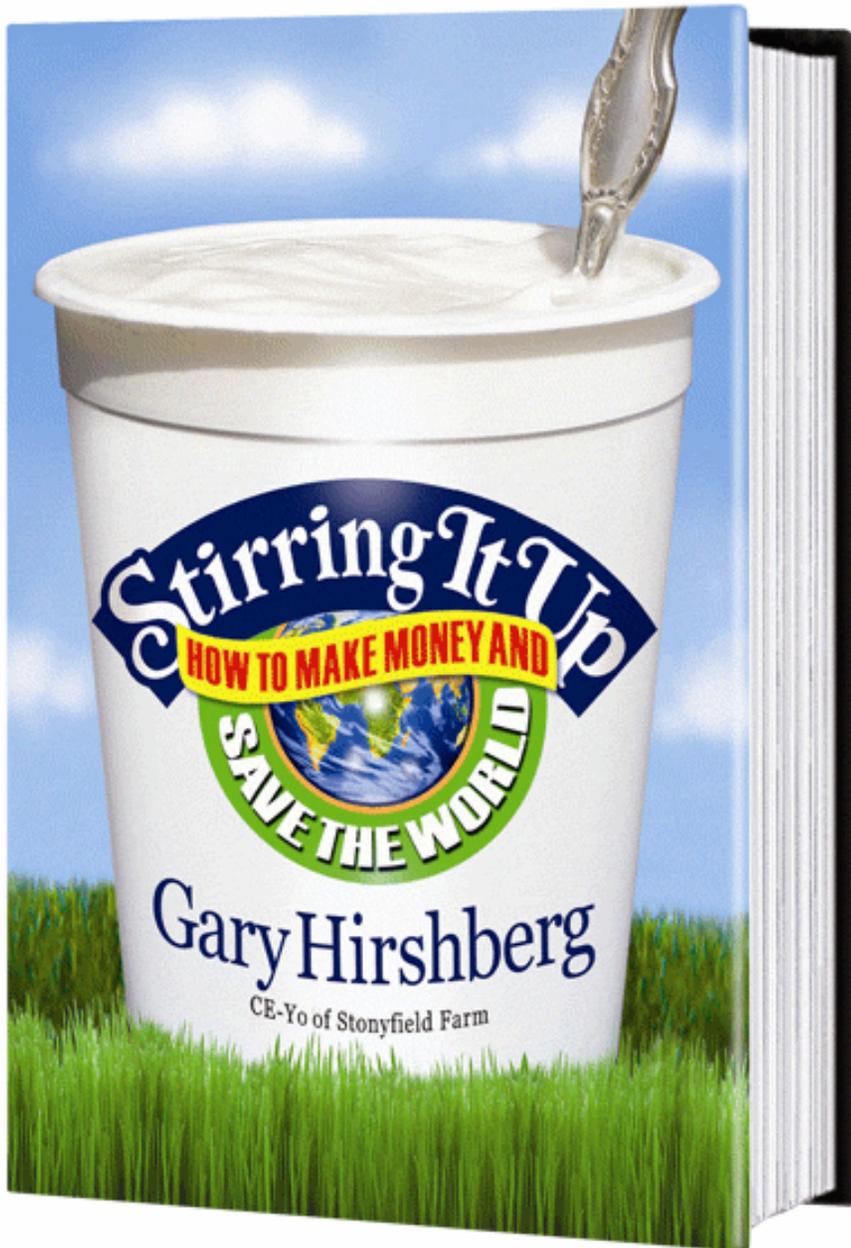




Stonyfield Farm Efforts to Reduce our Carbon Footprint

Gary Hirshberg
President and CE-Yo
March 10, 2008

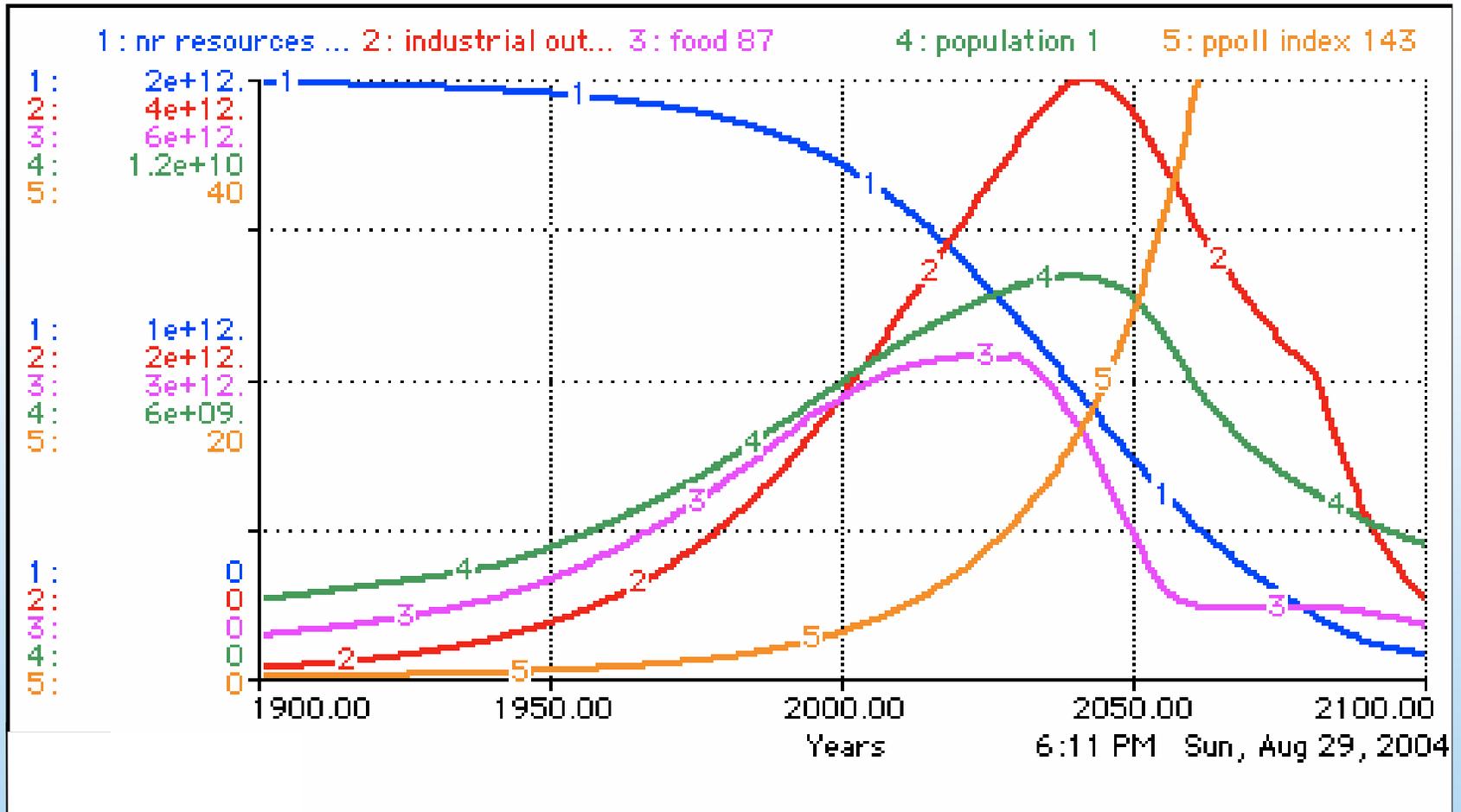




"Gary Hirshberg dared to dream new ways of doing business based on respect for customers, employees, and the earth. And, it worked. If you buy or sell anything, or simply want to feel hopeful about the future, this lively and legitimately optimistic book is worth every minute."

