# PITA ANNUAL REVIEW

2017-2018

FORWARD

Paper Industry Technical Association
5 Frecheville Court,
Bury, Lancashire
BL9 0UF

# Annual Review 2017-2018

*Compiled by the PITA Office*

PITA
Paper Industry Technical Association

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**Paper Industry Technical Association**

# Annual Review

# 2017-2018

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# Outgoing Chairman's Message


*(Given at the PITA AGM, Romiley Board Mill near Stockport, 6 December 2017)*

This is my third annual report as Chairman of PITA. In each of the years I have been Chairman there have been issues and challenges that have impacted upon the industry and the Association. The year 2017 has been no different but some of the issues of earlier years, notably Brexit with its effect on Exchange Rates and the uncertainty facing all industry sectors as we move forwards, has continued to and will continue to dominate the UK and its economy.

Fortunately the papermaking sector seems to be coping better than many had expected. No closures have been announced in the last 12 months and the level of de-manning has reduced to a much slower rate. In fact 2017 has seen the reopening of Essity's Tawd mill in Skelmersdale, creating 40 new jobs.

Many suppliers' organisations have been successful in non-UK markets and it is hoped that post-Brexit business arrangements allow this to continue. Support for the UK has been highlighted recently by the opening of Axchem's new Technical Centre in Darwen.

**The Association**

PITA's business tends to run behind the issues affecting the industry and there has been inevitably some downturn in membership during the year, with 44 members lost (5 due to death). Fortunately some of that has been recovered with the addition of 28 new members.

Membership along with the *Paper Technology International* journal, training and other events are all key income sources for the Association. Obviously any downturn in the economic fortunes of the sector has an impact on the Association's financial performance. In addition other factors have come into play this year to adversely affect the bottom line:

- Exchange rate variations have impacted the value of our Advertising Income from European sources.
- A significant water leak in the PITA Office was a major setback that required the complete re-plumbing of the offices. Inevitably, this disrupted day to day operations, but 'business as usual' was maintained throughout and on a positive note provided the opportunity to refurbish the offices.

The Association's finances are under strain but PITA is overall in good shape through the efforts of its staff who have worked tirelessly in the face of a very challenging climate to keep all costs under control and to minimise overall losses. In fact, the Association managed to trade until November 2017 without calling on any of our reserves and we are now already receiving monies for 2018 subscriptions and, despite exchange rate issues, the income from European advertising sources is increasing.

**Highlights for 2017**

- *Paper Technology International* has reached out to a much wider pan-European audience and efforts are being made to ensure that this audience is retained post-Brexit. Four packed Magazines have been published, all with increased pagination, and the actual cost of journal production has been continuously reduced.
- Two e-Magazines (*PAPERmaking!*) have been published providing a medium for showcasing papers and case studies that might not have found a place in a hard copy magazine.
- Twelve *PITA Affairs* Newsletters have been published that keep Members 'up to date' on the latest developments in the Paper Sector.
- Five well attended Training Courses have taken place, including a sold out 'Fundamentals of Papermaking' course.
- The new PITA Website has continued to grow, with new resources being added nearly every month. Perhaps even more importantly it is now starting to generate some income in its own right.

Aside from these activities, PITA is maintaining an important function for the industry and its Members by:

- Sitting alongside the CPI and playing an important role in negotiating and formulating the '2050 Pulp & Paper Strategic Roadmap'. PITA has now been tasked in fulfilling several of the commitments contained in the plan.
- Cooperating intensely with the CPI to develop a single Industrial Strategy Document covering a sector made up of diverse operations.
- Taking key roles in the development of CEN and ISO Standards that will affect all paper producers / convertors to some degree.

**Future plans**

PITA and its Board have continued to discuss and evaluate (via the Development Forum initiative) the future direction and make-up of the Association in the light of the changing world in which the Association and its Member find themselves. As a part of these deliberations, discussions are already at an advanced stage to let the under-utilised parts of the PITA Office with a view to generate additional income for the Association in 2018.

In an attempt to alleviate hurdles created by time pressures on many mill-based Members that prevent or make attendance at PITA Industry Events a serious challenge, PITA is investigating / evaluating the use of Webinar style events.

Three were entirely new courses have been added to the portfolio for 2018, covering Waste Water Treatment, Corrugating and a new introductory course aimed specifically at the larger mill operations.

Finally, the year 2018 will see the PAPERmatters! conference return (it being held on alternate years to the CPI event).

**Concluding remarks**

As I said at the start this is my third and, now, last report as Chairman of PITA. The three years have not been easy for the Association, but through the very hard work and efforts put in by all the Association staff, it has survived. Realisation of the plans being developed should see its continual survival and ultimate prosperity that will enable it to maintain its ability to serve its Members and the papermaking industry.

**Graham Moore**

# Incoming Chairman's Message


John Kirby

Dear Members,

It is an honour and privilege for me to accept your nomination as National Chairman of PITA for the coming year.

My thanks must extend to Graham Moore, the past Chairman, and to fellow board members, for their confidence in my ability to continue the work and tradition of the Association as your Chairman. I will do my utmost to live up to that trust.

We are fortunate to have a good team in the PITA office which is working very hard on your behalf to continue to further the ideals and long traditions that have benefitted so many people over the years of PITA's existence.

This is a challenging time for the Association as technology, mill ownership, de-manning and the need to work remotely (just to name a few) all place increased pressure on our workforce. Face to face involvement is reduced by time availability, and PITA's ability to meet and share is made more difficult. Nevertheless we are all committed to doing just this, and so during 2018 we are pleased and proud to once more host the **PAPERmatters!** event during the summer. Dates will shortly be forthcoming, so please make a big effort to come and learn, share and enjoy networking with both papermakers and suppliers under one roof.

The magazine is a beacon of hope and continues to receive accolades both in the UK and abroad. Once more our sincere thanks go to the team and their continual efforts to provide what I believe is the best paper publication (yes there is an e-version for those who want it) for our industry in the UK.

Just like the industry, the Association is under financial pressure to balance the books, and we are all continually looking for ways to cut costs yet improve membership services.

Finally there are signs of an upturn as closures slow down, as plastic packaging comes under increasing environmental criticism, as Kindle purchases fall and real book sales rise again. Let's look with optimism and work together for the future we all want to share.

