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New demand, new risks reshape metal markets

by MAURA KELLER

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For metal recyclers, commodity prices have always been a moving target, but today's market is being shaped by a wider range of forces, making price swings more difficult to predict and manage. Demand from data centers, grid infrastructure, electrification and solar manufacturing is creating new dynamics for metals such as copper, aluminum and silver, while tariffs and trade policies can shift domestic pricing almost overnight. Interest rates, currency movements, scrap supply and changing global trade relationships add still more variables.

For metal recyclers, the result is a market in which different metals increasingly follow different trajectories.

"Five years ago, a recycler mostly watched COMEX and the LME. Today you monitor ever-changing tariff policy," said Brett Henderson, chief executive officer and co-founder of Solar Panel Recycling LLC and vice president of PowerHouse Recycling Inc. "A tariff proclamation can reset premiums overnight."

Henderson's companies recover a range of metals from electronics and solar panels, including copper, aluminum, steel, gold, palladium and silver, providing a window into how differently today's markets can behave. "Aluminum seems to be a tariff story. Copper is a data center and grid story. Steel is a domestic capacity and scrap supply story," Henderson said. "It used to be that metals rose and fell together with the global economy. Now they each have their own narrative, and we must manage them separately."

New demand drivers

Traditional drivers such as construction, manufacturing and housing remain important, but energy infrastructure and technology are increasingly influencing demand. Copper is a prime example, with grid expansion, data centers and electrification creating substantial demand for the metal.

"Copper demand and pricing now seems driven by grid buildout, AI data centers and electrification," Henderson said. "Those buyers are far less sensitive to the business cycle than homebuilding or traditional manufacturing needs."

That can improve the economics of recovering copper from electronics, industrial equipment and other scrap streams, while simultaneously increasing competition for copper-bearing material. Silver is also benefiting from changing industrial demand as solar-cell manufacturing consumes the metal, while solar manufacturing supports demand for aluminum.

At South Post Oak Recycling Center, chief executive officer, Brandi Harleaux, said recyclers need to look at the broader economic cycle because the industries generating scrap are closely connected to the industries purchasing recovered



Demand from data centers, electrification and solar manufacturing is reshaping demand for copper, aluminum and silver, while tariffs and trade policies can quickly shift domestic prices.

metals. "At its core, it still comes down to basic economics – supply and demand," Harleaux said. "What has changed is the number of external factors influencing both sides of that equation and how quickly those factors can shift."

Construction, demolition, manufacturing, automotive and other industrial activity determine how much material flows into recycling facilities, while mills, foundries and processors depend on that material as manufacturing feedstock. When those industries slow, less scrap may be generated at the same time that downstream demand declines.

Interest rates can amplify those effects by influencing construction, equipment purchases, manufacturing expansion and other capital-intensive projects. "Recycling does not operate in isolation," Harleaux said. "We are connected to the entire lifecycle of materials – from manufacturing and use to end-of-life recovery and ultimately back into production."

Tariffs add another variable

Trade policy has become an increasingly important component of the metal-price equation. Henderson pointed to aluminum as a clear example, with tariffs on primary aluminum pushing domestic pricing higher and increasing the value of clean domestic aluminum scrap to U.S. foundries.

"The price is high, which recyclers welcome, but it is also finicky and you have to plan for large swings over short cycles," Henderson said.

Copper has also been affected by tariff policy while demand for domestic power infrastructure remains strong. For recyclers that already have relationships with U.S. consumers, increased domestic demand can provide an advantage.

"What began as an environmental and onshoring decision has become a commercial one," Henderson said. "Trade policy is increasingly pushing to keep critical metals in the U.S., and having those domestic relationships already established is an advantage."

But trade restrictions can create challenges when domestic processing capacity is insufficient. Henderson pointed to black mass from lithium-ion battery recycling, which contains nickel, cobalt, lithium and manganese. Restrictions on exporting black mass for refining can complicate the economics of recycling when U.S. refining capacity is not yet available at sufficient scale.

Harleaux likewise sees trade policy as a source of uncertainty because recycled metals move through an interconnected global marketplace. "Markets that made economic sense six months ago may look very different today," she said. "As a result, recyclers and downstream consumers are constantly evaluating alternatives and, in some cases, rerouting material into different markets."

The result is a market in which one commodity may command premium pricing while another moves sideways, forcing recyclers to remain flexible. "The entrepreneurs and business owners in this industry are having to be incredibly nimble," Harleaux said. "We are finding workarounds, developing new downstream relationships and adjusting strategies as trade conditions evolve."

The cost of holding inventory

Volatility also changes the economics of inventory management within the metal recycling space. Holding material during a rising market may appear attractive, but inventory carries costs related to capital, floor space and handling, along with the risk of a sudden price decline. Higher interest rates increase those carrying costs.

"We hold inventory, and so do the consumers of our metals, whether that is a smelter, a refinery, a foundry or a steel mill," Henderson said. "Every week material sits on the floor has a real cost, and higher rates make that cost higher."

Rather than trying to identify the perfect selling day, PowerHouse Recycling follows a consistent shipping

See METAL RECYCLING, Page A4

Building a stronger future for C&D recycling

by MAURA KELLER

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As construction and demolition (C&D) recycling continues to evolve, investment in infrastructure, advances in processing technology and the development of new end markets are helping make material recovery increasingly viable across the country. At the same time, recyclers, contractors, equipment manufacturers and other industry stakeholders are working to address persistent challenges, from geographic gaps in processing capacity to contamination and the need for reliable markets for recovered materials.

In this Q&A, Andrea Johnson, executive director of the Construction & Demolition Recycling Association (CDRA), discusses the progress being made across the industry and the factors driving that change. Johnson addresses everything from mixed-load sorting and facility certification to shingle recycling, emerging end markets and the role of data in demonstrating recovery performance, while also looking ahead to what the next 5 to 10 years could bring for C&D diversion and recycling.

American Recycler (AR): What are some of the most encouraging advancements you've seen in C&D recycling?

Andrea Johnson: One of the most encouraging shifts I've seen is the scale of investment coming from across the waste industry, landfill operators, haulers and independent operators. Landfill operators are putting real capital into recycling infrastructure, often because they want to conserve airspace and protect the long-term value of their sites. A landfill cell is a finite, expensive asset, so operators who once treated C&D material as straightforward tonnage to bury waste are increasingly looking at it as a resource to divert and monetize instead. At the same time, rising landfill disposal costs are changing the calculation for haulers and independent operators who don't own landfill capacity themselves. Diverting material to recycling or opening and operating their own facilities has become a more attractive option financially, not just an environmentally motivated one. Layered on top of that is growing demand from customers and contractors who want to see sustainable practices built into their projects, including recovering and recycling as much material as possible off the jobsite. That demand is starting to shape how haulers and operators

position themselves competitively. Recovery and recycling used to be treated as a side operation, almost an afterthought to the core business of disposal. Now, across landfill operators, haulers, and independent recyclers alike, it's increasingly seen as core to staying competitive and meeting where the market and the customer base are headed.

AR: Mixed loads are a standard part of the C&D recycling process. How are today's sorting and processing technologies improving recovery from mixed C&D loads?

Johnson: Mixed loads coming off a jobsite are the norm, not the exception, and the industry has built its technology and its processes around that reality rather than relying on source separation to happen consistently in the field. Modern facilities combine mechanical processes like screens, trommels and magnets with optical sorting, along with manual sorting for the materials that automated systems can't reliably distinguish. Not every facility relies on this level of automation, though. A meaningful share of the industry still sorts effectively using well-trained staff and methodologies like cart-based separation, where workers sort material into carts as an integral part of their sorting process. Done well, that approach can recover a comparable range of material to a more automated facility, and it reflects the fact that staff training is just as much a driver of recovery performance as the equipment on the floor.

AR: Some recycling facilities are achieving recycling rates of more than 70 percent on mixed loads. What technologies and practices are enabling facilities to achieve recovery rates that high?

Johnson: Facilities reaching those recovery rates tend to combine several things well rather than relying on any single piece of equipment. That includes pre-sorting to pull out large or hazardous items early, multi-stage mechanical separation, optical and sensor-based sorting for finer material streams, and, just as importantly, well-trained staff doing hand sorting where automated systems fall short.

A facility doesn't need to be fully automated to hit strong recovery numbers. Some of the best-performing operations lean heavily on experienced staff who know the material streams well enough to catch what a sensor or screen alone would miss. It also depends heavily on facility

layout and process design. The best-performing operations tend to think through the full path a load takes from tip floor to final bunker, minimizing the number of times material has to be handled and designing the line so each stage builds cleanly on the one before it.

Just as important is having reliable end markets lined up for each material stream before the material is even recovered. Recovery technology only matters if there's somewhere for the material to go, so the strongest operators invest as much in market relationships, contracts with paper mills, aggregate buyers and scrap processors, as they do in equipment.

A facility's recovery rate is only as good as the recyclability of the material coming off the jobsite. If contractors are using building materials that simply aren't recyclable, whether due to composition, contamination, or a lack of any viable end market, the facility has no real choice but to send that material to landfill regardless of how sophisticated its sorting process is. High recovery rates aren't purely a function of facility performance. They also reflect the materials and product choices being made upstream, which is part of why contractor and manufacturer decisions matter just as much as what happens on the sorting line.

AR: What role does independent certification play in demonstrating facility performance?

Johnson: This one matters a great deal to me. A facility that pursues certification through the Recycling Certification Institute (RCI) opens itself up to a full third-party audit, including a review of scale data across a minimum of twelve months. If any reported number varies by more than 5 percent, the facility doesn't receive certification. That's a meaningfully tight standard, and it means certified facilities are reporting numbers that have actually been tested against their own operational records, not estimates rounded in a favorable direction. RCI also verifies claims directly with end markets. If a facility reports shipping 100 bales of cardboard to a paper mill, RCI will contact that mill and confirm the amount actually received.

What certification really represents, though, goes beyond any single audit. A facility willing to go through this process is agreeing to be audited on a continual basis, not just once. That willingness to stand behind their numbers year after year is what actually builds confidence, both with consumers and with the general public who want to know that the recycling claims attached to their project are real. It carries real weight for LEED projects as well, where verified recycling data supports credits and documentation. But I'd argue the consumer confidence piece is just as important as the LEED benefit, if not more so. It gives the industry as a whole a credible answer when our recycling rate claims get questioned, which they sometimes are given how commingled our



incoming material streams tend to be. This gives everyday consumers a reason to trust that the recycling happening behind the scenes on their project is genuine.

