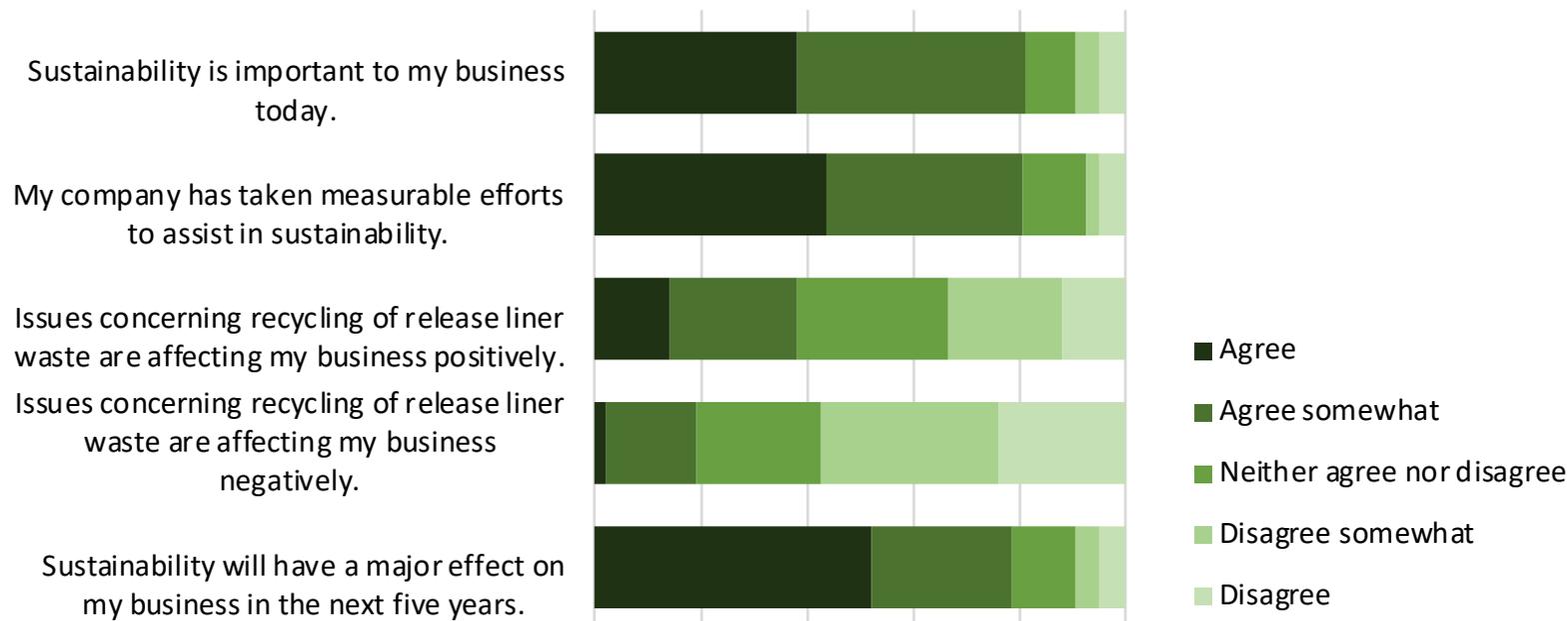




SUSTAINABILITY & RECYCLING SESSION

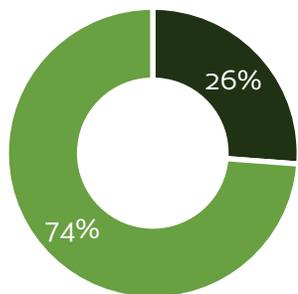


SUSTAINABILITY & ENVIRONMENT

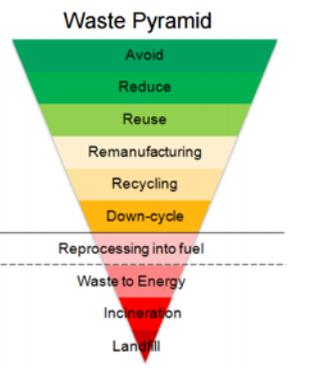
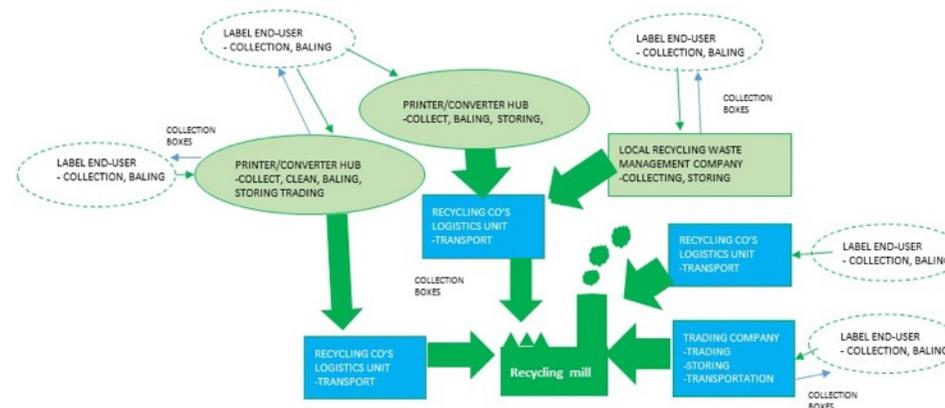


LINER & MATRIX WASTE

Release Liner Recycling Program



- Yes
- No



“THE SCALE OF TODAY'S ENVIRONMENTAL CHALLENGES IS UNPRECEDENTED, REQUIRING THE POWER OF COLLABORATION ACROSS THE VALUE CHAIN TO ACCELERATE THE PACE OF CHANGE AND FIND NEW ANSWERS”

