

Trends, Trade and Tariffs:

Policy Impacts on Tissue

Presented by:

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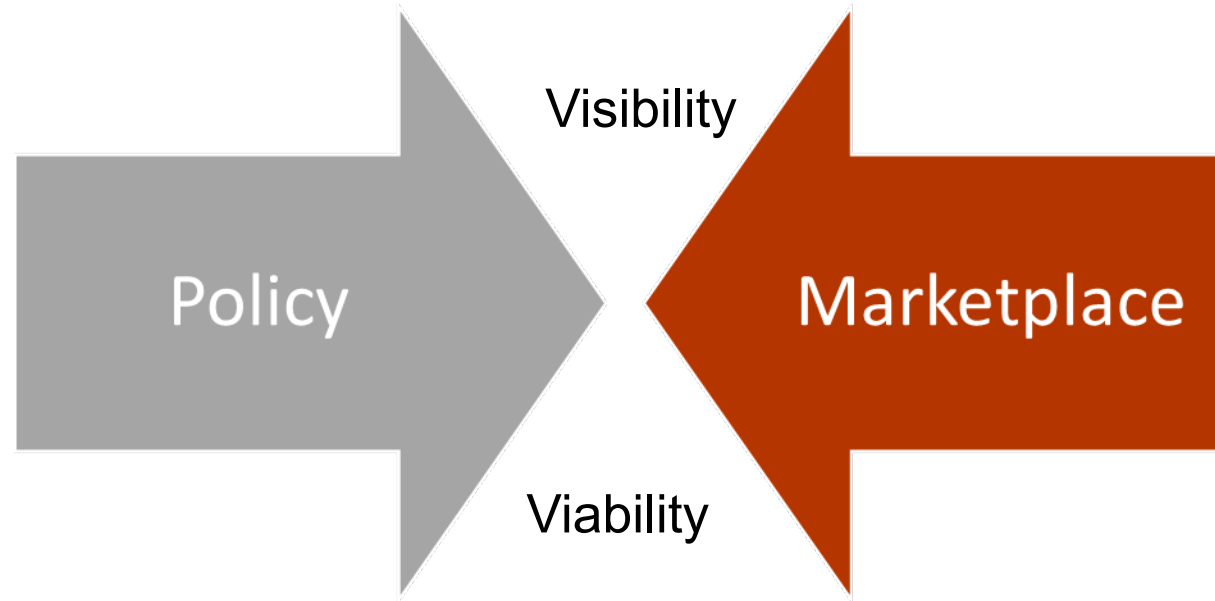
**Executive Director, Printing-Writing, Pulp & Tissue
American Forest & Paper Association**



About AF&PA



Government policy and marketplace policy are converging



Public Policy Backdrop

The National
Agenda of I's



Immigration



Investigations (Impeachment)



Infrastructure



International Trade



AF&PA Industry-wide 2019 Policy Priorities

- Regulatory and Process Reforms
- A more resilient U.S. Paper Recycling System
- Transportation Infrastructure and Efficiency Improvements
- Free and Fair Trade



Regulatory Reform

- Do more good than harm
- Sound Science
- Transparency
- Streamlined process



Regulatory Reform

- Streamlined process



Recycling

- U.S. 2018 recovery rate: 68.1 percent
- China National Sword- Market disruption
- U.S. EPA- “America Recycles Day”
- Market-based advocacy



