

2025 Annual Producer Meeting

October 16, 2025



Welcome

2025 Annual Producer Meeting

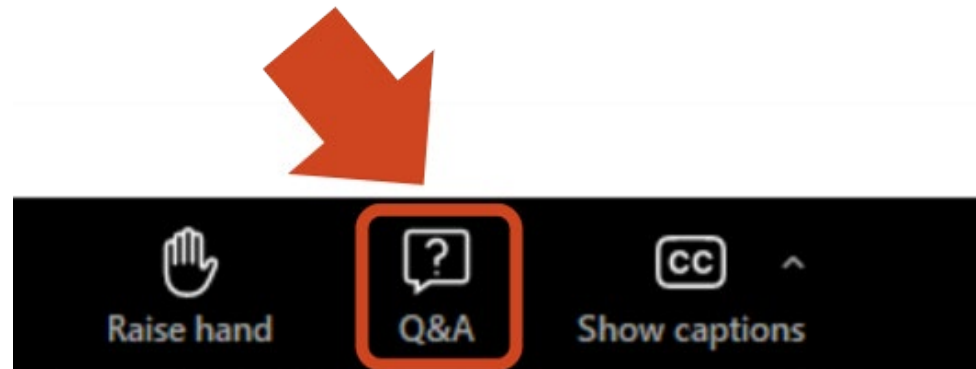


Land Acknowledgement



Q&A

- Please submit questions and feedback via the Zoom Q&A button at the bottom of screen.
- We will respond to a few questions after each presentation section and there will be time for Q&A at the end.
- Today's presentation and webinar recording will be made available on all program websites.



Agenda

- Opening Remarks
- Budget and Fee Setting Process
 - Multi-Year MCD Methodology Review
- Circular Materials in Nova Scotia
- Circular Materials in New Brunswick
- Stewardship Ontario
- Multi-Material Stewardship Manitoba
- SK Recycles
- Circular Materials in Alberta
- Recycle BC
- Circular Materials in the Yukon
- Q&A



2025 Report to Producers

Opening Remarks

Allen Langdon
CEO, Circular Materials

Extended Producer Responsibility (EPR) Across Canada

- Nova Scotia preparing to launch EPR system on December 1, 2025; no phases.
- New Brunswick expanded services to multi-family residences and schools.
- Manitoba celebrated its 15th anniversary and took further steps toward full EPR transition.
- SK Recycles continued to implement full EPR across the province while expanding community participation.
- Alberta launched the first phase of EPR program on April 1.
- Recycle BC enhanced its established program with expanded flexible plastics collection.
- Yukon is preparing for the program launch on November 1.



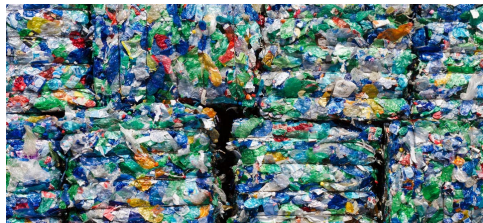
Collaboration & Harmonization to Advance a Circular Economy Across Canada

Circular Materials, MMSM, SK Recycles and Recycle BC are collaborating to harmonize, leverage best practices, drive efficiencies and maximize value for producers.



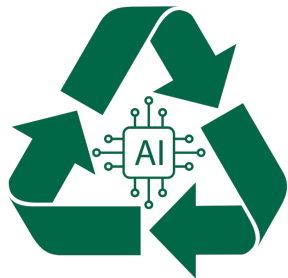
Multi-Year MCD Methodology Review: Enhancing material fee rate setting.

- In 2025, we kicked off a multi-year MCD review. First step to harmonize producer reporting categories nationally. In partnership with EEQ, all PROs achieved 100% alignment on reporting categories and the final harmonized list available [here](#). More to come later in the presentation.



Ongoing collaboration to advance difficult-to-recycle plastics and recycling technologies.

- Circular Materials, Recycle BC and ÉEQ ongoing collaboration efforts to advance flexible plastics packaging (FPP) recycling technologies in Canada.

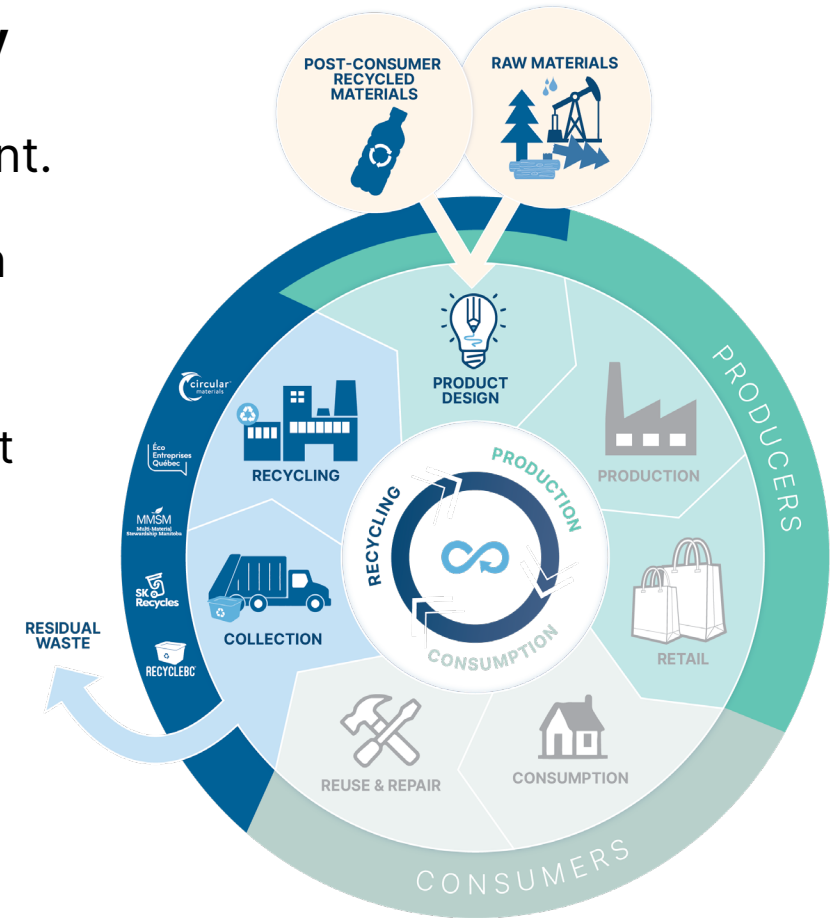


Artificial Intelligence (AI) Technology Collaboration

- Circular Materials, Recycle BC and ÉEQ are collaborating to evaluate AI technology for materials sorting/categorization (e.g., vision systems and pattern recognition) to help automate material audits, provide enhanced operational analytics and ultimately drive system improvements.

Look Ahead: An Exciting Collaboration to Support Producers in Designing for Recyclability

- **Design for recyclability is key enabler of a circular economy** as materials can be more easily recovered and returned to producers for use in new packaging as post-consumer content.
- PROs across Canada are working together to advance design for recyclability and support producers:
 - Guide producers' packaging choices through clear, consistent Canada-wide design for recyclability standards.
 - Improve system efficiency and innovation in circular design.
 - Increase recycling rates by improving sorting efficiency and material quality.
 - Stay tuned for more to come!

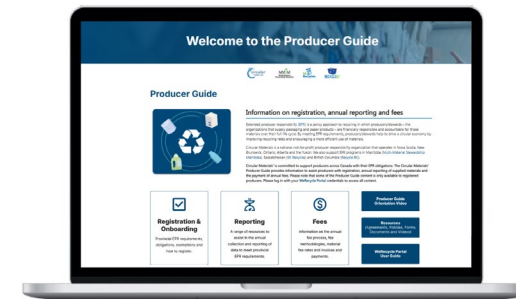


Enhancing the Producer Experience in 2025

We are committed to supporting a seamless experience, including the reporting and fees process.

- **Producer Surveys** seek feedback to enhance the producer experience; next survey takes place in Q4 2025.
- **New Producer Onboarding Webinar Series and Tools** to support new producers/stewards across Canada through onboarding.
- **Producer Guide:** new videos, graphics and resources to support registration, onboarding, reporting and annual fee process.
- **WeRecycle Portal Security Upgrades:** building on efforts in 2025; stay tuned for more to come in 2026!

“..by far the most effective introductory session.”
“..Given the complexity across provinces—PROs, government authorities, exemptions, material lists, and more—this presentation made everything feel much more manageable and easy to follow..”



Overview of Budget and Fee Setting Process

Sarah Auten
VP, Business Intelligence
& Reporting, Circular Materials

Approach to Fee Setting

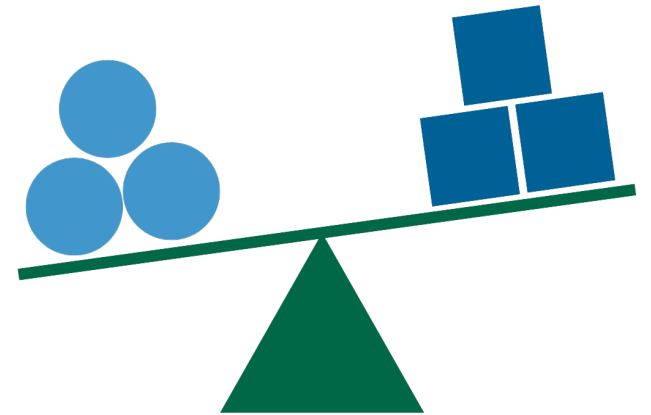
- The annual fee setting process is designed to ensure fairness and transparency.
- Fee methodologies were **developed through extensive consultation with producers**; continue to be refined to ensure fairness and reflect ongoing changes in the recycling industry.
- Fees cover the costs associated with the collection, transportation and processing of designated materials.



For more information on fee methodologies, see the [Producer Guide](#) or view the [Fees 101 Video](#).

Fees between programs are not directly comparable:

- Fee rates for designated materials cover the costs associated with collecting, transporting and processing designated materials in each province/territory.
- **Fees between programs are not directly comparable given differences in:**
 - Regulatory requirements in the province/territory
 - Definitions of designated materials
 - Program scope
 - Funding obligations
 - System costs
 - Material Recovery Targets
 - Program maturity/stage of transition to Full EPR



Summary: How We Calculate Producer Fees



Budget

Total cost to collect, sort and market materials (offset by commodity revenue), plus all program management expenses.



Material Cost Index (MCI)

MCI calculated using **MCD methodology** (more later in presentation); assigns each material a relative value representing its impact on recycling system costs.



Fees

The total fees to be paid by each material category once budget items have been allocated in accordance with the four-step fee methodology.