Renaë Kezar,
Sr. Director, Global Leader of Sustainability
Avery Dennison









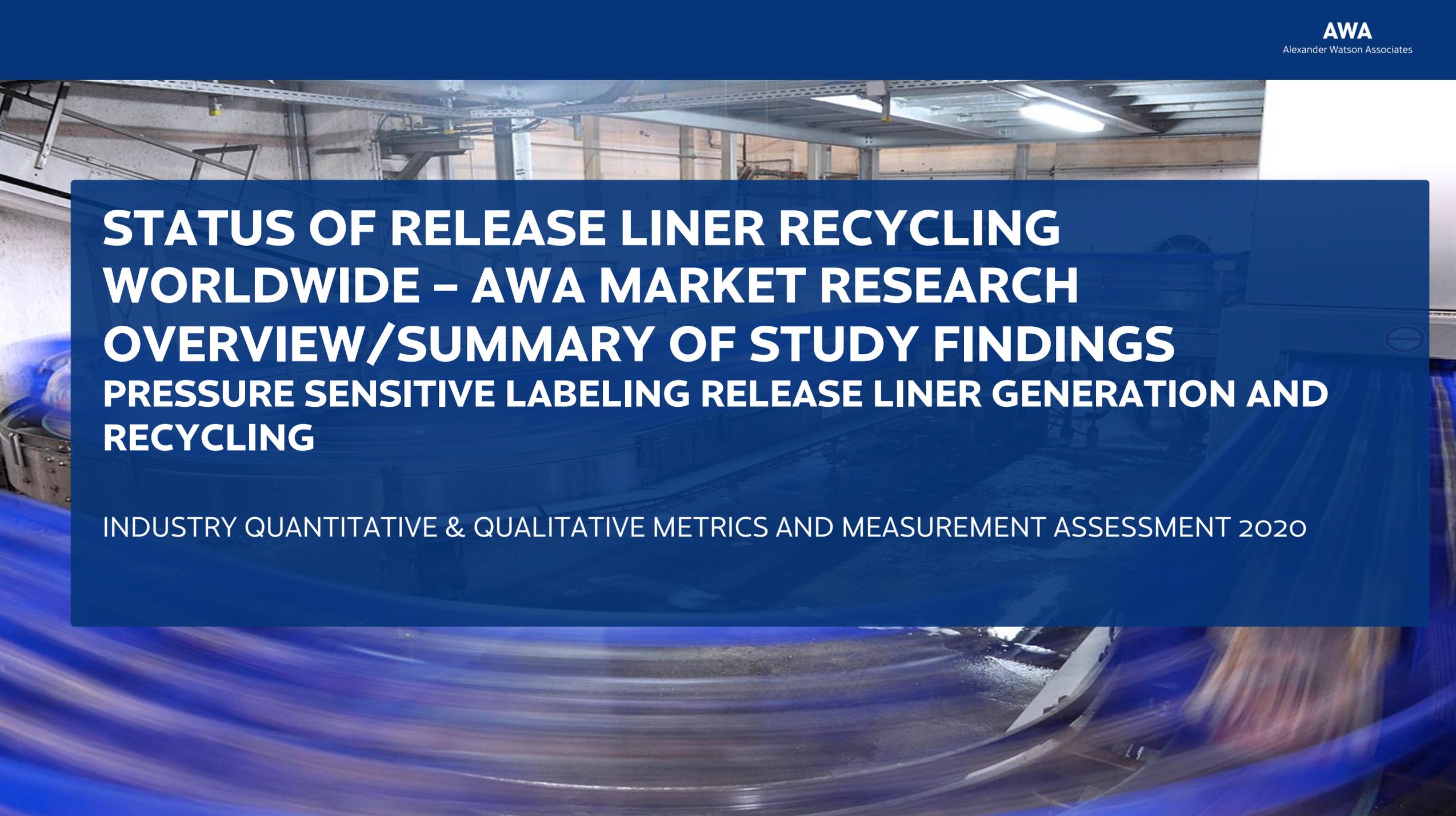






- **Status of Release Liner Recycling Worldwide – AWA Market Research Overview/Summary of Study Findings**
 - Corey M. Reardon, President & CEO, AWA Alexander Watson Associates
- **Consortium – Introduction, Purpose, Path Forward**
 - Jurgen Van der Donck, Sales & Business Development Director, Release Liner, Mondi
 - Renae Kezar, Senior Director, Global Sustainability, Avery Dennison
- **Status Recycling Silicone Coated Materials – Technical Considerations – Technical White Paper**
 - Alexander Knott, Senior TS&D, Dow
- **Overview of Consortium: Global Steering Committee and Regional Initiatives**
 - Paul Nathanson, Senior Principal, Bracewell
- **Panel – Round Table Discussion – Consortium - Q&A**
- **Conclusions & Seminar Close**





**STATUS OF RELEASE LINER RECYCLING
WORLDWIDE – AWA MARKET RESEARCH
OVERVIEW/SUMMARY OF STUDY FINDINGS
PRESSURE SENSITIVE LABELING RELEASE LINER GENERATION AND
RECYCLING**

INDUSTRY QUANTITATIVE & QUALITATIVE METRICS AND MEASUREMENT ASSESSMENT 2020

Key Deliverables

- Quantitative Estimates & Comprehensive Breakdown of Release Liner Volumes
- Quantitative Estimates & Breakdown of Volumes by Disposition
- Estimations of Release Liner Volumes Regionally and Globally
- Create Benchmark Data and Standardized Metrics



Project Scope & Methodology



Data Collection & Analysis Process

AWA's Skills and Resources

- 50 years experience of market share and industry expertise,
- Highly regarded technical and market analysts
- Extensive database of information and contacts built up over many years,
- Highly connected through our events and conferences

Primary Research

- Over 500 direct interactions & exchanges per year through our event and conferences,
- Over 160 interviews with key industry participants, subject-matter experts, C-level executives of key players, and industry consultants,
- Online survey responses.

