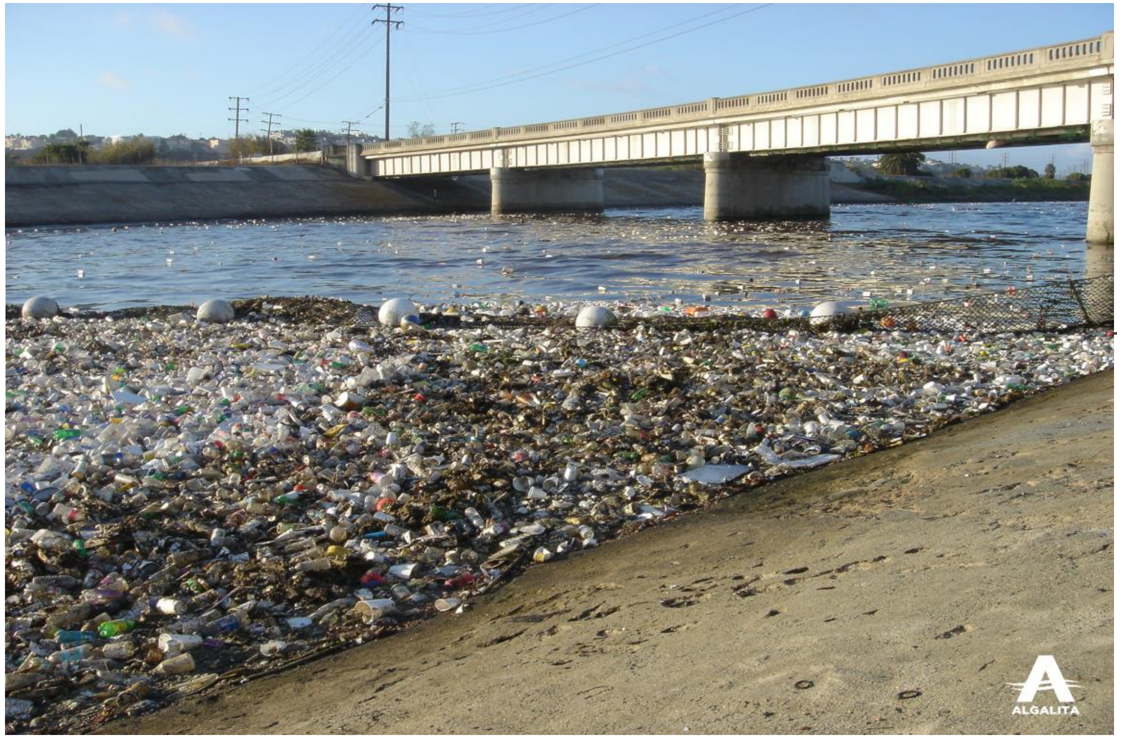

Waste and Opportunity 2020:
The Search for Corporate Leadership

50 CORPORATIONS RANKED ON PLASTIC PACKAGING POLLUTION

AS YOU SOW

Welcome & Logistics

Moderator
Conrad MacKerron
Senior Vice President
As You Sow

Agenda

- Introduction
- Report Overview
  - Analysis of Findings
- Panel Presentations
  - Panel Discussion of Findings
- Audience Q&A
- Wrap Up

