



The Paper Story









Contents

Forewords	2
Introduction	4
Paper's environmental credentials	6
Don't just take our word for it	
here's the proof	8
Paper and the environment	9
What are we doing?	10
Where does our paper come from?	14
Understanding the grey areas	
of green	15
How can we help?	16
Where to go for further information	17

Forewords



Phillip Lawrence

If anyone were to describe an industry that would fit the perfect environmental model it would be along the lines of: an industry based on naturally renewable resources, which draws the majority of its energy requirements from carbon neutral sources, and results in products that are reusable and easily recycled.

There is probably only one industry that satisfies all the criteria of the perfect everyday product for the environment - paper.

Paper is a material that has been the focus of attention around the world. The most obvious reason is, of course, that the main raw material used to make paper is wood. There is no escaping the fact that any use of wood fibre from the world's forests needs to be scrutinised carefully because much of the earth's natural forests are under threat. In poorer countries the pressure of the population is causing deforestation, often driven by the need for food, housing and cheap fuel. In both the developing and developed world paper making is not the significant reason for land clearing. There are currently about 170 international and national forestry certification schemes in operation around the world. Almost every country has introduced certification processes to protect natural forests. While some schemes are less rigorous than others, overall there has been a widespread shift to sustainable forest management around the world to prevent the use of poorly managed and illegally sourced timber. As society demands products, like paper, that are manufactured using wood from well managed sources, the trend towards certification increases and, therefore, the protection of the earth's forests can be assured.

One of the main uses of paper is, of course, printing, one of the world's oldest industrial sectors. It started in China more than one thousand years ago and its use in Europe exploded after Guttenberg's moveable type invention in 1455. Recent research has shown that the printing industry has become one of the world's cleanest industrial processes. Since the Kyoto base year, 1990, the printing sector around the world has reduced its greenhouse gas emissions 'footprint' by as much as 97%. (The Kyoto target was an 8% reduction!) No other industry can boast anywhere near this level of emissions reduction. New technologies, greatly increased efficiency and a total shift in production methods have seen the consumption of inputs drastically reduced and the level of waste material almost down to zero.

Now, the industry is embracing measures such as certification and communication with its stakeholders to take the next steps towards the goal of sustainability. As the users of printed material and paper products, it is up to all of us to become aware of the positive stories from the industry so that we can use paper, paper products and print wisely and responsibly. This will ensure that we continue to reduce our impact on the environment.



Phillip Lawrence

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My vision for Auckland to be the world's most liveable city includes two key drivers – a high value, productive economy, and quality urban, rural and natural environments.

Auckland has a stunning natural environment. It's our responsibility to current and future Aucklanders to protect and improve it, and make sustainable choices.

The paper, paper product manufacturing and printing sectors play an important role in New Zealand's economy, employing 15,200 people in 2009 and generating a turnover of around \$4.9 billion.

In Auckland alone, the sectors employ 6709 people. Fifty seven per cent of employment in the paper and paper product manufacturing sector is concentrated in just two regions, Auckland and the Bay of Plenty, while fifty two per cent of employment in the printing sector is in Auckland.

The New Zealand Paper Forum have developed a voluntary product stewardship scheme designed to address environmental and sustainability issues of paper from the cradle to the grave.

The paper industry has taken a lead in its commitment to continually find ways to reduce its impact on the environment. The paper stewardship scheme involves those at all parts of the product life-cycle from the forestry owners and paper mills through to printers, retailers, and paper consumers. It highlights the need for us all to do our part to ensure that paper and paper products remain sustainable products we can feel good about using.

The challenge for Auckland and its key economic sectors is to become an Auckland that saves energy and resources and reduces waste. Aucklanders can tackle these challenges together with sound policies and partnerships like these.

Len Brown Mayor of Auckland

The paper, paper product manufacturing and printing sectors play an important role in New Zealand's economy, employing 15,200 people in 2009 and generating a turnover of around \$4.9 billion.

Introduction

Paper is a part of life. It's the morning newspaper, your child's favourite book, a school textbook, the packaging your cereal comes in, a treasured family photo. You can touch paper – it is real.

There are a number of misconceptions about the environmental impact of paper. While its manufacture and use can have an environmental impact, this is much less than many people believe. Comparatively, paper is a sustainable product with exceptional environmental credentials.

