



American
Forest & Paper
Association

20
25

AF&PA
YEAR IN REVIEW

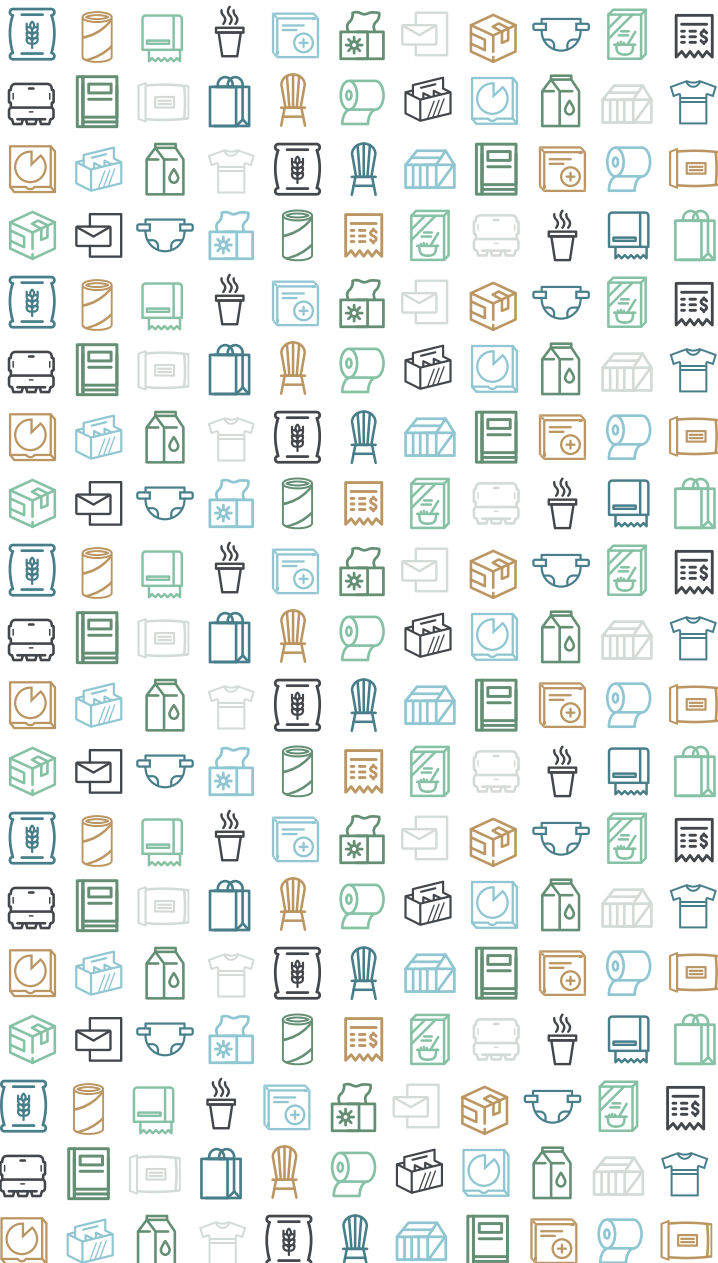


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OUR IMPACT: BY THE NUMBERS

2025 was defined by navigating complex regulatory environments, advancing practical policy outcomes and elevating the industry's profile across the U.S. and globally. Amid **hundreds of executive orders, AF&PA engaged on 35** affecting trade, regulatory policy and energy—**strengthening industry standing and positioning for what comes next.**

12

FEDERAL AGENCIES
ENGAGED

75+

STATE TESTIMONY &
COALITION LETTERS

87

FEDERAL & STATE
COMMENTS FILED

150+

CONGRESSIONAL &
AGENCY MEETINGS

10

COMMUNICATION
& ADVOCACY
AWARDS

2,667

KEYWORDS RANKED
IN THE TOP 10
SEARCH RESULTS

The U.S. forest products industry is one of the largest manufacturing industries in America. Mills are located in many rural communities across the country and are often an important source of family-wage jobs.

