



**American  
Forest & Paper  
Association**

**2020: YEAR IN REVIEW**

# *Essential Products, Sustainably Made*



## ***Industry Delivers with a “Can Do” Spirit***

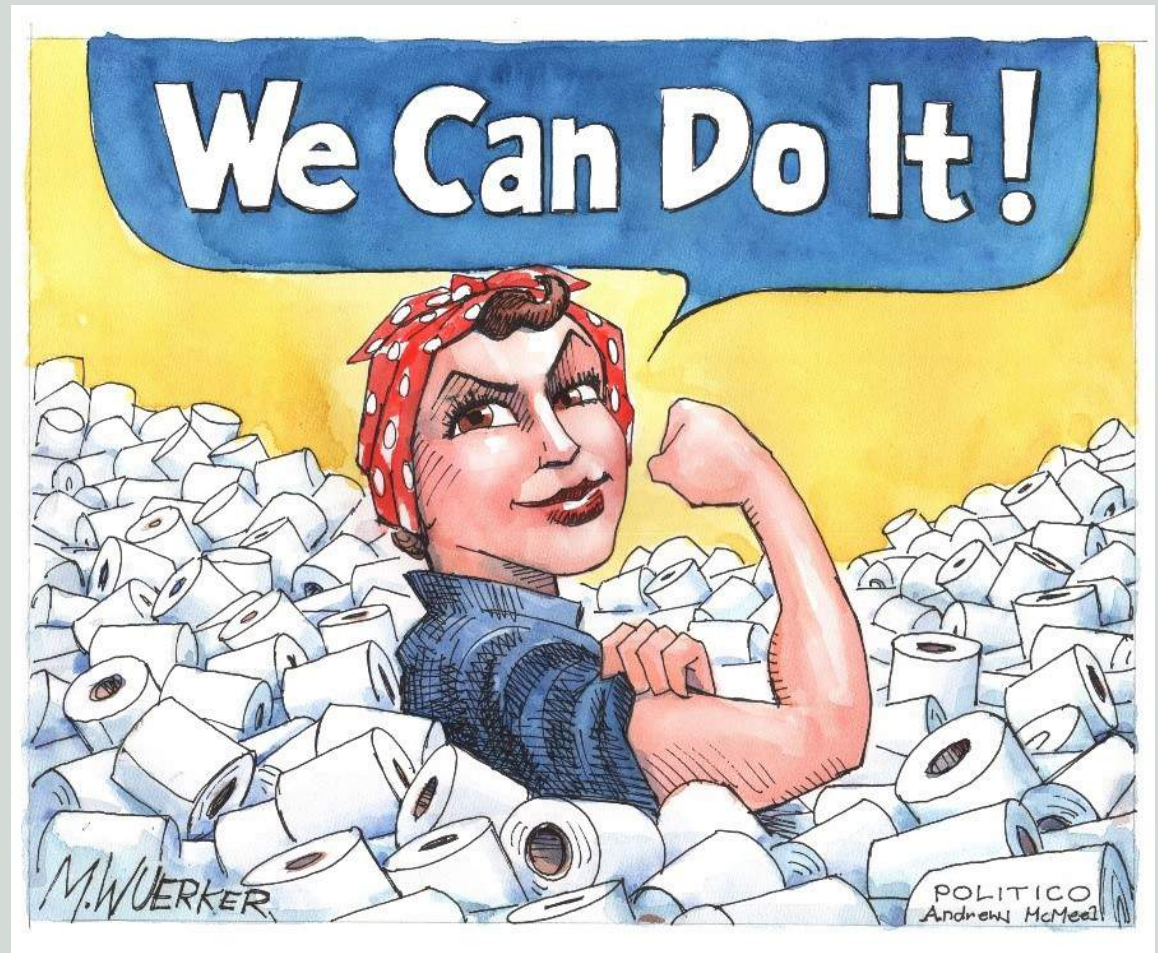
At the onset of the pandemic, AF&PA worked swiftly to respond to media requests about product demand. AF&PA developed press statements and secured media coverage to promote safe and essential member responses to the increased demand for tissue products during the COVID-19 pandemic.

*The Associated Press* reported AF&PA tissue data related to record-breaking March and April production—the equivalent of more than 4 pounds of tissue for each U.S. resident.

*Politico Playbook* amplified AF&PA tissue data and created a toilet paper themed “We Can Do It” cartoon, speaking to the industry’s resiliency and resolve during an unprecedented period of demand.

The artist, Matt Wuerker, is a Pulitzer Prize-winning artist and founding member of *Politico*. The black-and-white cartoon originally appeared in *Politico Nightly* on April 30, 2020, and AF&PA commissioned the artist to produce a color version and purchased the rights to use the art.

While tissue demand took center stage in media coverage in March and April, the entire paper and wood products industry played an important role this year to safely manufacture and deliver the essential products that people rely on.



**I**n 2020, our industry was tested like never before. The realities of a global pandemic and its economic impact – as well as social and political tensions – affected everyone across our nation. And while these challenges were painful and immense, each of us – the 950,000 men and women of the forest products industry – rose to the occasion. We worked to strengthen our country while supplying essential and sustainable products to make everyday life possible.

