



THE BLUELINE REPORT 2019

**A Consumer Guide to
Finding Sustainable
Printers**



canopy

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

The award-winning, annual Blueline Ranking showcases the best of North America’s forest-friendly printers. This industry assessment is written specifically for commercial consumers of printed materials – whether you’re a publisher, catalog manufacturer, a significant user of packaging, or company that relies on printed marketing materials as a core part of your distribution strategy.

We assess the performance of major printers annually against a robust set of key sustainability criteria. This analysis shows which North American printers’ practices are leading the way and outlines how your business can ensure that your printer is a suitable partner as you work to meet your sustainability goals.

The Blueline Ranking evaluates top printers, listed in the Printing Impressions Top 400, that collectively represent nearly 28 billion USD in sales and supports consumers of printed materials to 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 transparency and sustainability action by printers;
- Providing examples of printer sustainability leadership;
- Providing you with a dynamic online ranking of printers that will be updated regularly as new information is available.

The Blueline Ranking rates major printers on a set of 41 key sustainability criteria, for a total of 51 points, and highlights sector leaders for print customers. Those that top the ranking are outperforming their peers in areas such as supporting the advancement of conservation solutions in Ancient and Endangered Forest Landscapes of Hope, supporting the development of new environmental papers, such as those made with high recycled content or straw, and bringing a high degree of transparency to their sustainability initiatives.

Studies consistently show the largest carbon footprint of a major printed product – be it a book, magazine, newspaper or catalog – comes from the papers those pieces are printed on.¹ Since printing is usually outsourced, this means fulfilling your sustainability commitments often depends on the environmental performance of your printer and the papers you use. When you choose leading environmental paper options² and printers that have the knowledge and willingness to work with those papers, you’re reducing the risk of Ancient and Endangered Forest fiber and other controversial fiber sources making its way into your products and your supply chain. This, in turn, reduces your carbon footprint, enhances your company’s brand equity and helps support reputational risk management.

Unpacking Sustainability

Canopy expanded the printers assessed in its 2018 and 2019 Blueline Ranking to include leading printers of paper packaging in North America. With 3 billion trees disappearing into boxes, paper wrapping and linings every year, packaging has a massive footprint on the world’s Ancient and Endangered Forests. With booming e-commerce and a shift away from single-use plastics, this footprint is likely to increase over the coming years.

That is why Canopy has launched the Pack4Good initiative to help companies make sure that any wood-based packaging that you and your printer use is not coming from Ancient and Endangered Forests. By looking at reduction, re-design and the diversification of your fiber basket, Canopy can help you save money while also relieving pressure on the world’s forests.

For example, straw packaging will be a commercial reality in 2019, with the first modern straw pulp mill coming online and feeding into North American packaging and paper mills. For information on Pack4Good and how to get involved, please visit: <https://canopyplanet.org/campaigns/pack4good/>

The Importance of Transparency



Canopy's extensive work addressing procurement policies and engagement on Ancient and Endangered Forest conservation in the print sector during the past 15 years has revealed numerous ways in which the industry can help your business, as well as our forests and climate.

But one thing consistently stands out: we need more transparency in the reporting of sustainability efforts by the print industry.

Transparency is the bedrock on which sustainability assessments can be based. It is almost impossible to assess whether a printers' claims are good marketing, wishful thinking or actual performance without it. Printers may state a commitment to being "green," with references to the merits of various forest certification schemes and 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 slowly embracing this market reality.

In the Blueline Ranking, 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 paper procurement policies in place?
- Are printers reporting in detail on their use of pre- and post-consumer recycled paper?
- Do they state a preference for paper with Forest Stewardship Council (FSC) certification?
- Do they support the use of Forest Mapper – Canopy's Ancient and Endangered Forest map for sourcing decisions to ensure they minimize their (and your) risk?
- Are they supporting conservation solutions in the world's forests?

- Are they familiar with, and willing to use, alternative fiber papers such as those made with wheat straw?
- Are they able to provide information on what forest regions the pulp in their papers is sourced from?