The paper sector's voluntary product stewardship scheme takes a cradle to grave approach aimed at minimising the impact of paper on the environment at each stage of its product lifecycle. It integrates a number of initiatives within the industry and sets a framework for the future.

Our paper stewardship scheme comprises three parts:

- 1. Measuring and benchmarking recovery and recycling rates each year.
- 2. Developing a best practice guide for the paper sector.
- 3. Developing an education strategy for the buyers and users of paper.

It highlights paper's environmental credentials, provides an insight into how paper compares with other ways of addressing society's needs from an environmental perspective including 'online' communications. It sets out what you can do to help recover and reuse even more paper that is otherwise thrown away.

I'm really proud of the work the industry, suppliers, customers and the community are doing to ensure paper is the truly sustainable product it is designed to be.

Read on for the real paper story and for ideas you could apply to ensure the impact of paper and print is as low as it can reasonably be.

Charles Miller Chairman – New Zealand Paper Forum

You can touch paper - it is real.

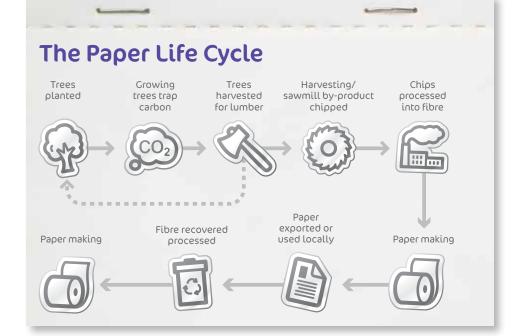


The Paper Story - A Paper Stewardship Scheme Publication

D.S. Granting

Paper's environmental credentials

Paper is extremely versatile. While over 65% of all paper and paperboard products in this country are recovered and reused by the industry, a large proportion of the remaining 35% is reused by consumers – to get their fires going, as compost, to line their pets' cages, or as the canvas for their kids' artwork. And that's great because that's what paper is designed for.



Paper is a choice you can feel good about.

Paper is a sustainable product:

- It's from a naturally renewable, production forest resource.
- It's biodegradable and much of the annual production is recovered and recycled – some up to seven times.
- It has low embodied greenhouse gas emissions (GHG).
- It can be, and frequently is, reused as a biofuel at the end of its life.

"There aren't many industries around that can aspire to becoming genuinely sustainable. The paper industry, however, is one of them; it is inherently sustainable"

Sir Jonathon Porritt, Ex-Chairman UK Sustainability Development Commission and Founder: Forum for the Future. Over the last 20 years the printing industry has reduced its carbon footprint by 97%¹ - a huge achievement that is matched by very few other industries. **Specifically, in the last 20 years the print industry has:**

- reduced the use of mineral inks by using vegetable inks
- developed Computer To Plate (CTP) technology which in most cases removes the need for film - thus eliminating chemicals used as developers
- reduced the usage of solvents by using water-based systems
- reduced waste by allowing remote digital proofing
- reduced the risk of dioxins by moving away from elemental chlorine bleaching.

1 Phillip W Lawrence - Thesis: Barriers and Incentives to Ecological Modernization

Paper is a choice you can feel good about.

Did you know?

- Only 11% of the worldwide timber felled is used directly for paper making wood for fuel and construction are far bigger users.
- Paper and print comprises 1% or less of world greenhouse gas emissions².
- No native trees are used to make paper or paper-related products in New Zealand.
- Paper in New Zealand is made predominantly from radiata pine and eucalyptus species, which have been specifically grown for harvest. The NZ forest industry and local environmental groups such as The Royal Forest and Bird Protection Society entered into an Accord in 1991. No natural indigenous vegetation has been cleared by the forestry parties to the Accord since that time.
- The paper industry has eight representatives in the UN's list of the world's 100 most sustainable companies, more than any other industry³
- The area of managed, exotic forests in New Zealand is stable. Forests are replanted after harvest.
- The inter-dependent forest growing/wood processing industry has a low carbon footprint.
- All newsprint in New Zealand is made from residues from sustainable softwood (radiata pine) resources or recycled paper. Residues are by-products of the building trade. If we didn't use sawmill residue to make our newsprint, it would be exported to another paper maker, burnt or left to rot.

 World Resources Institute, 13.4.2010 on www.twosides.info
 Promotion of Paper – Australian Paper Industry Association, 2008

7.

