

Newsprint Recovery & Recycling in Australia

2024-25

Analysis and report prepared for ThinkNewsBrands Limited



Research and report preparation by
IndustryEdge Pty Ltd
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Acknowledgements

IndustryEdge acknowledges and pays respects to the custodians of the lands of the region to which this assessment refers, and of the lands on which this analysis was prepared, the Waddawurrung people.

Disclaimer

Although great care has been taken to ensure accuracy and completeness in this market review, no legal responsibility can be accepted by IndustryEdge Pty Ltd for any decisions taken by readers of this report.

Summary

In 2024-25, the proportional national recovery rate for Newsprint was 65.0%, an increase of 5.2% on 2023-24. Newsprint consumption by publishers fell for the fourteenth successive year, falling below 100,000 tonnes per annum for the first time. The annual consumption decline of 8.4% emphasises the ongoing challenges for recovery volumes, economics and viability.

Newsprint consumption by major publishers in Australia declined by 8.4% in 2024-25, falling to 95,519 tonnes, the lowest level ever recorded.

Over the decade since 2014, Newsprint consumption in Australia has declined an average 12.9% per annum for newspapers. Continually falling consumption means assessing recovery of Newsprint is increasingly complex, with relatively small volume changes representing increasingly large proportional changes. This experience adds to inter-annual volatility in recovery rates.

Newspapers are mainly disposed via kerbside and office commingled collections and therefore make their way through the nation's Materials Recovery Facilities (MRFs) mixed with other grades of paper and paperboard. As consumption declines, they are ever more difficult to discern in the aggregated volume. Since 2021, there has been no commercial separation of recovered Newsprint in MRFs.

In consequence, the majority of recovered Newsprint is found in 'Unsorted' recovered paper volumes that are destined either for supply to paperboard recycling mills or export. Only a small volume is exported specifically as recovered Newsprint, and even that is often blended with similar grades of recovered paper.¹

Notably, the domestic paperboard mills (manufacturing recycled containerboard or corrugated box grades of paperboard) do not target recovered Newsprint, as was once the case when consumption and recovery volumes were significantly higher.

Under considerable pressure, the recovery rate reflects the challenges faced by the Newsprint sector and for all grades of printing and communication paper.

The key data is set out in the table below.

Annual Recovery Statistics for Recovered Newsprint: 2021 – 2024-25 (tonnes & %)

	2021-22	2022-23	2023-24	2024-25	% Change CURRENT
Consumption (t)	151,744	118,192	104,313	95,519	-8.4%
Input to paperboard	17,950	16,200	15,647	17,904	14.4%
Input to other outcomes	20,790	12,229	8,345	6,488	-22.3%
Exports	55,087	43,750	38,406	37,707	-1.8%
Total Recovery	93,827	72,179	62,398	62,099	-0.5%
Recovery Rate	61.8%	61.1%	59.8%	65.0%	8.7%
Unrecovered Newsprint	57,917	46,013	41,915	33,420	-20.3%

