



Sustainability: **Developing Corrugated Packaging's** **New Message Platform**



Where we've been

Spring 2008

- Work began with Artemis Strategy Group

Summer

- Artemis completed message strategy research

Fall

- Identified need for creative resources

Winter 2009

- concept development - creative, communications plan based on:
 - Message strategy research
 - LCA, NCASI additional data +

Methodology:

- 2-day information gathering meeting in April 2008
- Series of interviews including 18 one-on-one in-depth interview with industry leaders
- Second wave of interviews with 12 original respondents and 28 packaging purchasers and specifiers using PTIS roundtable panel

Deliverables:

- Strategy presentation in 4 sections (definition, vision, promise and supporting elements)
- Narrative methodology and decision-making document

Results...

Sustainability



**Environmental stewardship
and conservation**

The diagram consists of three overlapping circles. The top circle is the lightest shade of green and contains the text 'Environmental stewardship and conservation'. The bottom-left circle is a medium shade of green and contains the text 'Economic viability and contribution'. The bottom-right circle is the darkest shade of green and contains the text 'Social responsibility and engagement for the common good'. The circles overlap in the center, creating a central area where all three pillars intersect.

**Economic viability
and contribution**

**Social responsibility
and engagement for
the common good**

VISION

Sustainability is a new word for how this industry has always managed its business

- Because of our relationship to natural resources we have long understood the connections between our economic performance, responsible environmental stewardship and the positive impact of our products on people's everyday lives

Our Promise

To build on our long history at the forefront of sustainability efforts by continuously improving our performance relative to how we:

- Manage and use our renewable natural resources
- Operate our plants and production facilities
- Design our products to minimize fiber content while maximizing protection, health and safety
- Encourage and enable reuse and recycling of our products
- Recover and reuse recycled content in new products
- Manage our businesses toward long-term stability as good employers and as important contributors to the large economy
- Help, through design work, enhance and ensure the high levels of safety and healthfulness of the products within our package.

Use of Messaging

Short-term objectives:

- Written statement of organization's position
- Update of current collateral materials
- Communication of study results (LCA)

Long-term (1 to 2 yr.) objective:

- Foundation for a CPA Campaign 2009

of Points

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Sweet Spot

Sustainability



Bader Rutter

- Founded in 1974; Milwaukee, Chicago and Lincoln
- Strong B2B and consumer experience
- Industry marketing expertise
- Understand sustainability/responsibility

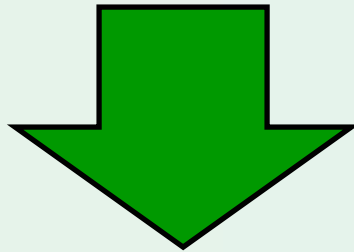


SUSTAINABLE FORESTRY INITIATIVE

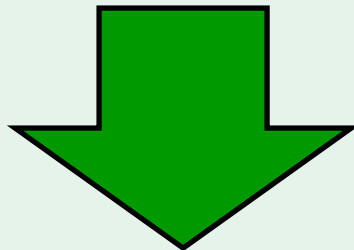
The Decision Process



Not in the Market



Consideration



Decision

Category/ Industry
Decision

Brand Decision

Point of Purchase

Category Marketing Programs

- 1) Universal understanding of the common problem (and desired outcome)
- 2) Participation across the entire industry
- 3) An equitable funding mechanism
- 4) A real solution to the problem ... on the audience's terms
- 5) An understanding that the best defense is a strong offense
- 6) Making it news
- 7) Measurement and reporting of the program's performance
- 8) A commitment to a long-term solution