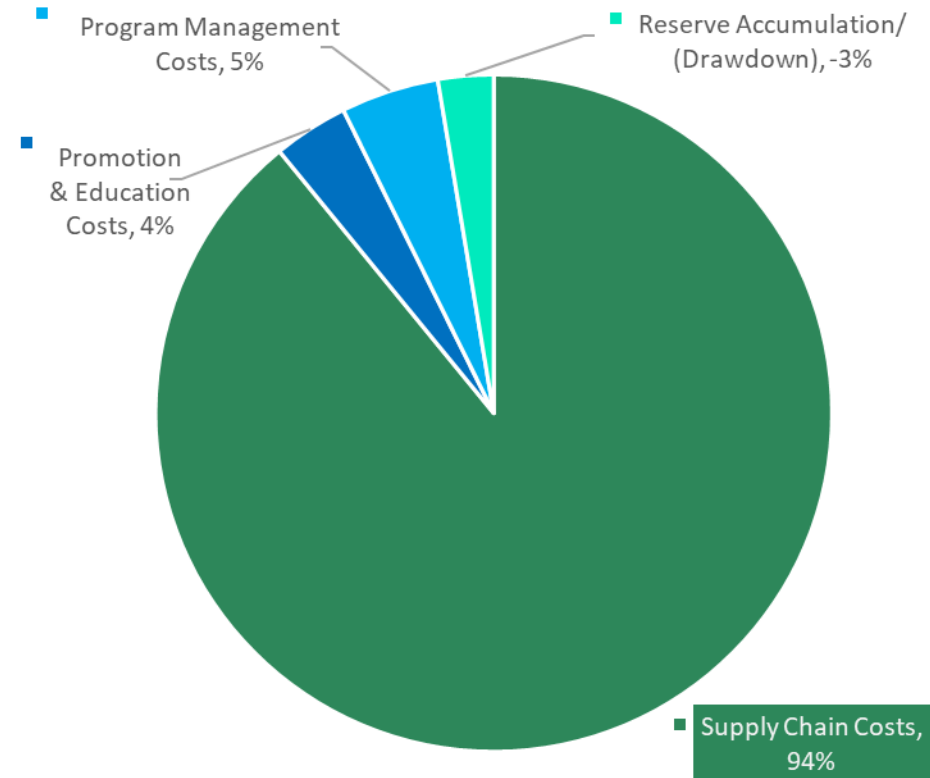


Final Fee Rates

The final fee rate (expressed in cents/kg) is calculated by dividing the total fees for each material category by the quantity of material supplied by producers.

Breakdown of 2026 Budget Costs

- **94% of aggregate* budget costs are supply chain costs** including collection, processing and operational oversight costs.

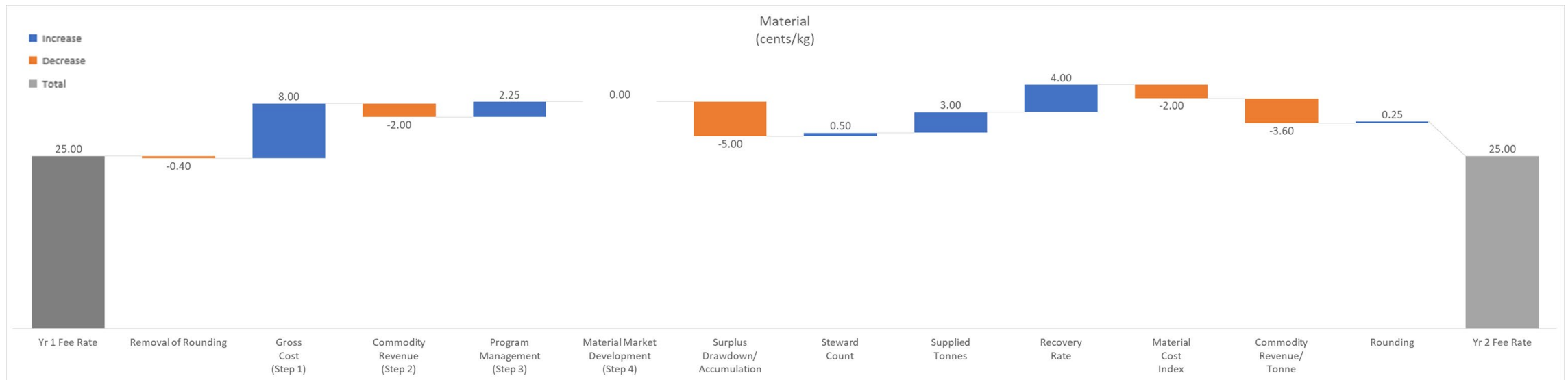


*Note: figures exclude Stewardship Ontario program.

Understanding Fee Rate Cause of Change

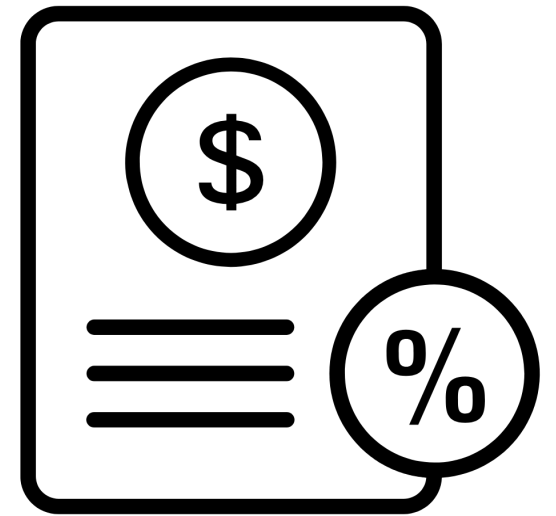
- Cause of Change graphs provide detail on the factors influencing changes to material fee rates year to year.
- See [Report to Producers](#) for detailed descriptions of these factors.
- Graphs available on the [Producer Guide](#) and program websites.

Example of a Fee Setting Material Cause of Change Graph (cents/kgs)



A Note on U.S. Tariff Risks

- The implementation and fluctuation of US tariffs have had a noticeable impact on sectors of the Canadian economy, indirectly impacting the recycling industry.
- To date, PROs for EPR programs across Canada have not been directly impacted by the tariffs, as recyclable materials sent to US end-markets (i.e. plastics and metal) have been exempt.
- A recent announcement by the US government in early October 2025, stated that medium and heavy-duty trucks imported into the US, which include garbage collection trucks, will face a 25% tariff as of November 1, 2025.
- As these tariffs could impact the cost of collection services procured by the PROs, incremental costs will need to be factored into change orders or bid prices as of November 1, 2025.