During moments of great uncertainty, our industry accepted the challenge to be more adaptable than ever before. Throughout the pandemic, our industry has remained essential *because our people* making sustainable products are essential. That is why safety has and will always be our top priority. In 2020, the American Forest & Paper Association and its members implemented measures and protocols in response to COVID-19 and put into action business plans prioritizing health, well-being and safety.

Members of AF&PA dug deep to support others, supplying record rates of tissue – more than four pounds for every American in March alone – and meeting the demand for paper-based packaging, especially as online shopping has become a vital part of how Americans engage in social distancing, while still getting the supplies and products they need.

Our members also stepped up to support others – donating items of critical need to our healthcare heroes, including masks and personal protective equipment; working in communities to support local nonprofits like food banks and disaster aid and relief organizations; and leading by example with our *Better Practices, Better Planet 2020 Sustainability Initiative*.

This year, we will continue our work on issues such as

safety, as well as a member-led effort to advance new and comprehensive sustainability goals for the decade ahead. Recognizing that sustainable practices are the foundation of our industry, we will continue to promote and grow economic contributions while protecting the environment and ensuring our resources will be available for future generations.

Finally, we acknowledge that there will be more challenges on the road ahead. Importantly, in 2020 our voice has become stronger. During the last year, AF&PA grew its membership to include two company members, New-Indy Containerboard, LLC and Ahlstrom-Munksjö, an association member, Paper Receipts Converting Association, and an associate partner supplier, CR Meyer.

In the pages ahead, you'll read how our industry turned resiliency into resolve with a "We can do it!" attitude. Thank you to the AF&PA Board of Directors and our engaged members for your leadership and your commitment to safety and sustainability.

We look forward to continued strength as an essential industry and brighter days ahead.

Stay safe and be well,



**Heidi Brock** PRESIDENT & CEO,  
AMERICAN FOREST & PAPER  
ASSOCIATION

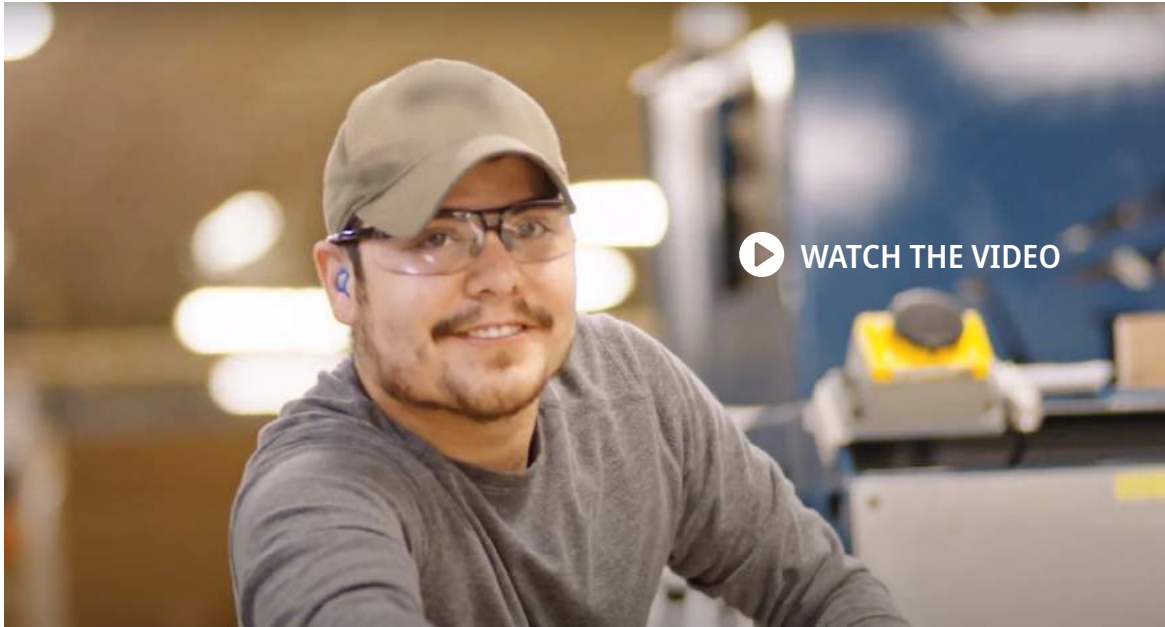


**Mark Sutton** CHAIRMAN & CEO,  
INTERNATIONAL PAPER COMPANY

*Heidi Brock*

*Mark Sutton*





## ***Thank You***

AF&PA and the **Pulp & Paperworkers' Resource Council** launched a 'Thank You Essential Workers' video to recognize the important role the paper and wood products industry plays in delivering essential products to communities far and wide.

## ***Positioning the Industry: Safe, Sustainable, Essential***

In 2020, the COVID-19 pandemic was our primary focus. We have no higher priority than the safety of our association employees and the industry workforce. Amid this pandemic, however, we continued to make progress on important issues for the industry.

