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WASTE & OPPORTUNITY 2020

SEARCHING FOR CORPORATE LEADERSHIP

EXECUTIVE SUMMARY



50 CORPORATIONS RANKED ON PLASTIC PACKAGING POLLUTION



AS YOU SOW®

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About *As You Sow*

As You Sow is a nonprofit organization dedicated to increasing environmental and social corporate responsibility. Founded in 1992, *As You Sow* envisions a safe, just, and sustainable world in which environmental health and human rights are central to corporate decision making. Its Energy, Environmental Health, Waste, and Human Rights programs create positive, industry-wide change through corporate dialogue, shareholder advocacy, coalition building, and innovative legal strategies. For more information, visit www.asyousow.org.

Note to the Reader

This data was company-reported to *As You Sow* directly or collected from publicly available documents and is not exhaustive. Please contact individual companies with questions regarding the corporate data presented in this report. If you are a company representative and believe there has been an error in the data collected and ranked, or would like to submit updates of new information, please contact us at sustainablepackaging@asyousow.org, so we can update our information.



AS YOU SOW

As You Sow surveyed and ranked 50 companies and found that most companies are failing to take basic actions needed to reduce plastic pollution

PLASTIC PACKAGING IS HARMING PEOPLE & PLANET ACTION NEEDS TO BE TAKEN TO REDUCE, REUSE, & RECYCLE

THE SIX PILLARS OF SUSTAINABLE PLASTIC PACKAGING



1: PACKAGING DESIGN

Prioritize sustainable delivery systems, alternatives to plastic packaging, and designing packaging to be reusable, recyclable, and compostable. Packaging must be compatible with collection and recycling systems.



2: REUSABLE PACKAGING

Prioritize reusable or refillable packaging systems and low to zero-waste models for single use packaging.



3: RECYCLED CONTENT

Establish programs and commitments to increase the use of recycled content in plastic packaging.



4: PACKAGING TRANSPARENCY

Disclose key metrics: weight and units of all packaging and all plastic packaging generated; use of recycled content.



5: SUPPORTING RECYCLING

Support research and funding for fixing recycling infrastructure. Work towards reducing packaging impacts within the broader systems of collection and processing.



6. PRODUCER RESPONSIBILITY

Support deposit and producer responsibility programs to dramatically increase recycling rates and provide adequate feedstock for recycled content goals.

ONLY 7%
OF FUNDING NEEDED SECURED

\$12 BILLION FUNDING
NEEDED TO FIX RECYCLING **100%**

SPOTLIGHT

U.S. curbside recycling is capturing just **32%** of recyclable materials. Only **7%** of funding needed to fix recycling has been raised. Companies need to take financial responsibility to ensure their packaging is recyclable and recycled. A severe shortage of materials needed for recycled plastic content and lack of progress on making flexible packaging recyclable suggests many companies may not meet recycled content goals and recyclability pledges under the New Plastics Economy Global Commitment.



SURVEY SUMMARY

A few companies made notable commitments and supported promising startups... Far more companies must become engaged and commitments must be more ambitious

POSITIVE ACTIONS



NEARLY HALF OF COMPANIES PLEDGE TO MAKE ALL PACKAGING RECYCLABLE BY 2025: 19 out of 50 companies made this pledge, which is a needed first step to reduce packaging pollution.



PROMISING REUSABLE MODELS: Programs run by startup companies like Loop and Algramo suggest reusable packaging models are gaining traction and can be scaled up.



UNILEVER SETS PLASTIC PACKAGING REDUCTION GOALS: It pledged to reduce plastic packaging by 100,000 tons and use 25% recycled plastic content by 2025 – the first major consumer goods company to promise an absolute cut.



COMPANIES DISCLOSING UNIT SALES: An important benchmark to determine actual cuts in plastic use is units generated. Wendy's, Coca-Cola, and Colgate-Palmolive are now disclosing unit sales.

IMPROVEMENTS NEEDED



LITTLE PROGRESS ON RECYCLING FLEXIBLE PRODUCTS: Companies lag badly in finding cost effective, scalable recycling options for pouch and sachet packaging, which has flooded global markets, and ends up by the billions in oceans and on beaches.



AMBITIOUS REUSABLE PACKAGING COMMITMENTS ARE RARE: Companies are not switching to reusables fast enough. Only 2 companies, Nestle Waters NA, and Coca-Cola, generate at least 15% of revenue from reusables.



