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Table of Contents **2**

List of Tables & Charts **3**

Study Overview **4**

Sample Text, Table & Chart **5**

Sample Profile, Table & Forecast **6**

Order Form & Corporate Use License **7**

About Freedonia, Custom Research, Related Studies, **8**

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General 4
Macroeconomic Outlook 5
Consumer Spending Outlook....8
Construction Industry Outlook.... 11
Manufacturing Outlook.... 15
Motor Vehicle Industry Overview.... 19
Plastic Resin Industry Outlook 22
Plastic Packaging Industry Outlook 25
Solid Waste Management Trends 28
Plastic Recycling Processes/Technology 31
Regulatory & Legislative Environment .. 35
  Container Deposit Laws.... 36
  Municipal Collection Infrastructure ... 37
  Recycled Content Requirements & Incentives 39
  Plastic Bag & Container Regulations.. 41
Private Sector Initiatives & Issues 42
  Labeling & Bale Standards.... 43
  Collection Initiatives.... 45
  Extended Producer Responsibility 48
Recycled Plastic Pricing 49
Historical Market Trends.... 52
Foreign Trade 55
International Activity.... 57

RECYCLED PLASTIC COLLECTION

General 59
Bottles.... 62
  PET.... 63
  HDPE 65
  Other 66
Rigid Plastic & Foam 67
  Packaging.... 69
  Motor Vehicles.... 71
  Other Sources.... 72
Bags & Film 73
Carpet & Fiber 75
Processing, Yield, & Demand.... 77

RECYCLED PLASTIC RESINS

General 81
Polyethylene Terephthalate.... 84
  PET Resin Overview 84
  Recycled PET Collection & Demand.... 85
  Markets 88
  Producers.... 91
High Density Polyethylene.... 93
  HDPE Resin Overview.... 93
  Recycled HDPE Collection & Demand . 94
  Markets 97
  Producers.... 100
Low Density Polyethylene.... 100
  LDPE/LLDPE Resin Overview.... 100
  Recycled LDPE Collection/Demand .. 102
  Markets & Producers 104
Polypropylene.... 106
  Polypropylene Resin Overview 106
  Recycled Polypropylene Collection & Demand 108
  Markets & Producers 111
Nylon.... 114
  Nylon Resin & Fiber Overview.... 114
  Recycled Nylon Collection/Markets.. 116
Polystyrene 119
  Polystyrene Resin Overview.... 119
  Recycled Polystyrene Collection & Markets.... 121
Other Resins.... 124

RECYCLED PLASTIC MARKETS

General 128
Packaging.... 130
  Bottles.... 131
  Containers 134
  Bags & Film 136
  Strapping.... 138
  Other Packaging.... 140
Construction 142
  Carpets & Rugs 144
  Lumber.... 147
  Pipe.... 150
  Furnishings 152
  Other Construction 153
Motor Vehicles.... 155
  Batteries 157
  Other Motor Vehicle.... 158
Other Markets.... 160

INDUSTRY STRUCTURE

General 164
Industry Composition 164
Market Share 168
Merger & Acquisition Activity.... 171
Marketing & Distribution.... 173
Competitive Strategies.... 175
Cooperative Agreements.... 176

COMPANY PROFILES

Advanced Environmental Recycling Technologies 181
Berkshire Hathaway.... 184
BioCor LLC 186
CarbonLite Industries 187
The Coca-Cola Company 189
Coll Materials 191
Custom Polymers.... 193
Dart Container.... 194
Entropex.... 198
Envision Plastics Industries 199
Fresh Pak.... 200
Hilex Poly Company.... 201
Illinois Tool Works.... 203
KW Plastics 205
Marglen Industries 207
Mohawk Industries 208
MRC Polymers.... 209
NextLife Recycling.... 210
Omni Resource Recovery 213
Parallel Products of Kentucky 214
PARC Corporation 215
Peninsula Plastics Recycling 216
PET Processors.... 217
Phoenix Technologies International ... 218
Plastic Revolutions.... 220
Plastipak Holdings 221
Polychem Corporation 222
PolyQuest Incorporated.... 223
Reynolds Group.... 225
Schupan & Sons.... 227
Trex Company.... 228
Wellman Plastics Recycling.... 229
wTe Corporation.... 230
Additional Companies Mentioned in Study 232