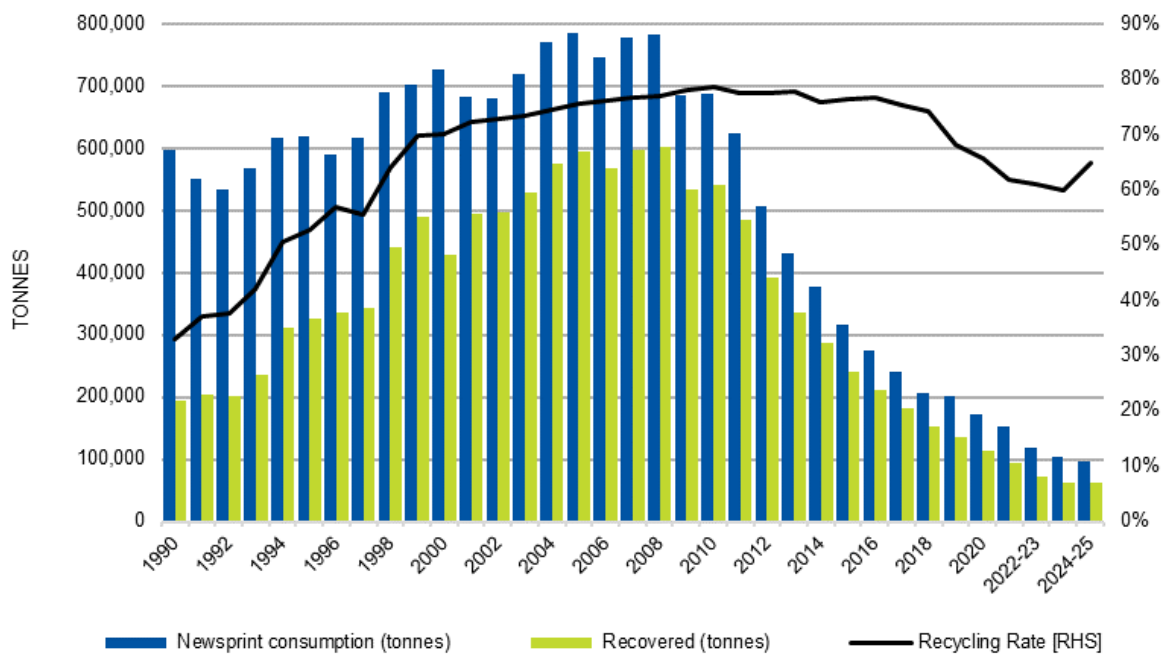
Source: IndustryEdge 2025

Note: The column titled '% Change' is the difference between the figures for 2022-23 and 2023-24, expressed as a proportion of the 2022-23 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.

¹ Specific recovered newsprint is exported under the Australian Harmonised Export Classification Codes (AHECC) 4707.3 designation. In 2024-25, Australia's exports totalled 49,754 tonnes.

Australian Newsprint Consumption, Recovery and Recovery Rate: 1990 – 2024-25 (tonnes & %)



Source: ThinkNewsBrands & IndustryEdge

Australian paper and paperboard producers ceased targeting recovered Newsprint as an input to recycled packaging production almost fifteen years ago as consumption and recovery volumes commenced their steep deterioration. The potentially available volumes are too small for there to be a viable economic incentive to specifically sort recovered Newsprint from kerbside recovered volumes for any purpose.

As consumption declines, Newsprint has become continually more difficult to discern, segregate or specifically measure, particularly in the 'Unsorted' export volume, primarily derived from comingled kerbside collections.

Only pre-consumer Newsprint volumes are specifically sought. The fates of pre-consumer Newsprint are primarily Export, supplemented by domestic Pet Care (kitty litter) and Moulded Fibre (egg cartons) production.

Importantly, the implementation of the Commonwealth *Recycling and Waste Reduction Act 2020* appears to have had a material impact on declaration of exports of recovered paper. Since becoming operable for exports of recovered paper on 1st July 2024, greater attention has been paid to export segregations and designations, providing increased clarity.

The Product Stewardship Journey

Australia's newspaper and magazine publishers started working together on Environment matters at the start of 1990, formally commencing their newspaper and magazine Product Stewardship Scheme in 1992. Publishers 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.

The NESA is now accredited 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.

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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

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

In Australia, consumption of Newsprint has declined by an average 14.3% per annum since 2021-22, or a total of 37.1% over the same period. This continues to be a global experience. The Australian situation is like Western Europe, albeit with sometimes varying proportional declines.

Capacity closures and conversions (mainly to manufacture packaging paper and paperboard) contribute to what remains a tightly balanced global Newsprint market. The total market is increasingly sensitive to even relatively small or short-lived changes in demand and supply dynamics.

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

The seemingly brutal impact of the pandemic saw publisher's demand for Newsprint decline 14.3% in 2020 and a further 11.8% for the eighteen months ended June 2022. Although not surprising given the long experience of demand declines, the Australian industry was shocked by the stunning 22.1% fall in consumption recorded by publishers in 2022-23, but now seems resigned to the double-digit declines, including the 11.7% consumption fall recorded in 2023-24.