The U.S. forest products industry:

925,000+

PEOPLE EMPLOYED

\$435 BILLION+

IN PRODUCTS MANUFACTURED
ANNUALLY

TOP 10

MANUFACTURING SECTOR
EMPLOYER IN 44 STATES

An Industry Joined in Our Mission

In 2025, the American Forest & Paper Association stood strong as the trusted voice for U.S. pulp, paper, packaging and tissue manufacturing. This was a year of meaningful progress. We advanced our strategic priorities. And we kept our industry competitive in a fast-changing policy landscape.

Our achievements across trade, sustainable regulation, recycling policy, biomass energy and chemicals show the impact of proactive advocacy and clear thoughtful strategy. They reflect your leadership and the strength that comes from a consistent and credible voice representing the industry.

As we look ahead, AF&PA will continue to lead with purpose. Together with our members, we will champion policies that strengthen U.S. pulp and paper manufacturing.

Thank you for your partnership,



Heidi Brock

Heidi Brock
AF&PA President and CEO



Mark Kowlzan

Mark Kowlzan
Chairman and CEO, PCA



ENGAGE. INFORM. ADVOCATE.

Together, we're committed to advancing 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.

2025 was marked by a dynamic policy environment. AF&PA members and staff connected with a new administration, members of Congress, and policy influencers in Washington D.C. and states across the U.S. AF&PA staff participated in **12 member company facility visits** and **spoke at 21 industry events**. These opportunities allow us to strengthen connections to our people, products and communities.

Advancing Biomass Energy Policy

In 2025, AF&PA's strategic advocacy elevated biomass as a renewable energy solution in federal and state advocacy, reinforcing its role in powering U.S. pulp and paper mills and reducing emissions.

DIVE DEEPER: Biomass isn't just good policy—it's **smart business**. Using residuals that would otherwise go to waste lowers energy costs, strengthens supply chains and positions our industry as a leader in sustainable manufacturing.

Advancing Bioenergy Recognition

QUICK TAKE: AF&PA secured legislative direction for the U.S. Department of the Treasury to consider existing lifecycle studies and is pressing for recognition in the next Annual Table.

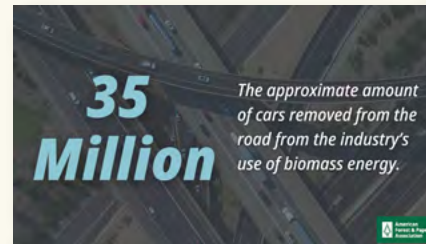
WHY IT MATTERS: This keeps mills positioned for future recognition, and once qualified, continues access to clean energy credits, and supports long-term investment and operational stability.



Defending Fiber Supply in EPA's Biomass Definition

QUICK TAKE: AF&PA submitted technical comments to the U.S. Environmental Protection Agency (EPA) on renewable biomass definitions to protect an affordable and reliable fiber supply.

WHY IT MATTERS: AF&PA's efforts help safeguard operational flexibility and advance our competitiveness.



Supporting High-Performing Paper Recycling

AF&PA is advancing policies that support America's most successful recycling system—paper—while pushing back on approaches that distort markets and raise costs. We lead with facts: **paper recycling works**, and our voluntary goals deliver measurable progress **without mandates**.

DIVE DEEPER: Extended Producer Responsibility (EPR) and advanced recycling proposals threaten to shift costs to mills and redefine recycling to include fuel production. AF&PA advocates for fair, practical solutions that **protect jobs and preserve competitiveness**.

Stopping Costly EPR Overreach in Key States

QUICK TAKE: AF&PA implemented a coordinated, multi-pronged advocacy approach to address **burdensome EPR state legislation** that would impose disproportionate costs on paper producers.

WHY IT MATTERS: AF&PA's advocacy in 2025 went beyond stopping bills—it shaped the conversation. By defeating EPR proposals in 11 states, we **prevented costly mandates** that would have disrupted efficient recycling systems. In Hawaii, Rhode Island and Massachusetts, we **successfully limited legislative action** to authorizing needs assessments instead of sweeping legislation, ensuring decisions are based on data, not politics. And in Maine, Maryland and Washington, we **achieved legislative and regulatory amendments** that protect high-performing paper products and preserve flexibility for recyclability labeling.

