

Recycling: Now, Soon and the Future

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What you'll learn today

Recycling's top three myths

**Why Gary Anderson, Duffy St. Pierre
and Malcolm McLean are recycling's
top heroes**

Nine critical trends

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Myth No. 1: Recycling lacks substantial success

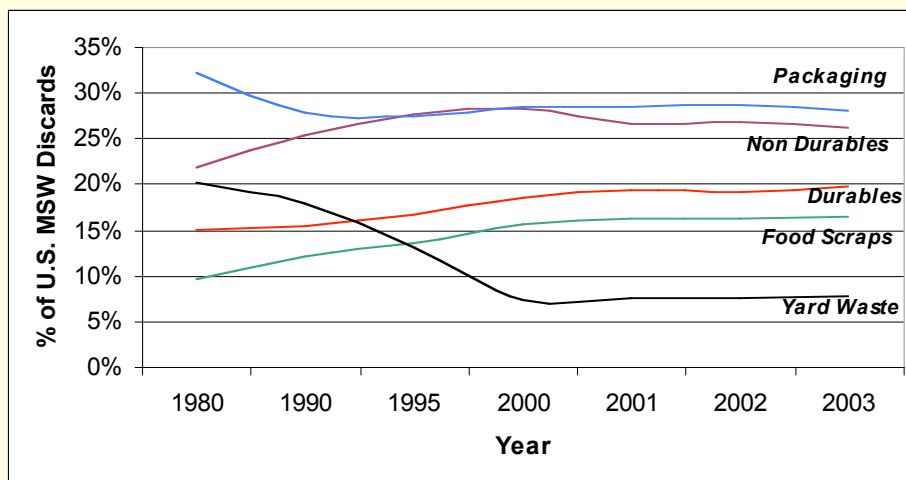
“Recycling isn’t a significant waste management strategy.”

“Recycling will never work in our community.”

“Recycling wastes more energy than it saves.”

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Trends in U.S. MSW Discards (as a % of total discards)



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Myth No. 2: Too much material is being collected

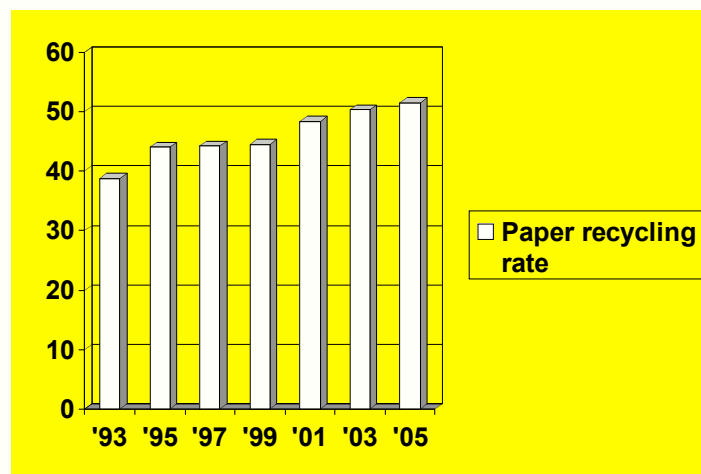
“Large amounts of collected materials end up being landfilled.”

“Industry doesn’t want secondary materials.”

“Recycling demand is insufficient.”

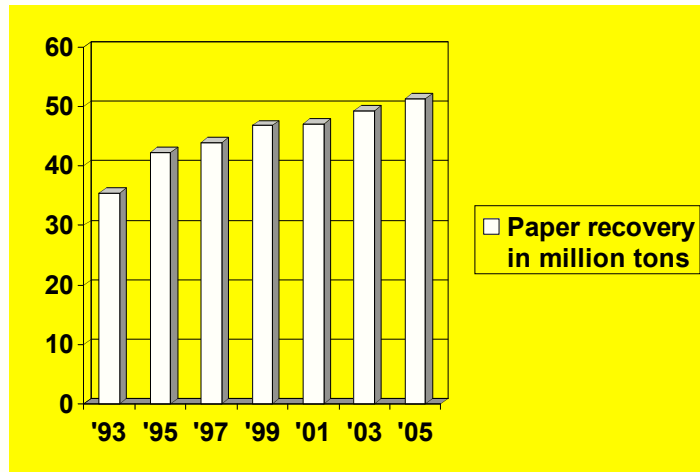
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Yes, we continue to grow



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Yes, we continue to grow



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Myth No. 3: Government doesn't care anymore

“Little is happening on the legislative front.”

“Recycling issues no longer resonate.”

“I fear programs will be gutted.”

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On the horizon

Fewer wide swings in recycling prices

An increase – not a decline – in collections

**Lots of talk – but no action – in
Washington**

**Little landfill pressure regionally and
national**

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On the horizon: Less market volatility

**New consolidations and mergers
in the U.S. recycling industry will
produce an additional reduction
in market instability and volatility.
You can expect fewer sharp
peaks and valleys in prices.**

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On the horizon: Rising collections

Today's test: What do the following communities have in common?