Message Development

Credibility

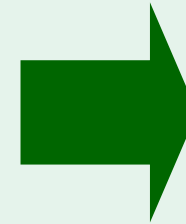
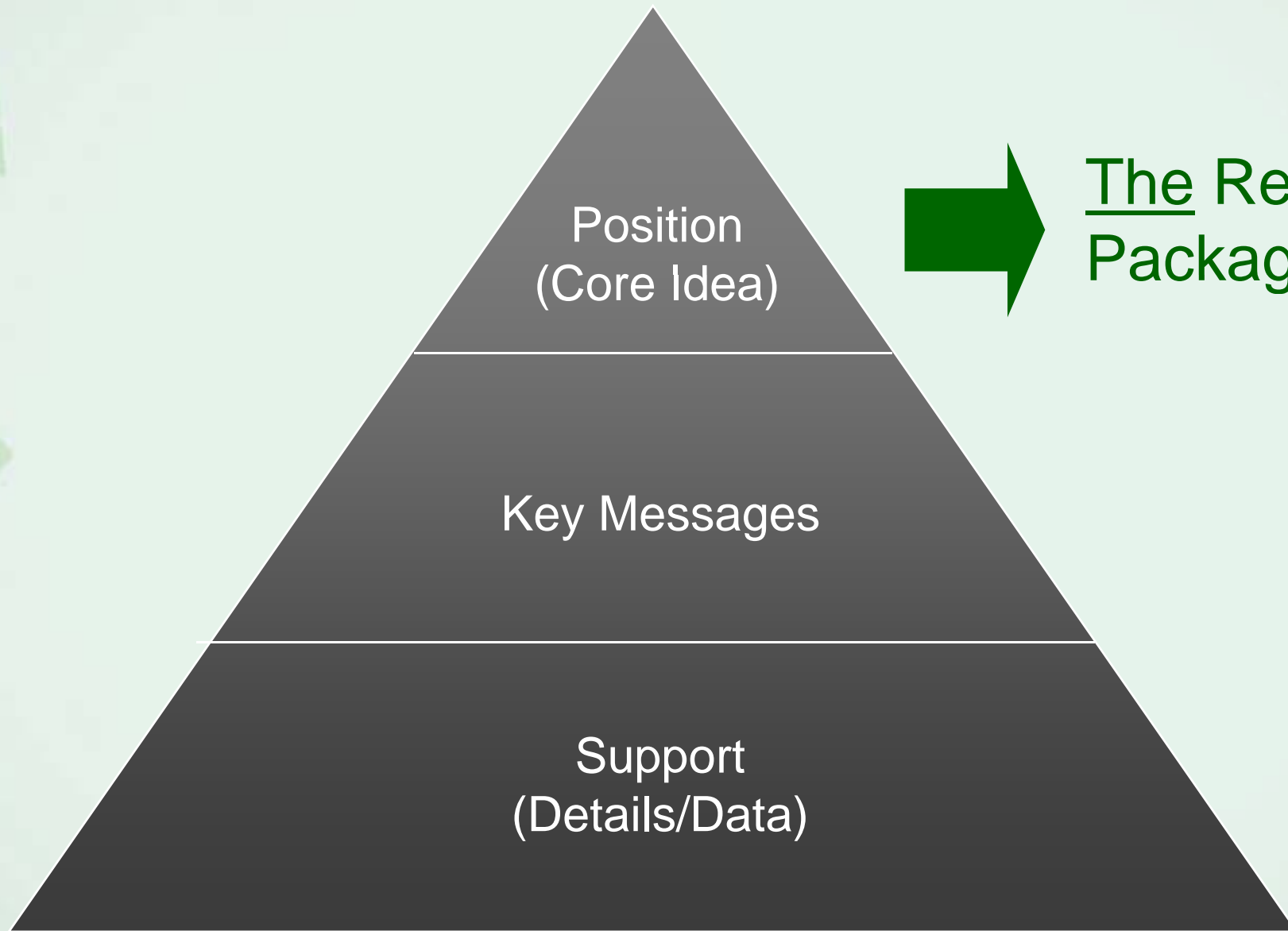
- Science/
Ethics



