

# Section 3

## ALTERNATIVE SOLID WASTE MANAGEMENT FACILITIES

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### 3.1 Introduction

Beck and the Authority have compiled information on alternative solid waste management facilities located within a reasonable hauling distance of the County. This information was developed for two principal reasons:

1. To identify alternative means of disposal which could potentially be available to the County as a long-haul disposal site upon expiration of the current waste disposal agreement with Waste Management.
2. To identify potential sources of competition to the County both during the period 2006 through 2011 and during the period 2012 through 2031. The County could be financially impacted by the loss of solid waste generated within the County to competing disposal facilities. It will be important for the County to understand what level of competitive tipping fee it could reasonably expect to charge and still have solid waste delivered to the County's System.

### 3.2 Discussion of Review

For the purpose of compiling the list of alternative solid waste management facilities, Beck and the Authority gave consideration to the following criteria:

1. Estimated average driving distance from the County to the disposal facility.
2. Size of the facility, expressed in tons per day.
3. Reported remaining useful life.
4. Willingness of the facility owner to accept solid waste generated outside the geographic jurisdiction.
5. Reported gate rate.

In terms of considering the driving distance, Beck used the following planning assumptions:

1. Distances up to 25 to 30 miles could be direct hauled by collection vehicles collecting solid waste generated within the County.
2. Distances greater than 25 to 30 miles are assumed to require a transfer station and the use of transfer vehicles.

## ALTERNATIVE SOLID WASTE MANAGEMENT FACILITIES

Based upon our knowledge of solid waste flow, it is reasonable to expect that solid waste may be transported from the jurisdiction to alternative disposal facilities located both within and out side the Market Area depending on the tipping fees being charged and the cost of transfer and transportation. In developing the list of facilities presented herein, we have: (1) reviewed published information; and (2) relied upon our research data bases we previously developed in compiling a list of alternative disposal facilities. The published information we reviewed was received from Maryland Department of Environment (“MDE”), Pennsylvania Department of Environmental Protection (“PADEP”), and Virginia Department of Environmental Quality (“VADEQ”).

It is important to note that the ability of private haulers to utilize any of the disposal facilities discussed below will be dependent upon the haulers’ ability to have access to a transfer station because the distances to almost all the disposal facilities is too great to economically use a collection vehicle to haul the waste from the County to the disposal site. Therefore, privately-owned transfer stations in and around the County will represent the main source of competition to the County. The tipping fee that will be charged at those transfer stations will depend upon the tipping fee being charged at out-of-state disposal facilities, the distance to such facilities and the cost of fuel oil.

### Maryland

Table 3-1 below highlights all transfer stations in Maryland in addition to selected waste-to-energy facilities and landfills located within the state.

**Table 3-1  
Alternative Solid Waste Management Facilities in Maryland**

Facility Type	Facility Name	Location	Type of Ownership	Daily Disposal Capacity (TPD)	Useful Remaining Life (Years)	Current Tipping Fee <sup>(1)</sup> (\$)	Accept Out Side Waste	Estimated Distance (Miles)
WTE	BRESCO	Baltimore City	Private	2,250	IND	37-67.50	Yes	35
WTE	Harford County	Joppa, Harford County	Public	360	IND	48.00	No	49
WTE	Montgomery County	Dickerson, Montgomery County	Public	>1,000	IND	N/A	No	47
LF	Alpha Ridge	Howard County	Public	N/A	N/A	60.00	No	33
LF	Appeal	Lusby, Calvert County	Public	<100	N/A	52.00	No	101
LF	Brown Station Road	Upper Marlboro, Prince George County	Public	>1,000	6	49.00	No	65
LF	Cecil County	Elkton, Cecil County	Public	N/A	N/A	N/A	N/A	82
LF	Charles County	Waldorf, Charles County	Public	300	30	65.00	No	90
LF	Eastern	White Marsh, Baltimore County	Public	1,000	N/A	80.00	No	41
LF	Millersville	Severn, Anne Arundel County	Public	300	50	65.00	No	42

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**Table 3-1  
Alternative Solid Waste Management Facilities in Maryland**

Facility Type	Facility Name	Location	Type of Ownership	Daily Disposal Capacity (TPD)	Useful Remaining Life (Years)	Current Tipping Fee <sup>(1)</sup> (\$)	Accept Out Side Waste	Estimated Distance (Miles)
LF	Northern	Westminster, Carroll County	Public	360	50	54.00	No	5
LF	Quarantine Road	Baltimore City	Public	N/A	N/A	67.50	Yes	35
TS	Annapolis Junction	Annapolis, Anne Arundel County	Private	N/A	IND	33-60	Yes	58
TS	Appeal	Lusby, Calvert County	Private	N/A	IND	N/A	N/A	101
TS	Eastern	White Marsh, Baltimore County	Public	N/A	IND	80.00	No	41
TS	Northern	Carroll County	Public	N/A	IND	54.00	No	5
TS	Northwest	Baltimore City	Public	N/A	IND	N/A	No	35
TS	Shady Grove	Montgomery County	Public	N/A	IND	52.00	No	47
TS	Stemmers Run	Cecil County	Public	N/A	IND	N/A	N/A	82
TS	Talbot	Talbot County	Private	N/A	IND	N/A	N/A	91
TS	Western	Baltimore County	Public	N/A	IND	N/A	No	31
TS	Woodlawn	Cecil County	Public	N/A	IND	N/A	N/A	82
TS	Worcester	Ocean City, Worcester County	Public	N/A	IND	N/A	N/A	167

