1.0 INTRODUCTION

Tetra Tech Canada Inc. (Tetra Tech) was retained by Metro Vancouver to conduct a commercial source separated organics survey. This survey aims to obtain inputs and perspectives from various industry groups (e.g., processors, haulers, and generators) in the waste management supply chain to gauge the feasibility of accepting additional source separated organics from additional waste generators. Currently, the waste diversion rate in Metro Vancouver is 64%. One identified opportunity to further increase waste diversion is to accept source separated organics from the multi-family and commercial and institution sectors at selected Metro Vancouver transfer stations. The results from this survey should assist Metro Vancouver in identifying next steps to implement programs to capture, transport, and process source separated organics from the multi-family and commercial and institution sectors.

2.0 SURVEY METHODOLOGY

Tetra Tech worked with Metro Vancouver staff to prepare a list of potential respondents within the specified three industry groups and a list of survey questions. Respondents were grouped into processors, haulers and generators. Attachment B lists the respondents that Tetra Tech reached out to for input for the survey. The prepared list attached reflects all the respondents that Tetra Tech staff contacted for input for survey and the results and comments of the survey is presented in this report.

Each industry representative was contacted by email and then issued a questionnaire (as shown in Attachment C) electronically. Follow up calls were conducted to ensure the questionnaires were received or if the questionnaire could be redirected to another individual who would be better suited to receive and respond to the questions.

2.1 Conducting the Survey

Electronic questionnaires and telephone surveys were accompanied with an introductory preamble, which was approved by Metro Vancouver, to ensure each respondent understood the purpose of the survey. The preamble is included in Attachment C.

2.2 Survey Questions

If a respondent agreed to complete the survey electronically, they would submit the completed survey to Tetra Tech who would then compile the responses into a spreadsheet. If the respondent agreed to complete the survey through a telephone interview, Tetra Tech staff would record the answers for the respondent and then compile the responses into the spreadsheet.
3.0 SURVEY RESULTS

Results from the surveys for all industry respondents are presented below. Individual responses have been kept confidential and the following results have been summarized to provide an industry perspective.

3.1 Processors

3.1.1 Question 1: What benefits and challenges do you face with the current system for organics collection and processing in the Metro Vancouver region?

The responses for benefits with the current system for organics collection and processing are limited and mixed. Most processors appreciated that the current system has the ability to close the loop and to promote food waste reduction.

Figure 3-1 represents the responses from processors and their view of the challenges of the current system. Contamination is an underlying issue that was mentioned in the responses.

![Figure 3-1: Processor Challenges with the Current System](image)

The majority of processors (45% of responses) found that contamination was their main challenge with comments such as:

- We need new regulations that help lower contamination rates;
- More is required to keep contamination out of the commercial source separated organics stream; and
- High levels of plastics and increasing amounts of biodegradable consumer packaging makes it challenging to process commercial source separated organics.

Processors (27%) also indicated that entering the processing market is challenging and made comments such as:

- Cannot afford the high handling costs for contaminated commercial source separated organics; and
• Sending organic material to be processed outside of Metro Vancouver creates an unfair business environment because they don’t operate under the same regulations (i.e., air permits).

Cost (18%) and other issues (9%) were also flagged as challenges. Processors indicated the following:

• Processing materials with high contamination rates in the source separated organics is challenging;
• The lack of processing options impedes their ability to refuse contaminated loads; and
• Processors need to define the acceptable level of contamination rather than being determined by Metro Vancouver; and
• According to processors, haulers need to be involved in establishing the level of contamination at the point of collection and help reduce contamination at the source.

3.1.2 Question 2: What is your current operating capacity to process source separated organics? How is that operating capacity determined (e.g., permit limit, facility constraints)?

Processors indicated that their processing capacity is determined by their permits. The distribution of processing capacities is illustrated in Figure 3-2.

![Figure 3-2: Permitted Processing Capacity Distribution Amongst Processor Responses](image)

3.1.3 Question 3: Do you have additional capacity to process additional volumes of source separate organics?

Most processors indicated that they have additional capacity to process more source separated organics but are limited by their permit. There were additional comments with respect to the following:

• Volume of additional material is dependent of the quality and quantity of food waste within the loads; and
• Processors would need to apply to increase permit levels and that would be subject to guaranteed minimum volumes.
3.1.3.1 Question 3a) No, are you considering upgrading your operation to process additional volumes?

