



NORTH AMERICA'S 2013 GREEN PRINT LEADERSHIP REPORT

*Find out how green
your printer is here!*

**Three of North America's Top
Five Printers Have Responded—
Look inside to find out more!**



canopy





Are your printers responding to the growing demand for green print services?

WE ALL KNOW THAT PAPER USE IS DOWN AND CUSTOMER NEEDS ARE SHIFTING. IT'S AN UNCERTAIN TIME FOR PRINTERS. ONLY THOSE PREPARED TO ADAPT WILL ENDURE, AND THOSE WHO LEAD THE CHANGE WILL THRIVE.

Printing is now about more than just numbers and that means value is shifting to the quality print job. Diminishing forests and controversial fiber are forcing consideration of a range of paper specifications in addition to price and availability. Business certainty and confidence in a supply that meets corporate CSR mandates is important.

Today more and more customers see the paper they use as part of the message they're sending. The environmental pedigree of your papers, and the environmental reputation of your brand are assets that can set you apart from your competitors.

Canopy works collaboratively with more than 700 companies to develop and implement paper procurement policies that meet business needs while enhancing brand reputation by supporting protection for ancient and endangered forests.

Our list of partners includes ***Sprint, Time, Scholastic, Random House, Hearst, Harlequin*** and many others who increasingly require green print services in order to meet their own sustainability targets.

North America's 2013 Green Print Leadership Report from Canopy lets you select your printing partners to gain market and customer recognition. The right printer can maximize the brand benefit of your sustainability efforts.



Want to know what it takes to make next year's Report? Contact Canopy at: neva@canopyplanet.org 604-817-4974 or marcus@canopyplanet.org 416-644-1021 www.canopyplanet.org



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Global Forest Hotspots – Why Your Paper Matters!

AT CANOPY OUR MISSION IS TO PROTECT THE WORLD'S REMAINING ANCIENT AND ENDANGERED FORESTS. We work with companies in the book, newspaper, magazine and print industries to support the phasing out of paper made from ancient and endangered forests and the shift to more sustainable paper options.

Canada's Boreal and the Broadback Forest.

The vast Boreal Forest that stretches across Canada's north provides vital, life giving services to our planet. Home to seven of the world's largest remaining intact forests, the boreal is part of the largest terrestrial carbon sink on earth, absorbing tonnes of greenhouse gases and helping to mitigate climate change. It holds earth's largest reservoir of unfrozen fresh water, the breeding ground for close to three billion migratory songbirds and provides critical habitat to threatened caribou. The boreal supports large populations of bears, wolves, lynx, a wide diversity of native fish and countless communities who depend on healthy forests for their livelihood. Logging and development in this vital ecosystem is taking place without protected area and endangered species planning in place to safeguard a sustainable future.

Immediate Opportunity for a Boreal Conservation Solution

Set in the traditional territory of Cree First Nations, the Broadback Forest is an ecologically rich, intact forest landscape sheltering a wide diversity of species including threatened Woodland Caribou. A call for protection of over three million acres of forest has recently been issued by three directly affected Cree communities and the Grand Council of the Crees. Canopy and other environmental groups, along with a broad spectrum of interests including scientists and forest product customers are also supportive and in response logging companies have agreed not to log in the area. All that remains is for the Quebec government to adopt the Cree Nations' proposal and designate a 13,000 km² protected area in the Broadback Forest. In doing so, the government would meet its own Ministry of Environment's recommendations to address the province's protected-areas shortfall and create large tracts of protection sufficient in size to support ecosystem health and the recovery of threatened species.



Coastal Temperate Rainforests

Temperate rainforests are globally rare, having only ever covered less than one % of the earth's surface. Lush, abundant forests that once stretched from California to Alaska, they are home to thousand-year-old cedars and towering spruce. While much has been accomplished to conserve British Columbia's Great Bear Rainforest along with ongoing efforts to protect the few remaining ancient forests on Vancouver Island, their future is not yet secure.

