

# Newsprint Recovery & Recycling

2021-2022

Prepared by IndustryEdge Pty Ltd

September 2022



# Summary

**In 2021-22, the proportional national recovery rate for newsprint was 61.8%, a decline of 5.8% on 2020, as declines in Newsprint consumption and availability returned to trend and impacted recovery and recycling.**

Newsprint consumption by major publishers in Australia declined by 11.8% in 2021-22, compared with 2020 or by 7.8% on a normalised annual basis. Over the decade since 2011, Newsprint consumption in Australia has declined an average 13.2% per annum.

Perhaps the major consequence of declining consumption is that recovery of Newsprint is becoming ever more complex, fragmented and ultimately, less efficient and effective. Although global recycled fibre markets recovered some ground over 2021-22, they remain highly disrupted and uncertain.

For Australia, exports are the major end-use of recovered Newsprint as paper and paperboard producers no longer target this dwindling recovered resource as a feedstock.

Now under demonstrable pressure, the recovery rate reflects the challenges faced by the sector and by the recovery and recycling industry in general.

The key data is set out in the table below.

## Annual Recovery Statistics for Recovered Newsprint: 2019 – 2021-22 (tonnes & %)

	2019 (t)	2020 (t)	2021-22 (t)	% Change 2020 to 21-22
<b>Consumption</b>	200,649	172,015	151,744	-11.8%
<b>Input to paperboard</b>	22,015	18,810	17,950	-4.6%
<b>Input to newsprint</b>	18,514	-	-	
<b>Input to moulded fibre</b>	4,070	3,253	3,935	21.0%
<b>Input to pet care</b>	21,345	16,054	15,875	-1.1%
<b>Input to 'Other'</b>	2,875	2,235	980	-56.2%
<b>Exports</b>	67,961	72,530	55,087	-24.0%
<b>Total Recycled</b>	136,780	112,882	93,827	-16.9%
<b>Recycling Rate</b>	68.2%	65.6%	61.8%	-5.8%
<b>Unrecovered Newsprint</b>	63,869	59,133	57,917	-2.1%

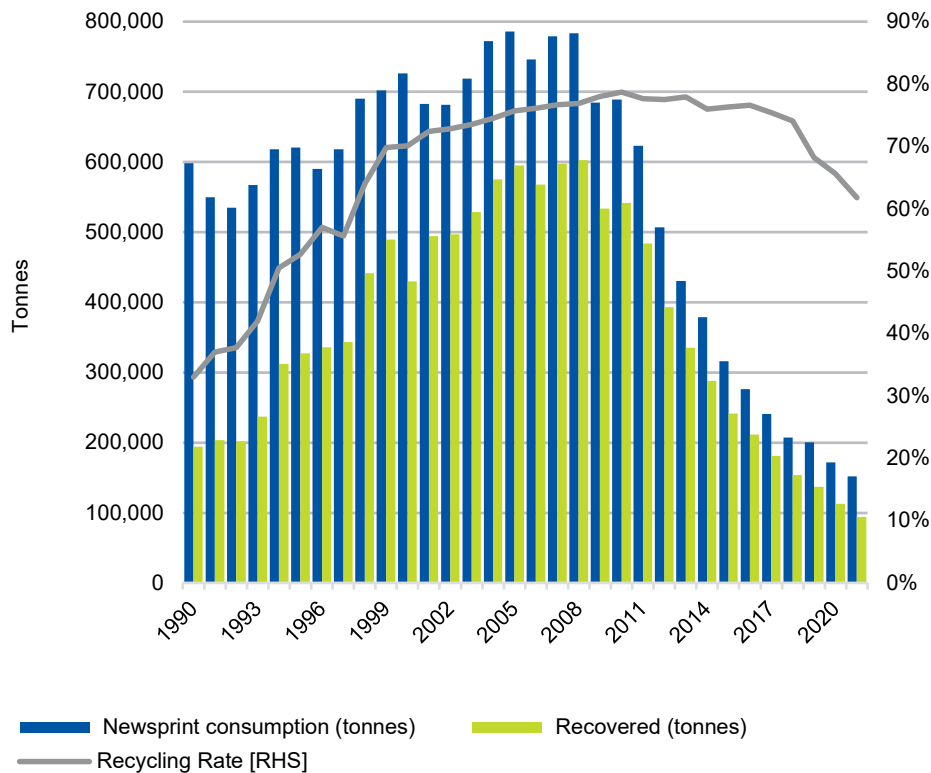
Source: IndustryEdge 2021-22

Note: The column titled '% Change' is the difference between the figures for 2020 and 2021-22 expressed as a proportion of the 2021-22 figures.

For more than a decade, rapidly and persistently declining consumption of Newsprint has defined the opportunities and crystallised the challenges in recovering and recycling used Newsprint.

<sup>1</sup> From 2021-22, the annual Newsprint Consumption, Recovery & Recycling report will operate on fiscal years, moving from calendar years

## Australian Newsprint Consumption, Recovery and Recovery Rate: 1990 – 2021-22 (tonnes & %)



Source: IndustryEdge

International export market challenges aside, there is no escaping the consequences of a much smaller volume of material being available for recovery, sorting and recycling purposes. The counter to that may be the prospect of investments in improved sorting and segregation linked to the impending export licencing requirements under the Recycling and Waste Reduction Act, 2020. There is some prospect of increased proportions of materials like Newsprint being specifically sorted from the 'Unsorted' volume as a result.

There is no longer any targeted demand for recovered Newsprint by Australian paper and paperboard producers. That fact reduces the economic incentives and security of demand that previously drove sorting and specific supply of recovered Newsprint into the domestic market. Stable 'non-traditional' markets have replaced some of this volume.

As consumption declines, Newsprint is ever-more difficult to discern, segregate or specifically measure, particularly in the 'Unsorted' export volume that is primarily derived from household kerbside collections.

# The Product Stewardship Journey

**Australia's newspaper and magazine publishers stated working together on Environment in 1990 and have now completed their sixth successive five-year product stewardship plan known as the 'National Environment Sustainability Agreement for newspapers and magazines (NESA)'.**

This annual report on the state of newspaper recycling is part of the commitment publishers have made to ensure accurate information is available to government, industry and the public so that reliable decisions can be made to advance recycling.

This year, Publishers are now going a step further and seeking voluntary accreditation under the Federal Product Stewardship Act.

This ongoing product stewardship commitment by the industry has previously been endorsed by all state and federal governments and it has enabled publishers to maintain their voluntary commitments of the industry NESA which helps to maintain a world class newspaper recycling rate and delivers wholly sustainable products.

