

Annual Report 2025



Foreword

Dear Friends,

As I reflect on 2025, I am incredibly proud of the impact our team and partners have achieved this year. What you will read in the pages that follow represents far more than annual progress – it reflects seven years of disciplined learning, iteration and growth. Over that time, we have moved from testing individual interventions to building and strengthening the interconnected components required for true system change. We are not finished – systemic transformation is complex and takes time. But in 2025 we saw clear evidence that the foundations we have been building are taking hold and that our integrated approach can scale across diverse contexts, from Latin America and Indonesia to the launch of our first project in the North America.

Waste is one of the defining system challenges of our time. Rising consumption, urbanization and shifting material streams are increasing both the volume and complexity of waste, while too much value is still lost to landfill, to pollution and to missed economic opportunity. **The question is no longer whether incremental improvements are possible. It is whether we can redesign waste systems so that materials are consistently treated as resources and kept in productive use.**

At Deltterra, that is our focus.

We build integrated waste management and recycling systems that function end-to-end – from household behavior and collection to sorting, processing and strong end markets. Over the past seven years, we have learned that durable change requires aligning incentives across municipalities, waste workers, communities, policymakers and companies. Infrastructure, policy, technology and markets must work together as a coordinated system. In Olavarría, for example, a system co-designed nearly five years ago continues to grow under full municipal ownership. In Bali's Badung Regency, structured handover and enforcement models are embedding new norms that will endure beyond our direct involvement.

While plastics and organics remain urgent priorities given their scale and climate implications, they are addressed within this broader whole-system approach. In Buenos Aires, a redesigned organic collection route rapidly increased collection reducing methane emissions and lowering costs. In Argentina and now Brazil, we are proving that flexible plastics – long considered uneconomic to recycle – can re-enter productive use when supply and demand are aligned. And through Argentina's first women-operated washing plant for low-value plastics, we are showing that inclusive infrastructure can strengthen both markets and livelihoods.

This year's report illustrates how our systems approach translates into action. Across multiple geographies, we are redesigning material flows, strengthening local institutions, advancing behavior change, improving infrastructure, developing digital and data tools, and building end markets that sustain recovery. In 2025, we also expanded this model into North America with the launch of our Demand Accelerator in the United States, aimed at helping unlock new end markets for recycled flexible plastics.

System change is complex, and durable progress requires aligned incentives and local ownership. Our role is to design and catalyze systems that continue delivering environmental and economic value long after our direct involvement. **Thanks to the support of our partners, we are demonstrating that integrated, locally owned waste and recycling systems are not only possible, but scalable.**

I invite you to explore the impact achieved this year and the lessons shaping our next chapter. Together, we are proving that circularity at scale is within reach.

With gratitude,



Dr. Shannon Bouton,
President & CEO, Deltterra

Impact in Review



8.4M

Population of municipalities where we work, #people



40.7k

Waste diverted from landfills and the environment, #tons



11.3k

Plastics recycled, #tons



7.4k

Flexible plastics recycled, #tons



15.4k

GHGs avoided (CO₂e), #tons



1.2k

Livelihoods improved, #people

Table of contents

Foreword 2

Impact in Review 3

How Delterra is Rethinking Material Circularity 5

On The Ground 8

Argentina 9

First women operated low-value plastic washing plant in Argentina 10

Flexible plastics: Unlocking markets for hard-to-recycle materials 10

Olavarria: Lasting impact beyond pilot implementation 11

How Buenos Aires is reducing methane through smarter organic waste management 11

Brazil 12

Guaxupé: A community-led model for circular recycling 13

A cohort approach to scaling change 13

São Paulo: Scaling flexible plastics recycling 14

Indonesia 15

Kekeran Village: When enforcement unlocks behavior change 16

Badung Regency: From pilot to permanent practice 16

Addressing food waste to reduce methane emissions in Papua 17

North America 18

Introducing our Demand Accelerator – unlocking end markets for recycled flexibles 18

Partnering for Change 19

Communicating our Impact 20

How Delterra is Rethinking Material Circularity

The Challenge: Growing Global Waste Pollution

The world's cities are facing overflowing landfills and unmanaged waste, causing public health problems and contaminating the air, land and water. It is estimated, for example, that 16 million tons of plastics end up in the world's oceans each year. On land, waste is often burned, releasing particulate matter and toxic chemicals like mercury, and contributing to the growing number of premature deaths from air pollution each year globally. Organic waste that does make it to landfills is a major source of methane – a greenhouse gas 86 times more potent than carbon dioxide in the near term. Meanwhile waste dumped into canals and rivers is contributing to urban flooding.

