

THE BLUELINE REPORT 2015

*North American Printers:
Sustainability, Transparency,
Paper Sourcing & Forest
Conservation*

**A Business
Consumer Guide
& Ranking**



canopy

image: Jin Choi



Hot Off the Press: Printers, Forests and Delivering on Sustainability

**THE BLUELINE REPORT REVEALS THE BEST OF NORTH AMERICA'S
FOREST FRIENDLY PRINTERS.**

We want to make it easy for you to make good choices. This 2015 industry assessment is written specifically for major consumers of printed materials – whether you're a publisher, catalogue manufacturer or company that relies on printed marketing materials as a core part of your distribution strategy. We rank major printers against their competitors on a variety of key sustainability criteria and outline how you can ensure that your printer is a suitable partner in your efforts to meet your sustainability goals.

Studies¹ consistently show the largest carbon footprint of a major printed product – be it a book, magazine, newspaper or catalogue – comes from the papers those pieces are printed on.

Recognizing that printing is outsourced, this means fulfilling your sustainability commitments generally depends on influencing your suppliers' practices in addition to managing your own. When you choose

leading environmental paper options and printers that possess the knowledge and willingness to work with those papers, you're reducing the risk of controversial forest fiber and high carbon costs making their way into your products and your supply chain. This, in turn, enhances your company's brand equity and helps support reputational risk management.



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The Blueline Report supports consumers of printed materials meet sustainability targets by:

- Helping you identify print partners that you can be confident will provide meaningful environmental solutions
- Providing tools to effectively engage your existing printers to ensure they provide products that meet the standards that your sustainability goals require
- Clarifying meaningful metrics and the essential elements of sustainability action by printers
- Providing case studies of print leadership as well as how other print customers are engaging their print partners to achieve better sustainability outcomes
- Providing you with a dynamic online ranking of printers which will be updated regularly as new information is available

Canopy's extensive work addressing leading procurement policies and engagement on endangered forest conservation in the print sector during the past 11 years has revealed numerous ways in which the industry can help you as well as our forests and climate. But one thing consistently stands out: the need for more transparency in the reporting of sustainability efforts by the print industry.

Transparency is the bedrock on which sustainability assessments must be based. Printers may state a commitment to being "green", with references to the merits of various forest certification schemes and anecdotes outlining their interest in these issues. But your business decisions are predicated on credible facts and deliverables. Is your printer providing enough of them? Any company or sector's claims of sustainability need to be backed with transparent reporting, measurable objectives and information on results. The print industry is no exception.

In this report, we take a close look at all the elements that combine to allow an accurate assessment of meaningful, measurable actions on sustainable printing:

- Do printers have robust Forest Conservation policies in place?
- Are printers reporting in detail on their use of pre and post-consumer recycled paper?
- Do they preference FSC forest certification??
- Are they familiar with, and set up to use, non-wood or straw content papers?
- Are they openly providing information on what forest regions their papers are sourced from?

Your brand's printing choices and active engagement of your printer will help achieve greater transparency in the sector, advance conservation and help you achieve your sustainability goals. This, in turn, ensures a healthier outlook for the world's endangered forests and climate. That's something to stop the presses for!

THE CANOPY INDEX

**> \$USD
30.5 billion**

The combined annual sales
of the printers assessed in this report²

40

The number of North American printers
that have leading paper procurement policies
designed to protect ancient
and endangered forests

16

The number of North American printers
in the top 30 by sales with sustainability content
on their websites

20,500,000

Tonnes of paper used each year in North America
for newspapers, magazines, books, catalogues,
inserts and mailers and other commercial printing³

400,000,000

Number of trees required each year to make
that 20.5 million tonnes of paper⁴

28,389,161

Hectares of forest loss in Canada
between 2001 and 2013⁵

1

Canada moves into the number one position
as global leader in forest degradation.⁶
Indonesia is in first place as the global leader
in deforestation.

70%

the percentage of Woodland Caribou herds
in Canada that are not self-sustaining⁷

> 50%

Loss of historical woodland caribou range
in Canada in the last century due to forestry
and industrial activity⁸

3rd

Indonesia's position globally as largest
greenhouse gas emitter – 80% of emissions
attributed to logging and deforestation⁹

> 440

Number of leading ecopapers developed
between 2002 & 2014 in response
to market demand

40 million

Tonnes of paper recycled annually in the USA¹⁰

> 350

Number of printers and publishers supporting
alternative paper fiber inputs like wheat straw

185,600,000

hectares worldwide certified to FSC¹¹

> 5,000,000

Acres of Great Bear Rainforest habitat
and critical Boreal Forest in the Broadback
that will be conserved in 2015
with active support from major customers

Print Sector Trends Affecting Conservation

PRINT INDUSTRY CONSOLIDATION:

The digital revolution is changing the way newspapers, magazines, fashion and advertising interface with their customers and do business. And as a result, the print industry is changing as well.

The largest of North America's printers continue to consolidate through mergers, restructuring and developing new business units to stay vibrant and competitive. These consolidations concentrate purchasing influence. The resultant economies of scale provide printers with the opportunity to have a greater impact on the protection of endangered forests and drive the development of innovative ecopaper products. As papers are purchased in larger quantities, the opportunity to drive suppliers away from controversial fiber towards sustainable options such as post-consumer recycled, FSC certified and straw-based papers is significantly increased. Given their increased buying power, it also positions these larger printers to secure competitive pricing for these new ecopaper grades.

CORPORATE CONSERVATION INITIATIVES SURGE:

In recent years, forest conservation commitments have become increasingly a foundational pillar of large brands' sustainability efforts. Corporate leaders such as H&M, Disney,¹² 3M, Zara and Sprint have all developed robust paper and forest sourcing policies, adding momentum to a broad market shift away from controversial forestry practices and sourcing regions. This deep shift in marketplace expectations and needs is in turn spurring change throughout the print – paper supply chain. The results: a jump in the hectares of FSC certified forests, logging moratoriums in a number of key conservation hotspots globally and support for green systemic alternatives such as straw based papers. The supply chain shifts catalyzed by large consumer brands are further accelerated when printers have sustainable paper as a core business strategy – as is the case with many of those highlighted in this report.

