



Paper Technology

Volume 47 number 5
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The official journal of the Paper Industry Technical Association

Prices out of control?



Turn down the heat.
See page 18



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Paper Technology

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Jyrki Huovila and Petteri Halme
M-real installed a shrink frame packing line with a throughput of over 100 pallets an hour in the new sheeting plant which started up at Simpele early this year. The plant is designed to be one of the most competitive and efficient in the paperboard industry.
- Even small machines can be successful when bottlenecks are removed and product quality is enhanced. For this, there is a range of rebuild options - from headbox to reel- up.



FRONT COVER PICTURE



The UK Paper Industry currently faces one of the toughest challenges it has confronted in modern times. Energy prices are rising at an unprecedented rate, and nowhere more so than in the UK, at a time when Environmental and Commercial pressures have never been higher. The first half of 2006 has seen the industry lose mills at a rate of almost one a month and there is little sign of the situation changing. However, there are measures that can be taken to recover some of this lost margin and this is your opportunity to discover what can be done to protect your mill and your job. PITA are holding an Energy Event in September to answer some questions. Turn to page 18 for further details.

Comment

Two Pulp Mills, The Environmentalists and the Research Institute

By M.E. Marley

Two big Uruguayan pulp projects have come to a 90 day stop. They are the focus of a legal action between Argentina and Uruguay which is currently being decided by the International Court of Justice at the Hague. The mills are :

- Orion, the 1 million tpy BEK mill which Botnia hopes to start up in 3Q 2007, 7 km east of Fray Bentos, in west Uruguay
- Celulosas de M'Bopiqua, the 500,000 tpy BEK mill which Ence is building 12 km from Fray Bentos. Start up is scheduled for 1Q 2008.

There are various levels to the dispute: international and environmental.

At the international level, Argentina claims the right - under the Uruguay River Statute - to participate in the approval process for projects which might have an impact on the River Uruguay.

Both mills are being built near the River which forms a border between Uruguay and the Argentinian province of Entre Rios. From a barge terminal on the Uruguay, Orion will send pulp down river to a new warehouse at the port of Nueva Palmira.

Uruguay argues that since the mills will use non-polluting technology, there is no need for Argentinian approval, water quality being the focus of the Statute.

Further upstream, the River Uruguay forms a border between Argentina and the Brazilian state of Rio Grande do Brazil - the area in which StoraEnso is buying up plantation land to support a 1 million tpy BEK mill. Start up is scheduled in 2012.

This project has the wholehearted backing of the Argentinian province of Corrientes which will supply it with pulpwood.

Downstream in Entre Rios province, opposition to the pulp projects originated in the Asamblea de Gualeguaychu, a local environmental group which is supported by Greenpeace. The town of Gualeguaychu is directly across the River Uruguay from Fray Bentos, and the adjoining bridge has been blocked by environmental protestors - from Latin America and Europe - at various times during the dispute.

Greenpeace has been engaged in a long battle with Arauco over the construction of the Valdivia Pulp Mill in Chile - the environmentalists claim that the mill is polluting a nearby bird sanctuary and are in full battle mode: "We've seen what happened at Valdivia and we are prepared to do whatever it takes to halt the construction of any more pulp mills".

Back in Uruguay, in addition to claims of air and water pollution, Greenpeace maintains that the building works for the barge terminal are illegal as Botnia has not gained approval for the project from the Commission for the Administration of the River Uruguay.

The major legal issue has been heard at the ICJ in the Hague and a decision is pending.

On the technical front, Botnia points to:

- the clean technology which is recognised as BAT under the stringent environmental regulations of the European Union where Botnia runs 5 chemical pulp mills.
- the rigorous environmental requirements of International Finance Corporation, the arm of the World Bank which may finance the project. The IFC insists on an Cumulative Impact Study and local consultation before it takes on any project.

The CIFOR study on pulp projects

Into this atmosphere, CIFOR, the Indonesian forestry research centre, launched a study which claims i) there is a lack of due diligence by banks financing pulp projects in developing countries and ii) IFC studies are no substitute for due diligence because they are overly general.

The CIFOR study, which is funded by the EU and the UK, covered 67 pulp projects including Orion. It maintains that there could be a wave of ill-advised projects based on false assumptions about the origins and cost of wood used in emerging markets. While this is true in some parts of the world, the Study chose as an example the availability of raw material for the Botnia mill in Uruguay.

In reply, Botnia dismissed the Orion references in the Study and presented a detailed picture of its wood supply; 70% from own plantations; 10% from an Uruguayan shareholder; 20% from private forest owners.

But CIFOR stresses that the documentation of the Botnia wood resources was inadequate and the purpose of the Study is to persuade financial institutions to improve the quality of their research into pulp mill projects.

"There may very well be sufficient wood available, but it is never very clear where it's going to come from," says CIFOR.

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News

European producers close 1.2 million tonnes of CCM capacity

The Smurfit Kappa Group is to shut down another 200,000 tonnes of recycled containerboard capacity in the 2nd Half of 2006, following the closure of 266,000 tonnes in the 1st Half - the latter from 4 French mills and 1 German mill, *figure 1*.

In addition, Otor of France has announced the withdrawal of 160,000 tonnes of capacity at its Rouen Mill with the shutdown of PM3 and PM4, and SCA of Sweden has closed the 200,000 Djursland Mill in Denmark.

The shuts and impending shuts will reduce European capacity by some 770,000 tonnes in 2006; and they follow the closure of nearly 400,000 tonnes in 2005.

The impact of this significant withdrawal of capacity is now being reflected in the price of recycled CCM - helped by the economic recovery in Europe and rising demand for containerboard.

After the price decline in the first 3 Quarters of 2005 - despite rising demand in the 2nd and 3rd Quarters - European producers have achieved substantial increases, via two successive price hikes: in 4Q 2005 and 1Q 2006. There is now a push to implement another €30 increase which was announced for 1 June.

The June hike is essential to offset 'rising input costs', in particular, the soaring cost of energy which is driving small mills out of business and preventing bigger operators from returning to profitability.

'First quarter results from our European

operations were unsatisfactory primarily due to rising input costs', says Gary McGann, CEO of Smurfit Kappa. 'The improving market environment is being adversely impacted by rising input costs, primarily energy, meaning that product price increases are necessary simply to recover the rise in input costs during the period'.

According to RISI estimates, the direct energy costs for the production of recycled linerboard and recycled-based white lined chipboard (WLC) increased by 30%-35% in 2005, while chemical costs rose 5% for the year.

Although the price of recovered paper declined by 5-7% in 2005, the total production costs for recycled containerboard increased by 4%, 'leaving industry profitability under significant downward pressure'.

"Our estimate for the recycled containerboard average price/cost ratios suggests that a large portion of these industries has been operating at a loss throughout the past year" says Anne Bousquet of RISI.

Energy and chemical costs are still increasing and now OCC prices are on a rising curve - following the decline of 2005 and price stability in the 1st Quarter of 2006.

This has prompted the push to another round of price increases for June-July. Given the strong demand for CCM and the seasonal maintenance shuts, W. Hamburger believes that chances of success are high.

However, there is a view that the 3rd hike will not be achieved until the Autumn, by which time the corrugated producers may have achieved the price increases they are currently seeking. Smurfit Kappa achieved a 3% increase in corrugated prices in the 1st Q and is now trying to push through another 8-12%.

But, SKG believes that this "is unlikely to be fully achieved", despite the 6%, year-on-year increase in the volume of their corrugated sales in 1Q 2006.

The corrugated marketplace is dominated by overcapacity and fierce competition and profitability is low.

CCM Producers European Top 10

Smurfit Kappa
SCA
SAICA
Mondi
Palm
DS Smith
Prinzhorn
Otor
Ilim Pulp
Stora Enso

SKG:Capacity Closures in Recycled CCM

Papeterie d'Uzerche	France	45,000	1H 06
Usine de Bigny	France	35,000	
Papeterie d'Aubazine	France	50,000	
Papeterie de Vernon	France	50,000	
Wiesloch Mill	Germany	86,000	
Mengibar Mill	Spain	145,000	2Q 05
Clonskeagh Mill	Ireland	55,000	1Q 05
Cordoba Mill	Spain	50,000	4Q 04

Figure 1: In 1H 2006, SKG shut down 266,000 tonnes of European CCM capacity. There are plans to close another 200,000 tonnes in the 2nd Half.

CCM: MILL AND MACHINE CLOSURES 2003-06	
2006: The closure of 770,000 tonnes already announced These shuts will slow capacity growth to around 1%	
Otor, 160,000 tpy at Rouen Mill (PMs 3&4) in France St Regis, a 80,000 tpy grade switch at Kemsley St Regis, the 35,000 tpy PM1 at Wansbrough Smurfit Kappa, the 60,000 tpy Vernon Mill in France Smurfit Kappa, the 45,000 tpy Bigny Mill in France Smurfit Kappa, the 26,000 tpy Uzerche Mill in France Smurfit Kappa, the 30,000 tpy dAubazine Mill in France Smurfit Kappa, the 86,000 tpy Wiesloch Mill in Germany SAICA, the 55,000 tpy Orthez mill in France SCA, the 200,000 tpy Djursland Mill in Denmark	
2005: The closure of 380,000 tonnes Capacity grew by around 5% in 2005 despite shuts.	
Smith Anderson, the 45,000 tpy PM1 at Fettykil, UK Smurfit: the 55,000 tpy Clondalask Mill in Dublin Smurfit, 145,000 tpy at Mengibar Mill in Spain Otor, the 35,000 tpy Iteuil Mill in France SCA, the 100,000 tpy Oftringen Mill in Germany	
2004 The closure of 215,000 tonnes	
Papermark's 50,000 tpy Burnley Mill in the UK Mondi's 65,000 tpy Creams Mill in the UK In Switzerland, Mondi's 50,000 tpy Moudon Mill In France, the 50,000 tpy La Ferrandiniere Mill of Emin Leydier	
2003: The closure of 430,000 tonnes Total capacity grew by 400,000 tonnes in 2003.	
Operating rates fell to 89% from 91% in 2002 and there was a spate of closures including: The BPB Purfleet Mill in the UK Kappa's Mennecy Mill in France One PM at Cartonnerie de Gondardennes, France Papierfabrik Harzer in Germany	

THE EUROPEAN CCM SECTOR CEPI STATISTICS					
	Output	Deliveries	Exports	Imports	Consumption
2005	-	-	-	-	22,400
2004	23,032	22,547	1,529	1,119	22,137
2003	22,490	21,951	1,399	1,161	21,713
2002	21,977	-	-	-	-
Groupement Ondule Statistics for W. Europe.					
2005	21,250 k tonnes of output of which 17,105 k is recycled ccm				
2004	20,691 k tonnes of output, of which 16,494 k is recycled ccm				

Price movements and

The closure of 1.2 million tonnes of European CCM capacity will counteract the start-up of new capacity and slow down the net growth rate to some 1% in 2006 according to RISI.

This is a vast improvement from the 5% net growth of 2005, but it will create a loose, rather than a tight, market and the latest round of hikes - announced on 1 June and designed to offset rising fibre and energy input costs - may be hard fought.

Success will depend on the mills' customers - the corrugated board market which is characterised by overcapacity, fierce competition and depressed prices.

There was some movement in corrugated board prices in the 1st Quarter of 2006, when, for example, Smurfit Kappa, achieved a price increase of 3%. But corrugated producers are now pushing for increases of 8-12% to meet rising input costs, including the increased cost of CCM, which has risen by around 25% since the beginning of the year.

In addition to a tough pricing environment - at €80 a tonne, the price of CCM is still below the 2002 peak of €400 - European CCM producers are facing other challenges:

- Input costs remain high - energy and chemical costs are still rising and recovered paper has moved onto a rising price curve.
- The export trade in recycled CCM will have to face stiffer competition over the next two years as a new wave of Asian capacity comes on stream. In 2004, Europe exported 1.5 million tonnes of CCM, a 9.3% increase on the previous year, according to statistics from CEPI, *figure 3*.
- In the home market, capacity will continue to grow - largely incrementally, although there are two new PMs on the far horizon: the 270,000 tpy Portuguese machine of Europac and the 600,000 tpy German machine of Propapier, *figure x*.

RISI believes that these factors will limit the ability of recycled CCM producers to significantly improve their profitability and as a result there will be another round of capacity closures.

Anne Bousanquet: "Over the past year, the deterioration in profitability has been more severe in the containerboard sector than in the cartonboard sector. For this reason, we expect that a large proportion of capacity closure over the next two years will take place in the recycled containerboard industry."

The pulp price cycle and the wave of new capacity

By M.E.Marley

The price of NBSK remains in the high \$600s in a European market which is characterised by strong demand and tight supply.

As the price moved steadily towards the \$690 tag - proposed by North American producers in May and European producers in June - Weyerhaeuser announced an additional \$20 hike from the 1st July.

In North America too, there is a phased implementation of the \$720 -730 price, for which producers have been pushing for since May.

Bleached hardwood prices are also on the rise with eucalyptus and birch at \$640 on the European list, the highest price for several years. As with NBSK, some suppliers think that there is enough momentum for a \$20 hike in July.

The rising market is driven by the economic recovery of 2006 and tightening supply, the latter the result of capacity closures in North America. Over the last 8 months, some 1.5 million tonnes of Canadian softwood pulp and 500,000 tonnes of US hardwood kraft were withdrawn.

How long will the upswing last?

The hardwood cycle could swing into downturn later this year when 1.5 million tonnes of new Chilean capacity comes on stream, according to VCP of Brazil. This could also help turn the softwood market - an influx of relatively inexpensive BHK could intensify the trend to substitute hardwood for softwood, especially in European and Asian mills.

PULP PRICE MOVEMENTS EUROPE: 2004- 2005		
In 2006	NBSK List	BHK
June	\$690	\$640
May	\$660-690	
April	\$650-660	\$620
February	\$630-640	\$620
January	\$620-630	\$590-600
In 2005		
December	\$600	
November	\$590-600	\$590-600
October	\$590-600	\$590-600
September	\$580-590	\$580-590
August mid	\$588	\$595
August	\$580-590	\$595
July	\$590-600	\$595
June	\$605-598	\$595
May	\$628-610	\$598
April	\$643-638	\$583-597
March	\$647-645	\$551-579
In 2004		
February	\$630-646	\$547
January	\$622-629	\$529-542
December	\$604-621	\$523
November	\$581-600	\$490-506
October	\$580/590	

During the 1st Quarter of 2006, demand for hardwood grew at twice the rate of softwood, In March alone, there was a 7% increase in demand for hardwood kraft, led by BEK and driven by shipments from Brazil to Europe.

The softwood market could also be turned by the start-up of closed Canadian capacity, as:

- prices rise to feasible economic levels, and
- the Canadian Dollar weakens against the US Dollar. This is expected in 2007 when the the C\$ is likely to find a realistic level, somewhere between the high \$0.90 and the low of \$0.60

Market pulp capacity rising by 3.3%pa

Worldwide market pulp capacity is forecast to rise by 3.3% a year in the 2006-2008 period, bringing an additional 4 million tonnes of new capacity on stream by 2008. Most of this will be South American hardwood which is enjoying an growth rate of 5.7% a year.

In the 2nd Half of this year, two huge Chilean projects will come on stream:

- Arauco's 856,000 tpy mill at Nueva Aldea, which will produce pulp from eucalyptus and radiata pine.
- CMPC's 780,000 tpy eucalyptus line at the Santa Fe Mill, which is due to start up in September.

In addition to imminent start-ups such as these, there are numerous projects at various stages of development in Australasia and South America.

Tasmanian Mill - a high cost producer

The odds are 80/20 that the 900,000 tpy Tasmanian project of Gunns will proceed, despite the high cost of its pulp, according to CommSec, the stockbroking arm of the Commonwealth Bank of Australia.

Eucalyptus pulp from the mill will cost \$405 per tonne delivered to Shanghai - its main marketplace - compared to \$250 per tonne delivered by Aracruz of Brazil.

Tasmania's 700,000 tpy - 1.1 million tpy bleached kraft mill is expected to start up at Long Reach in late 2008. It will draw upon the 4.5 million tpy of woodchips which are currently exported by Gunns and which are sourced from native forests and plantations of pine and eucalyptus.