- Nine
- News Corp Australia
- Seven West Media
- Are Media

## Under the NESA Publishers commit to:

1. Recycle pre-consumer production waste
2. Recycle newsagents' returns that can be secured by Publishers
3. Recycle publication paper end-of-reel residue, wrappers and cores
4. Reduce printed waste through reduction of overruns
5. Improve operating practices to reduce white waste
6. Use lower grammage newsprint where possible
7. Ensure Australian publishers maintain their ongoing support for procured newsprint containing recycled fibres and/or fibres sourced from sustainably managed forests
8. Provide free advertising space in member newspapers, magazines each year.  
This has a retail value of \$500,000 a year.
9. Collate, produce and publish accurate data to inform and advance recycling

In order to report and confirm these commitments an annual survey is completed by NESA members. This report summarises these responses to this questionnaire in the Appendix. It is anticipated that this information will provide government with valuable confirmation of the industry's environmental activities as required under the Product Stewardship Act voluntary accreditation process.

# Summary of Key Points

Consumption of Newsprint has declined by an average 9.9% per annum since 2018, or a total of 26.8% over the same period. This is a global experience, but one that has had its ups and downs, including over the last year.

After years of capacity closures in line with softening demand, a resurgence in demand for Newsprint in Western Europe and supply chain challenges resulted in shortages of supply that in turn saw dramatic price increases for Newsprint.

These events will continue to occur in a finely balanced market, where smaller volumes make the total market more sensitive to even relatively small or short-lived changes in demand and supply dynamics.

While somewhat insulated from the global market by distance and domestic supply, Australia is increasingly exposed to the prevailing global conditions.

Global conditions visited the Australian market, but there was seemingly no uplift in local demand. The brutal impact of the pandemic saw publisher's demand for Newsprint decline 14.3% in 2020. Since then, annualised consumption has fallen a further 11.8%, noting this is over a period of eighteen months. At the end of 2019, Newsprint consumption in Australia was marginally more than 200,000 tonnes. Just two-and-a-half years later, annual consumption had slipped to less than 152,000 tonnes. There will be no recovery.

**Since the beginning of 2020, the global pandemic has changed many aspects of modern life, some have been temporary, but others are more likely to be permanent. The following significant market events and factors influenced Newsprint consumption, recovery and recycling in 2021-22:**

- **Continued decline in Newsprint consumption**, with publisher's reporting total consumption declining to 151,744 tonnes <sup>2</sup> or 11.8% lower than in 2020. After the sector's consolidation in 2020 and the reduction in mastheads and printed news publishing, a more settled 2021-22 still resulted in declining consumption as publishers de-paginated.
- **No targeted domestic use of recovered Newsprint for recycling into paper and paperboard.** Since 2020, there has been no recycling back to Newsprint or to other grades of paper and paperboard. Any use in the manufacture of paperboard is now entirely incidental, associated with the intake of Unsorted recovered paper, which contains a proportion of Newsprint.
- **Changing pattern of export partner countries for Australian recovered paper, including Newsprint.** The exit of China from the global market of which it was the main player is now complete. Indonesia, Malaysia, Vietnam and Thailand are now the major recipients of Australia's recovered Newsprint.
- Use of recovered Newsprint in end-uses like **moulded fibre, pet care, composting and insulation** are the major combined off-take for recovered Newsprint in Australia.
- Despite the decline in total available materials, these sectors are consuming a consistent volume of recovered Newsprint, and therefore, a growing proportion of the total. In 2021-22, that proportion rose to a record 22.2%.
- **Sorting of recovered paper targeting Newsprint has almost ceased.** Other than from printers, publishers, newsagents and others in the Commercial & Industrial stream, Newsprint is almost entirely recovered in the 'Unsorted' or 'Other' category of recovered paper, most of which is derived from comingled kerbside collections.  
The only domestic paper manufacturing application for the comingled kerbside collection material is in the Paperboard sector, where recovered Newsprint is not targeted but does find its way into the production processes. The commercial driver for industrial-scale sorting has evaporated.  
Sorting in social enterprises is still relevant but is reportedly delivering only a small and decreasing volume of recovered Newsprint.
- **Exports of recovered Newsprint**, as available volumes reduce and exports of 'Mixed' or 'Other' unsorted recovered paper rise to dominance.

<sup>2</sup> Newsprint consumption is reported only for members of ThinkNewsBrands, with the additional users of newsprint considered to be consuming only relatively small volumes

# Market trends and challenges

Trends and features of a Newsprint market in clear decline remain significant and impact the market for recovered Newsprint. Factors that were once barely relevant, have in some cases become important market features in a significantly smaller market. In 2021-22, these factors were evident:

- **Newsprint consumption declined** by a larger margin than anticipated, albeit at a slower rate than in 2020, reducing the volumes available for economic separation of recovered Newsprint.
- **Publication closures and printing consolidations continued.**
- **Recovered Newsprint no longer a target material** for any Australian paper or paperboard manufacturer.
- **More disrupted secondary trade** in recovered Newsprint, between collectors, as domestic users seek access to increasingly scarce resource and export markets fluctuate on demand and price.
- **The pattern of major export nations changed**, with the exit of China as a market now complete and Indonesia becoming the significant destination.
- **Increased recovered paper stockpiling and disposal to landfill** distort recovery volumes but have a particularly strong impact on recycling volumes. It is not clear what movements occur into and out of stockpiles each year (inventory), including what may be disposed to landfill. This is especially an issue for recovered Newsprint derived from 'kerbside' sources and exported as part of the 'Unsorted' volume.
- **Economic viability of exports relies in part on volume, causing exporters to retain volumes** until they achieve a merchantable volume. This can impact prices, reducing the return to those who previously undertook some collections and even sorted some material.
- **Reuse of Newsprint by households** is potentially increasing as consumers contribute to the circular economy by ensuring resources are re-used for a wide variety of uses, including in cleaning, painting and gardens.

Previous research<sup>3</sup> indicates it is likely this volume totalled around 7.7% each year. Anecdotally at least, the same volume may be used by households, representing a larger proportion of the declining total consumption.

- **Australia's licencing regime for exporting recovered materials commenced operation**, with arrangements for fibre resources being prepared for implementation from mid-2024. Uncertainty has reduced the appetite for new speculative investments to recover dwindling supplies of materials like Newsprint.
- **Reluctance of some collectors to share information**, especially where the collector perceives a market advantage, no matter how small. It is possible Newsprint recovery is under-estimated as a result, especially where the material is transferred to small businesses operating in non-traditional end-uses (eg. roadside rehabilitation, composting and animal bedding).
- Trends towards **small 'social' collectors**, such as charitable organisations and clubs and societies (for example, Scouts, supported employment workplaces and so on) has become more significant. Their contribution is difficult to measure, as is the extent to which better quality recovered Newsprint is transferred from the state of collection to the domestic user. This trend is most evident for 'Non-Traditional' (Moulded Fibre, Pet Care and similar) and 'Other' forms of domestic re-use and will continue because there is higher marginal fibre value for many of these end-use products.

