



## **Sustainability is an integral part of the paper tissue value chain**

### ***Industry's continued ambition is to drive sustainable hygiene and human health***

*Industry veteran Roberto Berardi of the European Tissue Symposium explains how the sector is taking steps to stay ahead of the curve in meeting the challenges of sustainability*

When you work in an industry that relies on forests for its base material then you naturally think long term. Business sustainability is a way of life in the European tissue industry where trees can have a growing cycle of up to 50 years. Europe has some of the most advanced forestry management systems in the world and performs well against a range of sustainability criteria. The goal of the tissue industry is to not only drive the adoption of ever-greater sustainability practices within our own sector, but to be an integral part of driving sustainable hygiene and human health throughout Europe. Sustainability must become a way of life.

Before elaborating on some of the initiatives the industry is taking I should clearly define the concept of 'sustainable business'. Sustainability is often described as having three pillars: social, environmental and economic. I agree of course but my preferred definition is one I learned in a seminar at Harvard Business School a few years ago where Sustainability was defined as Leadership and Responsibility. A business must set its direction placing the principles of sustainability at its very heart: its purpose, mission, strategy, goals, values and responsibilities. It must then create a corporate context and culture in which its actions are economically, legally and ethically sound.

By meeting each of these three criteria in all of its business actions an organisation can legitimately claim to be sustainable. And indeed as we have already seen, ethical requirements frequently become legal requirements over time as societal opinion moves to embrace a more sustainable approach to the way we do business.

This is ultimately in agreement with the Brundtland Commission's mission to unite countries to pursue sustainable development together. Development that meets the needs of the present without compromising the ability of future generations to meet their own needs. .

### ***So how is the European Tissue industry shaping up?***

The sector is working continuously to increase its sustainability across a host of different areas including recycling, recovery, transport, water and workplace safety. There are some well-established initiatives and also some exciting new projects being developed and likely to herald the future direction for the sector.

### ***Forest certification – a crucial development in demonstrating our sustainable credentials***

We are immensely proud of our most recent initiative in the area of Forest Certification. This is a crucial development for the sector and offers reassurance to our customers and consumers while also lending further credibility to the sector.

ETS supports the use of fibres from sustainably and legally managed forests and encourages the use of third party certification as one of the best ways to ensure that suppliers meet these requirements. We do not favour any single scheme but support the various international and national Forest Certification schemes that offer third party verification or certification of compliance. Customers have welcomed the certification of fibres and we are committed to supporting the sustainable management of forests based on responsible forest management, social responsibility

and economic viability. We also encourage the development of standards, performance measures, and continual improvement in best practices for forest ecosystems.

We use the definition of ‘Sustainable Forest Management’ agreed at the Second Ministerial Conference on the Protection of Forests in Europe, held in Helsinki in 1993: *“The stewardship and use of forests and forest lands in a way and at a rate that maintains their biodiversity, productivity, regeneration capacity, vitality and their potential to fulfil now and in the future, relevant ecological, economic and social functions at local, national and global levels, and that does not cause damage to other eco-systems.”*

ETS has particularly welcomed the new EU Timber Regulation which came into force in 2013 and ensures that only products from legally sourced wood are sold across the EU28. The members of ETS have for some years committed to using only fibres from legal and sustainable sources.

### ***Exploring opportunities in recycling and recovery***

Europe leads the world in paper recycling with levels at over 70% in 2012<sup>1</sup>– up from 40% in 1995. While paper consumption levels are the same today as in 1998, recycling levels are 150% higher. In Europe, a paper fibre is collected and recycled on average 3.5 times, compared with just 2.4 times worldwide. ETS are members of the European Recovered Paper Council, committed to meet a voluntary recycling target of 70% in the EU +Switzerland and Norway by 2015 – higher than any other region in the world.