Initially, native forest will supply the vast majority of the woodchips, but gradually, as the mill ramps up to full production, the balance will swing to plantation wood.

However, Tasmanian pulpwood is expensive when compared with South America. Tasmania has higher labour costs and its eucalyptus plantations have a harvest cycle of 13 years compared with 6-7 years in Brazil and 8-10 years in Chile. In addition, when Long Reach is operating at full capacity, pulpwood will have to be transported over distances of 120km.

In view of this cost basis, the Gunns project is only viable when pulp prices are high, which may not be the case, says CommSec. It is possible that the huge South American expansions will meet soaring Chinese pulp demand over the next decade, keeping prices down, and creating a difficult environment for high cost producers.

capacity issues in the European Recycled Containerboard Sector

A bullish outlook for 2006

However, there is a more bullish outlook. Groupement Ondule - the Association of European CCM producers - believes that the huge capacity closures of 2005 and 2006 will create a healthy market, that:

- ‘the arrival of new capacity should not disturb the equilibrium’, and
- ‘in fact the final balance should show a decrease of the European recovered paper base case materials capacities’.

The economic recovery also augurs well for the CCM sector. First Quarter figures from Groupement Ondule (GO) show that 2006 got off to a very strong start with an 8% increase in German consumption of CCM, and a 3.5% increase across Europe.

On an annualized basis, a more restricted growth rate of 2.5% would translate into an additional 600,000 tons of consumption in 2006, says GO.

Moreover, demand in Eastern Europe, the main growth market for West European producers, is strong - even better than expected in 1Q 2006 - and exports continue to rise.

In the final analysis, the deciding factor will probably be the capacity issue and the associated operating or utilization rate. After all, CCM producers were unable to achieve price hikes in the 2nd and 3rd Quarters of 2005 while deliveries soared - up 4.6% in July and 5.2% in August, following a 3.4% dip in 1Q 2005.

CCM CAPACITY GROWTH IN WESTERN EUROPE

2009 1Q: Progroup, a 650,000 tpy CCM machine will be started up at the Propaper Mill in Burg, Germany or in Poland.

2007-2008: Europac, a 250,000 tpy recycled CCM machine at Viana do Castelo in Northern Portugal. Originally scheduled for start-up in 2006, the project has been delayed by environmental concerns and licence problems.

2005-06: 1.4 million tpy of new capacity starts up

This is largely recycled tonnage. The new PMs are:

2006: SAICA in Spain: A 400,000 tpy PM started up in March at the El Burgo de Ebro Mill in Spain.

2005: Emin Leydier started up a 300,000 tpy PM in April at the greenfield Nogent-dur Seine Mill in France.

W. Hamburger, a 260,000 tpy PM at the greenfield mill in Schwarze Pumpe in Germany. Commercial production in 2Q 2005.

Adolf Jass started up a 400,000 ccm machine in East Germany Papierfabrik Varel a new 250,000 tpy PM in East Germany

2004: Cartiera del Polesine, a new 130,000 tpy PM in Italy.

Due closures during the year, total W. European capacity grew by just 50,000 tonnes

2003: Papierfbrik Palm, A new 600,000 tpy PM in Germany. No other major additions to capacity in 2003. Total capacity increased by 400,000 tonnes after closures.

Figure 3: In 2006, the growth in European CCM capacity has slowed down to 1% a wave of closures. In 2005 the growth rate was 5% according to RISI.

EUROPEAN CONTAINERBOARD PRICES ON THE RISE

1st June	SKG		A €30 hike to cover input costs. Demand is strong and maintenance shuts tighten supply
	W.Hamburger		
1st May	SCA	€380	A €30 pan European hike, apart from UK
Feb/Mch	Smurfit Kappa		A €50 hike which was largely implemented
1st Jan	SCA, Mondi		A €50 hike, 1Q demand is strong and stocks are low. Hike is partially implemented
	W.Hamburger		
PRICE CYCLE TURN IN 4TH QUARTER 2005			
4th Q 2005	SKG		A €30-50 hike. Partially implemented
Dec	Mondi UK		A £25 (€43) energy surcharge
Nov	UK		£25-30 increase by two suppliers - the first since the failed hike of April
Oct/Nov	France/Germany		€50-70 increase achieved over two months
Sept/Oct	Italy	€330	€30 hike in 2 phases as the cycle turns
1Q-3Q	Europe	€300	Prices drop throughout first 3 Quarters despite rising demand in 2Q and 3Q

Figure x: CCM prices are rising steadily towards the €400 peak of 2002.

Two 350,000 tpy CTMP mills for Australia

A \$1.4 billion project for the start-up of two CTMP mills in the Green Triangle of south-west Australia has been put together by Protavia, an industrial developer.

The Triangle, which has maturing plantations of *Eucalyptus globulus* - blue gum - stretches through the States of Victoria and South Australia, in which the mills will be located, i.e.:

- The 350,000 tpy Heywood Mill in Victoria is 30 kilometres north of the port of Portland. It is located on a plantation owned by Timbercorp, one of the partners in the project. The mill has received State approval and construction will begin later this year for start-up in 2008.
- The 350,000 tpy Penola Mill in South Australia. With a similar footprint and design to Heywood, it will be located on the other side of the State border, to the north of Mount Gambier. The development application has been lodged with Wattle Range Council, and is likely to be considered this month. If all goes well, construction will start in 2007 and the mill will start up in 2009.

Each mill will be supplied with 700,000 tpy of eucalypt woodchips from Timbercorp's 50,000 ha of blue gum plantations in the Green Triangle. The harvesting of these plantations is due to start within the next two years.

For the pulp projects, Protavia has brought together a consortium of Australian and International companies, including: Andritz, CellMark, Veolia Water, Silcar - in which Siemens has a 50% stake, Timbercorp, Alinta, Toll and Orica.

Stora Enso plans 2 m tonnes of LA capacity

Stora Enso expects to have a blueprint for its two South American pulp mills by the end of this year. Start up in 2012 or 2013.

- A 1 million tpy pulp mill in central or north-central Uruguay. The decision between softwood and eucalyptus hardwood has not yet been made
- A 1 million tpy eucalyptus pulp mill in the southern Brazilian state of Rio Grande.

Stora Enso is acquiring land and establishing plantations in both regions. About 100,000 ha is needed to support each mill and a further 40,000 ha will be ring-fenced to conserve native species.

Stora Enso is also considering the installation of a second pulp line at the 900,000 tpy Veracel mill which started up in May 2005, in the eastern Bahia state. Veracel is a joint venture with Aracruz.

Venezuelan plans for a state-owned pulp mill

The Venezuela government has earmarked \$70m for a feasibility study into a new pulp mill - part of President Hugo Chavez' plan to invest oil revenues in the manufacturing infrastructure of the country.

EPS Pulpa y Papel is one of the 12 industrial partners in CONIBA, the body which has been formed to promote industrialisation.

Preliminary reports suggest that the EPS Pulpa y Papel will build a 300,000 tpy mill which will produce chemical and mechanical pulp. The location of the mill has not yet been decided.

Meanwhile, the 3 year old Serfoca pulp and paper project is still alive in north Venezuela. This involves an integrated

mill which will produce 383,000 tpy of pressurized ground-wood pulp and 400,000 tpy of newsprint.

The partners in the project are Serfoca, a private company, and Corporacion Venezolana de Guayana, a state-owned body which promotes the development of the Guayana region.

Some 502,000 ha of Caribbean pine plantations will be set aside to supply woodchips for the Serfoca Mill by Proforca, a subsidiary of CVG.

In 2003, the Sefcoca project - then known as the Orinoco Project - was costed at \$550 million by Metso Paper.

IP to seek partner for 900,000 tpy pulp mill

International Paper may take on a partner to run the 900,000 tpy BEK mill which is part of an integrated project at Tres Lagoas, in southwest Brazil.

A final decision on the \$1.2 billion project will be made later this year. If it gets the go-ahead, IP will build a 500,000 tpy uncoated woodfree PM on the greenfield site, alongside the eucalyptus pulp mill. Surplus pulp will be sold on the open market.

Botnia and Ence suspend building in Uruguay

Ence and Botnia have agreed to a 90 day moratorium on their Uruguayan pulp projects - to enable the governments of Uruguay and Argentina to resolve the dispute which is ranging around issue of the environmental impacts.

The two mills are near the River Uruguay which forms a border between the two countries. The Argentinians argue they should have been consulted before the projects were approved, under the terms of the Uruguay River Statute. They have taken the issue to the International Court of Justice at the Hague, where hearings took place in June.

Uruguay maintains that, given the clean technology of the mills, there is no pollution issue and therefore no need for Argentinian approval, water quality being the focus of the Statute. Uruguay has agreed to set up a joint team to monitor the mills once they are up and running.

Both mills will use eucalyptus plantations to produce bleached pulp. They are:

- Celulosas de M'Bopiqua, a 500,000 tpy BEK mill at Terminal Logistica M'Bopiqua, an Ence operation which includes a sawmill. M'Bopiqua is 12 km from Fray Bentos in the department of Rio Negro. Start up is scheduled for 1Q 2008.
- Orion, a 1 million tpy BEK mill, 7 km east of Fray Bentos, in west Uruguay. Start-up is slated for 3Q 2007. From a barge terminal on the Uruguay River, the pulp will be transported down river to a new 30,000 m² warehouse at the port of Nueva Palmira. From there, about 70% will be shipped to the European and Asian mills of Botnia's owners, UPM, M-real and Metsaliitto.

Ence owns almost 53,000 ha of forestlands in Uruguay, of which some 40,000 ha are eucalyptus globulus. Currently, woodchips are exported to mills in Europe and Asia by Eufores, an Ence subsidiary. Last year over 500,000 m³ of wood was exported.

The Botnia pulp mill will use 3.5 million m³ py of pulpwood, some 60% of which will be supplied by the FOSA plantations near Fray Bentos. FOSA, which is a Botnia subsidiary, owns 90,000 hectares of land, of which 60% is either planted or suitable for planting. These plantations and the entire procurement chain have FSC certification.

Portuguese government approves new 500,000 tpy PM

The Portuguese government has approved plans to build a 500,000 tpy uncoated wood-free machine at Setubal Mill at a cost of €481 million. The PM is expected to come on stream in 2H 2008 and most of its output will be exported.

The new PM is part of a €900 million investment programme, under which Portucel Soporcel will also:

- modernize the Figueira da Foz and Cacia mills.
- build an 80 MW natural gas power station at the Setúbal site. The plant is to supply the mill's electricity and steam requirements and export the surplus to the national grid.

Setubal has three uncoated woodfree machines and a total capacity of 275,000 tpy. The new PM will increase the company's uwf capacity to over 1.5 million tonnes.

Growth of 4.1% in 1Q 2006

Portucel Soporcel achieved a 4.1% increase in turnover in the 1st Quarter of 2006 - up to €258.5 million .

The Group sold 239,800 thousand tonnes

of paper, a 8700 tonne increase on the same period last year. Paper sales accounted for 68% of total sales; pulp sales for 25% and energy sales for most of the remaining 7%.

The operating result for 1Q was €44.8 million and the net result was €27.6 million - increases of 41.7% and 71.8% compared with 1Q 2005.

This good performance is attributed to buoyant sales, gains in production efficiency and cost reductions. For example, the start-up of the new recovery boiler at Cacia Mill had a positive effect on both production and costs in the 1st Quarter.

The good sales performance was boosted by an improvement in product mix and pricing. The weight of premium papers rose from 56% to 58% of the total and the average sales price in 1Q was 0.4% higher than that of 2005.

Pulp sales totalled 141,300 tonnes, an 11% decline from 1Q 2005. The decline due to the integration of more pulp into the company's paper making operations and to lower stocking levels than in 2005.

The average sales price of pulp up 19.4% from 2005 levels.

Leading UK bank switches to recycled content paper

The Royal Bank of Scotland Group, has switched to recycled content paper for all its office printing needs in the UK and Ireland. This amounts to 4,500 tpy of paper a year, which makes a valuable contribution to developing strong and sustainable UK markets for recycled paper.

"Using recycled paper was one of our targets, in line with our environmental and corporate responsibility objectives", says Andy MacLellan, RBS Director, Group Purchasing. "By working with our business partners, and through close co-operation with our suppliers, we are pleased to have made the transition."

Having decided to make the switch, RBS and Office Depot, its paper supplier, set up a series of trial runs with a variety of copier and a printer manufacturers. These trials showed there was no discernable difference in quality, performance and reliability compared to virgin paper.

RBS also drew on the expertise of the Recycled Paper Advocacy Team at WRAP, a government funded team of paper specialists which offers free advice to businesses looking to switch to recycled content paper.

"This move by RBS shows that recycled papers are reliable for use in a wide range of office devices and their decision to switch demonstrates a real commitment to sustainable procurement", says Jonathan Tame, WRAP's Advocate Manager

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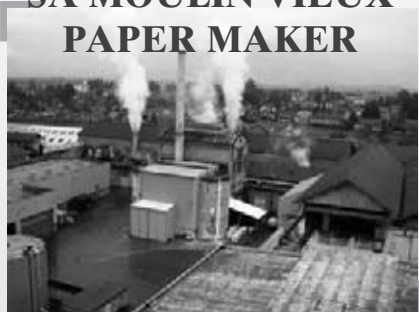
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Chemical prices continue to rise in the 2nd Quarter

By M.E. Marley

The 2nd Half of 2006 has brought a continuing round of price increases as chemical producers seek to offset rising costs.

'Unprecedented and sustained increases in energy, and petrochemical feedstock and freight costs,' are cited by DuPont Packaging & Industrial Polymers as 'significant reasons' for the July hike in the price of Elvanol polyvinyl alcohol for the paper industry.

Canexus of Canada has implemented a worldwide increase in sodium chlorate prices; and, RohmNova has pushed up the price of SA latexes for paper and board markets.

In mid June, BASF raised the price of its entire range of paper coating additives in the North American market - including Sterocoll and Latekoll thickeners, Calsan lubricants, Curesan insolubilizers, FoamBrake, Etingal, and Desan defoamers and Polysalt dispersants.

Clariant, which is enjoying strong sales growth in optical brighteners, held prices at 2005 levels in the 1st Quarter. But, raw material costs continue to rise - by 2% over 1Q 2005 levels - and CEO Jan Secher is now 'placing top priority on increasing our ability to raise prices'.

Since the 15% price hikes of 2004, Clariant has focused on cost cutting and product mix, a strategy which brought a 1% growth in sales in 2005 - over the very strong 2004 levels - and a 1% increase in prices. Over the same period, raw material costs increased by 8%.

The price of titanium dioxide is again on the rise. In the 1st Quarter, Lyondell implemented a €150 a tonne hike in Europe and a \$0.06 per pound hike in the US for all its rutile and anatase Tiona TiO₂ products.

In June, DuPont increased the NA price by \$0.04 per pound and warned of imminent TiO₂ increases in other regions. In January, the European price had increased by €130 a tonne.

Tronox - formerly part of Kerr-McGee - is also increasing TiO₂ prices. In June, the NA price rose \$0.04 per pound for all Tronox pigments. Last year, the European price for Tronox increased by over €400 a tonne in three successive hikes.

In addition to escalating costs, the price of TiO₂ is driven by rising demand in a market of tight supply and by the need for 'reinvestment economics to meet future customer needs'.

Release liner hit by soaring platinum prices

The costs of release liner producers are being driven sharply upwards by the rising price of platinum, a key material for the production of silicone release coatings.

In the platinum market, commodity costs have more than tripled since 1999 - to \$1,340 per troy ounce (31.10 grams) in May 2006. No remission is expected in the near future.

Initially, Dow Corning tried to contain these costs by developing low-platinum systems - Solventless Silicone Release Coatings, which contain significantly less platinum than conventional platinum-catalyzed coatings, which were launched in 2004.

But, with the continuing increase in platinum prices - up 50% over the last year - the company resorted to index-based prices in May 2006, ie to coating prices based on the platinum commodity index.

This creates a fair price and transactional transparency, says Dow Corning. 'Suppliers and customers share the risk of the commodity pricing, while customers clearly see that they are paying only pass-through costs, which can fluctuate up or down.

A vital role in release coatings

Platinum plays a vital role in the pressure sensitive industry. Of the 30 billion m² of release liners and films coated globally each year, more than 80% utilize release coatings catalyzed by platinum.