### ***Advancing a Safe & Healthy Workforce***

AF&PA was swift to act at the start of the pandemic and helped secure the essential designation for our industry. AF&PA **secured guidance from the Equal Employment Opportunity Commission (EEOC)** that allowed employee temperature testing and other measures to protect the industry workforce and ensured that mill operations could continue. AF&PA also requested and received **clarifying safety guidance from the Centers for Disease Control and Prevention (CDC)** that, in addition to Environmental Protection Agency (EPA)-registered brand-name disinfectants, properly diluted ordinary bleach is also appropriate for disinfecting worksites against COVID-19.

AF&PA **launched a public COVID-19 webpage** to update on state-specific essential status and broadly share with supply chain partners and global industry leaders timely, industry-specific information on workplace safety, scientific studies and guidance from leading authorities on paper product safety, economic relief programs, general information and press coverage. In May and July, **AF&PA hosted well-attended discussions** for members to share learnings on how to reduce the risks of COVID-19 in operating mills and workplaces.

### ***Ensuring Critical Supply Chains Continue***

AF&PA worked to ensure that our industry's critical supply chains continued to operate during the pandemic. **Cyber and Infrastructure Security Agency (CISA) guidance** noted the essential nature of Critical Manufacturing and associated supply chains. AF&PA also worked to successfully include language in the **Coronavirus Aid, Relief, and Economic Securities (CARES) Act** to allow states to issue waivers for oversized trucks on interstate highways.

# Prioritizing Safety

The health and safety of our workers remains a number one priority for AF&PA and our member companies. During the pandemic, we worked to provide timely and accurate, industry-specific information to members through our COVID-19 webpage. We also advanced programs to reduce Serious Injuries and Fatalities (SIFs):

- Issued 2019 Safety Benchmark Survey and SIF Report
- Held our fifth annual safety workshop in October with presenters from five member companies and the United Steelworkers
- 24 member companies signed up for AF&PA's voluntary SIF prevention program
- Emphasized industry and employee safety with a feature story in *Fastmarkets RISI Pulp & Paper Week*

# Promoting & Protecting Our Products

Our advocacy efforts may look different today, but the work toward our advocacy priorities at the state and federal levels has not stopped. AF&PA developed press statements and provided media coverage to **promote safe and essential member responses** to the increased demand for tissue products during the COVID-19 pandemic.

AF&PA **launched a successful paper towel promotion** to highlight the benefits of paper towels in helping to address public safety concerns. The campaign resulted in more than 340,000 YouTube video views and 162,000 ThruPlay video views on Facebook.

## California Extended Producer Responsibility (EPR)

legislation was once again defeated, and we successfully defeated late-breaking EPR legislation in Massachusetts. Extensive engagement in Washington state, Virginia and Maryland successfully amended **state bag legislation** to lessen the impact or remove fees on paper bags.

AF&PA engaged in a campaign around the **New Jersey Legislature's** vote to ban paper bags, the first of its kind. Combined organic and paid efforts resulted in more than 622,700 impressions and more than 3,600 engagements.

Leveraging our strong data and statistics, AF&PA ran an **e-commerce campaign** to highlight how boxes are an essential part of the supply chain and promote our consistently high recycling rate. The year-long campaign delivered more than **10 million impressions** and more than 2 million clicks or ad video views.

During the e-commerce campaign, we took risks with new tactics like **interactive quizzes** that paid off with strong engagement.





## Advocating for Recycling Education

AF&PA members approved industry guidance to clear up consumer confusion regarding the **recyclability of pizza boxes**, and we worked to educate local governments and relevant associations, enabling them to amplify this news. The issue gained media coverage in publications such as *Recycling Today*, *RISI Technology*, *Fastmarkets RISI*, *Sierra Club Magazine*, *Pizza Marketing Quarterly Magazine* and *Kitchn*.

AF&PA also connected with **community leaders** where residential recycling programs were suspended during the pandemic, highlighting the industry's need for recovered fiber to manufacture essential products and encouraging communities to restart programs when safe.

AF&PA supported Senators Rob Portman (R-OH) and Debbie Stabenow's (D-MI) **RECYCLE Act**, which recognizes that educating consumers on the right ways to recycle is one of the best ways we can increase the quantity and quality of paper in the recycling stream.



AF&PA's **Think Paper campaign** continued to increase the paper industry's share of media voice, garnering more than 3 million impressions across all social campaigns in 2020. The effort generated 30 pieces of content highlighting the recyclability and sustainability of paper products, resulting in 20,000 unique web site visitors to [think-paper.com](https://www.think-paper.com).



## Yes! Pizza Boxes are Recyclable

### Setting the Record Straight

Pizza box recyclability messaging was also promoted during **America Recycles Week** including a top-performing *Waste Dive* newsletter sponsorship. This message continues to be popular across all social channels.



## Policy Reform Making an Impact

AF&PA remained actively engaged in key policy initiatives throughout the year.

At the start of 2020, AF&PA celebrated a new chapter for **North American Trade under the USMCA Agreement**. AF&PA worked in partnership with the Environmental Protection Agency and states to **streamline the air and water permit process** to facilitate the modernization and competitiveness of our industry's mills.