Audience Q&A

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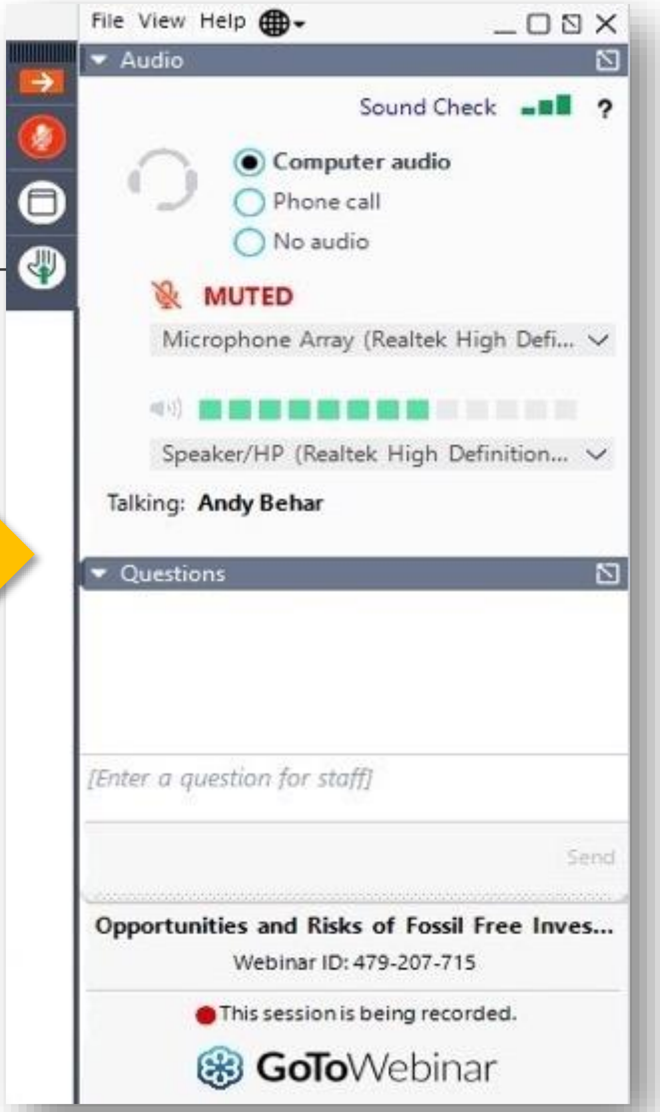
Q&A Window



Plastic Pollution: A Growing Global Crisis

Photo credit: Algalita Marine Research and Education

Report Presentation

Kelly McBee
Waste Program Coordinator,
As You Sow

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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.

Findings, Pillar 1: Packaging Design

Leadership Action: Nearly half of companies have goals to make their packaging reusable, recyclable, or compostable.

- Unilever – Plastic reduction

Challenges: Prioritization of disposable packaging & use of materials for which recycling infrastructure does not exist.

- Only 2 companies have goals to reduce the amount of plastic they use.

Recommendations: Prioritize redesign for reuse, then recyclability.

Findings, Pillar 2: Reusable Packaging

Leadership Actions: Nearly half of companies have a reusable pilot

- ABInBev & – Reusables Goals

Challenges: Only 2 companies can associate a significant portion of revenue to reusables

- Lack of industry culture change around the importance of transitioning to reusables.

Recommendations: Scale pilots and set metrics-based goals to increase use of reusables.

Findings, Pillar 3: Recycled Content

Leadership Actions: 17 companies commit to use more recycled content in the next ten years.

- Nestlé – Will pay a recycled content premium

Challenges: Only 5 companies using 5% or more recycled content

- U.S. lacks enough feedstock to meet recycled content demands

Recommendations: Support producer responsibility schemes that result in greater availability of recycled content, and commit to paying a premium for recycled plastics.

Findings, Pillar 4: Data Transparency

Leadership Actions:

- Coca-Cola – Discloses 8 of 10 metrics

Challenges: Increased corporate disclosure on metrics keys to tracking plastic pollution prevention.

- Only 3 companies report units sold
- Only 4 companies report recycling donations as revenue

Recommendations: Companies should set goals to comprehensively report on packaging data.

Findings, Pillar 5: Supporting Recycling

Leadership Actions: Most companies have taken some form of action to support recycling

- The Recycling Partnership and Closed Loop Partners

Challenges: $12 billion will be needed to fix recycling and only 7% has been raised to date.

- No company donates 1% of annual revenue to recycling infrastructure

Recommendations: Companies must significantly increase the funds they contribute to improving US recycling infrastructure, up to 1% of annual revenue.

Findings, Pillar 6: Producer Responsibility

Leadership Actions:

