

20  
24



## YEAR IN REVIEW

Grounded in Purpose,  
Guided by Vision



American  
Forest & Paper  
Association

# Value of an industry voice joined in a common mission

In 2024, the American Forest & Paper Association (AF&PA) grew membership and made remarkable progress in addressing the most pressing priority issues for our industry. We forged strong collaborations within our association and with key stakeholders to strengthen U.S. manufacturing and promote the more than 925,000 people who make the essential paper products Americans rely on.

In Washington D.C., our team has been tackling critical issues such as regulatory burden, product stewardship, and ensuring free and fair trade. These efforts lay the groundwork for transformative change across the industry. And they help keep our economy strong, supporting jobs from coast to coast as a top 10 manufacturing sector in 44 states, especially in rural America.

Our work in 2024 centered on 3 strategic pillars:

- Advance a safe, nimble, 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.

Our collective success is further bolstered by the active participation and unwavering commitment of our members. Through our *Better Practices, Better Planet 2030* initiative, we affirm our dedication to the safety of our workers and ensuring the renewable resource that sustains our industry today will continue to do so for generations to come.

Looking ahead, the foundation we built in 2024 will enable us to capture new opportunities to contribute to growth and innovation. As we continue to advocate for strong U.S. pulp, paper, tissue and packaging manufacturing, we will focus on evolving and adapting to the challenges that lie ahead. Together, we will ensure that our industry meets the opportunities of tomorrow with innovative solutions and remains a steadfast leader in manufacturing **sustainable products for a sustainable future**.

Thank you for your partnership!



**Heidi Brock**

AF&PA President and CEO



**Howard Coker**

President and CEO, Sonoco Products Company



*AF&PA's Board Chairs, past and present. From left to right: Colin Moseley (2010), Chairman, Simpson Lumber Company, LLC; Mark Kowlzan (2016 and 2025), Chairman and CEO, Packaging Corporation of America; Howard Coker (2024), President and CEO, Sonoco Products Company; Christian Fischer (2022), President and CEO, Georgia-Pacific LLC; Heidi Brock, President and CEO, AF&PA; Mike Doss (2021), President and CEO, Graphic Packaging International, LLC; and Brian McPheely (2023), Global CEO, Pratt Industries, Inc.*



# Grounded in Purpose, Guided by Vision

In December, AF&PA relocated to a new office in the heart of Washington, DC, at the iconic Homer Building just three blocks from the White House, ensuring that AF&PA's advocacy efforts are front and center in the nation's political landscape.

The Homer Building balances itself as an historic landmark and a modern transportation hub, offering direct access to Metro Center and DC's extensive metro lines.

AF&PA partnered with Fox Architects to create a modern showcase of our industry and products. From the moment you step off the elevator on the 10th floor, you're immersed in the materials that ground our work — tree fiber, recycled materials, textured paper wall coverings, and innovative corrugated millwork. Our purpose and vision are boldly displayed throughout, alongside a unique icon pattern that celebrates the essential products our industry manufactures.

This workspace is purpose-built to drive productivity, foster collaboration and facilitate seamless engagement between members, strategic partners and policymakers.

We invite you to visit us at our new location: 601 Thirteenth Street NW, Suite 1000 N, Washington, DC 20005.

In 2024, AF&PA finalized work with Boston Consulting Group (BCG) to develop a strategic plan to guide the direction of the Association's work. As a key part of this effort, AF&PA introduced a new purpose statement and revised vision statement. This thoughtful process ensures powerful alignment between the organization's long-term goals and core values, creating a clear, unified direction that resonates with both industry stakeholders and the broader community.

## Our Purpose

*Sustainable Products for a Sustainable Future.*

## Our Vision

*Be the most trusted voice for essential U.S. pulp, paper, packaging and wood products manufacturers in our circular economy.*



# Advocating for a Strong, Sustainable Industry

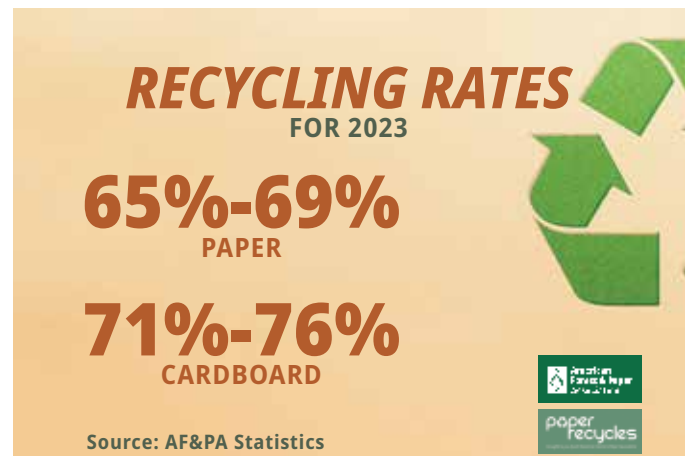
AF&PA works to promote and ensure people have access to essential paper and wood products that meet their everyday needs. We're working with policymakers to advocate for market-driven, industry-led solutions to advance U.S. manufacturing. AF&PA is highly engaged on extended producer responsibility (EPR) in states across the U.S. and in Washington, D.C.