I should stress though that Lifecycle analysis studies (LCA) show sustainable tissue products can be produced with both recovered and new fibres and that each has its benefits and shortcomings. Experts have carried out carbon footprint studies on toilet tissue that prove that the decision to use either fibre type does not significantly alter the carbon footprint and that neither fibre type can be considered environmentally preferable when considering carbon emissions.<sup>2</sup>

Total environmental impacts depend on a number of factors including location of the mill, closeness of available fibres, energy options and production waste utilisation and these should be reviewed on a case by case basis. It is for this reason that we advocate a total lifecycle approach to understand the environmental impact of our products. We are not in favour of carbon footprint labelling for our products as it measures just one environmental impact and so can be potentially misleading for consumers. However we are following with great interest the EU project to establish Product and Organisation environmental footprints as these should encompass all the environment impacts and overcome the weakness in carbon footprinting.

Thanks to sophisticated new technologies the tissue industry increasingly uses recycled fibres in products without compromising on softness, strength and absorbency. Companies are innovating using recycled fibres or environmentally friendly fibres from plants that grow well and are able to offer products that are similar to virgin fibre ones.

The very latest development is that industry leaders are actively exploring opportunities to recycle paper towels. Research is ongoing but could lead to some exciting breakthroughs for our industry in contributing to Europe’s status as paper recycling world champion.

### ***Driving waste minimization***

The most effective way to recover used materials is to not generate waste in the first place. A great deal of work is being undertaken in paper mills across Europe to minimize wastage

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<sup>1</sup> CEPI

<sup>2</sup> Carbon footprint of toilet tissue paper: Comparison of toilet tissue using 100% fresh fibre pulp and 100% recovered fibre pulp. Authors: Catharina Hohenthal and Katri Behm, March 2009

- in the production processes, in the cutting of the paper, and in the way machinery and forklifts are used. Efforts seek to minimise damage and hence wastage in the handling of tissue products and the industry is also developing more absorbent products which hence reduce usage.

Conservation of water is a key global concern and companies in the tissue sector increasingly operate fully closed production loops to reuse water – although they have to evaluate whether this is the most cost-efficient option in the more water abundant countries of northern Europe.

### ***Upholding sustainability in the workplace***

Safety in the workplace is a fundamental prerequisite of sustainability - and a legal and ethical obligation. Upholding optimal safety is rooted in respect and if employees believe that management is placing safety as a number one priority then they will be motivated and work well. The result is a virtuous circle for a company's prosperity. The implementation of values and practices that guarantee optimal safety standards is rooted in the psyche of not just the tissue industry but of its main suppliers too and we are proud of the safety standards that we uphold.

### ***So what's next for the tissue sector?***

Trade customers and consumers are increasingly aware of the need to save and conserve. They are particularly keen on packaging reduction and industry members have taken a number of initiatives to make products more compact. This pleases retailers as they take up less space on-shelf in store, and pleases customers as they are less bulky to store at home. Larger rolls - twice the length of a standard roll – which save on packaging, transport and storage costs, have been available for a number of years too and are now being extended more widely including into private label

ETS has also undertaken transport studies to look at truck utilisation and content optimisation in order to be more economic and energy efficient. And the industry hasn't stopped there. We also look at recycled plastics for the outer wrappings to ensure that every stage of the production chain is conscious of the impact it has on the environment.

Looking to the future our industry will continue to push the boundaries in re-utilisation techniques and even surpass some of the excellent work that is being done today. I believe we will develop ever more efficient and effective paper production and converting technology and perhaps machines will be more compact so located closer to the final customer.

I would also hope that we will work to further limit our energy waste, promote renewable sources and reduce the miles travelled by our products. Some promising new work is taking place in the area of wind energy generation already with wind turbines being cited in forests on the tops of hills where they are away from people and in low-yield locations.

My dream of course is that future innovations will provide the planet with unlimited quantities of low cost, low impact energy. This would enable us to develop the ideal toilet roll: soft, absorbent, resistant, very long, pleasantly decorated, made with recycled fibres and at a price that is accessible to the vast majority of people.

I am excited about what we have achieved so far in driving the principles of sustainability throughout our sector. And I am optimistic about the future and where innovation and a determination to do even better can lead us. But we are not complacent. The European tissue industry is committed to helping people to achieve a better quality of life by delivering optimal hygiene that supports human health. Unless we are able to improve, or at the very least uphold our standards of excellent, then we cannot justify the term 'sustainable'.

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