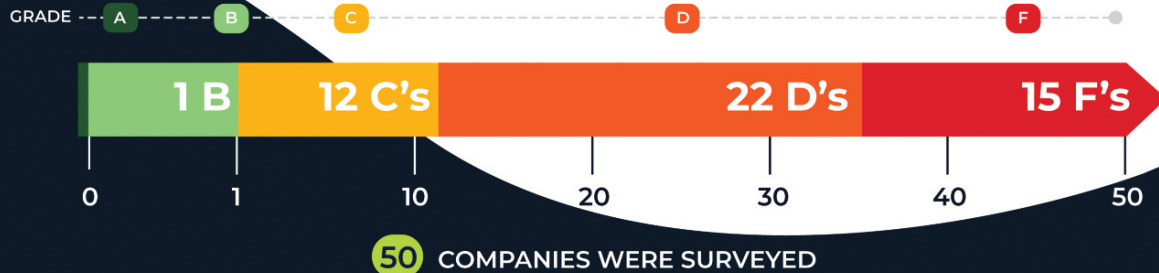
RECYCLED CONTENT USE LOW: Companies do not have high levels of recycled content in use, and there is not enough supply of post-consumer materials to meet current 2025 corporate recycled content commitments.



LACKING PRODUCER RESPONSIBILITY: U.S. curbside recycling systems are doing poorly, and most companies have failed to agree to needed solutions such as deposit and producer responsibility laws.

SUMMARY

No companies received an A. Only one company received a B level grade, Unilever, which received a B-. All other companies received C, D, and F's for their average all across 6 pillars.



EXECUTIVE SUMMARY

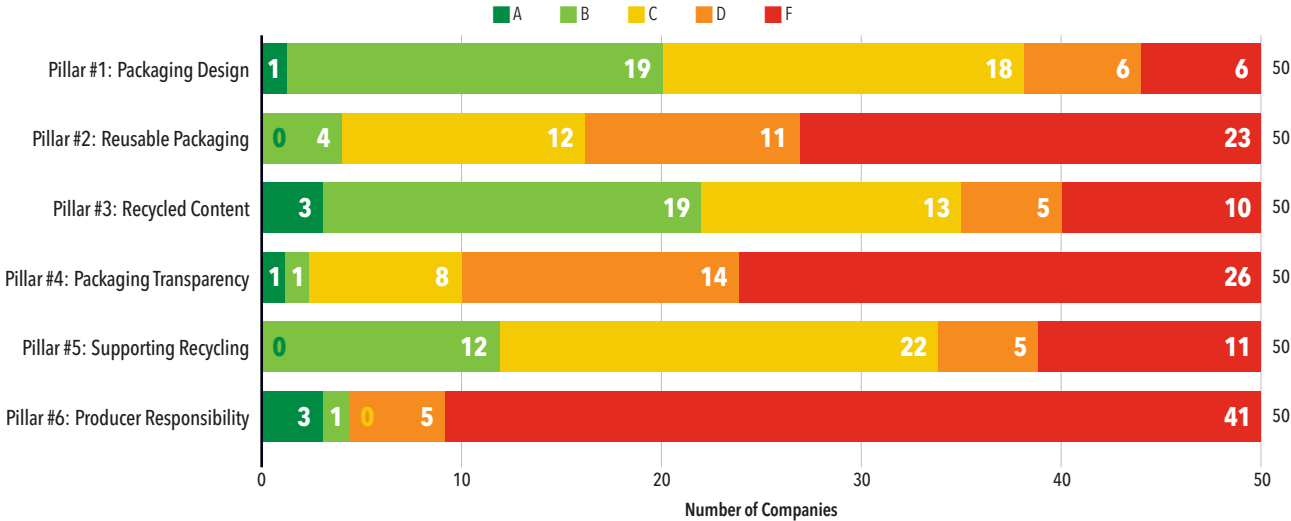
Plastic pollution is a global crisis that is actively threatening oceans, wildlife, and public health. Plastic pollution has rapidly elevated to crisis level in the past three years as better data on the scope of the problem has become available. Single-use packaging has grown to be a major component of the four million to 12 million tons of plastic trash that escapes capture and is swept into waterways annually. To address these pollution concerns, as well as reduce the use of extractive resources, companies must prioritize a shift away from wasteful single-use packaging and move toward circular models that prioritize significant, absolute reductions in overall use of plastic, as well as promote reusability, recyclability, or compostability in their packaging.

