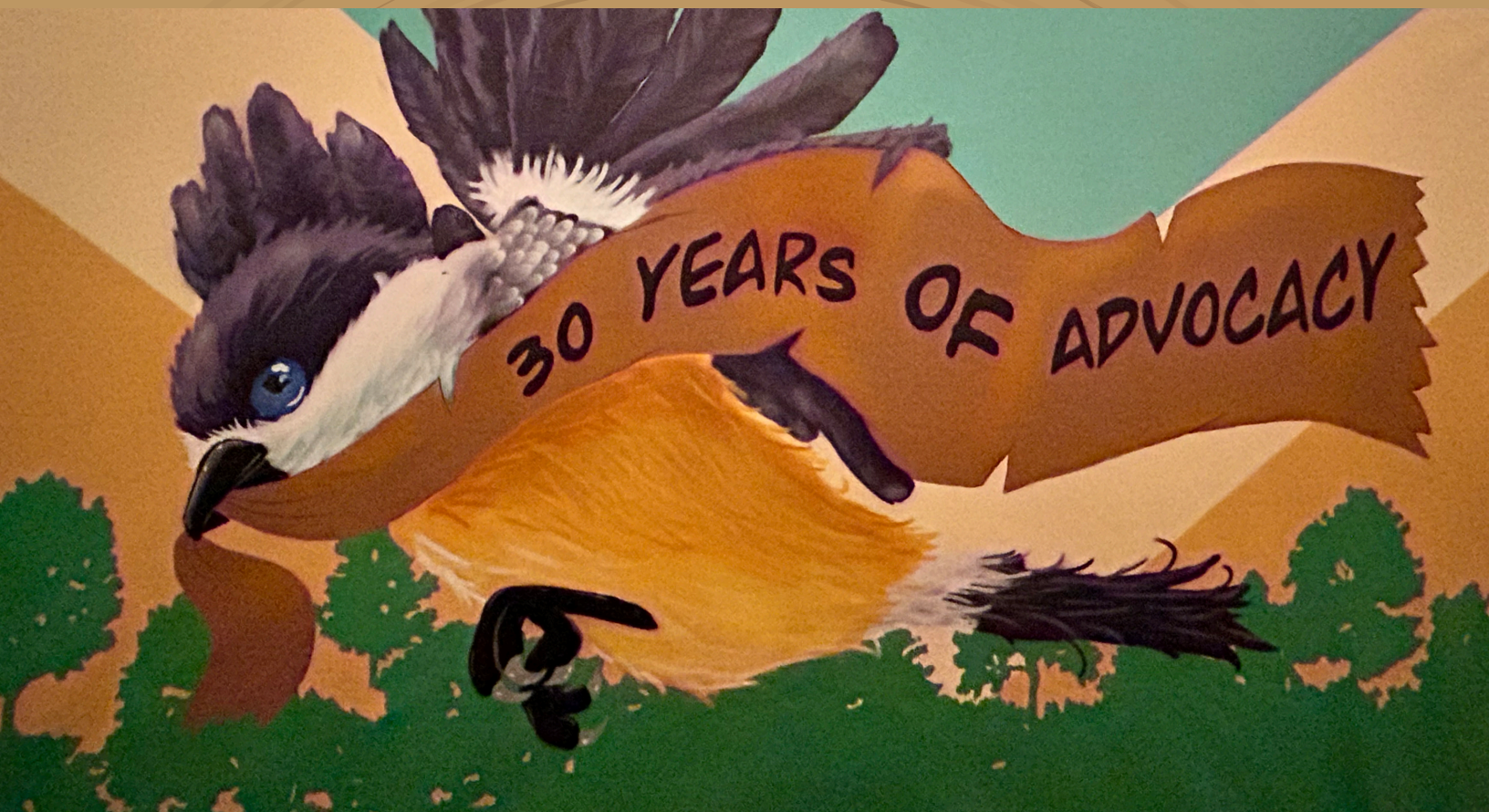




2023 Year in Review



**American
Forest & Paper
Association**



The American Forest & Paper Association (AF&PA) formed in 1993, a result of a merger between the National Forest Products Association and the American Paper Institute. As part of our 30th anniversary celebration, AF&PA commissioned an artist to create a live mural at our annual Presidents Forum.

ABOUT THE ARTIST

Jay "BLVD" Morgan (pronounced Boulevard) is a visual artist, muralist, and fabricator based in Austin, TX. Growing up in North Carolina, BLVD discovered his artistic path at a young age. In 2013, BLVD co-created SprATX, an experiential arts agency while simultaneously becoming one of Austin's most

multi-faceted creatives. Over the years he's expanded his style from the infamous cartoon blue teddy bear, to fine art gallery works, to custom fabrication builds for global festivals, to public and street art.

Inspired by the elements of the natural world, color theory, and creating movement through art, his works are one-of-a-kind and highly sought after. Today, BLVD's works can be seen throughout

Austin, TX and beyond. He continues to push the boundaries of his own creativity while building his portfolio partnering with brands like Coca-Cola, Disney, Mercedes, F1, X-Games, SXSW and ESPN.





Heidi Brock, AF&PA President and CEO
Brian McPheely, Global CEO, VISY/Pratt Industries

In 2023, the American Forest & Paper Association (AF&PA) made significant advancements toward addressing critical industry priorities. We worked collaboratively as members of the association and with key stakeholders on several issues including the cumulative regulatory burden, sustainability, recycling and free and fair trade. Our work centered on 3 core areas of focus:

- Advance a safe, nimble, diverse and effective organization.
- Position our industry as leading manufacturers of safe, sustainable and essential materials for the circular economy.
- Successfully achieve priority public policy outcomes.

We also celebrated our 30th anniversary. As we reflect on the work we accomplished over the past year, let's also pause to reflect on our **'30 Years of Advocacy'**. The work we do would not be possible without your active engagement and dedicated partnership.

Our members are committed to safety and sustainability, manufacturing essential products that millions of people rely on every day. We demonstrate this commitment through our *Better Practices, Better Planet 2030* initiative. This year, we recognized 8 outstanding projects through our Sustainability Awards, highlighting leadership and innovation in sustainability, and diversity, equity and inclusion.

AF&PA's 30-year celebration is one milestone in a long legacy of effective advocacy. We are proud of our history, energized by the accomplishments of the past year and ready for the challenges and opportunities that lie ahead.

Cheers to '30 Years of Advocacy' and we look forward to the many years of partnership ahead!