At the end of 2021-22, Newsprint consumption in Australia was just over 151,000 tonnes. By the end of 2024-25, consumption had crashed to around 95,500 tonnes.

Consumption declines are not the result of major global events such as the Global Financial Crisis or the COVID19 pandemic. These and other events may have accelerated declines in Newsprint consumption, but the driver is the rise of digital technology and electronic communications.

The following market events and factors influenced Newsprint consumption, recovery and recycling in 2024-25:

- **Continued decline in Newsprint consumption**, with publisher's reporting total consumption declining to 95,519 tonnes.²
- There has been **no targeted domestic use of recovered Newsprint for recycling into paper and paperboard** since 2020.
- **Sorting in a small number of social enterprises continues** but is reportedly delivering a declining volume of recovered Newsprint and must be considered marginal.
- **Recovered Newsprint presence in the manufacture of paper and paperboard is now entirely incidental**, associated with the intake of Unsorted recovered paper, which contains a proportion of Newsprint.
- Targeted use of **recovered Newsprint in applications like pet care (kitty litter) moulded fibre and insulation are sourced from pre-consumer volumes**, via the Commercial & Industrial sector. These recycling end-use volumes are sufficiently discreet they are now aggregated as 'Other'. Identifiable volumes totalled 6,488 tonnes in 2024-25, more than 22% lower than the prior year.
- **Exports of recovered Newsprint are more observable**, thanks in part to application of the *Recycling and Waste Reduction Act 2020*, as available volumes reduce and exports of 'Mixed' or 'Other' unsorted recovered paper continue.

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

- **Changing pattern of export partner countries for Australian recovered paper**, including Newsprint. Indonesia, Malaysia, Vietnam and Thailand are now the major recipients of Australia's recovered fibre, where the main targets are Old Corrugated Cartons (OCC) and Unsorted or Mixed recovered paper. Both 'grades' are used almost entirely for manufacture of recycled corrugated boxes, with limited specific demand for Newsprint.

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 2024-25, these factors were evident:

- **Newsprint consumption continues to decline**, weakening the entire supply chain and reducing the volumes available in the Commercial and Industrial sector (from Publishers and Printers) and no longer being identifiable and sorted from the Kerbside commingled or Municipal Solid Waste sector.
- **Publication closures and printing consolidations** have slowed, with de-pagination a continuing threat to total consumption and recovery volumes, as well as to individual mastheads and publishers.
- **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, causing some secondary end-users (eg. insulation manufacturers) to cease pursuing recovered Newsprint as feedstock and others to be increasingly priced out of the market.
- **The pattern of major export nations has stabilised** to the point major recipient nations (led by Indonesia) focussed on production of recycled corrugated packaging, to the exclusion of almost all else, reducing any residual impetus for sorting of Newsprint in Australia.
- **Stockpiling and inventory impacts are more pronounced** because smaller volumes of recovered paper are stored for longer to make merchantable loads, increasing costs and reducing market transparency. This is a particular challenge for specific grades like recovered Newsprint.
- **Australia's licencing regime for exporting recovered materials** has commenced, with the regulations impacting the Unsorted/Mixed volume primarily recovered from comingled kerbside collections. The direct implications have been relevant for recovered Newsprint with improvements in reporting of specific volumes indicating more accurately the volumes being exported.
- **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).
- **Small 'social' collectors are also difficult to identify**, but their volumes are largely expected to be incorporated in end-use collections for the 'other' uses and for Export.

Since 2016, formal export data from the Australian Bureau of Statistics has been relied upon to calculate export volumes.