The result of customer companies' and printers' sustainability efforts is the increased availability and variety of ecopapers for print customers – growing from a handful in 2002 to over 440 today.¹³ Given that "the medium is the message", forest friendly papers and conservation are key performance areas in sustainability.

"Disney is committed to minimizing the consumption of paper, eliminating unwanted sources from our paper supply chain, and maximizing our use of recycled and FSC content papers. We seek suppliers and vendors, including printers, who share our commitment to use and manage natural resources responsibly."

– Dr. Beth Stevens, SVP, Corporate Citizenship, Environment & Conservation, Disney

PRINTERS STEP UP TO THE GREEN LINE:

Over the past five years, Canopy has watched the gap widen between leading printers committed to building and reporting on robust sustainability platforms, and printers that are less willing to prioritize environmental performance. Despite some clear holdouts, there is a lot of good news in terms of printers implementing environmental purchasing policies, catalyzing the development of ecopapers and advancing endangered forest conservation.

In the past 12 months, industry giants like RR Donnelley have taken initial steps to formalize their work to support customers that do not want controversial fiber in their supply chain. Longstanding print sector sustainability leaders such as TC Transcontinental have helped advance on-the-ground conservation by actively supporting protection of the Great Bear Rainforest and the Broadback Forest,¹⁴ an intact jewel in Canada's Boreal forest. EarthColor, Hemlock Printers and Harmony Printing each continue to set the standard when it comes to trialing new environmental papers and engaging suppliers on sustainable forestry practices. Last but by no means least, numerous printers including The Lowe-Martin Group have launched comprehensive paper procurement commitments designed to protect endangered forests at source.

NAKED TRUTH: THE IMPORTANCE OF TRANSPARENCY ON MEASURABLE METRICS

Finally, a shift that has been notable especially in the past five years is the recognition that sustainability reporting is an integral part of building brand value and communicating with customers. It's an important way to assess a corporation's commitment to social and environmental issues and help customers make choices that match their values.

Supply chain analysis becomes challenging when indicators and achievements are not disclosed. Non-disclosure by suppliers or the disclosure of anecdotal efforts, broad generalizations and aspirational goals with no tracking of actual progress, warrants a "buyer beware" situation. The absence of meaningful data stymies print customers' efforts to realize their own sustainability targets as they have no way to verify the sustainability performance of one of their most important supply chain partners.

Claims from printers that are not publicly verifiable or focused on the key performance indicators listed in this report open brands with credible sustainability objectives to risk. As a result, Canopy advocates that companies choose print partners that have robust Forest Conservation Policies in place and transparently report on their sustainability performance metrics.



Inspiring Printers to Join You in Action

In our 15 years of working with companies to help them transform their purchasing impacts and move onto a more sustainable footing to benefit their brands and the world's endangered forests, the Canopy team has witnessed many powerful sectoral shifts. The business adage that "the customer is always right" has definitely driven many positive changes in the paper supply chain during the past 15 years.

Book publishers and authors have been pivotal in sparking a green transformation in the way books are printed globally. Magazines have undertaken trial runs using wheat straw and total chlorine-free recycled pulp to help broker the production of new ecopapers. Many of these papers are

now standard inventory in printers and business supply retailers across North America. Numerous brands have developed progressive partnerships with their printers and Canopy to ensure they are avoiding controversial fiber sources, giving preference to recycled and FSC papers and adding their purchasing clout to on-the-ground forest conservation initiatives. It is because of this kind of engagement that forest hotspots like the Great Bear Rainforest are on the brink of becoming a new global legacy.

Following are two brief case studies of leading brands that are walking the talk, engaging with their printers and advancing their corporate sustainability goals in concrete ways.

Sprinting To the Green Line



In 2011, Sprint's Paper Leadership Council engaged Canopy to collaborate on revisions to its Paper & Print Procurement Policy. During this work, the idea for Sprint's Sustainable Printer Summit was born.

Sprint's first Summit was held in September 2012. The intent was to bring together all of Sprint's printer and paper suppliers, orient them to the company's commitments, and provide guidance and resources to help them comply with the supplier goals that Sprint established. Sprint is looking for 90 % of its suppliers, measured by sourceable spend, to comply with their social and environmental criteria by 2017.

In preparation for the event, Sprint surveyed its printers and discovered that most were well positioned to achieve the printer goals it was setting for them. All of Sprint's printers attended the event held at its headquarters in Kansas City. Speakers covered topics ranging from forest conservation and how to protect endangered forest hot spots to printer sustainability metrics and how to adopt greener practices. Printers left the session with the information they needed to begin implementing robust policies and procedures that would benefit Sprint and their operations. Two printers, Standard Register and Japs-Olson, developed strong forest conservation policies in consultation with Canopy as a result of Sprint's leadership.

The September 2013 Summit had even greater attendance. 60 business partners shared how they had embraced Sprint's printer goals and were implementing them in their operations. As of 2013, 67 % of the company's printers had met its environmental and social criteria.

To learn more about the successes of Sprint's Paper Leadership Council, visit: <http://goodworks.sprint.com/planet/resources/paper-and-printing>

Our supply chain is following our lead. We set clear expectations for our suppliers' environmental, social and economic impacts, and we provide tools, guidance and motivation to meet them.

Sprint's Commitments

- Support sustainable forest management (**Goal: 100 % FSC by 2017**)
- Work with environmentally and socially responsible suppliers (**Goal: 90 % in compliance by 2017**)
- Buy paper with more recycled content (**Goal: 25 % recycled content by 2017**)
- Optimize paper use (**Goal: 40 % reduction by 2017**)

Also:

- Use agricultural residue fiber and chlorine-free options when feasible¹
- Support conservation solutions in forests such as Canada's Boreal and Temperate Rainforests and Indonesia²
- Will not source from illegal logging, controversial, ancient, endangered or high conservation forests

Notes

- ¹ <http://canopyplanet.org/EPD/>
- ² http://canopyplanet.org/news/321/299/Businesses-for-Boreal-conservation/d_blogtemplate/

Sprint's Additional Printer Goals:

- Track, report and set a reduction target for greenhouse gas emissions
- 99 % of paper waste recycled
- 100 % of waste ink, coatings and press wash recycled
- Percent of VOCs in ink:
Sheet ≤ 12 %;
Web ≤ 27.5 %
- Percent of VOCs in coating:
Sheet ≤ 3.1 %;
Web ≤ 2 %
- Lbs/gallon of VOCs in fountain solution:
Sheet & Web ≤ 2.3 gallons
- Lbs/gallon of VOCs in wash solution:
Sheet ≤ 6.19 gallons;
Web ≤ 6.5 gallons
- List of hazardous air pollutants used



Guardian of The Forests: Supply Chain Leadership

theguardian

The Guardian News and Media Group keeps their paper procurement policy relevant and alive through regular updates and reviews. From the newspaper itself, to the flyers and inserts, their policy sets out goals and targets for recycled content and commits to not sourcing from ancient and endangered forests.¹⁵

As described to the audience of the Sustainable Brands UK conference in 2014,¹⁶ a rigorous program of self-evaluation combined with senior management support led to the development of the Guardian policy. This policy has proven to be a critical tool in building leadership and transparency in the company's supply chain.

But even as an international communications icon, the Guardian is just one link in a long complex supply chain. In order to translate policy to action, the Guardian convened a conference in their London offices for their printers and newspaper suppliers.¹⁷

A highlight of this conference was the engagement of other large print users to both inspire and to underline the value proposition for printers. Keynote presentations from Marks & Spencer and B&Q (the largest home improvement and garden center retailer in the UK) served to underscore the business opportunities for printers that can meet their customers' sustainability expectations.

The Guardian is continuing to set high expectations of its suppliers and for itself. It publishes progress on their *Living our Values* site.¹⁸

"We wanted to explore how we might do more to address sustainability goals through collaboration. Our aim was to create an open space where suppliers could talk about their challenges and achievements."

—Bob Steadman, Director of Newsprint Operations at Guardian News and Media

SUSTAINABLE & FOREST FRIENDLY PRINTERS IN

The following matrix highlights key environmental performance areas of leading North American printers in the Top 400 assessed for this report. For a full list please see <http://canopyplanet.org/wp-content/uploads/2016/05/Blueline-Printer-Ranking-April-2016.pdf> If you would like to work with Canopy to update your company assessment please contact: canopy@canopyplanet.org

Last updated: April 2016					FOR LEADERS ON POLICY							
Printer	Canopy Sustainability Rank as of March 31 2016	Canopy Sustainability Rank as of October 30 2015	Canopy Sustainability Rank as of May 26 2015	PI Top 400 2015 ¹	Comprehensive Paper/Forest Resources Policy/Platform and/or Sustainability Section on Web includes language on:							
					Has Comprehensive Public Paper Procurement Policy or Platform ²	Policy/Platform developed with credible ENGO	Advocating for long term forest conservation solutions ³	Protecting endangered forests and species	Distinct Preference for FSC Paper	Distinct Preference for Recycled Content	Preference for TCF or PCF paper	Support for R & D of non-wood papers
EarthColor	1	1	1	24	1	1	1	1	1	1	1	1
TPH The Printing House*	2	4	N/A	67	1	1	1	1	1	1	1	1
Hemlock Printers	2	2	1	172	1	1	1	1	1	1	1	1
TC Transcontinental Printing	4	5	4	4	1	1	1	1	O	1	O	1
Metropolitan Fine Printers*	5	6	11	153	1	1	1	1	1	1	1	1
Arandell Corp	6	15	12	43	1	1	1	1	1	1	1	1
The Lowe-Martin Group	7	7	5	57	1	1	1	1	1	1	1	1
ColorGraphics (A Cenvéo Company)*	8	9	6	33	1	1	1	1	1	1	O	1
Plan It Green Printing	8	8	6	N/A	1	1	1	1	1	1	1	1
IWCO Direct	10	12	18	14	1	1	O	1	1	1	O	O
RR Donnelley	10	12	9	1	1	1	O	1	O	1	1	O
Torstar Printing Group*	10	10	9	13	1	1	1	1	1	1	1	1
St. Joseph Communications	13	12	31	33	1	O	1	1	O	1	O	O
Sandy Alexander	14	25	23	51	NP	NP	NP	NP	NP	NP	NP	NP
Quad/Graphics	15	18	14	2	O	O	O	O	O	O	O	O
Sir Speedy Printing and Marketing Services	15	18	18	19	O	O	O	O	O	1	O	O
Deluxe Corp.	15	18	14	5	O	O	O	O	1	O	O	O
Taylor Communications (Standard Register)***	18	17	16	9	NP	NP	NP	NP	O	NP	O	O
Cenvéo	19	21	17	3	O	O	O	O	O	O	O	O
The Sheridan Group	20	22	18	25	O	O	O	O	O	O	O	O
Command Web Offset Co.	21	25	23	22	O	O	O	O	1	O	O	O
Valassis**	21	25	23	3	O	O	O	O	O	O	O	O
Japs-Olson Company	21	25	23	32	NP	NP	NP	NP	1	NP	O	NP
Trend Offset Printing	24	29	27	16	O	O	O	O	O	O	O	O
Phoenix Color, a division of Visant Corp.	24	30	28	7	O	O	O	O	O	O	O	O
Imagine! Print Solutions	26	30	28	18	O	O	O	O	1	O	O	O
DST Systems Inc.	27	32	31	11	O	O	O	O	O	O	O	O
AlphaGraphics HQ	28	33	28	21	O	O	O	O	O	O	O	O
Ennis Inc.	28	33	31	9	O	O	O	O	O	O	O	O
Allegra Network, a division of Alliance Franchise Brands	28	33	31	15	O	O	O	O	O	O	O	O
SG360	31	37	36	20	O	O	O	O	O	O	O	O

FOOTNOTES

1 <http://www.piworld.com/item/2015-printing-impressions-400-ranking-pdf/>

2 The company has a paper 'platform' (RRD) or a specific policy which usually includes goals to protect endangered forest ecosystems, increase the use of recycled content etc. published on website

3 This means having a policy with language to protect endangered forests and species at source, not generic language about using fiber from legal and certified sources

4 "For example the report provides detail on the percent of FSC paper used since this exceeds the G4-EN2 Indicator: "Report the percentage of recycled input materials used to manufacture the organization's

primary products and services" as outlined in <https://www.globalreporting.org/resource/library/GRIG4-Part1-Reporting-Principles-and-Standard-Disclosures.pdf> Published May 2013"

5 G4 EN12: description of significant impacts of activities, products, and services on biodiversity in protected areas and areas of high biodiversity value outside protected areas

6 G4 EN14: "Total number of IUCN Red List species and National Conservation list species with habitats in areas affected by operations, by level of extinction risk."