Relevance

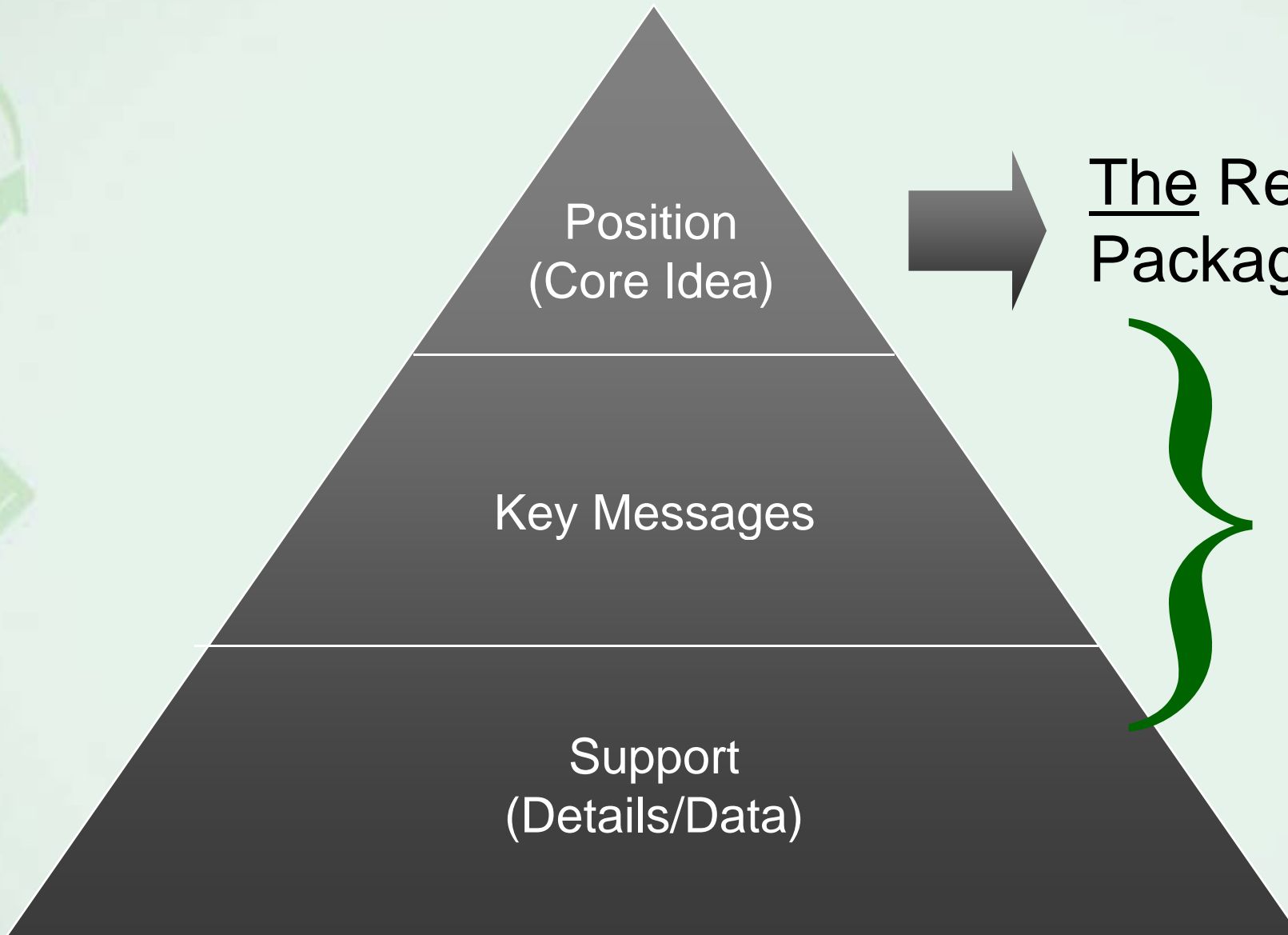
- Emotion

Staking a Claim



The Responsible
Packaging Choice

Staking a Claim



The Responsible
Packaging Choice



Sustainable
Renewable
Recyclable
Reliable
Economic



Inner page

Back

Cover



Inner spread

Inner

The words “Sustain”, “Renew”, and “Ability” would all be embossed on the paper stock, not printed, and when either opened or closed would spell “Renewability” and “Sustainability”.

