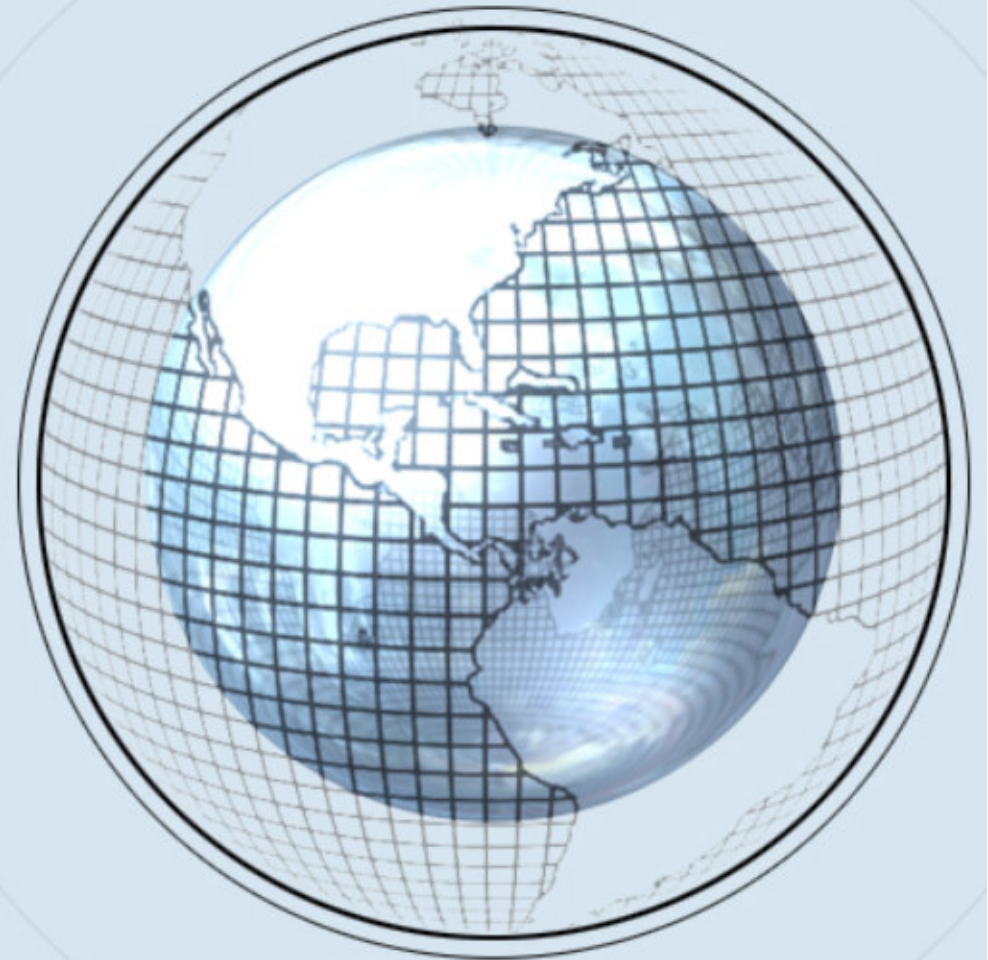


Lakes States TAPPI - October 2008

Overview of the World Recovered Paper Market

Bill Moore, President –
Moore & Associates
Atlanta, GA
www.MARecycle.com

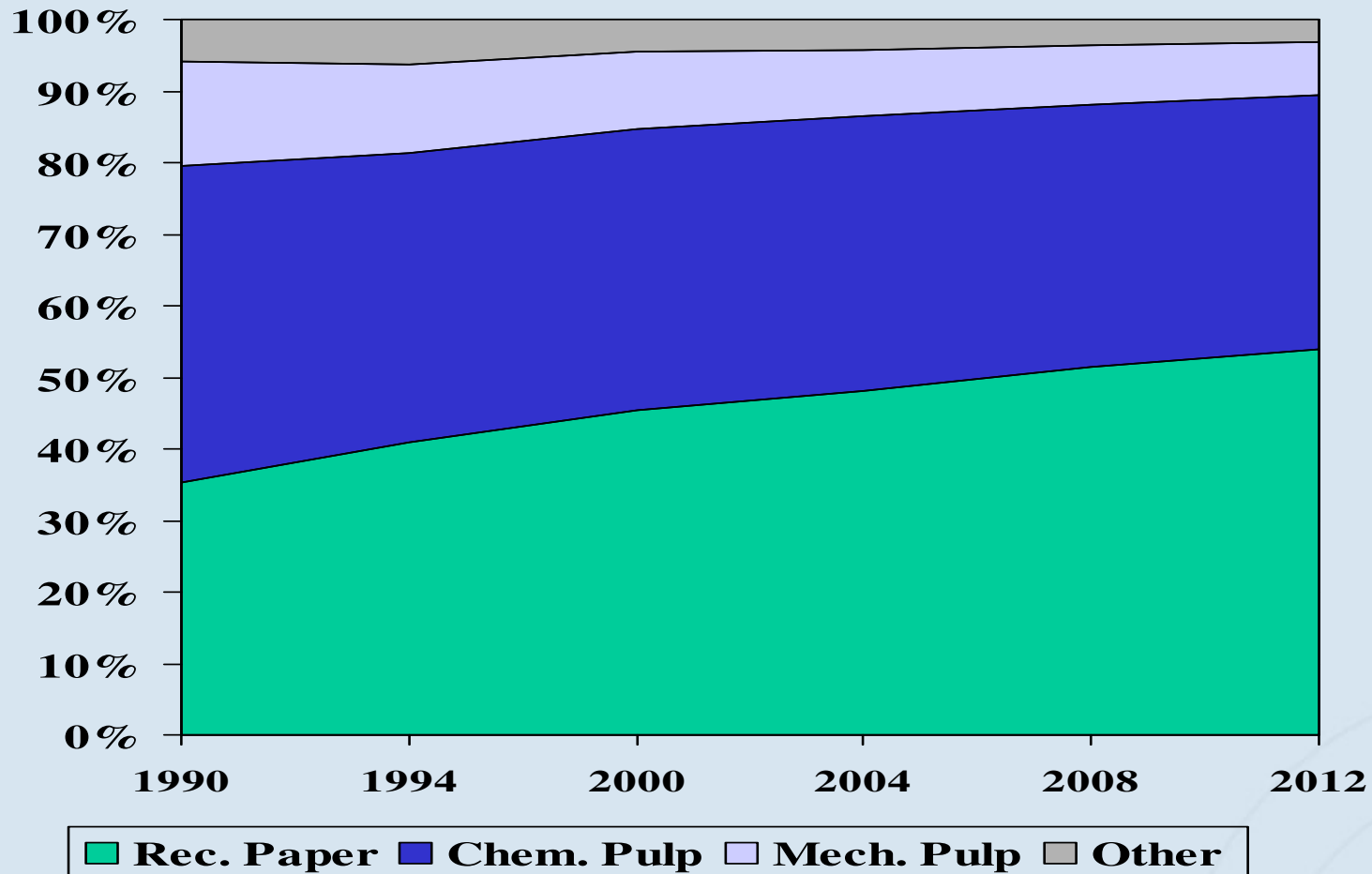


Moore & Associates – Paper Recycling Market Consultants

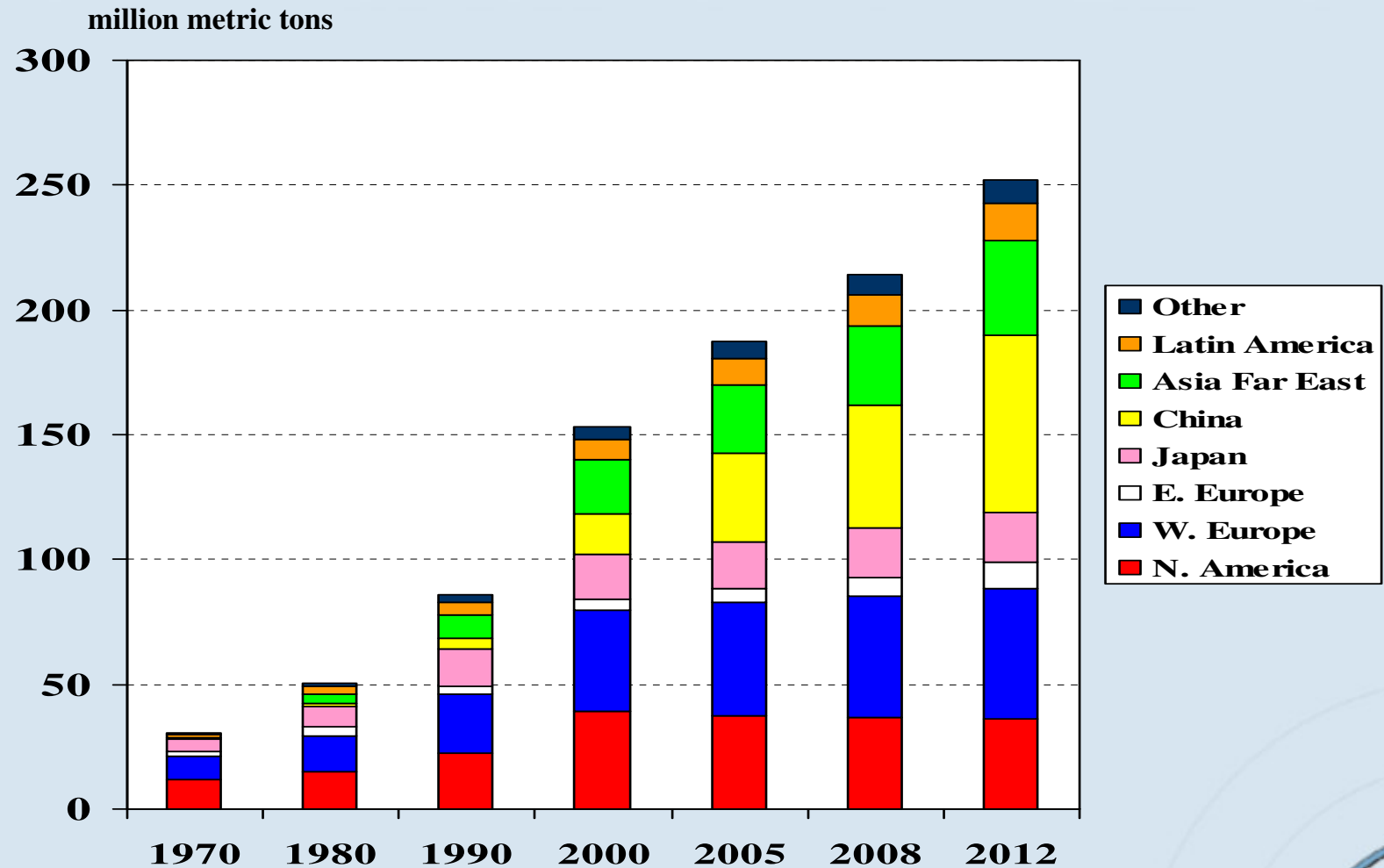