The concept of 'Boundary', as defined in the G3 Guidelines, has significantly changed in G4. In G4, organizations are requested to identify and describe where impacts occur for each material Aspect identified. In setting the Aspect Bound-

NORTH AMERICA

	LEADERS ON CSR		FOR FOREST CONSERVATION			LEADERS IN SUPPLY CHAIN SHIFTS				
	CSR Report:		Policy Implementation Actions Reported on Publicly:			Policy Implementation Actions Reported on Publicly:				
Publishes Measurable Goals/Targets and Timelines for Improvement	Publicly Publishes Sustainability/ CSR Report in last 3 years	CSR Report exceeds GRI requirements ⁴	Engagement in forest conservation initiatives	Taken clear steps to eliminate use of endangered forest papers or contentious suppliers?	Taken clear steps to protect biodiversity ⁵ and / or IUCN Red List Species in paper supply chain ⁶	% Increase use of Recycled paper	% Increase use of FSC paper	Participation in trials of new eco-solutions such as straw paper	% Increase use of non-wood papers	ALL points incl. other actions (not shown)
1	1	1	1	1	1	1	1	1	1	28.0
1	1	1	1	1	1	1	1	1	0	25.0
1	1	1	1	1	0	1	1	1	0	25.0
1	1	1	1	0	0	1	1	0	0	20.9
0	0	0	1	1	0	1	0	0	0	18.0
0	0	0	0	0	0	0	0	0	0	17.0
0	1	1	0	0	0	0	0	0	0	16.9
1	0	0	0	0	0	0	0	0	0	15.0
1	0	0	0	0	0	1	1	1	1	15.0
0	0	0	0	0	0	0	0	0	0	13.0
0	1	0	0	0	0	0	0	0	0	13.0
0	0	0	0	0	0	0	1	0	0	13.0
0	0	0	1	0	0	0	0	0	0	12.0
1	1	0	0	0	0	0	0	0	0	9.9
0	0	0	0	0	0	0	0	0	0	7.0
0	0	0	0	0	0	0	0	0	0	7.0
0	0	0	0	0	0	0	0	0	0	7.0
0	0	0	0	0	0	0	0	0	0	6.8
0	0	0	0	0	0	0	0	0	0	5.9
0	0	0	0	0	0	0	0	0	0	5.0
0	0	0	0	0	0	0	0	0	0	4.0
0	0	0	0	0	0	0	0	0	0	4.0
0	0	0	0	0	0	0	0	0	0	4.0
0	0	0	0	0	0	0	0	0	0	3.0
0	0	0	0	0	0	0	0	0	0	2.0
0	0	0	0	0	0	0	0	0	0	2.0
0	0	0	0	0	0	0	0	0	0	1.5
0	0	0	0	0	0	0	0	0	0	1.0
0	0	0	0	0	0	0	0	0	0	1.0
0	0	0	0	0	0	0	0	0	0	1.0
0	0	0	0	0	0	0	0	0	0	0.0

aries, an organization should consider impacts within and outside of the organization.”

NP Company has a policy that is not posted publicly

* Torstar Printing Group, ColorGraphics Division of Cenveo, The Printing House, and MET Fine Printing do not appear on the PI Top 400 list though their annual sales put them in the Top 400, as indicated

** Valassis is not on PI 2014 or 2015 list, in 2013 they were #3

*** Taylor Communications/Standard Register is not listed in the PI Top 400 for 2015. In 2014 Standard Register ranked 9.

2015 SUSTAINABLE PRINTER ASSESSMENTS

TOP 10 RANKED SUSTAINABLE & FOREST FRIENDLY PRINTERS IN NORTH AMERICA

Printer	Sustainability Ranking	Ranking by Annual Sales
EarthColor	1	26
Hemlock Printers	1	166
Harmony Printing	3	393
TC Transcontinental	4	4
The Lowe-Martin Group	5	54
Plan It Green Printing	6	n/a
ColorGraphics / Cenveo	7	33
Ashford Design	8	n/a
RR Donnelley	9	1
Torstar Printing Group	9	13

For the full list of printers assessed for their sustainability and forest conservation performance, see the table on pages 10/11.

THE "BLUELINE" CHECK LIST FOR PRINTERS

Engage your printer to:

1. Develop a leading Forest Conservation Policy with a credible environmental organization (ENGO). The policy should include the elements listed at <http://canopyplanet.org/business/commercial-printers/>
2. Report transparently on their sustainability actions, including measurable goals and progress towards achieving them.
3. Ensure they are not sourcing paper from endangered forests or controversial sources.
4. Ensure that they are helping you meet your targets on recycled content and FSC certified fiber.
5. Engage their other customers in the development of sustainable printing policy requirements and educate their clients on copaper attributes.
6. Work with a credible ENGO such as Canopy to help stimulate the development of new copaper options, improve the on-the-ground practices of forestry companies and advance conservation legacies.

	Leaders on Eco-Policy ^{19, 20}	Leaders in Supply Chain Improvements ²¹	Forest Conservation Engagement Leaders ²²	Leaders in Corporate Social Responsibility Reporting ²³
Greater than \$275 million in sales ²⁴	Torstar Printing Group, TC Transcontinental, RR Donnelley	TC Transcontinental	TC Transcontinental, Torstar	TC Transcontinental, RR Donnelley, Standard Register
Greater than \$100 million in sales ²⁵	EarthColor, ColorGraphics, Command Web Offset	EarthColor	EarthColor	EarthColor
Greater than \$5 million in sales ²⁶	Hemlock, Harmony Printing, The Lowe-Martin Group, MET Fine Printers	Hemlock, Harmony Printing	Harmony Printing, Hemlock	Hemlock, The Lowe-Martin Group
Less than \$5 million in sales	Ashford Design, Plan It Green, Sprint Denver, Mercer Color Green Solutions Printing	Plan It Green, Ashford Design		Sprint Denver

PRINTERS WITH NO PUBLIC SUSTAINABILITY INITIATIVES:

The following printers had no public information on paper procurement policies or sustainability initiatives available at the time of publication:

- Ennis Inc.
- Alliance Franchise Brands (Allegra Network division)
- SG360
- Belmark Inc.

