
Missouri Market Development Program

Annual Report for Fiscal Year 2025

(July 1, 2024 – June 30, 2025)



**Missouri Market
Development Program**



Missouri Market Development Program

Developing Markets Through Cooperation

Introduction

Administration

In 1990, the Missouri General Assembly directed the Environmental Improvement and Energy Resources Authority (EI ERA) to establish the Missouri Market Development Program to promote the development and maintenance of markets for recovered materials. EI ERA is a quasi-governmental agency with a Governor appointed bi-partisan board that serves as the financing arm of the Department of Natural Resources. EI ERA was selected to house the Missouri Market Development Program to bridge economic development and environmental interests.

Purpose

The Missouri Market Development Program promotes the development and maintenance of markets for recovered materials and recycled content products throughout Missouri by providing financial incentives, technical assistance and informational services to businesses, governments and other organizations.

Recycling market development helps to ensure that recycling will expand its role in a sustainable Missouri economy. Growth in the recycling market creates jobs, conserves resources, contributes to a quality environment, and reduces reliance on Missouri's landfills for disposal of solid waste.

Funding

To implement this statewide effort, the Missouri Market Development Program was allocated \$800,000 from Missouri's Solid Waste Management Fund in Fiscal Year 2025.

Program Impact

Recycling market development is working! In Fiscal Year 2025, the Missouri Market Development Program's new investment in five Missouri recycling businesses and continued management of nine previously funded active projects provided the following benefits to our economy and the environment:

- Leveraged over \$12.9 million in private investment
- Created an estimated 85 new Missouri jobs
- Diverted an estimated 149,000+ tons from Missouri landfills annually
- Avoided nearly \$6.4 million in estimated disposal costs for the materials used in these projects each year



Missouri Market Development Program

Developing Markets Through Cooperation

Partners

The cooperation and assistance of several agencies and organizations have been instrumental in the success of the Missouri Market Development Program.

Department of Economic Development

During the fiscal year, the Missouri Market Development Program continued its working relationship with the Department of Economic Development (DED) in support of program objectives. The Missouri Market Development Program and DED coordinate direct assistance to businesses to improve sales and purchases of Missouri products made from recyclable materials.

Department of Natural Resources

The Missouri Market Development Program works closely with the Department of Natural Resources (DNR) in its administration of funds from the Solid Waste Management Fund and toward advancing the Waste Management Program's waste reduction and recycling efforts. The Missouri Market Development Program coordinates priorities and evaluation of activities with the Waste Management Program.

Office of Administration

The Missouri Market Development Program, in cooperation with the Office of Administration (OA), promotes recycling in state agencies. The Missouri Market Development Program works with OA on the Missouri Interagency Recycling Council and in developing the annual State of Missouri Recycling and Waste Reduction Report.

Solid Waste Advisory Board

The Missouri Market Development Program provides updates on its activities to the Solid Waste Advisory Board (SWAB). The SWAB Board is made up of the chairperson of each of the 20 Solid Waste Management Districts, three citizen representatives and two representatives of the solid waste management industry. The Solid Waste Advisory Board chair also serves on the Missouri Market Development Program Steering Committee.

Missouri Market Development Program Steering Committee

Staff from the EIERA, DED and DNR's Waste Management Program and the SWAB chair comprise the Market Development Program Steering Committee. The committee evaluates financial assistance applications and technical assistance proposals submitted to the Missouri Market Development Program and makes funding recommendations to the EIERA board.



Missouri Market Development Program

Business Assistance

Partners(continued)

Missouri Recycling Association

Missouri Market Development Program staff are actively involved in the activities of the Missouri Recycling Association, Missouri's only collective voice for recycling, waste reduction and sustainability issues.

Missouri Waste Control Coalition

The Missouri Market Development Program supports the efforts of the Missouri Waste Control Coalition by participating and supporting their annual conference. Staff also serve on the coalition's advisory board.

Missouri Product Stewardship Council

Missouri Market Development Program staff participate in the Executive Committee for the Missouri Product Stewardship Council, a coalition of local governments, businesses and other stakeholders that aim to reduce waste, increase re-use and recycling, save local governments money, and support jobs. The Council takes a product stewardship approach, which seeks to share responsibility with product manufacturers and creates accountability for managing waste, particularly at the post-consumer state. The Product Stewardship Institute (PSI) helped establish the Mo. Product Stewardship Council and serves as its coordinator.