In little more than a second, platinum changes a coating from a pourable liquid to a hard rubber film. Moreover, liners made with platinum-cured silicone coating require minimal post-cure and exhibit no reversion, which are essential factors for in-line lamination.

As yet, despite intensive R&D, there is no cost-effective alternative to the platinum catalyst. The few possible substitutes, such as palladium or rhodium, are either similarly expensive or in limited supply.

The alternative UV-curable release coatings are approximately twice as expensive as the thermally curable platinum systems. In addition, UV technology has severe technical limitations which restrict it to specialty applications.

A switch away from platinum catalysts is therefore unlikely for most pressure sensitive release coating applications.

A prolonged shortfall in supply

For the last 7 years, demand for platinum has exceeded supply by some 70,000 ounces a year. In 2005, for example:

- Demand grew by 2% to 6.7 million ounces, a rise of 160,000 ounces.
- Supply increased by 140,000 ounces to 6.63 million ounces.

In 2005, the increase in supply - from South Africa, Russia and Zimbabwe - was less than expected:

- South Africa increased output by 2% to 5.11 million ounces.
- While Russian sales increased by 5% to 890,000 ounces, output from the alluvial mines in the East, remained fairly stable.

Zimbabwe supplies grew by 7% to 156,000 ounces and modest capacity increases are underway. But government proposals of March 2006 - to take a substantial stake in the mining companies - puts more substantial investment in the balance.

Meanwhile, demand is soaring, driven by the computer industry, the new LCD glass furnaces of Asia, the chemical and electrical industries and the European automobile industry.

In Europe, there is an overall rise in platinum loadings as emission limits promote the introduction of catalyzed soot filters and diesels increase their share of passenger vehicle sales.

Sales of platinum to the glass industry and for personal computer hard disks both rose by over 20% in 2005.

Although pressure sensitive products consume less than 1% of the world's platinum output, the rising competition for supply creates a serious situation for the release coating industry.

The forecast for 2006 is for strong growth in both supply and demand and a continuing supply deficit in the platinum market.

PRICE MOVEMENTS IN PAPER CHEMICALS			
BASF	Paper Coating Additives	Up 3 cents per wet lb in NA	15th June 06
Buckham Laboratories	Paper Process Chemicals	A 5-7% hike in Europe	14th Nov 05
	All product lines	A 10% price hike plus a freight surcharge (delivered pricing)	15th Oct 05
BIM	Rosin Sizes	Up 25% worldwide	1-Dec-05
	All other pulp and paper chemicals	Up 10-25%	
Canexus	Sodium Chlorate	Up \$25 per ton in US and \$30 per tonne on international shipments	1st June 06
Clariant	Good growth in 2005, esp Optical Brighteners	Price increase of 1%	In 2005
	Wet end & Coating Chems; Optic. Brighteners	Up by 6 to 8%	End 2004
Ciba Speciality Chems	Entire paper and water treatment range	Global hike of 5-30%	21st Nov 05
	Rosin Sizing Chemicals	Up 30% in Europe	1st Nov 05
Dow Chemical Co	Caustic Soda	Up \$30 per ton to \$400 fob	1st July 05
Dow Emulsion Polymers	Elvanol polyvinyl alcohol (PVA/PVOH)	Up 8 Cents per lb outside US	15-Sep-05
Dow Corning	Pressure sensitive product line and Solventless Silicone Release Coatings,	Global prices will be index-linked to the price of platinum	1 July 06
DuPont CSE	All Zonyl and Foraperle paper protectants	Up to 15% depending on grade	15-Jul-05
DuPont P&IP	All grades of Elvanol polyvinyl alcohol	Up of \$0.06/lb on off-list prices	1st July 06
DuPont Titanium	All Titanium Dioxide Grades	Up €130 a tonne in Europe	1st Jan 06
	All TiO ₂ grades	Up 4 Cents per lb in N. America	1st Jan 05
Eka Chemicals	Sodium Chlorate	A price increase across Europe	1st April 06
	Rosin Sizes, ASA, Wet strength additives	European hike	1Q 2006
	Paper chemicals product range	Hikes ranging from 5-20% in NA	7th Sept 05
Georgia-Pacific Resins	Rosin size products	Up 10%	1st March 06
	Wet strength resins	Up 5%	15th Nov 05
	Internal sizing and surface sizing products	Up 8% and 10% respectively	1st May 05
Hercules Paper Technologies	Sales up 1%; volumes down 4%	Prices up 3% over 1Q 05	1Q 2006
	All grades of Sodium Formate	Up 5 Cents per lb: List and Off List	1st July 2006
Huber Engineered Materials	Entire kaolin range for paper industry	Global energy surcharge	3rd Jan 06
	Kaolin products for paper	Up by 12% on average	1st Oct 05
Imerys	Energy surcharge on paper grade kaolin	Immediate price hike or acp	1st Nov 05
	Entire kaolin product range: UK kaolin; Georgia kaolin and Brazilian kaolin	Global hike, respective increases per ton: £15, \$15 and \$30	1st Oct 05
	Entire calcium carbonate product range	Up to 15% per lb	15th Sept 05
Itochu Chemicals America	All TiO ₂ slurry products	Up \$180 per metric ton	1st Sept 05
	All TiO ₂ blends like Ti-BTM	Up \$135 per metric ton	
Kemira	ASA and Rosin sizes	Up 15-25% in Europe	1st Nov 2005
	Other product lines	Up 10-25% in Europe	
Kolb Paper Chemicals	Process chemicals for paper and board	An average price increase of 5%	1st March 05
Kronos Worldwide	All Kronos TiO ₂ produces	Up €130 a tonne in Europe	15-Jan-06
	All Kronos titanium dioxide product	Up €150 a tonne in Europe	1st Oct 2005
Lyondell Chemical Co (formerly Millenium)	All rutile and anatase Tiona TiO ₂ products	Up €150 per tonne in Europe	1st Jan 06
		Up \$0.06 per pound in the US	
	All Tiona TiO ₂ products	Up €160 per tonne. In Europe	1st Oct 05
		Up \$200 per tonne in Middle East and \$0.06 per pound in the US	
Nalco	Paper sizing chemicals	A 20% hike in Europe & Americas	1st Jan 06
	Silicon based products	A 10% hike in Europe & Americas	
	Freight surcharge in Europe	€0.01-€0.03 per delivered kilogram	1st Jan 06
	Speciality Chemicals and programmes	A 10% hike	1st Oct 05
National Adhesives (N1 Starch & Chem)	All adhesive product lines	Broad increase across Europe - to vary depending on technology	1st Nov 05
Nexen Chemicals	Hydrochloric acid and sodium chlorate	Up \$15 and \$20/ton respectively	1st July 05
	Caustic soda, diaphragm and membrane	Up \$30 per ton	1st July 05
Omya	Fine and ultra fine Ground CC products	Up 8% in North America	1st Nov 05
	Steep PSD engineered GCC products	Up 10% in North America	
Rohm and Haas	Hydride chemicals:sodium borohydride, potassium borohydride and sodium hydride	Up 4-6% in Europe	1st Dec 05
RohmNova	SA latex for paper and board	Up \$0.03 per dry pound	15th June 06
	SB and SBA latex	Up \$0.03 per dry pound	
	Hollow-sphere pigments	Up \$0.10 per dry pound	15th Aug 04
Sartomer Company	Styrene Maleic Anhydride(SMA) Resins	Up 5-7% depending on grade	15th April 05
	Powder and flake SMAs	Up \$0.11 per lb	
	Liquid SMAs: H, Hna and MA grades	Up \$0.06 per lb	
Solvay Interox	Hydrogen Peroxide in Europe	To reflect rising energy costs	1st Jan 06
	Hydrogen Peroxide Export grades	Up €127 per metric ton	15th July 05
Thiele Kaolin	Kaolin products	Hikes up to 20% depending on grade	1st Nov 05
Tronox	Titanium dioxide pigments	Up \$0.04 per pound. In NA	1st July 06
(Formerly Kerr-McGee)	TiO ₂ Tronox pigments	Up €180 a tonne in Europe	1st Oct 05
		Up €110 a tonne in Europe	1st Ap 05
		Up €120 a tonne in Europe	1st Jan 05

Fire at SCA Oakenholt

A fire broke out at the 65,000 tpy Oakenholt Mill in Flintshire on 5 June. It started on a combining winder on one of the two tissue machines and spread to the roof of the warehouse. Oakenholt is an SCA mill with two machines PM 1 and 2.

FFIF: head of labour

Jari Forss, 44, has been appointed as Senior VP, Labour Market Policy by the Finnish Forest Industries Federation as of 1 February, 2007. He will join the Federation this September and succeeds Arto Tähtinen.

Mr Forss has worked as head of the labour market policy issues in Finnish Hotel and Restaurant Association since 2001.

Tembec's NBSK hike

Tembec is to increase the price of NBSK by \$20 to \$750 a tonne in North America, effective July 1. Weyerhaeuser and Canfor have made similar moves. Weyerhaeuser has also increased the European price for NBSK by \$20 to \$710/tonne.

In Europe, Temic plans to increase the price of SBSK by \$20 to \$670/tonne. Temic produces SBSK at Tarascon Mill in France.

Décor joint venture

A joint venture for the production of décor papers in Russia has been set up by Mayak of Russia and Technocell Dekor of Germany.

The joint company will build a new décor PM which will increase capacity by up to 30,000 tpy by 2008. Russian demand for décor paper is expected to double over the next 5 years.

Vegetable parchment meets stringent food-contact regulations

The most stringent modern requirements in food contact papers are met by a product which has been produced for more than 100 years at the Saint-Séverin and Bousbecque mills in France - vegetable parchment which is made out of renewable cellulose fibres and is clean and biodegradable. It provides a natural grease-barrier and is produced under strict health and safety condition, by Ahlstrom, the owner of the mill.

The safety of food packaging is a matter of increasing concern and regulations which demand that:

- there is no hazardous interaction between the food and the packaging material, and
- the packaging must have a minimal impact on the environment.

Vegetable parchment meets these needs, says David Degorce, General Manager of Ahlstrom's vegetable parchment product line.

"Genuine vegetable parchment is unique in the way it is produced. It doesn't need the use of chemical additives to form a barrier to grease. With no loose fibre to contaminate the final product, it is natural and safe for direct food contact."

These properties make the parchment the ideal material for baking and food packaging - pastry, cakes, pizzas, or packing greasy,

sticky or wet products such as pastries, frozen foods, fat or margarine.

Vegetable parchment owes its unique features to a two-phase manufacturing process.

- i) the production of the "waterleaf" base paper on a paper machine and
- ii) the "parchmentizing process which jellify the fibres.

The result is a very robust, dense structure that is a natural physical barrier to grease and resins. In addition, the paper has natural release properties and shows heat resistance up to 450°F/230°C.

These properties give the product a range of applications in addition to food packaging, ie furniture laminates, graphic art, cores & tubes and other industrial uses.

The Saint-Séverin Mill which is near Bordeaux has one paper machine, three parchmentizers, two on-line surface treatment facilities and one off-line size coater.

At the Bousbecque Mill, near Lille, there is one paper machine and three parchmentizers.

Ahlstrom is the world No 1 in vegetable parchment and a leader in environmental awareness. Both French mill have earned the ISO 14001:2004 environment certificate..

Waste water is minimized; acids used in the process are 99.9% recycled and the remaining 0.1% is treated in the effluent treatment plant which produces completely clean discharge water.

Smith Anderson papermaking goes into receivership

The papermaking operation of Smith, Anderson & Co has gone into receivership and the two paper machines have been shut down with the loss of 106 jobs.

Last year, in a bid to save the mill, Smith Anderson closed one paper machine down with the loss of 70 jobs. Although the plan was largely successful, it 'was completely undermined by ever increasing energy costs which have made our papermaking business unsustainable'.

UK gas and electricity prices continue to increase and forward prices are nearly 50% higher than when the rescue plan was formulated.

The Group's ability to continue to support the papermaking business has also been curtailed due to its responsibilities to fund the final salary pension schemes.

Fettykil Mills, which has been producing paper for 146 years, was the last mill in Scotland using waste paper as a raw material

Recycling and packaging operations

The future of Securecycle, a waste collection and management service, which also

operates from the Fettykil site, is being evaluated by the Receivers, Blair Nimmo and Tony Friar of KPMG Restructuring. "We remain hopeful that they will secure a future for Securecycle", says a spokesman for the Smith Anderson Group.

Securecycle is a growing business. It provides a confidential waste destruction service for the banking, legal and financial services sectors as well as collecting and recycling a wide range of other paper waste.

The Group's other subsidiary, Smith Anderson Packaging is not affected by the receivership. It produces up to 45 million bags per week - for major fast food and other high street retailers- and has a strong order book.

The rescue plan of last August was followed by a Boardroom shake-up in January 2005 which saw the appointment of a new chairman, Mike Dickson and a new Group MD, David Robertson. At the same time the company sold their envelope manufacturing business to a German firm.

In the last financial year the Group reported an operating loss of £2.2 million.

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PITA Affairs



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The Association in Focus

This is the time of year when the Districts have their Annual Dinners and associated social occasions and in the case of the Northern District; their mill visits. "Around the Districts" is therefore given more space than usual to accommodate full reports and photographs of these activities especially as the two dinners concerned incorporated the presentation of PITA Awards.

The last month also saw the presentation of the paper industry's highest award, The Paper Industry Gold Medal, to long standing PITA member David Klemz, Managing Director of Compact Engineering. The presentation was made by the Rt Hon William Hague, Shadow Foreign Secretary and former leader of the Conservative Party at the 2006 Charter Dinner of the Stationers Company in the grand surroundings of Stationers Hall in London.

Working Groups

This has been a busy period for the Working Groups and would have been even busier had all the planned meetings taken place as originally scheduled. **The Raw Materials Group** had their first meeting under the guidance of their new Chairman, Mark Smith of Omya at that company's splendid new HQ office in Derby. Not having met for some time this was an opportunity for the members to get up to date before embarking on an in depth discussion of their future direction and what benefit they can provide to the industry. It was refreshing to observe the degree of enthusiasm emanating from an albeit small group of people about what they wanted to achieve in the coming months. We

wish Mark Smith every success as he steers this Group along in the future. **The Papermaking Group** held their May meeting at Kimberley Clark, Northfleet Mill and apart from reviewing all aspects of the recent Papermaking Conference also enjoyed a very interesting presentation from Dr Graham Moore of Pira International on the subject of Nano Science and Nano Technology. These are terms which one hears quite regularly these days without really knowing what they are all about. After listening to Graham those present were an awful lot wiser about the subject. **The Engineering Group** were scheduled to meet in May but in the absence of a suitable venue have taken up the invitation to join the Environmental Group when they visit Heysham Nuclear Power station in early July. After a couple of changes of date **The Coating Group** held their meeting at Iggesund Paperboard in Workington on the first day of June. It was good to see some new faces at this meeting including two representatives from the host mill. One of the main agenda items of this meeting was the 2007 Coating Conference including an extended discussion about the venue for that event. It was agreed to research a couple of alternative venues before making a final decision. In the meantime a sub committee has been formed to work on the programme for this important event in the PITA calendar. **The Finishing Group** were planning to meet in early June at Cascades Paperboard in Wednesbury, West Midlands but in the event have had to re-schedule that meeting due to other commitments by the members.

The PITA Board

The PITA Directors had one of their regular scheduled meetings in mid May and welcomed Martin Christmas to his first meeting as a Director of the Association. There was some relief for the Directors in learning that the Association's finances for the first quarter of 2006 were running fairly close to budget largely due to the financial success of the recent conference but that the ongoing difficulties in other areas such as advertising and a contracting membership base will pose real challenges for the future.

John Clewley

Laidler Associates become BSI Distributors

PITA Members, Laidler Associates have recently been appointed distributors for British Standards and would like to offer a 15% discount to any PITA members wishing to buy such standards. They plan to open an internet shop for this service but until such time as that is up and running members should contact Laidlers by phone, stating PITA membership, on 08700 111375.