- **Recovered Paper Market Experts**
- **Based in the US, Global Practice**
- **Market Research**
- **Pricing: Benchmarking, Analysis, and Forecasting**
- **Recovered Paper Procurement Optimization**



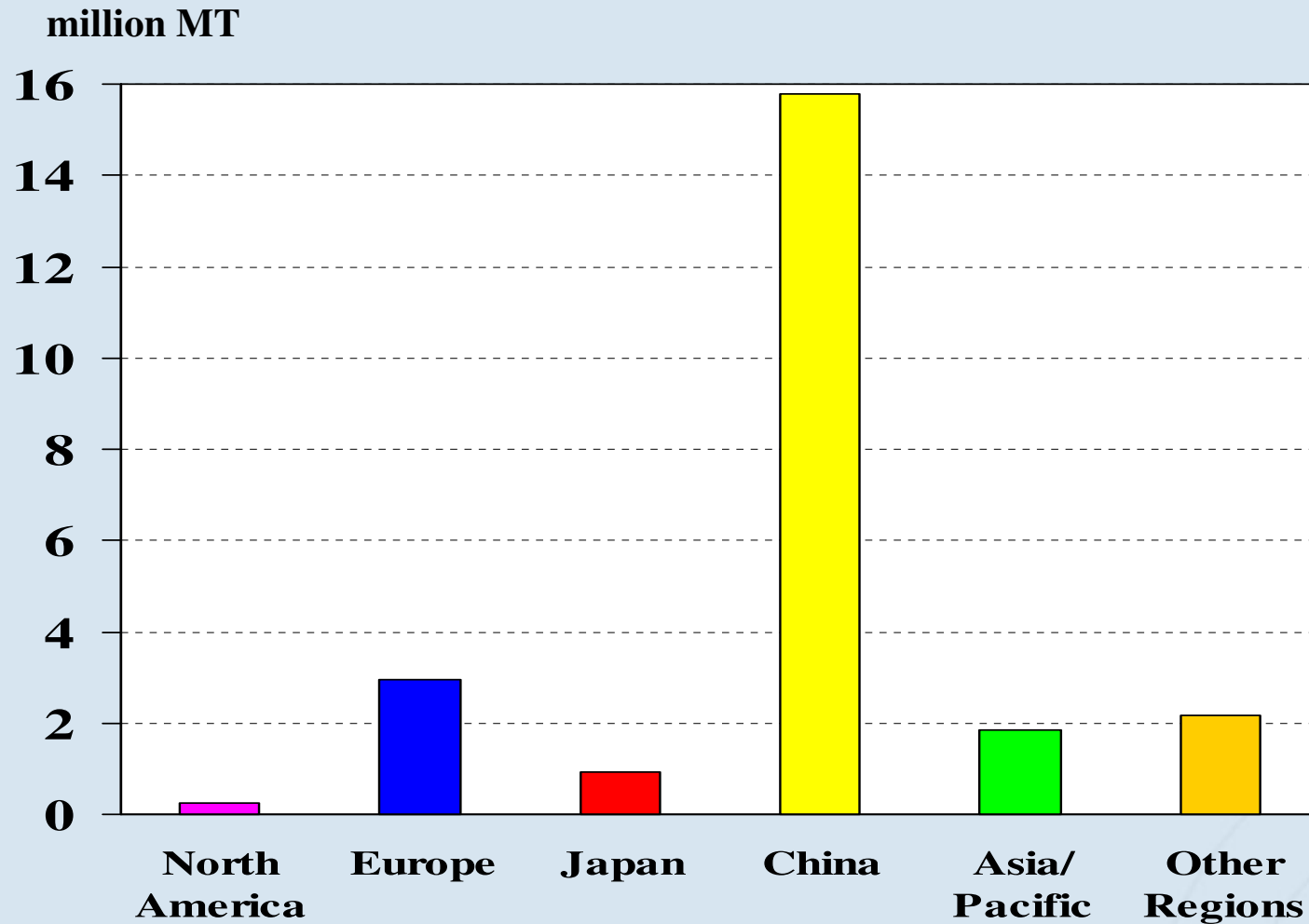
Fiber Furnish Used in Global Paper and Board Manufacture 1990-2012



