



**PUBLIC AND PRIVATE GOALS FOR PACKAGING AND PRINTED MATERIALS**  
**PSI PACKAGING CALL SERIES – DRAFT**

*Revised: August 1, 2012*

Company	Goals (including timeline and methodology)	Current status (including methodology)	Expected source of new material (e.g., multi-family, container deposits)	Identified barriers	Strategy to overcome barriers
<p><b>Alcoa</b>            World’s leading producer of primary aluminum and fabricated aluminum and one of the largest recyclers in the world. World’s largest miner of bauxite and refiner of alumina. Employs approximately 61,000 people in 200+ locations in 31 countries across the world.</p>	<p>75% recycling rate for beverage containers (cans) by 2015.</p> <p><u>Methodology:</u>            Aluminum Association methodology divides lbs of aluminum cans melted annually by the lbs of cans shipped each year as measured by the Can Manufacturers Institute.</p>	<p>49.6% recycling rate for beer and soft drink cans. (EPA, MSW 2010)</p> <p><u>Methodology:</u>            Aluminum Association methodology described at left supports a 58.1% rate in 2010.</p>	<ul style="list-style-type: none"> <li>• Expect municipally sourced cans to increase as curbside recycling grows.</li> <li>• Policy supporting mandatory recycling in certain channels is more likely than new deposits but may lead to more contamination.</li> </ul>	<ul style="list-style-type: none"> <li>• Funding for infrastructure.</li> <li>• Contamination in single stream channels.</li> <li>• Lack of public motivation / culture of waste/disposal.</li> <li>• Lack of cultural norms supporting change in behavior.</li> </ul>	<ul style="list-style-type: none"> <li>• Policy change supporting change in cultural norms.</li> <li>• Strategic approach to infrastructure and collection.</li> <li>• Acquisition of Evermore Recycling.</li> </ul>

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<p><b>Aluminum Association (AA)</b> Trade association representing U.S. and foreign-based primary producers of aluminum, aluminum recyclers and producers of fabricated products, as well as industry suppliers. Member companies operate more than 200 plants in the United States, with many conducting business worldwide.</p>	<p>75% recycling rate for beverage containers (cans) by 2015.</p> <p><u>Methodology:</u> <i>Not provided.</i></p>	<p>49.6% recycling rate for beer and soft drink cans. (EPA, MSW 2010)</p> <p><u>Methodology:</u> <i>Not provided.</i></p>	<i>Not provided.</i>	<i>Not provided.</i>	<i>Not provided.</i>

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<p><b>American Forest &amp; Paper Association (AF&amp;PA)</b> National trade association of the forest products industry and advances public policies that promote a strong and sustainable U.S. forest products industry in the global marketplace. Member companies make more than 75 percent of the U.S.'s pulp, paper, paper-based packaging and wood building material. Membership represents the diverse spectrum of the forest products industry—from independent forest owners, to family-owned mills, to large multi-product, publicly-owned companies that manufacture pulp, paper, paperboard and wood products.</p>	<p>Increase paper recovery for recycling rate to exceed 70% by 2020.</p> <p><u>Methodology:</u> Continued work with indentified target audiences to reach and exceed 70% goal.</p>	<p>62.5% recycling rate for paper and paperboard packaging. (EPA, MSW 2010)</p> <p>63.5% recycling rate for paper and paperboard packaging. (AF&amp;PA 2010)</p> <p>66.8% of paper and paper based packaging was collected in 2011. (AF&amp;PA 2012)</p> <p><u>Methodology:</u> AF&amp;PA has the most up to date statistics as the majority of capacity data is reported to AF&amp;PA.</p>	<p>Business: Office buildings.</p> <p>Schools: Colleges, universities, and school districts.</p> <p>Community: Multi-family, dwellings, curbside, and rural areas.</p>	<ul style="list-style-type: none"> <li>• Legislation.</li> <li>• Funding for increased education.</li> <li>• Accurate data at state level.</li> </ul>	<ul style="list-style-type: none"> <li>• Support existing voluntary paper and paper-based packaging recovery programs.</li> <li>• Increased education at the state and local level to policy makers of the industries recycling success.</li> <li>• Partner and engage with key organizations and stakeholders to increase paper and paper-based packaging recovery.</li> <li>• Educate students and communities about the importance of paper recovery for recycling.</li> </ul>

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<p><b><u>Association of Postconsumer Plastics Recyclers (APR)</u></b> National trade association representing companies who acquire, reprocess, and sell the output of more than 90 percent of the post-consumer plastic processing capacity in North America. Its membership includes independent recycling companies of all sizes, processing numerous resins.</p>	<p>Increase the amount of plastic material that is recycled in North America. <i>(no specific goal set)</i></p> <p><u>Methodology:</u> Promote the expansion of plastic recycling beyond #1 &amp; #2 bottles.</p>	<p>12.1% recycling rate for plastic packaging. (EPA, 2010)</p> <p><u>Methodology:</u> Creation of a new Rigids Committee within APR to tackle the new challenges.</p>	<ul style="list-style-type: none"> <li>• Rigid PET Thermoform packaging.</li> <li>• Polypropylene (PP) containers.</li> <li>• Other misc. bulky rigids.</li> </ul>	<ul style="list-style-type: none"> <li>• Establishing the collection infrastructure for thermoforms.</li> <li>• Wider variety of resins, labels and adhesives used to manufacture thermoforms.</li> <li>• The information disconnect amongst consumer, MRF, and reclaimer.</li> </ul>	<ul style="list-style-type: none"> <li>• Creation of new bale specifications for thermoforms, tubs and lids, and bulky rigids.</li> <li>• Creation of a Grocery Store Pilot project that has identified more than 350 million pounds of plastic material that can be easily separated and used as feed stock.</li> </ul>

