

THE EDGE

Newsletter of the Paper Manufacturers
Association of South Africa

January 2024

A message from the Executive Director

We often get asked what the Paper Manufacturers Association of South Africa (PAMSA) does. It is not an easy question to answer succinctly. In October 2023, we spent time as a team reflecting on what PAMSA is and what services we offer our industry. Our facilitator, Steve Harris, helped us to think differently about PAMSA not only as a unit, but also the role that every person plays in the team.

PAMSA represents more than paper. It represents the trees, wood, fibre, and pulp that makes paper; it also looks after the paperboard and tissue sectors of South Africa too, and it seeks to advance research of by-products of the pulp and paper-making process – what is often referred to as the circular bioeconomy. PAMSA also serves this thriving value chain by supporting a myriad of education, training, and talent development needs.

We leverage funding from the Fibre Processing and Manufacturing Seta (FP&M Seta) for skills, education and training programmes, keep close to our government colleagues and connect with universities through our Master of Engineering bursary and research programme and other academic partnerships.

Then there is the environment – from commenting on countless pieces of legislation to promoting the positive environmental story that is the forest and forest product sector.

PAMSA is often called on to share how the sector contributes to the local economy – both in terms of rands and cents but also in the form of employment not only in our own industry but in sectors that rely on our goods.

In essence, PAMSA exists to ensure that our sector prospers, from farming trees for woodfibre to recycling paper – and everything in between. Apart from promoting the value that the industry adds to the environment, society, and the economy, we ensure that the sector's voice is heard through our promotional and public relations efforts. We do all this with a small core team but rely heavily on our members and relationships with fellow associations.

If you would like to find out more about what we do, take a look [here](#).

I wish to take this opportunity to thank my small team for their passion, dedication, and commitment. To our members and stakeholders, thank you for your support. May 2024 bring wonderful things for our sector and our country.

Jane Molony



Connecting with our members, understanding their needs

Several members of the PAMSA team spent time last year visiting member operations. Commenting on the value of this exercise, Olga Bezuidenhout, education, recycling and stakeholder relations manager, said, "Our team met with various member representatives at their respective operations to reinstate in-person interactions.

"We gained invaluable insight from these conversations, sharing our strategies to determine if they are aligned with member needs while also learning about member initiatives and challenges."

A few common threads emerged from these engagements:

- Environmental related challenges with regards to legislation.
- Road, rail and export logistics infrastructure
- Electricity and water supply disruptions
- Quality of students due to inadequate competency especially in mathematics and science.

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In an effort to address the latter, PAMSA launched several initiatives in 2022 and 2023. The team compiled a list of schools within 15km of member mills, and by the end of the year, they had engaged with 35 schools and more than 2,000 students.

Ahd Lajabu and Tharif Hanif visited a number of these schools to raise awareness of the industry, the value it adds to everyday life and more importantly, the study and career opportunities on offer.

"It was also important to emphasise the need for good mathematics and science skills. While the nationally required pass mark is very low, this is not sufficient. We encourage students to strive for a pass mark of 50% to improve their chances of getting a job in a technical field," noted Olga.

During these engagements, learners were introduced to member companies and their employment offerings. Member representatives were also invited to accompany the team on these school visits.

"We want to explore potential partnerships with the schools in the region and meet their needs in terms of talent attraction," added Olga.

TUTORING SUPPORT

In addition, PAMSA offers face-to-face and online tutoring in maths and science to industry employees and students who are studying through its academic partners, namely DUT, UNISA, Ekurhuleni East TVET college (KwaThema) and Umfolozi College (Mandeni campus).

SHORT COURSES

PAMSA has created several short courses available to employees who wish to know more about the sector.

- Introduction to Pulp and Papermaking
- Basic Refining
- Water and Effluent
- Wet End Chemistry
- Sustainable Production and Consumption

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WOW! There's a career in the forest products industry for me?

In August 2023, the World of Work (WOW) 2023 Career Fair was an insightful two-day event organised and hosted by the Durban University of Technology (DUT). Students came in numbers to engage face-to-face with companies and to get additional information about job possibilities, bursaries, and internships in the pulp and paper industry.

PAMSA was invited to showcase the industry by sharing the courses and opportunities offered to young people. "It was great to talk to the students and hear their thoughts about the paper industry and answer their questions," says Nasreen Ally, project administrator at PAMSA.



On 18 October 2023, our team participated in the Sappi Stanger mill career day.

A busy year of webinars, a roundtable and a little thing called COP28

If there is one thing that Covid taught us, it was that we could learn and exchange views without even leaving our desks. PAMSA hosted several webinars during 2023; some were in partnership with the Department of Trade, Industry and Competition as well as four sessions on carbon reporting. Click on the dates below to access the recordings.