AR: Looking ahead, what excites you most about the future of C&D recycling?

Johnson: What excites me most is watching an industry that used to operate in the background start to gain a real policy voice. Over the next 5 to 10 years, I expect to see continued movement on extended producer responsibility legislation, more consistent battery fire safety standards as electrification changes what shows up in the waste stream, and stronger DOT-level specifications that make recycled materials like RAS a standard input rather than an exception. I also expect to see growth in end markets we're only starting to develop today, particularly around gypsum and other materials where the recovered product is still working to earn the same level of confidence that recycled aggregate or scrap metal already commands.

A lot of that progress will come down to continued investment, and specifically to better data reporting that helps facilities, contractors, and end markets make decisions based on real numbers rather than assumptions. The industry has gotten much better at capturing this data, but there's still room to grow, and I think the facilities that invest in strong reporting now will be the ones best positioned to demonstrate their value over the next decade. I also expect to see continued investment in recycling infrastructure nationwide, closing some of the geographic gaps that still leave certain markets without a viable processing facility within a reasonable haul distance.

None of that happens in isolation from policy, though. A meaningful part of the work ahead involves better educating lawmakers and working directly with them to understand how our industry can support the sustainability goals they've already set for their states and communities, while also bringing real economic benefit through jobs, investment, and reduced landfill dependence. When lawmakers understand C&D recycling as an economic development tool as much as an environmental one, the policy conversation tends to shift in the industry's favor. If the industry keeps building the kind of verified, defensible data that regulators and end markets need to trust, while also doing the work to bring lawmakers along as genuine partners, I think diversion rates climb meaningfully over that window and recovered C&D materials stop being treated as a lesser substitute and start being treated as a preferred input.



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ABAT reports record breaking profits

American Battery Technology Company, an integrated domestic critical mineral manufacturing company that is commercializing its internally-developed technologies for both primary critical mineral manufacturing and secondary critical mineral recycling, released the unaudited financial results for its fourth quarter of fiscal year 2026 (FY26) ended on June 30, 2026.

During the quarter, American Battery Technology Company (ABTC) continued to scale-up and implement operational efficiencies at its Nevada critical mineral recycling facility and achieved record breaking quarterly revenue of \$8.2 million, while simultaneously decreasing cost of goods sold, resulting in a quarter-over-quarter increase in gross profit of 86 percent to \$1.3 million. This substantial growth in gross profit of its recycling facility further demonstrates the advantages of ABTC's internally-developed technologies and its position as one of the dominant critical mineral recyclers in the U.S.

In addition to operating its critical mineral recycling facility, ABTC is also developing and constructing its critical mineral mine and refinery at its Tonopah Flats Lithium Project (TFLP) near Tonopah, Nevada. During the quarter, ABTC announced that it had successfully won its appeal with the U.S. Department of Energy and had its previously terminated grant for \$57 million supporting the \$115 million construction of the first processing train at the TFLP fully reinstated.

Financial highlights, Fourth Quarter of FY26 (unaudited):

- \$8.2 million in Revenue, a 5.1 percent increase from the previous quarter
- An additional \$0.3 million income from interest for the quarter
- \$6.9 million in Cost of Goods Sold, a 2.8 percent decrease from the previous quarter

Resulting from implementation of several operational efficiencies

- \$1.3 million in Gross Profit, an 86 percent increase from the previous quarter and ABTC's largest ever positive gross profit from operations
- \$50.3 million cash, a 31 percent increase from the end of the previous quarter
- Includes \$49.5 million in unrestricted and \$0.8 million in restricted cash
- \$0.0 million debt, ABAT currently holds zero debt

These preliminary estimated unaudited financial results for the three months ended June 30, 2026, are based upon information available to the company currently. The data is not a comprehensive statement of the company's financial results for the three months ended June 30, 2026, and the company's actual results may differ materially from this preliminary estimated data. While the company currently expects its results for the three months ended June 30, 2026, to be within the range set forth herein, the review of its financial statements for the three months ended June 30, 2026 has not been completed.

Nashville's construction boom fuels a new model for recycling

As Nashville's east side undergoes one of the most aggressive redevelopment cycles in the country – anchored by projects like the new Tennessee Titans stadium—the volume of construction debris has surged.

But a different story is emerging behind the scenes. What was once considered waste is now treated as a resource. The way it's managed could reshape the construction industry nationally.

At the center of that shift is Rockwood Sustainable Solutions, a Lebanon, Tennessee-based company that has moved beyond traditional hauling and disposal to a new model: one focused on material recovery, end-market creation and infrastructure-level sustainability.

While large-scale sorting facilities have helped push recycling rates from single digits to roughly 50 percent locally, Rockwood's recent projects have achieved material recovery rates of 98 percent.

That performance level isn't the result of better sorting alone – it's the result of a fundamentally different approach.

"Most of the industry starts with the question, 'How do we move this waste?'" said Lincoln Young, president of Rockwood. "We start with, 'What can this material become?' We build the system backwards from there."

Rockwood was founded on the

premise that "we're not a waste company that looks for ways to recycle. Rockwood is a recycling company that figures out unique ways to transform waste."

Wood, plastics, metals, drywall and organics are repurposed into everything from agricultural products and engineered materials to site infrastructure and energy inputs. Instead of relying on centralized facilities, Rockwood pushes material separation upstream onto jobsites.

Their Tommy Carts® system allows crews to sort materials in tight, urban environments where traditional roll-off containers are inefficient, unsafe, or impractical. The result is improved material purity, safer working conditions, and more efficient logistics. When a roll off is the best tool for the job, Rockwood works closely with partners.

The broader impact goes beyond any single project. Rockwood works with national developers, contractors and research institutions to build repeatable systems that scale across markets, turning construction waste from a liability into a high value material stream.

In a world where construction debris accounts for nearly 30 percent of global waste, that shift has significant implications not just for sustainability goals but for how cities grow.



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Metal recycling

■ Continued from Page A1



schedule, moving recovered metals on a regular cycle regardless of short-term market conditions. That approach also makes processing speed a financial consideration.

“Processing speed becomes a financial decision, not just an operational one,” Henderson said, particularly for solar recycling operations where regulatory requirements and limited warehouse space can add pressure to move material through a facility.

Harleaux said volatility similarly makes South Post Oak more cautious when purchasing material. “If we purchase material today but do not know what the market will look like seven days from now when we’re ready to sell it, we have to account for that risk,” she said. Contracts and stronger downstream relationships can help create greater predictability, while careful inventory management helps recyclers avoid taking unnecessary positions in a volatile market.

Quality and diversification

Although recyclers cannot control commodity prices, they can control the quality and consistency of their output. Clean, properly graded material can

provide an advantage when buyers are already managing price uncertainty.

“Volatility rewards recyclers who produce a clean, consistent, specified product,” Henderson said. “When prices are moving, buyers pay up for material they can trust and discount material they must sort or sample.”

That makes processing technology, sorting and quality control important tools for protecting value, whether a recycler is producing a clean aluminum stream or a well-graded copper fraction.

Harleaux also recommended evaluating the downstream market before accepting material. “We also need to ask, What is the downstream market for it? Who is buying it? What is the demand? Does the economics of handling that material make sense for our business?” she said.

Diversification can extend beyond commodities. Solar Panel Recycling, for example, uses processing fees as part of its business model because some recovered materials, particularly glass, have limited or negative value after transportation and processing. Electronics recyclers similarly can generate revenue through data destruction, logistics, reporting, compliance and other services.

“Service value, meaning data destruction, on-site services, reporting, logistics and compliance, is a growing share of what customers pay for relative to the metal,” Henderson said.

Harleaux sees the same broader shift occurring at South Post Oak, where the company evaluates its product mix based not only on commodity prices but also on labor, equipment, logistics and customer value.

“I think this market is encouraging

recyclers to understand that our value cannot be based solely on what is on the scale,” Harleaux said. “Commodity pricing will always move. The businesses that remain strong will understand where else they create value and build their service models accordingly.”

Moving closer to the end user

Direct relationships with mills, foundries, smelters and other end users can provide recyclers with better visibility into demand while reducing dependence on intermediaries. Henderson said his companies increasingly work directly with precious-metal smelters and aluminum remelt facilities, while Solar Panel Recycling’s Georgia operation is located within a major glass consumer’s facility, reducing transportation requirements.

Harleaux also considers relationships an important source of market intelligence. “In a volatile environment, information is incredibly valuable,” she said. “The closer you are to your customers and downstream partners, the better positioned you are to make informed decisions rather than reactive ones.”

Customers are also increasingly interested in documentation and traceability. Utilities and asset owners, for example, may want information about where materials went, their purity and whether they remained in domestic markets.

“Customers increasingly want documentation as much as they want a check,” Henderson said, making reporting and traceability another way recyclers can differentiate their services.

Preparing for the upcoming year

Looking ahead, trade policy, infrastructure demand and domestic processing capacity are likely to remain major influences on metal prices. Industry experts agree that the pace of grid and data-center development will affect copper demand, while the availability of domestic refining, remelting and processing capacity will influence how vulnerable U.S. recyclers are to international disruptions.

Harleaux is also watching how manufacturers respond to higher material costs, including whether they turn to alternative materials, change production methods or pass costs along to consumers. Those choices can ultimately reshape the recycling stream itself.

“What companies manufacture with today becomes what our industry will recover tomorrow,” Harleaux said.

For recyclers, preparing for continued volatility is less about predicting the next price spike than building operations that can withstand uncertainty. That means maintaining strong customer and downstream relationships, producing clean and consistent material, turning inventory efficiently, diversifying revenue streams and staying informed about policy changes.

At South Post Oak, Harleaux indicated that changing markets may influence individual decisions, but they do not change the company’s fundamental approach. “Volatility may change some of the decisions we make, but it does not change our core,” she said. “We will continue to lean into trust, relationships, education and community impact.”



