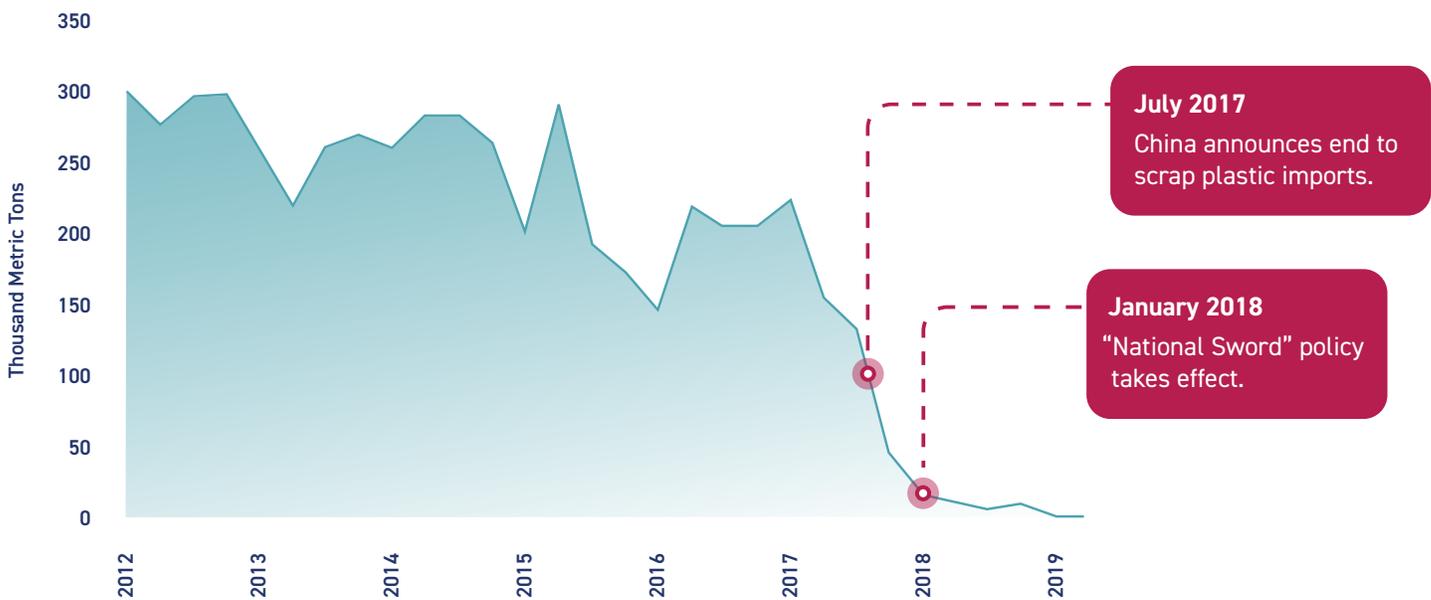


New Investments in Modernizing Plastics Recycling in the U.S.

A Need and an Opportunity

After decades as the world's largest buyer of scrap materials, in July 2017 China announced that it would no longer permit its domestic buyers to import plastic or paper scrap above a stringent 0.5% contamination threshold, and in January 2018, China's "National Sword" policy went into effect. This shift created a short-term disruption among exporters around the world, and also led to a rush to invest in new recycling opportunities here in the United States.