And we helped secure eight additional cosponsors for the **Know Your Social Security Act**, which restores the mailed distribution of paper social security statements for American workers.

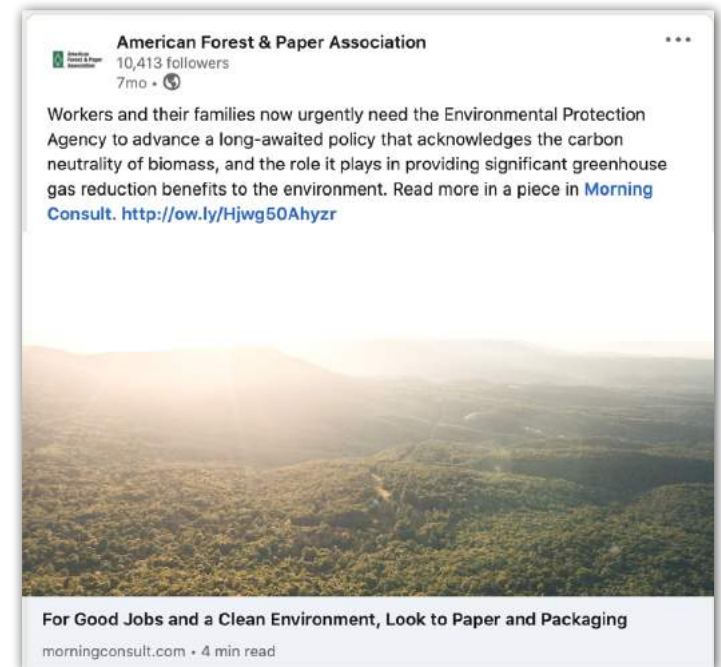
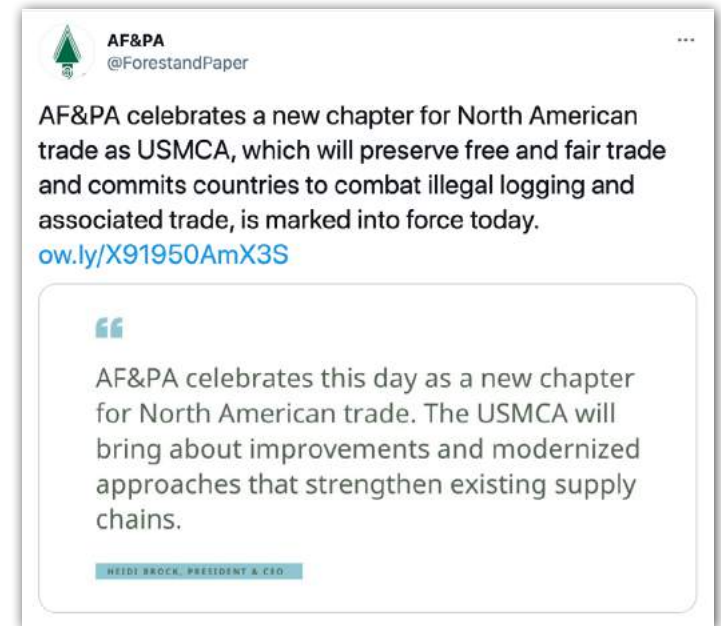
## Renewable Biomass Advocacy

In Washington D.C., we continued to advocate for a proposed rule that designates the **carbon neutrality of biomass**. We penned a joint op-ed with the United Steelworkers, signed a letter with 48 industry associations to former President Trump and generated a Forest Products Industry National Labor Management Committee letter to Administration officials advocating for a rule.

### Safety, Sustainability, Recycling, Remain Top Advocacy Priorities

AF&PA members are committed to environmental stewardship across the value chain — from the raw, renewable wood fiber that is harvested to the energy and water used in the manufacturing process to the recovery of paper and paper-based packaging that is used to make new products.

Policy conversations related to worker safety, sustainability and paper recycling will continue to strengthen our industry's ability to provide consumers with essential, sustainable and recyclable paper products.



## Informing Sound Policy Making

AF&PA public policy and advocacy efforts are driven by facts, and statistics and data are foundations of our work. In 2020, numerous pieces in **major media used AF&PA data** to show how U.S. producers were responding to demand for essential products from our industry. When tissue shortages left many Americans confused and concerned, our industry data demonstrated U.S. producers were responding to their needs. As consumers shifted to the safety of online shopping and home delivery, AF&PA containerboard data provided context on production growth and operating rates.

Throughout 2020, AF&PA leveraged our industry data to strengthen our industry connection with consumers and to sustain our constructive relationships with policymakers. From the member perspective, **58 different StatMill reports were downloaded over 4,000 times.**



# 66.2%

2019 Recycling Rate

### *Consistently high recycling rate*

AF&PA reported a 2019 paper recycling rate of 66.2 percent and 2019 recycling rate for old corrugated containers (OCC) of 92 percent. The three-year average OCC recycling rate is 92.3 percent.



In 2019, 80% of all U.S. mills used some recovered paper to make new paper and paperboard products.