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HYDRAULICS:	
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WEIGHT	61,000 LBS.
HEIGHT	13'3"

HYDRAULICS:	
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METALS

World crude steel production drops

World crude steel production for the 70 countries reporting to the World Steel Association (worldsteel) was 149.2 million tonnes (Mt) in July 2026, a 0.3 percent decrease compared to July 2025. **Crude steel production by region**
Africa produced 2.0 Mt in July 2026, up 6.1 percent on July 2025. Asia and Oceania produced 109.4 Mt, down 1.2 percent. The EU (27) produced 10.5 Mt, up 3.8 percent. Europe, Other produced 3.7 Mt, up 5.8 percent. The Middle East produced 3.8 Mt, down 13.4 percent. North America produced 9.6 Mt, up 4.9 percent. Russia & other CIS + Ukraine produced 6.7 Mt, up 2.2 percent. South

America produced 3.6 Mt, up 2.8 percent. **Top 10 steel-producing countries**
China produced 76.9 Mt in July 2026, down 3.6 percent on July 2025. India produced 14.4 Mt, up 1.9 percent. The United States produced 7.4 Mt, up 4.4 percent. Japan produced 6.9 Mt, up 0.4 percent. Russia is estimated to have produced 5.7 Mt, up 3.3 percent. South Korea produced 5.7 Mt, up 6.4 percent. Turkey produced 3.4 Mt, up 7.0 percent. Germany is estimated to have produced 2.8 Mt, up 3.0 percent. Brazil produced 2.8 Mt, up 0.1 percent. Viet Nam produced 2.7 Mt, up 34.7 percent.

Top steel-producing countries				
	Jul 2026 (Mt)	% change Jul 26/25	Jan-Jul 2026 (Mt)	% change Jan-Jul 26/25
China	76.9	-3.6	577.0	-3.1
India	14.4	1.9	101.1	6.1
United States	7.4	4.4	50.2	6.0
Japan	6.9	0.4	47.3	-0.3
Russia (e)	5.7	3.3	38.1	-6.1
South Korea	5.7	6.4	37.4	2.7
Turkey	3.4	7.0	23.2	7.9
Germany (e)	2.8	3.0	21.4	8.1
Brazil	2.8	0.1	19.1	-1.2
Vietnam	2.7	34.7	17.9	28.0

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

AISI releases statistical report on steel industry

The American Iron and Steel Institute (AISI) has released its 2025 Annual Statistical Report (ASR), which provides comprehensive data on the American steel industry and select data on the North American steel industry as a whole. “The 2025 Annual Statistical Report underscores just how vital it is for our industry to have a clear, data-driven picture of where we stand,” stated Kevin Dempsey, president and chief executive officer of AISI. “In a moment when trade policy and market conditions are shifting so quickly, the ASR gives analysts and the broader steel community a reliable foundation for understanding the domestic steel industry. It remains the gold standard for steel statistics and analysis.”
The report highlights that, in 2025, shipments from domestic steel mills measured 91 million net tons (NT), up five percent from the previous year. U.S. raw steel production was 90 million net tons in 2025, a three percent increase from 2024. The report also shows that total steel

imports into the United States decreased by 13 percent in 2025 compared to the previous year, while finished steel imports decreased by 17 percent over the same period and captured an 18 percent share of apparent steel consumption. The report also notes that the construction and automotive industries continued as the leading end-use markets for shipments of U.S. steel products.
The AISI ASR is the most comprehensive reference of its kind, providing extensive coverage of the American steel industry and selected statistical data on the Canadian, Mexican and world steel industries. It features dozens of charts and graphs, including selected statistical highlights on shipments, apparent supply, imports, employment and raw steel data over a 10-year period; selected financial highlights; shipments by products and markets over a 10-year period; raw steel production (including selected state-level production data) and capability utilization; and detailed imports and exports data.

Steel imports up 7.4 percent

Based on preliminary Census Bureau data, the American Iron and Steel Institute (AISI) reported that the U.S. imported a total of 2,260,147 net tons (NT) of steel in July 2026, including 1,561,961 NT of finished steel (up 7.4 percent and 6.3 percent, respectively, vs. June 2026). Total and finished steel imports are down 19.6 percent and 22.1 percent, respectively, year-to-date vs. 2025. Over the 12-month period August 2025 to July 2026, total and finished steel imports are down 21.6 percent and 25.3 percent, respectively, vs. the prior 12-month period. Finished steel import market share was an estimated 17 percent in July and is estimated at 16 percent over the first seven months of 2026.
Key steel products with a significant import increase in July compared to June are wire rods (up 53 percent), hot rolled bars (up 52 percent), oil country

goods (up 45 percent), and standard pipe (up 36 percent). Products with a significant increase in imports over the 12-month period August 2025 to July 2026 compared to the previous 12-month period include heavy structural shapes (up 44 percent).
In July, the largest suppliers were South Korea (556,000 NT, up 32 percent vs. June), Canada (280,000 NT, down 5 percent), Brazil (253,000 NT, up 3 percent), Mexico (192,000 NT, up 0.3 percent) and Vietnam (150,000 NT, down 0.4 percent). Over the 12-month period August 2025 to July 2026, the largest suppliers were South Korea (3,430,000 NT, up 20 percent compared to the previous 12-months), Canada (3,268,000 NT, down 42 percent), Brazil (3,001,000 NT, down 33 percent), Mexico (2,103,000 NT, down 39 percent) and Vietnam (1,244,000 NT, up 9 percent).

U.S. Imports of Steel Mill Products by Country of Origin (thousands of net tons)									
COUNTRY	JULY 2026 PRELIM	JUNE 2026 FINAL	% VAR. JULY VS. JUNE	YTD 2026 (7 MON.)	YTD 2025 (7 MON.)	% VAR. 2026 VS. 2025	AUG. 2025 TO JULY 2026	AUG. 2024 TO JULY 2026	% VAR.
Canada	280	294	-4.7%	1,741	3,110	-44.0%	3,268	5,644	-42.1%
South Korea	556	422	31.8%	2,407	1,782	35.1%	3,430	2,870	19.5%
Brazil	253	245	3.4%	1,650	2,883	-42.8%	3,001	4,453	-32.6%
Mexico	192	192	0.3%	1,228	2,029	-39.5%	2,103	3,422	-38.5%
Vietnam	150	151	-0.4%	894	474	88.8%	1,244	1,139	9.2%
Japan	79	108	-27.0%	621	602	3.2%	1,136	1,048	8.4%
Taiwan	73	70	4.0%	493	743	-33.6%	876	1,149	-23.8%
Germany	67	58	15.3%	395	738	-46.5%	811	1,253	-35.3%
India	53	64	-18.2%	353	336	5.0%	591	461	28.1%
Turkey	30	40	-25.1%	316	318	-0.4%	560	433	29.4%
China	47	38	22.0%	261	286	-8.6%	436	480	-9.1%
Netherlands	33	29	15.8%	190	335	-43.4%	392	622	-36.9%
Argentina	0	35	-100.0%	145	41	256.9%	344	101	240.2%
United Arab Emir.	0	2	-97.9%	123	184	-32.8%	327	406	-19.6%
Indonesia	88	68	29.4%	247	97	155.4%	383	131	193.4%
All Other	361	291	24.2%	2,487	2,928	-15.1%	3,090	3,728	-17.1%
Total	2,261	2,105	-7.4%	13,552	16,886	-19.7%	21,991	27,974	-21.4%
memo EU-27	302	233	29.5%	1,615	2,615	-38.3%	2,981	4,434	-32.8%



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METALS

Canada escalates tariffs on U.S. metals

Canada has implemented a new round of retaliatory tariffs on U.S. imports, with steel, aluminum and related metal products among the most heavily targeted sectors. The measures, which took effect September 8, apply tariffs ranging from 15 percent to 50 percent on approximately C\$27.6 billion (US\$20 billion) of U.S. goods.

The metals provisions represent a particularly significant escalation for manufacturers, fabricators, distributors and other businesses that rely on cross-border flows of steel and aluminum. More than 300 steel and aluminum products and derivatives are included in the new measures. U.S. steel and aluminum products that previously faced a 25 percent Canadian tariff are now subject to a 50 percent rate, while a range of steel and aluminum derivative products will face tariffs of 25 percent.

For North American metals markets, the new duties add another layer of cost and uncertainty to an already highly disrupted supply chain. Steel and aluminum move extensively between the United States and Canada, supporting industries ranging from automotive and construction to machinery, appliances, energy and general manufacturing.

The Canadian action follows the United States' expansion of tariffs on Canadian products, including a 50 percent tariff on a broad range of Canadian goods. Ottawa's countermeasures

also extend beyond metals to products including agricultural goods, appliances, pulp and paper, flooring, electronics and other manufactured products.

The steel and aluminum provisions are particularly consequential because they affect both primary metal products and downstream products made from those materials. The tariff schedule includes products such as flat-rolled steel and aluminum bars, along with numerous derivative products.

The increased duties could put additional pressure on U.S. exporters seeking to maintain their Canadian market share and on Canadian companies that depend on American metal inputs. The measures also create the potential for price and sourcing disruptions as companies reassess supply agreements, inventories and cross-border logistics.

Industry participants will be watching closely for changes in Canadian demand, shifts in sourcing toward domestic or third-country suppliers, and any resulting changes in regional steel and aluminum pricing.

Canada's new measures cover 629 classifications of U.S. goods and impose rates of 15 percent, 25 percent or 50 percent, depending on the product. The government has said the measures are intended as a response to U.S. trade actions and to encourage a return to a more stable trading relationship.

Cleveland-Cliffs redirects clean steel funding to coal

Cleveland-Cliffs and the Department of Energy announced plans to continue the use of coal at Cleveland-Cliffs' Middletown Works steel mill, abandoning previously announced plans to transition toward clean energy. The company was originally selected in March 2024 for up to \$500 million from the U.S. Department of Energy (DOE) to replace Middletown's coal-fired blast furnace with a 2.5-million-tonne hydrogen-ready Direct Reduced Iron (DRI) plant and two electric melting furnaces.

Announcing that award in 2024, Cleveland-Cliffs said the project would make Middletown "the most advanced, lowest GHG-emitting integrated iron and steel facility in the world," securing 2,500 union jobs, adding 170 permanent positions, and creating 1,200 construction jobs, while cutting production costs by \$150 per net ton of liquid steel, which the company valued at \$450 million in annual savings.

The Department of Energy's Industrial Demonstrations Program was established specifically to solicit "first- or early-of-a-kind" technologies capable of spearheading American industrial decarbonization. Selected from over 400 competitive applicants, Middletown Works was a centerpiece of that effort, the nation's first

demonstration of a unionized, coal-based integrated mill modernizing to cleaner steelmaking.