Q&A

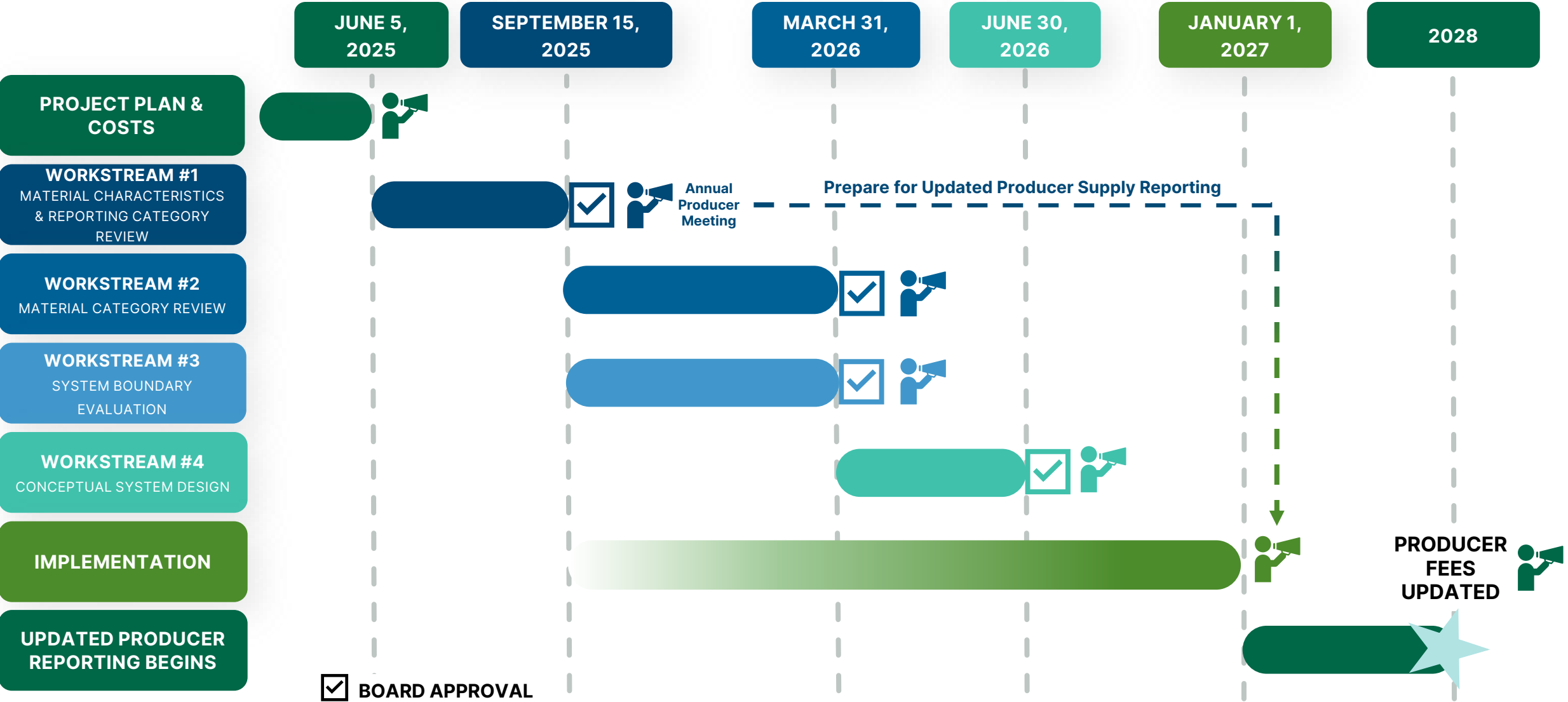


MCD Methodology Review

Alison Cox

Director, Program Strategy &
Innovation

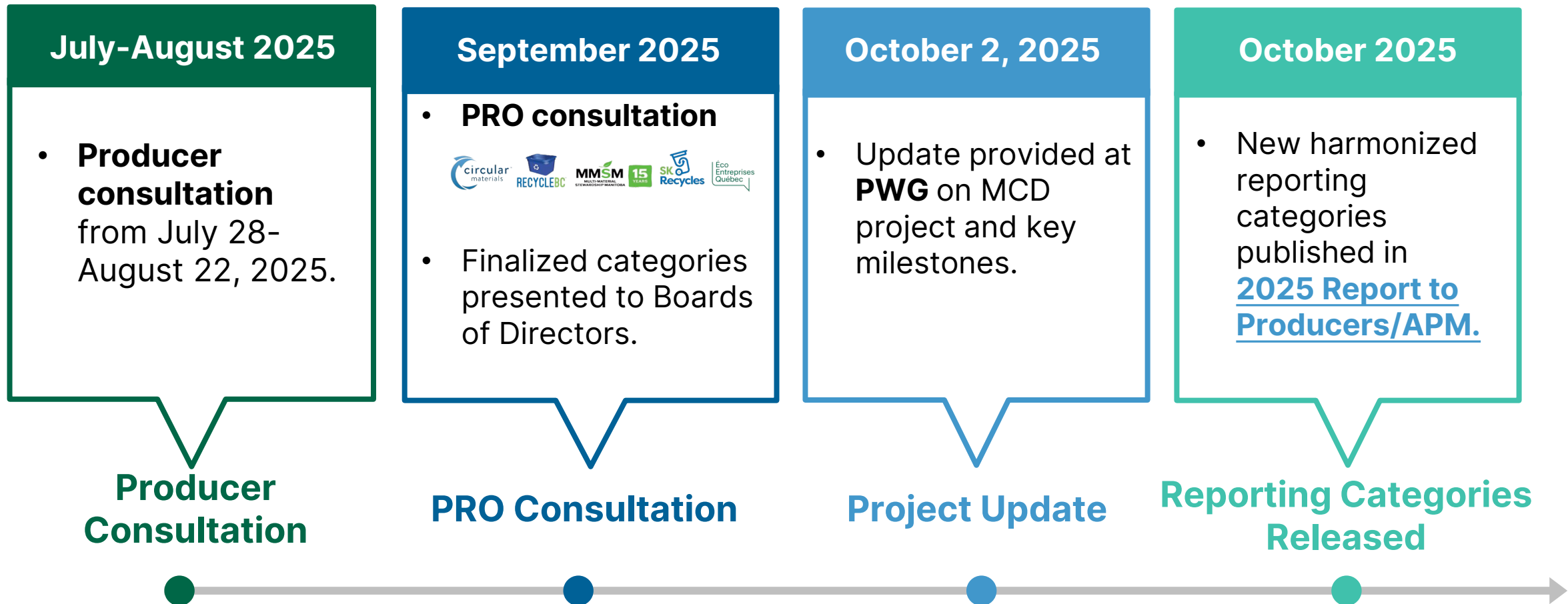
MCD Review: Project Milestones



BOARD APPROVAL
 PRODUCER COMMUNICATION

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Workstream 1: Producer Reporting Categories Review



Harmonization of Reporting Categories Simplifies Producer Compliance Nationally

- Currently, producer reporting categories vary widely by quantity, definition and naming across regions.
- Circular Materials, Éco Entreprises Québec, MMSM, SK Recycles and Recycle BC reached **100% alignment** on harmonized producer reporting categories.
- This means that obligated materials will have the **same reporting categories across Canada**, enabling standardization and simpler reporting for producers.



Harmonized Categories

Through collaboration, we now have **62 Harmonized Reporting Categories across Canada.**



Material Categories	# of Harmonized Categories
Printed Paper & Paper Packaging	18
Rigid Plastic Packaging	26
Flexible Plastic Packaging	9
Metal & Glass	9
TOTAL	62

For a complete list of harmonized reporting categories, please see the Appendix of the [2025 Report to Producers.](#)

New Resources to Support Producers

New Guidance

New resources in the Reporting section of the [Producer Guide](#) to help producers prepare their internal systems ahead of implementation in the 2027 Annual Supply Data Reports.

- [Harmonized Reporting Category Definitions](#): detailed descriptions of the material and packaging that can be assigned to each category with examples and reporting tips.
- [Jurisdictional Reporting Category Map](#): clearly maps the current reporting categories to new harmonized reporting categories for each jurisdiction.
- [FAQs](#): to help address some frequently asked questions (FAQs) related to the transition to new harmonized reporting categories.



Next Steps: Producer Reporting Categories

**November 28,
2025**

MCD 101 Webinar:

[Register here](#)

Producer engagement session to review the Material Cost Differentiation (MCD) Methodology.

**MCD 101
Session**

**January –
December 2026**

Additional Support Tools for Producers:

Throughout 2026 we will develop additional materials to support producers in preparation for 2027 annual reporting.

**Producer Guide
Support Tools**

January 1, 2027

Reporting Categories Implemented:

Producers will begin reporting in alignment with the new harmonized reporting categories.

**Reporting with New
Categories**

Q&A





Circular Materials Overview

Allen Langdon
Chief Executive Officer

About Us

- National not-for-profit producer responsibility organization (PRO) created and governed by producers.
- We support producers in meeting their obligations under extended producer responsibility (EPR) regulations for packaging and paper across Canada.
- Our efforts are also focused on advancing the circular economy by building efficient and effective recycling systems that:
 - Advance innovation.
 - Increase performance.
 - Deliver improved environmental outcomes.



Circular Materials Across Canada



Nova Scotia

Program implementation coming soon (Dec. 1, 2025).



New Brunswick

Phase 2 of program expansion to schools and multi-family dwellings coming soon (Nov. 1, 2025).



Ontario

Transition completes Dec. 31, 2025. Full EPR: Jan 1, 2026. Due to the competitive PRO environment, fees are shared directly with Circular Materials in Ontario producers.



Alberta

Launched on April 1, 2025. Phase 2 implementation completed October 2025, multi-family dwelling registry open for October 2026.



The Yukon

Program implementation coming soon (Nov. 1, 2025).



2025 Collaborations to Advance Recycling Nationally



Circular Materials

- **Joined Circular Plastics Taskforce (CPT):** [CPT](#) is a one-of-a-kind initiative dedicated to finding concrete solutions for improving post-consumer plastics management.
- **Strategic Collaborations with [Call2Recycle](#) and Health Products Stewardship Association (HPSA) to Educate Residents, Reduce Contamination and Improve Recovery Rates:** enhance public awareness on proper recycling of materials specific to each organization's mandate (i.e., batteries and health products).
- **Co-hosted panel discussion session at the Canadian Circular Economy Summit:** In partnership with [Éco Entreprises Québec](#), the discussion with producers and industry partners highlighted importance of collaboration and harmonization to enable an efficient and effective circular economy across Canada.
- **Coming Soon: Circular Materials' Podcast "The Circular Exchange" - Thought Leadership on Advancing a Circular Economy:** First episodes focus on collaborations with [Call2Recycle](#), [HPSA](#) and new recycling education partnerships with [The Gaia Project](#), [EcoSchools Canada](#) and [Earth Rangers](#).

Harmonization: Consistent Materials List

- To support standardization and efficiencies, we are creating a **national approach to collected materials**.
- This will make the recycling system more effective through **consistent public education**, resulting in **less confusion**, **reduced contamination** and **improved recycling rates**.
- A unified approach to collected materials will also achieve economies of scale and program efficiencies.



Circular Materials in Nova Scotia

Andrew Philopoulos
Managing Director, Atlantic Canada



EPR Transition in NS Timeline



2023

EPR legislation enacted

All 49 NS municipalities registered by December 31, 2023.



2024

Circular Materials completed engagement and development of Readiness Report

Accepted by Divert NS on November 14, 2024.



2025

Implementing service delivery

1. Curbside collection 2. Depot collection of select materials 3. Multi-fam/schools/campgrounds 4. Post-collection.



Dec. 1, 2025

Launch

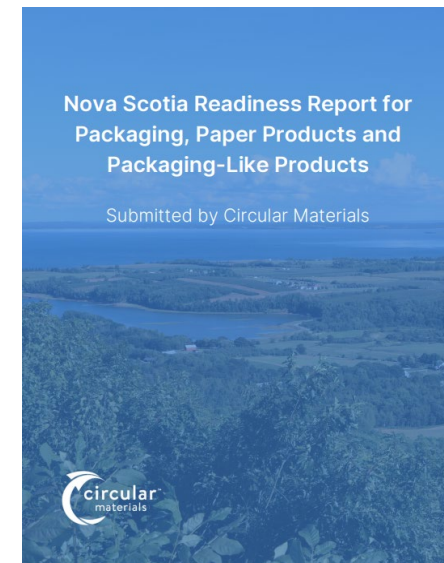
No phases!

2025 Update

- Focus in 2025 was preparing operationally for the December 1 launch and rollout of a comprehensive EPR system in Nova Scotia.
- In March, the [Nova Scotia Readiness Report](#) was released, and Circular Materials launched an online registry for multi-family dwellings, schools and campgrounds.
- In July, Circular Materials released the Nova Scotia [materials list](#), developed based on the [Divert NS](#) (administrator) [Designated Material Guide](#).
- Engagement with Divert NS, municipalities, supply chain partners and Mi'kmaq First Nations throughout the year.
- Looking ahead, we will be hosting a launch event for stakeholders on November 5, 2025.



In June, Circular Materials participated at the [2025 SWANA Spring Technical Summit](#) in Dartmouth, NS to engage industry stakeholders on Atlantic collaboration.



2026 Fee Budget

- The 2026 fee budget captures **13 months** of operations and service to single-family dwellings and the transition of facilities (i.e., multi-family dwellings, schools, and campgrounds) through the year.
- Total fee budget of \$49.9 million includes \$3.0 million reserve accumulation and \$0.8M start-up costs.

Circular Materials in Nova Scotia Fee Budget (\$ in Millions)	
	2026
Supply Chain Cost	\$41.4
Promotion & Education Cost	\$2.4
Program Management Cost	\$2.3
Program Management as % of the Cost Budget	5.0%
Total Cost Budget	\$46.1
Reserve Accumulation / (Drawdown)	\$3.0
Start-up Costs	\$0.8
Total Fee Budget	\$49.9
Additional Information	
Collected Tonnes (Forecasted)	47,556
Supply Tonnes (Reported by Producers)	50,511
Average fee rate (cents per kg) (Total fee budget/supply tonnes)	99 c/kg

2026 Fee Schedule

- First year of fee rates for Nova Scotia.
- Click [here](#) to learn more about fee methodology.
- Please note, the Fee Schedule can be viewed on the [Producer Guide](#).

CIRCULAR MATERIALS NOVA SCOTIA FEE SCHEDULE (CENTS/KG)		
CATEGORY	MATERIAL	2026 FEE RATES (cents/ kg)
PAPER	Newspapers	82
	Newsprint (inserts and circulars)	82
	Magazines and Catalogues	82
	Directories	82
	Other Printed Materials	82
	Purchased Posters, Calendars, Greeting Cards and Envelopes	82
	Paper for General Use	82
	Kraft Paper Carry-Out Bags	74
	Kraft Paper - Non-Laminated	74
	Corrugated Cardboard	74
	Boxboard and Other Paper Packaging	74
	Gable Top Containers	74
	Paper Laminates	74
	Aseptic Containers	74
RIGID PLASTIC	PET Containers, Jars and Jugs < 5 Litres	143
	PET Containers, Jars and Jugs >= 5 Litres	143
	PET Thermoform Containers < 5 Litres	143
	HDPE Containers, Jars and Jugs < 5 Litres	84
	HDPE Containers, Jars and Jugs >= 5 Litres	84
	Expanded Polystyrene	462
	Non-Expanded Polystyrene	186
	Other Plastic Packaging (not listed Above) < 5 Litres	117
	Other Plastic Packaging (not listed Above) >= 5 Litres	117
	LDPE/HDPE Film	212
FLEXIBLE PLASTIC	LDPE/HDPE Film Carry-Out Bags	212
	Plastic Laminates	212
METAL	Other Steel Containers and Packaging	91
	Steel Aerosol Containers	91
	Aluminum Food Containers	104
	Aluminum Aerosol Containers	104
	Other Aluminum Packaging	104
GLASS	Clear Glass	51
	Coloured Glass	51

Three-Year Cost Budget Forecast

Decrease in 2027 budget (compared to 2026) and increase in 2028 (from 2027) related to:

- 12 months of operational costs in 2027 (compared to the 2026 budget which reflected **13 months** of operations including December 2025).
- Savings due to start-up of a new state-of-the art pre-conditioning facility located in Nova Scotia beginning in 2027.
- Collection costs are assumed to increase in 2027 mainly due to the expansion of collection services to multi-family, campgrounds and schools and increased collected tonnes.