Robert Redford, actor, producer, director and environmentalist

STATE OF THE WORLD



State of the World

Source: Dennis Meadows, 2004

■ Natural Resources

■ Food

■ Industrial Output

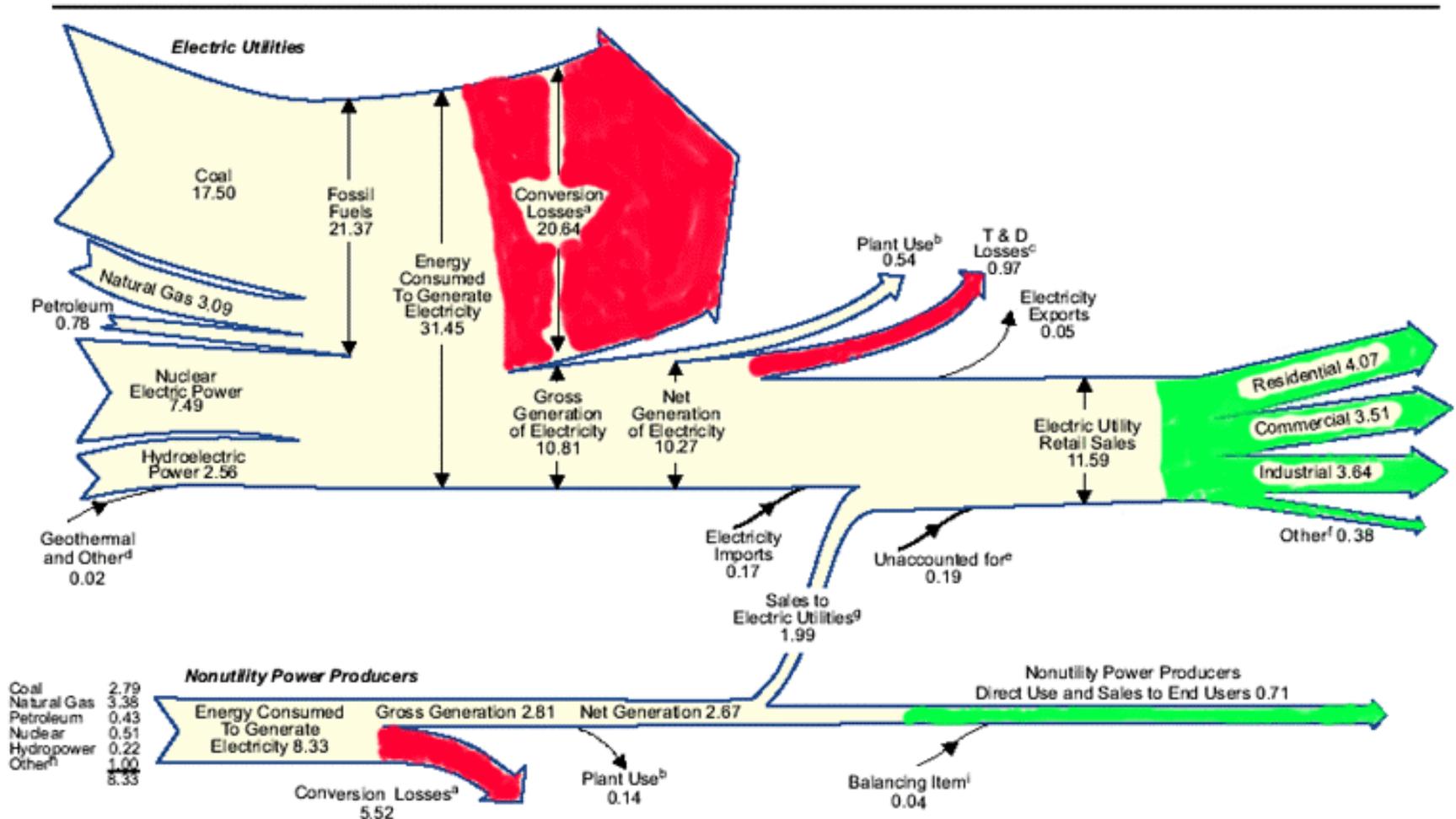
■ Population

■ Pollution

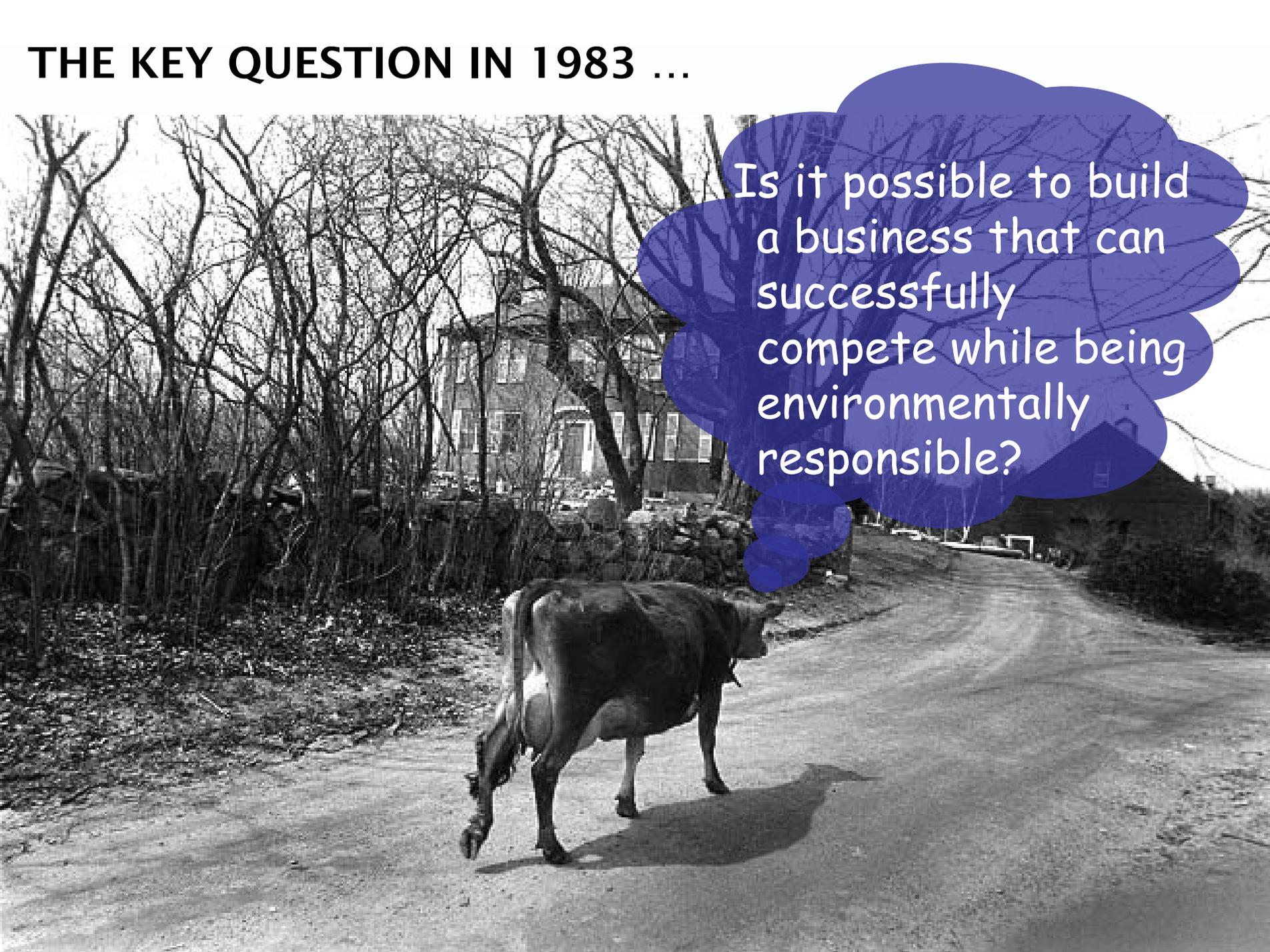
We waste more energy than Japan uses...

Diagram 5. Electricity Flow, 2000
(Quadrillion Btu)

From Energy Information Agency, USDOE, 2000 Annual Energy Review



THE KEY QUESTION IN 1983 ...



Is it possible to build a business that can successfully compete while being environmentally responsible?



19 yr. CAGR: 26.3%



Some of Stonyfield Farm's efforts to address climate change

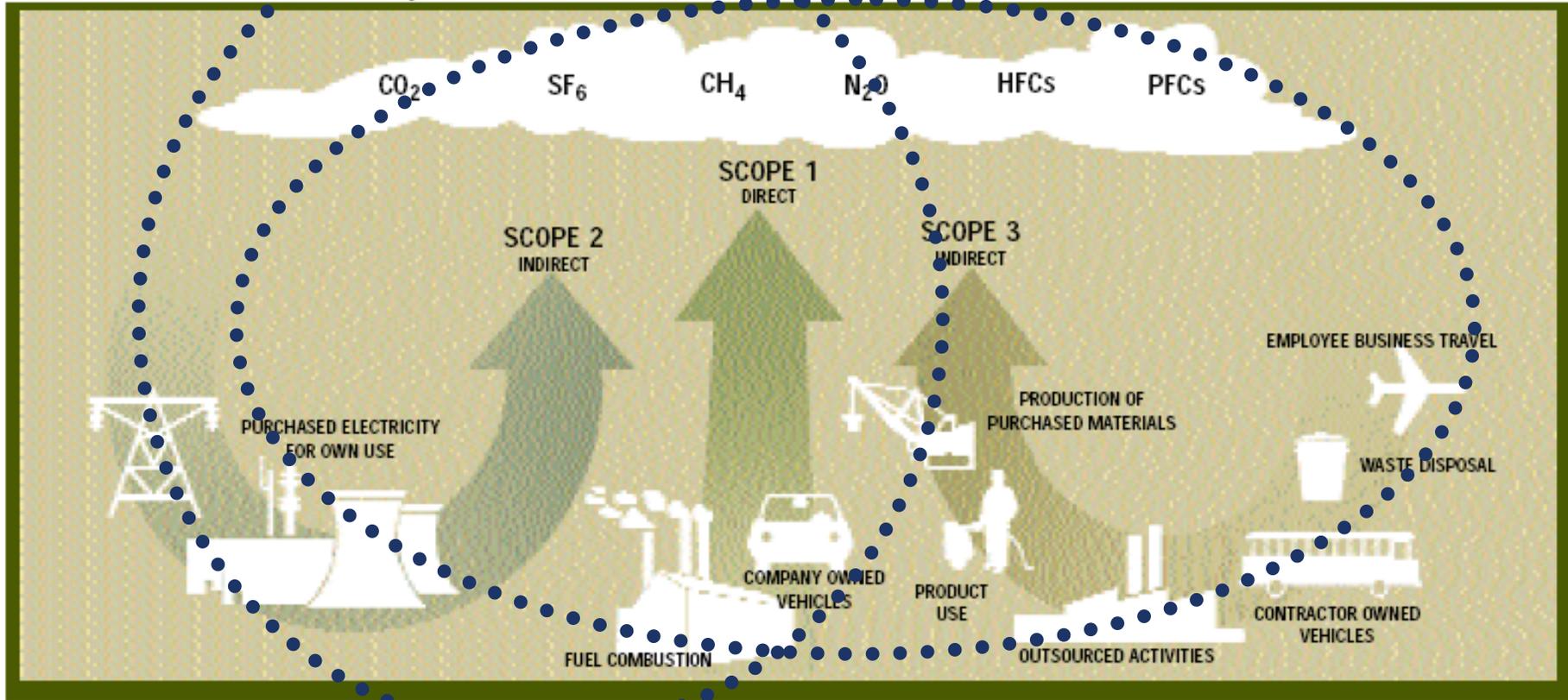
- ✓ Measuring our “carbon footprint”
- ✓ Reducing Emissions:
 - ✓ Energy Efficiency
 - ✓ Incorporating Renewable Energy
 - ✓ Supply Chain: Farming & Packaging
- ✓ Offsetting Emissions
- ✓ Education and Advocacy
- ✓ Reporting on Efforts

Measuring Our Impact

- Third Party Eco Audits (1994, 1997)
- Whole Company Carbon Footprint 1 (2000)
- Whole Company Carbon Footprint 2 (2006)

