

2024

ANNUAL REPORT

RECYCLING MARKET DEVELOPMENT ADVISORY COUNCIL

SOUTH CAROLINA
DEPARTMENT OF
COMMERCE



SOUTH
CAROLINA
DEPT. OF
COMMERCE
LAUNCH TO LEGACY

MESSAGE FROM THE SECRETARY



SECRETARY HARRY M. LIGHTSEY III

2024 was another notable year of industry recruitment for South Carolina. With an impressive \$8.19 billion in capital investment and more than 5,500 announced jobs, the Palmetto State's economic activity – especially that of our existing industry – remains strong. We have seen consistent growth among many of South Carolina's leading industries, including our recycling industry. The South Carolina Department of Commerce (S.C. Commerce) continues working to recruit and support companies that create a resilient and durable supply chain, and recycling plays an essential role in that effort.

A leader in the sector, South Carolina is home to over 300 recycling companies including collectors, processors, recycled product manufacturers and equipment makers. This industry is a vital part of our state's business community, contributing over \$13.6 billion to South Carolina's economy annually. With the dedication of the Recycling Market Development Advisory Council (RMDAC) and S.C. Commerce's Recycling Market Development Team, we will continue creating opportunities for all South Carolinians while ensuring business growth is economically and environmentally sustainable.

Our state is consistently welcoming innovative companies that advance the circular economy. In June 2024, Princeton NuEnergy broke ground on its flagship lithium-ion battery recycling facility in Chester County. The company's patented direct technology is used to recycle lithium-ion batteries from electric vehicles, consumer electronics, energy storage batteries and manufacturing scrap. Once complete, the facility is expected to produce enough battery-grade cathode material to power 100,000 electric vehicle batteries annually.

South Carolina also remains an exceptional place for recycling companies to start, grow and thrive. After more than eight decades in our state, DCC Metal Recycling continues to build on its Palmetto State legacy by announcing in March 2024 it would establish its seventh South Carolina operation in Dillon County. DCC Metal Recycling purchases, shreds and recycles scrap metals, significantly reducing the cost and environmental impact of the company's products.

When businesses choose South Carolina, they choose an unbeatable quality of life and breathtaking natural beauty. By emphasizing the balance between economic development and sustainability, we can protect what keeps the Palmetto State special and maintain South Carolina's legacy as one of the best places to live, work and play for generations to come.

A handwritten signature in black ink, appearing to read "Harry Lightsey". The signature is fluid and cursive, with a distinct "H" at the beginning.



RECYCLING MARKET DEVELOPMENT ADVISORY COUNCIL

RMDAC supports the economic growth of South Carolina's recycling industry through building recycling markets, increasing material recovery and promoting the recycling value chain.





RMDAC

RECYCLING MARKET DEVELOPMENT ADVISORY COUNCIL



Chair

Tina Green
Mumford Industries
Recycling Industry



Morgan Crapps
Redwood Materials
SC Commerce Representative



Norman Chandler

Republic Services
Solid Waste Industry



Kevin Richardson

City of Rock Hill
Municipalities



Angel Lara

Mid-Carolina Steel
Scrap Metal Industry



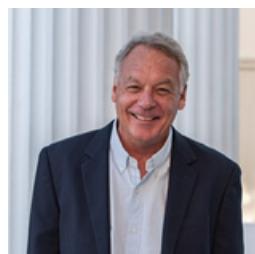
Carol James-Gilchrist

Sonoco Recycling
Paper Industry



Brad Dutton

Dutton Polymer Group
Plastics Industry



Chris Fisher

Fisher Recycling
Glass Industry



Jean Cecil Frick

NP Strategy
General Public



Dr. Andrew Spicer
Ph.D.

Darla Moore School
of Business
Higher Education



Becky Berube

United Catalyst
Corporation
Aluminum Industry



Jay Spears

Continental Tire
Tire Industry



Adam Padget

Green Energy Biofuel
Petroleum Industry



Ed Marr

Horry County Solid
Waste Authority
County Government



Glenn Odom
Emeritus Member

Wellman Plastics
Recycling Industry

SC Department of Commerce



Anna DeLage

Recycling Market
Development
Manager



Ashley June

Recycling Market
Development
Coordinator

RMDAC

RECOMMENDATIONS



1

Revisions to initial report: no revisions necessary to the initial report.

