

Recycling: Now, Soon and the Future

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Resource Recycling

Portland, Oregon

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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

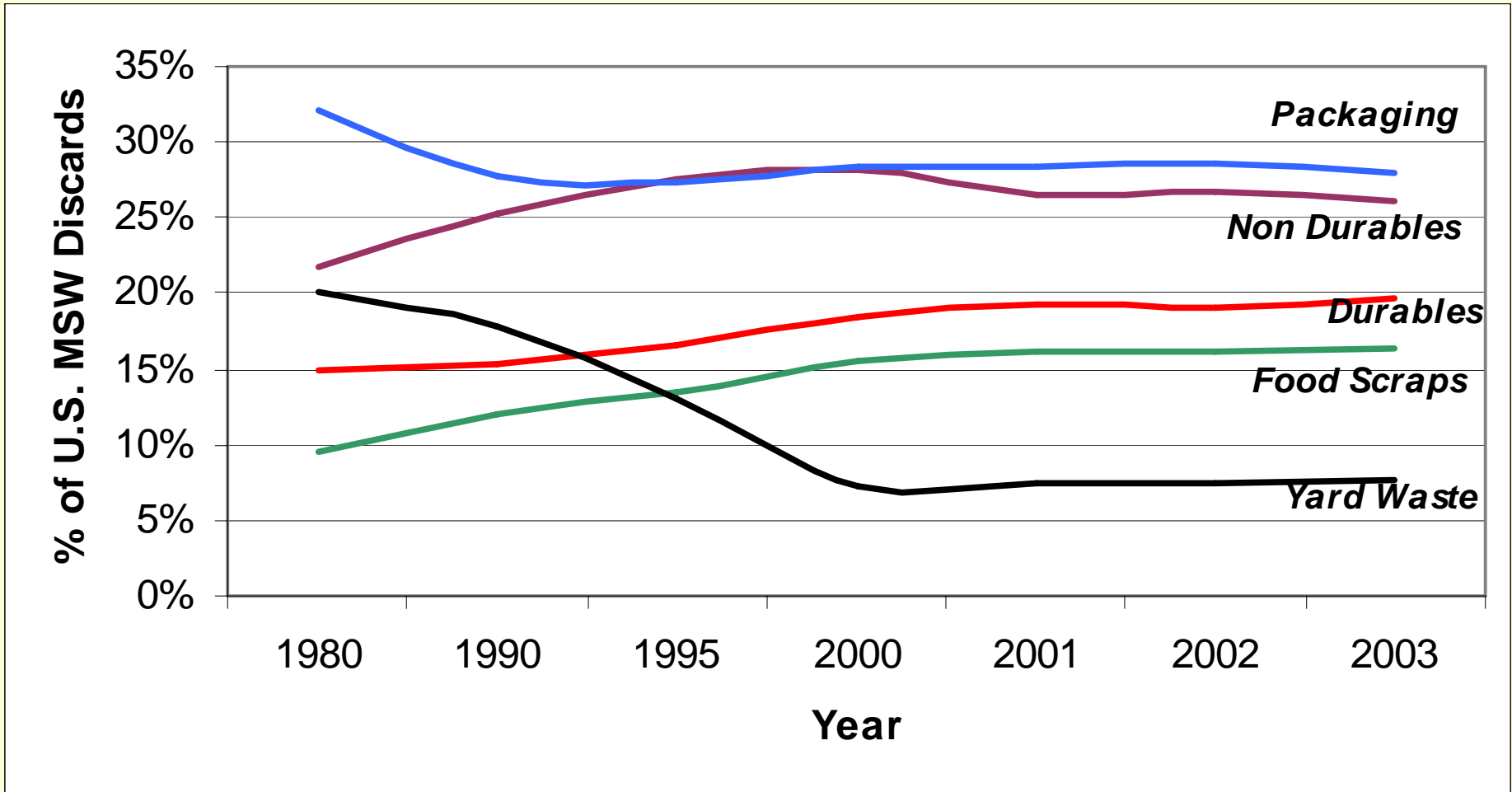
Myth No. 1: Recycling lacks substantial success

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

“Recycling will never work in our community.”

“Recycling wastes more energy than it saves.”