Responsibility starts here.



Corrugated packaging: Sustainable from the beginning.

2 flaps open

Sustainable
Environmental stewardship starts with simple changes.

Simple changes make the biggest impact. Our industry is a leader in the use of renewable biofuels, with 60 percent of our energy coming from this sustainable source. And we've found that every positive effort can make a difference. As an industry, we've reduced our consumption of fossil fuels by 56 percent between 1972 and 2006, with a 9.2 percent reduction between 2004 and 2006. By using sustainable resources, we're creating a world of change — for the better.

The amount of standing timber in the U.S. has increased by 39% since 1952, and by 10 million acres between 1987 and 2002.

Corrugated Recycles
Corrugated is the packaging material that's recovered and recycled. Corrugated is actually recycled.

Reliable

We can start by thinking ahead.

Plant a seed and watch it grow. The forest products industry plants 2.2 billion new trees each year, growing more than 10 billion additional pounds of wood annually. And through the ongoing sustainability of this resource, innovative crop and forest management, and the use of sustainable forestry practices, we're creating a world of change — for the better.

The carbon stored in our forests in 2005 was enough to offset approximately 40 percent of U.S. household carbon emissions. That's the promising carbon emissions from 18 million cars.

4 flaps

Responsibility
Has always been a smart business plan.

For over a century, we've built a business philosophy dedicated to responsibility — from energy conservation to social management to source reduction. That's what makes us the leaders in sustainable packaging, and what gives us the expertise to help you make the most responsible choices for your business and the environment.

We've also been a leader in recycling solutions in our communities. Taking the time to reduce the environmental impact of every product we make. And through domestic sourcing of raw materials and manufacturing, we're helping to provide jobs and benefits to more than 80,000 employees and their families. These benefits go on to contribute to the economy by purchasing products like yours.

Today, tomorrow and in the years to come, we'll continue to lead the way in creating responsible, sustainable products — so you can feel even better about choosing corrugated packaging for yours.

The amount of standing timber in the U.S. has increased by 39% since 1952, and by 10 million acres between 1987 and 2002.

Corrugated is the single most recycled packaging material. Of the 76.3 percent of recovered corrugated material, 200 percent is actually recycled into new products.

Viable

Economic results can start with green ideas.

Green for the environment — and your bottom line. Corrugated packaging is lightweight, lowering shipping costs while providing maximum product protection. Custom cradle design also can work for both shipping and point-of-sale displays, reducing material use and lowering production costs. Or, using green manufacturing, customers can further reduce the carbon footprint of their products. It's the responsible choice that pays off.

U.S. corrugated manufacturing is a \$24.7 billion industry, contributing to the GDP of America with growth in 2006.

Brochure, opens similar to a box, into a + shape. In our story progresses through pictures and text.

First, reached out to the Communications Committee and the Sustainability Committee.

Second, Packaging & Technology Integrated Solutions LLC (PTIS) Expert Panel[©] members who were involved in 2008 message testing, were qualified for interview and reaction to two brochure designs.

Process

Each participant received two sealed envelopes marked “apple” and “orange” and were provided instructions not to open until prompted.

Shared background

The CPA is interested in producing a brochure that highlights the environmental, social, and economic benefits of corrugated packaging.

Half of the participants were asked to open “apple” envelope first and provided several minutes to review the contents. The other half were asked to open “orange” first.

Participants were asked for their first impression and then asked a series of questions (see Discussion Guide).

Participants were then asked to open the remaining envelope.

Again, participants were asked for their first impression and a series of questions.

