2010 AF&PA Community Survey Executive Summary

Since 1994, the American Forest & Paper Association ("AF&PA") has performed a series of national surveys to measure the extent and track the growth of access by the public to community-level paper and paperboard recycling. In recent iterations, the survey has also addressed the prevalence of single-stream collection in curbside recycling systems. This summary report presents background information on the survey methodology and presents notable findings of the 2010 AF&PA Community Survey ("2010 Survey"), and compares those results to data from prior years.

Survey Background

According to the U.S. Census Bureau, there are a total of 3,143 counties in the United States, containing a population of 311.6 million people and 34,031 communities (as of July 1, 2010). To estimate the extent of paper/paperboard recycling in the U.S., this study conducted surveys using the following data gathering strategies:

- **Direct Survey of Large Counties**: Because recycling is generally more prevalent in populous areas, the survey targeted county-level recycling coordinators from about 1,200 of the most populous counties in the nation. The county-level coordinators were asked to provide paper/paperboard recycling information for the 19,895 communities in their counties, representing 90 percent of the U.S. population. Responses to the direct survey were received from recycling coordinators covering 90 percent of the surveyed communities' population, which provided confirmed survey coverage for 81 percent of the total population of the U.S. The population coverage achieved with these response rates is extremely high and provides high quality community-specific program data. Survey results from the responding communities were used to estimate recycling access for the small percentage of direct survey communities that did not respond.

- **Representative Sample of Small Communities**: Of the remaining 14,136 communities (covering 10 percent of the U.S. population) not targeted by the direct survey, a statistical approach based on a random sample of communities was used to extrapolate nationwide totals for the number of communities with access to paper/paperboard recycling..

This report presents survey results using two different metrics. First, results are reported using the percentage of population with access to paper/paperboard recycling. Population is easily understood and can be readily compared against other studies that are relevant or comparable to this one. Second, results are reported based on the number of communities as defined by the U.S. Census Bureau. The definition of a "community" changed as a result of the 2000 Census. Therefore, the definition of a community as applied in this study may differ from other studies that purport to provide similar results. For this reason, results by population are presented as the primary measurement of survey results, supplemented with results by number of communities with access. For purposes of comparing the 2010 Survey with other survey results, we have provided the percentage of population with recycling access, rather than the absolute number, in order to normalize for the effect of population growth. Although both of these result sets are

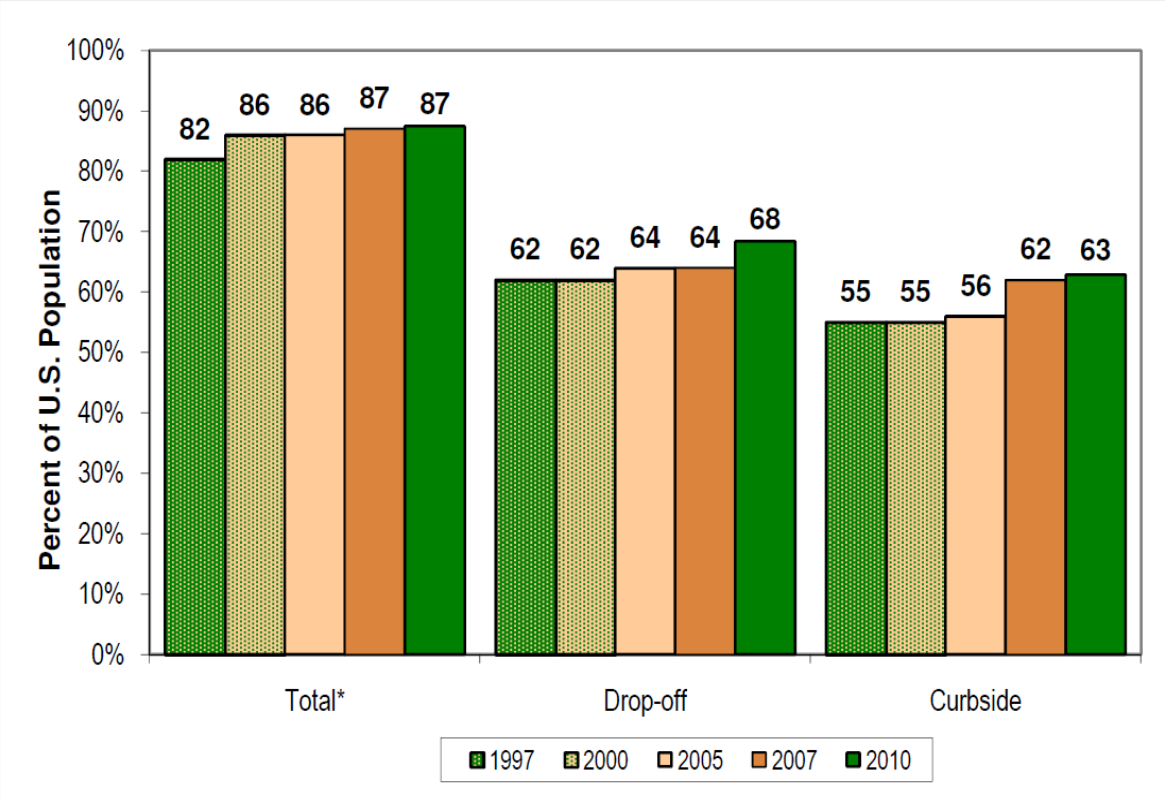
presented in this report, the results by population are most useful for trend analysis and comparison with other data sources.