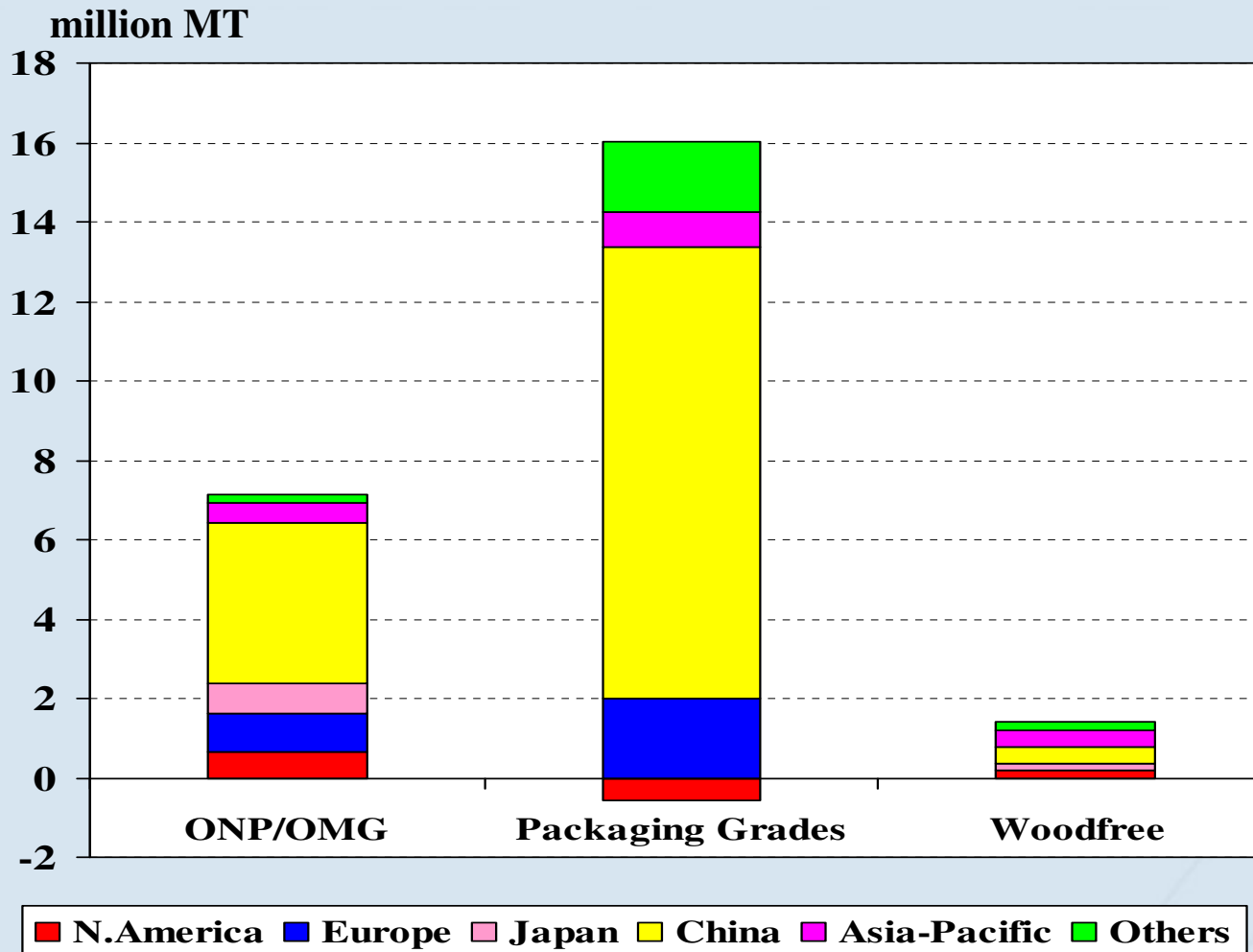
Recycled Fiber Consumption by Region 1970-2012



