AF&PA represents the diversity of pulp, paper, packaging, tissue and wood products manufacturers who provide items that are essential to everyday life—including education, communications, hygiene, food storage, product protection, and shelter and homes.

At the beginning of 2018, we determined that trade, transportation efficiency, regulatory reform and paper-product policies were AF&PA’s top advocacy priorities for the year. In addition to advancing the industry through our advocacy, we engaged our members and stakeholders; developed and published research, data, analyses and reports; spoke on behalf of our membership; and focused on staff development.

This past year also marked AF&PA’s 25th anniversary. In 1993, our association was formed by the merger of the American Paper Institute and the National Forest Products Association, and our headquarters moved from New York City to Washington, D.C. to focus on public policy issues. We have included some key achievements of the past quarter century in this report. The industry leaders who initiated the formation and move of our association would be proud of what the industry has accomplished by working together.

Please take a moment to review our accomplishments in 2018—and over the past 25 years—in this issue of Delivering Results.
ABOUT AF&PA

The American Forest & Paper Association (AF&PA) is the national trade association of the pulp, paper, packaging, tissue and wood products manufacturing industry. Our members’ products are essential to daily life — facilitating communications, education, food preservation and storage, hygiene, product protection, and shelter and homes.

• We represent 113 companies and associations.

• Our membership encompasses about 85 percent of industry capacity.

• Our industry employs approximately 950,000 workers, manufactures nearly $300 billion in products annually and is among the top 10 manufacturing sector employers in 45 states.

• Our volunteer leadership and members are actively involved in all aspects of the association, maximizing their membership benefits.
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Mission:
PUBLIC POLICY & MARKETPLACE ADVOCACY

10 regulatory reforms complete and 14 underway

2 regulations avoided: revisions of industry’s effluent guidelines; Hazardous Substances Spill Prevention, Control, and Countermeasure program

10 state greenhouse gas-related bills defeated

Carbon neutrality legislation passed the House and Senate; carbon neutrality recognized in Affordable Clean Energy proposal

$9.6 billion paper export market preserved in U.S.-Mexico-Canada Agreement

Proposed Waters of the U.S. Rule issued with wastewater treatment exemption intact and improved

Environmental Protection Agency position on Human Health Water Quality Criteria rule changed in Maine, under review in Washington
AF&PA's mission is to advance a sustainable U.S. pulp, paper, packaging, tissue and wood products manufacturing industry through fact-based public policy and marketplace advocacy.

TRADE

Free and fair trade policies are essential to our business. These policies include ensuring trade agreements recognize the benefits of our interconnected supply chain; markets remain open to our industry's exports; and all nations play by the rules so trade flow is not arbitrarily distorted.

- We urged the Administration to seek a negotiated resolution of trade disputes with China, rather than tariffs. Prolonged trade disputes and retaliatory tariffs on U.S. exports jeopardize the gains our industry and its workers stand to reap from sales to the growing customer base outside the U.S. The U.S. Trade Representative removed five products requested by member companies from the Chinese tariff list and included AF&PA's perspective in official comments to Chinese government officials on recycling regulations.

- Several board members met with Administration and congressional leaders on North American Free Trade Agreement priorities. The new U.S.-Mexico-Canada Agreement preserves duty-free market access for $9.6 billion of pulp and paper exports; commits member countries to combat illegal logging and associated trade; enhances regulatory cooperation; and promotes science-based regulatory practices. However, it reduces protection for U.S. manufacturing companies investing in Canada and Mexico that we sought to preserve.

- We submitted industry goals to the Administration for the upcoming U.S.-European Union trade negotiations, emphasizing the need to eliminate or reduce non-tariff barriers and regulations that hinder market access; cut renewable energy subsidies that could distort the wood fiber market; and cooperate in combatting illegal logging and trade.
REGULATORY REFORM

The cost, complexity and volume of regulations disproportionately affects manufacturers. AF&PA is making progress on efforts to improve the regulatory process to promote U.S. manufacturing and job creation and enhance societal well-being.

- AF&PA achieved continued congressional recognition of biomass carbon neutrality in 2018 federal funding bills. We testified before the U.S. Environmental Protection Agency’s (EPA) Science Advisory Board on the new draft report supporting data-based carbon accounting. We also reached agreement with agriculture groups and proposed a biomass carbon neutrality framework for agriculture and forestry, including manufacturing residuals.