Our work in 2024 resulted in key wins including:

- Defeated EPR legislation in Hawaii, New York, Tennessee and Washington
- Worked on EPR implementation in California, Colorado, Maine, Minnesota and Oregon
- Defeated California bill to ban single use cups in chain restaurants
- Defeated advanced recycling legislation in Alabama

AF&PA's recycling policies are guided by strong data and industry statistics. The 2023 paper recycling rate is the first **using AF&PA's updated methodology**, which utilizes extensive industry data, subject matter expertise and detailed U.S. trade data to account for the continued shift of the U.S. balance of trade towards imports.

The 2023 calculations show that paper remains one of the most highly recycled materials in America, with the industry **recycling nearly 60% more paper today than it did in 1990** when initial recycling rate goals were established.



Statistics and data are foundational to AF&PA's advocacy and public policy efforts. AF&PA's StatMill™ is a resource that provides members with access to timely statistical reports and analysis. Our reports cover monthly, quarterly, semi-annual and annual data about various segments of the pulp and paper industry. Scan the QR Code to learn more!



## Engagement in the States

# 65+

*pieces of testimony and coalition letters*

## Engagement on Capitol Hill

# 215+

*meetings with congressional offices*





## ENGAGE. INFORM. ADVOCATE.

In 2024, AF&PA members and staff connected with members of Congress and policy influencers in Washington D.C. and states across the U.S. AF&PA was proud to host the Pulp and Paperworkers' Resource Council (PPRC) for their annual fly-in where the group met with officials to discuss priority issues from their states and across the industry. AF&PA staff participated in 11 member company facility visits and spoke at more than 35 events. These opportunities allow us to strengthen connections to our people, products and communities.





# Advancing Regulatory Reform to Strengthen U.S. Manufacturing



AF&PA's Vice President, Public Policy, Paul Noe testified before the House Energy and Commerce Committee on the need for EPA to reform its air permit program.



AF&PA serves to advance public policies that foster economic growth, job creation and global competitiveness for a vital sector that makes the essential paper and packaging products Americans use every day. In 2024, AF&PA welcomed a **ground-breaking Supreme Court decision** that ended court deference to agency statutory interpretations and should change the regulatory framework to consider cost.

Our work resulted in **significant cost savings for U.S. pulp and paper mills** including:

- Approximately \$270 million and strengthened the duty of agencies to reasonably respond to comments from a rare stay of EPA's Good Neighbor Plan in *Ohio v. EPA* – added to the \$170 million saved from earlier federal circuit court stays for other states.
- Roughly \$300 million from a DC Circuit Court decision in *U.S. Sugar Corp. v. EPA*, which upheld our Boiler MACT rules based on *Loper Bright*.
- About \$1 billion in avoided costs per integrated pulp and paper mill by securing an exclusion from EPA's final Risk Management Plan Rule.

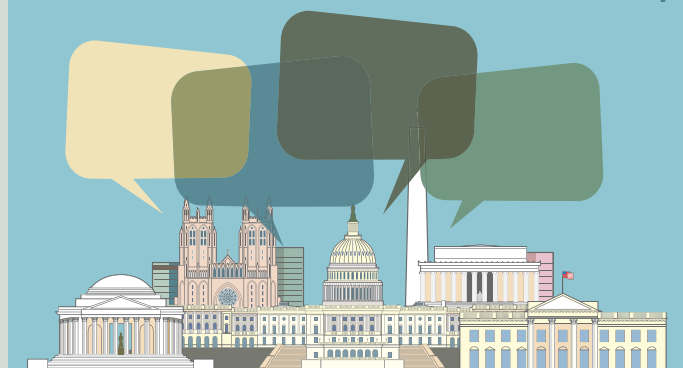
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We hope that this focus on courts' constitutional role to interpret the law, while respecting agency expertise, will lay the foundation for sustainable regulation.

Heidi Brock, President and CEO, AF&PA



More than **55** sets of comments filed,



**13** agency offices engaged

AF&PA worked with agencies to improve and refocus EPA's data collection and permitting programs. We also worked to develop cost-benefit arguments, major question doctrine arguments and other legal arguments for comments and/or industry coalition challenges to many rules. Our advocacy contributed to the withdrawal of two highly problematic federal regulations:

- The Federal Acquisition Regulatory Council's mandatory Greenhouse Gas Goals and Reporting Rule for federal contractors.
- EPA's Baseline Water Quality Standard Rule.