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<p><b><u>Ameripen, American Institute for Packaging and the Environment</u></b> AMERIPEN represents the North American market, furthering the best use of the role, benefits and functions of packaging in society, such as protection of products and the environment and supplying information to and meeting the needs of consumers and customers. AMERIPEN strives to promote fact- and science-based decision-making in order to advocate for a future where all production, distribution, and consumption are sustainable. Using sound science, AMERIPEN</p>	<p>The goal of AMERIPEN is to improve the environmental performance of products and their packages. We advocate and educate on environmental packaging issues related to legislation and regulation.</p> <p>AMERIPEN carries out its activity through focused committees and projects, and sets direction at its annual meeting, which is attended by voting members of AMERIPEN.</p> <p><b>Priorities:</b></p> <ul style="list-style-type: none"> <li>• increase the understanding and communicate the value</li> </ul>	<p>AMERIPEN's first educational piece, <a href="#"><i>Discover the Hidden Value of Packaging</i></a>, is available for at no charge. This brochure explains how the thoughtful use of packaging actually helps prevent waste and saves energy. An objective, science-based approach reveals that packaging protects the economic, environmental, and social value of the products it contains.</p> <p>AMERIPEN's Recovery Work</p>	<p>Optimized utilization of existing resources.</p> <p>Reduced use of virgin materials.</p> <p>Recovery of the inherent value of used material to optimize performance metrics of energy and material costs.</p> <p>Optimize operations to</p>	<p>Collaboration among stakeholders.</p> <p>Resources</p>	<p>Organizational structure that addresses need for collaboration.</p> <p>Technical Advisory Group provides link to all major packaging trade associations, universities, NGOs, local, state and federal government agencies.</p> <p>Government Affairs Committee – with a</p>

<p>develops positions on issues related to packaging and the environment for purposes of stakeholder dialogue and governmental interaction. These issues include the environmental impact, marketing, sourcing, manufacture, and distribution of packaging throughout its lifecycle. AMERIPEN engages and collaborates with existing industry organizations to leverage their expertise in areas of:</p> <ul style="list-style-type: none"> <li>analyzing the environmental and social effects of packaging</li> <li>creating a better understanding of the role of packaging</li> <li>minimizing the environmental impact of packaging</li> </ul>	<p>of packaging</p> <ul style="list-style-type: none"> <li>increase the recovery of used packaging</li> <li>analyze varied approaches and alternatives to extended producer responsibility for packaging (EPR).</li> </ul> <p>Relying on sound scientific principles and technical information, committees and project teams may develop recommendations, guidance documents, technical information, business proposals, or other information for consideration by the Board of Directors and the AMERIPEN voting membership. At the direction of the Board of Directors, they may also develop and implement operational projects.</p>	<p>Group has launched its Product Recovery Knowledge Map (PRKM). This matrix of metrics is a web-based knowledge mapping tool designed to house data in a searchable, interactive way, and it is the largest known collection of available information surrounding the recovery of packaging materials. Unlike a typical findings report, the PRKM provides a first-of-its-kind compilation of packaging data across all phases of the recovery system, for use in guiding future projects. The PRKM is initially available only to AMERIPEN members.</p>	<p>achieve low cost, high quality materials for entry to the material supply stream.</p> <p>Improve environmental performance of packaging materials.</p>		<p>mission to lobby and influence legislation in favor of environmentally responsible policies.</p> <p>Resource Development Committee – with a mission to secure resources to support the work of AMERIPEN Project Teams.</p>
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<p><b>State of California</b> California has nearly 38 million residents and ranks among the top 10 economies in the world based on GDP. It is home to numerous companies all along the</p>	<p>75% of solid waste generated statewide must be “source-reduced, recycled or composted” by 2020. (New metric replaces “diversion” and “disposal reduction”; local jurisdictions and state agencies still mandated to divert 50% of waste from landfills). Separate 80% recycling goal for beverage containers. Producers must meet minimum postconsumer recycled content for rigid plastic packaging containers (25%, or alternative compliance), glass containers (35%), and plastic trash bags (10%). At least 50% of</p>	<p>65% statewide landfill “diversion rate equivalent.” Most RPPC and glass container manufacturers are in compliance. Many trash bag manufacturers and wholesalers are not in compliance. About 70% of newsprint “consumers” are in compliance (most others exempted). About 60% of all State agency purchases are</p>	<p><a href="#">California’s new 75% law</a> includes mandated commercial and multi-family residence recycling.</p> <p><a href="#">Strategies under discussion for sourcing additional materials</a> range</p>	<p>Wide range of barriers and opportunities, depending on category.</p>	<p>CalRecycle has begun to solicit input on achieving the State’s new 75% goal. <a href="#">Possible strategies, including those related to packaging and</a></p>

<p>packaging and printed materials supply chains. CalRecycle is the primary State agency charged with implementing or overseeing California’s many programs and laws related to packaging.</p>	<p>newsprint purchased by publishers must contain a minimum of 40% postconsumer fiber. State agencies must purchase recycled-content products in specified categories, which may include packaging and printed materials. (Related: Toxics in Packaging law prohibits 4 toxic heavy metals.)</p> <p><u>Methodology:</u></p> <ul style="list-style-type: none"> <li>• <a href="#">For measuring 75% goal</a></li> <li>• <a href="#">For enforcing local 50% diversion mandates</a></li> <li>• <a href="#">Beverage container recycling rates and methodology</a></li> <li>• <a href="#">RPPC program compliance methods</a></li> <li>• <a href="#">Glass container minimum content – formula in statute at §14549</a></li> <li>• <a href="#">Plastic trash bag compliance methods</a></li> <li>• <a href="#">Recycled-Content Newsprint Program requirements</a></li> <li>• <a href="#">State agency buy-recycled requirements</a></li> </ul>	<p>compliant with recycled-content provisions (sum of all categories and agencies).</p> <p><u>Methodology:</u></p> <ul style="list-style-type: none"> <li>• <a href="#">Comparison of new 75% goal (AB 341) with current diversion rates (AB 939 methodology)</a></li> <li>• <a href="#">RPPC program compliance status</a></li> <li>• <a href="#">Glass minimum content report</a></li> <li>• <a href="#">Trash bag compliance status</a></li> <li>• <a href="#">Recycled-Content Newsprint Program compliance status</a></li> <li>• <a href="#">State agency buy-recycled summary report</a></li> </ul>	<p>from packaging EPR; to targeted incentive payments; to augmenting existing beverage container, minimum-content and procurement programs.</p>		<p><a href="#">printed materials.</a></p>
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<p><b><u>Carton Council</u></b> Group of four carton manufacturers united to deliver long term collaborative solutions in order to divert</p>	<p>Objective: Increase carton recycling in the U.S. by expanding recycling access and infrastructure for post-consumer poly-coated cartons.</p> <p>a) our current goal is to reach 50% access by 2015 b) the access campaign will continue – future goals to be</p>	<p>Q2 2012, 38.3% of U.S. households had access to carton recycling .</p> <p><u>Methodology:</u> The Carton Council (CC) verifies household across</p>	<p>The Carton Council’s Carton Recycling access program will focus on the residential stream.</p> <p>The Carton Council</p>	<p>Before CC was set up, the main barriers were:</p> <ul style="list-style-type: none"> <li>• Low volume and perceived market value.</li> <li>• Limited access to domestic end markets.</li> <li>• Poor perception of recyclability of carton.</li> <li>• No industry alignment on carton recycling goals.</li> </ul> <p>With CC, we are implementing a strategy</p>	<ul style="list-style-type: none"> <li>• Need for alignment, cooperation, partnership between various action-driven organizations across the packaging and printing/writing paper spectrum (AMERIPEN, AAR, AFPA)</li> </ul>