Titles Interviewed

- Director of Package and Equipment Development
- Director of Packaging (2)
- Director of Packaging Manufacturing
- Director of Package Development
- Senior Research Associate
- Director of Product Development
- R&D Engineer
- Principle Engineer
- Senior Packaging Engineer (3)

Net: 12 interviews representing a range of titles, demographics, experience and responsibilities across leading brand owners packaging decision makers

Discussion Guide

The CPA is interested in producing a brochure that highlights the environmental, social, and economic benefits of corrugated packaging.”

After opening the first envelope participants were asked

- Was any of this information new to you?
- How would you expect to use this brochure?
- Do you find brochures of this nature helpful when making sourcing decisions? Why or why not?
- How might your opinion have changed about corrugated after viewing this brochure?
- On a scale of 1 to 10, with 1 being not at all effective and 10 being extremely effective, how would you rank the effectiveness of this brochure?

After opening the second envelope participants were asked

- On a scale of 1 to 10, with 1 being not at all effective and 10 being extremely effective, how would you rank the effectiveness of this brochure?
- Now that you have had a chance to see both brochures, which do you perceive to be more useful to you in your current position and why?
- How else might you like to receive this information?



SUSTAIN

CORRUGATED PACKAGING:
THE RESPONSIBLE CHOICE FOR A SUSTAINABLE WORLD.



RESOURCE RENEWABILITY

Real sustainability begins with replenishing what we use today. The forest products industry plants 1.7 million new trees each day, growing more than is harvested annually — ensuring a reliable source of raw materials and the ongoing sustainability of this valuable, renewable crop. And through the Sustainable Forestry Initiative, our industry is using smart forestry principles to meet today's needs without compromising the future of our forests or forest products.



PRODUCT RECYCLABILITY

Making smart, responsible choices means having a vision for the future. That includes the life cycle of your packaging. Corrugated is the most recovered form of packaging, with 78.3 percent of all containers produced being reclaimed for recycling. Of that percentage, nearly 60 percent is used to make new corrugated boxes, minimizing waste and the need for new source materials.

Corrugated is the single most recycled packaging material; of the 78.3 percent of recovered corrugated material, 100 percent is actually recycled into new products.



RESPONSIBILITY

THE RIGHT CHOICE FOR YOUR BUSINESS, YOUR COMMUNITY AND OUR WORLD.

For over a century, we've built a business philosophy dedicated to responsibility — from energy conservation to forest management to source reduction. That's what makes us the leader in sustainable packaging, and what gives us the expertise to help you make the most responsible choices for your business and the environment.

We've also been a leader in recycling initiatives in our communities, "closing the loop" to reduce the environmental impact of every product we make. And through domestic sourcing of raw materials and manufacturing, we're helping to provide jobs and benefits to more than 80,000 employees and their families. These families can in turn contribute to the economy by purchasing products like yours.

Today, tomorrow and in the years to come, we'll continue to lead the way in creating responsible, sustainable products — so you can feel even better about choosing corrugated packaging for yours.

ECONOMIC VIABILITY

Green for the environment — and your bottom line. Corrugated packaging is lightweight, lowering shipping costs while providing maximum product protection. Custom-package designs also can work for both shipping and point-of-sale display, reducing materials use and lowering production costs. All while giving eco-conscious customers another reason to choose your products.



ENVIRONMENTAL SUSTAINABILITY

Simple changes make the biggest impact. Our industry is a leader in the use of renewable biofuels, with 60 percent of our energy coming from this sustainable source. And we've found that every positive effort can make a difference. As an industry, we've reduced our consumption of fossil fuels by 56 percent between 1972 and 2006, with a 9.2 percent reduction between 2004 and 2006. By using sustainable resources, we're creating a world of change — for the better.



RENEW

RENEWABILITY: ADDRESSING THE NEEDS OF THE FUTURE.

Corrugated has always been a smart choice: environmentally responsible, recyclable, biodegradable, cost-effective and versatile. It is the only packaging product that has always used a completely renewable resource for its raw materials. Our trees even offset carbon emissions up to the moment of harvest. That's what makes fiber-based packaging the sustainable, responsible choice for today and tomorrow.