Your brand's printing choices and active engagement of your printers will encourage greater transparency in the sector, advance conservation solutions and ultimately help you achieve your own sustainability goals. This, in turn, ensures a healthier outlook for the world's Ancient and Endangered Forests and climate. That's something to stop the presses for!

Introducing Ink Drops

In 2018, the Blueline Ranking developed new graphic tools to help give readers an easy snapshot of how printers measure up on sustainability. Instead of a numerical ranking alone, each printer is now also ranked with color-coded ink drops, which represent their leadership on sustainability efforts. The ink drops range from dark green, which indicates a high degree of performance on forest conservation, innovation and transparency, to red, which indicates very little if any transparent sustainability content on their websites.

Businesses can quickly scan the list to see which printers are seeing green.

2019 INK DROP LEGEND:



Dark Green
41-51 points

Awarded to printers that are leaders in forest conservation sustainability, including: a clear, leading environmental policy (see *What's in a Leading Environmental Paper Procurement Policy*; page 12); active engagement in efforts to advance forest conservation, strong transparency, and a proactive advancement of Next Generation solution papers.



Yellow Green
31-40 points

Awarded to printers that are strong performers in forest conservation, innovation and transparency and have a policy.



Yellow
21-30 points

Awarded to printers that have a forest conservation policy and sustainability website content. However, they are not as actively engaged in forest conservation as their higher-ranking peers.



Red Yellow
11-20 points

Assigned to printers that have a small amount of transparent sustainability content on their website, may have a forest conservation policy and where there is significant room for improvement.



Red
0-10 points

Assigned to printers that have very little, if any, transparent sustainability content on their website.



Moving up a Grade: Recommended Actions for Printers to Improve Their Blueline Ranking in 2021

It's simple. Anywhere a printer does not have a point in the Blueline Ranking is an opportunity for improvement.



Red (0-10) and Red Yellow (11-20) Ink Drops

The good news? Printers with these ink drops have a lot of room for improvement. If they do not already have a policy in place, they are encouraged to develop a leading paper policy (See *What's in a Leading Environmental Paper Procurement Policy*; page 12) and post it to their site, develop detailed and transparent sustainability content for their sites, and publish any existing corporate social responsibility reports. Canopy is happy to provide support for any of these actions. Many of the printers in these categories state that they are doing great things for the environment, but are not yet providing details or metrics that can be assessed. We hope to see fewer printers with these ink drops in the 2021 Blueline Ranking.



Yellow (21-30) Ink Drops

These printers have a history of sustainability transparency and are encouraged to work with Canopy to lift their sustainability performance to the next level and remain on par with their peers. Canopy

will develop tailored plans to support these printers to implement their policies, based on areas where they currently have performance gaps. As a start, these printers are invited to start assessing their supply chain with ForestMapper, and support supply chain shifts to conserve Ancient and Endangered Forests. They are also encouraged to support research and development of Next Generation Solutions such as wheat straw based papers.



Yellow Green (31-40) Ink Drops

These printers are strong performers in sustainability transparency and are encouraged to work with Canopy to lift their sustainability performance to the next level to remain on par with their peers. Canopy will develop tailored plans to support these printers to implement their policies, based on areas where they currently have performance gaps.



Dark Green (41+)

Even for those printers at the top, there will be room for improvement in 2021.

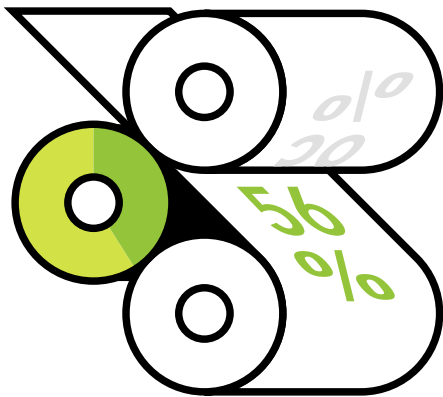
In 2021 new criteria will be added to the Blueline Ranking for the following sections:

