operation located in Asheboro, North Carolina, serving customers across the greater Greensboro and Triad market.

This strategic acquisition builds on Liberty’s recent acquisition of AJ Disposal, increasing residential route density and further strengthening the

company’s presence in the Asheboro and Greensboro regions. Financial terms of the transaction remain undisclosed.

Liberty has undertaken significant operational enhancements since first receiving financial backing from Allied Industrial Partners in 2022, including modernizing its fleet, implementing advanced routing and dispatch technologies and expanding its suite of waste management services.

Veolia acquires Clean Earth

Veolia, a leader in environmental services, has completed the financial close of its acquisition of Clean Earth, a hazardous waste management firm operating in a sector that has become increasingly critical for industrial competitiveness, public health and environmental security in the U.S. and worldwide.

This transaction doubles Veolia’s footprint in the hazardous waste sector in the U.S. and brings the company’s overall revenue in the U.S. to \$6.3 billion, thereby strengthening its global presence while enhancing its ability to deliver new services, efficiency gains and integrated solutions to its customers. Already

a world’s leader of hazardous waste services and technologies, the Group now becomes the second-largest player in the U.S., opening a new phase of growth for the company in the country. The transaction is expected to be accretive from 2027 excluding Purchase Price Allocation adjustments, and confirms all announced financial objectives related to the integration including expected synergies.

Hazardous waste treatment has become a strategic sector in the U.S., driven by rising industrial demand, tighter environmental standards and the expansion of high-growth industries requiring specialized treatment solutions.

DSNY returns over five million pounds of compost to NYC residents in 2026

The NYC Department of Sanitation announced two milestones in its compost giveback program. The Department has now given away more than 5 million pounds of finished compost to 10,000 New York City residents this year alone.

New York City residents, nonprofit organizations and city agencies can get free, high-quality compost made from the material collected from the city’s curbside composting program. DSNY gives away compost to residents at six seasonal compost pick-up sites in the

spring and summer months, as well as pop-up community giveback events.

The Department’s Curbside Composting program serves residents in all five boroughs, making it the largest – and easiest – curbside composting program in the nation. To comply with NYC regulations requiring compostable material to be separated from the trash, residents set out their food scraps, food-soiled paper and yard waste in a marked bin for collection on their weekly recycling day.

SWANA updates key technical policies

The Solid Waste Association of North America (SWANA) released three updated Technical Policies on key industry topics: the Development of Regulations Related to Solid Waste Management; the Safe Recycling of Electronic Waste; and Conversion Technologies, Resource Recovery and Energy Recovery as Part of Integrated Solid Waste Management.

The SWANA Sustainable Materials Management (SMM) Technical Division Advocacy Committee and the SWANA Waste Conversion & Energy Recovery (WCER) Technical Division served important roles in the policy review and updating process. The SWANA Policy Committee led the review process and the SWANA board of directors approved the updated policies on April 19, 2026.

Technical Policies represent the positions SWANA takes on the various technical aspects associated with waste and resource management, serving as a basis for SWANA advocacy and as a resource for SWANA members and other industry professionals.

The three new policies, updated to reflect modern practices and safety approaches, include:

T-3.2 The Development of Regulations Related to Solid Waste Management

This policy provides an overview of what state/provincial governments in the US and Canada should focus on when developing, implementing, enforcing, and reviewing solid waste

management regulations. It states that “SWANA supports the need for strong and clear regulations that lead to optimal solid waste management systems and that protect human health and the environment” and describes the range of activities that are needed to make up a robust waste and resource management program.

T-6.3 Safe Recycling of Electronic Waste

This policy explains that SWANA supports responsible recycling of electronics and the approach to the responsible provision of electronics recycling. It stresses that ensuring responsible management of electronic waste is important for many reasons, including the prevention of fires caused by lithium-ion and other batteries in electronics.

T-8 Conversion Technologies, Resource Recovery, and Energy Recovery as Part of Integrated Solid Waste Management

The policy states that SWANA supports integrated solid waste management systems that prioritize waste reduction and recycling and describes the critical process to evaluate and apply multiple complementary solutions where they are environmentally responsible and economically viable. It explains that SWANA supports resource recovery, conversion technologies, and waste to energy as integral components of an integrated solid waste management system, provided they meet certain criteria, as described in the policy.

BUSINESS BRIEFS

SICON’s Guschall named recipient of Charles W. Briggs Award

■ SICON congratulated Heiner Guschall, managing director of SICON GmbH, on being named a recipient of the 2026 Charles W. Briggs Award. With this prestigious award, AIST recognizes outstanding technical contributions in the field of steelmaking.

Established in 1961 in honor of Charles W. Briggs, the award is presented to the author of a paper selected by the AIST Steelmaking Technology Division and judged by the AIST Electric Steel-making Technology Committee to be the best technical paper submitted.

The award recognizes the paper “Optimization of Fe Feedstocks for EAF Steelmaking,” to which Guschall contributed as a co-author. The paper focuses on the optimization of iron-bearing feedstocks for steelmaking in electric arc furnaces. It highlights the growing importance of scrap quality for efficient, economical, and CO₂-reduced EAF steelmaking.

The paper shows that while steel scrap plays a central role in the transition toward more climate-friendly steel production, increasing levels of residual elements such as copper, nickel, chromium and tin, as well as contamination from non-metallic components, can significantly affect the operation of the electric arc furnace. Targeted improvement and processing of scrap quality can help increase yield, reduce energy demand, lower the use of fluxes and improve the CO₂ footprint of steel production.

The award underlines the relevance of this topic for the future of the steel industry. Sustainable and competitive EAF steelmaking will increasingly depend on how effectively scrap qualities can be measured, evaluated, and specifically optimized.