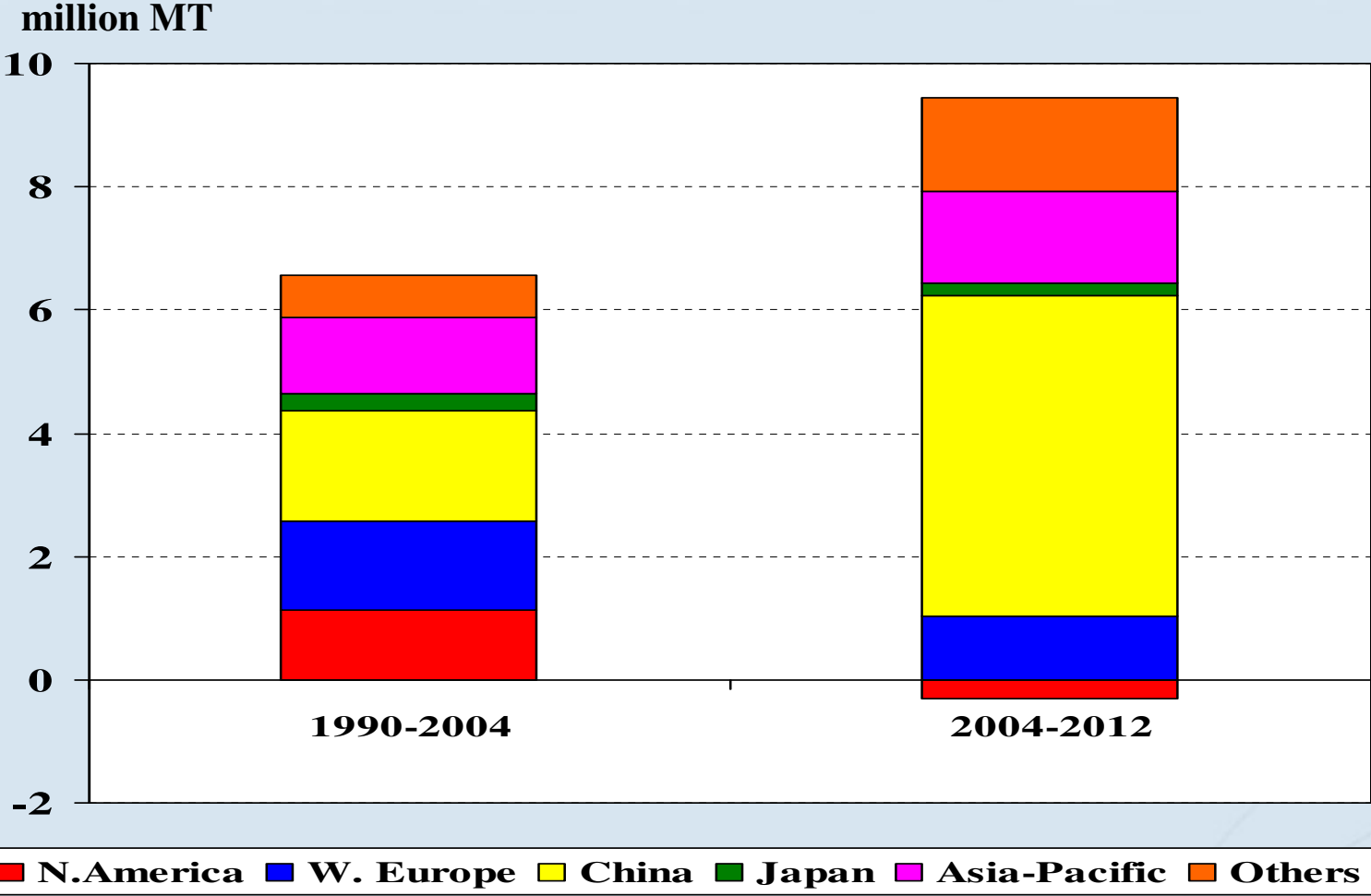
Global Investment in Additional Mill Recycling Capacity 2005-2009



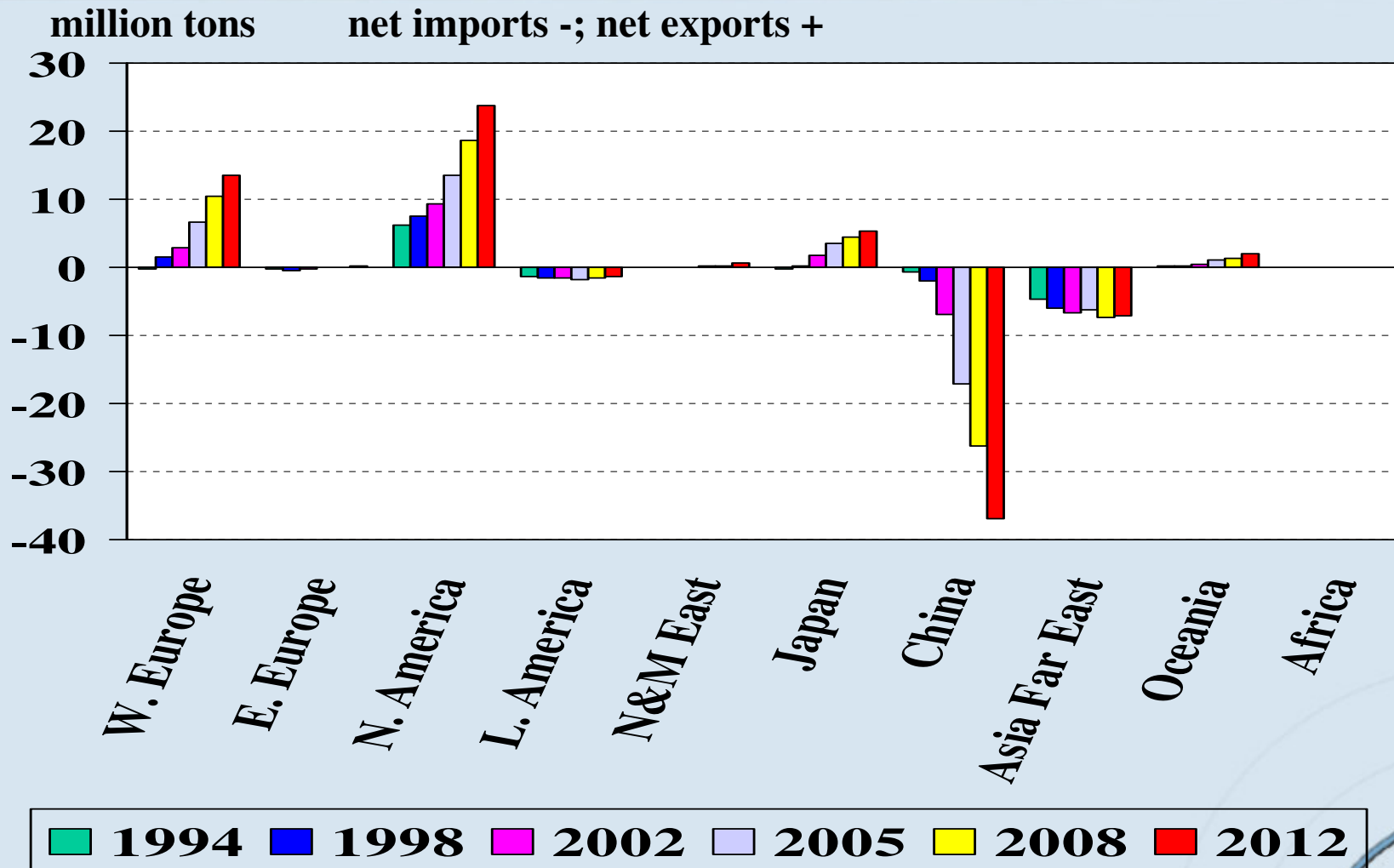
Global Investment in Additional Recycling Capacity by RCF Type in 2005-2009



