



IPEd Student Prize winner 2023

Can Australia's trade publishing industry go green?

A discussion of the challenges and possible solutions for implementing sustainable practice within Australia's small and independent trade publishers

by Lauren Connell

IPEd Student Prize

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Introduction

The Intergovernmental Panel on Climate Change’s latest report detailing scientists’ ‘final warning’ (Harvey 2022) on climate is a blatant plea for urgent and coordinated efforts from individuals, industries and governments to limit global heating and mitigate total climate disaster. With the pulp and paper sector placed among the world’s top five energy-consuming industries, and book production emitting 40 million metric tonnes of carbon per year in the US alone (Kaplan 2019; Meyer 2022b), there is no disputing the drastic impacts of book production, distribution and waste on the environment (Norrick-Rühl and Vogel 2013; Magadán-Díaz and Rivas-García 2021). Fortunately, the desire to ‘go green’ and reduce the industry’s environmental and carbon footprint is globally unanimous and enthusiasm for sustainable practice is teeming among publishers large and small (IPA 2021; Meyer 2022c).

Sustainability in publishing is a complex and multifaceted issue; it encompasses and demands action across the entire sector and supply chain from publishers and printers to distributors, booksellers and eventually consumers (Holman and Grover 2020; Meyer 2022a; Glover, personal communication, 26 April 2022). Rather than extend upon discourse of the industry’s already widely documented environmental concerns, this report will critically examine how sustainable practice can be comprehensively embraced throughout the Australian trade publishing industry.

Purpose and objective

Action and investigation into print publishing’s damaging carbon output—resulting from deforestation for paper use, book production, distribution and excessive waste—is sweeping across the global industry and has recently gained traction in the Australian sector (TCK Publishing 2018; Holman and Grover 2020; IPA 2022; Milford 2022; Meyer 2022a). Many of Australia’s major multinational publishers—including Penguin Random House (PRH) and Hachette Australia—outline green initiatives and sustainability goals on their websites. These range from ‘using papers that are natural, renewable, recyclable and made from wood grown

in sustainable forests’ and ‘wherever practical, printing in Australia’ (Hachette Australia n.d.) to various in-office initiatives, including a 100,000-litre recycled rainwater tank installed at PRH’s Collins Street office (Penguin Books Australia n.d.). However, preliminary data on sustainability within Australia’s small and independent presses—as similarly gleaned via publishers’ websites—is more difficult to find (see, Affirm Press 2016; Hybrid Publishers 2020; Scribe 2022; Heyward n.d.; Black Inc. n.d.).

Given the reality that collective and coordinated action is essential to combating climate disaster (Mann 2021), addressing any gap in sustainable initiatives between small/independent and multinational trade publishers is imperative to ensuring that the Australian publishing industry’s response to climate change is as far reaching and effective as possible. Through combining extensive research with observation of overseas models, case studies and empirical, interview-based responses from local publishing professionals, this report will identify key obstacles that may be impeding small/independent publishers from embracing green publishing operations before analysing how to best support and advance sustainable practice within small/independent Australian presses. This report acknowledges its limitations in its capacity to express only the perspectives of publishing professionals who were willing and able to participate in interviews within a restricted timeframe. Nevertheless, understanding the systemic obstacles facing Australia’s small/independent publishers will improve the application of sustainable operation and underscore the kind of meaningful action and support needed to implement green practice within the publishing sector overall.

Challenges

Issues of sustainability within book production and print publishing are multifaceted, complex and, consequently, beyond the scope of this report. Rather, this section will discuss existing systemic factors within the Australian publishing sector and the industry’s entrenched ‘sale or return’ model as key obstacles limiting sustainable practice within small/independent trade publishers.

Size does matter

Steep competition and rising costs are tenacious forces in the book publishing sector (Tian and Martin 2012). Consequently, small/independent presses—typically operating with around twenty staff or fewer—are generally less able to prioritise ‘macro issues’ such as sustainability and green policies (de Vries, personal communication, 20 April 2022; Glover, personal communication, 26 April 2022). Stephanie Bishop-Hall—Production Manager at Affirm Press—stresses that a lack of substantial environmental initiatives in small, medium and independent publishers is ‘not because they don’t care’ (personal communication, 4 May 2022); rather, it can be attributed to a lack of funding, staff and resources to direct towards meaningful sustainable policy. This resonated in many publishers’ responses when asked about current sustainability initiatives and/or awareness within their press. Director of Hybrid Publishers Louis de Vries states, ‘the reality is it is challenging for a very small publisher like us to have formal environmental policies’ (personal communication, 20 April 2022), while Nicole van Kan—Publishing Sales Officer at UWAP—echoes, ‘just keeping our head above water takes up most of our time and energy!’ (personal communication, 29 April 2022).