“Bad for recycling, bad for Md.”

- *The Daily Record (Maryland) Op-Ed*
by Heidi Brock



Acknowledging Success of Paper Recycling

QUICK TAKE: Federal momentum grew in 2025 as lawmakers advanced resolutions and legislation **recognizing the value of recycling to U.S. manufacturing** and the circular economy. Key actions included Rep. Lou Correa's (D-CA-46) Design for Recycling Resolution, Senate passage of the bipartisan STEWARD Act and Rep. Haley Stevens' (D-MI-11) resolution honoring America Recycles Day. AF&PA engaged throughout to ensure paper's strong recycling performance and industry leadership were reflected in federal discussions.

WHY IT MATTERS: These initiatives **elevate recycling as a national priority**, reinforce the economic importance of recovered materials and support policies that improve data, access and infrastructure. AF&PA's engagement ensures federal actions complement, rather than complicate, high performing paper recycling systems and advance practical, scalable solutions that strengthen circularity and support American manufacturing.

“Here's Exactly How You Should Recycle Your Pizza Boxes (Even The Greasy Ones)”

- *Chowhound*



Defeating Bills That Threaten Recycling Integrity

QUICK TAKE: AF&PA played a critical role in defeating bills that sought to classify fuel production as “recycling,” **protecting the integrity of recycling standards**.

WHY IT MATTERS: Our advocacy advances policies that treat paper fairly and equitably, recognize decades of industry investment and ensure recycling standards do not distort competition among materials.

Leading on Practical, Science-Based Policy

AF&PA is advancing practical, science-based regulations that protect health while enabling investment and growth. From air standards to permitting and workplace safety, we collaborate with policymakers to deliver solutions that keep mills competitive and jobs secure.

DIVE DEEPER: Recent proposals and legacy rules – especially in air – risk stalling modernization and inflating compliance costs. AF&PA brings legal, technical and coalition expertise to secure balanced outcomes and to modernize permitting so capital projects can move forward predictably.



Collaboration for Safer Workplaces

QUICK TAKE: AF&PA engaged with the U.S. Department of Labor Occupational Safety and Health Administration (OSHA) through testimony and written comments during the agency's informal public hearing on the proposed Heat Injury and Illness Prevention rule. Drawing on member experience, AF&PA shared input on approaches that protect workers while allowing effective industry safety programs to continue and evolve.

WHY IT MATTERS: Our engagement highlighted the value of a **science-based, performance-oriented approach** that accounts for geographic and workplace differences, avoids prescriptive mandates that add cost without improving outcomes, and supports the use of emerging technologies to manage heat risk effectively.



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

QUICK TAKE: In 2025, **34 AF&PA members signed on to the voluntary SIF prevention program**. Throughout the course of the year, the workplace safety work group met virtually and in New Orleans and Washington D.C. to collaborate with government officials, representatives from the United Steelworkers, and outside experts to advance safety in our industry.

WHY IT MATTERS: As workplace safety technology, artificial intelligence, and safety culture advance, the SIF prevention program fosters innovation and collaboration among member safety experts on emerging and critical topics. Among the workgroup priorities for 2025 were machine guarding, mobile equipment safety, new to job training and technology.

Keeping U.S. Mills Competitive Worldwide

AF&PA is advancing fair and reciprocal U.S. trade policy, reducing non-tariff trade barriers and ensuring essential inputs and equipment remain accessible. Our approach protects cross-border supply chains and positions members to invest and grow in the United States.

DIVE DEEPER: We engaged U.S. decision-makers to keep United States-Mexico-Canada Agreement (USMCA) compliant flows duty-free, address the EU deforestation regulation (EUDR) as a non-tariff trade barrier and **prevent tariffs on critical pulp inputs and machinery** not available in the United States. Predictable trade policy equals investment certainty and global competitiveness.

EUDR Recognition & Delay: Creating Breathing Room for Fixes

QUICK TAKE: The U.S.–EU joint statement **recognized the U.S. as “negligible risk”** and elevated EUDR on the transatlantic agenda while the European Parliament voted to delay and simplify the regulation. AF&PA’s sustained outreach kept industry concerns central to the conversation.