MEASURING OUR IMPACT

FIGURE 3. Overview of scopes and emissions across a value chain



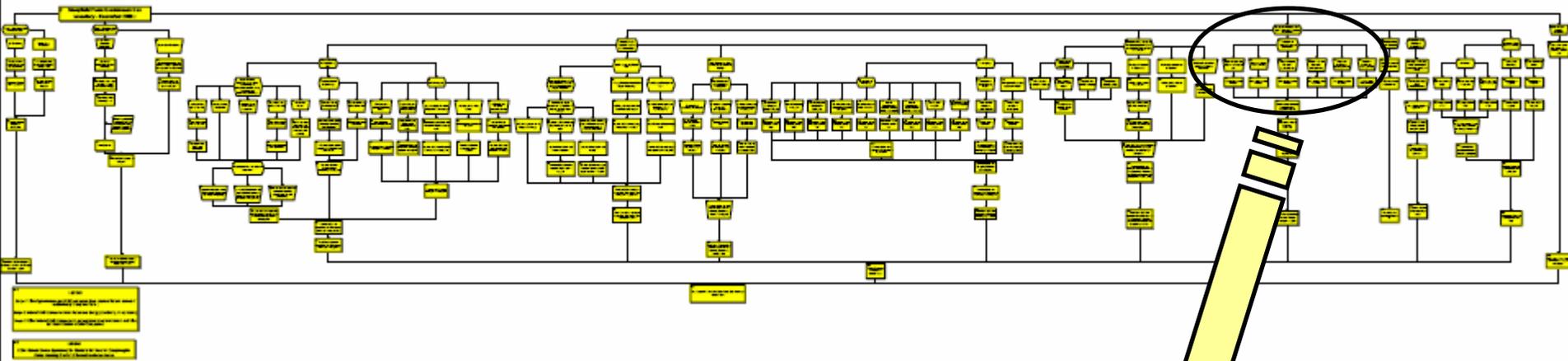
The Life of A Cup of Yogurt



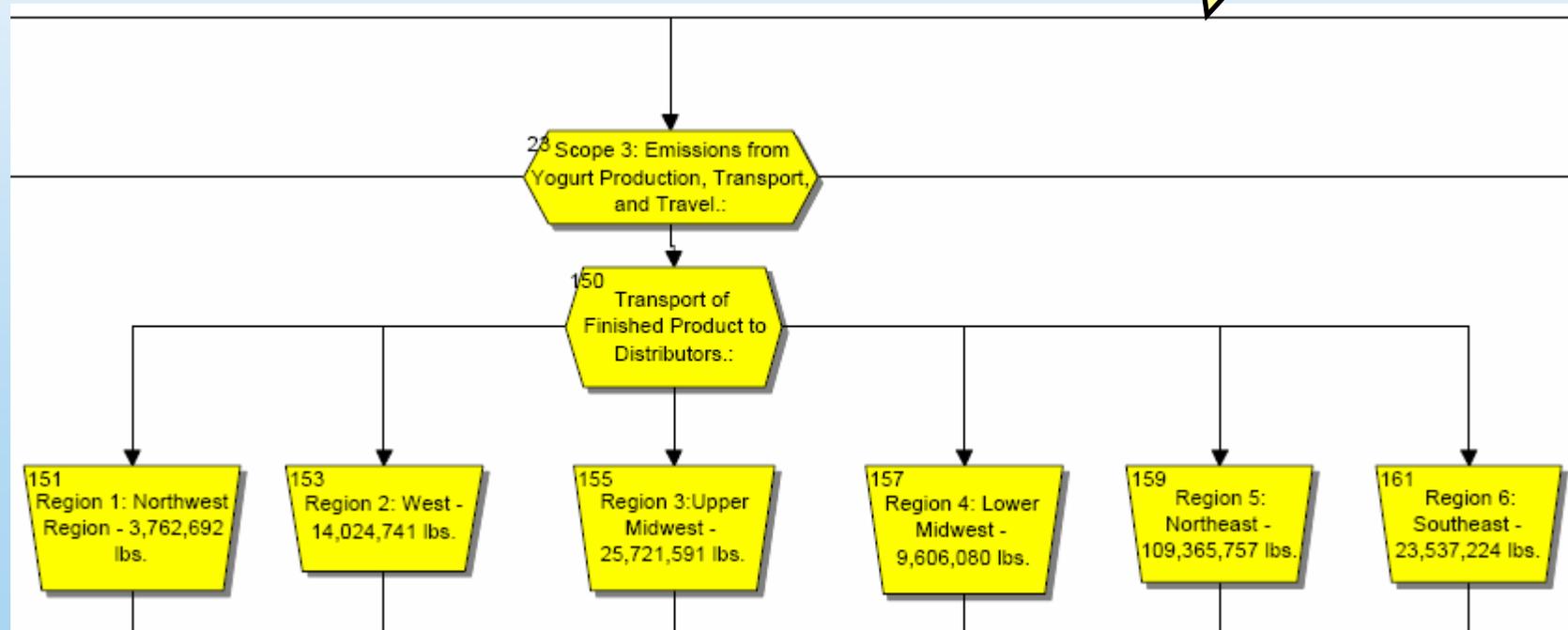
Components/Boundary of 2006 GHG Footprint



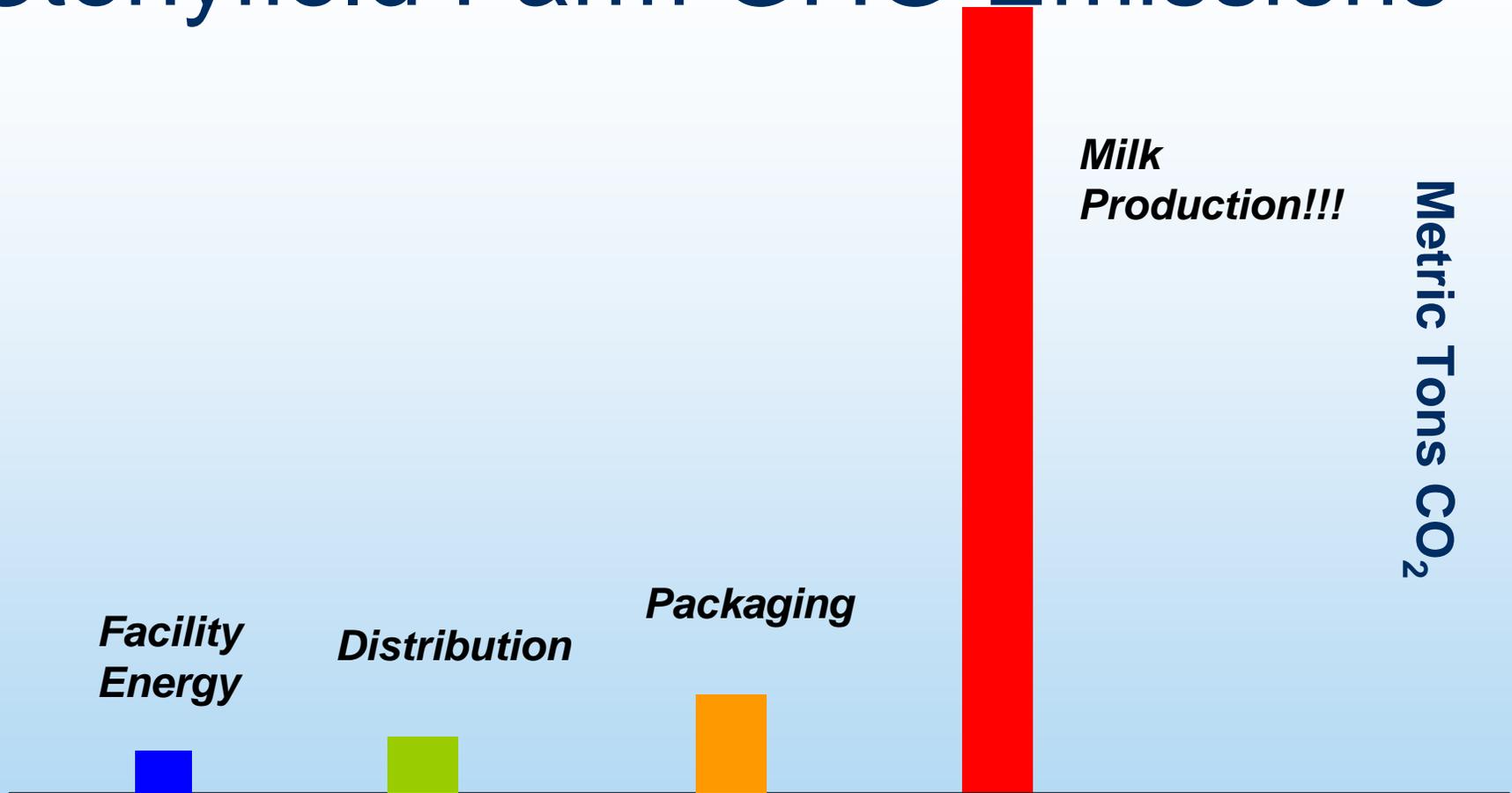
Stonyfield Farm GHG Inventory - November 2006



Comprehensive Analysis Measuring Greenhouse Gas Emissions from our Operations and Supply Chain



Stonyfield Farm GHG Emissions



*Facility
Energy*

Distribution

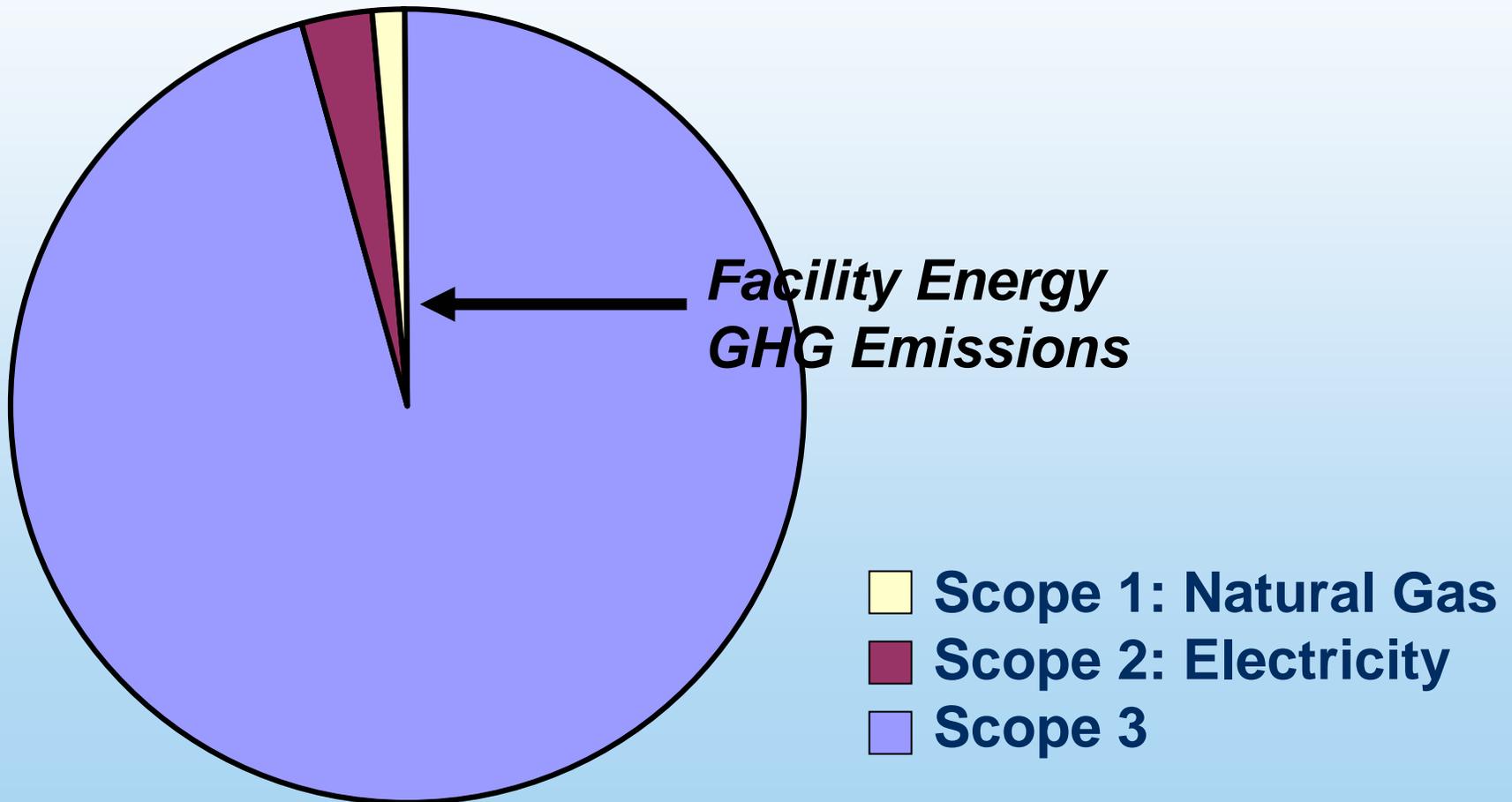
Packaging

*Milk
Production!!!*

Metric Tons CO₂

Stonyfield Farm and Brown Cow 2006 Greenhouse Gas Inventory:

Relative Contributions of Scope 1, 2 and 3



Key GHG Emissions Contributors

Milk Production

- Enteric emissions (#1)
- N₂O from manure and feed production
- On farm energy use
- Transport at each phase (feed and milk)
- Manure methane

