



FOODSERVICE PACKAGING  
INSTITUTE®

## Paper Recovery Alliance & Plastics Recovery Group:

Working to Increase the Recovery of  
Foodservice Packaging



# Background



# 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



<p><b>How much material is available?</b> Estimated material generation</p>	<p><b>Who's recycling FSP?</b> Conducted MRF Benchmarking Study</p>	<p><b>Are there end markets for FSP?</b> Published end markets map</p>	<p><b>What are the access rates for FSP?</b> Co-sponsored SPC Centralized Study on the Availability of Recycling</p>	<p><b>Where are domestic end markets for Paper FSP?</b></p> <ul style="list-style-type: none"> <li>• Surveyed mills</li> <li>• Confirmed 16 mills accepting paper FSP</li> </ul>		
<p><b>Will the material flow to the right bale?</b> Co-sponsored MRF Material Flow Study</p>		<p><b>How to expand end markets for FSP?</b> Engaged in end market outreach, partnerships &amp; development</p>				
2012	2013	2014	2015	2016	2017	2018
<p><b>Where is the material available to be collected?</b> Learned curbside had greatest volume for collection</p>	<p><b>Is food residue a problem?</b></p> <ul style="list-style-type: none"> <li>• Food Residue Study (Boston)</li> <li>• Food Residue Study (Delaware)</li> </ul> <p>Found little to no difference between FSP versus other commonly recycled food packaging</p>		<p><b>How much FSP arises in bales?</b></p> <ul style="list-style-type: none"> <li>• Analyzed mixed paper bales in Seattle and NYC</li> <li>• Co-sponsored Rigid Plastics Bale Audit</li> </ul>	<p><b>What messaging is clearest for residents?</b> Conducted National Resident Messaging Survey</p>	<p><b>How to add FSP to city's materials?</b> Developed image library, flyers, ads, video, best practice language</p>	<p><b>How does compostable FSP contribute as a feedstock?</b> Found compostable FSP provided the same benefit as traditional carbon / bulking materials</p>
<p><b>How will FSP impact the bale?</b> Estimated impact</p>		<p><b>Which cities and composters accept FSP?</b> Co-sponsored BioCycle residential study and surveyed composters</p>				

Overviews of studies available at [www.recycleFSP.org](http://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](http://www.RecycleFSP.org) with new case studies, etc.
- Promote PRA/PRG activities at conferences

# The Pitch



# Why Your Company Should Join



## #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)

- [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

Sales	Contribution
Under \$10 million	\$3,750
\$10-99 million	\$7,500
\$100-249 million	\$15,000
\$250-500 million	\$22,500
Over \$500 million	\$30,000

# Financial Commitments for Foodservice Operators/Brands

- Based on your company's annual sales in the U.S. and Canada

Sales	Contribution
Under \$500 million	\$7,500
\$500-999 million	\$11,250
\$1-5 billion	\$22,500
Over \$5 billion	\$33,750

Visit [www.RecycleFSP.org](http://www.RecycleFSP.org)

Questions?  
Lynn Dyer  
571.255.4211  
[ldyer@fpi.org](mailto:ldyer@fpi.org)



The screenshot shows the FPI website's navigation menu with links for HOME, ABOUT FPI, FOODSERVICE OPERATORS, COMMUNITIES, MATERIALS RECOVERY FACILITIES, END MARKETS, COMPOSTING & AD FACILITIES, and FAQs. The main heading is 'Foodservice Packaging Recovery Toolkit'. Below the heading, there is introductory text about the benefits of recovering foodservice packaging (FSP) and a description of the toolkit as a comprehensive resource. At the bottom, there are five image-based categories: Foodservice Operators, Communities, Materials Recovery Facilities, End Markets, and Composting & Anaerobic Digestion Facilities.

