

American Forest & Paper Association

AF&PA Platform for Paper

A framework for strengthening the U.S. paper industry

POLICY PRIORITIES FOR U.S. PULP AND PAPER MILLS

AF&PA represents U.S. manufacturers of pulp, paper, packaging and tissue products. Safety is a core value of our industry – one built on the strength of American manufacturing and rural communities.

THE U.S. FOREST PRODUCTS INDUSTRY REPRESENTS

925,000 U.S. Jobs	**$435 Billion** In Products Annually	**Top 10** Employer in 44 States	**75%+** Rural Facilities

GLOBAL COMPETITIVENESS

Ensuring U.S. pulp, paper, packaging and tissue manufacturers compete in a market that is not only free, but fair. AF&PA supports policies that drive innovation, expand market access, strengthen North American trade relationships and hold non-market economies accountable, so U.S. manufacturers compete on a level playing field around the world.

U.S. MILL COMPETITIVENESS

Supporting a policy environment that enables mills to invest, innovate and build on U.S. manufacturing strength. America's pulp and paper mills depend on affordable energy, reliable fiber supplies and a regulatory framework that supports long-term investment. AF&PA advocates for practical, science-based policies that recognize the benefits of biomass energy, promote efficient permitting and remove unnecessary regulatory barriers to U.S. manufacturing strength.

U.S. MARKET COMPETITIVENESS

Advancing policies that ensure fair treatment of paper products in strong domestic markets. AF&PA supports practical approaches that preserve effective recycling systems and strengthen sustainability, while avoiding mandates that increase costs for manufacturers and consumers without improving outcomes.

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GLOBAL COMPETITIVENESS

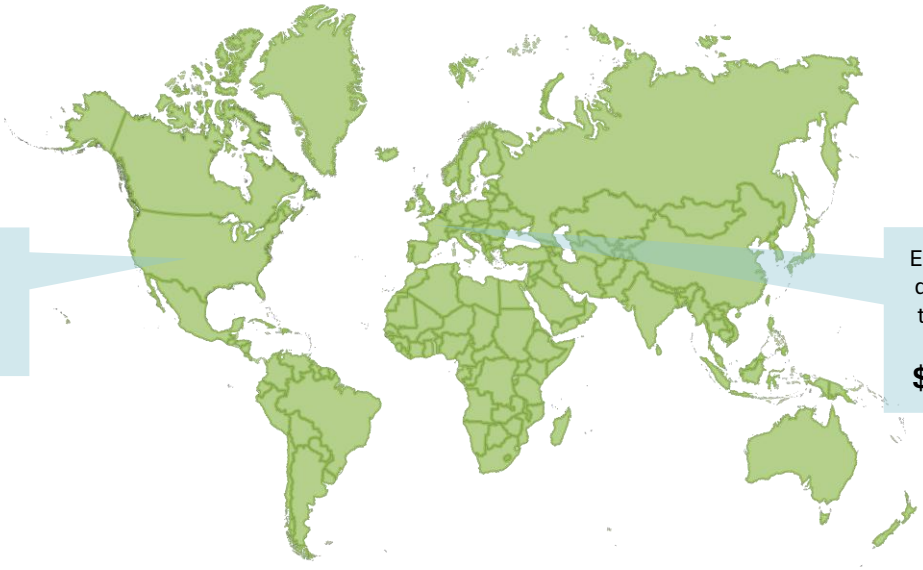
OUR ASK: Advance trade policies that keep the market free and fair — expanding market access, strengthening North American trade relationships and countering non-market economies and barriers that disadvantage U.S. manufacturers.

Why It Matters

- Global markets support American manufacturing jobs, manufacturing strength and rural communities.
- In 2025, the U.S. exported **more than $22 billion** in pulp, paper and packaging products.
- Tariffs and non-tariff trade barriers increase costs, reduce competitiveness and create uncertainty for manufacturers.
- The EU Deforestation-Free Regulation (EUDR) threatens **more than $3.5 billion** in U.S. exports and could disrupt established supply chains.
- North American markets remain critical to the industry's success. In 2025, the U.S. conducted **more than $21 billion** in combined pulp and paper trade with Canada and Mexico.

AF&PA Supports

- Open and fair access to international markets including renewal of the USMCA
- Opposition to tariffs on equipment that cannot be made in the U.S
- U.S. engagement with the EU to prevent trade disruption



$21 BILLION
U.S.-Canada-Mexico Trade (2025)

EUDR threatens to disrupt trade with the EU, valued at more than **$3.5 BILLION**

$22 BILLION +

U.S. PULP, PAPER & PACKAGING EXPORTS

American Forest & Paper Association

U.S. MILL COMPETITIVENESS

OUR ASK: Advance policies that build U.S. manufacturing strength through investment, promoting regulatory certainty, science-based decision making and recognition of biomass energy's role in mill operations.

Why It Matters

- Pulp and paper mills are **long-term manufacturing assets** that require a stable investment environment.
- Regulatory complexity and permitting delays can slow modernization projects and deployment of reliable, more efficient technologies.
- **More than 2/3** of a mill's energy needs are met with renewable biomass energy, making energy policy an important competitiveness issue.
- Inconsistent biomass and chemical policies create uncertainty that can discourage investment and increase operating costs.
- Competitive mills are the strength of American manufacturing, supporting rural communities and a sustainable economy.

AF&PA Supports

- Efficient air and water permitting and reduced regulatory gridlock.
- Regulations and chemical policies grounded in sound science, law and cost-benefit analysis.
- Federal recognition of industry biomass energy as carbon neutral and policies that preserve access to affordable pulpwood.

SCIENCE-BASED POLICY
Chemical Regs • Cost-Benefit Analysis

REGULATORY CERTAINTY
Permitting • Predictability



AFFORDABLE PULPWOOD
Reliable Access • Supply

BIOMASS ENERGY
Carbon-Neutrality

U.S. MILL INVESTMENT MODERNIZATION • STRENGTH • RURAL JOBS

U.S. MARKET COMPETITIVENESS

OUR ASK: Support policies that preserve consumer choice, protect successful recycling systems and ensure fair treatment of paper products in the marketplace.

Why It Matters

- Paper is one of the most widely and highly recycled materials in the U.S.
- Recycling rates continue to improve:
  - Paper: **65–69%**
  - Cardboard: **71–76%**
- Paper recycling helps drive American manufacturing. Every day, **125,000 tons** of recycled paper is turned into new products.
- Paper recycling is driven by market demand, especially from U.S. paper mills—**80%** of which use recycled paper to make essential products.
- Including paper in government mandates like Extended Producer Responsibility (EPR) will not improve recycling outcomes—but it is adding unnecessary costs to **a system that already works**:
  - California restarted its rulemaking process after facing unexpectedly high EPR implementation costs
  - Oregon's EPR law encountered a legal challenge
- Energy recovery should not be conflated with recycling. Industries that burn materials for fuel could claim higher recycling rates than those that reuse materials – like paper.
- Consumers and businesses rely on paper packaging, mail, receipts, financial documents and other essential paper-based communications.
- Policies that restrict paper options or favor specific materials or communication channels limit consumer choice and deny paper fair treatment in the marketplace.

AF&PA Supports

- Free-market, voluntary recycling systems and opposition to costly EPR mandates that do not improve recycling outcomes.
- Clear, consistent, and fair treatment of recycling and environmental product claims that protect consumers, upholds the recycling system, and encourages circular economy innovations.
- Consumer access to paper statements, notices, receipts, mail and other paper-based communications.
- Accurate recycling definitions that distinguish recycling from energy recovery.