The Financial Impact of Greenwash on the Paper, Print and Mailing Industry

United Kingdom

Greenwashing is a serious danger for our industry which, if left unchallenged, threatens the loss of £22.4 million of value annually for the paper, print and mailing industry in the UK, (€337 million in Europe*).

Two Sides has been actively engaging with organisations found to be making misleading and unsupported environmental claims against print and paper for over 10 years. Our Anti-Greenwash campaign has successfully challenged over 750 global organisations, primarily service providers like banks, utilities and telecoms, that subject their customers to repeated Greenwashing messages which are damaging to our industry.

It remains vital that Greenwash is challenged to ensure that the industry's great environmental record is recognised and that the livelihoods of thousands of industry employees, as well as print, paper and postage volumes, are not damaged by the spread of misleading and opportunistic Greenwash marketing.

What is Greenwashing?

For those unfamiliar with the term, Greenwash is defined as **"Behaviour or activities that make people believe that a company is doing more to protect the environment than it really is"**, (Cambridge Dictionary).

Examples of misleading statements:

- Go paperless, save trees and help save the planet.
- Move to digital bills and statements and protect the environment.
- Go green, go paperless.

These statements are often made as part of cost saving initiatives and typically ignore the environmental impact of digital communications. In most countries such statements, made without research and evidence, go against national advertising standards.

If left unchallenged, Greenwashing threatens the loss of £22.4 million of value to the print, paper and mailing industry in the UK. (€337 million in Europe)



Measuring the financial impact of Greenwash

Greenwashing reaches millions of consumers each year. It has been recognised that the success of the Two Sides anti-Greenwash campaign cannot just be measured by the number of organisations that have removed misleading environmental claims from their communications but, also, by better understanding the financial damage to the industry arising from Greenwashing.

A research project was conducted at the beginning of 2021, in partnership with consumer research organisation Censuswide, which examined:

- The reach and impact of Greenwashing on consumer behaviour.
- The financial impact upon the paper, print and mailing industry as a result of Greenwashing.
- The volume and value of preserved print, paper and postage as a result of the Two Sides Anti-Greenwash campaign.
- The potential for further preservation of volumes and value if the current Two Sides success rate to stop Greenwash is improved and extended to more countries.

Greenwash poses a significant threat to an industry that employs in the UK, 116,000 people (1,096,000 EU), in more than 8,400 businesses (115,700 EU).

If you come across any instances of Greenwash, please report them to Greenwash@twosides.info

Print, Paper and Paper Packaging have a great environmental story to tell

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Consumer opinion of Greenwashing

Organisations that Greenwash take the risk of harming their reputation with consumers.

Censuswide research shows that consumers understand that organisations who use Greenwash want to save costs by switching to cheaper digital bills and statements (67% UK, 66% European). Furthermore, whether a consumer has seen Greenwash or not, they do not want to be forced to switch to digital bills and statements (40% UK, 52% European).

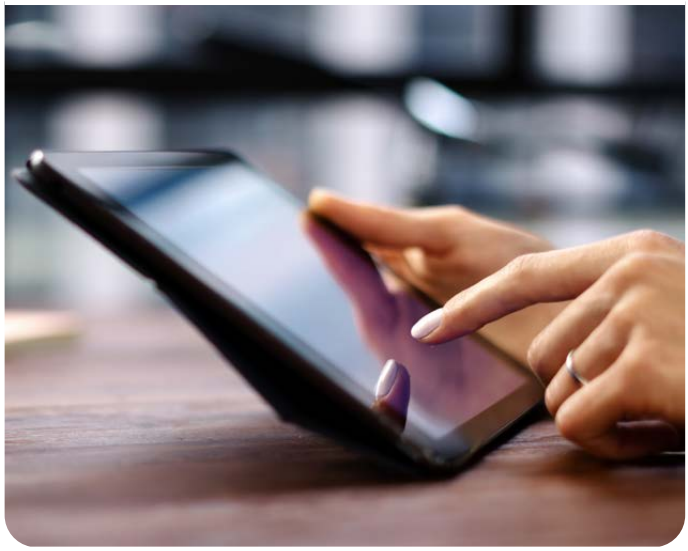
It was also found that 26% of UK consumers (29% European) are concerned about suppliers using environmental arguments and think they are unnecessary. Whilst, 38% of UK consumers (44% European) disbelieve environmental messaging about moving to digital communications.

Earlier research by Two Sides found that consumers also overwhelmingly want the right to choose how they receive communications (digitally or printed) from organisations. 76% of UK consumers and 74% of Europeans want this choice (Two Sides/Toluna, 2021).

67% **of UK consumers believe providers moving to digital communications is about reducing cost (66% of Europeans)**

76% **of UK consumers believe they have the right to choose paper or digital communications (74% of Europeans)**

The campaign stops Greenwash messages being seen over 209 million times in the UK each year.



76% of UK consumers and 74% of Europeans want the right to choose how they receive their communications (digitally or printed) from organisations.