Circular Materials in Nova Scotia Cost Budget Forecast (\$ in Millions)					
	2026 Budget	2027 Draft Forecast Budget	2028 Draft Forecast Budget	Variance % 2027 vs. 2026	Variance % 2028 vs. 2027
	(a)	(b)	(c)	(d)=(b-a)/a	(e)=(c-b)/b
Supply Chain Costs	\$41.4	\$39.6	\$40.7	-4.4%	2.9%
Promotion & Education	\$2.37	\$2.41	\$2.5	1.7%	4.0%
Program Management	\$2.3	\$2.4	\$2.6	5.0%	5.0%
Total Costs	\$46.1	\$44.4	\$45.8	-3.6%	3.1%
Additional Information					
Collected Tonnes (Forecasted)	47,556	48,488	48,488	2.0%	0.0%
Households/Stops (contracted)	457,661	516,475	521,639	12.9%	1.0%
Cost per tonne collected	\$970	\$917	\$945	-5.5%	3.1%
Cost per household/stop	\$101	\$86	\$88	-14.6%	2.1%

Q&A





Circular Materials in New Brunswick

Andrew Philopoulos
Managing Director, Atlantic Canada

Current System in New Brunswick

Common collection system

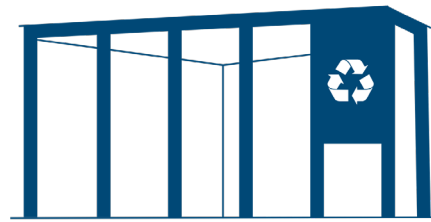


89 entities
14 First Nations

45 depots for
select materials

All communities
receive curbside
service

Post-collection system



5 receiving
facilities

5 pre-conditioning
facilities

Producers



458 producer
registrants

2025: Expanding EPR Program

- In May 2025, we celebrated the expansion of New Brunswick's EPR program for packaging and paper in Oromocto.
- In June 2025, submitted the new Stewardship Plan (2026-2030) to Recycle NB, including proposed targets.
- Looking ahead: 2026 continuing to expand the NB program to include multi-family, schools etc.



On May 1, 2025, we celebrated the expansion of New Brunswick's EPR program.



In July 2025, our team attended the Pabineau First Nation Pow-Wow.

Program Performance

- In July 2025, Circular Materials in New Brunswick published its inaugural [2024 Annual Report](#) outlining the program's performance. See some additional performance metrics in the table.



New Brunswick Performance	
	2024
Recycling Performance	
Collected Tonnes ¹	10,233
Supplied Tonnes (Reported by Producers)	41,475
Recycled Tonnes ²	7,383
Stored Tonnes ³	1,487
% of Tonnes Managed by Recycling ⁴	87%
Population Served by Program ⁵	630,000
Recycled KG per Capita ⁶	14.1
Accessibility Performance	
# Households Served	300,000
Promotion & Education Cost per Capita	\$2.50
Cost Performance	
Recycled + Stored Tonnes	8,870
Net Cost	\$15,944,928
Net Cost per Tonne	\$1,798
Net Cost per Capita	\$25
Collected Tonnes	10,233
Net Cost per tonne collected/managed	\$1,558

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2026 Fee Budget

- 2026 fee budget represents a 9.9% decrease from 2025. Decrease related to availability of more accurate cost data.
- Budget captures the first full year of services for single-family dwellings and the continued expansion of services to multi-family dwellings and schools.
- Includes \$0.6 million reserve drawdown to offset 2026 fee increases for producers while maintaining reserve target.
- While the 2026 fee budget decreased by 9.9%, the average fee rate is consistent with 2025 (i.e., 1% lower) due to lower supply tonnes reported by producers (i.e., 8.6% decline from 2025).

Circular Materials in New Brunswick Fee Budget (\$ in Millions)			
	2026	2025	Variance %
Supply Chain Cost	\$30.6	\$33.2	-8.0%
Promotion & Education Cost	\$2.5	\$2.2	17.7%
Program Management Cost	\$2.2	\$2.0	7.3%
Regulatory Cost	\$0.6	\$0.6	0.0%
Program Management as % of the Cost Budget	6.1%	5.4%	0.7%
Total Cost Budget	\$35.9	\$38.0	-5.6%
Reserve Accumulation / (Drawdown)	-\$0.6	\$1.1	-157.7%
Total Fee Budget	\$35.2	\$39.1	-9.9%
Additional Information			
Collected Tonnes (Forecasted)	31,471	38,591	-18.5%
Supply Tonnes (Reported by Producers)	40,279	44,083	-8.6%
Average fee rate (cents per kg) (Total fee budget/supply tonnes)	88 c/kg	89 c/kg	-1.1%

2026 Fee Schedule



*HDPE Containers, Jars
and Jugs*



Clear and Coloured Glass

The Fee Schedule and the Cause of Change graphs for each material can be viewed on the [Producer Guide](#).

CIRCULAR MATERIALS NEW BRUNSWICK FEE SCHEDULE (CENTS/KG)				
CATEGORY	MATERIAL	2026 FEE RATES (cents/ kg)	2025 FEE RATES (cents/ kg)	VARIANCE %
PAPER	Newspapers	74	80	-7.5%
	Newsprint (inserts and circulars)	74	80	-7.5%
	Magazines and Catalogues	74	80	-7.5%
	Directories	74	80	-7.5%
	Other Printed Materials	74	80	-7.5%
	Purchased Posters, Calendars, Greeting Cards and Envelopes	74	80	-7.5%
	Paper for General Use	74	80	-7.5%
	Kraft Paper Carry-Out Bags	65	61	6.6%
	Kraft Paper - Non-Laminated	65	61	6.6%
	Corrugated Cardboard	65	61	6.6%
	Boxboard and Other Paper Packaging	65	61	6.6%
	Gable Top Containers	65	61	6.6%
	Paper Laminates	65	61	6.6%
RIGID PLASTIC	Aseptic Containers	65	61	6.6%
	PET Containers, Jars and Jugs < 5 Litres	128	121	5.8%
	PET Containers, Jars and Jugs >= 5 Litres	128	121	5.8%
	PET Thermoform Containers < 5 Litres	128	121	5.8%
	HDPE Containers, Jars and Jugs < 5 Litres	75	57	31.6%
	HDPE Containers, Jars and Jugs >= 5 Litres	75	57	31.6%
	Expanded Polystyrene	413	356	16.0%
	Non-Expanded Polystyrene	166	176	-5.7%
	Other Plastic Packaging (not listed Above) < 5 Litres	105	101	4.0%
	Other Plastic Packaging (not listed Above) >= 5 Litres	105	101	4.0%
FLEXIBLE PLASTIC	PLA, PHA, PHB	105	101	4.0%
	LDPE/HDPE Film	187	166	12.7%
	LDPE/HDPE Film Carry-Out Bags	187	166	12.7%
	PLA, PHA, PHB - Plastic Film	187	166	12.7%
	PLA, PHA, PHB Carry-Out bags	187	166	12.7%
METAL	Plastic Laminates	187	166	12.7%
	Other Steel Containers and Packaging	82	78	5.1%
	Steel Aerosol Containers	82	78	5.1%
	Aluminum Food Containers	93	90	3.3%
	Aluminum Aerosol Containers	93	90	3.3%
GLASS	Other Aluminum Packaging	93	90	3.3%
	Clear Glass	46	60	-23.3%
	Coloured Glass	46	60	-23.3%

Three-Year Cost Budget Forecast

- Post collections services for Atlantic Canada are to be centralized at a new pre-conditioning facility located in Nova Scotia. This will result in increased transportation costs for materials from New Brunswick starting in 2027.
- Costs reflect the expansion of collection services to multi-family dwellings and schools along with organic growth for curbside collection.

Circular Materials in New Brunswick Cost Budget Forecast (\$ in Millions)							
	2025 Budget	2026 Budget	2027 Draft Forecast Budget	2028 Draft Forecast Budget	Variance % 2026 vs. 2025	Variance % 2027 vs. 2026	Variance % 2028 vs. 2027
	(a)	(b)	(c)	(d)	(e) = (b-a)/a	(f) = (c-b)/b	(g) = (d-c)/c
Supply Chain Costs	\$33.2	\$30.6	\$35.7	\$36.7	-8.0%	16.8%	2.8%
Promotion & Education	\$2.2	\$2.5	\$2.5	\$2.5	17.7%	0.0%	0.0%
Program Management	\$2.0	\$2.2	\$2.2	\$2.2	7.3%	0.0%	0.0%
Regulatory Costs	\$0.6	\$0.6	\$0.6	\$0.6	0.0%	0.0%	0.0%
Total Costs	\$38.0	\$35.9	\$41.0	\$42.0	-5.6%	14.4%	2.4%
Additional Information							
Collected Tonnes (Forecasted)	38,591	31,471	32,750	33,077	-18.5%	4.1%	1.0%
Households/Stops (contracted)	342,385	353,070	370,957	374,666	3.1%	5.1%	1.0%
Cost per tonne collected	\$984	\$1,139	\$1,252	\$1,269	15.8%	9.9%	1.4%
Cost per household/stop	\$111	\$102	\$111	\$112	-8.4%	8.9%	1.4%

Q&A





Stewardship Ontario

2025 APM

LYLE CLARKE
Executive Director

That's a Wrap!



Stewardship Ontario

- After more than 20 years of pioneering work, Stewardship Ontario will wind up operations at the end of 2025.
- Check out our [2024 Annual Report](#) for a look back on highlights from 20+ years of operations!



Returning Funds to Stewards



Stewardship Ontario

- SO has been focused on delivering a smooth transition at the lowest possible cost. As a result, the projected **transition costs are \$5.4 million or 48.2% lower than forecast** in the [Blue Box Transition Plan](#) and total transition costs to stewards are almost \$20 million less than forecasted.
- Cost reductions and prudent management of reserves will enable SO to **issue refunds on 2025 invoices of \$5-\$8 million**. Refunds will be finalized in November and issued to eligible stewards in December 2025.

