



American
Forest & Paper
Association



www.afandpa.org

RECOVERED PAPER MARKETS UPDATE

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Metropolitan Washington Council of Governments
Recycling Committee
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BETTER PRACTICES
BETTER PLANET **2020**
Continuing AF&PA's Commitment to Sustainability

About AF&PA

- National trade association serves to advance a sustainable U.S. pulp, paper, packaging, and wood products manufacturing industry.
- Member companies make products essential for everyday life from renewable and recyclable resources that sustain the environment.
- AF&PA Works to ensure a continuing, expanding recovered fiber supply by:
 - Raising awareness
 - Educating stakeholders
 - Providing tools and resources

Paper Recycling Infrastructure

- 87% of Americans have access to community paper recycling
- Paper and Paperboard collection:
 - 53% single stream (including glass)
 - 12% single stream (excluding glass)
 - 34% dual stream

Source: R.W. Beck 2010 AF&PA Community Survey

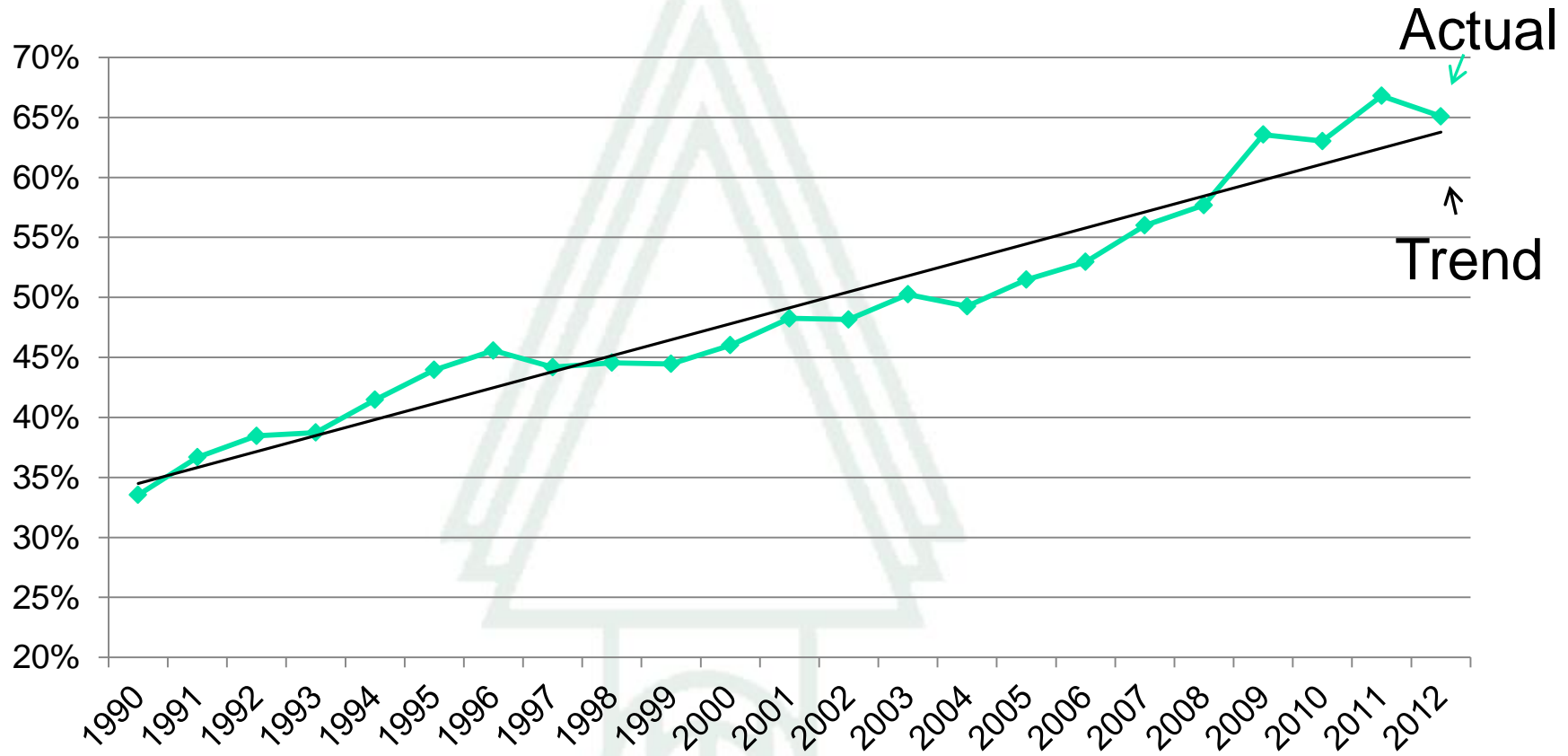
U.S. Recovery of Paper & Paper-Based Packaging