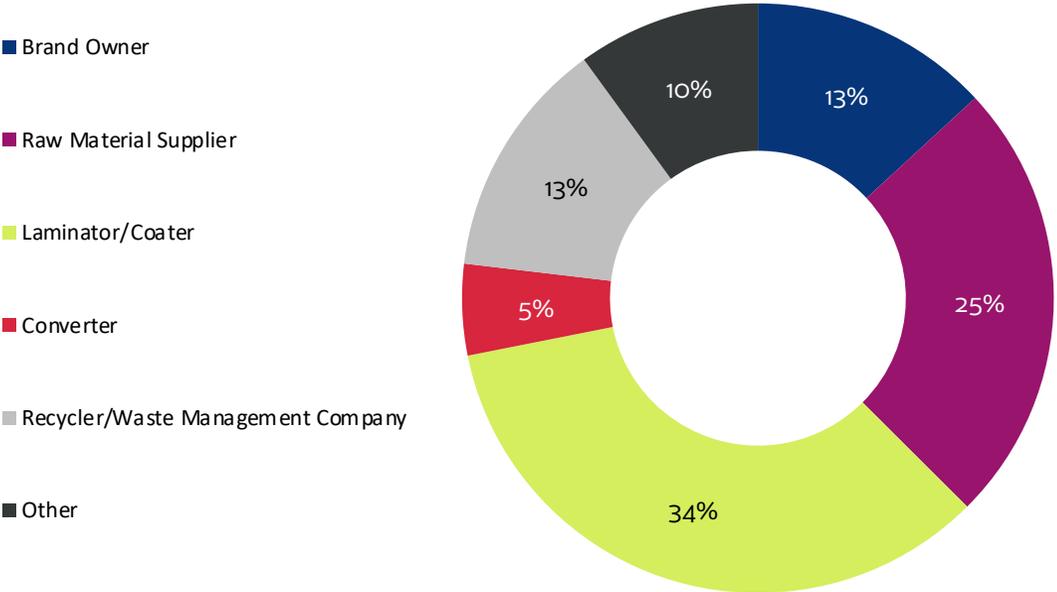
Secondary Research

- Existing AWA's knowledge capital, statistics and industry data,
- Surveys from FINAT, TLMI, etc.
- Resources, directories, and databases (such as Bloomberg, Businessweek, Pitchbook and OneSource).