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



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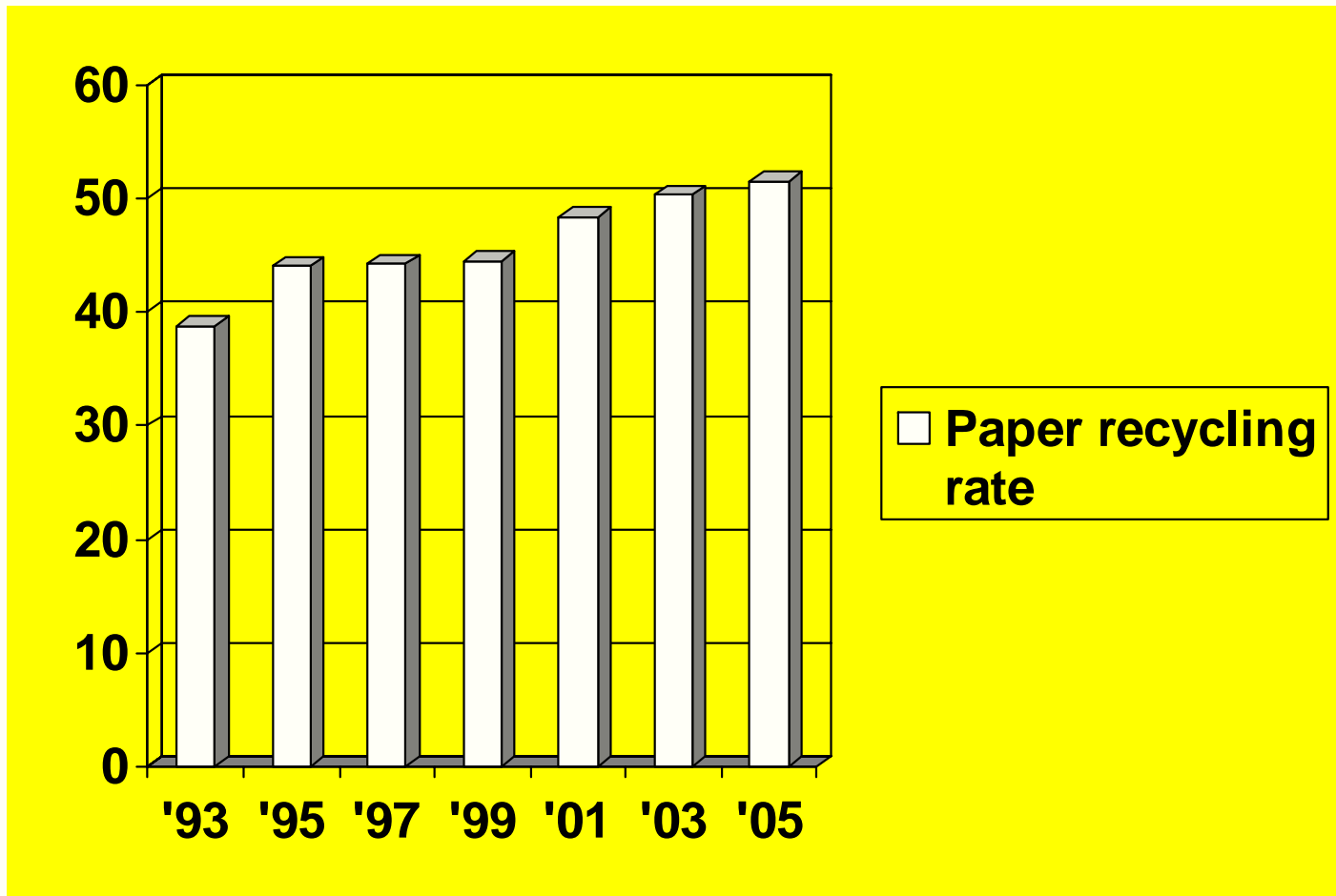
Myth No. 2: Too much material is being collected

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

“Industry doesn’t want secondary materials.”