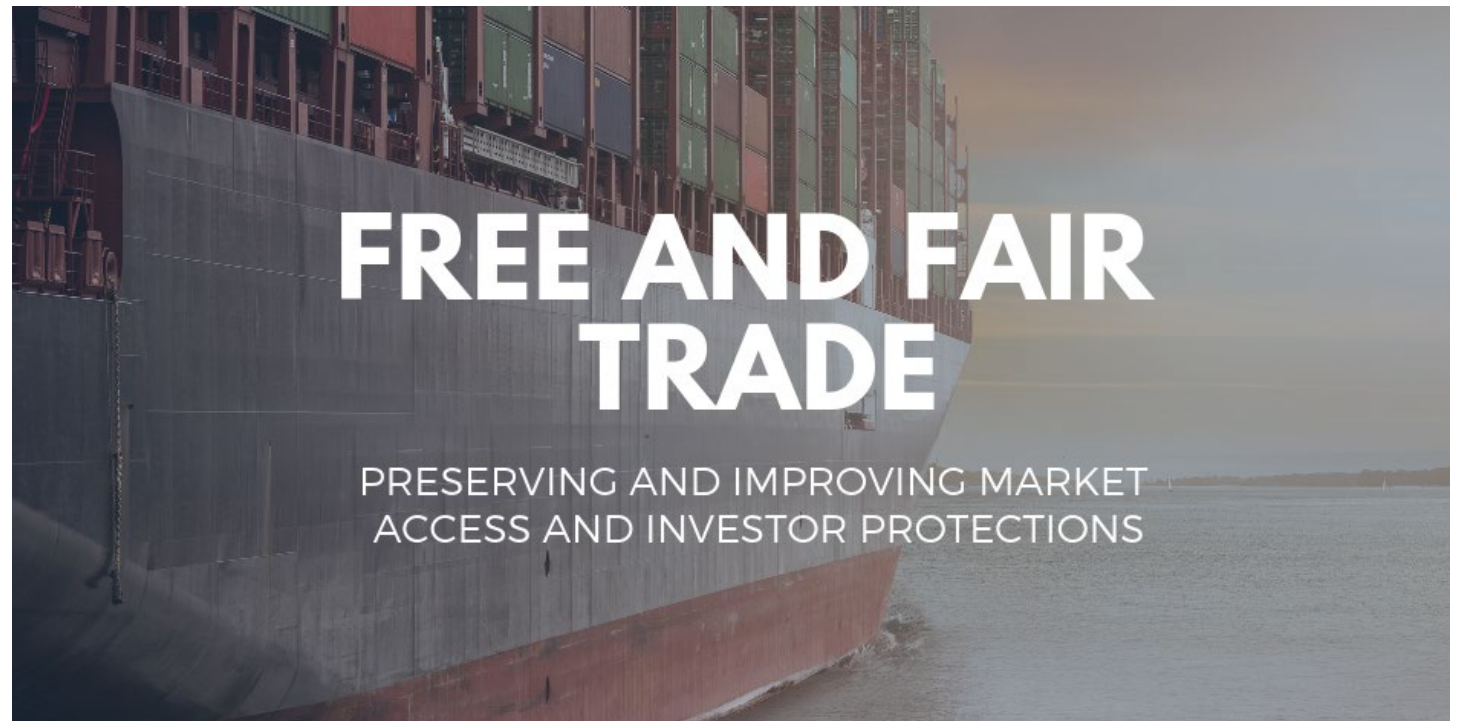
Transportation

- Truck weights
- Rail
 - Reverse Surface Transportation Board forest products exemption



Trade

- Free and Fair Trade
- USMCA
- Tariffs



Trade



Tissue Sector Policy Issues

- Recycled fiber
- Chemical regulation
- Flushability
- False claims
- Sustainability



Recycled Fiber

- Critical input for tissue manufacturers
 - 2018 Tissue sector consumption of recovered paper: 4.4 million tons
- MIT research
 - *Dynamic Fiber Flows Model*



Chemical Regulations

Per- and Polyfluorinated Substances (PFAS)

- Short-Chain PFAS Approved by FDA Provide Important Protective Properties for Food Packaging
- Legislation Must:
 - Distinguish Between Short- and Long-Chain PFAS
 - Exempt FDA-approved PFAS
 - Exempt PFAS Not Intentionally-Added (Recovered Fiber)



Flushability/Compostability

- Product standards
- State/local governments

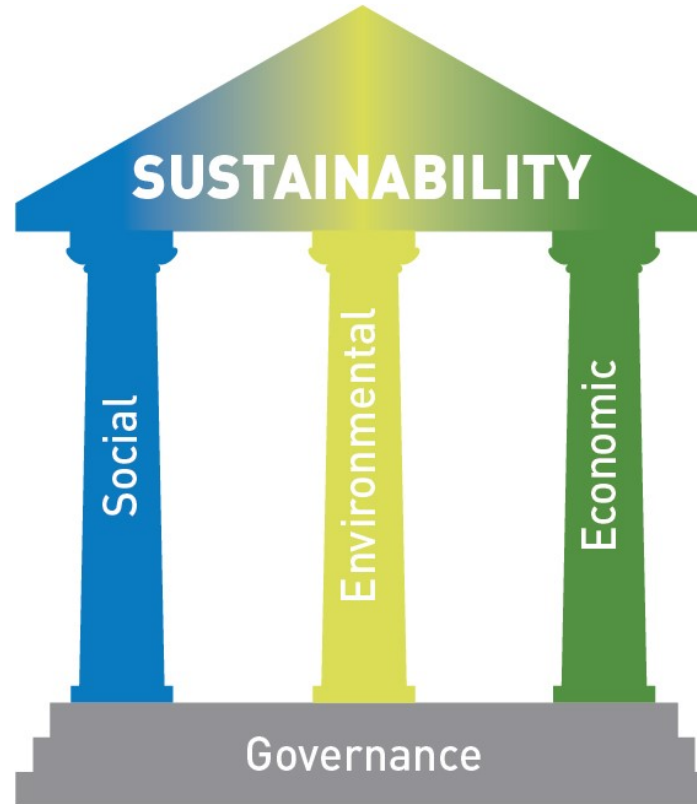


False Claims

- Anti-paper marketing claims by competitors
- ENGO tissue campaign
- Paper Towel promotion program



Sustainability



BETTER PRACTICES
BETTER PLANET 2020
Continuing AF&PA's Commitment to Sustainability



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afandpa.org/sustainability



Sustainability



Thank you

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