Research results

Consumers are encouraged to switch to digital bills and statements if they are subjected to Greenwash.

Currently, it is estimated that 41% of UK and 44% of European consumers' bills and statements are received on paper in the post.

Two Sides examined the intention of consumers to switch from paper to digital bills and statements and found that 58% of UK and 62% of European consumers say that they are encouraged to switch from paper to digital bills and statements after seeing Greenwash.

Millions of UK and European consumers are not being subjected to Greenwash as a result of the Two Sides Greenwash campaign

- 170 UK and 448 European service providers have removed Greenwashing as a result of Two Sides engagement. (July 2021)
- The campaign has stopped, and continues to stop, Greenwashing statements being seen over 209 million times each year in the UK and 590 million times in Europe; preventing millions of consumers from being misled about the environmental impact of print and paper.

448 **European service providers have removed Greenwash**

The financial impact of removing Greenwash

In the UK the campaign has:

- Preserved £11.2 million of value annually of paper, print and postage.
- Stops Greenwash messages being seen over 209 million times each year.

Preserving annually:

- Value of paper: £330,000.
- Value of print: £1.3 million.
- Value of postage: £9.6 million.
- A total paper, print and mail value of £11.2 million.

In Europe*, the campaign has:

- Preserved €44.7 million of value annually of paper, print and postage.
- Stops Greenwash messages being seen over 590 million times each year.

Preserving annually:

- Value of paper: €1.26 million.
- Value of print: €5.1 million.
- Value of postage: €38.4 million.
- A total paper, print and mail value of €44.7 million.

Whilst the Two Sides Greenwash campaign operates throughout Europe, the research was confined to the UK, France, Germany and the Nordics, (Norway, Sweden, Finland, Denmark).

£11.2 million — **UK total value of paper, print and mail preserved annually**

€44.7 million — **European total value of paper, print and mail preserved annually**

The risk of Greenwash and opportunity for the industry

Without challenge, Greenwash remains a significant danger to the reputation of the print and paper industry and a threat to the volumes and value of the sustainable products produced.

Two Sides receives new Greenwash cases every day, and this trend looks set to continue as more organisations pursue a switch away from paper to digital bills and statements in order to save costs. The Anti-Greenwash campaign is growing, with a Greenwash removal success rate of 67% in the UK and 49% in the European countries where the campaign is active.

Total volume and value of print, paper and postage at risk from Greenwashing annually

From the research conducted, it is possible to project the total impact of Greenwashing across Europe and the risk this creates.

UK		Europe
£660,000	Value of paper at risk	€9.4 million
£2.6 million	Value of print at risk	€37.6 million
£19.1 million	Value of postage at risk	€290 million
£22.4 million	Total value of paper, print and mail at risk	€337 million

What must Two Sides and the industry do

As of July 2021, Two Sides has successfully challenged over 750 global organisations found to be making misleading and unsupported environment claims about paper and printed communications.

Wherever Greenwashing is discovered, it must be challenged as it poses a significant threat to an industry that employs in the UK, 116,000 people (1,096,000 EU), in more than 8,400 businesses (115,700 EU).

Two Sides actively engages organisations found to be Greenwashing. By starting a productive dialogue with these businesses, Two Sides can explain the great sustainable story of paper. How, far from "saving trees", by moving to digital as claimed by greenwashers, a healthy market for forest products, such as paper, encourages the long-term growth of forests through sustainable forest management. And, thanks to Europe's record-breaking paper recycling rate (74%), discarded paper should not be seen as waste, but rather as an essential material for the new circular economy.

Two Sides also proactively engages organisations and associations on the positive facts about print, paper and paper packaging.

We have produced tools and resources to help explain the sustainable nature of our products and industry including our popular Myths and Facts booklet, covering the 8 key myths about paper, and a series of Fact Sheets including one specifically on Greenwashing, **"Go Green, Go Paperless" messages are misleading.**

If you come across any instances of Greenwash, please report them to: Greenwash@twosides.info

Fact Sheets



Myths & Facts Booklet



Support Two Sides

We invite all organisations operating in the print, paper and paper packaging industries to actively support Two Sides by becoming a member: www.twosides.info/become-a-member/

*Europe: France, Germany, Norway, Sweden, Finland, Denmark, and UK

About Two Sides

Founded in 2008, Two Sides is a not-for-profit, global initiative promoting the unique sustainable and attractive attributes of print, paper and paper packaging.

The Two Sides campaign is a collaboration of companies from sectors including forestry, pulp and paper manufacturing, inks, pre-press, press, finishing, publishing, printing, envelopes and postal operators.

Two Sides operates throughout Europe, North America, South America, South Africa, Australia and New Zealand.

Since 2010, the Two Sides campaign has changed or removed misleading environmental claims of over 700 organisations, including many of the world's largest corporations.

For more information visit **www.twosides.info**

+44 (0)1327 262920
enquiries@twosides.info
@TwoSidesUK
www.twosides.info
/company/TwoSidesUK
@TwoSidesUK

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