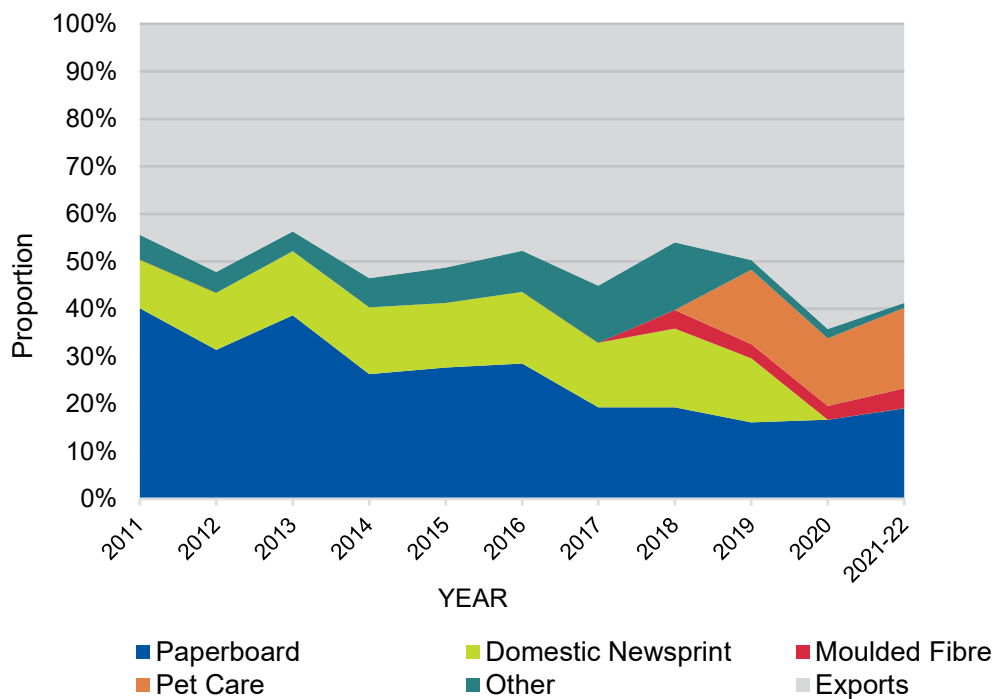
These additional transactions can cause miscounting and double counting of some collection data, especially related to the 'Other' forms of domestic recycling, which are continuing to grow as a proportion of the total.

The growing role of end-use applications like Moulded Fibre and Pet Care can be seen in the chart below.

<sup>3</sup> Nolan, Recovering More Newspapers for Recycling – Profiles and Strategies, ITU (2002)



## End Use of Recovered Newsprint by Sector: 2011 – 2021-22 (%)



Source: ABS & IndustryEdge research and estimates

Note: Moulded fibre was separated for the first time in 2018. It includes egg cartons, fruit trays and other products. Pet Care was separated for the first time in 2019. It includes kitty litter.

Since 2016, formal export data from the Australian Bureau of Statistics has been relied upon to calculate export volumes. This approach will continue, providing a stable base for future assessments.



# Pointers to the Future

**In 2021-22, Australian consumption of Newsprint was just less than 12% lower than for the year earlier <sup>4</sup> and almost 76% lower than for 2011. There is no other sector of the paper and paperboard, printing, publishing or communications industries and supply chain that has faced such challenges. Each year, it is anticipated there will be a slowing of the rate of decline, but rarely does that occur.**

Newsprint consumption peaked in 2008, since when it has declined at an average annual rate of 11.9%. It can be anticipated this rate of decline will slow at some time, but the future does include continuing declines in Newsprint consumption.

Pre-consumer volumes of Newsprint are necessarily becoming scarce as a consequence of declining consumption. Demand for publisher offcuts, over-runs and returns now exceeds supply. That cannot change.

Collection, segregation, sorting and supply of post-consumer recovered Newsprint is now very difficult and by volume and value, barely worth the effort in most Materials Recycling Facilities. Where it does occur, it is a mostly manual process, often sustained by a supported workforce.

Domestic re-processing of recovered Newsprint into any form of paper or paperboard will not increase. Demand from non-traditional re-processors in Australia (moulded fibre, pet litter, insulation, energy from waste and compost) are all continuing, but they can only reprocess what has previously been consumed. They search far and wide for supply of the best quality recovered Newsprint and are required to use multiple forms of fibre, where once their feedstock was entirely recovered Newsprint.

It may be a matter of passing interest, but pre-consumer recovered Newsprint exports (17,788 tonnes in 2021-22) now attract prices that can rival the prices for some grades of paper and paperboard. The largest volumes of recovered Newsprint are exported within the 'Unsorted' volume and often attract high prices, such is the value of the recovered fibre. As has been the case for several years, export in this form is likely to be the major fate of recovered Newsprint.

Exports of 'Unsorted' recovered paper will be under specific scrutiny as part of the Australian Government's consideration of the regulations pursuant to the Recycling and Waste Reduction Act 2020. The regulations to determine what grades of recovered paper can be exported and the specifications and conditions they need to meet to be exported will be known by mid-2023, to come into effect on 1st July 2024. Any direct or indirect limitation of exports of Unsorted recovered paper could impact Newsprint recovery rates if it resulted in increased volumes going to landfill.

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<sup>4</sup> Note the 2021-22 fiscal year data is compared with the 2020 calendar year data



# Understanding Australia's Newsprint Recovery Performance

**Though the market is challenging, Australia's Newsprint recovery rate is underpinned by the better-quality (mainly pre-consumer) grades of recovered Newsprint. The main constraint on higher recovery rates is there is no longer any domestic paper or paperboard producer specifically targeting Newsprint as a feedstock.**

Highest value demand no longer comes from recycling of Newsprint back into Newsprint. The best returns are made in the moulded fibre sector and the pet care sector. At least within Australia, those sectors can pay the most for recovered Newsprint. This aspect of the 'circular economy' continues to be important for Newsprint recovery and recycling, demonstrating there is value in the recovered material, beyond its recycling into paper and board.

The value of products like moulded fibre and kitty litter is important in that context and has potential to grow further. In future, this could improve recovery economics, supporting dedicated sorting to extract Newsprint.

Overall, recovery of separated Newsprint has become continuously more expensive as consumption has declined, contamination has increased, available volumes have reduced. Consequently, unit recovery costs continue to rise, in operations that are optimised only when operating at scale and to capacity and volume.

The increasingly important role of secondary collectors, and their transmission of specifically collected recovered Newsprint to more commercially focussed entities, provides some higher quality recovered Newsprint. This is an advantage at one level because it encourages separation close to source, including in regional areas, and can deliver higher-quality and more valuable Newsprint. Conversely, secondary collectors can add an additional step and costs into the supply-chain for a larger proportion of recovered Newsprint than perhaps ever before. There can be associated reporting issues with these secondary collectors because they can lack the systems and market level participation to provide reliable data.

The declining proportion of Newsprint in 'Unsorted' recovered paper bales is relevant, contributing to the inefficiency of segregation, and masking from plain view, the true size of Australia's recovered Newsprint exports.

Australia's relatively small markets and large distances between markets, work against higher recovery rates, especially of declining volumes of material. Compression of recovered paper bales, increased contamination and ultimately therefore, declining average quality of recovered Newsprint, are also working against its further segregation.