***The first approach combining system dynamics with lifecycle assessment to understand the effects of changes to paper recovery and recycling across the value chain.***

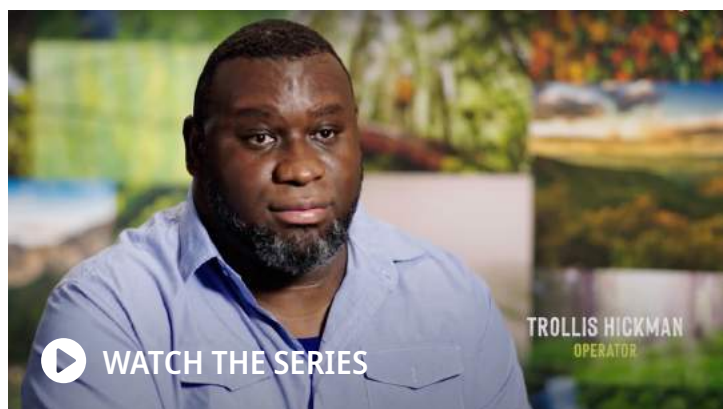
The Dynamic Fiber Flows Model was developed by AF&PA with MIT researchers to **measure the complex behaviors and trade-offs** associated with changes to paper recovery and recovered fiber utilization in paper products based on system-wide interactions that take place within the paper value chain. Using a case study approach, AF&PA provides a comprehensive perspective to help policy makers and decision makers with paper in their supply chains make more informed decisions and avoid unintended consequences.



## Amplifying Our Voice

In a year where events looked very different, AF&PA utilized digital tools to continue to tell our industry's story. From blog posts spotlighting industry champions to virtual events with policymakers, we **leveraged new platforms** to further our reach. These efforts were **recognized by the American Society of Association Executives' (ASAE) *Associations Now*** magazine as a leading example for how to reach members and key stakeholders.

AF&PA partnered with the **Pulp and Paperworkers' Resource Council** to produce a series of videos that promote the paper and wood products industry. Using LinkedIn longform articles, AF&PA highlighted topics related to our industry expertise and **used YouTube videos** to engage members in a direct and virtual medium. AF&PA **spotlighted member stories** during Women's History Month in a series of six blog posts.



# 1,700

Earned media mentions

# 10%

Increase in media mentions  
compared to 2019

# 1.3 Billion

Aggregate readership  
impressions

AF&PA was quoted in national media publications, such as *The New York Times*, *Wall Street Journal*, *USA Today*, *The Washington Post*, *Associated Press*, *TIME*, *FastCompany*, *Bloomberg* and *Politico*, and mentioned in broadcast news segments, including CBS News, ABC News and CNN.

## Advocacy in Action



### ***In person...***

Prior to the pandemic, AF&PA and the Pulp and Paperworkers' Resource Council kicked off the year with traditional in-person advocacy events to engage with policymakers in Washington D.C. as well as in the states. *From left to right: Senator John Boozman (R-AR), Senate Paper and Packaging Caucus co-chair, highlighted the importance of the paper and wood products industry during a reception on Capitol Hill. Representative Suzanne Bonamici (D-OR) met with pulp and paperworkers to discuss the importance of sustainable manufacturing in her district as did Representative Kurt Schrader (D-OR), House Paper and Packaging Caucus co-chair. And Representative Bruce Westerman (R-AR) thanked pulp and paperworkers for their dedication and remarked on the significance of sustainable forest management.*



### ***And virtually...***

While the pandemic halted in-person events throughout the year, our advocacy work did not stop. Leveraging digital tools, AF&PA embraced the opportunity to stay connected to policymakers and legislators through virtual platforms. *From left to right: Heidi Brock joined a briefing with the Working Forest Caucus to discuss the industry's response to the COVID-19 pandemic. Senator Debbie Stabenow (D-MI) attended AF&PA's November board meeting as a guest speaker.*



## Engaging Employees

AF&PA quickly developed and implemented a Business Continuity Plan to ensure seamless association operations and results during COVID-19 with a strong focus on the health and safety of our employees.

In 2020, AF&PA celebrated engagements, marriages, births and retirements. As a team, we conducted important business matters and took time out for virtual social events. In 2020, we completed **eight organization-wide health and wellness workshops** to promote well-being, foster a sense of community and help employees adjust and thrive in the virtual workplace.

AF&PA **launched its Diversity, Equity and Inclusion Team**, which aims to foster an organization that's welcoming, supportive, respectful and inclusive, where each person feels heard and valued, treated equitably and encouraged to develop to their full potential. The DE&I Team will work to provide opportunities for AF&PA employees to explore community service and community engagement in 2021.