**John Kirby**

## PITA Board

| **2017-2018** | |
|---|---|
| John Kirby | *National Chairman* |
| Graham Moore | *Immediate Past Chairman* |
| Stephen Hutt | *Financial Director* |
| Helen Dolan | *Company Secretary* |
| Martin Wroe | |
| Tim Klemz | |

| **2016-2017** | |
|---|---|
| Graham Moore | *National Chairman* |
| John Kirby | *Deputy Chairman* |
| Martin Wroe | *Immediate Past Chairman* |
| Stephen Hutt | *Financial Director* |
| Helen Dolan | *Company Secretary* |
| Tim Klemz | |

| **2015-2016** | |
|---|---|
| Graham Moore | *National Chairman* |
| John Kirby | *Deputy Chairman* |
| Martin Wroe | *Immediate Past Chairman* |
| Stephen Hutt | *Financial Director* |
| Helen Dolan | *Company Secretary* |
| Tim Klemz | |

## PITA Office/Paper Technology

**Barry Read**
*Chief Executive*
PITA Office

**Helen Dolan**
*Company Secretary*
PITA Office

**Daven Chamberlain**
*Editor*
Paper Technology

**Graham Sutton**
*UK Representative*
Paper Technology

**Nicolas Pelletier**
*European Representative*
Paper Technology


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Tereos

# Hawkins Wright Symposium Nov. 2017 (LONDON)

Daven Chamberlain
*Editor, Paper Technology*

The Hawkins Wright Symposium needs little or no introduction, being the single largest annual gathering of the Pulp and Paper manufacturing and merchanting fraternity on UK soil. Indeed, this year, which saw it revert back to the magnificent Institution of Engineering and Technology premises in Savoy Place, was the largest yet. Since its last visit here (in 2012) the audience has increased over 50%, and this year stood at 340, representing 37 countries. Given that the single largest geographical market for market pulp is China, it is interesting to note that only seven Chinese representatives were present; the main Chinese buyers and suppliers probably attend the mirror event in Shanghai (during Shanghai Pulp Week) which started just five years ago, and will be held next on 15 March 2018.

Every year the event attracts considerable sponsorship; again in 2012 there were fifteen sponsors which by 2017 had grown to nineteen, with all of the originals from 2012 remaining firm today, with the exception of one (Ence), and with five new entrants. So this year thanks are due to **Akzo Nobel**; **Altri**; **April**; **Arauco**; **Cenibra**; **CMPC Pulp**; **Ekman**; **Eldorado Brasil**; **Fibre United (UPM & Canfor)**; **Fibria**; **G2 Ocean**; **Ilim**; **Itochu**; **Mercer Pulp**; **Metsä**; **Omya**; **Södra**; **Stora Enso**; and **Valmet**.

**Bronwen Maddox (Institute for Government)**

Traditionally the event commences with a review of the European / World economic position. This year saw a slight change; the single largest concern for the UK (and EU) Governments is Brexit, so Bronwen Maddox gave some observations and opinions on how the process is progressing. At the time of writing we are still at stage one (trying to agree the Irish Border question, Rights of EU Citizens in the UK, and the Divorce Bill payment).

It may seem that little has been going on over the seven months since Brexit was launched formally, yet that would be a mistake. Diplomats and civil servants are working long hours, alongside the politicians, yet the problem all along has been that there is no fixed vision of what the UK wishes to achieve. Therefore, all those involved from the UK side have to produce and offer a series of parallel plans and objectives, which reduces focus. (Likewise, the EU side is also having to model for a possible Labour Government should another election take place before March 2019).

Technically Brexit remains a possible concept, but achieving it is clouded by the politics, both in the UK and across the Channel. Furthermore, politicians are taking little notice of business, which risks business investment decisions being delayed or focussed elsewhere. Even the post-Brexit scenario is unclear; what relationship do the two sides want? The UK seems to want a future outside the bureaucracy of the EU, yet still remaining part of 'Europe'. However, the EU does not understand this concept, as it has a different corporate vision of what being 'European' involves. Indeed, post Brexit it is uncertain what the EU will do with what remains; further enlargement is unlikely (especially as regards Turkey) but increased integration is on the cards. Also, it has yet to come to terms with how it should deal with the more autocratic states such as Poland and Hungary.

Against this backdrop, the Rest of the World views Brexit with uncertainty, if not downright horror. China is mystified, as is the US, while Russia is continuing to probe for weaknesses throughout the EU. Indeed, Brexit affects much more than economics; it is a major challenge to security and defence in the region.

In conclusion, the UK Government only started formal discussion in Parliament of the Brexit Bill around the time of this Symposium. Passage of the Bill will be the most dangerous time for the current Government, and the period of uncertainty is likely to last until Easter 2018. Potentially the Government could fall during this period, should sufficient opponents on all sides vote against the Bill, and in a new election it is even money as to who would be the victor. Should the Government survive the next few months, it is anyone's guess how Brexit will proceed; if it stays, the form of Brexit will be determined largely by the power struggle within the Conservative party as to the 'hard' vs 'soft' Brexiteers.

**Ilkka Hämälä (Metsä Fibre)**

Speaking to the title 'The future of the pulp mill', Illka described the recently inaugurated bioproduct mill at Äänekoski, Finland. When the old mill started, production capacity of pulp was 250,000tpy; by contrast this new plant will output 1,300,000tpy of pulp, along with other materials. The biorefinery concept revolves around the idea that 100% of the wood raw material will be utilised, to produce pulp and energy (as per a traditional pulp mill) and side streams (*Figure 1*). In this case the non-fibrous products include tall oil (used for biodiesel production), turpentine and sulphuric acid. In future they will look at lignin products, textile fibres and other solid by-products, including biocompost. In addition, bioelectricity and steam will be generated, some from gasification of wood bark, and from biogas produced from sludge. Indeed calculations suggest the mill will produce 2.5% of the electricity used in Finland. This mill development is the largest and most expensive 'forest product' project ever undertaken in Europe, and it shows the way forward for the industry as a whole.