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What do these communities share?

- Jacksonville, AL
- Talladega, AL
- Carlisle, AR
- Nogales, AZ
- Tucson, AZ
- Blythe, CA
- Fresno County, CA
- Los Angeles, CA
- Oakland, CA
- Palmdale, CA
- Rio Dell, CA
- Sacramento, CA
- San Diego, CA
- San Francisco, CA
- San Jose, CA
- San Leandro, CA
- Santa Cruz, CA
- Stockton, CA

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What do these communities share?

- Sutter, CA
- Weed, CA
- Yuba, CA
- Aspen, CO
- Denver, CO
- Durango, CO
- Fort Collins, CO
- Loveland, CO
- Groton, CT
- Roswell, GA
- Honolulu, HI
- Des Moines, IA
- Keokuk, IA
- Crest Hill, IL
- Manteo, IL
- Peotone, IL
- Springfield, IL
- Trenton, IL

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What do these communities share?

- Urbana, IL
- Fort Wayne, IN
- Syracuse, IN
- Tell City, IN
- Bel Aire, KS
- Butler County, KS
- Conway, KS
- Manhattan, KS
- Henderson, KY
- Slidell, LA
- Barnstable, MA
- Bourne, MA
- Townsend, MA
- Frederick Co., MD
- Hagerstown, MD
- Rising Sun, MD
- Oakland, MD
- Saginaw, MI

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What do these communities share?

- Shelbourne Co. MN
- Kansas City, MO
- O'Fallon, MO
- Jackson, MS
- Kernersville, NC
- Mecklenburg Co. NC
- Orange County, NC
- Winston-Salem, NC
- Omaha, NE
- Concord, NH
- Nashua, NH
- Portsmouth, NH
- Raymond, NH
- Albuquerque, NM
- Bernalillo Co., NM
- Broome County, NY
- New York, NY
- Akron, OH

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What do these communities share?

- Tiffin, OH
- Beaverton, OR
- Eugene, OR
- Hood River, OR
- La Grande, OR
- Madras, OR
- Portland, OR
- Gloucester, RI
- Little Compton, RI
- Portsmouth, RI
- Richmond, RI
- Warren, RI
- Woonsocket, RI
- Aberdeen, SD
- Memphis, TN
- Nashville, TN
- Dallas, TX
- El Paso, TX

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What do these communities share?

- Plano, TX
- Sherman, TX
- Waxahachie, TX
- Bluffton, UT
- Lehi, UT
- Murray, UT
- Ogden, UT
- Salt Lake City, UT
- Alexandria, VA
- Franklin, VA
- Loudon County, VA
- Norfolk, VA
- Carnation, WA
- Federal Way, WA
- Kirkland, WA
- Seattle, WA
- Snohomish Co. WA
- Winnebago Co. WI

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On the horizon: Hot air in Washington but little else

While multi-state recycling initiatives show promise, do not count on Washington to provide leadership in materials recovery and waste reduction.

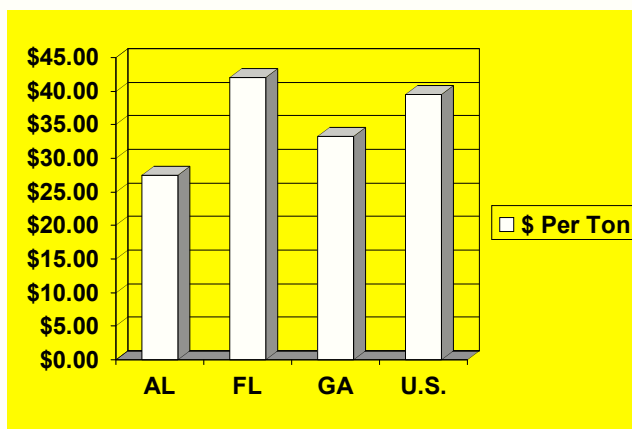
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On the horizon: Less talk about the “landfill crisis”

Recycling and composting provide many major benefits, but saving landfill capacity is not as important as originally thought.

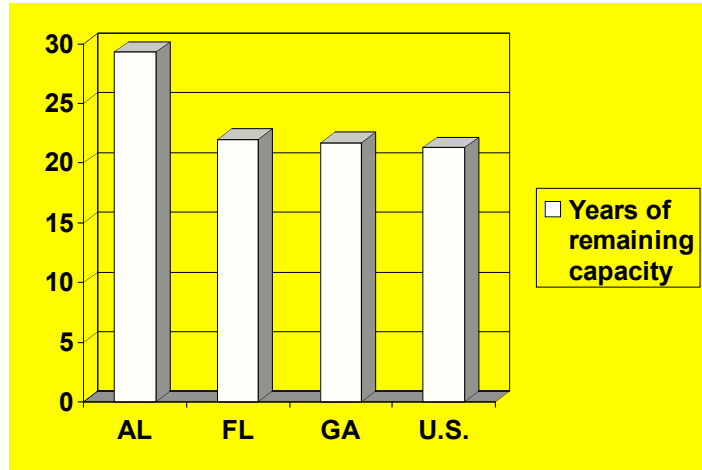
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Disposal rates are a key recycling driver



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But there's little pressure here and elsewhere



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Trend No. 1: Toxics

Nasty things are taking precedence over heavy things.