Missouri Market Development Program

Business Assistance

FY2025 Update

Market Development Program Supports Missouri Businesses

The Missouri Market Development Program supports both large and small-scale projects. Thanks to the program, wood waste is being managed with a more efficient, economic process by Federal International Recycling and Waste Solutions, LLC in Jefferson City, Hansen's Tree Service's operation in Brookline, and Lumber Logs, in St. Louis. The program is also assisting J Carter Enterprises in New Bloomfield with plastic waste from a nearby global manufacturer with plans to expand processing capacity to assist other mid-Missouri manufacturers. The program is also assisting Monarch Waste Company, LLC in St. Louis as they pave the way in offering compliant waste management services for licensed cannabis facilities throughout Missouri and is currently the state's only company focused exclusively on cannabis waste.

Fiscal Year 2025 Financial Assistance

The Missouri Market Development Program's financial assistance is targeted toward developing and expanding manufacturing capacity in Missouri by assisting businesses with the purchase of equipment needed to enable manufacturing facilities to use recovered materials. Applicants to the Missouri Market Development Program may seek financial assistance to purchase specific equipment needed to manufacture a product from recovered materials or to process recovered materials so that they can be used as manufacturing feedstock.

Applications are assigned points in the categories of job creation, annual diversion, and the cash match provided by the applicant. If the application addresses a priority waste stream targeted by the program, additional points are added to the total. Targeted waste streams include construction and demolition waste, food waste and organics, and plastics. If the project location is within a minimally funded Missouri Solid Waste Management District, it will also earn additional points. (A list of these districts is available at [MMDP Solid Waste Management Districts.pdf](#).)

Any award requires a cash match of at least 25 percent of the cost of the equipment, and a 100 percent cash match is required to receive the maximum award.

Additional Activities

In addition to the financial assistance offered to Missouri businesses, the Missouri Market Development Program continues to assist them with locating and procuring recyclable feedstocks and end markets for their recycled-content products.



Missouri Market Development Program

FY2025 Projects

Federal International Recycling & Waste Solutions, LLC

Federal International in Jefferson City was awarded \$250,000 in financial assistance to purchase a wood/pallet grinder costing approximately \$593,000. After assessing the viability of an improved and expanded pallet recovery process to address wood scrap that is beyond its useful life, Federal International decided to expand their current processing with the addition of a wood grinder. Damaged and unsalvageable pallets and other wooden containers are shredded into wood biomass fuel for a waste-to-energy facility in Columbia. Federal International anticipates working with area manufacturers to capture and increase the amount of pallets they are able to accept and process with the new grinder.

Federal International reported this expansion would create 13 full time positions and divert approximately 3,276-4,200 tons from the waste stream annually.

J Carter Enterprises

J Carter Enterprises, located in New Bloomfield, was awarded \$85,500 in financial assistance to purchase a plastic grinder (granulator) costing \$143,600. J Carter Enterprises currently works with numerous manufacturers and companies in the area, collecting and remanufacturing pallets. J Carter Enterprises researched diversion alternatives for large plastic spools that are currently a significant part of a local manufacturing plant's waste stream. The granulator grinds the plastic spools into 3/8" flakes or chips that can be marketed for various applications but the bulk of the regrind material is currently becoming feedstock for the manufacture of PVC pipe.

J Carter Enterprises anticipates the project would initially create 1 full time position and 1 part time position and divert a minimum of 84 tons of plastic material from the waste stream annually. The company anticipates the job creation and diversion numbers to increase as he refines his process and is able to accept additional plastic waste.

Hansen's Tree Service of Branson, LLC

Hansen's Tree Service was awarded \$220,000 in financial assistance for a mulch colorizing machine at its facility in Brookline. Hansen's Tree Service of Branson is currently the largest mulch and compost producer in Southwest Missouri, operating two green waste recycling centers with three retail locations. Currently Hansen's Tree Service of Branson employs 42 people and operates a fleet of 35 trucks. This company provides services as far west as Joplin, north to Columbia, east to West Plains, and south to the Arkansas border. The colorizing machine will add value to their mulch products and allow them to expand their processing capabilities, increasing the demand for their established products.

Hansen's Tree Service of Branson, LLC currently diverts 23,888 tons of organic waste materials and expects this project will divert an additional 817 tons annually from the waste stream. They anticipate adding 2 full time positions.