Packaging

Material production of primary packaging #1

Distribution

Diesel

Facility Energy Use

Refrigeration, steam, air compressors

Role of Efficiency/Productivity

Spoilage and Usage



Reducing Emissions

– Milk Production

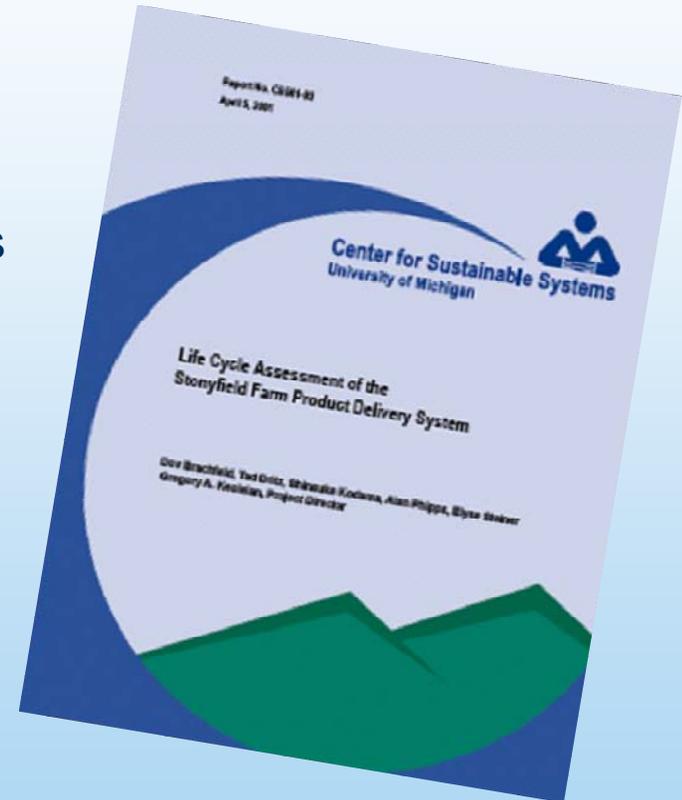
- Organic: 40% of energy used on non-organic farms goes into making chemical fertilizers and pesticides
- Methane digestion grants
- Composting grants
- Danone initiative to reduce enteric emissions

– Packaging

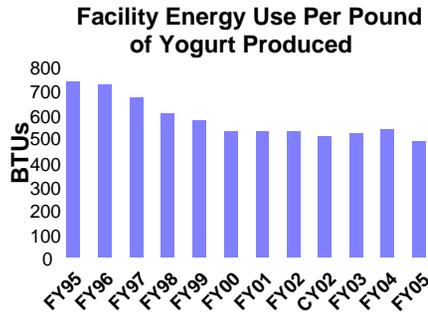
- Sustainable packaging scorecard
- Goals set
- U Michigan LCA

– Distribution

- Ryder engaged
- Metrics in place
- Study of DCs completed
- Efficiency measures being implemented



REDUCING EMISSIONS AT OUR PLANT



Facility Energy Between '95 and '05 achieved 33% reduction in energy use and CO2 emissions per lb of product



Solid Waste Prevented 18 million pounds of materials from going to landfills or incinerators



Renewables Largest photovoltaic solar array (50 kW) in NH; generating clean burning biogas from our waste water and negligible sludge byproduct

Wastewater Treatment (Anaerobic Hybrid Biological Treatment)

Innovation by Stonyfield Farm

- Runs partially on the biogas it generates
- 40% reduction in energy use
- 50% reduction in operating costs
- No sludge hauled away in 1.5 yrs.

Capital Costs

- 17% higher capital costs than aerobic (\$3.4MM vs \$2.9MM)

Expected Savings

- \$3.6MM over first 10 years



SOURCE: ADI Solution Based on 1st year actual operating costs

2006 LAUNCHED MISSION ACTION PROGRAM (MAP)



- Every employee trained in MAP
- Teams formed by impact area
- GHG reduction goals set
- Action plan development by those held accountable to the goals

**Accountability to
attaining goals** job
descriptions, performance
review, bonuses



Impact Area: Product Packaging
Team Charter: To create the most environmentally sustainable product packaging possible.

<p>Goal</p>	<p>What is the bold, visionary, aspiration of where SF wants to be? You may have long term and interim goals (ex. 3-5 year goal and/or a 20 yr bold, audacious goal)</p> <p>1. 100% Sustainable Packaging by 2015.</p> <p>Sustainable Packaging is that which:</p> <ul style="list-style-type: none"> • Is beneficial, safe & healthy for individuals and communities throughout its life cycle • Meets market criteria for performance and cost • Is sourced, manufactured, transported, and recycled using renewable energy • Maximizes the use of renewable or recycled source materials • Is manufactured using clean production technologies and best practices • Is made from materials healthy in all probable end of life scenarios • Is physically designed to optimize materials and energy • Is effectively recovered and utilized in biological and/or industrial cycles to create cycles. <p>* From Sustainable Packaging Coalition, 2009</p> <p>2. From 2007-2015, 10% annual improvement in sustainable packaging</p>
<p>Objectives</p>	<p>What are the steps needed to achieve the goal?</p> <ul style="list-style-type: none"> - Create baseline sustainability score of our packaging system from which to measure improvement - Inventory current packaging system including amount and types of materials such as resins, inks, dyes, adhesives, corrugate, palletization efficiency, etc. <ul style="list-style-type: none"> i. Identify opportunities to optimize our existing packaging system i.e. thin walling, incorporating recycled material, etc. ii. Identify potential innovations to transform our packaging

...ges made to
 ...optimize,
 ...is and
 ...ance of
 ...egrate with
 ...nificantly impact
 ...ements must
 ...company.
 ...ups and
 ...sting.
 ...nvolving. They
 ...rise groups are
 ...is functions.

Sustainable Outcomes** Outcome measures for each task.
the 4 oz (257k lbs reduction in PS)
1 gram (33k lbs HDPE reduction)
1 gram (88k lbs HDPE reduction)
1 packaging format for either 4 oz FFS
packaging materials, associated MSC's, also include a system for routinely

to so considering options only usable on our existing fillers →
 trial to sell the fillers to other Groupe Danone entities
 ating: risk of consumer acceptance and failure → Education or
 turnication program
 inner refusal or resistance → Education or communication program
 lance to use up proven technology (internally, Groupe Danone,
 ment, etc...) →

Date Drafted: Date Revised:	Date Drafted: Date Revised:
an members, targeted skills.	management investment, zons
ed by National	_____
opt budgets)	_____
tes	_____
Resources.	_____
solutions to it.	_____
ood by Groupe joined	_____

