

Introduction

MARKETS ASSESSMENT 1998

This Assessment of the Recycling Industry and Recycling Materials in North Carolina is the third analysis of the recycling industry conducted by the State of North Carolina. The assessment characterizes North Carolina's waste stream for 1997 and 2002 and focuses on supply and demand for 26 recyclable materials. It also discusses trends and highlights changes that have occurred during the years.

The first assessment, conducted in 1991 by the N.C. Department of Economic and Community Development (now the Department of Commerce), provided analyses of the recyclable materials and composting market systems within the state. The second assessment expanded the scope and range of the previous study and was conducted in 1994

by the N.C. Department of Environment, Health and Natural Resources (now the Department of Environment and Natural Resources, or DENR).¹ These analyses provide a foundation for the recycling market development efforts of the Division of Pollution Prevention and Environmental Assistance (DPPEA).

The 1998 assessment follows the general framework established in the previous assessments, including in-depth analyses of multiple commodities, five-year supply / demand projections, and North Carolina and regional supply / demand projections. A new focus on price history has also been incorporated into this assessment including discussion of the factors affecting price history as well as three and five year histories. The data provided were generally taken from *Waste Age's Recycling Times*, which provides ranges of prices for various regions of the country. These data are intended to provide only a general sense of the trend of price fluctuation, and more detailed or accurate price histories may be obtained from commodity-specific sources.

The remainder of the assessment is organized as follows:

Section 2 provides an *Executive Summary* that includes major assessment findings, priorities, and overall recommendations.

Section 3 addresses the components of the municipal solid waste stream in North Carolina. Several breakdowns of the waste stream are presented and an overall recycling rate is calculated. Summary data for all 26 commodities are also presented.

Section 4 comprises the bulk of the assessment. In this section, 26 commodities (representing 12 waste categories) are profiled and presented as stand-alone reports. Each *Commodity Profile* characterizes supply and demand in North Carolina and the region, evaluates the supply / demand relationship, and contains recommendations for balancing any discontinuities between supply and demand.

Section 5, entitled *Findings / Recommendations*, summarizes the results of the analyses of all commodities and assigns high, medium or low priorities to each waste category. This section also presents overall recommendations, which arise from more than one commodity or address toxicity issues for specific commodities (such as used oil filters and electronics).

¹ North Carolina General Statutes and a Memorandum of Understanding between the DOC and DENR directed DENR's Division of Pollution Prevention and Environmental Assistance (DPPEA) — formerly the Office of Waste Reduction — to prepare these assessment by March 1, 1994 and every other year thereafter.