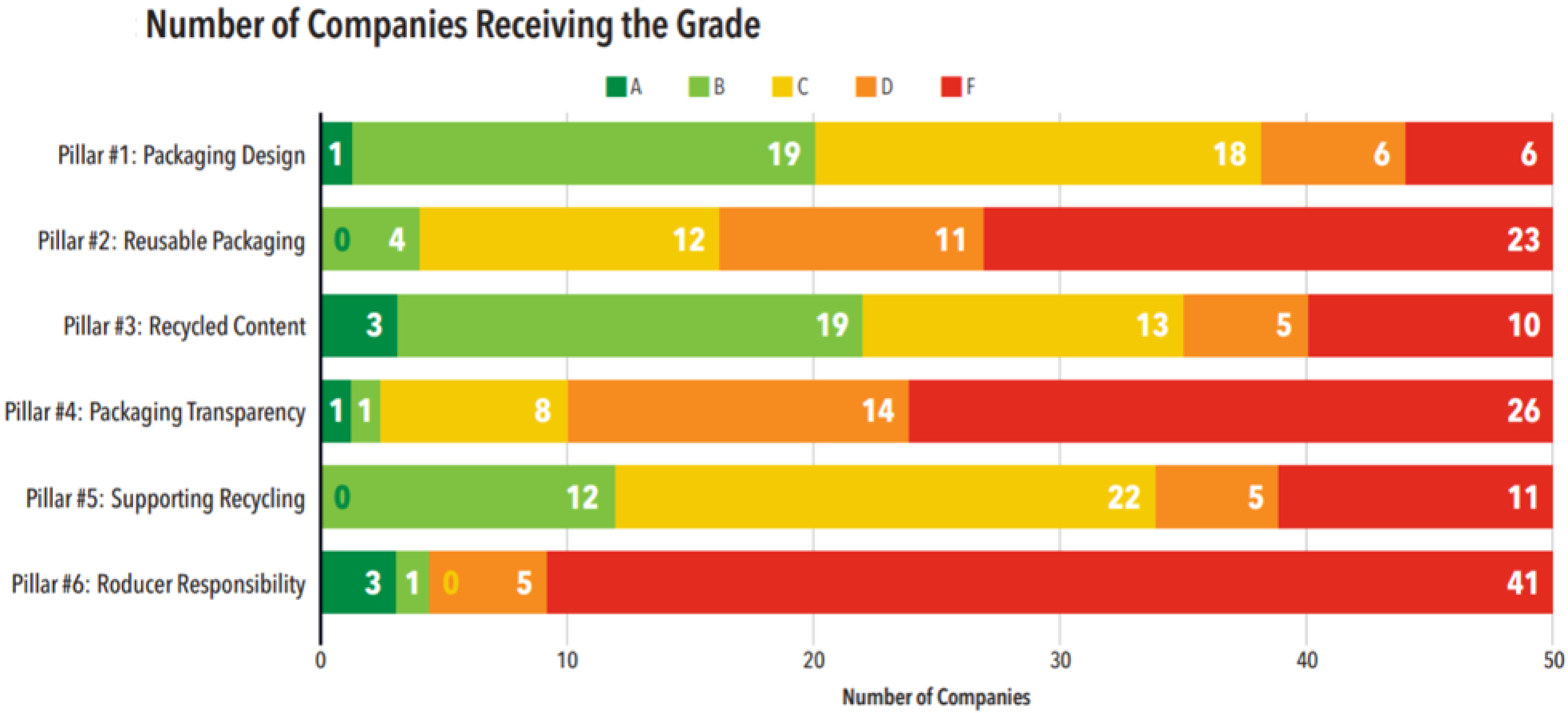
- Nestlé Waters North America & Unilever – Support producer responsibility

Challenges: Lack of collective support for producer responsibility.

- Worst corporate performance of any pillar.

Recommendations: Companies must support – and publicly encourage their peers to support – producer responsibility and deposit legislation.

Big Companies, Low Grades



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

Data Visualization Example: Unilever PLC

B-

Packaging Design	A	Reusable Packaging	C
Recycled Content	B	Packaging Transparency	C-
Supporting Recycling	B	Producer Responsibility	A
Failed Sustainable Packaging Commitment	No Penalty		

Packaging Design A

Indicators	
Goal to make company-wide reductions in plastic packaging or all packaging materials	YES
Goal to reduce company-wide virgin plastic use in packaging	YES
Goal to design packaging to be 100% recyclable, compostable, or reusable	YES
Actions to reduce packaging materials or increase packaging recyclability	YES
Broad statement to reduce packaging waste or increase packaging recyclability	YES

Reusable Packaging C

Indicators	
Company generates 15% or more of annual revenue with reusable packaging products	NO
Goal to increase company wide reusable packaging delivery methods	NO
Actions or pilot programs to utilize reusable packaging	YES
Company has broad statement to support reusable packaging actions	YES

Recycled Content B

Indicators	
Company currently uses 5.0% or more of recycled content in company-wide plastic packaging	NO
Goals to use recycled content in company wide plastic packaging	YES
Use of recycled content in some types of plastic packaging	YES
Actions to source fiber from recycled or responsible sources	YES
Statement or actions to increased recycled content	YES