- In the section "Leaders on Policy," printers will receive one point if their policy addresses packaging.
- In the section "Actions on Forest Conservation," printers will be given one point for every 20% of their papers verified as no risk of including Ancient and Endangered Forest fiber.
- Printers will now lose up to five points for failing to take any known actions to address the risk of Ancient and Endangered Forests, as mapped in ForestMapper, in their supply chain.
- In the section "Innovation and Next Generation Solutions," printers will receive one point for offering North American based agricultural residue paper to clients and another point for supporting the research and development of North American agricultural residue paper through machine tests.
- For the section "Leaders in Supply Chain Shifts," printers will receive one point for every 20% of total packaging volume that is 80-100% recycled or agricultural residue content across all North American operations.
- For the section "Leaders on Actions to Reduce the Footprint of the Company," printers will receive one point for an Energy Management Initiative, Renewable Energy Plan or Initiative, or GHG Reduction Strategies. This is a combination of what was three points in 2019.

What it Takes to be the Best



Canopy is happy to report that in 2019, 56% of ranked printers now have publicly available, pulp and paper procurement policies.



These policies support conservation of the world's Ancient and Endangered Forests and articulate the printer's commitment to support high recycled content papers, the commercial adoption of Next Generation solutions such as paper or packaging made of straw, and other key elements of sustainability outlined below. The printers leading the North American sector also publicly report on their sustainability efforts, and communicate the importance of these efforts to their customers.

In addition, this year more printers are taking action to support forest conservation solutions by sending proactive messages to governments responsible for land-use decisions. Additionally 35% of printers featured in this year's Blue Ranking are supporting the use of ForestMapper, Canopy's map of Ancient and Endangered Forests. These maps allow printers to accurately assess their supply chain for risk, as well as recognize conservation opportunities. Using ForestMapper is an important step for those printers who are serious about implementation of their sustainable procurement policies.

Further, all the companies with dark green Ink Drops have demonstrated leadership in the following areas:

- They have robust policies in place, with language to protect Ancient and Endangered Forests, that are posted to the company website;
- They support Canopy's ForestMapper tool, and have begun to use it to assess their supply chains;
- They engage with governments on the need for on-the-ground conservation in forest Landscapes of Hope;
- They support markets for papers with agricultural residues, including developing letters of interest to purchase;
- They give a preference to Forest Stewardship Council certified virgin wood fiber;
- They include transparent reporting about their sustainability on their websites.

In a competitive industry where slick marketing claims of being "environmentally friendly" abound, the credentials listed above form the basis for discerning which printers are credible environmental leaders.

Profiles of Printers Leading the Ranking with Dark Green Inkdrops



The Printing House (TPH) is proudly Canadian-owned and operated since 1961. With over 70 locations across Canada, TPH has been consistently moving up the ranking in recent years. In 2019, they top the ranking for the second time with the highest score in the Blueline Ranking history. They have achieved this with a robust Ancient Forest Friendly™ procurement policy posted to their website; an annual CSR report that exceeds GRI guidelines by reporting on FSC paper use; support of ForestMapper and their assessment of their supply chain with it; significant, detailed and transparent sustainability content on their website; engagement of governments in Canada and Indonesia to support conservation in Landscapes of Hope; engagement of paper suppliers to develop Ancient Forest Friendly™ papers; support of markets for papers made with agricultural residues; and last but not least, the undertaking of local initiatives, such as support for bee population health by placing eight bee hives on the roof of their Head Office in Toronto.




Hemlock Printers enters the top three this year, after five years in the top five. They were the first printing company in the Pacific Northwest to receive FSC Chain-of-Custody certification, and the first in North America to develop and adopt an overarching Ancient Forest Friendly™ policy with Canopy. Their commitment to caring for and safeguarding the world's forests, species and climate is further demonstrated through their support of ForestMapper, conservation planning in the Great Bear Rainforest and the Boreal with letters to the Provincial Premiers, assessment of their supply chain for risk of Ancient and Endangered forest fiber, and increase in the availability of post-consumer recycled papers offered (their clients purchase 50 times the amount of paper made from 100% recycled material than in 2010 because of the education they have done about sustainable paper options). They have also developed their own carbon-offset program called "Zero," along with an Ancient Forest Friendly™ house sheet, the sales of which result in carbon offsets by forwarding conservation areas in the Great Bear Rainforest with revenue going to First Nations.