TerraCycle acquires NLR Inc.

■ TerraCycle Commercial, a division of international recycling leader TerraCycle®, announced the acquisition of Connecticut-based NLR Inc.

As part of TerraCycle Commercial, NLR customers will continue working with their same service contacts while gaining access to the full range of TerraCycle solutions, including the Zero Waste Box™ and bulk recycling solutions for hard-to-recycle materials beyond regulated waste.

NLR’s East Windsor team remains in place, maintaining service continuity as the company joins TerraCycle Commercial. Co-founder Ray Graczyk, chairman of the Association of Lighting and Mercury Recyclers, retires after three decades of shaping national recycling policy and building NLR into a leading regulated waste operator. His legacy continues through the operation he built, which co-founder Robert E. Robert will continue to manage.

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Intelligent waste management for C&D recycling

by MAURA KELLER

mkeller@americanrecycler.com

As sustainability expectations rise across the construction sector, technology is reshaping how construction and demolition (C&D) waste is tracked, managed and recycled. From artificial intelligence and predictive analytics to integrated software platforms and automated data collection, the industry is moving toward smarter, more transparent recycling operations. Increasingly, contractors, recyclers, project owners and regulators are looking for technology solutions that not only document recycling performance but also provide real-time visibility into what is happening on the jobsite.

According to David Berg, chief executive officer of CommanderAI, the waste and recycling industry has historically focused its technology investments on logistics and operations.

“For decades, the waste and recycling industry has invested heavily in optimizing operations, perfecting routes, maximizing truck utilization and improving disposal logistics,” Berg said. “But one critical function has remained largely untouched by innovation: sales.”

That gap is where newer technology platforms are beginning to make an impact. Berg explained that AI-powered systems are helping C&D recyclers and haulers identify emerging opportunities by analyzing real-time market signals such as new construction projects, business openings and changes in waste generation patterns.

Berg said that AI-powered sales and market intelligence tools are helping companies uncover new opportunities by identifying emerging demand patterns and market activity.

From Historical Reporting to Real-Time Intelligence

The shift reflects a broader trend within the construction industry, where contractors are demanding more detailed and actionable waste management data. Tracking total tons hauled is no longer enough. Contractors increasingly want insight into material types, diversion rates, contamination levels, pickup frequency, container usage, and site-specific recycling performance.

“The shift has been from historical reporting to more actionable insights that help improve efficiency, control costs, and support sustainability goals,” Berg said.

Visual Documentation Adds Transparency

At the same time, documentation itself is evolving. Roger Yarrow, co-founder and chief executive officer of TrueLook, said technology is helping strengthen traditional reporting processes by adding visual verification and transparency.

“Contractors have always relied on written records to track recycling volumes, diversion rates and material recovery,” Yarrow said. “What technology is doing now is strengthening those records with objective visual context. A written log tells you what was reported. A visual record helps verify what actually happened on site and gives contractors, owners, and regulators more confidence in the accuracy of the data.”

Yarrow noted that reality-capture technologies such as cameras, drones and AI are becoming increasingly valuable tools for measuring materials moving in and out of jobsites, identifying trends and supporting existing reporting efforts. Rather than replacing current documentation practices, these technologies provide a more transparent and defensible record of recycling activities.

The type of information contractors want to collect has also changed significantly in recent years. While documentation once served primarily as proof that activities occurred, many firms now want data that provides operational insights while projects are still underway.

“The shift I have watched is from proof to insight,” Yarrow said. “A few years ago, contractors wanted documentation as a defensive tool. Proof something happened. Proof they complied. Now the better contractors want data that helps them understand progress in real time.”

Visual data is playing an important role in that transformation. Continuous camera monitoring can provide a detailed record of jobsite activity that helps teams identify delays, bottlenecks, material movements and operational issues as they occur.

“A continuous camera feed tells a more complete story than a form someone



Smart technology is transforming how construction and demolition (C&D) waste is tracked, managed, and recycled – using AI, predictive analytics, and integrated platforms to drive smarter, more transparent recycling operations.

filled out at the end of a long day,” Yarrow said. “It can show progress over time and capture specific events that matter to the team, like a dumpster reaching capacity or materials being moved on or off site.”

Connecting Sustainability Data Across Projects

The growing demand for actionable information is also driving stronger integration between waste management platforms and other construction technologies. Software systems that once operated independently are now becoming connected across entire project ecosystems.

“Waste and recycling data is increasingly being tied into project management, logistics, fleet and operational systems to create a single view of performance,” Berg said. “This helps teams connect sustainability efforts with project timelines, transportation efficiency and overall project execution.”

Yarrow agreed that integration will be critical as the industry continues digitizing operations.

“The construction tech ecosystem is moving toward connection,” Yarrow said. “Fewer silos: more of a unified picture of what is actually happening on a project.”

Yarrow said sustainability information becomes more valuable when it's integrated with broader project management data rather than residing in isolated systems.

“When sustainability data lives in its own disconnected tool, it is hard to act on,” Yarrow said. “When it is part of the same operational picture as scheduling and subcontractor performance, it becomes something you can manage, not just report on.”

Meeting Growing Compliance Demands

As sustainability requirements become more demanding, digital reporting tools are also helping contractors meet increasingly complex compliance obligations. Owners, municipalities and regulatory agencies often require far more documentation than they did just a few years ago, creating new administrative burdens for project teams.

“The documentation burden is real, and it is growing,” Yarrow said. “Owners want more proof, not just final numbers. Municipalities are getting more specific about what they need to see.”

