



AUSTRALIAN **PUBLISHERS** ASSOCIATION

Australian Publishing Industry Sustainability Survey 2023

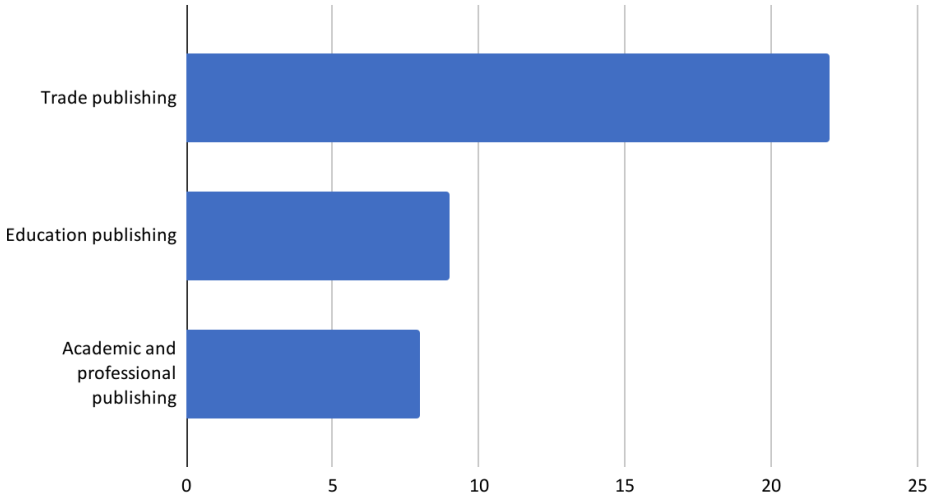
Introduction

In September 2023, the Australian Publishers Association invited members to undertake a survey to better understand how publishers are addressing sustainability in their organisations, and where support may be needed. Industry sustainability surveys are underway in Europe and the UK, and the Australian industry responses will help us benchmark local engagement with sustainability against international counterparts.

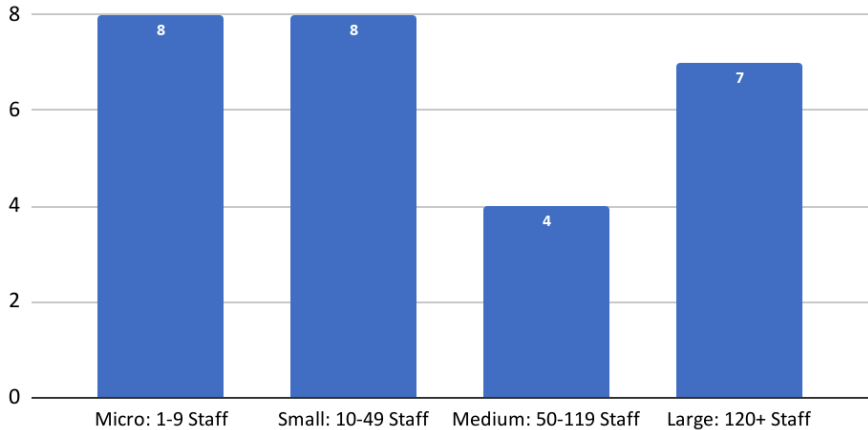
Twenty-seven publishers responded to the survey, from large multinationals reporting on their Australian operations to micro publishers with fewer than 10 staff, spanning trade, education, and academic and professional publishing.

The graphs below show the make-up of respondents by publishing sector – noting that some publishers who responded work in multiple sectors – and by size.