The amount of standing timber in the U.S. has increased by 39 percent since 1952, and by 10 million acres between 1987 and 2002.

ABILITY

EVERY DAY WE RENEW OUR COMMITMENT TO YOU.

The future is in our hands and the corrugated packaging industry is committed to helping customers find responsible packaging solutions — to make products that are both more sustainable and more profitable.



To find out more about how corrugated packaging helps make products more cost-efficient, environmentally sustainable and appealing, visit our Web site at www.corrugated.org.

The carbon stored in our forests in 2005 was enough to offset approximately 44 percent of U.S. industrial carbon emissions. That's like eliminating carbon emissions from 18 million cars.

7

Reliable

We can start by thinking ahead.



Paper is used and recycled to grow. The forest products industry plants 2.7 billion new trees each day, growing new forests to be harvested annually — ensuring a steady source of raw materials and the ongoing sustainability of this valuable, renewable crop. And through the National Forestry Initiative, our industry is using smart forestry practices to meet today's needs without compromising the future of our forests or forest products.



The carbon stored in a tree trunk in 2007 was the equivalent of a flat-top pickup truck's 44-gallon tank of carbon emissions. That's the electricity we can produce from it, at home.

Responsibility

has always been a smart business plan.



For over a century, we built a business philosophy dedicated to responsibility — one strongly centered on forest management to ensure reduction. That's what makes us the leader in sustainable packaging and retail plastic. It's our purpose to help you make the most responsible choice for your business and the world around.



We've also been a leader in recycling. In fact, we're our commitment, "making the loop" to reduce the environmental impact of every product we make. And through careful sourcing of raw materials and manufacturing, we're helping to protect jobs and livelihoods for more than 100,000 employees and their families. These families can in turn contribute to the economy by purchasing products like yours.



Today, tomorrow and in the years to come, we'll continue to lead the way in creating responsible, sustainable products — so you can feel even better about choosing corrugated packaging for yours.



Corrugated is the single most recycled packaging material. Of the 7 & 3 percent of recovered corrugated material, 300 percent is actually recycled into new products.

5

Viable

Economic results can start with green ideas.



Green for the environment — and your bottom line. Corrugated packaging is lightweight, lowering shipping costs while protecting raw materials production. Smart packaging designs also can work for both shipping and point-of-sale display, reducing materials use and lowering production costs. All while giving customers choice, stores another reason to choose your products. It's the responsible choice that pays.



U.S. corrugated cases that weigh 1 to 2.5 lbs are made with 100 percent recycled fiber. The 50% of America's paper is recycled. It's a smart choice.

8

10

Sustainable

Environmental stewardship starts with simple changes.



Simple changes make the biggest impact. Our industry is a leader in the use of renewable fiber, with 80 percent of our energy coming from this sustainable source. And we've found that every positive effort can make a difference. As an industry, we've reduced our consumption of fossil fuels by 56 percent between 2002 and 2006, with a 9.2 percent reduction between 2006 and 2008. By using sustainable resources, we're creating a world of change — for the better.

Renewable

It's the way we've worked from the start.



Let's start from the beginning. A corrugated greenwood is a natural and renewable resource, recycled, biodegradable, carbon-efficient and made by 80 percent of its carbon and energy up to the recent 100 percent. Corrugated is the only packaging product that has always used a core fiber, renewable resource for our raw materials. That's what makes fiber-based packaging the sustainable, responsible choice.



It all starts here. With you.

The future is in our hands and the corrugated packaging industry is committed to helping customers find responsible packaging solutions — from products that are both 100 percent sustainable and 100 percent flat.

To find out more about how corrugated packaging helps, make products more cost-efficient, and environmentally sustainable and appealing, visit our Website at www.ecopackaging.com.

Recyclable

Smart choices today give the future a great start.



Making smart, responsible choices means having a vision for the future. That includes the lifecycle of your packaging. Corrugated is the most recycled form of packaging, with 78.2 percent of all corrugated products being recycled for recycling. Other percentages, nearly 90 percent is used to make new corrugated boxes, reutilizing waste and the need for raw source materials. That's the smart choice for everyone.