<sup>5</sup> Including the social collectors described earlier

# Process & Methodology

The tracking and recording of Newsprint recovery and recycling for 2021-22 was undertaken by IndustryEdge. The processes and worksheets were maintained consistent with the structure of work undertaken previously by IndustryEdge and devised by Dr Tony Wilkins.

The method involves calculation of Newsprint consumption by State and Territory, derived from a survey of publishers (ThinkNewsBrands members) and researching specific recovery of Newsprint undertaken pre-consumer and by sorting and general recovery through MRFs. The main research techniques are interviews and data analysis, including relying on 'bale audits' undertaken by collectors and periodically, industry bodies and government agencies.

Each year, there are changes to the process for researching and presenting the recovery and recycling figures for Newsprint. Over the longer-term, changes have been driven by the continued decline in consumption of Newsprint. This situation has required more diverse data series, and more granular data, being required to establish a reliable assessment of recovery and recycling

Process changes were introduced in 2016 and have since been expanded upon as the market environment has changed.



## These changes resulted in:

- Improved calculation of the volume of recovered Newsprint exported.
- Some volumes recovered in a State or Territory being reflected in another State or Territory's data, especially related to export volumes (arising because of interstate transfers and mainly impacting Victoria).• A more refined and ultimately, more conservative assessment of the Newsprint proportion contained within the Mixed or Unsorted recovered paper volume, using a variety of assessments and materials, noting that anecdotal evidence of the changing composition of kerbside commingled recycling bins requires more regular analysis, mainly by examining available bale audit data.
- More detailed analysis of the quantity of recovered Newsprint used in 'Other' applications, including the declaration of 'Moulded Fibre' as a specific application from 2018 and 'Pet Care' from 2019, rather than being part of the 'Other' designation. In the past, the 'Other' designation was used to ensure that confidential commercial information was not disclosed for sectors that use only small quantities of material. It is noted the specific description of Moulded Fibre and Pet Care has made some participants in those sectors less willing to share information.

Over time, IndustryEdge has reduced reliance on data supplied by collectors, due to some being unwilling to share data. To compensate for this, there has been increased use of data analysis tools, phone surveys and commentary from industry participants to 'find' and 'allocate' smaller volumes of recovered Newsprint to its end-uses.

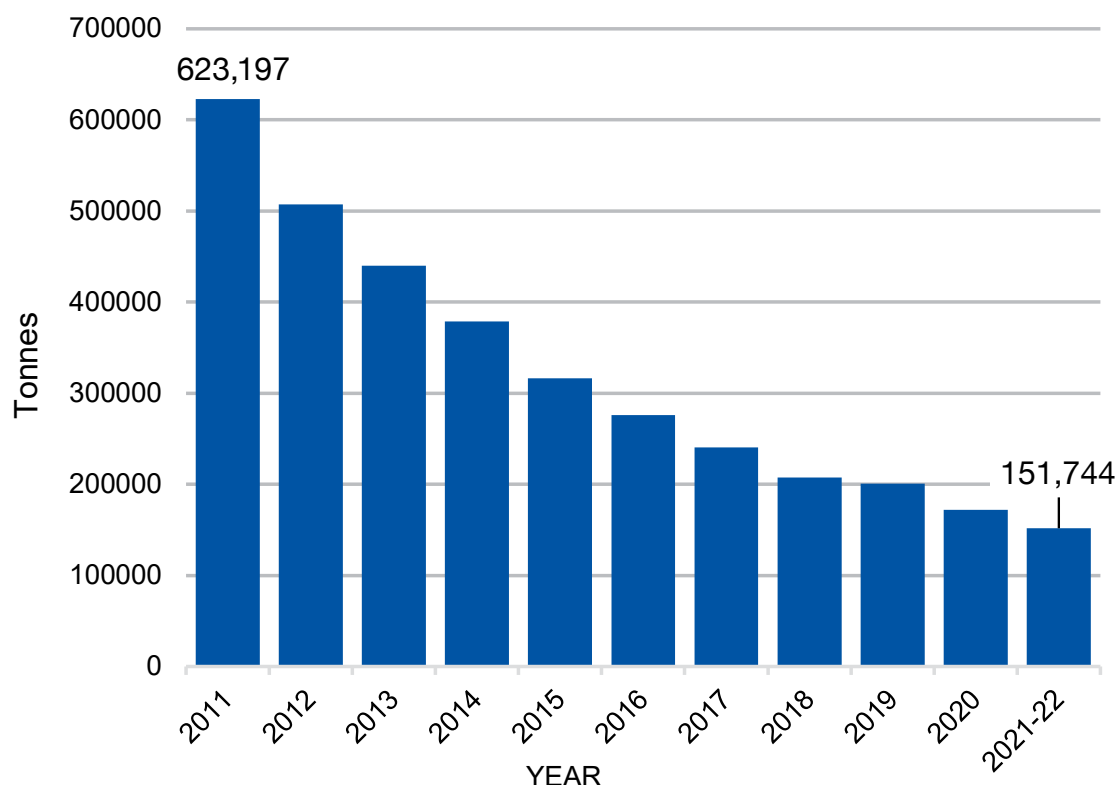
The methodology requires constant amendment to encourage, access and utilise data from collector-level audits, to gain greater insight into the proportions of recovered paper in the kerbside stream and 'Unsorted' export volumes.

# Structural Changes to Consumption of Newsprint

**Decline in consumption of newsprint continued in 2021-22. The decline from calendar year 2020 to fiscal year 2021-22 was 11.8%, implying an annual decline of 7.8%**

Publisher consumption of Newsprint peaked at 786,000 tonnes in 2005 and was very near that level in 2008. Since 2011, the Newsprint consumption rate has declined an average 13.2% per annum, or a massive 75.7% in aggregate.

**Australian Newsprint Consumption: 2011 – 2021-22 (tonnes)**



Source: ThinkNewsBrands & IndustryEdge

Drivers of reduced newsprint consumption include the rapid and permanent shift to digital publishing, communications and advertising continues to play havoc with demand for printed media of nearly all forms, in nearly all markets.