- We testified in Congress in support of New Source Review (NSR) reform by EPA and other administrative and legislative regulatory reforms, and supported development and introduction of NSR reform legislation in the House.

- We secured four improvements to EPA’s NSR air emission accounting policies that reduce regulatory uncertainty and permit delays; and elimination of the Once-In-Always-In policy to reward and encourage emissions reductions. EPA announced reconsideration of regional haze policies consistent with AF&PA’s recommendation, established air modeling thresholds so smaller projects avoid permitting burdens and delays, and gave states the authority to consider international emissions when developing air quality plans.

- We achieved a litigation victory on an environmental non-governmental organization appeal of Boiler MACT startup and shutdown provisions. We filed a rulemaking petition to EPA to reduce restrictions on the combustion of certain biomass materials in boilers.

- Consistent with AF&PA recommendations, EPA revamped its process for setting National
Ambient Air Quality Standards to provide more scientific balance. AF&PA testified before the newly constituted advisory committee highlighting scientific uncertainties in the peer reviewed literature on particulate matter health effects, including a study AF&PA helped sponsor.

- The Administration proposed a new Waters of the U.S. rule that retains and improves the wastewater treatment exemption important to our members.

- Based on input from AF&PA and the National Council for Air and Stream Improvement, EPA decided against revising effluent guidelines for our industry.

- We had a leadership role in a multi-faceted campaign — including legislative and regulatory advocacy, communications, and litigation — that convinced EPA to no longer defend the previous Human Health Water Quality Criteria policies in Maine and reconsider them in Washington.

- We convinced EPA not to impose more stringent Spill Prevention, Control, and Countermeasure requirements for hazardous substances released to water in their proposed rule.

- On state greenhouse gas regulation, we defeated eight bills to change state renewable portfolio standards impacting biomass; defeated legislation creating cap and trade programs in Maryland and Oregon; opposed proposed regulation to join the Regional Greenhouse Gas Initiative in Virginia; and defeated a $20 per ton carbon tax—with an estimated industry cost of $840 million over the next decade—in Washington State.

- Finally, we advanced systemic reforms to the regulatory process through a business coalition, and EPA has initiated a rulemaking to ensure stronger use of cost-benefit analysis and sound science in implementing its regulatory statutes.
PAPER-PRODUCT POLICIES

AF&PA supports policies that respect market dynamics and consumer choice and opposes unwarranted regulatory measures that distort markets for our products and harm consumers.

- AF&PA joined a stakeholder letter to Congress supporting six-day mail delivery and submitted two sets of comments to the Postal Regulatory Commission on postal rates and solvency. Six member company executives joined AF&PA in conveying industry-supported policies to the Presidential Postal Task Force.

- We defended tissue products in flushability specifications to the International Water Services Flushability Group and developed a Value of Tissue infographic and a fact sheet on bleaching.

- One AF&PA-supported paper bag preemption bill passed. Six state fee or ban bills were defeated through our advocacy.

- Our advocacy against a ban on perfluorinated chemicals in foodservice packaging in Washington State resulted in a two-year delay in implementation. We engaged with the Paper Cup Alliance on a new plan to defend products against onerous state and local regulation.

- We presented the AF&PA-MIT China White Paper explaining the effects of China’s recovered paper import policy on the U.S. industry to CalRecycle, Northeast Recycling Council, the Washington State Recycling Association, the New York Department of Environmental Conservation, the Massachusetts Department of Environmental Protection and EPA. We also provided industry feedback on the new (post-China National Sword) recycling market for National League of Cities’ municipal action guide.
- Our advocacy against CalRecycle’s proposed framework for packaging reform, which would have regulated corrugated and paper-based liquid packaging, resulted in a “time out” while CalRecycle reassesses their approach.

- On paper options, we influenced the Securities and Exchange Commission (SEC) Final Rule on disclosure requirements for mutual fund investments to maintain paper delivery until 2021 and joined litigation opposing SEC actions on Rule 30-e3. Our advocacy brought key lawmakers to the table in support of our position.