Such restrictions are nothing new for small/independent publishers in Australia. Historically, they have operated with ‘limited resources’ (Hollier 2008:169) and are more susceptible to ‘possible structural disadvantages’ (Throsby, Zwar and Morgan 2018:34) compared to multinational presses, which are considerably more internally resourced and better equipped to respond to industry developments (Throsby, Zwar and Morgan 2018). In a sustainability context, some emphasise the power publishers yield as customers of printers who can request their printers adopt more sustainable methods of book production (Meyer 2022a). This may be true for major publishers; however, de Vries describes Hybrid Publishers’s relationships with printers as ‘price takers rather than price makers’ (personal communication, 20 April 2022)—suggesting smaller publishers’ negligible clout over print production in reality. In an interview conducted for this report, Stuart Glover, Policy and Government Relations Manager at the Australian Publishers Association (APA),

corroborates this view: ‘We are in a situation where the multinational publishers are ahead of the independents because they’ve got the resources to do something [...] the biggest publishers will have a sustainability director, but that’s just not plausible for the independent publishers’ (personal communication, 26 April 2022). Likewise, a recurring recommendation for publishers looking to ‘green’ operations is to obtain an independent audit of their business for environmental impact (Holman and Milford 2019). Such time-consuming (and costly) initiatives are more easily adopted by multinationals such as PRH Australia. Upon the direction of their parent company, PRH Australia have committed to regular environmental audits every six to twelve months to measure and track the press’s carbon output and environmental footprint, according to Sales Director Gavin Schwarcz (personal communication, 26 April 2022). At the time of writing, PRH Australia is even advertising the role of ‘Sustainability Officer’, a position smaller (less resourced) presses are unlikely to afford (Meyer 2022a). Eco-audits and eco-officers are resolutely ‘not considered’ within Hybrid Publishers, who are typically ‘more busy with bringing [their] titles to press’ (de Vries, personal communication, 20 April 2022). Fremantle Press CEO Jane Fraser explains that in place of independent eco-audits, Fremantle Press does conduct annual strategic meetings that do occasionally address sustainability, though are generally driven by ‘cost efficiencies’ within the press (personal communication, 3 May 2022).

Somebody’s got to pay ...

When asked about their capacity to implement sustainable practice, a common theme identified in the responses of small/independent publishers were issues of funding and cost. Sustainable book production (involving the use of recycled paper, non-toxic inks and non-toxic glues) is expensive and smaller publishers are less able to commit to these options due to the expenses associated with ‘green’ materials (Norrick-Rühl and Vogel 2013; Vanasse 2019; Magadán-Díaz and Rivas-García 2021). In Australia, 93 per cent of small presses cite limited budgets as a key inhibitor to adapting to changes within the industry (Throsby, Zwar and Morgan 2018)—a figure that can arguably extend to the adoption of costly sustainable

operations and materials. Unlike multinationals like PRH Australia, who can rely on the financial safety net of their parent company and PRH UK for support (Schwarcz, personal communication, 26 April 2022), small/independent publishers are disproportionately burdened by a lack of external support, particularly government funding (Throsby, Zwar and Morgan 2018). For example, Bishop-Hall notes that while some printers can adapt to printing with sustainable materials, ‘it’s going to cost an arm and leg’ and is therefore not always an economically feasible option for Affirm Press (personal communication, 4 May 2022). Increased government support in the form of subsidies—explored in greater detail later in this report—to reduce the cost of recycled paper and increase the accessibility of sustainable printing materials—is a solution posed by de Vries of Hybrid Publishers (personal communication, 20 April 2022). Fraser notes, despite requesting the use of FSC-certified (recycled) paper and green materials where possible, the cost of using ‘special’ paper and inks is a significant barrier to embracing sustainable production within Fremantle Press, especially as the recommended retail price (RRP) of the final product is perceived as ‘fixed’ and cannot necessarily absorb the additional costs (personal communication, 3 May 2022).