In the Great Bear Rainforest a collaborative conservation agreement that allows environmental values and economic needs to work hand in hand is in place. Full implementation of the commitments made by government, the forest industry, First Nations and environmentalists is still required. Reaching agreement in the Great Bear took years of dedicated work and in the end, all parties committed to 70% protection of natural old growth levels. The 50% mark has been reached, but the forest industry and Government need to act on their promise to attain a 70% threshold. The support and engagement of forest product customers to ensure full implementation of the Great Bear Agreement continues to be of vital importance and with your direct engagement can become a remarkable story of success.

Canopy is also engaging customers in seeking solutions for the remaining pockets of intact rainforest on Vancouver Island. With less than 25% of productive ancient forests remaining on the island, we have little time to act for both the environment and the economy. The forest industry is in a position where they have to begin reinvesting for a different model of forestry – what they are used to cutting simply does not remain in significant volumes for the future. Canopy is hopeful that the paper choices you make can mark the line between survival and extinction of both ecosystems and sustainable forestry in this region.

Indonesian Rainforests

Sumatran tigers, orangutans, elephants, spectacular birds, rhinos and a host of other species all inhabit the lush tropical rainforests of Indonesia. Indonesia is subject to some of the highest rates of deforestation in the world. 40% of its forests have been lost in the last 50 years and 85% of the country's greenhouse gas emissions result from deforestation. About 30% of Indonesia's rainforest loss is linked to pulpwood plantations and rainforests cleared for palm oil plantations also end up in paper products.

Only 400 to 500 Sumatran tigers remain on earth. Your paper choices will help determine their future.

What you and your printers can do for the world's Ancient and Endangered Forests:

Engage: Work with Canopy to identify how you and your printer can collaborate with decision-makers and producers to support lasting solutions for these Global Forest Hotspots.

Reduce the Problem:

Ask your suppliers to make sure they are working to eliminate fiber sourced from endangered forests.

Buy Green: Prioritize the use of ecopapers including those made with 100% recycled content and straw papers. See Canopy's ecopaper database for hundreds of options www.canopyplanet.org/EPD

The Value of the Green Print Leadership Report

- **Build Partnerships That Reward the Trailblazers**

Canopy has advised book and magazine publishers, printers and newspapers from around the world on developing forest conservation and paper procurement policies. Printers that establish a leading policy to advance more environmentally appropriate options are recognized throughout Canopy's network.

- **Increase Visibility**

Canopy promotes all our partners and publications through our website, social media and earned media channels. Coverage of Canopy initiatives has appeared in the ***New York Times*, *Economist*, *Guardian*, *Huffington Post*, *RISI*, *Sustainable Brands News* and *PrintAction*.**

- **Improve Street-Cred**

Cut through the "green wash" and customer confusion with comprehensive and independent third party recognition by an award-winning and respected forest conservation organization.

- **Track Progress**

Canopy provides confidential report cards to printers to identify the strengths and weaknesses of environmental performance and to navigate the path forward.

- **Maximize Your Printer's Green Standing**

We can work with your printer to develop and implement forest conservation and paper procurement policies that will maximize and measure results.

- **Access Cutting Edge Eco Paper & Forest Conservation Intelligence**

Information is power and in our fast changing world being ahead of the game pays. Let Canopy help you and your printers navigate the way through the issues and risks throughout the supply chain.

// As a major print customer with a robust paper purchasing policy, Sprint is committed to working with printers that meet our goals. The forest conservation work Canopy advocates for is well aligned with our vision. //

— KATHLEEN BAKER, *Chairperson of the Paper Leadership Council, Sprint*



PROFILES IN LEADERSHIP: COLLABO

TC Transcontinental – A Defining Partnership



The story of Canopy's relationship with TC Transcontinental is a classic tale of a corporate-NGO partnership. When we first approached TC Transcontinental in 2003, things were tentative. But once we began to explore opportunities for collaboration, the company quickly saw the benefits of working with an innovative and credible environmental non-government organization (NGO). So began our unique partnership.

TC Transcontinental, the fourth largest printer in North America, released their first ecopaper purchasing policy in October 2007. The policy includes a paper hierarchy, which states a top-level preference for domestically produced 100% recycled papers. TC Transcontinental's policy applies to all their business divisions, including 30 business and consumer magazines, more than 190 newspapers, Quebec's largest educational publisher, 7,700 book titles and 28 North American print plants. This policy has prompted a number of their print clients to switch to ecopaper.