- We convinced EPA to fix confusing and conflicting information on its website regarding the definition of recovered fiber content for paper procurement.
TRANSPORTATION EFFICIENCY

Our industry faces a nationwide shortage of transportation capacity and inefficiencies. Moving raw materials to mills and moving products to customers remains increasingly difficult and costly. AF&PA advocates for safely increasing truck weight limits on federal interstate highways; and freight rail system rate and service improvements.

- We urged key officials at the White House, Department of Transportation, U.S. Department of Agriculture, Federal Motor Carrier Safety Administration and Congress to support a pilot program to allow 91,000 pound six axle trucks on the Interstate. Forty-seven House members signed a letter advocating for the pilot program.

- On rail, paper industry CEOs joined other shippers by sending letters to the President urging Surface Transportation Board (STB) nominations. Our advocacy resulted in the confirmation of two new STB nominees by the U.S. Senate.
Vision 1: ENGAGING MEMBERS & STAKEHOLDERS

3 new company members welcomed – NORPAC, Caraustar and Nippon Dynawave

Governance review and committee realignment

3rd Annual Safety Workshop

68 industry employees participated in PPRC Fly-In

6 state and 5 DC advocacy days/fly-ins

83 percent of members participated in an AF&PA meeting
MEETINGS WITH ELECTED OFFICIALS

• AF&PA supported the Pulp & Paperworkers’ Resource Council Fly-In, which brought 68 mill workers to Capitol Hill for nearly 500 meetings with offices in the U.S. House of Representatives, the U.S. Senate and key members of the administration. Priority issues included the carbon neutrality of biomass, Human Health Water Quality Criteria, cumulative regulatory burden and transportation efficiency.

• We held a fly-in on tax reform regulations, where members and AF&PA staff represented our Tax Resource Committee at the Department of Treasury. Members also met with Senate Finance Committee staff to underscore the positive investment benefits of tax reform on the paper and wood products industry.

• We held advocacy days in Massachusetts and California. In Boston, our members advocated for public policy that will help Massachusetts companies grow the economy and create jobs, and discussed environmental initiatives with state leaders. In Sacramento, we met with policymakers and CalRecycle to promote the paper industry’s economic impact and important role in recycling and paper recovery. This included advocating against a regulatory response to China’s ban on mixed paper imports and urging policymakers to carefully consider any new regulation or legislation that would increase costs for companies in the state.

• AF&PA also participated in meetings with regulatory agencies in California, New York, Oregon and Massachusetts on recycling rates, recovery programs and the potential impacts of extended producer responsibility.

OUR REPORT ON AF&PA’S 2018 RESULTS CONTINUES ON PAGE 17
Celebrating 25 years of advocacy, research, data and results
The following is a selection of notable AF&PA achievements from 1993-2018 that have shaped our association’s advocacy and enhanced our industry’s reputation.

**Sustainability**

- Increased U.S. paper recovery for recycling by 70 percent \[1993-2017\]
- Reduced greenhouse gas emissions from manufacturing facilities by 30 percent \[1993-2016\]
- Reduced sulfur dioxide emissions by 75 percent \[1993-2016\]
- Began the Sustainable Forestry Initiative® program (now an independent forest certification standard) \[1994\]
- Launched Better Practices, Better Planet 2020 – a comprehensive set of sustainability goals \[2011\]
- Surpassed the Better Practices, Better Planet 2020 greenhouse gas reduction and workplace safety goals ahead of schedule \[2014\]

**Regulations**

Over the past 25 years, we avoided about $25 billion – on average, $1 billion a year – in capital costs from onerous and unnecessary regulations. Examples include:

- Saved members $8 billion in capital costs from the proposed Environmental Protection Agency (EPA) Cluster Rule \[1997\]
- Persuaded EPA to change final Residual Risk rule, which reduced potential costs from $900 million to $5 million \[2012\]
- Achieved revised EPA Boiler MACT rule, reducing industry capital costs from proposed $9 billion to $1 billion \[2013\]
- Saved $1.1 billion by defeating changes to the ozone rule \[2015\]
- Saved $3.8 billion in capital costs in EPA’s proposed Pulp Risk & Technology Review (RTR) rule \[2016\]
- Prevented adoption of additional $200 million requirement from final Pulp RTR rule \[2017\]

