



**American  
Forest & Paper  
Association**

# ***CalRecycle Manufacturers Challenge Workshop***

Tuesday, January 5, 2016

Sacramento, CA



**BETTER PRACTICES  
BETTER PLANET 2020**  
Continuing AF&PA's Commitment to Sustainability

# *About AF&PA*

- Advances a sustainable pulp, paper, packaging and wood products manufacturing industry
- Fact-based public policy and marketplace advocacy
- Member companies produce 75% of U.S. pulp, paper, paper-based packaging and wood products.

# *The Paper Industry in California*

- Over 21,000 employees
- 14 mills and over 470 converting facilities
- 6 recycling facilities
- \$1.6 billion in annual payroll
- \$9.7 billion in products
- \$536 million in estimated state and local taxes paid

# AF&PA's 2020 Sustainability Goals

1. Paper Recovery  Exceed 70%
2. Energy Efficiency  Increase purchased energy efficiency by at least 10%
3. GHG Emissions  Reduce intensity by at least 15%
4. Forestry  Increase certified fiber procurement
5. Safety  Reduce incidence rate by 25%
6. Water  Reduce use in mills by 12%

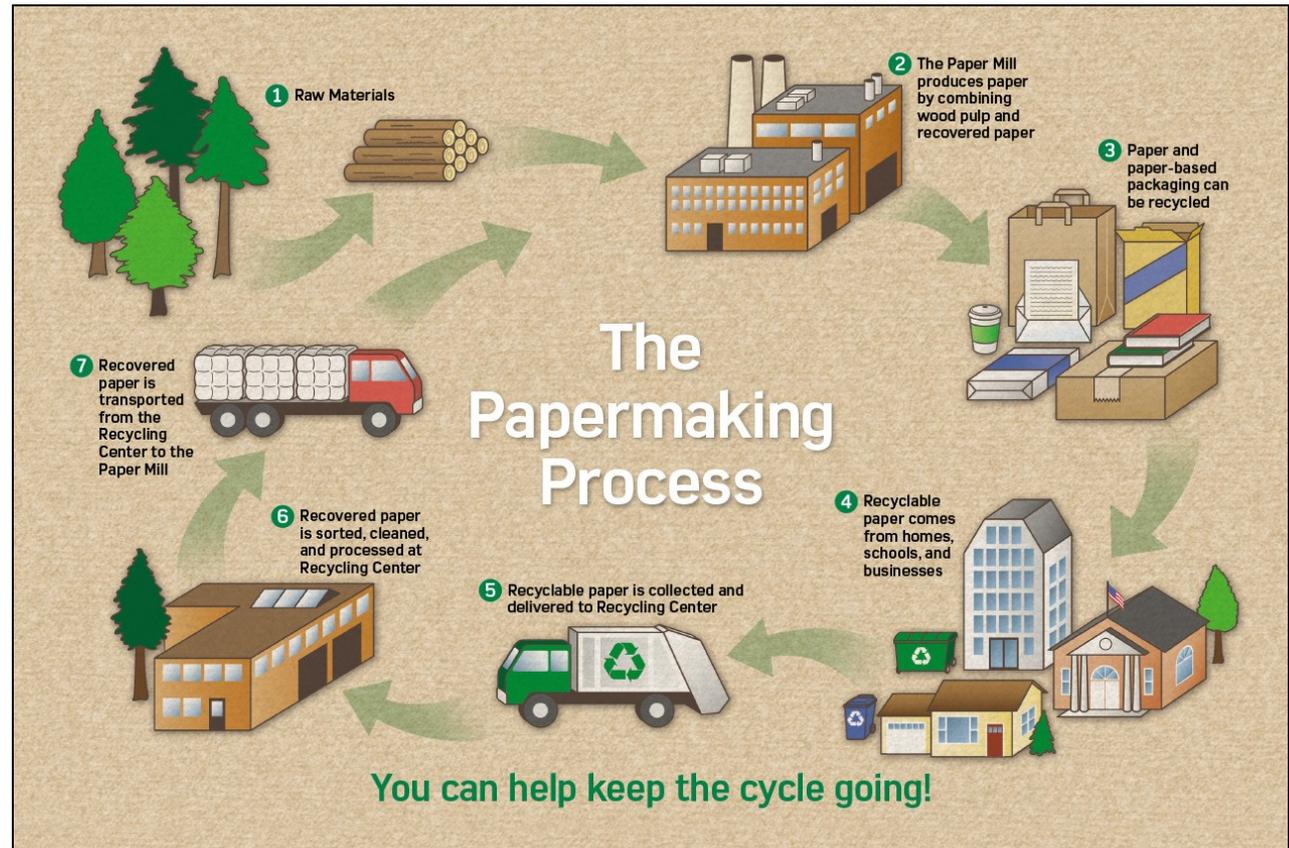


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# Sustainable Manufacturing of Paper

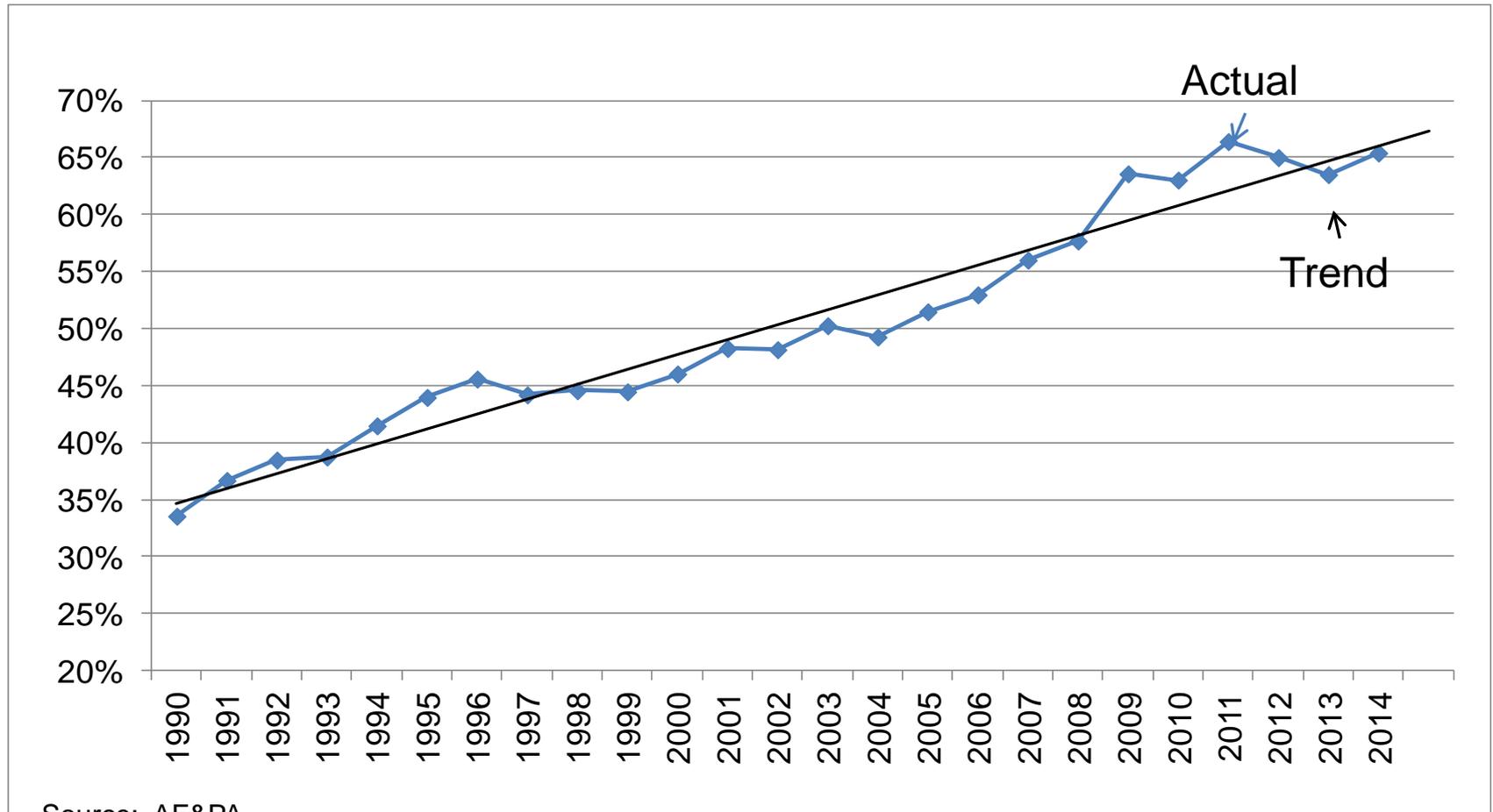
Paper and paper-based packaging are...

