

United States Recovered Paper Market By Grade (Low Grade Paper, High Grade Paper, Brown Paper, Others), By Type (Printing & Writing Paper, Newsprint, Tissue, Containerboard), By End User Industry (Food & Beverage, Electrical & Electronics, Automotive, Pharmaceuticals, Others), By Region, Competition, Forecast and Opportunities, 2018-2028F

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Abstracts

United States Recovered Paper Market has reached at a volume of 41.84 Million Tonnes in 2022 and is anticipated to project steady growth in the forecast period with a CAGR of 5.60% through 2028. United States has made significant strides in promoting sustainability and environmental responsibility, and one area where this progress is evident is in the recovered paper market. Recovered paper, commonly referred to as recycled paper or paperboard, plays a crucial role in reducing the environmental impact of the paper industry.

Recovered paper refers to paper and paperboard products that have been used and collected for recycling. These materials are processed and repurposed into new paper and paperboard products. The recovered paper market is a vital component of the larger recycling industry, contributing to the circular economy by reducing the need for virgin pulp and conserving natural resources.

Growing environmental awareness has driven consumers and businesses to demand more sustainable and eco-friendly products. Recovered paper supports these initiatives by reducing the industry's carbon footprint and conserving trees, water, and energy. Federal and state governments have implemented various regulations and policies to encourage recycling and reduce landfill waste. These regulations have pushed

industries to prioritize recycling and invest in recovered paper processing facilities.

Key Market Drivers

Environmental Awareness and Sustainability

Increasing environmental awareness among consumers has led to a greater demand for eco-friendly products. People are actively seeking out products that have a lower environmental impact. Recycled paper products, made from recovered paper, are perceived as more environmentally responsible and sustainable alternatives to those made from virgin materials.

Sustainability initiatives have pushed consumers and businesses to prioritize sustainable packaging solutions. This includes corrugated cardboard boxes, packaging materials, and labels made from recovered paper. As e-commerce continues to grow, the demand for sustainable packaging is on the rise, further driving the demand for recovered paper.

The recovered paper market directly contributes to the reduction of deforestation. As consumers and companies seek to protect forests and preserve biodiversity, the use of recovered paper helps reduce the need for cutting down trees for paper production. This aligns with the goals of environmental organizations and sustainability initiatives.

Environmental awareness has prompted governments at various levels to introduce and enforce regulations aimed at reducing waste and promoting recycling. These regulations often require businesses to use recycled content in their products. As a result, industries turn to recovered paper to meet these regulatory requirements.

Technological Advancements

Modern recycling facilities are equipped with state-of-the-art sorting and screening technologies. Automated conveyor belts, optical sorters, and air classifiers help separate different types of paper, removing contaminants like plastic, glass, and metal. This advanced sorting reduces the contamination levels in recovered paper, making it more valuable and suitable for reuse. Technology allows for more precise quality control in the recycling process. Sensors and scanners can identify and eliminate low-quality or non-recyclable materials, ensuring that the recovered paper meets industry standards and customer requirements. Technological advancements have improved the

processing of recovered paper into pulp, a critical step in paper and paperboard production. High-tech pulping equipment and systems can efficiently break down and de-ink recovered paper, resulting in pulp with consistent quality and purity.

Sustainable technologies have made recycling more energy efficient. Modern recycling plants are designed to minimize energy consumption and greenhouse gas emissions, aligning with sustainability goals. This makes recycling a more attractive option for environmentally conscious companies. Technology enables recycling facilities to collect and analyze data on their processes. This data-driven approach helps identify areas for improvement, optimize operations, and reduce costs. It also assists in meeting sustainability goals by minimizing waste and resource consumption. Technology provides supply chain visibility, allowing businesses to track the journey of their recycled materials. This transparency helps ensure the authenticity of recycled content, which is crucial for companies aiming to meet sustainability targets and provide verifiable eco-friendly products. Technological advancements in communication and outreach tools allow recycling programs and environmental organizations to engage with consumers effectively. Apps, websites, and social media platforms are used to educate the public about proper recycling practices, encouraging participation and reducing contamination.