Packaging Transparency C-

Indicators	
Reports tonnage or volume of all packaging materials	YES
Reports tonnage or volume of plastic packaging	YES
Reports units of all types of packaging	NO
Reports units of plastic packaging	NO
Reports percentage of packaging made from any kind of post-consumer recycled content	NO
Reports percentage of packaging made from post-consumer recycled plastic	YES
Reports percentage of all packaging that is reusable, recyclable or compostable	NO
Reports percentage of plastic packaging that is reusable, recyclable or compostable	YES
Reports percentage of sales that uses reusable packaging	NO
Reports percentage of annual sales revenue that is dedicated to supporting end-of-life infrastructure	NO

Supporting Recycling B

Indicators	
Company donates 1% or more of revenue to support recycling infrastructure	NO
Company makes some donations to support recycling infrastructure	YES
Company does research activities to support recyclable packaging	YES
Company coordinates with retailers or consumers on recycling and reducing waste	YES
Company has projects to improve end-of-life instructions on packaging	YES
Company participates in actions to support recycling or reduce packaging pollution	YES

Producer Responsibility A

Indicators	
Invests in solutions to capture at least as much waste as they produce	YES
Supports extended producer responsibility (EPR) schemes	YES
Goal for products to be properly recycled at the end-of-life (EOL)	YES
Company statement recognizing that packaging waste is a company's responsibility	YES
Company works with stakeholders for at least shared responsibility solutions	YES

Failed Sustainable Packaging Commitment

Indicators	
Failed Sustainable Packaging Commitment [No Penalty = Green for Good Performance, Penalty = Red for Bad Performance]	No Penalty

Comment & Analysis

Conrad MacKerron
Senior Vice President
As You Sow

Comment & Analysis Topics

- Notable positive actions
- New metrics to hold companies accountable
- Composting infrastructure
- Flexible plastics
- Chemical recycling
- Recycled content
- Fixing recycling

Panelist Presentation

Sander Defruyt
Lead, New Plastics Economy
Ellen MacArthur Foundation

NEW PLASTICS ECONOMY

We aim to set the global economy on an irreversible path towards **a future where plastic never becomes waste.**

Eric & Wendy Schmidt Fund for STRATEGIC INNOVATION
OAK FOUNDATION

amcor BOREALIS L'ORÉAL MARS Nestlé PEPSICO Unilever VEOLIA Walmart

ELLEN MACARTHUR FOUNDATION

The new plastics economy vision

1. **Elimination of problematic or unnecessary** plastic packaging through redesign, innovation, and new delivery models

2. **Reuse models** are applied where relevant, reducing the need for single-use packaging

