

MAKE THAT RECYCLED:
A Buyer's Guide to Recycled Coated Freesheet Paper
By the Alliance for Environmental Innovation, with Business for Social Responsibility

Using recycled paper brings many environmental benefits. Compared to virgin paper, producing recycled paper consumes less energy and natural resources, generates less air and water pollution, and cuts the amount of trash sent to incinerators and landfills – thus reducing solid waste and greenhouse gas emissions. By buying recycled paper, companies can take a significant step toward reducing their overall environmental impacts.

Despite these clear benefits, many businesses have still not embraced the use of recycled paper – mostly for reasons that no longer exist. In the past, higher prices for recycled printing and writing grades kept such paper out of the reach of many purchasers. It is also true that the quality of some early recycled papers was inferior to virgin. In recent years, however, technological advances in papermaking have vastly improved the quality of recycled paper. At the same time, price premiums for many recycled grades have decreased or disappeared. With these barriers eliminated on the supply side, it is now time for paper buyers to close the gap in demand.

The Alliance for Environmental Innovation (the Alliance) is a project of Environmental Defense and The Pew Charitable Trusts. The Alliance works with companies to improve their environmental performance while continuing to meet business needs. To learn more, call 617-723-2996 or visit www.environmentaldefense.org/alliance.

Business for Social Responsibility (BSR) is a membership organization for companies of all sizes and sectors. BSR provides its members with innovative products and services that help them be commercially successful in ways that demonstrate respect for ethical values, people, communities, and the environment. Contact us at (415) 537-0888 or visit www.bsr.org.

This report makes the case for specifying recycled content in **coated freesheet** paper – the type used in many catalogs, magazines, books, annual reports, and marketing materials.

The Alliance's research for this report confirmed the following:

- ❑ **FACT:** Major suppliers of coated freesheet grades offer recycled paper at **the same price** as virgin paper.
- ❑ **FACT:** Leading users and printers confirm there is **no difference in appearance, strength, or runnability** between recycled and virgin paper.
- ❑ **FACT:** Switching to recycled paper **benefits the environment**.
- ❑ **FACT:** Buying recycled **demonstrates your environmental responsibility**.

The bottom line: buying recycled paper makes environmental and business sense.

FACT: Recycled coated freesheet paper is widely available at the same price as virgin paper.

Coated freesheet paper with 10% postconsumer fiber is widely available and affordable in today's marketplace. In the spring of 2000, the Alliance interviewed senior marketing executives from the top ten North American coated freesheet producers, representing close to 100% of the North American capacity for this grade. All ten offer coated freesheet paper with at least 10% postconsumer fiber. Five of the ten mills, representing approximately 40% of total capacity, told the Alliance they offer recycled coated freesheet grades **at the same price** as virgin paper. The remainder reported charging premiums ranging from \$1-3 per hundredweight. Some told us they waive the premium at times, depending on the customer, the type of paper, or the size of the order.

The table below shows the availability and relative pricing of recycled coated freesheet paper from major North American suppliers.

Table 1: North American suppliers offering recycled coated freesheet paper

Paper Grade	Suppliers Currently Offering at Same Price as Virgin Paper	Suppliers Currently Offering at a Premium (subject to negotiation)
No. 1 coated	Appleton, Potlatch, S.D. Warren	Champion, Mead
No. 2 coated	Appleton, Consolidated, Potlatch, S.D. Warren*	Champion, Mead, Westvaco, West Linn, S. D. Warren*
No. 3 coated	Appleton, Consolidated, Domtar, International Paper, S.D. Warren*	Champion, Mead, Westvaco, West Linn, S. D. Warren*

Source: Alliance conversations with top ten North American producers, as ranked by 2000 Pulp & Paper North American Factbook. Information supplied is for 10% postconsumer recycled content.
 * S.D. Warren: no premium on sheet-fed paper, premium on web paper. (Sheet-fed presses print single sheets of paper; web presses print a continuous roll of paper at high speed.)

You don't need to purchase paper directly from the mill to buy recycled. If your printer, design house, or ad agency is sourcing paper for you, make sure they include at least 10% postconsumer recycled content in their paper specifications.

"In looking to expand the use of recycled paper in our catalog titles, I've been pleasantly surprised by how many of my suppliers are willing and able to furnish at least a 10% postconsumer recycled sheet at no premium, simply by my asking for it."
 -- John Snyder, Manager, Print and Production, Norm Thompson Outfitters

FACT: Recycled coated freesheet paper performs as well as virgin paper.