2

Description and analysis of Municipal Solid Waste (MSW) recycling during previous year. **The recycling rate for 2024 is 21.2%.** RMDAC will continue to work with businesses and industry to grow recycling markets and develop strategies to help increase the recovery and recycling of materials.

3

Recommendations regarding materials which should be added or deleted from source separation, recovery and recycling programs, and to increase the recovery of recyclable materials. RMDAC will continue to work toward recovery, recycling and sustainable material management options for the following: including, but not limited to, carpet, glass, plastic containers, metals, scrap tires, electronics, lithium-ion batteries, textiles, construction and demolition materials, organics, and universal wastes that can be recycled/repurposed.

4

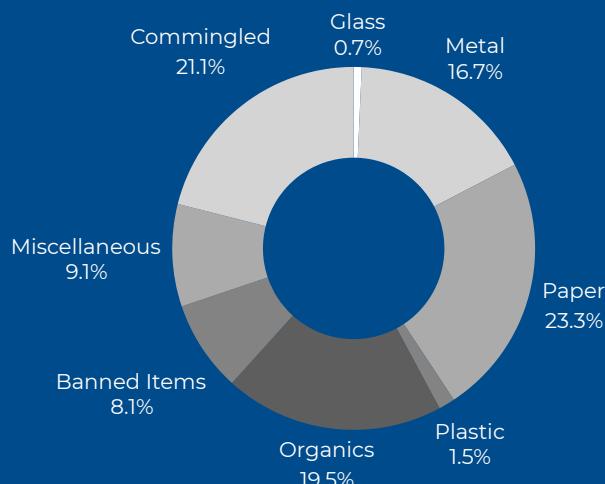
Any other recommendations, including tax incentives, to facilitate the development of markets for recovered materials or products in the state.

- Encourage recycling infrastructure in the design for multi-family establishments.
- Encourage companies to share best management practices for business recycling.
- Encourage businesses to adopt a framework for an economy that is restorative and regenerative by design.
- Encourage the use of scrap tire rubber to be incorporated into asphalt paving mixes for road construction. Develop partnerships to find alternative ways of using recycled tires for higher-end uses.
- Secure funding for a recycling market development grant to assist with capital costs for physical infrastructure to increase the capacity or improve efficiency of a recycling operation.
- Support a plan to bolster lithium-ion battery recycling infrastructure to support the state's growing electric vehicle economy.
- Encourage medium-sized to large companies to report recycling data.

2024 SC Recycling Rate: 21.2%

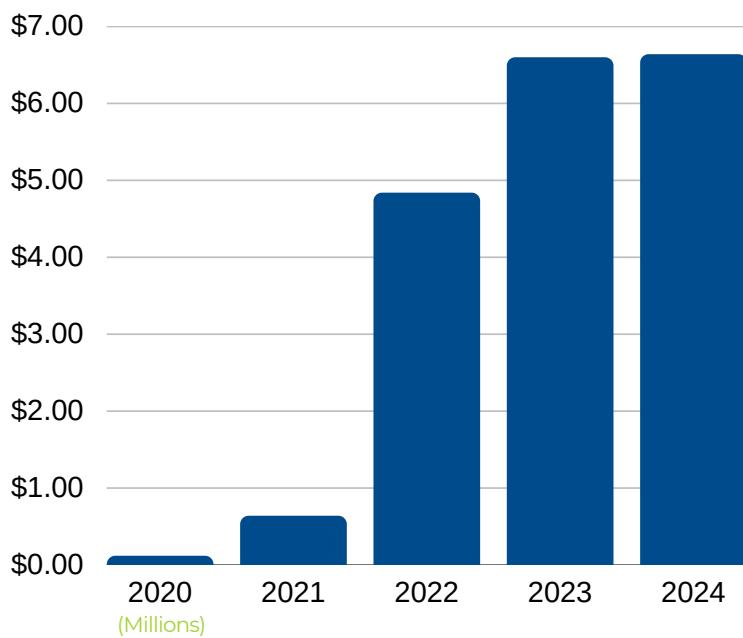
FY: July 1, 2023 - June 30, 2024

2024: % of SC's
MSW
Commodities
Recycled by
Weight



South Carolina Recycling Industry 5-Year Capital Investment (Cumulative)

(Billions)