4 (flip)

6 (flip)

initial impression?

Apples First

• interesting facts that I would not have known (2)
• Clean and easy to read

• Would like more information on energy used to produce and transport (4)

• Would like to see full lifecycle analysis (3)

• Not cited (3)

• Would like to know why they think they need to do this (2)

• Would like to see how it compares to other materials

• Would like more facts, like forest management, do not jump off the

• Information not current (2002)

• Did not find website address

• Lack of color

• – nothing “pops”

• Not typical of the types of brochures in the industry

• Looks like a “corrugated” brochure

Oranges Second

• Clean and easy to read (3)

• Easier to find when filed (2)

• Looks more professional

• More believable than apple – not so gimmicky

• Flows well

• Big- you can't miss it

• Like that Renew – Ability and Sustain – Ability together

• Some of the points are better highlighted (emissions) and that it is the single most recycled packaging material)

• Read the back – which I did not do with apple

• Very common – not likely to remember (2)

• More likely to get filed away with my everyday “hum” stuff

• Would prefer bullet points to paragraphs

• Reminds me of the Fibre-Box Handbook

• Colors are muted and boring

• Looks dated - makes me wonder if the facts are current

• Feels more wasteful – lots of white space

“Orange” reaction was fairly negative when viewed first. After seeing “Apple” response

initial impression?

Oranges First

Images (2)
Contemporary (2)
Straight-forward
Understand – even for someone who has little experience with
Simple message at a time while keeping you engaged as you

Minds me of a box
Color

Motion (cute kid in a box)
Green – fits the message

With captions are easier to remember than other information.
Points would be easier to read (and more likely to be read) than full
S.

Fact about the material the brochure is printed on (made from

East panel doesn't match the message
I expected a DVD.

Important point (to make products that are both more sustainable
and profitable) is on the back

Looks nice but looks nice once open.

How it can help me be profitable and still be able to tell a green

Why they aren't talking about energy to produce

Highlight energy conservation

REALLY??? Made me think I was going to find a "green washed"

ed

When the flaps are open it gets a little busy

Apples Second

- Easy to read and nicely laid out (2)
- Nice size – reference book that I would keep handy, would not file away
- It's like a fact reference book
- Would be more likely to keep it with me
- Fewer square inches than orange
- Simple and easy to read
- More contained and quicker read than orange
- Hits key points quickly
- Breaks it down one area at a time (recycle, reliable, sustain, etc)
- More contemporary than orange
- Love the graphic images (icons)
- Confused by fact on East panel and Recycling panel sound like the same fact
- Turned off by "Sustainable from the beginning" on cover

Net: "Apple" received many more comments, and far more positive than Orange, regardless of the order presented. This could suggest a s

information new to you?

e

Number of employees (2)
Single most recycled packaging material (2)
Facts on carbon emissions (2)
Facts highlighted on the N,S,E,W panels were new – and impressive.
Of the 78% recovered, 100% is recycled into new products
Leader in the use of renewable bio-fuels
The amount of standing timber
More trees are planted than harvested
Know it's a viable choice – but nice to see it highlighted

Orange

- Numbers on emissions and recycled (3)
- 78% of corrugated is recycled (3)
- No – but very involved with CP

Net: Many more respondents new information from Apple Orange, given only a few minutes to review the materials.

this brochure?

e

Numbers are great to reference
when making our own sustainability
claims (3)

Easy to carry to a meeting if we are
discussing sustainability (2)

Reference to share with marketing
(2)

Would be likely to grab at a
tradeshaw and would save for
reference

Could hang it on my office wall

Would definitely want to share
some of the facts

This document gives me the
confidence to share information
with others

Orange

- Reference (3)
- Would probably file away because of size - might pull for reference if needed.
- Would pass on to our buyers and suppliers
- Would share with sustainability team

Net: Those who viewed Apr first cited far more uses for brochure, including sharing other functions and even int

useful when making sourcing decisions?