Processors that do not have additional processing capacity indicated the following:

- Would consider upgrading their facility and permit to process additional material; or
- No current plans or interest to process more commercial source separated organic material; however, would take it into consideration if there was more information or incentives.

3.1.4 Question 4: What are your fees associated with contamination? How do you typically assess incoming material to determine if any contamination surcharges would apply?

Additional fees to deal with contamination vary among facilities and none of the processors were willing to disclose their fees/rates. Contamination is assessed through visual inspections when loads enter the facility. Figure 3-3 shows how processors deal with contamination. It shows that 63% of processors have contamination fees/surcharges that are based on what is in their contract agreement, 25% have a flat rate and 13% have the ability to refuse loads. The follow explains the various methods that processors would employ to impose contamination fees/surcharges:

- Contamination related fees are passed along to haulers;
- Surcharges are applied based on type and level of contamination;
- Fees are based the type of feedstock and its ability to meet permits and regulatory standards for the end product; and
- Processors would assess the material and would apply charges when the disposal of residue is above the approved percentage.

![Figure 3-3: Approached to Dealing with Contamination](image-url)
3.1.5 Question 5: Are there any materials that would be explicitly prohibited rather than surcharged?

Each processor has different terms and levels for contamination. Below are examples of what processors would explicitly prohibit:

- Garbage;
- Materials that are not organic or compostable;
- Plastics (including biodegradable plastics);
- Hazardous waste as stipulated by the health department and/or facility standards; and
- Material that is not allowed under the Organic Matter Recycling Regulation.

3.1.6 Question 6: Would you be interested in submitting a proposal to Metro Vancouver to provide hauling and processing of commercial food scraps?

There was mixed interest in submitting a proposal to Metro Vancouver. Many processors would welcome the opportunity for the increase of business but would like more details regarding the initiative. Some processors expressed their concerns of how the new initiative would affect their business negatively.

3.1.6.1 Question 6a): Are there other contract models that should be considered?

The processors indicated that Metro Vancouver should consider the following:

- Separating out hauling and processing requirements;
- Explore a hauler and processing contract or just processing; and
- Include other locations such as the City of Burnaby’s facility where private hauling from transfer station and processing can be combined in a single contract.

3.1.6.2 Question 6b): Would you consider a unit price contract for hauling and processing?

Many processors would like to know more about how the initiative would work prior to answering this question. A few agreed that a unit price contract would be workable. Some processors asked whether Metro Vancouver would consider minimum guaranteed tonnage.

3.1.6.3 Question 6c): If guaranteed minimum tonnages would be required for this model, what would that amount be?

Processors expressed that the guaranteed minimum tonnage would be dependent on the size of the contract and should be open to negotiation.

3.1.7 Question 7: Do you have any challenges with respect to selling end products generated from organics processing?

Each processor indicated that they had no issues selling end products generated from their organic processing facilities. End products that are being sold from the processors are high grade compost, soil mix, and turf mix. End markets vary from resale to agricultural market, industrial soil and site remediation and landscaping.
3.1.8 Question 8: Do you have any suggestions, comments or concerns that would be important to consider for this potential initiative?

Processors indicated the following:

- Metro Vancouver needs to support haulers, accepting commercial source separated organics will place the market in flux by undercutting processors and demand;
- Suggest introducing a buy-back program for compost to ensure sustainable programs;
- Metro Vancouver should encourage processors to expand by creating new bylaws that will improve economic leverage;
- Supporting industry that allows for compost to be used in other means such as Erosion Control by creating standards and regulations for this initiative;
- Processing should remain in Metro Vancouver Region to reduce the carbon footprint of transporting the organic material;
- Maintain a fair and balanced business environment among the processors; and
- Encourage the beneficial reuse of organic materials both within and beyond Metro Vancouver to do the part in green procurement/circular economy program.

3.2 Haulers

3.2.1 Question 1: What benefits and challenges do you face with the current system for organics collection and processing in the region?

Challenges

- Monopoly on organic processing has resulted in price gouging
- Difficult for smaller companies to compete
- Less ethical places where value of the material can be used rather than the incinerator
- Licensing and regulatory barriers
- Limited drop off locations and cost of disposal
- Lack of consistency across the current system in Metro Vancouver
- Not enough guidance/support from Metro Vancouver for construct organic processing facilities

Benefits

- More balance in the industry
- Increase support to smaller and local companies
- Current system allows for offering full range of removal services (i.e., organics) and creating an even playing field for services
3.2.2 Question 2: If Metro Vancouver were to accept source separated organics from commercial haulers at some Metro Vancouver transfer stations, would the ability to deliver to these facilities be beneficial to your firm?