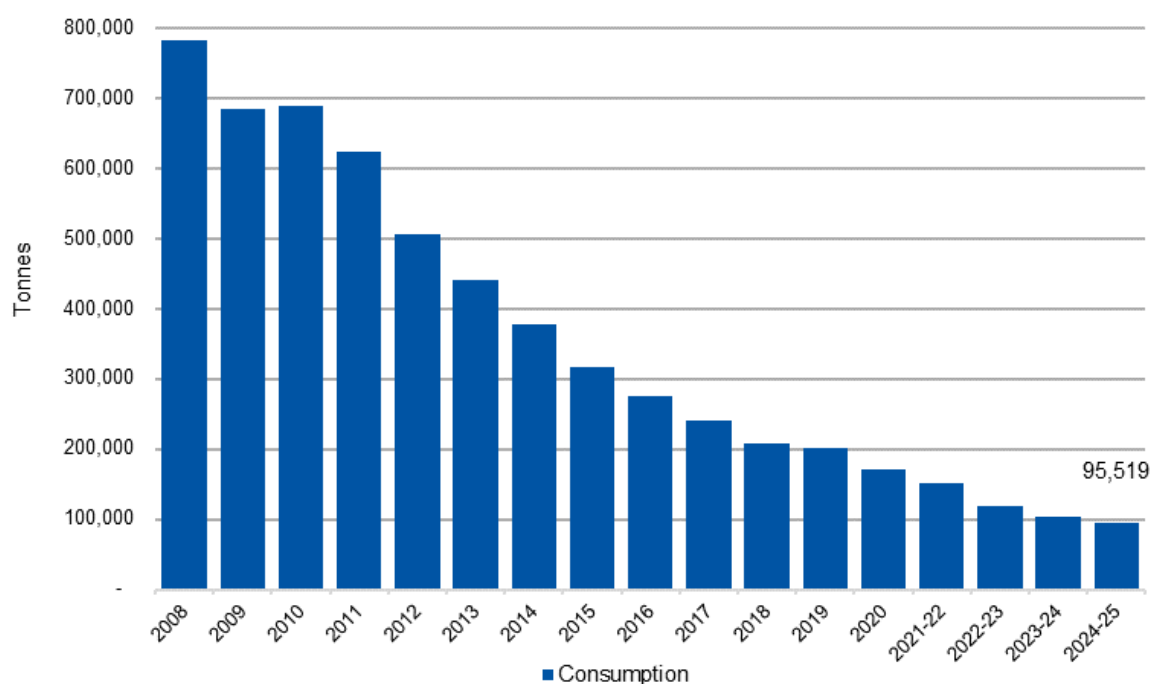
This approach must continue, providing certainty surrounding specific export volumes, but relying on industry intelligence to inform the proportion of Newsprint in the Unsorted recovered paper export volume. See the Methodologies Appendix for further details.

Structural changes to Newsprint consumption

Decline in consumption of newsprint continued in 2024-25. The deterioration of consumption was 8.4% or 8,794 tonnes, compared with the prior year.

Publisher consumption of Newsprint peaked at 786,000 tonnes in 2005 and was very near that level in 2008. Since 2008, the Newsprint consumption rate has declined an average 12.3% per annum, or a massive 88% in aggregate.

Australian Newsprint Consumption: 2008 – 2024-25 (tonnes)



Source: ThinkNewsBrands & IndustryEdge

Future directions for recovered Newsprint markets

No other sector of the paper and paperboard, printing, publishing or communications industries and supply chain has faced the challenges of the Newsprint sector.

Newsprint consumption peaked in 2008, since when it has declined at an average annual rate of 12.3%. The rate of decline will slow, but consumption is now just 12% of the 2008 level.

Recovered Newsprint is necessarily becoming scarce. Demand for publisher offcuts, over-runs and returns now exceeds supply, driving prices higher, including for exports. That will not change.

Collection, segregation, sorting and supply of post-consumer recovered Newsprint is now so difficult and expensive, it has ended, to all intents and purposes. Where it does occur, it is a mainly manual process, often sustained by a supported workforce, yielding very small volumes.

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.

Their supply is dwindling, as the data for 2024-25 demonstrates. They increasingly use multiple forms of fibre, where once their feedstock was entirely recovered Newsprint.

The largest volumes of recovered Newsprint are exported within the 'Unsorted' volume. As has been the case for several years, export in this form will be the major fate of recovered Newsprint.