Don't just take our word for it... here's the proof

Forestry land use in New Zealand fulfils the sustainable management purpose of the Resource Management Act. Fifty five percent of New Zealand's total production forest area has achieved Forest Stewardship Certification (FSC), which, along with PEFC, are arguably the world's most recognised certification systems.

FSC is an audited set of standards that recognises production and consumption of wood products, which are sourced from well managed forests.

Forestry underpinning Australian paper production is subject to State Environmental Protection Authority control. The management of most forests is consistent with the requirements of the AFS (Australian Forestry Standard) which is itself mostly Programme for the Endorsement of Forest Certification (PEFC) certified.

About FSC

FSC is an independent, non-governmental, not-for-profit organisation established to promote the responsible management of the world's forests. FSC certification provides a credible link between responsible production and consumption of forest products, enabling consumers and businesses to make purchasing decisions that benefit people and the environment as well as providing ongoing business value. The FSC eco-label is only awarded to forests, or parts of forests, which have been audited by accredited third parties.

About PEFC

The Programme for the Endorsement of Forest Certification (PEFC) is an international non-profit, non-governmental organisation dedicated to promoting Sustainable Forest Management (SFM) through independent third-party certification.

PEFC works throughout the entire forest supply chain to promote good practice in sustainable forest management and to ensure that timber and non-timber forest products are produced with respect for the highest ecological, social and ethical standards. Thanks to its eco-label, customers and consumers are able to identify products from sustainably managed forests.

PEFC is an umbrella organisation. It works by reviewing and, where appropriate, endorsing national forest certification systems developed through multi-stakeholder processes and tailored to local priorities and conditions.

PEFC has about 30 endorsed national certification systems and more than 220 million hectares of certified forests.

• Suppliers of paper in the New Zealand market know the species of wood being supplied enabling forest products to be traced back to a forest. Most have a formal chain of custody in place giving a guarantee that the paper you buy has come from well-managed sources.

Paper and the environment

The NZ paper industry is a responsible industry which manages the impact of paper on the environment throughout its product lifecycle.

Paper has a great environmental story to tell. Farming trees is like farming wheat or other crops to the extent that you grow the wheat and other crops for food and you grow the trees for housing, furniture, packaging, books, and publications. We, in the paper industry, recognise that there is a need to continually reduce the environmental impact of our production methods. As a result, we have developed a paper stewardship scheme. This is a cradle to grave initiative, designed to encourage

Responsible environmental management arises from many combined actions:



better use of materials throughout the paper lifecycle. A 'continuous improvement' approach means we will improve the efficiency with which we use resources and reduce the amount of waste produced as a percentage of throughput.

Our three key goals for the paper stewardship scheme are:

- to ensure the industry recovers at least 65% of all paper manufactured, imported and sold each year. We will encourage organisations and consumers to put paper in their recycling bins including keeping it separate from general household waste, when not reusing it within their own business or household.
- to source wood and wood fibre from well-managed forests.
- to promote paper as an environmentally desirable commodity

 to show you what paper's actual impact on the environment is vis-à-vis substitute products such as electronic communications.

Did you know?

- According to the Food and Agriculture Organisation of the United Nations (FAO), 90% of deforestation globally is caused by unsustainable agricultural practices⁴.
- The forest products industry is the leading producer and user of biomass energy and produces more energy from biomass than all the energy produced from solar, wind, and geothermal sources combined⁵.
- The NZ paper industry gets up to 80% of its energy from renewable sources including biomass (wood processing residues), geothermal, and NZ's electricity grid - with its naturally high renewable component. This means that fewer fossil fuels are burned which, in turn, reduces carbon dioxide emissions.

4 Source: World Rainforest Movement and FAO UN, December 1998

5 US Department of Energy, 2006

What are we doing?

There are a number of initiatives underway as part of the paper stewardship scheme to reflect the 'cradle to grave' expectation of the Waste Minimisation Act. Success requires the involvement of all those involved in the design, manufacture, sale, use, servicing, collection, recovery, recycling, treatment and/or disposal of all types of paper products.

For more information about what you can do to help, see page 16.

The three areas we are focusing on are:

- 1. Measuring and benchmarking recovery rates each year.
- 2. Developing a best practice guide for the paper sector.
- 3. Developing an education strategy for buyers and users of paper.

1. Measuring and benchmarking recovery rates each year:

Currently, over 65% of all paper is recovered and reused each year. This figure represents the ENTIRE amount which is put out for recycling by consumers, retailers and businesses. New Zealand's recovery and recycling of paper is at world's best practice levels.