The most impoverished urban communities are often the most affected. Over two billion people – 25 percent of the world’s population – live in communities with no collection systems, contributing to diseases including dysentery, malaria, dengue and rodent-borne illnesses. In developing countries, informal recycling is often carried out at great human and environmental cost. Waste pickers endure dangerous and unsanitary working conditions, while informal recyclers operate outside of regulatory oversight and their pollutive by-products are released into the air, water and land.

The urban waste challenge is at a tipping point as public awareness grows. **Companies are making efforts to reduce consumption of single-use plastics.** Many have made commitments to increase the recycled content of their products, **a step that is beginning to generate unprecedented demand for recycled material. However, the system is not prepared to meet this demand.**

The Problem: A broken recycling system

Today only a small proportion of recyclable waste is recovered for productive use. Recycling is stuck in a vicious cycle of unreliable demand and poor supply, preventing sufficient flow of material through the system and stifling investment in potential improvements. Undersized, unstable demand and volatile prices for

recycled materials make recycling an unattractive business. On the supply side, when waste is not illegally dumped and burned, it is often collected as a mix of wet and dry materials. This contaminates both wet organics and dry recyclables, resulting in the loss of what would otherwise be usable material for a circular economy. This issue is exacerbated by the fact that current recycling systems often struggle to cover their costs, partly because of inefficient operations. In addition, **much valuable material is lost due to poorly designed packaging that is too costly or difficult to disaggregate or cannot be recycled in the local system.**

Various solutions have emerged over the years, but none of them fully address this mismatch of supply and demand and design. Programs aimed at addressing a specific part of the value chain (for example, incentivizing people to keep recyclables clean) must still operate within the constraints of this vicious cycle. **Those set up to tackle a specific type of waste (for example, paper or PET) can end up skimming the most valuable materials, rendering the remaining waste stream even less economic to manage.**

More traditional waste collection programs that handle the full waste stream often dispose of it without recycling or composting, missing the opportunity to capture the “gold in the garbage.” **What is needed is a new approach that treats the whole waste stream and spans the entire value chain,** from collection to reuse and redesign, aligning incentives to achieve greater scale. Deltterra aims to meet that challenge.



Delterra's Approach: Reshaping the economics of material circularity

By taking a collaborative and economics-based approach, we believe we can catalyze the recovery of material back into productive use and create scalable, sustainable solutions to tackle the global waste challenge. Delterra's model is built around programs that represent the full value chain of recycled material and which we believe can drive material recovery and reuse in an economically sustainable and scalable way. At the most basic level, our programs address both the supply of and demand for recycled materials:

Supply

We work with cities and communities to build scalable, self-sustaining systems for waste management and recycling, keeping materials in the economy and out of the environment.

Demand

We work with companies across the supply chain to unlock processing capacity and demand while making value chains more efficient, transparent and ethical.

Essential Enablers: Underpinning these efforts

A just and collaborative stakeholder approach. Delterra brings together the right people at the right time:

- **communities** to build inclusive, self-sustaining recycling programs, replicated to cover entire cities, regions and countries;
- **private sector** organizations to ensure stable markets willing to purchase the recovered material at a fair price on an ongoing basis;
- and **government** support at the right moment and at multiple levels to enable and sustain the wide-scale adoption of successful models.

Together, this three-pronged approach engages all stakeholders to ensure we will be able to scale what works. We do this by ensuring an increased supply of high-quality recyclable materials and matching that with the reliable demand and prices required to stabilize the system.



On The Ground

Argentina >
Brazil >
Indonesia >
North America >

Delterra is advancing circular material systems solutions across Latin America, Indonesia and North America – improving recycling, unlocking materials markets and reducing organic waste. Building on the foundations established in previous years, our 2025 work deepens this system-level approach, strengthening the links between communities, markets and policy to drive lasting change. Our efforts blend community-led initiatives with market-based strategies, policy support and practical pilots designed to scale. Read on for more details on how our work creates enduring environmental, social and economic impact.