Around the Districts

Northern District Meeting 12th May 2006

In keeping with the tradition established over many years the Northern District Summer meeting day commenced with a “mill” visit but on this occasion it was not just one but two visits that were not exactly mills. They were plants that use the product produced by mills and in successive operations convert that paper into end use products. First up was Mondi Board at Preston who produce sheet corrugated board on a just in time basis with orders received one day being with the customer the following day. One such customer was the second plant to be visited, The Cardboard Box Company near Accrington, owned by Peter Street and staffed by some other well known figures from the paper industry in the North West. This operation takes in the sheet corrugated board and converts it into all shapes and sizes of cardboard boxes including point of sale displays. These types of operation were largely unknown to many of the District members and provided a great insight into what happens to the product produced in some of the NW mills.

The afternoon was the time to relax and enjoy the usual sporting activities of golf, bowls and in a change from the norm the tennis players (who were all from the same office) opted to play squash. Despite the threat of rain which fell in some quantity in close by areas, the day stayed fine and some excellent golf was played as the subsequent scores indicated. Numbers were down for the bowls and were reduced even further when one player failed to make it to the first end, collapsing during the warm up and one of the enlisted locals had to leave early.

Many of the afternoon players were joined by non participants for the evening dinner and prize giving at Ferrari’s Country House Hotel near Longridge. Peter Street, Ken Swarbrick and David Brennand from CBC were guests of the District at the Dinner together with Andy Read, President of the Allied Trades, David Dredge, National Chairman and John Clewley, Chief Executive of PITA. After a splendid meal and a welcome from District Chairman, Anne Plewes, including thanks to the sponsors of the prizes, the National Chair-



National Chairman David Dredge presents Linda Pickup with her Meritorious Service Award



David Dredge presents Anne Plewes and Adrian Day with the Bowls Trophy



Gary Heap receives the Golf Trophy from District Chairman, Anne Plewes



John Eagle receives his prize as winner of the Squash competition.

man had the pleasure of presenting local District stalwart Linda Pickup with a PITA Meritorious Service Award. On this occasion and in keeping with a lady recipient the Award was in the form of an engraved pewter wine goblet. Also in keeping with the tone of the evening and the familiarity of the individuals concerned the National Chairman's words were more by way of a "roast" with a response in kind from Linda, all much enjoyed by those present.

It was then on to the even more light hearted presentation of the sports prizes, and again due to the generosity of the sponsors nobody went away empty handed. Winner of the Golf with the splendid score of 38 points was Gary Heap closely followed by Jon Rymer with 37 points. Highest score on the Par 3s was Bob Taylor with David Sears nearest the pin on the designated hole (although it was rumoured he was not even on the green!). Victors in the bowls (and we were re-assured that it was not a fix), were Anne Plewes and

Adrian Day followed in second place by John Rotherham and Sharon Hoole.

Of the three squash players, John Eagle was victorious followed by Keith Millington.

Northern District Summer Meeting Prize Sponsors

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- Clariant
- Eka Chemicals
- Huyck UK Ltd
- Kadant
- Nalco
- Omniachem
- RaKeM
- Sandusky
- Smithtech Engineering
- Voith



David Christie receives the PITA Insignia from Chief Executive John Clewley, supported by his wife Millicent and District Chairman Tony Foulds.

Scottish District Dinner 19th May 2006

One week later the Scottish District enjoyed their equivalent day but here there is no tradition of a mill visit with the day commencing with the afternoon sports activities of Golf, Fishing and Clay Pigeon Shooting. Again the weather was kind and a good afternoon was enjoyed by all.

The dinner in the evening was held at The Dean Park Hotel, Kirkcaldy with David Christie and his wife, Millicent as special guests of the District to honour David's receipt of the PITA Insignia. Also present as a guest of the District was Andy Read, President of the Allied Trades. After another excellent meal and in the absence of the National Chairman due to other commitments, Chief Executive John Clewley had the privilege of presenting David Christie with the PITA Insignia, first describing some of the



Golf winner Andy Smylie is congratulated by organizers Ian Paterson and Moira Brown.



Jacquie Page congratulates Ian McMaster on being declared winner of the clay pigeon shooting.



Murray Wallace and Alistair Whittaker received an honorable mention as runners up in the shooting.



Kenny Barker receives the Clariant Shield for the biggest fish caught on the day, from Chris Hall of Clariant.



Stewart Craft receives the fishing prize for the largest overall catch from organizer Bob Rishton.

history of this award and acknowledging the support of Woollard and Henry in providing a second set of PITA watermarked wires to enable a second batch of Insignias to be produced. John then went on to outline David's contribution to the Association over many years and in several different roles that had led to him being awarded the PITA Insignia. District Chairman, Tony Foulds then presented David with a Quaich as a gift from the District Committee.

Matters then moved on to the presentation of the prizes for the afternoon's sports activities, the only separate report received was for the Fishing which is shown below. Winner of the Golf was Andy Smylie from Guardbridge. On this occasion the Clay Pigeon shooting was not run on a competitive basis but much more on a fun basis. Nevertheless it was agreed by all involved that the best performance of the day was by Ian McMaster who was therefore declared the winner and received the trophy.

During the course of the evening, in true Scottish District tradition there was a collection for charity that raised £100 to be donated on this occasion to a charity of David Christie's choice. David's choice was Mary's Meals in Malawi, a charity that aims to provide meals for otherwise starving children in that country.

John Clewley

Fishing Report

Six anglers turned out at loch Fitty on a day for which the weather was much kinder than forecast. It remained mainly dry throughout with light winds. The fish were less cooperative than we hoped for, but a total of 11 trout were taken for a weight of 29lb 11oz.

Stewart Craft of Smith Anderson emerged victorious with 4 fish (10lb 2oz) and as the overall winner was presented with the cup at the dinner in the evening.

Kenny Barker who is now happily retired caught the biggest fish with a weight of exactly 3lb and he was presented with the Clariant Shield in the afternoon by Chris Hall from Clariant, before heading back to Fort William.

Once again we had a good day at Loch Fitty which is a well run fishery in pleasant surroundings and we look forward to next year.

Bob Rishton



THE PITA ENERGY EVENT

late September 2006

ENERGY SAVING

Would the last person to leave,
please turn off the lights?

The UK Paper Industry currently faces one of the toughest challenges it has confronted in modern times. Energy prices are rising at an unprecedented rate, and nowhere more so than in the UK, at a time when Environmental and Commercial pressures have never been higher. The first half of 2006 has seen the industry lose mills at a rate of almost one a month and there is little sign of the situation changing.

However, there are measures that can be taken to recover some of this lost margin and this is **YOUR** opportunity to discover what can be done to protect **YOUR MILL** and **YOUR JOB**.

What is the Current Situation?

High profile speakers from the industry and energy supply sector will provide an overview of the impact of rising energy costs on our industry and our ability to compete with both European and Far Eastern production costs.

What can we do now?

Mill personnel from the Newsprint, Packaging, Tissue and Fine Paper sectors will describe work currently being undertaken to stem the tide of rising energy costs and recover some of that all important margin on the bottom line.

What do we do Next?

Experts from the Energy Supply and Energy Efficiency industries will critically review the UK Paper Industry and put forward potential strategies for future energy usage.

What support can we Expect?

Speakers representing the government will highlight the schemes available to support the investment needed to encourage a sustainable industry.

Finally, and most importantly, your colleagues from other UK Mills will be there to discuss the day's events.

Whether you come from a production, technical, environmental or engineering background; If you currently work in a Paper Mill, and want to be working there in five years time, **THIS IS ONE EVENT YOU CANNOT AFFORD TO MISS!**

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AquaEnviro for WRAP

Project code: GLA36-010
Research project: November 2004 - June 2005

Final Report: January 2006
WRAP, The Waste & Resources Action Programme
www.wrap.org.uk

Full Scale Trials of Recycled Glass as Tertiary Filter Media for Wastewater Treatment at Stubbins Mill

Filamentous bulking and foaming is a well known problem in the treatment of mill effluent and a major cause of consent failures.

Bulking is caused by the proliferation of filamentous bacteria which reduce the settling velocity of the biological solids in the final clarifier. This causes an overflow of suspended solids and a breach of consent.

Conventional treatment systems - using sand filtration - suffer from backwash failures which lead to sand blinding and a reduction in the flow rate through the filter. Such problems can be overcome by continuous, moving bed systems, but these require larger and more expensive sand media.

This feature describes the trial of a new filtration medium - recycled glass - at Stubbins Mill, where the tertiary sand filters had been de-commissioned and bypassed because of constant blinding of the beds and odour-related problems.

Trials were also carried out at a domestic water treatment plant and at a vegetable processing plant.

The trials show that glass is more effective than sand during backwash and that glass media may overcome many of the blinding problems suffered by full-scale sand filters.

The costs of recycled glass media are £220/m³ as compared to £100/m³ for conventional sand - as used

Aqua Enviro tendered for a WRAP funded project to compare the effectiveness of a range of media manufactured from recycled glass when used for the tertiary treatment of wastewater.

Tertiary treatment is the last stage in the treatment process and is applied immediately prior to the effluent being discharged to watercourse. It is routinely employed for the removal of suspended solids and the organic contaminants associated with these solids, from the effluent produced during the biological treatment of effluents.

Its role is to ensure that the treated effluent will comply, at all times, with the standards that have been set by the Environment Agency to permit the discharge of the treated effluent to a receiving watercourse (usually a river, estuary or the sea). These standards or "consents" specify three parameters:

- i) the maximum permitted flow
- ii) the biochemical oxygen demand (BOD) and
- iii) the suspended solids.

Other parameters may also be included depending on the environmental quality objectives in place for the receiving watercourse. Consents for ammonia and chemical oxygen demand (COD) are common and increasingly total phosphorus and total nitrogen are included. Consents may also include, *inter alia*: iron, aluminium, pesticides and temperature.

Meeting the discharge consent is the sole purpose of wastewater treatment and the implications for failing consent include: a financial penalty levied by the courts, the attendant bad publicity and, in severe cases, a custodial sentence on Company Directors.

Thus industry invests a lot of time and effort in ensuring plants do not exceed consent. The needs of domestic wastewater and industrial wastewater for tertiary treatment are not dissimilar although the wastewater produced is very different.

Domestic Wastewater Treatment

There are around 7,500 treatment plants in the UK operated by the water companies and of these about 85 are small plants treating populations of <5,000 people. There are only about 400 plants treating population of >10,000 people.

Smaller plants are more likely to give operator problems and consequently to have consent failures. Most consent failures are associated with a loss of solids in the final effluent due to poor performance of the final clarification stage of treatment.

This may be a result of clarifier design and operation or the plant may simply be overloaded. However it is more likely to result from a biological problem known as filamentous bulking and foaming.

In the UK, 60% of plants suffer bulking on one or more occasions each year. It is caused by the proliferation of filamentous bacteria whose presence reduces the settling velocity of the biological solids in the final clarifier. As a result, there is a major risk of suspended solids overflowing the final clarifier and prejudicing consent.

It is the problem of high effluent suspended solids that is tackled in this report by the application of tertiary treatment, using recycled glass as the tertiary filter medium.

Tertiary sand filtration is one traditional engineered solution to tackle the problem of high effluent suspended solids. Although this technology has proved reasonably successful, many sites have experienced problems.

These have generally resulted from failures in sand backwash which have led to the sand blinding with a reduction in the flow rate through the filter. In addition, there have been examples of channelling in the sand bed which has led to short circuiting with a consequent reduction in performance.

Problems with backwash have been overcome by the development of continuous, moving bed backwash systems. The moving bed systems have required different mineral media based on sand but with larger diameters and a consequent higher cost.

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Surface Improvements with New Clothing Technology

New paper surface issues are emerging with the advent of higher printing demands and new PM concepts - with their higher speeds and higher dewatering needs.

These developments have triggered the development of new clothing technologies which enable papermakers to improve sheet properties without a negative effect on dewatering and runnability.

In particular, the influence of press fabrics can make a huge difference to surface properties and to the runnability and therefore profitability of a paper machine.

The demands on printability are increasing for nearly all paper grades. At the same time machine speeds are getting higher and new machine concepts require higher dewatering.

In the press section there is a tendency towards a reduced number of press nips using shoe press technology. Every irregularity in the paper machine clothing gives a negative impact on sheet surface properties.

Due to price pressure, paper makers are pushed to raw material cost savings by using less expensive material to fulfill the same demands. Paper surface problems also increase the use of additional online and offline machines such as calenders.

With new clothing technologies, especially in the press fabric area, it is possible to improve sheet properties without having a negative effect on overall dewatering and runnability.

Forming Fabric Development

In recent years, there is a tendency towards the use of sheet support binder fabrics (SSB) for a wide range of applications. The SSB fabrics can be seen as a “laminated” fabric which is bound together with a binder yarn out of the warp or the weft, *Figure 1*.

With this type of design, it is possible to achieve a very high number of support points on the paper side of the fabric which creates a very good formation of the paper web. Typical wire marks can be reduced significantly. *Figure 2* shows the range of support points for different SSB design types. They exceed the number of 1000/cm² by far which is a huge improvement compared with traditional forming fabric designs.

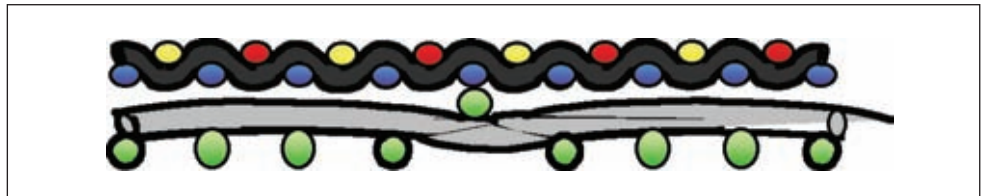


Figure 1: SSB Forming Fabric

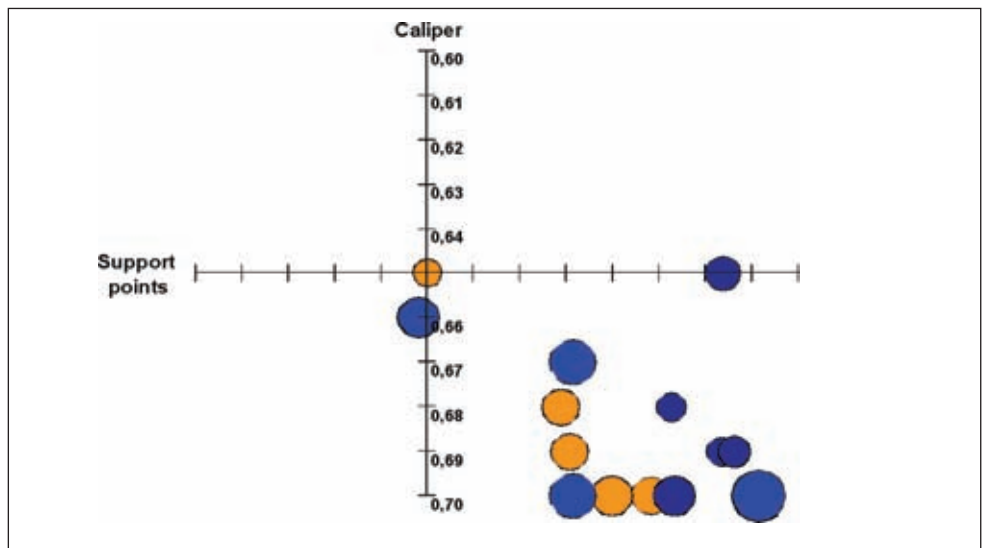


Figure 2: Support points SSB designs

Case Studies Forming Fabrics

The following two cases will show the possibilities of surface improvements when using the SSB technology.

A Newsprint paper machine running at 1840 m/min changed the bottom fabric on the DuoFormer CFD to a SSB design with high support points. As a result, two-sidedness was reduced from 20 to 7 ml/min. Additionally, they could save about 15% of their retention aid due to the improved formation with the new fabric design.

On a LWC machine, two-sidedness was improved from 1.5 down to 0.5 PPS with the change from a standard fabric to a SSB type fabric. Dryness target and life time was on the same level than before.

Press Fabric Surface Technology

Figure 3 shows a typical modern press section with shoe press technology and a complete closed draw. The press fabrics are always in contact with the sheet. Therefore and due to the long dwell time in a shoe nip fabric, uniformity is a key issue for the sheet surface properties. Every irregularity - either from the base or the fabric surface - creates an imprint into the paper surface.