# Improvements in Recycling

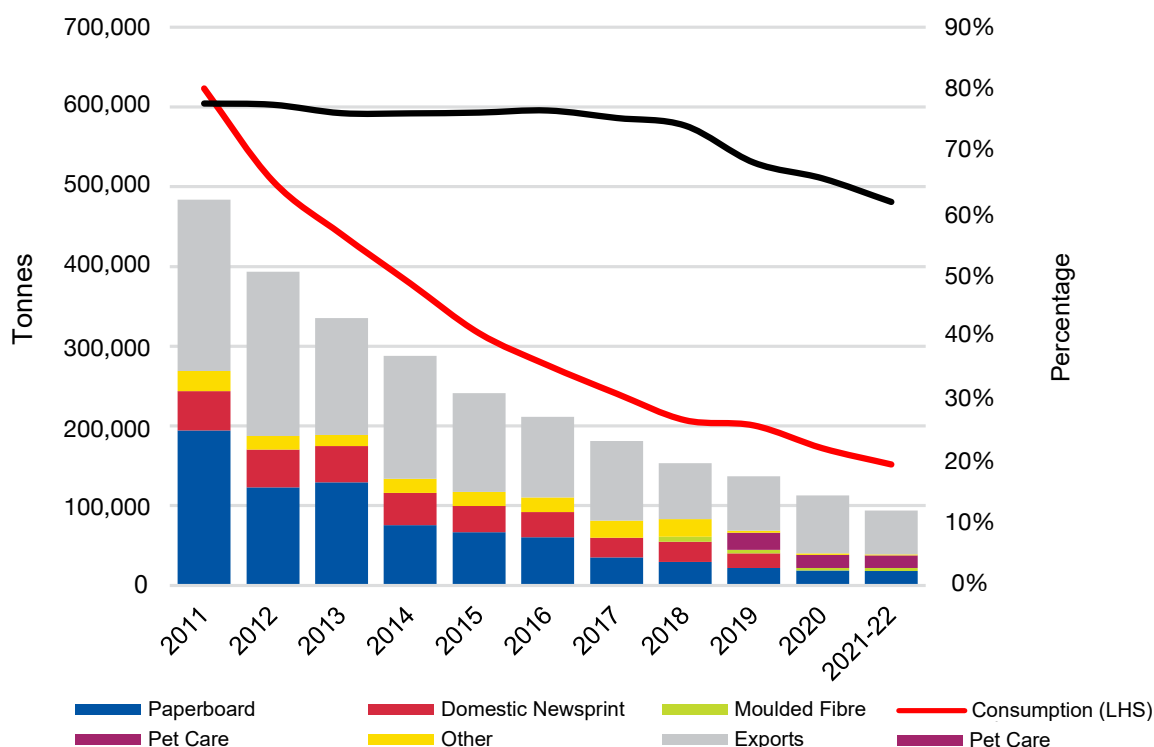
Led by ThinkNewsBrands and the voluntary undertakings committed to through it, the recovery of Newsprint peaked at 78.7% of consumption in 2010. In 2021-22 the national recycling rate of 61.8% was 5.8% lower than in 2020, diminishing at a slower rate than consumption, underscoring the importance of recovered Newsprint in domestic and international supply chains.

As consumption has declined, industry efforts to recover and recycle Newsprint have become more refined and increasingly targeted.

More effort, improved partnerships and higher costs are all elements of the modern Newsprint recovery and recycling process.

The chart below shows consumption and recovery volumes, along with the recovery rate. It is notable that as consumption declined, recovery rates have been far more stable, emphasising the efforts of the supply chain to recover Newsprint, and ensure its reutilisation.

**Newsprint Consumption & Recovery Volumes & Recovery Proportion: 2011 – 2021-22 (tonnes & %)**

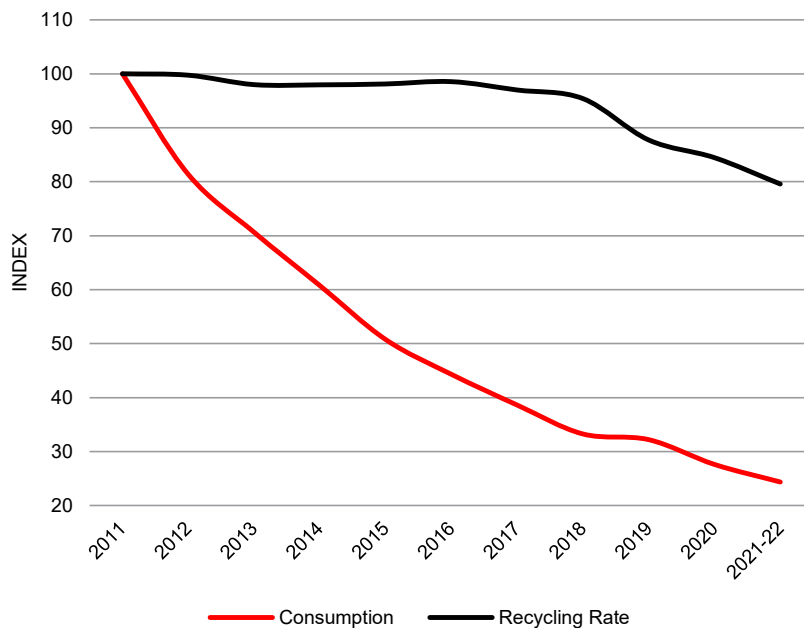


Source: ThinkNewsBrands & IndustryEdge

The index chart below shows, while consumption of newsprint has declined more than 75% since 2011, the recovery rate has fallen by just 15.9%. Any growth above this level of recovery would require source separation by consumers, or as part of recovered material content mandates imposed by Governments.

Paper only collection, with glass being removed from kerbside collections, is increasing across Australia, and has the prospect of improving the quality and recovery of Newsprint and other fibre resources.

## Index of Newsprint Consumption & ONP Recovery Rate: 2011 – 2021-22 INDEX (Base: 2011 = 100)



Source: ThinkNewsBrands & IndustryEdge

In 2021-22, recycling to all outcomes, other than moulded fibre, was lower than for the prior year. Total recovered Newsprint slipped below 100,000 tonnes for the first time since records began, falling to 93,827 tonnes.

For the sixth successive year, exports were the major end-use, accounting for 58.7% of the total recycled volume.

Given the challenges, the recycling rate of 61.8% confirms the effectiveness of the approach and programs of ThinkNewsBrands and its members.





## Paperboard

Demand for recovered Newsprint as part of the fibre furnish for the manufacturing of recycled paperboard fell in 2021-22. Producers no longer require recovered Newsprint, and they increasingly consider it unhelpful to efforts to meet their fibre needs.

In addition to falling consumption of Newsprint and the declining availability of recovered Newsprint, Australia's growing production and consumption of virgin kraft (deployed primarily in packaging paper and paperboard), high recovery rates for other fibre packaging and the very large volumes of paper and paperboard imported as packaging with goods, creates an abundance of high-quality strong recovered fibre for use in manufacturing recycled paperboard.

## Newsprint

Demand for Newsprint in Australia continues to fall and will not recover. Newsprint production in Australia is now reduced to production from one machine, at one mill, at Boyer, outside Hobart in Tasmania.

As a result of the closure of the Albury (NSW) mill, targeted recycling of recovered Newsprint, back into Newsprint, ceased in Australia, in late 2019. This has impacted the economics of recovery and the recovery rate since 2020.

## Moulded Fibre

First included as a specific end-use for recovered Newsprint in the 2018 report, the use of Newsprint in production of Moulded Fibre products is a long-standing activity. It was previously included in the 'Other' designation.

In 2021-22, ONP utilised by the Moulded Fibre sector accounted for 3,935 tonnes or 4.2% of the total.

This is a stable market, but one that is struggling to access sufficient quality material at a reasonable price, causing it to pursue alternative fibre opportunities.