Apples First

Yes – but would like to see full life cycle analysis (2)

Yes- but REALLY show me that it's the lowest cost option with the least environmental impact

Yes - Might consider E-flute over paperboard for some applications

No- but it can help me to influence others

No – not enough information

No – my decisions are based on protection requirements of the product

Oranges First

- No – but would share with others who might be influenced (3)
- No – but if argument could be made not to replace with alternative (like tray and shrink wrap) then yes
- No – already feel good about use of corrugated
- No – already know the sustainability benefits of corrugated and use limited by regulations (direct from contact)

Net: Not really seen as a strong influencer to purchase decision
the “YES” responses that Ap

else might you like to receive this information

- Website with up to date information (6)
- CD or DVD (3)
- PDF (2)
- Electronic download or CD

Net: Stakeholders are busy and reference many forms of media for information. Consider the importance of cross-referencing from the printed media to web site, and providing electronic forms of CPA messaging that can be attached to or linked from emails – to be forwarded and shared.

Apples First

Finally – I've been asking for something forever!

This brochure makes me feel more educated and can help me to influence others – gives me the confidence to stand up and share positive benefits of using corrugated material

Speak at schools about careers in packaging and would be a great handout

Facts are not up to date (why are facts ending in 2002?) (3)

Show a different picture on the east panel (3)

Why not print on corrugated?

Oranges First

- Great to see the corrugated industry taking an interest in communicating the benefits
- Don't like picture of the guy throwing boxes (2) – doesn't the message
- Should highlight the economic benefits more

Net: Overall positive reaction
– with a couple of minor changes, i.e. updated facts and replacing one picture appears the Apple design winner for CPA!

Overall, there was a positive response to the idea of communicating the benefits of corrugated material – only 2 out of 12 said they did not understand the need.

Initial reactions are important!

- With the apple brochure – comments about wanting more detail were more common later in the interview and were positioned in a much friendlier manner (e.g., “it would be nice to see...”).

Apple brochure was seen as fun, engaging, modern and cool. Orange brochure was seen as dated, boring, typical, and forgettable.

Respondents were much more specific about the facts that were new to them with the Apple brochure – challenged to cite the new facts with Orange.

More Apple respondents said they would be likely to share the brochure with others, while Orange respondents were likely to file the brochure away and use it out as reference.

Summary (continued)

- While more respondents said that their opinion of corrugated was better (or slightly better) after viewing orange then apple, none of these respondents would influence their sourcing decisions, or that it would result in the use of corrugated.
- Half of the apple first respondents said it would influence their decisions if a more information were available to them (even on a website).
- Many were impressed with the facts (actual numbers) and felt they should see out more – that some of the facts are “lost” in the text.
- 10 of 12 respondents felt the Apple version would be more beneficial to them than their current position.
- On a scale of 1 to 10 (with 10 being most effective) the Apple version ranked slightly higher (7.1) than the orange version (6.2) in overall effectiveness. Overall, Orange received far more scores of 6 and under than Apple.
- Most respondents said that it would be beneficial to have an electronic version as well that they could use during presentations (or incorporate into presentations).
- The Apple design appears a clear winner for CPA – a couple of minor suggested changes could help eliminate negatives and improve reaction slightly.

Next Steps

- Refinement based on feedback; particular focus on the copy
- Finalizing the brochure as the first in a family of materials



Responsibility Starts Here





Life Cycle Assessment of U.S. Industry Average Corrugated Containers



Prepared for:
Corrugated Packaging Alliance
*a joint initiative of the
American Forestry & Paper Association
and the Fibre Box Association*



Prepared by:
PE-Americas
and Five Winds International

March 26, 2009

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Next Steps

- Refinement based on feedback; particular focus on the copy
- Finalize the brochure as the first in a family of materials
- Launch the new industry-wide, corrugated packaging messages
- New messages and sales materials available in the coming weeks