Heidi Brock
AF&PA President and CEO

Brian McPheely
Global CEO, VISY/Pratt Industries

Advocating for a Strong, Sustainable Industry

AF&PA represents those who make the essential paper and wood products Americans use every day. We advocate for a strong and sustainable U.S. paper and wood products industry. Our team delivers fact-based public policy and marketplace advocacy. This year, we advocated on a broad range of priority issues, celebrating a key win: **no new Extended Producer Responsibility (EPR) legislation passed in 2023!**

“The paper copy is insurance. Some workers just prefer the feel and focus paper provides.”

- The Washington Post

KEY HIGHLIGHTS IN 2023

- Maintained biomass carbon neutrality appropriations rider
- Supported SHIP IT Act
- Washington polychlorinated biphenyls (PCB) legislation passed without ban language
- California receipts bill failed to advance in 2023
- Secured veto on California AB 246 to ensure access to menstrual products
- Secured veto in New York to reinforce industry's commitment to sustainable forestry and maintain circular supply chains
- Met with U.S. Trade officials to raise concerns about European Union Regulation on deforestation-free products (EUDR)



Heidi Brock was named one of the 500 Most Influential People shaping policy in 2023 by Washingtonian Magazine.

INFORMING POLICYMAKERS: ADVOCATING FOR SUSTAINABLE REGULATIONS



Tim Hunt testified on behalf of AF&PA and the American Wood Council at a House Energy & Commerce committee hearing on EPA's proposed PM2.5 rule. We emphasized the progress the industry has made and the risk of blocking projects with stricter standards.

PARTNERING WITH MANUFACTURING ALLIES TO AMPLIFY OUR VOICE

AF&PA joined the National Manufacturers Association 'Manufacturers for Sensible Regulation' coalition, calling on the administration to curb the overwhelming amount of federal regulations with unprecedented cost to U.S. manufacturers.



The NAM @ShopFloorNAM · Jun 22, 2023

Today, the NAM launched Manufacturers for Sensible Regulations. According to the NAM's latest Outlook Survey, more than 63% of manufacturers report spending more than 2,000 hours per year complying with federal regulations. Read more from @politico. politico.com/newsletters/po...

“131 manufacturing organizations ask the Biden White House to stop an unprecedented regulatory ‘onslaught’”

- Fox News

30th Anniversary Reflection
2007: Defeated 'cap and trade' legislation in 13 states.



ROBUST GRASSTOPS ADVOCACY

In 2023, AF&PA strengthened relationships with members of Congress and policy influencers. AF&PA was proud to host the Pulp and Paperworkers' Resource Council (PPRC) for their annual fly-in where the group made more than 550 visits with officials. AF&PA's member company CEOs also met with Congressional leaders and representatives from the Environmental Protection Agency. And we championed the industry's sustainability leadership on Capitol Hill at our Government Affairs Advocacy Day during National Forest Products Week.



Leading Manufacturers for the Circular Economy

The paper and wood products industry has an inherently circular supply chain, from the replanting of trees that supply fiber and enhance the environment to recycling paper and packaging that is turned into new products. Our members are committed to advancing the circular economy through our *Better Practices, Better Planet 2030* sustainability goals. AF&PA partners throughout the value chain and with key stakeholders to strengthen the role paper and paper packaging play in the circular economy.

“The paper industry continues to outshine all other materials in terms of recyclability...”

- Politico Long Game Newsletter



POSITIONING PAPER RECYCLING SUCCESS AT FTC GREEN GUIDES WORKSHOP

AF&PA's Brian Hawkinson participated in a Federal Trade Commission (FTC) workshop, “Talking Trash at the FTC: Recyclable Claims and the Green Guides,” to highlight the current state of paper recycling in the U.S. and how consumers perceive recycling claims.

KEY HIGHLIGHTS IN 2023

- Revised paper industry Product Category Rules for pulp, containerboard, paperboard, tissue and printing paper
- Weighed in with CalRecycle on definitions used in the Recycling Rate Determination
- AF&PA's Executive Director, Recovered Fiber, Brian Hawkinson was a contributing editor for The Sustainable Packaging Coalition's Introduction to Paper Packaging Recyclability Test Methods and Specifications
- Contributed to FTC Green Guides revision to reflect the sustainability and recyclability of paper and paper products

PAPER RECYCLING: THE GIFT THAT KEEPS ON GIVING

Our industry has maintained continuously high paper recycling rates for more than a decade. In 2022, the paper recycling rate was nearly 68%, holding approximately stable to the 2021 rate.



recycling matters

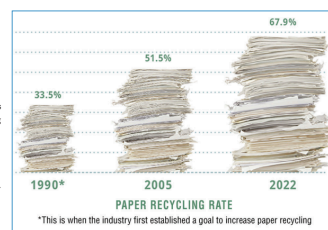


America's Paper Recycling System Remains Strong

Effective recycling policy requires understanding issues with EPR.

By Heidi Brock, President and CEO, AF&PA

It should be clear to policymakers and policy stakeholders around the country that America's paper recycling system is strong and delivers results. Yet, this recycling success story is at risk. In recent years, interest in developing new recycling policy has grown. Attempts to make sweeping changes to recycling policy and improve recycling infrastructure have risen to the top of agendas in several state legislatures around the country. These proposals typically show up in the form of extended producer responsibility (EPR) proposals. What is EPR? It is an environmental policy concept that requires brand owners, producers, and material manufacturers to manage end-of-life costs of recyclable products. In theory, EPR is designed to improve recycling for products that are difficult to recycle, or without strong end markets. EPR programs are not a new concept. In many instances, there are programs to recycle materials like batteries, paint, electronics and mattresses. EPR programs can be effective when products are difficult to process or have low recycling rates. However, this doesn't apply to paper and paper-based packaging in the U.S. Yet many recent EPR proposals are trying to take a “one-size-fits-all” solution to recycling challenges. This approach fails to differentiate between materials



with strong recycling rates and healthy end markets – like paper.

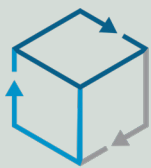
Lawmakers must use data for a more targeted approach. This helps to ensure recycling policies improve hard-to-handle materials, and do not set back paper recycling's success.

Recently released data from American Forest & Paper Association indicates the paper recycling rate remains strong – nearly 68% in 2022. Furthermore, America's recycling rate for old corrugated containers (OCC), or cardboard, was 93.6%, reinforcing the status of paper and paper products as one of the most-recycled materials in the U.S.

A key contributor to this success is widespread and convenient access to community paper and paperboard recycling programs. 98% of Americans have access to these programs through either curbside or drop-off collection.