## Pet Care

Pet care products, dominated by kitty litter, were included in the 2019 report as a separate product for the first time. This reflected the relative importance as an end-use application and the extent to which the sector is growing, in its own right.

In 2021-22, Pet Care activities accounted for 15,875 tonnes of recovered Newsprint, or 16.9% of total recovered Newsprint. The volume of recovered Newsprint used by this sector would reportedly be higher if more material was available.

## Other

'Other' utilisations now include only a small volume of recovered Newsprint deployed to purposes as diverse as Energy from Waste, home insulation and composting. The larger end-uses – Moulded Fibre and Pet Care – now being separately reported.

In 2021-22, other utilisations accounted for 1.0% or 980 tonnes of total end-uses.

## Exports

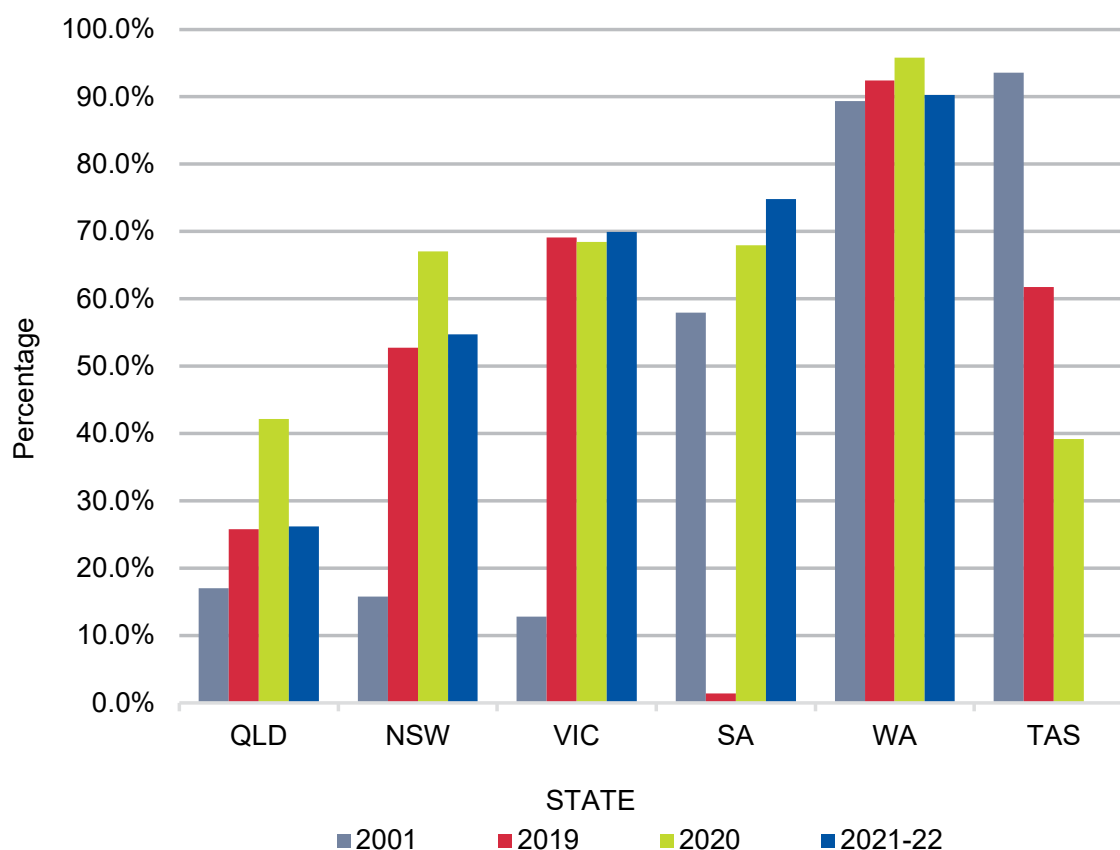
Export markets for recovered Newsprint are driven by international demand, standards and rules for recovered paper and paperboard, mostly from the paperboard and recovered Newsprint manufacturing sector in Indonesia. As set out earlier, impending regulation of recovered paper exports can be expected to impact the portion of recovered Newsprint exports contained in the 'Unsorted' volume.

Exports fell 24.0% in 2021-22, falling to a calculated 55,087 tonnes. This is made up of both specific recovered Newsprint exports, as well as the calculated proportions of recovered Newsprint within the 'Unsorted' export volume.

Recovered Newsprint export volumes peaked in 2008 at 233,665 tonnes, just at the onset of the Global Financial Crisis. Since then, export volumes have declined progressively.

The following chart shows the proportion of recovered Newsprint exported overseas by states from 2019 to 2021-22. Proportional figures for 2001 have been included for comparative purposes.

## Recovered Newsprint Exports as % of Total Recycled by State: 2001 & 2019 – 2021-22 (%)



Source: IndustryEdge \* ACT & NT not included

The export proportions of total recovery change continuously as international markets and local circumstances alter over time. Because there is no paper or paperboard manufacturing in Western Australia, its export proportion has always been high.

The chart compares each state, over time. It does not invite comparisons between states. An example is Tasmania (recovered Newsprint is shipped to Victoria before final export), where export proportions have varied widely.

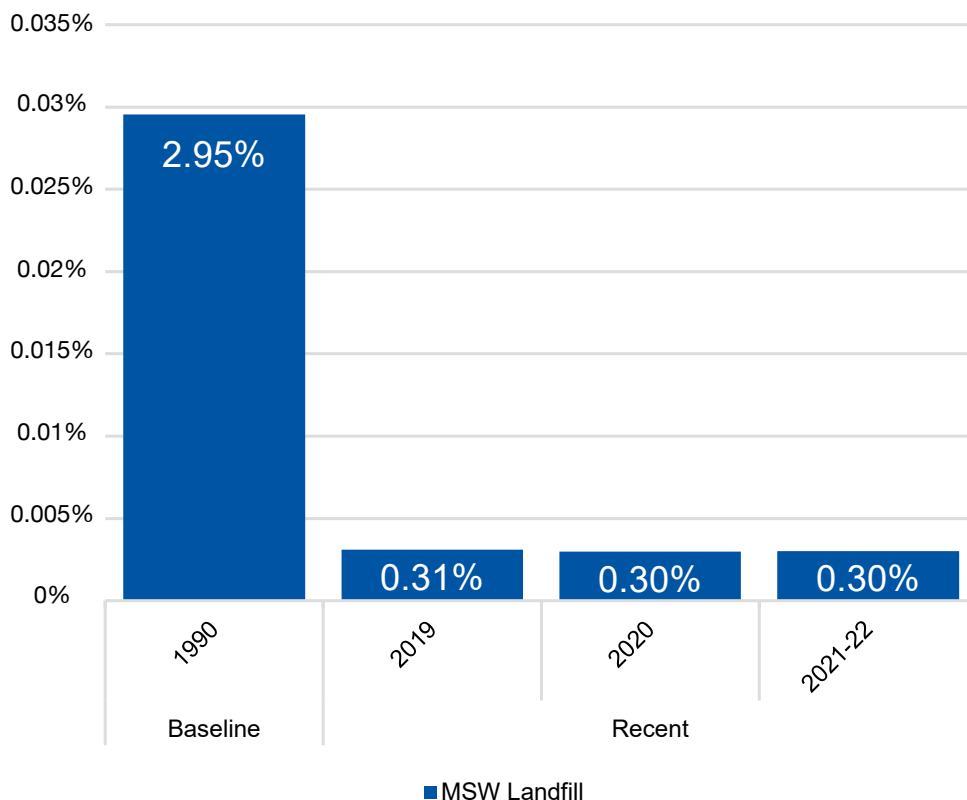
In 2021-22, increased reliance on actual export data, access to industry information, including some 'bale audit' data and a uniform assessment methodology continued. The methodology avoids double counting and miscounting of export volumes.