3. All plastic packaging is **100%** reusable, recyclable, or compostable by design

4. All plastic packaging is reused, recycled or composted **in practice**

5. The use of plastic is fully **decoupled** from the consumption of **finite resources**

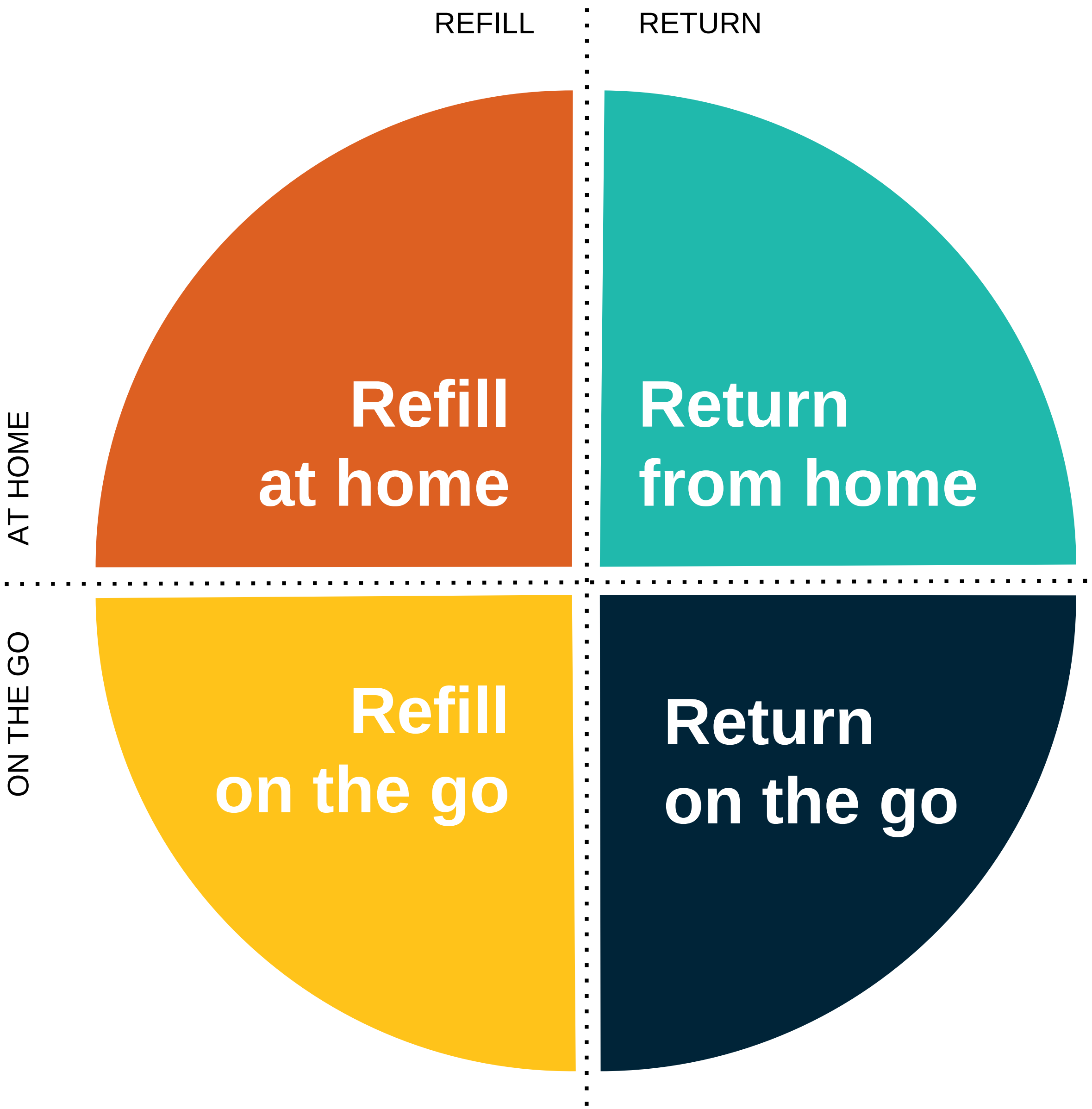
6. All plastic packaging is free of **hazardous chemicals**, and the health, safety, and rights of all people involved are respected

NEW PLASTICS ECONOMY

ELLEN MACARTHUR FOUNDATION

69 examples of reuse solutions

NEW PLASTICS ECONOMY


REFILL
RETURN
AT HOME
ON THE GO
Refill at home
Return from home
Refill on the go
Return on the go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REFILL
RETURN
AT HOME
ON THE GO
Refill at home
Return from home
Refill on the go
Return on the go
Loop
Algramo
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Reuse models offer significant business benefits

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Cut costs

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Cut costs

Adapt to individual needs

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Cut costs

Adapt to individual needs

Improve user experience

NEW
PLASTICS
ECONOMY

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Cut costs

Build brand loyalty

Adapt to individual needs

Improve user experience

NEW PLASTICS ECONOMY

Cut costs

Build brand loyalty

Adapt to individual needs

Gather intelligence

Improve user experience

ELLEN MACARTHUR FOUNDATION

NEW PLASTICS ECONOMY

ELLEN MACARTHUR FOUNDATION

Cut costs

Build brand loyalty

Adapt to individual needs

Gather intelligence

Improve user experience

Optimise operations

NEW PLASTICS ECONOMY

ELLEN MACARTHUR FOUNDATION

THE MOMENTUM IS BUILDING

43 Global Commitment signatories are currently engaged in testing and piloting reuse business models across different markets and product types.

Bio D, which offers its products in large sizes to allow retailers
to set up refill stations, saw an increase of 52% in its refill sales in 2018.

Packaging producer Amcor's sales of reusable and refillable PET containers in markets where refill programs exist have doubled in the last two years.

Loop has seen an average business sign-up of one per day since it's launch.

Unilever has committed to reduce virgin plastic packaging by 50% by 2025, with one third (more than 100,000 tonnes) coming from an absolute plastic reduction i.e. elimination, reuse, concentrates etc.

92% of EU citizens approve of action to reduce single-use plastics

The Coca-Cola Company aspire to scale up reusable packaging to 50% by 2030 in Brazil, up from the current 20%.

By 2025, Mars Incorporated aims to have launched 10 reuse pilots to test new business models in different geographies and with different brands.

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HOW TO WE CATALYSE REUSE AT SCALE?