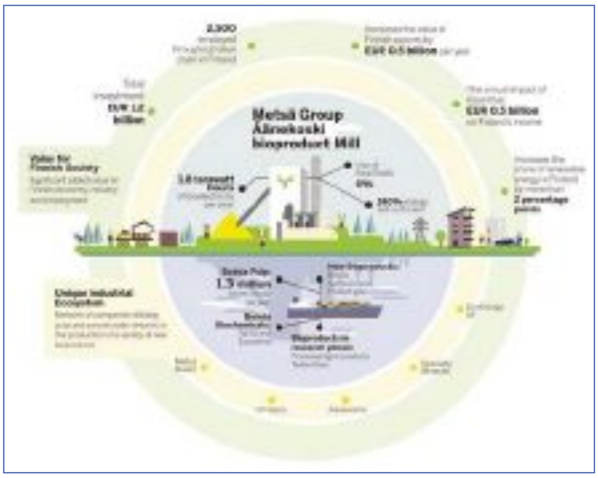

**Figure 1. Schematic showing various aspects of the Äänekoski Bioproduct Mill.**


Figure 2. Map showing market pulp producers in Eastern Europe.

**Sebastian Heinzel (Heinzel Sales)**

After the coffee break, the meeting continued with a look at the East European market, specifically how the market pulp segment interacts with the paper producers in the region. In this instance, Heinzel were chosen because, although sited in Austria, over the last five decades they have built a distribution network across the region. In addition, over recent years they have gone from just merchanting to combining this with manufacture of both pulp and paper.

Eastern Europe encompasses around 330 million inhabitants (being of similar size to the USA) but the population is shrinking, through both demographic changes and migration of the younger population to wealthier regions. Nevertheless, paper and pulp production rose from 5 to 10 million tpy between 1995 and 2016 (making it similar in size to Africa and the Middle East, combined). Furthermore, demand is continuing to grow, both in pulp (demand for market pulp is forecast to grow 2.7%pa, to reach 2.65Mtpy by 2021) and in finished paper goods, notably tissue and hygiene products, which is growing currently by some 3-4%pa.

A major feature of the region is the lack of sea ports, and poorer local infrastructure. Together these problems have to some extent insulated the indigenous pulp producers (*Figure 2*) who, while not of the stature of the newest mega-mills, have the benefit of relatively easier logistics. Therefore, although production costs may be higher than those from the most modern pulp mills elsewhere, transportation costs are lower.

As with elsewhere in the world, the growth of tissue has proven to be a major catalyst for market pulp producers. *Figure 3* shows the demand for market pulp in various countries, while the number next to each country identifies the number of tissue mills. Tissue demand in the region is forecast to grow by a further 1 million tonnes between 2016 and 2025, predominantly in Russia (330kt), Poland (180kt) and Ukraine and Romania (both 90kt). In addition, growth in white containerboard means further increased need for virgin fibre.

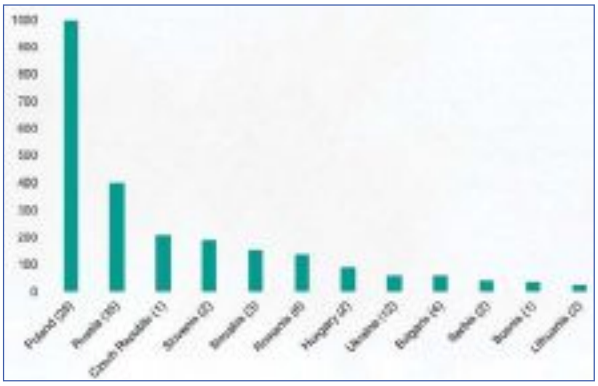

Figure 3. Estimated market pulp demand (in tonnes) by country (number in brackets shows number of tissue mills).

Overall the region continues to be a significant focus for investment, because, notwithstanding the shrinking population, rising living standards are producing a pull for more goods. In addition, a Chinese infrastructure drive to produce a new 'silk route' is leading to improvements in both road and rail communication between China and Europe, which is benefitting the region.

**Haidong Weng (Xaimen C&D Paper & Pulp)**

This next talk was unusual for the HW Symposium, in that it focussed not on market pulp, or on paper sectors or geographical areas, and their pull on the market pulp sector. Instead it highlighted new Chinese regulations, and their impact on the recovered paper market. Obviously this does still impact the market pulp market, since paper mills all have one thing in common – a need for fibre. If Governmental regulations restrict imports of recovered material, the need for raw material will be met from two other sources: market pulp, or increased recycling of indigenous material.

In 2015 China imported around 41Mt of solid 'waste' from the rest of the world, which included paper and board materials. The National Sword programme, of 2017, aims to reduce import of the most polluting grades of solid waste, which from a paper perspective includes contaminated and low grade products (i.e. those with food impurities, consignments that are wet and infested with mould and other biohazards, and those mixed with refuse and other non-paper products). At the same time it will restart domestic garbage reclassification, and push to integrate municipal waste processing with the indigenous recycling industry.

The Chinese Paper Association report of 2016 highlighted that of the 28.5Mt of imported recovered paper, OCC, MOW and ONP/OMG formed the vast majority (*Figure 4*). However there was a significant minority (around 5.7Mt) of 'Unsorted Mix' which is the target for the National Sword action.

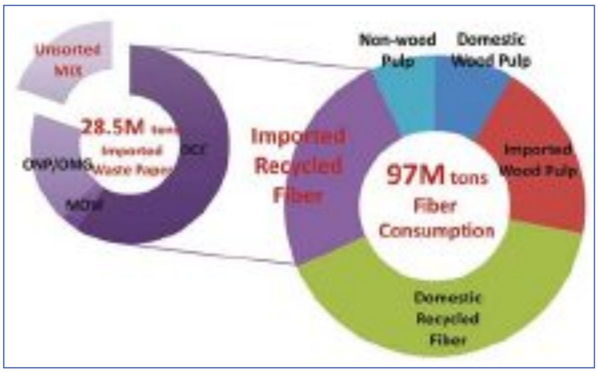


Figure 4. The fibre structure of the Chinese paper industry.