Digital tools can help simplify that process by continuously collecting supporting documentation throughout the life of a project. According to Yarrow, visual records add an important layer of evidence that strengthens traditional reporting methods.

“What digital tools do is make that proof more complete without adding a

See C&D RECYCLING, Page B2

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C&D Recycling

■ Continued from Page B1

massive administrative lift,” Yarrow said. “When visual documentation is captured continuously throughout a project, it layers on top of what teams are already doing and adds another dimension to the record.”

This additional transparency can be especially valuable during audits, owner reviews and sustainability reporting initiatives, where stakeholders increasingly want to understand not only the final recycling numbers but also the activities behind them.

“Contractors who have gone through a detailed owner review or audit with strong visual documentation behind them know how much it changes that conversation,” Yarrow said. “It is not just that you have the numbers; you can show the story behind the numbers.”

Real-Time Visibility Improves Operations

Real-time visibility is also helping improve operational performance. By providing immediate insight into waste streams and recycling activities, technology enables project teams to identify problems earlier and take corrective action before issues become costly.

“Visibility changes behavior,” Yarrow said. “When people know activities are being documented, they tend to be more deliberate in how work is performed.”

He explained that when teams have continuous visibility into jobsite activities, they can more easily identify situations such as improperly separated materials, overflowing containers, or recycling processes that are not meeting project requirements.

“For recycling and waste management, real-time visibility gives teams a more transparent view of what is happening before it becomes a dispute, a missed requirement or a costly correction,” Yarrow said.

The Expanding Role of AI and Automation

Automation is further enhancing the value of these systems. Many contractors are already generating significant amounts of documentation, but technology can help make that information more useful without increasing workloads.

“When visual documentation is captured automatically alongside what teams are already logging, you get a more whole picture without adding to anyone’s workload,” Yarrow said. “That combination of written records plus continuous visual context is what makes compliance reporting more defensible and audits more straightforward.”

Artificial intelligence is expected to further accelerate these capabilities in the years ahead. Predictive analytics tools can help contractors and recyclers anticipate operational issues before they occur, allowing for more proactive decision-making and reduced waste contamination.

“AI and predictive analytics will likely have a major impact by helping contractors identify trends and anticipate issues before they happen,” Berg said.

Yarrow believes AI’s greatest impact may come from its ability to analyze large volumes of visual information that would otherwise be impossible for project teams to process efficiently.

“AI applied to visual data is where I think the biggest gains are coming,” Yarrow said.

According to Yarrow, cameras capture far more information than any individual can realistically review. AI can help identify patterns, flag anomalies and direct attention to important events in real time.

“A camera captures far more information than any person can process in real time,” Yarrow said. “AI can surface the signal from that footage – flagging issues, identifying patterns, alerting the right person at the right moment.”

This capability has the potential to improve both operational efficiency and documentation quality while reducing the burden on field personnel. “That means problems get caught earlier and documentation gets richer without adding any burden to the field,” Yarrow said.

Emerging technologies such as computer vision and automated data collection are also expected to play a larger role in C&D recycling operations. These tools can help automate material identification, improve traceability, and reduce the amount of manual labor required to sort and monitor waste streams.

“Material traceability will become more important as owners and regulators demand greater transparency around where materials come from and where they end up,” Berg said. “Computer vision and automated data collection tools could further reduce manual work and improve decision making.”

Adoption Remains a Critical Challenge

While the potential benefits are significant, implementation remains a challenge. Technology adoption in construction has historically lagged behind many other industries, and successful deployment often depends on how seamlessly tools fit into existing workflows.

“Adoption is the hardest problem in construction technology,” Yarrow said. “The field adopts things when the tool genuinely makes their job easier and adds something they did not have before, not when it creates more steps.”

Providers that focus on simplicity and ease of use are often seeing stronger adoption rates because they reduce friction for field personnel and project managers alike.

Building a More Connected Future for C&D Recycling

Looking ahead, both Berg and Yarrow see technology continuing to transform how C&D recycling programs are managed, measured, and optimized. The industry’s future will likely be shaped by increasingly connected systems that combine AI, automation, visual documentation, predictive analytics and operational data into a comprehensive view of project performance.

Yarrow said the industry’s future will likely favor solutions that connect sustainability, operational, and project management data into a more unified view of project performance.

“The best tools slot in alongside existing workflows and make the overall documentation stronger,” Yarrow said. “If it feels like extra work without a clear payoff, it will not stick.”

Construction spending rises 0.9 percent

Construction spending increased 0.4 percent from March to April and 0.9 percent over 12 months, according to an analysis by the Associated General Contractors of America of a new government report recently released.

Construction spending totaled \$2.172 trillion at a seasonally adjusted annual rate in April. That figure is 0.4 percent above the revised March rate and 0.9 percent higher than the April 2025 level.

Public construction spending increased 0.4 percent in April and was 3.7 percent higher than one year earlier. The largest public category, highway and street construction, increased by 0.4 percent from March and 3.9 percent over the past year. That segment alone accounts for more than a quarter of total public construction and contributes to economic growth through improved travel times for people and freight, as well as supporting industries that supply materials and equipment for the projects.

Private residential construction increased 0.8 percent for the month, and 1.7 percent compared to April 2025. Single-family construction increased 1.4 percent from March but remained 2.9 percent below year-ago levels.

Multifamily construction slipped 0.3 percent for the month but was 1.1 percent higher than a year earlier.