**AF&PA Welcomes SCOTUS Ruling on Good Neighbor and Chevron Deference**

- Paper Advance

# Trade Progress - Secured EUDR Implementation Delay

AF&PA engaged on multiple fronts to garner support from the U.S. Congress, the U.S. Trade Representative, Department of Commerce and Department of Agriculture to urge a delay in the implementation of the European Union Deforestation-Free Products Regulation (EUDR) to avoid trade disruptions. As part of our advocacy, AF&PA detailed concerns with the traceability requirement and emphasized that our industry is not linked to global deforestation and forest degradation and should be considered a “low risk” country.

In December of 2024, the EUDR implementation deadline was delayed by 12 months - until December of 2025. In the new

year, AF&PA continues work with the new Administration to address the trade barriers and ensure EUDR's reporting requirements are proportional to the negligible level of risk the U.S. presents to global deforestation.



## Student Design 2024 Challenge

### CULTIVATING CREATIVITY THROUGH THE STUDENT DESIGN CHALLENGE

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

- 1ST** Pennsylvania College of Art & Design - SPUDS Potatoes
- 2ND** Rochester Institute of Technology - Grovey Garlic
- 3RD** California Polytechnic University - Lively Roots Potatoes



Scan the QR code  
to see all of the innovative  
designs showcased from  
the 2024 challenge



Award winning team from the Pennsylvania College of Art & Design with AF&PA's Manager, Industry Affairs Gabriell Maupin Barr and Smurfit Westrock Student Design Challenge Sponsors: Sam Shoemaker, President of Consumer Packaging (far left) and Laurent Sellier Chief Executive Officer, The Americas (far right).

A fresh starch: A group of six Cal Poly students designed a new way to sustainably package potatoes

- New Times San Luis Obispo

# Expanding Our Voice

## CELEBRATING SUCCESS: AF&PA AWARDED FOR INNOVATIVE COMMUNICATIONS TACTICS

AF&PA's efforts to amplify our industry's policy positions and engage key stakeholders earned several awards:

- 2024 Association Executive of the Year, Heidi Brock: Association TRENDS CEO Update
- Gold ASAE Power of Associations Award: 'Advancing a Safety Culture in Paper Manufacturing'
- Silver ASAE Power of Associations Award: 'Paper Packaging Recycling: The Gift That Keeps on Giving'
- Platinum Viddy Award: 'The Unsung Hero: Tissue Products'
- Platinum Viddy Award: 'Paper Recycling: The Gift That Keeps on Giving'
- Gold Trendy Award: Tissue Box Advocacy Leave-Behind
- Drum Awards Finalist: Search-first Strategy

## STRENGTHENING OUR DIGITAL INFLUENCE

AF&PA's search-first strategy has led to an increase in our industry's visibility and helped maximize our voice on priority issues. In 2024:

**8%** increase in social media followers from 2023

**38%** increase in search engine visibility

**3.8%** average social media engagement rate (above benchmark)

**456,000+** website views, a **40%** increase over 2023

**1637** ranked keywords, a **94%** increase since December 2023







# 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 2024, we raised \$157,000 for the AF&PA PAC to support our industry champions in their upcoming races.



*AF&PA PAC Thank You Breakfast Speaker, Bruce Mehlman, Partner at Mehlman Consulting with AF&PA Board Chair Howard Coker, AF&PA PAC Co-Chairs Brian McPheely and Mike Doss and AF&PA President and CEO, Heidi Brock.*

### THANK YOU TO OUR 2024 PAC CONTRIBUTORS

#### 2024 PLATINUM CLUB (\$10,000 HOUSEHOLD CONTRIBUTION)

Howard and Rhonda Coker • Mark and Sue Kowlzan

#### 2024 GOLD CLUB (\$5,000 CONTRIBUTION)

Heidi Brock • Dick Carmical • Mike Doss • Christian Fischer • Charlie Hodges • Arsen Kitch  
Dan Kraft • Jonathan Kraft • Robert Kraft • Will Kress • Brian McPheely • Colin Moseley  
Laurent Sellier • Andy Silvernail • Mark Sutton • Ken Wallach

#### 2024 SILVER CLUB (\$2,500 CONTRIBUTION OR MORE)

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

#### 2024 CONTRIBUTORS (\$1,000 OR MORE)

Michael Farrell • Seth Kursman • Lindsay Murphy • Paul Noe • Darla Olivier • Steve Scherger • Drew Topps • Terry Webber • Sheila Weidman