Recommendation: This lack of information about their sustainability initiatives and performance creates significant reputational risk for those choosing these print partners. Seek out printers with stronger public track records of sustainability whilst you encourage these printers to give greater priority to environmental performance.

COLLABORATING ON SOLUTIONS

If your printer has no sustainability content on their website or substantial improvement is required it's clearly time for a discussion with them. Canopy can help. Years of experience working with printers, the paper supply chain and large print customers enables us to guide you, and your printer, through the complex terrain of conflicting claims, environmental and technical performance of various paper grades and the endless possibilities of environmental choices. We can identify areas where your current printer can make improvements to help advance your sustainability goals and support them to develop robust environmental initiatives.

PRINTERS NEEDING SUBSTANTIAL IMPROVEMENT:

North America's top 30 printers are strong business performers, and more than 25% of them are implementing and publicly reporting on robust paper procurement policies. Given that trend, it is notable that the following printers are currently not providing meaningful information of their sustainability actions or their sustainability efforts and/or their environmental policies seem to lack significant rigor. Printers in this category include:

- Quad/Graphics
- Cenveo
- Valassis
- Deluxe Corp
- Visant Corp.
(Phoenix Color, a division of)
- Sir Speedy Printing and Marketing Services
- Trend Offset Printing
- Command Web Offset Co.
- Arandell Corp
- AlphaGraphics
- DST Systems
- Imagine! Print Solutions
- The Sheridan Group

Recommendation: If you are working with any of these printers, encourage the development of a strong policy and meaningful implementation to ensure they are mitigating your risk and meeting your sustainability expectations. Or consider working with a printer that will.

OTHER SHADES OF GREEN:

In terms of other green initiatives that printers are active on, many are addressing:

- An energy management plan including renewable energy plans²⁷ and GHG reduction strategies²⁸
- Water conservation initiatives
- Management programs for VOCs, HAPs and/or other chemicals
- Recycling and manufacturing waste programs
- Broad sustainability issues via their company website

The following printers ranked highest for Other Shades of Green Initiatives.

Greater than \$USD 275 million in sales:

- TC Transcontinental, Quad/Graphics, RR Donnelley, Deluxe Corp.

Greater than \$USD 100 million in sales:

- EarthColor, Arandell Corp., ColorGraphics, The Sheridan Group

Greater than \$USD 5 million in sales:

- Hemlock Printers, Harmony Printing, The Lowe-Martin Group, MET Fine Printers

PRINTER PROFILES: *Shining a Light on the Actions*

TC Transcontinental: Credible Performance Improvement



TC Transcontinental, the fourth²⁹ largest printer in North America, has been working cooperatively with Canopy since 2003. Initially, we collaborated to print various titles on 100 % recycled Ancient Forest Friendly™ paper and as we worked together, TC Transcontinental's support for, and use of, ecopaper grew rapidly.

In October 2007 that collaboration led to the company publishing its first ecopaper purchasing policy, which was updated in 2012. The policy continues to include a paper hierarchy, which states a top-level preference for domestically produced 100 % recycled papers. TC Transcontinental's policy applies to all its business divisions and was recognized by the "WhatTheyThink Environmental Innovation Awards" as an 'Environmental Thought Leader'. The judges drew specific attention to the company's work to implement the paper purchasing policy developed with Canopy, including surpassing ecopaper purchasing targets put in place to ensure policy implementation.

TC Transcontinental has supported the research and development of straw papers via Canopy's straw market survey, and publishes an annual Corporate Social Responsibility report. Their 2013 and 2014 reports show a year over year increase of recycled and FSC paper use. Recycled paper use more than tripled between 2013 and 2014, while FSC certified paper use went from 43 % in 2013 to 54 % in 2014.

François Olivier, TC Transcontinental's President and CEO, is a strong champion for environmental leadership within TC and his supply chain. He leads by example and has successfully encouraged other CEOs to adopt similar positions. Mr. Olivier reaches beyond his supply chain to personally advance conservation in key ecological hotspots of Canada's Boreal Forest and beyond. In 2014 Mr. Olivier delivered the keynote at a critical meeting of forest product customers gathered to advance conservation in the Broadback Forest, a key area of Canada's Boreal Forest.

TC Transcontinental's path to ecopaper leadership and the role its senior leadership has played in the company's sustainability initiatives show the role that North America's largest printers can have in setting the bar for environmental performance while maintaining a strong market share and maintaining annual sales.

EarthColor: Proof of Concept



The EarthColor~Canopy collaboration is proof that printers in North America can play an active and vital role for the forests by facilitating meaningful change in the print industry while also serving as a model for corporate/environmental non-profit collaboration.

EarthColor's actions, stemming from our 6-year partnership, validate Canopy's philosophy that business leaders can be a powerful force for environmental change. Our partnership to date has resulted in many of Canopy's recommended solutions translating to commercial scale reality.

Never shying away from advocating for our global forests, EarthColor has shown market support for large scale protected area proposals in forests ecosystems such as the Great Bear Rainforest in British Columbia's Coastal Temperate Rainforest, the Broadback Forest in Canada's Boreal and the Leuser Ecosystem in Indonesia's Rainforest.

The company's FSC paper use has gone from 48 % annually to 65 % of total paper purchased in 2014.

Most noteworthy, EarthColor is leading US printers in supporting the research and development of papers made with agricultural residues such as wheat straw. Through EarthColor leadership, many Fortune 500 companies are able to print on straw paper – identified by leading life cycle studies as a lower footprint alternative to papers made with virgin fiber from endangered forests.

