

Commodities Markets & Prices: Impacts on State Economies & the Environment

**National Lt. Governors Association Federal-State Meeting
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Washington, D.C.**

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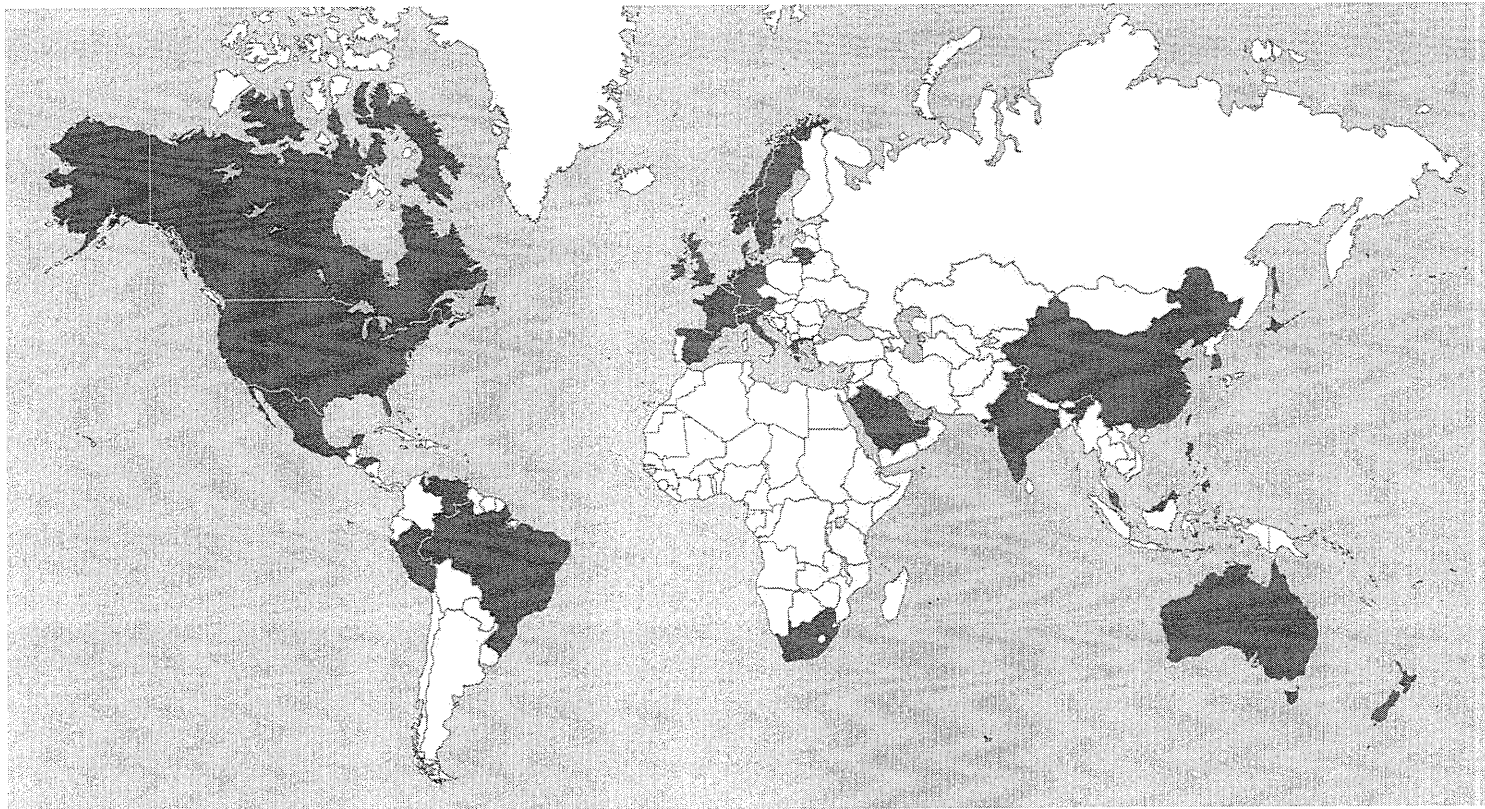