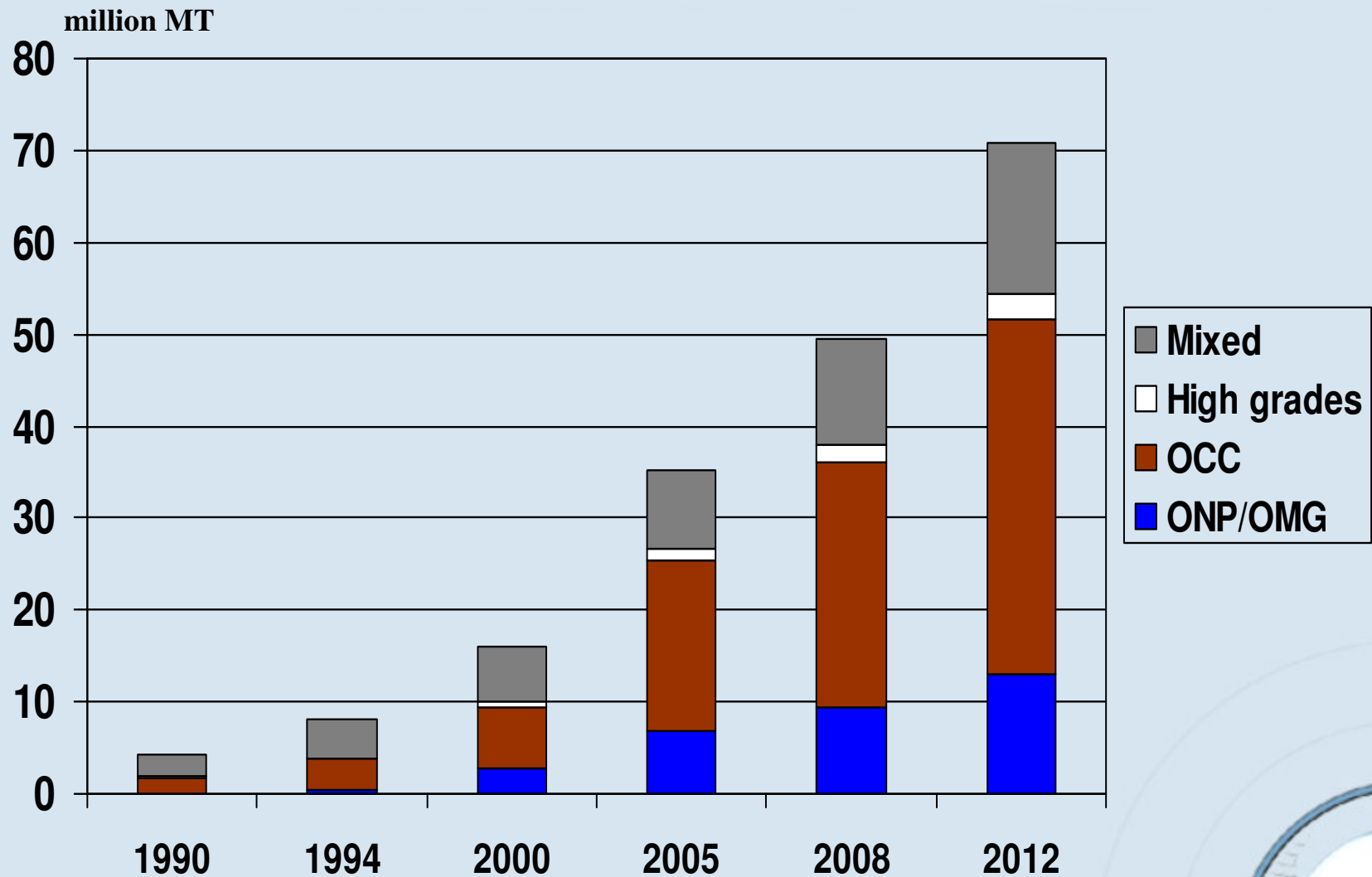
Average Annual Recovered Paper Consumption Increase 1990-2004 vs. 2004-2012