More importantly, reliance has been placed upon the audits and independent assessments of the volume of newsprint contained in 'Unsorted' recovered paper resources, to establish a calculated proportion of recovered Newsprint exported as part of what is commonly referred to as 'kerbside' collections. This volume has diminished very significantly, and again, is increasingly difficult to calculate.

### Disposal to Landfill

Latest data available to ThinkNewsBrands demonstrates the volume of newspapers in Municipal Solid Waste landfills has declined significantly since the baseline assessment in 1990, when 2.95% of newspapers ended in landfill. Three decades later and the proportion is just 0.3%.

**Proportion of Newspapers in MSW Landfill: 1990 v 2019 to 2021 (%)**



Source: ThinkNewsBrands

## Improvements in Recycling Rates

In 2021-22, the recycling rate for Newsprint was 61.8%. Although declining, in context of consumption falling at a much faster pace, this is a satisfactory result.

The loss of 'critical mass' is impacting supplies of recovered Newsprint to some of the alternative or other uses. Lower volumes of available material mean there is less available from pre-consumer sources and has resulted in reduced separation, to the point where there is no commercial scale separation of recovered Newsprint. There are now, in Australia, very few instances of specific separation, other than to support some of the alternative recycling options.

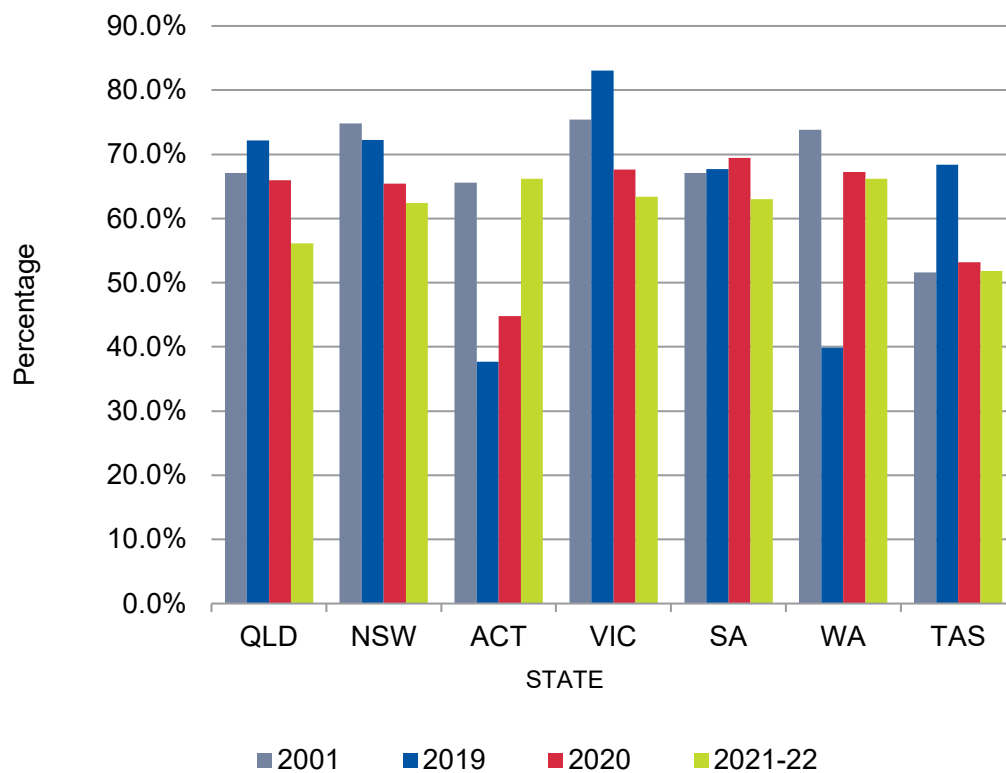
Newsprint recovery above 70% is a world's best practice outcome and was once achieved routinely in Australia.

Because of the geographic dispersal of the Australian population and the other structural changes described above, Australia's Newsprint recycling rate is both declining and lower than a small number of countries which have more concentrated population centres, have extensive platforms for source separation, and in some cases, are more advanced in supporting alternative end-use applications, including fates such as localised Energy from Waste (EfW) facilities.

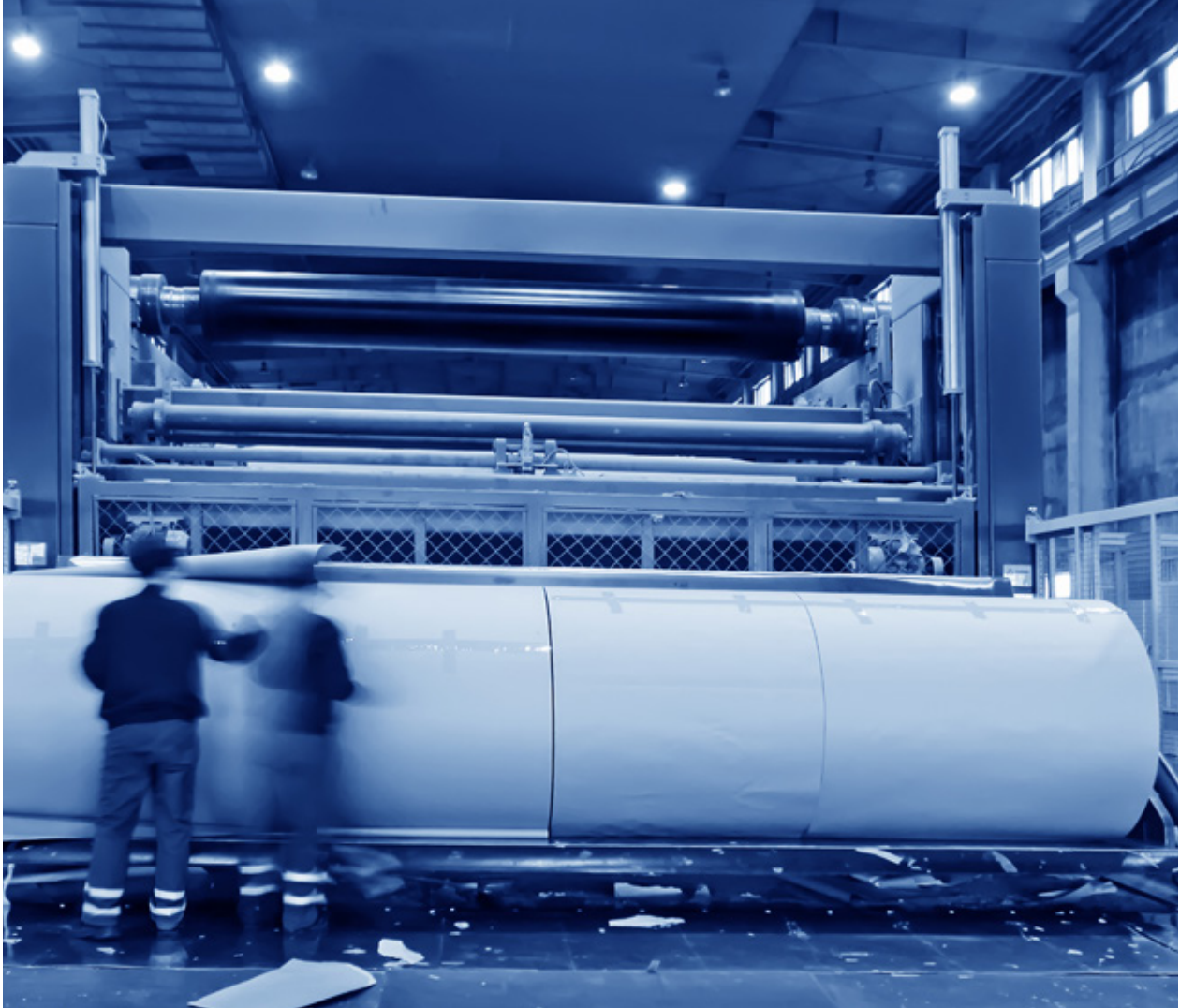
The following table and chart show the recycling rate achieved by states and territories from 2019 through to 2021-22, with 2001 included for comparative purposes.