WTE=waste-to-energy facility

LF=landfill

TS=transfer station

N/A=information not available or not applicable

IND=indefinite

(1) Based on "reported" gate prices; lower rates are likely to be available depending on the contract terms, waste quantities, and the relationship between the hauler and the owner of the disposal facility. All tipping fees per ton.

The information in Table 3-1 indicates that there is very limited privately-owned disposal capacity available in Maryland. The nine landfills in Maryland are all publicly-owned and at least six of those landfills are reported to not accept solid waste generated outside their jurisdiction. Similarly, of the three waste-to-energy facilities, only the facility in Baltimore is reported to accept solid waste generated outside the County of Baltimore.

Most of the transfer stations in Maryland are located too far from the County to represent an economical alternative to private haulers. The two transfer stations in Baltimore County are the only transfer stations estimated to have a transportation distance of less than 40 miles. Based on this information, we are of the opinion that because there is limited disposal capacity available in Maryland, the current disposal facilities located in Maryland will represent neither an opportunity for nor a source of competition to the County.

# ALTERNATIVE SOLID WASTE MANAGEMENT FACILITIES

## Pennsylvania

Table 3-2 includes a selected list of waste-to-energy facilities and landfills in Pennsylvania with a list of transfer stations in Cumberland, York, and Franklin counties. These counties, along with Adams and Fulton counties, were selected due to their proximity to Carroll County.

**Table 3-2**  
**Alternative Solid Waste Management Facilities in Pennsylvania**

Facility Type	Facility Name	Location	Type of Ownership	Daily Disposal Capacity (TPD)	Useful Remaining Life (Years)	Current Tipping Fee <sup>(1)</sup> (\$)	Accept Out Side Waste	Estimated Distance (Miles)
WTE	Montenay Montgomery LLP	Conshohocken, Montgomery County	Private	2,520	IND	48.00	N/A	131
WTE	Wheelabrator Falls	Morrisville, Bucks County	Private	2,800	IND	56.00	N/A	165
LF	Alliance	Taylor, Lackawanna County	Private	5,000	N/A	N/A	N/A	181
LF	Conestoga	New Morgan, Berks County	Private	7,210	N/A	50.00 (35-50)	No	117
LF	Frey Farms	Adamstown, Lancaster County	Public	1,500	N/A	N/A	No	105
LF	G.R.O.W.S.	Morrisville, Bucks County	Private	10,000	N/A	65.00 (40-56)	N/A	131
LF	Grand Central	Pen Argyl, Northampton County	Private	2,750	N/A	N/A	N/A	169
LF	Keystone	Dunmore, Lackawanna County	Private	5,000	20	(47.25)	Yes	185
LF	Lake View	Erie, Erie County	Private	4,600	N/A	N/A	N/A	354
LF	Lanchester	Honey Brook, Chester County	Public	1,650	N/A	N/A	No	110
LF	Modern	York, York County	Private	4,667	10(1)	60.00 (35-45)	Yes	37
LF	Mountain View	Greencastle, Harris County	Private	1,500	N/A	(50)	N/A	45
LF	Pioneer Crossing	Birdsboro, Berks County	Private	1,000	20	100.00 (40-50)	Yes	123
LF	Pottstown	Pottstown, Montgomery County	Private	5,333	N/A	65.00	N/A	132
LF	Rolling Hills	Boyertown, Berks County	Public	3,200	N/A	57.00 (40)	No	138
LF	Sandy Run	Hopewell, Bedford County	Public	300	N/A	N/A	No	130
LF	SECCRA	West Grove, Chester County	Private	375	N/A	47.00	No	95
LF	Shade	Cairnbrook, Somerset County	Private	2,900	15 <sup>(2)</sup>	N/A	Yes	154
LF	Tullytown	Tullytown, Bucks County	Private	8,333	N/A	65.00 (40-56)	N/A	162
TS	Diller	Enola, Cumberland County	N/A	N/A	IND	N/A	N/A	61

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**Table 3-2  
Alternative Solid Waste Management Facilities in Pennsylvania**

Facility Type	Facility Name	Location	Type of Ownership	Daily Disposal Capacity (TPD)	Useful Remaining Life (Years)	Current Tipping Fee <sup>(1)</sup> (\$)	Accept Out Side Waste	Estimated Distance (Miles)
TS	Hanover	Hanover, York County	N/A	N/A	IND	N/A	N/A	20
TS	Washington	Waynesboro, Franklin County	N/A	N/A	IND	N/A	N/A	36
TS	WM Camp Hill	Camp Hill, Cumberland County	N/A	N/A	IND	N/A	N/A	57

WTE=waste-to-energy facility

LF=landfill

TS=transfer station

N/A=information not available or not applicable

IND=indefinite

(1) Price within parenthesis includes the expected contractual tipping fee. Based on "reported" gate prices; lower rates are likely to be available depending on the contract terms, waste quantities, and the relationship between the hauler and the owner of the disposal facility. All tipping fees per ton.