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Scrap Recycling
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ISRI: Voice of the Recycling Industry



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1,300+

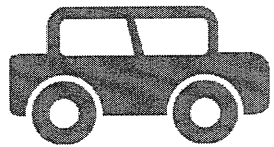
Member
companies

4,000+

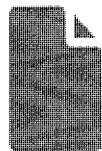
Recycling facilities
worldwide

34

Countries



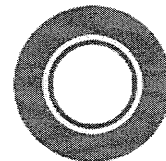
Ferrous & non-ferrous metals



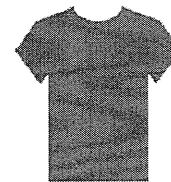
Paper



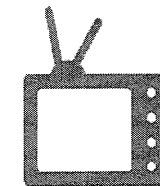
Plastics



**Tire &
Rubber**



Textiles



Electronics

Jobs Supported by the U.S. Scrap Recycling Industry, 2015*



*Source: "Economic Impact Study U.S.-Based Scrap Recycling Industry," John Dunham and Associates, 2015.

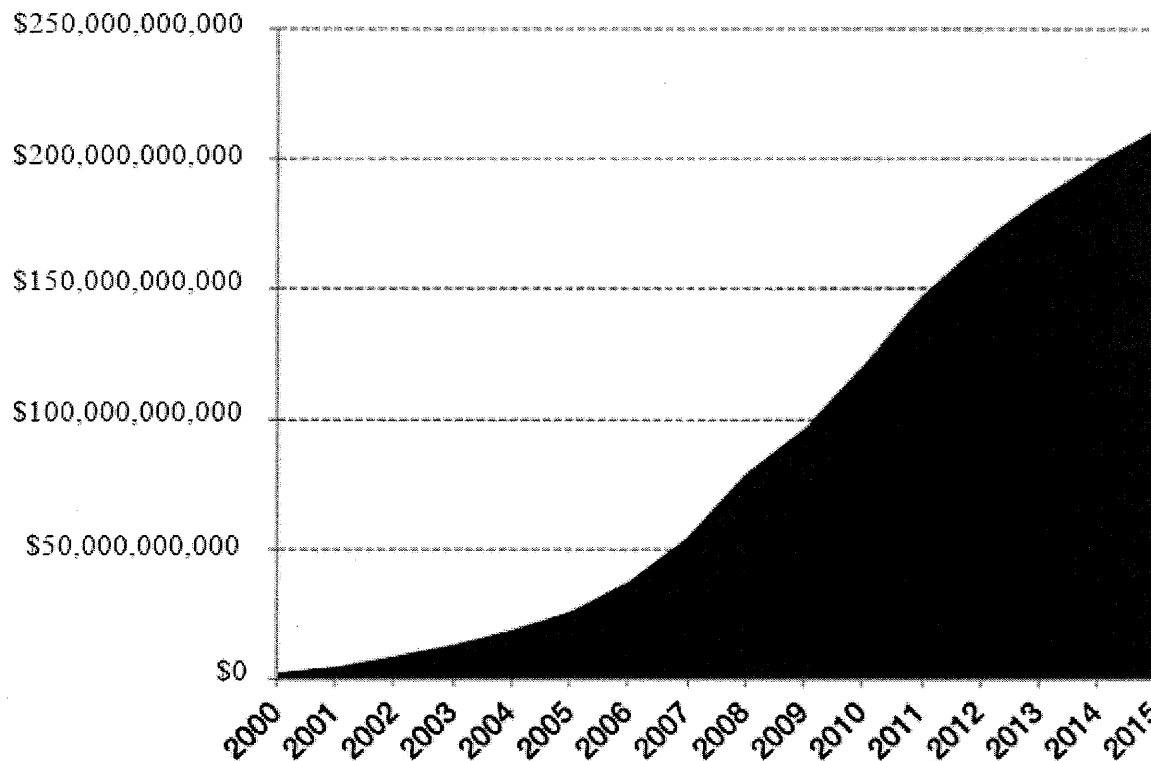
Globalization of the Scrap Market



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With between 30 & 40% of all scrap processed in US destined for export each year, the health of the US recycling industry is directly tied to the health of the global economy

