Paper Recovery Alliance & Plastics Recovery Group:
Working to Increase the Recovery of Foodservice Packaging
The Challenges

• Too little foodservice packaging is being recovered after use for a variety of reasons…
  • Limited end markets for paper and plastic FSP
  • Unwillingness to recover FSP because of real and perceived barriers
  • Cost of recovery versus value of recovered material
  • Consumer perceptions of, engagement with and access to foodservice packaging recovery

• No one company has enough volume or influence to effect broad change alone
The Opportunity

• Work collaboratively to develop and promote economically viable and sustainable recovery solutions for used foodservice packaging

• Show that voluntary, industry-based recovery initiatives work...and that new government-mandated solutions are not needed
Formation of Recovery Groups

- Paper Recovery Alliance (PRA) and Plastics Recovery Group (PRG) formed in 2011-2012
  - Housed within the industry's trade association, the Foodservice Packaging Institute
  - Funding comes from PRA/PRG members
  - Members include the entire value chain, from raw material suppliers through foodservice operators
Current PRA/PRG Members
Identifying the Key Stakeholders

• To get foodservice packaging recovered…
  • Residents need to know they should put FSP in their recycling/composting bins
  • Communities must be interested in expanding their recycling/composting programs to include FSP
  • Material recovery facilities, recycling end markets and composters must be able to process FSP and sell a marketable product

• Therefore, these are the key stakeholders, and the focus of the PRA/PRG’s efforts.
Accomplishments (So Far!)
Questions We’ve Answered

<table>
<thead>
<tr>
<th>Year</th>
<th>Questions</th>
<th>Studies/Findings</th>
</tr>
</thead>
</table>
| 2012 | Is food residue a problem?  
Is food residue a problem?  
- Food Residue Study (Boston)  
- Food Residue Study (Delaware) | Found little to no difference between FSP versus other commonly recycled food packaging  
How will FSP impact the bale?  
Estimated impact |
| 2013 | Where is the material available to be collected?  
Learned curbside had greatest volume for collection | |
| 2014 | Will the material flow to the right bale?  
Co-sponsored MRF Material Flow Study | |
| 2015 | How much FSP arises in bales?  
- Analyzed mixed paper bales in Seattle and NYC  
- Co-sponsored Rigid Plastics Bale Audit | |
| 2016 | What messaging is clearest for residents?  
Conducted National Resident Messaging Survey | |
| 2017 | How to add FSP to city's materials?  
Developed image library, flyers, ads, video, best practice language | |
| 2018 | How does compostable FSP contribute as a feedstock?  
Found compostable FSP provided the same benefit as traditional carbon / bulking materials | |

Overviews of studies available at www.recycleFSP.org.
Community Partners
(Added foodservice packaging to residential recycling programs)

- **2017**: Chattanooga, TN
- **2017**: Louisville, KY
- **2017**: Washington, DC
- **2018**: Denver, CO
- **2019**: Sioux Falls, SD
2019 Work Plan
(Pretty detailed, but gives you an idea of the breadth and depth of our work!)
Increase Community Access to Recycle FSP

- Create access road map, built around end markets
- Sponsor at least 1 Community Partner
- Add access in other communities, expanding around current Community Partners and focusing on key stakeholders in Upper Midwest
- Target and engage large cities through sponsorships of organizations like the Large Urban County Caucus
- Leverage relationship with The Recycling Partnership
- Support efforts to promote robust recycling programs
Related to Recycling of Paper Foodservice Packaging

• Update internal list and external map of end markets for paper FSP; expand coverage to include Mexico

• Engage with Institute of Scrap Recycling Industries’ Paper Stock Industries to show acceptance of paper FSP is a result of diverse, market-based regional conditions

• Coordinate with FPI’s new Paper Cup Alliance (focused solely on recycling of paper cups)
Related to Recycling of Plastic Foodservice Packaging

- For PET Thermoforms: Confirm & track acceptance by new reclaimers, Western markets, export markets
- For PP: Engage with PP markets to develop messaging for communities and MRFs
- For PS: Recruit champions and launch Demand Champions module with Association of Plastics Recyclers
- Update internal list and external map of end markets for plastic FSP; expand coverage to include Mexico
- Follow Institute of Scrap Recycling Industries’ Plastics Committee for developments related to plastic FSP
Expand Composting of FSP