*In August, we celebrated the retirement of Sam Kerns, AF&PA Vice President and Chief Financial Officer, with a Washington Nationals baseball themed event.*

*"The Diversity Equity and Inclusion (DE&I) Team was created to focus AF&PA's efforts to enhance a supportive and respectful work environment, recognize and celebrate the organization's diversity and to ultimately improve the effectiveness of the organization. An organization that is supportive, respectful and inclusive, ensuring equitable hiring, governance and policies, allows individuals to fulfill their potential leading to greater organizational success. The DE&I Team works to promote programs and dialogue within AF&PA to foster an environment that leads to greater outcomes for our member companies."*

**ANDREW TOPPS, AF&PA ASSISTANT GENERAL COUNSEL & DIVERSITY, EQUITY AND INCLUSION TEAM LEAD**



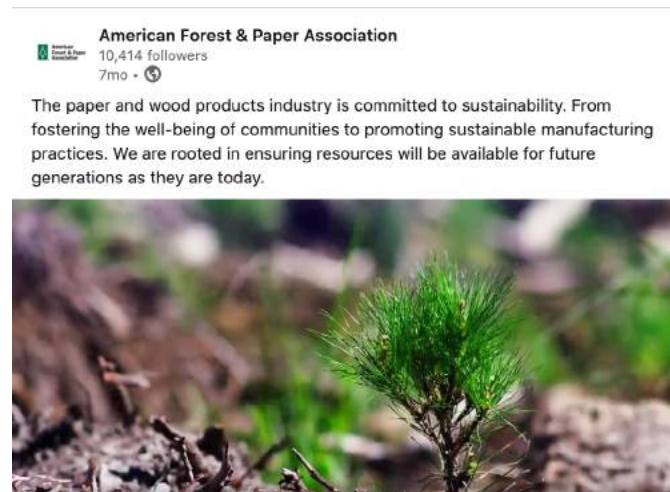
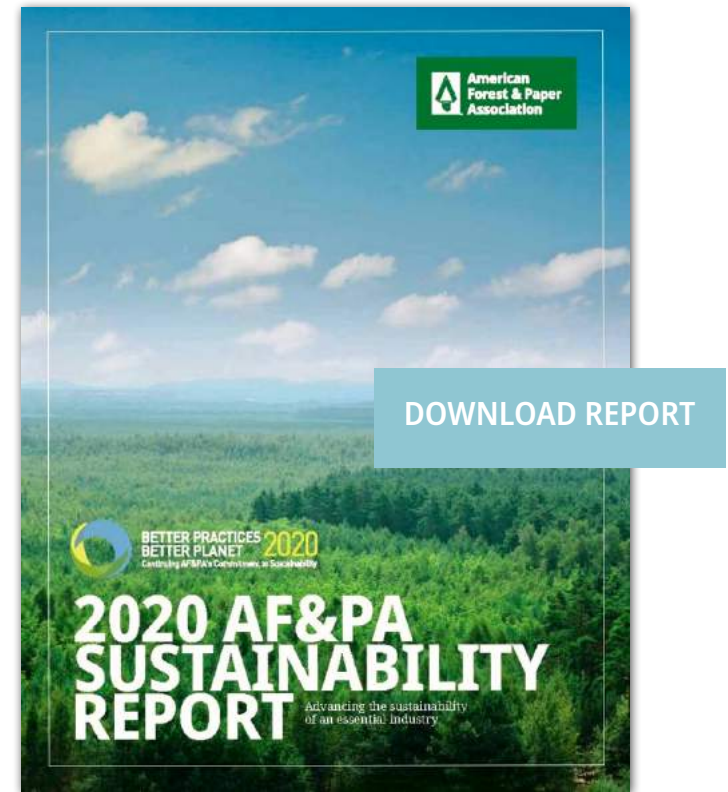
## Leaders in Sustainability

Nearly a decade ago, AF&PA was among the first manufacturing industries to adopt a comprehensive, quantifiable set of sustainability goals. Helping achieve our *Better Practices, Better Planet 2020* initiative is a condition of membership and demonstrates our members' sustainability commitment.

### *To date, AF&PA members have:*

- Surpassed goal for worker safety with a 38.4 percent improvement in the recordable incidence rate from the 2006 baseline.
- Achieved goal for sustainable forestry with members procuring 99 percent of the total wood fiber through a Certified Sourcing Program – a 12 percent increase from the 2005 baseline.
- Surpassed goal for energy efficiency with a 13.3 percent reduction in members' purchased energy use per ton of product from the 2005 baseline.
- Surpassed goal to reduce greenhouse gas emissions with a 23.2 percent reduction from the 2005 baseline.
- Decreased pulp and paper mill water use per ton of product by 6.9 percent from the 2005 baseline.

And in 2019, the paper recycling rate was 66.2 percent, falling shy of the 70 percent goal, but still, nearly a 15 percent increase from the 2005 baseline.



## Advancing Sustainability in the Next Decade

AF&PA's Board of Directors approved **sustainability goals for 2030** which build on our past achievements and push towards greater progress in the decade ahead. The 2030 goals will be released in Spring 2021.

# Sustainability Awards

AF&PA recognized seven member companies for outstanding achievements in leadership and innovation in sustainability. The award-winning projects were **highlighted through a video series** featuring the company CEO and project team members.

The seven award winner videos had more than 350 combined views. Social media posts promoting the awards program performed well, garnering nearly 10,000 impressions and 300 engagements.