TEAMS BUILDING THE FUTURE



Transport/Distribution



Incoming Materials Transport and the Materials



Facility GHG Emissions



Water



Plant Spoilage /Usage



Green Chemistry



Sustainable Packaging



Events Community Marketing, Marketing, Employee Events, Office Purchases



Milk Production



Zero Waste



Conclusion, The Bottom Line for NH

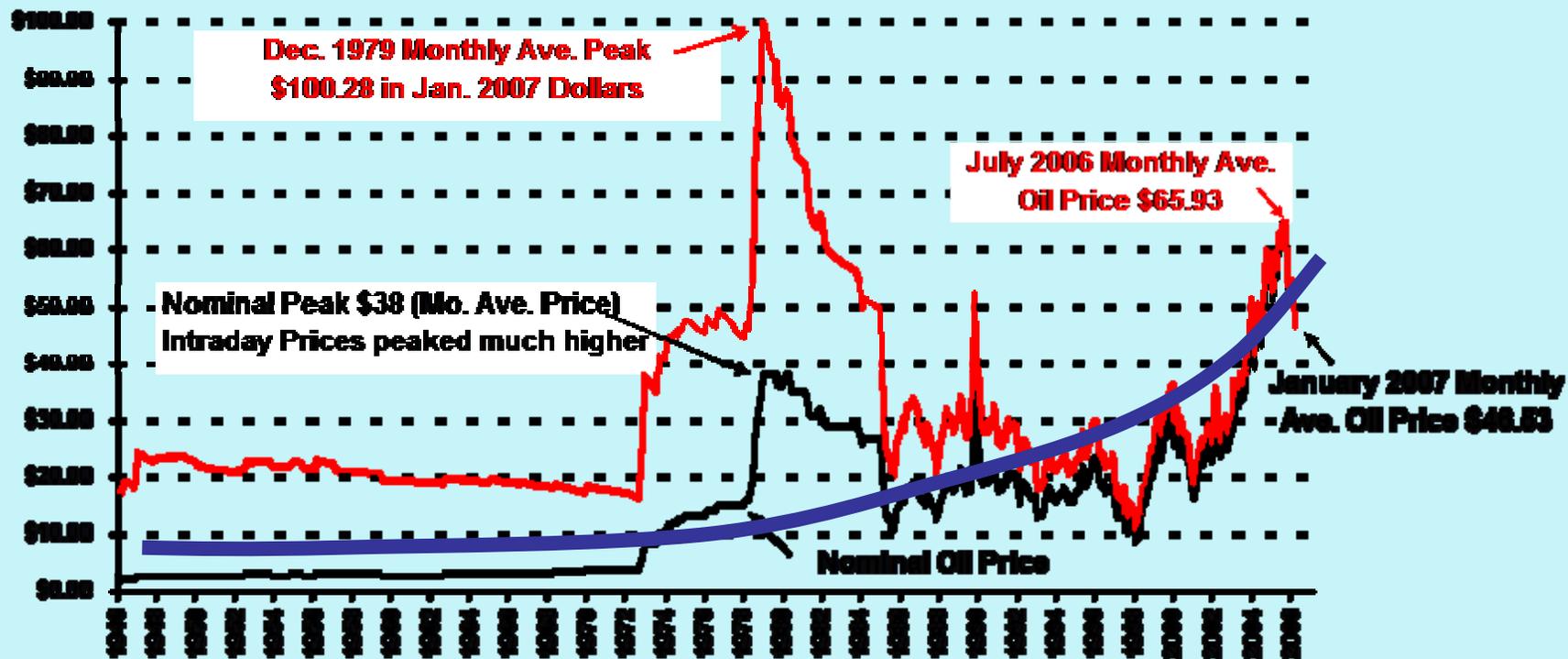
\$

OR NOT
Jobs

Competitive Advantage

Fossil Costs are Trending Upward

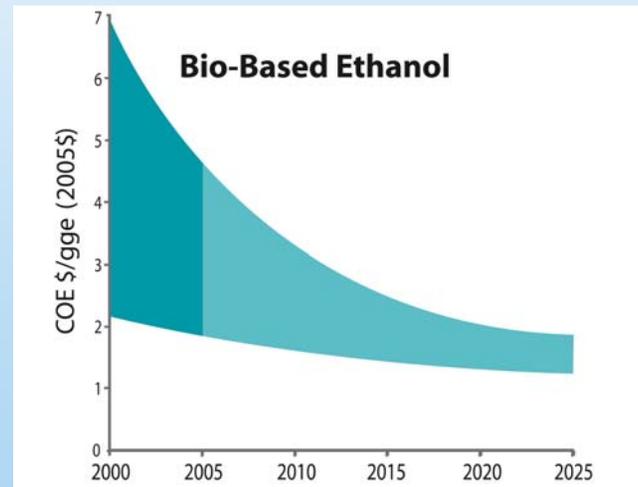
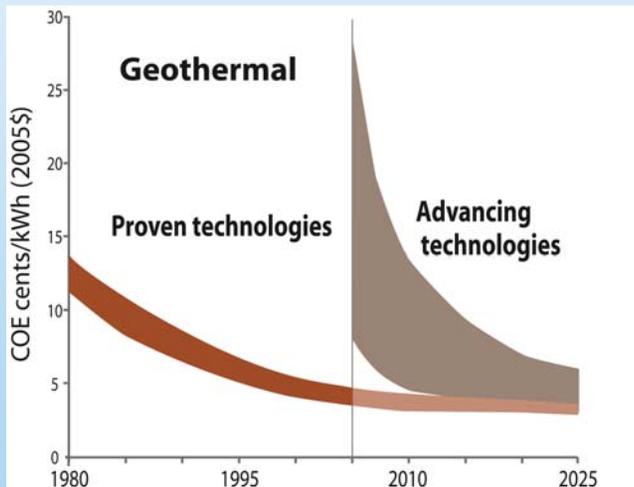
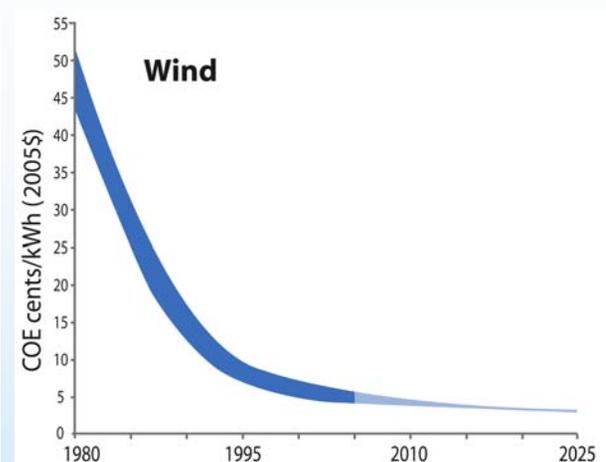
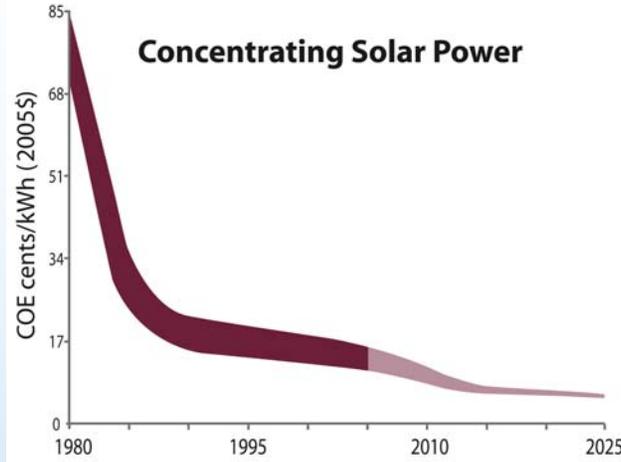
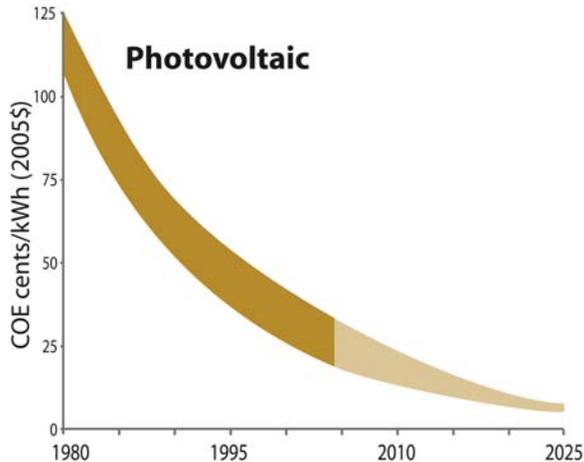
**Inflation Adjusted Monthly CRUDE
OIL PRICES (1946- Present)
In Jan 2007 Dollars
© www.InflationData.com
Updated 2/22/07**



Nominal Monthly Ave. Oil Price
Inflation Adjusted Monthly Average Oil Price

Source of Data:
Oil Prices- www.eia.com/Special/weekly_hist.htm
CPI-U Inflation Index- www.bls.gov

...While RE Costs Trend Downward

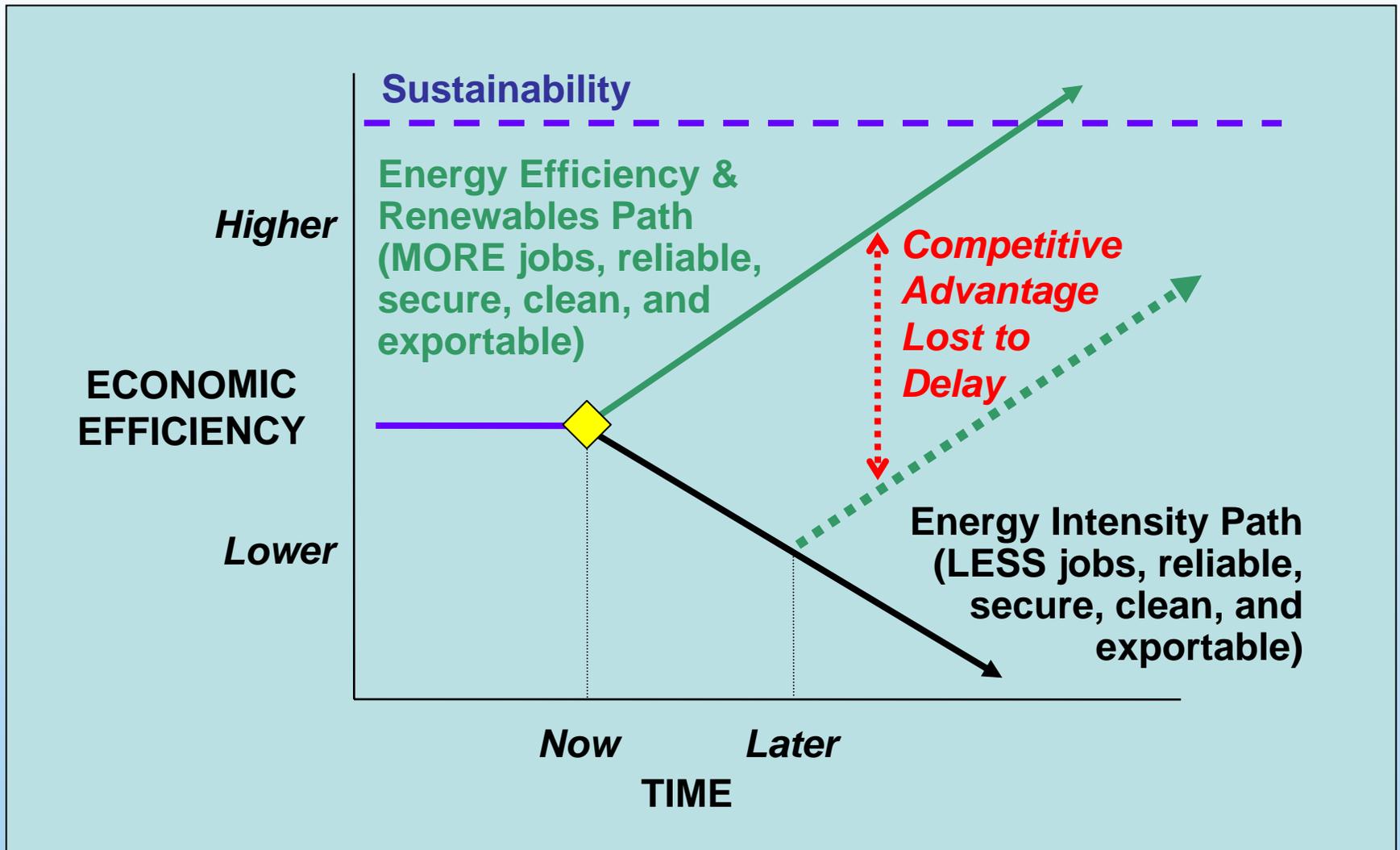


Levelized cost of energy in constant 2005\$¹

Source: NREL Energy Analysis Office (www.nrel.gov/analysis/docs/cost_curves_2005.ppt)

¹These graphs are reflections of historical cost trends NOT precise annual historical data. DRAFT November 2005

Old or New Energy Path?