There was agreement amongst most haulers that if Metro Vancouver were to accept source separated organics at its transfer stations, it would likely be beneficial to haulers. Many expressed their support with the following comments:

- Huge benefit to small local companies;
- Increase balance between all sectors within the industry;
- Supports the importance of separation of organic material; and
- Increased efficiency to have an organics drop-off in locations that currently lack a processor, such as the North Shore.

3.2.3 Question 3: How do you evaluate load quality and manage contaminated loads with your customers?

Most of haulers conduct visual audits at the point of collection and some conduct visual audits once the material is dropped off at the processing facility. Figure 3-4 shows that 75% of haulers conduct visual assessments for contamination at the point of collection (origin of material), while 25% of haulers will visually assess the level of contamination once dropped off at the processing facility.

Some haulers indicated they provided follow up education/training to customers to increase diversion rates and reduce contamination rates.

![Figure 3-4: Location Where Haulers Evaluate Contamination](image-url)
3.2.4 Question 4: Do you have any suggestions, comments or concerns that would be important to consider for this potential initiative?

The haulers indicated the following:

- Haulers would support Metro Vancouver’s initiative to accept source separated organics at its transfer stations;
- Suggest having a third-party contract to oversee operations to avoid biases and price gouging;
- Would like to see a truck wash area to rinse and wash trucks before leaving the transfer station after unloading material;
- Would like to see the size of existing transfer stations expanded to meet the growing population demands;
- Metro Vancouver should focus on municipal solid waste only and stay out of the already established organics sectors; and
- Metro Vancouver should potentially look at updating their solid waste management services.

3.3 Generators

3.3.1 Question 1: What benefits and challenges do you face with the current system for organics collection in the region?

Generators indicated they do not have challenges with the current system in the region. Collection is typically contracted out to a third-party company and collection that is convenient and reliable is their priority.

Some generators have the ability through their contacts to dictate where their collected materials are taken to such as to farms, where they can receive rebates for their organic material. Services that are important to generators are regular hauling and cleaning of their bins.

Two items that were mentioned in the surveys were:

- It was more difficult to separate dry/solid organics versus liquid organic material; and
- One generator indicated that with the high costs of hauling, they would support a Metro Vancouver provided collection service.

3.3.2 Question 2: What is the source of organics that you produce? (e.g., restaurant, grocery store)

The origin of the organics from generators vary, and the following lists the sources where organic material came from:

- By-products from manufacturing product;
- Material and product that did not pass Quality Assurance/Quality Control;
- Farms; and
- Waste/residue from product manufacturing (mango pits, bone cuttings).
3.3.3 Question 3: On average how much organics does your company produce in a month (cubic yards, tonnes, etc.)?

The amount of organics generated from those surveyed varied by industry type and ranged from 50 kilograms per month to 190 tonnes per month.

3.3.4 Question 4: Would you see a benefit to Metro Vancouver receiving source separated organics for recycling at some regional transfer stations (transfer stations include: North Shore, Surrey and Coquitlam)?

Generators indicated that they need to know more, such as where the organic material were going and how much it would cost. There was a strong preference that it be used for a resource that can add value rather than being disposed or incinerated.

3.3.5 Question 5: Do you have any suggestions, comments or concerns that would be important to consider for this potential initiative?

Feedback includes the following:

- Collection and hauling of the organic material from their facility to the transfer station is an important consideration;
- More education is required for what would constitute as contamination and acceptable loads; and
- Would like more information on the initiative and how it could benefit their company or organization.

3.4 All Industry Responses

Each processor, hauler and generator were asked the following question.

3.4.1 Question 1: What changes should be undertaken in the organics management marketplace to encourage private sector investment in the hauling and processing of commercial food waste to help the Region to achieve their diversion goals?

The responses were divided into the following categories.

**Transportation**

- Transportation cost was a major concern for all stakeholders. If a fuel tax or an incentive could be introduced that would lower cost, that would increase viability for all; and
- Provide pick up for commercial and food manufacturing facilities.

**Beneficial Use**

- Increase the utilization of compost to support economic and environmental benefits;
- Worth exploring alternative outlets for organics; and
- Having more facilities would benefit processors and haulers to bring the contamination rates down.
Financial Considerations

- Transparent pricing – organics collection should have a separate price from garbage as the combined pricing devalues the services and individuals should understand the price of each service;
- Needs more incentives and support for businesses within the industry;
- Increase tipping fees for solid waste disposal as it is currently cheaper for food waste disposal in the US;
- For materials to stay within Metro Vancouver, increase solid waste tipping fees to push toward incentives and innovation of handling the organic material; and
- Tax breaks or financial incentives from governing bodies.