- Derived from sustainably managed forests
- Renewable
- Recyclable



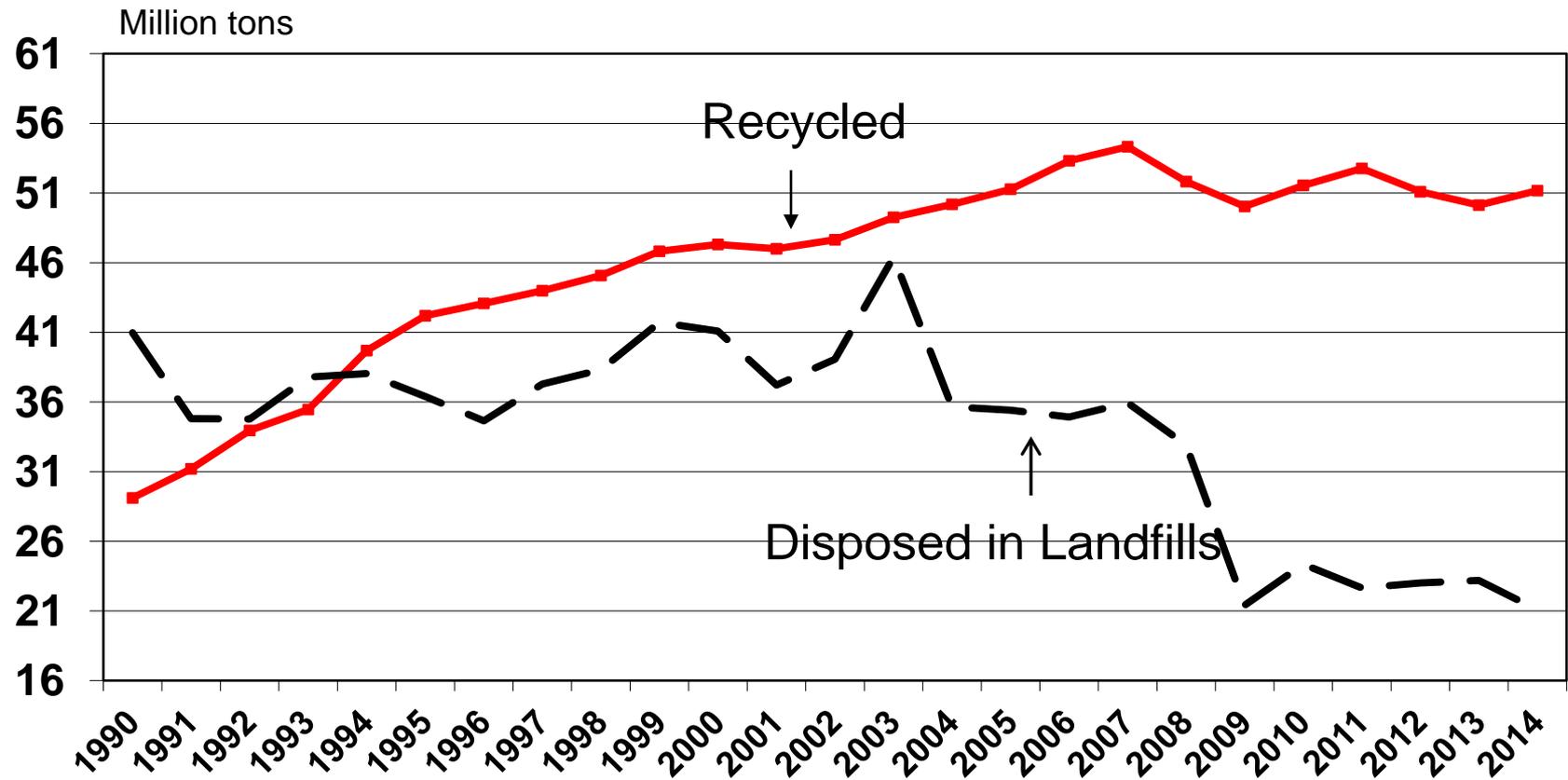
# Paper Recycling: A True Environmental Success Story