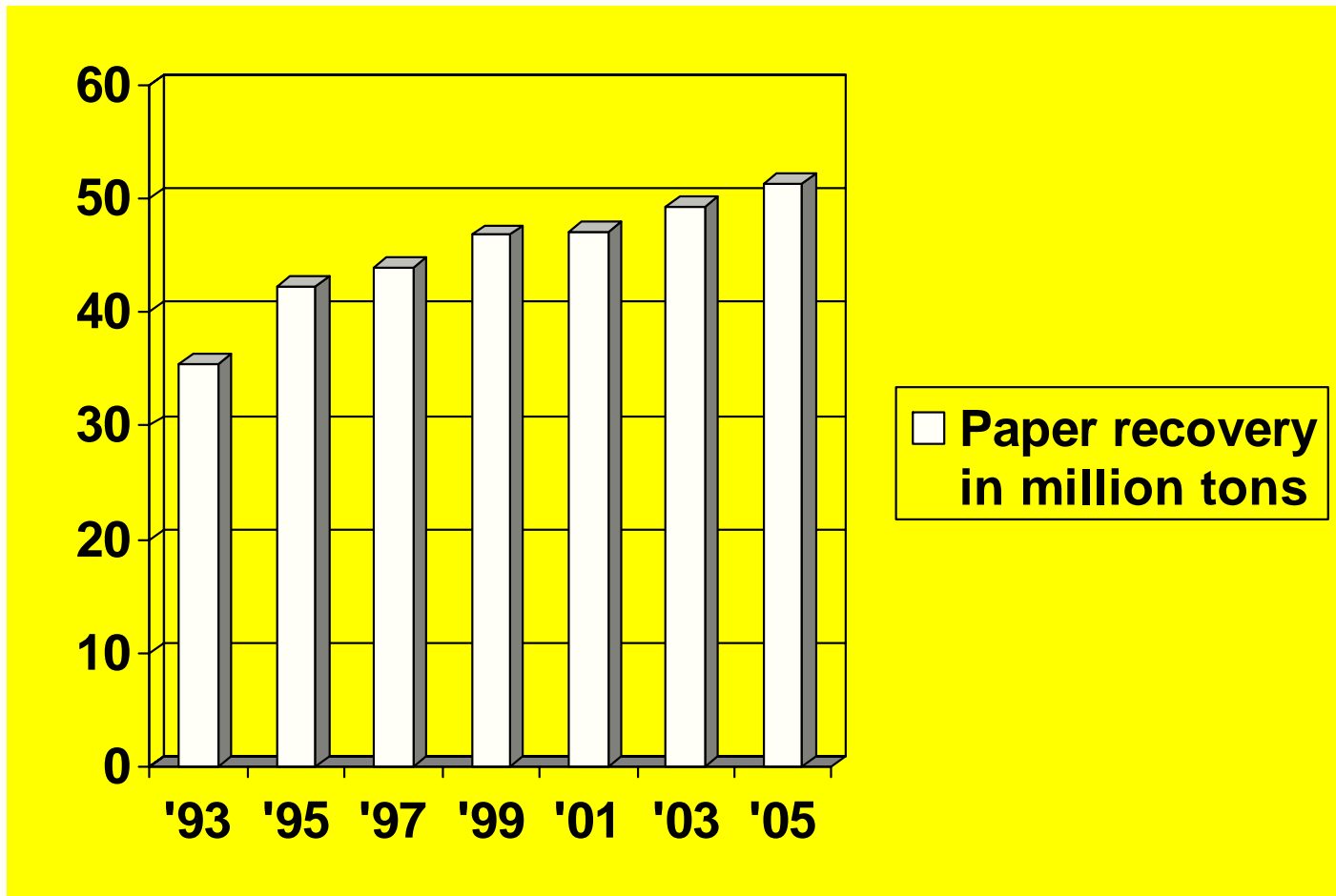
“Recycling demand is insufficient.”

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.”

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**

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.