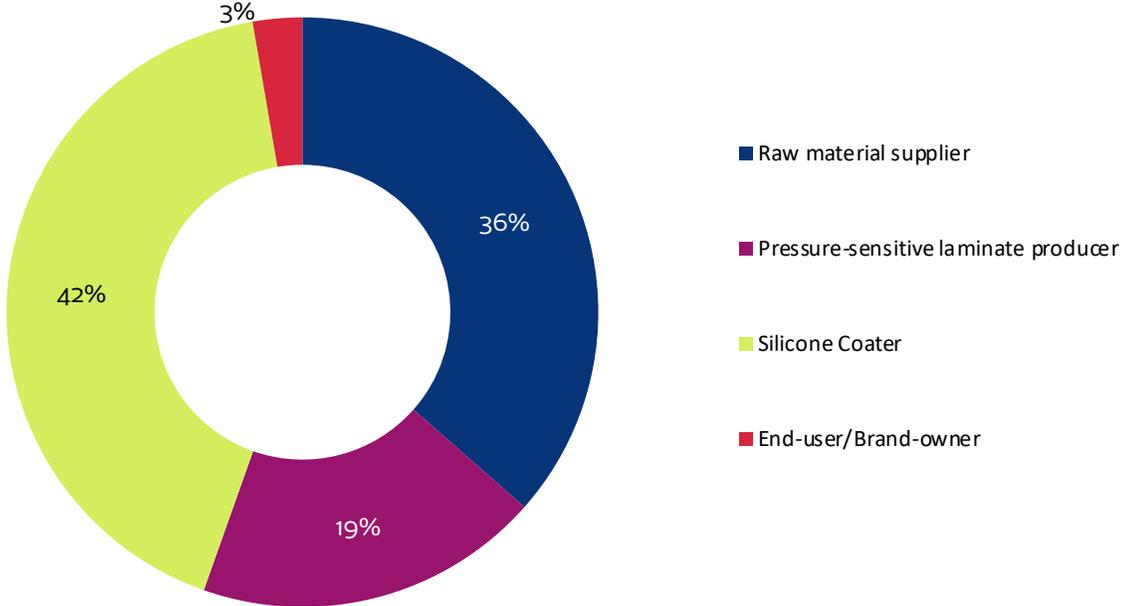


Project Scope & Methodology - Interview and Survey Statistics

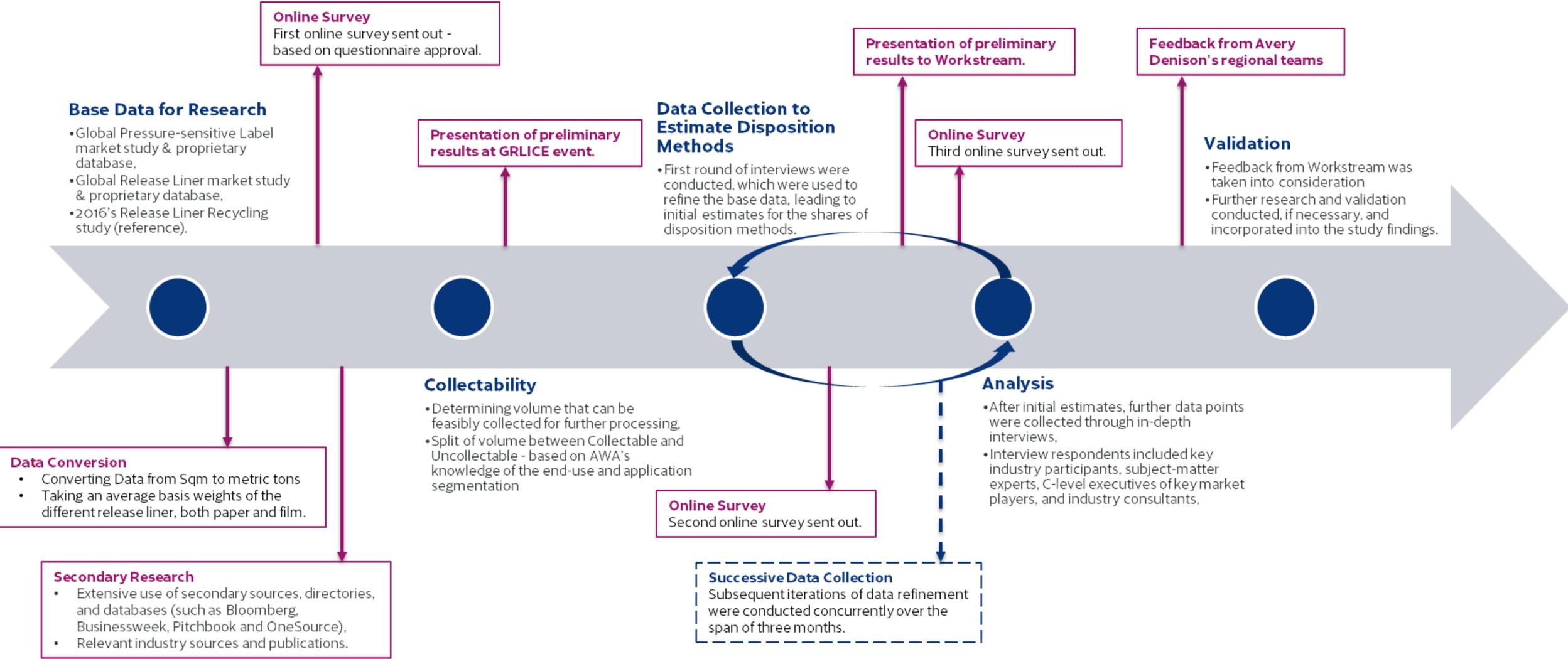
Interviews by Position in the Value Chain (160)



Online Survey by Position in the Value Chain (72)