Mitchell Press, based in the Pacific Northwest, are the largest commercial heat-set web printer in western Canada. In 2017, Mitchell didn't have a policy with Canopy, but over the past two years, the company has developed a robust procurement policy and overhauled the sustainability content on their website to transparently report on all they are doing for the environment. Mitchell Press has a preference for papers containing post-consumer waste recycled and FSC fibers, and papers with agricultural residues, while also supporting Canopy's ForestMapper and starting to assess their supply chain using the map as a tool.

2019 Blueline Ranking

| Company Name |  | Canopy Sustainability Rank 2019 | Canopy Sustainability Rank 2018 | PI Top 400 2018 [A] | Region | Type | Has Comprehensive Public Paper Procurement Policy or Platform [1] | Policy Total Points [B] |
|--|---|---------------------------------|---------------------------------|---------------------|----------|-----------|---|-------------------------|
| TPH The Printing House |  | 1 | 1 | 90 | CAN | COM | 1 | 9 |
| Hemlock Printers |  | 2 | 4 | 168 | CAN | COM | 1 | 9 |
| Mitchell Press |  | 3 | 3 | 202 | CAN | COM | 1 | 9 |
| TC Transcontinental Printing |  | 4 | 9 | 7 | CAN | COM, PKG | 1 | 7 |
| Digital Color Concepts |  | 5 | n/a | 157 | USA | COM | 1 | 9 |
| Metropolitan Fine Printers |  | 6 | 7 | 172 | CAN | COM | 1 | 9 |
| Taylor Communications |  | 7 | 2 | 5 | USA | COM | 1 | 9 |
| Marquis Book Printing |  | 8 | 14 | 66 | CAN | BOOK | 1 | 9 |
| Sandy Alexander |  | 9 | 21 | 41 | USA | COM | 1 | 8 |
| Friesens |  | 9 | 6 | 60 | CAN | BOOK | 1 | 9 |
| The Lowe-Martin Group |  | 11 | 5 | 79 | CAN | COM | 1 | 8 |
| IWCO Direct |  | 12 | 11 | 11 | USA | DM | 1 | 5 |
| Freedom Graphic Systems |  | 13 | 8 | 30 | USA | DM | 1 | 8 |
| ColorGraphics (a Cenveo Company) |  | 14 | 13 | n/a | USA | COM | 1 | 8 |
| Arandell Corp |  | 14 | 12 | 51 | USA | CAT | 1 | 8 |
| RR Donnelley |  | 16 | 18 | 1 | CAN, USA | COM | 1 | 5 |
| LSC Communications |  | 17 | 17 | 3 | USA | COM | 1 | 5 |
| St. Joseph Communications |  | 17 | 14 | 49 | CAN | COM | 1 | 3 |
| Vistaprint (a Cimpress business) |  | 19 | 20 | 4 | CAN, USA | SPEC | 0 | 1 |
| Unimac Graphics (div. of Command Companies) |  | 20 | n/a | 21 | USA | COM | 0 | 4 |
| Japs-Olson Company |  | 21 | 18 | 29 | USA | DM | 1 | 8 |
| Premier Press |  | 22 | 22 | 186 | USA | COM | NP | 1 |
| Quad |  | 23 | 28 | 2 | USA | COM | 0 | 0 |
| Deluxe Corp. |  | 23 | 26 | 6 | USA | SPEC | 0 | 1 |
| WS Packaging Group |  | 25 | 23 | 14 | USA | PGK | 0 | 1 |
| Trend Offset Printing |  | 26 | 25 | 19 | USA | PUB | 0 | 0 |
| Ennis Inc. |  | 27 | 27 | 16 | USA | SPEC | 0 | 1 |
| Sir Speedy Print Signs Marketing |  | 28 | 29 | 18 | USA | SPEC | 0 | 1 |
| Cenveo Inc. |  | 29 | 29 | 8 | USA | COM, SPEC | 0 | 0 |
| Elanders Americas |  | 30 | 31 | 76 | USA | BOOK | NP | 0 |
| AlphaGraphics |  | 31 | 36 | 20 | USA | COM | 0 | 0 |
| The IMAGINE Group |  | 32 | 37 | 12 | USA | SPEC | 0 | 0 |
| SG360 |  | 32 | 37 | 17 | USA | DM | 0 | 0 |
| Alliance Franchise Brands |  | 34 | 42 | 15 | USA | COM | 0 | 0 |