Private nonresidential construction declined 0.2 percent in April and fell 2.1 percent compared to April 2025. Manufacturing construction continued to weaken sharply, dropping 18.5 percent over the past 12 months. The next-largest private category, electric power and oil and gas-related construction, rose 0.6 percent for the month and 6.0 percent year over year. Commercial construction slipped by 0.7 percent from March but rose 1.5 percent from April 2025, with warehouse construction down 1.6 percent year over year and retail construction up 5.9 percent. Private office construction, including data centers, climbed 1.0 percent for the month and 9.4 percent over 12 months, with data centers jumping 28 percent over 12 months while actual offices fell 5.5 percent.

Association officials noted that federal funding for highway and transit construction supports projects in every state, improving travel times for individuals and freight while improving safety.

Construction job openings increase by 25,000

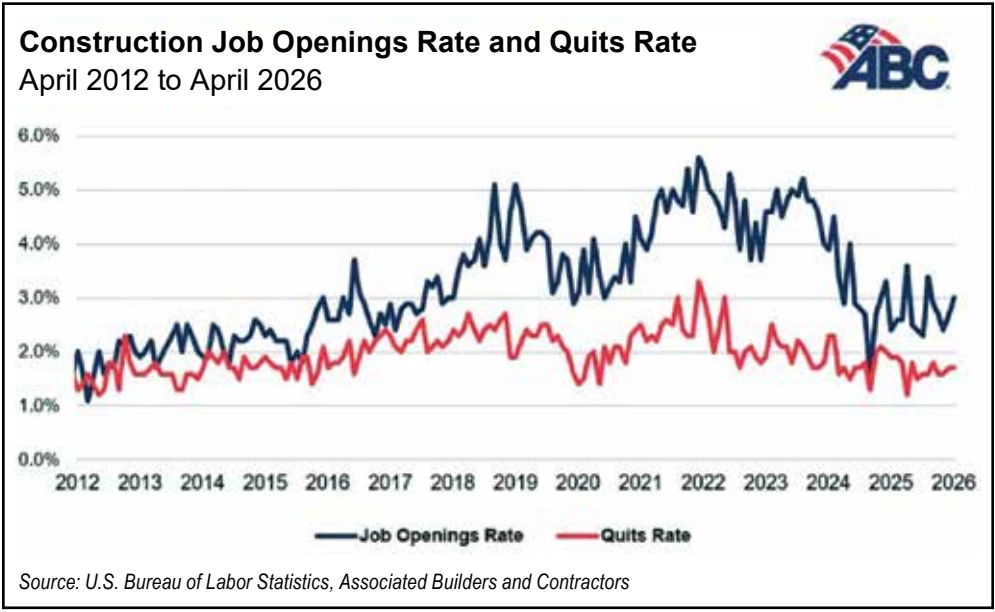
According to the Associated Builders and Contractors Association, (ABC), the construction industry had 259,000 job openings on the last day of April, according to an Associated Builders and Contractors analysis of data from the U.S. Bureau of Labor Statistics’ Job Openings and Labor Turnover Survey. JOLTS defines a job opening as any unfilled position for which an employer is actively recruiting. Industry job openings increased by 25,000 the previous month and are up by 52,000 from the same time last year.

“This release of April data suggests that contractors are increasingly struggling to fill open positions,” said ABC chief economist Anirban Basu. “Fewer construction workers were laid off in April than in any month since the first



half of 2022, and industrywide job openings, while still relatively low by historical standards, are up more than 25 percent over the past year.

“These dynamics likely stem from immigration policy and the shrinking number of undocumented workers, as well as acute shortages of certain trades workers, including those involved in data center construction. While contractors remain broadly optimistic about increasing their staffing levels over the next six months, according to ABC’s Construction Confidence Index, labor availability is unlikely to improve over the short term.”





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Blackroc Group files application for sustainable asphalt recycling facility

Blackroc Group, Australia, has lodged a development application for a state-of-the-art asphalt recycling facility in East Deep Creek, reinforcing the company's commitment to sustainable infrastructure development and circular economy principles across Queensland.

The proposed facility, located on Metal Court in East Deep Creek, will process between 30,000 and 40,000 tonnes of asphalt annually, transforming reclaimed road materials into high-quality recycled asphalt products. Strategically positioned near the Bruce Highway transport corridor, the site has been selected to support efficient logistics and regional infrastructure projects while reducing the environmental impact associated with road construction and maintenance.

The facility is designed to divert significant volumes of construction and demolition waste from landfill, enabling valuable materials from existing road networks to be recovered and reused. By recycling old asphalt, Blackroc Group aims to support more sustainable road-building practices while reducing demand for virgin construction materials.

Environmental performance has been a key consideration in the facility's



design. The development application includes advanced dust filtration technology that captures fine particles generated during production and returns them to the asphalt mix, minimizing waste and improving air quality outcomes. A dedicated 692 square-meter bio-basin is also proposed to manage and treat storm water runoff before it leaves the site.

To further minimize impacts on surrounding communities, the proposal stipulates that pavement crushing activities will not occur during night-time hours.

The facility is expected to generate up to 92 vehicle movements per day, including the operation of 20 meter semi-trailers transporting recycled materials and finished products. As part of the development, road and intersection upgrades are proposed to ensure the safe and efficient movement of vehicles to and from the site.

Coastal Waste & Recycling to strengthen C&D recovery capacity

Coastal Waste & Recycling (Coastal) continues to invest in expanding its recycling operations across Florida, with four material recovery facility (MRF) projects completed or underway. Following the successful startup of two systems in 2025, two additional systems are scheduled to begin operations in 2026. As part of these projects, Coastal selected Machinex to provide advanced turnkey systems aligned with its operational needs across commercial, residential single-stream and construction and demolition (C&D) facilities.

"We are excited to open both facilities as they are important to our long term sustainability objectives," said Brendon Pantano, chief executive officer of Coastal Waste & Recycling. "Our partnership with Machinex has been important in meeting our goals."