Missouri Market Development Program

Monarch Waste Co., LLC

Monarch Waste Co., LLC located in St. Louis was awarded \$55,000 in financial assistance for a portable shredder and generator.. Monarch Waste Co., LLC specializes in compliant waste management for licensed cannabis facilities and is currently the state's only company focused exclusively on cannabis waste.

Monarch Waste Co., LLC provides mobile, on-site disposal using an industrial shredder, ensuring the cannabis waste is rendered unusable in accordance with the Missouri the Department of Health and Senior Services' Division of Cannabis Regulation's standards.. The cannabis waste is ground with at least 50% non-cannabis material and then transported as "rendered waste" to a composting facility, where it is converted into nutrient-rich compost for agricultural and horticultural use.

The additional equipment allowed the company to deploy a second truck, resulting in the addition of 2 full-time positions and diverting an additional 90 tons of cannabis waste per year from the landfill.

Lumber Logs, LLC

Lumber Logs, LLC, located in St. Louis was awarded \$75,000 in financial assistance for a loading crane and grapple, along with log bunks for their new truck. Lumber Logs, LLC has been collecting and recycling logs locally since 2004. Lumber Logs, LLC offers free collection service to those clearing land or removing trees within Saint Louis City, Saint Louis County and to a portion of St. Charles and Jefferson Counties. Over 95% of the logs collected are processed and sold to local mills. The remainder of the logs are sawed into hardwood lumber that is sold to local woodworkers. Lumber Logs is able to recycle a large volume of lower grade logs, which sets them apart from other companies in the area. This service offers a higher value use of these logs than burning or mulching..

Lumber Logs, LLC has diverted over 23,000 tons of logs, with yearly totals ranging from 721 tons to 1,793 tons. The addition of a reliable truck and full-time driver w allow them to divert an additional 1,200 -1,800+ tons annually.



Missouri Market Development Program

Business Assistance

Summary of FY2025 New Projects

Company	City	Material	Est.Tons Diverted Annually	Est.New Jobs	Award	Total Project Cost	Annual Savings*
Federal International Recycling	Jefferson City	Pallet & Wood Waste	4,200	13	\$250,000	\$593,321	\$378,000
J Carter Enterprises	New Bloomfield	Plastics	84	2	\$85,500	\$143,600	\$7,560
Hansen's Tree Service	Brookline	Wood	23,888	2	\$220,000	\$498,505	\$859,968
Monarch Waste Co., LLC	St. Louis	Cannabis Waste	90	2	\$55,000	\$118,532	\$16,919
Lumber Logs, LLC	St. Louis	Wood	1,200	1	\$75,000	\$263,303	\$40,800
TOTALS			29,462	20	\$685,500	\$1,617,261	\$1,303,247

* Avoided Disposal Costs

Program Impact: FY 2025 New Projects

The Missouri Market Development Program's fiscal year 2025 new investment in these five Missouri recycling businesses helped our economy and environment by:

- Leveraged over \$1.6 million in total investment
- Created an estimated 20 Missouri jobs
- Diverted an estimated 29,000+ tons from Missouri landfills annually
- Avoided more than \$1.3 million in estimated disposal costs for the materials used in these projects each year



Missouri Market Development Program

Business Assistance

Summary of FY2025 Active Projects (previously awarded–still open)

In addition to the five new projects awarded in fiscal year 2025, nine previously awarded projects were actively managed by the program during the fiscal year.

Company	City	Material	Est. Tons Diverted Annually	Est. New Jobs	Award	Total Project Cost	Annual Savings*
EcoTire Treading Co.	Springfield	Tires	30,000	4	\$250,000	\$1,600,000	\$1,290,000
Holliday Construction	Boonville	Organics	4,380	4	\$230,500	\$461,160	\$258,420
Korte Enterprises, LLC	Jefferson City	Wood	2,600	3	\$250,000	\$500,000	\$221,000
Northwest Mo. Univ.	Maryville	Paper	44	0	\$40,095	\$53,461	\$2,117
Printerior, LLC	St. Louis	Plastics	30	4	\$67,400	\$135,188	\$9330
St. James Winery, Inc.	St. James	Organics	1,000	12	\$175,500	\$2,500,000	\$49,000
St. Louis Composting	St. Louis	Wood	30,000	3	\$250,000	\$589,705	\$1,710,000
Service Recycling, LLC	Joplin	Wood	5,160	13	\$225,500	\$500,000	\$387,000
Summit Transfer, LLC	Lee's Summit	Const.	46,800	22	\$240,000	\$5,000,000	\$1,170,000
TOTALS			120,014	65	\$1,728,995	\$11,339,514	\$5,096.867