Cumulative Impact of Net U.S. Scrap Exports on U.S. Trade Balance Since 2000 (\$)



Source: US Census Bureau/US International Trade Commission

The Global Industry

40

Total exported
(million metric tons)

\$21 B

Value of materials
exported

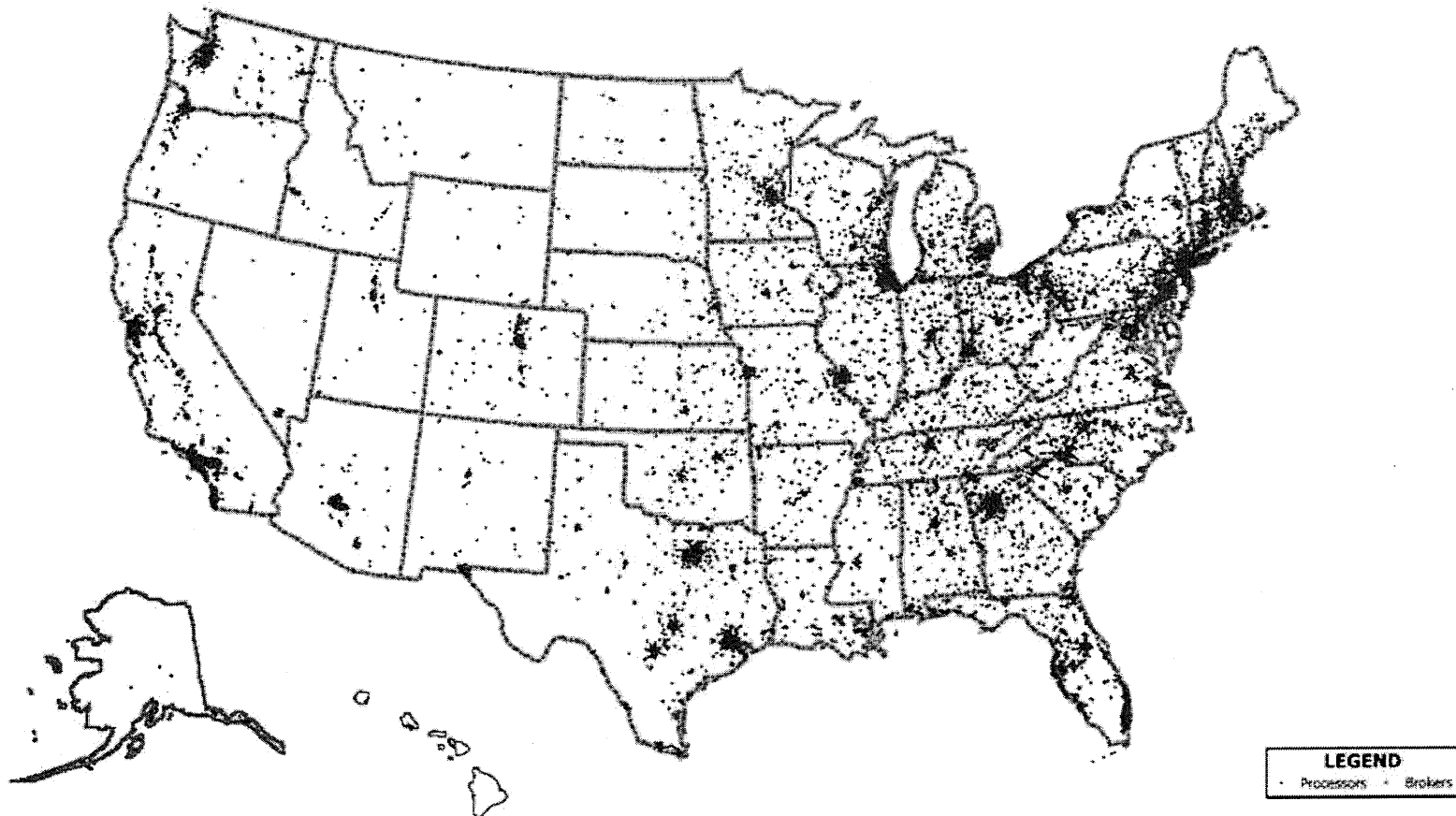
160

Destination countries
where recyclables are sold