## U.S. Paper Recovery Rate 1990-2014



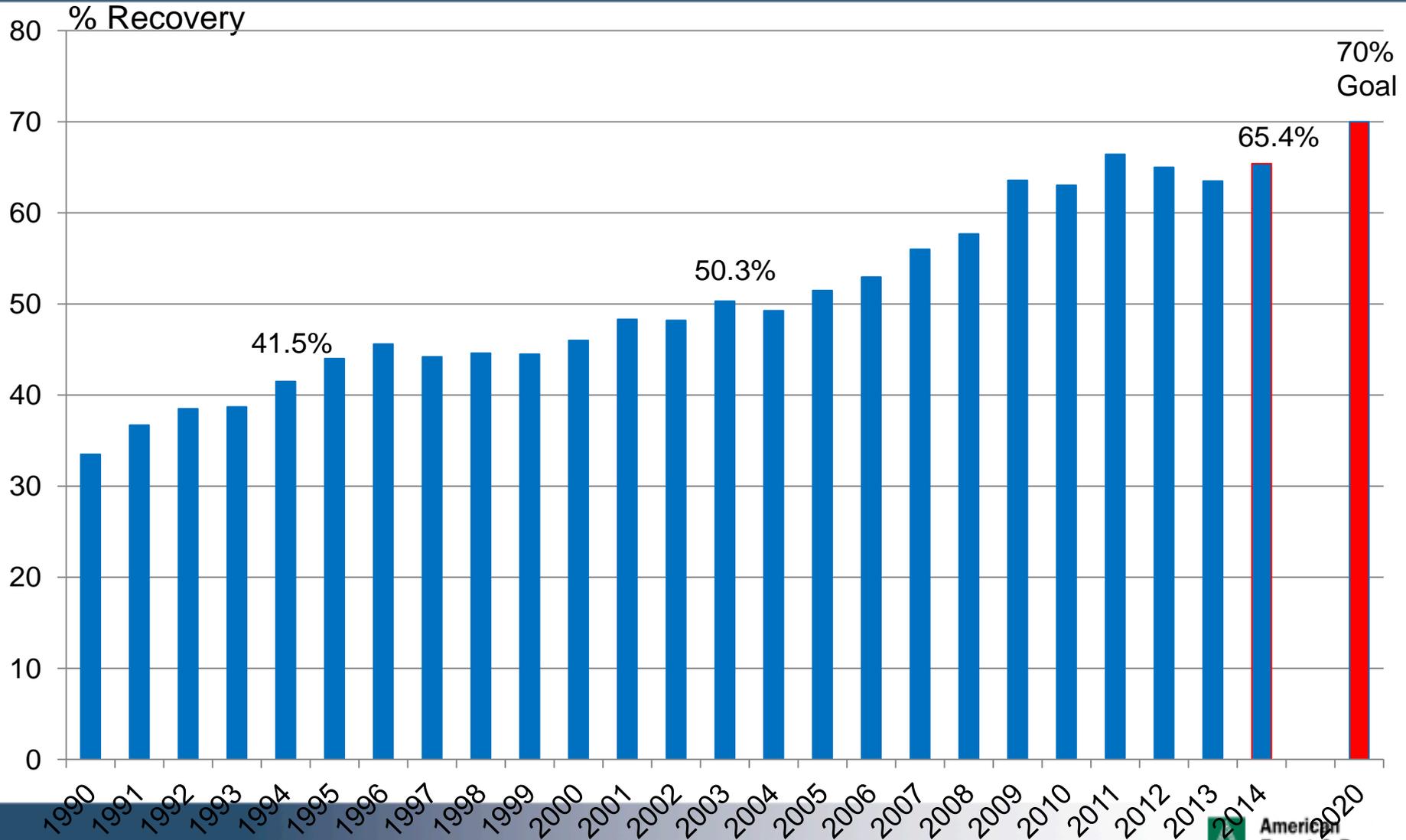
Source: AF&PA

# Paper Recovered for