Identify and engage with:
- Large cities that do not offer FSP composting, even though they are near to composter(s) that accept FSP
- Composters near large cities that accept food scraps, but not FSP
- Large commercial (preferably closed venue) generators that are purchasing compostable FSP, but are not composting these items
Communications Support

- Conduct public perception survey related to recycling and composting of FSP
- Produce article(s) on results from recycling Community Partnerships and composting opportunities for FSP
- Publish semi-annual “Rolling Out Recovery” newsletters
- Host webinar related the PRA/PRG activities
- Update www.RecycleFSP.org with new case studies, etc.
- Promote PRA/PRG activities at conferences
#1 REASON:

We are the only group solely focused on getting more paper and plastic foodservice packaging recycled and/or composted – and achieving success at moving the needle.

If you want to see more foodservice packaging recovered, you should support the group working to make this happen.
#2 REASON:

You want to make claims like “recyclable” or “compostable” on foodservice packaging.

To make these claims, foodservice packaging should actually be recycled or composted. We’re the group making this happen.
Why Your Company Should Join

• Others reasons to join the PRA/PRG:
  • Demonstrate a commitment to voluntary, industry-led recovery initiatives (especially to external stakeholders like investors, environmental NGOs, customers and others)
  • Supplement your own company’s recovery and/or sustainability initiatives
  • Better understand the impact of package design on recovery
  • Be recognized as an industry leader by your customers, competitors and others
  • Gain access to valuable resources and knowledge (see next page)
PRA/PRG Resources

- [www.RecycleFSP.org](http://www.RecycleFSP.org), with sections for foodservice operators, communities, material recovery facilities (MRFs), end markets and composters/AD facilities
- 2012 Generation, dispersal and discard information on FSP, in units, pounds and tons for U.S. and Canada (updated in 2017)
- 2013 & 2014 Studies comparing food residue on FSP to recyclable food packaging
- 2013 Survey of 60+ MRFs to document acceptance of FSP
- 2014 Estimates of adding FSP to existing paper and plastic bales (updated in 2018)
- 2014 & 2015 Audits of FSP in paper and plastic bales
- 2015 Study of how FSP flows in MRFs
- 2015 Survey related to coating R&D and paper FSP
- 2016 Study of communities in the U.S. to quantify acceptance of FSP for recycling
- 2016 Survey of 1,000 residents to identify best practices related to FSP recycling education
- 2016 Literature review on impacts of FSP on composting facilities
- 2017 Studies on communities (in U.S.) and composters (in U.S. and Canada) accepting FSP
- 2018 Study on Value of FSP as Feedstock for Composters
Your Commitments

• Time Commitment in 2019:
  • Quarterly conference calls
    • February, June, August and December (Exact dates and times TBD based on member availability)
  • Semi-annual in-person meetings (in advance of FPI’s conferences)
    • Spring: April 17 in Sonoma, California
    • Fall: October 23 in Louisville, Kentucky

• Financial Commitment:
  • Annual contribution based on type of organization and sales/revenues (see next slides), prorated if company joins during the year
Financial Commitments for Material Suppliers and Converters

• Based on your company’s annual sales of/into foodservice packaging in the U.S. and Canada

<table>
<thead>
<tr>
<th>Sales</th>
<th>Contribution</th>
</tr>
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<tbody>
<tr>
<td>Under $10 million</td>
<td>$3,750</td>
</tr>
<tr>
<td>$10-99 million</td>
<td>$7,500</td>
</tr>
<tr>
<td>$100-249 million</td>
<td>$15,000</td>
</tr>
<tr>
<td>$250-500 million</td>
<td>$22,500</td>
</tr>
<tr>
<td>Over $500 million</td>
<td>$30,000</td>
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Financial Commitments for Foodservice Operators/Brands

• Based on your company’s annual sales in the U.S. and Canada

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<tr>
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</tr>
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<tbody>
<tr>
<td>Under $500 million</td>
<td>$7,500</td>
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<tr>
<td>$500-999 million</td>
<td>$11,250</td>
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<tr>
<td>$1-5 billion</td>
<td>$22,500</td>
</tr>
<tr>
<td>Over $5 billion</td>
<td>$33,750</td>
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Visit www.RecycleFSP.org

Questions?
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