Advancing Commercial Recycling Operations in Ft. Myers

Commissioned in fall 2025, the 20 TPH Ft. Myers commercial single-stream system transformed a former dump-and-bale site into a fully integrated processing facility. Designed to improve OCC quality while adding flexibility to process residential recycling alongside commercial material, the system features a Back Scraping Drum, MACH Screw Screen™, MACH Ballistic Separator, MACH Eddy Current



and II Ram Baler, all manufactured by Machinex. The facility now produces high-quality OCC, mixed paper, ferrous and nonferrous bales.

Strengthening C&D Recovery Capacity in Indian River

In Indian River, Coastal expanded its strong C&D presence by adding a 100-TPH system commissioned in late summer 2025. The system incorporates a MACH Trommel and MACH Eddy Current to recover wood, OCC, ferrous, nonferrous, aggregate and recovered screen material.

The collaboration quickly evolved beyond the initial projects. Coastal cited Machinex's timeliness, efficiency and seamless project management throughout the process as key factors in expanding the relationship to include a commercial and residential single-stream facility in Pompano Beach and a C&D system in Miami in 2026.

Together, the four-project roll-out represents a scalable, long-term approach to processing infrastructure, strengthening Coastal's footprint in the commercial, residential single-stream and C&D markets across Florida.

EQUIPMENT
SPOTLIGHT

Material Handlers

by MARY M. THORNTON
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In the construction and demolition (C&D) industry, material handlers play a crucial role as the primary link between construction and debris management. These specialized machines differ from standard excavators, requiring high-reach capabilities and specialized hydraulics to handle the heavy, awkward loads typical of C&D operations. Secondary demolition is critical in preparing concrete and steel for downstream processing. After structures are torn down, large concrete pieces must be reduced and separated to meet recycling requirements and/or to prepare material for downstream use.

Engineered as high performance excavator attachments, Astec MCP Series hydraulic pulverizers are purpose-built for secondary demolition and concrete recycling applications. The MCP Series allows operators to grab large concrete pieces directly from rubble piles and aggressively pulverize them, breaking concrete down while exposing and separating embedded reinforcing steel. This process produces crushed concrete suitable for reuse as base material while generating clean scrap steel for recycling.

Terry McKague, sales manager, commented that “Fast, controlled operation is central to MCP Series performance. Large-diameter hydraulic cylinders deliver strong crushing force without the need for complex

intensifier valves, providing consistent power across demanding applications. A regenerative valve further increases productivity by redirecting oil flow during non-load movement, significantly boosting cylinder speed and improving overall cycle times. This enables operators to process material efficiently while maintaining precise control during separation work.”

McKague also claims that strategically designed jaws and replaceable wear components enhance fragmentation and extend service life in abrasive C&D environments. Integrated cutting blades allow operators to shear reinforcing steel during processing, simplifying tramp metal handling and reducing the need for additional equipment. As scrap yards typically require rebar to be completely free of concrete, the MCP Series enables contractors to reduce material to a size that ensures full separation, eliminating the need for further handling or reprocessing.

“Designed for durability, speed and separation quality, Astec’s MCP Series hydraulic pulverizers are widely used by C&D contractors focused on maximizing material recovery while keeping secondary demolition operations efficient and flexible. In demanding recycling environments, they provide operators with consistent performance when clean steel separation is essential,” McKague concluded.

Sennebogen offers a wide range of material handlers for C&D, from the

easy-to-transport, multifunctional 825 E to the heavy-duty 870 Demolition. This latter model boasts impressive reach distances of up to 65 feet. All Sennebogen C&D machines feature the exceptional visibility of the Maxcab. This cab can tilt up to 30 degrees or elevate up to 20 feet, providing operators with a clear view of high-reach work.

Constantino Lannes, president, said that effective material handling in C&D hinges on a well-balanced combination of capability, versatility, sustainability and efficiency. “One of the common challenges lies in setup and transport. Large, high-reach machines often need disassembly for transport, which can be cumbersome. Sennebogen addresses this issue with telescopic undercarriages that retract for transport and expand for stability, along with self-assembly systems that minimize the need for assist cranes. As versatility is key in the C&D sector, using a machine that can perform multiple roles significantly boosts profitability. The Sennebogen Vario Tool system and quick-change couplings enable a single machine to rapidly switch between shears, pulverizers, buckets and sorting grabs,” stated Lannes.

He added, “Maintaining these machines in the typically harsh job site environment is essential. Dust and debris can clog radiators and cause hydraulic failures. The industry often relies on ‘reactive maintenance,’ which means waiting for failures to cause costly downtime. Sennebogen offers a suite of related solutions, including technical inspection service and preventive maintenance assistance. Additionally, the SENtrack Telematics system allows operators to remotely monitor fuel use, idle time and predictive maintenance needs, to help machine owners maximize their investment by keeping their equipment operational. Sourcing skilled operators



Astec/Breaker Technology Inc. (BTI)

capable of handling complex, multi-functional machines is a significant barrier to productivity. To address this, the Sennebogen Academy offers a comprehensive range of courses, including operator and technical training.”

Sierra International Machinery manufactures a full line of material handlers including the T308, T409, T510, and T815, designed to support high-volume recycling and demolition operations.

Built with simplified controls, operator visibility and ease of maintenance in mind, the machine is designed to reduce downtime and improve jobsite productivity. The T510 Material Handler (59,000 lbs. with a 43 feet reach) is widely suited for demolition and recycling applications, offering a balanced combination of reach, lifting capacity and fast cycle times that allow operators to efficiently sort, load and move mixed materials such as structural steel, concrete and recyclable metals.