The quality of recycled printing and writing papers has greatly improved in the last five years. While some early recycled papers appeared grainy, dull, or discolored, current grades are largely indistinguishable from their virgin counterparts – unless the manufacturer deliberately adds flecks of color to create a “natural” look.

At the currently available levels of postconsumer fiber (10 - 50% for coated papers) there is no decline in appearance (print surface, gloss, color reproduction, opacity, brightness) or performance (vulnerability to web breaks and “picking on press”) compared to virgin paper. The following testimonials from end-users and printers confirm this point.

Printers concur:

"We have printed catalogs for several years on recycled content paper from several of the leading mills. In our experience, there is little if any difference between printing on paper with various levels of postconsumer recycled content and 100% virgin fiber paper. Our customers have been very satisfied with the results."

-- George Marsh, Purchasing Manager, Danner Press

"We have experienced no performance differences between recycled and virgin sheets, and will gladly print on recycled paper for any customer who requests it."

-- Mike McConnell, Vice President, Special Projects, Press of Ohio

"Recycled coated freesheet paper definitely gets my stamp of approval. It has never caused us any problems with runnability, and its printability is just like that of virgin paper."

-- Ryan Vergiels, Paper Purchasing Manager, Quad Graphics

Norm Thompson Outfitters, a catalog retailer based in Hillsboro, Oregon, prints the body of its Early Winters catalog on a #4 coated groundwood sheet with 10% postconsumer fiber, while its film-coated freesheet cover contains a generous 50% postconsumer fiber. According to John Snyder, Norm Thompson's print and production manager, the company has experienced “no compromise in print quality or runnability issues on press.”

Bank of America Corporation, based in Charlotte, NC, prints its three annual reports on recycled paper. The financial and foundation reports are printed on coated paper with 10% postconsumer recycled content, and the environmental report is printed on uncoated paper with 30% postconsumer recycled content. “We have had no issues with appearance, print quality, or adverse costs by using recycled paper,” reports Merry Lindsay, assistant vice president and environmental initiatives program manager at Bank of America.

Gap Inc. asks employees to purchase paper with a minimum of 20% postconsumer recycled content for bond, copy, printing and writing papers, and promotional and informational materials.

FACT: Switching to recycled paper yields meaningful environmental benefits.

Manufacturing and disposing of paper places a substantial burden on the environment. Paper production is the fourth most energy-intensive of all manufacturing industries, and one of the most polluting – generating large amounts of air and water pollution, and solid waste. Paper also comprises a third of the waste sent to municipal landfills, where along with other impacts, it breaks down and produces methane, a greenhouse gas with 21 times the heat-trapping power of carbon dioxide.

Using recycled paper significantly reduces the environmental impacts of paper production and disposal. From the paper purchaser’s perspective, each ton of recycled fiber that displaces a ton of virgin fiber used in coated freesheet paper reduces total energy consumption by 38%,¹ net greenhouse gas emissions by 40%, particulate emissions by 36%, wastewater by 32%, and solid waste by 46%.

A company that purchases 10,000 tons of coated freesheet paper can realize the following environmental gains from switching to paper with 10% postconsumer recycled content:

Table 2: Benefits of adding 10% postconsumer fiber to 10,000 tons of coated freesheet

Environmental Impact	Reduction [Increase]	Equivalent to:
Wood use	2,850 tons of trees	Not applicable
Total energy use	13.8 billion BTUs	133 households’ annual residential energy use
Net greenhouse gas emissions (CO2 equivalents)	2.2 million pounds	189 cars driven an average of 200 miles per week for a year
Air Emissions	3,800 pounds of nitrogen oxides (NO _x) 560 pounds of sulfur dioxide (SO ₂) 4,100 pounds of particulates 2,900 pounds of volatile organic compounds 1,500 pounds of hazardous air pollutants 280 pounds of sulfur compounds	NO _x : 71 households* SO ₂ : 7 households* Equivalents not available for particulates, volatile organic compounds, hazardous air pollutants, or sulfur compounds
Waterborne Wastes	[1,650 pounds of biochemical oxygen demand] [1,200 pounds of total suspended solids] 74,600 pounds of chemical oxygen demand 1,350 pounds of chlorinated organic compounds	Equivalents not available
Wastewater	5.7 million gallons	Annual wastewater discharge of 58 households
Solid Waste	1,047,210 pounds	Annual trash of 246 households

Source: Paper Task Force, Alliance calculations.²

*Air pollutant equivalents are based on average annual emissions for a \$50/month electricity bill.