Results Summary

The methodology used for the 2010 Survey is consistent with the methodology used in other survey years, which means that data from successive surveys can be compared in order to identify trends. The only notable change to the 2010 Survey was to broaden the category definition for paper bags to include all paper bags – in prior year surveys, the paper bags category was defined to only be for brown kraft bags.

High Level of Paper/Paperboard Recycling Program Access: Whether measured by the percentage of population or by the number of communities with access, the 2010 Survey suggests that overall access to paper/paperboard collection through community-sponsored curbside and drop-off recycling programs has leveled off and access is not growing at the rate that it had in the past. Figure 1 shows this trend.

Figure 1
1997-2010 Results: Percentage of Population with Access to Paper/paperboard Collection



** Note that the total population with access is NOT equal to the sum of curbside and drop-off population with access, since many communities provide access through both curbside and drop-off collection.*

Although there appears to be a modest increase in the population with access to dropoff recycling programs since the last survey, this did not translate into a significant increase in the overall population with recycling collection access. We believe that this is due to an increase in drop-off collection access in areas where there already was curbside collection that was provided. It is likely that communities are expanding their networks of drop-off locations of discards not collected frequently at curbside (e.g., electronics, bulky items) and also including materials collected in the residential recyclables collection programs at those sites as well. Table 1 provides data on the population with access for the 2010 Survey that was depicted in Figure 1. It also provides data on the number of communities with access to paper and paperboard recycling in total, in curbside programs, and in drop-off programs.

