How is the Paper Industry Addressing Post-Consumer Recycled Content?

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About AF&PA

• Advances a sustainable pulp, paper, packaging and wood products manufacturing industry.

• Fact-based public policy and marketplace advocacy.

• Represents 83% of the U.S. pulp, paper, paper-based packaging and tissue capacity.
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%
AF&PA Recovered Fiber Program

Working toward industry’s goal to exceed 70% recovery by 2020:

- Educate & influence federal, state & local policymakers.
- Raise awareness about benefits of paper recycling & recovery success.
- Partner with others to increase collection of mill-quality recovered fiber.
- Provide tools & resources to help establish or improve paper recovery programs.
No Program Addressing Only Post-Consumer Recycled Content

Rationale:
• AF&PA Recycling Policy.
• Success of voluntary paper recovery markets.
• Mills make fiber consumption decisions.
• Alignment with major certification bodies.
AF&PA Recycling Policy

- Recovered fiber markets are complex, efficient and dynamic and are not served by regulations or prescriptive approaches to specify the use of recycled fibers or dictate what type of recovered fiber is used in products.

- The distinction between pre- and post-consumer content is not meaningful and should not be used in government policies.

- AF&PA opposes recycled content mandates – the focus should be on increasing paper recovery, not content mandates.
Success of Voluntary Paper Recovery Markets

U.S. Paper Recovery Rate 1990-2017

Source: American Forest & Paper Association
Success of Voluntary Paper Recovery Markets (cont’d)

U.S. Paper Recycled vs. Landfilled 1990-2017

Million tons

Recycled

Disposed in Landfills

Source: American Forest & Paper Association
Success of Voluntary Paper Recovery Markets (cont’d)


Mill Fiber Consumption

- Marketplace issue – AF&PA does not interject.
- Approx. 80% of U.S. mills consume recovered paper.
- Mills select fiber based on:
  - Availability
  - Cost
  - Quality
  - Functionality
  - Product performance
  - Aesthetics
  - Customer demand
Aligned with Major Certification Bodies – Recognize all Recovered Fiber

• Both certification bodies count pre- and post-consumer materials toward recycled content in product declarations.
Looking Ahead

• U.S. paper manufacturers are increasing their consumption of recovered fiber
  • 2018: +2.2% or 684,000 tons
• New capacity is coming online designed to use recovered fiber
  • Growth in Packaging and Tissue
• New investments in materials processing
• EPA – America Recycles Day
  • Enhancing the domestic recycling industry through education, investments, collaboration, measurement
The composition of recovered paper is changing:
• Mixed Paper and News grades are declining
• Corrugated is increasing
• The recovery rate of paper is high
  • Recovery rate has exceeded 60% since 2009

• The recovered fiber mix is becoming more “Brown”
• The Post-consumer distinction is not meaningful
Thank You!

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