This study measures the progress of 50 large companies in the beverage, quick-service restaurant, consumer packaged goods, and retail sectors on six core pillars where swift action is needed to reduce plastic pollution: 1) Packaging Design, 2) Reusable Packaging, 3) Recycled Content, 4) Packaging Data Transparency, 5) Support for Recycling, and 6) Producer Responsibility. The report provides letter grades on the 50 companies, based on their quantitative performance on these six core pillars. The grades inform stakeholders and investors about which companies are leading and lagging in creating sustainable packaging. Also, the report’s criteria provide tangible metrics to help companies continue to improve their packaging management strategies as they enter the new decade.

Companies must prioritize a shift away from wasteful single-use packaging and move toward circular models.

Company progress was most evident in pledges to redesign packaging to be reusable, recyclable, or compostable, followed by commitments to recycled content and actions to support recycling. More companies demonstrated leadership in these categories and received A or B grades. There was notably less leadership in the areas of reusable packaging innovation, data transparency, and producer responsibility as shown in Figure 1 (see Appendix A of full report for individual company grades listed by pillar). These results indicate that companies have a long way to go to demonstrate leadership in all six core pillars.

FIGURE 1: Number of Companies Receiving Each Grade



Key Findings

Promising reuse models identified. Circular shopping platforms, Loop and Algramo, two of several reuse models under development, offer hope for scalable delivery of a variety of products in reusable packaging, both in stores and via home delivery. Unilever sells shampoo bars and toothpaste tablets that reduce or replace packaging. Coca-Cola Co. plans to ramp up refillable bottles to 50% of sales in Brazil by 2030. To speedily reduce packaging and plastic waste, far more companies need to set ambitious goals to develop reusable packaging and new low- to zero-waste product delivery methods.

Ambitious reusable packaging commitments are rare. Most companies are lagging in establishing reusable packaging models and are not moving swiftly enough to replace single-use packaging. Only two of the 50 companies analyzed—Nestlé Waters NA and Coca-Cola Co.—reported that they generate at least 15% of revenue from reusable packaging products. However, this mostly reflects ongoing and historical operations, not necessarily replacement of single-use units of packaging with new reusable models. Only two of the companies analyzed—Anheuser-Busch InBev and Starbucks—have set specific goals to increase company-wide reusable packaging delivery methods.

Nearly half the companies surveyed have pledged to improve packaging design. Twenty-one of the 50 companies researched have pledged that all their packaging will be reusable, recyclable, or compostable, with 19 pledging to do it by 2025. This is an encouraging first step, but far more companies must also undertake equally ambitious commitments to reduce the total amount of plastic used, reduce the amount of virgin plastic used, and dramatically increase use of recycled content. Further, these pledges need to be paired with financial support for more efficient recycling systems, enhanced recycling processing infrastructure, and sustained market demand to effectively recycle plastic.

Corporate commitments and initiatives are too new to determine if company actions are the real deal. More than 200 companies have committed to reduce plastic pollution under the New Plastics Economy Global Commitment. However, this and related initiatives are not sufficiently advanced to determine whether companies are genuinely committed to systemic change and to execute on their goals. Caution and healthy skepticism are in order as there is a history of backsliding and failed promises around reusables, packaging recycling, and recycled content.

Meeting recycled content goals will be a challenge. Many companies have set ambitious goals to increase recycled plastic content, but recyclers say there is nowhere near enough supply of collected plastic to meet the demand. To meet the goals, many of which are for 2025, the U.S. recycling rate, which has barely budged over the last decade, would need to more than double in a very short time frame. This would be an unprecedented effort to achieve and represents a core challenge to companies.

Some companies are beginning to disclose unit sales. For stakeholders to fully understand success in meeting recycled content and reduction goals, companies need to supplement weight or volume information with disclosures of how many individual units of plastic packaging and overall packaging they place into commerce annually to provide a benchmark to more accurately measure real future reductions in plastic use. Only three of the 50 companies surveyed—Coca-Cola Co., Colgate-Palmolive Company, and Wendy's—reported unit sales.

