

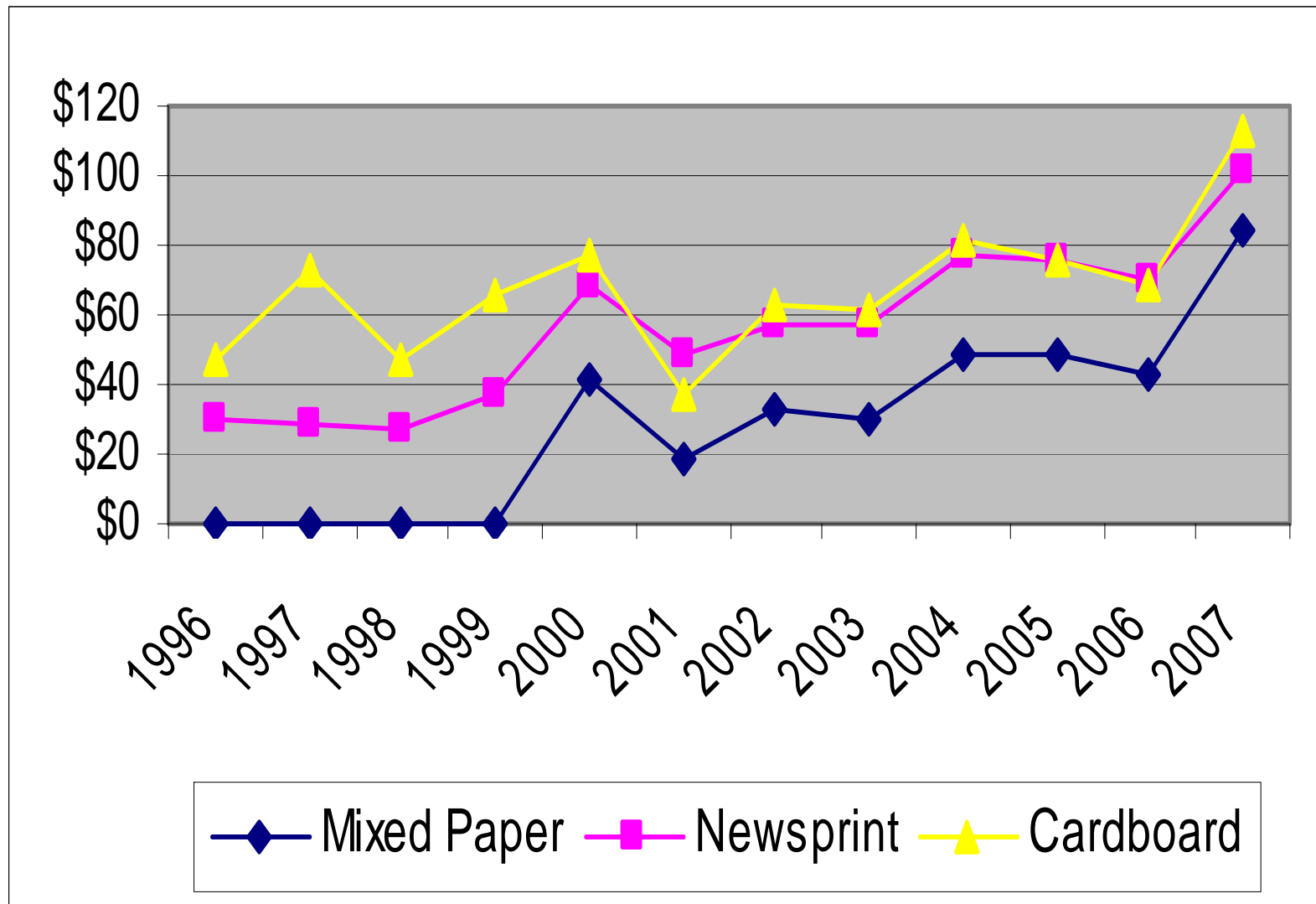
North Carolina Recycling Overview

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NC DPPEA

Summary of Main Points

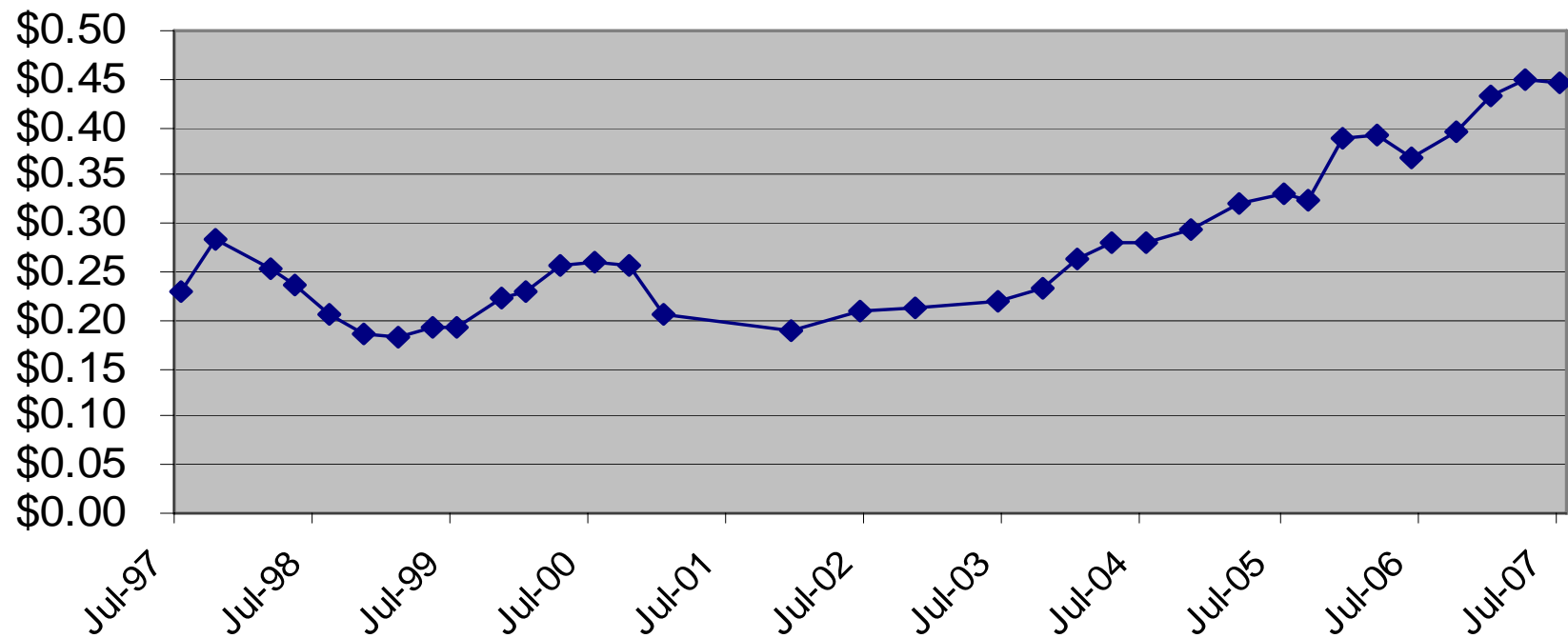
- Markets still very strong for many materials.
- Increase in local government recycling helped reduce landfilled tonnage in FY07, but still much room for improvement.
- ABC permit-holder recycling requirements now in force.
- Product stewardship helping tackle difficult waste streams.
- Issues and concerns still left to be addressed.