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List of Tables

EXECUTIVE SUMMARY

1 Summary Table.............................3

MARKET ENVIRONMENT

1 Macroeconomic Indicators 8
2 Personal Consumption Expenditures 11
3 Construction Indicators................ 15
4 Manufacturers' Shipments 18
5 Motor Vehicle Indicators............... 22
6 Plastic Resin Supply & Demand...... 25
7 Plastic Packaging Indicators 28
8 Municipal Solid Waste Management by Process............. 31
9 Recycled Plastic Prices 51
10 Recycled Plastic Market, 2001-2011 54
11 Recycled Plastic Trade.................. 57

RECYCLED PLASTIC COLLECTION

1 Recycled Plastic Collection by Source............................... 61
2 Plastic Bottle Collection for Recycling 63
3 Rigid Plastic & Foam Collection for Recycling............. 69
4 Plastic Bag & Film Collection for Recycling 75
5 Carpet & Fiber Plastic Collection for Recycling............. 77
6 Recycled Plastic Processing & Demand 79

RECYCLED PLASTIC RESINS

1 Recycled Plastic Demand by Resin.. 82
2 Polyethylene Terephthalate Supply & Demand 85
3 Recycled PET Collection & Demand. 87
4 Recycled PET Demand by Market 91
5 High Density Polyethylene Supply & Demand 94
6 Recycled HDPE Collection & Demand 97
7 Recycled HDPE Demand by Market.. 99
8 Low Density Polyethylene Supply & Demand 102
9 Recycled LDPE/LLDPE Collection & Demand 104
10 Recycled LDPE/LLDPE Demand by Market.................. 106
11 Polypropylene Supply & Demand .. 108
12 Recycled Polypropylene Collection & Demand 111
13 Recycled Polypropylene Demand by Market.................. 114
14 Nylon Resin & Fiber Supply & Demand 116
15 Recycled Nylon Collection & Demand 119
16 Polystyrene Supply & Demand 121
17 Recycled Polystyrene Collection & Demand 124
18 Other Recycled Plastic Collection & Demand 127

RECYCLED PLASTIC MARKETS

1 Recycled Plastic Demand by Market.................. 129
2 Packaging Markets for Recycled Plastic 131
3 Bottle Demand for Recycled Plastic by Segment & Resin................ 134
4 Container Demand for Recycled Plastic by Resin......... 136
5 Bag & Film Demand for Recycled Plastic by Resin......... 138
6 Strapping Demand for Recycled Plastic by Resin......... 140
7 Other Packaging Demand for Recycled Plastic by Resin......... 142
8 Construction Product Markets for Recycled Plastic 144
9 Carpet & Rug Demand for Recycled Plastic by Resin......... 147
10 Lumber Demand for Recycled Plastic by Resin......... 150
11 Pipe Demand for Recycled Plastic by Resin 152
12 Furnishings Demand for Recycled Plastic by Resin......... 153
13 Other Construction Demand for Recycled Plastic by Resin......... 155
14 Motor Vehicle Markets for Recycled Plastic 156
15 Motor Vehicle Battery Demand for Recycled Plastic 158
16 Other Motor Vehicle Demand for Recycled Plastic by Resin......... 160
17 Other Markets for Recycled Plastic by Segment & Resin................ 163

INDUSTRY STRUCTURE

1 US Recycled Plastic Sales by Company, 2011 167
2 Selected Acquisitions & Divestitures........................ 172
3 Selected Cooperative Agreements. 178

List of Charts

MARKET ENVIRONMENT

1 Plastic Recycling Process Flowchart 34
2 Recycled & Plastic Resin Pricing, 2011........................... 52
3 Recycled Plastic Market, 2001-2011 55