Hemlock: Inspiring Supply Chain Innovations



When it comes to innovation in the supply chain, Hemlock Printers is on a roll – always on the 'look out to push print and sustainability boundaries'.³⁰ In January 2004, Hemlock Printers became the first printing company in the Pacific Northwest to receive FSC Chain-of-Custody certification. A year later the printer became the first in North America to develop and adopt an overarching Ancient Forest Friendly™ policy with Canopy – a policy the company just updated to celebrate its 10th anniversary.³¹

For over a decade, Hemlock has led with an admirable degree of transparency and an impressive list of paper supply chain innovations. Initially, the company co-hosted a green paper seminar, trained sales reps to promote papers with environmental attributes and started including an ecological audit for different paper choices as part of its everyday quoting process. After conducting a carbon footprint study, Hemlock also developed its own carbon-offset program called "Zero".

Today, Hemlock still stands as a model for all printers in the area of innovation. For example, in 2014 the company designed an exclusive 100 % Post Consumer Waste (PCW) text and cover sheet with Neenah, one of the mills in North America offering a range of 100 % recycled grades. The sales of this innovative sheet also result in carbon offsets by forwarding conservation areas in the Great Bear Rainforest with revenue going to First Nations through the company's offset program.³² Hemlock presented at the renowned Globe conference³³ to promote the availability of Step Forward™ a 60 % wheat straw paper.³⁴

These two programs are exactly the kind of innovative leadership Canopy likes to inspire and applaud. Hemlock is taking steps that support print customers goals in advancing corporate sustainability, diversify the supply chain by supporting recycled and straw paper and advance endangered forest protection by showcasing alternatives to paper made from 100 % virgin fiber sources and resourcing conservation through carbon credits.

Harmony: Bringing their Clients With Them



Harmony is a long-standing leader when it comes to offering cutting-edge ecopapers to clients. This leadership is driven by the company's recognition of the true cost of paper use and their desire and commitment to reduce their footprint on ancient and endangered forests. Not only does Harmony know how to ask the right questions in the paper supply chain, they are willing to share the facts with their clients.

To reduce the stress on endangered forest ecosystems and the climate, Harmony offers ecopaper from mills that lead on FSC and 'Ancient Forest Friendly™' 100 % recycled chlorine free paper, as well as paper from mills that lead with low carbon alternatives such as biogas energy. They test straw papers and even created a great video about what it means to be Ancient Forest Friendly.

One of Harmony's core principles is transparently supporting large-scale protected areas in endangered forests through government and supplier engagement. They are also committed to avoiding fiber for paper that is being sourced from endangered forests including critical Boreal Forest and threatened woodland caribou habitat.

Harmony has recently updated their Ancient Forest Friendly Policy, developed with Canopy in 2009.

Seeing the Forest Through the Trees – A New Level of Transparency for our Forests

THE PAST YEAR MARKED SIGNIFICANT GLOBAL ATTENTION ON THE WORLD'S FORESTS.

Corporations and business were taking action, global satellite forest maps were unveiled and transparent reporting on corporate progress in addressing forest issues was compiled and made publicly available. Initiatives included the September 2014 United Nations' New York Declaration on Forests, which witnessed numerous corporations and governments calling for an end to deforestation. Just months later, spurred on by shareholder interest, The Forest 500 list was launched, ranking companies based on their leadership on forests as drawn from transparent public reporting.

Parallel to these initiatives, real time information about our forests is now accessible to anyone. The Global Forest Watch program, together with powerful partners including Google and NASA, created a real time, online forest monitoring and alert platform for the world's forests. This program and associated research in 2014 has revealed global forest loss increased by nearly a third since the early 2000s, with loss in the world's Boreal Forest occurring at the fastest pace, rising nearly 50% in 13 years.

In response to this momentum, we have seen many new large paper consuming companies committing to stop sourcing raw materials from ancient and endangered forests as a core sustainability initiative. These commitments are having a significant impact on the future of threatened forests. Printers and print consumers are playing an enormous role in the global movement to protect the world's remaining endangered forests.

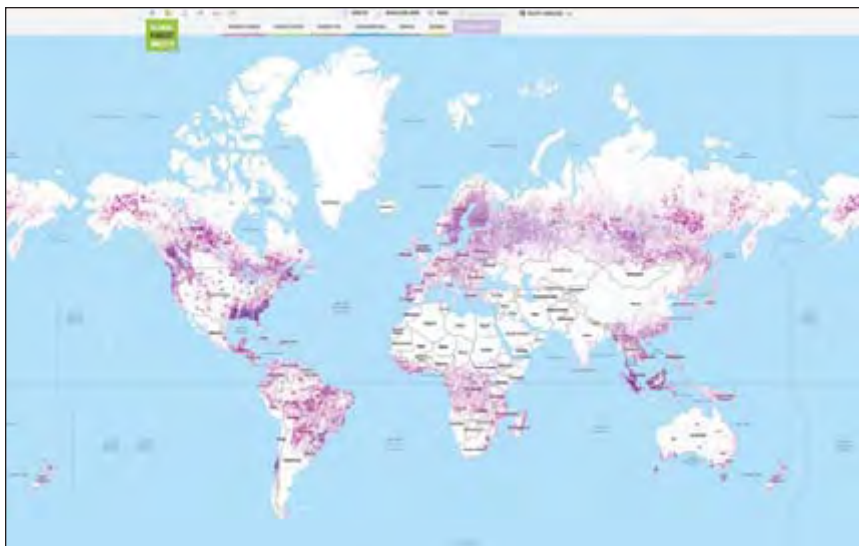


image: © Global Forest Watch



photo: RAN / David Gilbert

SUPPORTING FOREST CONSERVATION

Awareness about the loss of ancient and endangered forests and the increase in corporate commitments to scrutinize the origin of their raw material are both on the rise. However, it takes time to create the structural shifts in the value chain and develop commercially viable alternative fibers and papers. While new environmental friendly products and systems are developed, companies can have an immediate positive impact by supporting conservation solutions already underway for rare and threatened forest ecosystems.

Following are a few forest regions where a real difference can be made with timely support from you and your printers. Be part of creating a legacy – lend your voice to support the conservation of these endangered forests.

BROADBACK FOREST, CANADA'S BOREAL FOREST

Canada and Russia, home to the largest intact tracts of Boreal Forest are the current setting for the highest rates of forest degradation. In 2012 and 2013, forest lost in these countries amounted to ~37 million acres (15.1 million hectares) – an area the size of the State of Florida. Less than 12 % of Canada's Boreal Forests are protected and the vast majority of logging is occurring in forests that have *never* been logged before.