| CSR Total Points [C] | Forest Conservation Total Points [D] | Innovation Total Points [E] | Paper Supply Chain Shifts Total Points [F] | Other Footprint Reduction Total Points [G] | All Points |
|-------------------------|--|--------------------------------|--|---|---------------|
| 2 | 13.02 | 6 | 5 | 10.00 | 45.02 |
| 0 | 13 | 5 | 6 | 9.98 | 42.98 |
| 2 | 13.02 | 5 | 4 | 8.13 | 41.15 |
| 2 | 10 | 5 | 3 | 8.97 | 35.97 |
| 0 | 7 | 6 | 1 | 9.95 | 32.95 |
| 0 | 11 | 3 | 0 | 9.00 | 32.00 |
| 1 | 8 | 3 | 2 | 8.71 | 31.71 |
| 0 | 11 | 4 | 0 | 7.00 | 31.00 |
| 1 | 7 | 5 | 0 | 8.00 | 29.00 |
| 2 | 5 | 3 | 2 | 8.00 | 29.00 |
| 2 | 6 | 3 | 1 | 7.97 | 27.97 |
| 2 | 6.5 | 2 | 1 | 8.00 | 24.50 |
| 0 | 4 | 1 | 0 | 8.00 | 21.00 |
| 0 | 0 | 0 | 0 | 7.00 | 15.00 |
| 0 | 0 | 1 | 0 | 6.00 | 15.00 |
| 1 | 0 | 0 | 0 | 7.00 | 13.00 |
| 1 | 0 | 0 | 0 | 7.00 | 13.00 |
| 0 | 1 | 1 | 0 | 8.00 | 13.00 |
| 0 | 0 | 0 | 1 | 9.99 | 11.99 |
| 0 | 0 | 0 | 1 | 6.90 | 11.90 |
| 0 | 0 | 0 | 0 | 3.00 | 11.00 |
| 0 | 0 | 1 | 0 | 8.00 | 10.00 |
| 1 | 0 | 0 | 0 | 8.00 | 9.00 |
| 0 | 0 | 0 | 2 | 6.00 | 9.00 |
| 0 | 0 | 0 | 0 | 7.00 | 8.00 |
| 0 | 0 | 0 | 0 | 7.00 | 7.00 |
| 0 | 0 | 0 | 0 | 5.00 | 6.00 |
| 0 | 0 | 0 | 0 | 4.01 | 5.01 |
| 0 | 0 | 0 | 0 | 5.00 | 5.00 |
| 0 | 0 | 0 | 0 | 4.00 | 4.00 |
| 0 | 0 | 0 | 0 | 1.02 | 1.02 |
| 0 | 0 | 0 | 0 | 1.00 | 1.00 |
| 0 | 0 | 0 | 0 | 1.00 | 1.00 |
| 0 | 0 | 0 | 0 | 0.00 | 0.00 |

To view the full interactive
Blueline Ranking, visit:
<https://blueline.canopyplanet.org/>

All endnotes and criteria are here:
<https://blueline.canopyplanet.org/>

Have questions? Please visit the FAQ
at <https://canopyplanet.org/blueline-ranking-frequently-asked-questions/>



photo: © Paul Hilton

Emerging and Innovative Opportunities for Leadership

An exciting new technology that uses agricultural waste to produce pulp has arrived. Located in Washington state – near one of the densest wheat farming areas in the U.S. – Columbia Pulp has begun production of 140,000 + tons of pulp per year in 2019 using only straw from wheat farmers.

Not only will this pulp not have an impact on forests, but it will also avoid carbon emissions that would have come from the common practice of burning the straw residue in the fields. Purchasing the wheat straw, left after the harvest of the wheat grain, will provide additional income for farmers. As Columbia and other alternative fiber pulp mills come online, print users and printers can help bring these products to market with letters of intent, commitments to purchase, a willingness to test new papers made with the pulp and subsequently a commitment to use alternative fiber papers on an ongoing basis. This exciting new product, in development for over a decade, has the opportunity to revolutionize our single-use products, including paper and packaging.