RECYCLED PLASTIC COLLECTION

1 Recycled Plastic Collection by Source, 2011 61
2 Recycled Plastic Collection, Processing, & Demand, 2011 80

RECYCLED PLASTIC RESINS

1 Recycled Plastic Resins: Collection & Demand, 2011 83

RECYCLED PLASTIC MARKETS

1 Recycled Plastic Demand by Market, 2011..................... 129

INDUSTRY STRUCTURE

1 US Recycled Plastics Market Share, 2011................. 168

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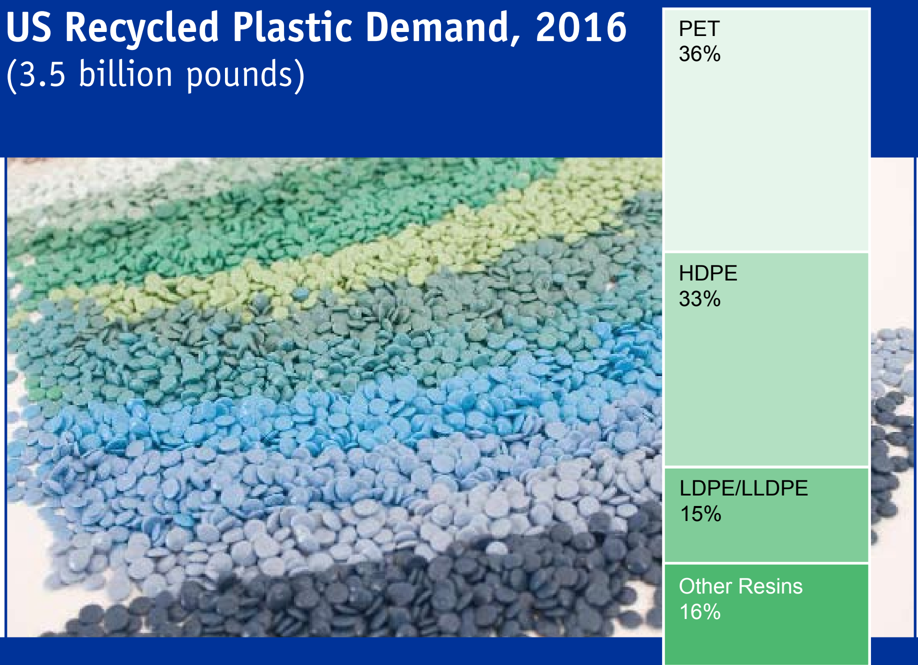
Gains will be driven in part by a growing emphasis on sustainability among packaging and consumer product manufacturers, and advancements in processing and sorting technologies.

US demand to rise 6.5% annually through 2016

US demand for post-consumer recycled plastic is forecast to rise 6.5 percent per year to 3.5 billion pounds in 2016. Gains will be driven by a number of factors, including a growing emphasis on sustainability among packaging and consumer product manufacturers, advancements in processing and sorting technologies allowing a wider variety of plastic to be recycled into high quality resins, and an improved collection infrastructure which raises the plastic recycling rate. Continued support by federal, state, and local governments for recycling efforts will also provide a significant boost to recycled plastic collection, processing, and demand. However, the overall rate of plastic recycling in the US will remain relatively low, since only about half of the plastic collected for recycling makes its way to manufactured products in the US market.

US Recycled Plastic Demand, 2016
(3.5 billion pounds)



Bottles to remain leading source of recycling plastic

Bottles will remain the leading source of plastic for recycling, accounting for over half of all plastic collected in 2016. The well-established collection infrastructure, including deposit laws in several states, makes bottles one of the most widely recycled plastic products. More rapid gains, however, are forecast for other sources, particularly rigid plastics, film, and carpet. The recycling industry has put significant efforts into increasing the collection of rigid plastic, including thermoformed packaging and bulk containers, particularly at the commercial level. Bag and film recycling will also be bolstered by private sector collection initiatives, as these are a key source of raw materials for plastic bag and wood-plastic composite producers.