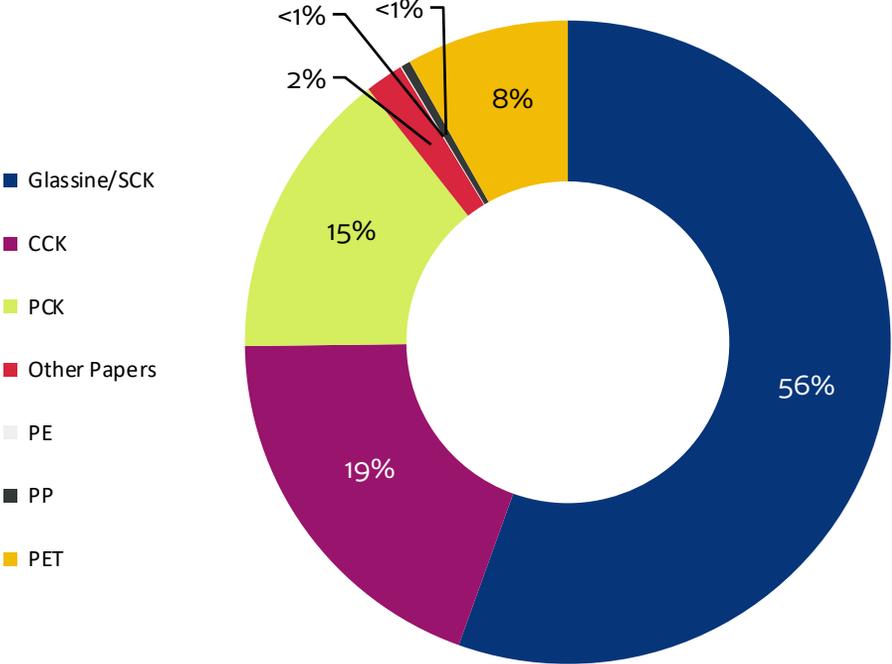


Data Collection & Analysis Process

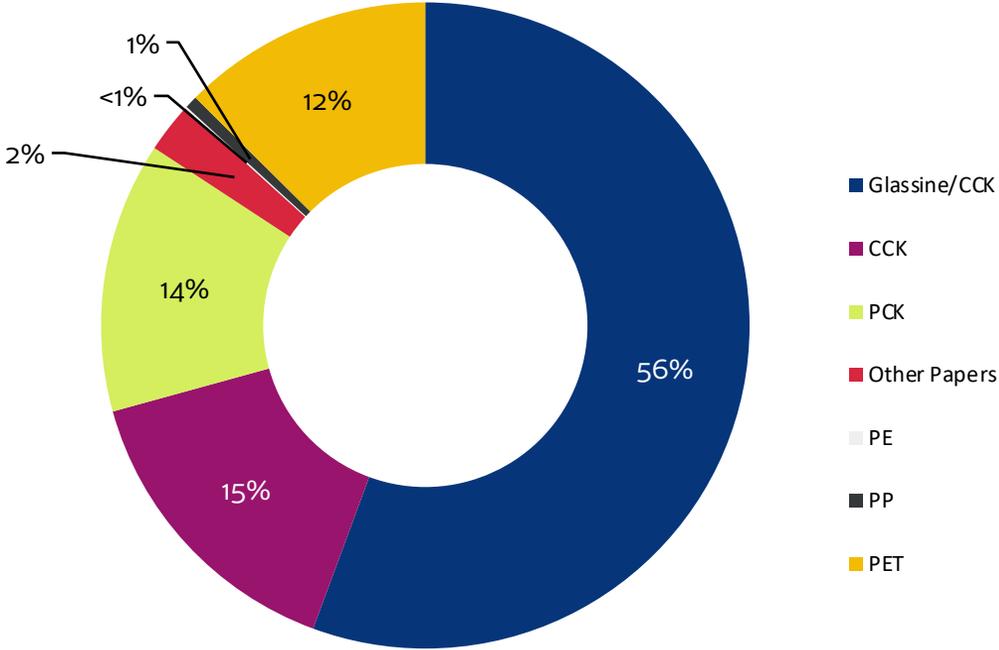


Global Release Liner Market - Generation & Recycling Overview

Global Label Release Liner By-Product by Material
1,622,960 T

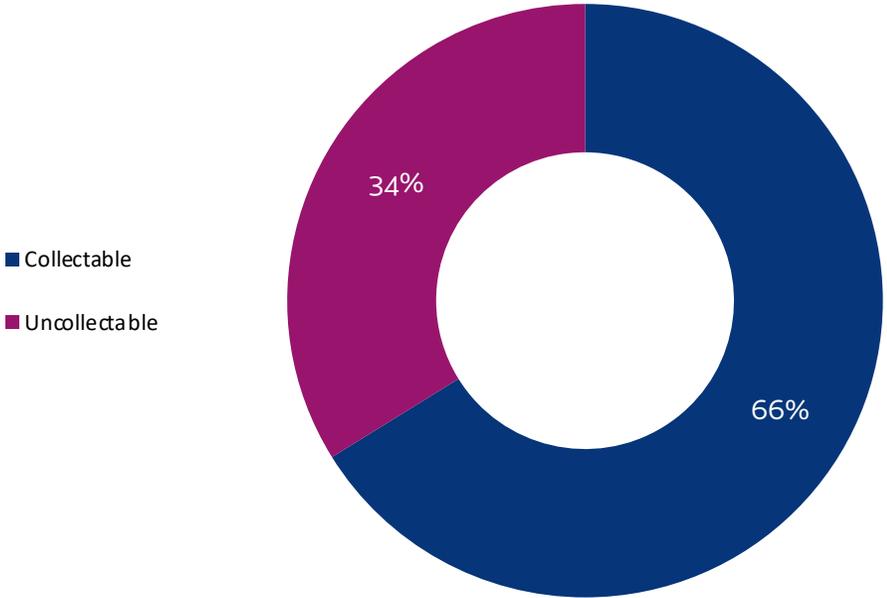


Global Label Release Liner By-Product by Material
26,490 mln sqm

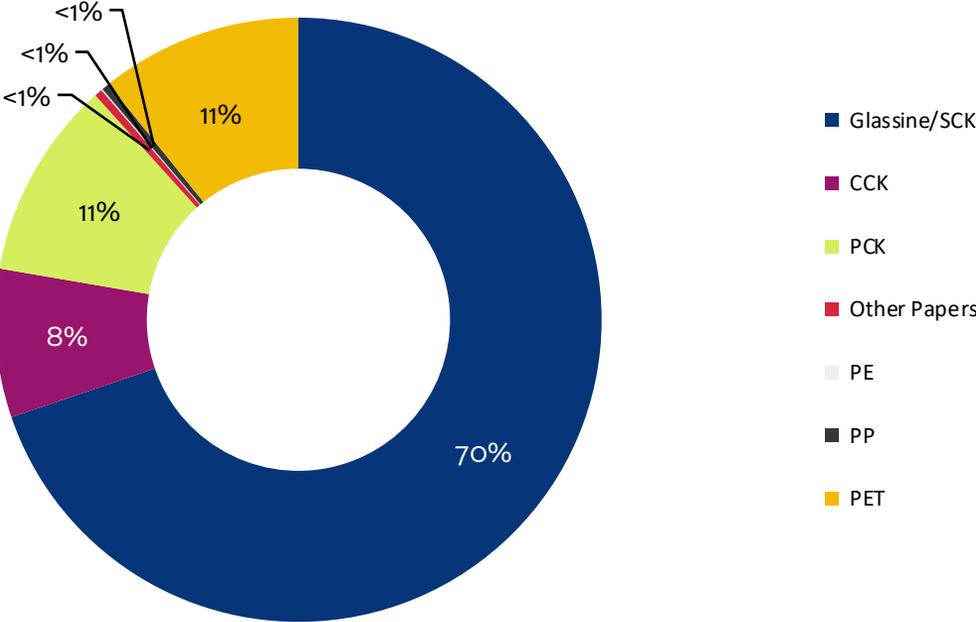


Global Collectable vs Uncollectable by Material

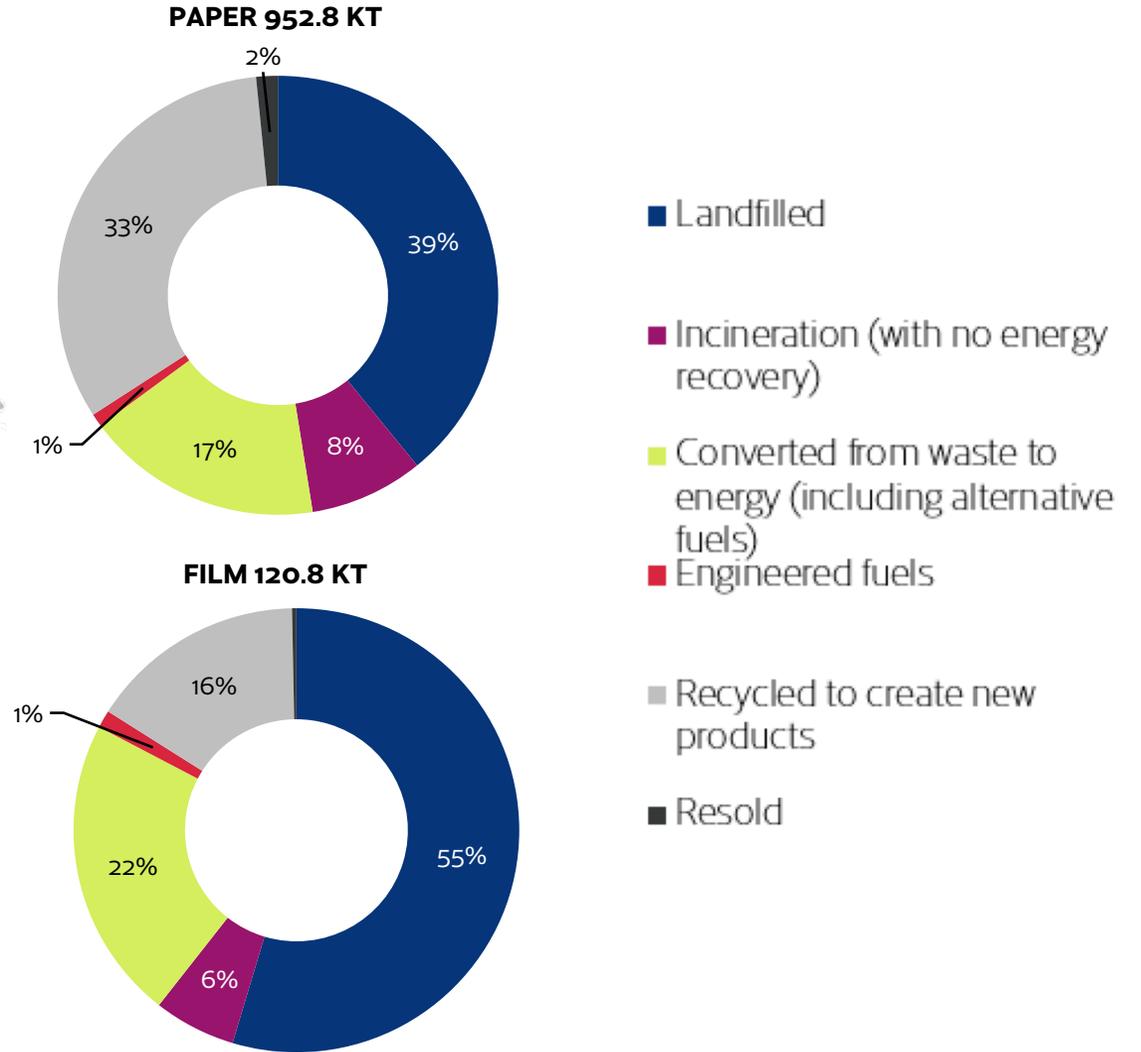
Global Collectable vs Uncollectable
1,622,960 T



Collectable Label Release Liner by Material
1,073,820 T