Argentina

Key Challenges and Our Approach

Argentina's waste management issues are widespread across the country. With an **average waste generation of 1.15 kg per capita daily – amounting to 49,300 tons daily and 18 million tons annually** – nearly 5,000 open-air dumpsites remain the primary disposal method in many municipalities. Despite improvements, waste management remains a major environmental and public health concern. The country faces critical challenges, exacerbated by a 92 percent urbanization rate. Though waste collection reaches 99.8 percent of the population, 54 percent is outsourced, and municipalities often lack the resources for proper waste treatment.

While urban areas have sorting plants and a growing recycling industry, waste pickers still collect most recyclables. Lack of technical and financial resources, weak regulatory coordination and insufficient trained personnel complicate waste management efforts. Additionally, data is often fragmented, with municipalities lacking unified systems to track and manage waste effectively.

Delterra's work in Argentina builds on several years of collaboration with cities, cooperatives and private sector partners to strengthen the country's recycling ecosystem. Beginning with an informal settlement, Barrio 31, in the heart of Buenos Aires in 2019, and expanding to a citywide transformation in Olavarría in 2021, Delterra helped demonstrate how optimizing collection systems, improving sorting operations and building behavior change among residents could significantly increase material recovery.

Lessons from this work informed a broader strategy to support multiple cities across the country, combining municipal partnerships with efforts to unlock new markets for hard-to-recycle materials and improve transparency across recycling value chains.

Through initiatives such as material traceability, flexible plastics market development and capacity building for waste workers and cooperatives, **Delterra has been laying the foundation for a more resilient and inclusive circular materials system in Argentina.**



First women operated low-value plastic washing plant in Argentina

With the support of **Beiersdorf**, and in collaboration with **Cooperativa Baires** and the **Buenos Aires City Government**, Deltterra helped launch Argentina's first washing plant dedicated to low-value plastics and operated primarily by women.

Officially inaugurated in May 2025, the facility is part of **Beiersdorf's Women in Circularity Program** and addresses one of the most challenging gaps in the recycling system: the lack of processing capacity for contaminated, low-value plastic materials.

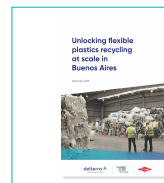
The plant creates safer, more stable employment while enabling plastics that were previously landfilled or burned to re-enter the economy. Twelve women now lead daily operations, managing washing and preparation processes that improve material quality and unlock access to recycling markets. Their work is strengthening the local recycling value chain while expanding economic opportunity for women in vulnerable communities.

This project shows how circular material systems solutions can deliver environmental impact and social empowerment at the same time. By combining inclusive infrastructure with market-driven design, the washing plant offers a powerful model for how recycling systems can work better for people and the planet.



[Watch the video to see the women leading this work in action.](#)

Flexible plastics: Unlocking markets for hard-to-recycle materials



[Download the full report, *Unlocking Flexible Plastics Recycling*, to explore the findings and lessons learned.](#)

Flexible plastics make up a large share of household waste in Greater Buenos Aires, yet historically, less than three percent has been recycled. To address this gap, Deltterra led a two-year initiative to test whether flexible plastics recycling could become technically feasible and economically viable without relying on regulatory mandates.

The work was carried out in partnership with **Dow** and the **Alliance to End Plastic Waste**, bringing together cooperatives, recyclers and end-market buyers across the value chain.

The initiative focused on strengthening both supply and demand. **More than 500 waste workers were trained, and sorting centers doubled the volume of flexible plastics recovered** through improved operations and short-term incentives that tapered over time. At the same time, recyclers improved how they cleaned and processed the plastics, blended materials for improved prices and made sure the final products met higher quality standards.

With these improvements and access to new buyers, production increased eightfold, reaching up to 400–450 tons per month.

By achieving economies of scale, **recyclers were able to reduce unit costs and remain profitable after the project ended** – a rare outcome for post-consumer flexible plastics recycling in the absence of Extended Producer Responsibility (EPR) or recycled-content requirements.