WHY IT MATTERS: AF&PA’s advocacy helped secure the negligible-risk recognition, which supports a more **proportionate and workable** approach to due-diligence requirements. Parliament’s move to delay and streamline EUDR creates space to address the regulation’s most unworkable elements before implementation. This reduces near-term compliance risk for member companies and strengthens the case for an EUDR framework that reflects the U.S. low-risk profile and **avoids unnecessary trade disruptions**.

“EU deforestation delay blamed on IT, but critics see Washington’s work”

- Euroactiv



Thank you President Trump and USTR for recognizing EUDR as a non-tariff barrier to trade for the U.S. forest products industry



“ Tariffs could disrupt paper industry’s complex supply chains ”

- Pulp Paper News

Preserving Critical Inputs in the Section 232 Process

QUICK TAKE: In the lumber/timber 232 outcome, wood pulp and converted paper products were **not included in remedial tariffs**, reflecting AF&PA comments and engagement.

WHY IT MATTERS: Section 232 actions allow the administration to impose tariffs on imports deemed a national security risk. By excluding wood pulp and converted paper products, the final outcome helped **preserve access** to essential inputs.

Supporting Predictable U.S. Trade

QUICK TAKE: AF&PA underscored the complexity of North American supply chains to the administration and Congress, supporting continued **duty-free entry for USMCA-compliant products** and appropriate priorities in the USMCA review.

WHY IT MATTERS: This work helps ensure uninterrupted movement of fiber and finished products across North American borders. **Predictable, tariff-free trade** preserves supply-chain efficiency, supports mill competitiveness and protects customer reliability.



Creativity alert! The PPA 2025 Student Design Challenge finalists were just revealed! Congratulations to the teams from @CalPoly and @RITtigers. Their creativity and innovation are helping shape the future of packaging design. bit.ly/4mWiSxX

@paperboardpkg



Student Design Challenge Winners Find Sustainable Alternatives for Pet Care Packaging

QUICK TAKE: This year, student design teams from across North America competed to create sustainable, recyclable packaging for a line of pet care products, PPA Pets. Student design projects from the following schools were named as winners:

- 1st Place: Rochester Institute of Technology: Protection Prevention & Awareness for Pets
- 2nd Place: California Polytechnic State University: PAWSH
- 3rd Place: California Polytechnic State University: Teef Story

DIVE DEEPER: The Student Design Challenge is an annual competition where university students in leading sustainable packaging or graphic design programs create innovative, recyclable paper-based packaging solutions that meet real-world customer needs. The Paperboard Packaging Alliance is a joint initiative of the American Forest & Paper Association and the Paperboard Packaging Council. See all of the student designs at paperboardpackaging.org.

Driving Influence Through Award-Winning Work



PLATINUM AWARD (SEO CAMPAIGN)

Redefining the Digital Forest: Elevating Sustainability Advocacy without Ad Spend

GOLD AWARD (BLOG POST)

Raising Awareness, Sparking Action: Explaining the Impact of EUDR to Key Stakeholders



HONORABLE MENTION (LANDING PAGE)

Crafting Content that Connects: Explaining How Paper Recycling Works



DIGITAL PUBLICATION

Elevating AF&PA's Voice Authority Through a Search-First Content Strategy



HONORABLE MENTION

CEO Update and Association TRENDS Association Executive of the Year



AF&PA 2025 Board of Directors

Officers:

Chair

Mark Kowlzan

Chairman and CEO, Packaging Corporation of America

First Vice Chair

Mike Doss*

President and CEO, Graphic Packaging International, LLC

Second Vice Chair

Jean-Michel Ribieras*

Chairman and CEO, Sylvamo Corporation

Immediate Past Chair

Howard Coker

President and CEO, Sonoco Products Company

AF&PA Welcomed 2 Members in 2025



SEE OUR FULL MEMBER LIST & 2026 BOARD OF DIRECTORS AT AFANDPA.ORG

Directors:

Craig Anneberg, CEO, North Pacific Paper Company, LLC

Patrick Boushka, Executive Vice President, Packaging & Cellulose, Georgia-Pacific LLC

Dick Carmical, CEO, The Price Companies Inc.