Elena Saxonhouse, managing attorney with Sierra Club said, "Cleveland Cliffs is recklessly going back on its word when it promised, back in 2024, to reduce air pollution in the Middleton community by using federal investments in the newest cleanest steel making technology. Instead, Cleveland Cliffs is doubling down on pollution with older-generation, coal-based production. In allowing this about-face, DOE is redirecting half a billion taxpayer dollars away from Congress's intended purpose. Using this massive amount of money to reinvest in out-of-date production methods proven to cause harm to people and the environment is bad business and bad policy."

The revised project abandons that vision. The company is currently seeking a permit to install what the new plan calls an "advanced" natural gas cogeneration plant, an otherwise standard efficiency technology that burns blast furnace gas to raise steam and generate electricity. Cleveland-Cliffs already operates this technology at its other blast furnace operations, Cleveland Works, Burns Harbor, Indiana Harbor, and Dearborn Works.

AR

Scrap Metals

MarketWatch

Commodity		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5
FERROUS						
#1 Bushelings	per gross ton	\$449.00	\$430.00	\$425.00	\$435.00	\$450.00
#1 Bundles	per gross ton	429.00	410.00	405.00	415.00	435.00
Structural	per gross ton	372.00	370.00	369.00	368.00	369.00
#1 & #2 Mixed Steel	per gross ton	301.00	300.00	301.00	309.00	320.00
Crushed Auto Bodies	per gross ton	210.00	214.00	220.00	223.00	245.00
Shredded Auto Scrap	per gross ton	429.00	415.00	418.00	419.00	419.00
NON FERROUS						
#1 Copper Bare Bright	per pound	6.50	6.40	6.00	5.89	6.21
#2 Copper Wire & Tubing	per pound	6.30	6.20	5.80	5.69	6.01
Aluminum Cans	per pound	.99	.97	.98	.97	.98
Al/Cu Radiators	per pound	3.30	3.15	3.10	3.11	3.15
Aluminum Radiators	per pound	.45	.40	.42	.41	.40
Heater Cores	per pound	1.46	1.41	1.42	1.40	1.45
Stainless Steel	per pound	.69	.69	.68	.67	.68

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

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Nucor to invest \$59 million to expand production capabilities at its Indiana facility

Nucor Corporation will invest \$59 million to expand its Vulcraft Indiana manufacturing facility in St. Joe, Indiana, adding capabilities to produce steel grating products. The investment is expected to create 20 new full time jobs, adding to the more than 300 teammates currently employed at the facility.

"We are pleased to be growing our Vulcraft business in Indiana with this investment to better serve our customers and strengthen our downstream production capabilities, advancing our mission to Grow the Core and Expand Beyond," said John Hollatz, executive vice president of fabricated construction products.

This marks Nucor's fourth major investment in Indiana in recent years. In 2022, the company announced a \$290 million investment to modernize its sheet mill operations in Crawfordsville. The following year, Nucor announced plans to build a \$115 million utility infrastructure production facility nearby. The company also invested \$28.5 million to build an insulated metal panel production facility in Waterloo, adjacent to its existing Nucor Building Systems Indiana campus. That

facility began operations in 2021.

Together, these investments have created approximately 300 new Nucor jobs in Indiana. Today, Nucor employs more than 2,600 teammates at more than a dozen locations across the state.

Nucor acquired Vulcraft in 1962, marking the company's entrance into the steel industry. From a single production facility in South Carolina, Nucor expanded the Vulcraft business and ultimately made the decision to begin producing its own steel. Vulcraft Indiana opened in 1972 as Nucor's fifth Vulcraft facility and today is one of nine Vulcraft facilities operating across North America.

Vulcraft is the nation's leading producer of open-web steel joists, joist girders and steel decking, which are used primarily in nonresidential construction. These products serve as structural support systems for roofs and floors in warehouses, data centers, manufacturing facilities, retail stores, shopping centers, schools and hospitals as well as in some multi-story residential buildings. Vulcraft has an annual joist and deck production capacity of approximately 1.2 million tons.

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DEVELON has expanded its -9 Series lineup with the launch of the 33 metric-ton DX300LC-9 crawler excavator. Featuring a fully electro-hydraulic control system, the machine delivers up to 8 percent greater fuel efficiency. Ideal for heavy duty applications including recycling, the DX300LC-9 features active safety solutions like DEVELON E-Stop and Virtual Walls to protect jobsite crews. Operators benefit from a weighing system for precise truck loading and standard Prognostics and Health Management technology to track machine health and maximize uptime protection.

GALBREATH LAUNCHES NEW CH8 CONTAINER HANDLER



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Galbreath has launched the CH8 Container Handler, a redesign built around fleet operator feedback. The CH8 adds a new 360 degree slew drive, letting operators dump full containers in either direction and sheds nearly 500 pounds compared to the previous CH8000R model without sacrificing capacity. It handles front load containers up to 10 yards, rear load containers up to 6 yards and loads up to 8,000 pounds. A modular, bolt-on design and weld-free installation make setup faster, and fleets can configure the unit with towing, lighting, camera and toolbox options. The CH8 is available now through Galbreath's dealer network.

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PLASTICS

Plastics machinery shipments mixed as investment grows

The Plastics Industry Association (PLASTICS) Committee on Equipment Statistics (CES) released its second-quarter 2026 report, showing softer shipment activity and stronger new orders and broader growth in U.S. equipment investment.

Primary plastics machinery shipments totaled an estimated \$235.8 million in Q2. While shipments remained soft, stronger new orders and increased U.S. equipment investment point to a strengthening

pipeline for machinery demand. The report also found:

- Twin-screw extrusion machinery shipments increased 25.4 percent from Q1.
- 39 percent of CES survey respondents expect market conditions to improve over the next 12 months.
- U.S. plastics machinery exports totaled \$755.8 million in Q2, generating a \$480.3 million trade surplus, a 24.1 percent increase from a year earlier.

Plastic Energy founder Monreal returns as CEO

Plastic Energy, a global leader in chemical recycling, confirmed a new ownership structure and the return of founder Carlos Monreal as chief executive officer. The transition marks the start of a new chapter for the company, led by Monreal's entrepreneurial vision, technical expertise and over two decades of industry knowledge.

Plastic Energy's proprietary TAC™ technology will remain at the core of the business, with operations and development continuing across Europe and at research labs at Loughborough University in the UK. Proven at industrial scale for over ten years, the advanced recycling technology has already processed over 40,000 tonnes of hard-to-recycle plastics to date, underpinned partnerships

with leading petrochemical companies and achieved industry-leading regulatory certifications.

The wider chemical recycling sector has faced a challenging investment environment, shaped by volatile virgin polymer economics and prolonged regulatory uncertainty. Plastic Energy sees this as a decisive moment for the industry in which the core technology has matured, and industrial capacity has been proven.

Policymakers must now match the commitment made by the private sector by providing clear, stable and investment-friendly regulation in support and recognition of companies who have invested early to close the loop on the circular economy of plastics.

Bill introduced to standardize recycled plastic claims

U.S. Senators Cory Booker (D-NJ) and Adam Schiff (D-CA) introduced the Tracking Plastic Act, which would implement a standardized process for tracking recycled materials to address mislabeling and fraud by companies, reduce errors and verify the origins of recycled plastic content, helping Americans better understand the environmental impact of the products they are buying. The legislation would crack down on misleading recycled plastic claims by establishing the first standardized federal system to track and verify recycled plastic content throughout the supply chain. It would protect consumers from deceptive environmental claims, hold companies accountable for the accuracy of their labeling, and strengthen confidence in America's recycling system.

Companies currently use inconsistent methods to measure and report recycled plastic content, making it difficult to verify claims and leaving consumers vulnerable to misleading or inaccurate labeling. The Tracking Plastic Act would create a transparent, science-based framework for tracing recycled plastic content, improving accountability, reducing fraud and giving Americans confidence that products marketed as environmentally responsible are backed by credible data.

"Every time Americans pick up a product at the store, they should be able to trust what they see on the label and not have to wonder whether the products they buy are

truly helping to reduce plastic waste," said Senator Booker. "This legislation will give consumers the honest information they need, strengthen our recycling systems, and ensure companies are accountable for addressing the plastic pollution crisis."

The Tracking Plastic Act would establish a federal working group on recycled plastic content traceability with representatives from the Environmental Protection Agency, the Federal Trade Commission, the Department of Agriculture, the National Oceanic and Atmospheric Administration, the Department of State, the National Institute of Standards and Technology, the National Laboratory of the Rockies, institutions of higher education and the National Academy of Sciences.

The working group would:

- Develop recommendations to improve the measurement, traceability, and reporting of recycled plastic content across applicable sectors of the economy; and
- Develop recommendations to increase the use of post-consumer resin.

In addition to Booker and Schiff, the legislation is cosponsored by U.S. Senators Jeff Merkley (D-OR) and Ron Wyden (D-OR).

The Tracking Plastic Act is endorsed by the Association of Plastic Recyclers, Recycling Partnership, World Wildlife Fund, Ocean Conservancy and Monterey Bay Aquarium.

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WASTE

Casella Waste and Waga Energy bring RNG facility online at McKean Landfill

Casella Waste Systems, Inc., a regional solid waste, recycling and resource management services company in the Eastern United States, and Waga Energy, a global expert in the production of Renewable Natural Gas (RNG) from landfills, announced the start of operations of the RNG production facility at the McKean Landfill in Mount Jewett, Pennsylvania.

The McKean facility is the third to come online this year, following the successful commissioning of facilities at the Chemung County Landfill and the Hyland Landfill. Together, the three projects complete the partnership agreement signed in 2023.

“Bringing this facility online at our McKean landfill is another important step in our efforts to recover more value from the materials we manage,” said Ned Coletta, president and chief executive officer of Casella. “Our partnership with Waga Energy has always been focused on collaborating to leverage each other’s strengths, and it’s extremely gratifying

to see the third facility come online and producing as anticipated.”

The facility uses Waga Energy’s patented WAGABOX® technology to upgrade landfill gas into pipeline-quality RNG. With 2,000 SCFM of installed processing capacity, McKean can generate up to 407,000 MMBtu (120 GWh) of renewable gas annually. Production will ramp up progressively as landfill gas volumes increase at the site.

The RNG produced on-site is injected directly into the National Fuel Gas network, supplying the region with a renewable alternative to fossil natural gas. The project is expected to avoid 31,000 tons of CO₂-equivalent emissions each year, according to U.S. Environmental Protection Agency standards.

Under the terms of the agreement, Waga Energy fully funded the construction of each facility and will own and operate each of them for 20 years, while Casella and Waga Energy share the revenue generated from RNG sales.