These results demonstrate that, with the right incentives and market alignment, flexible plastics can be recovered at scale and reintroduced into productive use. The learnings from Buenos Aires are now informing Deltterra's next phase of work in Brazil and the US.

Olavarría: Lasting impact beyond pilot implementation



Nearly five years ago, Deltterra partnered with the **City of Olavarría** to help redesign its municipal waste system to be more circular, cost effective and locally owned. Our work focused on strengthening existing collection and processing systems, building capacity within municipal teams and co-creating a model that could continue long after Deltterra stepped back in 2023.

That continuity is now delivering tangible results. In 2025 alone, the city recovered nearly 220 tons of recyclable material through the GIRO (Gestión Integral de Residuos de Olavarría – Integrated Waste Management of Olavarría) program, a 60 percent increase compared to 2024. Separate collection led by a local cooperative has improved material quality, strengthened working conditions and enabled the sorting plant to recover roughly half of the material it receives. Expanded door-to-door outreach and neighborhood engagement have reached tens of thousands of households, reinforcing source separation as a daily habit across the city.

Today, **GIRO stands as proof that when waste systems are co-designed with local government, cooperatives and communities, impact can grow even after external partners exit.** Olavarría's progress highlights what is possible when ownership is fully embedded locally and when cities are equipped to adapt, expand and improve their systems over time.

[Learn more about the full Olavarría experience and key lessons here.](#)

How Buenos Aires is reducing methane through smarter organic waste management

Amid growing pressure on cities to reduce greenhouse gas emissions, Buenos Aires is demonstrating that acting smarter – not bigger – can deliver rapid progress on organic waste management and methane reduction. In a project co-funded by the **Climate and Clean Air Coalition (CCAC)** and the **Global Methane Hub (GMH)**, Deltterra partnered with the City of Buenos Aires to show how optimizing existing systems can unlock significant climate and cost benefits. With less than three percent of organic waste currently source separated and most material sent to the CEAMSE Norte III landfill – one of the largest in Latin America – the need for a more effective approach was clear.

Rather than building new infrastructure, the city redesigned a single organic waste collection route serving large food businesses and paired it with a targeted behavior change campaign and digital tracking tools. Within months, the pilot delivered measurable results. **Organic waste recovery increased by 45 percent, collection costs per ton dropped by 25 percent and sorting quality improved from 68 percent to nearly 100 percent in just 12 weeks.** These outcomes show how better alignment between operations, incentives and accountability can rapidly improve system performance.

Building on this success, Buenos Aires plans to scale the model to 10 routes by 2027, with the potential to recover more than 6,000 tons of organic waste per year. If expanded through a hotspot strategy, **the approach could help prevent an estimated 1.7 million tons of CO₂e emissions by 2050¹**, equivalent to removing approximately 370,000 cars from the road for one year. The result is a citywide model that is both economically sound and environmentally powerful, offering a practical blueprint for other cities seeking climate impact without overextending public budgets.

[Download the case study here.](#)

¹ Emissions avoided calculated using 2.58 CO₂e per ton of organic waste, based on IPCC default values.

Brazil

Key Challenges and Our Approach

Brazil's vast ecosystems, from the Amazon Rainforest to coastal habitats, face increasing pressure due to pollution and expanding economic activities. Rapid urbanization has significantly increased waste generation, challenging existing waste management systems. Many municipalities lack resources, adequate services and public awareness around recycling.

Brazil's **National Solid Waste Policy** (PNRS) promotes waste reduction, recycling and sustainable practices. A national extended producer responsibility legislation attempts to ensure manufacturers manage their products' entire lifecycle. In 2022, Brazil had nearly 2,000 recycling centers and 76 composting sites, but 20 million people still lacked regular waste collection. Brazil's **National Solid Waste Plan** (PLANARES - Plano Nacional de Resíduos Sólidos) aims to boost waste recovery to 48.1 percent by 2040, but landfills remain the dominant disposal method, hindering the shift to a circular materials system.

Delterra began working in Brazil in recent years to adapt and scale the approaches developed in Argentina and Indonesia to the country's unique policy and municipal landscape. Early efforts focused on understanding how Brazil's strong regulatory framework and active recycling ecosystem could support system-level transformation.