Advanced press fabric technology can improve the macro uniformity (base layer) and the micro uniformity (fabric surface fibres) of the press fabric. For macro uniformity, the fabric has a non woven triaxial layer which covers the weave knuckles of a standard base layer, Figure 4. This special triaxial Vector layer creates a much more homogeneous pressure transfer in the nip thus giving a smoother sheet surface. Results from analysed paper samples are shown in Figure 5.

To further improve the micro uniformity of the press fabric Surface, Voith Paper Fabrics has developed a special thermal treatment of the fibres. The use of very fine fibres without special treatment can lead to fibre shedding and short life times.

The pictures in Figure 6 are showing how press fabric fibres can affect the sheet surface by giving imprints under nip pressure. A more uniform fabric surface can reduce the number and size of these imprints significantly. The difference between a untreated and treated fabric surface can be seen in Figure 7.

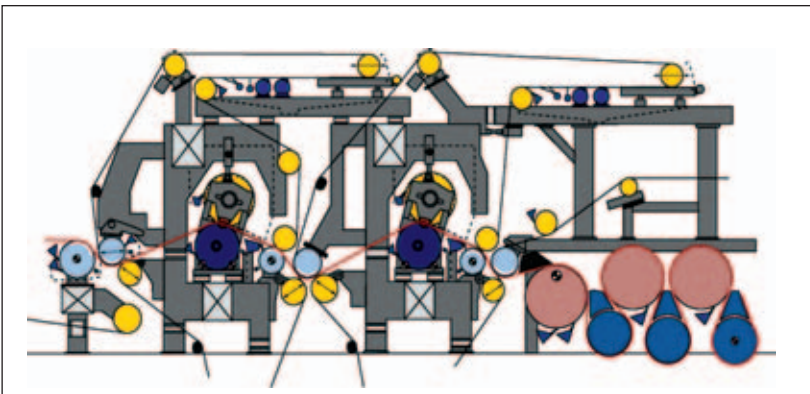


Figure 3: Tandem NipcoFlex Press Section

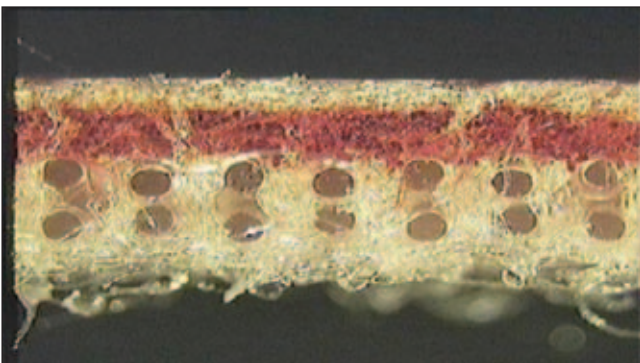


Figure 4: Vector Layer (red)

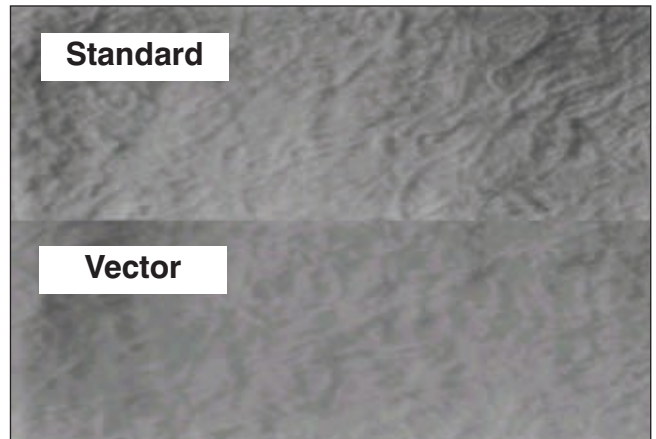


Figure 5: Paper sample comparison

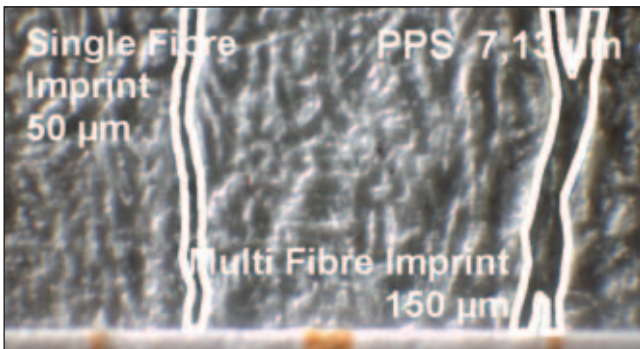


Figure 6: Fibre Imprints on paper surface

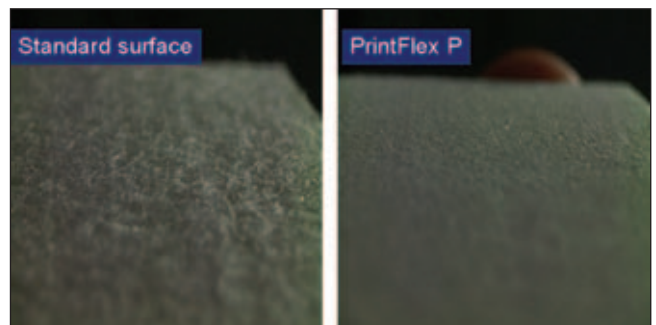


Figure 7: Press fabric surface comparison

In the diagram of *Figure 8* we present the print trials we have made with paper produced with different fabric configurations on the Voith trial machine. This diagram shows clearly the positive effect on printability with the treated surface of the PrintFlex P press fabric design.

Similar improvements were measured for mottling, print density and missing dots. *Figure 9* gives another example of this improved surface properties of the paper sheet. The paper on the left side produced with the advanced surface technology for press fabrics shows much less fibre imprints than the sheet produced with a standard fabric design.

Case Studies Press Fabrics

Many successful trials have been carried out so far, including the following two examples:

The first concerns a board machine producing high quality Folding Box Board. The three double-felted press section configuration comprises two roll presses and one shoe press. Press 1 and 2 are roll presses while Press 3 is a shoe press.

The mill has changed the entire top press fabrics to the surface treated PrintFlex P design. This resulted in a 20% improvement of the PPS values.

Coating weight and calender work can be reduced with big cost savings for the mill.

The second example is from a high speed paper machine producing SC paper grades. Here the single felted third roll press was the critical area with regard to two-sidedness and printability. The surface technology of the Voith Fabrics brought the PPS values of the bottom side of the sheet from 1.80 down to 1.65 which nearly eliminated two-sidedness. In addition, the printers reported improved printability in term of less missing dots.

Next Step in Surface Improvement

Voith Paper Fabrics is already working on the next stage - the improvement of the micro uniformity of press fabrics.

Figure 10 shows the concept of a porous belt to reduce fibre imprints even more without losing dewatering capacity.

Dryer Fabrics Development

The influence of dryer fabrics on sheet surface properties is not so big, but attention should be paid on some features of dryers. A high number of contact points can provide higher and more uniform drying which also influences to some extent sheet surface properties. On grades for which the surface is critical the use of these woven designs is the right choice. Alternatively, there are flat spiral fabrics or polished spiral fabrics available which are also suitable for critical grades.

Dryer fabric seam technology is another issue to pay attention to. The use of finer loops to prevent caliper differences between seam area and the body of the fabric has to be considered on surface-critical paper grades.

Summary

Higher demands on paper surface properties and new machine concepts require new clothing technologies. In particular, the influence of press fabrics can make a huge difference in terms of sheet surface and also the runnability and therefore profitability of a paper machine.

New technologies and designs in press manufacturing can lead to big savings.

The right clothing concept adapted to the needs of machine will enable a mill to widen the production window for a better machine productivity.

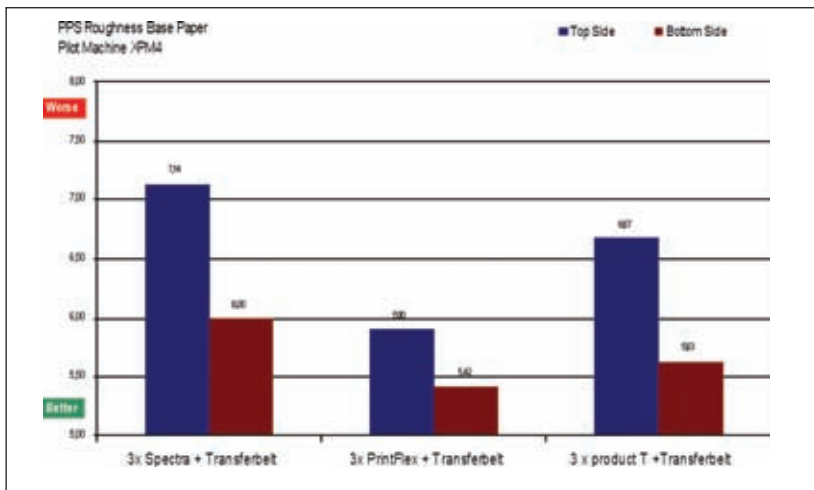


Figure 8: PPS comparison trial machine

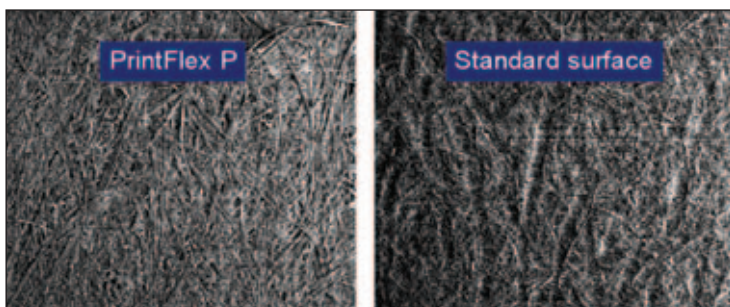


Figure 9: Paper surface comparison

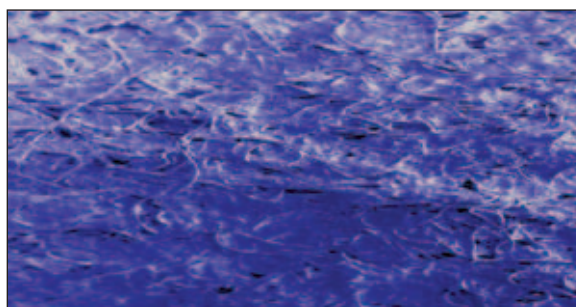


Figure 10: Porous belt surface

M-real Simpele installs one of the world's most productive sheeting plants

The Simpele BM3 Rebuild

Simpele BM3 in Finland is a 4.1 m machine which produces FBB in basis-weights of 200-400 g/m². The rebuild was executed by Metso Paper with the following objectives:

- A speed increase to 600 mpm and a 45,000 tonne capacity increase to 215,000 tpy
- An improvement in visual uniformity, printability and stiffness.

The delivery included:

- the modification of the refining systems,
- new generation headboxes for all three

plies; dilution control for the filler ply and the extension of the wire section of bottom ply,

- replacement of the pond sizer by a Val-Sizer,
- drying section modifications after the sizer and coating dryers,
- a new intermediate calender, and reeler.

A new OptiStream roll finishing system was installed, including winder, wrapping machine and roll handling. OptiStream integrates the finishing operations and information management into one process enabling one team to control both the winder and the wrapping machine.



Figure 1: The new production plant of M-real's in Simpele, Finland.

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Jyrki Huovila and Petteri Halme

Rautpohja Paper and Board Machinery,
Metso Paper, Finland

The high production rates of new PMs place pressure on the economics of existing lines. To remain competitive, the latter must be tuned to the highest output and quality via carefully planned rebuilds.

But history shows that even small machines can be successful when bottlenecks are removed and product quality is enhanced. For this, there is a range of rebuild options - from headbox to reel-up.

The right headbox can improve formation and strength and enhance PM performance. The options include the cost-effective, single tube bank Valflo headbox and a partial rebuild via the installation of dilution bank via the RetroDilu kit.

In the forming section, where 97-98% of total PM drainage takes place, rebuild options include the hybrid top formers such as the new ValFormer. The latter is designed to improve quality and output without the need for excessive investments in the existing construction.

The speed and productivity of the press section can be enhanced by a shoe press which can increase ex-press dryness by 2-8%. Options include:

- single and double nip shoes;
- the replacement of one roll press with a shoe and
- two stand alone shoe presses with supported sheet transfer.

Removing Paper Machine Bottlenecks with Targeted Rebuilds

Increasingly global operations and the generic development of technology place ever-growing pressure on PM productivity. The greater and greater production rates of new paper machines place pressure on existing lines to stay competitive, at least among the so-called standard quality bulk paper and board grades.

A single papermaking line has to remain fit and competitive every day. Carefully selected and perfectly matched rebuild products are one good tool for maintaining and improving the competitiveness of an existing paper machine.

However, history shows that the small can survive. Smaller paper machines can improve their competitiveness with clever investments. This may require rebuilds designed for both production increase and paper or board quality improvement.

Rebuilding a paper machine actually means removing or fixing any known bottlenecks to achieve higher productivity and a steeper earnings curve compared to the existing situation.

Addressing bottlenecks, together with possible quality enhancements, can produce a steep turn in the cash flow gradient of an old machine. This also improves the overall economics of a paper machine line, *figure 1*.

A well-executed rebuild is targeted and designed to remove any known paper machine bottlenecks, and it consists of:

- analyzing and determining the true bottlenecks of an existing paper machine line
- selecting the best-fit products and means for removing the bottlenecks
- carefully planning and designing machinery and auxiliaries that are a perfect fit for the existing equipment and are smooth to install
- paying special attention to the startup and supporting it with specific expertise to get a steep startup curve, which enables the fastest investment payback.

Metso Paper is capable of offering a wide variety of rebuild solutions - for every paper or board machine section and application for

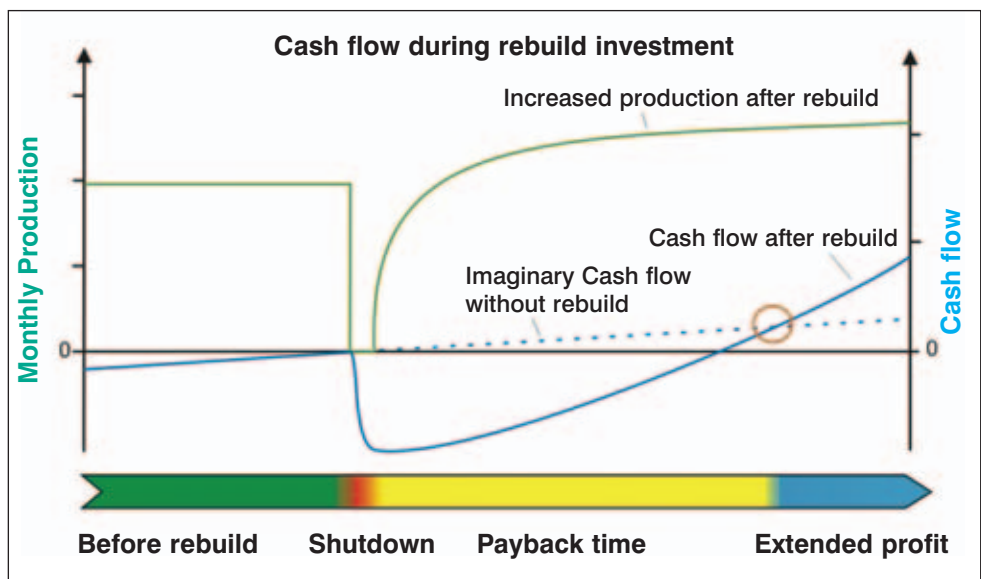


Figure 1: A targeted rebuild with a steep startup curve offers increased cash flow opportunities with a short investment payback.

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Industry Update

Lancashire roll manufacturer

Phoenix Ironworks, a roll manufacturer with a history spanning 130 years, has appointed David Pepper as Commercial Director.

Mr Pepper has worked in the paper industry for some 16 years - selling Polymeric covers and associated products. He has a B.A. Hons from Sheffield Hallam, and has held a number of positions in the steel industry.

Phoenix operates from its factory in Littleborough in Lancashire where it can produce rolls up to 660 mm diameter and 6 meters in length.