(2) Remaining life under permit, have room for expansion.

The information in Table 3-2 indicates that there is a significant amount of privately-owned disposal capacity at landfills in Pennsylvania within a reasonable driving distance for a transfer trailer hauling waste which was delivered to a transfer station. The reported tipping fees range from \$35 to \$65 per ton. However, we anticipate that longer term contracts for significant quantities of waste could be available at tipping fees ranging from \$30 to \$40 per ton, dependent upon their location within Pennsylvania.

Based on our review, we are of the opinion that the landfills in Pennsylvania could represent both a potential opportunity and a potential source of competition to the County. How much of an opportunity or source of competition will be dependent upon whether Pennsylvania: (1) increases the current \$4.00 charge per ton for solid waste being disposed in landfills; and (2) continues the recent policy of not permitting additional landfill disposal capacity in the State.

## Virginia

Table 3-3 presents information regarding a selected list of waste-to-energy facilities and landfills in the state of Virginia. Transfer stations in Virginia which are located more than 30 miles distance from the County are not included in Table 3-3.

# ALTERNATIVE SOLID WASTE MANAGEMENT FACILITIES

**Table 3-3  
Alternative Solid Waste Management Facilities in Virginia**

Facility Type	Facility Name	Location	Type of Ownership	Daily Disposal Capacity <sup>(1)</sup> (TPD)	Useful Remaining Life (Years)	Current Tipping Fee <sup>(2)</sup> (\$)	Accept Out Side Waste	Estimated Distance (Miles)
WTE	Arlington/Alexandria	Arlington, Virginia	Public	1,000	IND	50.00	Yes	70
WTE	Fairfax County Resource Recovery Facility	Lorton, Fairfax County	Public	3,000	IND	48.00	Yes	90
LF	Atlantic	Waverly, Sussex County	Private	8,000	41	40.00	Yes	227
LF	Bethel	Hampton, Hampton County	Private	3,000	48	40.00	Yes	249
LF	Brunswick	Lawrenceville, Brunswick County	Private	3,100	16	40.00	Yes	251
LF	Charles City	Charles City, Charles City County	Private	5,700	24	38.00	Yes	205
LF	Fauquier County	Warrenton, Fauquier County	Public	450	18	36.00	No	93
LF	King & Queen	Little Plymouth, King & Queen County	Private	3,800	14	40.00	Yes	185
LF	King George	King George, King George County	Private	4,700	22	39.00	Yes	124
LF	Loudon County	Leesburg, Loudon County	Public	300	60	55.00	No	57
LF	Maplewood Recycling & Disposal	Amelia Court House, Amelia County	Private	2,000	80	38.00	Yes	214
LF	Middle Peninsula	Glenns, Gloucester County	Private	2,800	60	35.00	Yes	189
LF	Old Dominion	Richmond, Henrico County	Private	2,200	3	50.00	Yes	177
LF	Prince William County	Manassas, Prince William County	Public	>1,200	20	N/A	No	95
LF	Shoosmith	Chester, Chesterfield County	Private	3,200	11	40.00	Yes	195
LF	Stafford County	Stafford, Stafford County	Public	215	26	36.00	No	114

WTE=waste-to-energy facility

LF=landfill

TS=transfer station

N/A=information not available or not applicable

IND=indefinite

(1) Provided via "Solid Waste Price Index (12/04)" State of Virginia files or reported by facility Operator.

(2) Based on "reported" gate prices; lower rates are likely to be available depending on the contract terms, waste quantities, and the relationship between the hauler and the owner of the disposal facility. All tipping fees per ton.

The information in Table 3-3 indicates that there are at least ten very large, privately-owned landfills located in Virginia with a significant number of years of useful remaining life. Further, all of the landfills are located close enough to the County that they could be reached in a single day by a transfer vehicle as the hauling distances range from 95 to 250 miles. The gate rates at the Virginia landfills are reported to range from \$35 to \$55 per ton. However, based on a waste shed study we recently performed, we have been advised that longer-term contract rates of \$20 per

ton are available at certain of the Virginia landfills. Based on our review, we are of the opinion that, assuming transfer station capability is available in or around the County, the Virginia landfills will continue to represent both a potential source of disposal for County waste as well as sources of competition to the County System.