Plastics

- Some generators expressed support for using compostable plastics; and
- Allow for certified compostable plastics/products to be accepted in the stream.

Business and Innovation

- Businesses require more support to learn best practices for organics removal;
- Partnering with manufacturers, food supply-chains, and any commercial body that creates food waste would be beneficial to diversion;
- Current system does not support businesses and innovation;
- Worth exploring alternative outlets for organics;
- Metro Vancouver should support expansion and permitted volume increases for new facilities that have invested in organics processing; and
- Encourage operators to process materials for beneficial reuse outside of the Region to promote and support the principles of a circular economy.

Education and Training

- Public education and clarification is lacking and needs to be expanded; and
- Contamination should be dealt with at the point of generation where the materials are collected.

Regulations

- Introduce new regulations to reduce the risk to potential investors to avoid what happened to Harvest Power; and
- Stronger regulation for landfilling of organics. Currently, the management is not good and not sustainable with food material. Organic waste needs better management and regulation.
4.0 DISCUSSION

Overall, all parties need more clarity on the process, regulations and standards that the initiative will follow. They would like to see any type of incentive that would benefit their companies. New protocols need to include items such as certified compostable plastics and products as this would be beneficial to businesses and individuals looking to increase diversion rates.

4.1 Processors

Processors do not support the idea of Metro Vancouver accepting commercial source separated organics at select transfer stations. They believe the new initiative will negatively affect their businesses. Processors suggest that Metro Vancouver needs to implement new rules, regulations and standards for source separated organics collection, contamination levels, end use of processed material and permitting of facilities.

If processors were to enter into a contract to receive source separated organics from Metro Vancouver’s transfer stations, the processors will need to know the following:

- How much organic material will they consistently receive for processing (i.e., number of loads, weight of loads, frequency of loads, etc.); and
- Percentage and/or level of acceptable contamination.

4.2 Haulers

Haulers support Metro Vancouver’s new initiative. They believe that it will move the power of setting standards back to Metro Vancouver and not to processors. They would like to see more support for local and small business to enter into the market.

Important considerations from the haulers’ perspective include the following:

- New initiative would be beneficial to smaller companies; and
- Rules, regulations and standards need to be controlled to ensure a fair market price and to avoid price gouging.

4.3 Generators

Generators do not see a direct benefit to their business if Metro Vancouver were to start accepting commercial source separated organics. They do emphasize that they would need a better monetary incentive for them to use the new initiative compared to their current contractual disposal options. They also expressed that they would like to know where the material will be processed and the end market of the processed material. They would also prefer that their material be processed for a beneficial use rather than being landfilled or incinerated.
5.0 CLOSURE

We trust this technical memo meets your present requirements. If you have any questions or comments, please contact the undersigned.

Respectfully submitted,
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Enclosure: 
Attachment A: Limitations on the Use of this Document
Attachment B: List of the Respondents
Attachment C: Questionnaire
ATTACHMENT A

LIMITATIONS ON THE USE OF THIS DOCUMENT
LIMITATIONS ON USE OF THIS DOCUMENT

GEOENVIRONMENTAL

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In certain instances, the discovery of hazardous substances or conditions and materials may require that regulatory agencies and other persons be informed and the client agrees that notification to such bodies or persons as required may be done by TETRA TECH in its reasonably exercised discretion.
ATTACHMENT B

LIST OF THE RESPONDENTS
# 1.0 INDUSTRY RESPONDENTS

## Haulers
- Emterra Environmental
- Green For Life
- Green Coast Rubbish
- Maple Leaf Disposal
- North Shore Disposal
- Recycling Alternative
- Sierra Waste Services
- Super-Save Disposal
- Urban Impact
- Waste Connections of Canada
- Waste Control Services
- Waste Management

## Processors
- Anaconda, Vancouver, BC
- Green For Life - Enviro-Smart Organics, Delta, BC
- Revolution Resource Recovery, Surrey, BC
- Surrey Biofuel Facility (operated by Renewi Canada), Surrey, BC
- West Coast Reduction Ltd., Vancouver, BC
- Vancouver Landfill, Delta, BC
- Enterra Feed Corp, Chilliwack, BC
- Net Zero Waste, Abbotsford, BC
- The Answer Garden Products, Abbotsford, BC
- Sea to Sky Soils, Pemberton, BC
- Pacific Substrate, Cache Creek, BC
- Fisher Road Recycling, Cobble Hill, BC
- Nanaimo Organic Waste, Nanaimo, BC
- Veolia North America, Kent, Washington, United States

