GPI Activity Update

Lynn Bragg, President, GPI
West Coast Protective League Meeting
March 17, 2018
2017 Clear Choice Award Winners
Flavored Alcoholic Beverages

SpikedSeltzer, Boathouse Beverage LLC
Ardagh, Wilson, NC
Food

Ball® Food Sharing Jars
by Newell Brands
Ardagh, Winchester, IN
Newcomer to Glass Packaging
Oui by Yoplait®
O-I, Auburn, NY
Spirits
Wild Turkey
Rare Breed
O-I, Montreal, Quebec
Beer and Cider

Coolcumber
Wicked Weed Brewing
Ardagh, Wilson, NC
Wine

Robert Mondavi
Private Selection
Ardagh, Madera, CA
Glass Container Packaging Trends
Share of 2017 U.S. Glass Container Shipment by Category

- Beer (56%)
- Food (18%)
- Beverages (9%)
- Spirits (5%)
- Ready to Drink (4%)
- Wine (8%)
- Other (0.2%)

Source: Glass Packaging Institute
Domestic Beer Packaging Mix (Aluminum Increases its Share)

2008

- Glass: 55.7%
- Cans: 34.7%
- Draft: 9.6%

2017

- Glass: 62.1%
- Cans: 26.8%
- Draft: 11.1%

Sources:
- Alcohol and Tobacco Tax and Trade Bureau (TTB)
- US Commerce Department
- Can Manufacturers Institute (CMI)
- Glass Packaging Institute (GPI)
- National Beer Wholesalers Association (NBWA)
- Beer Institute
Glass Shipment Report (Spirits and RTD increase)

NAB = Non-Alcoholic Beverages
RTD = Ready to Drink Alcoholic Beverages
Legislative & Regulatory Initiatives
California

- **Heavy Metals:** Harmonization with Europe/Legislative Fix

- **San Joaquin Valley:** Work with regulators to reverse proposed reduction in NOx limits for furnaces (*announced last week*)

- **Bottle Bill:** Defend program integrity, guard against its elimination, reduce glass collected through single stream
Oregon

- **Waste Haulers:** Glass placed on DO NOT recycle commingled list

- **Cap and Trade:** Dead for 2018, but look for action in 2019

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**Oregon Refuse & Recycling Association**

**Suggested Items that are OK for Commingled Recycling Programs**

1. **Paper**
   - Newspaper, including advertisements and paper inserts
   - Corrugated cardboard
   - Magazines and catalogs
   - Junk/ Direct mail
   - Boxes — cereal, cracker, cookie and shoe boxes
   - Office paper — copier and printer paper, file folders, note paper, computer paper, brochures

2. **Metal**
   - Steel (tin) cans
   - Aluminum cans

3. **Plastic** — Bottles and Jugs only — clean with lids removed
   - Beverage bottles — soda, water, juice — 12 ounces or larger only
   - Other bottles — soap, household cleaning solutions
   - Jugs — milk, juice, detergent

*This is the most comprehensive list of materials to include. For those programs that choose to offer a more limited group, that would be acceptable as well.*

**Suggested Items to Remove from Commingled Recycling Programs**

1. **Paper**
   - Aseptic packaging and all milk, juice, soup or similar boxes or cartons
   - Shredded paper

2. **Metal**
   - No scrap metal

3. **Plastic**
   - Plastic tubes — salsa, margarine, cottage cheese, hummus, etc.
   - Yogurt cups
   - Planting or nursery pots
   - 5-gallon buckets

4. **Glass**

**Depot Alternatives**

For those jurisdictions that would like to offer additional recovery options, it might be possible to establish drop off options at depots.

Revised 2/12/18
Washington

- **Waste Haulers**: Glass placed on DO NOT recycle commingled list

- **Carbon Tax**: Bill dead for 2018, look for placement on ballot initiative this fall *(glass manufacturers currently exempt)*

- **Carbon Cap in Place**: Glass manufacturing to come under regulation about 2025.