**Legislation**

- Saved industry 10 percent of its freight bill by successfully lobbying for amendments to the Ocean Shipping Act \[1998\]
- Issued landmark study and achieved passage of corporate dividends tax cut, reducing cost of capital for U.S. paper and wood products manufacturing \[2003\]
Achieved enactment of Section 199 treatment for forest products manufacturing [2004]

Defeated “cap and trade” legislation in 13 states [2007]

Won enactment of legislation to combat illegal logging in Farm bill [2008] and defended efforts to weaken the protections [2014]

Prevented premature termination of the Alternative Fuel Mixture Tax credit [2009]

Achieved industry priorities in historic tax reform adopted by Congress, which lowers industry taxes on a permanent basis by approximately $700 million [2017]

Realized passage of long-advocated federal carbon neutrality legislation signed into law [2017]

Defeated numerous mandatory recycled content and packaging bans and fees at the state and local level [1996-2018]

Secured recognition of the industry’s biomass energy in 11 states [1993-2018]

Defeated Maryland legislation challenging carbon neutrality of biomass and exclusion of paper industry bioenergy from renewable energy program for five years in a row [2013-2018]

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**Marketplace Policies**

- Reshaped EPA’s paper procurement guidelines on recycled content [1995]
- Published Strategic Plan Report on industry competitiveness [2001]
- Supported Postal Service legislation to stabilize postage rates [2002]
- Defeated legislation to make Leadership in Energy and Environmental Design (LEED) the green building standard in eight states [2002]
- Partnered with mailers to defeat “do not mail” legislation in 15 states [2007]
- Achieved exemption of our products from Consumer Product Safety Commission regulations [2009]
- Led the charge for House resolution to ensure paper options in government products and services [2013]
- Defeated Extended Producer Responsibility legislation in Rhode Island and North Carolina [2013]
- Paper and wood products recognized as “bio-based” under the U.S. Department of Agriculture’s BioPreferred Program [2014]
- Defeated legislation that would have imposed a tax on paper bags in Connecticut, Delaware, Maine, Maryland, Massachusetts and Rhode Island [2015]
International Trade

- Led formation of the International Council of Forest and Paper Associations and served as its first president [2002] and again a decade later [2012-2015]
- Prevailed in coated paper antidumping case in China [2003]
- Demonstrated Chinese government subsidization of paper industry in a study leading to successful paper industry trade cases against China [2006]
- Successfully countered injury allegations by Turkish producers regarding imports of uncoated free sheet paper [2015]

Communications & Outreach

- Launched Paper Check-off promotion program (now operating independently as the Paper and Packaging Board) [2014]
- Led the Biomass101 communications coalition to address incomplete and inaccurate news coverage on the carbon neutrality of biomass [2015]
- Joined the North American Forest Partnership to tell the complete, #forestproud industry supply chain story [2017]

Litigation

- Won major U.S. Court of Appeals victory on the scope of permits under the Clean Water Act [2001]
- Unanimous D.C. District Court ruling upheld the 2002 New Source Review rule, preserving savings of over $1 billion capital expenditures [2005]
- Achieved U.S. Supreme Court reversal of a negative Ninth Circuit decision requiring permits for forest roads [2013]
We engaged members, strategic alliances and other stakeholders to promote solutions that will advance the industry’s sustainability and competitiveness.

INDUSTRY EVENTS

• **Paper2018** in New York City drew nearly 800 attendees. Co-hosted with the National Paper Trade Association, our premier annual industry event provided superior networking opportunities and engaging sessions for industry executives.

• Our annual executive leadership event, **Presidents Forum**, was held in Dallas, Texas and focused on big ideas, big successes and AF&PA’s big anniversary: 25 years. Thought leaders and experts in the fields of economic policy, politics, trade, transportation and sustainability presented cutting-edge information members could take home and put to use in their business decision making.