The company is approved to ISO9001 and is planning for organic growth in its two main divisions and for new developments roll manufacturing and specialist fabrications.

www.phoenix-ironworks.co.uk
Tel: 01706 378102

CVC Capital Partners to acquire stakeholding in China

CVC Capital Partners, a major player in the European paper industry, is to move into the Chinese market with the acquisition of a major stakeholding in Shandong Chenming - a leading Chinese paper and board producer which is owned mainly by Shandong provincial government.

For the acquisition, CVC has entered a joint venture with Citigroup and formed CVC Asia Pacific. They are offering \$623 million for up to 1 billion shares which Shandong Chenming is offering in a private placement. The idea is to gain a major, 30% interest in the Chinese company.

The deal is subject to official clearance and the approval Shandong Chenming's shareholders.

CVC was a founder of the Kappa group

and is a stakeholder in the new Smurfit Kappa group. It controls Lecta of France, a producer of coated woodfree and specialty grades, and has interests in paper distribution in France and Iberia.

Shandong Chenming will put the proceeds of the placement towards its pulp project the development of 200,000ha eucalyptus plantations and a 700,000 tpa pulp mill in Zhangjiang, Guangdong province.

The pulp project was originally set up with UPM Kymmene, but the Finnish company withdrew in late 2004 following feasibility studies which indicated the pulpwood supply was uncertain and the price too high for a profitable pulp mill. Shandong Chenming took up the project in 2005.

Planning permission for Ecco's UK newsprint project

Ecco Newsprint has received planning permission from the Teeside authorities to build a new newsprint plant at Wilton in the northeast of the UK.

Ecco is a UK start-up company, formed by pulp and paper industry experts to develop the Wilton project. It has the support of Tees Valley Regeneration which is promoting the area as site for papermaking.

The site of the proposed mill is in the Redcar area, the general location of the 600,000 tpy board mill which St Regis has been mulling over for several years. The area offers "uninterruptable power, steam and water on the scale needed for a modern paper plant." It is also well placed to secure the recovered paper which will feed the mill.

- Ecco has launched feasibility studies, which, if successful, will be followed by
- The formal financing stage, which involves the raising of some £290 million from a syndicate of banks and private investors.
 - A project timetable. If all goes well, the Wilton mill could 'be shipping a saleable product from the start of 2008'.
 - Capacity plans - initial reports suggest that the company is planning a 300,000 tpy mill.

The application to the Redcar and Cleveland Council outlines plans for an electricity sub-station.

UK Recycled Newsprint Capacity

400 000 tpy:	Aylesford Newsprint in Kent Owned by SCA and Mondi 400
230 000 tpy:	Bridgewater Paper at the Ellesmere Port Mill Owned by Abitibi-Consolidated
470 000 tpy:	Shotton Paper in North Wales Owned by UPM-Kymmene

Figure 1: The UK consumes some 2.4 million tpy of newsprint of which 1.3 million tonnes is imported

Grovehurst refurbishes water tower at Kemsley Mill

The Water Tower at Kemsley Paper Mill in Kent has been refurbished by Grovehurst Energy and a phased programme of corrosion protection and refurbishment to the steel pipe bridges is underway.

The work is being carried out by Stonbury, who have repaired the leaking bowl of the Tower without disrupting the water supply to the two mills of M-real and St.Regis Paper.

Built in the 1930's the tower is a reinforced concrete structure which stands over 120ft tall on the Sittingbourne site. Its coating and concrete substrate had been

degraded by weathering and the continuous condensation of steam from the mills.

The coating had become brittle and flaked and the steel reinforcement had corroded causing large areas of spalled concrete. In fact, surveys showed that the concrete covering was very low and there were high levels of carbonation.

Stonbury effected a BBA approved repair which involved:

- The removal of the external coating by open grit blasting.
- The break out of loose and defective concrete.
- The exposed steel reinforcement was cleaned and treated.
- Repairs with Polymer modified cementitious mortars.
- The remaining blowholes and surface defects were filled prior to the application of a fairing coat and finally an elastomeric anti carbonation coating.

Signs of leakage from the Tower bowl

Continuity of water supply and of paper production was a key consideration when the bowl of the Tower showed signs of leakage, Stonbury utilized the bowl - with its internal and outer tank to achieve this.

A new access was formed in the roof and the internal lining to the outer tank was removed. The concrete was repaired and waterproofed with a liquid elastomeric membrane. Great care was exercised to avoid any contamination to the water supply.

Finally waterproofing to the roof, cleaning and chlorination of the tank completed a successful refurbishment.



The Sittingbourne water tower was refurbished without disrupting the water supply to the M-real and St Regis mills. The tower supplies process water and water for the fir sprinklers.

Interim Management Service

Page Overton, a provider of Interim Management Services to the paper industry, has moved to a new Manchester office in Princess St from Deansgate. The new address is 40 Princess St, Manchester M1 6DE. Tel: 0161 234 0131.

Mark Thompson has joined the company as an Associate Consultant with responsibility for Wales, the South West, and the Tissue Industry. He has spent his entire career in the paper and packaging industries with St Regis, Bibby Paper, and most recently, Georgia Pacific.

Page Overton has launched a new Service. From 1st June, all clients on a retained search or Interim management package, will have a no cost option of full on-line profiling of all short listed candidates.

This includes a behavioural profile, role profile benchmarking, a competency based interview questionnaire, plus a candidate report, which will be included in addition to the existing personal assessment.

The company's Email address remains the same at enquiries@pageoverton.co.uk



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Metso management changes

Metso's Executive Team and their areas of responsibility will change as follows as of 1 August 2006:

The Fibre Business Line will form a separate business area which will be integrated with Aker Kvaerner's Pulping and Power units when the acquisition has been completed.

Bertel Langenskiöld, currently President of Metso Minerals, is to head the businesses and the integration planning.

As of April 1, 2007, Langenskiöld will become President of Metso Paper, and the Fibre and Power businesses will become part of Metso Paper.

The current President of Metso, Risto Hautamäki, will retire in the beginning of 2008, but continue to work for Metso till the

end of the year as Senior Executive, responsible for key account projects in the pulp and paper industry.

Matti Kähkönen has been appointed President of Metso Minerals. He is currently President of Metso Automation.

Pasi Laine has been appointed President of Metso Automation. He is currently President of Metso Automation's Field Systems business line.

Vesa Kainu, President of Metso Ventures, and Olli Vaartimo, Executive Vice President of Metso, will continue in their current areas of responsibility.

All of these will be members of Metso Executive Team and report to Jorma Eloranta, President and CEO of Metso and chairman of the Executive Team.

Management changes at Mondi Business Paper

Eliasz Amar is to become the new MD of Mondi Business Paper in Slovakia when Otto Pichler moves to South Africa.

Mr Amar is currently Finance Director of MBP Hungary and has held the same position at Hadera in Israel.

Otto Pichler will become MD of South Africa on the retirement of John Barton. Mr Pichler has been the MD of the Ružomberok Mill in Slovakia since January 2003 and has been a major driving force behind the success of this operation.

In his new position, Mr Pichler "will be focussing on increasing operational efficiencies, driving transformation and developing a flexible and competitive forest products organisation", according to Günther Hassler, CEO of MBP.

John Barton, MD of MBP South Africa is taking early retirement at the end of June 2006. He will continue to support the Mondi group in a non-executive role as deputy chairman on the South African board.

New Sales Director at BIM Finland

BIM, a supplier of advanced surface treatments, has appointed Eerik Huikuri as Sales Director for Finland.

Mr Huikuri (M.Sc.) comes from UPM Kuusankoski mill, where he was Production

Development Manager. He 'will bring a strong customer understanding as he has worked with UPM for 12 years', says Janne Aaltio, MD BIM Finland.

Norske Skog appoints CEO and CFO

Norske Skog has appointed Christian Rynning-Tønnesen (46) as president and CEO. He takes over at basic salary of NOK 3.6 million a year plus a bonus agreement which is worth a maximum of half a year's pay. He has also been granted 60,000 synthetic options which are exercisable during the first half of 2009.

Mr Rynning-Tønnesen moved to Norske Skog last year from Statkraft, the state-owned power generator where he was deputy CEO. He resigned as CFO of Norske Skog earlier

this year to become chief executive of Agder Energi, but had not yet taken up this post.

He holds an engineering degree from the Norwegian Institute of Technology (NTH) and has worked for McKinsey and for Esso Norge.

Andreas Enger (43) is to join Norske Skog the new CFO at a time to be agreed later. He comes from Midelfart Holding and has also worked for Petroleum Geo-Services and McKinsey. He has an engineering degree from NTH and an MBA from INSEAD.

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Machinery and Systems from Finland	West Yorkshire	Jukka Tamminen-Jackson	07766 462783	jtamminen@aol.com
AUTOMATED SPRAYING AND CONTROL				
Spraying Systems Ltd	Farnham, Surrey	Rowland Bailey	01252 727200	info@spray-uk.co.uk
BARRIER COATINGS				
GBC (Speciality Chemicals)	Oxford	Adrian Iley	01608 813088	gbcspecs@enablis.co.uk
BIOCIDES				
Kolb Distribution	Lancashire	Malcolm Austin	07720 287460	malcolm.austin@kolb.ch
BLADE HOLDERS, COATING & CREPING				
BTG	North Harrow	Andrew Griffiths	020 8515 6050	andrew.griffiths@btg.com
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BLADES, COATING, CREPING AND PRINTING				
BTG	North Harrow	Andrew Griffiths	020 8515 6050	andrew.griffiths@btg.com
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CHARGE MONITORING CONTROL WET END				
BTG	North Harrow	John Munday	020 8515 6050	uksales@btg.com
CHUCKS				
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COATING CONSULTANTS				
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COATING EQUIPMENT & MATERIALS				
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COATING SYSTEMS				
BTG	North Harrow	Andrew Griffiths	020 8515 6050	andrew.griffiths@btg.com
CONDITION MONITORING				
Monitran Ltd	Buckinghamshire	Suzanne Pearl	01494 816569	suzanne.pearl@monitran.co.uk
CONSISTENCY AND REFINER CONTROL				
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CONTRACT RESEARCH				
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CONVERTING MACHINES				
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COUPLINGS				
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CRANES				
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DEFOAMERS				
Kolb Distribution	Lancashire	Malcolm Austin	07720 287460	malcolm.austin@kolb.ch
DE-INKING CHEMICALS				
Kolb Distribution	Lancashire	Malcolm Austin	07720 287460	malcolm.austin@kolb.ch
Stephenson Recycling Chemicals	Bradford	Ramesh Patel	01274 723811	src@stephensongroup.co.uk
DOCTOR BLADES				
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DRYING CYLINDER SERVICES				
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DRYING CYLINDERS				
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DRYING HOODS & VENTILATION				
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DYESTUFFS				
Albion Colours	Halifax	David McCarthy	01422 358431	David.McCarthy@albionchemicals.co.uk
EFFLUENT TREATMENT				
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END OF LINE PACKAGING SYSTEMS				
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ENGINEERING SERVICES				
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FIBRE RECOVERY EQUIPMENT				
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FILTRATION				
Premier Filtration	High Wycombe	Chris Smith	01628 527704	premier@filt.fsnet.co.uk
FILTRATION SYSTEMS WATER				
John Crane UK Ltd	Manchester	Gary Webb	07711 650660	gary.webb@johncranemcr.co.uk
FLAME RETARDANTS				
Mare Paper Chemicals Group	Luton	Mitch Cook	01582 811900	Mitch.Cook@maregroup.co.uk
FREIGHT FORWARDING				
ALS (Freight Management) Ltd	Netherlands	Richard Vellekoop	+31 168 329850	richard.vellekoop@abnormal-loads.com
INFRARED DRYERS				
Compact Engineering	Thirsk	Tim Klemz	01845 525356	apollo@compact.co.uk
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INSTALLATION & ALIGNMENT SERVICES				
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LUBRICATION MANAGEMENT				
ChevronTexaco Global Lubricants	Staffordshire	Mick Doxford	020 7719 2227	mickdoxford@chevrontexaco.com
LUBRICATION SYSTEMS (CENTRALISED). DESIGN & INSTALL				
Harrison Lubrication	Bolton	Phil Vause	01204 691352	sales@hle.co.uk
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MACHINERY AND SYSTEMS FROM FINLAND				
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MACHINERY SAFETY & INSPECTIONS				
Laidler Associates	Teesside	Derek Coulson	08700 111375	enquire@laidler.co.uk
MEASURING INSTRUMENTS				
Invista	Aldershot	John Middleton	01276 691030	john.middleton@ivapap.co.uk
MILLWIDE SYSTEMS				
Applied Software Control (A.S.C.)	Aberdeen	David Capel	01224 643792	d.capel@ascman.co.uk
PACKAGING MATERIALS, MACHINES AND SYSTEMS				
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PAPER, TISSUE & BOARD MACHINES				
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PEARL LUSTRE PIGMENTS				
Merck Chemicals Ltd	Poole	Stephen Harpham	01202 785313	stephen.harpham@merckscld.co.uk
PIGMENTS				
Clariant	Leeds	Louise Barker	0113 239 8265	louise.barker@clariant.com
Sun Chemical	Milton Keynes	Ian Knowles	0161 443 1174	ian.knowles@eu.sunchem.com
PILOT PLANT FACILITIES				
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PROJECT ENGINEERING/CONSULTANCY				
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QUALITY CONTROL INSTRUMENTS				
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QUALITY INFORMATION SYSTEMS				
QISoft Limited	Leyland	Tim Perris	01772 641133	info@qisoft.com
RAW WATER TREATMENT				
Elga Process Waters	High Wycombe	Jeremy Wakeham	01494 887555	jeremy.wakeham@veoliawater.com
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REEL & PALLET WRAPPING SYSTEMS				
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REEL STANDS				
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ROTARY JOINTS AND SYPHONS				
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SEALS				
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SIZING				
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SLITTING & CUTTING EQUIPMENT				
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STEAM AND CONDENSATE SYSTEMS				
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STICKIES CONTROL				
Kolb Distribution	Lancashire	Malcolm Austin	07720 287460	malcolm.austin@kolb.ch
STOCK CHEST CLEANING				
Spraying Systems Ltd	Farnham, Surrey	Rowland Bailey	01252 727200	info@spray-uk.co.uk
STOCK PREPARATION				
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Voith Paper Fibre Systems	Manchester	Darryl Holt	0161 655 2907	darryl.holt@voith.com
John Wilkie - Hett GmbH	Perthshire	John Wilkie	01764 685267	WilkieMaryfield@aol.com
STRETCH FILMS AND WRAPPING MACHINES				
Machinery and Systems from Finland	West Yorkshire	Jukka Tamminen-Jackson	07766 462783	jtamminen@aol.com
STROBOSCOPES				
Euroto Ltd	Bolton	Tony Aspinall	01204 665050	sales@euroto.co.uk
SYPHON SYSTEMS				
Kadant Johnson Systems International	West Yorkshire	David Moss	01943 607550	david.moss@kadantjohnson.co.uk
TESTING AND ANALYTICAL SERVICES				
University of Manchester	Manchester	Bob Wilde	0161 306 3904	r.wilde@umist.ac.uk
THERMAL SPRAY/METAL SPRAY COATING SERVICES				
Bender Machine Services	Rossendale	Steven Withers	01706 225521	swithers@bendermachine.com
TRAINING				
Paper Classroom	Bolton	Steve Mann	07780 614148	steve@paperclassroom.com
PITA Trainers	Bury	John Clewley	0161 764 5858	info@pita.co.uk
University of Manchester	Manchester	Bob Wilde	0161 306 3904	r.wilde@umist.ac.uk
USED RECONDITIONED MACHINERY				
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VACUUM PUMPS & SYSTEMS				
Flowtech Pumps	Manchester	Ian Pendleton	0161 794 8038	ipendleton@pumpgroup.co.uk
Gardner Denver Nash UK Ltd	Winsford	Mark Roughsedge	01606 542400	mark.roughsedge@gb.gardnerdenver.com
VALUATION SERVICES				
John Wilkie Papermill Services Ltd	Perthshire	John Wilkie	01764 685267	WilkieMaryfield@aol.com
VALVES				
Lohse GmbH	Croydon	Kevin Bracken	020 8667 3013	kevin.bracken@voith.com
VIBRATION EQUIPMENT				
Monitran Ltd	Buckinghamshire	Suzanne Pearl	01494 816569	suzanne.pearl@monitran.co.uk
WASTE TRIM REMOVAL SYSTEMS				
Jarshire Ltd	Slough	David Jobson	01753 825122	sales@jarshire.co.uk
WATER CLARIFICATION				
Jarshire Ltd	Slough	David Jobson	01753 825122	sales@jarshire.co.uk
John Wilkie Papermill Services Ltd	Perthshire	John Wilkie	01764 685267	WilkieMaryfield@aol.com
KWI (UK) Ltd	Flintshire	Phil Woollen	01352 700224	office-uk@kwi-intl.com
WATER RECOVERY				
KWI (UK) Ltd	Flintshire	Phil Woollen	01352 700224	office-uk@kwi-intl.com
WET/DRY STRENGTH RESINS				
Mare Paper Chemicals Group	Luton	Mitch Cook	01582 811900	mitch.cook@maregroup.co.uk
WIRE AND FELT CLEANERS				
Kolb Distribution	Lancashire	Malcolm Austin	07720 287460	malcolm.austin@kolb.ch
WRAPPING EQUIPMENT				
Machinery and Systems from Finland	West Yorkshire	Jukka Tamminen-Jackson	07766 462783	jtamminen@aol.com
YANKEE COATING CHEMICALS				
Petrofer UK	Telford	Chris Ziemer	01952 580100	chris@ziemer.fsnet.co.uk