Paper Prices Moving Upward



Increases in Container Recycling Prices – Aluminum and Plastic

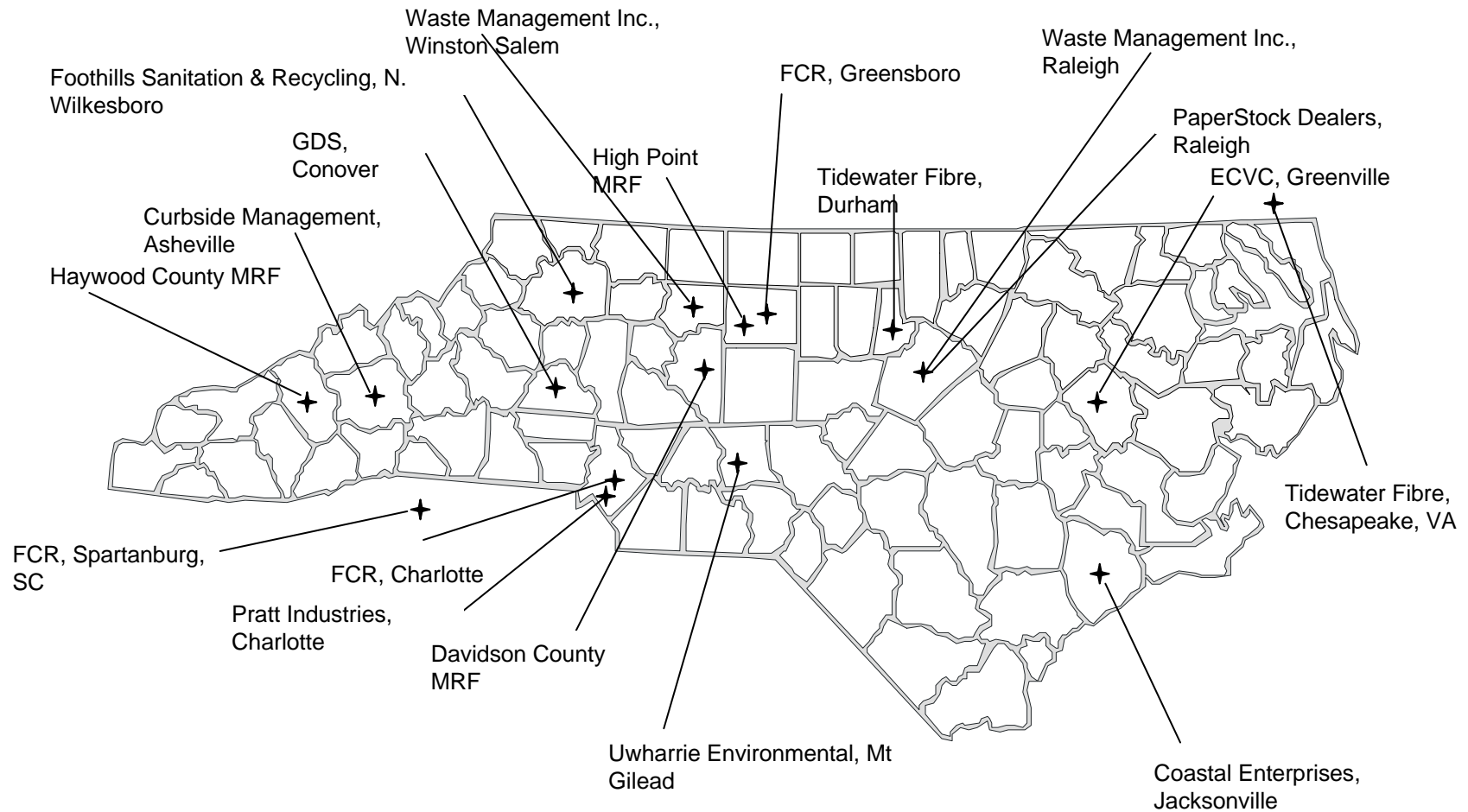
**Combined Price Per Pound Paid to NC MRFs by
End-Users for Aluminum, PET, and HDPE**