Table 1
2010 Paper/Paperboard Recycling Program Summary

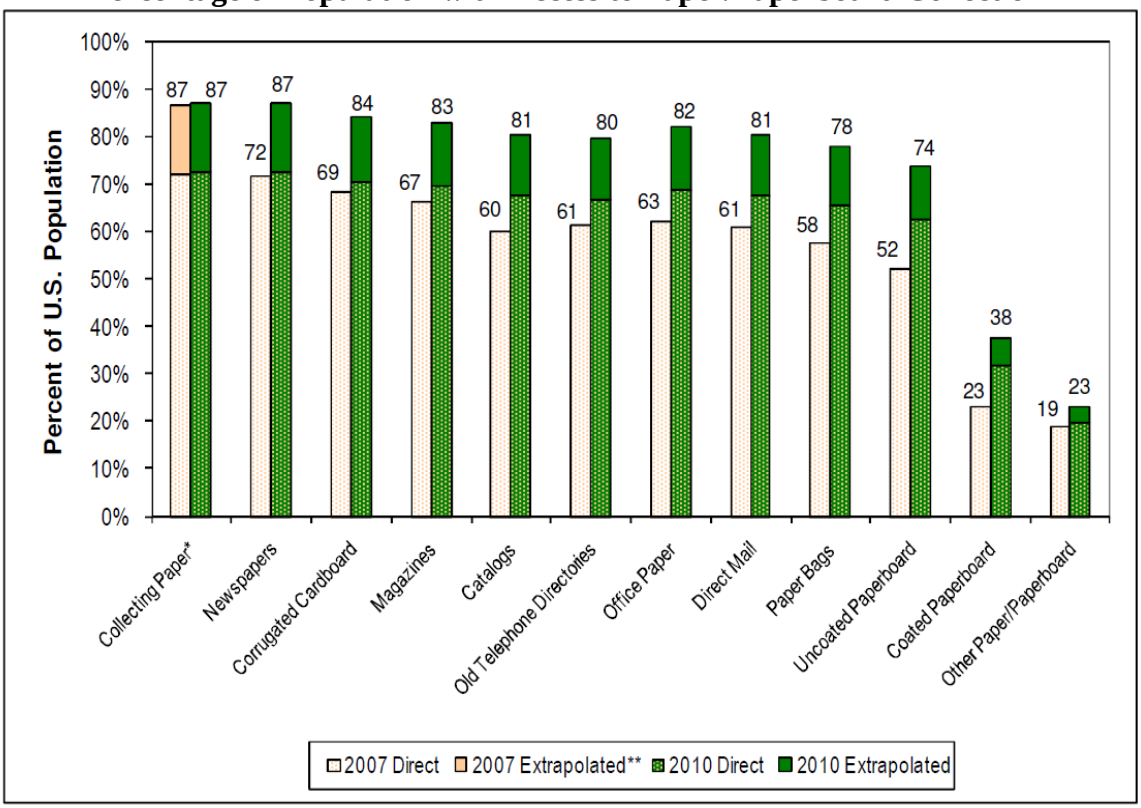
	Population with Access		**Communities with Access**	
	Population (Millions)	**Percent of U.S. Total**	**Number of Communities**	**Percent of U.S. Total**
Curbside Recycling Programs	196	63%	10,573	31%
Drop-off Recycling Programs	213	68%	21,454	63%
Total Recycling Programs	273*	87%	24,977	73%

** Note that the total population with access is NOT equal to the sum of curbside and drop-off population with access, due to the fact that many communities provide access through both curbside and drop-off collection.*

Meaningful Expansion of Paper Recycling in Existing Programs: The survey asked respondents to report which types of paper and paperboard products were accepted in recycling collection programs. Although recycling access in general did not increase since the 2007 Survey, access for some types of paper and paperboard products did increase – specifically recycling collection access for coated and uncoated paperboard, catalogs, and paper bags increased. This means that communities with existing curbside and drop-off programs added additional types of paper and paperboard to their programs. Figures 2 and 3, which compare the percentage of population and percentage of communities with access to paper/paperboard recycling, respectively, show this. In the figures, “direct” results represent county-level

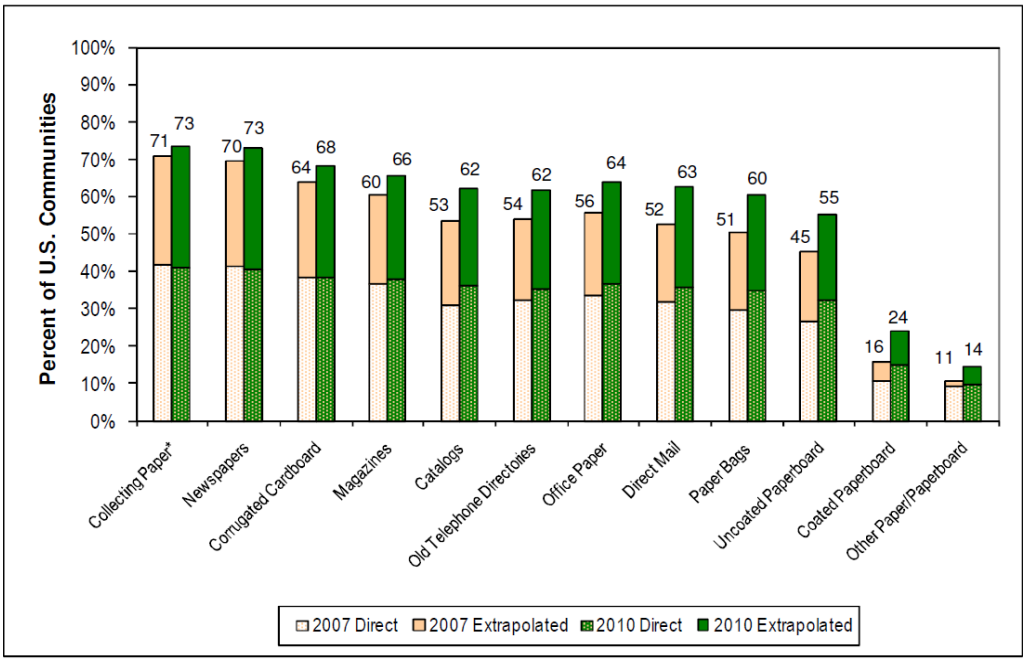
respondents and the "extrapolated" results represent the estimate for the remaining portion of population/communities as described above.