SC Recycling Industry Snapshot 2020 - 2024

\$6.63 Billion

Capital Investment

4,934

Jobs Created

37

**New/Existing
Businesses**

2024 Capital Investment

SOURCE: 2024 Announced Investments

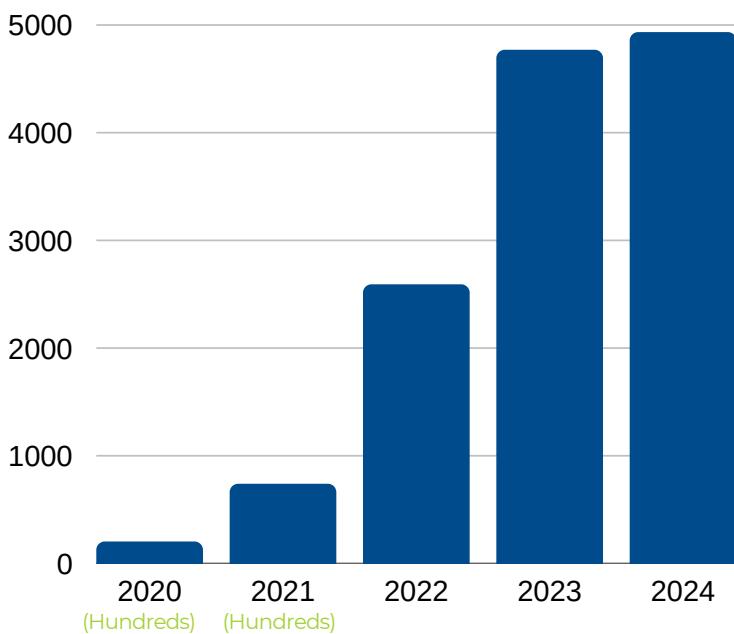
\$45M

Four recycling companies brought jobs to South Carolina with an investment of \$45,750,000.



164
NEW JOBS

South Carolina Recycling Industry 5-Year Job Creation (Cumulative) (Thousands)





RECYCLING MATERIALS Key Takeaways

Paper

The recovered paper market remained strong in 2024. Even with strong market performance, the Georgetown paper mill owned by International Paper announced its closure in October 2024 and shut down by the end of the year. South Carolina's recycling paper market continues to positively impact the state with four paper mills that currently use recovered paper: Greif (Taylors), Smurfit WestRock (Cowpens and Florence), and Sonoco (Hartsville).

Metal

Electric arc furnaces (EAFs) are integral to steel production in South Carolina, offering a more sustainable and energy-efficient alternative to traditional blast furnaces. These furnaces melt scrap steel using electrical energy, significantly reducing carbon emissions and energy consumption. Key EAF facilities in South Carolina include Nucor Steel Darlington and Berkeley plants and the CMC South Carolina Steel plant in Cayce. Liberty Steel in Georgetown has invested in EAF technology to enhance its steel production capabilities, but the mill was idled in 2024.

Plastic

The plastic recycling industry in South Carolina is home to numerous companies that collect and recycle plastic scrap. There are 15 industrial plastic recyclers in the state; additionally, the industry provides a significant number of jobs. In 2024, the Carolina Plastics Recycling Council launched the 'Your Plastic Means Products' roadshow to support this industry. The roadshow highlighted companies in the Carolinas that use recycled plastics and explored strategies to enhance the availability of clean recycled plastic materials.

Glass

Sibelco, a company specializing in mining and processing industrial minerals like silica and clays, has completed the acquisition of glass recycler Strategic Materials Inc. (SMI), which has facilities in Laurinburg, NC, and College Park, GA. In South Carolina, key glass processors include The Upcycling Company and Fisher Recycling. GlassWRX LLC, a Beaufort-based glass recycler, ceased operations in 2024. The state also has several material recovery facilities (MRFs) processing glass, including Sonoco Recycling in Columbia, Horry County Solid Waste Authority, City of North Augusta, and Greenwood County.

Organics

Lexington County, South Carolina issued a bid for a company to oversee the composting operation for the Type I composting facility. The Twin Chimney's Landfill will transfer operations of their Type 2 composting facility to Greenville County. Charleston County and Horry County continue to operate publicly owned SC DES Type 2 composting facilities. Resoil in Elgin, SC continues to operate as a Type 3 facility with the ability to take food waste, raw meats and hemp.