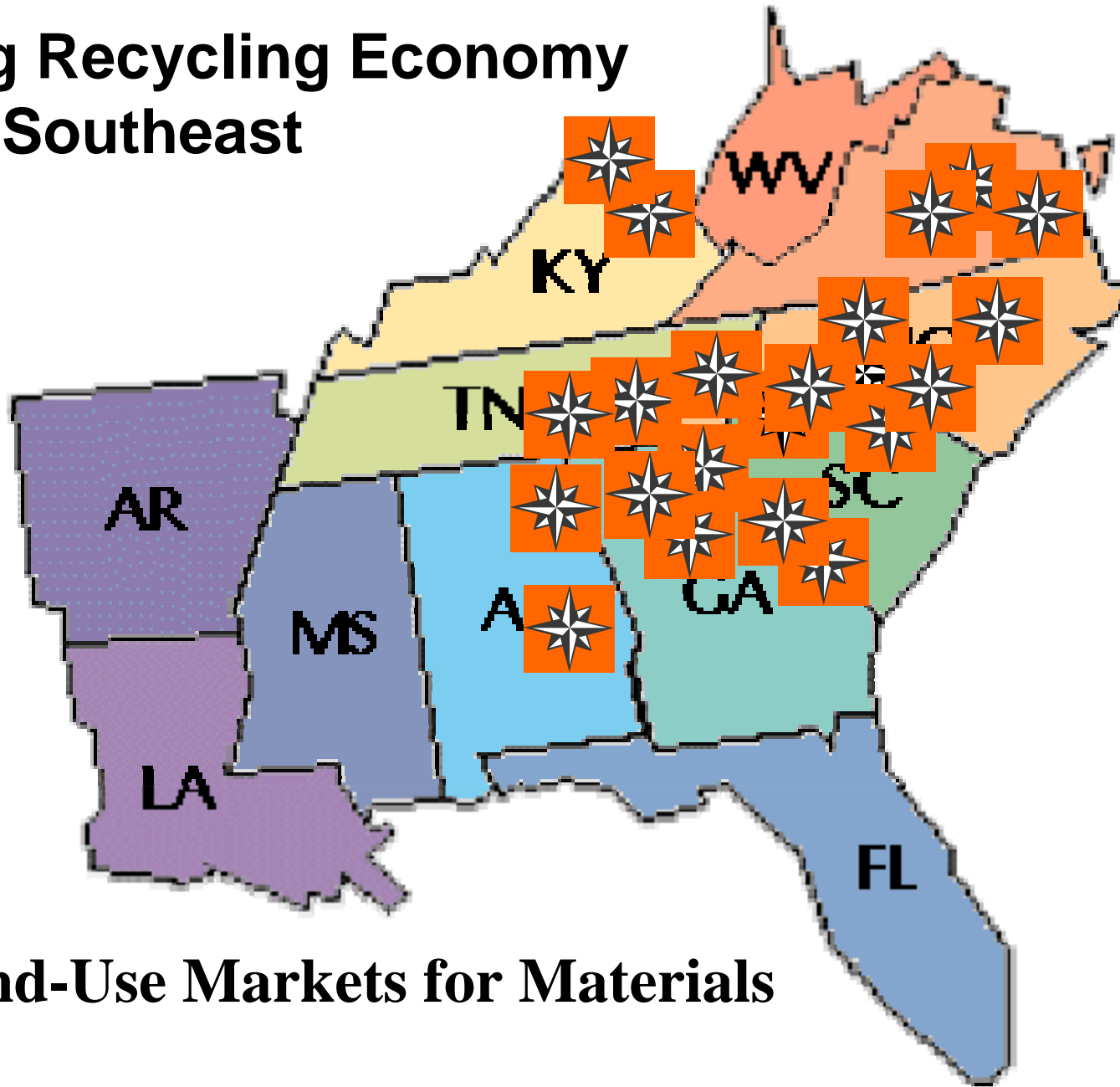
Major Market Developments

- Coca Cola opening \$60 million plastic bottle recycling plant in Spartanburg, SC.
- Large new processing facility opened by Pratt Industries in Charlotte.
- PRC Industries, an appliance refurbisher, bringing new plant and 288 jobs to McDowell County.
- Capacity expansions in 2007 by recyclers of electronics, wallboard, wood, organic wastes, plastics, and metals.

Material Recovery Facilities (MRFs) Serving North Carolina



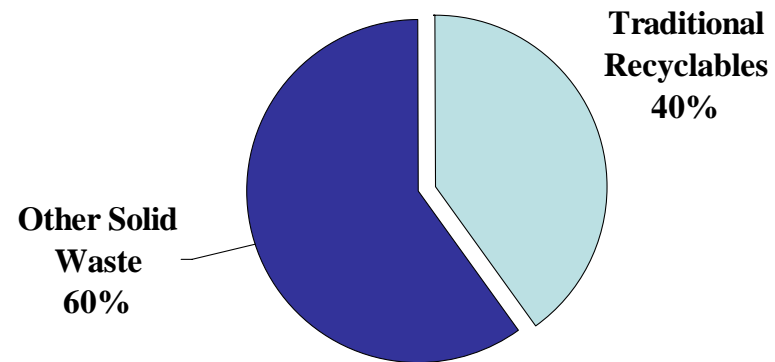
Strong Recycling Economy in the Southeast