World Net Importers and Exporters of Recovered Paper

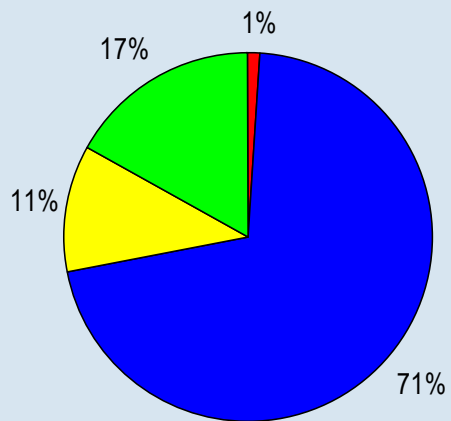


Chinese Consumption of Recovered Paper by Grade

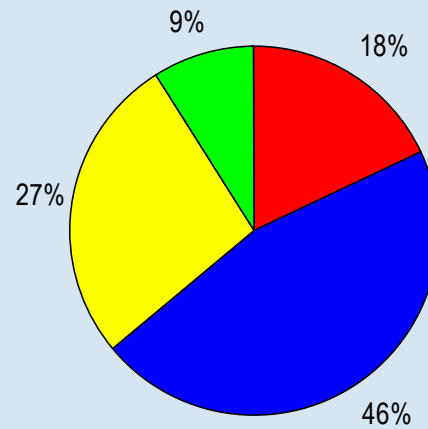


China Recovered Paper Imports by Region

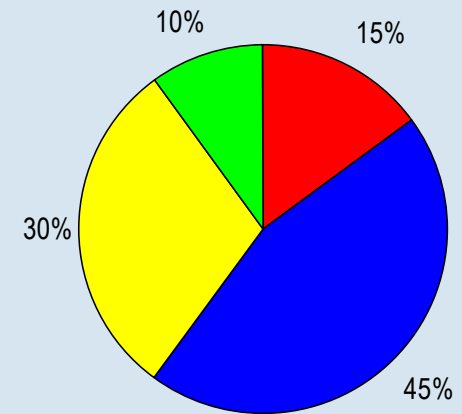
2000



2005



2007

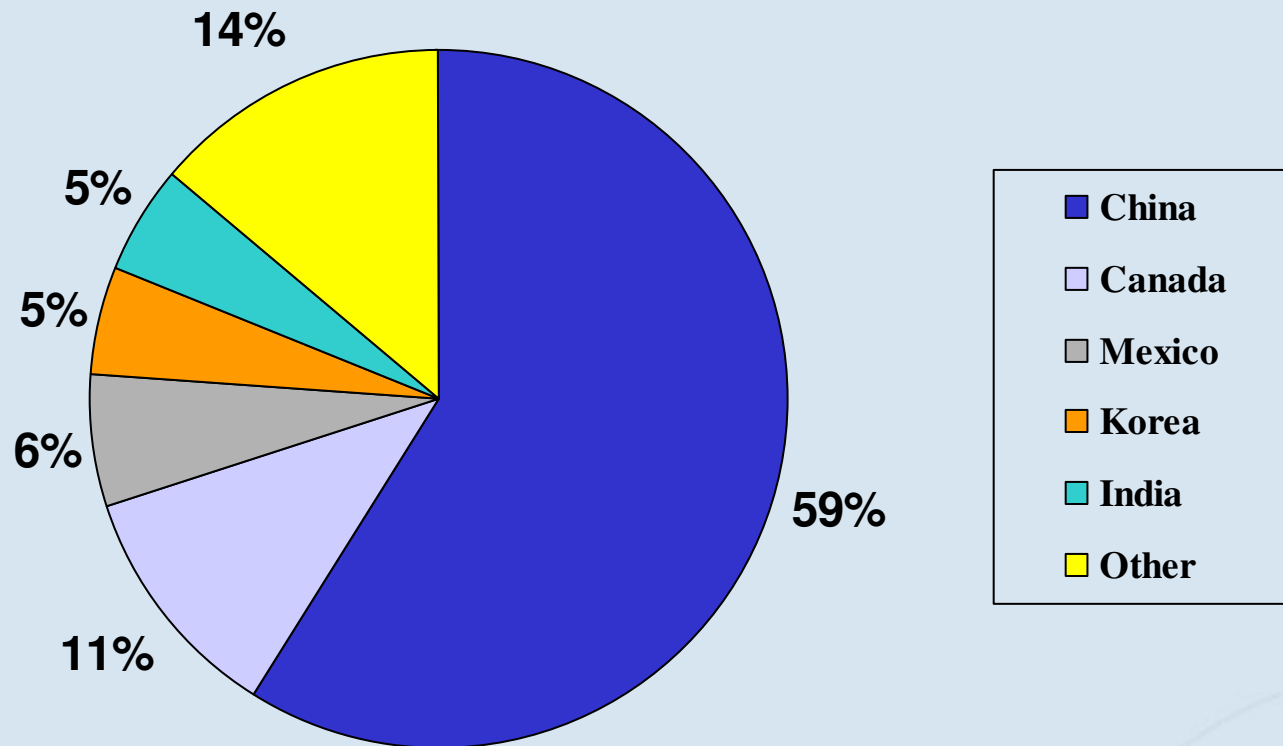


■ Japan ■ N. America ■ W. Europe ■ Other



US Recovered Paper Export Destinations in 2007

(Source – US Bureau of Census/Dept. of Commerce)