However, one solution is to pass the cost of sustainable production on to the consumer. Chelsea Green Publishing—a Vermont-based, 100 per cent employee-owned press—is a founding member of the Green Press Initiative renowned for their emphasis on sustainable content and operation (Chelsea Green Publishing 2022). They include an environmental impact statement and ‘worth it’ logo detailing the press’s commitment to sustainability and the eco-conscious publishing process adopted in production inside each publication to justify to consumers their books’ comparatively steep RRP (Holman and Baldwin 2020; Chelsea Green Publishing 2022). Kara Olsen of Patagonia Books—an offshoot of the eco-conscious Patagonia clothing label—details a similar approach. Olsen explains, ‘giving attention to [...] the production of your books will infuse the publisher’s brand with authenticity that readers [...] will both pay more for and respect’ (cited in Collins 2020:13). Either way, until costs of sustainable materials, printing and production decrease,

somebody's got to pay the price to go green. With inadequate external support in the form of government funding directly affecting small/independent presses, and conflicting views regarding Australian consumers' willingness to foot the price of eco-friendly books (Tian and Martin 2012; Eltham 2022; Pengelly, personal communication, 2 May 2022), small/independent publishers will be stuck with the bill.

Wasted effort? The sale or return issue

The sale or return (SoR) model, upon which the industry operates, is fundamentally wasteful and must be addressed to achieve meaningful sustainability progress both globally and within Australian publishing. Traditional bookselling involves SoR models where large quantities of stock are shipped to stores for a three-month window and then shipped back if they fail to sell (Glover, personal communication, 26 April 2022). Traditionally, returned stock—particularly cheap, black-and-white paperbacks—are pulped (recycled into new paper with bleach and toxic chemicals) and/or sent to landfill (Clark and Philips 2008; TCK Publishing 2018). This results in unnecessary waste, carbon emissions—through shipping excess stock back and forth and through burning trees for energy to pulp—and releases highly concentrated methane gas in landfill (Clark and Philips 2008; Tian and Martin 2012; Martin and Haggith 2018). Excess waste is generally a result of scale-of-print economics (where the cost of printing per books lessens with larger quantities) and publishers' tendencies to exaggerate their margin of errors in initial print runs, given the delay in subsequent reprints if stock does sell out (Holman and Baldwin 2020). With an estimated 10 million trees logged 'in vain' for book production each year (TCK Publishing 2018) and a 25 per cent return rate of the approximately 4.15 billion books produced annually in the US alone (Milliot 2006), the SoR model is a major sustainability adversary that must be urgently addressed.

Print on demand (PoD) technology is a widely touted solution to combating the industry's waste and carbon emissions as it enables publishers to tailor print runs according to consumer demand and print only what is needed (Clark and Philips 2008; Tian and Martin 2012; Publishers Weekly 2021). In Australia, over 90 per cent of small publishers have

already made efforts to reduce overprinting and surplus stock, generally to cut costs (Throsby, Zwar and Morgan 2018), with an incidental win for the environment. Fraser highlights Fremantle Press's deliberately short print runs (personal communication, 3 May 2022), while Hybrid Publishers have embraced PoD for select titles and now 'seldom do an initial print run of more than 500 copies' to limit waste (de Vries, personal communication, 20 April 2022). Likewise, Bishop-Hall details Affirm Press's 'almost scientific' approach to calculating print runs to avoid unnecessary pulping—with their sales and marketing team often utilising market research tools such as Nielson BookScan to identify sales trends and quantify print runs accordingly (personal communication, 4 May 2022). At this stage, however, recycled paper options are limited in PoD technology (Vanesse 2019) and while PoD and limited print runs are generally effective in reducing the sector's waste, it is important to ensure that PoD books can be produced with sustainable materials (Holman and Grover 2020).

Proposed solutions

While some solutions pertaining to the industry's key sustainability challenges have been addressed above, the report will now examine several systemic solutions to advancing sustainability in small/independent presses and within the Australian sector more broadly.