- 2012 Overall: 65.1%
- Second highest recovery rate
- On track to meet *Better Practices Better Planet 2020* goal:
 - Exceed 70% recovery by 2020



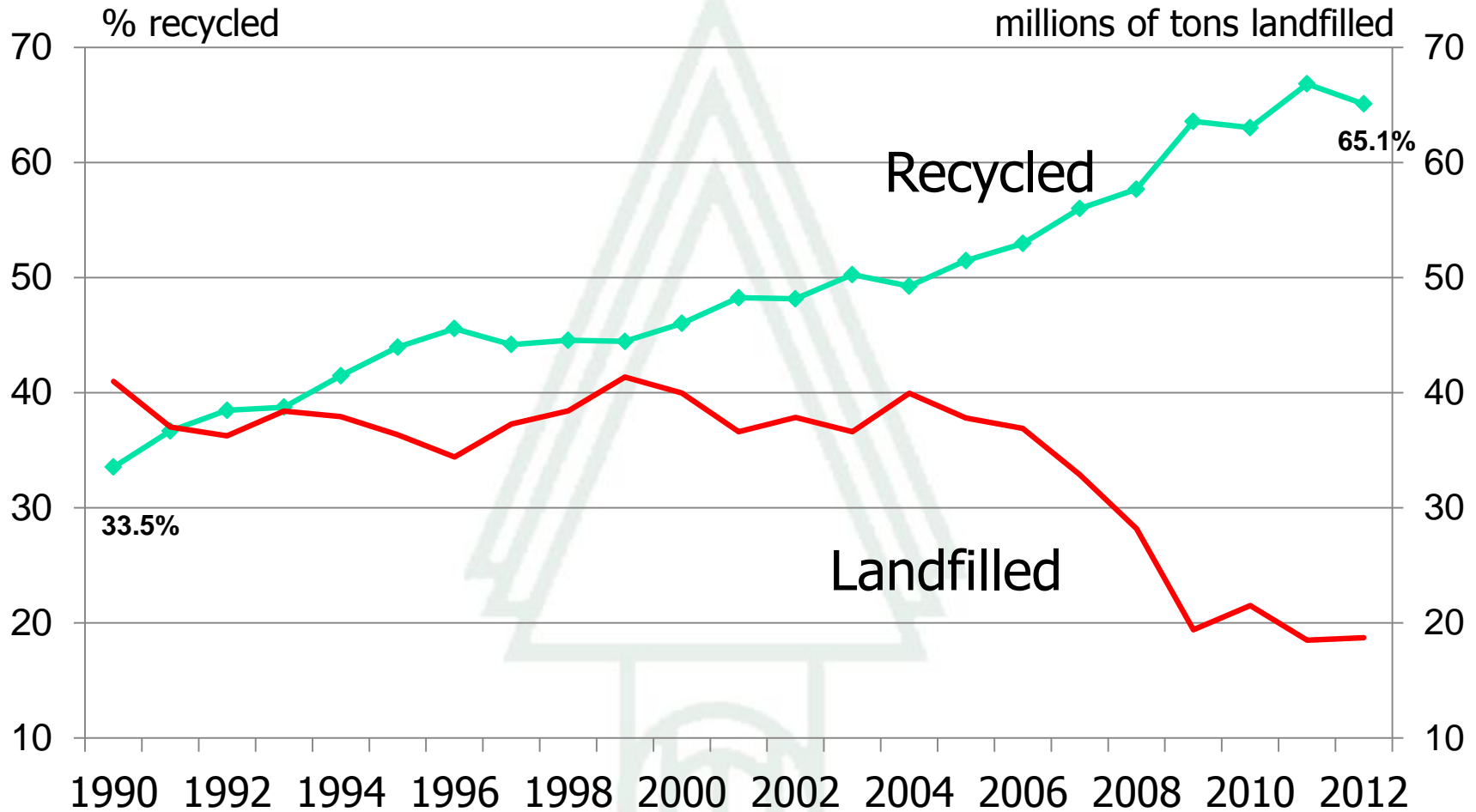
U.S. Recovery of Paper and Paper-Based Packaging