The action has a number of aims, including: to foster greater internal recycling; reduce dependency upon external raw material suppliers; improve product quality; and reduce pollution. China no longer wishes to be the 'dumping ground' for the West's unsorted, low grade waste. Given the size of the UK's recovered paper market, which in 2016 amounted to 7.9Mt, of which 47.2% was exported to China, what effect this will have remains to be seen. However it is conceivable that lower grade material will either be upgraded by improvements in UK's recycling system, or lower grade material will be focussed elsewhere in the world, which in turn could lead to shortages of quality material for the indigenous producers.

**Oliver Lansdell (Hawkins Wright)**

The meeting finished with the standard Hawkins Wright forecast of the pulp market. This year Oliver commenced with a review of the previous year, which has been a real winner for the pulp producing fraternity. Hardwood prices had risen around 50% compared to this time last year, with softwood up 40% (but predicted to go higher still). Prices have been driven higher by significant currency shifts, and by problems with supply caused by unexpected outages of some pulp mills. In addition, with China exerting the greatest geographical pull on the pulp supply side, the closure of significant amounts of old and outdated capacity in China (both paper and pulp) has resulted in a reduction in the supply of indigenous non-wood fibre, which has further stimulated market pull eastwards.

Overall around 3.5Mt of extra capacity is expected to become available over the next year, but the market is expected to grow only by 1.5-2Mt. Therefore, it is anticipated that in the short term there will be over capacity, before supply and demand fundamentals cause a rebalancing. In the meantime, some conversion of pulp capacity to dissolving grades is anticipated (*Figure 5*). Finally, to quote Oliver directly, with no new pulp mill projects expected to come to fruition in the next few years, fibre supply is anticipated to "become THE dominant feature in the global market for years ahead".

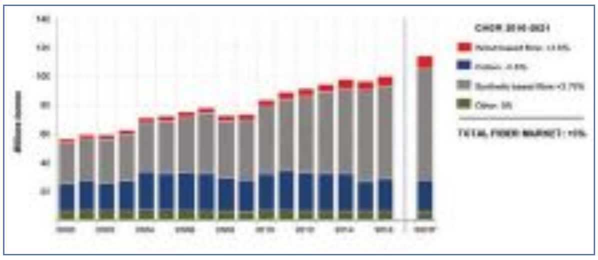

Figure 5. World textile fibre production forecast (source – Hawkins Wright).

# Axchem UK Opens New Headquarters

Axchem UK commenced business in 2010. Since then the team has grown to 12 personnel, based mainly in the NW of England, with the exception of 2 members who are situated in SE England to support the mills there.

Earlier this year we identified the need to relocate our UK operation in order to maintain effective communication with our customer base and provide a central place for development of the business going forward. With this in mind we moved to new 3750sqft offices and laboratories, which are easy to reach, being just off the M65 between Blackburn and Darwen. These were opened by Barry Read (CEO of PITA) on 29 November 2017.

Barry Read and Stuart Thomas (centre L & R) surrounded by members of the Axchem UK technical team, at the opening of the new facility.

Our facilities include a spacious car park, with additional parking at the side of the building.

Once inside, there is a comfortable reception area with accessible offices and meeting rooms.

In terms of technical facilities, we have two main laboratories. First is a wet lab, comprising:

- Pulper
- Airondeck
- Dynamic Former
- Press and Dry
- Schopper-Reigler Freeness and Drainage
- Britt Jar
- Charge and Zeta Meter

Then a dry and fully-conditioned paper testing facility, which houses:

- Tensile Tester
- SCT and Compression
- Datacolour Spectrophotometer
- Friction
- Cobb
- Ash
- Microscope
- Aimsizer Particle Size Counter
- Flow Cytometry
- FTIR

We have even included dedicated workshop space for maintenance and repair of pumps.

Overall, we are confident that our new laboratories are fit to service the ever more complicated needs of 21st Century Papermaking.  Axchem's intention is to use the new facility to support the UK Paper Industry. To this end, we are proud to report that we have recently received the new ISO 9001-2015 accreditation for ‘Application of Chemicals and Technical Support to the Paper Industry’.

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# Energy Review 2017

**Steve Freeman**
*Director of Environmental & Energy Affairs,*
CPI

For those making investment decisions, the dizzying speed of market change, technology and regulatory policies are diametrically opposite to the long-term stability required to confidently project into the future to guarantee returns required to justify multi-million-pound long-term investments. Yet as generation plant ages, the cost of grid delivered electricity increases and global competition remains as fierce as ever; "no change" is not a long-term option.

While this has always been the case, such is the increasing speed of change in the energy sector that decision-makers can be forgiven for prevarication – no sooner does a topic look settled, then something changes that requires a fundamental reassessment. It's not surprising to see different companies coming to different answers at different times.

One of the consistent calls from industry is for regulatory stability as a background against which decisions can be made. To the credit of the Government, the Climate Change Act provides just that out to 2050, when the UK has a legally binding target that emissions of climate change linked gases will be at least 80% lower than they were in 1990. While we may argue this target is too ambitious, and risks making the UK uncompetitive if no other country decarbonises as quickly as us, politicians of all parties remain committed to the target with policies in place to progressively decarbonise energy use in the UK. If anything, policies are only likely to tighten as politicians react to the call from President Trump for the US to withdraw from the Paris Agreement; indeed one of the first post-Brexit actions by politicians of all parties was the reaffirmation of long-term decarbonisation targets. So whatever else happens, continued decarbonisation of UK energy use can be expected.

Throughout the year CPI has focused on persuading Government that the cumulative impact of polices on energy prices is unsustainable. While we have achieved great success in persuading Government to support Energy Intensive Industries through the transition to a low-carbon economy (gaining partial exemptions from the costs of the Climate Change Levy, Emission Trading System, Carbon Price Support, Renewable Obligation, Feed-in-Tariffs and Contracts for Difference) this support does not cover everyone in our sector, does not cancel all additional costs, and will not last forever. At some stage paper mills will need to decarbonise their production, either deliberately, choosing to strengthen the sustainability credentials of paper, or inadvertently, as economics drive the change.

In this context, the reason for the 2050 Decarbonisation Roadmaps and their importance becomes clear. Government invited the eight largest heat-intensive manufacturing sectors to work in partnership with a variety of experts to understand the challenges and opportunities to be addressed if UK manufacturing can be competitive in a low-carbon economy. Importantly, this was set within the context that driving industry away from the UK does nothing to reduce global emissions, yet destroys wealth creation and jobs.