“End users in the demolition and recycling sector face ongoing challenges, including inconsistent material streams, limited jobsite space and the need to maintain production while meeting safety and environmental standards. Equipment must be easy to mobilize, assemble quickly and be capable of handling a wide range of materials without sacrificing efficiency. Material handlers like the T510 address these challenges by providing versatility and reliability in demanding environments. The current business climate reflects increasing demand for efficient material separation and higher

See Material Handlers, Page B5



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A close-up image of an Astec hydraulic shear attachment cutting through a large piece of steel reinforcement (rebar). The shear is shown in the process of separating the steel into two pieces.

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Material Handlers

■ Continued from Page B4

recovery rates as recyclers look to maximize value,” Tom Hickson, director of material handler sales, explained.

Hickson noted how Industry trends also include electrification, emissions compliance and technology integration as regulations continue to evolve and impact equipment selection. “It is important to adapt to regulatory changes and improving operational efficiency through advanced equipment. As sustainability efforts continue to increase, material handlers remain a critical piece of equipment in modern demolition and recycling operations, helping facilities move more material, recover more value and operate more efficiently. Sierra’s equipment is developed from experience we’ve gained, operating a recycling and demolition facility, ensuring the machines are built for real-world conditions and continuous use. We’ve spent decades manufacturing equipment for the C&D and recycling industries across North America, supporting processors where uptime is critical.”



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Construction and demolition waste management growth forecast 2026 – 2033

According to a report by Persistence Market Research, construction and demolition waste management is projected to grow through 2033.

The global construction and demolition (C&D) waste management market size is expected to be valued at \$227.4 billion in 2026 and projected to reach \$322.1 billion by 2033, growing at a CAGR of 5.1 percent between 2026 and 2033. This sustained growth is anchored in accelerating global construction output, tightening landfill diversion mandates across developed markets, and the circular economy's rising priority on secondary materials recovery from demolition streams.

The United Nations Environment Programme (UNEP) estimates that construction and demolition activities generate approximately 40 percent of global solid waste volumes, creating an enormous and structurally growing management challenge that governments, municipalities and private operators are compelled to address through invested infrastructure and policy frameworks, each of which directly expands the addressable TIC service base and contracted waste management revenue.

Drivers – Stringent Global Landfill Diversion Targets and Circular Economy Legislation Are Structurally Expanding Recycling and Processing Demand

For C&D waste management operators, the most consequential market signal is the progressive tightening of landfill diversion and material recovery targets by governments across Europe, North America, and Asia Pacific, a shift that is converting what were previously low-margin disposal contracts into higher-value processing and recycling service opportunities. The European Union's Construction Products Regulation and Waste Framework Directive (2008/98/EC) set a binding target for 70 percent C&D waste recovery by weight across EU member states, and the recast EU Construction Products Regulation (2024) extends material passport requirements that effectively mandate traceability of recovered materials, rewarding operators with certified processing and secondary materials trading capabilities.

The U.S. EPA has identified C&D debris as one of the largest waste streams in the country, generating an estimated 600 million tons annually, and a growing number of U.S. states are adopting mandatory C&D recycling ordinances modeled on California's CALGreen Building Code requirements. Operators who invest in advanced material recovery facilities (MRFs) targeting concrete, metal, and clean aggregate recovery streams are positioned to capture premium tipping fees and secondary commodity revenue simultaneously.

Accelerating Global Infrastructure Investment Cycles Are Generating Record-Volume C&D Waste Streams That Require Managed Disposal and Recovery

Infrastructure investment programs worldwide are simultaneously producing

the raw feedstock of C&D waste management demand, demolition volumes from old stock clearance and construction waste from new build activity, at scales that are stretching the capacity of existing management infrastructure and rewarding operators who can deploy rapidly.

The U.S. Infrastructure Investment and Jobs Act (IIJA) committed \$1.2 trillion to roads, bridges, transit and utilities, with significant demolition of aging structures preceding new construction, each generating C&D waste streams requiring permitted management. Across Asia, the Asian Development Bank (ADB) estimates the region requires \$26 trillion in infrastructure investment through 2030, with demolition of inadequate existing stock in rapidly urbanizing cities generating C&D volumes at a pace that local waste management infrastructure has consistently struggled to absorb.

Restraints – Contamination of Mixed C&D Waste Streams Suppresses Recycling Yields and Undermines Secondary Material Economics

The structural challenge that constrains C&D waste recycling economics most severely is the inherent heterogeneity of demolition waste streams, which intermix concrete rubble, gypsum board, treated timber, asbestos-containing materials, and contaminated soil in proportions that vary dramatically by project type, age of demolished structure, and contractor sorting discipline at source.

The European Environment Agency (EEA) has documented that contamination rates in mixed C&D streams can reduce recyclable material yield by 30–50 percent, requiring costly sorting, pre-treatment, and in some cases specialized disposal that eliminates the margin advantage of recycling over landfill. For operators without the ability to enforce source-separation at demolition sites, a capability that requires contractual leverage and trained site supervision, mixed stream contamination directly suppresses processing facility throughput and secondary material quality, making it difficult to compete for premium recycled aggregate and metal sales contracts that underpin recycling-led business models.