*Avoided Disposal Costs

Program Impact: FY 2025 Active Projects

These nine previously awarded, active projects benefited the Missouri economy and environment by achieving the following:

- Leveraged over \$11.3 million in total investment
- Created an estimated 65 Missouri jobs
- Diverted an estimated 120,000 tons from Missouri landfills annually
- Avoided over \$5 million in estimated disposal costs for the materials used in these projects each year



Missouri Market Development Program

Informational Services

Working Toward Solutions

Information sharing is an important aspect of the Missouri Market Development Program's efforts to help build Missouri's recycling infrastructure. The program provides resources and informational services to businesses, governments and other organizations to increase manufacturing, marketing or purchasing of recycled content products.

During the fiscal year, staff advised businesses on market conditions, locating recovered material feedstocks, identifying markets, developing products and creating business presentations. Staff also responded to requests for information on marketing, planning assistance and markets for recyclables from governments and not-for-profit organizations. The program also assisted businesses, governments, organizations and individuals in locating specific recycled-content products.

Missouri Market Development Program staff promoted Missouri's recycling industry and the "buy recycled" message in speaking engagements and workshops and participated in state, regional and national recycling issue conferences and meetings.

Staff develop and maintain information for a Missouri Market Development Program web site (www.eiera.mo.gov/mo-market-dev-program) and continue to gather and refine information for future web publication. The web site enables businesses to download the Missouri Market Development Program Application for Financial Assistance and access other program publications and information.

During the fiscal year, Missouri Market Development Program staff supported and participated in state, regional and nation-wide organizations and activities to gain and share knowledge and to develop professional relationships in the areas of recycling, economic development, solid waste and related environmental or business areas. Active involvement in these initiatives enables Missouri Market Development staff to approach problem solving from many perspectives and better facilitate growth of Missouri's recycling businesses.



Missouri Market Development Program

Outlook

Focusing on Opportunity

Economy

The economic benefits of recycling versus landfill disposal may seem negligible at the front end, but as materials flow further downstream, the value of the commodity increases, as do the wages and skilled labor required to turn the commodity into an end product. Reuse or recycling extracts the maximum economic and functional value created during the original production process. Recycling is estimated to create nearly five times as many jobs as landfilling. The recycling industry is an elaborate and diverse network of public sector institutions and private industry. Recycling involves not only collection, but also processing and manufacturing. At each level, jobs are created and income is generated. Recoverable material disposed in a landfill is a leakage from the local economy.

Environment

The greatest environmental benefits of recycling are related to the conservation of energy and natural resources and the prevention of air and water pollution when a recycled material is used to make a new product. Using recovered rather than virgin materials also helps stimulate Missouri's development of new technologies. The benefits of developing markets for recovered materials are found at every stage of the life cycle of a consumer product - from the mining of raw materials through its use and final disposal.

Opportunities and Challenges

Recycling collection and diversion play a critical role in reducing the volume of waste sent to landfills and recovering valuable materials for reuse. Across the state, a range of programs and infrastructure support the separation, collection, and movement of recyclable materials, from drop-off containers to processing facilities. While Missouri has made great strides in recycling since 1990, a large amount of recyclable material continues to be landfilled and much of our recovered material continues to flow out of state, often to other countries where it is used in manufacturing products that are then resold to the United States.

According to the 2025 Burns and McDonnell Sustainable Materials Management Plan, 5,272,436 tons of waste were disposed of in Missouri sanitary and demolition landfills in 2023, representing a daily per capita disposal rate of 4.66 lbs. per person. Approximately 52 percent of the landfill composition consisted of three primary waste types: organics at 24 percent, paper at 17 percent, and plastics at 11 percent. These materials, if recovered, could provide a significant economic impact in the way of job creation, materials recovery, increase in landfill diversion, etc.

Manufacturers that use recovered materials do so in lieu of feedstocks that are mined, harvested or extracted outside of the region. As a result, these businesses create jobs closer to home and have a smaller environmental footprint than companies that rely on raw material extraction. The Missouri Market Development Program acts to counter-balance foreign demand by developing local markets that will in turn create jobs and broaden the domestic tax base. Recycling market development feeds directly into building Missouri jobs, supports larger, private sector investments, promotes resource efficiency and spurs new technologies.



Environmental Improvement
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