Respondents by publishing sector



Respondents by size

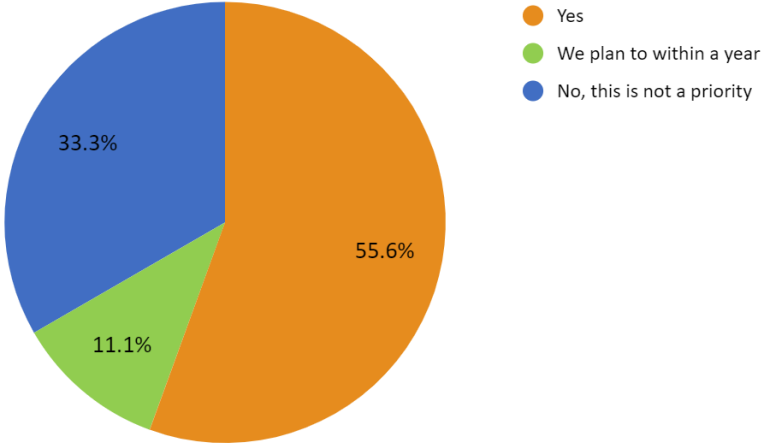


Policies, targets and reporting

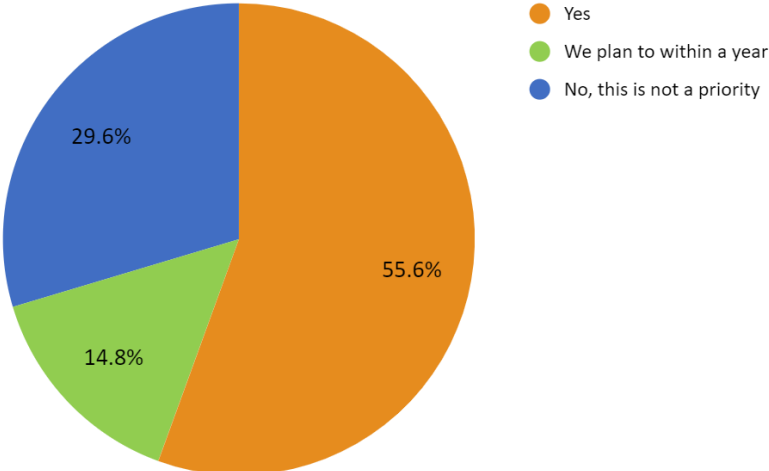
The survey invited publishers to share their environmental policies, targets and methods of reporting. Over half (56%) of the respondents have a person or team with direct responsibility for their company’s sustainability agenda, while a further 11% plan to establish a person or team within a year. One third (33%) of respondents said this is not a priority. Allocating responsibility for sustainability to a person or a team is an indicator of organisational commitment.

Similarly, over half (56%) of the respondents have a written environmental policy or statement, while a further 15% plan to release one within a year. For less than a third (30%), this is not a priority.

Does your organisation have a person or team with direct responsibility for sustainability?



Does your organisation have a written environmental policy or statement?

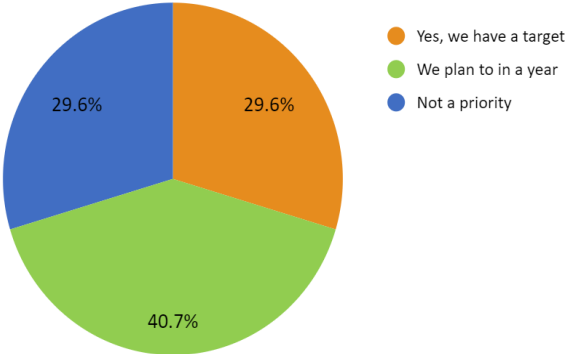


Publishers were asked to share their sustainability commitments. Fewer than a quarter (22%) of respondents have signed up to the [UN Sustainable Development Goals](#), with just one signatory each for [ISO 14001](#) and the [Carbon Disclosure Project](#).

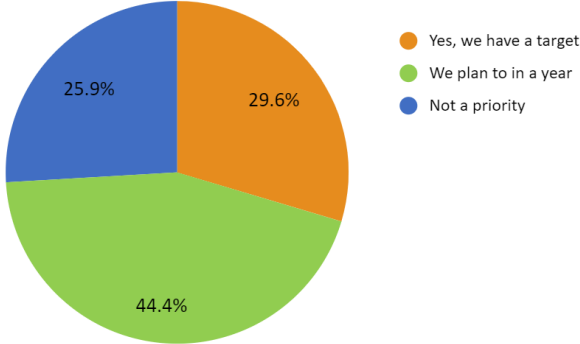
The survey also explored publishers' sustainability targets for Energy, Waste, Plastic and Recycling. Over a quarter of respondents have targets in these areas, ranging from 26% for Plastic and Waste targets to 30% for Energy and Recycling targets. This looks set to grow in the next 12 months, with over 40% of respondents reporting that they plan to set targets within a year.