Recovered Newsprint market

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 the falling consumption and therefore, availability of supply of recovered Newsprint.

From a value perspective, recovered Newsprint's best returns appear to be available from exports and domestically, from the moulded fibre sector and the pet care sector. In 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 recycling into paper and board.

The end-values of products like moulded fibre and kitty litter are important because they assist in meeting increasing supply chain costs, including those related to rising recovered Newsprint prices.

This market dynamic will continue as 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 a dwindling supply of 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.

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.

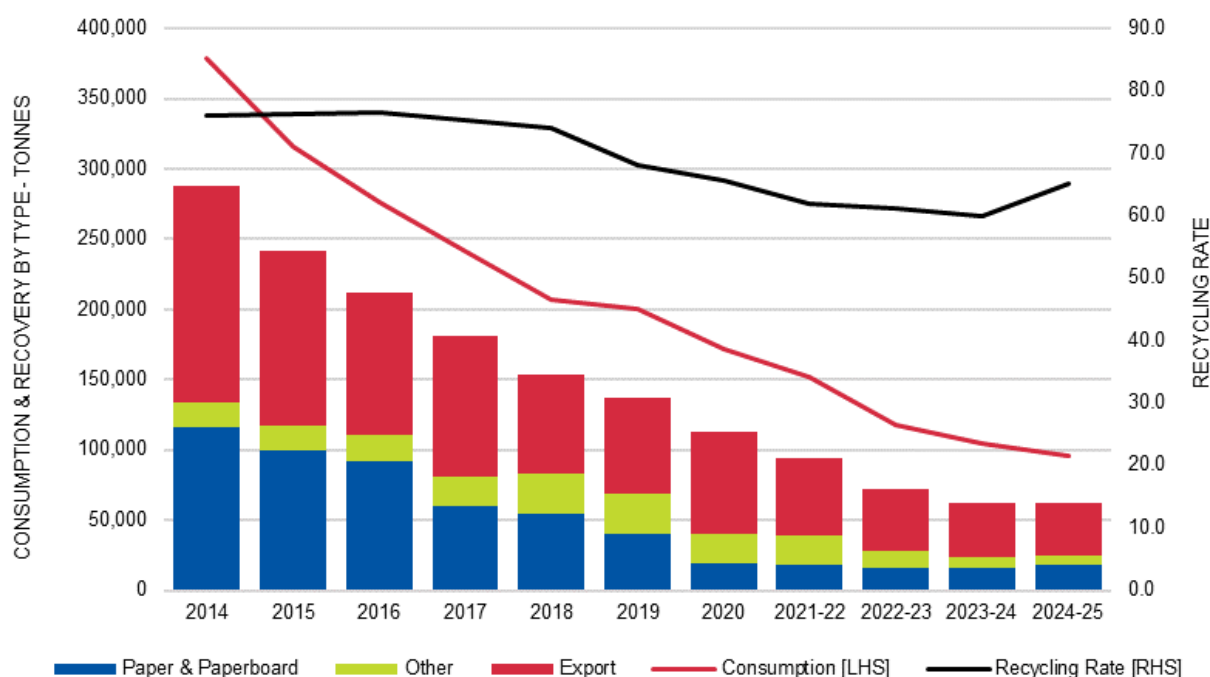
Australia's relatively small markets and large distances between markets, work against higher recovery rates, especially of declining volumes of material. Compression of recovered paper bales, increased contamination and ultimately therefore, declining average quality of recovered Newsprint, are also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

Recycling outcomes for recovered Newsprint

Led by *ThinkNewsBrands* and the voluntary undertakings committed to through it, the recovery of Newsprint peaked at 78.7% of consumption in 2010. In 2024-25, the national recycling rate of 65.0%, was up significantly on the prior year. The recovery rate is now likely to be volatile, as small volume changes have a proportionally larger impact.