SWANA report highlights waste-to-energy benefits

The Solid Waste Association of North America (SWANA) has released a new report from its Applied Research Foundation (ARF), Clarifying the Benefits of WTE Facilities for County and Provincial Elected Officials. The report is designed to help local elected officials, policymakers and solid waste leaders better understand the role waste-to-energy (WTE) facilities can play in an integrated solid waste management system.

County and provincial elected officials are often responsible for making long term decisions about waste disposal capacity, infrastructure investment, recycling programs and public communication around solid waste systems. SWANA’s new ARF report provides a clear, accessible resource to support those decisions and help communities evaluate WTE facilities based on documented performance, operational experience, and public policy considerations.

Developed with input from the SWANA ARF Waste Conversion and Energy Recovery (WCER) Research Group, the report reflects input from facility owners and subject matter experts. It focuses on the need to move public conversations about WTE toward a more complete understanding of the benefits.

“County and provincial elected officials are being asked to make complex, decisions about how their communities manage residual waste,” said Carolyn F. Muller, acting chief executive officer of SWANA. “This report gives them a practical, research-based resource to better understand waste-to-energy facilities, ask informed questions and communicate clearly with residents. SWANA’s Applied Research Foundation continues to provide timely, useful research that helps public officials and solid waste professionals make decisions that protect public health, support responsible resource management and strengthen local infrastructure.”

The report identifies several key benefits of WTE facilities for local governments and communities, including its ability to provide an option for local management of waste and long-term disposal capacity. The report includes case studies and examples from communities that have implemented WTE facilities, which illustrate how WTE facilities can reduce landfill dependence, extend landfill capacity, support local responsibility for waste management and provide reliable energy recovery services.

The report also addresses common objections to WTE facilities, including concerns related to siting, public opposition, initial costs and environmental impacts. SWANA developed the report to help elected officials respond to these concerns with clear, fact-based information and to support more informed public dialogue about the role of WTE in managing residual solid waste.



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BUSINESS BRIEFS

DSNY appoints Joseph Antonelli as first deputy commissioner

■ DSNY Commissioner Gregory Anderson appointed Joseph Antonelli as the department's first deputy commissioner, a position that oversees the agency's administrative, financial and support functions and the approximately 2,000 civilian staff who provide critical support for the Department's uniformed operations. Antonelli previously served as DSNY's deputy commissioner of management and budget and chief financial officer.

Reporting directly to the Commissioner, The First Deputy Commissioner is the top ranking civilian employee and serves as the lead executive responsible for the department's bureaus of solid waste management, support services, human capital, management and budget, strategic initiatives, and information technology. Along with the commissioner and chief of department, the first deputy commissioner serves as a member of the department's core leadership team, ensuring the effective management and implementation of the agency's strategic priorities.

In his role as deputy commissioner, Antonelli directed all financial and procurement operations and oversaw management analysis for the agency, ensuring appropriate resource allocation to support efficient public service delivery. He evaluated agency-wide efficiency and implemented strategies to reduce and mitigate the use of overtime for both uniform and civilian staff.

Prior to joining DSNY, Antonelli served as deputy commissioner for management & budget for the NYC Office of Technology and Innovation.

Volvo Construction Equipment expands U.S. footprint

■ Volvo Construction Equipment (Volvo CE) is significantly expanding its U.S. footprint, resulting in more than 50 percent of its North American machine supply being produced at its Shippensburg, Pennsylvania facility. Less than a year after announcing plans to localize more machine assembly, the company is delivering its first American-built excavators and larger wheel loaders to customers. A total of 11 additional models will be produced in Shippensburg, shortening customer lead times by more than six weeks.

The expansion brings Volvo CE's North American production portfolio to 30 machine models, including excavators, wheel loaders and compactors. With the most recent investment of \$40 million, Volvo CE has invested over \$1.4 billion since 2007 to triple its annual output capacity and build workforce skills to support growth and increased digitalization.

Volvo CE acquired the site and its road development division from Ingersoll Rand in 2007 and established its North American headquarters there in 2012. Currently, over 750 people are employed at the location.

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Rising auto repair costs drive salvage growth

by MAURA KELLER

mkeller@americanrecycler.com

The economics of collision repair are changing the path a damaged vehicle takes after an accident. As repair costs rise, vehicles that might once have been repaired are increasingly being declared total losses, creating more inventory opportunities for auto recyclers while introducing new challenges around acquisition costs, vehicle technology, parts testing and data.

For auto recyclers, the issue extends beyond the number of vehicles arriving at salvage auctions. The increasing complexity of modern vehicles is changing which components have value, how those parts must be evaluated and what information recyclers need to provide to repairers and consumers.

"Modern vehicles contain far more complex components than older vehicles, such as cameras and radar sensors," said Luke Oswald, automotive specialist at Wheels Away. "Due to these additional complexities, it takes a mechanic more time to diagnose an issue with a modern vehicle, which increases the cost of repair."

Greg Bunch, chief executive officer of Aspen Auto Clinic, who owns six Colorado locations and is an ASE-certified Master Technician and automotive business coach, sees the same dynamic from the repair side. Parts prices and labor rates remain important, but advanced vehicle technology has become a significant cost multiplier. A repair that once involved replacing a component may now require diagnostic scanning, programming, aiming or calibration.

"The visible damage may not look dramatically worse than it did several years ago, but safely restoring the entire vehicle is substantially more complex," Bunch said.

In the CCC Intelligence Solutions report, "CCC Intelligent Solutions | Crash Course 2026: Complexity Compounds," it was reported that the preliminary average total cost of a repairable claim reached \$4,818 in 2025, a 1.7 percent increase from 2024. At the same time, 28.3 percent of repairable estimates included a calibration in 2025, representing roughly a 30 percent increase in the share of estimates involving that operation.

For the recycling industry, those trends matter because the higher the cost of returning a damaged vehicle to the road, the more likely the economic calculation will favor a total loss.

The economics of a total loss

A vehicle does not have to be physically impossible to repair to be declared a total loss. Insurers weigh estimated repair costs against the vehicle's actual cash value and other expenses associated with returning it to service.

Bunch points to supplements, rental-car costs, cycle time and anticipated salvage value as additional considerations. As repair costs increase, the economic margin for repairing an older vehicle can disappear quickly.

"A vehicle can be physically repairable and still be an economic total loss," Bunch said.

That distinction is particularly important for older vehicles, where relatively modest collision damage can represent a substantial percentage of the vehicle's pre-loss value. Oswald noted that most vehicles on American roads are more than 12 years old, making the repair-versus-total-loss calculation especially significant when an older vehicle has relatively little market value.

More than half of vehicles now feature advanced driver assistance systems (ADAS), according to Oswald, including cameras, radar sensors, ultrasonic sensors and GPS. Even minor damage to a bumper containing ADAS equipment can result in diagnostic testing, calibration and potential hidden-damage costs.

Oswald said that more than 20 percent of claims currently result in a vehicle being totaled, as the additional expense associated with increasingly sophisticated systems pushes repair estimates higher.

CCC reported that total-loss frequency reached a record 23.1 percent of claims in 2025, according to Bunch. For recyclers, that represents a potentially significant increase in vehicles entering the salvage stream.

State regulations add another layer to the equation. Total-loss rules vary by jurisdiction, with some states using percentage-based thresholds and others applying formulas incorporating repair



The increasing complexity of modern vehicles is changing which components have value, how those parts must be evaluated and what information recyclers need to provide to repairers and consumers.

costs and salvage values. Insurers also have their own estimating practices.

More salvage doesn't equal more profit

At first glance, an increase in total-loss vehicles appears to benefit auto recyclers. More vehicles entering the salvage stream can mean more engines, transmissions, body panels, lamps, wheels, electronics and other components available for resale.

"There's lots of ways an increase in total-loss vehicles impacts the receiving salvage or recycling companies," Oswald said. "The biggest difference is that it'll mean there is more inventory for reusable parts for auto recyclers."

That can expand the variety of components available, including electronics that can be resold or repurposed. But increased volume does not automatically translate into increased profitability.

"More total losses mean more potential inventory for recycled original equipment parts, rebuilders and material recovery," Bunch said. "That can expand the supply of quality assemblies and help lower the cost of other repairs."

The challenge is what happens between acquisition and sale. Recyclers must purchase vehicles at prices that leave room for a return, then transport, title, inspect and dismantle them, identify usable components, document their condition, store them and connect them with buyers.

Auction demand can also increase acquisition costs.

"As the vehicle becomes more electronic, the recycler's competitive advantage increasingly comes from data quality, testing, traceability, inventory systems and fulfillment rather than simply the number of vehicles in the yard," Bunch said.

A different kind of parts inventory

The changing composition of vehicles is also affecting what recyclers recover. Traditional mechanical and body components remain important, but modern vehicles contain an expanding collection of cameras, radar units, sensors, displays, electronic control modules, infotainment systems, lamps and power electronics.

Those parts can carry substantial value, but they also require greater scrutiny.

"It's definitely getting more valuable, but it's also more complex," Oswald said. "With so much technology in each car, radar sensors and infotainment systems, for example, can hold high resale value."

An ADAS component, however, cannot necessarily be treated like a conventional replacement part. Its application, collision history, mounting condition, software compatibility and ability to meet calibration requirements can all affect whether it can be safely reused.

See AUTO RECYCLING, Page B2

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Auto recycling

■ Continued from Page B1

“An ADAS sensor is not simply a used part with the correct connector,” Bunch said.

Testing is becoming increasingly important. Oswald said that many newer components require specialized testing and handling before they can be safely reused and resold, while failing to recover parts cleanly or allowing contamination can diminish their value.

OEM policies can further restrict reuse. Bunch points to Nissan and Infiniti, which prohibit salvaged or other secondary-market radar, camera and related ADAS components. Such restrictions directly affect what recyclers can sell and how they evaluate incoming vehicles.

Electric and hybrid vehicles present another opportunity – and another set of requirements. High-voltage batteries can represent valuable inventory, but recyclers need appropriate procedures for assessing condition, isolating batteries, handling and transporting them safely and determining whether a component has a viable second-life or recycling pathway.

“EVs, for example, require specialized handling and safe battery recovery,” Oswald said.

The emerging opportunity, therefore, is not simply to sell a part but to sell a part accompanied by reliable information about its condition and application.

“The future belongs to recyclers who can sell verified information along with the component,” Bunch said.