### Recycling Rates of ONP by States: 2001 & 2019 – 2021-22 (%)

	2001	2019	2020	2021-22	% Change 2020 to 2021-22
<b>QLD</b>	67.1%	69.3%	72.1%	66.0%	56.2%
<b>NSW</b>	74.8%	75.2%	72.2%	65.4%	62.4%
<b>ACT</b>	65.6%	82.3%	37.6%	44.8%	66.2%
<b>VIC</b>	75.4%	76.4%	83.1%	67.6%	63.4%
<b>SA</b>	67.1%	79.1%	67.7%	69.4%	63.0%
<b>WA</b>	73.8%	74.9%	39.9%	67.3%	66.2%
<b>TAS</b>	51.6%	70.1%	68.4%	53.2%	51.8%
<b>NT</b>	25.4%	0.0%	0.0%	0.0%	54.2%
<b>National</b>	72.4%	68.2%	65.6%	64.7%	61.8%



Source: IndustryEdge



The larger states, New South Wales, Victoria and Queensland, had until recently shown relative stability in recovery rates, but that stability is dwindling as recovery becomes more complex and available pre-consumer volumes are derived from a smaller number of facilities.

Apparent Victorian recovery data remains subject to annual variation, in part because it receives volumes from both South Australia and Tasmania that are reported by the recovery sector for Victoria, and some of which is exported from Victoria.

Improvement in the South Australian recovery rate in 2021-22 may prove to be short-lived but could also be linked to recent investments in improved sorting and separation.

2021-22 saw state recycling rates vary, except for stability in Victoria and Tasmania. The last two years may have seen a consolidation of the small quantity of recovered Newsprint entering Victoria from Tasmania

The national recycling rate is increasingly made up of varied state experiences, rather than clear and consistent trends across the jurisdictions. In 2020, the national proportional rate for the recovery of Newsprint was 61.8%.



# Appendix 1

## The Product Stewardship Journey

**EAG annual Product Stewardship Members  
Consumption and Recycling Questionnaire Report  
Financial year 2022**

This survey was completed by ThinkNewsBrands members in order to provide the data required to allow assessment of the industry product stewardship scheme progress. The financial year provides the baseline prior to accreditation applied for under the Product Stewardship Act (2011).

While not all data was available at all print sites when completing this questionnaire, it can be confirmed that all of the major print sites provided almost all of the required information. Notes have been made in the summary of responses below where data has been difficult to obtain, it is normally associated with items such as electronics that would measure in a few kilograms. Of course, efforts will be made during the first reporting year to ensure these figures are further refined in terms of coverage and accuracy where possible.



# Members Questionnaire

1. Australian total national newsprint consumption: 150,244 tonnes. Details broken down by State are shown in the attached summary. ThinkNewsBrands members print some 90 percent of the total consumption.

2. Report the recycling rate for each of the following products (known as in-scope materials) used in production:

	Percent recycled and/or Tonnes/ items	
a) Publication overruns (tonnes)	100%	10,839 Tonnes
b) Unsold returns able to be recovered (tonnes)	NA	16,702
Note: does not include supermarkets		
c) Aluminium printing plates	100%	3,440,828
d) Cardboard and paper packaging	100%	647
e) Electronic equipment (no. units)	100%	NA
Note while sites report a very small number of electronic equipment is recycled it is rare for equipment to fail, and no accurate number was available as it is all sent to head office for recycling with other equipment.		
f) Oil (litres)	100%	73,300
g) Plastic wrapping	100%	17.76
h) Printing inks (note residue returned to supplier)	100%	NA
Note: the quantity of printing ink isn't measurable as any small residual that is left goes automatically back to the supplier for recycling		
i) Toner and ink cartridges (unavailable at all sites)	100%	170
Note this figure was not available for some sites and is expected to have improved accuracy next year		
j) Blanket wash (litres, includes some wash water)	100%	22,410
Note this can include some blanket wash contaminated wash water that is also treated in the recycling process		
k) Paper reel cores tonnes (estimate at some sites)	100%	763

**3. Can you confirm your company has policy and procedures in place which comply with relevant state and territory environmental and OH&S regulations?**

- a. Yes, all members comply with all OH&S procedures
- b. News Corp Australia supplied a copy of their environment policy

**4. List any increase or decrease in the use of environmentally sustainable products and materials used in production?**

- a. As FY22 is the base year, changes are expected to be reported next year

**5. Has there been any increase or decrease in the proportion of unsold newspapers and magazines that are both collected and recycled?**

- a. No change was expected to have occurred by some members but as this was the base year this will be reported in year

**6. Has there been an increase or decrease in the proportion of in-scope materials that are both collected and recycled?**

- a. No generally, but for some materials this base year will be examined for changes next year

**7. Has there been an increase or decrease in the proportion of unsold newspapers and magazines that go to landfill?**

- a. None expected comparing to the previous year, this base year will provide the starting point for this comparison next year

**8. Has there been an increase or decrease in the proportion of other in-scope materials listed in question 2 that go to landfill?**

- a. None expected comparing to the previous year, this base year will provide the starting point for this comparison next year

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