Recycling Vs. Disposed of in Landfills



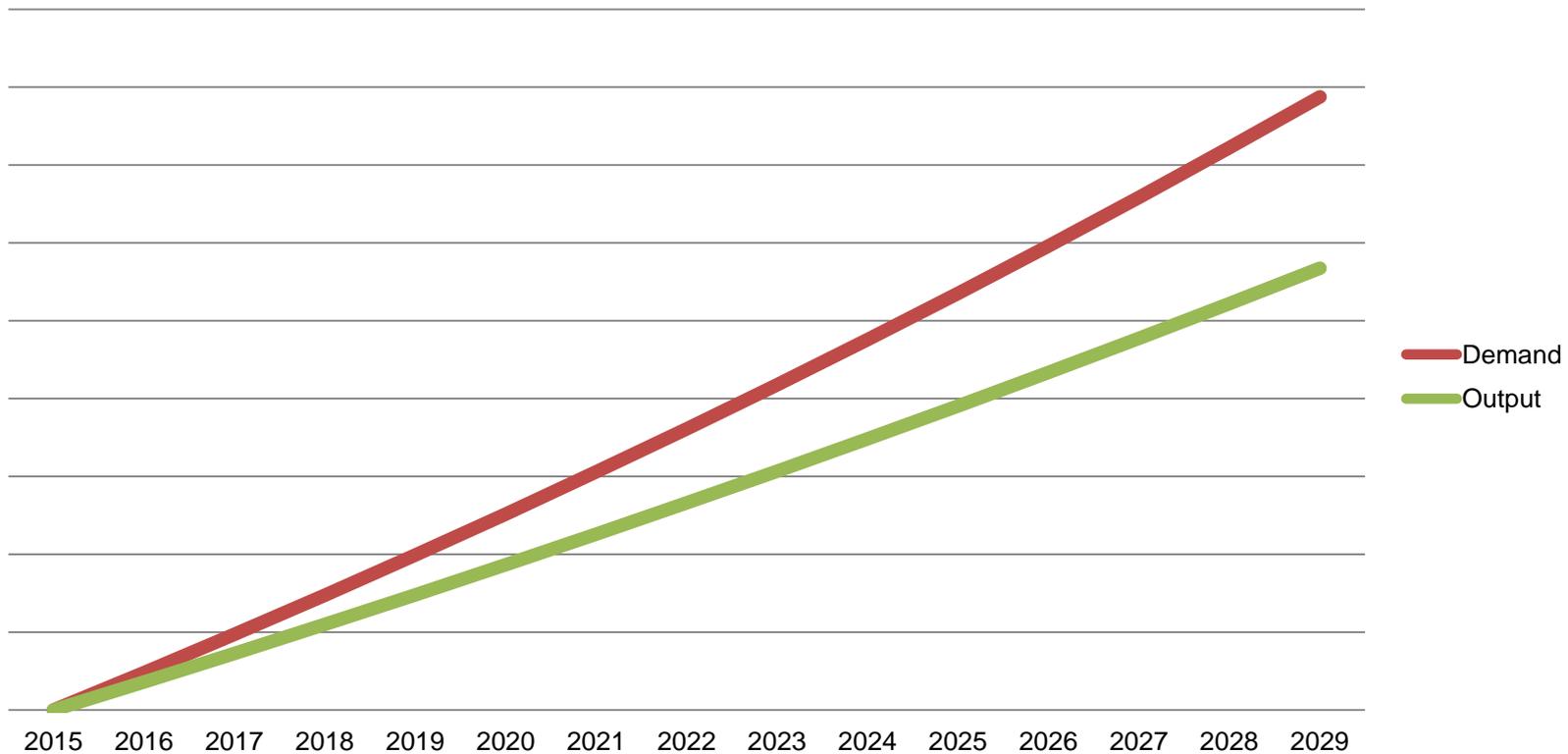
Source: American Forest & Paper Association