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: 2014 – 2024-25 (tonnes & %)

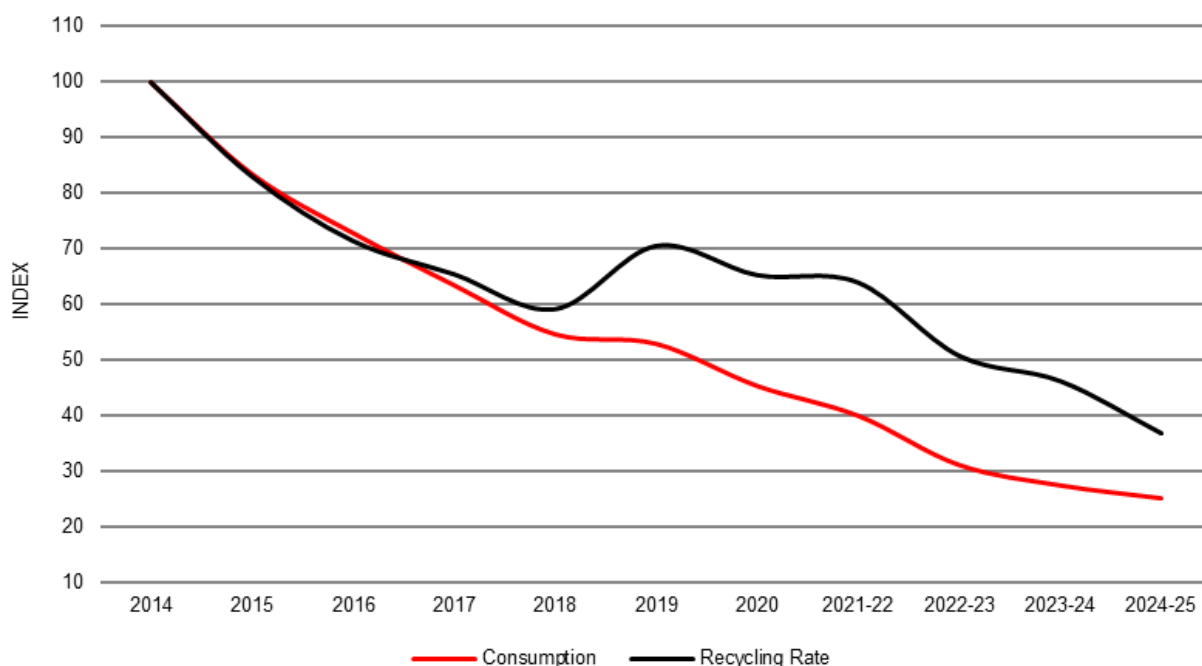


Source: ThinkNewsBrands & IndustryEdge

The index chart below shows, while consumption of newsprint has declined almost 75% since 2014, the recovery rate has fallen by just 14.6%.

Any sustained growth in recovery would require source separation by consumers – a radical and unlikely system change. 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 but comes at increased cost.

Index of Newsprint Consumption & ONP Recovery Rate: 2014 – 2024-25 INDEX (Base: 2014 = 100)



Source: ThinkNewsBrands & IndustryEdge

In 2024-25, recycling to all outcomes was lower than for the prior year. Total recovered Newsprint slipped to an all-time low of 62,090 tonnes, a fall of 0.5% on the prior year.

For the eighth successive year, exports were the major end-use, accounting for 60.7% of the total recycled volume.

Given the challenges, the recycling rate of 65.0% confirms the effectiveness of the approach and programs of ThinkNewsBrands and its members.

Recycling to Paper & Paperboard

Use of recovered Newsprint as part of the fibre furnish for the manufacturing of recycled paperboard rose marginally in 2024-25, up 14.4% on the prior year to total 17,904 tonnes. Producers no longer require recovered Newsprint, and they increasingly consider it unhelpful to efforts to meet their fibre needs.

Recycling to Other Uses

'Other' utilisations now include the larger users (pet car or kitty litter and moulded fibre), in addition to the small volume of recovered Newsprint deployed to purposes as diverse as Energy from Waste, home insulation and composting.

In 2024-25, other utilisations are calculated to have accounted for 10.4% or 6,488 tonnes of recovered Newsprint.

