OVERVIEW

Plastic Scrap Pricing
Market Drivers & Influences
Market Forces
New Collection
Conclusions
Market Drivers

- The price of natural gas, petroleum and derivatives
- Available virgin resin production capacity relative to demand
- General economic conditions
- The supply of industrial scrap or off-spec material
- Available recycled resin production capacity relative to demand
Historical Plastic Scrap Price vs Oil
2007 to-date
Better Times Are Coming!
Carbon Emissions of Virgin vs Recycled Plastic

- Short Ton HDPE
- Short Ton LDPE
- Short Ton PET
- Driving a Car for 6 months

Data source: EPA Waste Reduction Model (WARM!)

Moore Recycling Associates Inc.
Recycling Implementation Specialists
Declaration for Solutions on Marine Debris

- Announced at UN/NOAA Marine Debris Conference, March 2011
- Six-point strategy for industry action
- Advocates close cooperation with range of stakeholders to create solutions
- >60 associations from 34 countries
- 185 projects since launch in 2011
<table>
<thead>
<tr>
<th></th>
<th>Direct</th>
<th>Supplier</th>
<th>Induced</th>
<th>Total</th>
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<tbody>
<tr>
<td>Jobs</td>
<td>149,010</td>
<td>171,350</td>
<td>151,227</td>
<td>471,587</td>
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<td>Wages</td>
<td>$11,496,501,800</td>
<td>$11,344,450,100</td>
<td>$7,950,256,600</td>
<td>$30,791,208,500</td>
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<td>Economic Impact</td>
<td>$45,644,002,300</td>
<td>$35,727,836,800</td>
<td>$24,442,618,900</td>
<td>$105,814,458,000</td>
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Market Forces

• Availability and Quality of Supply: Collection
• Adequate Reclamation Capacity: Technology
• Sufficient End Market Demand: Profitable Products
• Investment into the first three: $$$
Like all manufacturing, Plastic Recycling must...

- Enough good raw material
- Attract investment
- Technology
- Profitable products

Recycling: Is a Business: with a social component

Source: Dave Cornell
Investment Issues

Existing reclamation business model is tenuous, limiting access to capital

– Most orders month to month, no long term contracts
– Resin segment has little vested interest
– Lack of clear market signals from Public Sector: no clear public policy on PCR use, thus Converters and Brand Owners have demonstrated inconsistent support
– Supply and Technology issues: Quality and Design for Recyclability
U.S. Postconsumer Plastic Recycling
in millions of pounds

- PET Bottles
- HDPE Bottles
- Non-bottle Rigid
- Film
Non-Bottle Rigid Plastic

U.S. Non-Bottle Rigid Plastic Recovered Year over Year by Resin² (pounds)

- PET
- HDPE
- PP
- LDPE
- PS
- PVC
- Other/Mixed
Reclamation Capacity vs Collection
Find AND USE the Terms & Tools

www.RecycleYourPlastics.org/termsandtools

www.RecycleYourPlastics.org/commodityterms
RecycleMorePlastic.org: Foam PS

Anthracite Recycling
900 Fifth Avenue Scranton, PA 18504 US
570-342-0666
Accept: Clean Food Packaging, Transportation Packaging
Program: Drop off

Please help us keep the map current. If you find a foam polystyrene recycling collection program that differs from the map, send feedback to info@recyclemoreplastic.org.
Film & Bags

United States Map of All Drop-Off Facilities

Legend

- Locations
Conclusions

- Oil prices do not directly predict scrap prices
- Supply & Demand of scrap is the biggest influence
- Supply & Demand are influenced by many global forces: political, social, economic, natural and QUALITY
Resources

PlasticsMarkets.org
Connects Suppliers & Buyers of All Types of Scrap Plastic

PlasticFilmRecycling.org
Educate and Facilitate Film Recycling

RecycleMorePlastic.org
Resources to Grow Recycling of All Types of Plastic

MooreRecycling.org
Publications

PlasticRecycling.org
Association of Plastic Recyclers
Questions?

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