# U.S. Paper Recovery Rate



# Global Demand for Recovered Paper (2015-2029)

## Global Recovered Fiber Demand vs. Paper and Paperboard Output



Source: RISI

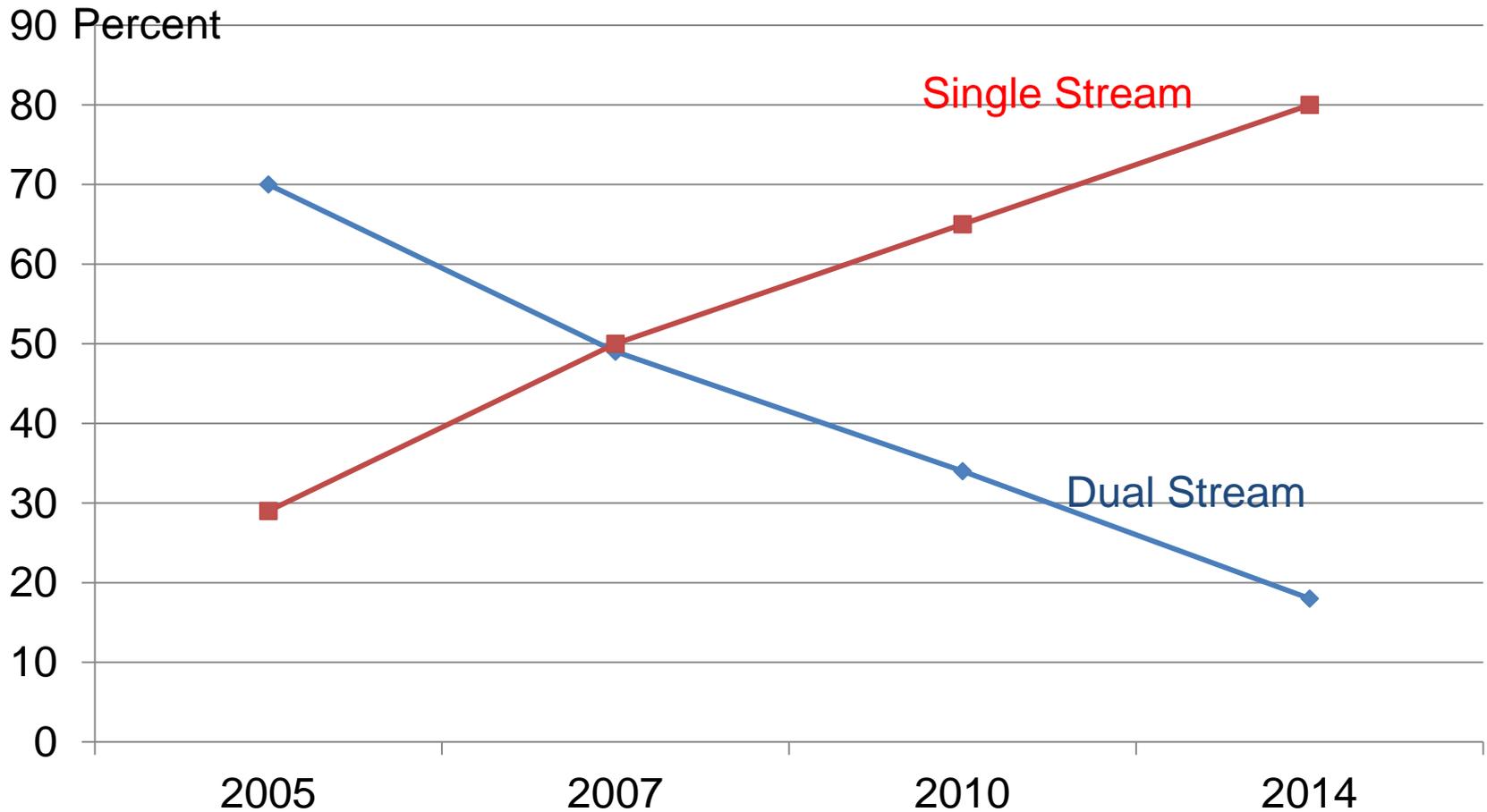
# *Achieving the Goal of Recovery*

- Grades
  - Paperboard
  - Containerboard & Multi-Wall Bags
  - Office papers
- Sources
  - Office buildings
  - Smaller commercial/institutional
  - Exurban communities
- New initiatives
- Education

# *AF&PA Partnerships*

- Foodservice Packaging Institute
- Paper Shipping Sack Manufacturers' Association
- The Recycling Partnership

# Dual Vs. Single Stream Collection



Source: AF&PA Community Access Survey

# *Recovered Fiber Markets*

- Complex, dynamic, efficient
- Global demand
- Collection commitment by many parties
  - Municipalities
  - Paper manufacturers
  - Recycling companies
  - Millions of Americans
- Not served by regulations that restrict market-based collection, distribution or use