#### 2024 COMPANY PAC CONTRIBUTORS

Graphic Packaging International PAC • International Paper PAC • Domtar PAC • Sylvamo PAC • Smurfit Westrock PAC

#### 2024 COMPANY EMPLOYEE CONTRIBUTORS

Elizabeth Bartheld • Maggie Bidlingmaier • Brian Davison • Ivan Dremov • Cathy Foley • Ricardo De Genova • Regina Gray  
Andy Johnson • Sarah Manchester • Richard McLeod • Vish Narendra • Elizabeth Spence • Lauren Tashma • Matt Van Vleet  
Mike Weinhold • Joe Yost

#### 2024 OTHER AF&PA STAFF CONTRIBUTORS

Neriza Ambat • Christine Amoonarquah • Kory Bockman • Ryan Carroll • Clara Cozort • Lidija Flaska • Stacey Holst • Tim Hunt  
Scott Jean • Jesse Levine • Mark Pitts • Radu Ramniceanu • Jeff Rhodes • David Ross • Laura Seidman • Kathy Smith • Fara Sonderling  
Abigail Szein • Jamie Tiralla • Susan Van Eaton • Katherine Widman • Frazier Willman • Kathy Zelaya

**\$157,000**  
*raised in 2024*

**90%**  
*AF&PA Board  
Participation*

# 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 was 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.

## 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



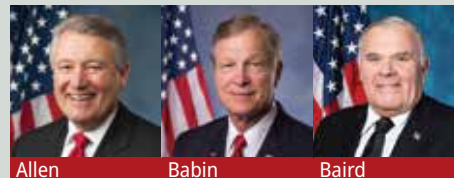
## REPRESENTATIVES

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



\* These Members of Congress retired or resigned



# AF&PA Grows Membership in 2024

## New Company Members:



## New Associate Members:



## Key Statistics:

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

**124** companies and associations represented

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



See all AF&PA members

## AF&PA 2024 Board of Directors

### OFFICERS

#### CHAIR

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

#### FIRST VICE CHAIR

**David Sewell\***, President & CEO, WestRock Company

#### SECOND VICE CHAIR

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

#### IMMEDIATE PAST CHAIR

**Brian McPheely**, Global CEO, Pratt Industries, Inc.

### 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

**Christian Fischer**, President & CEO, Georgia-Pacific LLC

**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

**Charles Hodges**, President & COO, Hood Container Corporation

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

**Arsen Kitch**, President & CEO, Clearwater Paper Corporation

**Daniel Kraft**, President, International, The Kraft Group LLC

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

**Jean-Michel Ribieras**, Chairman & CEO, Sylvamo Corporation

**Ole Rosgaard**, President & CEO, Greif, Inc.

**Laurent Sellier**, CEO, North America, Smurfit Westrock

**Andy Silvernail**, Chairman & CEO, International Paper

Directors served or were elected in 2024

\*Served through June 2024

## Financials

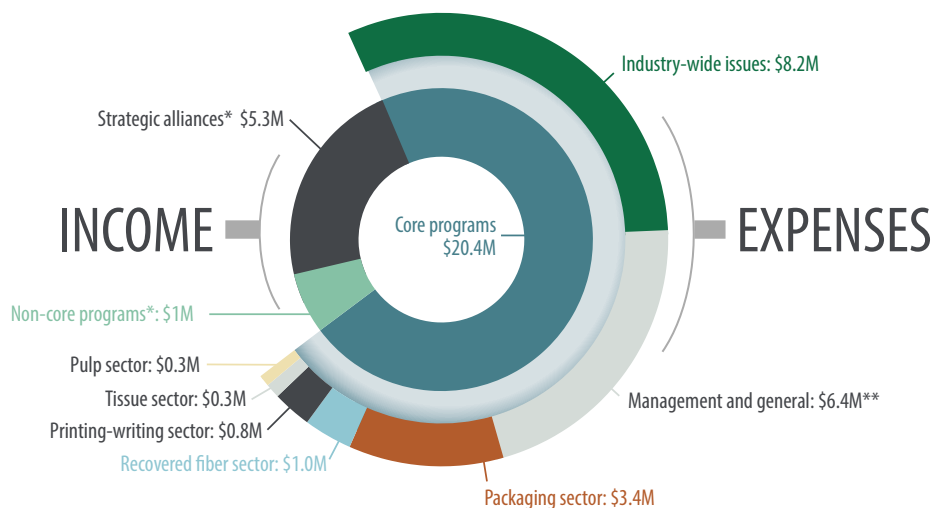
### 2024 BY THE NUMBERS

Provisional financial report

**Overall program spending**  
**\$26.7 Million**

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

\*\*Offset by \$576,510 in association management income





American  
Forest & Paper  
Association

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