Blue Box Transition Plan vs. Actual/Budget 2020-2026 (\$000)				
Blue Box Transition Plan		Blue Box Actual Budget	Variance \$	Variance %
Transition Costs	11,196.2	5,798.2	5,398.0	48.2%
Disburse Plastic Markets Restricted Fund	4,964.4	4,964.4	-	0.0%
Fee Reductions/Refunds	12,091.0	31,169.0	-19,078.0	-157.8%
Operating (Surplus) Deficit	-	(13,680.0)	13,680.0	100.0%
Total	28,251.6	28,251.6	0.0	0.0%

Final Actions for Stewards



Stewardship Ontario

- **Reminder:** Stewards must be in "good standing" as of **October 31, 2025**, to be eligible for refunds.
 - Please ensure all required payments to SO are made before the deadline and that your contact information is up to date in the WeRecycle Portal. For more information, [click here](#).
- **Reminder:** Stewards must [download their SO-related historical data](#) from the WeRecycle Portal as the information will no longer be available after December 12, 2025.



Thank you to all our stewards for your partnership and collaboration over the years!

Annual Producer Meeting

Karen Melnychuk
Executive Director



2025 UPDATE

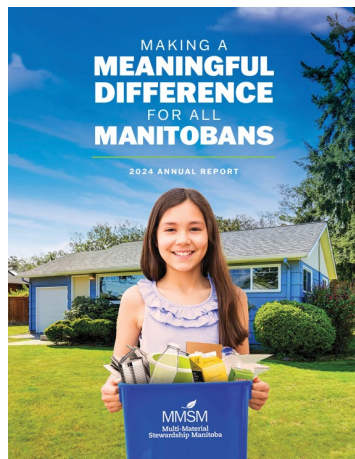
- MMSM celebrated its 15th anniversary on April 1, 2025, with a special event with stakeholders.
- During the year, MMSM further expanded recycling access to Manitoba's remote communities.
- MMSM incorporated government feedback into its Transition Plan; a public consultation period expected fall 2025, with ministerial approval to follow.
- *New [Membership Agreement](#) effective January 1, 2026, replaces existing MMSM Rules.*

Founded in 2010, Multi-Material Stewardship Manitoba Inc. (MMSM) is a not-for-profit, industry-funded organization for residential recycling programs for packaging and printed paper.



PROGRAM PERFORMANCE

- In June 2025, MMSM published its [2024 MMSM Annual Report](#), which highlighted a 71.8% recovery rate in 2023. See additional performance metrics in the table.



MMSM Performance			
	2024	2023	YOY VARIANCE
RECYCLING PERFORMANCE			
Collected Tonnes ¹	59,394	62,203	-4.5%
Supplied Tonnes (Reported by Producers)	85,759	86,655	-1.0%
Recovery Rate	69.3%	71.8%	-2.5%
Population Served by PPP Program	1,275,112	1,274,727	0.0%
Recovered KG per Capita	46.6	48.8	-4.5%
ACCESSIBILITY PERFORMANCE			
# Households Served	547,732	547,311	0.1%
% Households with Access to PPP Program ²	95%	95%	0.0%
Promotion & Education Cost per Capita ²	\$0.83	\$0.80	4.0%
COST PERFORMANCE			
Collected Tonnes ¹	59,394	62,203	-4.5%
Net Cost ³	\$34,446,555	\$35,512,951	-3.0%
Net Cost per Tonne	\$580	\$571	1.6%
Net Cost per Capita	\$27	\$28	-3.0%
Promotion & Education Cost per Capita ²	\$0.83	\$0.80	4.0%

¹ Given the shared EPR program model in Manitoba, Collected Tonnes are based on datasets that consist of data from Cost Monitoring Survey (CMS) and Municipal Online Reporting System (MORS).

² Total Municipal and MMSM promotion and education.

³ Net costs include 100% of municipal costs and 100% of commodity revenues. Also included are MMSM's promotion and education, regulatory, market development and all other program management costs.

2026 BUDGET

- Fee budget of \$24.7 million represents a 5.7% increase from 2025.
- Increase driven mainly by higher supply chain costs.

MMSM Fee Budget (\$ in Millions)			
	2026	2025	YOY VARIANCE
Shared Model Obligation Share	80%	80%	
Supply Chain Costs ¹	\$21.9	\$19.9	9.6%
Promotion & Education	\$0.74	\$0.71	4.5%
Program Management ²	\$2.0	\$2.7	-24.5%
Program Management as % of the Cost Budget	8.3%	11.6%	-3.3%
Total Cost Budget	\$24.6	\$23.4	5.5%
Reserve Accumulation / (Drawdown)	\$0.04	-\$0.002	1796.1%
Total Fee Budget	\$24.7	\$23.4	5.7%
Additional Information			
Collected Tonnes (Forecasted)	61,546	61,457	0.1%
Supply Tonnes (Reported by Producers)	85,759	86,655	-1.0%
Average fee rate (cents per kg) (Total fee budget/supply tonnes)	28.8 c/kg	26.9 c/kg	6.8%

2026 FEE SCHEDULE

MMSM FEE SCHEDULE (CENTS/KG)				
CATEGORY	MATERIAL	2026 FEE RATES (cents/ kg)	2025 FEE RATES (cents/ kg)	VARIANCE %
PRINTED PAPER	Newsprint - Publishers	29.45	27.97	5.3%
	Newsprint - Other	31.96	31.2	2.4%
	Magazines and Catalogues	25.59	24.21	5.7%
	Telephone Books	24.76	24.52	1.0%
	Other Printed Paper	36.23	32.45	11.6%
PAPER PACKAGING	Corrugated Cardboard	26.7	22.93	16.4%
	Boxboard	15.65	14.16	10.5%
	Gable Top Cartons	48.61	44.44	9.4%
	Paper Laminates	41.76	34.4	21.4%
	Aseptic Containers	34.54	33.59	2.8%
PLASTICS	PET Containers and Bottles	33.25	30.57	8.8%
	HDPE Containers and Bottles	-2.76	-18.43	85.0%
	Plastic Film	73.04	74.76	-2.3%
	Plastic Laminates	73.84	71.58	3.2%
	Polystyrene	135.33	118.47	14.2%
	Other Plastics	45.67	44.73	2.1%
STEEL	Steel Food & Beverage Cans	27.88	29.12	-4.3%
	Steel Aerosols	21.94	22.7	-3.3%
	Other Steel Containers	17.52	17.24	1.6%
ALUMINUM	Aluminum Food & Beverage Cans	-15.43	-11.51	-34.1%
	Other Aluminum Packaging	17.69	14.63	20.9%
GLASS	Clear Glass	22.19	21.47	3.4%
	Coloured Glass	21.66	20.68	4.7%



HDPE Containers and Bottles, Paper Laminates, Other Aluminum Packaging



Aluminum Food & Beverage Cans

The Fee Schedule and the Cause of Change graphs for each material can be viewed on the [Producer Guide](#).

2026 FLAT FEES

- Eligible stewards have an option to submit detailed supply data reports, or they may choose to pay flat fees instead.
- Low-volume flat fee rates have increased by \$100 each due to increase in the overall fee budget.

MMSM LOW VOLUME FEES			
TOTAL SUPPLIED (KG)	2026	2025	VARIANCE %
1,000 - 2,499	\$ 1,000	\$ 900	11.1%
2,500 - 5,000	\$ 2,000	\$ 1,900	5.3%

THREE YEAR BUDGET FORECAST

- The 2025 and 2026 budgets presented in the table below are reflective of the current 80% shared cost EPR model in Manitoba
- Budgets for 2027 and 2028 reflect the transition to full EPR and 100% producer funding; supply chain costs based on commercial contracts with collection and post-collection service providers.
- Projecting two thirds of municipalities transitioned to full EPR in 2027 and all municipalities transitioned by 2028. Supply chain costs are forecast to increase by 50% based on cost increases observed in other transitioning jurisdictions across Canada.

Cost Budget Forecast (\$ in Millions)							
	2025 Budget	2026 Budget	2027 Draft Forecast Budget	2028 Draft Forecast Budget	Variance % 2026 vs. 2025	Variance % 2027 vs. 2026	Variance % 2028 vs. 2027
	(a)	(b)	(c)	(d)	(e)= (b-a)/a	(f)= (c-b)/b	(g)= (d-c)/c
Supply Chain Costs ¹	\$19.9	\$21.9	\$34.8	\$43.7	9.9%	58.7%	25.7%
Promotion & Education	\$0.71	\$0.74	\$0.73	\$0.74	4.5%	-1.9%	1.3%
Program Management ²	\$2.7	\$2.0	\$4.5	\$5.0	-24.5%	118.8%	11.3%
Total Costs	\$23.4	\$24.7	\$40.0	\$49.4	5.7%	61.9%	23.6%
Additional Information							
Collected Tonnes (Forecasted)	61,457	61,546	62,162	62,783	0.1%	1.0%	1.0%
Households/Stops (contracted) ³	547,732	547,732	547,732	547,732	0.0%	0.0%	0.0%
Cost per tonne collected	\$380	\$401	\$643	\$787	5.6%	60.3%	22.4%
Cost per household	\$43	\$45	\$73	\$90	5.7%	61.9%	23.6%

Q&A





SK Recycles

Annual Producer Meeting
October 16, 2025

Sam Baker
Executive Director



2025 Update

SK Recycles (formerly Multi-Material Stewardship Western) was established in 2016 as a non-profit organization to help producers meet Household Packaging and Paper Stewardship Program Regulations.



- December 2024 marked the start of the transition to full EPR in Saskatchewan with producers assuming operational and financial responsibility (shift from shared responsibility program).
 - Transition Phases: Phase 1 (Dec. 1, 2024); Phase 2 (Feb 1, 2026), Phase 3 (Feb. 1, 2027 - focus on depots).
 - Adjustment of Phase 2 communities will shift transition completion by approximately two months later to early 2028.
- Operational progress continues:
 - Working closely with Phase 1 transitioning communities.
 - Launching promotion and education campaigns to ensure residents have information to recycle effectively.



Program Performance



- In July 2025, SK Recycles published its [2024 Annual Report](#) on program performance, which included a 66.3% recovery rate. For more performance metrics, see the table.



SK Recycles Performance			
	2024	2023	YOY VARIANCE
RECYCLING PERFORMANCE			
Collected Tonnes	36,758	35,774	2.8%
Supplied Tonnes	55,446	55,444	0.0%
Recovery Rate	66.3%	64.5%	1.8%
Population Served by PPP Program ¹	936,000	933,450	0.3%
Recovered KG per Capita	39.3	38.3	2.5%
ACCESSIBILITY PERFORMANCE			
# Households Served ¹	382,000	380,886	0.3%
% Households with Access to PPP Program ¹	84.9%	84.7%	0.2%
COST PERFORMANCE			
Collected Tonnes	36,758	35,774	2.8%
Net Cost	\$20.8M	\$19.1M	8.7%
Net Cost per Tonne	\$566	\$535	5.8%
Net Cost per Capita	\$22	\$21	8.5%
Promotion & Education Cost per Capita	\$0.26	\$0.06	341.4%

¹ Represents access to curbside, multi-family and/or depot services.

2026 Budget



- 2026 budget reflects the continual onboarding of Phase 1 and initiation of Phase 2 of the EPR transition.
- Promotion and education activities will continue to expand to support the transition and inform Saskatchewan residents about the SK Recycles program.
- The impact of the delayed joining of Phase 1 & 2 communities in 2025 is a 2025 budget surplus projected at \$8.8 million.
 - SK Recycles plans to use the surplus to offset producer fee increases and continue to build program reserves.
- Budget includes an \$8 million drawdown of accumulated surplus to ensure the average fee rate for 2026 remains flat.