Need for more innovation and ambitious pilots to test and understand the success criteria for different reuse models, applications and geographies

Need for scaled up cases to illustrate the overall economic, technical and environmental viability of reuse, which for some reuse models increases drastically with scale

Need to explore harmonisation and sharing of packaging and systems across industries as a key enabler to scale certain types of reuse models

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NEW PLASTICS ECONOMY

Download the REUSE book

Scan me

Panelist Presentation

Keefe Harrison
CEO, The Recycling Partnership

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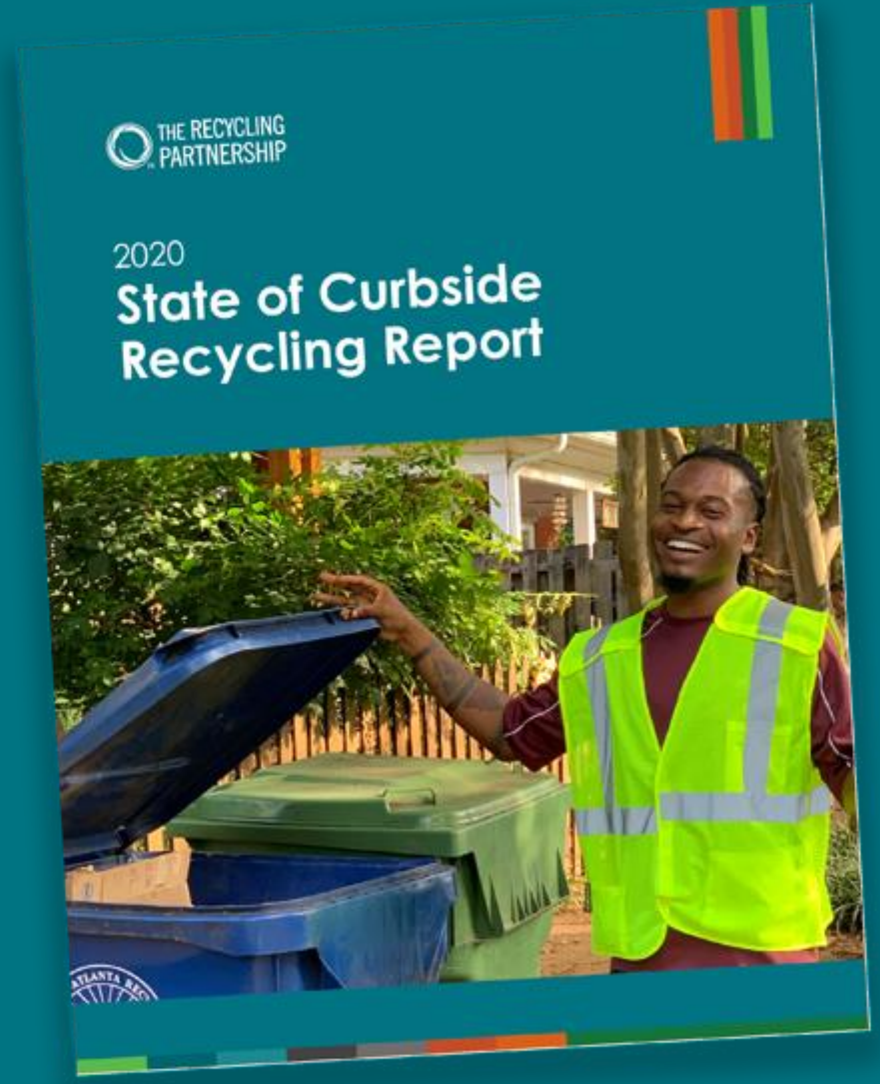
State of US Residential Recycling