Recovery rates of paper are measured year on year by an independent third party (Infometrics is the company that currently measures New Zealand recovery rates). The data is referred to as mass balance data. By compiling this information we can measure our performance and work to enhance our systems for the recovery and reuse of paper.

Mass balance recovery rates do differ year on year, predominantly as a result of changes in paper consumption in New Zealand. One cause (which also partly explains the increased direct exports and lower direct imports over the past three years) is the current economic climate. Production and recovery volumes have remained relatively

fass Balance Data			
Calendar Year	2007	2008	2009
Consumption calculations (tonnes)			
Production	769,700	787,000	785,200
ess Direct Exports	411,200	427,600	491,600
ess Indirect Exports	126,100	119,900	115,700
blus Direct Imports	575,000	552,500	446,200
olus Indirect Imports	103,100	107,000	92,300
ess Stock Change	46,300	-18,700	-20,800
quals Consumption	846,200	917,600	737,100
Recovery	501,100	513,900	504,100
Rate Calculations			
Recovery rate (%)	58%	56%	68%
% of production exported	70%	70%	77%
6 of consumption imported	78%	72%	73%

steady for the past three years and so haven't had a huge impact on recovery rates.

Under the old New Zealand Packaging Accord, paper recovery rates were also measured against other material recovery rates. The New Zealand Packaging Accord was a five year voluntary initiative (2004 - 2009) to cut down on excessive packaging and was superceded by the Waste Minimisation Act. It was signed by the packaging & packaged goods industries, local and central government and the recycling operators. All signatories committed to doing what they could to reduce the proportion of packaging in our total waste stream.

2008 Mass Balance Data for other materials⁶

Recovery Rate
74%
64%
24%
57%

We compile statistics on recovery rates and programmes for reduction in waste in order to benchmark our performance internationally. New Zealand paper and paper product recovery rates compare favourably with overseas paper and paper product recovery rates.

ry rate

6 Source: www.packaging.org.nz



Did you know?

- The only paper which goes to landfill is that which consumers/organisations don't put out for recovery. If you put your paper out for recovery, we will use it. With a recovery rate of 68%, there is obviously some paper utilized or disposed of in other ways.
- The waste companies in New Zealand collect upwards of 80% of all methane produced in modern landfills and use it to provide renewable energy⁷, most recently in the production of biogas to power rubbish trucks. In fact The New Zealand Herald ran an article on 25 November 2010 about the country's first rubbish truck to be powered by biogas from a rubbish landfill. The developers estimate that this form of energy from the Redvale Energy Park Landfill alone will reduce the need for 54 million litres of diesel annually. Transpacific Industries, which owns Redvale, said at least five per cent of New Zealand's transport fuel needs could be met with biogas from municipal and rural waste. Biogas from paper and other organic materials is logically a greenhouse-gas neutral fuel when combusted to CO^2 and energy.
- Most New Zealanders have access to a kerbside recycling service to recycle paper and other products. It is estimated that 97% of New Zealanders have access to either kerbside recycling or drop-off facilities⁸.
- In 2010 PrintNZ surveyed printing companies in New Zealand about recycling habits within their businesses. Of the 63 respondents, almost half recycle between 80-100% of all resources they use in their businesses (including office equipment, computers, stationery, inks and dyes etc).

11.

⁷ Prior to its biogas initiative, methane from the Redvale Energy Park Landfill was used to power 11,000 homes.

⁸ The New Zealand Waste Strategy, published by the Ministry for the Environment, October 2010

Did you know?

- The paper industry's use of waste fibre is important to the New Zealand economy.
- Exports of surplus recovered paper provide an outlet for recycled paper in excess of domestic demand.
- New Zealand's high rate of recovery and reuse is helped by the fact that paper has a wide range of uses. It is cost effective to reuse paper in a form that doesn't require a lot of treatment. For example, reusing paper to match the colour of high quality writing paper could be cost prohibitive but is unnecessary if the paper being reused has a value 'as is' in packaging.
- All paper manufacturers need virgin fibre on an ongoing basis. While paper can be recycled up to seven times, virgin fibres need to be introduced because paper fibres do break down over time or are removed from the system through uses such as fire lighting and landfilling.
- As with other packaging materials, the paper sector recognises that the cost of damaged goods or the danger from spoilt foods is far worse for the environment than using a small amount of extra resources to make a stronger pack. It is not a case of no packaging, but one of how best to deliver goods to consumers while minimising environmental impact.
- The amount of paper waste has reduced through smart design. The Packaging Council of New Zealand estimates that recycling and lighter weight packaging have reduced potential packaging waste volumes by more than 40% over the past decade.