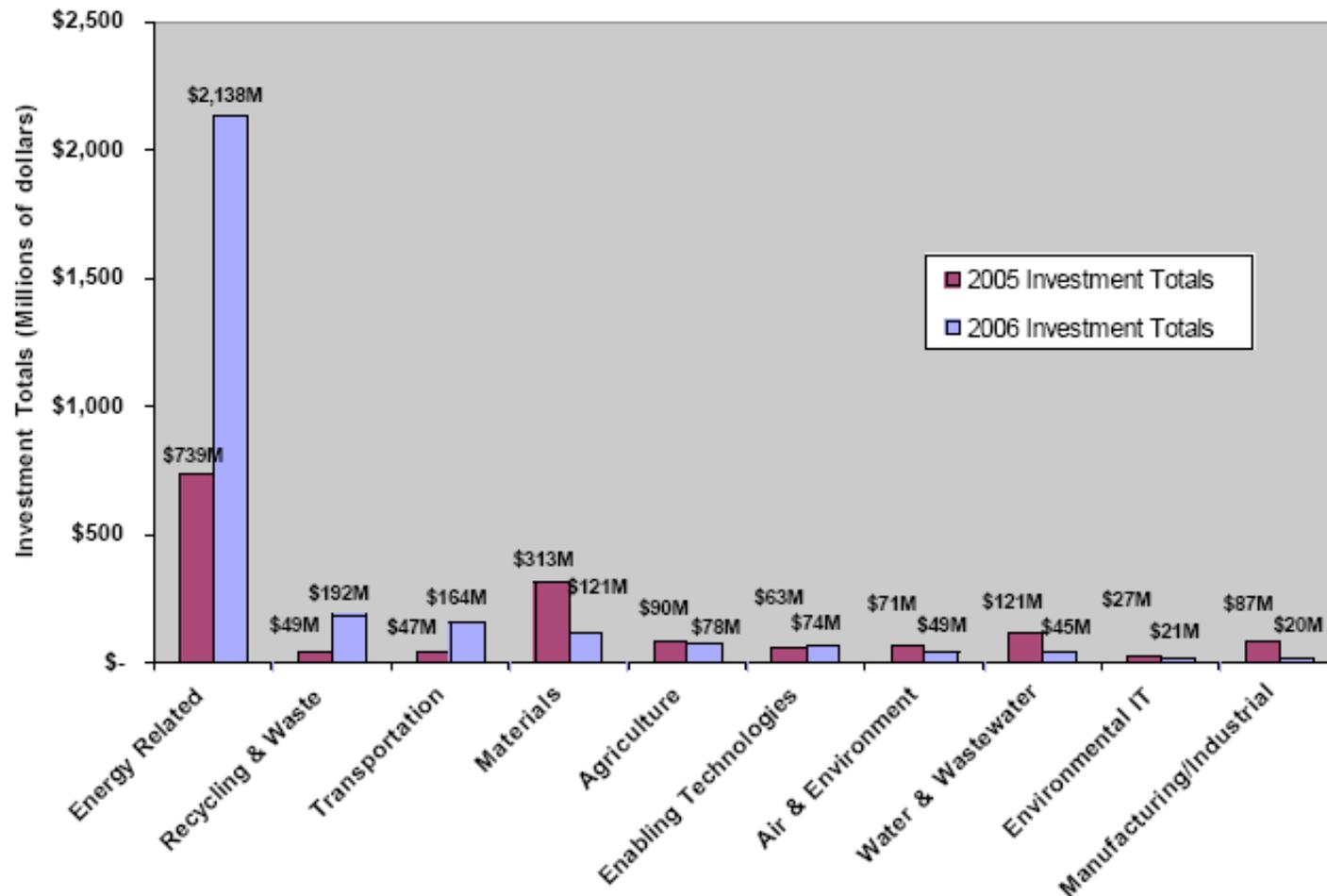


Emerging Green Economy

- Green business was a \$265 billion industry in 2005. (*Forbes*, November 2007)
- Green businesses have been growing at a rate of about 5% annually during the past three years. Two hot areas are global carbon credit trading, which doubled to \$28 billion from 2005 to 2006, and construction and services associated with buildings that meet LEED standards.
- Today, the green building industry is worth \$12 billion. Ten years ago, it was unquantifiable.
- The American Solar Energy Society estimates that renewables and energy efficiency have the potential to generate up to 40 million jobs by 2030, 1 in 4 U.S. jobs.

Cleantech Venture Investments by Sector

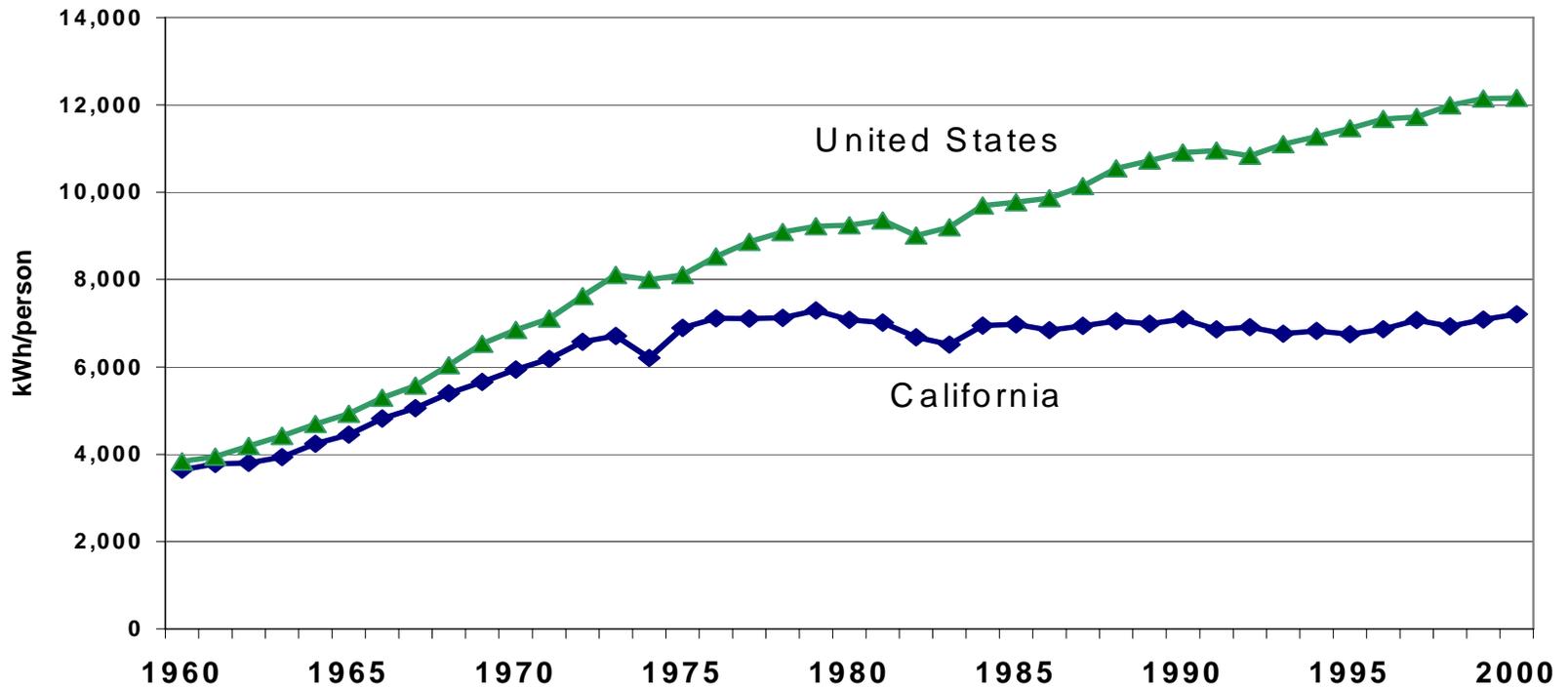
Figure 1.1 *North American Cleantech Venture Capital Investments by Industry Segment, 2005-2006 (Millions of dollars)*



California – It's Already Working



Per Capita Electricity Consumption



Draft 5.17.05 mlw

CALIFORNIA ENERGY COMMISSION

California: Energy Supply & Jobs

Scenarios (to meet 20% of current US electricity demand)	Construction, Manufacturing, Installation	O&M and Fuel Processing	Total Jobs	Ratio Over “BAU”
1. 20% RPS by 2020 85% biomass, 14% wind, 1% PV	52,533	111,136	163,669	1.89
2. 20% RPS by 2020 60% biomass, 37% wind, 3% PV	85,008	91,436	176,444	2.04
3. 20% RPS by 2020 40% biomass, 55% wind, 5% PV	111,879	76,139	188,018	2.18
4. Fossil Fuels as Usual to 2020 50% coal, 50% natural gas	22,711	63,657	86,369	1.00
5. 20% Gas Intensive by 2020 100% natural gas	22,023	61,964	83,897	0.97

- a) “Across a broad range of scenarios, the renewable energy sector generates more jobs than the fossil fuel-based energy sector per unit of energy delivered (i.e., per average megawatt).”
- b) “Supporting renewables within a comprehensive energy policy that includes EE and sustainable transportation will yield far greater employment benefits than supporting 1-2 of these sectors separately.”
- c) More effort => more jobs.

Source: Daniel Kammen et al, UC Berkeley,
Putting Renewables to Work, April 2004.

Economic/Jobs Impacts

- The State's top energy modelers found that 83,000 jobs and \$4 billion in income could be generated in California by meeting California's AB-32 goals by 2020. (UC-Berkeley)
- Leading economists from UC found that eight policies can take the state over half way to meeting the 2020 reductions. Such policies as cleaner standards for vehicles and capturing methane from landfills, can increase the Gross State Product by approximately \$60 billion, and create over 20,000 new jobs. (Climate Action Team report)

Sampling of State Climate Plan Results

State	End Date	Policy Options	Degree of Unanimity	Amount of GHG Reductions	Overall NPV Cost or Savings	Jobs Impact
AZ	2006	49	92%	<ul style="list-style-type: none"> • 2000 level by 2020 • Half 2000 level by 2040 	\$5.5 billion savings 2007-2020	285,000
CA	2008	n/a	n/a	<ul style="list-style-type: none"> • AB-32: 1990 level by 2020 	AB-32 \$4 billion savings	AB-32 83,000
CO	2007	70	87%	<ul style="list-style-type: none"> • 37% below projected emissions by 2020 	~\$3 billion savings 2007-2020	Not assessed
CT	2005	55	High	<ul style="list-style-type: none"> • 1990 level by 2010 • 10% below 1990 level by 2020 	Net Savings	Not assessed
ME	2004	54	High	<ul style="list-style-type: none"> • 1990 level by 2010 • 10% below 1990 level by 2020 	Net Savings	Not assessed
MT	2007	54	98%	<ul style="list-style-type: none"> • 1990 level by 2020 	\$78 million savings 2007-2020	Not assessed
NC	2007	56	85%	<ul style="list-style-type: none"> • 47% below projected emissions by 2020 	\$7.5 billion savings 2007-2020	44,500
NM	2006	69	97%	<ul style="list-style-type: none"> • 2000 level by 2012 • 10% below 2000 level by 2020 	\$2.2 billion savings 2007-2020	Not assessed
VT	2007	37	86%	<ul style="list-style-type: none"> • 25% below 1990 level by 2012 • 50% below 1990 level by 2028 	\$1.3 billion savings 2007-2028	Not assessed

NO LEFT TURNS



UPS 2007: RESULTS

We're talking about **more than 95,000 big square brown trucks** delivering packages every day.

The software helped the company **shave 28.5 million miles off its delivery routes**, which has resulted in **savings of roughly three million gallons of gas** and has **reduced CO2 emissions by 31,000 metric tons**.

Action Steps for New Hampshire

- *Adopt RGGI (HB 1434)*
- *Comprehensive Climate Action Plan*
- *Renewables, Decoupling, Distributed Generation*
 - Policies, rules, regulations, and incentives
- Tax Incentives for Building Energy Efficiency
- California Clean Cars
- Low Carbon Fuel Standard
- Transportation (vs. current Highway) Trust Fund
- Individual Choices; Public Education & Outreach

LAUNCHED JUNE 07



Search or browse
for company profiles and more

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A to Z | Categorized | Ranked Listing

HOME

ABOUT US

WHAT IS CLIMATE CHANGE?

ALLIES

NEWS & EVENTS

SCORECARD

COMMUNITY

JOIN US



How You Shop and Invest Changes the World

Everyone's talking about global warming, but what can you personally do about it? When you buy from companies taking responsibility for climate change, you're sending a message that climate change matters to you.

Not all companies share that sense of responsibility. But if they know you're paying attention to what they're doing (or not doing), they'll take action.

As a consumer, you have real power. **USE IT.**

Read a new essay from Climate Counts board chair **Gary Hirshberg**, now on [The Huffington Post](#).

Our Scorecard

Business has the power to change the world - and you have the power to change business. Is your favorite company **STUCK**, **STARTING**, or **STRIDING**? The race is on to address climate change. Look for our simple icons to help you support companies that reflect your values.