Today, The Broadback Forest is one of the most promising opportunities to advance the conservation of Canada's Boreal Forest. A thriving ecosystem of lakes, rivers and old growth spruce and pine forests, the Broadback watershed covers more than 5.1 million acres (2.02 million hectares). Home to Cree First Nations communities, threatened caribou herds and numerous forest-dependent species, the Broadback is described as the last frontier of intact Boreal Forest in the province of Quebec.

Powerful interests have aligned in support of conservation, with remarkable cohesion between typically divergent parties. The Cree Nations have prioritized an area totaling 3.2 million acres as a core protected area. Most logging companies in the region have agreed to a temporary deferral on industrial activity. Environmental organizations, scientists and economic stakeholders have voiced their support for action to secure a healthy future for the Broadback. All that's needed now is for the Quebec government to finalize the protected area proposal for this region.

Seeing the Forest for the Trees – A New Level of Transparency for our Forests (continued)

LEUSER ECOSYSTEM, SUMATRA, INDONESIA

The Leuser Ecosystem is a critical forest region serving as a buffer zone surrounding Gunung Leuser National Park in the provinces of Aceh and North Sumatra, Indonesia. Covering more than 6.4 million acres (2.4 million hectares) it is one of the richest expanses of tropical rainforest in Southeast Asia and the last place on earth where the Sumatran elephant, rhinoceros, tiger, sun bear and orang-utan are all found within one area.³⁵

The Leuser is located north of the controversial PT Toba Pulp Lestari pulp mill, an affiliate of the Royal Golden Eagle Group of companies. The Toba Pulp mill produces paper grade pulp as well as dissolving pulp for cellulosic fabrics.³⁶ While it is currently unclear whether the mill is directly sourcing fiber from the Leuser Ecosystem, it is sourcing from critical hotspots that are immediately adjacent to the region and is embroiled in controversy over continued reported use of Indonesia's tropical hardwoods and its repeated conflicts with local villagers around the logging of traditional lands.

A controversial land use plan by the Aceh government is slated to open the nationally protected Leuser Ecosystem to industrial development and threaten Sumatra's last remaining lowland forests and biodiversity. This area is now on the precipice and encouragement from the marketplace is needed. Partner companies have already taken a leadership role, including some that are featured in this report, voicing their support for lasting protection for this global treasure.

GREAT BEAR RAINFOREST, CANADA'S WEST COAST TEMPERATE RAINFORESTS

The Great Bear Rainforest is the largest remaining tract of unspoiled temperate coastal rainforest left in the world. Home to ancient forests of 1,000 year old cedars and 300 foot tall spruce, this forest is best known for its rare white Spirit Bears, grizzly and black bears that feast in clear, mountain-fed streams teeming with salmon. Over 70 % of the region's population is First Nations peoples whose histories, identities, spirituality – and livelihoods – are inextricably linked to the lands and waters of the rainforest.

In 2006, the Government of British Columbia and First Nations took unanimous recommendations from environmental organizations and forest companies and protected one third of the rainforest with a commitment to implement human wellbeing and ecological elements of a new system called Ecosystem-based Management. Today, 50 % of the region is formally protected or off-limits to logging and the final stage of conservation is expected to be finalized this summer. This final legislative step should see 70 % of the region maintained in old growth – scientists say this will allow for the rainforest to be managed at low risk to ecosystem integrity. A lasting conservation solution.

Once this meaningful solution is in place Canopy is looking to many of the same players to protect the last remaining coastal temperate rainforest hotspots on nearby Vancouver Island. We have obtained preliminary supportive responses from mills in the region looking to transition to second growth fiber.

Opportunities for Engagement: Support these amazing conservation legacies by joining one of several tailored customer initiatives. Contact Canopy for more details: canopy@canopyplanet.org



SIX STEPS TO WORKING WITH YOUR PRINT SUPPLIERS TO PROTECT FORESTS:

- 1 Develop a comprehensive Forest Conservation Policy designed to protect ancient and endangered forests and mitigate the risk of buying from controversial sources
- 2 Ensure that the ecological specifications of the paper your company purchases meet or exceed the objectives of your sustainability policy.
- 3 Work with a credible NGO such as Canopy to develop/update your purchasing policy, engage your suppliers and help advance conservation in global hotspots.
- 4 Meet and/or hold a conference with your paper suppliers or printers to ensure that they are advancing meaningful conservation planning, avoiding fiber from high carbon and high conservation value forest hotspots, are maximizing their sourcing of recycled and FSC content, and providing you with the best possible ecopaper choices
- 5 Include language specifying your sustainability objectives in contracts with your print providers to ensure they will help your company achieve your goals.
- 6 Explore the opportunity to use non-wood fibers in your printing. Straw-based papers are an elegant solution that will elevate your company to the head of the sustainability class.

ABOUT THE BLUELINE CONSUMER GUIDE

This ranking is focused on leadership in the areas of paper procurement policies, forest sourcing, paper supply chain shifts and forest conservation. A key rationale for this focus is that leading carbon footprint studies³⁷ continue to show up to 79% of the carbon footprint of a major printed product is associated with the paper manufacturing process.

Furthermore, intact tracts of undisturbed ancient forests, soils and ecosystems are a massive storehouse of carbon, absorbing huge volumes of CO₂ from the atmosphere – a vital ecosystem service dismantled by the harvesting of trees for paper production.

The printers assessed for this report include:

- Top 30 largest North American commercial printers³⁸ (except those who do not have a significant use of paper – such as label printers).
- Printing Impressions Top 400 printers that have policies with Canopy, and
- Printers that voluntarily completed Canopy's printer survey and specifically requested to be included in this report.

This report presents a summary of the transparent forest conservation and paper procurement reporting that is publicly available on the websites of North America's largest printers.

All assessments are based on information that was publicly posted to company website at the time of writing this report. One point was given to each criterion. For example if the printer has a sustainability section on the company website, that is a yes = 1. We let all printers know they were being assessed. Each printer had an opportunity to update web content in order to maximize their score in this assessment and each printer received a copy of their assessment at least 8 – 10 weeks before publication to review and provide feedback and/or additional information.