Little progress on making flexible plastic packaging recyclable. One of the biggest dilemmas for meeting companies' recyclability goals is the widespread and growing use of non-recyclable flexible plastic packaging, including sachets, pouches, and films. There is little evidence of the swift movement needed to make this material recyclable in practice by the 2025 goal set by scores of companies. Some brands are touting chemical recycling as a solution, a range of technologies that can restore or recycle degraded and low-value plastic, but several of

the technologies are concerning, and most are a decade away from being available at scale. Companies do not have the luxury of 10 years to ramp up new recycling solutions given the substantial ongoing impact of these materials on the environment. To meet the 2025 deadline, companies may need to move away from flexible packaging to materials that can be processed by the current mechanical recycling system.

Strapped recycling system needs massive infusion of producer funding. The U.S. curbside recycling system is performing poorly, capturing just 32% of recyclable materials available for processing from U.S. homes. The system needs an estimated \$12 billion in new investment to perform properly, but cities cannot afford to finance it, and only about \$870 million—about 7%—appears to have been invested to date. Companies should be investing up to 1% of their annual revenue toward capturing the products they put on the market. Only four companies—Nestlé Waters NA, Campbell Soup Company, Colgate-Palmolive Company, and Target Corporation—disclosed a percentage of annual revenue contributed toward recycling infrastructure, and none were close to 1%.

Very few companies endorse producer responsibility. Companies placing packaging on the market must step up and take responsibility to finance creative solutions to fix U.S. recycling systems. The fairest way is through producer responsibility programs, but companies are lagging badly on accepting such responsibility. In this study, the highest number of companies received failing scores in the Producer Responsibility pillar. Only four companies—Coca-Cola Co., Nestlé and its Nestlé Waters NA subsidiary, and Unilever—endorsed some form of producer responsibility, but endorsement does not necessarily imply proactive support for legislative action.

Companies identified by activists as top polluters are most visibly active in starting to address their plastic pollution problem. Coca-Cola Co., Colgate-Palmolive Company, Nestlé, PepsiCo, and Unilever were named among the top 10 polluters based on packaging collected by Break Free From Plastic activists in more than 400 brand audits in 50 countries in 2019. These companies were also among the highest scorers on our packaging sustainability scorecard. Brands are feeling the pressure on their reputation and taking significant action to fund policies and programs that have the potential to deal with problematic packaging and reduce plastic pollution. There is far less evidence of commitment and action by less prominent companies.



Break Free From Plastic activists conducting brand packaging audit, Kerala, India.

(Photo courtesy Stiv Wilson, Peak Plastic Foundation)

Longtime deposit foe Coca-Cola Co. may have reversed course. Coca-Cola Co., which has strongly opposed container deposit laws for decades, now reports a changed position from complete opposition to support such systems when managed by producers or a consortium of stakeholders.

Big Companies, Low Grades

All the companies surveyed have significant work to do to achieve the metrics presented in the six pillars that form the basis for this report. However, we identified six laggards that are far behind some peers and, given their size, should be investing far greater resources on plastic packaging reduction, packaging redesign, commitments to recycled content, and support for recycling. The six largest companies surveyed based on revenue that received either a D or an F are Walmart Inc., Kroger Co., PepsiCo, Tyson Foods, Inc., Kraft Heinz Co., and Mondelēz International. For more details, see Figure 19 in Conclusion.

FIGURE 2: Grade Summary

COMPANY	OVERALL GRADE	COMPANY	OVERALL GRADE
Unilever PLC	B-	Mondelēz International	D
Nestlé Waters NA	C+	Burger King	D
Nestlé	C+	KFC	D
Colgate-Palmolive Co.	C+	Molson Coors Beverage Co.	D
Coca-Cola Co.	C+	Monster Beverage Corp.	D
Procter & Gamble	C	Costco	D-
Diageo PLC	C	Chipotle Mexican Grill, Inc.	D-
Keurig Dr Pepper	C	Kraft Heinz Co.	D-
Johnson & Johnson	C-	Pizza Hut	D-
McDonalds	C-	Taco Bell	D-
Clorox Co.	C-	Dean Foods	F
Starbucks	C-	Hershey's Co.	F
Anheuser-Busch InBev	C-	Conagra Brands Inc.	F
Target Corp.	D+	Whole Foods Market	F
Kellogg Co.	D+	Pilgrim's Pride Corp.	F
PepsiCo	D+	Hormel Foods	F
Walmart Inc.	D+	Papa John's	F
Campbell Soup Co.	D+	Smithfield Foods, Inc.	F
Kimberly-Clark Co.	D+	Tyson Foods, Inc.	F
Wendy's	D+	J.M. Smucker Co.	F
General Mills	D	Boston Beer Co.	F
Tim Hortons	D	United Natural Foods	F
Heineken Co.	D	Domino's Pizza Inc.	F
Kroger Co.	D	Jack in the Box	F
Dunkin' Brands	D	National Beverage	F