These recycled fibers go on to become new and sustainable paper products in the circular economy. Last year, roughly 50 million tons of paper and paper-based packaging were recovered for recycling. That amount could fill rail cars stretching from New York to Los Angeles nearly 3 times.

Our industry understands what it means to be a responsible producer. AF&PA members operate more than



Student Design Challenge

FOSTERING INNOVATION THROUGH THE STUDENT DESIGN CHALLENGE

This year's Paperboard Packaging Alliance Student Design Challenge asked students to design sustainable paperboard alternatives for personal care items typically packaged in plastic. This year's finalists included:

- 1ST** University of Wisconsin-Stout – Triangular Paperboard Lip Balm
- 2ND** California Polytechnic State University – SunEase (2nd Place and People's Choice Award)
- 3RD** University of Wisconsin-Stout – Luxora Solid Shampoo Bar and Display



Scan the QR code to see all of the innovative designs showcased from the 2023 challenge

30th Anniversary Reflection
1993: **AF&PA** set its first paper recovery goal to reach 40% by 1998.



PAPER MEETS LIVE! 2023

Co-hosted by AF&PA and the National Paper Trade Association, more than 300 attendees from 94 companies connected with business partners to discuss industry trends, celebrate achievements and enhance career-building skills. Highlights of 2023 included the presentation of the Stanley O. Styles Industry Excellence Award to Greg Gibson, Senior Vice President, Commercial Excellence at Sylvamo. AF&PA's Vice President of Communications, Lindsay Murphy, delivered the keynote address: "Engaging Policy Influencers through Dynamic Communication Strategies."

CORRUGATED PACKAGING ALLIANCE (CPA)

LIFE CYCLE ASSESSMENT OF U.S. AVERAGE CORRUGATED PRODUCT 2020

PREPARED BY:

- National Council for Air and Stream Improvement
- Anthesis

THIRD PARTY REVIEW BY:

- The Athena Institute
- Lindita Bushi

October 2, 2023

CORRUGATED LIFE CYCLE ASSESSMENT

The Corrugated Packaging Alliance released the 2020 Life Cycle Assessment for Corrugated Packaging. The study shows improvements in reducing the environmental impact of corrugated cardboard boxes, including a **50% reduction in greenhouse gasses** between 2006 and 2020. The study by Anthesis and the National Council for Air and Stream Improvement looked at everything involved in making a typical corrugated box in the U.S. in 2020. From getting the materials, making the box, shipping it, using it and throwing it away.

"Life Cycle Assessment Reinforces Corrugated Packaging Industry's Sustainability Leadership"

– American Recycler

Achieving Public Policy Outcomes

AF&PA advances policies that help our industry grow, create jobs and foster global market competition so we can continue to provide our essential, sustainable products. In 2023, our policy priorities focused on safety, sustainability, product stewardship and advancing the circular economy. Our engagement with the Administration and Congress, and support from allied industry and academics, resulted in significant progress across a broad set of issues.

This year, we engaged on multiple fronts to address the regulatory burden of several major pending regulations. Our policy team highlighted the significant regulations' impacts to the paper industry and we partnered with manufacturing stakeholders and government agencies to identify solutions that will help achieve our shared sustainability goals.

“New air quality standards will stifle manufacturing industry”

- The Detroit News

• **45+ COMMENTS FILED**

• **12+ AGENCY OFFICES ENGAGED**

KEY HIGHLIGHTS IN 2023

- EPA determined to not prioritize pulp and paper mills for PFAS ELG water regulation
- Avoided unintended outcomes in Washington state polychlorinated biphenyls (PCBs) pollution prevention legislation
- Negotiated settlement with Washington State Department of Ecology that would have banned thermal papers containing Bisphenol S (BPS)
- The EPA decided not to tighten the Ozone National Ambient Air Quality Standards (NAAQS)
- Prevented final Good Neighbor Plan from covering biomass boilers, recovery furnaces and lime kilns
- EPA dropped proposed restrictions on burning Paper Recycling Residuals for energy recovery which would have cost the industry \$30M/year
- Developed cost-benefit analysis for AF&PA and coalition members and partnered with allies to engage in ongoing dialogue on CERCLA PFAS Listing Proposed Rule
- Developed innovative approach for efficient implementation for Particulate Matter NAAQS Proposed Rule
- Developed cost-benefit arguments for AF&PA and coalition partners on Tribal Treaty Rights Rule and Washington Human Health Water Quality Criteria Final Rule and engaged in dialogue about potential compliance solutions
- Developed cost-benefit arguments for the U.S. Securities and Exchange Commission (SEC) Climate Disclosure Proposed Rule
- Wrote comments and raised concerns on Federal Acquisition Regulation Council GHG Rule for Federal Contractors
- Engaged in Non-Hazardous Secondary Materials dialogue including cost-benefit argument for coalition
- Based on AF&PA and other coalition comments, EPA declined to expand permitting obligations on smaller projects at mills
- Developed response to University of Florida study to clarify PFAS is not used in U.S. manufacturing of tissue products



INFORMING POLICYMAKERS: ADVOCATING FOR SUSTAINABLE REGULATIONS

AF&PA's Paul Noe testified on the "Good Neighbor" Rule before the Senate Environment & Public Works committee in March. The testimony drew attention to the need for sustainable regulations and AF&PA continues to engage with EPA on the cumulative regulative burden challenge.

30th Anniversary Reflection
2010: Developed an unprecedented multipronged campaign to change EPA's proposed Boiler MACT regulation and reduce member cost.

Prioritizing the Safety of Our Essential Workforce

Safety excellence is a top priority for AF&PA and our member companies. “Goal Zero” is more than a target — it’s a mindset. AF&PA facilitates the exchange of information among members as part of our commitment to helping members reduce serious injuries and fatalities (SIFs). In 2019, AF&PA launched a voluntary SIF prevention program for member companies.

31 member companies participated in our voluntary SIF prevention program in 2023. As part of the program, we sponsor webinars and workshops aimed at information sharing to help prevent SIFs and make them available to our membership.

AF&PA HOSTS 8TH ANNUAL SAFETY WORKSHOP

Members engaged in meaningful dialogue and collaboration at our **8th Annual Safety Workshop**, focused on mental health and well-being, the use of artificial intelligence in workplace safety and prevention of serious injuries and fatalities (SIFs). Representatives from the Occupational Safety and Health Administration (OSHA) and the United Steel Workers (USW) joined us to share key insights about the current state of workplace safety.



30th Anniversary Reflection
2016: AF&PA members surpassed our workplace safety goal ahead of schedule.