Some leading printers are already sending market signals to encourage the uptake of these products in order to reduce pressure on forests. As gatekeepers on paper choices for thousands of businesses, printers need to integrate both recycled and alternative fibers into their inventoried papers.

After years of recycled paper mill closures in North America, China's recent restrictions on the import of recyclable waste is creating an imperative for innovation in North American recycling infrastructure. With this change comes the opportunity for North America to reinvigorate production of these low biodiversity and low carbon-footprint papers.

Until 2018, China was importing more than half of the paper recovered in America, but China's recent "National Sword" regulations have forced North American municipalities to address the widespread problem of contamination of recyclable materials. These problems include non-recyclables thrown into the blue bin and shortfalls within single-stream recycling systems. Landfilling recyclables is expensive and wasteful.

Yet there is a silver lining emerging from the disruption, such as the example of a U.S. subsidiary of a Chinese company that has bought a shuttered US paper mill and hired 130 people to operate it, with the recycled feedstock now available.⁴

The U.S. currently recycles just under 35% of the waste it produces, much less than many other countries.⁵ The economic and environmental benefits (both climate and forest conservation related) of using recycled waste are significant. And the emergence of new state and municipal regulations, as well as new recycled paper producers in North America, can lead to a renaissance in North American-made, recycled paper products.

Leading printers' and print users' participation in waste reduction is a key factor in securing climate friendly print materials and safeguarding biodiversity and climate stability. And by fueling demand for recycled products, printers and their customers contribute to closed loop, circular innovations that save municipalities money, cut waste and create jobs in recycling.

(right) Columbia Pulp mill construction site in Washington State, USA. Commenced production of straw pulp in 2019.



How Can Print Customers Support Printers to Become More Sustainable?

Maintaining and growing market share are key in any dynamic sector. For North America's printers, businesses that print materials on a regular or semi-regular basis are critical to their continued success – and as such have the ability to significantly influence printers' sustainability performance. Here are four easy actions you can take to help improve the eco-footprint of your printed materials and print partners.

1

Source leading eco-papers:

Insist that your printer chooses Ancient Forest Friendly™ papers from the Superior step of the Paper Steps as listed in the Ecopaper Database at <http://epd.canopyplanet.org/>. Where Ancient Forest Friendly™ papers are not available, source recycled, agricultural residue or FSC® certified fiber-based papers from legal, non-controversial sources.

2

Develop a policy:

Ask your printer to work with Canopy or another credible ENGO to develop a paper procurement policy that is transparent and details the company's commitments to avoid sourcing from Ancient and Endangered Forests.

3

Be clear about your sustainability goals:

Include language specifying your sustainability objectives in contracts with your print providers.

4

Reward the leaders and engage those who are slow to move:

Printing is a service-based industry, so support printers that are best aligned with your company's sustainability needs and business objectives and encourage those who aren't to do so.

Top of Class: What's in a Leading Environmental Paper Procurement Policy?



Sustainability is dynamic. The benchmark for meaningful environmental performance is continually shifting as more companies develop rigorous sustainability programs and raise the bar for their industries, seeking to differentiate themselves from their competitors. Below are the key components of a leading environmental paper procurement policy in 2019:

- Vision statement compatible with corporate mission
- Commitment to eliminate fiber from Ancient and Endangered Forests and other controversial sources⁶
- Support for solutions and forest conservation agreements
- Support for smart design that maximizes paper efficiencies
- Reduction of forest and climate impacts by maximizing recycled content and alternative fibers
- Encouragement of the development of Next Generation solutions that reduce environmental and social impacts, with a focus on agricultural fibers (particularly residues) and recycled content
- Support for responsible forest management through Forest Stewardship Council (FSC) procurement
- Reduction of pollution, including carbon
- Policy promotion and stakeholder engagement
- Transparent timelines, benchmarks and accountability



For more information on the details of these components, visit: <http://canopyplanet.org/resources/elements-of-a-leading-policy/>

Nineteen printers ranked in the 2019 Blueline have public paper procurement policies in place. And eight of these printers have leading paper procurement policies that meet all of Canopy's criteria.

