

PPA Annual Sustainability Report 2021

ABOUT THE PPA

The PPA is the industry network for the UK's professional publishers. We represent and support over 200 companies, ranging from consumer magazine publishers to business-to-business data and information providers, customer magazine publishers and smaller independents. Whether on the page, through a screen, or face-to-face, our members create professional, influential content that resonates with target audiences and drives real action.

1. Introduction

This report outlines progress on sustainability from 2020 to 2021. Like the previous report, this document provides insight on PPA members' environmental work in the absence of a renewed voluntary Responsibility Deal with Defra, which ended in 2019.

Owing to the COVID-19 pandemic and Brexit Transition Period, we have delayed engaging with Defra to agree on a new arrangement. We intend to negotiate a new deal in due course, committing the industry to undertake a raft of initiatives designed to mitigate the environmental impacts of individual publishers and the industry as a whole.

The PPA and its membership remain committed to making progress with sustainability commitments and intend to arrange a new deal with Defra to extend the existing relationship for a further five years. Since the original agreement came into place with Defra in 2005 the industry has clearly demonstrated a proactive approach to ensure that it identifies and mitigates its environmental impacts. This leadership approach has been recognised by Defra. The industry has demonstrated over this period that as the sustainability agenda evolves, new and emerging challenges have been addressed.

In the meantime, this report provides insight on the industry's progress on PPA's wider sustainability initiatives, focusing on activities to: reduce carbon emissions; reduce unsold magazines; limit the amount of plastic wrapping and covermounted gifts that go to landfill; improve the recyclability of magazines; and encourage ethical and sustainable procurement practices.

2. Proposal to Create a New Agreement

The last Responsibility Deal ended in 2019, and the PPA would like to propose to Defra a new deal to extend the existing relationship for a further five years. Since the original agreement came into place with Defra in 2005 the industry has clearly demonstrated a proactive approach to ensure that it identifies and mitigates its environmental impacts. This leadership approach has been recognised by Defra. The industry has demonstrated over this period that as the sustainability agenda evolves, new and emerging challenges have been addressed.

The PPA recommends that it modifies the existing approach, to make the deal more flexible and capable of adapting to the changing environment and sustainability implications of the publishing industry. Such a deal will enable the PPA to invest its limited resources in further initiatives aimed at mitigating the environmental impact of publishers' activities. PPA would welcome the opportunity to meet with Defra to discuss our proposal for a new deal.

3. Materials Used to Produce and Distribute Magazines

The PPA continues to raise awareness of environmental issues and encourages publishers of printed magazines and digital media to produce and distribute such publications in a manner which minimises waste and carbon emissions.

3.1 Materials Used to Produce Printed Magazines

The PPA continues to encourage its members to use material from sustainable sources in their publications and recycled material should be considered where it is fit for the purpose.

To achieve this, the PPA:

- Recommends to its membership that FSC (Forest Stewardship Council) and PEFC (Programme for the Endorsement of Forest Certification) certified paper is used in publications,
- Provides guidance on ethical procurement and environmental best practice and promote this to its membership.
- The PPA has also undertaken an annual survey on sustainable sourcing of paper and the details are noted below.

A recent survey was undertaken of our largest publishers to identify the amount of paper used and types of paper used annually. The sample of publishers surveyed represents some 70% of the membership by revenue. The results are noted in the table below.

| Paper Purchased Annually 2020 | Tonnage | % of total |
|--|----------------|-------------------|
| Approximate tonnage of PEFC certified paper purchased annually | 79,548 | 72% |
| Approximate tonnage of FSC certified paper purchased annually | 37,520 | 34% |
| Approximate tonnage purchased annually from outside the EU | 3845 | 3.5% |
| Approximate tonnage of recycled content purchased annually | 4,100 | 4% |
| Approximate tonnage of paper purchased annually not certified | 3,000 | 3% |

In summary, the findings from our survey indicate that 97% of paper is purchased from sources certified as sustainable, with 72% being PEFC certified and 34% being FSC certified. Quantities of paper purchased outside the EU remain low. Quantities of recycled content paper used also remain low, reflecting the requirement for high quality print finishes amongst magazine publishers.

3.2 Plastic and Alternative Materials Used to Wrap Magazine Copies

The PPA continues to explore ways to reduce the environmental impacts of plastic magazine wrapping and continues to investigate new opportunities in order to mitigate environmental impacts with relevant parties.

To this end, during 2019 PPA commissioned and published an extensive and independent evaluation of alternatives to standard single-use polywrap. This research paper provides publishers with economic and sustainability information regarding alternative materials, ensuring that they can make informed decisions regarding adoption of alternative materials.

This action coincided with a rapid adoption of alternative solutions by UK publishers, as evidenced in our annual polywrapping survey which was extended to include emerging materials (paper wrapping, starch-based compostable wrap, and bio-based sugarcane PE) as well as standard polyethylene and polypropylene wrap. The results of the survey are presented in the table below:

| Material Used | Weight (Kg) in 2020 | Weight (Kg) in 2019 |
|---|----------------------------|----------------------------|
| Approximate amount of Polyethylene (LDPE) used annually | 256,079 | 319,293 |
| Approximate amount of Polypropylene (PP) used annually | 0 | 47,000 |
| Sub-total LDPE and PP | 256,079 | 366,293 |
| Approximate amount of paper wrap used annually | 532,022 | 413,732 |
| Approximate amount of starch-based wrap used annually | 73,734 | 80,787 |
| Approximate amount of sugar-cane wrap used annually | 0 | 12,423 |
| Sub-total alternative materials | 605,756 | 506,942 |

The following trends can be seen in the data:

- Encouragingly, the survey indicates a significant reduction in the use of plastic used annually, with no PP used by surveyed members as this material is currently deemed non-recyclable according to the OPRL (On-Pack Recycling Label) scheme.
- There has been a 20% annual decrease in the amount of LDPE used.
- The 30% overall fall in total fossil-based plastics use has been offset by a shift to non-fossil based alternatives.
- There has been a 29% annual rise in the amount of paper wrap used. More material is used in a paper wrap due to it having a greater weight, but paper wrap is renewable and aligns with UK publishers' sustainability ambitions.
- Overall, the uptake of alternative materials has increased as publishers work to eliminate unnecessary single-use plastics.