Tires

As the No. 1 state in the country for tire manufacturing, South Carolina is well-positioned to drive the tire recycling industry forward. South Carolina's DES-approved waste tire recycling and processing facilities include Argos Cement, Junk-A-Way Services, New River Tire Recycling, Quality Tire Recycling, Ridge Recyclers, SC Tire Processing, and US Tire Recycling. Whole tires are banned by law from disposal in landfills.



SOUTH CAROLINA

Recycling Infrastructure

4
steel mills

1 aluminum roller

4
textile recyclers

4
compost facilities

4
lithium-ion recyclers

1 carbon fiber recycler

4
tire recyclers

recycled content paper mills 4

15 industrial plastics processors

1 zinc recycler

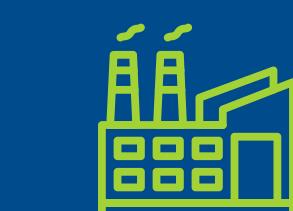
10 PET plastic reclaimers

2
glass recyclers

25,435 direct jobs

more than 300 number of companies

South Carolina's recycling industry continues to grow. Recyclables are collected, processed, and sold to manufacturers to make new recycled-content products.



Recycling Industry Events



Recycling Day at the State House

PALMETTO CLUB (COLUMBIA, SC)

MARCH 19, 2024

The South Carolina legislative event is an opportunity for recycling companies to connect with SC lawmakers. On Tuesday, March 19, 2024, the Carolina Recycling Association, the S.C. Department of Commerce Recycling Market Development, and Sustain SC hosted 43 SC representatives and 64 recycling professionals. Lieutenant Governor Pamela Evette spoke about the environmental impacts and the importance of recycling in South Carolina.



Continental Tire Retread Solutions Center

FORT MILL, SC

MARCH 21, 2024

Staff attended the Continental Retread Solutions Development Center opening on March 21, 2024. The development center will focus on retread process improvements and technology development, with the goal of bringing innovation and up-to-date retread processes to Continental's Retread Solutions Partners and the fleets they serve. Continental also expanded their headquarters campus in Fort Mill, SC. The new three-story, 90,000-square-foot building is designed and constructed to achieve LEED Gold certification.



Scrap Tire Sustainability Coalition Meetings

COLUMBIA, SC

MARCH 26, 2024

The SC Scrap Tire Sustainability Coalition is a collaboration between the SC Department of Commerce, the SC Department of Environmental Services, PalmettoPride, and a group of stakeholders, including tire manufacturers and retailers, tire processors and haulers, as well as local and state governments. In 2024, the coalition met regularly to work together to help South Carolina improve the safe and efficient end-of-life management of scrap tires. These meetings focused on challenges, opportunities for partnerships, funding improvements, emerging technologies, and new markets to drive solutions for sustainable tire management in South Carolina.

Recycling Industry Events



National Plastic Expo (NPE)

ORLANDO, FL
MAY 6-10, 2024

The SC Department of Commerce's Recycling Market Development, International Trade, and Global Business Development teams worked together to host a booth at the National Plastics Expo (NPE). NPE: The Plastics Show is designed for industries worldwide to promote plastics, innovation, and sustainability. The companies that supported the SC Department of Commerce booth included CRC Recycling, ICE Recycling, Mosaic Color & Additives, and USFibers. Over 50,000 people and 2,000 exhibiting companies attended the NPE Plastics Show!



Circularity EV Stakeholder Group

COLUMBIA, SC
MAY 13, 2024

In collaboration with the SC Battery Symposium, the Circularity in EV Stakeholder Group, a collaborative network of organizations, experts, and individuals focused on advancing the principles of circular economy within the electric vehicle (EV) sector, met on May 13, 2024, to kick off a series of meetings. The group brings together stakeholders from various parts of the EV ecosystem—including manufacturers, automotive dismantlers, battery recycling processors, universities, and fire safety specialists—to drive the adoption of circular practices in the design, production, use, and end-of-life management of electric vehicles.



Carolina Plastics Recycling Council Roadshow

MILLIKEN & COMPANY (SPARTANBURG, SC)
MAY 29, 2024

In 2024, the Carolina Plastics Recycling Council (CPRC) launched the 'Your Plastic Means Products' roadshow to support the plastic recycling industry in South and North Carolina. The roadshow featured a four-part educational series that highlighted companies making the coolest products from recycled plastics and explored strategies to increase clean recycled plastic materials. The stops on the roadshow included Atlantic Packaging (NC), Milliken & Company (SC), Southeastern Container (NC), and Alpek Polyester (SC). The event engaged recycling leaders, local businesses, partners, and associates across the global plastic recycling value chain.