valuable cartons from the landfill.	<p>determined</p> <p>c) We have a focus first on building access, then will turn our efforts towards building volume — to “build the pipeline and fill the pipeline”.</p> <p><u>Methodology:</u> We have identified 4 areas of focus:</p> <ul style="list-style-type: none"> <li>• Build end-market demand for post consumer cartons in the US</li> <li>• Build recycling infrastructure by partnering with MRFs across US</li> <li>• Build carton recycling access by linking communities and haulers to MRFs that take cartons.</li> <li>• Promotion and education in cities where carton recycling access is in place</li> </ul>	<p>the country using a database that includes each municipality as well as unincorporated areas and counties. If carton recycling access can be documented the web link is placed on the CC website <a href="http://www.recyclecartons.com">www.recyclecartons.com</a> and the households for that community are added to the carton recycling access database.</p>	<p>supports schools recycling programs to drive school districts, haulers and MRFs to capture additional volumes.</p>	<p>that overcomes most of these barriers.</p> <p>New barriers we now are evaluating:</p> <ul style="list-style-type: none"> <li>• MRF capacity i.e. development and/or expansion on MRFs as well as upgrading MRF technology and capacity utilization through increased volume</li> <li>• Underperforming curbside collection infrastructure where lack of convenience, limited bin size and weak participation incentives limit collection potential in many programs and also negatively impacts the long-term cost efficiency of these curbside programs.</li> <li>• Example include: access to convenient recycling collection is limited in many areas of the country – curbside service is not available to the full range of households if could feasibly be offered to; some collection practices, in conjunction with poor education, can contribute to contamination, which produces high yield loss and decreases financial return; and the full range of recyclable packaging material types is not always (or “is rarely”) collected curbside.</li> </ul>	<ul style="list-style-type: none"> <li>• Need for industry commitment to fund the collection and processing optimization efforts on a voluntary basis (e.g. support change from bins to carts)</li> <li>• Need for support for policy mechanisms such as landfill bans and local participation incentives (PAYT, mandatory recycling and participation incentives)</li> <li>• Need for more main stream, unified, consistent education on curbside recycling participation.</li> </ul>
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<u>Coca Cola</u>	<ul style="list-style-type: none"> <li>• Improve packaging material efficiency per liter of product sold by 7% compared with a 2008 baseline by 2015.</li> <li>• Recover 50% of the equivalent bottles and cans used annually by 2015.</li> <li>• Source 25% of PET plastic from recycled or renewable material</li> </ul>	<ul style="list-style-type: none"> <li>• Currently, 36% of bottles and cans used recovered.</li> <li>• 7 billion PlantBottle packages have shipped since the end of 2011.</li> </ul>		<i>Not provided.</i>	Refer to the <a href="#">2010/2011 Sustainability report</a> .

	by 2015  <u>Methodology:</u> <i>Not provided.</i>	<u>Methodology:</u> <i>Not provided.</i>			
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<u>ConAgra</u>	<p><b>Packaging goals for 2015:</b></p> <ul style="list-style-type: none"> <li>Reduce packaging by 10% per pound of product produced.</li> <li>Increase the amount of packaging made from renewable resources from 45% to more than 50%.</li> <li>Increase the use of recycled content in packaging by 25%.</li> </ul> <p><u>Methodology:</u> <i>Not provided.</i></p>	<i>Not provided.</i>	<i>Not provided.</i>	<i>Not provided.</i>	Refer to the <a href="#">2011 Corporate Responsibility Report</a> .

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<u>Container Recycling Institute (CRI)</u>	<p>CRI's mission is to make North America a global model for the collection <i>and</i> quality recycling of packaging materials. We do this by:</p> <ul style="list-style-type: none"> <li>Creating and maintaining a database on containers and packaging.</li> <li>Studying container and packaging reuse and recycling options and legislation, including deposit systems, and their environmental and economic impacts.</li> <li>Educating on recycling options for government, elected officials, for citizen groups, the</li> </ul>	<p>Ten U.S. states currently have beverage container deposit legislation (CA, CT, HI, IA, MA, ME, MI, NY, OR, VT).</p> <p>Current recycling rates for major beverage container material types: (EPA, MSW 2010; CRI 2008 report)</p> <ul style="list-style-type: none"> <li>Aluminum National: 50% (2010) Deposit states, (2006): 76% Other States, (2006): 35%</li> <li>PET National (2010): 21% or 29% Deposit states, (2006): 44%</li> </ul>	N/A	N/A	<ul style="list-style-type: none"> <li>Research "best in class" programs; educate on best practices; assist with technical data.</li> <li>Emphasis on high-quality materials that are able to achieve the promise of recycling, which is replacement of virgin materials in the manufacturing process.</li> <li>Programs are paid for by consumers and producers, not taxpayers and ratepayers</li> </ul>