In partnership with local organizations such as **Recicleiros**, Delterra piloted behavior change strategies to increase household source separation while identifying opportunities to strengthen recycling infrastructure and market demand for recovered materials. These initial collaborations provided valuable insights into community motivations, cooperative-led operations and municipal capacity.

Building on these lessons, Delterra is now expanding its work to support multiple cities, develop stronger markets for hard-to-recycle plastics and test scalable models that align local participation, municipal systems and private-sector demand.



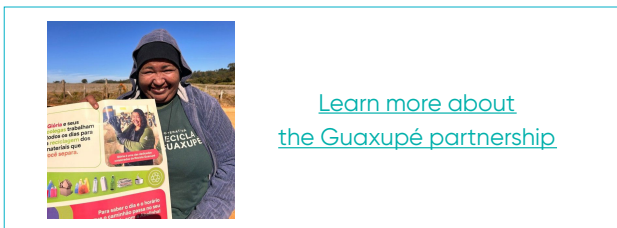
Guaxupé: A community-led model for circular recycling

In the city of Guaxupé, Deltterra partnered with **Recicleiros** to strengthen recycling participation and recovery through a deeply local, community-centered approach. Supported by the **Alliance to End Plastic Waste**, this public-private partnership demonstrates how cities can build durable waste management systems rooted in local culture, trust and collaboration.

The project began with in-depth research to understand why households did or did not recycle. Insights showed that residents were most motivated when recycling was framed as a shared civic responsibility that also supported local workers. These findings shaped the launch of **Separa + (Separate +)**, a citywide behavior change program developed with the municipality and the **Recicla Guaxupé** cooperative. Engagement combined door-to-door outreach, digital tools and mass communication, all tailored to local norms.

The pilot phase, conducted in one of the municipality's ten collection sectors, delivered remarkable outcomes, underscoring the efficacy of the collaboration between Deltterra and Recicleiros. During an eight-week monitoring period within the designated micro-territory, the following results were observed:

- The participation rate in this area (measured by the quantity of materials collected relative to the potential waste generation) peaked at a level **3.5 times higher** than the pre-activation period.
- A **33 percent increase** was observed in the number of households separating recyclable materials for collection at designated disposal points.



[Learn more about the Guaxupé partnership](#)

A cohort approach to scaling change



Building on lessons from Argentina, and the success of our 2024 call for cities, Deltterra formalized a cohort-based model to support Brazilian municipalities ready to accelerate waste system transformation. The call for participation, launched at the ICLEI World Conference in São Paulo and co-funded by **the Climate and Clean Air Coalition (CCAC)**, generated 31 applications from across all five regions of Brazil. Following virtual assessments and eight site visits, three cities were selected as inaugural partners: **Arapiraca, Contagem and Florianópolis**.

In 2025, this work moved from selection to implementation. Each city represents a distinct regional context, infrastructure profile and stage of system development, yet all share a strong opportunity to improve plastics and organic waste recovery and reduce methane emissions. Together, they form a living laboratory for testing practical pathways to system change in diverse urban realities.

In November 2025, Deltterra returned to all three cities to conduct in-depth interviews with residents and system users. These conversations provided critical insight into participation barriers, motivations and local dynamics shaping source separation. Drawing on this qualitative research, we are developing detailed user profiles that will inform targeted behavior change campaigns tailored to each city's context. By grounding communications strategies in lived experience, we are increasing the likelihood of sustained citizen engagement and cleaner material streams.

Through this cohort model, Deltterra is not only supporting three cities, but also refining replicable approaches that can scale more rapidly and effectively across Brazil.

Our Impact in Brazil

São Paulo: Scaling flexible plastics recycling

Flexible plastics **account for roughly one third of Brazil's plastic waste, yet only about four percent is recycled.**

After completing market assessments and identifying priority locations for scale in 2024, Delterra moved into implementation in 2025, supported in part by funding from **Mars**.

In São Paulo, Delterra is building on its flexible plastics work in Argentina to prove that materials normally sent to landfill can be recycled at scale. We conducted a successful proof of concept to test whether post-consumer flexible plastics could be sorted to a higher quality and absorbed by domestic end markets.

Delterra partnered with **Coopercaps**, a cooperative operating inside the city's mechanized sorting centers, to re-sort approximately seven tons of flexible plastic waste into three distinct streams: transparent, black and mixed colors. Previously, these materials were sold together as a single low-value fraction.