Global Release Liner By-Product 2019

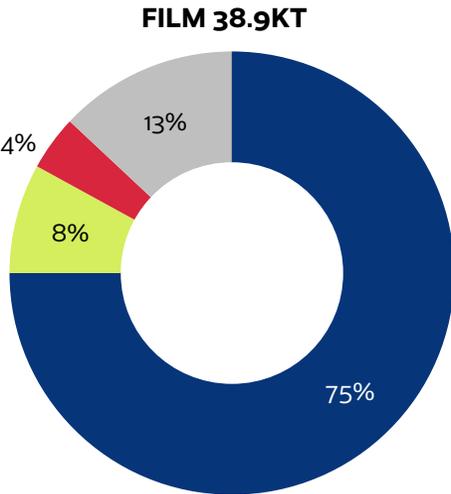
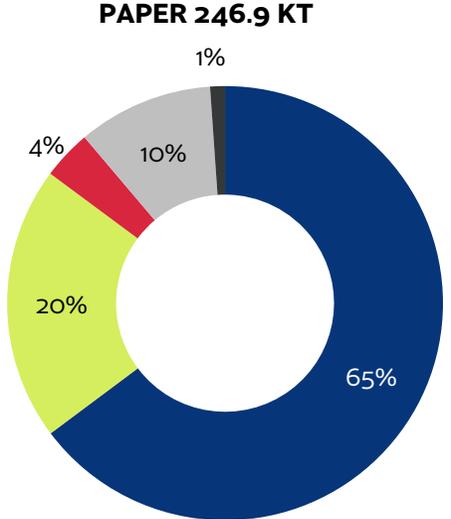


Changes in Release Liner Disposition

		Global	North America	Europe	Asia	South America
Landfilled		↓	↓	↓	↓	↑
Incineration (with no energy recovery)		↓	Unchanged	Unchanged	↓	Unchanged
Waste to energy (including alternative fuels)		↑	↑	↑	Unchanged	Unchanged
Engineered fuels		Unchanged	↑	Unchanged	Unchanged	Unchanged
Recycled to create new products		↑	↑	↑	↑	↑



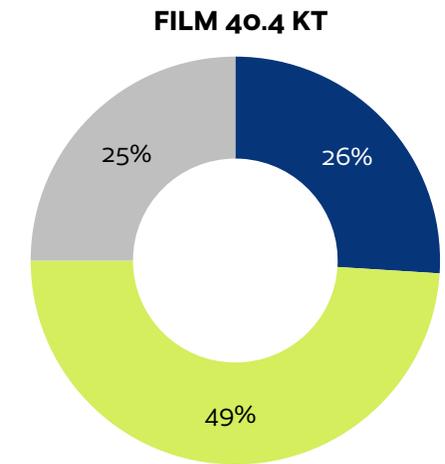
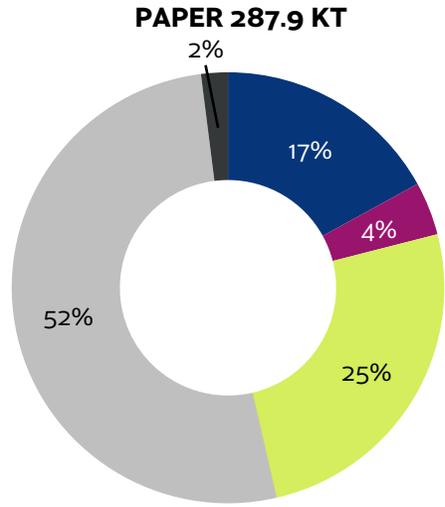
North American Release Liner By-product 2019