PITA and CPI led the 2050 Roadmap engagement for the UK paper industry, strongly supported by Members. During 2017 the initial research was revisited and revised to produce an action plan jointly signed by the industry and Government, with formal publication late in 2017. A key challenge for 2018 will be to deliver the action plan and build on the partnership with BEIS.

Turning back to energy cost, the Government commissioned Professor Helm to review the operation of UK energy markets. Helm concluded that setting long-term targets and high tariff levels for new technologies does stimulate new investment, but also prevents the UK economy from fully benefiting from reducing deployment costs as long-term contract prices get locked in for existing operations – paid for of course by customers. Helm also noted the costs of offshore wind deployment have plummeted, and solar investments are beginning to look feasible at grid parity cost. Add to this the rapid development in storage technologies, such as batteries – critical to manage the inherent intermittency of renewables – and the fundamentals of the energy system are changing. Already we see a commitment to phase coal out of UK generation system by 2025 – that just a few years ago looked impossible. Of course this added complexity and changes to the electricity network comes at a serious cost – and the non-energy component of bills is increasing at an eye-watering rate.

Amidst all the focus on energy markets and carbon policies, the fundamentals of energy efficiency risk being neglected. One expectation for 2018 is the launch of a new support scheme for energy efficiency – in the first instance to support the utilisation of waste heat, but hopefully also to support generic efficiency in industry.

So, although we suffer from sticks in the form of regulatory costs, we do get some welcome carrots from policy support…

## RECENT AND UPCOMING BOOKS

*Paper Machine Clothing: Key to the Paper Making Process*
Sabit Adanur
Asten Johnson

*Pulp and Paper Industry: Emerging Waste Water Treatment Technologies*
Dr. Pratima Bajpai
Elsevier
ISBN-13: 978-0128110997

*Paper Making: The Hahnemühle Papermill*
Koto Bolofo
Steidl (2018)
ISBN-13: 978-3869306377

*Henry Cooke and the Beetham Papermakers 1788-1996*
W.J. Inman
BAPH 'Studies in Paper History' Volume 5
ISBN-13: 978-0952575740

*The Illusive Silver Lining*
Mike Malley
BAPH Monograph 11
ISSN: 1759-765X

*Watermarked Paper from the Archives in Ravenna (1287-1693)*
Nicolangelo Scianna
Brepols (2018)
ISBN-13: 978-2503569697

*The Pulp and Paper Industry: a perspective for Wall Street*
Jim Thompson
Press Nip Impressions
ISBN-13: 978-0999123447

# Environment Review 2017: Challenges & Opportunities

**Debbie Stringer**
*Environment Manager,*
**CPI**

The year 2017 was dominated by pondering the imponderable, a future post-Brexit state with little clarity as to what that might look like. Short term, Business as Usual continues for environmental regulation, at least.

Whilst the UK continues to negotiate with the European Union (EU) on the terms of our exit, other, nonetheless important, discussions are underway much closer to home. Discussions on the shape and form of the regulatory regimes in the UK, post Brexit. Of particular interest to the paper sector are environmental regulations, more specifically the environmental permitting regime in the UK.

The paper sector has been regulated through environmental permitting for some time now, initially with Integrated Pollution Control, followed by Integrated Pollution Prevention and Control (IPPC) and ultimately Environmental Permitting Regulations transposing the Industrial Emissions Directive (IED) into UK law. This regulatory framework has been essentially the same across the EU aiming for a level playing field for operators within the EU. Statistics gathered by the Confederation of European Paper Industries (CEPI) indicate a successful framework with environmental indices showing a steady improvement over time.

We can also point to another success of the current regulatory framework with the revision of the Pulp & Paper sector BREF (Best Available Techniques (BAT) Reference Document). The sector BREFs define BAT and associated emission limit levels (BAT AELs) for each sector. The European paper industry working together, coordinated by CEPI, was able to argue for a workable revision of the latest Pulp & Paper BREF.

So, with the majority of environmental regulation emanating from European Directives, what next for environmental permitting post Brexit? All options are on the table as Defra considers the Government's approach. We as a sector need to consider our thoughts and feed those views into the debate.

The key principles we would like to see adopted centre around:

**Continuation of a UK environmental permitting scheme**

Environmental permitting allows for efficient regulation with an element of consistency. A permitting scheme should continue post-Brexit. Efficient regulation, however, will rely on minimising divergence in policies between devolved administrations, and indeed the EU, as the environment is a devolved competence.

**Continuation of a sector-based approach**

A sector-based approach to environmental permitting (through the BREFs) has helped deliver an effective regulatory regime, and works well for the paper sector better reflecting the unique circumstances of individual industrial processes / activities. This is preferable to following a 'one size fits all industries' approach.

**A mechanism to Identify Best Available Techniques & BAT AELs**

In order to continue with a sector-based approach, some mechanism for the identification and periodic review of Best Available Techniques (BAT) in each sector would be required. However, there are serious concerns over resource and consistency implications if a UK-only approach were to be taken.

On the other hand, without UK data input into the current BAT determination process the collection of data – in terms of its applicability and possible misinterpretation – may lead to compliance levels (BAT & BAT AELs) which are potentially technically-unachievable and/or uneconomic for individual installations, resulting in a competitive disadvantage for UK industry.

These concerns need to be addressed.

**Future BREF's must not be adopted as 'mandatory'**

Consequently, whilst any future BREF may be useful for reference purposes, it is critical that BAT conclusions (BATc) are not formally adopted as mandatory in the UK, post-Brexit. This would be potentially damaging, especially if no UK input can be provided / accounted for in their development.

**Retention of flexibility / pragmatism through a risk-based, cost-benefit approach**

Unlike the current regime, there is an opportunity for any future UK environmental permitting approach to retain a degree of flexibility, which is administratively simple and makes allowance for applying pragmatism and discretion in suitable circumstances.

Ensuring that 'post-Brexit' the UK has a risk-based, cost-benefit approach is a way of ensuring beneficial environmental and business outcomes.