Exports

Export markets for recovered Newsprint are driven by international demand, quality specifications and standards and rules for recovered paper and paperboard.

Exports fell 1.8% in 2024-25, falling to a calculated 37,707 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.

2024-25 Newsprint recycling rate

In 2024-25, the recycling rate for Newsprint was 65.0%, up 8.7% on the prior year.

Although declining, in context of consumption falling at a much faster pace, this is a satisfactory result. Newsprint recovery above 70% is a world's best practice outcome and was once achieved routinely in Australia. That level of recovery is now beyond Australia unless it was to introduce source separation requirements at the household and business level.

The loss of 'critical mass' has reduced supplies of recovered Newsprint to some of the alternative or other uses. Lower volumes of material mean there is less available from pre-consumer sources and has also 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.

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 and have extensive platforms for source separation.

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.

APPENDIX 1

Research process & methodology

The tracking, recording and calculation of Newsprint recovery and recycling for 2023-24 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 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.

Due to declining response rates and very low volumes of recovered Newsprint being evident in fibre recovery streams, research techniques involving interviews and data analysis have been supplemented by the application of data obtained confidentially of 'bale audits' undertaken by collectors and periodically, industry bodies and government agencies.

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

In 2024-25, these ongoing changes resulted in:

- Calculation of the proportion of recovered Newsprint in the 'Unsorted' recovered paper export volume, based on available bale audit data. This was calculated as 2.5% of the reported total.
- Calculation of the proportion of recovered Newsprint in the 'Mechanical' recovered paper export volume, based on industry intelligence. This was calculated as 66.6% of the reported total.
- Calculation of the proportion of recovered Newsprint in the feedstock reported to be delivered to Australia's domestic Paper & Paperboard re-processors, based on available data. This was calculated as 0.85% of the reported total.
- Aggregation of the 'Other' domestic recycling outcomes for recovered Newsprint, to avoid double-counting between an ever-diminishing number of end-users.
- Cessation of reporting recovery of Newsprint at the State and Territory level to avoid double-counting.

Over time, IndustryEdge has reduced reliance on data supplied by collectors, due to some being unwilling to share data and the risks of double-counting in a sector where fibre transactions are routine. 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.

APPENDIX 2

[supplied by ThinkNewsBrands]

Newsprint Recovery & Recycling in Australia 2024-25

Analysis and report prepared for ThinkNewsBrands Limited



Summary

Recycling of newspapers continues to be an Australian success story with recycling rising to 65% of newspapers recycled in 2024-25. This is near the best in the world and up from 60% in FY2023/24. Australia was only recycling 28% of its old newspapers back in 1989 before the Scheme began.

The Product Stewardship Journey

Australia's newspaper and magazine publishers started working together on Environment matters at the start of 1990, formally commencing their newspaper and magazine Product Stewardship Scheme in 1992. Publishers have now been awarded "accreditation" under the Federal Government's completed their sixth successive five-year product stewardship plan known as the 'National Environment Sustainability Agreement for newspapers and magazines (NESA)'.

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EAG annual Product Stewardship Members Consumption and Recycling Questionnaire Report

Financial year 2025

This survey was completed by Scheme 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).

The questionnaire was first run in FY22 to provide a baseline to allow recording of continual improvement in the data collection and analysis process. FY24 data has provided a year on year comparison.

There has been an increase or decrease in the proportion of some in-scope materials that are both collected and recycled. For some materials significant variations occurred, notably for the following:

- i. The recovery of rate for unsold newspapers (returns) remains about the same with a recovery rate of approximately 79%. Figures for tonnages collected are estimates as raw numbers of newspapers collected are used and estimates of average newspaper weights are then used to convert this to tonnages.
- ii. Most plastic waste is collected but not sold to recyclers.
- iii. Printing ink residue is returned to the supplier essentially meaning zero waste on-site.
- iv. Aluminium printing plates are all recycled but significant drops in usage have been reported (-66%).
- v. Efforts to ensure cardboard and paper packaging are kept clean and collected effectively have seen an increase of 591% recycled.