2. Developing a best practice guide for the paper sector:

This best practice guide is being developed for the users of paper and paper-based products. It will suggest processes and procedures for the whole industry 'value chain' including printing and manufacturing businesses, designers, marketers, brand owners, regulators, retailers and consumers. The aim of this is to ensure good information is available to those involved at all stages of the product lifecycle so that paper and paperboard products can be managed with the least environmental impact.

It will cover:

- Sourcing of paper and paperboard packaging (including ensuring chain of custody).
- Reuse of old paper when making new paper and paperboard products.
- Manufacturing of paper and checklists around water use and water consumption, inks and dyes etc.
- Lightweighting how to reduce the

weight of paper and paperboard packaging while still being fit for purpose.

- Tips for retailers about paper and paperboard packaging when buying overseas products.
- Checklists for mass balance calculations.
- Collection and reuse of paper and paperboard packaging.

The best practice guide will be complete by end 2011.



3. Developing an education strategy for buyers & users of paper:

A lot of work has been done by various Governments, associations, organisations and individuals both in New Zealand and overseas to encourage consumers to recycle products at the end of their useful life whenever they can. As a result New Zealanders know about the importance of separating recyclable products from non-recyclable products and are good at doing so. The aim of our education strategy is to educate all existing and potential users on the benefits of paper and paperboard packaging, how to reduce wastage and the existing and developing opportunities for reuse and recycling.

This publication is one outcome of this strategy – we are developing a suite of tools to educate, inform and engage with industrial users of paper and their customers. In addition, individual paper companies have their own plans to engage their customers.

To see further information as it becomes available, have a look at our www.partoflife.co.nz website or join us on Facebook: http://www.facebook.com/partoflife

Did you know?

- New Zealand's paper recovery rates are high as we keep the product clean and high quality. There are currently some questions around the best means of collecting waste paper to maximize the opportunity for recycling, including whether glass should be recycled separately. If glass breaks in transit, it can contaminate other products.
- Many of New Zealand's export commodities are packaged in paper, which is able to be reused and recycled in the importing country.
- The New Zealand paper industry continues to recover and reuse foreign-produced paper and paperboard products that have come into New Zealand via packaged imports (for example packaging on products produced overseas).
- Ten times more energy and material resources go into the production of goods and food than into their packaging⁹. Avoiding spoilage through good packaging is energy efficient.
- According to the Industry Council for Packaging and the Environment (INCPEN) in the UK, if you were to drive one and a quarter miles less per day you'd save as much energy as is used to make the packaging for an average household's whole year's supply of packaged goods!¹⁰
- Over the past 20 years there has been a substantial shift within the printing industry towards using vegetable-based inks and dyes that can break down naturally and that aid the recycling process.

⁹ www.bensongroup.co.uk/environment

¹⁰ www.incpen.org – factsheets: Why packaging?

Where does our paper come from?

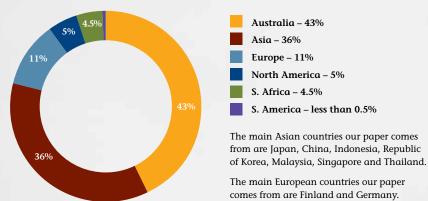
785,200 tonnes of paper was produced domestically in 2009.

r Stewardship Scheme Publication

785,200 tonnes of paper was produced domestically in 2009.

Approximately three-quarters of this was exported. This is because New Zealand is a significant exporter of primary agricultural products and paper manufacturers specialise in producing paper for that purpose. 446,200 tonnes of paper was directly imported to New Zealand in 2009, often in the form of packaging used to contain imported goods. The remainder comprised a wide variety of paper, not produced locally.

Where does our imported paper come from?



Understanding the grey areas of green

Many people compare the environmental credentials of paper with those of online (including PC's, monitors, telecoms, data centres, web servers) and may have been persuaded, wrongly, that 'online' is better for the environment.

In fact: both have a place and both have an environmental impact.

It's important to to understand that electronic doesn't necessarily mean better for the environment.



The key questions to compare print and online are:

- is it renewable?
- can it be recycled?
- what are the emissions?