When TC Transcontinental won the "WhatTheyThink Environmental Innovation Award" for Environmental Thought Leader in 2012, judges drew specific attention to the company's work to implement the paper purchasing policy developed with Canopy, including the surpassing of ecopaper purchasing targets put in place to ensure policy implementation. In recognition of the company's commitments to actively supporting conservation solutions in places like the Boreal and Great Bear Rainforest, as well as their continual improvement, Canopy has awarded them our Ancient Forest Friendly™ Award in 2011 and 2012.

EarthColor – Partnering for Benefit of the Forests and Fields



EarthColor and Canopy have been collaborating since 2009 when Canopy helped the company create an Ancient Forest Stewardship Policy, which supports the protection of ancient and endangered forests globally. Together we have been providing third-party knowledge and expertise to printers and other corporations developing comprehensive forest resource policies.

EarthColor has also been proactively supporting Canopy's efforts to promote papers made of agricultural residues and is currently printing trial runs on paper made from wheat straw. The results so far are promising. This is exciting news because straw papers relieve pressure on our forests and also offer new income streams for farmers.

In 2012, EarthColor's partnership with Canopy won them the "WhatTheyThink Environmental Innovation Award" for Environmental Sustainability and Your Community. The judges specifically commended our partnership for actively promoting and assisting in responsible resource procurement in the paper and print industry, as well as EarthColor's educational outreach efforts on the sustainability of print and paper.

// Working with Canopy has been a vital part of developing our program and insuring that we have a balanced perspective when considering Financial, Environmental and Social Issues. The support of Canopy has been invaluable in broadening our perspective and advancement. //

— DAVID PODMAYERSKY, Sustainability Director with EarthColor

RATION IS KEY

Hemlock Printers—More Green Options Means More Business



There's no doubt about it, when it comes to green innovation Hemlock Printers is on a roll. In January 2004, Hemlock Printers became the first printing company in the Pacific Northwest to receive Forest Stewardship Council (FSC) Chain-of-Custody certification. A year later the Vancouver printer became the first in North America to develop and adopt an overarching Ancient Forest Friendly™ policy with Canopy.

Since then, Hemlock has implemented an impressive list of cutting-edge eco-minded initiatives. The company developed an ecopaper list for its sales team and 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.

Hemlock's green practices have opened up new markets, garnered industry recognition and awards and caused a noticeable improvement in business growth. Between 2004 and 2012, Hemlock saw the demand for green papers increase by more than 70%. Today 80% of the papers the company purchases are FSC certified and 30% of the total fiber purchased on an annual basis is made up of post-consumer waste.

In 2008, Hemlock also began offering carbon neutral credits through its *Zero Program*. Every stage in the lifecycle of paper emits carbon dioxide (CO₂) from the impacts of logging in the forest, to pulping at the mill, to transportation and disposal/recycling. Hemlock's *Zero Program* allows clients to reduce the impact of their paper choices. After the benefits of using recycled content paper and minimizing transportation distances are applied, Hemlock's *Zero Program* mitigates the remaining footprint with offset purchases. More than 252 Hemlock customers have benefitted from the program already.

Canopy has helped to guide Hemlock's purchasing programs for the past nine years, and today our collaboration continues as Hemlock helps drive demand for alternative fiber sources, post-consumer fiber and responsible management of ancient and endangered forests around the world.

Sandy Alexander – Forging Ahead with New Partnerships



Sandy Alexander's long environmental track record and Canopy's ecopaper focus form an ideal partnership that has culminated in a new "high bar" ecopaper procurement policy. Sandy Alexander encourages its customers to use 100% Post-Consumer Waste (PCW) when available and has set a goal for all paper used to have an average of 50% PCW within five years (subject to availability). In addition the company will preference FSC certification. Through the combination of these eco-criteria and education and engagement of their clients they have set a target of 75% of volume meeting this bar within five years.

The company is an early adopter in protecting the environment, being one of the first printing facilities to become FSC Chain of-Custody certified and adopting a seven year commitment to purchase 100% wind energy, making them the largest purchaser of renewable energy in the printing industry at that time.