Installations

Mill	Supplier	Equipment review
Abhishek Industries Barnala Mill Punjab Province India	Allimand, France	A new 5.2 m P&W machine with a width of 5.2 m, a speed of 900 mpm and an output of 100,000 tpy. Of surface sized copier and other value added grades. The new PM, which will start-up in 2007, will boost the mill's output to 160,000 tpy. Includes the PM and auxiliaries mechanical drive, hood, steam and condensate system, central lube oil system - an A-sizer; a the complete set of vacuum pumps and a winder equipped with an automatic slitter positioning device. www.allimand.co.uk
Ahlstrom Louveira Mill Brazil	TietoEnator and Ahlstrom	The Optimill information system which was fully integrated to SAP. Optimill combines bespoke elements for Ahlstrom with modules from the TietoEnator Integrated Paper Solution (TIPS). It includes solutions for sales, production execution, and quality management. Optimill, which is already in use at 17 Ahlstrom mills worldwide, enables the company to unify and optimize business processes.
Amcor Packaging Fairfield Mill Australia	Metso Paper	A maintenance contract which covers all maintenance-related activities and services across the entire 130,000 tpy mill which produces recycled and white liner, fluting and plasterboard liner. The agreement was signed on 1 May 2006 for 3 one-year terms. The management and procurement of materials and external services is also included. Metso has formed an alliance with the Skilled Group, Australia's largest technical workforce provider. SG will provide personnel for both daily maintenance activities and shutdown works.
Andhra Pradesh Pper Mills Rajahmundry Mill Andhra Pradesh State	Voith Paper, Germany	The rebuild of PM3 to increase capacity by 10,500 tonnes to 40,500 tpy in 1Q 2007. Includes a new diffuser block in the headbox; a Duoformer for the wire section; a new size press; four new dryers and pocket ventilation. Also includes the upgrade of the steam and condensate system and the rebuild of the calender.
	Andritz, Austria	The start-up this month of the 181,500 tpy, ECF bleached pulp line. Some 200 tpd of wet lap pulp will be shipped to APPM's CP Kadiyam Mill just 18km away. The upgrades at Rajahmundry and Kadiyam are part of a \$145 million investment programme.
Andhra Pradesh Pper Mills CP Kadiyam Mill Andhra Pradesh State	Voith Paper	The rebuild of PM 3, to increase capacity from 42,000-66,000 tpy and to convert the machine to swing production of both newsprint and P&W grades. Modifications to the wire and press sections will be carried out in 1Q 2007. The mill will shut down its rice, straw pulp and DIP lines following the start-up of a new 181,500 tpy ECF bleached pulp line at the nearby Rajahmundry Mill of APPM. Some 200 tpd of wet lap pulp will be supplied to the CP mill. The start-up of the new pulp line will also enable the company to shut its rice straw pulp and deinked pulp lines at the CP facility.
Anhui Shanying Maanshan Mill Anhui Province China	Metso Paper, and Metso Paper (China)	A €50 million order for a new PM will come on stream in 1Q 2008. The new PM2 will have a wire width of 6,050 mm, a design speed of 1,600 mpm and a capacity of 180,000 tonnes. The order embraces a complete OptiConcept machine from headbox to reel, and various auxiliary equipment. With a capacity of 500,000 tpy of kraftliner, Anhui Shanying is the biggest paper and board producer in the Anhui province which is some 300 km west of Shanghai.
	Metso Automation	Machine automation and quality control systems as well as the process control systems for the PM and the pulping line.
APP Indah Kiat APP IK Pulp & Paper Mill Indonesia	PMP Group Poland	A new headbox for the bottom wire of PM4 which produces packaging grades. The hydraulic Intelli-Jet VTM headbox comes with a Consistency Profiling system. Made entirely of stainless steel it has a pondside width of 4900 mm and a design speed of 800 mpm. Start-up in March 2007.
Century Pulp and Paper Lalkua Mill	Voith Paper	A 200 tpd deinking system which will process recovered office paper for the production P&W grades. The 2 loop system will have a VarioSplit washer for de-ashing in the 1st loop and, in the 2nd loop, a kneading disperger which will reduce dirt specks and enhance the specific volume of the end product. The engineering will be based on the EcoProcess concept which provides a significant reduction in energy requirements compared with conventional deinking processes.
Dalum Papir Naestved DIP Plant Denmark	Voith Paper	A high-efficiency disperger which will improve the optical quality of the deinked pulp. The project, which will be completed this month, is the 2nd upgrade of the stock prep plant in two years. The 1st upgrade embraced the MC screening system which was equipped with MultiFoil rotors and C-bar screen baskets. The DIP is used for the production of high-grade coated and uncoated graphic papers in Dalum's Odense Mill.

Mill	Supplier	Equipment review
Dong Il Paper Mfg. Co Ansan Mill Korea	Metso Paper	The rebuild of the 5m wide PM 1 to a design speed of 1,150 mpm and an output of 400,000 tpy of recycled containerboard. At Wolsan, located in Wolsan. Includes a new Symbelt shoe press. Recommissioning in Summer 2007.
	Metso Automation	The upgrade of the control systems to metsoDNA. The mill produces fluting and linerboard.
Dong Il Paper Mfg. Co Wolsan Mill Korea	Metso Paper	The rebuild of the 4.4 m wide PM to a design speed of 1,000 mpm and a capacity of some 250,000 tpy of recycled containerboard. Includes the extension and upgrade of the Condebelt dryer which was installed in 1999; a new SymFlo headbox and a ValHard calender. Start-up in Summer 2007.
	Metso Automation	The upgrade of the control system to a Damatic XD. The mill produces fluting and linerboard.
Emami Paper Balgopalpur Mill India	Voith Paper	A 2-loop deinking system which will produce 300 tpd of DIP. The latest flotation and screening technology is designed to remove printing inks and stickies with minimum specific energy consumption and negligible fibre losses. Includes EcoMizer cleaning and C-bar fine screening. The engineering will be based on the EcoProcess concept which provides a significant reduction in energy requirements compared with conventional deinking processes.
Fabryka Papieru Myszkow Myszkow Mill Poland	PMP Group Poland	A new headbox for PM6, a 60,000 tpy machine which produces newsprint and P&W grades. It will be installed in October. 2006. The company has a turnover of \$25 million and 50% of total output is sold in Poland. The rest is exported to Europe, Ukraine, Africa and the Far East.
	Metso Paper	The two-stage rebuild of the PM 6 line which produces . Includes: a new 200 tpd DIP plant, a rebuild of the wire part and a new quality control system Phase 1 will take place this October when the following parts will be upgraded: the dewatering table, pulp cleaning and screening and the winder drive. In 2007-2008. the project will include: a new former, roll wrapping line and an overhaul of 4 MW boiler, the DIP line. The rebuild will increase speed from 565 to 850 mpm and boost capacity to 95,000 tpy.
ICT-Poland Kostrzyn Mill Poland	Voith Paper Rolls	The regrind of the Yankee cylinder of PM11 using the the innovative VRG grinding process was launched in early 2005. Virtual Reference Grinding replaces the conventional grinding bed with a laser measuring and control system. It measures the cylinder, calculates the necessary local removal of grinding material and subsequently controls the two grinding heads. The process provides optimal grinding results with a minimum removal of metal and downtime is reduced by up to 30%.
ITC Bhadrachalam Mill Andhra Pradesh State India	Metso Paper	A new 120,000 tpy ECF bleached hardwood pulp line which will start up at the end of 2007. Includes oxygen delignification technology and Ozone will be used for the first bleaching stage. The pulp wood will be supplied by local smallholders who have planted some 40,000 ha with hardwood species under an ITC forestry scheme. ITC aims to extend the plantations to 100,000 ha by 2010. Bhadrachalam is preparing to receive a 2nd hand, Scottish machine which is to start-up in early 2008. The PM was acquired from the Corpach Mill of ArjoWiggins which closed last Autumn. The 75,000 tpy PM will be rebuilt to a capacity of 100,000 tpy and will produce uncoated woodfree grades - the contractor is to be announced later.
Japan Pulp and Paper Taiho Paper Kawabe	Kawabe Biomass Electric Power Generation	A biomass power plant will be started-up in April 2007 by the joint venture comprising JPP (50%), Taiho (40%) and Tomen Techno Solutions (10%). The latter trades paper, board and recovered paper, as well as machinery and tools in Japan. Kawabe BEPG. The plant will generate steam and electricity from waste wood, enabling the 232,000 tpy Taiho containerboard mill to reduce consumption of heavy oil and cut CO ₂ emissions by approximately 43,000 tpy.
Klabin Monte Alegre Pulp Mill Telémaco Borba, Paraná Brazil	Kvaerner Pulping Norway	A \$25m EPC contract which includes: the upgrade of the cooking and white liquor plant and a new lime kiln. The capacity of the cooking plant will be increased by nearly 30%, to 2,200 tpd of pulp Start-up in Sept 2007. The rebuild is part of an expansion project after which the integrated mill will produce 1.1 million tpy of paper and board from eucalyptus and pine.
Klabin Monte Alegre Pulp Mill Telémaco Borba, Paraná Brazil	Voith Paper	A new 7.3m machine (ww) which will produce Liquid Packaging Board, Carrier and Folding Boxboard in the 170-390 g/m ² range. This is the first BM project worldwide to be designed primarily for LPB. With a design speed of 1,000 m/min, the new BM will have an output of 1,100 tpd. The contract includes: the stock prep and approach flow systems; the BM with winder, roll transport and wrapping systems; ancillary and electrical equipment. Start-up is scheduled for September 2007.

Mill	Supplier	Equipment review
	Voith Paper	A €50 million EPC contract for the complete CTMP plant for the new board making line which will start-up in Autumn 2007. The CTMP plant will produce 140,000 tpy of unbleached eucalyptus pulp for the production of LPB and other grades. The CTMP plant will be among the first in the world to use eucalyptus wood as its raw material. Because of its favourable pulp properties and high yield, eucalyptus CTMP is expected to become a major papermaking fibre in South America.
Klinge Papierwerke Weener Mill East Friesland Germany	Voith Paper	The extension of the pre-drying group of PM2, a 5.49 m machine (ww) which produces 220,000 tpy of corrugated base of 90-180 g/m ² . Design speed is 1,200 mpm and capacity is dryer limited. The order includes the 1st commercial application of the new BoostDryer. It will increase PM2's drying capacity by up to 15%, while enhancing surface smoothness. BoostDryer comprises a steam-heated cylinder which is designed to enable higher heat flows. A water-cooled pressure hood presses the web against the dryer cylinder to enhance contact and increase drying efficiency. The pressing action also results in high strength values and a smooth surface.
Lee & Man Paper China	Kadant Black Clawson Inc	A \$10 million order for an advanced stock-prep system, which will process OCC for the production of packaging grades. Lee & Man is China's leading linerboard producer.
M-real Alizay Mill France	Metso Paper	The upgrade of the old BelBaie former on PM1 to a BelBaie V forming section - the first ever Metso BelBaie V for woodfree grades. The aim was to improve paper quality and machine runnability. The 9.5 m PM produces 300,000 tpy of business and office grades of 70 to 90 g/m ² . The mill, also produces 300,000 tpy of mixed hardwood kraft pulp.
Metsä Tissue Tento Zilina Mill Slovakia	Toscotec, Italy	The upgrade of PM 1 with the installation of a new crescent former, press and headbox. Part of a project to increase speed from 1600 to 2000 mpm and capacity to 30,000 tpy - from 25,000 tonnes. The rebuild also included the modification of the pope reel and tail threading system.
	Milltech	A new machine hood for PM1. The mill has another machine, the 50,000 tpy PM2.
Modern Karton Corlu Mill Turkey	Metso Paper	A new 400,000 tpy recycled containerboard machine which is scheduled to start-up in Sept 2007. The 8.6 m PM4 has a design speed of 1800 mpm and will produce testliner and fluting of 70-130 g/m ² . Also includes an OCC line and a winder. The PM4 line is part of a \$360 million investment programme which includes a new CHP cogeneration plant and the expansion of wastewater treatment. There are also plans to rebuild PM3 to increase capacity by 100,000 tonnes to 300,000 tpy. PMs 1 and 2, produce a total of 100,000 tpy of testliner and recycled fluting.
Nippon Paper Ishinomaki Mill Northeast Honshu Japan	Metso Paper	Most of the technology for the new 350,000 tpy papermaking line which is due to start-up in September 2007. The new PM6 line, which will rely largely on OptiConcept technology, will produce both fine paper and LWC grades in a basis weight range of 51 to 79 g/m ² . With a wire width of 9.45 m and a design speed of 1,800 mpm. The order also includes finishing technology, air systems and automation. The mill produces 900,000 tpy on 11 paper machines.
	Voith Paper IHI Joint Venture: Voith and IHI of Japan	Key technology for the new PM6 line. Includes the Varidwell coater stations, originally developed by IHI and the Tandem NipcoFlex press. Ishinomaki Mill produces 900,000 tpy on 11 PMs. The Nippon Group produces approx. 8 million tpy of paper and board. It has 23 mills in Japan, 2 in the U.S.A., 3 in China and 1 in Finland.
	Andritz Kusters, Europe Yodogawa, Japan	Eleven Multi HV axles for the Multi-Nip calender of the new PM6. Seven will be delivered by January 2007, and four reserve axles in May. With a diameter of 990 mm and a working width of 8,850 mm, the rolls will be fitted with the axles by the local Yodogawa the local licensee and integrated into the calender.
Nuqul Group Al Snobar Mill Amman Jordan	Metso Paper	A 5.5 m Advantage DCT 200 tissue machine which is scheduled to start-up in 4Q 2007. Includes the TM with AirCap and ventilation equipment, a multilayering headbox; sheet transfer and stabilizing technology and a GluTurn-Up system. With an operating speed of 2,000 mpm, the TM will produce 54,000 tpy of facial, toilet and towel grades from virgin pulp. Tissue consumption in the Middle East has been growing by 25% during the past five years. Per capita consumption is low compared to Europe, but with a population base of 220 million the growth potential is large.
NWTC Neman Mill Kalingrad Russia	Voith Paper	PM9, a 2nd hand machine acquired in the UK, is starting up this month and will produce 60,000 tpy of uncoated woodfree paper. The project cost \$35 million. Neman now has 8 machines and a capacity of 150,000 tpy of uncoated woodfree paper, specialty paper and containerboard.
	Belekpul, Belarus	A new wastewater treatment plant which will start up in 1Q 2007, replacing a 60 year old facility. The new plant will treat wastewater from the mill and the township and will conform to the recommendations of the Helsinki Commission on the reduction of water pollutants. There are also plans to build a €2 million wastewater treatment plant at Kamennogorsk Mill in the Leningrad region on Russia. Work will start in 2008.