	print and broadcast media, publications and industry groups. <ul style="list-style-type: none"> <li>• Creating national networks.</li> </ul>	Other states (2006): 14% <ul style="list-style-type: none"> <li>• Glass</li> </ul> National (2010): 33%         Deposit states, (2006): 64%         Other states (2006): 12%			
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<b><u>Glass Packaging Institute (GPI)</u></b> Trade association representing the North American glass container industry. GPI member companies manufacture glass containers for food, beverage, cosmetic and many other products.	50% recycled content in new bottles and jars by 2013  <u>Methodology:</u> <i>Not provided.</i>	<i>Not provided.</i>	<i>Not provided.</i>	<u>Data</u> - Not enough is known about what happens to recyclables after they are collected until final disposition. Understanding where this material ends up is critically important for the glass container industry, as utilization of recycled glass helps our industry compete globally and work within the confines of the Clean Air Act.	<ul style="list-style-type: none"> <li>• Recycling Systems - Through our glass recycling (cullet) suppliers, we understand that glass faces significant challenges during the sorting process when collected jointly with numerous other types of recyclables. GPI believes that a "positive" sort (removing glass off the line as soon as possible), provides the best chance for recycled glass to return to the consumer as a manufactured product. Investment in the latest sorting technology at the MRFs also provides a better chance for glass to return to a manufactured product, such as a container.</li> <li>• Consumer Incentive Programs - Where feasible, expanding the scope of consumer incentive programs and putting new ones in places increases the likelihood of glass collected for recycling returning into a new manufactured product. Roughly 80%-85% of recycled glass used in our manufacturing process comes from these programs</li> </ul>

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<b><u>Kimberly-Clark Corp.</u></b>	Reduce packaging impact by 20% by 2015 vs. 2010 baseline year.	On track after 1 year. 4% reduction for 2011.	<ul style="list-style-type: none"> <li>• Packaging weight reductions.</li> <li>• Increase use of</li> </ul>	<ul style="list-style-type: none"> <li>• Need to maintain packaging functionality and</li> </ul>	<ul style="list-style-type: none"> <li>• Partnerships with packaging suppliers.</li> <li>• Synergy with Kimberly-</li> </ul>



	<u>Methodology:</u> Impact measured by CO2 equivalents.	<u>Methodology:</u> Calculate reduction efforts as CO2(eq) using externally vetted conversion factors.	recycled materials where feasible.	aesthetics. • Payback on capital investments.	Clark cost savings goals.
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<b><u>Kraft Foods</u></b>	Eliminate 50,000 metric tons (100 million lbs.) of packaging material between 2010 – 2015.  <u>Methodology:</u> <i>Not provided.</i>	Reduced total packaging used by 20,500 metric tons since 2010.  <u>Methodology:</u> <i>Not provided.</i>	<i>Not provided.</i>	<i>Not provided.</i>	Refer to the <a href="#">2011 Sustainability Report</a> .

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<b><u>State of Maine</u></b>	50% overall recycling rate for MSW annually  <u>Methodology:</u> <i>Not provided.</i>	38.7% recycling rate (2010)  <u>Methodology:</u> <i>Not provided.</i>	<i>Not provided.</i>	<i>Not provided.</i>	<i>Not provided.</i>

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<b><u>State of Minnesota</u></b>	Goals in statute (enacted in 1989, amended in 1996): • 35 percent of MSW to be recycled in Greater Minnesota Counties by 1996. • 50 percent of MSW to be recycled in Metropolitan Counties by 1996.  <u>Methodology:</u> <i>Not provided.</i>	43.2 percent recycling rate (2010) .  Per capita MSW generation rate of 1.062 tons annually (2010).	<i>Not provided.</i>	<i>Not provided.</i>	<i>Not provided.</i>

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<p><b><u>National Association for PET Container Resources (NAPCOR)</u></b></p> <p>Trade association for the PET plastic packaging industry in the United States and Canada. Members are manufacturers of PET resin, PET bottles, and PET sheet and thermoformed packaging, as well as suppliers to the PET industry.</p>	<p>48% recycling rate for PET bottles by the end of 2013.</p> <p><u>Methodology:</u> Calculation of the amount of PET bottles necessary to meet demand of existing investments in the PET reclamation sector.</p>	<p>29% gross PET Bottle recycling rate; 21% PET Bottle Utilization Rate in 2010.<sup>1</sup>(NAPCOR 2011)</p> <p><u>Methodology:</u> <a href="#">Market survey</a></p>	<p>Expansion of existing collection programs fostered by additional public policy tools</p>	<p>Public policy is necessary to growth; uncertainty of legislative process and resistance from key stakeholders is a barrier.</p>	<p>Work with other materials groups, industry associations and stakeholders to formulate effective public policy.</p>

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<p><b><u>Nestle Waters North America (Nwana)</u></b></p> <p>With 36 years' experience in the bottled water segment, Nestlé Waters has a diverse U.S. portfolio, including six regional spring water brands, three international brands, and Nestlé Pure Life, its nationally distributed purified bottled water. The company's dedication to quality, employee</p>	<p>In 2008, we <a href="#">pledged</a> to reach a 60% recycling rate for PET beverage containers by 2018.</p> <p>NWNA believes implementation of statewide EPR legislation for packaging and printed paper is the best path forward to improve recycling rates for all packaging, across the United States.</p> <p>Through EPR, NWNA hopes to bring the financial responsibility of recycling to the industry, while collaborating with governments and providers to increase access to curbside recycling and recycling away from home, not just for bottles,</p>	<p>There is enormous demand for recycled PET plastic used for soda and water bottles, yet recyclers have been unable to increase supplies with existing recycling programs; PET recycling rates languish at a paltry 29%.</p> <p><u>Methodology:</u> In addition to our work with Future 500, Nestlé Waters directly supports the efforts of <a href="#">Recycling Reinvented</a>, a U.S. nonprofit organization committed to advancing recycling rates for packaging and</p>	<p>NWNA plans on recouping more plastic through more effective and efficient recycling system for packaging by using an EPR model to increase access to curbside recycling and recycling away</p>	<ul style="list-style-type: none"> <li>• Current recycling systems differ from state-to-state – some are in better shape than others, with some states sending too many recyclable products to landfills, and others consistently working to increase their recycling rates.</li> </ul>	<p>As mentioned, implementing EPR for packaging and printed paper in the U.S. will require collaboration across a broad range of stakeholder groups, including consumer product companies, beverage companies, trade associations,</p>

<sup>1</sup> Gross recycling rate includes the total amount of PET collected for recycling and sold; Utilization rate refers to the amount of clean flake produced from PET bottles recycled; the difference between the gross recycling rate and the utilization rate is the yield loss.