Recycled PET products to see good growth, while HDPE gains will be subpar

Polyethylene terephthalate (PET) and high density polyethylene (HDPE) were the two leading resins used in recycled plastic products in 2011, accounting for over 70 percent of demand. While PET will see above average gains in demand, fueled by rising recycled content in beverage bottles and thermoformed containers, subpar increases in HDPE collection will limit the availability of recycled resin. The most rapid growth is forecast for recycled low density polyethylene, which will benefit from a rebound in the construction market. Recycled polypropylene will also see healthy gains in demand as collection volumes increase and processing techniques improve the quality of the resin. Rapid growth is expected for smaller volume resins such as nylon and polystyrene, fueled by rising collection of products such as carpet, plastic foam, and consumer electronics for recycling.

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Sample Text, Table & Chart

TABLE IV-3

RECYCLED PET COLLECTION & DEMAND
(million pounds)

Item	2001	2006	2011	2016	2021
Polyethylene Terephthalate Demand					
% collected					
Recycled PET Collection					
Bottles:					
Soft Drink					
Water					
Other					
Rigid Plastics					
Carpet & Film					
lb demand/lb collected					
Recycled PET Demand					

SAMPLE TABLE

RECYCLED PLASTIC RESINS

Markets: PET

SAMPLE TEXT

Recycled PET de… percent per billion pounds in 2016… stantial ac… from the 2001-2011 pe… proved out… pet and furnishings ma… on activity. Additionally, PET dema… g use in hig… resin applications, especially bottles and food containers. Th… availability of recycled PET in the US market, due to PET th… recycling efforts and expansions in processing capacity, will … resin demand. However, advances will be limited by the diff… producing high performance food-grade PET from recycled f… particularly with ongoing issues related to contamination in t… stream.

PET has one of the oldest recycled plastic markets, as the resin has been widely recycled in the US since the 1980s. As a result, the industry is far enough along in its life cycle that some major applications have achieved maturity status. This is most evident in fiber applications for recycled PET, such as carpet, furnishings, apparel, and strapping. In these markets, recycled PET tends to compete strictly on price considerations, rather than by adding value through sustainability or "green" cachet. During the 2006-2011 period, many of these markets experienced declining demand, impacted by the economic recession (carpets, strapping) or overseas competition (apparel, furnishings). For example, in 2001 carpets and rugs accounted for 42 percent of recycled PET demand, but this had fallen to 25 percent of demand in 2011.

Nonetheless, many of these more mature recycled PET … expected to rebound strongly through 2016 as economic pros… prove. Carpet manufacturers are showing a renewed interest… PET, particularly as the marketability of sustainable products… to grow due to their appeal to US consumers. Many carpet m…

88 Copyright 2012

CHART VI-1

US RECYCLED PLASTICS MARKET SHARE
($1.5 billion, 2011)

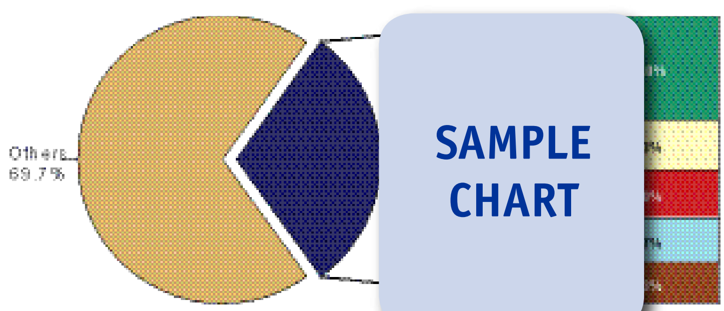

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TABLE V-2

PACKAGING MARKETS FOR RECYCLED PLASTIC
(million pounds)

Item	2001	2006	2011	2016	2021
Plastic Packaging Shipments (bil 2005$)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
lb recycled plastic/000$ pkg	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Packaging Markets for Recycled Plastic	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Bottles	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Containers	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Bags & Film	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Strapping	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% packaging	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Recycled Plastic Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

SAMPLE TABLE

COMPANY PROFILES

MRC Polymers Incorporated
3535 West 31st Street
Chicago, IL 60623
773-890-9000
http://www.mr

Annual Sales:
Employment:

Key Products: ity thermoplas-
tic compounds

SAMPLE PROFILE

MRC Polymers reclaims various grade thermoplastics from post consumer plastic scrap and post industrial plastic wastes and uses them in the production of engineering grade and commodity thermoplastic compounds. The privately held company conducts manufacturing operations at its headquarters site in Chicago, Illinois and also performs toll plastic recycling services.