These need to be answered for all stages of the process NOT just the in-use part.

Making electronic equipment requires:

- mining and refining of minerals and metals
- extensive use of plastics/hydrocarbon solvents
- significant amounts of energy.

Making paper requires:

- harvesting a natural, renewable resource
- low water consumption
- significant amounts of energy, but much of it from renewable sources including bio-energy from wood residues.



Did you know?

- Greenpeace has reported that electronic waste is the fastest growing waste stream and there are extremely serious disposal costs emerging. Many components cannot be recycled economically and there is frequent replacement.
- Each year, approximately 80,000 tonnes of e-waste are disposed of in New Zealand¹¹. The 2010 eday resulted in 900 tonnes of e-waste being diverted from landfill¹² – that's just over 1% of the total waste stream. Compare that with the 65% plus paper recovery rate.
- The CO² emissions of a typical internet search are 7g/search. The impact of 15 internet searches is equivalent to printing one newspaper¹³.
- One email with a 400kb attachment, sent to 20 people, is equivalent to burning a 100w lightbulb for 30 minutes¹⁴.
- e-pad promoters talk about downloading 'a lifetime's reading': on average people read one book per month and the lifespan of an electronic device is two years¹⁵.
- On average it takes 170 kilowatt-hours of electricity to produce 60kg of newsprint, the typical amount each one of us consumes annually. That's the equivalent of the energy consumed by a typical household leaving its electronic equipment on standby for four months¹⁶.
- 60-70% of computers are left on all the time¹⁷.
- The European energy requirements of data servers and IT equipment now exceeds that of the airline industry¹⁸.
- 11 www.sustainability.govt.nz
- 12 www.eday.org.nz
- 13 Dr Alex Wissner-Gross, Harvard University, article at TimesOnline
- 14 BBC, Costing the Earth, Global Warming, April 2009
- 15 Martyn Eustace, Two Sides
- 16 NSA, Paper and the Environment, ATS Consulting, Aug 2007
- 17 Martyn Eustace, Two Sides
- 18 Martyn Eustace, Two Sides

How can you help?

Businesses, charitable trusts, schools

- Paper has an inherent commodity value and so it's worth recovering. If you are a school or a charitable trust, consider running a paper collection scheme as a fundraiser. If you are interested, get in touch with Fullcircle or Paper Reclaim – www.fullcircle.org.nz or www.paperreclaim.co.nz who can do a site-specific appraisal.
- Separate paper out from general rubbish to ensure it can be collected and reused. Where possible, keep it separate from other materials such as glass.
- Place paper recycling bins next to printers and photocopiers so people are more likely to use them. Alternatively, consider desk-top recycling trays.
- Shred some old paper and use it for packing.
- Reuse packing materials and cardboard boxes.
- Encourage your suppliers to take back unwanted paperboard packaging.
- Share this publication with your colleagues, students, clients etc.

Consumers

- If you currently reuse paper within your household, keep doing so.
- Sort any paper you are throwing out. If you don't have recycling bins for paper, keep it separate from general rubbish so that you can put it in the paper recovery bin at your local refuse centre.
- Make recycling easy to do:
- Place a list of recyclable items on your fridge.
- Keep a recycling bin next to your rubbish bin.
- Recycle as you go to save time and hassle when rubbish day rolls around.
- Take large packaging back to the store in which you bought the product.
- Reuse or recycle your greeting cards.
- Wrapping paper can be flattened and reused or recycled.
- Flatten and recycle boxes including cardboard gift and toy boxes.
- Don't drop litter.





Did you know?

- You can add paper to compost, particularly where nutrient rich wastes (such as kitchen scraps) need to be balanced by materials with a high organic but low nutrient content.
- Packaging may sometimes be the most visible litter but, contrary to popular misconception, it is not the most prevalent. By its nature it catches
 the eye!
- Facts in the UK show that cigarettes and gum, NOT PACKAGING are the major constituents of litter in that country.

About the New Zealand Paper Forum

The NZ Paper Forum is the industry body for organisations operating in the paper sector. Its purpose is to share ideas, promote the industry and encourage continuous improvement amongst members.

If you would like further information, or have any questions please get in touch. We'd love to hear from you.

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Where to go for further information

www.printnz.co.nz www.partoflife.co.nz www.facebook.com/partoflife www.twosides.info www.packaging.org.nz www.cepi.org www.fefco.org www.afandpa.org www.wpa.org.nz

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