<p>development, creating shared value in communities and environmental stewardship—especially in the areas of water use, energy and packaging—have led Nestlé Waters to the number one bottled water position in the U.S.</p>	<p>but for all product packaging.</p> <p><u>Methodology</u>: To be successful, EPR demands collaboration with a broad range of stakeholder groups. One stakeholder group we’ve been working deeply with is <a href="#">Future 500, a nonprofit</a> that bridges corporations and sustainability advocates, which has brought together more than 30 organizations to talk about the best attributes of an EPR model in the United States, and how to craft and successfully pass state-level legislation. We hope to move legislation in key states in 2013.</p>	<p>printed paper in the U.S. through an EPR model, both through seed funding and Nwana CEO Kim Jeffery’s leadership as a member of the organization’s board.</p> <p>In order to build out EPR there needs to be state-level legislation that creates a foundation from which brand owners can lead. The models proposed by Recycling Reinvented do not envision new infrastructure – rather they rely on and enhance existing curbside infrastructure as well as drop-off locations in rural areas.</p>	<p>from home.</p>	<ul style="list-style-type: none"> <li>• Broad consensus needed across various groups of stakeholders.</li> <li>• Perception that EPR will increase costs for brands and consumers.</li> </ul>	<p>commodity groups, private haulers, municipalities, state legislatures, environmental NGOs, grocery and other retailers, the forest product industry and more. <a href="#">Recycling Reinvented</a> is bringing those stakeholders together for an informed discussion.</p>
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<p><b><u>Northwest Product Stewardship Council (NWPC)</u></b>  A <a href="#">coalition of government organizations</a> in Washington and Oregon that operates as an unincorporated association of members and is comprised of a Steering Committee, Associates and Subcommittees. The mission of the NWPC is to work together and with other governments, businesses and nonprofit groups to integrate product stewardship (producer responsibility) principles into the policy and economic structures of the Pacific Northwest.</p>	<ul style="list-style-type: none"> <li>• Divert more materials from disposal to recycling.</li> <li>• Utilize existing public and private sector collection and processing infrastructure.</li> <li>• Shift the financing to manufacturers.</li> </ul>	<p>The purpose of NWPC 2011 report, <a href="#">Analyzing Product Stewardship Policies for Packaging and Printed Paper in Washington State</a>, is to stimulate dialogue among the various stakeholders in the solid waste and recycling systems in Washington State and to examine alternative ways to finance and incentivize recycling programs in the state. The goal of the dialogue would be to help identify and craft viable opportunities to move toward increased recycling of packaging and printed paper in Washington.</p>	<p>N/A</p>	<p>N/A</p>	<p>N/A</p>

Company	Goals (including timeline and methodology)	Current status (including methodology)	Expected source of new material	Identified barriers	Strategy to overcome barriers
<b>Owens – Illinois, Inc. (O-I)</b> World’s leading glass packaging designs manufacturer with 81 plants operating in 21 countries. Uses more post-consumer glass (4.5 million tonnes) than any other glass-container maker.	Global average of 60% recycled content in all O-I plants.  <u>Methodology:</u> <i>Not provided.</i>	On average, O-I plants use approximately 37% post-consumer recycled glass in production.  <u>Methodology:</u> <i>Not provided.</i>	<i>Not provided.</i>	<ul style="list-style-type: none"> <li>• Glass yield loss from single stream collection and processing.</li> <li>• Perceived lack of market value for recycled glass.</li> </ul>	<ul style="list-style-type: none"> <li>• “Positive sort” MRF.</li> <li>• Broad engagement in solid waste value.</li> <li>• Community outreach and education to influence waste practices.</li> </ul>

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<b>PAC NEXT</b> Founded in 2011 as an initiative of PAC – The Packaging Association (founded in 1950) to lead the economic recovery of discarded packaging in North America. PAC is an industry funded, not-for-profit, material & package neutral corporation. Core member values services include: Sustainability, education, networking, packaging for food safety and PAC NEXT.  PAC and PAC NEXT are catalysts representing over 1800 and 100 respective members for the sole purpose of meeting its goals. PAC NEXT functions in a transparent collaborative way and no one is excluded. Your voice will be heard.  Membership comes from North	<p><b>Vision</b> A world without packaging waste.</p> <p><b>Mission</b> To facilitate the convergence of ideas and identify sustainable solutions that lead to zero packaging waste.</p> <p>To be a catalyst to foster transparent collaboration and connections.</p> <p>To unite leading organizations across the packaging value chain to collaboratively</p>	<p>To facilitate the journey towards a world without packaging waste.</p> <p>Member led projects</p> <p><u>Six Initial Projects:</u></p> <ol style="list-style-type: none"> <li>I. Systems Optimization</li> <li>II. Materials Optimization</li> <li>III. Consumer Engagement</li> <li>IV. Sustainable Innovation</li> <li>V. Policy Best Practices that Support Harmonization</li> </ol>	N/A	<ul style="list-style-type: none"> <li>• Lack of catalyst to provide transparent, collaboration across supply chain.</li> <li>• Lack of financial support.</li> <li>• Project management and technical resources.</li> <li>• Technology not changing at the recovery end. Low cost and convenience of landfill. Lack of economical reprocessors and</li> </ul>	<ul style="list-style-type: none"> <li>• PAC NEXT initiative, membership and process. Strong retail and CPG leadership.</li> <li>• Increase membership, create revenue stream activities including seminars and education, member support for projects.</li> <li>• Member led projects and association alliances.</li> <li>• Project 1. Build sector alliances.</li> </ul>