4. Carbon Emissions Reduction

The PPA continues to investigate the environmental impacts of the magazine publishing supply chain. In recent years, a major focus of this work has been carbon footprinting, culminating in the development of an award-winning and pioneering Carbon Footprint Calculator. The Carbon Calculator is a user-friendly online tool – access is available from here: <https://www.ppa.co.uk/resource/the-ppa-carbon-calculator>

The PPA Carbon Calculator is a tool which allows UK magazine publishers to estimate the carbon footprint of various activities, specifically:

- A publisher's office buildings
- The fieldwork associated with publishing (e.g. business meetings, journalist travel, etc)
- The manufacture, distribution, consumption and disposal of a printed publication (i.e. a physical magazine title)
- The provision and consumption of digital content (e.g. web pages, page turners, apps, etc).

Using the calculator provides publishers with an understanding of the size of the carbon impact of different activities within their business and therefore allows them to make informed decisions as to how these impacts can be reduced and managed.

As part of the survey, PPA members were asked to respond to questions related to whether they have a GHG inventory, and if they participate in carbon offsetting schemes. Results found:

- 44% have produced GHG inventories, with 33% covering Scope 3 emissions as well as Scope 1 and 2. A further 22% are in the process of producing GHG inventories.
- 56% have defined emissions targets or these are in preparation.
- 22% are involved in carbon offsetting schemes including Condé Nast's five-year sustainability strategy, and a further 33% of publishers are exploring offsetting options.

The carbon offsetting schemes adopted vary in extent. For some publishers, these cover emissions associated with the paper and print used for selected titles, for other publishers these include emissions associated with business premises as well as production.

5. Waste Prevention and Covermounts Return Schemes

PPA members recognise the need to maximise the circularity of materials used in their products and many have reduced the frequency of plastic covermounted items, opting for alternative gifts as a substitute. Investment and developments now mean that many publishers are participating in covermount returns schemes and new recycling models that facilitate increased collection and valorisation of magazine wrapping and/or covermount packaging and/or covermounts. Initiatives include the Recycle to Read project and TerraCycle.

Meanwhile, we continue to monitor the market for new developments. A simple move away from plastic does not necessarily enhance sustainability or reduce carbon impact of a magazine covermount, which is why all decisions need to be carefully researched and analysed to monitor the whole life cycle impact of all products.

To this end, PPA has published separate guidance in 2021, encouraging publishers to take a number of actions which will enhance the circularity of children's magazine wrapping, the packaging of covermounted gifts, and ultimately of the covermounts themselves. This guidance focuses on the sector delivering the following objectives:

- Action 1: Adopt recyclable materials for magazine wrapping and covermount packaging; adopt OPRL labelling; nominal targets are for 100% FSC/PEFC or recycled paper/card packaging from Autumn/Winter 2021 and 30% recycled plastic packaging target by 2025.
- Action 2: Limit the presence of non-recyclable components in plastic covermounts.
- Action 3: Collaborate through the PPA and industry forums to develop and evolve best practice, continually improving sustainability and exploiting technological advances to reduce waste.

PPA continues to explore this workstream with publishers across various working groups to enhance sustainability practices and encourage cross-industry collaboration.

6. Conclusion

This report provides insight on status of the publishing industry in relation to sustainability. The survey of members has shown that UK publishers are actively working to reduce their environmental impact and achieve sustainability. Highlights from the year include:

- 97% of paper used in magazine production is sourced from sustainable sources, certified to either FSC or PEFC.
- No surveyed members used any PP to wrap magazines in 2020.
- The overall 30% fall in fossil-based plastics use has been offset by a shift to non-fossil based alternatives, particularly renewable and recyclable paper wrap which fits with UK publishers' sustainability ambitions.
- Publishers are engaged in GHG reduction activities - 44% have produced GHG inventories, with a further 22% are in the process of creating an inventory. 56% have or are preparing emissions reduction targets and 22% are involved in carbon offsetting schemes, with a further 33% exploring offsetting options.

7. Governance

PPA Sustainability Action Group (SAG) is a committee devised to champion the sustainability credentials of the industry. The group has increased its membership and now includes the following members: Air Business, Archant, Bauer Media, British Medical Journal, Conde Nast, Clare Taylor Consulting, Denmaur, Dennis Publishing, DC Thomson, Frontline, Future Plc, Gary Marshall Consulting, Haymarket Media Group, Hearst Magazines UK, Hurst Media, Immediate Media, John Brown Media, London Review of Books, Marketforce, Menzies Distribution, New Scientist, News Media Association, Reach Plc, Royal Mail, Seven Publishing, Seymour Distribution, Signature Publishing, Smiths News, The Economist Group, Two Sides and YM Group.