Furthering Industry Sustainability Leadership

“Paper producers beat the circularity drum”

-Recycling Today

Better Practices, Better Planet is one of the longest-standing sustainability initiatives for a U.S. manufacturing industry, established more than a decade ago. Helping achieve our *Better Practices, Better Planet 2030* (BPBP2030) goals is a condition of membership and demonstrates our members' continued commitment to sustainability.

In 2023, we began a pilot program for AF&PA's sustainable water management tools and facilitated member discussions to help set AF&PA's goal to reduce Scope 3 greenhouse gas emissions. AF&PA will publish its next sustainability report in 2024 with progress toward the new goals for 2030.

2030 GOALS

- Reduce Greenhouse Gas Emissions
- Advance a Circular Value Chain
- Strive for Zero Injuries
- Advance Sustainable Water Management
- Advance More Resilient U.S. Forests



AF&PA's *Better Practices, Better Planet* initiative was recognized with an ASAE 'Power of Associations' Silver Award.

STRENGTHENING GLOBAL PARTNERSHIPS

AF&PA traveled to Amsterdam for the International Council of Forest & Paper Associations (ICFPA) Annual Meeting and CEO Roundtable and participated in the 64th Advisory Committee on Sustainable Forest-based Industries (ACSFI) Meeting. Leaders from across the globe convened to discuss policy priorities and progress on sustainability commitments. Heidi Brock, ICFPA Vice President was joined by Helen Mets, President and CEO of Ahlstrom for the ICFPA CEO Roundtable to discuss with other global leaders how associations play a role in addressing industry challenges and opportunities, increasing the circularity of products and attracting young talent to the workforce. Brock also presented the ICFPA 2023 Sustainability Progress Report which highlights global progress made toward sustainability commitments.



Scan the QR code to hear from the 2023 AF&PA Sustainability Award Winners

CELEBRATING AWARD WINNING SUSTAINABILITY PROJECTS

In 2023, AF&PA received a record number of applications for awards: 32 applications from 15 member companies. Our BPBP2030 award winners were announced at AF&PA's Presidents Forum held this year in Austin, Texas. Congratulations to the following companies:

- **Leadership in Sustainability – Safety**
Georgia-Pacific LLC: Save My Life Digital Work Process
- **Leadership in Sustainability – Circular Value Chain**
Graphic Packaging International, LLC: Boardio™ Paper-based Packaging
- **Leadership in Sustainability – Water Management**
Sappi North America: Cloquet Mill Effluent TSS Reduction Project
- **Leadership in Sustainability – Greenhouse Gas Reductions**
Sonoco Products Company: Renewable Natural Gas Project
- **Leadership in Sustainability – Resilient U.S. Forests**
International Paper: Promoting Forest Bird Awareness and Conservation
- **Innovation in Sustainability**
Seaman Paper: Vela™ Bags for Transport Packaging
- **Innovation in Sustainability**
Ahlstrom: PawPrint® Sustainable Pet Food Packaging
- **Diversity, Equity and Inclusion**
The Procter & Gamble Company: P&G Paper Equity and Inclusion



ICFPA also recognized its 2022-2023 Blue Sky Young Researchers Innovation Award winners at the event. The top 3 finalists, Ivana Amorim Dias from Brazil, Ilona Leppänen from Finland and Leane Naude from South Africa, gave presentations on their award-winning work.

30th Anniversary Reflection
2002: AF&PA led formation of the ICFPA to include 40 nations and served as first president.

Fostering Informed Policymaking

AF&PA public policy and advocacy efforts are fact-driven. Statistics and data are the foundation of our work. AF&PA's StatMill™ is a resource that provides members with access to timely statistical reports and analysis. In 2023, national media used AF&PA data for stories about supply chain and paper recycling.



58
Statistical Reports

2,238 Downloads

"There's one simple reason why paper is still popular. A growing global population means people need more of the paper-based products we've always needed..."

- Slate

BUILDING CONNECTIONS & CELEBRATING INVESTMENTS

Member facility and mill tours are critical to building knowledge, strengthening relationships and informing policy influencers. AF&PA staff connected with members through **6 member company tours** in 2023. We also celebrated industry investments, attending ribbon cuttings for new and upgraded facilities.





ENGAGING MEMBERS & KEY AUDIENCES

AF&PA staff participated in more than **20 speaking engagements** in 2023 including, Resource Recycling Conference, NCASI's Annual Conference, AICC Annual Meeting, Buzz Advocacy Summit and RISI ICC Conference.

Engaging Policy Stakeholders

TOP PERFORMING CONTENT

Our content strategy includes a mix of tactics including earned, organic and paid media. In 2023, AF&PA's paid campaigns **exceeded industry benchmarks**, helping us secure key victories on advocacy issues in states across the U.S. We also reached target audiences to inform on the regulatory burden and about the importance of maintaining paper options for critical documents. AF&PA's website content strategy led to a **36% increase in search engine visibility**.

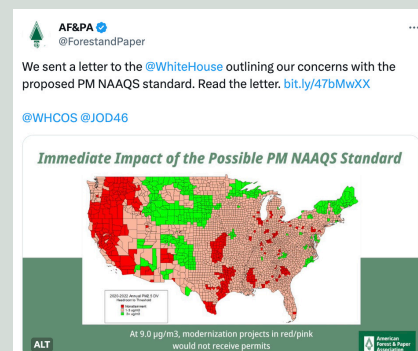
- **13,192 MEDIA MENTIONS** –
6% INCREASE COMPARED TO 2022
- **205,081 ORGANIC WEBSITE VISITS** –
37% INCREASE COMPARED TO 2022
- **3,600+ SUBSCRIBERS**
FOR AF&PA DELIVERED

Our 2023 e-commerce campaign generated more than **7.6 million impressions** and **95,000 engagements**, garnering almost **39,000 clicks**. States with the highest click through rates included California, Connecticut and Massachusetts.

We ran a digital campaign to complement our advocacy efforts on EPA's plan to lower National Ambient Air Quality Standards (NAAQS) for particulate matter (PM). Our ads garnered **2.4 million impressions** and more than **8,700 clicks**.

We reached policy influencers in New York and Washington state to inform about extended producer responsibility (EPR) and the success of paper recycling. Our EPR campaigns generated **more than 2.5 million impressions** and garnered **more than 24,000 clicks**.