Pledges, guides and best practice

The International Publishers Association's (IPA) *InSPIRe* initiative asserts that 'multi-stakeholder engagement is critical' and 'more industry dialogue is urgently needed on how the publishing industry can take action on sustainable development and climate' (IPA 2022). In an Australian context, this requires looking to internationally sourced 'best practice' guides as local resources for publishers regarding sustainable production are currently scant. The Book Chain Project's *A design guide for the Book Chain Project publishers* is a possible answer to this. This international resource aims to 'enable publishers to make informed decisions about all stages of book production' (Godber and Attal-Juncqua 2021:2) by

profiling and ranking the environmental impacts of various inks, papers and other materials used in book production. Another international resource is US-based New Society Publishers's *Going carbon neutral: a guide for publishers*—a document freely available through the Green Book Alliance website providing formulas to calculate carbon outputs and tips on reducing emissions—created to ‘assist any publishers who might want to become carbon neutral’ (Dauncey 2005:2). At the time of writing, the APA is finalising its own ‘Greener Publishing Guide’ with industry-based recommendations regarding eco-conscious book production to foster best practice within the Australian sector (Brown, personal communication, 21 April 2022; Glover, personal communication, 26 April 2022). Alongside best practice guides, pledges such as the IPA and United Nations Sustainable Development Goals (SDG) Publishers Compact invite signatories within the global publishing industry to commit to cross-sector collaboration to advance sustainable practice (UN n.d.). While initiatives outlined in the compact are pertinent—to ‘actively promote sustainability’ and ‘allocate budget and resources to accelerating sustainable practice’ (UN n.d.)—many of the proposed commitments require funding, staff and resources that are likely beyond small/independent publishers’ capacities; the same could perhaps be said of the ‘best practice’ eco-guides detailed above. Moreover, the compact is voluntary and not legally binding (UN n.d.), so while publishers may pledge to follow these suggestions, meaningful environmental progress is not guaranteed until, perhaps, it is appropriately mandated. Regardless, the very existence of the SDG Publishers Compact, alongside other industry-based initiatives such as the UK Booksellers Association’s (BA) ‘Green Bookselling Manifesto’ and the Publishing Declares Climate Action Pledge (UK), are steps in the right direction—raising awareness of sustainability issues within the sector and prompting much-needed conversations among international publishers with outcomes that will hopefully trickle down to Australia’s small/independent publishers (Meyer 2022b).

Go[v] fund me: subsidies for green operation

Participating in an industry besieged by relentless funding cuts (Eltham 2022), Australian publishers are now calling for increased government support to ease the pinch of implementing costly green initiatives. Historically, subsidies issued to publishers through the federal government's Australia Council for the Arts (ACA) have been implemented to 'improve production values or [...] publish a book well' (McLean, Poland and van den Berg 2010:15). While former ACA subsidies were not intended to encourage greener publishing, 'publishing a book well'—in a contemporary context amid the climate crisis—could arguably extend to publishing a book *sustainably*. Depending on the scale of the press, prior ACA subsidies covered up to 100 per cent of the production costs of a book (McLean, Poland and van den Berg 2010). In this case, publishers could offset surplus/saved production funds into sustainable initiatives such as installing in-office solar and other renewable alternatives. Subsidies have, at the very least, 'allowed [publishers] to weigh their publishing decisions differently' (McLean, Poland and van den Berg 2010:33) and, in a contemporary context, might allow less resourced publishers to realistically consider embracing sustainable options and initiatives.

According to Fraser, 'any government incentive for small publishers to offset costs would be welcome' (personal communication, 3 May 2022), while de Vries, Fraser and Bishop-Hall unanimously propose government incentives for local printers to increase accessibility of onshore printing and affordability of sustainable printing materials (personal communication, 20 April 2022; personal communication, 3 May 2022; personal communication, 4 May 2022). Glover of the APA echoes this appeal, detailing the possibility of revitalising the Commonwealth's *Book Bounty Act 1969* which saw publishers paid a lump sum to print titles onshore; this would reduce industry emissions (by limiting freight back and forth) and stimulate local printing economies (personal communication, 26 April 2022). While strong government leadership, intervention and support may incentivise greener publishing, the reality is that until the federal government properly embraces robust climate

policies, Australian publishers are unlikely to see any specially targeted subsidies to support the practical implementation of sustainable publishing operation in Australia (Meyer 2022a; Glover, personal communication, 26 April 2022).