2026 Fee Budget



- The 2026 cost budget of \$38.9 million is a 12.6% increase from 2025.
- Cost budget increases are offset by an \$8 million reserve drawdown which decreases the 2026 total fee budget by 5.1% from the previous year.

SK Recycles Fee Budget (\$ in Millions)			
	2026	2025	YOY VARIANCE
Supply Chain Costs	\$35.3	\$31.7	11.4%
Promotion & Education	\$0.8	\$0.7	20.2%
Program Management	\$2.8	\$2.2	28.0%
Program Management as % of the Cost Budget	7.2%	6.3%	0.9%
Total Cost Budget	\$38.9	\$34.5	12.6%
Reserve Accumulation / (Drawdown)	-\$8.0	-\$2.0	300.0%
Total Fee Budget	\$30.9	\$32.5	-5.1%
Additional Information			
Collected Tonnes (Forecasted)	39,339	38,417	2.4%
Supply Tonnes (Reported by Producers)	49,879	52,559	-5.1%
Average fee rate (cents per kg) (Total fee budget/supply tonnes)	62 c/kg	62 c/kg	0.0%

2026 Fee Schedule



SK RECYCLES FEE SCHEDULE (CENTS/KG)				
CATEGORY	MATERIALS	2026 FEE RATES (cents/ kg)	2025 FEE RATES (cents/ kg)	VARIANCE %
PRINTED PAPER	Newsprint	63.00	64.00	-1.6%
	Magazines, Catalogues & Telephone books **	24.00	27.00	-11.1%
	Other Printed Paper	59.00	58.00	1.7%
PAPER PACKAGING	Corrugated Cardboard	53.00	51.00	3.9%
	Boxboard	31.00	31.00	0.0%
	Gable Top Cartons	77.00	73.00	5.5%
	Paper Laminates	67.00	68.00	-1.5%
	Aseptic Containers	57.00	55.00	3.6%
PLASTICS	PET Bottles	87.00	86.00	1.2%
	HDPE Bottles	60.00	64.00	-6.3%
	Plastic Film	119.00	115.00	3.5%
	Plastic Laminates	124.00	131.00	-5.3%
	Polystyrene	216.00	253.00	-14.6%
	Other Plastics	79.00	72.00	9.7%
STEEL	Other Steel Packaging including Paint cans **	47.00	49.00	-4.1%
ALUMINUM	Aluminum Food & Other Containers	75.00	90.00	-16.7%
	Other Aluminum Packaging	73.00	91.00	-19.8%
GLASS	Clear Glass	31.00	30.00	3.3%
	Coloured Glass	31.00	30.00	3.3%



Other Plastics, Corrugated Cardboard, Gable Tops, Aseptics, Plastic Film and Glass



Aluminum Food & Other Containers, Other Aluminum Packaging, Steel, Polystyrene, HDPE Bottles, Magazines

The Fee Schedule and the Cause of Change graphs for each material can be viewed on the [Producer Guide](#).

*Telephone books and Steel Paint Cans have been rolled up in Magazines and Catalogues and Other Steel Packaging respectively.

2026 Low-Volume Flat Fees



- 5% decrease from 2025 consistent with overall budget decrease.

SK RECYCLES LOW VOLUME FEES			
TOTAL SUPPLIED (KG)	2026	2025	VARIANCE %
1,000 - 2,499	\$ 1,050	\$ 1,110	-5.4%
2,500 - 5,000	\$ 2,210	\$ 2,330	-5.2%

Three-Year Forecast

Forecasts for years 2025-2028 reflect the transition to full EPR.



Future Outlook (\$ in Millions)							
	2025 Budget	2026 Budget	2027 Draft Forecast Budget	2028 Draft Forecast Budget	Variance % 2026 vs. 2025	Variance % 2027 vs. 2026	Variance % 2028 vs. 2027
	(a)	(b)	(c)	(d)	(e) = (b-a)/a	(f) = (c-b)/b	(g) = (d-c)/c
Supply Chain Costs	\$31.7	\$35.3	\$41.1	\$43.7	11.4%	16.4%	6.2%
Promotion & Education	\$0.7	\$0.8	\$0.8	\$0.8	20.2%	1.7%	1.4%
Program Management	\$2.2	\$2.8	\$2.8	\$2.9	28.0%	1.7%	1.4%
Total Costs	\$34.5	\$38.9	\$44.7	\$47.3	12.6%	15.1%	5.8%
Additional Information							
Collected Tonnes (Forecasted)	38,417	39,339	40,283	42,345	2.4%	2.4%	5.1%
Households serviced	386,499	395,775	405,274	424,160	2.4%	2.4%	4.7%
Cost per tonne collected	\$899	\$988	\$1,110	\$1,118	9.9%	12.4%	0.7%
Cost per household	\$89	\$98	\$110	\$112	9.9%	12.4%	1.1%
Program Recovery Rate Target	72.5%	72.5%	72.5%	TBD			

Q&A



Circular Materials in Alberta

Blaire Gaalaas

**Managing Director
Alberta & the Yukon**

2025 Update

- On April 1, 2025, launched Phase 1 of Alberta's transition to EPR for packaging and paper products.
- Phase 1: 88 communities receiving curbside collection and 216 communities receiving depot services.
- Phase 2* (launching October 1, 2026):
 - 54 new communities, 121 new curbside programs (Phase 1 depots to curbside transitions) and multi-family dwellings not serviced by municipalities (currently 800 buildings).
 - Preparation for Phase 2: curbside collection RFP was issued in September and establishing receiving facility network and pre-conditioning facilities.*(*Stats as of October 1, 2025)*
- Continued to work with the regulator and government of Alberta on guidance related to flexible plastics regulation and producer reporting requirements.



On April 1, 2025, we celebrated the launch of Alberta's EPR program.

2026 Fee Budget

- Despite an increase in 2026 cost budget, the average fee rate remains consistent with the prior year (1% increase from 2025) due to increased producer supply volumes and a reserve draw down authorized by the Board to offset producer fees.
- Total 2026 budget costs increased by 25% mainly driven by: 12 months of operations costs (compared to 9 month of operations costs for 2025); the annualization of costs for Phase 1 and rollout of Phase 2.

Circular Materials in Alberta Fee Budget (\$ in Millions)			
	2026	2025	Variance %
Supply Chain Cost	\$173.4	\$141.0	23.0%
Promotion & Education Cost	\$5.3	\$2.9	82.8%
Program Management Cost	\$9.9	\$7.0	42.1%
Program Management as % of the Cost Budget	5.3%	4.6%	0.6%
Total Cost Budget	\$188.6	\$150.9	25.0%
Reserve Accumulation / (Drawdown)	-\$4.7	\$21.1	-122.5%
Start up cost recovery	\$2.0	\$1.0	100.0%
Total Fee Budget	\$185.9	\$173.0	7.5%
Additional Information			
Collected Tonnes (Forecasted)	220,899	144,225	53.2%
Supply Tonnes (Reported by Producers)	226,392	213,176	6.2%
Average fee rate (cents per kg) (Total fee budget/supply tonnes)	83 c/kg	82 c/kg	1.2%

2026 Fee Schedule

*Kraft Paper, HDPE
Containers, Non-Expanded
Polystyrene*



*Magazines & Catalogues,
Newspapers*



The Fee Schedule and the Cause of Change graphs for each material can be viewed on the [Producer Guide](#).

CIRCULAR MATERIALS ALBERTA FEE SCHEDULE (CENTS/KG)				
CATEGORY	MATERIAL	2026 FEE RATES (cents/ kg)	2025 FEE RATES (cents/ kg)	VARIANCE %
PAPER	Newspapers	83	84	-1.2%
	Newsprint (inserts and circulars)	83	84	-1.2%
	Magazines and Catalogues	31	33	-6.1%
	Directories	31	33	-6.1%
	Other Printed Materials	89	89	0.0%
	Purchased Posters, Calendars, Greeting Cards and Envelopes	89	89	0.0%
	Paper for General Use	89	89	0.0%
	Kraft Paper Carry-Out Bags	101	69	46.4%
	Kraft Paper - Non-Laminated	101	69	46.4%
	Corrugated Cardboard	70	69	1.4%
	Boxboard and Other Paper Packaging	40	38	5.3%
	Gable Top Containers	91	85	7.1%
	Paper Laminates	91	85	7.1%
	Aseptic Containers	91	85	7.1%
RIGID PLASTIC	PET Containers, Jars and Jugs < 5 Litres	125	121	3.3%
	PET Containers, Jars and Jugs >= 5 Litres	125	121	3.3%
	PET Thermoform Containers < 5 Litres	125	121	3.3%
	HDPE Containers, Jars and Jugs < 5 Litres	63	48	31.3%
	HDPE Containers, Jars and Jugs >= 5 Litres	63	48	31.3%
	Expanded Polystyrene	364	353	3.1%
	Non-Expanded Polystyrene	165	146	13.0%
	Other Plastic Packaging (not listed Above) < 5 Litres	102	97	5.2%
	Other Plastic Packaging (not listed Above) >= 5 Litres	102	97	5.2%
	LDPE/HDPE Film	198	197	0.5%
FLEXIBLE PLASTIC	LDPE/HDPE Film Carry-Out Bags	198	197	0.5%
	Plastic Laminates	167	163	2.5%
	Other Steel Containers and Packaging	69	66	4.5%
METAL	Steel Aerosol Containers	59	56	5.4%
	Aluminum Food Containers	77	72	6.9%
	Aluminum Aerosol Containers	75	70	7.1%
	Other Aluminum Packaging	74	70	5.7%
	Clear Glass	45	44	2.3%
GLASS	Coloured Glass	45	44	2.3%

Three-Year Cost Budget Forecast

- 2027 is the first full year of transition.
- 2028 costs increase in line with projected consumer price index (CPI) and household growth.

Circular Materials in Alberta Cost Budget Forecast (\$ in Millions)							
	2025 Budget	2026 Budget	2027 Draft Forecast Budget	2028 Draft Forecast Budget	Variance % 2026 vs. 2025	Variance % 2027 vs. 2026	Variance % 2028 vs. 2027
	(a)	(b)	(c)	(d)	(e) = (b-a)/a	(f) = (c-b)/b	(g) = (d-c)/c
Supply Chain Costs	\$141.0	\$173.4	\$218.9	\$231.2	23.0%	26.2%	5.6%
Promotion & Education	\$2.9	\$5.3	\$6.1	\$6.3	82.8%	15.7%	2.9%
Program Management	\$7.0	\$9.9	\$10.2	\$10.5	42.1%	2.7%	2.7%
Total Costs	\$150.9	\$188.6	\$235.2	\$248.0	25.0%	24.7%	5.4%
Additional Information							
Tonnes Collected (Forecasted)	144,225	220,899	266,735	274,737	53.2%	20.7%	3.0%
Households/Stops (contracted)	1,581,434	1,909,275	1,966,553	2,025,550	20.7%	3.0%	3.0%
Cost per tonne collected	\$1,046	\$854	\$882	\$903	-18.4%	3.3%	2.4%
Cost per household/stop	\$95	\$99	\$120	\$122	3.5%	21.1%	2.4%

The information contained herein is confidential and for informational purposes and cannot be shared, distributed or reproduced by any medium in any form for any purpose. Any fees or charges are subject to revision. We reserve the right to modify or update any fee structures at any time. Circular Materials, MMSM, SK Recycles and Recycle BC will not be held liable for any inaccuracies, omissions or changes.