• For the third consecutive year, we held our **annual safety workshop**, which brought together company member safety experts to reduce serious injuries and fatalities (SIFs) within the industry. Participants heard from outside safety professionals; shared insights on ways to improve safety performance; and recommended a voluntary SIF program to identify and remedy SIF precursors in facilities. The program was approved by AF&PA’s Board of Directors.
AF&PA MEMBERSHIP

We welcomed new company members Caraustar Industries, Inc., Nippon Dynawave Packaging and North Pacific Paper Company, LLC.
Vision 2:

RESEARCH, INDUSTRY DATA COLLECTION, ANALYSIS & REPORTS

5,000+ statistics files downloaded by members and subscribers

17 reports and policy papers released on air quality health effects, safety, capacity, recycling, sustainability, circular economy and products
STUDIES, REPORTS & ANALYSES

• Issued our Annual Safety Benchmark Report as well as a Mid-Year Safety Benchmark Report

• Issued annual serious injuries and fatalities (SIFs) survey results

• Provided a draft assessment of alternative modeling thresholds for ozone to inform mill air quality modeling for new projects

• Issued the 2018 AF&PA Biomass Research/Renewable Portfolio Activity Compendium

• Distributed the 2018 Sustainability Report, showcasing members’ substantial progress on our industry-wide Better Practices, Better Planet 2020 sustainability goals

• Published the 58th Paper Industry Annual Capacity and Fiber Consumption Survey

• Announced the 2017 paper recovery rate — 65.8 percent — along with other recovery statistics on paperrecycles.org

• Published a Foodservice Packaging Recyclability Assessment

• Released the semi-annual Containerboard Continuous Baseline

• Issued a white paper on ENGO paper-related campaigns titled Environmental Campaign Focus: Plastics, Paper, and the Circular Economy

• Completed a Mixed Paper Bale Audit, which identifies the composition of mixed paper in residential and commercial office recovery streams

• Revised the Commercial Tissue statistical report based on input from report participants

• Published the AF&PA-MIT China White Paper on the effects of China’s policy on recovered fiber imports

• Completed a legal review of the Receiving Electronic Statements To Improve Retiree Earnings (RETIRE) Act to evaluate potential paper options engagement

• Hosted a symposium of government, academic, state and industry stakeholders that showcased alternative methods for evaluating the public health effects of particulate matter exposures

• Updated our state and national forest products industry economic impact fact sheets

We collected industry data and developed research, analysis and reports to support business and policy decision making.
The Statistics department introduced a new way to engage sector representatives on our members-only website, StatMill.org. Using mail-merge technology, AF&PA Statistics staff now sends automatically customized emails to all sector representatives with highlights from the latest reports in printing-writing, containerboard and boxboard, including direct links to the reports and the login information for each recipient. The benefits of this approach are increased member interaction with our statistics; reduced time and effort for members in accessing reports on StatMill; and improved ability for staff to track executive interest in our reports over time.

During 2018, employees at 35 different member companies downloaded reports from StatMill.org. There were more than 5,000 files downloaded in 2018, including 3,900 downloads of 45 distinct reports; and 1,500 downloads of 14 different data sets. The Statistics team also responded to 174 requests from members, the third highest total since we began tracking requests in 2014.
Vision 3: SPEAK ON BEHALF OF AF&PA MEMBERS WITH A UNIFIED VOICE

84 candidates supported through the AF&PA PAC
$200,000 raised for AF&PA PAC
87 facility visits by elected officials and candidates
12 grassroots outreach alerts on priorities, elections
2,143 earned media placements
24 percent growth in social media reach year over year
SOCIAL MEDIA

• In 2018, we grew our reach on social media by 24.4 percent, adding more than 4,300 fans and followers. Our impressions increased by 27.6 percent. Most significant though was the growth in engagement, which includes things such as likes, comments, shares, link clicks, etc. We grew by 136.1 percent over last year, and much of that growth is attributed to organic posts regarding sustainable forestry that went AF&PA’s version of viral.

• Our most popular posts of the year were on the International Day of Forests on March 21. Two posts received 25,111 engagements combined. We continued to test those messages throughout the year with similar success.

PAC & GRASSROOTS

• AF&PA launched its Get Out The Vote campaign in March to boost industry employee voter turnout in the 2018 midterm elections.

• Overall in 2018, we supported 84 candidates — which included 23 industry-specific PAC events for 33 candidates — and created spotlights on 11 congressional champions.

• Elected officials participated in 87 visits to member facilities.

We spoke on behalf of AF&PA members to a wide range of audiences and helped the industry project a unified and informed voice on public policy.
We tried **new things** through digital media, such as geo-fenced display ads, a mobile game and video ad pre-roll. We supported state advocacy days and CEO issue fly-ins throughout the year.