Download our handy pocket guide (*English, Spanish*)



Stuck



Starting



Striding



0-to-100 scale

22 criteria that objectively evaluate companies' actual voluntary efforts to reduce climate footprints through:

Reviewing/Measuring impact (22)

Reducing emissions (56)

Taking policy stance (10)

Reporting (12)

ClimateCounts

Sends a strong message that their climate footprint matters
Empowers consumers with simple steps they can take to be part of the process



Summary:

	Score	Highest Possible Score
Review	0	25
Reduce	0	55
Policy/Share	0	30
Report	0	42
TOTAL	0	100

Full Scorecard:

Section	Question/Criteria	Scoring Guide/ppts (possible points)	Score	Highest Possible Score
Review	1 GHG emissions inventory completed?	No (0); Yes, partial inventory only reviewing some of the company's emission sources (1-3, dependent on percentage of emitting sectors covered); Yes, almost comprehensive inventory (3); Yes, comprehensive inventory (5)	0	5
	2 Rough calculations or standard protocol calculations?	Rough, partial calculations (1); Generalized, but complete calculations (self-made, perhaps using a general calculator) (2); Full calculations using a standard protocol methodology (e.g., WRI) (3)	0	3
	3 Are Kyoto gases besides CO2 included?	Just inventorying CO2 emissions (0); Measuring GHG and N2O (1); All relevant, naturally-occurring gases included (2); If other Kyoto gases are not inventoried, full points can be awarded	0	2
	4 Are indirect emissions accounted for (e.g., supply chain, travel, commuting, use/disposal of products/services, investment)?	Only accounting for direct/operating average emissions (0); Including emissions from one indirect source (1); Including emissions from multiple indirect sources (2-4)	0	4
	5 Is there external, qualified third-party verification of emissions data, reductions, and reporting (where applicable)?	No (0); Yes, verification by a trade association (1); Yes, verification by a qualified, external contractor working on company's inventory (2); Yes, verification by a qualified, third-party, not involved in developing the inventory (3); Same point for verification beyond basic inventory (e.g., verification of physical reductions or reports) (4)	0	4
	6 Is the inventory an ongoing, regular process accounting for multiple years?	One time project (0); Plans for future, annual inventory work (1); At least two inventories completed (2); Multiple inventories completed (3); Multiple inventories completed and a time-series of emissions presented (i.e., emissions covering beyond the baseline and current year) (4)	0	4
Reduce	7 Has a clear goal been set?	No target (0); Loose, undefined goal (1); Defined goal specifying baseline, reduction amount/percentage, or timeframe but not all three (2-3); Goal with defined baseline, reduction amount/percentage, and timeframe (4)	0	4
	8 Strength of baseline year used for the reduction goal (keeping in mind changes in company size/composition)?	No baseline (0); Using year of inventory or 1-4 years back as baseline (1); Using a baseline 5-10 years back (2); Baseline over 10 years back (3); When scoring, consider if company has significantly changed in size or decreased during the time period or if the company has produced a year with especially high emissions, as this will affect the appropriateness of the baseline, also adjust scoring if company is new and older baselines are not available	0	3
	9 Magnitude of reduction goal (considering size of reduction and target year)?	No reduction goal (0); Near-emissions contract (1); Up to 10% reduction (2); 10-25% reduction (3); 25-50% reduction (4); Discretionary point based on timeliness of target year (i.e., large goal set for near term scores better than small reduction goal set for the future)	0	5
	10 Have a management plan and organizational structure been established for climate?	No plan established (0); General carbon/climate plan established (1); Designation of committee or responsible parties for company climate strategy (2); Designation of key responsible people and a specific plan for climate action (3); Climate strategy incorporated into overall business strategy (4); Same point for publicly available detailed plan	0	4
	11 Is there top-level support for climate change action?	No (0); Senior level executive or board members designated as responsible for climate issues (1); Clear, public articulation of company's stance on climate by CEO and/or top management (2)	0	2
	12 Has the company taken steps toward reducing resource usage (energy, materials, etc.) or emissions-reducing technology? (Projects to reduce corporate travel, investments in technology for future reduction, incentive programs; Purchase of additional, energy-efficient office, etc.; Up to 2 points per action, based on scale and depth of actions and company size, for a maximum of 8 points)	No (0); Partial reduction (e.g., significant in limited sub-sectors) (1-4); Achieved goal reductions or reductions on a timeline to meet significant target in a near year (5-6); Succeeded goal reductions (7-10) Points awarded here for absolute or intensity-based achievement	0	10
	13 Has the company achieved emissions reductions?	No (0); Partial reduction (e.g., significant in limited sub-sectors) (1-4); Achieved goal reductions or reductions on a timeline to meet significant target in a near year (5-6); Succeeded goal reductions (7-10) Points awarded here for absolute or intensity-based achievement	0	10
	14 Absolute or intensity-based reductions?	Only intensity-based (relative) reductions (0); Absolute reductions for a sub-unit of the company (1-2); All absolute reductions (3-4) When scoring, consider if company has significantly changed in size or decreased during the time period, as this will affect ease of achieving absolute reductions. Note that absolute reductions can be achieved even if a relative target was set	0	4
	15 Has the company achieved verified reductions to date (prior to current goal setting)?	No (0); Yes, reductions achieved prior to current goal setting (1-4) based on magnitude, frequency, etc.	0	4
	16 Has the company made successful efforts to reduce GHG impacts associated with the use of its products/services?	No (0); Conducting partial analysis (e.g., partial LCA, life assessment, etc.) of GHG impacts from use of products/services (1); Conducting full analysis of GHG impacts associated with use of products/services (2); Producing tangible carbon product line that reduces a reduction in carbon intensity of the traditional line of products/services (3-4)	0	4
17 Does the company work to educate its employees, trade association, and/or customers on how they can reduce individual GHG emissions through direct education programs, incentives, or philanthropic projects?	No educational effort (0); Up to 2 points for each of the following categories: Internal employee education, incentives that increase employee awareness (e.g., no travel for using mass transit), education or peer companies within trade association, and customer general public education, for a maximum of 4 points	0	4	
18 Does the company require suppliers to take climate change action or give preference to those that do?	No (0); Yes, give preference to suppliers who take action (1); Yes, require suppliers to take action (2)	0	2	
Policy/Share	19 Can the company suggest public policy that could require mandatory action by business, or has it made efforts to undermine climate change action?	No (0); Yes, on a local level or in a specialized context (1-3); Yes, on a state or national scale (4); No, but on a local level (5); Yes, on a state or regional scale (6-8); Yes, public support non-voluntary federal-level initiatives (7-10); Range of negative points awarded for depth of opposition as displayed in company materials (e.g., website, publications), via a public forum (press, speeches, advertising), and active lobbying. Note: negative points will also be awarded if company belongs to trade association seeking to undermine climate change action	0	10
	20			
Report	21 Is the company publicly reporting on emissions, risks, and actions? How is information disclosed? Company-based (e.g., on their website or annual report) or through a credible third-party program (e.g., CDP, GRI, etc.)?	No information on company climate change actions is available (0); Minimal, general info available through company report or website (1-2); Minimal/discernible available through third party (e.g., CDP) (3-4); Detailed info (emissions, reductions, goals) on company website/reports (5-6); Detailed disclosure through third party (7-8); An extra 1-2 points awarded for time series of emissions as other climate action or risk data (e.g., in GRI filings or ICRs)	0	8
	22 Are emissions broken out by facility, business unit, country of operations, or other meaningful subcategory?	Only total emissions or one lumped number are presented (0); Some sub-unit emissions broken out (1); Emissions clearly listed by company-appropriate sub-units (2)	0	2
TOTAL			0	100

Identify and quantify emissions (22)

Set goals and establish internal management (11)

Achieve reductions (absolute, relative) (21)





ClimateCounts

APPAREL/ACCESSORIES Score

● Nike	73
● Gap Inc.	39
● Liz Claiborne	15
● Limited Brands	5
● VF Corporation	2
● Levi Strauss	1
● Jones Apparel Group	0

FOOD SERVICES Score

● Starbucks	48
● McDonald's	22
● Yum! Brands	1
● Burger King	0
● Darden Restaurants	0
● Wendy's International	0

BEVERAGES - BEER Score

● SABMiller	48
● Anheuser-Busch	29
● Molson Coors Brewing	20

MEDIA Score

● General Electric*	61
● News Corporation	57
● Disney	24
● Time Warner	10
● Viacom	3
● CBS	0

SHIPPING Score

● Deutsche Post/DHL	45
● US Postal Service	43
● UPS	39
● FedEx	28

HOUSEHOLD PRODUCTS Score

● Procter & Gamble	53
● L'Oreal	45
● Kimberly-Clark	41
● Colgate-Palmolive	40
● Avon	11
● Clorox	1

FOOD PRODUCTS Score

● Unilever	71
● Stonyfield Farm	63
● The Coca-Cola Company	57
● Groupe Danone	50
● Kraft Foods	43
● Nestle	42
● General Mills	37
● PepsiCo	28
● Kellogg	24
● ConAgra Foods	6
● Sara Lee	2

ELECTRONICS Score

● Canon	77
● IBM	70
● Toshiba	66
● Motorola	60
● Hewlett-Packard	59
● Sony	51
● Dell	41
● Hitachi	36
● Siemens*	34
● Samsung	33
● Nokia	29
● Apple	2

INTERNET/SOFTWARE Score

● Yahoo!	36
● Microsoft	31
● Google	17
● eBay	2
● Amazon.com	0

Key to Climate Counts Scores



Stuck Starting Striding

*This company is a conglomerate, with significant holdings in this sector as well as others. It is presented here with some of its major competitors in one of the initial sectors investigated by Climate Counts. Scores based on public information available through mid May 2007.

CHICAGO BUSINESS

— POWERED BY CRAIN'S —

- January 26, 2008: “Kraft, Sara Lee make play for green crowd”
- Piece focused on food products sector
- Audra Karalius of Sara Lee (2 out of 100 points): “company is working to improve its rating”

STRIDING

71 UNILEVER

Headquarters: London

Brands include: Ben & Jerry's, Bertolli, Country Crock, Hellman's, Knorr, Lipton, Slim-Fast, Wish-Bone



57 COCA-COLA

Headquarters: Atlanta

Brands include: A&W, Coca-Cola, Dasani, Dr Pepper, Fresca, Hi-C, Minute Maid, Powerade, Sprite

50 GROUP DANONE

Headquarters: Paris

Brands include: Dannon, Evian, Wahaha

63 STONYFIELD FARM

Headquarters: Londonderry, N.H.

Brands include: Brown Cow, Stony Yogurt on a Mission



STARTING



42 NESTLE

Headquarters: Vevey, Switzerland

Brands include: Carnation, Coffee-mate, Crunch, Edy's, Juicy Juice, KitKat, Lean Cuisine, Nesquik, PowerBar, Stouffer's

37 GENERAL MILLS

Headquarters: Golden Valley, Minn.

Brands include: Betty Crocker, Bisquick, Cheerios, Green Giant, Pillsbury, Progresso, Wheaties, Yoplait

26 PEPSICO

Headquarters: Purchase, N.Y.

Brands include: Frito Lay, Gatorade, Mountain Dew, Pepsi, Quaker Oats, Sierra Mist, Tropicana



43 KRAFT

Headquarters: Northfield

Brands include: Chips Ahoy, Kraft Macaroni and Cheese, Maxwell House, Miracle Whip, Oreo, Oscar Mayer, Velveeta, Wheat Thins

24 KELLOGG

Headquarters: Battle Creek, Mich.