**Maintain good relationship with UK regulators**

As a sector we have developed good working relations with regulators over many years and wish to continue constructive, pragmatic discussions at a local level.

Recognising the growing pressures on public sector resources we would welcome a more-collaborative working approach to ensure regulators' expertise / understanding of our sector is maintained.

**Recognise and reward good performance**

We would welcome a system whereby sectors and operators are able to gain recognition for good performance.

**Avoid duplication of effort / minimise administrative burden**

To cut red tape, there should be greater allowance and encouragement for organisations to undertake self-assurance, either directly or using external assurance bodies and certification schemes where appropriate. The interaction between environmental permits and certified environmental (ISO 14001) and energy (ISO 50001) management systems causes considerable duplication, where substantial scrutiny is already placed on certified organisations for maintaining their 'certified status'. There is considerable scope to simplify permit conditions (or exempt from some requirements) for ISO 14001 / 50001 accredited organisations.

In summary, Brexit could represent an opportunity for the UK to design and deliver an equally-effective but more-pragmatic environmental permitting regime. A regime that both protects the environment and supports business growth. Important as we move into, what may prove to be, very challenging times…

# Tissue Review 2017

**Pirkko Petäjä**
*Principal Consultant,*
**Pöyry Management Consulting**

**Global tissue consumption continues to grow**

Together with the world economy the global tissue demand has grown quite steadily. The global annual growth rate in 2016 and especially 2015 has been approaching or above 4% while the market in longer term is forecast to grow some 3%/a. There are major differences in the regional developments in the past few years but the overall economic growth is reflected in most regions.

The general economic forecast is characterised by improving GDP-growth during 2017-18, mainly driven by developed economies; slowdown is expected in 2019-early 2020, and recovery resumes in late 2020-early 2022.

**Europe**

Tissue demand in Europe until 2025 is expected to grow 2.0%/a driven by Eastern European growth at an annual rate near 4% (excluding Russia). Russian market suffered from the conflict with Ukraine, especially 2015, but has now recovered. Western Europe has suffered from long recession time, but in the past years the tissue demand has recovered together with the economy. Typically for a mature market with limited population growth the longer term demand growth is expected to continue at a moderate pace of 1.6%/a.

**Americas**

Growth rate in North America has been above trend levels especially due to the strong growth of AfH segment. AfH is more sensitive to the economic development; higher employment, increasing disposable income resulting to increase in travelling and eating out contribute to the AfH tissue demand. Consumer tissue is much more dependent for instance on the population increase especially on a mature market with already very high consumption per capita.

Latin American countries have continued to suffer from political and economic instability and varying economic performance. Tissue market development has varied between the different countries. Brazil and Mexico account for almost 60% of the total Latin American markets. Brazil has been in deep recession and the tissue demand has declined and grown in turns, while market in Mexico has been growing or continued relatively stable. The longer term annual growth rate for Latin America is forecast at some 4%/a; the recent past years have been clearly below this.

**Middle East and North Africa**

Political turbulence in the MENA region lowered the growth in many areas in the past but in the last years the growth has been quite strong in many countries. Turkey has a great impact in the region, and for Turkey exports play a significant role impacting also the neighbouring markets. Market growth in the region goes on at over 6%/a rate. Export to Europe continues especially from Turkey.

**China and other Asia**

The developing markets in Asia, especially China, are driving the global tissue market growth. Chinese tissue paper market is expected to grow at a strong 5.2%/a rate during 2016-2025 and tissue consumption per capita is growing faster than GDP per capita. Brown tissue (unbleached, often for instance Bamboo-based) increases rapidly based on the environmental image, and is expected to account for some 15% of the total Chinese tissue market by 2020.

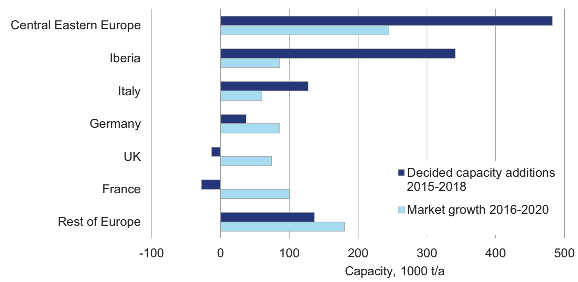
**Market growth drives the investment pace**

Market growth drives investment pace, but for instance China is adding significant volumes, surpassing market demand. As international trade plays a minor role, overcapacity has been accumulating in the recent years resulting to lower capacity utilisation rates.

Also in mature markets the investments tend to concentrate on certain hot spots. In Europe the current investment hot spots are Iberia and Central Eastern Europe. Differently from China, even if the capacity and production well exceed the market size (examples Italy, Turkey, Poland etc.) the established trade flows mean that the local overcapacity situation is not necessarily severe. However, capacity increase strongly exceeding the market growth tightens the competition. The tightening competition is urging the producers to search for new competitive advantages and cost savings. New technology concepts and fibre integration are examples of such advantages.

**INVESTMENT HOT SPOTS IN EUROPE**

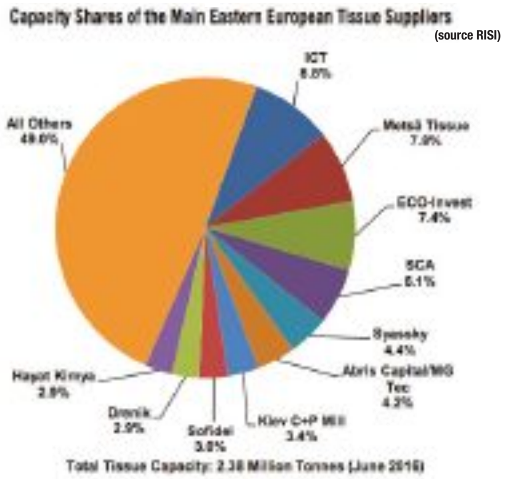
**In CEE and Iberia the competition tightens urging the producers to search for new competitive edge and cost savings**




**Current challenges**

The current historically high pulp prices have challenged tissue producers in 2017. Economic up-cycle and high pulp prices impact the tissue producers due to the fact that pulp prices significantly impact the costs but are only slowly reflected to product prices. Jumbo Reel prices follow pulp prices somewhat closer and therefore especially independent converters have suffered most in the current situation. There are several examples of this.