Recycled parts and the total-loss equation

The relationship between collision repair and auto recycling also works in the other direction. Greater use of recycled OEM parts can potentially help control repair costs and keep some vehicles below the total-loss threshold.

A recycled OEM component can offer original-equipment fit and construction at a lower price than a new OEM part. When the right component is available, the savings can make a meaningful difference in an estimate.

“The overall repair estimate can be kept lower because genuine used reconditioned OEM parts can be a lot cheaper than buying it new,” Oswald said. “In many cases this can be the deciding factor between repairing a car and writing it off.”

Bunch similarly sees recycled parts as one tool for controlling repair costs and avoiding unnecessary total losses.

“On the right repair, that cost difference can help keep the estimate below the total loss point while also returning a usable component to service instead of consuming the resources required to manufacture a new one,” he said.

However, not every component is an appropriate candidate for reuse. Structural components, restraints, one-time-use parts and certain ADAS components may be restricted by OEM procedures or lack sufficient evidence of condition and history.

Other barriers include matching parts to the exact vehicle, identifying hidden damage, grading components consistently, managing shipping and returns, providing interchange information, meeting insurer requirements and addressing warranty concerns. Oswald also points to repairer

and insurer policies that may require new genuine parts in certain circumstances, along with safety concerns surrounding critical components.

Better photographs, testing information, provenance, grading systems, predictable warranties and consistent interchange data can make recycled parts easier for repairers and insurers to specify.

The consumer supply problem

The total loss trend also has implications beyond collision repair and recycling. When a vehicle is totaled, its owner needs another vehicle, and replacement options are not always easy to find.

Bunch pointed to CCC data showing that there were approximately 12 million fewer vehicles 6 years old or newer in operation as of the third quarter of 2025 than in 2020.

Oswald also pointed to another indication of the changing market – vehicles selling for less than \$20,000 accounted for 55 percent of all vehicle sales in 2019, but only 31 percent in 2026. As affordable inventory becomes harder to find, consumers whose vehicles are totaled may discover that an insurance settlement based on pre-accident value does not provide enough money to purchase a comparable replacement.

Consumers may have to purchase a newer vehicle at a higher price or move into an older, higher mileage vehicle to stay within budget.

A higher total loss rate can therefore put additional pressure on an already constrained used-vehicle supply. The totaled vehicle may leave the consumer transportation pool, but its usable components can return to the market through automotive recycling, potentially helping repair other vehicles and reducing replacement-part costs.

Watching repairability

For recyclers, the future of the total loss market will depend on more than collision frequency. Bunch expects repair costs and total-loss frequency to remain structurally elevated, although several factors will influence the trajectory, including the spread of ADAS, the growing number of hybrid and electric vehicles, OEM restrictions on reused components, technician availability, calibration capacity, parts availability, used-vehicle values and salvage auction prices.

For auto recyclers, that uncertainty reinforces the importance of being prepared for both more volume and more complexity. The vehicles entering salvage may offer significant parts opportunities, but extracting that value requires sophisticated inventory management, accurate data, effective testing and a deeper understanding of increasingly electronic vehicles.

“The industry should focus on the complete economics of a safe repair rather than treating the lowest initial estimate as the goal,” Bunch said. “Better decisions made earlier can reduce supplements, cycle time, rental expense and unnecessary total losses while protecting the consumer.”

Today’s vehicles growing more reliant on plastics

Plastics are increasingly essential to making vehicles safer, lighter and more technologically advanced, and their role will continue to grow with the expansion of self-driving and electrified vehicles, according to a new report, *Plastics and Chemistry in Automobiles*, from the American Chemistry Council (ACC).

The report finds that the average North American vehicle contained 428 pounds of plastics and polymer composites in 2025, up 18 percent from just a decade ago. These materials account for more than half of a vehicle’s volume but less than 10 percent of its weight. Plastics make vehicles lighter, improving fuel efficiency and reducing fuel costs at the pump, while also enhancing safety. The role of plastics in the components that prevent accidents and protect occupants in an accident cannot be overstated: seat belts, airbags, sensors, cameras and radars enabling automated collision avoidance and driver assistance and structural components able to absorb greater crash energy than metals are all made with plastic, saving lives every day.

“Open the door to a modern vehicle and plastics help shape nearly every part of the experience, from the soft-touch dashboard, cushioned seats, touchscreen displays, lighted trim, steering wheel controls, rearview mirror and speakers, that make every drive more comfortable and connected,” said Gina Oliver, senior

director of durable markets at ACC. “Plastics are woven into the safety, style and everyday comforts drivers and passengers are accustomed to.”

The growing use of plastics highlights the need to recover and recycle more automotive plastics at the end of a vehicle’s life. Greater investments in the infrastructure to dismantle, sort and recycle automotive plastics are needed in the U.S. With advanced recycling technologies now capable of processing many of the specialized automotive plastics mechanical recycling can’t easily process, such as foam seat cushions, bumpers and battery housings, there is tremendous potential to greatly increase the amount of material recovered from a vehicle to recycle into new auto components.

Expanding automotive plastics recycling will require collaboration across automakers, parts suppliers, dismantlers, recyclers and plastic producers. Federal policy that provides regulatory certainty for advanced recycling facilities, clear standards for recycled-content claims, and helps align stakeholders across the auto recycling chain can accelerate this transition. Pilot projects at Oak Ridge National Laboratory and the Global Impact Coalition demonstrate the feasibility of recovering plastics from automobiles and the potential for broader commercial deployment.

Covestro partners to promote recyclable automotive lighting

Demonstrating “The Material Effect” in action, Covestro announced its participation in the KOLLEKT research project – a publicly funded, interdisciplinary consortium dedicated to developing recyclable product concepts for automotive lighting, mechatronic and electronic components. The three-year project, funded by the German Federal Ministry for Research, Technology and Space (BMFTR) under the CircularGlowUp funding framework and supervised by the Karlsruhe Project Management Agency (PTKA), addresses one of the automotive industry’s most pressing challenges: how to keep materials in use longer, reduce resource consumption, and build genuinely circular value chains.

KOLLEKT brings together FORVIA HELLA as coordinator alongside partners BMW, Covestro, Geba, Fraunhofer IEM, Fraunhofer UMSICHT, the University of Paderborn, Hamm-Lippstadt University of Applied Sciences, the Helmholtz-Zentrum Dresden-Rossendorf (HZDR), and SW Maschinenservice. The project runs from June 2026 to May 2029, with a total BMFTR funding volume of €4.371 million (approximately \$5.1 million U.S.) including project lump sums.

From headlamp to tomorrow’s resource

The automotive industry faces growing pressure from resource scarcity, supply security concerns, and tightening regulatory requirements – most notably the EU End-of-Life Vehicles (ELV) Regulation.

Technological hurdles, cost pressure, and insufficient product recyclability have so far prevented efficient plastics cycles from becoming established at scale. KOLLEKT directly addresses this gap by placing “Design for Circularity” at its core – product design optimized for recyclability from the very beginning, complemented by four R-strategies: Repair, Re-Use, Remanufacture, And Recycle. KOLLEKT researches how future lighting components can be made repairable, reusable and recyclable – and what production and logistics processes this requires.

Covestro’s role: materials that enable circularity

As a key materials partner in KOLLEKT, Covestro contributes its deep expertise in high-performance polymers and sustainable material solutions – working across the full circular value chain, from supporting circular product design and material concepts through to the evaluation of recycling pathways for polycarbonate. Covestro’s Makrolon®, Bayblend® and Apec® materials are among the most widely used plastics in automotive lighting applications, and bringing these materials back into high-quality use cycles is central to the project’s ambition. Covestro’s involvement ensures that material properties, recycle quality and end-of-life behavior are fully considered from the design stage onward – a prerequisite for true circularity.



Harry Hansen with U-Pick-It/U-Pull-It

by **MATT JONES**
news@americanrecycler.com



Harry Hansen was driving a tow truck when the seeds for the business known today as U-Pick-It were planted. He was looking for something part time and got in the habit of hauling junk cars.

“I did that on the side and then I quit the tow truck driving job and just hauled cars,” explains Hansen. “I would haul cars for different people and some of them were in salvage yard businesses and they seemed to do well. I found a yard that was for sale and I bought it.”

In 1979, Hansen’s Truck Salvage opened in Nebraska. In 1986 Hansen launched a new endeavor known as U-Pull-It. The business focused on the same business model as U-Pick-It does today – a site where customers can come, trawl through the yard and pick out the parts they wanted on their own. Hansen admits this was not the way he had originally intended to pursue the business.

“Absolutely not,” he said emphatically. “I sold parts. Actually, I sold the parts yard to my son about 15 years ago. The U-Pull-It/U-Pick-It thing was just a different concept on part charge, but I was selling parts. The problem with the ‘you pull it/you pick it’ concept is most of the money is derived from scrap. So that’s how I got into scrap.”

Today, the business operates in five locations, across three states – U-Pull-It in Lincoln and Omaha, Nebraska, as well as Des Moines, Iowa and U-Pick-It in Prescott and Flagstaff, Arizona. There is little difference between U-Pick-It and U-Pull-It – the U-Pull-It name was simply unavailable for use in Arizona. Each site is open seven days a week and has a staff that ranges between 15 and 30, depending on the site and the number of truck drivers.

Asked about what the experience at U-Pick-It is like for a customer, Hansen explains that they pay an admission fee and are able to explore the yard for whatever part they need. If someone needs door glass, for example, all door glass runs the same price, regardless of what kind of vehicle it came from. The vehicles themselves are brought in from as many different sources as possible – including private customers, salvage pools and others. “That’s our business, we buy old cars,” added Hansen.

Upon entering the yard, visitors are encouraged to consult with staff about available vehicles – the business keeps an inventory of which vehicles are present in the yard, but not for individual parts. Wheelbarrows, carts and engine hoists

are provided to assist in hauling parts at no additional charge. Basic tools such as wrenches, screwdrivers and pliers are available for loan, but bringing your own tools to remove parts is recommended. Visitors are also encouraged to bring a lubricant such as WD-40 to help coax any stuck parts, as well as a flashlight to be able to see parts in more recessed areas of the vehicle.

U-Pick-It uses Ford brand rollbacks and wreckers to pick up cars, for a specific reason – they’re the only manufacturer that builds gas powered vehicles in that class. That serves a very effective purpose for the business because they can actually salvage much of their gas from the cars that they buy. Hansen says that they used to have to pay to have the disused gas taken away, to the tune of four dollars per gallon. But since 1992, they have utilized gas powered vehicles.