However, over a quarter of respondents in all four areas said that targets were 'not a priority'.

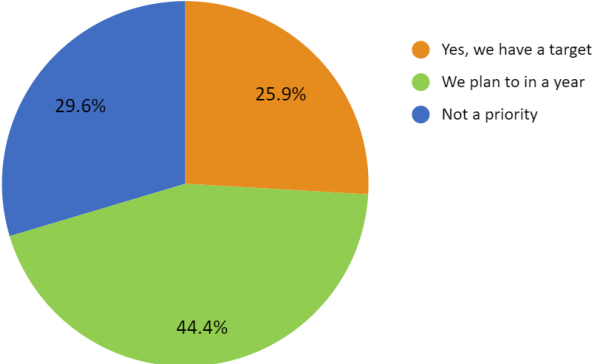
Has your organisation set any energy targets?



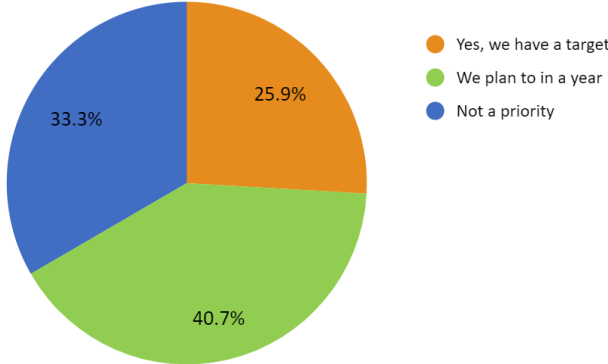
Has your organisation set any recycling targets?



Has your organisation set any waste targets?

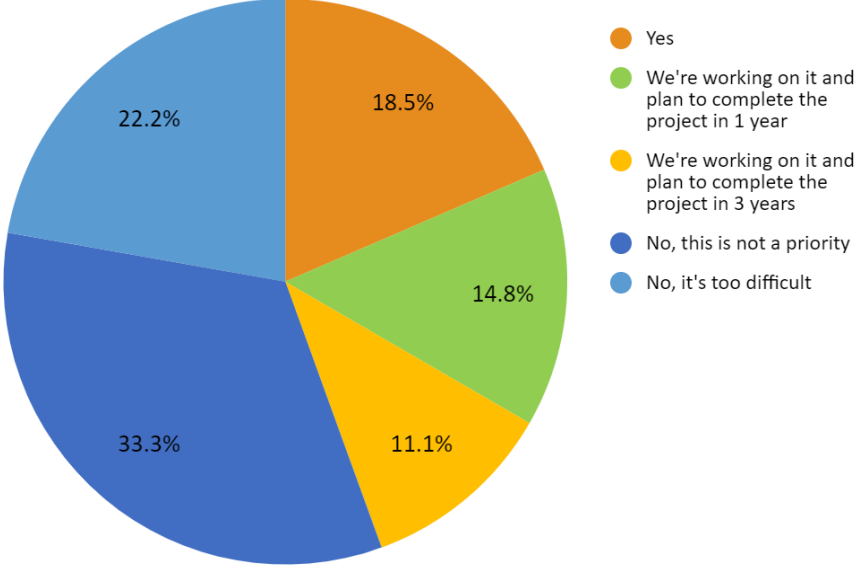


Has your organisation set any plastic targets?