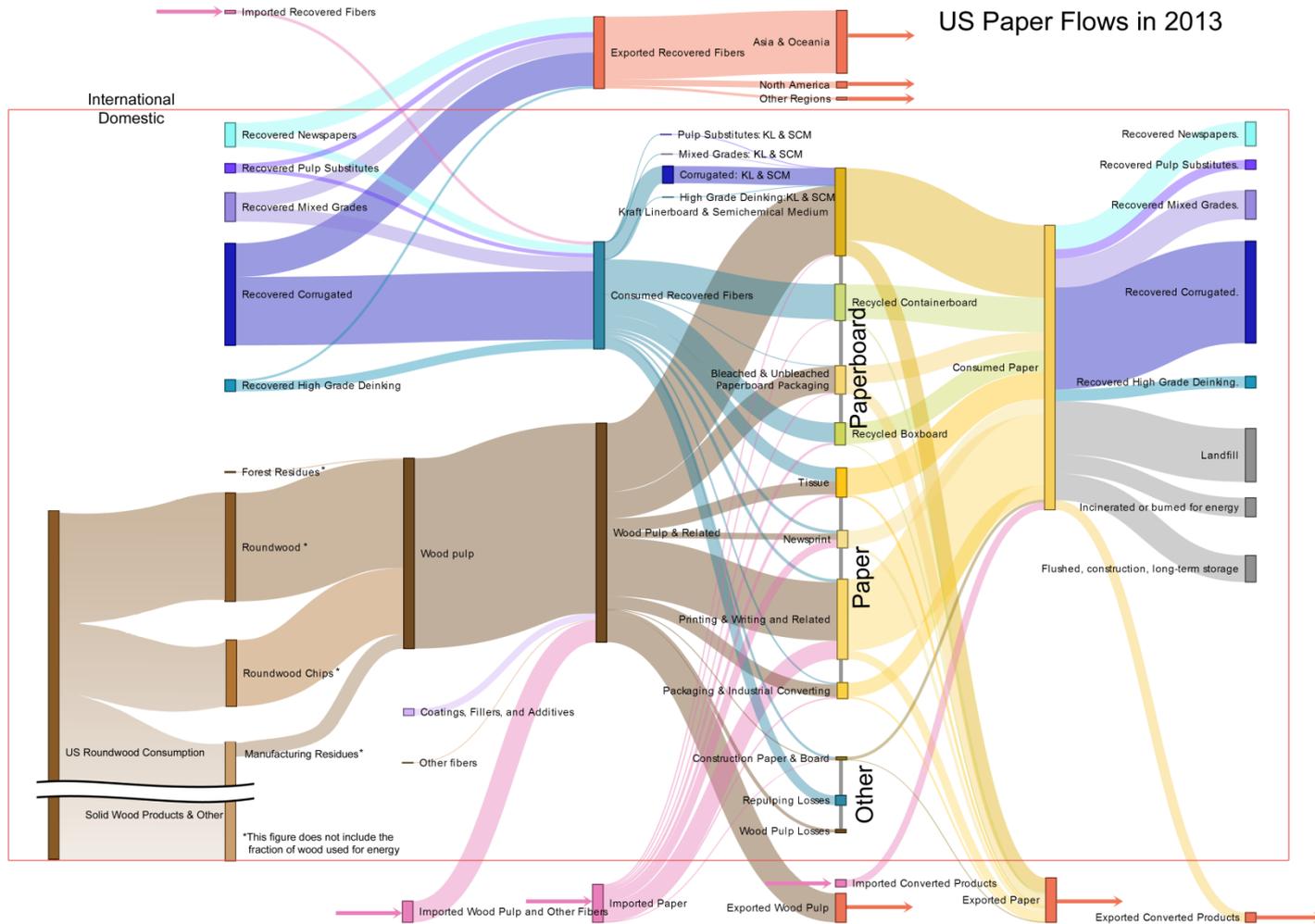
# *Government Policy Challenges*

- Extended Producer Responsibility
- Recycled content mandates
- Product taxes and bans
- Mixed-waste processing systems

# *Extended Producer Responsibility*

- AF&PA opposes for paper & packaging
  - Markets for recovered paper are developed
  - Broad consumer access to paper recycling
  - Paper is recycled at a high rate
- Will not increase paper recovery

# Recycled Content Mandates



Fiber Stage:

Sources of Fiber

Fiber Utilization in Products

End-of-Life Fiber Destinations

# Promoting Increased Paper Recovery

The screenshot shows the homepage of paperrecycles.org. At the top left is the logo. To the right are search and subscribe buttons. A navigation bar includes links for About, Recycling Resources, Sustainability, Recycling Awards, News, and Statistics. The main content area features a large graphic of a recycling symbol made of paper and a headline: "Paper Recovery for Recycling ...has exceeded 60% each year since 2009 in the U.S." with a "Learn More" button.

The infographic is titled "THINK BEFORE YOU SHRED!" and includes the sub-headline "Shred only documents with sensitive information!". It explains that shredding shortens paper fibers, which helps keep fibers long, strong, and ready to be made into new paper, thereby improving recycling. It lists various documents to be shredded: Mail, Folders, Office/Printed Copies, Greeting Cards, Magazines, Employee Pay Stubs, Bank Statements, Investment Transactions, Pre-approved Credit Card Applications, Medical Records, and Tax Forms. It also lists "Sole or Credit Card Numbers". The infographic shows a green recycling bin and a shredder, with a "Thanks!" message and the American Forest & Paper Association logo at the bottom.