Recycling Industry Events



RMDAC: United Catalyst Corporation

FOUNTAIN INN, SC

JULY 24, 2024

In July 2024, RMDAC visited United Catalyst Corporation (UCC), a processor of scrap catalytic converters that offered global refining services. UCC is releasing a digital tool that will allow catalytic converter sellers to understand the value of their converters prior to the sale. This tool also has value in tracking stolen convertors that can support the prosecution of crimes related to the theft of catalytic converters.



RMDAC: Horry County Solid Waste Authority

CONWAY, SC

SEPTEMBER 19, 2024

Horry County Solid Waste Authority warmly welcomed the Recycling Market Development Advisory Council (RMDAC) on Thursday, Sept. 19, 2024. The council toured the Horry County Material Recovery Facility (MRF) and discussed action plans in three key areas: amplifying the recycling message, managing batteries, and addressing waste tires. RMDAC works to support the economic growth of South Carolina's recycling industry by building recycling markets, increasing material recovery, and promoting the recycling value chain.



Sustainability Matchmaker Event

COLUMBIA, SC

OCTOBER 23, 2024

The South Carolina Department of Commerce Supplier and Recycling teams in partnership with Sustain SC hosted the second annual Sustainability B2B Supplier Matchmaker event on Oct. 23, 2024, at Central Energy, Columbia, S.C. Attendees were pre-screened based on their sustainability goals and needs. Suppliers and buyers were matched based on their specific sustainability requirements, such as eco-friendly packaging, renewable energy solutions, and waste reduction services.

CAMPAIGN CORNER



SC RECYCLING MARKETS DIRECTORY

Connecting Materials to Markets
www.recyclinginsc.com/directory

The South Carolina Recycling Market Development team offers a free online tool called the SC Recycling Markets Directory.