Mill	Supplier	Equipment review
Rama Newsprint Barbodhan Mill India	Voith Paper	The upgrade of the dekinning plant to a 2-loop system which will produce 250 tpd of DIP. The latest flotation and screening technology is designed to remove printing inks and stickies with minimum specific energy consumption and negligible fibre losses. Includes EcoMizer cleaning and C-bar fine screening. The engineering will be based on the EcoProcess concept which provides a significant reduction in energy requirements.
Shinmoorim Paper Jinju Mill Korea	Voith Paper	The rebuild of PM 2, a 4m machine (ww) which produces woodfree coating base and coated grades of 60 to 138 g/m ² . The aim is to increase speed and improve quality. Includes a new headbox with ModuleJet; a DuoShake and a DuoFormer; a SpeedSizer with infrared drying; the rebuild is a NipcoFlex Press; DuoStabilizers for the dryer section; a rebuild of the Pope reel; new tail threading equipment with vacuum conveyors at the speedsizer and the calender. Also includes a machine control system (MCS) and a ModuleSteam unit for the control of moisture profile.
Sofidel Delipapier Arneburg Mill Saxony-Anhalt Germany	Metso Paper	A 5.5m wide tissue machine for the new mill. It will produce 60,000 tpy from 100% virgin pulp at an operating speed of 2,000 m/min. Start-up is scheduled for mid-September.
	Fabio Perini	The converting equipment for the new tissue mill which has five converting lines - three for toilet paper, one for kitchen rolls and one for handkerchiefs.
Sofidel UK Intertissue Mill Baglan Energy Park Port Talbot	Metso Paper	A 5.4 m wide PM, which is scheduled to start-up in September. The PM will produce 60,000 tpy of towel and toilet tissue.
	Fabio Perini, Italy Winkler+Dunnebler, Germany	Five converting lines for the new tissue mill. They will produce 600 million rolls of kitchen towels, toilet paper, handkerchiefs and napkins.
Sun Paper Yanzhou Mill I Shandong Province China	Voith Paper	A 250,000 tpy fine paper machine, which will start-up in 1Q 2007. The new PM21 will have a wire width of 5.4 m and an operating speed of 1,300 mpm. It will produce copier, offset and coating base paper of for coating of 60-180 gsm.
	Andritz	A pulp refining line supply PM 21, It will also have a capacity of 250,000 tonnes/yr. Sun and International Paper are forming a joint venture to produce liquid packaging board. IP will have a 50% interest in Yanzhou's two cartonboard machines, PMs 17 and 18, which have a combined capacity of 425,000 tpy. As part of the deal, a new 300,000 tpy LPB machine is to start-up in late 2007.
Suzano Papel e Celulose Mucuri Pulp Mill Bahia Brazil	Eka Chemicals do Brazil Akzo Nobel Group Stockvik Sweden	A 45 tpd dioxide plant along with a 15 year contract for the supply of sodium chlorate. Start-up in 2007. The mill produces 700,000 tpy of eucalyptus pulp and 270,000 tpy of P&Ws and is building another pulp line which will increase capacity to 1.25 million tpy of ECF pulp. The new plant will be run by the mill with remote-monitoring from Eka's Brazilian factory, supported by the operations centre in Stockvik, Sweden.
UPM Kaipola Mill	Metso Paper	A rebuild to improve quality and increase the capacity of PM 4 by 10,000 tpy to 170,000 tpy of catalogue paper. Part of a €40 million investment project which also embraces PMs, chip handling and power plant. Also includes new finishing equipment for super jumbo reels and a new rewinder for PM 6, a 300,000 tpy, LWC machine.
	Kvaerner Power	An upgrade of the solid fuel capacity of the power plant's main boiler and a new biofuel crushing line. The work will take place in 3Q 2006.
UPM Kymmene Jamsankoski Mill Finland	Metso Paper	A €20m rebuild of PM4 which will be completed in 2Q 2007. The rebuild will convert eh 5.4 m machine from coated mechanical grades to peosuxw high-quality coated label base. Includes a new coating station with a coating colour supply system and air dryers; a new on-line calender and wet end runnability improvements.
	Metso Automation	PM controls, process controls and quality measurements, controls and profilers. The existing system will be upgraded to metsoDNA technology. Jämsänkoski, had 4 PMs and a total capacity of 870,000 tpy of SC, MFC and label papers.
	Vaahto, Finland	A €2 million order for stock prep equipment for 2 paper machines. Includes new pulpers and conveyors with auxiliary equipment, as well as new undermachine pulpers for PM4. Installation, training and start-up services are essential parts of the supply. Delivery will take place during 1Q and 2Q 2007.
Yanzhou Zhongtian Paper Industries Sun Paper Group China	Voith Paper	The supply of the new PM 21 which will start-up in the first half of 2007. The 5.4 m PM will run at 1300 mpm and produce 780 tpd of copier, coating base and offset grades. PM 21 will be equipped with the latest technology based on the One Platform Concept, including a PM wide machine control system. Sun Paper has a capacity of over 1.3 million tpy.

Coming Events

International symposium in Bratislava

An International Symposium on the “Challenges of Pulp and Papermaking Technology” will be held in Bratislava, the capital of Slovak Republic from 8 to 10 November 2006.

It is organised by The Pulp and Paper Industry Technical Association of the Czech and Slovak Republics (SPPC) and supported by EUCEPA. The programme will focus on global challenges such as

raw materials, recovered paper processing, new products and environmental protection.

Experts from 11 countries will present 3 keynote addresses and 23 papers. Ms. Theresa Presas, Managing Director CEPI will present the opening address.

The authors of keynotes are: Wulf Killman of the FAO, Rome; Professor Lothar Göttsching, Darmstadt, Germany; and Jan-Erik Eriksson of ÅF-Process Stockholm.

There will be a tour of Smurfit Kappa mill in Túrovo, South Slovakia, where the new sulphur-free Novacel semi-chemical pulping process is in operation.

Bratislava has an historic old town, a pleasant climate even in November. And surrounding vineyards. In November, the numerous vine cellars serve the new wines and goose specialities - all accompanied by gypsy music. www.challenges06.sk

Speciality & Technical Papers: a two day conference

A two day conference on Speciality & Technical Papers will be held from 11 to 12 July 2006 at The Edgewater Hotel, Madison, Wisconsin by Intertech - Pira.

The programme will focus on key business issues such as product mix strategies and strategies for evaluating and selling to i) smaller, niche markets and ii) bulk markets where there are paper buyers who might pay more for a slightly different grade.

It will cover emerging technologies for producing new grades and adding value to existing products - minerals, process chemistries and equipment.

The conference will bring together paper-makers, end users and suppliers of fibre, resin and equipment fibre. It will be accompanied by an exhibition featuring the latest process, material and equipment developments.

The first day: pre-conference seminar

On the morning of 11 July, there will be a pre-conference seminar: *Silicone Pressure Sensitive Release Coatings: A Review of the Technology and Markets*.

The main conference starts at 1.30 and will include the following presentations:

- How to Succeed with Specialty Papers: Jack Millar of Pira will discuss small speciality mills and larger semi-commodity mills which are struggling in markets in which there is not enough volume.
- Harnessing the Opportunities Offered by Emerging technologies: Dr Graham Moore of Pira will cover printed electronics, nanotechnology and intelligent packaging developments.
- The Influence of China on the Paper Industry by Pöyry Forest Industry Consulting.
- Specialty Papers and FDA Requirements For Food Packaging, by Naeem Mady of Ciba Specialty Chemicals.

- The impact of Regulatory Trends on Specialty Polymers for the Paper Industry by Dennis Butcher of Noveon.

Speciality Papers in the 3rd Millennium

The 2nd day of the conference will open with a keynote presentation on: *Specialty Papers in the New Millennium-Panacea or Pitfall*, by Robert H. Hamilton of Stirling Consulting.

He will be followed by presentations on Accountancy, the Role of Chemicals, New Technology and, possibly, the Use of Recycled Fibre in Specialty Papermaking. This session will include the following papers:

- Keeping Score - Using the Right Metrics: Joe Steiner of CFO Associates will discuss speciality and commodity Production models and the impact of metrics on behaviour and profitability.
- Paper Mill Cost Management: Richard Dow of P&P Management Services will describe software which provides cost transparency; evaluates and optimizes manufacturing costs; compares “should-be” and actual costs and runs complex “What If” scenarios in minutes.
- Using Synthetic Latex Binders to differentiate performance by David. M. Lee of Omnova Solutions.
- A Brief Overview of Unique Binder Applications in Specialty Papers by Ron Jones and John Tacca of Air Products Polymers.
- Specialty Talcs for Specialty Papers by Dr Peter Biza of Rio Tinto Minerals.
- Multi-ply HydroFormer: Opportunity for New Innovative Wet-Laid Products by Dr Klaus Afflerbach of Voith Paper.

Contact Intertech-Pira at Portland, Maine: +1 207 781 9630

LLimoge@intertechusa.com
www.intertechusa.com/sp



ENERGY EVENT late September 2006
see www.pita.co.uk for details

Fillers and Pigments

A two day conference on Fillers and Pigments in Paper Applications will be held from 28-29 September at the Wyndham Midtown Hotel in Atlanta, USA. It is organised by Intertech-Pira.

Case studies presented by leading paper mills will provide insights from end users including: Kruger, Weyerhaeuser, Abitibi Consolidated, BTG Americas; Harbor Paper Mill, and Catalyst Paper.

The programme will also cover:

- The market place and price projections.
- Interactions with the papermaking process - improving retention
- New developments including mill trial results for functional fillers
- Fillers and product performance

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ciarán.little@pira-international.com

2006 European Paper Recycling Conference in Barcelona

The 2006 European Paper Recycling Conference will be held in Barcelona at the Tryp Apolo Hotel from 25-26 September.

Organised by The Recycling Today Media Group of the USA, the Event will bring together both papermakers and their suppliers. The programme will cover current business and operational trends in both the European and international secondary fibre industry.

There will also be a display area where equipment and service providers will show the latest products and technology.

The following topics will be covered:

Europe's Place in the Recycling Universe: The panel will include experts from, Moore & Associates of the USA; Smurfit Kappa Group, Netherlands and Souiler, France.

The Opportunities and Limits of New Supply Sources: Panelists will discuss The Finnish Approach to Recovered Paper Collection and Growing Supply of Recovered Paper in Spain. They will include experts from Paperinkerays of Finland; the Spanish

Recovered Paper Association and Darmstadt University of Technology, Germany.

Retaining Quality in a Hectic Market: Experts from Pira International and Smurfit Kappa, Netherlands will discuss The Changing Print Market and Its Consequences for Deinked Fibre.

Meeting Recycling's Challenges: Panelists will include experts from Recycling Today, USA, CTP, France and Waraq, Saudi Arabia.

Export & Domestic Markets: The panelists will include experts from ACN Europe, The Netherlands and Sonoco Alcore, UK.

Mill Buying Roundtable Discussion: The Mill Buyer's Perspective will be presented by experts from, ASPAPEL, Spain, StoraEnso, Spain and Holmen Paper, Sweden.

More than 125 industry professionals from 16 different countries attended the 2005 conference. This year the conference is being supported by the Confederation of European Paper Industries and the Independent Waste Paper Processors Association; www.paperrecyclingeurope.com

Impact REACH on the Packaging Supply Chain

A two day conference on the Impact of the REACH Regulations on the Packaging Supply Chain will be held from 5-6 July, in Madrid at the Holiday Inn. The organiser is Pira International.

The EC proposals on the Registration, Evaluation and Authorisation of Chemicals is being examined by the European Parliament - the first reading is expected to take place this Autumn.

All parties - Commission, Parliament and Industry - are keen to find a balanced solution to the unresolved issues. The key issue

is how deliver health and environment improvements without jeopardising the competitiveness of European industry and SMEs in particular.

The overall cost of REACH to industry will be some €2.8bn - 5.2bn over the next 11 years, according to EU estimates. The conference programme will explore what this means for businesses and how they should plan for the future.

Contact Sophie Sipsma, Conference Manager on: Tel: 01372 802026; sophie.sipsma@pira-international.com

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Calendar of World Events

Date	Event	Venue	Organiser
July 2006			
19-20	Web Handling and Converting Seminar	Lexington, Kentucky USA	Seminars For Engineers Tel: +1 877 755 2272 info@SeminarsForEngineers.com www.SeminarsForEngineers.com
August 2006			
21-23	Decorative & Industrial Laminates Symposium 2006	Omni Hotel at CNN Center Atlanta, Georgia, USA	TAPPI: Tel: +1 770 209 7291; Fax: +1 770 446 6974; www.tappi.org
September 2006			
5-8	Pulp and Paper World China 2006	Westin Shanghai, China	Terrapinn Pte Ltd Tel: +65 6322 2748; Fax: +65 6226 3264 Wendy.mah@terrapinn.com www.terrapinn.com/2006/pulp
12-14	Recycling and Waste Management	NEC, Birmingham	RWM www.rwmexhibition.com
12-15	Chemical Technology of Papermaking PTS Symposium	PTS Munich, Germany	PTS: Tel: +49 89 12146 496 Fax: +49 89 12146 36; r.sangl@ptpaper.de www.cht-symposium.de
13-14	Web Handling and Converting Seminar	Atlanta, Georgia, USA	Seminars For Engineers: Tel: +1 877 755 2272 info@SeminarsForEngineers.com www.SeminarsForEngineers.com
15-18	NPTA Annual Convention 2006	Chicago, Illinois, USA	National Paper Trade Association Tel: +1 631 777 2223; Fax: +1 631 777 2224 www.gonpta.com
27-29	BAPH Annual Conference	Hotel Bretagne Saint-Omer, France	RodMorley@ukgateway.net Tel: 01795 534267
October 2006			
4-6	RISI North American Forest Products Conference	Seaport Boston Hotel, USA	RISI: Tel: +1 781 734 8936; Fax: +1 781 271 0337 events@risiinfo.com; www.risiinfo.com
10-13	International Pulp, Paper & Tissue Forum 2006	Tavrishesky Palace St. Petersburg, Russia	Adforum / Restec: Tel: +46 8 783 8000 Fax: +46 8 667 7509; jan.johansson@adforum.se www.ipptf.com
25-27	ForestXchange - new approaches in knowledge management	Catholic Academy of Freiburg Germany	FVA (Forest Research Institute) Tel: +49 761 4018 0; Fax: +49 761 4018 333 info@forestxchange.org www.forestxchange.org
30-31	BIR Convention	Sheraton Hotel & Towers Brussels, Belgium	BIR (Bureau of International Recycling) Tel: +32 2 627 5770; Fax: +32 2 627 5773 bir@bir.org; http://www.bir.org
November 2006			
1-2	WWEM 2006	Telford International Centre	WWEM Marcus Pattison; Tel: 01727 858 840
6-8	International Containerboard Conference	Chicago Marriott USA	RISI: events@risiinfo.com www.risiinfo.com/icc
8-10	Challenges of Pulp & Papermaking Technology	Bratislava, Slovakia	SPPC (Czech and Slovak Technical Assns) symposium.sppc@vupc.sk www.challenges06.sk
14-17	Smart Label Summit Europe 2006	Okura Hotel Amsterdam, Netherlands	Tarsus Group: Tel 020 8846 2737 bpiercy@labelsummit.com smarteurope.labelsummit.com
21-24	PAP-FOR Russia 2006	LenExpo Fairgrounds St. Petersburg, Russia	EJ Krause & Associates Tel 301-493-5500; Fax: 301-493-5705; info@ejkrause.com www.ejkrause.com/events/3706.html
28-30	European Paper Week	Sheraton Hotel & Towers Brussels, Belgium	CEPI: Tel +32 2 627 49 11 Fax: +32 2 646 81 37; mail@cepi.org; www.cepi.org
29-30	Web Handling and Converting Seminar	Chicago, Ill., United States	Seminars For Engineers Tel: +1 877 755 2272 info@SeminarsForEngineers.com www.SeminarsForEngineers.com

WHITELEY LIMITED

PRODUCTION MANAGER

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Applications and current CV to:

Philip Parkin
Human Resources Manager
Whiteley Ltd,
Pool-in-Wharfedale,
Otley,
West Yorkshire,
LS21 1RP

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We are looking to strengthen our South-East region with the recruitment of an



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Further information about Hercules and the Paper Technologies Division can be found at our website: www.herc.com.

To apply for this position please send your full CV and covering letter, containing current salary and benefits to:

K. Filius, HR Manager via email:
KFilius@Herc.com

**or via paper mail: Hercules Ltd, PO Box 5822,
2280 HV Rijswijk, The Netherlands.**