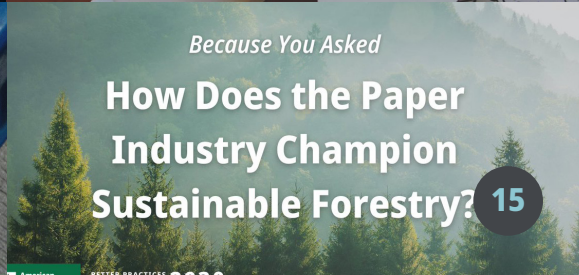
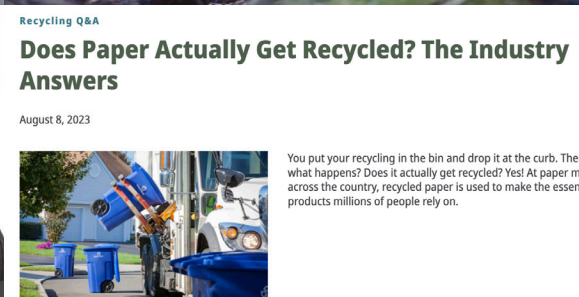
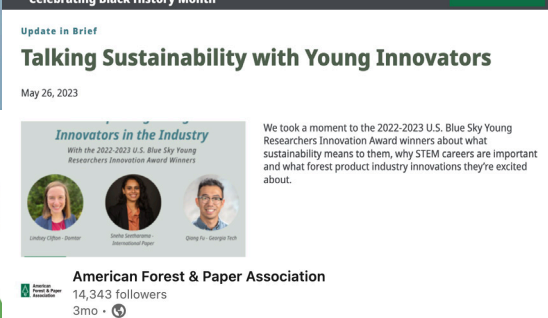
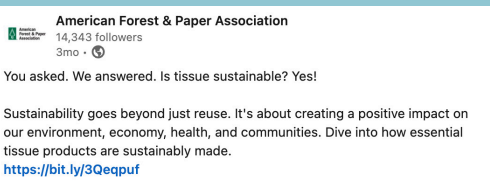
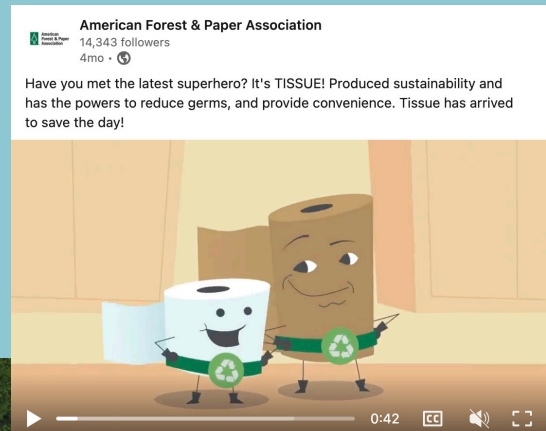
30th Anniversary Reflection
2021: AF&PA redesigned
and relaunched its
newsletter AF&PA Delivered.



Amplifying Our Industry's Voice

SIMPLIFYING COMPLEX TOPICS

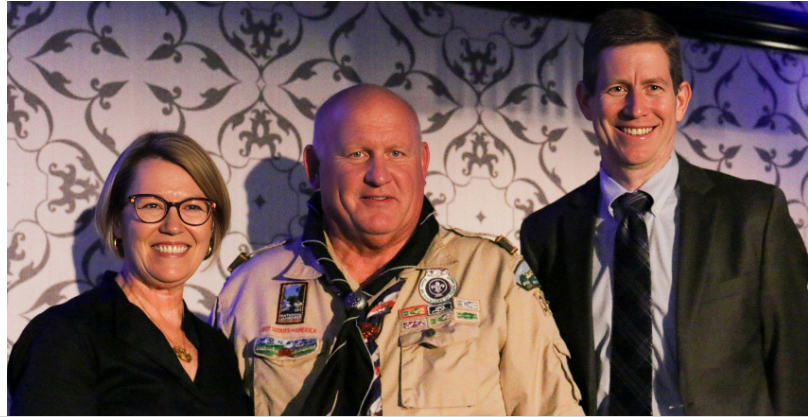
In 2023, we continued to advance the industry's mission for a sustainable future through effective, concentrated and simplified web content. A popular format on AF&PA's blog is our Recycling Q&A which continues to drive traffic to our website. We also use interview style questions and answers with industry experts to help break down complicated topics like the circular economy, sustainability and extended producer responsibility.



Adding Value to the Association Community

RECOGNIZING OUTSTANDING CONTRIBUTIONS & ACHIEVEMENTS

Heidi Brock was recognized by the Capitol Area Boy Scouts of America with the John H. Graham IV Association Executive Award. Congressman Glenn "GT" Thompson was honored as Citizen of the Year. Also joined by Steve Henry, President of Paper and Packaging for Paper Excellence Group.



IN MEMORIAM: STAN LANCEY

It is with heavy hearts we share the news that our friend and colleague Stan Lancey passed away on October 23. Stan served as our Chief Economist. He worked at AF&PA for almost 46 years and was an integral part of our team.

Stan was a gifted problem solver with a strong work ethic. He transitioned from industry reports to public policy work, collaborating on various projects. He was particularly passionate about industry safety and found great meaning in supporting our members in managing the AF&PA Workplace Safety Work Group. He was an industry expert, enjoyed mentoring younger staff and had a great sense of humor. Our staff meetings always included a 'nugget of wisdom' from Stan. He was a kind and calming presence to everyone. Stan will be dearly missed.

AF&PA APPOINTS JULIE LANDRY AS VICE PRESIDENT OF GOVERNMENT AFFAIRS

In May, AF&PA announced Julie Landry as Vice President of Government Affairs. In this role, she leads the paper and wood products industry's legislative agenda and drives advocacy efforts before Congress, the White House and state governments. Landry joined AF&PA as Manager of Government Affairs in October of 2011 and has cultivated extensive experience on issues related to energy, environment, water and forestry. Landry previously worked for the National Association of Convenience Stores (NACS) and began her career on Capitol Hill working for U.S. Senator Saxby Chambliss (R-GA) and later served as Special Assistant to the Policy Director for the House Energy and Commerce Committee.



SHAPING FUTURE ADVOCACY LEADERS

AF&PA was pleased to welcome 3 interns this summer:

- **Sophie Bockman**, James Madison University '25 - Strategic Communications Intern
- **Sarah Calvert**, Michigan State University '25 - Government Affairs Intern
- **Joley Clodfelter**, Purdue University '24 - Public Policy Intern



Scan the QR code to read more about their experiences at AF&PA



GIVING OUR TIME, TALENT & FRIENDSHIP

AF&PA staff took part in volunteer opportunities throughout the year including Everybody Wins DC Book Drive Challenge, DC Central Kitchen and a joint industry event to pack "Period Poverty" kits. AF&PA also hosts regular events for employees to connect and build relationships. Heidi Brock volunteers her time to a number of boards and associations, currently serving as Chair-Elect of ASAE and Chair of the ASAE Research Foundation Board. Heidi also represents AF&PA on the National Association of Manufacturers Council of Manufacturing Associations.