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Trend No. 2: Stewardship

Product stewardship initiatives will prevail in the last half of this decade in this region and elsewhere in the U.S.

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Trend No. 3: Food

Food scraps are one of the major opportunities for communities to reduce waste flows.

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Trend No. 4: Convenience

American consumers and businesses have shown they'll do more in recycling if you make it more convenient.

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Trend No. 5: Safety

The evidence shows we are not doing enough to make recycling jobs safer. As a result, regulatory pressure will increase.

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Trend No. 6: Energy

The rising costs of oil will both aid and harm recycling. Our current practices will change dramatically.

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Trend No. 7: Deindustrialization

Pre-consumer recycling will be harmed by our declining industrial base, and U.S. recycling consumption will continue to slump.

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The sad case: paper

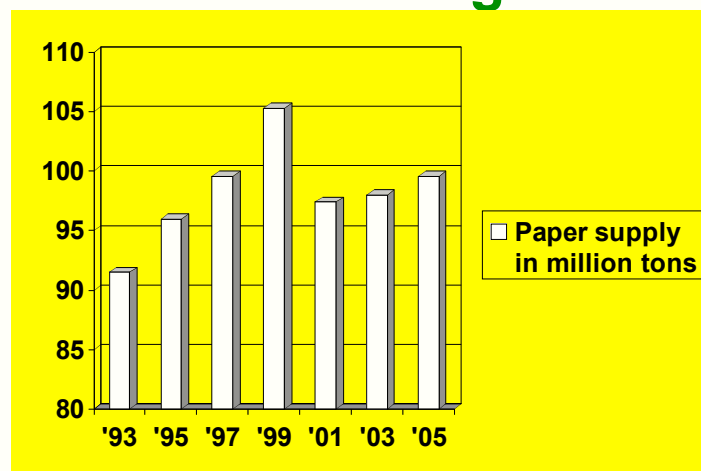
Recycled paperboard: down 14 percent in capacity this decade

Newsprint peaked in 2000, now down 23 percent for the decade

Industry production capacity to decline 0.5 percent in 2006-8

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The paper industry is hurting



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Trend No. 8: China

Seismic recycling market changes are underway. But a question remains: Will they be viable in the future?

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Exports are important in this region

Corrugated containers 120,037 tons

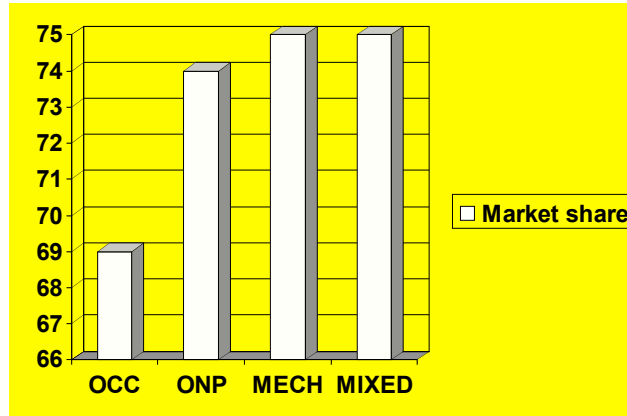
Mixed paper 123,214 tons

Aluminum scrap 15,956 tons

2005 for the Miami and Tampa shipping districts

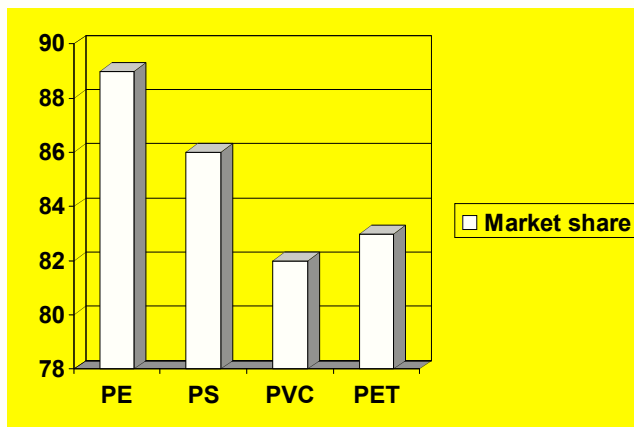
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China's remarkable export market share



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China's remarkable export market share



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Trend No. 9: Reframing

Efforts will be made in the next few years to rekindle the public's interest in materials recovery.

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Drop me a line

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