To see how your printer performs in key areas of environmental performance and ranks relative to their peers, please visit <http://canopyplanet.org/business/commercial-printers/blue-line-report-2015/>

ABOUT CANOPY

Canopy is a not-for-profit environmental organization dedicated to protecting forests, species and climate. Canopy collaborates with more than 750 companies to develop innovative solutions, make their supply chains more sustainable and help protect our world's remaining ancient and endangered forests. Canopy's partners

include H & M, Sprint, Penguin – Random House, Zara/Inditex, TC Transcontinental, *The Globe and Mail* and Scholastic. Canopy's work relies on the support of individual donors who share our passion for the planet.

Engage with Canopy to advance business solutions and forest conservation.

- 1 *National Geographic* 2009, *Time*, *InStyle*, *Backpacker* and The US Book Industry carbon footprint studies: 48–79% of the carbon footprint is attributed to paper production, while 4–17% is attributed to printing.
- 2 Printing Impressions Top 400, 2014 and company sources.
- 3 RISI World Pulp Annual Historical Data 2010 for magazines, books, catalogues, inserts and mailers and other commercial printing. RISI 2015 for newsprint cited from: <http://www.theglobeandmail.com/report-on-business/north-american-newsprint-production-cuts-continue/article22608050/>
- 4 Environmental impact estimates were made using the Environmental Paper Network Paper Calculator Version 3.2. For more information visit www.papercalculator.org (Assuming 100 percent virgin paper use with no pre or post consumer recycled content.)
- 5 <http://www.globalforestwatch.org/country/CAN>
- 6 Canada.com. Sept. 4, 2014. Canada leads world in forest decline, report says. William Marsden. Report by Global Forest Watch and World Resources Institute.
- 7 *Population Critical: How are Caribou Faring?*, December 2013, CPAWS and David Suzuki Foundation. http://cpaws.org/uploads/BorealCaribouReport-CPAWS_DSf.pdf
- 8 Hummel, M. and J. Ray. *Caribou and the North: A Shared Future*. Toronto: Dundurn Press, 2008.
- 9 *Indonesia and Climate Change: Current Status and Policies*, World Bank 2007
- 10 <http://www.epa.gov/osw/conservation/materials/paper/faqs.htm>
- 11 <https://ca.fsc.org/facts-figures.220.htm>
- 12 <http://www.scientificamerican.com/article/can-disneys-new-paper-rules-help-save-rainforests>
- 13 <http://canopyplanet.org/EPD/>
- 14 <http://canopyplanet.org/news/321/299/Businesses-for-Boreal-conservation/d,blogtemplate/>
- 15 Guardian Media Group. Paper Policy. <http://static.guim.co.uk/ni/1387293319461/GMGpaperpolicy2013.pdf?guni=comp:%20r2:%20factbox%20trackable-component%20blank:Position>
- 16 *Sustainable Brands*. #SB14London: The Value of Deeper Collaboration to End Deforestation. November 5, 2014. by David Harding-Brown.
- 17 *The Guardian*. Chris Hodgson and Dave Kirwan. How can the Guardian's supply chain make newspapers more sustainable? May 28th, 2014. <http://www.theguardian.com/sustainability/sustainability-report-2014-footprint>
- 18 Living our Values website: <http://www.theguardian.com/sustainability>
- 19 RR Donnelley calls their content a 'platform' while it's referred to a policy everywhere else through this report.
- 20 Printers were assessed on publicly available information in the following categories: Having a comprehensive paper policy or platform, developed with a credible ENGO, that advocates for long term forest conservation solutions, protecting endangered forests and species, a distinct preference for FSC certified paper, recycled content, TCF and PCF bleaching, non-wood fibers and publishing measurable goals and targets with timelines for improvement.
- 21 Printers were assessed on publicly available information in the following categories: Reporting a percent increase in the use of recycled, FSC certified and non-wood papers and participation in straw paper trails.
- 22 Printers were assessed on publicly available information in the following categories: Reporting on engagement on forest conservation initiatives, taking clear steps to eliminate the use of paper from endangered forests and contentious suppliers, taking clear steps to protect biodiversity and/or IUCN Red List Species in paper supply chain.
- 23 Printers were assessed on publicly available information in the following categories: publicly publishing a sustainability/CSR report that exceeds GRI guidelines.
- 24 Represents the 20 largest printers in North America, ranked by score in each area with the top printer scoring the highest.
- 25 Represents printers 21 through 50 in sales in North America, ranked by score in each area with the top printer scoring the highest.
- 26 Represents printers 51 through 400 in sales in North America, ranked by score in each area with the top printer scoring the highest.
- 27 This can include green power programs like Bullfrog Power in Canada or Green-E certification and the EPA Green Power program.
- 28 Includes Carbon Disclosure Project Reporting, Carbon Reduction Programs like Hemlock's Zero Program.
- 29 <http://www.piworld.com/article/printing-impressions-2014-ranking-leading-commercial-printing-companies/>
- 30 <http://blog.hemlock.com/2014/09/hemlock-introduces-coronado-sst-100/>
- 31 <http://blog.hemlock.com/2015/04/hemlock-renews-its-commitment-to-ancient-endangered-forests/>
- 32 <http://blog.hemlock.com/2014/09/hemlock-introduces-coronado-sst-100/>
- 33 <http://2014.globeseries.com/home/about/globe-group/>
- 34 <http://blog.hemlock.com/2014/03/richards-report-2014-globe-conference/>
- 35 Robertson, Y. 2002. *A Briefing Document on Road Network Through the Leuser Ecosystem*. Cambridge University.
- 36 USAID. August 2009. Private Sector Sustainability Facility. PSSF Site Threats. Evaluation of Threats to Orang-utan and Priority Interventions to abate these threats at PSSF Focused Sites in North Sumatra and East Kalimantan. Prepared by the Orangutan Conservation Services Program. USAID Contract: 497-C-00-07-00016-00.
- 37 *National Geographic* 2009, *Time*, *InStyle*, *Backpacker* and The US Book Industry carbon footprint studies: 48–79% of the carbon footprint is attributed to paper production, while 4–17% is attributed to printing.
- 38 By Sales – Print Impressions Top 400, 2014.



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