Plastic Scrap Exports to China

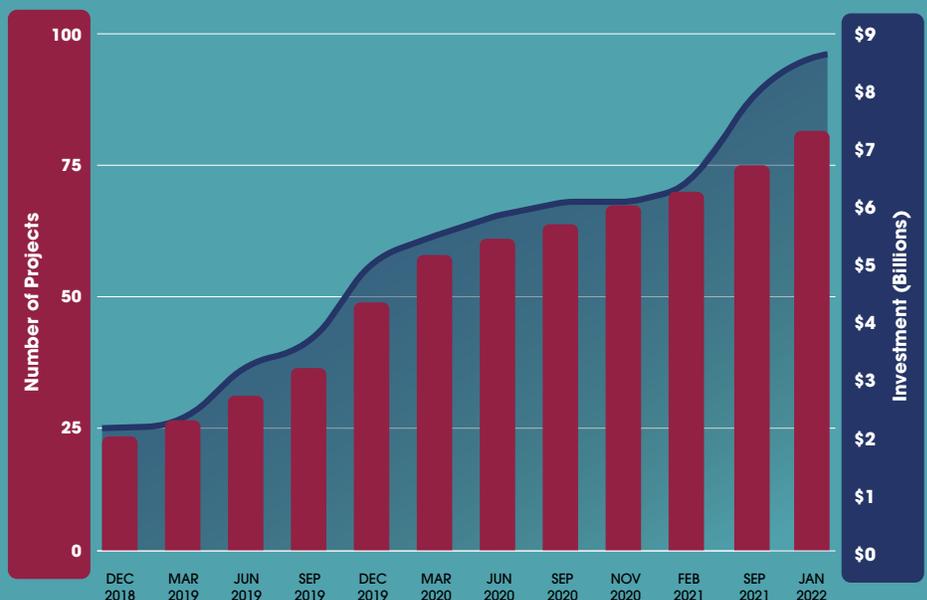


Industry Action

In the months following China's import restrictions, a wave of new investments has been announced in the United States, expanding both plastics recycling capacity and the use of new technologies, including in both traditional and advanced recycling.

These announcements support our view that the new materials economy has a bright future, driven by China's action and the rapidly growing societal interest in building more circular systems. Increasingly, U.S. businesses are taking the lead in reducing waste and better managing our resources here at home.

Cumulative Announced Investments in Plastics Recycling in the U.S.



New Investments in U.S. Plastics Recycling

81

PROJECTS

Announced since July 2017 in the U.S.

\$8.7

BILLION

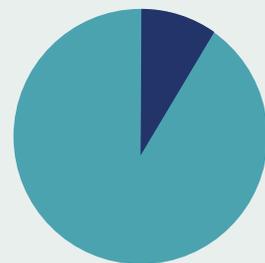
Combined projects value

6.2

MILLION

Tons or about 13.6 billion pounds of waste* potentially diverted from landfills

*Mostly plastic, but includes other waste (MSW, cartons, electronics, etc.)



89% Advanced recycling**

11% Mechanical recycling**

**based on investments

New Ways to Reuse Plastics

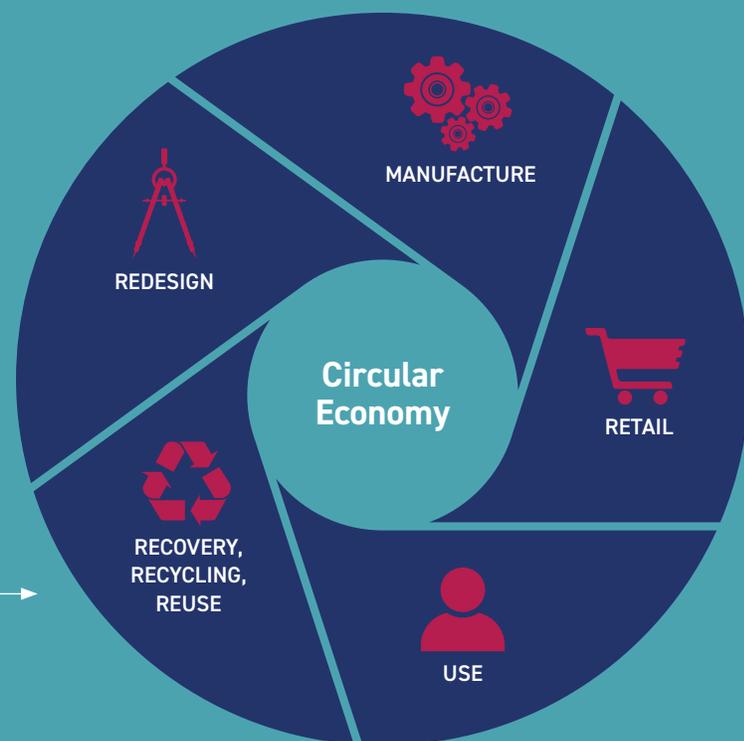
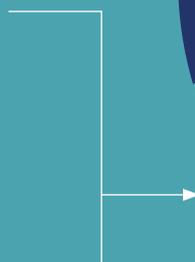
Today a growing number of post-use plastics are being repurposed to create a range of useful products for new manufacturing, from the feedstocks to create brand new plastics to transportation fuels, waxes, and a wide range of raw materials.

Traditional Recycling

Innovations to strengthen traditional recycling are increasing, with more effective sorting technologies (e.g., artificial intelligence, robotics, near-infrared optics, etc.) being introduced for different plastic types.

Advanced Recycling

Growing investments in advanced recycling technologies are also expanding the types of plastics that can be reused, as well as the range of outputs that can be produced, making it a promising option for the path forward.



An Industry Moving Forward

U.S. businesses across a variety of sectors are taking bold steps to help end plastic waste and create a more circular economy for plastics with significant investments in technology, systems, and infrastructure so more plastics are recovered, recycled, and reused. These investments are moving us closer to attaining our goal of reusing, recycling, or recovering all plastic packaging by 2040.

Learn more about industry advances at plasticmakers.com

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