**MAIN PLAYERS IN EASTERN EUROPEAN TISSUE PRODUCTION**



# European Containerboard and Corrugated Board Review 2017

Outi Juntti,
*Senior Principal,*
Pöyry Management Consulting

**Solid and steady development continued in 2017**

The positive note that described the European containerboard and corrugated board markets in 2016 continued to prevail even more robustly throughout the whole year 2017. The main contributors have been the solid development in retail and especially in industrial production. The latter has continued strongly during the whole year and indeed reached the highest levels since 2000 and made even historic records in some countries like Netherlands and Austria. The growth has taken place both in non-durables and durables, which has kept demand for virgin fibre based containerboard, kraftliners and SC fluting, very strong. At the same time supply has remained tight and operating rates high allowing virgin containerbord producers to announce price increases; first in March and then again in July/August. The strong corrugated box demand has impacted also white-top liner prices and price increases were reported eg. in France and Italy during the autumn months, which is the high season for fruit packaging.

For the time being the statistics are available until October, but they indicate a very positive year for the European containerboard producers and corrugated box makers; close to 4% increase as compared to 2016 in both box deliveries and containerboard production. The most gratifying feature is that all European markets have developed positively; Poland once again very strongly over six percent, but good performance in Spain (5.5% during the first ten months) and the UK (4.4%) as delightfully also in France (2.7%) thanks to overall positive economic development and gradual pick-up of consumer confidence and retail.

**Investment activity in Europe slowing down, but consolidation continues**

Despite of the favourable market development and fairly rosy future outlook, at least some European containerboard companies have been cautious in their investment plans and expansions have been postponed or even cancelled. In June 2016 **Stora Enso** announced that it is pondering a new testliner / fluting machine on its Ostroleka mill in Poland, but then in late April 2017 the plan was scrapped. In July this year **Mondi** reported that it will postpone its new white-top linerboard project in Ruzomberok Slovakia to 2020 instead of early 2019.

On the other hand few European companies have been focusing on growing business outside the continent; in October Austrian **Prinzhorn** published that it will build a completely new greenfield mill in Turkey; start-up scheduled in 2020. **SmurfitKappa** again continues to invest in Americas as a new machine will be installed to Mexico to support corrugated box operations, which will have recently been modernised. The Group also strengthened its position in the European packaging markets and acquired **Soyuz** in Russia and a display company in Greece.

Since purchase of **SCA Packaging** in 2008 **DS Smith** has had a very determined and swift acquisition strategy which has made it a true pan-European packaging player. In summer 2017 DS Smith entered the US corrugated market by acquiring **Interstate Resources**, which is an integrated containerboard and corrugated board producer operating in the East coast. In January the company also completed acquisition of bag-in-box packaging company **Parish Manu-**

**facturer** based in Illinois. DS Smith continued its European expansions as well by taking over **EcoPack** and **Ecopaper** in Romania and **DPF Groupe** in France.

**SAICA** is planning to boost its position as the leading Southern European player and news of its intention to acquire French **Emin Leydier** started to spread in late September. Belgian **VPK** on the other hand is focusing on the Northern European markets and in April the company announced that it together with **Klingele** will invest in **Peterson**, operating in Norway, Denmark and Sweden. VPK acquired Peterson in late 2016. Furthermore VPK strengthened its position in the UK markets and purchased a 30 per cent stake in **CorrBoard UK**, a sheet company in North Lincolnshire.

All these movements bespoke for the two key trends that have been prevailing in European containerboard and corrugated board industry. The first one is geographical focus, which for the two largest players, **SKG** and **DS Smith**, means wide pan-European presence whilst the others seem to target certain regions and countries in Europe. The latter trend is be more and more balanced between containerboard and corrugated board production in order to increase value and visibility on market movements as well utilise synergies in eg. logistics and product development.

**A lot happening in the US and China – implications on Europe to be observed**

For the US containerboard industry, the year 2017 has turned out to be a year of big investment and expansion news. **IP**, **PCA**, **Pratt** and **Boise** have all announced significant expansions; either new machines or conversions that will come on stream in 2018 or 2019. Furthermore **Kruger** already started its lightweight recycled containerboard PM10, conversion from newsprint, in its Trois-Rivières mill in Quebec during this year. All in all the announced projects mean a significant, nearly 1.5 million tonnes, addition in the North American supply. Based on the published information this capacity will be almost equally divided between recycled containerboard and kraftliner and will no doubt impact on both global and European OCC and kraftliner trade and prices.

The global containerboard industry will be affected by recent movements in China as well. In July China banned imports of mixed waste paper and so far this decision and especially its unclear rules and conditions as well behavior of the Chinese buyers have created fluctuation in many European markets particularly in the UK and Italy.

| | 2015 | 2016 |
|---|---|---|
| Total Shipments (millions of m$^2$) | 43227 | 43948 |
| Total Shipments (kT) | 22313 | 22620 |
| Total Number of Companies | 395 | 401 |
| Total Number of Plants | 666 | 672 |
| Average Weight of Board (gsm) | 516 | 515 |

European corrugating statistics (source FEFCO)

# Wood-Based Panels Industry Review 2017


## Marion Le Roy

*Economic Adviser,*

European Panel Federation

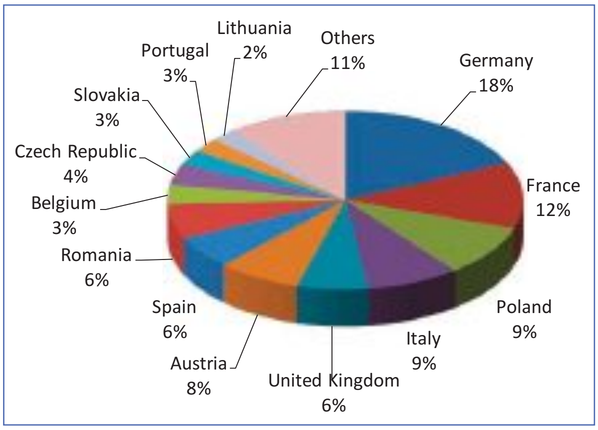

According to the figures drawn from the EPF Annual Report published in July - an extensive compilation of industry statistics collected by the federation - in 2016, the total production of European wood-based panels increased by 1.8%, reaching a total of 55.6 million m³. Particleboard production increased by 0.8% to 30.2 million m³. Medium Density Fibreboard (MDF) also grew, recording an increase of 2.0% to a total of 12 million m³. Oriented Strand Board (OSB), the third largest panel type by volume, rose strongly by 6.9% to 5.4 million m³. Second only to OSB in terms of growth rate was Softboard, which increased by 4% to 4.6 million m³. Plywood production in Europe developed positively with a 2.5% increase to 2.9 million m³. The only panel type that did not increase in production terms during 2016 was Hardboard which dropped 5.6% to 0.5 million m³.