On the horizon: Rising collections

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

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

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

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

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

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

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

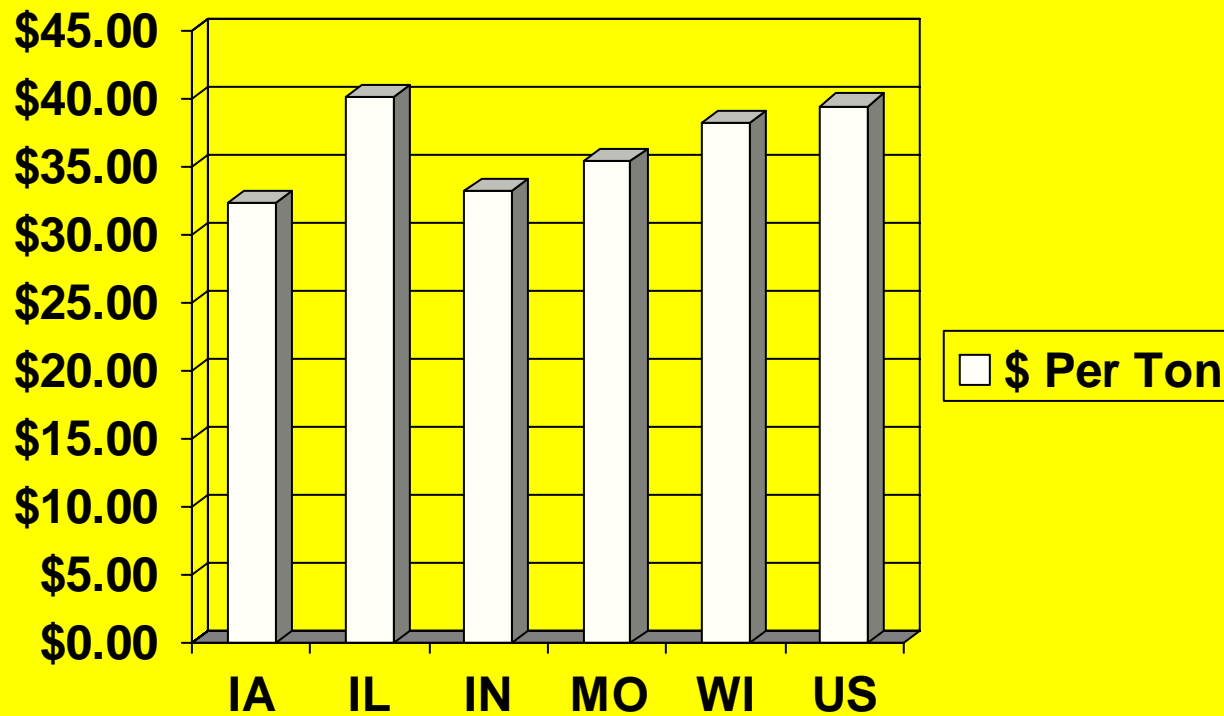
On the horizon: Hot air in Washington but little else

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

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

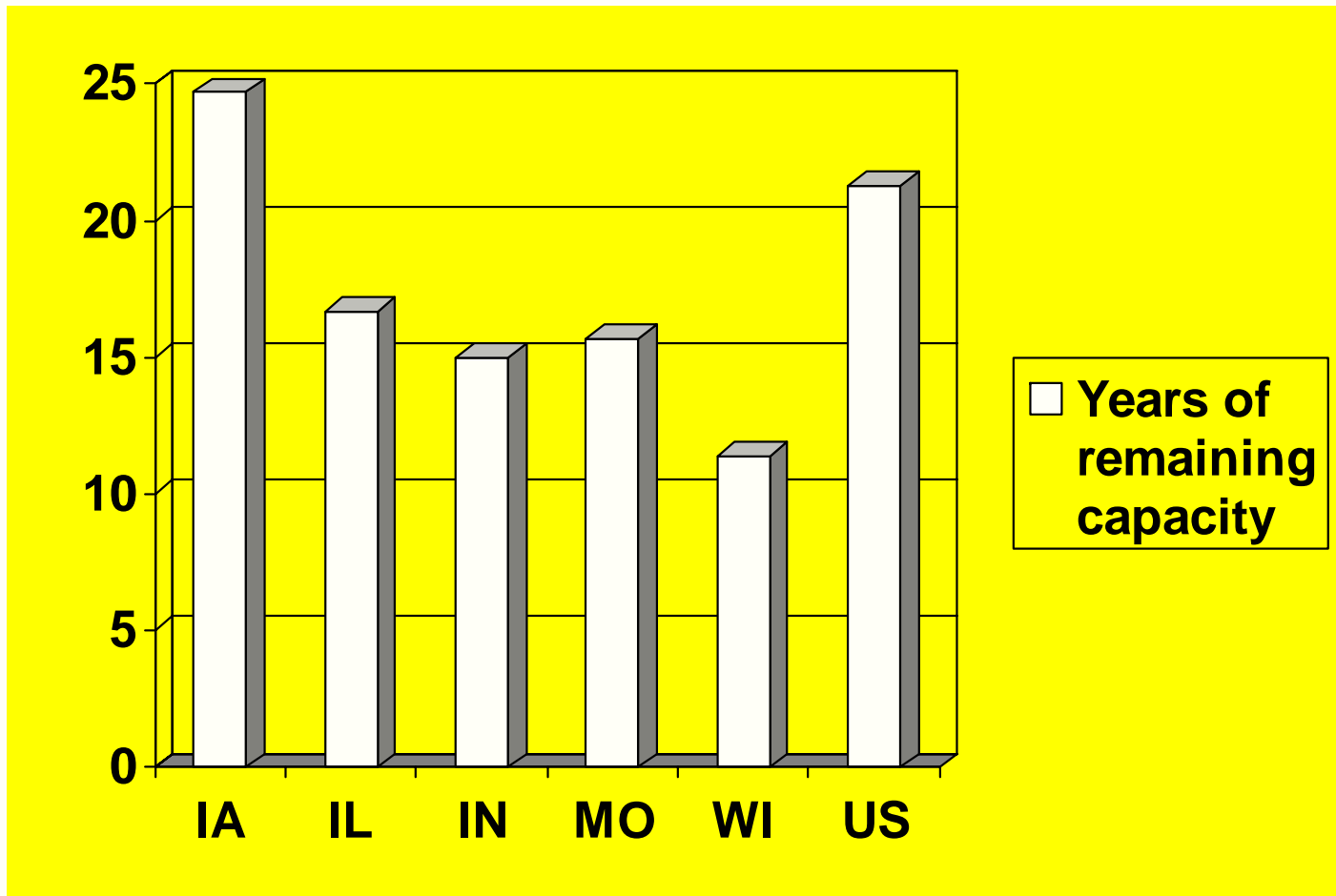
**Recycling and composting
provide many major benefits,
but saving landfill capacity is
not as important as originally
thought.**

