

In early 2020, the Tennessee Department of Environment and Conservation (TDEC), Office of Policy and Sustainable Practices (OPSP) distributed a survey to 612 industry representatives throughout Tennessee. Survey recipients were primarily comprised of Tennessee Green Star Partners, the top 100 industries on the Toxic Release Inventory list, and food/beverage manufacturers. The goal of the survey was to better understand the landscape of environmental management practices, sustainability, pollution prevention activities, and associated challenges and opportunities in Tennessee. OPSP would like to thank everyone that responded to the 2020 Industry Survey. A total of 116 individuals (20%) responded to the industry survey, representing a diverse mix of industry types, facility sizes, and geographic locations throughout Tennessee.

The 2020 Industry Survey – Executive Summary provides significant insights on the current landscape of environmental management, sustainability, and pollution prevention practices at industry in Tennessee. Survey data and associated findings will enable OPSP to offer substantive roundtable meetings that address issues identified as impacting industry. Roundtable meetings will be used to further scope OPSP’s design and content of summer workshops and trainings, webinars, and other resources developed for Tennessee’s industry community. Additionally, the information contained in the Executive Summary also provides Tennessee’s industry leaders with an overview of the current state of environmental management, sustainability, and pollution prevention practices in Tennessee. Smart environmental choices can give organizations competitive advantages.

If you have questions or interest in additional discussion regarding survey results, please respond by e-mail or call us:

Vaughn Cassidy
Vaughn.Cassidy@tn.gov
p. 731-512-1343

Kathy Glapa
Kathy.Glapa@tn.gov
p. 615-253-8780

Caleb Powell
Caleb.Powell@tn.gov
p. 615-532-0097

Matthew Taylor
Matthew.K.Taylor@tn.gov
p. 615-979-2449

The survey results provide an encouraging snapshot of the current state of environmental management, sustainability, and pollution prevention practices within Tennessee industry. The following are the primary takeaways from the 2020 Industry Survey and will be used to inform discussion during the roundtable meetings:

- Over 30% of respondents have an ISO 14001 certified Environmental Management System. 15% have an EMS that conforms to the ISO standards but is not certified. Almost half, or 46%, have none.
- 12% of respondents are designated (by a third party) or self-designated as a Zero Waste to Landfill (ZWTL) facility. ZWTL still has no official or ubiquitous definition; however, it is generally accepted to be at least 95% of discards are being reused, recycled or otherwise not

landfilled. 88% of survey respondents are not ZWTL but nearly all have plans to achieve this within 5 years. Common obstacles to this goal vary widely but general themes are; vendor capabilities, lack of monetary commitment, and issues with materials substitutions. Most often mentioned is products that require certain non-recyclable materials and challenges with finding ZWTL management solutions.

- Most respondents, 66%, recycle within the state but also utilize a variety of options. Tennessee borders more states than any other in the country, so in many instances out of state recycling options may still represent regional recycling solutions. Specialized items often require corporate nation-wide accounts which limit local options.
- Liquid wastes are treated with a variety of options with well over 50% of respondents using other options than specified in the survey. 23% landfill their liquid wastes while 8% use land application and only 1% have animal feed options.
- Over 70% of respondents have heard of the [Tennessee Materials Marketplace](#), our collaborative platform to facilitate the reuse of materials. Many of the respondents would like assistance with recycling certain discarded materials. The [Tennessee Materials Marketplace](#) is a major tool for this.
- 43% of respondents have non-hazardous byproducts that could have other uses. Impediments to this are a lack of recycling vendors and prohibitive costs for processing.
- 39% would like assistance with finding a beneficial end-use for material discards. Lack of partners, low quantities, and materials unique to manufacturing processes were identified as the major impediments to beneficial end-use. The Office of Policy and Sustainable Practices will be in direct contact with each of these respondents to offer further assistance.
- Only 30% participate in any demand response programs for energy use curtailment and management during peak energy use times.
- The most popular energy reduction project was lighting upgrades with 91% of respondents identifying this as a strategy pursued. Low impact design and energy efficient equipment and practices are implemented by over 50%.
- The [Tennessee 3 Star Industrial Assessment Center](#) (IAC) offers very in-depth energy audits at no cost. Our office is referring those respondents that are interested to the IAC program.
- Over 80% of respondents report toxic releases to the U.S. Environmental Protection Agency.
- For over 50% of respondents the primary barrier to pollution reduction for your TRI reportable chemicals is that there are no known substitutes. An encouraging statistic is that over 40% have attempted reductions and substitutions to a point that concern for product quality and economic feasibility are the main barriers.
- 25% of respondents are interested in becoming [TN Green Star Partnership](#) industries. Our leadership program for industry includes General Motors, Delta Faucet, Nissan and many other industry and sustainability leaders throughout the state. Our staff will be reaching out to interested facilities in the near future.

- 60% of respondents are interested in participating in collaborative projects which will include materials, chemicals and energy management challenges. This group will be kept informed of opportunities in the future.

Please feel free to share the results of this survey with your employees, suppliers, or customers. The Office Policy and Sustainable Practices appreciates your valuable time and efforts toward making Tennessee a more sustainable state.

Thank you.