## 2020 Sustainability Award Winners:

### LEADERSHIP IN SUSTAINABILITY

- Resolute Forest Products: Energy Efficiency/ Greenhouse Gas Reduction
- Clearwater Paper: Safety
- Evergreen Packaging: Sustainable Forest Management
- Sappi North America: Water

### INNOVATION IN SUSTAINABILITY

- Appvion: Innovative and Sustainable Direct Thermal Technology
- The Price Companies: Restoration & Management of Marginal Agricultural and Timberlands
- WestRock: Pak On Demand™ Pouch System

*"I continue to be impressed by our industry's commitment to leadership in sustainability. Our members are constantly striving to reach new limits of possibility and these awards give us an opportunity to shine a spotlight on innovative sustainability success stories."*

HEIDI BROCK



[▶ WATCH THE SERIES](#)

## AF&PA PAC

Through our political action committee, AF&PA builds relationships with our allies who understand and champion the policies that matter to our industry. The PAC also gives AF&PA a platform to inform legislators and candidates about the importance of our essential and sustainable industry.

In 2020, AF&PA introduced the **Platinum Club**, a new giving tier that enables a maximum \$10,000 contribution for household donors.

AF&PA also supports the **Paper and Packaging Caucus**, which serves to inform members of Congress about the value of the paper and packaging industry in their states and districts. This bipartisan, bicameral caucus highlights the importance and economic significance of the paper and packaging industry and focuses on the policy solutions needed to sustain and promote this important sector. **Four new members were recruited** to the Congressional Paper and Packaging Caucus: Representatives Sanford Bishop (D-GA), Trent Kelly (R-MS), Steve King (R-IA) and Denver Riggleman (R-VA).

**\$153,000**

raised for the AF&PA  
PAC in 2020

**\$120,000**

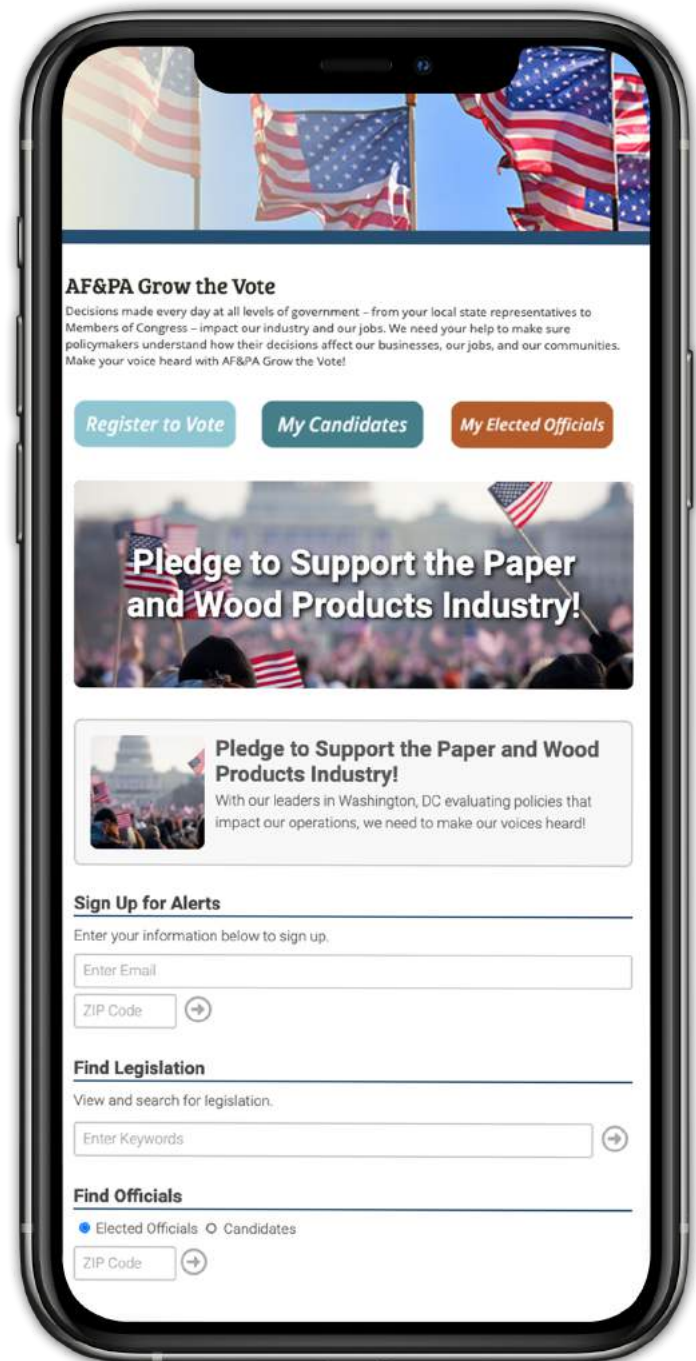
disbursed to federal  
candidates in 2020

## Grow The Vote

We expanded our Grow the Vote initiative to include a **2020 Election Center** to help paper and wood products industry employees register to vote and learn about their candidates. AF&PA also partnered with **Employee Voter Registration Week** to share resources and Grow the Vote materials with members.