The re-sorted materials were then processed by **Grupo Interação**, a recycler based in Araras.

Grupo Interação confirmed that the quality of the material met their technical requirements for producing plastic bags and was higher than the flexible plastics they currently source from local cooperatives. **This validation demonstrates that targeted sorting interventions within existing infrastructure can significantly improve material value and market readiness.**

In parallel, this work **reached an important milestone with approval under a Brazilian national tax incentive initiative designed to strengthen the recycling value chain.** This approval enables Delterra to mobilize additional fundraising for the project and scale implementation.

By combining hands-on operational pilots, cooperative engagement and supportive policy mechanisms, São Paulo is becoming a critical test case for making flexible plastics recycling economically viable at scale across Brazil.



Indonesia

Key Challenges and Our Approach

Indonesia is grappling with a growing waste crisis, as municipal waste generation rises by nine percent annually. In 2024, waste data from 279 cities showed that national waste deposits have reached **29.4 million tons per year, with 38.4 percent (11.3 million tons) left unmanaged**. The country's fragmented waste management infrastructure, where villages are responsible for their own waste, as well as chronic under investment in waste infrastructure, leads to inefficiencies and significant environmental impact.

Indonesia's vast archipelago, with more than 17,000 islands and 81,000 kilometers of coastline, faces severe plastic and organic waste accumulation, impacting food systems and public health. The country's booming fishing industry, the second largest globally, is threatened by rising marine plastic debris. Delterra is working to empower communities in Bali to manage their waste sustainably and to develop sustainable circular material systems solutions.

Delterra's work in Indonesia has evolved over several years from village-level pilots to broader system transformation across Bali. Early programs focused on helping communities improve the performance of local TPS3R waste facilities by strengthening operations, building waste worker capacity and encouraging households to separate waste at the source. These efforts demonstrated that community-led systems could achieve high participation rates and become financially viable when paired with behavior change campaigns, reliable collection and stronger local governance.

Building on these lessons, Delterra began working with the Badung Regency government to redesign waste management across multiple villages, integrating local collection with centralized organic waste processing and standardized operational practices. This **progression from pilot projects to regency-level collaboration laid the groundwork for the initiatives highlighted** in the next few pages.



Kekeran Village: When enforcement unlocks behavior change

In Kekeran Village, Deltterra supported a bold intervention that demonstrated how quickly waste sorting behaviors can change when clear rules are paired with reliable services. Through a **"No Sorting, No Collection"** approach combined with behavior change education, household participation in waste separation **increased from just six percent to 78 percent in two weeks**, while contamination at the processing facility dropped from nearly 100 percent to 26 percent.

The success was underpinned by strong government ownership and empowered village leadership. The Badung Regency environmental agency aligned collection schedules, staff and facilities to support enforcement, while village leaders mobilized residents, coordinated local teams and reinforced shared accountability. This combination transformed waste sorting from a voluntary action into a collective community norm.

Kekeran's experience shows that enforcement works when it is fair, consistent and supported by trusted systems. As landfill pressure grows across Bali, this model offers a scalable pathway for other communities seeking rapid, lasting improvement in waste management.

[Read the full story of Kekeran Village's transformation](#)

Badung Regency: From pilot to permanent practice

In 2025, Deltterra successfully completed and handed over its Rethinking Recycling program across five villages in the Badung Regency of Bali. Working in close partnership with the regency government, the program focused on strengthening collection systems, improving material separation and integrating organic waste processing into a centralized facility serving multiple communities.

A key milestone was the **integration of organic waste from village collection routes and private collectors into the Mengwitani processing facility**, with the support of the **Global Methane Hub (GMH)**. In parallel, Deltterra completed structured knowledge transfer sessions with local government teams, including operational training and guidance on the "No Sorting, No Collection" enforcement scheme. These sessions were designed to build confidence and capability within the regency, ensuring systems could be managed and enforced independently over the long term.