The infographic is titled "RECYCLING IN THE WORKPLACE" with the slogan "Ready. Set. Go!". It features a large graphic of a recycling symbol made of paper. At the bottom, it says "Tips and perspectives from the American Forest & Paper Association".

The screenshot shows the Facebook page for Paper Recycling, a Non-Profit Organization in Washington, District of Columbia. The page has 2,904 likes. A post from paperrecycles.org is visible, titled "Paper Recycling" and dated 4 hours ago. The post text reads: "Schools are a great place for kids (and parents!) to learn the fundamentals of paper recycling, a great life-long habit. Click here to read case studies of some great school recycling programs: http://www.paperrecycles.org/case\_study/2011/school/index.html". Below this, it lists "paperrecycles.org - Paper Industry Association Council - Paper & the Environment" with the website www.paperrecycles.org. It also provides location information: "Location: Purdy, MO Students: 675 Amount of paper recovered for recycling in 2010: 52,000 pounds Amount of paper recovered per student: 77 pounds".

The logo for "THE RECYCLING PARTNERSHIP" features a stylized circular graphic composed of green and blue lines, resembling a recycling symbol or a globe. Below the graphic, the text "THE RECYCLING PARTNERSHIP" is written in a bold, blue, sans-serif font.

# ***“Best Practices” for Sustaining Recovered Paper Markets***

- Free marketplace
  - Collection
  - Distribution
  - Utilization
- System designed to meet end user requirements