“It gets rid of the gas problem and it’s also free fuel. It’s not as clean as fuel you’d buy from a gas station, but it works out well.”

On the topic of what kind of infrastructure is required for this sort of business, Hansen cited a good drain system as crucial when dealing with junked old cars. Draining gas and oil out of vehicles ensures that those fluids don’t leak into the yard.

Another essential need for the business is an understanding of the local rules and regulations that govern the industry. As a business entity that operates in three different states, U-Pick-It must be familiar with three different sets of regulations. That being said, Hansen indicates that at a high level they are fairly similar.

“I never say ‘this is the rule, you have to do this or you have to do that,’ because every state is different. But it’s basically the same thing. You have to clean the vehicles out so you don’t pollute the ground. Each state, though, has its own requirements for how they want you to do it. There’s no hard and fast rule because every state’s different. The federal government changes laws too. We pay attention to what the laws are and make sure we follow them.”

On how the auto salvage and parts industry has changed during his career, Hansen acknowledged frankly that they used to sell more parts from older cars. Now they don’t sell nearly as much per car. In the American Recycler September “A Closer Look” column, Tom Szaky of TerraCycle indicated that a significant challenge in the general recycling industry is the fact that products are made as cheap as possible, leaving less value to be recycled. Hansen observes a somewhat different phenomenon in the auto salvage sector.

“A fuel injection part or something

like that is probably worth way more than what a carburetor was back in the day,” explained Hansen. “But parts are less interchangeable and more vehicle-specific.”

Asked about the biggest challenge for U-Pick-It in 2026, Hansen cited government regulations and access to an effective labor force. But also just obtaining the cars has become more challenging as well, due to increased competition. Hansen said they do a pretty good job on getting cars overall, but it’s not quite as lucrative as it used to be.

In terms of new venues for the business, they have added shredders to one site each, in Arizona and in Nebraska. Going forward, Hansen indicated that he will keep an eye open for other opportunities to expand the business into other areas.

When asked what advice he might have for anyone looking to get into this industry, he spoke bluntly but with a laugh about the need for having love for it.

“Don’t go into this business unless it gets in your blood and you genuinely like it,” says Hansen. “I like it. A lot of the people that I know that are in this business feel the same way – once you’re in,

you’re in. But it’s not for everyone. Some people make good money doing it, but they’d rather be doing something else. They don’t want to leave because it’s a good living, even if it’s not what they really enjoy. For me, though, it’s just a good business.

The people who excel in the business are those who have a passion for it, stay on top of industry developments and keep pace with changes in regulations and technology.”

“We’ve always tried to stay current with what’s happening in the industry and adopt new things because everything is changing,” Hansen said. “If you don’t like change, you might want to do something else. There’s hardly anything you can guarantee in this world, but one thing I can guarantee is that this business will change.”

Hansen has two sons involved in the industry. His oldest son works with United Auto Recyclers (formerly known as Hansen Truck Salvage Inc.) while his youngest son works with U-Pick-It.

So watch this space to see a profile about the next generation of Hansens in the auto salvage industry.



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EQUIPMENT
SPOTLIGHT

Fluid Removal

by MARY M. THORNTON
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The salvage auto fluid recovery market encompasses a variety of global sectors. As an example, the global transmission fluid recovery market alone is expected to exceed \$19 billion by 2029, according to MarketsandMarkets. Asia Pacific is the largest and fastest growing region and the most notable market changes are due to transmission fluid developments that have improved thermal stability, better friction control and improved oxidation resistance. The following companies provide extraction products for an array of auto fluids, as fluid recovery is a very common component in optimal auto recycling practices.

Crow Environmental offers single bay systems with a scissor lift, or machines that are designed to work between lifts or with racks. Mason Smith, vice president, U.S. sales, explained, “Safety, efficiency and environmental compliance are all important factors when choosing fluid extraction equipment. Our Midi System, designed to work between lifts or racks, can service two lifts or racks. Our split system is great for a side load rack configuration. The process to remove all fluids takes about 13 to 15 minutes. We can also customize a system to meet your needs.”

All Crow systems extract fluids from a vehicle and then pumps directly into large storage tanks. This eliminates double handling the fluids or the need to pump out smaller tanks every day. Each system is designed to optimize work space accessibility for the operator, which increases overall efficiency and safety. According to Smith, regulations regarding fluid

handling are always evolving and staying ahead of these regulations is very important. Crow Environmental offers complete turn-key solutions for extraction equipment, tank farms and even installation if needed. Crow systems employ UL-142 double wall storage tanks along with UL-2085 Fireguard tanks for gasoline.

Iron Ax Manufacturing has manufactured the Enviro Rack ELV Fluid Removal System for more than 20 years, with over 1,000 units placed into service throughout the U.S. “We manufacture a wide range of equipment used in scrap metal recycling and vehicle dismantling operations,” said John Kitchens, president of Iron Ax. “We originally developed the Enviro Rack for use in our own salvage operations. After refining the system and proving its effectiveness, we introduced it to the marketplace.”

Designed specifically for processing end-of-life vehicles, the Enviro Rack allows operators to recover gasoline, antifreeze, engine oil, transmission fluid and other vehicle fluids in one organized work area. The system is completely air-powered, eliminating the need for electrical pumps around potentially flammable liquids.

The Enviro Rack is a fully self-contained system with built-in secondary containment and can be operated by one or two people. Its elevated work platform provides convenient access to the underside of the vehicle while helping keep operators safer, cleaner and more productive. The system includes separate storage for usable and contaminated gasoline, allowing operators to keep pure fuel from being mixed with waste fuel. It



Iron Ax/Recycling Equipment Sales, Inc.

also provides separate storage for different types of antifreeze. All-steel holding tanks, sight gauges and an onboard air manifold are standard features.

“The Enviro Rack is designed to help automotive recyclers establish a consistent and professional fluid-removal process,” Kitchens stated. “Because the system uses air pressure rather than fluid-transfer pumps, there are no electric or diaphragm transfer pumps to continually replace. Depending on the vehicle and the operator’s procedure, many vehicles can be processed in approximately five minutes.”

The Enviro Rack arrives substantially assembled and can typically be placed into operation within approximately 15 minutes after unloading and

connecting the compressed-air supply. Kitchens noted that preventing soil and groundwater contamination remains an important responsibility for salvage-yard owners and operators. “Improper ELV fluid removal can create serious environmental and workplace problems,” Kitchens said. “Many yards still rely on homemade equipment. A homemade system may remove the fluids, but that does not necessarily mean it provides adequate containment or supports a consistent compliance program.”

Environmental requirements and enforcement practices vary by location, but recyclers are responsible for properly managing vehicle fluids and preventing spills and releases. “Yard owners should

See Fluid Removal, Page B5



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Fluid Removal

■ Continued from Page B4

be proactive rather than delaying proper extraction practices until a spill then occurs or an inspector identifies a problem,” Kitchens added. “The Enviro Rack gives recyclers a purpose-built system for safely and efficiently recovering vehicle fluids while supporting their environmental compliance efforts.”

Nigel Dove, chief executive officer of Vortex De-Pollution, noted that “Vortex offers solutions that are not only tough, but remarkably user-friendly as well. Unlike traditional fluid recovery methods that use collection pans under their systems – which can be a fire hazard – our equipment utilizes advanced sealing technologies that tightly adhere to vehicles, significantly minimizing drips and leaks. Fluids are efficiently pumped away from the drain area into secure storage tanks, ensuring controlled and safe fluid transfer at all times. Our product line includes comprehensive vehicle processing equipment. Beyond the fluid recovery range, our cutting-edge, Raptor vehicle processor excels in dismantling vehicles, extracting engines, separating aluminum using our specialized engine cracker and processing components such as catalytic converters, radiators and wire harnesses. We even offer capabilities to bale or log



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SEDA Environmental, has developed and manufactured advanced auto recycling equipment since 1983. Their solutions include drainage systems, ELV and EV recycling tools, separation equipment, and custom-designed technologies that protect the environment. Known for their safety, efficiency and innovation, SEDA sets industry standards in fluid removal and electric vehicle recycling equipment.



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Vortex is a manufacturer of Vehicle De-pollution drain systems and processing equipment for scrap vehicles, such as the Raptor vehicle dismantler, engine crackers and catalytic converter processing. Vortex is also a distributor of metal recycling equipment such as McIntyre Alligator shears and Balers, MG Copper chopping lines, Forrec Shredding systems, Hitachi analyzers, Roter balers and Aymas inclined shears and shear balers. Vortex provides equipment to process vehicles, ferrous and nonferrous scrap metal for the metal recycling industry.

vehicle shells, maximizing the recovery of valuable materials.

“Catering to a diverse clientele, from service auto parts companies to metal recycling facilities, Vortex remains at the forefront in offering a dedicated range of products designed to meet the specific needs of those markets. Our commitment to innovation, efficiency and safety

continues to drive us forward, ensuring that our customers receive nothing less than the best in vehicle processing solutions,” Dove concluded. Since their start in 2003, Vortex has met the rigorous standards of the UK ELV regulations and has continued to innovate and manufacture a robust range of equipment to meet those same high standards.

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Trump Administration imposes 50 percent tariffs on Canadian plastics

The Plastics Industry Association (PLASTICS) chief economist, Dr. Perc Pineda, has released a new economic analysis examining the Trump Administration's decision to impose tariffs on certain Canadian plastics and plastic products.

On July 20, 2026, president Trump issued a proclamation under Section 338 of the Tariff Act of 1930, imposing an additional 50 percent ad valorem duty on a wide range of Canadian products. This includes approximately 20 HTS codes covering plastic materials and plastic products. The action responds to Canada's tariffs on U.S. motor vehicles, which the president determined impose an unreasonable burden on U.S. commerce while favoring imports from other countries.

Section 338 authorizes the president to impose duties of up to 50 percent when a foreign country discriminates against or places an unreasonable burden on U.S. commerce. The new tariffs took effect on August 19, 2026, and are intended to encourage Canada to remove these measures against American vehicles and auto parts.

Scope of the tariff action

While the proclamation identifies products by 8-digit HTS codes in its annexes, the product descriptions serve informational purposes only and do not limit the scope of the Section 338 action. In other words, any listed 6-digit or 8-digit HTS code encompasses all 10-digit HTS codes that fall under it. The complete lists of affected products appear in Annex I and Annex II.