AF&PA PAC

Political Action Committee & Grassroots Advocacy

The AF&PA political action committee (PAC) is the voluntary, non-partisan group representing the forest products industry. In 2023, we **raised \$175,000** for the AF&PA PAC to support our industry champions in their upcoming races.



\$175,000
raised in 2023

100%

**AF&PA Board
Participation**



AF&PA PAC Thank You Breakfast Speaker, A.B. Stoddard, Columnist at The Bulwark with AF&PA Board Chair Brian McPheely, AF&PA PAC Co-Chair Christian Fischer and Heidi Brock.

THANK YOU TO OUR 2023 PAC CONTRIBUTORS

2023 PLATINUM CLUB (\$10,000 HOUSEHOLD CONTRIBUTION)

Howard and Rhonda Coker • Mark and Sue Kowlzan

2023 GOLD CLUB (\$5,000 CONTRIBUTION)

Heidi Brock • Dick Carmical • Mike Doss • Christian Fischer • Charlie Hodges
Brian Janki • Arsen Kitch • Dan Kraft • Jonathan Kraft • Robert Kraft • Will Kress
Brian McPheely • Colin Moseley • David Sewell • Mark Sutton • Kenneth Wallach
John Williams

2023 SILVER CLUB (\$2,500 CONTRIBUTION OR MORE)

Craig Anneberg • John Carpenter • Mike Haws • Julie Landry • Jean-Michel Ribieras
Richard Verney • Elizabeth VanDersarl

2023 CONTRIBUTORS (\$1,000 OR MORE)

Michael Farrell • Steve Henry • Kathryn Hodges • Bryan Hollenbach
Lindsay Murphy • Paul Noe • Darla Olivier • Steve Scherger • Andrew Topps
Terry Webber • Sheila Weidman

2023 COMPANY PAC CONTRIBUTORS

Graphic Packaging International PAC • International Paper PAC
Resolute Forest Products PAC • Sylvamo PAC • WestRock PAC

2023 COMPANY EMPLOYEE CONTRIBUTORS

Elizabeth Bartheld • Maggie Bidlingmaier • Brian Davison • Ricardo De Genova
Ivan Dremov • Cathy Foley • Clive Gillanders • Regina Gray • Andy Johnson
Seth Kursman • Sarah Manchester • Rick McLeod • Vish Narendra
Ole Rosgaard • Elizabeth Spence • Lauren Tashma • Matt Van Vleet • Joseph Yost

Paper & Packaging Caucus

Originating in the House in 2013 with 50 members, the Caucus expanded membership to include the Senate in 2015. In the 118th Congress, the Caucus is led by Senators Debbie Stabenow (D-MI) and John Boozman (R-AR) in the Senate and Representatives Lou Correa (D-CA) and Dan Newhouse (R-WA) in the House of Representatives. Paper & Packaging Caucus members host educational events throughout each year and promote the forest products industry during National Forest Products Week - recognized during the third week of October.



AF&PA welcomed new House Paper & Packaging Caucus Co-Chairs for 118th Congress, Reps. Dan Newhouse (R-WA-4) and Lou Correa (D-CA-46).

SENATORS

Tammy Baldwin, D-Wisconsin
Marsha Blackburn, R-Tennessee
John Boozman, Co-Chair, R-Arkansas
Shelley Moore Capito, R-West Virginia
Susan Collins, R-Maine
Tom Cotton, R-Arkansas
Cindy Hyde-Smith, R-Mississippi
Angus King, I-Maine
Amy Klobuchar, D-Minnesota
James Risch, R-Idaho
Tina Smith, D-Minnesota
Debbie Stabenow, Co-Chair, D-Michigan
Roger Wicker, R-Mississippi

REPRESENTATIVES

Rick Allen, R-GA-12
Brian Babin, R-TX-36
Jim Baird, R-IN-4
Sanford Bishop, D-GA-2
Julia Brownley, D-CA-26
Buddy Carter, R-GA-1
Lou Correa, Co-Chair, D-CA-46
Chuck Fleischmann, R-TN-3
Mike Gallagher, R-WI-8
Jared Golden, D-ME-2
Paul Gosar, R-AZ-4
Morgan Griffith, R-VA-9
Glenn Grothman, R-WI-6

Brett Guthrie, R-KY-2
French Hill, R-AR-2
Richard Hudson, R-NC-8
John Joyce, R-PA-13
Mike Kelly, R-PA-16
Derek Kilmer, D-WA-6
Ann Kuster, D-NH-2
Bob Latta, R-OH-5
Daniel Meuser, R-PA-9
Greg Murphy, R-NC-03
Richard Neal, D-MA-1
Dan Newhouse, Co-Chair, R-WA-4
Ralph Norman, R-SC-5
Scott Perry, R-PA-4

Mark Pocan, D-WI-2
Guy Reschenthaler, R-PA-14
David Rouzer, R-NC-7
John Rutherford, R-FL-4
Austin Scott, R-GA-8
Jason Smith, R-MO-8
Pete Stauber, R-MN-8
Elise Stefanik, R-NY-21
Glenn Thompson, R-PA-5
Mike Turner, R-OH-10
Bruce Westerman, R-AR-4
Rob Wittman, R-VA-1



AF&PA Welcomes New Members in 2023

New Company Members:



New Associate Members:



Streco Fibres, Inc.

Key Statistics:

87% U.S. pulp, paper and paperboard capacity*

123 companies and associations represented

*Capacity based on AF&PA's 38 Company Members

AF&PA Members

AF&PA Company Members

Ahlstrom
Billerud Americas Corporation
BiOrigin Specialty Products
Clearwater Paper Corporation
Domtar/Resolute Forest Products/Paper Excellence
DS Smith
Essity
Georgia-Pacific LLC
Graphic Packaging International, LLC
Green Bay Packaging Inc.
Greif, Inc.
Hollingsworth & Vose Company
Hood Container Corporation
International Paper
Johnson Timber Corporation
Kimberly-Clark Corporation
Marcal Paper Company
Masonite Corporation
Monadnock Paper Mills, Inc.
New-Indy Containerboard, LLC
Nippon Dynawave Packaging Company, LLC
North Pacific Paper Company, LLC
Ox Industries
Packaging Corporation of America
Pactiv Evergreen Inc.
PaperWorks Industries, Inc.