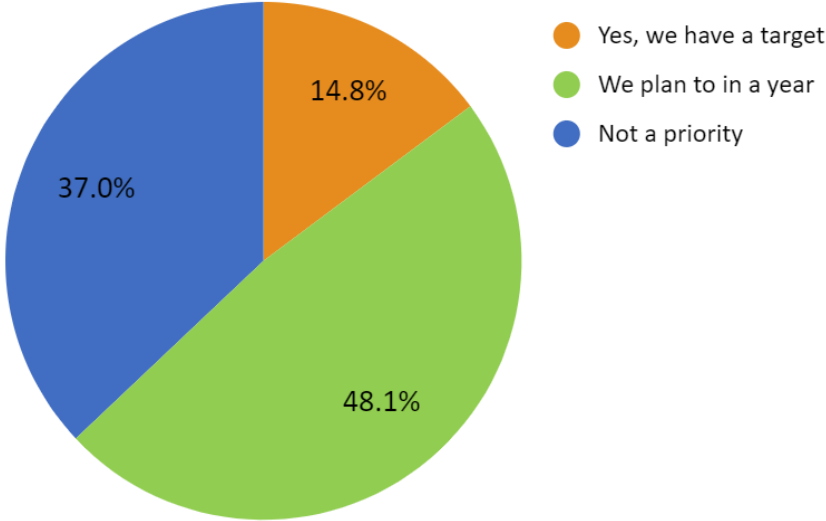


Unsurprisingly, given the complexity of the process, only 19% of respondents are currently calculating carbon emission for their Australian operations. Twenty-six percent plan to calculate carbon emissions in the next one to three years, but over half (55%, predominantly micro and small publishers) said it was 'too difficult' or 'not a priority'. Fifteen percent have set emissions targets to track their progress.

Has your organisation calculated its carbon emissions?

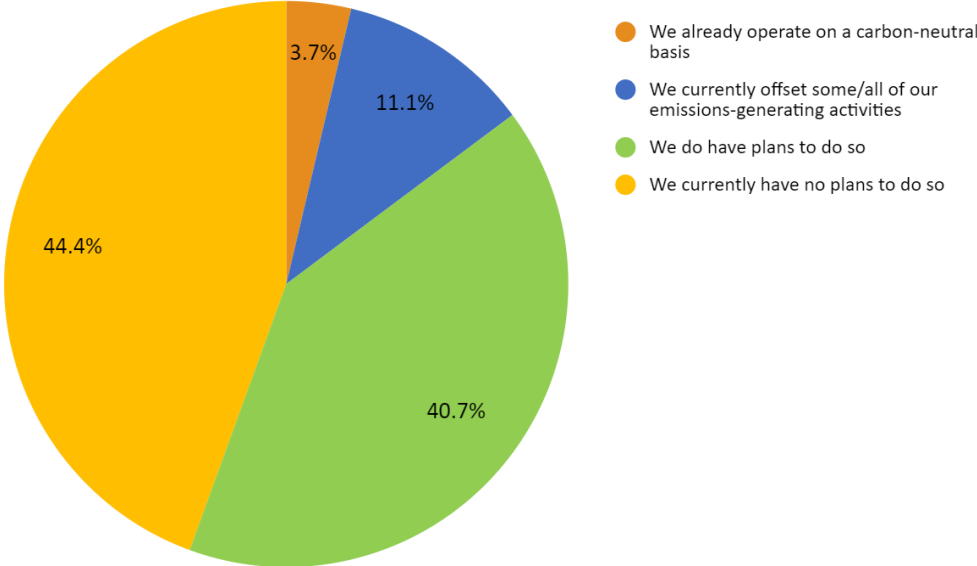


Has your organisation set any emissions targets?



Only 4% of respondents currently operate on a carbon neutral basis, and around half (51.8%) offset at least some activities or plan to do so. Most respondents who are using offsets are large publishers (120+ staff), with offsets purchased or planned for travel, warehouse and office operations.

Does your organisation offset any or all of the carbon it produces?



Office operations

Office operations is an area where most respondents are working towards more sustainable practices. Recycling various materials is the most widely adopted sustainability practice. Air travel for business purposes has seen a dramatic drop in recent years (63% of respondents have reduced air travel to some extent), but it is unclear how much of this is directly related to sustainability efforts or other factors such as cost reduction and COVID-19 travel restrictions.