In 2012, Sandy Alexander received the "WhatTheyThink Environmental Innovation Award" for designing its retail visual merchandising facility in the most environmentally friendly way possible. The company has also taken a leadership role in educating their customers on how to gauge green claims with their "Greenwashing Primer and Environmental Glossary".

Canopy is pleased to be working with companies like Sandy Alexander who share our commitment to sound business decisions that positively impact the environment.

Top Five Leadership Qualities

The top five leadership qualities among these printers:

- Strong paper procurement policy language in place with a focus on ancient and endangered forest conservation
- Active engagement to forward solutions in forest conservation hot spots
- Set targets and timelines for increased recycled and ecopaper use
- Support for paper made from leftover straw after the harvest
- Detailed transparent reporting

North America's 2012 Green Print Leaders

We understand the paper and print services you use say as much about your brand as the messages you send on them. We also know that choosing the right printer can help you meet your own sustainability targets. That's why we created North America's Green Print Leadership Report.

The printers included here completed Canopy's free Green Print Leadership Survey. They reported voluntarily on their paper use, ecopaper options, forest conservation initiatives, and other sustainability efforts.

**LEADING THE
LARGEST SHIFTS**
(100,000 + short tons)



TC Transcontinental is the leader in this category with a strong policy in place, transparent reporting and active engagement to support conservation solutions. See their profile on the previous page for more information.

**RR Donnelley
Quad/Graphics
Fry Communications**

The above printers have also made the investment to complete the Green Print Leadership Survey in 2012/2013. Canopy commends them for showing their customers that they are working on sustainability initiatives and we look forward to working with them on finalizing robust policies and other actions to protect our global forests over the coming year.

**MAKING WAVES WITH
SIGNIFICANT VOLUMES**
(25,000 + short tons)



EarthColor is the leader in this category with a strong policy in place, innovative exploration of straw paper and transparent reporting. See their profile on the previous page for more information.

Japs-Olson Company has recently put a policy in place. We look forward to working with them to lead the green pack over the coming year.

Lane Press, Quebecor Media Network, SG360 and Standard Register have also completed the Green Print Leadership Survey in 2012/2013 showing they are invested in sustainability. We hope to report next year that they all have policies in place.

**WITH SUSTAINABILITY
AT THEIR CORE**
(2,500 + short tons)



Sandy Alexander and Hemlock are strong partners on sustainability with robust track records. See their profiles on the previous page for more information.

Completing the survey in this category are also Friesens Corporation, The Lowe-Martin Group, Mitchell Press and Ripon Printers. Canopy commends them for showing their customers that they are working on sustainability initiatives.

CELEBRATING NEW POLICY LEADERSHIP

Since we launched the Green Print Leadership Survey in 2012, the following printers have finalized leading policies in collaboration with Canopy:



**THINKING
GLOBAL
AND ACTING
LOCAL**
(under 2,500
short tons)



All of these printers have robust policies in place and are implementing them with dedication and leadership.

photo: © Andrew S. Wright

PRINTERS WITH ROBUST ECOPAPER PROCUREMENT POLICIES

The following is a list of printers that have a leading forest conservation and ecopaper procurement policy in place with Canopy:

1984 Printing	Harmony Printing Ltd.	Royal Printers
A. Maciel Printing	Hemlock Printers	Sandy Alexander Inc.
Angel Printing	Inkworks Press	Skytone Printing & Graphics Ltd.
Bacchus Press	International Web Express	Spirit Printing Services, Inc.
Bay Area Green Printing	Japs-Olson Company	St. Joseph Print
Dollco – The Lowe Martin Group	Label Impressions	TC Transcontinental
EarthColor	Marquis Book Printing	TOOF Commercial Printing
Ecoprint	Mercer Color Corporation	Torstar/Metroland Media
Fuse Graphics Atlanta	MLI Integrated Graphic Solutions	Webcom Inc.
Gauvin Press	MPH Graphics Incorporated	
Greenerprinter	O.J. Graphix Inc.	
Green Printer Online	Plan It Green Printing	
Green Solutions Printing Inc.	Premier Press	

PRINTERS WHO CARE

The following printers also completed the 2012/2013 Green Print Leadership Survey – an investment of time that demonstrates their interest in, and commitment to, sustainability. This list is sorted by placement in the 2012 Printing Impressions Top 400 list (PI List).