Pratt Industries, Inc.
The Price Companies Inc.
The Procter & Gamble Company
Rand-Whitney
Sappi North America
Seaman Paper Co. of Massachusetts, Inc.
Simpson Lumber Company, LLC
Smurfit Kappa North America
Sonoco Products Company
Sylvamo Corporation
TimberWest Forest Corp.
WestRock Company

AF&PA Association Members

AICC, The Independent Packaging Association
Alabama Forestry Association
Alabama Pulp & Paper Council
Alaska Forest Association
APA-The Engineered Wood Association
Arkansas Forest & Paper Council
Arkansas Forestry Association
Associated Oregon Loggers, Inc.
California Forestry Association
Carton Council of North America, Inc.
Cedar Shake and Shingle Bureau
Composite Panel Association
Decorative Hardwoods Association
Empire State Forest Products Association
Envelope Manufacturers Association
Fibre Box Association
Florida Forestry Association
Forest Resources Association, Inc.
Forestry Association of South Carolina
Georgia Forestry Association
Idaho Women in Timber
Intertribal Timber Council
Louisiana Forestry Association
Louisiana Pulp & Paper Association
Lumbermen's Association of Texas & Louisiana
Massachusetts Forest Alliance
Michigan Forest Products Council
Minnesota Forest Industries, Inc.
Mississippi Forestry Association
Missouri Forest Products Association
Montana Logging Association
Montana Women in Timber
Montana Wood Products Association
New Hampshire Timberland Owners Association
North American Wholesale Lumber Association
North Carolina Forestry Association
Northeastern Logger's Association
Northeastern Lumber Manufacturers Association
Northwest Pulp & Paper Association
The Ohio Forestry Association, Inc.
Oregon Forest & Industries Council
Oregon Women in Timber
Paper Receipts Converting Association
Paper Shipping Sack Manufacturers' Association, Inc.
Paperboard Packaging Council
Recycled Paperboard Technical Association
Southeastern Lumber Manufacturers Association
Technical Association of the Pulp & Paper Industry (TAPPI)
Tennessee Forestry Association
Texas Forestry Association

Virginia Forest Products Association
Virginia Forestry Association
Washington Forest Protection Association
Wisconsin Paper Council
Wood I Joist Manufacturers' Association

AF&PA Associate Members

Adams and Reese LLP
ANDRITZ
Arandell Corporation
Boston Consulting Group
Canusa Paper & Packaging
Central National Gottesman Inc.
CR Meyer
Dart Container Corporation
Dixie Pulp & Paper, Inc.
Evergreen Fibres, Inc.
Footprint
The Greenbrier Companies
Hallmark Cards, Inc.
Iconex
Koch Companies Public Sector, LLC
NOVOLEX
PAC Worldwide
Paper Sales USA, Inc. (Mondi Paper Sales GmbH)
PricewaterhouseCoopers LLP
ProAmpac
Ranpak Corp.
Roosevelt Paper Company
SNF Holding Company
Solenis LLC
Streco Fibres, Inc.
Tetra Pak, Inc.
Thompson Industrial Services, A Clean Harbors Company
Valmet Corporation
Voith Paper, Inc.
Weissenrieder & Co AB

AF&PA Board of Directors

OFFICERS



CHAIR

Brian McPheely,
Global CEO,
Pratt Industries, Inc.



FIRST VICE CHAIR

R. Howard Coker,
President & CEO,
Sonoco Products Company



SECOND VICE CHAIR

David Sewell,
President & CEO,
WestRock Company



IMMEDIATE PAST CHAIR

Christian Fischer,
President & CEO,
Georgia-Pacific LLC

DIRECTORS

Craig Anneberg, CEO, North Pacific Paper Company, LLC

Dick Carmical, CEO, The Price Companies Inc.

John Carpenter, President, Nippon Dynawave Packaging Company, LLC

Michael Doss, President & CEO, Graphic Packaging International, LLC

Tamera Fenske, Chief Supply Chain Officer, Kimberly-Clark Corporation

Regina Gray, Senior Vice President, Product Supply-Family Care, The Procter & Gamble Company

Michael Haws, President & CEO, Sappi North America

Kevin Hayward, CEO, Ox Industries

Steve Henry, President, Paper & Packaging, Domtar/Resolute Forest Products/Paper Excellence

Charles Hodges, President & COO, Hood Container Corporation

Brian Janki, President & CEO, PaperWorks Industries, Inc.

Arsen Kitch, President & CEO, Clearwater Paper Corporation

Mark W. Kowlzan, Chairman & CEO, Packaging Corporation of America

Daniel Kraft, President, International, The Kraft Group LLC

Kevin Kuznicki, President, General Counsel, North America, Billerud Americas Corporation

Remi Lalonde, President & CEO, Resolute Forest Products

F. Colin Moseley, Chairman, Simpson Lumber Company, LLC

Byron Racki, President, Beverage Merchandising, Pactiv Evergreen Inc.

Jean-Michel Ribieras, Chairman & CEO, Sylvamo Corporation

Ole Rosgaard, President & CEO, Greif, Inc.