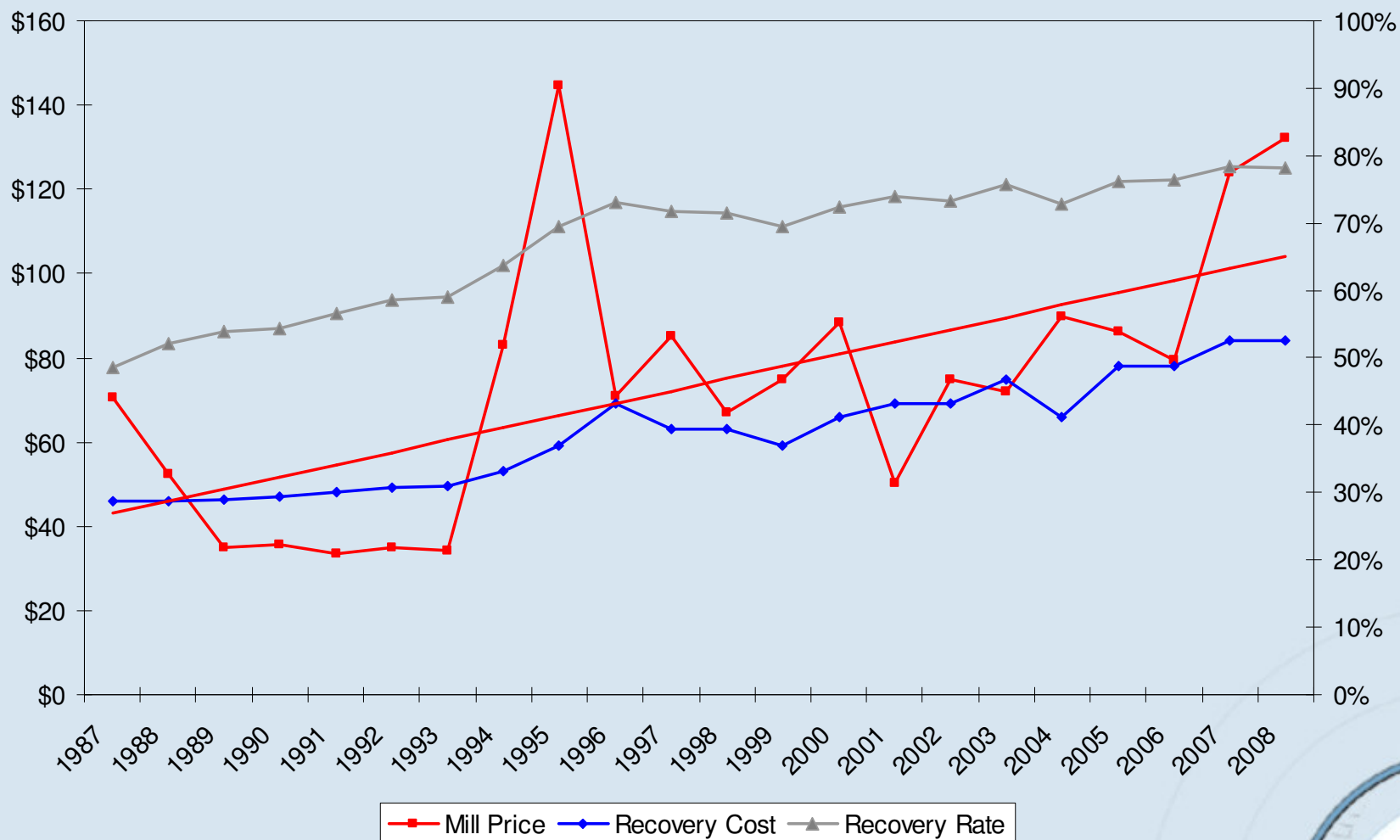


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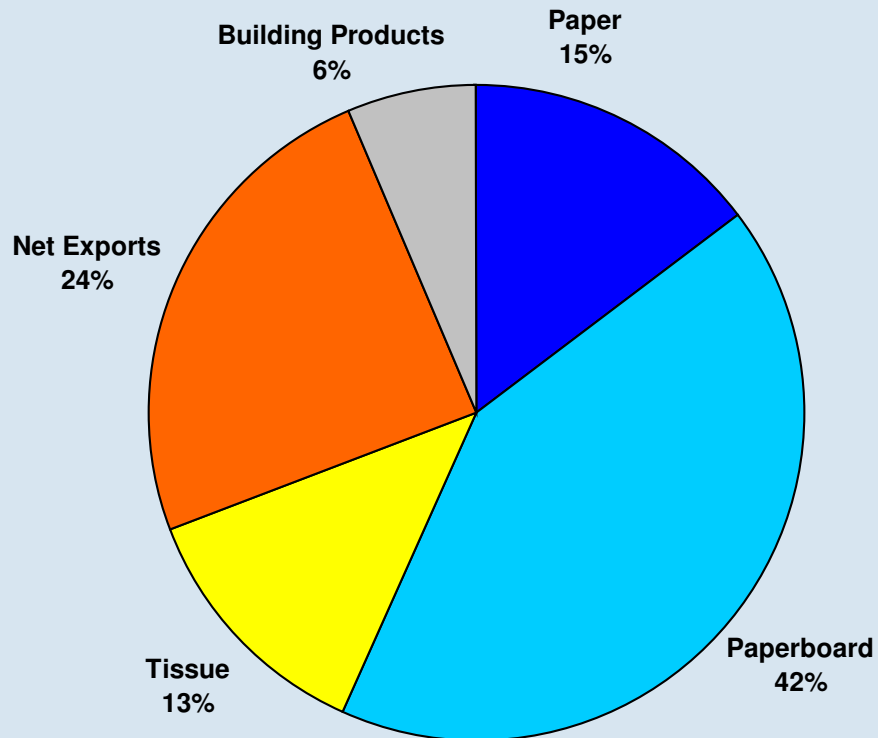


US OCC Recovery versus Cost



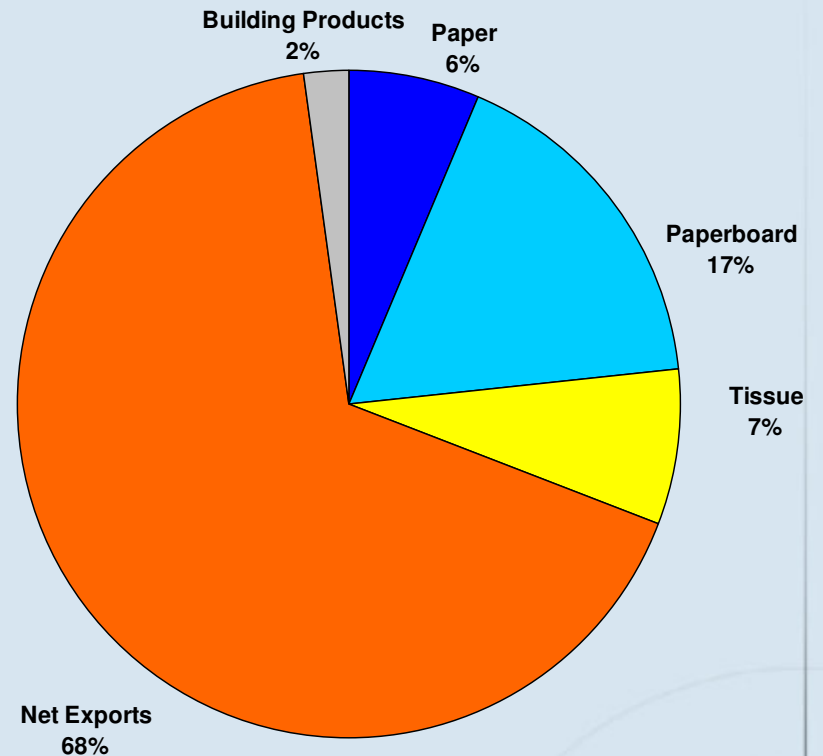
Market Trends – Mixed Paper

1997



6.2 million tpy

2007

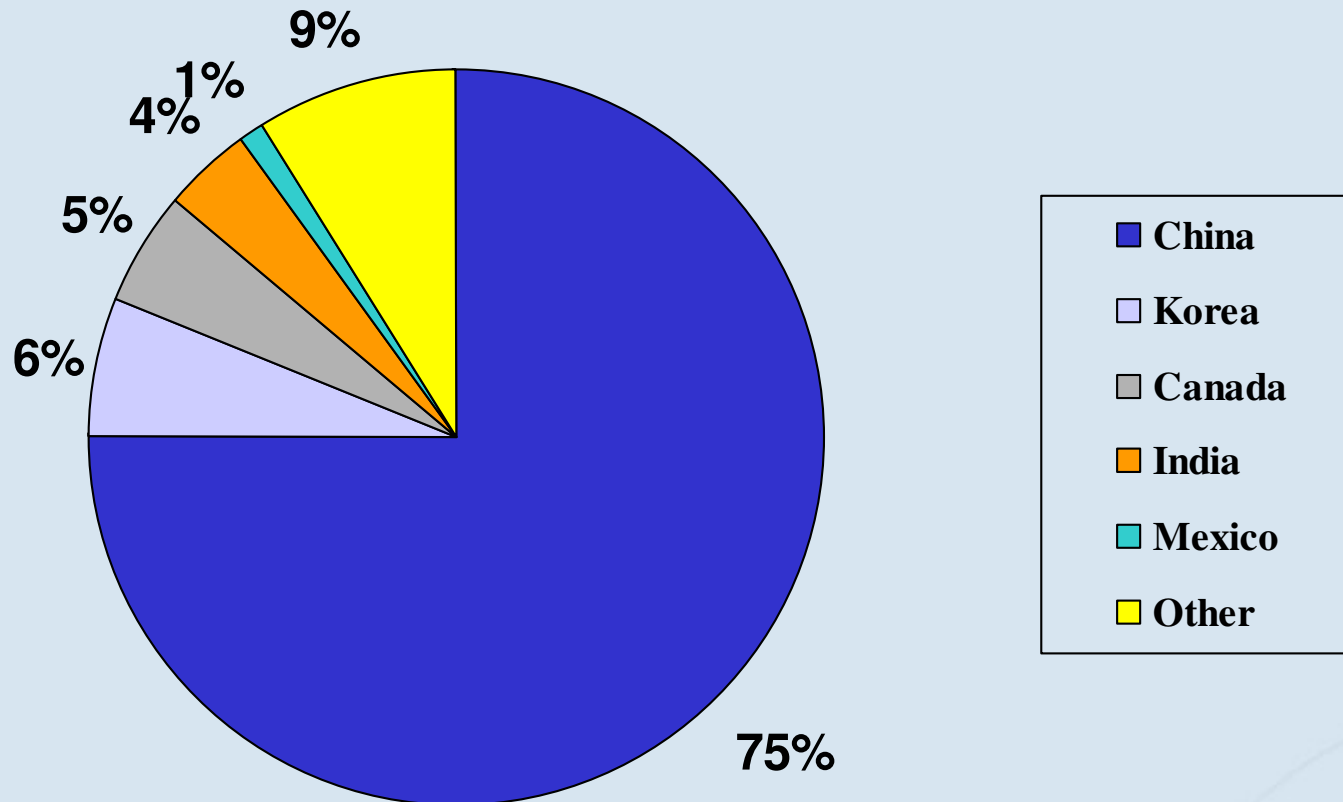


13.6 million tpy

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US Mixed Paper Export Destinations – 2007