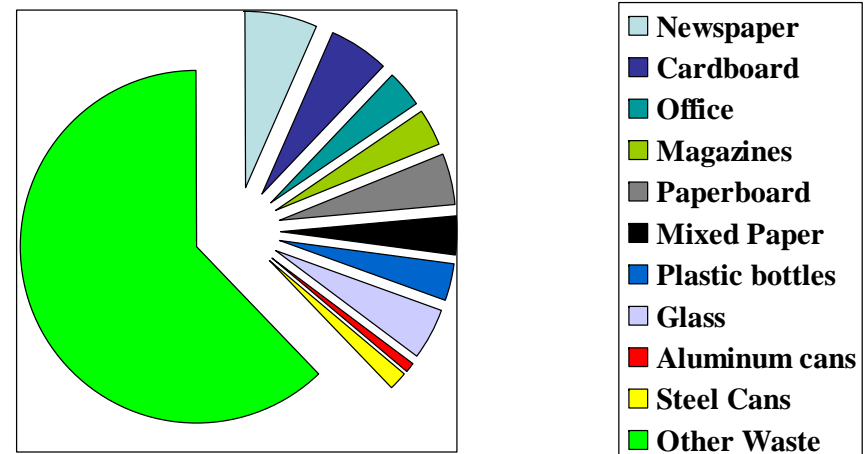
End-Use Markets for Materials

Underachieving Household Recycling Potential

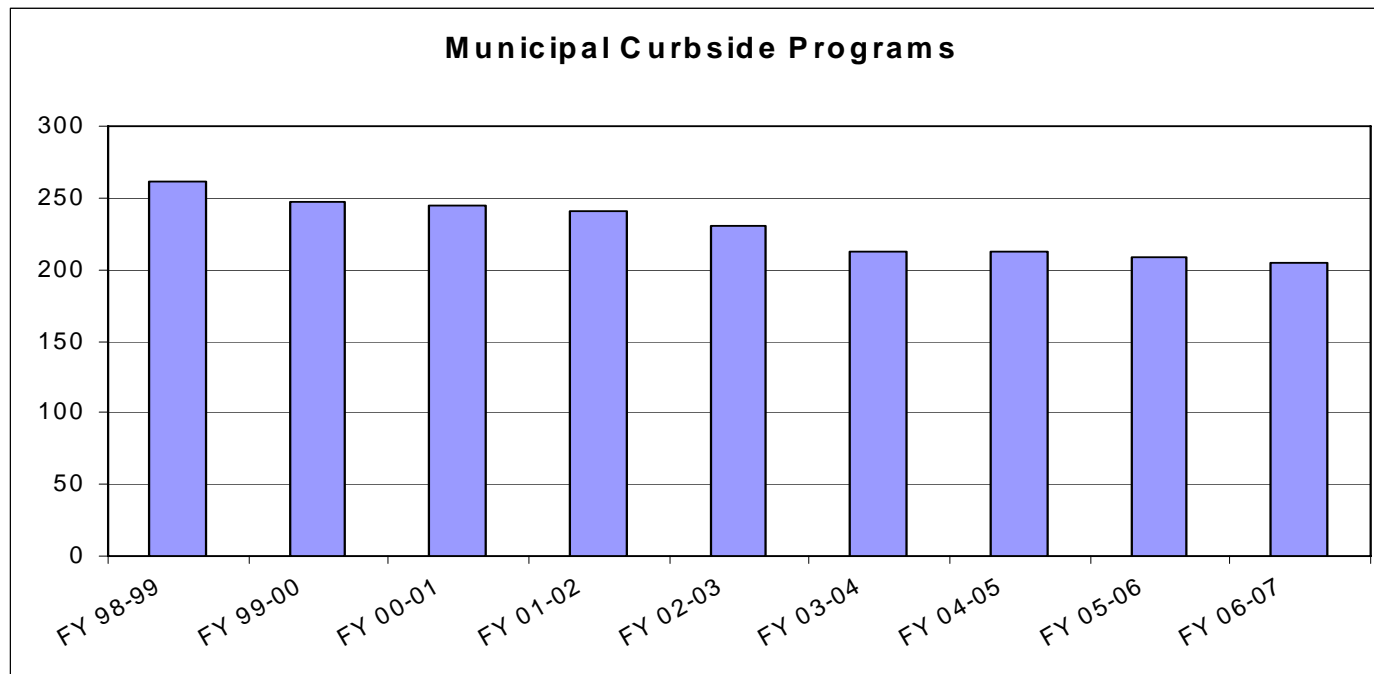
- 745 recyclable lbs. per household.
- 40% of a household's waste stream recyclable.



- Average local program only collecting 243 lbs per household served.