***You can get involved!***

**Text paper to 50457** to be a paper and wood products advocate and sign up for AF&PA grassroots alerts.





## *Thank you to our 2020 PAC Contributors*

### **Platinum Club**

**\$10,000 MAXIMUM HOUSEHOLD CONTRIBUTION**

Mark & Laurie Sutton  
Steven & Celia Voorhees  
Peter & Linda Watson

### **Gold Club**

**\$5,000 MAXIMUM PERSONAL CONTRIBUTION**

Heidi Brock  
Dick Carmical  
Howard Coker  
Michael Doss  
Christian Fischer  
Brian McPheely  
Colin Moseley  
John Rooney  
Ken Wallach  
John Williams

### **Contributors of \$2,500 or more**

Elizabeth Bartheld  
John Carpenter  
Jack Carter  
Donald Shirley  
Richard Verney  
Elizabeth VanDersarl

### **Contributors of \$1,000 or more**

Craig Anneberg  
Michael Blume  
Andy Bolton  
Dana Cook  
Charles Davis  
Michael Farrell  
Thomas Kirk  
Paul McCann  
Lindsay Murphy

Paul Noe  
Stacey Panayiotou  
Jan Poling  
Andrew Richards  
Steve Scherger  
Eric Snelgrove  
Mike Wagner  
Adam Webster  
Sheila Weidman



# Membership & Financials

## A Strong Voice for the Industry

The American Forest & Paper Association (AF&PA) represents manufacturers of the essential paper and wood products Americans use every day. We advocate for policies that promote a strong and sustainable U.S. forest products industry.

Our association offers **companies of all sizes** a seat at the table to influence decisions and help shape the future of the industry. In 2020, AF&PA welcomed four new members:

### COMPANY MEMBERS

- New-Indy Containerboard, LLC
- Ahlstrom-Munksjö

### ASSOCIATION MEMBER

- Paper Receipts Converting Association

### ASSOCIATE PARTNER SUPPLIER

- CR Meyer

## Committed to advancing a safe, sustainable industry

As a condition of membership, AF&PA members commit to help the industry make progress toward achieving our *Better Practices, Better Planet 2020* sustainability goals, including sourcing wood fiber in compliance with the Associations’ Forest Procurement Principles. Members are encouraged to participate in AF&PA’s voluntary program to prevent serious injuries and fatalities.

115

companies and associations  
represented in AF&PA  
membership

85%

U.S. industry pulp, paper and  
paperboard capacity represented  
in AF&PA membership

## 2020 Program Spending: \$27.3 Million



Non-core programs\*: \$0.9M

Strategic alliances\*: \$9.2M

Core programs: \$17.2M

*\* Strategic alliances and non-core programs include voluntarily funded strategic initiatives work.*

## 2020 Core Program Cost: \$17.2 Million



Pulp sector: \$0.2M

Tissue sector: \$0.3M

Printing-writing sector: \$1.1M

Recovered fiber sector: \$1.3M

Packaging sector: \$2.6M

Management & General: \$4.7M

Industry-wide Issues: \$7M

*Offset by \$930,000 in association management income*

## 2020 Officers



### CHAIR

**Mark Sutton** CHAIRMAN & CEO,  
INTERNATIONAL PAPER COMPANY



### FIRST VICE CHAIR

**Michael Doss** PRESIDENT & CEO,  
GRAPHIC PACKAGING INTERNATIONAL, LLC



### SECOND VICE CHAIR

**Christian Fischer** PRESIDENT & CEO,  
GEORGIA-PACIFIC LLC



### IMMEDIATE PAST CHAIR

**Peter Watson** PRESIDENT & CEO,  
GREIF, INC.

## AF&PA Leadership

### 2020 Directors

Craig Anneberg CEO, NORTH PACIFIC PAPER COMPANY, LLC

C. Anderson Bolton PRESIDENT & CEO, PAPERWORKS INDUSTRIES, INC.

John Carpenter PRESIDENT, NIPPON DYNAWAVE PACKAGING

Howard Coker PRESIDENT & CEO, SONOCO PRODUCTS COMPANY

Michael Haws PRESIDENT & CEO, SAPPI NORTH AMERICA

William E. Johnson PRESIDENT, JOHNSON TIMBER CORPORATION

Mark W. Kowlzan CHAIRMAN & CEO, PACKAGING CORPORATION OF AMERICA

Yves Laflamme PRESIDENT & CEO, RESOLUTE FOREST PRODUCTS

Donald E. Lewis PRESIDENT, PROFESSIONAL HYGIENE, ESSITY

Richard L. McLeod VICE PRESIDENT, PRODUCT SUPPLY - GLOBAL FAMILY CARE, THE  
PROCTER & GAMBLE COMPANY

Brian McPheely GLOBAL CEO, PRATT INDUSTRIES, INC.

F. Colin Moseley CHAIRMAN, SIMPSON LUMBER COMPANY, LLC

John Rooney PRESIDENT & CEO, EVERGREEN PACKAGING LLC

Alexander Toeldte INDEPENDENT EXECUTIVE CHAIR, CLEARWATER PAPER CORPORATION

Steven C. Voorhees CEO, WESTROCK COMPANY

John D. Williams PRESIDENT & CEO, DOMTAR

George W. Wurtz CHAIRMAN & CEO, APPVION OPERATIONS, INC.





# American Forest & Paper Association

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ForestandPaper



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