## Generators
- Greenhouse association
- Lantac
- Nature’s Path
- Superior Poultry
- Sysco
- T&T Supermarket
- AIMGrow
- AlgaFresh
- BC Housing
- Biota Fermentation
- BiTE Snacks
- Blue Heron Cheese Company
- Canada Food Packers
- Canadian Wise Foods
- Daiya Foods
- Everland
- Fraser Health
- Gordon Food Services
- Red Dog Blue Cat
- Rich Fruits
- Sun Rich
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<td>BC Restaurants and Food Association</td>
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<tr>
<td>Discovery Organics</td>
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ATTACHMENT C

QUESTIONNAIRE
1.0 METRO VANCOUVER COMMERCIAL ORGANICS MARKET SOUNDING
PREAMBLE AND QUESTIONS

1.1 PREAMBLE

Hello, I’m______ with Tetra Tech Canada. We are reaching out on behalf of Metro Vancouver to ask a series of questions regarding commercial source separated organics. Is this a good time to speak? Metro Vancouver’s regional diversion goal is 80% and we are currently at 64%. Compostable organics make up approximately 26% of the waste stream and present an important opportunity for increased diversion. Without additional actions, the region won’t achieve its waste diversion goals. Metro Vancouver is currently exploring opportunities to increase organics diversion.

The purpose of today’s call is to seek input on whether Metro Vancouver should accept food scraps from multi-family and commercial/institutional generators at some Metro Vancouver transfer stations. Metro Vancouver expects that if food scraps are received at Metro Vancouver transfer stations tipping fees would set by bylaw, with surcharges for contamination. Fees would be set on a cost-recovery basis, with processing contracted to a third party. Total annual quantities are uncertain, but Metro Vancouver anticipates that between 5,000 and 10,000 tonnes per year could be received at each transfer station used to receive organics.

Your individual responses will be kept confidential and the answers will be generalized to provide an industry perspective. We would list you as one of the stakeholders contacted as a part of this survey, but not tie specific answers to you or your company. Are you willing to participate in this survey?

2.0 INTERVIEW QUESTIONS

2.1 Processor Questions

1. What benefits and challenges do you face with the current system for organics collection and processing in the Metro Vancouver region?

2. What is your current operating capacity to process source separated organics (SSO)? How is that operating capacity determined (e.g., permit limit, facility constraints)

3. Do you have additional capacity to process additional volumes of SSO?
   a) No, are you considering upgrading your operation to process additional volumes?

4. What are your fee scales depending on levels of contamination? How do you typically assess incoming material to determine if any contamination surcharges would apply?

5. Are there any materials that would be explicitly prohibited rather than surcharged?

6. Would you be interested in submitting a proposal to Metro Vancouver to provide hauling and processing of commercial food scraps?
   a) Are there other contract models that should be considered?
b) Would you consider a unit price contract for hauling and processing?

c) If guaranteed minimum tonnages would be required for this model, what would that amount be?

7. Do you have any challenges with respect to selling end products generated from organics processing?

8. Do you have any suggestions, comments or concerns that would be important to consider for this potential initiative?

### 2.2 Hauler Questions

1. What benefits and challenges do you face with the current system for organics collection and processing in the region?

2. If Metro Vancouver were to accept source separated organics from commercial haulers at some Metro Vancouver transfer stations, would the ability to deliver to these facilities be beneficial to your firm?

3. How do you evaluate load quality and manage contaminated loads with your customers?

4. Do you have any suggestions, comments or concerns that would be important to consider for this potential initiative?

### 2.3 Generator Questions

1. What benefits and challenges do you face with the current system for organics collection in the region?

2. What is the source of organics that you produce? (e.g., restaurant, grocery store)

3. On average how much organics does your company produce in a month (cubic yards, tonnes, etc.)?

4. Would you see a benefit to Metro Vancouver receiving source separated organics for recycling at some regional transfer stations (transfer stations include: North Shore, Surrey and Coquitlam)?

5. Do you have any suggestions, comments or concerns that would be important to consider for this potential initiative?

6. What changes should be undertaken in the organics management marketplace to encourage private sector investment in the hauling and processing of commercial food waste to help the Region to achieve their diversion goals?