<p>American organizations involved in the start and end of life of packaging including: grocery and quick service retailers; consumer packaged goods manufacturers; raw material &amp; package converters; recovery of discarded packaging processors; government; NGO's; trade associations; academic Institutions and students.</p>	<p>explore, evaluate and mobilize innovative packaging end-of-life solutions.</p> <p>Projects timelines 12 to 18 month project cycle.</p>	<p>VI. Sustainability Design Guide</p> <p>12 to 18 month project cycle engaging stakeholders throughout the value chain.</p>		<p>solutions.</p> <ul style="list-style-type: none"> <li>• Industry adoption of design for sustainable best practices. (i.e., competing priorities, DfE vs DfR). Lack of end of life markets.</li> <li>• Lack of consumer understanding and engagement.</li> <li>• Lack of Policy Harmonization.</li> </ul>	<ul style="list-style-type: none"> <li>• Projects #2, 4 &amp; 6. Build industry alliances.</li> <li>• Project #3. Build municipality alliances.</li> <li>• Project #5. Build government alliances.</li> </ul>
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Company	Goals (including timeline and methodology)	Current status (including methodology)	Expected source of new material	Identified barriers	Strategy to overcome barriers
<u>PepsiCo</u>	<p>In 2009, PepsiCo committed to help increase the U.S. beverage container recycle rate to 50% by 2018.</p> <p><u>Methodology:</u> Not provided.</p>	Not provided.	PepsiCo Dream Machine.	Not provided.	Refer to the <a href="#">2010 Sustainability report</a> .

Company	Goals (including timeline and methodology)	Current status (including methodology)	Expected source of new material	Identified barriers	Strategy to overcome barriers
<u>Procter &amp; Gamble</u>	<ul style="list-style-type: none"> <li>• Reduce packaging by 20% per consumer use against a 2010 baseline by 2020.</li> <li>• Eliminate PVC use in packaging.</li> <li>• In the long-term, use 100% renewable or recycled materials for all products and packaging.</li> </ul> <p><u>Methodology:</u> Not provided.</p>	<p>PVC is used in less than 1.5% of P&amp;G's plastic packaging materials – the company expects to eliminate all remaining uses of PVC in its packaging within the next few years.</p> <p><u>Methodology:</u> Not provided.</p>	Not provided.	Not provided.	Refer to the <a href="#">2011 Sustainability Report</a> .

Organization	Goals (including timeline and methodology)	Current status (including methodology)	Expected source of new material	Identified barriers	Strategy to overcome barriers
<p><b>Product Policy Institute (PPI)</b> Since 2003, <a href="#">Product Policy Institute</a> has worked to make extended producer responsibility (EPR) the central approach to designing and managing products and packaging, so that market forces drive green design and the use and reuse of safer chemicals and more sustainable materials. We develop policies and educational materials, and network key stakeholders to assist public interest advocates, government officials, leading companies and citizens to advocate for producer responsibility initiatives.</p>	<p>Establish 100% producer responsibility as the primary approach for managing all types of discarded packaging (for a majority of the nation's people by 2020). Policy achieves material specific recycling goals of 75% for each container material type. Policy explicitly discourages waste incineration. Policy is designed to drive source reduction of packaging materials, while also phasing out the use of non-recyclable packaging.</p> <p>Require recovered packaging to be put to its highest and best use. Ensure EPR packaging systems yield clean streams of materials that can be utilized by domestic manufacturers to grow American jobs and promote local economic development.</p>	<ul style="list-style-type: none"> <li>• 0% - legislation to be introduced in the next several years.</li> <li>• Hard to define exact percentage. Some packaging types - i.e. aluminum - are typically recycled into similar high-value products, meaning that the collection process does not degrade the value of the materials. Many others packaging types are degraded through current collection and sorting processes, yielding lower value materials and downcycled products.</li> </ul>	<p>New investment in packaging redesign, recycling infrastructure, consumer education and marketing will boost recycling.</p>	<ul style="list-style-type: none"> <li>• Primarily opposition from consumer packaged goods companies and companies/organizations that are entrenched in the status quo of municipally-financed recycling. Policy issues are numerous, but ensuring transparency, accountability and incentives/penalties to ensure results are achieved, will be critical.</li> <li>• Entities that finance recycling systems have incentives to create lowest cost system which may not ensure that packaging material types are put to their highest and best use.</li> </ul>	<p>PPI is working to build literacy and support from stakeholders in targeted states and nationally, among groups that can have an impact, while developing legislative language that achieves social and environmental goals through EPR. Among other strategies, we are also working to develop and include provisions that help grow markets for environmentally preferable packaging, products and materials; that require accountability and transparency, and ensure the public's right to know; and that ban packaging from disposal in solid waste landfills and incinerators.</p> <p>EPR policy has utilization requirements that delivery of recycled materials should be used as standalone material input, as a replacement for, or supplement to, raw materials. Monitor implementation to ensure results are achieved.</p>