What steps has your organisation put in place in the office to manage its environmental footprint?	
	Number of respondents
We recycle our office paper	25
We recycle our office plastic, glass and/or metal	24
We recycle our office batteries	22
We've switched all (or most of) our light globes to LED	20
We send all e-waste to a certified recycler	18
We use recycled or FSC paper in the office	16
We compost our office food waste	12
We use sustainable packaging for all our office mailings	11
Our office runs on 100% green electricity	10

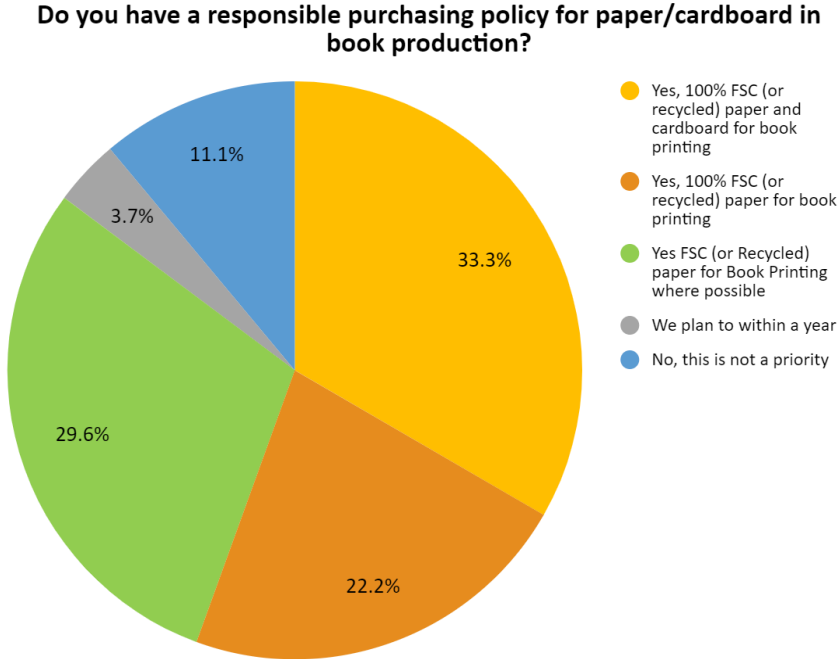
Other office sustainability measures listed by respondents include:

- Using biodegradable cleaning products
- Reduction in paper usage through digitisation of processes
- Removing individual desk bins in favour of communal recycling bins
- Transitioning to an EV fleet of cars and solar power



Production and supply chain

Respondents were asked about their purchasing policies for book printing paper and cardboard. One third (33%) reported using 100% FSC or recycled paper and cardboard for book printing, with a further 22% using 100% FSC or recycled paper but not cardboard. While many publishers (30%) reported using FSC or recycled paper ‘where possible’, 11% said this was not a priority for them.



The survey also delved into publishers’ use of plastics in book production and distribution. Plastics are not biodegradable and are a major source of environmental pollution.

Currently much of the plastic used in Australia goes into landfill and pollutes waterways, ending up as microplastics in the soil and food chain. It is increasingly found in human bodies, with poorly understood consequences. Limiting plastic use, and working towards full recycling and reusing all plastics, is an important goal.

In book publishing, plastics are used in book cover finishes and lamination, in packaging, and printing inks.



Are you producing and delivering books more sustainably, including reducing single-use plastics?	
	Number of respondents
We have a policy of not using glitter in our books	16
Our distributor doesn't use plastic-based fill in delivery cartons	14
We are reducing cover finishes like foil and spot varnish	13
Our policy is to never shrink wrap books	10
We are reducing use of non eco-friendly inks	9
We are reducing plastic lamination on our book covers	8
Our printers do not wrap pallets in plastic for delivery to our warehouse	5

Large Australian retailers have set themselves targets to reduce plastic packaging in the products they sell, and we can expect this will be required of their publisher suppliers. This may involve removing plastic entirely, or including a minimum percentage of recycled plastic. This will apply to packaging in book deliveries, as well as packaging of products on the shelf, e.g. a bundle of books sold together.