Keefe Harrison, CEO
@KeefeHarrison

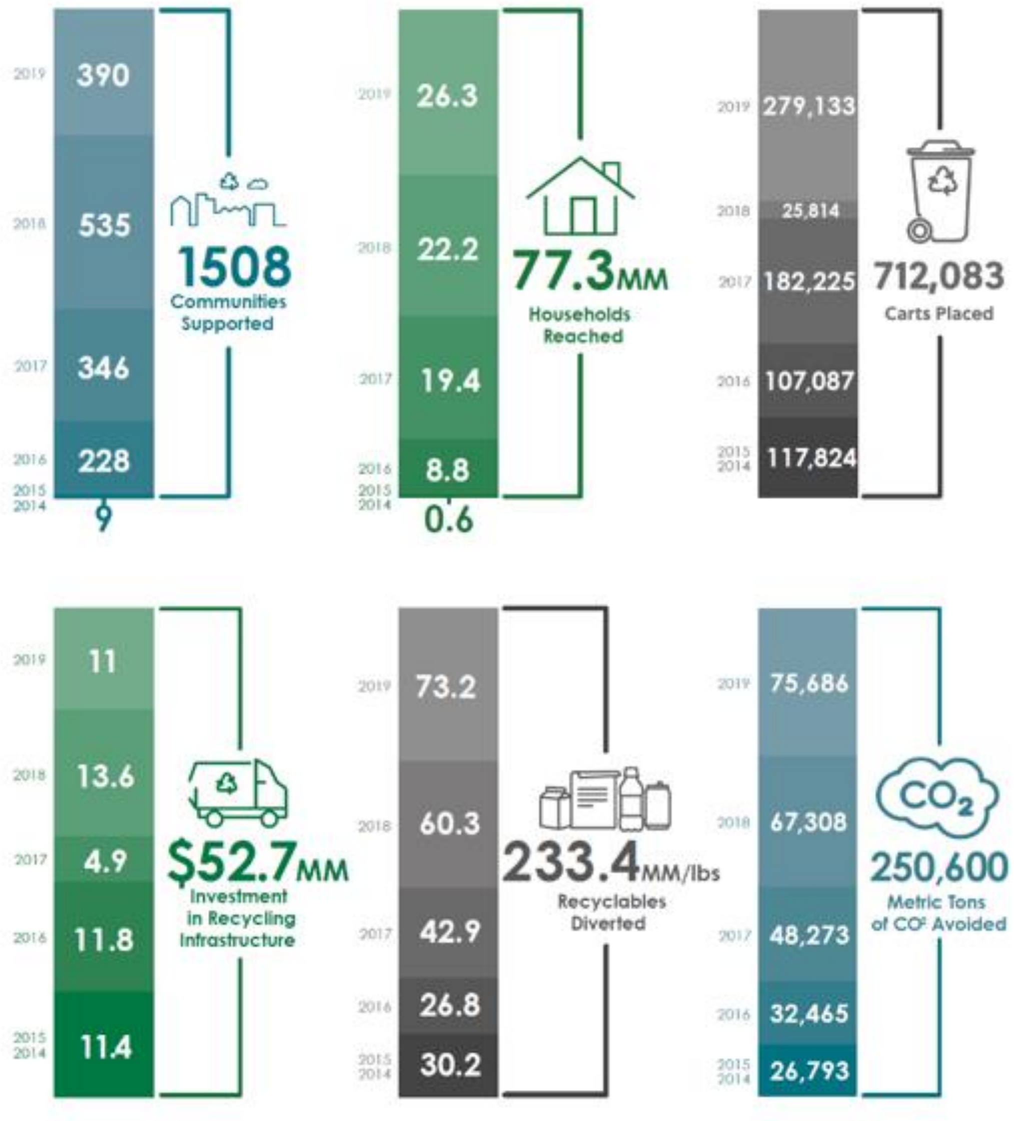
THE RECYCLING PARTNERSHIP



Thank You!

Special Support for Circular Initiatives

Thank You!



*As of April 9, 2020

Year Over Year Impacts

Americans Want to Recycle

- 84% expect products and packages to be **easy to recycle** and made with recycled content
- 80% expect that in 10 years, **products should be 100% sustainable**
- 79% are **more conscious of supporting green/sustainable companies** than they were 5 years ago
- 83% agree that **recycling is a valuable public service**

Americans Want to Recycle

1. Americans want to and expect to recycle:

88% **say recycling is worth the effort, but 73% are unsure about what's recyclable.**

2. Awareness alone doesn't change behavior, it takes more:

Only **32%** **of available recyclables are captured.**

3. Relevant & informational prompts are critical:

On average communities only budget **$1.16 per household for recycling education.**

Estimate of Number of Single-Family Households and Percentage of all U.S. Households Participating in Curbside Recycling

Number of U.S. Households with Curbside Service	Curbside Participation Rate[10]	Estimated Number of U.S. Households Participating in Curbside Service	Percentage of U.S. Single-Family Households Participating in Curbside Service
69.8 million	72%	50.3 million	52%

THE RECYCLING PARTNERSHIP

Recyclable Recovery by Single-Family Household

These homes generate 7,680 lbs of recyclable material per year.

3 of the 10 don't participate in recycling at all. They dispose of 2,150 lbs of recyclable materials each year.

Those that do participate still put some (38.5%) of their recyclables in the trash, disposing of another 2,130 lbs.