- Landfilled
- Incineration (with no energy recovery)
- Converted from waste to energy (including alternative fuels)
- Engineered fuels
- Recycled to create new products
- Resold



European Release Liner By-product 2019



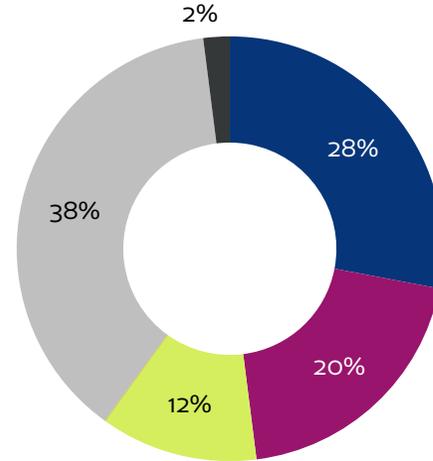
- Landfilled
- Incineration (with no energy recovery)
- Converted from waste to energy (including alternative fuels)
- Engineered fuels
- Recycled to create new products
- Resold



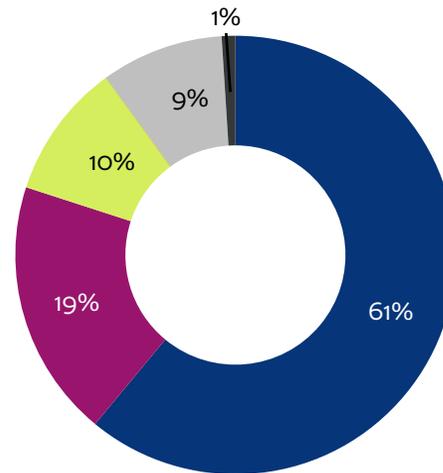
Asian Release Liner By-product 2019



PAPER 332.3 KT



FILM 37.8 KT



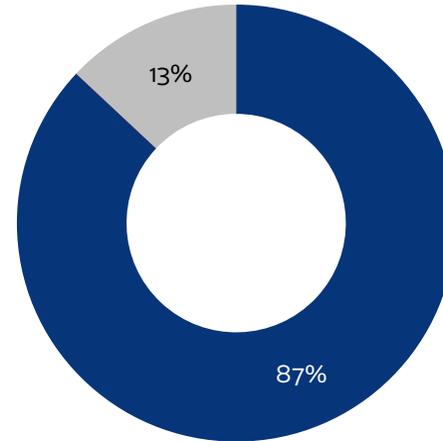
- Landfilled
- Incineration (with no energy recovery)
- Converted from waste to energy (including alternative fuels)
- Engineered fuels
- Recycled to create new products
- Resold



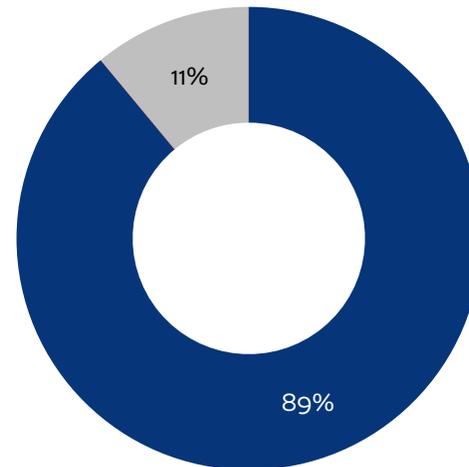
South American Release Liner By-product 2019