Q&A



ANNUAL PRODUCER MEETING

October 16, 2025

SAM BAKER

EXECUTIVE DIRECTOR



RECYCLEBCTM

2025 UPDATE

- Program Plan approval received in September 2025 (Plan originally submitted to Government in April 2023). Includes aggressive material category recovery targets, especially plastics, requiring an increase in collected tonnes.
- Recycle BC expanded the option of flexible plastics collection to all curbside and multi-family collection partners effective January 1, 2025, and continues to advance collection options.
- Recycle BC began competitively procuring for in-house post collection services (currently outsourced to a single service provider) to commence June 2026.
- Sam Baker assumed role of Executive Director; Tamara Burns continued as strategic advisor until retirement in September.
- Recycle BC and SK Recycles announced that effective January 1, 2026, they will amalgamate into a single entity and governance body, while continuing to operate as two provincial programs.



PROGRAM PERFORMANCE

- In July 2025, Recycle BC published its [2024 Annual Report*](#) on program performance. In 2024, Recycle BC successfully collected and managed over 208,000 tonnes of residential packaging and paper, resulting in a recovery rate of 83.3%. For more performance metrics, see table.



Recycle BC Performance			
	2024	2023	YOY VARIANCE
RECYCLING PERFORMANCE			
Gross Collected Tonnes	217,637	211,498	2.9%
Net Collected Tonnes ¹	208,484	201,033	3.7%
Supplied Tonnes	250,173	252,507	-0.9%
Recovery Rate	83.3%	79.6%	3.7%
Program Plan Recycling Target ²	See note**	See note**	
Total Population Served by PPP Program ³	5,675,009	5,502,666	3.1%
Recovered KG per Capita	36.7	36.5	0.6%
ACCESSIBILITY PERFORMANCE			
Total Households Served	2,138,442	2,080,639	2.8%
Per cent of Households with Access to PPP Program ³	99.5%	99.4%	0.1%
COST PERFORMANCE			
Net Collected Tonnes ¹	208,484	201,033	3.7%
Net Cost	\$ 151,167,745	\$ 143,982,670	5.0%
Net Cost per Tonne	\$725	\$716	1.2%
Net Cost per Capita	\$27	\$26	1.8%
Promotion & Education Cost per Capita	\$0.38	\$0.38	-0.1%

¹ Net tonnes collected and recovery rate reflect the exclusion of tonnes collected by Recycle BC on behalf of other stewardship programs for reporting in their annual reports.

² At the time of the 2024 Annual Report publication, the updated Program Plan had not yet been approved by the Ministry.

³ Represents access to curbside, multi-family and/or depot services. Calculation of Total Population Served has been updated by supplementing the 2021 census data (used in prior annual reports) with population estimates by Regional District from BC Stats for 2023 and 2024.

2026 FEE BUDGET

- The total fee budget of \$199.7 million represents a 18.2% increase from 2025 fee budget.
- Budget includes increases in supply chain costs due to post collection system investments and focus on the recovery of flexible plastics as per approved Program Plan. Total fee budget includes \$7.5 million reserve drawdown to offset 2026 producer fee increases.

Recycle BC Fee Budget (\$ in Millions)			
	2026	2025	YOY VARIANCE
Supply Chain Costs ¹	\$193.1	\$177.9	8.6%
Promotion & Education ²	\$3.9	\$2.2	75.6%
Program Management	\$10.2	\$8.8	15.8%
Program Management as % of the Cost Budget	4.9%	4.7%	0.2%
Total Cost Budget	\$207.2	\$188.9	9.7%
Reserve Accumulation / (Drawdown)	-\$7.5	-\$20.0	-62.5%
Total Fee Budget	\$199.7	\$168.9	18.2%
Additional Information			
Collected Tonnes (Forecasted) (Net of Third-Party Tonnes)	219,624	217,497	1.0%
Supply Tonnes (Reported by Producers)	248,300	247,688	0.2%
Average fee rate (cents per kg) (Total fee budget/ supply tonnes)	80 c/kg	68 c/kg	17.6%

¹ 2026 includes \$4.1 M in Step 4/market development fees attributable to Plastic Film and Plastic Laminates.

² 2026 includes \$0.5M in Step 4/market development fees attributable to Plastic Film and Plastic Laminates.

2026 BUDGET: Reserve Drawdown

Between 2022-2026, \$48.5 million has been returned to producers to reduce producer fees while maintaining a prudent reserve position.

- **2025 Budget Surplus:**
 - Projecting lower volume of tonnes managed and higher producer revenue which will result in \$5.2 million favorable outcome over budget.
- **2026 Budget Reserve Drawdown:**
 - To mitigate \$18.3 million cost increase in 2026, Board authorized a \$7.5 million drawdown of accumulated surplus.
 - This is consistent with Recycle BC's past practice of allocating surplus if any (including excess commodity revenue), to reduce producer fees where possible while also maintaining prudent reserves.

2026 FEE SCHEDULE

RECYCLE BC FEE SCHEDULE (CENTS/KG)				
CATEGORY	MATERIALS	2026 FEE RATES	2025 FEE RATES	VARIANCE %
		(cents/ kg)	(cents/ kg)	
PRINTED PAPER	Newsprint	76.00	69.00	10.1%
	Magazines, Catalogues & Telephone books **	29.00	28.00	3.6%
	Other Printed Paper	80.00	72.00	11.1%
PAPER PACKAGING	Corrugated Cardboard	60.00	53.00	13.2%
	Kraft Paper *	77.00	53.00	45.3%
	Boxboard	37.00	31.00	19.4%
	Gable Top Cartons	80.00	69.00	15.9%
	Paper Laminates	77.00	62.00	24.2%
	Aseptic Containers	91.00	83.00	9.6%
PLASTICS	PET Bottles	97.00	98.00	-1.0%
	PET Thermoforms *	134.00	98.00	36.7%
	HDPE Bottles	47.00	40.00	17.5%
	Plastic Film	184.00	146.00	26.0%
	Plastic Laminates	184.00	146.00	26.0%
	Expanded Polystyrene	407.00	310.00	31.3%
	Rigid Polystyrene	151.00	125.00	20.8%
	Other Plastics	101.00	86.00	17.4%
STEEL	Other Steel Packaging including Paint cans **	68.00	62.00	9.7%
	Steel Aerosols	48.00	42.00	14.3%
ALUMINUM	Aluminum Food & Other Containers	48.00	59.00	-18.6%
	Other Aluminum Packaging	70.00	67.00	4.5%
GLASS	Clear Glass	58.00	48.00	20.8%
	Coloured Glass	58.00	48.00	20.8%



Kraft Paper, PET thermoforms, Expanded and Rigid Polystyrene, Plastic Film and Plastic Laminates



PET Bottles, Aluminum Food & Other Containers

The Fee Schedule and the Cause of Change graphs for each material can be viewed on the [Producer Guide](#).

* Kraft Paper and PET thermoforms have been disaggregated from Corrugated Cardboard and PET Bottles respectively.
** Telephone books and Steel Paint Cans have been rolled up in Magazines and Catalogues and Other Steel Packaging respectively.

2026 LOW-VOLUME AND FLAT FEES

- Flat fee rates for low volume stewards increased by 15-18%, consistent with overall budget increase.

RECYCLE BC LOW VOLUME FEES			
TOTAL SUPPLIED (KG)	2026	2025	VARIANCE %
1,000 - 2,499	\$1,500	\$1,300	15.4%
2,500 - 4,999	\$3,500	\$3,000	16.7%
5,000 - 9,999	\$8,300	\$7,000	18.6%
10,000 - 15,000	\$13,900	\$11,800	17.8%

THREE YEAR COST BUDGET FORECAST

- Forecast reflects the increases in post collections costs required to meet new Program Plan material recovery performance targets.

Future Outlook (\$ in Millions)							
	2025 Budget	2026 Budget	2027 Draft Forecast Budget	2028 Draft Forecast Budget	Variance % 2026 vs. 2025	Variance % 2027 vs. 2026	Variance % 2028 vs. 2027
	(a)	(b)	(c)	(d)	(e)= (b-a)/a	(f)= (c-b)/b	(g)= (d-c)/c
Supply Chain Costs	\$177.9	\$193.1	\$209.6	\$220.5	8.5%	8.6%	5.2%
Promotion & Education	\$2.2	\$3.9	\$4.0	\$4.1	77.3%	3.0%	3.0%
Program Management	\$8.8	\$10.2	\$10.5	\$10.8	15.9%	3.0%	3.0%
Total Costs	\$188.9	\$207.2	\$224.1	\$235.5	9.7%	8.2%	5.1%
Additional Information							
Supply Tonnes (Reported by Producers)	247,688	248,300	250,000	250,000	0.2%	0.7%	0.0%
Collected Tonnes (net of third-party tonnes)	217,497	219,624	230,283	237,831	1.0%	4.9%	3.3%
Total Households serviced	2,154,829	2,155,173	2,174,544	2,199,282	0.0%	0.9%	1.1%
Total Population serviced	5,692,463	5,679,454	5,723,268	5,789,234	-0.2%	0.8%	1.2%
Cost per tonne collected \$/tonne	\$869	\$943	\$973	\$990	8.6%	3.2%	1.7%
Cost per household	\$88	\$96	\$103	\$107	9.7%	7.2%	3.9%
Cost per capita	\$33	\$36	\$39	\$41	9.9%	7.4%	3.9%
Promotion & Education cost per capita	\$0.39	\$0.69	\$0.70	\$0.72	77.7%	2.2%	1.8%
Net recovery rate	82.7%	83.3%	86.7%	89.6%	0.6%	3.4%	2.8%
Program Recovery Rate Target (excluding contamination)	79.0%	80.0%	80.0%	TBD	1.0%	0.0%	
Est. Program Recovery Rate to Meet Material Category Recovery Targets	86.0%	86.0%	87.0%	TBD	0.0%	1.0%	

Q&A



Circular Materials in the Yukon

Blair Gaalaas

**Managing Director
Alberta & the Yukon**



Yukon EPR Timeline



2024

EPR Legislation Enacted

O.I.C 2024/19

Effective January 25, 2024



2025

Yukon Stewardship Plan

Plan approval received February 1, 2025

(Permit 100-02)



2025

Phase 1 Launch: November 1, 2025

1. Curbside collection **2.** Depot collection **3.** Multi-family, schools & institutions **4.** Post collection



2027

Phase 2 Launch: May 1, 2027

Inclusion of small businesses; introduction of unified material list/collection

2025 Update

- On February 1, 2025, the Yukon Government approved Circular Materials' Stewardship Plan for Packaging, Paper and Single-Use Products, with a program start date of November 1, 2025.
- Ongoing work through Municipal and First Nations Working Group to support communities through transition.
- Work with Whitehorse Chamber of Commerce and Yukon Government to engage local producers and support understanding of their new EPR and fee obligations.
- August 2025: [outreach](#) to Yukon producers to share information and resources about EPR.
- September 2025: presented to Yukon producers at Whitehorse Chamber of Commerce meeting.