Connects more than 300 SC recycling companies



Allows businesses to find recyclers in their area



Helps companies meet sustainability goals

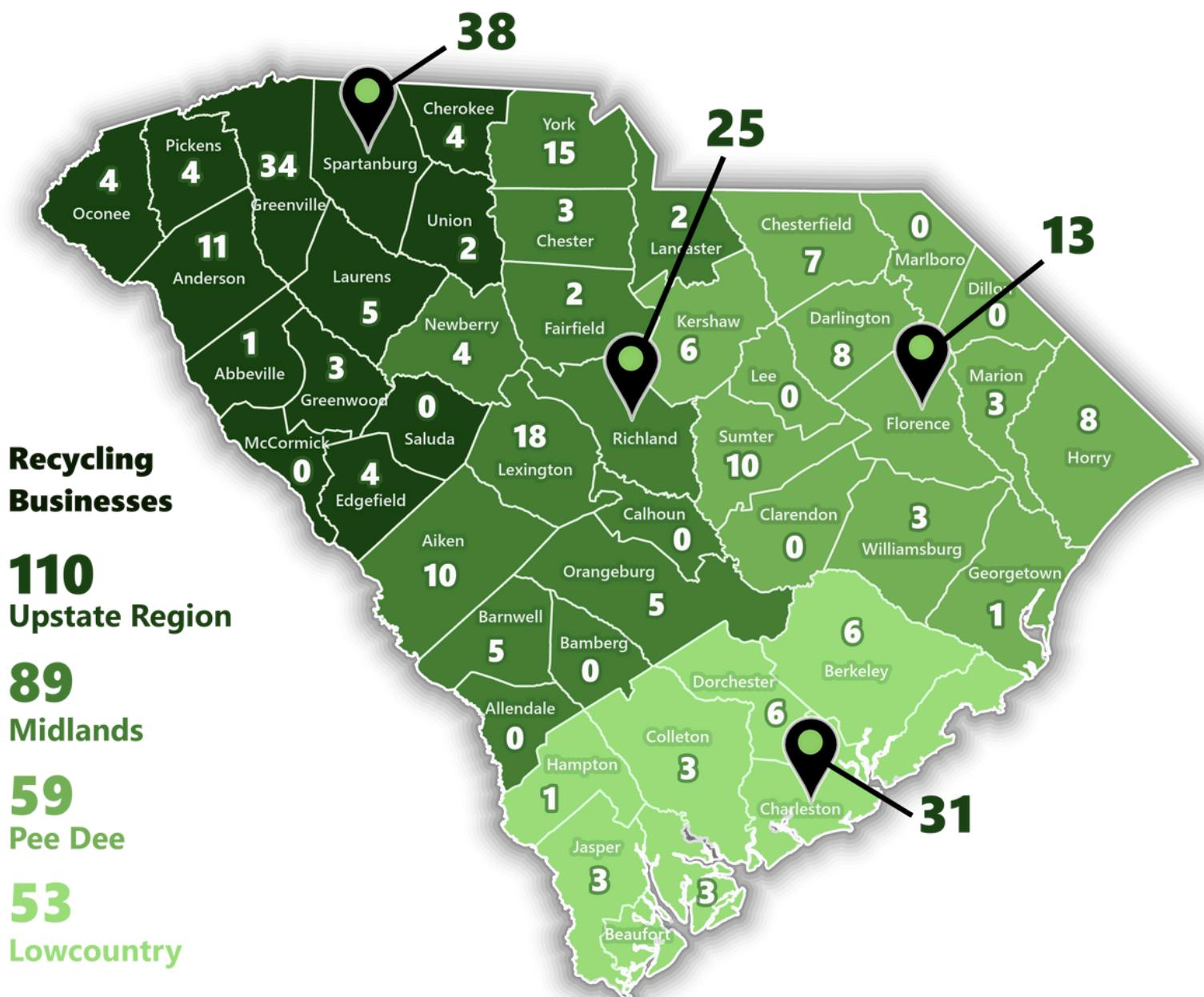
SC MATERIAL EXCHANGE

This free online service is designed to help businesses, industries, and other organizations.

SC MATERIAL EXCHANGE

- » Assists with finding markets for traditionally discarded material.
- » Provides advertising listings for both wanted and available material.
- » Offers posts and listing items by type, quantity, availability, and geographic location.

Recyclers by Region & County



Recycling Business: A type of business that earns an income from the collection of variety of materials for recycle.

2024 Recycling Businesses by County

1	Abbeville County	3	Greenwood County
10	Aiken County	1	Hampton County
0	Allendale County	8	Horry County
11	Anderson County	3	Jasper County
0	Bamberg County	6	Kershaw County
5	Barnwell County	2	Lancaster County
3	Beaufort County	5	Laurens County
6	Berkeley County	0	Lee County
0	Calhoun County	18	Lexington County
31	Charleston County	3	Marion County
4	Cherokee County	0	Marlboro County
3	Chester County	0	McCormick County
7	Chesterfield County	4	Newberry County
0	Clarendon County	4	Oconee County
3	Colleton County	5	Orangeburg County
8	Darlington County	4	Pickens County
0	Dillon County	25	Richland County
6	Dorchester County	0	Saluda County
4	Edgefield County	38	Spartanburg County
2	Fairfield County	10	Sumter County
13	Florence County	2	Union County
1	Georgetown County	3	Williamsburg County
34	Greenville County	15	York County



RECYCLING MARKET DEVELOPMENT ADVISORY COUNCIL

RMDAC will keep advancing recovery, recycling, and sustainable material management solutions for items such as carpet, glass, plastic containers, metals, scrap tires, electronics, lithium-ion batteries, textiles, construction and demolition materials, organics, and universal wastes that can be recycled/repurposed.



State agency responsible for economic development in SC. The Recycling Market Development team builds recycling markets, increases material recovery and promotes the recycling value chain.

1201 Main Street Suite 1600
Columbia, South Carolina 29201
(803) 737-0400
www.SCcommerce.com
www.RecyclinginSC.com



State agency that is committed to preserving South Carolina's air, land, water, and coast through Science, Service, and Sustainability. The Office of Solid Waste Reduction and Recycling provides support to local governments and is non-regulatory in nature.

2600 Bull Street
Columbia, SC 29201
1-800-768-7348
www.Des.Sc.gov
www.Des.Sc.gov/Community/Recycling-Waste-Reduction



SC DEPARTMENT of
**ENVIRONMENTAL
SERVICES**



The South Carolina Department of Commerce Recycling Market Development Advisory Council 2024 Annual Report is submitted by the SC Department of Commerce in compliance with SECTION 13-1-380 of the SC Code of Laws. This report was published by Recycling Market Development staff at the SC Department of Commerce on March 15, 2025.