State Implications: Economy, Jobs & Recycling Markets

Where Are U.S. Scrap Recycling Facilities Located?

U.S. Census Bureau data show that there are more than 8,000 recycling facilities operating in the United States.



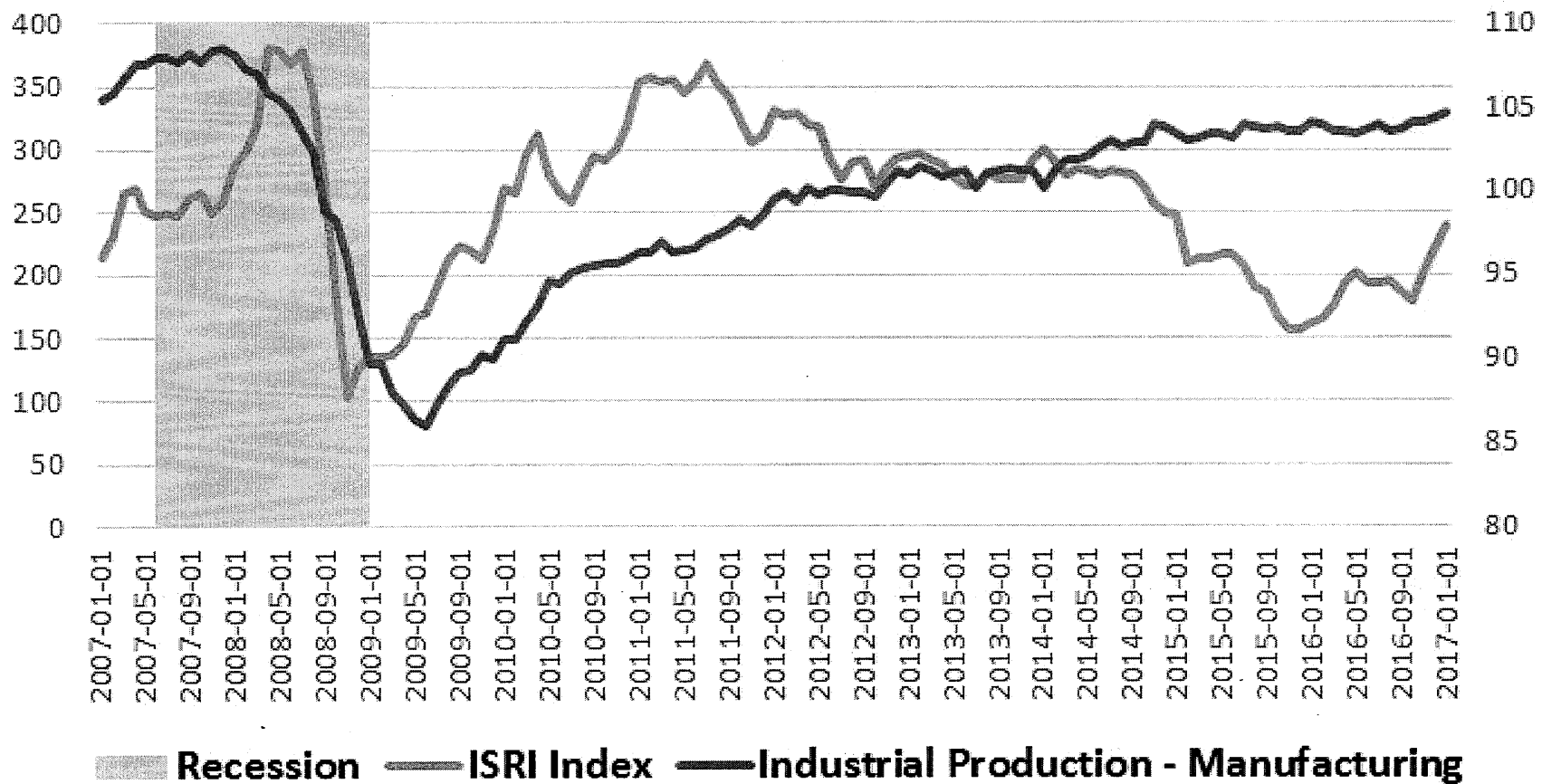
State Implications: Recycling & Manufacturing Markets