Mark Sutton, Chairman & CEO, International Paper Company

Mark Ushpol, Executive Vice President, Food & Consumer Packaging, Ahlstrom

John D. Williams, President & CEO, Domtar

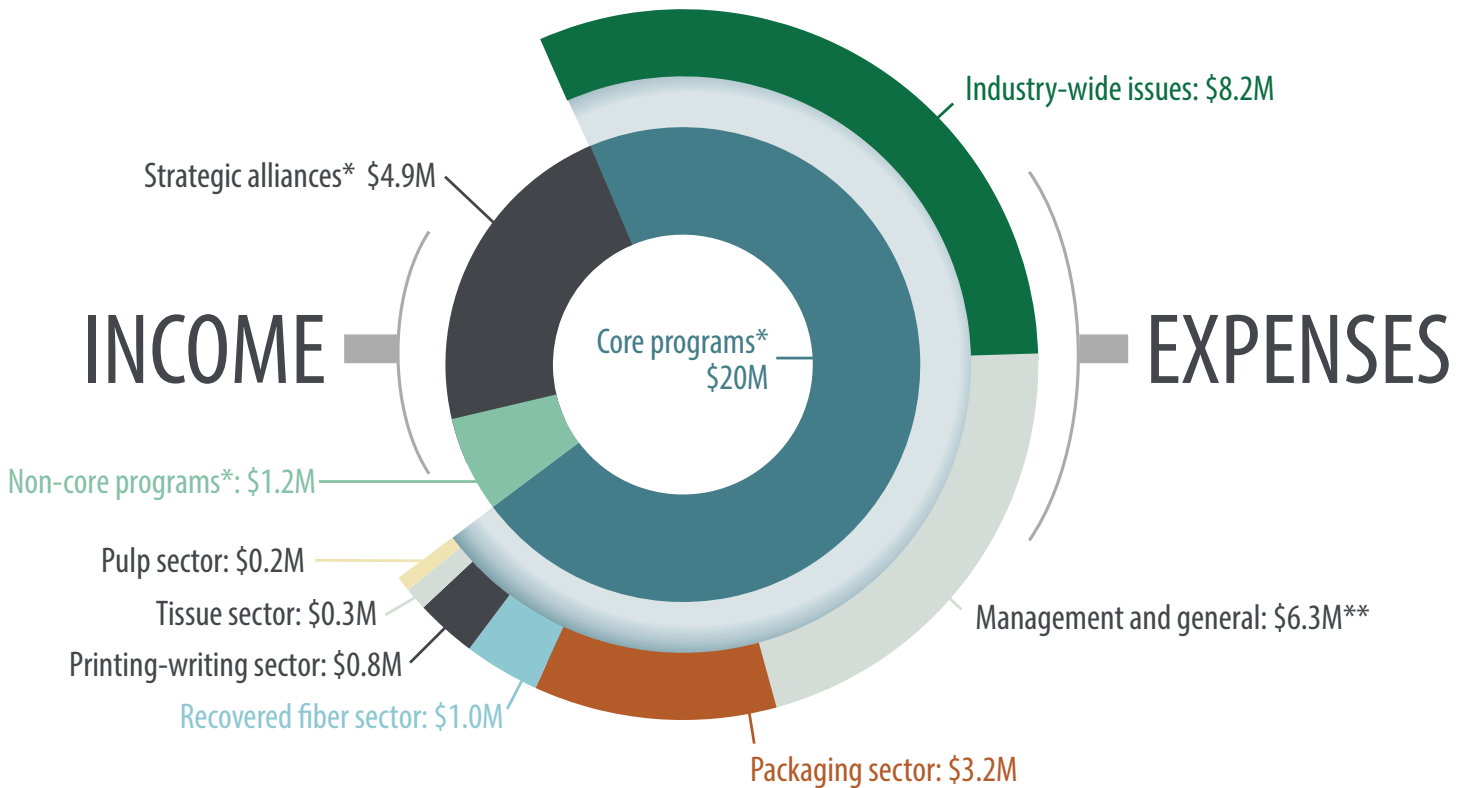
**All board members listed were elected or effective in 2023*

Financials

2023 BY THE NUMBERS

Provisional financial report as of January 24, 2024

Overall program spending \$26.1 Million



*Strategic alliances and non-core programs include voluntary funded strategic initiatives work

**Offset by \$555,979 in association management income



OUR MISSION

Advance a sustainable U.S. pulp, paper, packaging and wood products manufacturing industry through fact-based public policy and marketplace advocacy.

OUR VISION

- I Bring together members, strategic alliances, and other stakeholders to promote solutions that will advance the industry's sustainability and competitiveness.
- I Provide business and policy decision-making support through research, reports, and industry data collection and analysis.
- I Speak on behalf of AF&PA members to a wide range of audiences with a unified and informed voice.
- I AF&PA and its employees serve as models of competency and productivity in a dynamic economic and political climate.

#30YearsofAdvocacy



1993

Merger of National Forest Products Association and the American Paper Institute formed the **American Forest & Paper Association (AF&PA)**

1994

Began the **Sustainable Forestry Initiative® (SFI®)** program

1995

Launched **Environmental, Health & Safety (EHS) principles**

1996

Defeated all mandatory content, labeling and packaging bans at the state level

1997

EPA Cluster Rule completed, **saving members \$8 billion in capital costs**

1998

Developed **SFI® certification and licensing program**

1999

American Wood Council **re-wrote all wood products code language** for the International Building Code



#30YearsofAdvocacy

2000

Issued first **EHS report** (precursor to today's sustainability report)

2004

Achieved **Boiler and Wood Maximum Achievable Control Technology (MACT) regulations** that were cost-effective and achievable

2001

Won major **U.S. Court of Appeals decision** to limit scope of permits under the Clean Water Act

2005

Won unanimous D.C. District Court ruling upholding the 2002 New Source review, which preserved **savings of over \$1 billion in capital expenditures**

2002

Partnered with U.S. State Department to **eliminate global illegal logging**

2006

AF&PA member companies **reach goal of greenhouse gas intensity reduction of 12%** nearly six years ahead of schedule

2003

Announced partnership with EPA on new **paper recovery goal to reach 55%** by 2012

2007

Joined coalition partners to **defeat 'do not mail' legislation in 15 states**

#30YearsofAdvocacy

2008

Won enactment of legislation to **combat illegal logging** in Farm Bill

2012

Persuaded EPA to **change final Residual Risk rule**, which reduced potential costs from \$900 million to \$5 million

2009

Broke the 60% threshold for paper recovery by reaching 63.6%, achieving our goal ahead of schedule

2013

Prevailed in coated paperboard antidumping case in China

2010

Combined PaperWeek and the National Paper Trade Association (NPTA) Fall meeting to establish single new annual paper event

2014

Created AF&PA's Tissue Sector, expanding the scope of products we represent

2011

Launched *Better Practices, Better Planet 2020* – a comprehensive suite of sustainability goals to be achieved by 2020

2015

Achieved changes to the final Waters of the U.S. rule, exempting most waters on AF&PA member mill property from Clean Water Act jurisdiction

#30YearsofAdvocacy

2016

Implementation of the Clean Power Plan was stayed by the United States Supreme Court at our request through a joint industry litigation coalition

2017

Historic tax reform legislation passed in Congress that achieved AF&PA's priorities

2018

Influenced SEC Final Rule on disclosure requirements for mutual fund investments to maintain delivery in paper format until 2021

2019

Launched AF&PA's Voluntary Serious Injury & Fatality (SIF) Prevention Program

2020

Secured "Essential Worker" designation for our industry and supply chain to continue producing critical products throughout the COVID-19 pandemic

2021

Launched *Better Practices, Better Planet 2030* – a new set of sustainability goals to achieve by 2030

2022

Reached 68% paper recycling – a rate on par with our highest record achieved

2023

Celebrated our 30th anniversary




**American
Forest & Paper
Association**


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afandpa.org

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