Knowing what to throw into recycling, would increase materials captured. By implementing our strategies, together, we could collect another 2,130 lbs. from these participating homes.

THE RECYCLING PARTNERSHIP™

Estimate of Annual Tonnage of Curbside Recyclable Material Generation by U.S. Single-Family Households

Material	Tonnage
Cardboard	5,195,756
Mixed Paper	14,722,469
Aseptics & Cartons	295,586
PET Bottles	2,478,193
Non-bottle PET	524,009
HDPE Natural Bottles & Jars	512,905
HDPE Colored Bottles & Jars	786,644

Material	Tonnage
Glass Containers	7,613,441
Steel Cans	1,126,674
Aluminum Cans	1,002,515
Aluminum Foil & Trays	273,814
Other Plastic Packaging (~3-7)	1,670,402
Bulky Rigid Plastics	1,161,215
Total	**37,363,622**

THE RECYCLING PARTNERSHIP™

Strategies to Get the U.S. to Recycling 2.0

Substantially greater support of community recycling programs with **capital funding, technical assistance, and efforts to strengthen and grow local political commitment** to recycling services.

Development of new and enhanced **state and federal recycling policies.**

Continued and **expanded investment in domestic material processing and end markets.**

Citizen and consumer engagement to create and sustain robust and appropriate recycling behavior.

Continued innovation in the collection, sorting and general recyclability of materials, including the building of flexibility and resiliency to add new materials into the system.

Broader stakeholder engagement in achieving all elements of true circularity, in which the fate of all materials is not just intended to be recycled, but that they are **designed, collected, and actually turned into something new.**


THE RECYCLING PARTNERSHIP
TM
Together, transforming recycling for good.
kharrison@reyclingpartnership.org
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Roundtable Discussion

Conrad MacKerron
Senior Vice President
As You Sow

Sander Defruyt
Lead, New Plastics Economy
Ellen MacArthur Foundation

Keefe Harrison
CEO
The Recycling Partnership

Audience Q&A (15 min)

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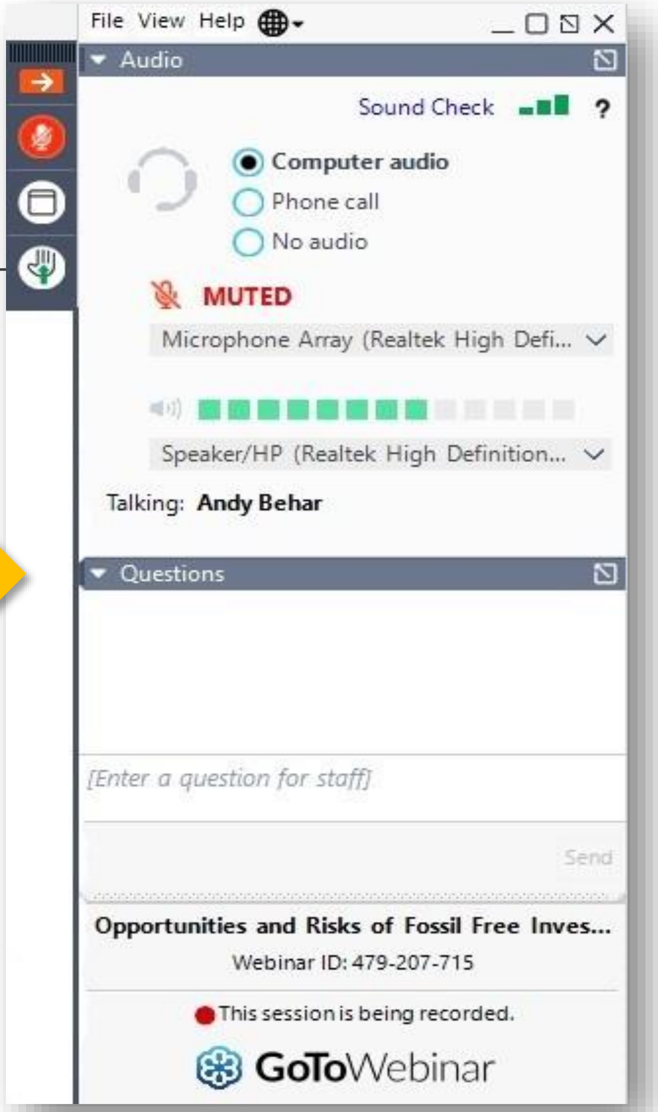
Q&A Window



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