Recommendations

PILLAR 1: PACKAGING DESIGN

- Far more companies need to show evidence of prioritizing redesign of their packaging and move toward alternative delivery models like reuse or refill, or, at a minimum, make their packaging recyclable or compostable.
- Companies should match packaging design to available post-consumer solutions. A food or beverage package must be designed to accommodate systems that can actually recycle or compost their materials. Companies offering compostable packaging should only use it in areas that can process it with industrial compost operations and in such a manner that does not harm the composting process or product.
- No more goods should be placed in flexible plastic until these materials can be viably recycled or composted at scale.
- Fast food companies and retailers should end free provision of single-use items, such as cutlery, single serve condiments in non-recyclable pouches, and plastic bags, and in the longer term offer reusable alternatives.
- Companies that create environmentally innovative packaging, like Unilever's black plastic pigment, should foster sector- or industry-wide adoption of that packaging, increasing the chance that innovations can be used universally and at scale.

PILLAR 2: REUSABLE PACKAGING

- Culture change is required for circular economy design. Far more companies must take leadership roles in creating a circular economy culture to remain relevant in a world where consumers are increasingly preferring choices that promote sustainability, improve health, and reduce pollution problems, such as ocean plastics. They can do so by collaborating with packaging designers, marketers, and sustainability staff to develop low- to zero-waste delivery models. These values and policies must then be communicated to a company's supply chain and waste management system as well as reflected in investments and resulting transactional behavior. While some companies have adopted a broad statement to work toward these goals or have put some pilot projects in place to reduce waste, companies must begin demonstrating evidence of creating a culture that prioritizes designing for zero waste across a product's lifecycle to be successful over the long term.
- It is encouraging that so many companies are invested in pilot reuse and low- to zero-waste product delivery. However, for these projects to make a dent in the plastic pollution crisis, they must be heavily invested in over a short period of time to be brought to scale. Low- to zero-waste packaging solutions should receive an equal or greater amount of corporate attention as do investments in recyclability.
- In addition to shifting corporate culture to prioritize low-to zero-waste delivery of goods, companies should begin to set goals to generate an increasing amount of revenue from sales of such products. This sends a signal to stakeholders and corporate peers, as well as consumers, that these commitments are serious and being formally planned for and budgeted by design, marketing, and operations staff. While many companies are talking the talk by setting non-binding goals, companies need to set metric-based goals as a percentage of total company revenue to seriously walk the walk.

PILLAR 3: USE OF RECYCLED CONTENT

- Beverage companies, packaged goods companies, and retailers must support deposit laws and producer responsibility policies to increase the capacity of the U.S. recycling system to collect sufficient amounts of post-consumer plastic to meet company recycled content goals.
- There is generally no penalty when companies fail to meet their recycled content goals. We have penalized Coca-Cola Co.'s ranking in this report for repeated failures to meet recycled content goals. One way to put teeth into commitments is for companies to prioritize reaching long-term contracts with recycling processors to send a signal to processors that they will have paying customers buying their recycled plastic

feedstock for many years. That, in turn, sends a signal to local recycling and waste collection companies like Waste Management, Inc., and Republic Services, Inc., to invest in expanded efforts to collect more of the marketable plastics from customers curbside.

- Coca-Cola Co. and other companies that promise to use high levels of recycled content should follow Nestlé's lead and commit to paying higher, above-market prices for recycled content plastic to help further develop this market.
- As pressure mounts on companies to commit to high levels of recycled content, the potential for fraud will increase. Companies must take steps to certify that their recycled content is from post-consumer sources. The Association of Plastics Recyclers is working on a program to conduct such certifications.