The survey also asked publishers to share whether they collect any environmental data from suppliers, or require manufacturers or suppliers to have any sustainability accreditations. Respondents who do so mainly reported seeking data or accreditation details from their printers: FSC Chain of Custody certificates or ISO 14001 environmental management system.

While a number of publishers currently collect environmental data from suppliers (44%) or plan to within a year (26%), 30% report that this is not a priority. Fifty-six percent of respondents require suppliers to have accreditation, 19% plan to do so within a year, and 26% said this is not a priority.



Transporting books and returns

In Australian book publishing, the highest source of carbon emissions is typically transport. This includes inbound shipments to the publisher's warehouse from printers and overseas partners, as well as outbound deliveries to customers. The survey asked publishers about their efforts to reduce their carbon footprint in transport.

Air freight is the most carbon-intensive method to transport books. Fifty-six percent of respondents reported eliminating at least 50% of air shipments in recent years. As air freight was difficult and expensive during COVID-19, this shift is likely to be mainly driven by logistics and cost.

In recent years, there has also been a shift towards more local printing: 72% report greater use of short-run printing and POD. This, too, is likely to have been driven mainly by economic reasons, but the impact on sustainability is welcome. Books printed locally are transported a shorter distance and it is easier to manage print runs accurately with local printing and short run printing.

Eighty-five percent of respondents accept bookseller returns. Of this group, 35% put at least 80% of returns back into the market (including as remainders or donations); 30% don't pulp any returns, while 13% pulp at least 70% of returns. No publishers send returns to landfill: all damaged returns are pulped. Unfortunately paper from pulped books cannot be recycled back into book printing paper or even hardback cases, as the paper fibres degrade, so it is used for lower value products such as kitty litter.

Fifty-nine percent of respondents indicate their distributor uses packaging made from FSC cardboard.



Marketing and promotion

Booksellers frequently complain about receiving hard copy point of sale materials and proof copies that they can't use, or that need to be thrown out a month later to make way for the next month's materials. Publishers are increasingly finding alternative solutions to improve the sustainability of their promotional materials, as well as targeting them more effectively.

Do you create giveaway hard copy promotional materials?	
	Number of respondents
We use some digital reading copies/proofs/samples, and some printed reading copies/proofs/samples	23
We have a policy of not using single-use plastic for giveaway promotional materials	9
We only supply booksellers with hard copy promotional material when they have specifically ordered it	8
Our policy is not to laminate giveaway printed promotional materials	5
FSC paper & cardboard only for printed promotional materials (dumbbins, flyers, posters, bookmarks)	5
We have a policy of digital-only promotions	4
All our reading copies/proofs/samples are printed	3



Improving sustainability

All of the respondents in the survey believe there are many areas in which the industry can improve sustainability, and are looking to the Australian Publishers Association for support and guidance.

What sustainability projects should the APA focus on?	
	Number of respondents
Sharing best practices across the supply chain (publishers, printers, distributors, booksellers)	25
Partnering with other parts of the supply chain on sustainability efforts	20
Documenting the carbon footprint for the book industry supply chain in Australia	15
Create a tool to communicate to readers which books are sustainably manufactured & distributed	11
Developing metrics to guide certification and supply chain awards	11
Actively encouraging readers to adopt ebooks for environmental reasons	5



Appendix

Examples of multinational and independent Australian publishers' publicly available environmental policies:

- [Allen & Unwin](#) (see Allen & Unwin Charities section)
- [Cengage](#)
- [The Flower Press](#)
- [Hachette](#)
- [HarperCollins](#)
- [Oxford University Press](#)
- [Penguin Random House](#)
- [Simon & Schuster](#)
- [University of Queensland Press](#) (see Sustainability section)
- [UNSW](#)