In April 2025, we conducted discovery meetings across the territory.



2026 Fee Budget

- Inaugural 2026 budget costs estimated for **14 months** of operations (program launches in November 2025).
- Costs are estimated on capped supply volumes. Given collection volume uncertainty; the Yukon government committed to pay for processing materials above 2,000 supply tonnes.
- To help offset producer fees, no reserves will be accumulated in 2026.

Circular Materials in the Yukon Fee Budget (\$ in Millions)	
	2026
Supply Chain Cost	\$4.0
Promotion & Education	\$0.3
Program Management	\$0.2
Program Management as % of the Cost Budget	4.6%
Total Cost Budget	\$4.5
Start up cost recovery	\$0.2
Reserve Accumulation / (Drawdown)	\$0
Total Fee Budget	\$4.7
Additional Information	
Tonnes Collected (Forecasted)	2,333
Supply Tonnes (Reported by Producers)	2,066
Average fee rate (cents per kg) (Total fee budget/supply tonnes)	227 c/kg

2026 Fee Schedule

- First Fee Schedule for the Yukon.
- As per the [Four Step Fee Methodology](#), supply volume is the denominator in the fee rate calculation formula. Therefore, lower overall supply volumes result in higher overall producer fees.
- The Yukon program's high costs and low supply volumes projected result in overall high fee rates in 2026.
- The 2026 Fee Schedule can be viewed on the [Producer Guide](#).

CIRCULAR MATERIALS YUKON FEE SCHEDULE (CENTS/KG)		
CATEGORY	MATERIAL	2026 FEE RATES (cents/ kg)
PAPER	Newspapers	167
	Newsprint (inserts and circulars)	167
	Magazines and Catalogues	167
	Directories	167
	Other Printed Materials	167
	Purchased Posters, Calendars, Greeting Cards and Envelopes	167
	Paper for General Use	167
	Kraft Paper Carry-Out Bags	127
	Kraft Paper - Non-Laminated	127
	Corrugated Cardboard	127
	Boxboard and Other Paper Packaging	127
	Gable Top Containers	282
	Paper Laminates	282
	Aseptic Containers	282
	PET Containers, Jars and Jugs < 5 Litres	268
RIGID PLASTIC	PET Containers, Jars and Jugs >= 5 Litres	268
	PET Thermoform Containers < 5 Litres	299
	HDPE Containers, Jars and Jugs < 5 Litres	268
	HDPE Containers, Jars and Jugs >= 5 Litres	268
	Expanded Polystyrene	939
	Non-Expanded Polystyrene	939
	Other Plastic Packaging (not listed Above) < 5 Litres	299
	Other Plastic Packaging (not listed Above) >= 5 Litres	299
	PLA, PHA, PHB	299
	LDPE/HDPE Film	566
FLEXIBLE PLASTIC	LDPE/HDPE Film Carry-Out Bags	566
	PLA, PHA, PHB - Plastic Film	566
	PLA, PHA, PHB Carry-Out bags	566
	Plastic Laminates	566
	Other Steel Containers and Packaging	191
METAL	Steel Aerosol Containers	191
	Aluminum Food Containers	410
	Aluminum Aerosol Containers	410
	Other Aluminum Packaging	410
	Clear Glass	116
GLASS	Coloured Glass	116

Three-Year Cost Budget Forecast

- 2026: Costs budgeted based on a capped collection volume as agreed with the Yukon Government who have committed to pay for processing materials above 2,000 supply tonnes.
- 2027–2028 outlook: 2026 baseline adjusted for projected consumer price index (CPI) and household growth and a minimum-to-maximum budget range is provided based on projected collection volumes between 2,000 to 4,600 tonnes. The maximum range assumes the inclusion of small businesses and materials currently on hold by the Yukon Government to help manage costs during early EPR implementation stage.

Circular Materials in the Yukon Cost Budget Forecast (\$ in Millions)							
	2026 Budget	2027 Draft Forecast Budget	2028 Draft Forecast Budget	2027 Draft Forecast Budget	2028 Draft Forecast Budget	Variance % 2027 vs. 2026	Variance % 2028 vs. 2027
	(a)			(b)	(c)	(d) = (b-a)/a	(e) = (c-b)/b
Supply Chain Costs	\$4.0	\$3.6	\$3.7	\$5.1	\$5.2	27.4%	2.9%
Promotion & Education	\$0.3	\$0.3	\$0.3	\$0.3	\$0.3	2.0%	2.0%
Program Management	\$0.2	\$0.2	\$0.2	\$0.2	\$0.2	2.0%	2.0%
Total Costs	\$4.5	\$4.0	\$4.2	\$5.6	\$5.7	24.8%	2.8%
Additional Information							
Tonnes Collected	2,333	2,000	2,000	4,600	4,600	97.2%	0.0%
Households/Stops (contracted)	7,204	7,348	7,495	7,348	7,495	2.0%	2.0%
Cost per tonne collected	\$1,909	\$2,017	\$2,080	\$1,208	\$1,242	-36.7%	2.8%
Cost per household/stop	\$618	\$549	\$555	\$756	\$762	22.3%	0.8%

The information contained herein is confidential and for informational purposes and cannot be shared, distributed or reproduced by any medium in any form for any purpose. Any fees or charges are subject to revision. We reserve the right to modify or update any fee structures at any time. Circular Materials, MMSM, SK Recycles and Recycle BC will not be held liable for any inaccuracies, omissions or changes.

Q&A

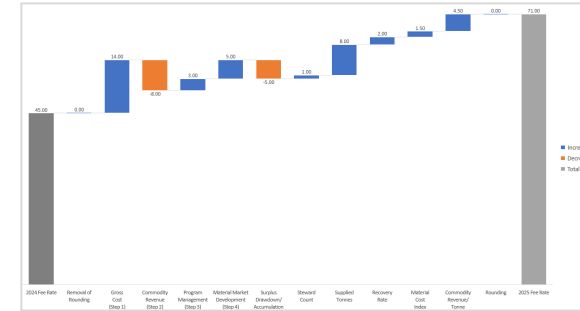


Producer Resources



Reminder: Producer Resources

- Fees 101 Video ([link](#))
- 2025 Report to Producers ([link](#))
- Fee Schedules and Cause of Change graphs ([link](#))
- National Material Fee Rates Excel file ([link](#))
- APM presentation & webinar replay ([link](#))



Fees and Invoices

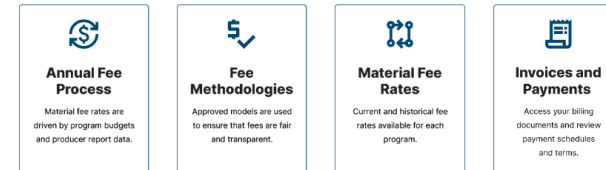
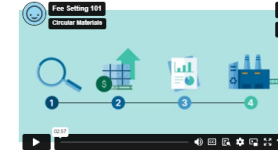
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Obligated producers/stewards pay annual fees based on the quantities of designated packaging and paper materials they supplied to consumers for their personal, family or household use.

The annual fee setting process is designed to ensure fairness and transparency. Fee rates for designated material categories cover the costs associated with the collection, transportation and processing of designated materials. Fee rates are expressed in cents/kg and calculated for each provincial program using approved methodologies. Invoices are distributed each January. For example, 2024 invoices are based on 2023 reports of 2022 supply data. Producers can choose to receive one annual invoice or quarterly invoices and there are various payment options.

Fees between programs are generally not directly comparable given the differences in the regulatory requirements, scope, funding obligations, system costs, material recovery performance and material definitions.

- Where are my invoice documents?
- What are invoice payment terms?
- Invoicing key dates
- Annual Producer Meetings (Budget & Fees)



Category	Consumer Materials New Brunswick Fee Schedule (2024 Fee Rates)			Variance %
	Material	2025 Fee Rate	2024 Fee Rate	
Paper	Newspapers	80.00	50.00	60.00%
	Newsprint (news and circular)	80.00	50.00	60.00%
	Magazines and Catalogs	80.00	50.00	60.00%
	Other Printed Materials	80.00	50.00	60.00%
	Purchased Posters, Calendars, Greeting Cards, Envelopes	80.00	50.00	60.00%
	Paper for General Use	80.00	50.00	60.00%
	Cardboard - Corrugated	51.00	38.00	56.8%
	Cardboard - Flat	51.00	38.00	56.8%
	Composite Cardboards	61.00	29.00	56.4%
	Boxboard and Paper/Paper Packaging	61.00	29.00	56.4%
	Flat Top Containers	81.00	38.00	56.4%
	Paper Packaging	81.00	38.00	56.4%
	Assorted Containers	81.00	38.00	56.4%
	PE Containers, Jars and Jugs x 5 Lites	121.00	73.00	65.8%
	PE Containers, Jars and Jugs x 5 Lites	121.00	73.00	65.8%
Plastic	PE Thermoplastic Containers < 5 Lites	131.00	79.00	68.0%
	HDPE Containers, Jars and Jugs x 5 Lites	57.00	20.00	65.0%
	HDPE Containers, Jars and Jugs x 5 Lites	57.00	20.00	65.0%
	HDPE Containers, Jars and Jugs x 5 Lites	57.00	20.00	65.0%
	Expanded Polystyrene	256.00	225.00	58.2%
Flexible	Non-Expanded Polystyrene	136.00	105.00	65.0%
	Other Plastic Packaging (not listed elsewhere) x 1 Lites	101.00	65.00	64.0%
	Other Plastic Packaging (not listed elsewhere) x 1 Lites	101.00	65.00	64.0%
	PE, LLDPE Film - Corrugated Bags	101.00	65.00	64.0%
	PE, LLDPE Film - Corrugated Bags	101.00	65.00	64.0%
Metal	PE, LLDPE Film - Corrugated Bags	101.00	65.00	64.0%
	PE, LLDPE Film - Corrugated Bags	101.00	65.00	64.0%
	PE, LLDPE Film - Corrugated Bags	101.00	65.00	64.0%
	PE, LLDPE Film - Corrugated Bags	101.00	65.00	64.0%
	PE, LLDPE Film - Corrugated Bags	101.00	65.00	64.0%
Glass	Aluminum Foil Containers	80.00	84.00	46.0%
	Aluminum Foil Containers	80.00	84.00	46.0%
	Other Aluminum Containers	80.00	84.00	46.0%
	Other Aluminum Containers	80.00	84.00	46.0%
	Other Aluminum Containers	80.00	84.00	46.0%

Q&A



Thank you!