E-Commerce and Packaging Industry

E-commerce relies heavily on packaging materials to protect products during shipping and delivery. The growing popularity of online shopping has led to a substantial increase in packaging demand. Corrugated cardboard boxes, one of the primary products made from recovered paper, are widely used for shipping goods purchased online. This surge in demand directly boosts the consumption of recovered paper. Both consumers and e-commerce businesses are becoming more environmentally conscious. Sustainable packaging is a key trend, and recovered paper is seen as an eco-friendly choice. E-commerce companies are increasingly opting for recycled and recyclable packaging materials, which includes boxes, inserts, and wrapping made from recovered paper.

E-commerce businesses often require customized packaging solutions to accommodate various product shapes and sizes. Recovered paper is versatile and can be easily molded into different forms, making it suitable for creating custom packaging solutions tailored to the needs of online retailers. Recovered paper is cost-effective compared to some other packaging materials. E-commerce companies, especially smaller businesses, find it economically advantageous to use recycled paper products for their packaging needs. This cost efficiency is a significant driver for the adoption of recovered

paper in the packaging industry. Consumers increasingly expect their online purchases to arrive in sustainable and recyclable packaging. Brands that meet these expectations by using recovered paper packaging can enhance their reputation and appeal to environmentally-conscious customers.

Circular Economy Initiatives

Circular economy initiatives emphasize the importance of recycling as a means to reduce waste and conserve resources. Recovered paper is a prime example of a material that can be recycled multiple times without significant loss of quality. As such, circular economy principles encourage the recycling of paper products, boosting the demand for recovered paper. Circular economy initiatives aim to minimize the consumption of virgin resources, such as trees for paper production. By using recovered paper as a feedstock, the paper industry reduces its reliance on virgin pulp, contributing to resource conservation.

Circular economy principles advocate for designing products and packaging with recycling in mind. Manufacturers are encouraged to use materials that are easily recyclable, which includes paper products made from recovered paper. This drives the demand for such products and encourages their incorporation into the supply chain. Circular economy initiatives promote closed-loop systems where materials are continually recycled and reused. Recovered paper is a prime candidate for closed-loop recycling because it can be collected, processed, and transformed into new paper products repeatedly. This closed-loop approach reduces the need for raw materials and minimizes waste. Circular economy initiatives encourage collaboration across industries, including packaging, manufacturing, and recycling. Businesses are encouraged to work together to find innovative ways to incorporate recovered paper into their processes, fostering a more sustainable and interconnected economy.

Key Market Challenges

Contamination Issues

Contaminants in recovered paper reduce the quality of recycled paper products. For instance, food residue can stain and degrade paper fibers, making them less suitable for high-quality paper and packaging products. Higher contamination levels can lead to an increased proportion of lower-grade paper in the recycling stream. This results in recycled paper with reduced strength, printability, and appearance, which may not meet the quality standards required by manufacturers. Removing contaminants from

recovered paper requires additional processing steps and equipment. Recycling facilities must invest in sorting and screening technologies to separate paper from non-paper materials effectively. The extra effort and resources required to reduce contamination increase the operational costs of recycling facilities. These costs can be a significant burden for recyclers, affecting their profitability and economic viability. Contaminants can damage recycling equipment and machinery, leading to increased maintenance and downtime. The presence of non-paper materials can cause jamming, wear and tear, and the need for more frequent equipment repairs.

Availability of Alternative Treatments

China was historically one of the largest importers of recovered paper from the United States. However, in recent years, China has implemented stricter import policies, such as the 'National Sword' policy and the 'Blue Sky' policy, which set stringent contamination limits and banned certain types of recovered paper imports. These policies have significantly reduced the volume of recovered paper that can be exported to China, leading to a surplus of recovered paper within the United States. The shift in China's import policies has not only affected exports to China but also caused disruptions in other global recycling markets. Many countries have followed China's lead and imposed similar restrictions on recovered paper imports. The shifting global recycling markets have led to increased volatility in the recovered paper market. Prices and demand for recovered paper can fluctuate significantly due to changes in export regulations, tariffs, and shifting trade patterns.

Key Market Trends

Increased Sustainability Awareness

One of the most significant trends in the US recovered paper market is the surge in sustainability awareness. Consumers, businesses, and governments are increasingly recognizing the environmental benefits of using recycled paper products. This trend is driven by concerns about deforestation, climate change, and a desire to reduce the carbon footprint of paper production. High-profile environmental events and crises, such as natural disasters, wildfires, and extreme weather events, have brought the reality of climate change and environmental degradation to the forefront of public consciousness. These events serve as stark reminders of the need for sustainability. Scientific findings, including reports from organizations like the Intergovernmental Panel on Climate Change (IPCC), have provided irrefutable evidence of the negative impacts of human activities on the planet. This scientific consensus has helped raise awareness.