Brands include: Cheez-it, Eggo, Keebler, Nutri-Grain, Pop-Tarts, Rice Krispies, Special K

STUCK

6 CONAGRA FOODS

Headquarters: Omaha, Neb.

Brands include: Chef Boyardee, Healthy Choice, Orville Redenbacher's, Pam, Peter Pan, Swiss Miss



2 SARA LEE

Headquarters: Downers Grove

Brands include: Ball Park, Best's Kosher, Douwe Egberts, Emeril, Hillshire Farm, Jimmy Dean, Senseo, Sara Lee

80% by 2050!



Our “World Cup”

Supporting Slides

- California Policies
- CA Financial Incentives
- Washington State
- Arizona
- New Mexico

California RE/EE Policies & Regs (1)

- Appliance / Equipment Efficiency Standards
 - Appliance Efficiency Regulations
- Building Energy Code
 - California State Energy Code
- Contractor Licensing
 - Solar Contractor Licensing
- Energy Standards for Public Buildings
 - Green Building Action Plan for State Facilities
- Generation Disclosure
 - Power Source Disclosure Program
- Interconnection
 - Interconnection Standards

California RE/EE Policies & Regs (2)

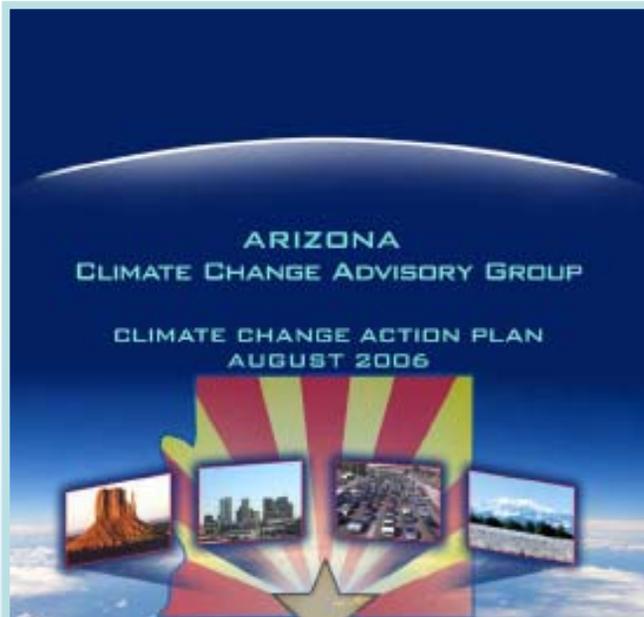
- Net Metering
 - Net Metering Regulations
- Public Benefits Fund
 - Public Benefits Fund for RE & EE
- Renewable Portfolio Standard
 - Renewable Portfolio Standard
- Electricity Supply
 - EE/RE Loading Order Preference
- Solar Access Law/Guideline
 - Solar Easement and the Solar Shade Control Act
 - Solar Rights Act
- Alternative Fuel and Vehicle Policies
 - California LEV II Clean Car (“Pavley”) Emissions Standards
 - 30% lower GHG emissions by 2016
 - Low-Carbon Fuel Standard
 - 10% reduction in life-cycle carbon intensity of fuels by 2020

California RE/EE Financial Incentives

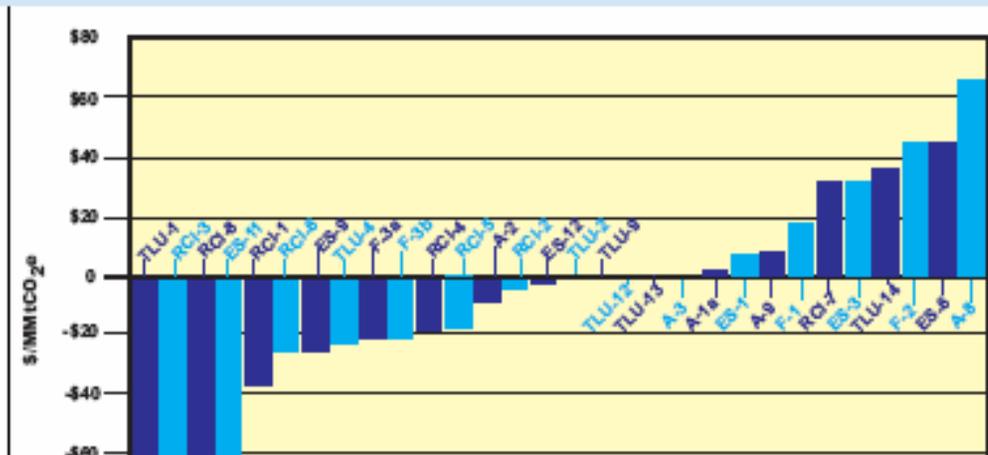
- Personal Tax Deduction
 - Tax Deduction for Interest on Loans for Energy Efficiency
- Production Incentive
 - Supplemental Energy Payments (e.g., to RE, CHP, etc.)
- Property Tax Exemption
 - Property Tax Exemption for Solar Systems
- State Loan Program
 - Agriculture and Food Processing Energy Loans
 - Energy Efficiency Financing Program
- State Rebate Program
 - California Solar Initiative - Photovoltaics
- Incentives
 - California Solar Initiative - Pilot Solar Water Heating Program
 - CEC New Solar Homes Partnership
 - Emerging Renewables Program
 - Self-Generation Incentive Program

Washington State's Clean Energy Industry

- 241 entities; more than \$2.1 billion in 2004 revenues
 - Larger than the state's logging industry (\$1.9 billion) and coffee/espresso shop industry (\$1.7 billion)
- 8,400 jobs (2004); average salary \$60,000
 - Job growth from 3,800 jobs in 1998; four-fold in last decade
 - Expect 25,000 clean energy jobs by 2020
- Puget Sound clean technology firms grew by 24% (1997-2001) compared to 9% nationally
- 64% greater concentration of clean tech jobs in Washington State than the U.S. average
- Clean energy industries include:
 - Energy efficiency
 - Renewable energy (including solar, wind, fuel cell, geothermal, and biomass)
 - Smart energy (using technological advances to improve all steps of the energy production to end-consumption process).



CCAG Recommended Policy Options, by Quantified Cost Per Ton GHG Removed
 Cost savings are shown below the axis. Net costs are shown above the axis.



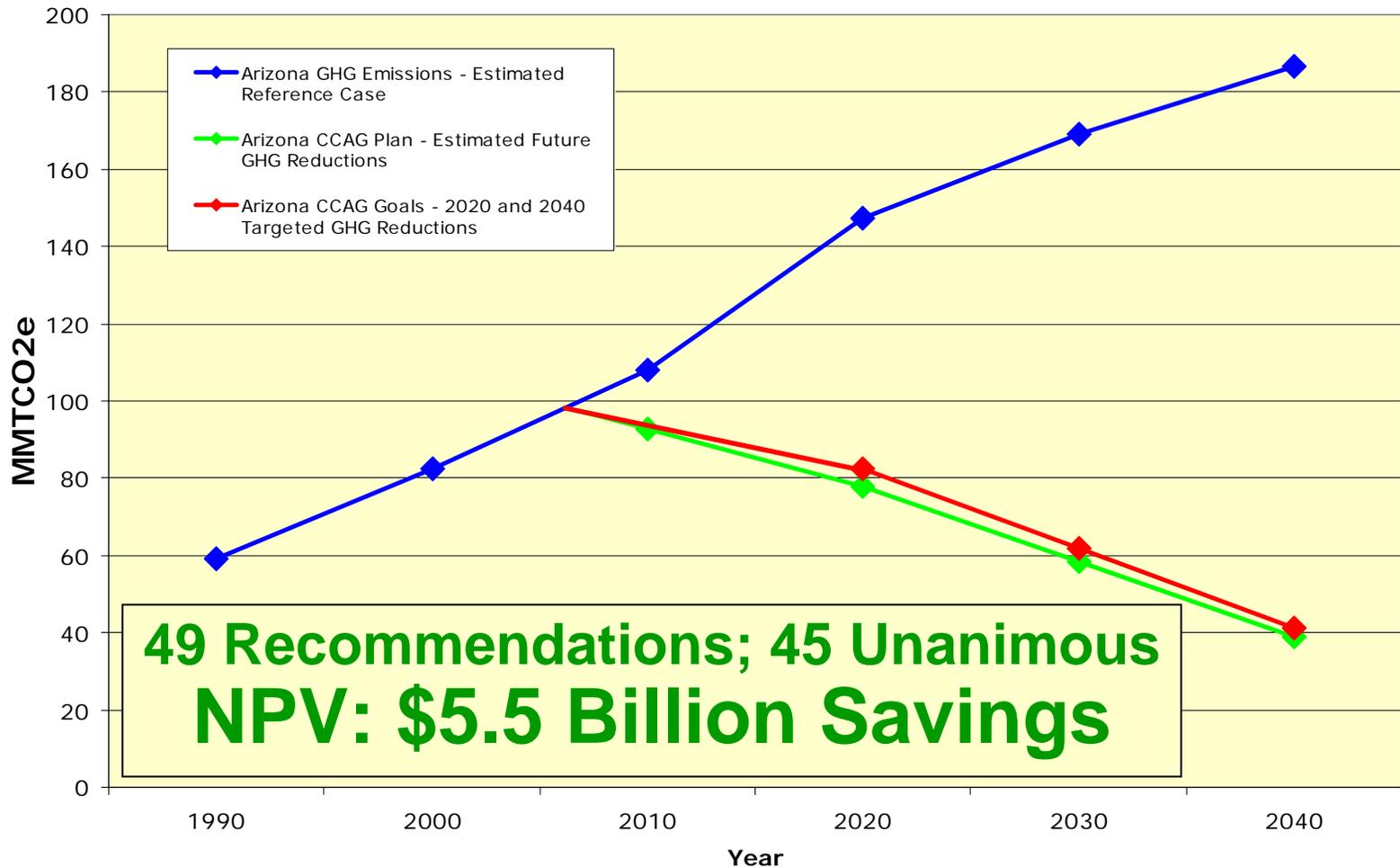
Total of all CCAG Options with Adjustments for Overlap (Detailed data may be found in the Tables presented in Chapters 4-8 and the Appendix)	2010 Annual GHG Reduction (MMtCO ₂ e)	2020 Annual GHG Reduction (MMtCO ₂ e)	2007-2020 Cumulative Reduction (MMtCO ₂ e)
	15.4	69.4	485.4 ¹⁵

+285,000 jobs

The Center for Climate Strategies (CCS) has calculated overall net economic cost savings from the CCAG's policy option recommendations of more than \$5.5 billion from 2007-2020. The CCS also has calculated that the average cost for each ton of GHGs removed would be -\$12.74, meaning that there would be a net economic cost savings of \$12.74 for each ton of GHGs removed.¹⁵

Arizona – Climate Plan Results

AZ CCAG Goals vs. Estimated CCAG Plan Results



Similar Results in Other States...



**NEW MEXICO
CLIMATE CHANGE
ADVISORY GROUP**

FINAL REPORT
December 2006

- **69 Recommendations;
67 Unanimous**
- **NPV: \$2.1 Billion Savings**
- **Reductions exceeded
Governor's goals.**