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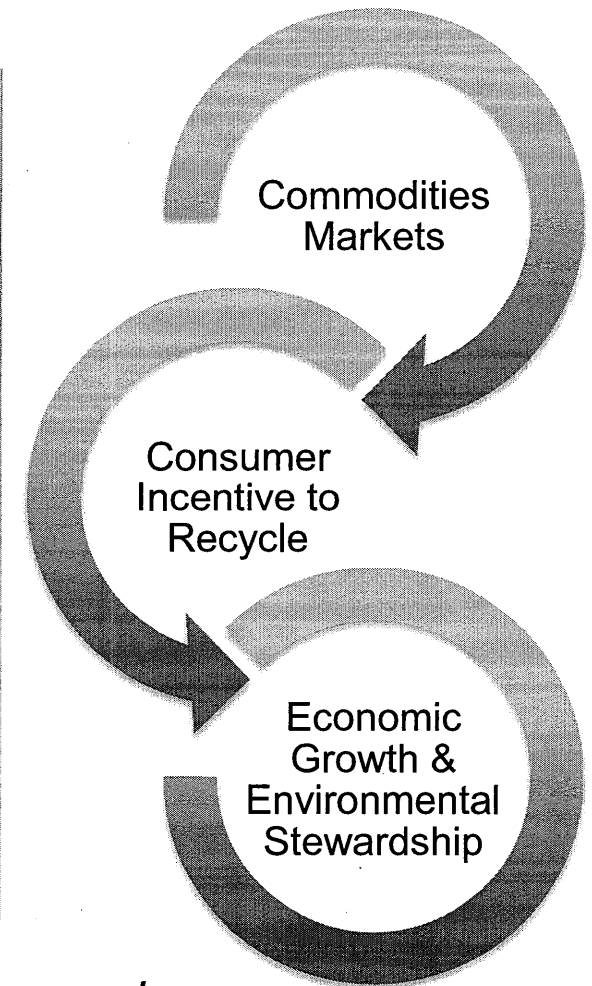
U.S. Manufacturing and the ISRI Index, Jan 2007-Jan 2017

Sources: Federal Reserve, ISRI



State Implications: Commodities & Environment

Commodities markets = recycling incentives = sustainable solutions



Good News: Recycling is Not Dead

Developing new markets and promoting free trade will be critical going forward

- **Hopes for upturn in 2017:** Hints at rising commodity prices
- **Political/Government Factors:** Markets are impacted by the health of manufacturing industries, corporate tax rates, infrastructure spending, regulatory burdens, trade and protectionist foreign policies
- **Heightened uncertainty** about future policy changes and unintended consequences of protectionist measures are significant concerns

Questions?