Social and digital media was instrumental in the inaugural **holiday e-commerce campaign** and garnered high engagement rates.

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**2018 AF&PA SUSTAINABILITY REPORT**

We were proud to announce that our members exceeded the *Better Practices, Better Planet 2020* goals to improve energy efficiency and improve workplace safety ahead of the 2020 schedule, and that they nearly reached the new greenhouse gas emissions reduction goal.

Our **report release** was picked up by approximately 200 media outlets, and our social media campaign garnered more than 427,000 impressions and 1,300 engagements.
NATIONAL FOREST PRODUCTS WEEK

• During the 58th anniversary of National Forest Products Week, AF&PA, our members and allies underscored the value and contributions of our industry’s products and employees to society and the economy. Trade, recycling, carbon neutral energy production, workforce and products were highlighted to illustrate the breadth of our industry’s importance.

EARNED MEDIA


• Op-ed, column and blog placement and mentions included regulatory reform blogs in E&E and Bloomberg; six bi-monthly columns in PaperAge; and a forest biomass regulation-focused op-ed in the Richmond Times Dispatch. The association’s holiday e-commerce public affairs campaign earned op-ed placements in The Sacramento Bee, The Spokesman-Review and The Everett Herald and a blog placement on the Northeast Recycling Council website.
Vision 4:

STAFF EXCELLENCE

6 staff development training sessions + 1 mill tour
1 staff survey to gauge efficiency, alignment and culture
New Government & Industry Affairs Department
AF&PA staff gained new skills to better represent the industry.

**ORGANIZATIONAL EFFICIENCY**

- We created the new **Government & Industry Affairs department** to improve our advocacy effectiveness and internal efficiencies. Bringing together existing talent from AF&PA’s former Paper Group and Government Affairs staff, the new department creates more opportunities to collaborate, coordinate and align on important projects, such as the increasing number of product and marketplace policies that are intersecting with state and federal legislation.

**STAFF DEVELOPMENT**

- Our talented staff benefited from **development opportunities and training** on goals and deliverables, record retention and antitrust compliance, and gained access to the LinkedIn Learning platform.

- Ten AF&PA employees **toured WestRock Company’s paper mill** facility in West Point, Virginia. The visit provided an informative experience for newer staff and a refresher for those who haven’t recently visited member facilities. Staff were able to see firsthand the hard work and dedication that goes into producing our industry’s products every day.
2019 AF&PA LEADERSHIP

Pete Watson  Chairman
President & CEO, Greif, Inc.

Mark Sutton  First Vice Chairman
Chairman & CEO, International Paper Company

Michael Doss  Second Vice Chair
President & CEO, Graphic Packaging International, Inc.

John Rooney  Immediate Past Chairman
President & CEO, Evergreen Packaging, LLC

Donna Harman  President & CEO
American Forest & Paper Association

AF&PA MEMBER COMPANIES
For a list of our Association Members and Associate Members, please visit
https://www.afandpa.org/about/membership-directory

American Eagle Paper Mills
The A. Johnson Co., LLC
Caraustar Industries, Inc.
Clearwater Paper Corporation
Domtar
DS Smith North America Packaging and Paper
Essity
Evergreen Packaging, LLC
Flambeau River Papers
French Paper Company
Georgia-Pacific LLC
Graphic Packaging International
Green Bay Packaging Inc.
Greif, Inc.
Hollingsworth & Vose Company
Hood Container Corporation
Hull-Oakes Lumber Co.
International Paper Company
Johnson Timber Corporation
Liberty Diversified International
Masonite Corporation
Monadnock Paper Mills, Inc.
Nippon Dynawave Packaging
North Pacific Paper Company, LLC
Packaging Corporation of America
PaperWorks Industries, Inc.
Pratt Industries, Inc.
The Price Companies Inc.
The Procter & Gamble Company
Rand-Whitney
Resolute Forest Products
Sappi North America
Seaman Paper Co. of Massachusetts, Inc.
Simpson Lumber Company, LLC
Sonoco Products Company
Soundview Paper Company
T&S Hardwoods, Inc.
TimberWest Forest Corp.
Twin Rivers Paper Company
UPM
WestRock Company