Decline in Curbside Programs

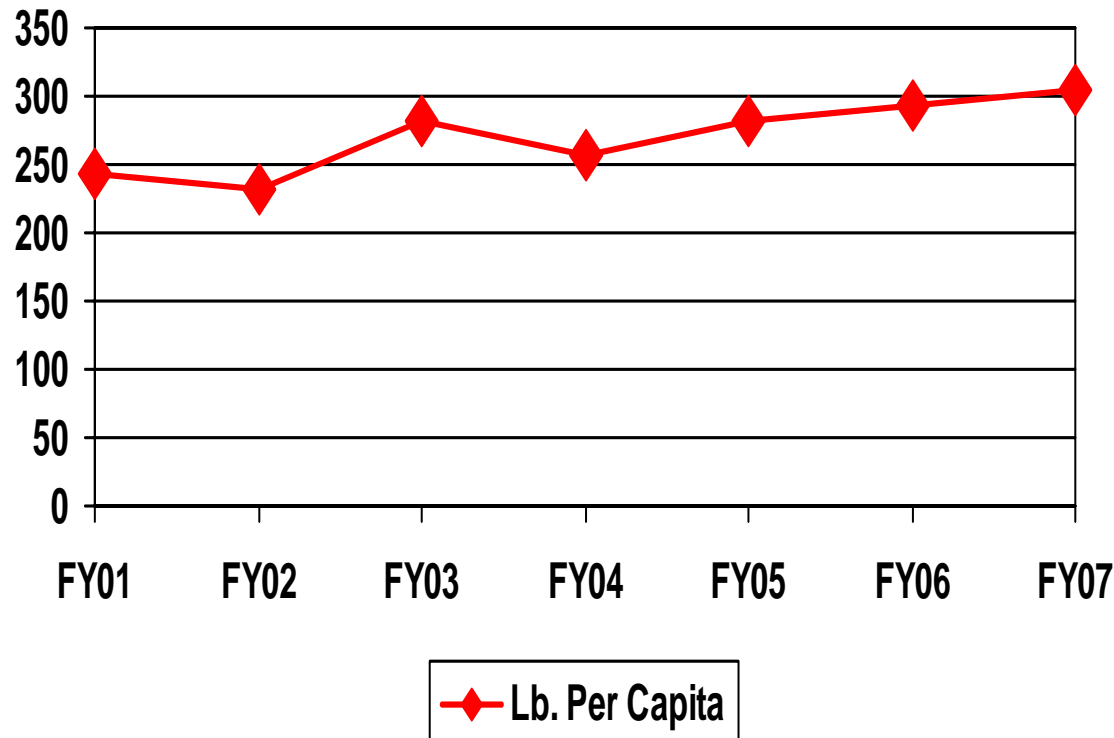


- Curbside Programs are down, but the number of households served by curbside programs is up.
- Overall Curbside tonnage up 12.5% in FY07, or 21,071 tons.

Some Local Governments Making Strides

- New and pending curbside programs in Cabarrus County, Mooresville, Fayetteville, and other towns.
- More grassroots support for recycling programs.
- Some programs modernizing: e.g. Wake Forest conversion to carts raises participation to 97%.
- Good programs achieving high efficiency: e.g., Brevard's recycling program costs less than collecting and disposing solid waste.
- Overall local government recycling tonnages increased in FY 07.

Per Capita Recycling Slowly Increasing



- Ratio of Recycling to Disposal has stayed steady – recycling keeping pace with landfilling.
- Increase of 77,538 tons diverted by local governments, FY06 to FY07.

ABC Recycling Underway

- 8,000+ permit-holders beginning recycling efforts.
- Most having to pay for recycling services; some served by local governments.
- Exemptions granted where service not available.
- Program has spurred business development – at least 10 new companies started up in NC to collect ABC material.
- Program will result in more material for recyclers: glass, plastic, and aluminum (approx. 50,000 tons).



North Carolina Active on Product Stewardship Initiatives

- Some materials will require more industry involvement through “product stewardship.”
- Through Product Stewardship Institute, NC working with other states to address thermostats, phone books, paint, fluorescent lights, and other products.
- National Paint Agreement struck in 2007.
- NC, EPA, and other states in dialogue with beverage industry to increase container recycling.
- NC involved in national Carpet America Recovery Effort (CARE).

Issues and Concerns

- Recycling Businesses Need More Material.
- Local Governments must do a better job of modernizing their programs:
 - Increasing participation
 - Adding materials
 - Increasing collection efficiency
 - Adding other services – e.g., school recycling
- Some materials may require special attention: e.g., fluorescent lights, pharmaceuticals.
- North Carolina needs an overall increase in public commitment to recycling.