Webinars

- **22 May** - Access to Incentives & Funding for the forestry, pulp and paper sector
- **20 July** - Introduction to Carbon Reporting and Carbon Tax for Forestry and Forest Products
- **14 August** - Paper Packaging Insights trends and myths (in partnership with Woolworths and the Institute of Packaging)
- **19 September** - Calculating carbon sequestration and GHG emissions using the Monitoring, Reporting and Verification tool
- **28 September** - Calculating carbon sequestration and GHG emissions using value based platform
- **5 October** - Unpacking the Africa Continental Free Trade Agreement for Timber Processing, Pulp & Paper Sector



From left, Dr Nelson Sefara, Jane Molony, Don MacFarlane, Nelly Ndlovu, Tim Neary, Dr Tracy Wessels, Dr Valeska Cloete and Gugu Mhlungu.

Roundtable unearths the sector's role in greener products

The trend to encourage consumers to go paperless may not be doing the good many think it is doing was the clear message from a roundtable discussion hosted on 5 July 2023.

Experts at the roundtable said the perception that reducing paper consumption would save the environment is unsubstantiated and misleading.

Tackling various issues from growing trees to trends in paper packaging, the discussion was chaired by award-winning author and Talk Radio 702 presenter Gugu Mhlungu, and featured representatives of Sappi Southern Africa, Mondi Zimele, Mpact, and Woolworths.

The **first session** covered the environmental and socio-economic aspects of forests and wood products. Dr Tracy Wessels, group head of sustainability and investor relations at Sappi, Nelly Ndlovu, general manager of Mondi Zimele and conservationist and head of Outdoor Escapes Tim Neary were explicit about the importance of our planted forests and debunked several myths and misunderstandings about the sector.

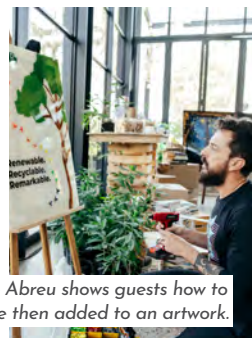
"Sustainability is a lot more than just the environment. There is also a social and people element to it, and sustainable forestry management plugs into this very well," said Ndlovu.

The **second discussion** focused on packaging trends, the circular economy and innovation and developments in packaging substitution and recycling. Guests were treated to the insights of Don MacFarlane, packaging senior at Woolworths, Dr Valeska Cloete, group innovation, research and development manager at Mpact, and Dr Nelson Sefara, Sappi Technology centre manager.

Along with tucking into popcorn, chocolate, and coffee in paper packaging, attendees tapped into their creative sides with South Africa's own local Guinness Book of Records holder and origami artist Juanne-Pierre De Abreu. De Abreu, who currently holds the record for the largest display of origami butterflies at 29,416, showed guests how to fold square pieces of paper into butterflies.



Origami artist Juanne-Pierre De Abreu shows guests how to fold paper butterflies which were then added to an artwork.



PAMSA hosts COP28 side event on biodiversity

On Saturday 9 December, PAMSA, along with the National Business Initiative, hosted a side event at the South African pavilion. The session, facilitated by Ross Hampton, executive director of International Sustainable Forest Coalition sought to showcase how the plantation forestry sector uses nature-based solutions (also termed ecosystems-based approaches) to mitigate biodiversity loss and climate change.

Minister Barbara Dallas Creecy, South African Minister of Forestry, Fisheries and Environment, opened the session by sharing how South Africa plans to domesticate the Kunming-Montreal Global Biodiversity Framework. "It was a great opportunity to engage with the Minister in-person and reiterate the importance of forestry for both the environment and the rural economy, especially small timber growers," says Jane Molony. The Minister's formal speech is available [here](#), with an access to the session recording [here](#).

The global forest and forest product sector understands the interdependencies of the people, planet, prosperity. The speakers also asserted how a sustainable forest-based bioeconomy and biodiversity, climate change and socio-economic development can be held in balance. Sharing their country's perspectives and success stories were:

- **Jane Molony (PAMSA)**
 - Beyond the trees - how sustainable forestry and biodiversity stewardship can support South Africa's triple bottom line
- **Ambassador Jose Carlos (Ibá, Brazil)**
 - Nature-based solutions - connections between biodiversity and climate in the forest-based sector
- **Dr Elizabeth Heeg (Forest Owners Association, New Zealand)**
 - Nature-based solutions in New Zealand Forestry - the foundation of the bioeconomy



Minister Barbara Creecy



From left, Ross Hampton, Jane Molony, Dr Elizabeth Heeg and Ambassador Jose Carlos at the South African Pavillion at COP28

Photo: Mondi South Africa

PAMSA presents SA forest and forest product perspective at the WTO

In September, Jane Molony represented PAMSA and the greater South African forest sector at the World Trade Organisation (WTO) in Geneva for a discussion on Global Environmental Challenges & Inclusive Solutions with specific focus on Sustainable Forest Management (SFM) and National Experience Sharing from three countries - India, Indonesia and South Africa.