RR Donnelley (1)	EarthColor	Ashford Design	MPH Graphics Incorporated
Quad/Graphics, Inc. (2)	SG360	Blanchette Press Ltd.	Plan It Green Printing
TC Transcontinental (4)	Japs-Olson Company	Category 5 Imaging	Premier Press
Standard Register (10)	Serigraph	Daily Digital Imaging	Quebecor Media Network
<i>(From the Top Ten Printing Impressions List)</i>	Sandy Alexander	Ecoprint	Schmidt Printing
	The Lowe-Martin Group	Fry Communications	Taylor Label
	Friesens Corporation	Green Printer	Three Z Printing
	The Lane Press	Green Solutions Printing	Williams & Heintz Map Corporation
	Ripon Printers	Harmony Printing	
	Hemlock Printers	Inkworks Press	
	Boyd Brothers, Inc.	Mercer Color Corporation	
	MET Fine Printers	Mitchell Press	

About Canopy

Canopy is a not-for-profit environmental organization dedicated to protecting forests, species and climate. Canopy collaborates with more than 700 companies to help ensure their supply chains are sustainable and believes that businesses can be powerful partners in implementing

innovative solutions. Canopy's partners include **Sprint**, **TC Transcontinental**, **Random House**, **The Globe and Mail**, **Scholastic** and **Lonely Planet**. Canopy's work relies on the support of individual donors who share our passion for the planet.

About the Survey

At Canopy we are passionate about protecting our forests, species and climate. We collectively have over 50 years of experience in the area of ecopaper procurement, forest conservation and building lasting collaborative relationships with corporations, including those that use paper. With printers, paper procurement offers a key to forwarding environmental leadership^{1,2}.

The survey was developed to ensure that printers are credited for their full range of environmental activities including the following:

- Paper procurement policies and engagement on forest conservation initiatives (44% of points allocated);
- Sustainability Reporting (20% of points allocated);
- Credible third-party certifications including those given by *Sustainable Green Print Partnership* (SGP) and *Eco logo* (14% of points allocated);
- Other environmental projects and innovations (21% of points allocated).

Finding the Leaders

All questions in the survey are allocated points. The point system is weighted to reflect the environmental impact of a

printer. Canopy is not publishing a ranked list, but instead a report on print leaders for each of the four print categories by volumes in short tons (a short ton = 2,000 pounds or ~907kg). North America's 2013 Green Print Leadership Report simply represents those that score the highest in the survey.

Since some printers do not use paper at all, these printers will have points prorated based on the questions that are relevant to their business activities.

We are unable to assess or promote printers that do not respond to the survey.

Participation: Who We Invited and How

Canopy staff have directly contacted and invited the top 50 North American printers based on sales as documented by *Printing Impressions* 2011 and 2012.³ In addition to directly contacting these top 50 printers, invitations to participate went out through printer trade media to all North American printers.

Follow Up and Feedback: Continuous Improvement

We will endeavor to work with participating printers to assist them in developing policies and reporting back to give them information on where they rank in their sector and how they can improve that confidential ranking.

Confidentiality

All survey information will be considered propriety and treated as confidential. Actual point scores are not published.

Promoting the Leaders

To reward the efforts of printers that have demonstrated a commitment to forest conservation, sustainability planning and reporting and other leading environmental practices, Canopy will be promoting, publicizing and profiling North America's 2013 Green Print Leadership Report. Our 700 corporate partners will be watching to see who in the Report can best meet their needs. In addition, the results will be profiled on our website, released in trade media publications, distributed to conventional media outlets, promoted through twitter and social media and recognized in a range of trade and green business events.

1 Leading carbon footprint studies (*Time* and *In Style* 2001, *us Book Industry* 2007 and *Backpacker* 2008) show that paper production is 48-88% of the carbon footprint of a printed product, while printing is 4-8% of the total.

2 The *EPA Toxics Release Inventory* 2010 cites paper manufacturing as the fifth largest toxics producer in the USA. Page 28.

3 *Printing Impressions*, Dec. 2011 and 2012, *The 2011 Top 400* www.piworld.com



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