As the program transitions fully to local leadership, ownership now rests with the regency and village governments, supported by trained teams and standardized operations. **The result is a durable foundation for expanding waste system improvements across Bali and other regions facing similar challenges.**



Addressing food waste to reduce methane emissions in Papua

In Papua, Deltterra partnered with **WWF** to support cities in identifying practical and scalable strategies to reduce methane emissions by tackling food waste at the source. Working in **Jayapura** and **Merauke** between May and December 2025, the collaboration focused on building local evidence, strengthening capacity and testing behavior change approaches in contexts where waste management systems remain limited and organic waste is largely unmanaged.

Together with WWF and local partners and with the support of Global Methane Hub, Deltterra conducted **detailed waste baselining** across households and non-households (restaurants, hotels and traditional markets) to understand how food waste is generated, handled and disposed of. This work informed the design of **targeted behavior change pilots for households, hotels and restaurants**, addressing everyday drivers of food waste such as portioning, meal planning, storage and seasonal surplus.

Local educators and community representatives were **trained through a train-the-trainer model to deliver campaigns and sustain engagement beyond the pilot period.**

The work also surfaced the **broader system conditions required for lasting impact.** While behavior change showed early promise, the findings reinforced that reductions in food waste and methane emissions depend on reliable collection services, accessible organic waste processing options, supportive policy frameworks and long-term financing. Insights from Papua can help **inform national discussions** on food loss and waste and help shape pathways for scale across Indonesia.

A full report on this work will be released soon!

[Sign up for our newsletter to receive it directly in your inbox.](#)



North America

Context

North America contains two of the world's top per-capita producers of municipal solid waste, with U.S. waste generation alone **exceeding 290 million tons annually** – almost 12 percent of global waste. Despite decades of curbside collection programs, **recycling and composting rates in the U.S. and Canada continue to hover around 25 to 35 percent**, leaving hundreds of millions of tons sent for disposal in landfills or incinerators.

Significant quantities of recyclable materials are landfilled each year due to contamination, limited processing capacity and weak end-market demand. Policy responses are emerging but remain uneven, with a handful of U.S. states and nearly all Canadian provinces having adopted Extended Producer Responsibility (EPR) laws that shift financial responsibility for packaging waste from consumers to producers. Notably, **California's SB54 requires 65 percent of single-use packaging to be recycled by 2032** and mandates a 25 percent reduction in plastic packaging produced overall.

However, despite these laws, the path to meet these ambitious targets is still uncertain, with some applications (particularly plastic films and flexibles) having limited proven end-market applications.

Introducing our Demand Accelerator – unlocking end markets for recycled flexibles

In North America, Deltterra launched the Demand Accelerator to address one of the biggest barriers to recycling films and flexibles: the lack of proven, stable end markets. Together with **Kraft Heinz** and **Amcor** and with the support of **Eunomia Research & Consulting**, the initiative focuses on unlocking new applications for recycled flexible plastics in the U.S., helping close the gap between recovered material and reliable demand.

The Demand Accelerator uses a fact-based, real-world approach to **test new end-market applications for recycled films and flexibles** (e.g., building and construction films, heavy-duty sacks) and quantify the financial conditions needed for scale. By validating what works in practice, the initiative aims to strengthen demand signals, reduce risk for recyclers and support higher recycling rates across the system.

Join us.

Deltterra is seeking additional funders and implementation partners to expand pilots and accelerate validation of new end-market applications. To explore partnership roles available in 2026, reach out to jeremy@deltterra.org.

Partnering for change

Delterra's work is powered by a diverse network of partners across the public, private and nonprofit sectors who share a commitment to building more circular and inclusive waste systems.

This year, we deepened collaboration with long-standing partners while also welcoming new organizations into our ecosystem – expanding our reach, strengthening local implementation and accelerating progress across regions. Together, these partnerships make it possible to move from pilots to scalable solutions and deliver lasting impact on the ground. We are grateful to the many partners and funders who make this work possible and want to extend a special thank you to our strategic partners below whose sustained commitment has been foundational to our growth.

STRATEGIC PARTNERS



MARS

P&G

4

Communicating our impact

New reports

In 2025, we published two new reports built from hands-on pilots, translating what works on the ground into clear guidance for cities, recyclers and policymakers ready to scale impact. Download the reports below.