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<p><b>Recycling Reinvented</b> Nonprofit</p>	<p>A successful EPR model would require</p>	<p>Recycling Reinvented and its partner, Nestle</p>	<p>N/A</p>	<p>EPR for packaging and paper is a new approach in the U.S.</p>	<p>Recycling Reinvented has a draft white paper that lays out the basics</p>



organization committed to increasing recycling rates of waste packaging and printed material in the United States through an extended producer responsibility (EPR) model.	state-level legislation, and we are working to build the capacity of stakeholders in several states to advocate for EPR. The earliest date when legislation could be considered is 2013.	Waters North America, have been speaking publicly and privately to nearly 100 stakeholders, including major consumer brands, about the initiative during 2012.		Many American companies are not yet familiar with the costs and benefits of EPR compared to our current recycling system. Recycling advocates have been interested in EPR for years but are now looking at the details to see how it might change their current programs.	of how EPR would work in the U.S., while acknowledging that many of the details will be dependent on what major stakeholders are willing to support. We are drafting "scenarios" for current recycling stakeholders to show how their operations and financing might change under different versions of EPR.
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Company	Goals (including timeline and methodology)	Current status (including methodology)	Expected source of new material	Identified barriers	Strategy to overcome barriers
<b><u>Starbucks Coffee Company</u></b>	<p>Goal: Declare Starbucks single-serve cups “recyclable” by 2015.</p> <p><u>Methodology:</u> Access (in our stores, public spaces, homes and offices) to recycling services in at least 75% of the communities where Starbucks operates. This conforms with FTC’s definition of recyclability as “access” to services.</p> <p>Goal: Provide customer facing recycling in 100% of our company owned stores by 2015.</p> <p><u>Methodology:</u> Store count of front-of-house (FOH) recycling/composting services for our customer-</p>	<p>Recyclable Cup: Currently calculating status.</p> <p><u>Methodology:</u> Percentage of population with access to cup recycling in Starbucks stores, residential curbside, public spaces and offices (the last is more difficult to quantify).</p> <p>FOH Recycling Services: Currently 15% of company-owned stores in the US and Canada provide FOH recycling.</p>	<p>Starbucks stores, and eventually other QSR brands’ store fronts (as part of collaborative effort with Foodservice Packaging Institute, National Restaurant Association and other stakeholders).</p> <p>Residential curbside recycling programs, as more begin to accept coated foodservice paper packaging.</p>	<ul style="list-style-type: none"> <li>• Historic perceived barriers to recyclability of the product (coatings, food contamination, etc.) that have minimized demand for the products from end users.</li> <li>• No defined paper grade, and subsequently no commodity pricing for “post consumer coated foodservice packaging” (PCFSP).</li> <li>• Lack of collection infrastructure.</li> <li>• Lack of scale of product to offer the recycling markets.</li> <li>• Patchwork of policies, access to markets, infrastructure, retailer participation, financial incentives, consumer awareness that all inhibit</li> </ul>	<ul style="list-style-type: none"> <li>• Mill tests of truckload quantities of paper cups &amp; coated foodservice packaging.</li> <li>• Acceptance of PCFSP in an existing paper grade, while determination is made whether to pursue a separate grade.</li> <li>• Create demand pull from end users that will justify (if any) investments in collection and processing infrastructure.</li> <li>• Engagement with broader coalitions (FPI, NRA, USCM, state recycling orgs, etc.) to include more stakeholders, test precedent-setting solutions and create scale.</li> </ul>



	generated waste (Starbucks already as comprehensive back-of-house recycling services for OCC, HDPE, coffee grounds).	<u>Methodology:</u> Store count.		scalability and harmonization.	
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Organization	Goals (including timeline and methodology)	Current status (including methodology)	Expected source of new material	Identified barriers	Strategy to overcome barriers
<p><b>Steel Recycling Institute (SRI)</b> Industry association that promotes and sustains the recycling of all steel products. North American steel companies and the American Iron and Steel Institute (AISI) and its associate members directly support the efforts of the Steel Recycling Institute. AISI's member companies represent over 75 percent of both U.S. and North American steel capacity.</p>	<p>SRI targets ongoing, incremental growth through education of the public, recycling coordinators, waste haulers, scrap processors and elected officials.</p> <ul style="list-style-type: none"> <li>• Direct interface with recycling stakeholders via regional recycling managers.</li> <li>• Public outreach through web, social media, blogs, trade and other media.</li> <li>• Educating future recyclers through standards-based curricula for ages pre-k through grade 12.</li> </ul>	<p>67% recycling rate for steel packaging. (Steel Recycling Institute, 2010)</p> <p><u>Methodology:</u> This is derived from the ratio of steel can tonnage recovered to the new steel can manufactured in a given year, in this case, 2010.</p>	<p>Steel food cans from households, also diverted from waste-to-energy facilities.</p>	<p>Increased participation and education of packaging consumers.</p>	<p>SRI works with associations, producers, packagers and other materials to increase awareness through a variety of outreach strategies. In addition, SRI also is looking to capture other, non-traditional forms of packaging, including steel aerosol cans. Thanks to direct interface with recycling coordinators and scrap processors, SRI is building a market and process for capturing this additional source of steel scrap.</p>

Organization	Goals (including timeline and methodology)	Current status (including methodology)	Expected source of funding	Identified barriers	Strategy to overcome barriers
<p><b>GreenBlue's Sustainable Packaging Coalition (SPC).</b> GreenBlue is a nonprofit that equips business with the science and resources to make products more sustainable. The Sustainable Packaging Coalition (SPC) is an</p>	<p>All packaging:</p> <ul style="list-style-type: none"> <li>• Is beneficial, safe &amp; healthy for individuals and communities throughout its life cycle;</li> <li>• Meets market criteria for both performance and cost;</li> <li>• Is sourced, manufactured, transported, and recycled using</li> </ul>	<ul style="list-style-type: none"> <li>• COMPASS.</li> <li>• Guidelines for Recycled Content Reports (Fiber &amp; Plastic).</li> <li>• Design for Recovery Guides (through the Closing the Loop</li> </ul>	<p>Participating SPC member companies (annual dues); sales of resources (such as reports and COMPASS tool); grants.</p>	<ul style="list-style-type: none"> <li>• Too many uncoordinated initiatives.</li> <li>• Lack of data to accurately measure progress.</li> <li>• Lack of understanding in the packaging</li> </ul>	<ul style="list-style-type: none"> <li>• Supply chain collaboration.</li> <li>• Science-based information and action enabler.</li> <li>• Increasing data availability.</li> <li>• Education through meetings,</li> </ul>