Regulatory Fragmentation Across Jurisdictions Creates Compliance Complexity That Favors Large Operators and Disadvantages New Entrants

C&D waste management operates under a patchwork of national, regional, and municipal regulations governing permitted disposal sites, material classification, hazardous waste handling, transport manifests, and recycling credit accounting, a complexity that imposes disproportionate compliance costs on smaller operators and new market entrants seeking multi-jurisdictional scale. In the European Union, while the Waste Framework Directive sets the top-level framework, implementation varies materially across 27 member states in areas including end-of-waste criteria for recycled

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NEW PRODUCT SHOWCASE

BLOAPCO LAUNCHES TITAN SERIES EQUIPMENT



BloApCo
N114 W19125 Clinton Drive
Germantown, WI 53022
800-959-0880
www.BloApCo.com

BloApCo's Titan Series is a powerful line of industrial shredders and granulators designed for demanding recycling environments. The machines can process an extensive variety of materials including plastics, metals, wood, tires, rubber, electronic waste, textiles, wire, paper, medical waste and municipal solid waste. The line also supports specialized applications such as pipe shredding, bulky waste reduction and secondary granulation. Key features across the Titan Series include low-speed, high-torque shredding technology engineered to maximize efficiency and long-term durability, along with multiple rotor, blade and screen configurations that can be tailored to specific materials and application requirements.

PULVA CORP. HAMMERMILLS GRIND DRY MATERIALS



Pulva Corp.
105 Industrial Drive West
Valencia, PA 16059
724-898-3000
www.pulva.com

Pulva Corp. has unveiled a line of pulverizers. Designed and manufactured at the company's Valencia, Pennsylvania headquarters, their line of hammer mills features six standard models in a range of sizes from benchtop to mass production plus custom models to offer uniform particle sizing for a diverse variety applications. The pulverizers automatically grind dry, wet, abrasive and other materials down to preset particle sizes with precise control over the particle size distribution. The machines introduce material from a hopper via twin feed screws into a grinding chamber where high-speed, rotating hammers reduce the particle size. When the material meets the required size, it passes through a screen to discharge downstream.

SSI SHREDDING SYSTEMS EXPANDS UNI-SHEAR LINE



SSI Shredding Systems
9760 SW Freeman Dr.
Wilsonville, OR 97070
503-682-1704
www.ssiworld.com

SSI Shredding Systems, Inc. has launched a new line of finishing products – the Uni-Shear SR600F and SR900F. Both of these are engineered for high-volume processing and deliver refined, uniform output with precise particle sizes as small as 4 mm. The SR600F and SR900F grow SSI's product capabilities from traditional slow-speed shredding to medium-speed finishing. By utilizing optimized cutter geometry and multiple cutting opportunities per revolution, these machines maximize efficiency and throughput, allowing operators to upgrade the value of their finished products. The units can achieve throughput rates between 2 and 25 tons per hour.

VERMEER LAUNCHES NEW TRACKED TROMMEL



Vermeer Corporation
1210 E Vermeer Road
Pella, IA 50219
641-628-3141
www.vermeer.com

Vermeer expanded its trommel screen lineup with the new TR6500TX, a new tracked unit. The TR6500TX features a tracked undercarriage, a large hopper, a digital drum-angle readout and a full-function remote control to help optimize job site productivity. This powerful, versatile solution for material processing operations includes the compost, mulch and soil industries. The TR6500TX is powered by a 120-hp (90-kW) CAT 3.6L Tier 4 Final/Stage V engine and is designed for high-throughput applications. With a 20 foot long, 6.5-foot diameter quick-change tension screen drum, it can sort up to 180 yd³ per hour. Its drum speed can be adjusted from 0 to 25 rpm to accommodate various material types and moisture content.

Construction

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aggregates, treatment standards for hazardous C&D materials, and extended producer responsibility for construction products, each requiring separate permitting, reporting systems, and specialist legal counsel.

The practical consequence for market entrants is that establishing a compliant, multi-site C&D waste processing and disposal operation in a new European country typically requires 12–24 months of regulatory engagement before the first tonne of commercial waste can be accepted, creating a durable competitive moat for established licensed operators.

Opportunities – Processing & Recycling Service Segment Offers the Highest-Margin, Fastest-Growing Revenue Opportunity as Secondary Materials Command Premium Pricing

The processing and recycling segment is the fastest-growing service type in the C&D waste management market, and the most strategically consequential opportunity for operators willing to invest in advanced material recovery capabilities. Recycled concrete aggregate (RCA) now commands consistent commercial pricing in markets with strong circular procurement mandates, the UK Government’s Construction Playbook and Dutch SBK Environmental Performance Database both specify recycled content requirements for public infrastructure contracts, and recovered steel from demolition routinely achieves scrap market pricing that partially offsets processing costs.

The Ellen MacArthur Foundation’s

circular economy analysis estimates that recovering materials from C&D waste streams at the rate technically achievable could save \$100 billion annually in material input costs globally, providing a compelling economic case that procurement departments at major construction companies are increasingly acting on.

Middle East & Africa’s Construction Expansion Is Creating the Fastest-Growing Regional Demand Base, With Greenfield C&D Waste Infrastructure Opportunity

The Middle East & Africa region is poised to be the fastest-growing C&D waste management market globally, and the opportunity is particularly acute because the region is building modern waste management infrastructure largely from a low baseline, meaning first-movers can establish long-term asset positions before competitive density increases. Saudi Arabia’s Vision 2030 programme and the National Waste Management Center (NWMC) have explicitly prioritized C&D waste diversion as a national environmental target, committing to 100 percent diversion of inert C&D waste from landfill in new mega-project contracts for developments including NEOM and the Red Sea Project. The UAE’s Ministry of Climate Change and Environment mandates 75 percent C&D waste recycling on all major construction and demolition projects under its Green Building Codes, backed by municipal inspection and penalty enforcement frameworks in Dubai and Abu Dhabi.

Montgomery County to limit C&D waste loads

The Montgomery County Department of Environmental Protection (DEP), Maryland, announced that beginning in October 2026, new rules will limit how construction and demolition (C&D) materials are accepted at the Shady Grove Processing Facility and Transfer Station.