Trade data tells the story

U.S. imports of plastics subject to the new 50 percent tariffs from Canada totaled approximately \$2.99 billion in 2023, \$3.09 billion in 2024, and \$3.10 billion in 2025, based on Customs values.

Industry observers may worry that the cumulative effect of tariffs – the new 50 percent tariffs on Canadian imports, Section 301 tariffs targeting imports from certain countries to address forced labor, and Section 232 tariffs – would increase manufacturing costs. The extent of any price effects, however, will depend on manufacturers' ability to adjust their sourcing strategies, absorb higher input costs, and secure alternative sources of supply. While higher tariffs have cost implications, the United States is a major producer of these plastics, as reflected in its strong export performance.

In 2025, U.S. exports of the same plastics to Canada reached \$4.65 billion on a Free Alongside Ship (FAS) value basis, generating a \$1.55 billion trade surplus. Exports totaled \$4.74 billion in 2024 and \$4.75 billion in 2023. Globally, U.S. exports of these plastics reached \$16.3 billion in 2025 (FAS value). Taken together, these figures indicate substantial domestic production capacity, supplemented by imports from other trading partners.

Enhancing the USMCA for North American Plastics Trade

Despite the U.S.-Mexico-Canada



Agreement (USMCA), the bilateral plastics trade relationship between the United States and Canada has room for improvement. The United States continues to import more plastics from Canada than it exports, highlighting opportunities to strengthen trade under a modernized USMCA. The plastics industries in all three countries have benefited substantially from the agreement's tightly integrated manufacturing supply chains, which depend heavily on plastics for capital goods and intermediate inputs. Maintaining strong market access across these supply chains remains essential.

That said, the agreement is now under review and can be strengthened. Potential enhancements include updating rules of origin to better protect benefits for USMCA partners from non-member countries and expanding coverage to Canadian agriculture, which relies extensively on plastic packaging and related products.

Plastics trade reflects different North American dynamics

Data from the past three years show that trade outcomes with the United States' North American partners under the USMCA framework have differed, reflecting the distinct characteristics of the U.S. plastics industry supply chain. Imports of plastics machinery complement U.S. domestic production by providing manufacturers with access to specialized equipment to maintain competitiveness. U.S. moldmakers have the capacity to support greater domestic production of molds.

The United States has maintained a trade surplus with Mexico in plastics while recording a trade deficit with Canada, reflecting differences in industrial capabilities, production structures, and market demand across the two trading partners.

Key takeaway

The new Section 338 tariffs represent a targeted response to Canada's automotive trade measures. Because the United States maintains strong domestic production and a trade surplus with Canada in the affected plastics categories, the risk of broad supply disruptions appears limited. At the same time, the ongoing USMCA review presents an opportunity to address remaining trade imbalances and reinforce the competitiveness of North America's integrated plastics supply chains.

Hydro to supply high recycled content aluminum to GM

Hydro Aluminum, Shape Corp. and GM are combining local craftsmanship with circular materials for the next era of electric mobility, keeping American scrap in the U.S. value chain, remaking it into high quality aluminum in Michigan, and putting it back on the road in a Cadillac EV.

This collaboration marks one of the first U.S. implementations of Hydro CIRCAL in a structural, safety-critical automotive application.

"Michigan built the automotive age. Now it's building what comes next. This is circularity in action, and we're doing it with materials we already have in the United States. By sourcing recycled aluminum locally and making it in Michigan, GM strengthens U.S. production and supply chain resilience, reduces reliance on foreign materials, and advances practical circularity – ensuring old aluminum is reborn as safety-critical structures for the next generation of vehicles," said Duncan Pitchford, vice president recycling, Hydro Aluminum Metal.

Recycled and made in Michigan

Hydro will supply Hydro CIRCAL from its U.S. recycling facility in Cassopolis, Michigan. Shape Corp. will engineer and assemble the front bumper system to

GM specifications, with integration into the Cadillac OPTIQ platform.

Hydro CIRCAL uses aluminum recovered from end-of-life products such as old vehicles, windows, doors and electrical cables which is then remelted at Hydro's U.S. recycling operations.

Hydro CIRCAL is externally verified by DNV and ensures at least 75 percent post-consumer scrap in each batch, providing traceability in support of OEM sustainability reporting.

The product offers a market-leading carbon footprint of just 1.5 kg CO₂e/kg aluminum, or less, while meeting demanding automotive specifications for strength, energy absorption, corrosion resistance, and formability.

The low carbon footprint means Hydro CIRCAL delivers an estimated 70 percent reduction in CO₂ emissions compared to the North American average for primary aluminum production.

How the component is used

The front bumper beam is a crash-management part located at the front of the vehicle, behind the visible bumper cover. It absorbs and distributes impact energy in collisions to help protect passengers, pedestrians and EV systems, an application where material choice is essential.

ARA issues statement on GM position regarding recycled OEM ADAS components

The Automotive Recyclers Association (ARA) is disappointed in GM's updated collision position statement, Use of Genuine GM Original Equipment Parts, which strictly prohibits the use of recycled original equipment motor vehicle parts. Recycled original equipment parts give vehicle owners access to affordable repair parts at a time when repair costs continue to climb. With the average vehicle on U.S. roads now approaching 13 years old, automotive recyclers are increasingly becoming the only source for OEM parts as a vehicle ages.

ARA's executive director, Vince Edivan noted that, "The ability for vehicle owners to choose recycled parts is becoming more important every year. Without that option, vehicle owners may be unable to afford to keep their car on the road. We believe GM's position creates an important contradiction. If ADAS components can remain in service after a collision when they pass OEM inspection, diagnostic, and calibration procedures, then an undamaged OEM component from another

vehicle should be evaluated under those same standards. If prior collision exposure alone makes an ADAS component unsafe, then all ADAS components should be replaced after every collision repair, regardless of condition or calibration results. If inspection and calibration are sufficient to validate a component already on a collision-damaged vehicle, those same principles should apply to properly inspected and validated recycled OEM components. We support repair decisions based on safety, testing, and objective evidence, not blanket assumptions about the source of a part."

ARA is closely monitoring whether GM's updated position will affect vehicle owners' ability to repair their vehicles with recycled parts. ARA has historically, and successfully, opposed state legislation that would mandate the exclusive use of new OEM parts in vehicle repairs. GM's updated position statement highlights the importance of ARA's advocacy and its role in protecting consumer access to a competitive replacement parts market.

Salvage, Waste and Recycling News 24/7 at www.americanrecycler.com

BMW Group completes \$1.7 billion U.S. investment



Photo courtesy of BMW Group

The BMW Group has completed a \$1.7 billion investment in its South Carolina operations. The company celebrated the milestone at the “Home of X” event at BMW Group Plant Spartanburg, reaffirming its longstanding commitment in the United States through continued investment and innovation leadership. With this milestone, BMW Group has completed the expansion of Plant Spartanburg and the construction of Plant Woodruff, establishing the foundation for the assembly of fully electric BMW vehicles in South Carolina. The United States remains one of BMW Group’s most important markets and business ecosystems worldwide.

“When we announced our investment plans for South Carolina in 2022, we made a clear commitment to the future of the BMW Group in the United States,” said Milan Nedeljković, chairman of the board of management, BMW AG. “The completion of our investments in Plant Spartanburg and Plant Woodruff demonstrates our confidence in the United States and reinforces South Carolina’s role at the center of BMW Group’s global operations.”

Together, Plant Spartanburg and Plant Woodruff form a highly integrated network supporting the future of BMW X

model assembly and electrification in the United States.

South Carolina is the home of BMW Group’s largest plant worldwide. For more than 50 years, BMW has maintained a strong commitment in the United States, growing its presence to nearly 30 locations across 12 states. Today, BMW Group’s business activities in the U.S. support more than 120,000 jobs nationwide and contribute more than \$43.3 billion annually to the U.S. economy.

Established more than three decades ago, BMW Group Plant Spartanburg is the global center of competence for BMW X models. Since 1994, more than 7.3 million BMW vehicles have been assembled in South Carolina for customers in the United States and around the world. In 2025, 412,799 BMW X models were assembled at Plant Spartanburg – this marked the seventh time the plant has exceeded 400,000 units.

Approximately half of the plant’s current production is exported to nearly 120 countries, helping to make BMW the leading automotive exporter in the United States by value. To date, nearly 3 million BMWs have been exported from the United States, valued at over \$113 billion.

Recyclers join together to support vehicle battery labeling

As California’s electric vehicle market continues to grow, the Automotive Recyclers Association (ARA), California Auto Dismantlers & Recyclers Association (CADRA), and the State of California Auto Dismantlers Association (SCADA), have all submitted letters of support for Senate Bill 615 (SB 615). SB 615 seeks to establish a labeling standard for vehicle traction batteries. In ARA’s letter to Senator Ben Allen, Emil Nusbaum, ARA’s vice president of strategy, government, and regulatory affairs, stated that SB 615 is “a productive first step” towards reducing safety risks and economic uncertainty for automotive recyclers working with large-format batteries. SB 615 requires automotive manufacturers to place the following information on vehicle traction batteries: (1) the name of the battery supplier; (2) date of manufacture; (3) chemistry identification that includes cathode and anode type; (4) rated capacity; (5) hazardous substances contained within the battery; (6) product safety and recall information; and (7) safe disposal information. These labeling requirements mirror the labeling requirements included in Colorado’s recently enacted battery lifecycle law that came as the result of inter-industry collaboration over many months.

CADRA, which represents automotive dismantling facilities across Southern California, reaffirmed the need for consistent labeling in its own letter. James Gaye representing CADRA stated that, “managing end-of-life high-voltage batteries safely and sustainably has become a pressing priority for our



industry. CADRA fully supports SB 615 as a key initiative to protect facility workers, strengthen California’s recycling infrastructure, and advance a sustainable circular economy.” James also expressed his appreciation for ARA’s collaborative efforts and said, “CADRA would like to extend our sincere thanks to ARA and Emil Nusbaum for their ongoing support and collaboration. Working with Emil has consistently been a highlight for our organization.”

SCADA also added its voice to the effort as well. In its letter to Senator Allen, Gavin McHugh of McHugh Koepke Padron supported SB 615 and wrote that the bill “will give auto dismantlers better access to the information they need to safely identify and handle batteries without imposing duplicative registration, reporting, recordkeeping, and other regulatory mandates.”

Together, the letters from ARA, CADRA, and SCADA reflect a unified industry voice behind SB 615 as a foundational step toward a safer, more transparent end-of-life vehicle recycling infrastructure in California.



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