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

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

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

Michael Haws, President and CEO, Sappi North America

Kevin Hayward, CEO, Ox Industries

Steve Henry, President, Paper & Packaging, Domtar

Arsen Kitch, President and CEO, Clearwater Paper Corporation

Daniel Kraft, President, International, The Kraft Group LLC

Brian McPheely, Global CEO, Pratt Industries

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

Ole Rosgaard, President and CEO, Greif, Inc.

Laurent Sellier, President and CEO North America, Smurfit Westrock

Andy Silvernail, Chairman and CEO, International Paper Company

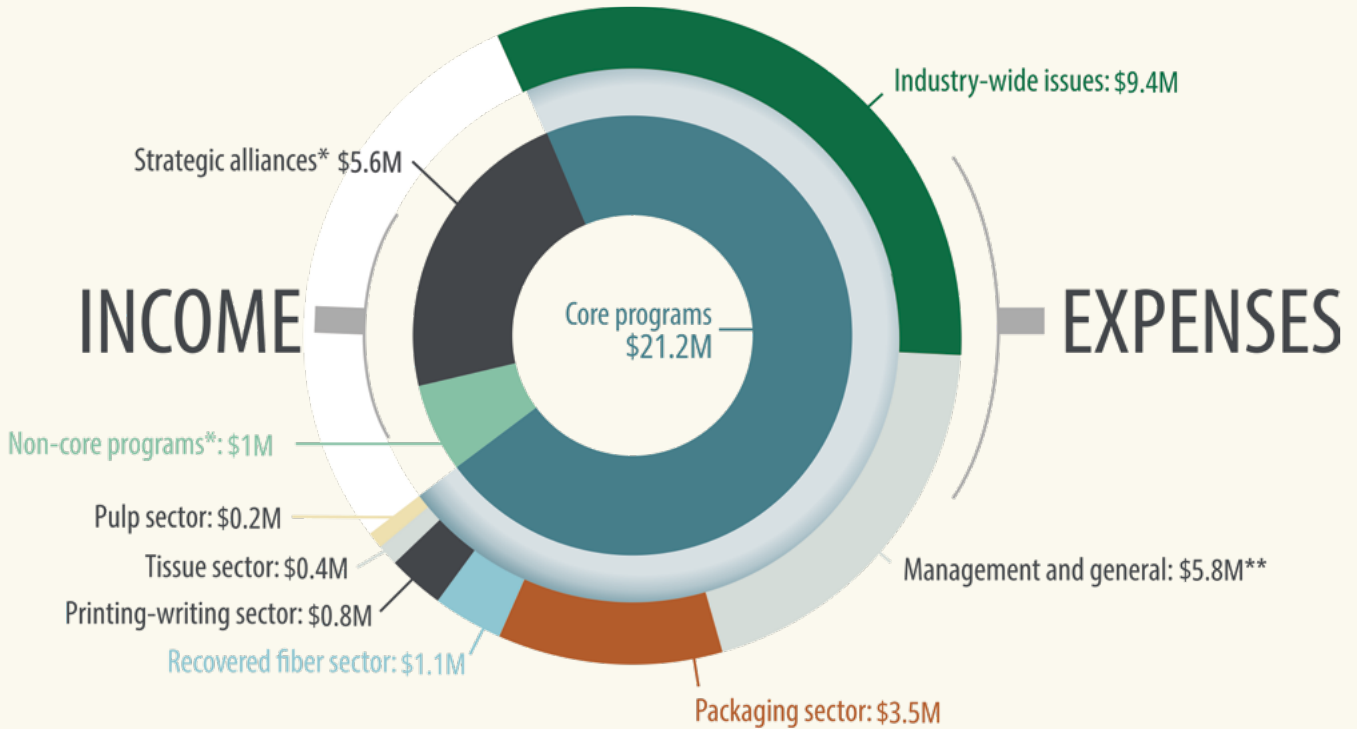
John Sims, CEO, Sylvamo Corporation

* Retired or left the board in 2025

2025 BY THE NUMBERS

Preliminary Financial Report

Overall program spending: **\$27.8 million**



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

**Offset by \$532,694 in association management income

AF&PA Political Action Committee

The AF&PA Political Action Committee (PAC) raised \$173,600 in 2025 with participation from 94% of eligible board members. AF&PA staff participation also increased by 22% in 2025. This year, AF&PA's government affairs staff attended 55 PAC events, with the PAC contributing \$186,500 to candidates since January 2025. Staff attended almost all events in coordination with one or more member companies.