The changes aim to improve recycling, safety and efficiency in handling the roughly 300,000 tons of C&D material generated annually. Under the new guidelines, only loads under two tons will be accepted at the Transfer Station, with fees

applied to loads over 500 pounds, while larger loads must be taken to other regional facilities better equipped to sort and recycle materials.

County officials said the changes are intended to increase recycling rates and reduce landfill use, as the Transfer Station currently lacks the capacity to properly process much of the material it receives. Larger loads will be redirected to private facilities that can handle commercial-scale recycling, helping strengthen regional recycling efforts.

Joel Thames named ABC vice president of safety and workforce

Associated Builders and Contractors (ABC) named Joel Thames as the Association’s new vice president of health, safety, environment and workforce development. As a key member of ABC’s executive leadership team, Thames will lead health and safety, environment and workforce development initiatives.

Thames brings to ABC 20 years of construction experience and a strong passion for workforce development. He has been an involved member of the association both nationally and locally, holding numerous leadership positions, including past chair of the Trimmer Construction Education Fund Board of Trustees, past board chair of the New Orleans Bayou chapter and past chair of the chapter’s education and training committees. Prior to joining ABC, he was the corporate director of human resources, workforce development,

risk management and security for ABC member Performance Contractors Inc., headquartered in Baton Rouge, Louisiana. At Performance, Thames designed and led programs for thousands of construction professionals that enhanced employee skills, promoted career advancement and built sustainable pipelines of talent for the construction industry.

In this key leadership role at ABC, Thames will help ABC to deliver on its long-term strategic priorities in health, safety, environment and workforce development. He will provide subject-matter expertise and operational leadership in these critical areas to support program delivery, member services and industry advancement. He will lead design, development and implementation of innovative education, training and professional development programs.



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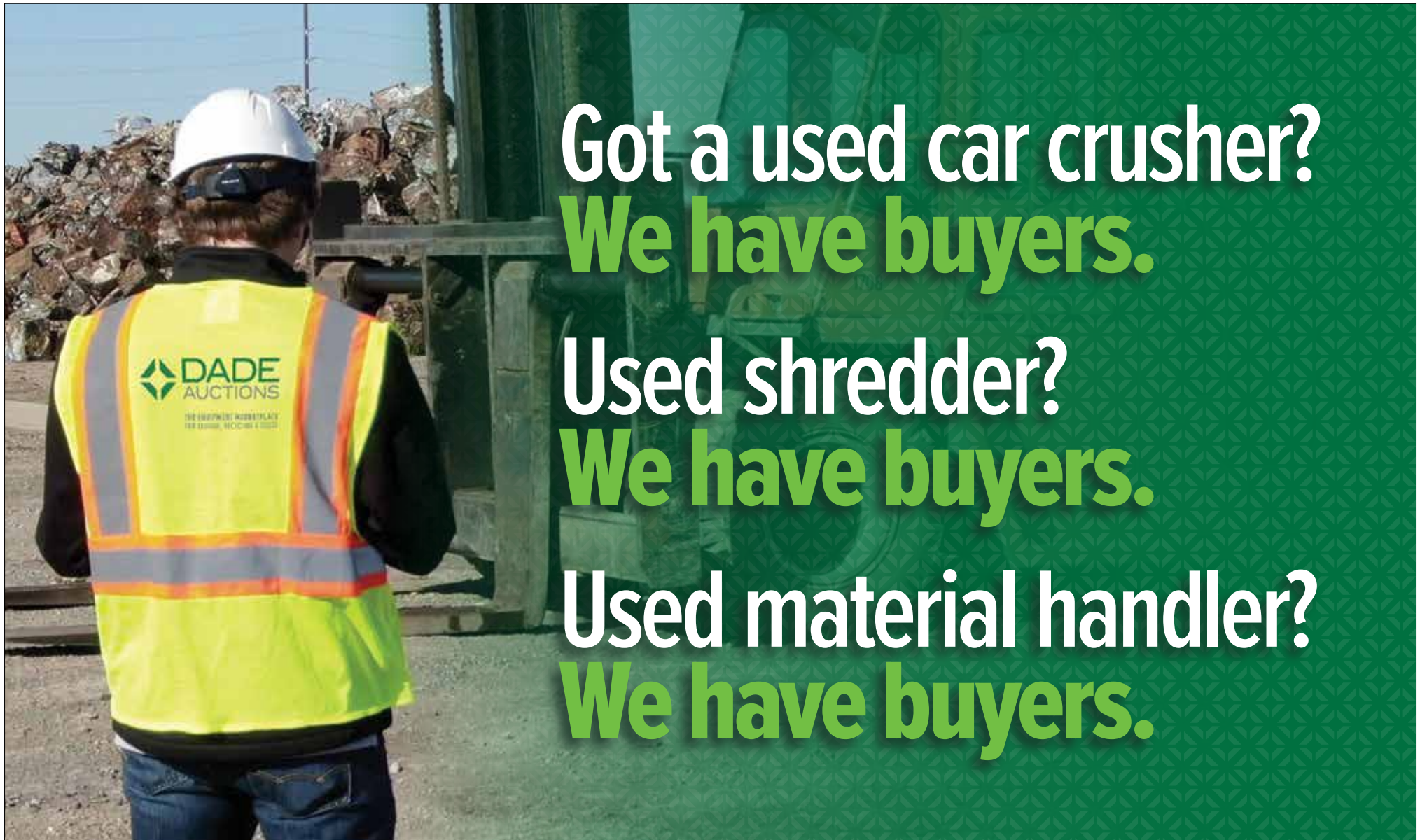
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