Figure 2
Percentage of Population with Access to Paper/Paperboard Collection



** "Collecting Paper" refers to the total population with access to least one paper or paperboard category.*

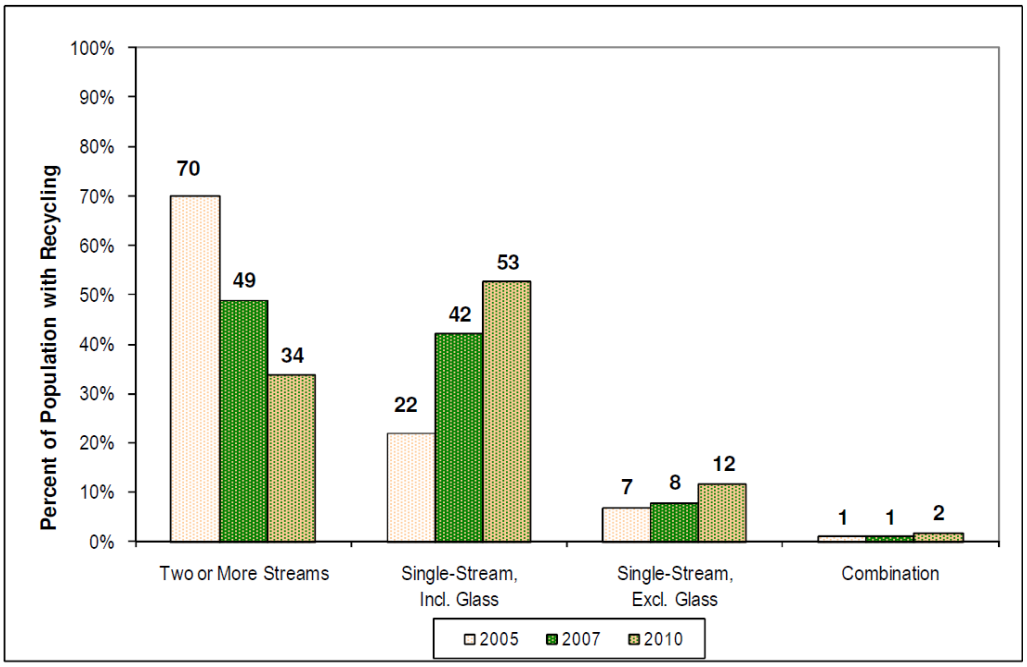
Figure 3
2007 vs. 2010 Comparison: Percentage of Communities Collecting Paper/Paperboard



** "Collecting Paper" refers to the total number of programs that collect at least one paper or paperboard category.*

Growth in Single-stream Collection: Single-stream recycling – where all fiber grades and recyclable containers are collected commingled together in one compartment on the recycling collection vehicle – has been a growing trend for the past fifteen years. The prevalence of single-stream collection was first evaluated in the 2000 Survey, and has continued to be evaluated in the subsequent surveys. As shown in Figure 4, the growth in single-stream recycling has steadily increased. In 2005, only 29 percent of the population with recycling had access to a single-stream program. By 2010, that number has increased to 64 percent. Although R. W. Beck has not attempted to correlate the trend to single-stream collection with the expansion in fiber products collected in programs, anecdotal evidence suggests such a relationship exists.

Figure 4
2007 vs. 2010 Comparison: Percentage of Communities Collecting Paper/Paperboard



** "Combination" means different haulers in some communities may use different collection techniques for recycling collection*