industry working group dedicated to a more robust environmental vision for packaging. Through strong member support, an informed and science-based approach, supply chain collaborations and continuous outreach, we endeavor to build packaging systems that encourage economic prosperity and a sustainable flow of materials.	renewable energy; <ul style="list-style-type: none"> <li>Optimizes the use of renewable or recycled source materials;</li> <li>Is manufactured using clean production technologies and best practices;</li> <li>Is made from materials healthy throughout the life cycle;</li> <li>Is physically designed to optimize materials and energy;</li> <li>Is effectively recovered and utilized in biological and/or industrial closed loop cycles.</li> </ul>	Project). <ul style="list-style-type: none"> <li><i>Closing the Loop: Road Map for Effective Material Value Recovery.</i></li> </ul>		industry regarding important issues such as biodegradation, actual recyclability, and funding mechanisms.	webinars, and reports.
<b><u>Sustainable Packaging Coalition- How2Recycle Label</u></b>	<ul style="list-style-type: none"> <li>Increased adoption every year; widespread adoption of How2Recycle Label by 2015.</li> <li>Heightened consumer awareness &amp; behavioral change.</li> <li>Market-wide compliance with FTC requirements.</li> </ul>	<ul style="list-style-type: none"> <li>Currently there are 11 participating companies.</li> <li>Majority of consumers have had a positive experience with the label; behavioral change; and/or positive view of the company using the label.</li> </ul>	A combination of SPC member dues, participating company contributions, and partnerships.	<ul style="list-style-type: none"> <li>Local recycling variability.</li> <li>Space on packages.</li> <li>Legal team apprehension.</li> <li>Lack of reasonably-priced access to recycling baseline information</li> </ul>	<ul style="list-style-type: none"> <li>Encouraging consumers get to know their local systems.</li> <li>Working with partners on recycling awareness.</li> <li>Working with partners to increase infrastructure.</li> </ul>

Company	Goals (including timeline and methodology)	Current status (including methodology)	Expected source of new material	Identified barriers	Strategy to overcome barriers
<b><u>Unilever</u></b>	Overall goal: Halve the waste associated with the disposal of our products by 2020. <ul style="list-style-type: none"> <li>By 2020, reduce the weight of packaging that we use by a third through lightweighting materials optimizing structural and material design developing concentrated versions of our products eliminating unnecessary packaging.</li> <li>Provide consumers with refills in our home and personal care portfolio to make it</li> </ul>	<i>Not provided.</i>	<i>Not provided.</i>	<i>Not provided.</i>	Outlined in <a href="#">Unilever's Sustainable Living Plan</a>

	<p>possible to reuse the primary pack.</p> <ul style="list-style-type: none"> <li>Working in partnership with industry, governments and NGOs, we aim to increase recycling and recovery rates on average by 5% by 2015 and by 15% by 2020 in our top 14 countries<sup>2</sup>. For some this means doubling or even tripling existing recycling rates.</li> <li>By 2020, increase the recycled material content in our packaging to maximum possible levels. This will act as a catalyst to increase recycling rates.</li> </ul> <p><u>Methodology:</u> Our environmental targets are expressed against a baseline of 2008 and on a 'per consumer use' basis. This means a single use, portion or serving of a product. We set our baseline by calculating the waste from over 1,600 representative products. We did this at an absolute level as well as on a per consumer use basis 14 countries. The calculation covers 70% of our volumes.</p>				
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Agency	Goals (including timeline & methodology)	Current status (including methodology)	Expected source of new material	Identified barriers	Strategy to overcome barriers
<u>State of Vermont</u>	Divert 50% of MSW by 2005.	~35% diversion as of 2009.	<i>Not provided.</i>	<i>Not provided.</i>	<a href="#">Act 148, Universal Recycling Law.</a>

Company	Goals (including timeline and methodology)	Current status (including methodology)	Expected source of new material	Identified barriers	Strategy to overcome barriers
<u>Walmart</u>	<ul style="list-style-type: none"> <li>Reduce packaging by 5% globally by 2018 compared to a 2008 baseline.</li> <li>Eliminate PVC from private brand packaging in the U.S. by October 2007.</li> <li>Be packaging neutral globally by 2027.</li> </ul> <p><u>Methodology:</u> Walmart developed a packaging scorecard for suppliers in 2006.</p>	<i>Not provided.</i>	<i>Not provided.</i>	<i>Not provided.</i>	Refer to the <a href="#">2012 Global Responsibility Report.</a>

<sup>2</sup> The top 14 countries are: USA, Brazil, India, United Kingdom, Germany, France, Italy, Indonesia, Netherlands, South Africa, China, Turkey, Mexico, and Canada

Agency	Goals (including timeline)	Current status	Expected source of new material	Identified barriers	Strategy to overcome barriers
<b><u>Washington State</u></b>	50% recycling rate for MSW by 2007.  <u>Methodology:</u> <i>Not provided.</i>	54.3% recycling rate (2010); approximately 40% recycling rate for containers  <u>Methodology:</u>	<i>Not provided.</i>	<i>Not provided.</i>	Since 1984, Washington has followed a <a href="#">waste hierarchy that puts waste reduction above recycling.</a>

Agency	Goals (including timeline)	Current status	Expected source of new material	Identified barriers	Strategy to overcome barriers
<b><u>City of Tacoma, Washington</u></b>	75% diversion by 2030.  Annual reductions in per capita waste generation.	<i>Not provided.</i>	Multi-family recycling, completion of variable rate implementation.	<ul style="list-style-type: none"> <li>Population mobility in Multi-family.</li> <li>Lack of adequate infrastructure for public space and commercial recycling.</li> <li>Lack of cooperation by generators to put recyclable materials in the correct bin where it can be recovered.</li> </ul>	<p>Currently under discussion and in flux. Strategies utilized by other jurisdictions include: bans on materials from disposal, bans on sale of hard to recycle materials inside jurisdiction boundaries (Styrofoam or plastic bag bans).</p> <p>Strategies already in use:</p> <ul style="list-style-type: none"> <li>Variable Rates (PAYT).</li> <li>All inclusive pricing-residents pay one price based on size of garbage can. Recycling and Organics recycling services are included in the one fee.</li> <li>Every other week garbage collection being implemented city-wide in 2012.</li> <li>Materials being recovered after scale at City transfer station. Currently carpet and mattresses only.</li> </ul>