PILLAR 4: WASTE TRANSPARENCY

- Companies should include goals for reductions in overall plastic use and reduction of single-use plastic units put into commerce in annual corporate social responsibility reporting, so investors and stakeholders can better assess corporate policies and practices responsive to the risks posed by plastic pollution.
- Companies need to set goals for and report the percent of company revenue associated with low- to zero-waste delivery methods. This figure is important for investors to be able to measure how much of a company's operations is positioned to deliver products via low-waste solutions. Companies should also set goals for and disclose the percentage of revenue invested to support recycling infrastructure.
- Companies should work together to standardize reporting to make it easier for stakeholders to compare performance. One option for tracking progress is the World Wildlife Fund's recently launched ReSource: Plastic initiative, which provides a standard methodology and platform to track and publicly report on the progress of companies' large-scale plastic waste commitments.

PILLAR 5: SUPPORT FOR RECYCLING

- Far more funding is needed to fix recycling. With only about 7% of the necessary funds leveraged to date in the U.S., far more brands need to step up ways to directly support or otherwise bring much-needed capital and sustainable financing to the country's collection and processing system.
- Flexible packaging solutions need rapid investment. With less than five years to make flexible plastic recyclable by 2025 under the New Plastics Economy Global Challenge, there is no coordinated industry effort to find scalable solutions. Companies producing and using flexible plastic should move rapidly to find solutions or risk having to abandon flexibles to make good on their pledge.
- Chemical recycling needs close scrutiny. Chemical recycling is being touted as a way to radically reduce plastic waste, yet it faces many unanswered questions about its cost and safety and whether investors will spend billions of dollars needed to develop a working global infrastructure to process post-consumer flexibles.
- More producers need to work in tandem with local government. More quick-service restaurant companies need to engage with municipalities to find ways to provide curbside recycling for paper cups and to provide or sponsor a network of public recycling bins near their restaurant locations. Companies should also work more extensively with paper recyclers so that a greater variety and amount of post-consumer packaging can be included in mixed paper bales for recycling.

PILLAR 6: EXTENDED PRODUCER RESPONSIBILITY

- Corporate responsibility managers need to prioritize obtaining buy-in from senior management for deposit or other programs, as appropriate, and go beyond simple endorsement and aggressively promote such legislation as part of their legislative lobbying agenda.
- More companies need to follow Unilever's lead and challenge peers to step forward and publicly support a national approach to producer responsibility laws and deposit programs. Having uniform national programs could allow leapfrogging progress on recycling and reduce the time needed to increase recycling rates by many years.

The Biggest Laggards

FIGURE 3: Largest Companies by Revenue That Received a D or F Grade

<p>Walmart Inc. Revenue: \$500 billion Grade: D+</p>	<p>Lacks goal for reduction in plastic packaging use or cuts in use of virgin plastic packaging. No active pilot projects on reusable packaging. No plastic use data disclosure. No support for producer responsibility.</p>
<p>Kroger Company Revenue: \$121 billion Grade: D</p>	<p>Lacks commitment to make all packaging reusable, recyclable, or compostable. No plastic use data disclosure. No support for producer responsibility.</p>
<p>PepsiCo Revenue: \$64 billion Grade: D+</p>	<p>No goal for overall reduction in plastic packaging. No goal to increase company-wide reusables. Does not report units of packaging. Does not support extended producer responsibility. Failed eight-year commitment to increase national container recycling rate.</p>
<p>Tyson Foods, Inc. Revenue: \$41 billion Grade: F</p>	<p>Lacks commitment to make all packaging reusable, recyclable, or compostable. No goal for cuts in total plastic packaging or in use of virgin plastic packaging. No commitments on reusable packaging or recycled content. Minimal data disclosure. No support for producer responsibility.</p>
<p>Kraft Heinz Co. Revenue: \$26 billion Grade: D-</p>	<p>No goal for cuts in overall plastic packaging use or in use of virgin plastic packaging. No goals on reusable packaging. No goals on recycled content. No plastic use data disclosure. No support for producer responsibility.</p>
<p>Mondelēz International Revenue: \$25 billion Grade: D</p>	<p>No goal for cuts in overall plastic packaging use or in use of virgin plastic packaging. No goals on reusable packaging. No plastic recycled content goals. No plastic use data disclosure. No support for recycling or producer responsibility.</p>



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