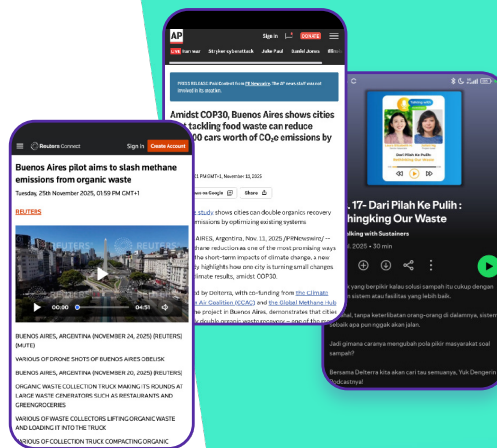
- [Unlocking Flexible Plastics Recycling](#)
- [A Model for Cities: How Buenos Aires Is Reducing Methane Through Organic Waste Management](#)



In the news

Delterra's work continued to reach regional and global media, amplifying conversations around circularity, climate action and inclusive waste systems. A few examples of our featured work can be found below.

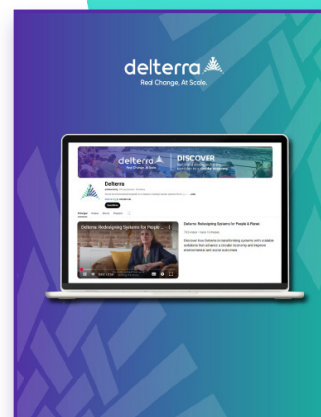
- [Reuters](#)
- [AP News](#)
- [Sustainers Podcast by Avirama Foundation Indonesia](#)



We're on YouTube!

Last year, we launched Delterra's YouTube channel to share the energy, people and progress behind our work, from on-the-ground pilots to big ideas shaping the future of circularity. Since then, we have grown the channel into a hub for field stories, partner voices and insights from our research and pilots, alongside webinars spotlighting innovative approaches to organic waste management and methane reduction across Latin America.

- [Visit our YouTube channel](#)



Introducing our Indonesia Instagram

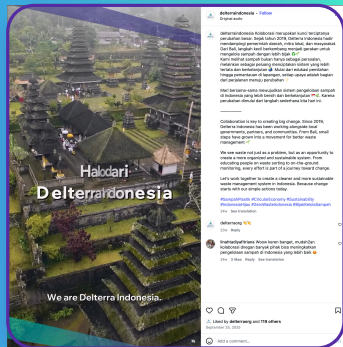
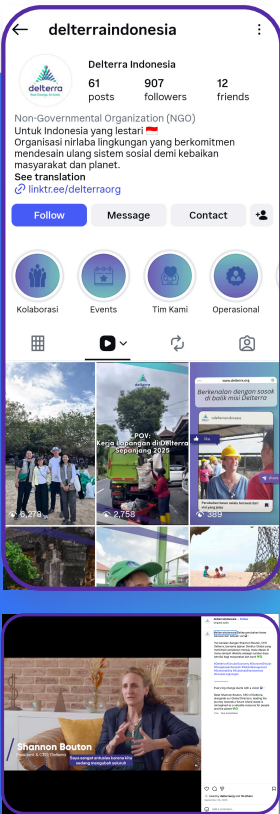
We created a dedicated Instagram presence for Indonesia to spotlight local voices, community action and on-the-ground progress across our work the country. The channel offers a closer look at how waste systems are evolving across Bali and beyond.

[Follow along here](#)

Brazil: Local Action, Localized Materials

Did you know: We have a team on the ground in Brazil?

As part of our work in the region, several of our reports and research papers are translated to Portuguese. Please reach out to mariana@delterra.org for more information.



Conferences and events

We continued to participate in major global and regional conferences in 2025, contributing to discussions on circularity, climate action and sustainable development. These engagements helped share lessons from our work and strengthen collaboration across sectors.

Just a few of those events:

- Hosting an informal policy roundtable with the Ellen MacArthur Foundation
- Delterra seminar with Indonesia's Deputy Minister of Home Affairs
- Presenting at ISWA World Congress 2025 in Argentina
- Co-hosting a flexible plastics recycling webinar with Dow and the Alliance to End Plastic Waste
- Attendance at major conferences such as COP30, Global Plastic Treaty, Indonesia International Sustainability Forum and New York Climate Week



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