



Henry McMaster
Governor

SOUTH CAROLINA
DEPARTMENT OF COMMERCE

Harry M. Lightsey III
Secretary

Recycling Market Development Advisory Council (RMDAC) Retreat
Thursday, September 25, 2025
8:30 AM – 2:00 PM

RMDAC

Tina Green, Mumford Industries
Adam Padget, Green Energy Biofuels
Kevin Richardson, City of Rock Hill
Morgan Crapps, Redwood Materials
Norman Chandler, Republic Services
Becky Berube, United Catalyst Corporation
Jean Cecil Frick, NP Strategy
Angel Lara, Mid-Carolina Steel
Carol James-Gilchrist, Sonoco Recycling
Ed Marr, Horry County
Chris Fisher, Fisher Recycling

ABSENT

Brad Dutton, Dutton Polymers
Andy Spicer, University of South Carolina
Jay Spears, Continental Tire

GUESTS

Glenn Odom, Retired; Emeritus Member
Carolyn Queenan, University of South Carolina
Kealy Carter, University of South Carolina
Sarah Carroll, University of South Carolina

STAFF

Anna DeLage, SC Department of Commerce
Shelby McIntyre, SC Department of Commerce
Joe Henshaw, SC Department of Commerce

CALL MEETING TO ORDER

Tina Green (Chair) motions to call the meeting to order at 9:00 AM.



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MINUTES

The May meeting minutes were approved.

INTRODUCTION

Anna DeLage outlined the future goals of RMDAC and explained the primary goals of the Retreat.

MARKET UPDATES

Each board member gave brief updates on the current state of their respective markets.

- Disposal: They're having capacity discussions at the state level.
- Paper: Activity is relatively flat, and businesses are generating less across the board.
- Biodiesel: They're currently at a 2-3 year high but are starting to see a dip due to tariffs.
- Plastic: Supply and demand are meeting each other, but supply has been reducing each month. They are not optimistic for the end of the year.
- Copper: Strong market, even with the tariffs.
- Aluminum: Price has been steadily rising for months and have been heavily impacted by tariffs.
 - Canada is importing 20% less
 - The United States doesn't have enough domestic production yet.
- Critical minerals: The administration has been focused on critical minerals – specifically, how they impact us from a national security standpoint.
 - Timing is good for the industry to make a meaningful contribution.
 - Domestic market is finally gaining ground on what Asia has been doing for years.
- Glass: Volumes are stable. The housing market recently dropped, but raised back up.
- Municipality: York County stopped their curbside recycling program, so residents now have to drop off their recycling at sites. This has led to a decline in volume.

LAUNCH TO LEGACY RECYCLING VIDEO

Anna Delage played the Launch to Legacy recycling video created by SCDOC's MarComms team, then opened the floor to discussion and feedback about the video. This was used in the last week of the ambassador's social campaign in Spring 2025 to incorporate new branding.



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- Reactions & Feedback:
 - Feels like a PSA, could be used by local governments.
 - Video was created as a call to action to guide businesses to recycling resources and share the impact of recycling.
- Ideas & Suggestions:
 - Highlight how South Carolina's current businesses are contributing to recycling, focus on innovation.
 - Swap out residential focus for business clips if that is the direction the agency is headed.
 - Incorporate industry material transformation story into the video to show the "legacy" theme of Launch to Legacy.
 - Make the video feel more welcoming to companies that are considering locating in South Carolina.
 - The video should take on a more European look, since most of the companies' decision-makers are from Europe.

THE RECYCLING GAME PLAN

Anna Delage presented a slide deck that outlined the Mission and Vision of Launch to Legacy, and how it encompasses the recycling industry.

- Mission: Create economic opportunities to increase choices.
- Vision: Embrace the future to ensure South Carolina's sustainable advantage.
- Launch to Legacy is built around the idea of helping businesses wherever they are in their lifecycle.
- "The Big 3":
 - (1) Navigating business resources
 - (2) Engaging stakeholders and partners
 - (3) Supporting statutory requirements
- There will be multiple changes coming to the RMDAC Board.
 - The annual report will be streamlined by shifting it to a dashboard and including what is required in statute.
 - The SC Dept. Of Environmental Services will focus on supporting local governments so that the recycling team at Commerce can better focus on supporting business and industry.
 - Staff will serve as administrative support of the board while RMDAC members drive meeting structure and outcomes.



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- Instead of hosting tours as a part of RMDAC meetings, staff will focus on amplifying outcomes in between meetings through industry roundtables and invite the board as needed. There is potential for collocating events and board meetings with the purpose of engaging a wider audience.

BUILDING A WORKING BOARD

Anna DeLage discussed the original purpose of RMDAC, then asked the Board Members to consider RMDAC's future legacy and success.

- RMDAC was originally created to assist in developing recycling markets, but it's now difficult to create *new* markets in an uncertain market economy. How do you shift to meet needs of the marketplace.
 - RMDAC needs to refocus to guiding companies to recycling resources.
- Board Members recommended that RMDAC needs to create clarity around the goal and work to excel in that role – no matter the commodity or industry. Chair and Vice Chair will follow up on next step and present a plan at the next meeting.
- Suggestions:
 - Review Bylaws.
 - Focus on critical minerals and national security.
 - Focus on common core of materials that have a market with a goal of guiding businesses to recycling resources.
 - Focus RMDAC's energy on saving the timber industry. It's South Carolina's second-largest industry and encompasses lots of jobs and materials. What are new markets that can come out of this material.
 - Understand the role of working with and communicate more with county officials with this new business and industry focus.
 - Spend more time discussing the respective industries of Board Members at meetings/retreats.

CENTER FOR SUSTAINABLE GROWTH PRESENTATIONS

Dr. Carrie Queenan gave a presentation on circular supply chains in South Carolina.

- She conducted research on the consumer products circular supply chain, specifically PET recycling and how South Carolina compares to nearby states.
- The research indicates that the greatest loss in the circular supply chain is the interchange of consumers to recyclers – consumers are not recycling enough material.
- Solutions need to include a combination of better recycling access for consumers and increased capacity for recyclers.



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- Policies need to encourage consumers to recycle, since there is little to no incentive to recycle right now.

Dr. Kealy Carter gave a presentation on the Center for Sustainable Growth at the University of South Carolina.

- The Center for Sustainable Growth has re-opened and is currently fundraising (their goal is \$20 million).
- Their funding consists of endowments, grants, and donations.
- They are focused on three key areas:
 - (1) Curriculum: research, developing sustainability-focused educational programs (undergraduate, graduate, and corporate training).
 - (2) Real-world solutions for companies.
 - (3) Engagement: conferences, trade shows, accelerators, and community outreach.

Dr. Sarah Carroll gave a presentation about Extended Producer Responsibility.

- Her research focused on the economic impacts of South Carolina's decision to adopt or not adopt Extended Producer Responsibility (EPR) policies, as well as the impacts if other states adopted these policies.
 - Dr. Carroll used data sets from the US Census, BEA, Implan, PSI, and a local Waste Industry Data Pack
- EPR policies mandate corporate responsibility to create a sustainable product, and non-compliance can lead to fines/product bans.
- Generally, funds generated from EPR policies can be reinvested into the circular supply chain, which increases access and capacity.
- These policies can impact decisions on whether to do business in or relocate to South Carolina.
- Critics of EPR are concerned about the public response to mandating behavior, sweeping regulations impacting certain products more than others, and the likelihood of companies leaving or not doing business in South Carolina.

Adjourn: 1:55 PM