U.S. Paper Recovery Rate 1990-2012



Source: AF&PA

Paper Recovered for Recycling vs. Disposed of in Landfills (1990-2012)

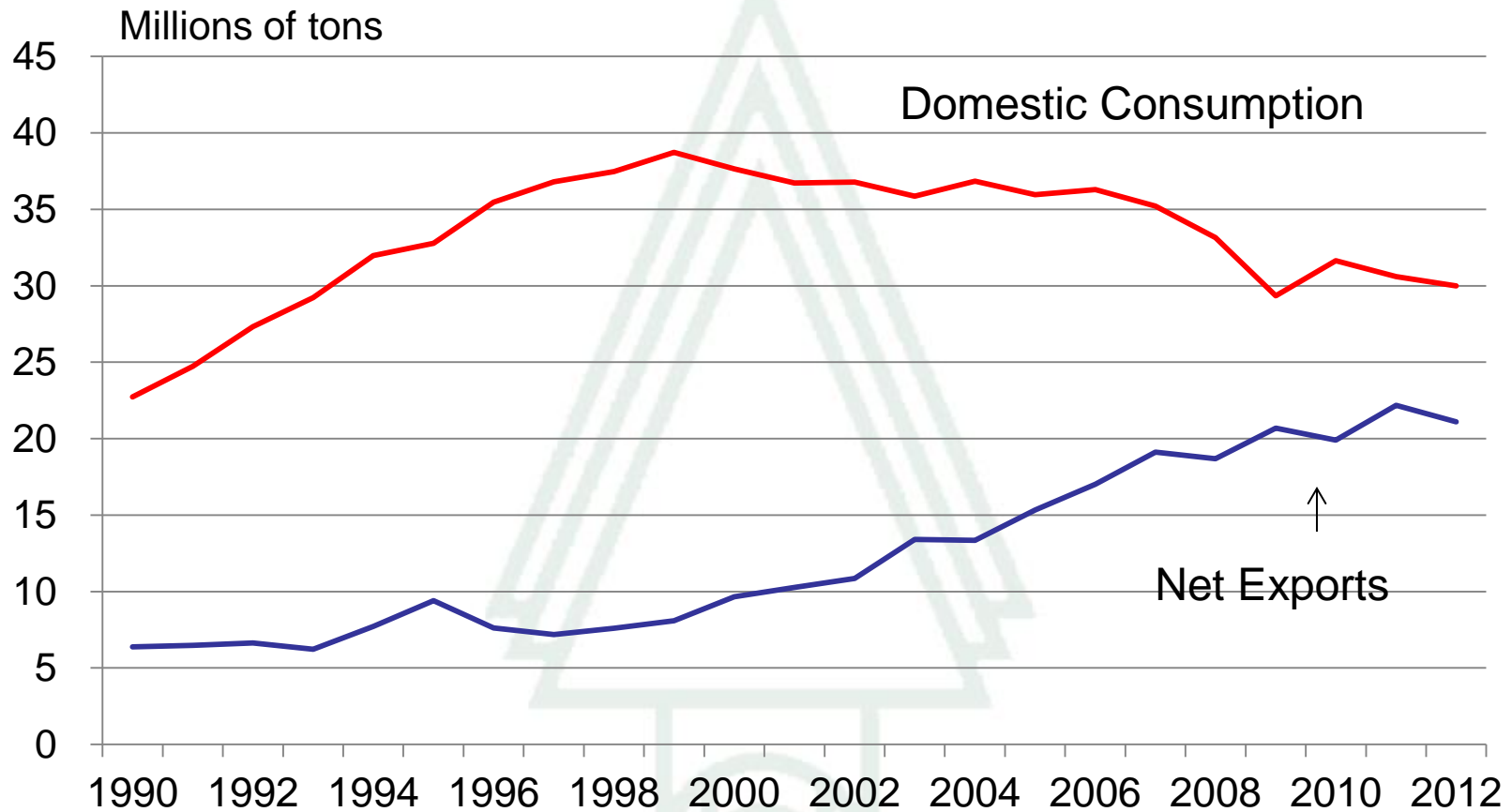


U.S. and Global Economic Outlook

- IMF Projects Growing Global Economy 2014-15
- 2014 Economic Forecast
 - U.S. +2.8%
 - EU - 0.4%
 - China +7.5%
 - Global +3.7%
- 2015 Economic Forecast
 - U.S. +3%
 - EU +1.4%
 - China +7.3%

Source: International Monetary Fund

Recovered Paper Consumption at U.S. Mills



Sources: AF&PA and U.S. Census Bureau

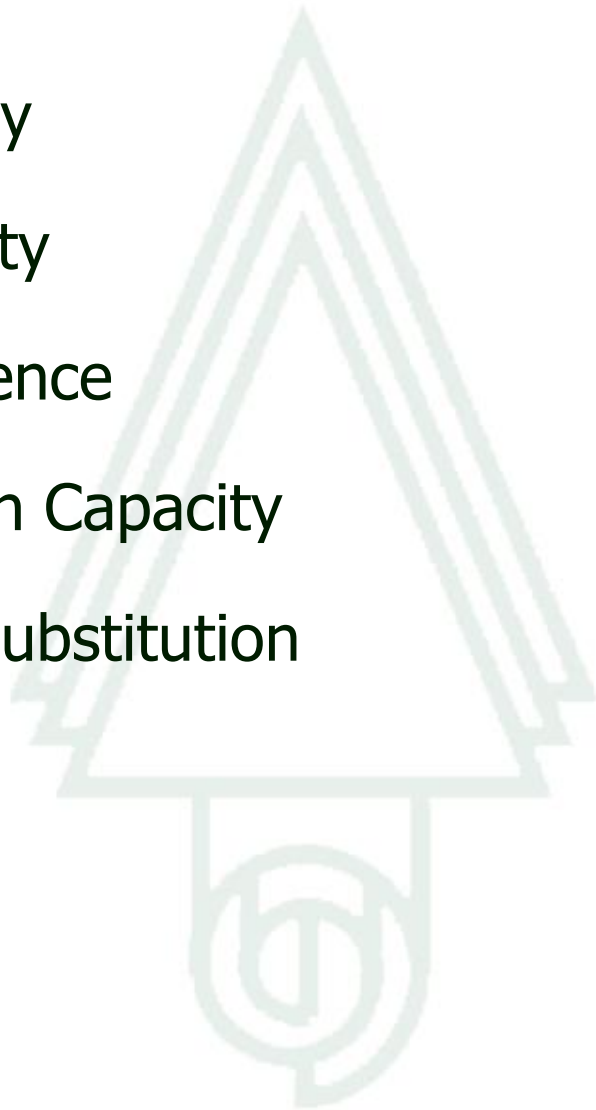
Global Demand for Recovered Paper

- 2013
 - Projected World Demand Increased by <2%
- 2014-15
 - Recovered Paper Demand +2.4%
 - World Paper and Paperboard Output +1.8%
- Global Recovery Rate
 - Projected to Grow to 60% by 2018 (vs. 57% in 2013)
 - Tempered by Lower Demand Growth in both Developed Developing Regions

Source: RISI

Trends Shaping Recovered Paper Markets

- Global Economy
- Focus on Quality
- China Green Fence
- New Production Capacity
- Raw Material Substitution



Promoting Increased Paper Recovery

- Recovery Goal
 - Paper recycling is one of the nation's best success stories
 - Goal: Exceed 70% recovery for recycling by 2020
- Partnerships
 - RecycleMania
 - Kaleidoscope Youth Education
 - RecycleBowl
- Recognition
 - AF&PA Recycling Awards
 - School, Business, Community
- Resources
 - Paperrecycles.org website

Thank You

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