ForestMapper: A New Supply Chain Tool to Help Printers Avoid Risk

In October 2018 Canopy released ForestMapper, the first interactive online tool that maps the global extent of Ancient and Endangered Forests. ForestMapper is a tool that assists companies transitioning to more sustainable fiber supply chains and helps identify areas of potential sourcing risk.

The Ancient and Endangered Forest layer of ForestMapper is a composite data layer of 25 ecological values, including intact forest landscapes, habitat of species at risk, carbon density, and rare and threatened forest types. These forest regions represent the world's high conservation value and high carbon value forests. Over 100 corporate brands, as well as leading scientists, support ForestMapper. All the data used has been peer-reviewed.

The tool is designed to help forest-products consumers identify forest regions where there is a risk of sourcing from Ancient and Endangered Forests. Canopy encourages all printers to map their supply chain against ForestMapper's Ancient and Endangered Forest layer. If there is overlap, the printer has, through ForestMapper, the tools to learn more about what ecological values may be at risk in its sourcing area.



To view ForestMapper, and review the full methodology, see: <https://canopyplanet.org/tools/forestmapper/>



LANDSCAPES OF HOPE

ForestMapper also shows the geographic boundaries of Canopy's Landscapes of Hope. These are forest regions with exceptional ecological value where there is local momentum for conservation. Canopy has chosen to focus on these areas because conservation solutions are within reach. Canopy's current Landscapes of Hope include:

The Broadback Forest, Quebec, Canada

Intact boreal forest, high carbon landscape, habitat for the threatened woodland caribou.

Vancouver Island, British Columbia, Canada

Rare coastal temperate rainforest and high carbon biomass forest.

The Leuser Ecosystem, Aceh, Indonesia

The last remaining landscape where rhinoceros, elephants, orangutans and tigers still co-exist.

All of these forests are also home to Indigenous and traditional communities that rely on them for the maintenance of their cultural traditions and livelihoods.

ForestMapper shows how multiple ecological values overlap in these exceptional forests, including above and below ground carbon and threatened species.

Canopy is actively working with our market partners, local governments, industry stakeholders and Indigenous and traditional communities to develop conservation solutions for these landscapes.

Current Forest Laws are not Enough to Protect the World's Forests



In the last decade there has been increased urgency about the need to protect the world's forests.

In 2018, we learned from the International Panel on Climate Change that we need far-reaching action on climate change by 2030 in order to keep global warming from exceeding 1.5 degrees Celsius (which climate scientists have deemed the upper limit of "safe" warming levels). And, according to UN Environment, "forest protection represents 30 percent of the climate change solution."⁷

We also learned from the World Wildlife Fund's Living Planet Report that in the last 40 years we've seen a 60 percent decline in wildlife populations, largely due to habitat loss. Scientists are calling for significant tracts of forests to be protected and conserved given how critical they are for a stable climate, healthy precipitation cycles and vibrant biodiversity on our planet. This call to action is reinforced by ForestMapper, which

clearly shows the need for significant tracts of forests to be protected – and restored – on every continent.

Canopy urges all consumers of wood – especially those using single-use products, as is the case with most paper and packaging – to take special care when purchasing products that come from virgin fiber inputs. Currently, the world's remaining Ancient and Endangered Forests are not being protected at sufficient levels to ensure that their ecological values persist. At current logging levels, we are losing a forest area the size of one soccer field per second. Global tree cover loss has doubled since 2003, and the loss of rainforests has doubled since 2008.⁸

Ancient and Endangered Forests span the globe and are present on all continents. Regardless of whether they are

in Indonesia, Brazil, the Democratic Republic of the Congo, Russia, Canada or the US, special care must be taken when sourcing from Ancient and Endangered Forests, as they contain the richest biodiversity and sequester high levels of carbon. Contact us for support on how to minimize risk with the papers and packaging you use and to ensure your purchasing helps support conservation of the world's forests.