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.

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.

Trend No. 3: Food

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

Trend No. 4: Convenience

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

Trend No. 5: Safety

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

Trend No. 6: Energy

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

Trend No. 7: Deindustrialization

Pre-consumer recycling will decline due to our declining industrial base, and U.S. recycling consumption will continue to slump.

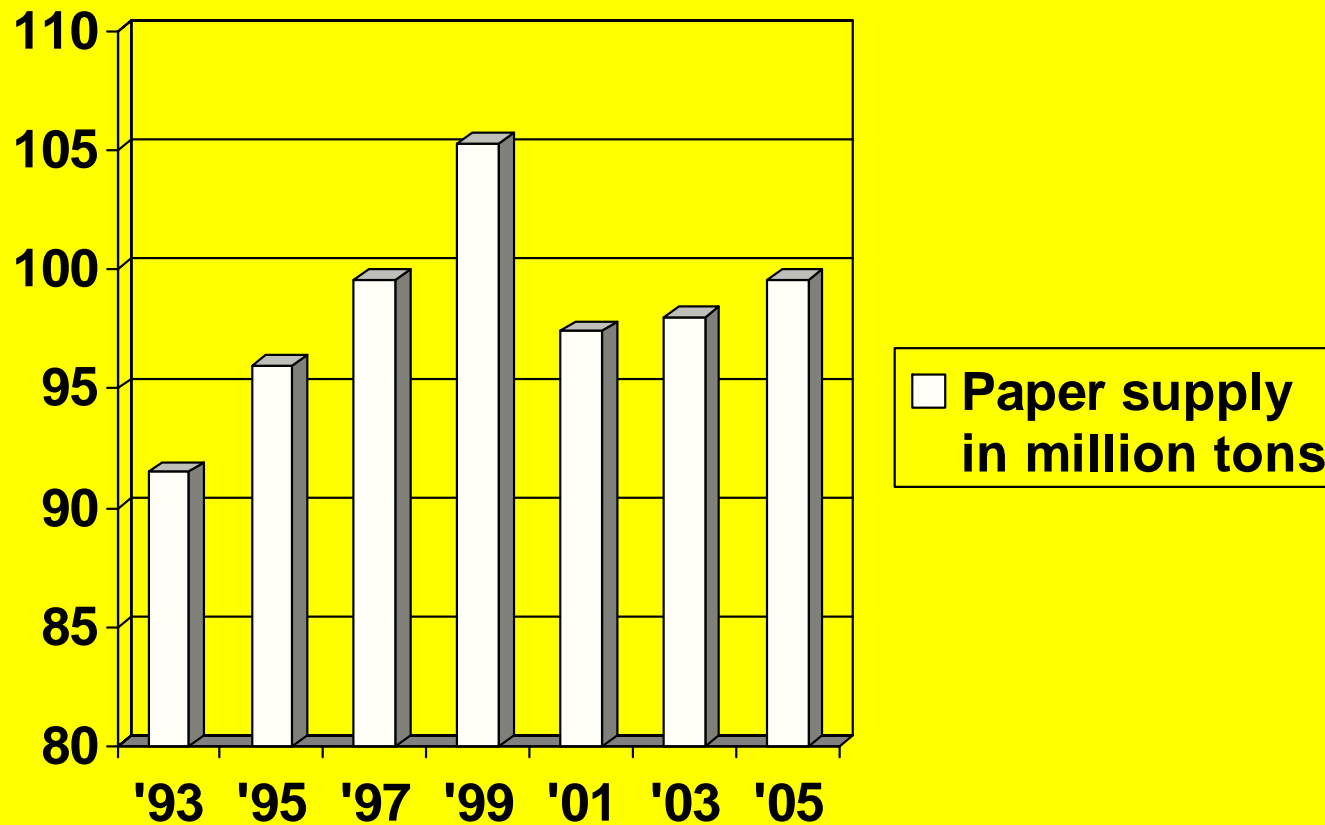