The Company's range of more than 120 recycled thermoplastic compounds includes polycarbonate, polycarbonate alloys, polycarbonate/acrylonitrile butadiene styrene (ABS) compounds, polycarbonate/polybutylene terephthalate compounds, polyethylene terephthalate (PET) compounds, polycarbonate/PET compounds, and nylon. These products are sold under such tradenames as NAXALOY, EMAREX, MAXNITE, NAXELL, MAXTEL, MAXNITE, and SATRAN. The Company's polymer compounds are high quality, engineering grade products that are marketed as cost competitive alternatives to virgin resins. The Company reclaims thermoplastics from such post consumer plastic scrap materials as large water bottles, advertisement sheets, and car bumpers. Among the post industrial plastic waste recycled by MRC Polymers are compact discs, DVDs, and DVD covers.

209

"Demand for recycled plastic in bottles will rise 4.7 percent per year to 860 million pounds in 2016. Bottles will continue to account for the majority of recycled content plastic packaging due to the presence of well developed and economically viable recycling infrastructures for polyethylene terephthalate (PET) and HDPE, and expanding bottle-to-bottle recycling activity in PET bottles. Additionally, ..."

--Section V, pg. 131

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Other Studies

Natural Polymers

US demand for natural polymers is forecast to expand 6.9 percent annually to $4.6 billion in 2016. Cellulose ethers, led by methyl cellulose, will remain the largest product segment. Exudate and vegetable gums will enjoy the most rapid gains in demand. The oilfield market will grow the fastest, driven by rising demand for guar gum in hydraulic fracturing fluids. This study analyzes the $3.3 billion US natural polymer industry, with forecasts for 2016 and 2021 by market and product. The study also evaluates company market share and profiles industry players.

#2963 .... November 2012 .... $4900

Fluoropolymers

US demand for fluoropolymers is forecast to increase 5.3 percent annually to $2.4 billion in 2016. Polytetrafluoroethylene (PTFE) will remain the largest and most valuable segment, while polyvinyl fluoride (PVF) and polyvinylidene fluoride (PVDF) will grow the fastest. The construction and electrical/electronics markets will be the fastest growing outlets. This study analyzes the $1.9 billion US fluoropolymer industry, with forecasts for 2016 and 2021 by product, application and market. The study also evaluates company market share and profiles industry players.

#2938 .... August 2012 .... $4900

Bioplastics

US demand for biodegradable and non-biodegradable bio-based resins is forecast to climb at a 20 percent annual pace through 2016 to 550 million pounds. Polylactic acid will remain the largest bioplastic segment, while bio-based polyethylene and degradable polyesters will grow the fastest at double-digit rates. Nonpackaging markets will outpace packaging uses. This study analyzes the 220 million pound US bioplastic industry, with forecasts for 2016 and 2021 by resin, product and market. The study also evaluates company market share and profiles industry players.

#2908 ....June 2012 4900

High Performance Composites

US demand for polymer materials containing advanced fiber reinforcements is forecast to rise almost 15 percent per year to $10.2 billion in 2016. Aerospace will remain the dominant and fastest growing market, followed by the energy market. Carbon will continue as the dominant and most rapidly growing fiber, followed by S-glass. This study analyzes the $5.1 billion US high performance composite industry, with forecasts for 2016 and 2021 by fiber, market and resin. The study evaluates company market share and profiles industry players.

#2905 ....June 2012 .... $4900

Silicones

US demand for silicones is forecast to climb 5.6 percent annually to $4.1 billion in 2016. Silicone resins and elastomers will be the fastest growing products, with elastomers overtaking silicone fluids as the largest segment by 2016. The industrial market will remain dominant while the construction segment grows the fastest as it rebounds from previous declines. This study analyzes the $3.1 billion US silicone industry, with forecasts for 2016 and 2021 by product, market and application. It also evaluates company market share and profiles industry players.

#2879 ....April 2012 .... $4900

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