The Future of Paper Recycling

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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

• Member companies produce 75% of U.S. pulp, paper, paper-based packaging and wood products.
Containerboard/Corrugated
Kraft/Multi-wall Packaging
Paperboard – Bleached
Bleached Paperboard – Liquid Packaging
Paperboard – Recycled
Printing/Writing Papers
Tissue
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 Use  Reduce use in mills by 12%
Sustainable Manufacturing of Paper

Paper and paper-based packaging are...
- Derived from sustainably managed forests
- Renewable
- Recyclable
Historical Paper Recovery Trend

U.S. Paper Recovery Rate 1990-2014

Actual

Trend

Source: AF&PA
Challenges to Increasing Paper Recovery

• Marketplace
  • Less newsprint & office/copy paper
  • Recycling collection systems
Global Demand for Recovered Paper (2015-2029)

Global Recovered Fiber Demand vs. Paper and Paperboard Output

Source: RISI
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 or use
Government Policy Challenges

• Extended Producer Responsibility
• Recycled content mandates
• Product fees 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
"One-Bin Collection"
Opportunities for Increased Recovery

• Grades
  • Paperboard boxes (cereal, tissue, etc.)
  • Corrugated boxes
  • Office/copy papers

• Sources
  • Office buildings
  • Homes
  • Schools

• New initiatives
Consumer Education

Improving Paper Recycling
“Best Practices” for Sustaining Recovered Paper Markets

• Free marketplace
  • Collection
  • Utilization

• System designed to meet end user requirements