Thank you to our 2025 PAC Contributors

Platinum Club (\$10,000)

Howard and Rhonda Coker
Mark and Sue Kowlzan

Gold Club (\$5,000)

Craig Anneberg
Heidi Brock*
Dick Carmical
Mike Doss
Christian Fischer
Mike Haws
Arsen Kitch
Dan Kraft
Jonathan Kraft
Robert Kraft
Will Kress
Brian McPheely
Colin Moseley
Jean-Michel Ribiéras
Laurent Sellier
Andy Silvernail
Alexander Toeldt
Ken Wallach
Ken Winterhalter

Silver Club (\$2,500+)

Julie Landry*
Darla Olivier
Elizabeth VanDersarl*

Contributors (\$1,000+)

Dana Cook
Michael Farrell
Lidija Flaska*
Nathan Jeppson
Rob Kreizenbeck
Lindsay Murphy*
Paul Noe*
Steve Scherger
Drew Topps*
Terry Webber*
Sheila Weidman

**AF&PA Staff Contributors*

Company PAC Contributors

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

Company Employee Contributors

Cafer Arac
Virginia Aulin
Elizabeth Bartheld
Heidi Blair
Brian Davison
Cathy Foley
Clive Gillanders
Regina Gray
Andy Johnson
Dave Kluesner
Seth Kursman
Sarah Manchester
James McDonald
Vish Narendra
Douglas Schwartz
Elizabeth Spence
Lauren Tashma
Jason Varney

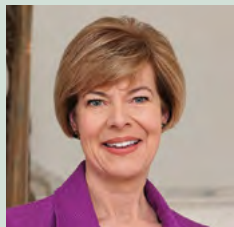
Other AF&PA Staff Contributors

Neriza Ambat
Gabriell Barr
Lauren Clark
Kory Bockman
Ryan Carroll
Clara Cozort
Stacey Holst
Tim Hunt
Susan Gardinier Kimball
Jesse Levine
Shoshana Micon
Liz Olds
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

Paper & Packaging Caucus

AF&PA supports the Paper and Packaging Caucus's purpose 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. Originating in the House in 2013 with 50 members, the caucus expanded membership to include the Senate in 2015. Members host educational events throughout each year and promote the forest products industry during **National Forest Products Week**—recognized during the 3rd week of October.

Senate Caucus Co-Chairs:



Sen. Tammy Baldwin
(D-Wisconsin)



Sen. John Boozman
(R-Arkansas)

House Caucus Co-Chairs:



Rep. Lou Correa
(D-California-46)



Rep. Dan Newhouse
(R-Washington-4)

Senate Members:

Marsha Blackburn (R-TN)

Angus King (I-ME)

Shelley Moore Capito (R-WV)

Amy Klobuchar (D-MN)

Susan Collins (R-ME)

James Risch (R-ID)

Tom Cotton (R-AR)

Tina Smith (D-MN)

Cindy Hyde-Smith (R-MS)

Roger Wicker (R-MS)

House Members:

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

Chuck Fleischmann, R-TN-3

Adam Gray, D-CA-13

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

Bob Latta, R-OH-5

Mariannette Miller-Meeeks,
MD, R-IA-1

Daniel Meuser, R-PA-9

Greg Murphy, R-NC-03

Richard Neal, D-MA-1

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

Haley Stevens, D-MI-11

Glenn Thompson, R-PA-5

Mike Turner, R-OH-10

Bruce Westerman, R-AR-4

Rob Wittman, R-VA-1



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