For more information on Ancient and Endangered Forests, please see: <https://canopyplanet.org/wp-content/uploads/2018/11/CanopyQuickGuideAncientEndangeredForests.pdf>

Methodology

Printers assessed include the 20 largest printers by sales in Printing Impressions Top 400 (2018), that use paper substrates, in addition to printers that have a policy with Canopy and are listed in the Printing Impressions Top 400. Other printers ranked have requested to be ranked or have been requested by one of our brand partners.

The 2019 Blueline Ranking assesses a total of 41 sustainability criteria for a total of 51 points. Between the 2018 and 2019 rankings, 7 new criteria, representing 15 points have been added in 2019 to reflect industry best practices, including:

- Engaging supply chain based on [ForestMapper](#) (1 pt. for each 20% engaged), up to 5 points total
- Harmonizing purchased papers with ForestMapper (1 pt. for each 20% harmonized), up to 5 points total
- Publicly supporting creation of a science-based conservation planning process, and publicly advocating for the establishment of moratoria in priority ecosystems including but not limited to, rare ecosystem types and endangered species habitat, 1 point
- Asking Paper Mills to test North American sourced Alternative Fiber Pulp, 1 point
- Publicly Reporting on percentage use of Recycled paper, 1 point
- Publicly Reporting on 50 percent + use of Recycled paper, 1 point
- Publicly Reporting on percent use of FSC paper, 1 point

A binary system of credit was applied with 2 to 5 points given for each criterion. For example, if a printer has a sustainability section on the company website, that is a yes = 1 point.

See page 5 for details on the new criteria to be added for 2021.

The points are based on information that printers make publicly available on their websites or share directly with Canopy. Printers are awarded a colored Ink Drop based on the number of points they have accumulated, from dark green at the top to red at the bottom.

Each year we attempt to contact all printers being assessed prior to the ranking release, to give them all the opportunity to update web content in order to maximize their score in this assessment. All printers, for which we have contact details, received a draft copy of their assessment to review and provide feedback and/or additional information. In the case of some printers, contact names and emails are not available.

The Six Areas Assessed:

1. Procurement Policy
2. Corporate Social Responsibility
3. Forest Conservation
4. Innovation
5. Paper Supply Chain Shifts
6. Footprint Reduction



Please see the online ranking for a detailed account of possible points: <https://blueline.canopyplanet.org/>

Endnotes

- 1 National Geographic 2009, Time, InStyle, Backpacker and The U.S. Book Industry carbon footprint studies: 48 - 79% of the carbon footprint is attributed to paper production, while 4 - 17% is attributed to printing. Further, a 2012 life cycle study of office paper, catalog, telephone directory and magazine paper conducted by AF&PA concluded the largest portion of the carbon footprint came from the paper production stage (44 - 67%).
- 2 Please see the Green Step of the Paper Steps at <https://canopyplanet.org/resources/the-paper-steps/>
- 3 Environmental impact estimates were made using the Environmental Paper Network Paper Calculator Version 4.0. For more information visit www.papercalculator.org
- 4 <https://www.csmonitor.com/Environment/2019/0103/China-gets-tough-on-US-recyclables.-How-one-Maine-town-is-fighting-back>
- 5 <https://www.bethrecycles.com> with source data from the EPA 2015. <https://www.epa.gov/facts-and-figures-about-materials-waste-and-recycling/national-overview-facts-and-figures-materials>
- 6 Other controversial sources include timber harvested illegally, in violation of indigenous peoples rights, or that come from plantations established after 1994.
- 7 UN Environment Oct 2018, <https://twitter.com/UNFCCC/status/1040685323469021184>
- 8 <https://www.theguardian.com/environment/ng-interactive/2018/jun/27/one-football-pitch-of-forest-lost-every-second-in-2017-data-reveals>

“The Blueline Ranking is a fantastic resource for HH Global as we work to implement our sourcing policy and to ensure we, and our clients such as MetLife, Bayer and Google, do not have Ancient and Endangered Forests in any of our supply chains.”

– Kevin Dunckley, Chief Digital and Innovation Officer at HH Global



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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.