Jane was part of a panel with representatives from India and Indonesia, respectively Aashish Chandorkar, a Counsellor at Permanent Mission of South Africa to the WTO, and Dr Riza Noer Arfani, Director of Centre for World Trade Studies, Universitas Gadjah Mada (UGM) and Chair-holder of the WTO Chairs Programme.

"Healthy forests are instrumental in addressing some of the most pressing issues of the day: slowing climate change and the loss of biodiversity, advancing social equity and providing sustainable and renewable resources.

SFM can therefore serve as a backbone for resilience, stimulating cross-border and cross-sectoral collaboration," said moderator Kekeletso Mashigo, Counsellor at the Permanent Mission of South Africa to the WTO, in her opening remarks.

Responding to the question 'Can you offer any solutions in the current climate of regulatory barriers to business as usual?', Jane said, "Dialogue is essential. Unilateral decisions, no matter how well intended, have dire consequences for African trade. Fortunately, on the forestry front, South Africa is in a better position than many, thanks to excellent SFM systems."

In conjunction with PAMSA, the Sustainable African Forest Assurance Scheme (SAFAS), which is endorsed by PEFC,

developed a framework known as the Value Base Platform that small landowners can use to assist in all manner of reporting requirements.

It can track both emissions and carbon stored plus it gives an idea of biodiversity impacts. This plus company SFM systems ensure that compliance with EU Deforestation free regulations is possible.

"By making tools such as monitoring, reporting and verification more accessible to small timber growers, we invest in the rural economies that keep global supply chains trading."

She touched on the African Continental Free Trade Agreement and its objective to boost trade across the continent as being part of the solution adding "While there are several mechanisms in place, policies for developing countries need to be appropriate and not inhibit trade."

Jane shared the words of UNCTAD secretary-general Rebeca Grynspan: "This is Africa's moment to bolster its position in global supply chains, strengthen its emerging industries and create millions of jobs."

Sharing the highlights of the session, Ms Mashigo said: "Legislation alone will be insufficient to preserve forest integrity if all affected policies, including trade policy, do not promote local ownership, participation and local sustainable development."

The insights shared today from the developing world are very important and need to be heard, and I hope that the issues raised today become an integral part of the decision making taken by the developed economies when designing their trade and environment measures," concluded Ms Mashigo.

Photo: Sappi Southern Africa

Two Sides Trend Tracker survey yields a mixed bag of results



PAMSA enrolled South Africa as one of the 16 countries participating in the 2023 global 'Trend Tracker Survey'. This meant that South African consumers' views on environmental perceptions, preferences and attitudes towards print, paper and paper-based packaging have been included for the first time in the biennial consumer research study, driven by Two Sides.

The survey seeks to understand consumer perceptions towards print and paper products, looking specifically at environmental awareness, reading habits, and packaging preferences. More than 10,000 consumers took part.

"The results highlight the importance of the sector working together to tell the good story about forestry, paper and print," says Jane Molony. "We also need to challenge the myths when we see them."

Here is a snapshot of the releases we issued. You can find more detail by clicking on the respective links. **Paper industry suffers from an environmental perception conundrum**

Consumers continue to believe electronic communication is more sustainable, with 49% agreeing that the Internet or "cloud" does not have a big environmental footprint, and 77% say that electronic communication is more environmentally friendly.

The truth, however, is that paper and print products are among the lowest greenhouse gas (GHG) emitters at 0.8% whereas the ICT industry accounts for more than 2% of global greenhouse gas emissions (as much as all air traffic). If left unchecked, the ICT footprint could increase to 14% of global emissions by 2040. [Read more](#)

SA consumers confused about the impact of paper on forests

The results revealed that many people are still confused about the difference between farmed wood for papermaking, and deforestation. While 71% of South African consumers agree that it is important to use paper products from sustainably managed forests, and 36% pay attention to forestry certification labels when purchasing paper-based products, the perceptions persist that a paperless environment is ecologically friendly.