Postconsumer vs. Preconsumer

Total recycled content may include pre- and/or postconsumer materials. From an environmental perspective, the percentage of postconsumer recycled content is what matters most.

Postconsumer materials are finished products that have served their useful lives and would otherwise end up in a landfill or incinerator. **Preconsumer** materials include trim and scrap from manufacturing processes (e.g., converting paper rolls into envelopes), most of which has been recycled for decades. Buying paper with postconsumer recycled content rewards paper manufacturers that have made investments to expand the recycling infrastructure (e.g., by building new deinking facilities) and creates an incentive for paper producers to use more paper diverted from disposal.

Obviously, the more recycled fiber you use – whether by increasing the number of applications for which you substitute recycled paper for virgin, or by raising the percentage of postconsumer content in the recycled paper you already buy – the greater the benefits. While this report focuses on 10% postconsumer recycled content paper because of its wide availability and favorable economics, many specialty coated papers are available with up to 50% postconsumer recycled content.

Companies buying coated freesheet paper should consider 10% as a floor, and strive to use the highest level of postconsumer recycled content they can find, consistent with their budget and functional requirements.

FACT: Using recycled paper demonstrates your company's environmental responsibility.

The case for using recycled paper is further strengthened by public concern for the environment. Market research consistently shows that a majority of American consumers consider themselves to be environmentalists, and support companies that do more than just comply with environmental regulations.³ Several recent polls have demonstrated that good environmental performance, as a determining factor in overall company reputation, can positively impact customer retention.⁴

Recycling is an environmental solution that enjoys broad popular support. According to Gallup's Earth Day 2000 poll, 90% of those surveyed regularly and voluntarily recycle newspapers, glass, aluminum, and other items.⁵ Likewise, the benefits of sourcing recycled products make intuitive sense to consumers. By using recycled paper, and noting the postconsumer recycled content on your catalog, report, or brochure, you send a tangible message to your customers, employees, and other stakeholders that you have made an environmentally responsible choice.

FURTHER RESOURCES

A comprehensive resource for paper purchasers wishing to understand and minimize the environmental impacts of their paper use is *Paper Task Force Recommendations for Purchasing and Using Environmentally Preferable Paper*, ©1995 by The Environmental Defense Fund. The main report and a brief project synopsis are available at www.edf.org/pubs/Reports/ptf/Acrobat or by calling (212) 505-2100.

The following organizations share the goals of reducing waste, promoting recycling and helping purchasers source environmentally preferable paper:

- The Alliance for Environmental Innovation (www.environmentaldefense.org/alliance)
- Business for Social Responsibility (www.bsr.org)
- Conservatree (www.conservatree.com)
- Green Seal (www.greenseal.org)
- National Recycling Coalition (www.nrcrecycle.org)
- Northeast Recycling Council (www.nerc.org)
- Recycled Paper Coalition (www.papercoalition.org)
- ReThink Paper (www.rethinkpaper.org)
- U.S. Environmental Protection Agency, WasteWiSe program (www.epa.gov/epaoswer/non-hw/reduce/wstewise/index.htm)

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¹ Virgin pulp mills typically consume both purchased energy (in the form of electricity and fossil fuels) and energy generated by burning wood-derived waste materials produced on-site (e.g., bark, pulping liquors). Because recycled pulp production does not require wood -- and hence doesn't create these wood-derived wastes -- it requires more purchased energy than virgin pulp production (in this case 13% more), but still consumes less total energy (in this case 38% less).

² Analysis is based on data in Paper Task Force report, pp. 108-109, and reflects the following additional assumptions: (a) the environmental impacts of coating materials are not included, and (b) impacts from the papermaking step in the production process are assumed to be the same for virgin and recycled paper.

³ Annual polls by the Gallup Organization, Environmental Research Associates, Roper Starch Worldwide, and Wirthlin Worldwide.

⁴ Per the Millennium Poll, an international survey of 22,000 adults cosponsored by the Prince of Wales Business Leaders Forum (1999), and Environmental Research Associates' 1998 survey of 1,000 adults.

⁵ The Gallup Organization's Earth Day 2000 Survey of 1,004 adults, fielded April 2000.