Industry coordination: looking overseas

Beyond practical incentives and government support, action and coordination across supply chains and global sectors are generally considered the most effective means of advancing sustainable operations and standards within the publishing industry (IPA 2021). Australian publishers and industry professionals are increasingly looking overseas for established models for transitioning to a greener supply chain and increasing the sector's sustainability overall (Meyer 2022b). Robbie Egan, CEO of the Australian Booksellers Association (ABA), states:

The [ABA] is investigating ways to help our industry respond to the need for better environmental practices [...] Our colleagues in the UK have led the way and we look to this example with the desire to emulate the initiative, and to build a cooperative approach to improving bookselling and the book industry on both a local and a global scale. (cited in Booksellers Association 2022)

While Egan and the ABA are not explicitly tied to Australian publishers or the operation of Australian presses, this statement nonetheless demonstrates the potential for stakeholders within the Australian book industry to work collaboratively with overseas markets to improve sustainability and reduce the local sector's environmental footprint. Certainly dialogue, cooperation and sharing resources and information across continents and markets is key to building and maintaining momentum towards sustainable publishing, not just within small/independent publishers, but across the Australian sector (Holman and Milford 2019; Bail, cited in Meyer 2022c).

In the meantime, small/independent publishers can, and have, taken steps within their means towards improving sustainability—generally in the form of in-office actions and the aforementioned use of reduced print runs and PoD technology to limit waste. In-office initiatives—such as Fremantle Press's organisational use of eco-friendly toilet paper and

solar hot water—highlight some ways in which small/independent publishers can achieve sustainability ‘quick wins’ while awaiting sweeping systemic change within the industry (Fraser, personal communication, 3 May 2022; Milford 2022). However, with the sector’s major players largely dictating industry standards of operation (Throsby, Zwar and Morgan 2018), progress towards green publishing for small/independent presses is only likely to follow multinational publishers’ and industry bodies’ lead (Glover, personal communication, 26 April 2022; Bishop-Hall, personal communication, 4 May 2022).

Conclusion

It is important to recognise broad industry strides and enthusiasm towards embracing environmentally conscious publishing and improving sustainability within the industry. However, for the Australian trade publishing sector to advance a meaningful and comprehensive response to climate change and combat sustainability issues inherent to print publishing, small, medium and independent publishers must not be left behind in the pursuit of green practice. Despite small/independent publishers’ efforts to limit waste by embracing PoD technology and green in office operations wherever possible, systemic barriers are limiting such publishers’ capacities to further develop sustainability and implement meaningful green operations. Limited resources and funding are ongoing barriers to adopting costly sustainable alternatives to traditional printing and book production methods. Equally, the industry’s deeply entrenched SoR model is a major challenge to overcome, not just in advancing sustainability within small/independent presses, but across the global publishing landscape. Limiting initial print runs, embracing more widespread use of PoD technology and encouraging more recycling of remainders will be instrumental to overcoming the industry’s wasteful SoR model.

Pledges, best practice guides and observing pre-existing models for greener publishing can arm Australian publishers with relevant knowledge and raise awareness of environmental concerns within the industry. However, it must be noted that small/independent publishers are still reliant on the intervention, support and leadership of

government, industry bodies (the APA) and heavyweight multinationals to spur wide-scale progress within the industry. As de Vries explains, '[small publishers] care about such issues, but tend to accept the standards offered by the industry' (personal communication, 20 April 2022). Accordingly, it is recommended that the Australian sector advocates a top-down approach to advancing sustainable operation and standards, as this will increase the viability for small/independent publishers to embrace sustainable practice alongside major publishers. Only then can Australia's trade publishing industry truly go green.

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Acknowledgements

This report was significantly shaped, and enhanced, by the contributions of the publishing professionals who willingly shared their knowledge and insights via telephone, email and in-person interviews during the report's initial research and production. I would like to sincerely thank the following interview respondents for their time, generosity and invaluable expertise:

Stephanie Bishop-Hall Production Manager, Affirm Press

Louis de Vries Director, Hybrid Publishers

Jane Fraser CEO, Fremantle Press

Stuart Glover Policy & Government Relations Manager, APA

Gary Pengelly CEO, *Books+Publishing*

Gavin Schwarcz Sales Director, Penguin Random House