Some 35% of consumers believed that electronic devices were the most environmentally friendly, yet wood ranked second and paper ranked fourth. On the one hand, 77% of people feel that electronic communication is better than paper-based media; on the other, 76% acknowledge that planted forests are not bad for the environment - a clear contradiction. [Read more](#)

Reading habits, news and marketing

Despite the surge in online media use, many consumers still value print on paper, especially when reading books and magazines. The survey showed that 49% of South African consumers prefer to read printed books and magazines. Around 44% prefer to read news on their computer or device. This concurred with our own survey that we conducted in 2022, in which 65% of respondents preferred paper over digital when reading for leisure. Just less than 25% still get their daily news from newspapers only, while 33% of the participants said they rely on a combination of newspapers and news websites. [Read more](#)

SA consumers prefer paper packaging and want more packaging return programmes

The shift to online shopping has accelerated dramatically in recent years. At the touch of a screen, consumers can search for a product, order and have it delivered to their door, on the same day. Consumers have come to appreciate the safety, speed and convenience of buying products online, however many are increasingly concerned about how their goods are packaged and delivered, and how easy it is to recycle materials used. [Read more](#)

Consumers and businesses can do more

62% of respondents said they recycle paper and paper packaging at home, and 78% understand the types of products that need to go into the recycling bin. Just less than 70% of South African consumers surveyed believe that only recycled paper should be used - from printing to packaging to tissue products.

"We have to squash this myth that recycling paper saves trees or that paper is bad for the environment," says Jane. "Many people don't realise that paper fibres are not infinitely recyclable as they shorten after each "recycle" and do not bond well to make new paper. Fresh virgin fibre from sustainably farmed wood will be added to strengthen the pulp recipes."

Recycling is just one branch of paper's circularity. From the farming of 850 million trees on 676,000 hectares for pulp and papermaking to the beneficiation of process "waste" into lignosulphonates and biochemicals, our industry is very much a circular economy. [Read more](#)

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49% of South African consumers prefer to read printed books and magazines.

Insights from the packaging section of the survey:

- 77% of South African respondents would actively support retailers who offer a packaging return system.
- Paper/cardboard scored the highest in 10 of 15 attributes when compared with other materials.
- 58% prefer paper packaging for online orders.
- 60% would buy more from retailers who remove plastic from their packaging.

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"We have to squash this myth that recycling paper saves trees, or that paper is bad for the environment."

Jane Molony

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PLAY YOUR PART IN SHARING THE GOOD STORY

1. **Remove email footers** such as "Consider the environment before you print". Instead, use something like "Paper is made from sustainably farmed trees. If you print this, please recycle it."
2. **Take a look at our video** and share it!
3. **Follow us on social media** and share our posts: Facebook, Instagram and X as @paperrocksa, and on LinkedIn.



Two Sides Packaging Webinar

15 February 2024

Sustainability of paper packaging

- European Packaging Market Overview - Neil Osment, NOA
- PPWR update - Eleni Despotou, FEFCO
- The Power of Digital Print - Tony Lock, HP
- Moulded Fibre Pulp Packaging - Karl Axnäs, Stora Enso
- Recycled Solid Board - Jesse Rep, Solidus
- Burgopak Design Innovation - Dane Whitehurst, Burgopak
- Absolut Paper Bottle Development - Elin Furelid, Pernod Ricard
- IKEA's Packaging Strategy - Maja Kjellberg, IKEA

Time: 11:25 - 15:00 (09:25-13:00 GMT)

Registration

SADC Industrialisation Forum

26 - 27 February 2024

Investing in People and Unlocking Potentials in Southern Africa

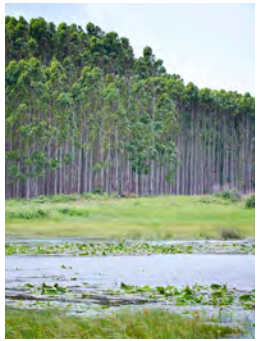
Institutional investors, commercial banks, DFIs, think tanks, academia and more are invited to provide insights that focus on reforms, macroeconomic stability and predictability to fully unleash the region's economic potential.

Sandton Hotel, Benmore Road, Benmore Gardens, Sandton, South Africa

Time: 08:00 - 17:00

Registration

DAYS TO REMEMBER



- 2 February - World Wetlands Day
- 11 February - International Day of Women and Girls in Science
- 3 March - World Wildlife Day
- 8 March - International Women's Day
- 18 March - Global Recycling Day
- 21 March - Human Rights / International Day of Forests
- 7 March - World Book Day
- 22 March - World Water Day
- 22 April - Earth Day
- 23 April - World Book and Copyright Day

Watch our video



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PAPER

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