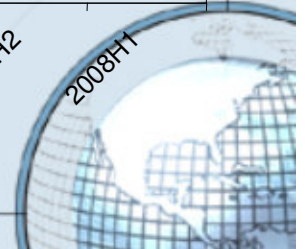


US Mixed Paper versus OCC Price



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& Associates



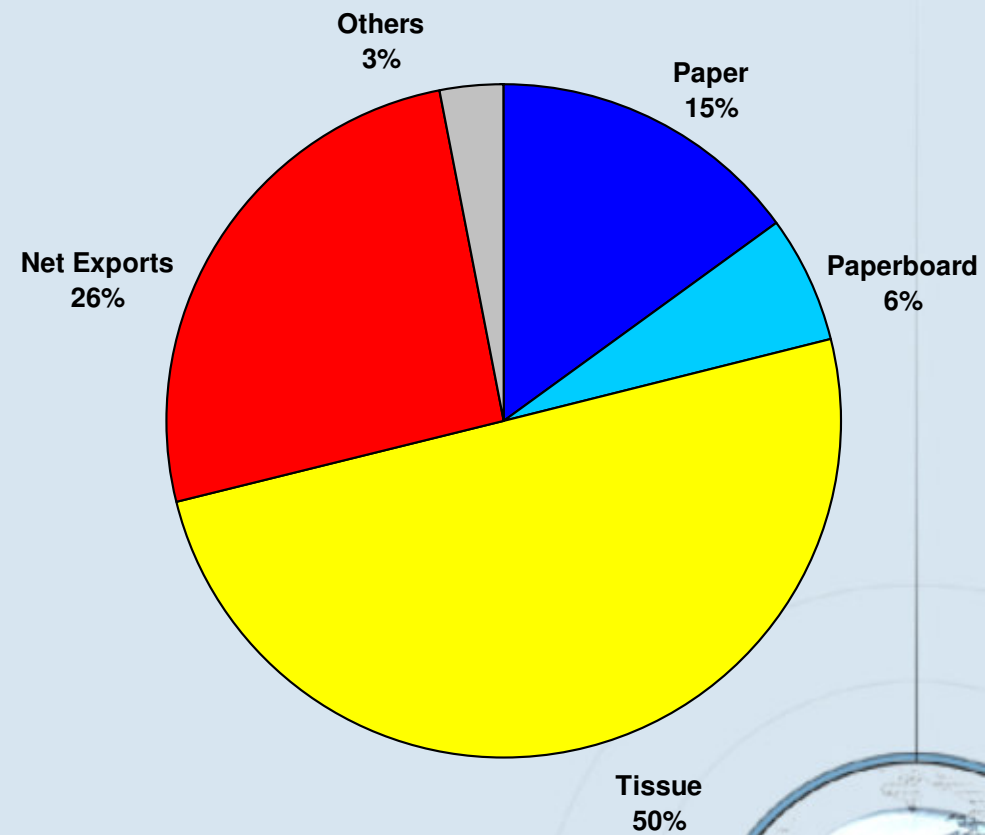
Use of US Deinking High Grades

1998



3.8 million tpy

2007

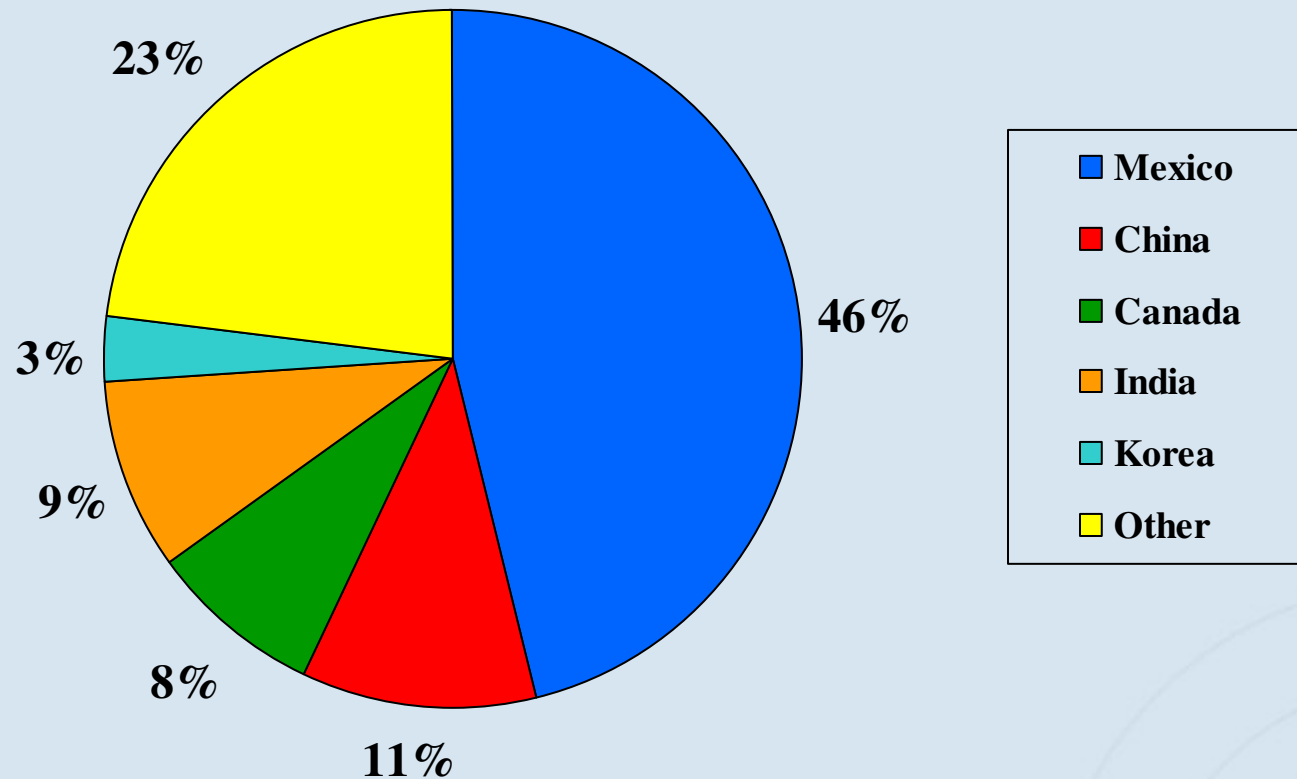


3.8 million tpy



US Deinking High Grades Export Destinations – First Half of 2008

(Source – US Bureau of Census/Dept. of Commerce)



Paper Recovery at the Collector Level in China



Thank You for Your Attention

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