PAPER 53.1 KT



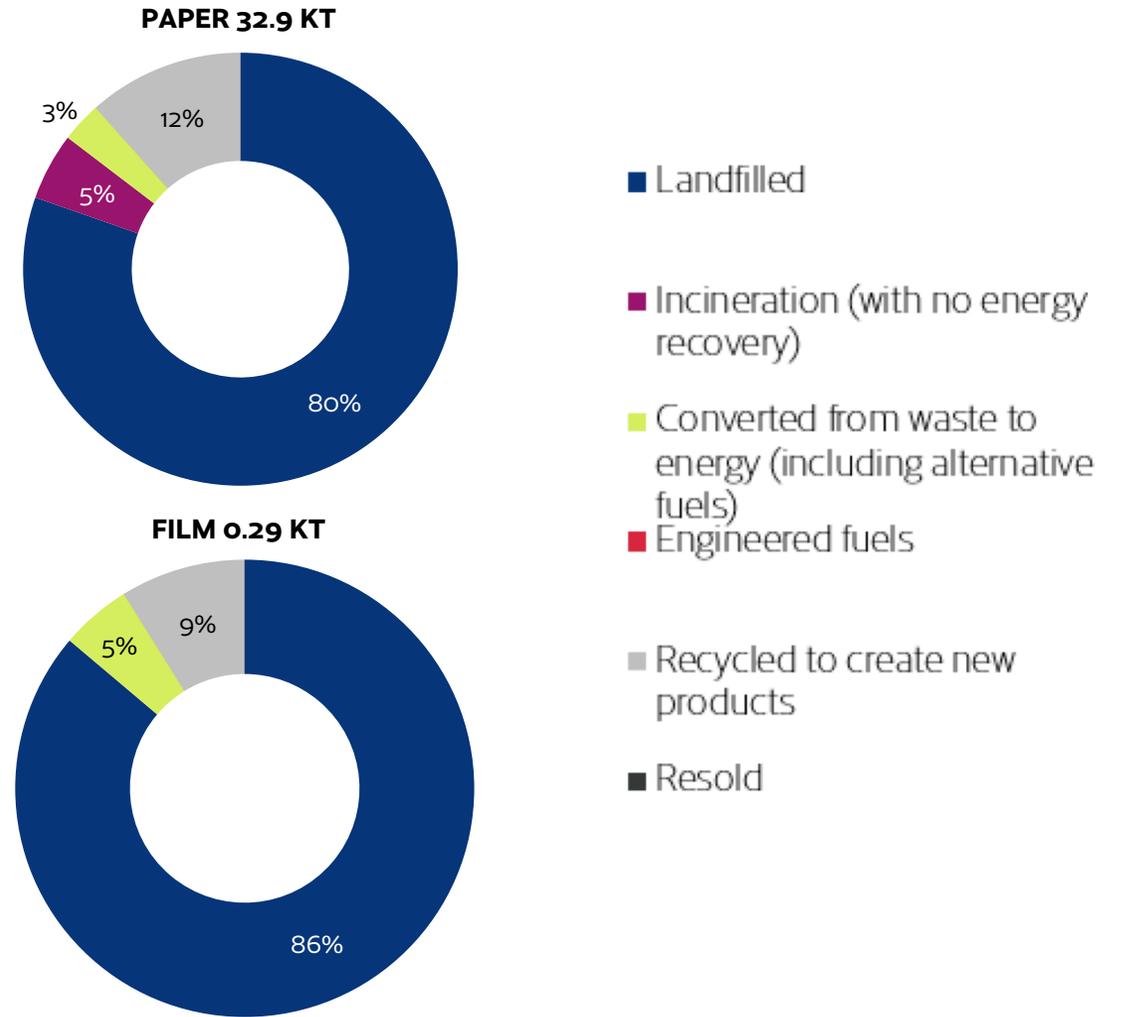
FILM 3.3 KT



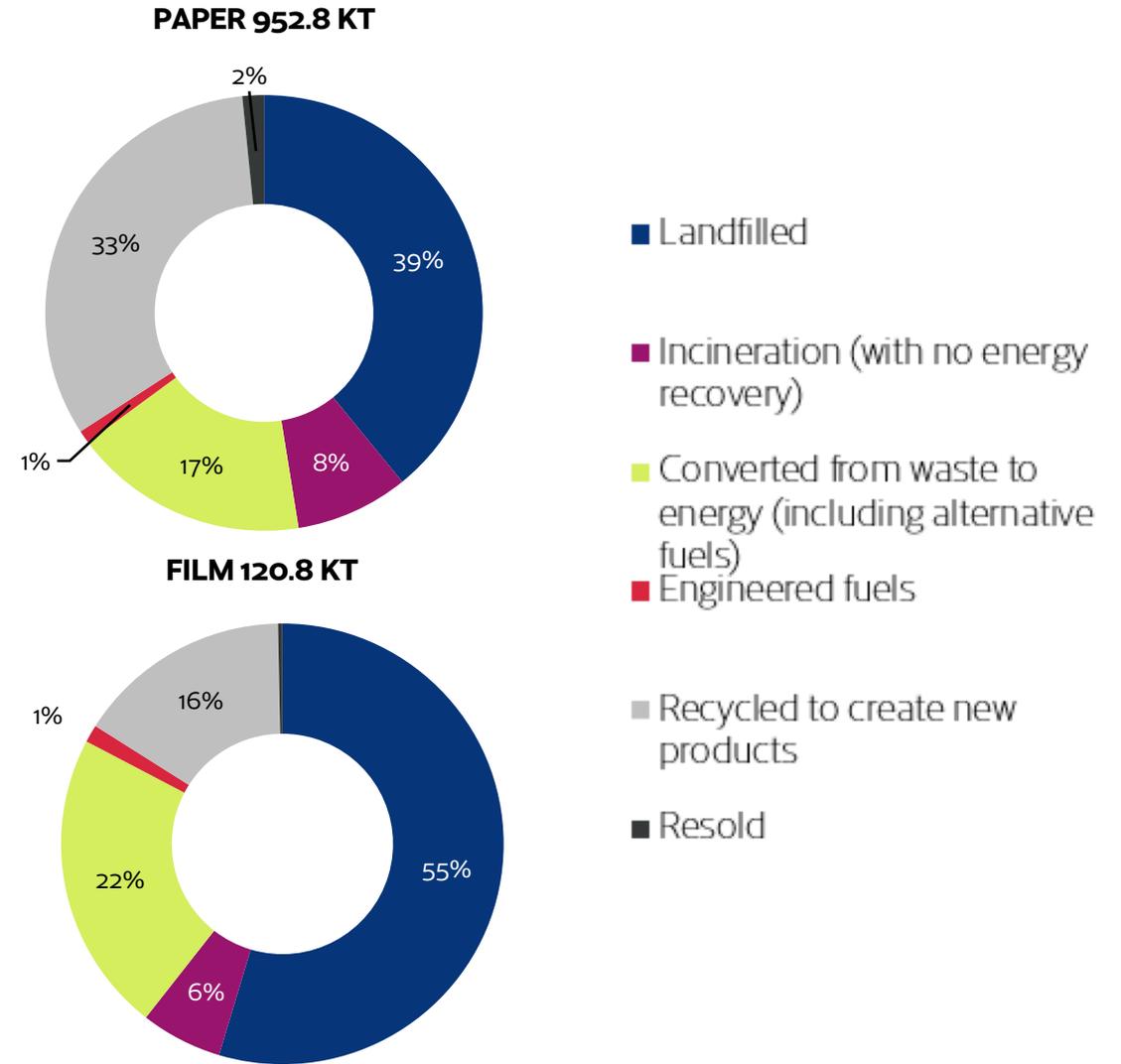
- Landfilled
- Incineration (with no energy recovery)
- Converted from waste to energy (including alternative fuels)
- Engineered fuels
- Recycled to create new products
- Resold



Africa & Middle East Release Liner By-product 2019



Global Release Liner By-Product 2019



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