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**WASHINGT0N REFUSE & RECYCLING ASSOCIATION**

WRRA Member MRFs Suggested List of Materials to Include in Commingled Recycling Programs.

1. **Paper**
   - a. Newspaper including ads and inserts
   - b. Corrugated Cardboard Boxes
   - c. Direct Mail
   - d. Cereal, Cracker & Shoe Boxes (Chipboard)
   - e. Office paper - copier and printer paper, file folders, note paper, computer paper, brochures
   - f. Magazines & Catalogs

2. **Metal**
   - a. Steel (Tin) Cans
   - b. Aluminum Cans

3. **Plastic**
   - a. Plastic Bottles - #1 PET & #2 HDPE - Soda bottles, water bottles, milk jugs, Orange Juice bottles & jugs, detergent & cleaning solution bottles

*This is the most comprehensive list of materials to include. For those programs that choose to offer a more limited group, that would acceptable as well. This list emphasizes the processing of materials that have the highest value and excludes those materials that erode the value through the collection of materials that contaminate the higher value materials.

**Suggested List of Items to Exclude from Commingled Recycling Programs**

1. #3-#7 Plastic Items
2. Plastic Bags & Plastic Film of all kinds
3. Flower pots
4. Paper Milk & Paper Juice Cartons
5. Aseptic Packaging
6. Shredded Paper
7. Glass
8. Hazardous & Medical Waste of any Type
9. Diapers
10. Fabric (Textiles) of any type
11. Wire, Rope, Chain, Garden Hoses & Christmas Lights
12. Wood
13. Trash – Put the Garbage in the Garbage Bin

**Depot Alternatives**

For those jurisdictions that would like to offer additional recovery options, it might be possible to establish drop off options at depots for additional items.
Federal

North American LNG Import/Export Terminals

Import Terminals
- U.S.
  - Approved - Under Construction - FERC
    1. Corpus Christi, TX: 24 MTC (Corpus Christi LNG) (CP10-059)
  - Approved - Not Under Construction - FERC
    2. Sakhalin, RUS: 12 MTC (Sakhalin-2 LNG) (CP13-132)
  - Approved - Not Under Construction - Sendai
    3. Shetland Island, UK: 1 MTC (in progress)
  - Shetland Island, UK: 2 MTC (in progress)
  - Shetland Island, UK: 3 MTC (in progress)
  - Shetland Island, UK: 4 MTC (in progress)

Export Terminals
- U.S.
  - Approved - Under Construction - FERC
    1. Sunnyside, ID: 1 BCF (Great Plains LNG) (CP16-027)
  - Approved - Not Under Construction - FERC
    2. Calvert Cliffs, MD: 3 BCF (Calvert Cliffs LNG) (CP19-007)
  - Approved - Not Under Construction - Trade
    3. Port of Ashland, OR
  - Approved - Not Under Construction - Trade
    4. Port of Ashland, OR
  - Approved - Not Under Construction - Trade
    5. Port of Ashland, OR

Canada
- Approved - Not Under Construction
  6. Fort McMurrary, AB: 1 TCF (Deepwater LNG)
  7. Fort McMurrary, AB: 2 TCF (Deepwater LNG)
  8. Fort McMurrary, AB: 3 TCF (Deepwater LNG)

As of August 3, 2016

Limit Future LNG Exports – Control Energy Cost for Glass Manufacturers

Competitive Switching, Fair Rail Rates, Better Service

Soda Ash Royalty Reduction

wyoming trona production

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SOURCE: Wyoming State Geological Society
Moving Forward
Delivery Platforms

HOW DOES GLASS FIT INTO THE EQUATION?
Sustainability Initiatives

- Gold Level Cradle to Cradle Certification
- Food Safety Certification
Sustainability Initiatives

Oregon Refillable Bottle Program
Nimble

ON DEMAND

GALLO GLASS
CALIFORNIA PURE

BOB
Food. Buy Our Bottles.com
Thank You!

Learn more about GPI:
www.GPI.org
www.UpgradeToGlass.com
GlassRecycles.org