Extensive media coverage, documentaries, and social media have played a crucial role in disseminating information about environmental issues. High-profile activists and advocates have amplified the message of sustainability to a global audience.

E-commerce Boom and Packaging Demand

One of the most prominent developments in the US recovered paper market has been the exponential growth of e-commerce. The COVID-19 pandemic accelerated the shift to online shopping, leading to an unprecedented demand for packaging materials, particularly corrugated cardboard made from recovered paper. As e-commerce continues to flourish, the need for sustainable packaging solutions is driving the demand for recovered paper in the US. The e-commerce industry has experienced explosive growth in recent years, especially accelerated by the COVID-19 pandemic. As more consumers turn to online shopping for convenience and safety, there has been a surge in the volume of packages being shipped across the country. Each online purchase typically requires packaging materials such as corrugated cardboard boxes, bubble wrap, packing peanuts, and paper-based fillers. This increased volume of e-commerce orders has directly translated into higher demand for packaging materials, including recovered paper products.

Segmental Insights

Grade Insights

In the United States, the market for recovered paper is divided into various grades, each with its own characteristics and recycling applications. These grades help facilitate the recycling process and ensure that the recovered paper is used in the most appropriate and efficient manner. Here are more detailed descriptions of some common grades of recovered paper in the US market. OCC is the most widely recycled paper grade in the US. It primarily includes used corrugated cardboard boxes used for shipping and packaging. It is a valuable source of fiber for producing new corrugated boxes and other paper products. Mixed paper is a category that includes various types of paper and paperboard. It often contains a mix of magazines, newspapers, office paper, junk mail, and other paper products. Hard mixed paper includes a mix of paper and paperboard materials.

Type Insights

US recovered paper market is a dynamic and multifaceted industry that plays a crucial

role in recycling and supplying raw materials to the paper and packaging sectors. Within this market, two prominent and essential segments are containerboard and tissue paper. Containerboard forms the basis for corrugated boxes and packaging materials, while tissue paper encompasses a range of products from facial tissue to toilet paper. Containerboard, also known as corrugated paperboard, is a heavyweight paper primarily used in the production of corrugated boxes and packaging materials. It is the backbone of the packaging industry, providing the structural integrity needed to protect and transport a wide range of goods. The recovered paper market in the US supplies a significant portion of the fiber required for containerboard production. Old Corrugated Containers (OCC) are the primary source of recovered fiber for this segment. As e-commerce continues to thrive and the demand for sustainable packaging materials rises, the importance of OCC and containerboard production grows.

Regional Insights

United States recovered paper market is a complex and diverse industry with regional variations influenced by factors such as population density, industrial activity, recycling infrastructure, and economic conditions. The West Coast, including states like California, Oregon, and Washington, has a robust recycling culture and infrastructure. High population density and a strong focus on sustainability drive demand for recovered paper. The proximity to major ports facilitates the export of recovered paper to overseas markets, particularly in Asia.

The Midwest, which includes states like Illinois, Ohio, and Michigan, has a significant manufacturing presence, contributing to the demand for recovered paper for packaging and industrial applications. The region's paper mills rely on recovered paper as a key raw material for containerboard production. The Great Lakes region provides access to water transport, making it convenient for shipping recovered paper. The Northeast, comprising states like New York and Pennsylvania, has a mix of urban and rural areas, leading to varying recycling practices. Cities with high population density often have well-established recycling programs, while rural areas may have limited access to recycling facilities.

Key Market Players

International Paper

Westrock Co

Pratt Industries, Inc.

Sonoco Products Company

Cascades Inc

Packaging Corp Of America

Koch

Report Scope:

In this report, the United States Recovered Paper Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

United States Recovered Paper Market, By Grade:

Low Grade Paper

High Grade Paper

Brown Paper

Others

United States Recovered Paper Market, By Type:

Printing & Writing Paper

Newsprint

Tissue

Containerboard

United States Recovered Paper Market, By End User Industry:

Food & Beverage

Electrical & Electronics

Automotive

Pharmaceuticals

Others

United States Recovered Paper Market, By Region:

Northeast Region

Midwest Region

West Region

South Region

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the United States Recovered Paper Market.

Available Customizations:

United States Recovered Paper Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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