The sad case: paper

Recycled paperboard: down 14 percent in capacity this decade

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

Industry capacity to decline 0.5 percent in 2006-8

The paper industry is hurting

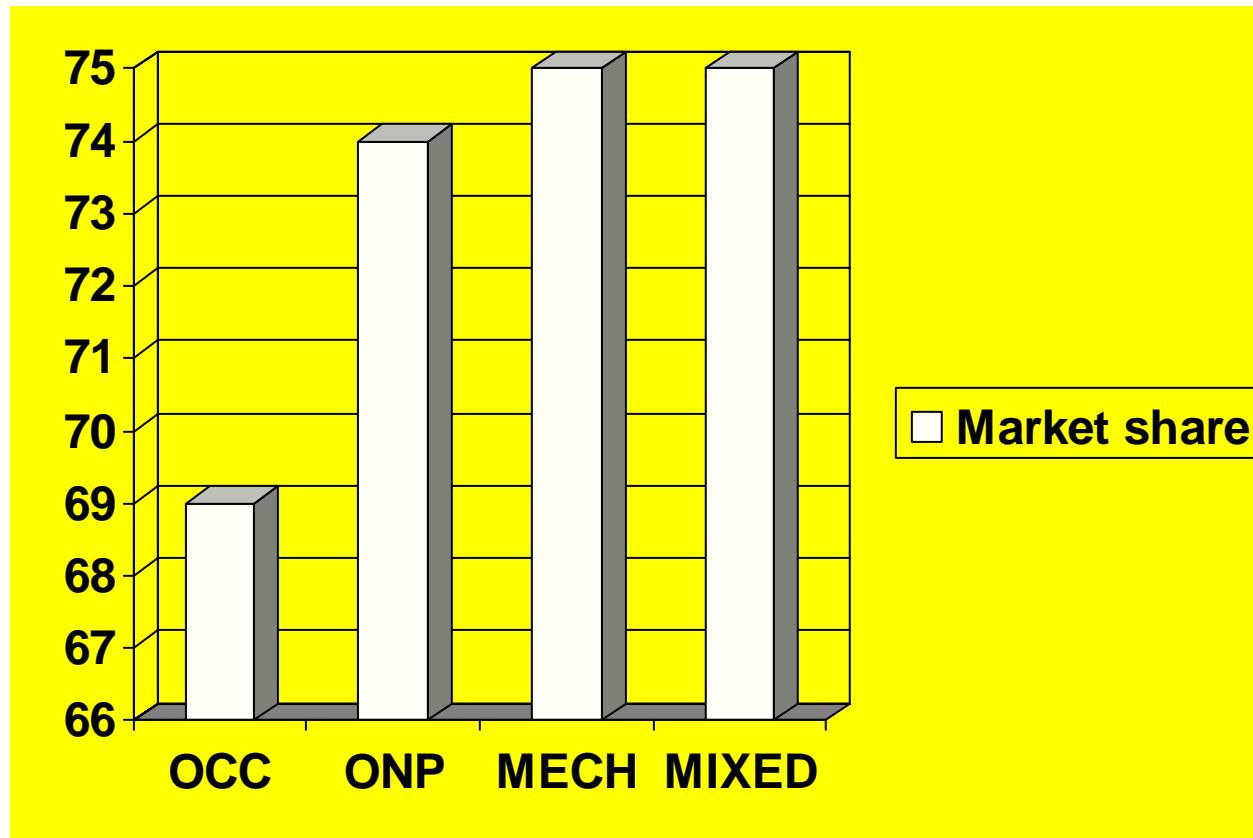


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Trend No. 8: China

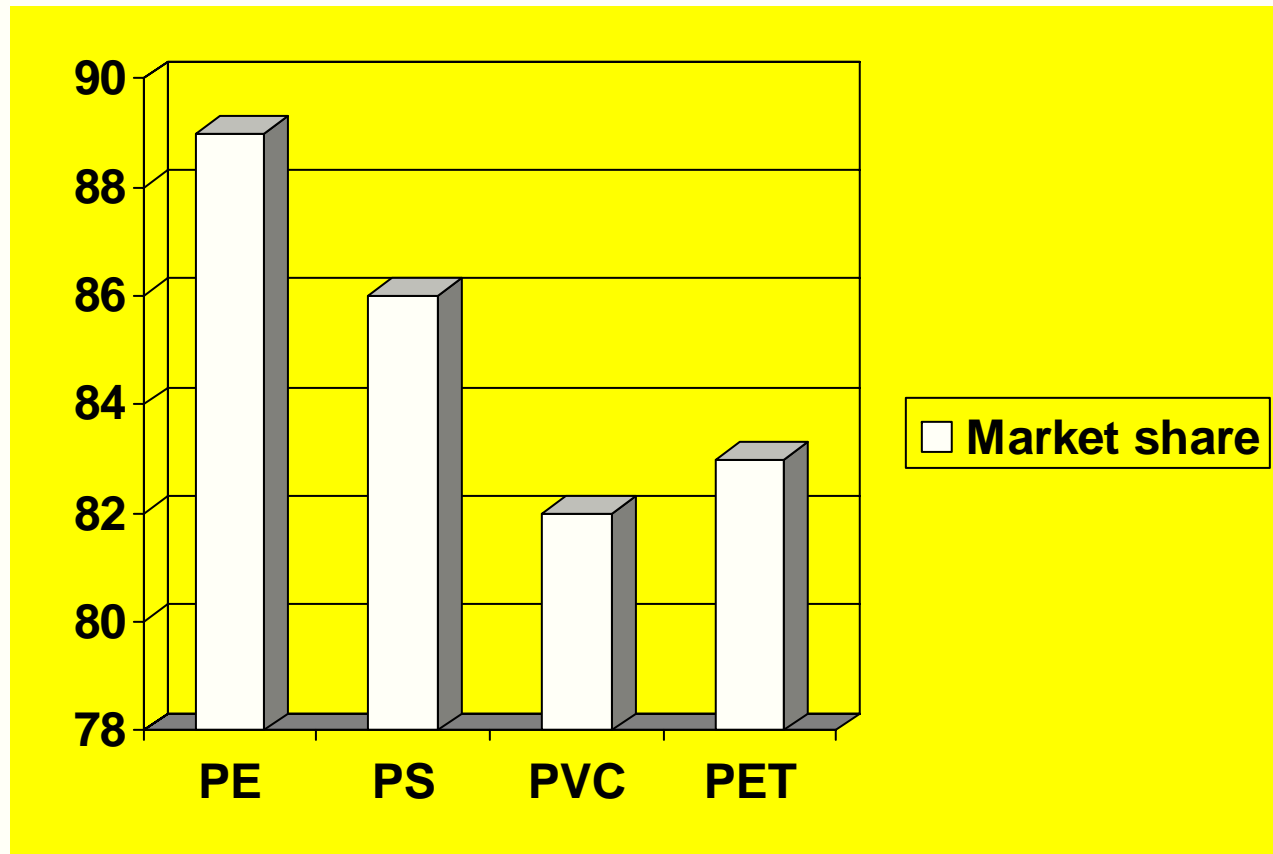
Seismic recycling market changes are underway. But a question remains: Will they be viable in the future?

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.

Drop me a line

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