| Production (million m³) | Countries | 2016 | 2015 | 2016 v 2015 |
|---|---|---|---|---|
| Particleboard | EU28 + EFTA | 30.2 | 30.0 | 0.8% |
| MDF | EU28 + EFTA | 12.0 | 11.8 | 2.0% |
| OSB | EU28 + EFTA | 5.4 | 5.0 | 6.9% |
| Hardboard | EU28 + EFTA | 0.5 | 0.6 | –5.6% |
| Softboard | EU28 + EFTA | 4.6 | 4.4 | 4.0% |
| Plywood | EU28 + CH | 2.9 | 2.8 | 2.5% |
| **TOTAL** | **Total** | **55.6** | **54.6** | **1.8%** |

Following an upturn in 2015, the European **particleboard** production in the EPF member countries increased again by 0.8% in 2016 in line with expectations. Output amounted to more than 30.2 million m³. Despite a slightly decreasing output (–0.6%), Germany remained the largest particleboard producing country in Europe with 5.5 million m³ in 2016, accounting for just under one fifth of the EU-EFTA production volume. The expectations for 2017 are quite positive with a rise in production in the EU-EFTA area as a whole estimated at +2%. The overall European particleboard production capacity decreased by 2.2% in 2016 or 820,000 m³. It amounted to 36.4 million m³. Some adjustments of capacities took place with a closure in France and restructuring in Portugal and Spain. The overall European particleboard production capacity is foreseen to increase marginally by 0.8% in 2017.

**MDF** production in Europe grew further by 2% in 2016 reaching 12 million m³, excluding Turkish and Russian production. With a stable output of about 3.5 million m³, Germany is still the largest European MDF producer in 2016 followed by Poland, France, the United Kingdom and Spain in decreasing order of importance. The European production capacity of MDF reduced very slightly by 150,000 m³ to 14.7 million m³ in 2016, as a result mainly of some restructuring in Spain and Germany.

European production of **OSB** rose by 6.9% in 2016 to 5.4 million m³. Germany and Romania have the largest European OSB production capacities. Following an expansion in 2015, Poland now completes the podium of OSB production countries, measured by capacity. Thanks to a new facility in Hungary and to expansions of capacity in Ireland and




Breakdown of particleboard production by country in 2016

Belgium, the European production capacity of OSB increased significantly in 2016 to 6.5 million m³. In 2017 a separate expansion is expected in the United Kingdom.

In 2016, the production of **hardboard** in Europe excluding Russia decreased by 5.6% compared to 2015 down to a total of 542,000 m³. Total EU 28 and EFTA installed production capacity for hardboard amounted to 742,000 m³ in 2015, down from 803,000 m³ the previous year. This followed closures in Romania where manufacturers are no longer thought to be producing. The main producer is Poland, followed by France and Bulgaria.

For the fifth year in a row, the European production of **softboard** increased. In 2016, output rose by 4% compared to 2015, exceeding the 4.5 million m³ threshold. Rigid softboard accounted for 64% (65% in 2015) of the output and flex softboard for 36% (35% in 2015). The installed production capacity for rigid softboard reduced very slightly to 3.5 million m³ in 2016. This included a reduction in France and an increase in Poland. The production capacity for flex softboards grew sharply from 1.55 million m³ to 2.2 million m³ following increases in Germany and Poland. For both softboard types, Poland, France and Germany are the main producers in Europe. Poland has the highest capacity for rigid softboards, whereas Germany is the leader in flexible softboards. Switzerland too has a significant production capacity for rigid softboard, albeit at a reduced level from 2014.

In 2016, the EU28 & Switzerland **plywood** production increased by 2.6% in comparison with 2015 and amounted to just under 2.9 million m³. The European output including Russia and Ukraine rose by 35% to 7.2 million m³. In 2017 production is expected to increase by 2.9% and 4.7% for the EU28 & Switzerland and Europe respectively. Russia is the largest European producer of plywood with an output amounting to 53% of the European plywood production in 2016. Finland holds the second position with a share of 16% of the European output in 2016. The combined Baltic States are the third largest producers of plywood in Europe with an output of 5%, just ahead of the individual countries Spain, Italy and France.

| Production (million m²) | MDF | OSB | Particleboard |
|---|---|---|---|
| UK | 0.95 | 0.32 | 2.31 |
| Irish | 0.42 | 0.5 | na |
| | | | |
| **Consumption (million m²)** | | | |
| UK | 1.25 | 0.55 | 2.65 |

UK and Irish wood panel statistics (source WPIF)

# Newsprint Review 2017

**Riku Kallio**
*Senior Consultant*
**Pöyry Management Consulting**

Last year's article focused largely on the UK supply-demand situation and the struggles the industry is facing amidst the continued decline in demand and the pressures of tight margins due to falling newsprint prices and increased recovered paper prices.

2017 has been an interesting year not least because of the continuing uncertainty over the impact that Brexit will bring but also because of the recent legislation announcement that the Chinese will impose on recovered paper imports.

The post Brexit vote has resulted in the substantial weakening of the pound over the latter part of 2016 and the course of 2017. Although Newsprint prices in Euro terms have remained relatively stable during 2016/2017, the price that UK publishers pay for imported newsprint has increased, as shown in *Figure 1* below. This is, of course, bad news for the publishers as revenue from ad-spend continues to decline and with circulation figures constantly under threat from competing media platforms. However, for the UK newsprint producers (and the UK manufacturing sector overall) the weak Pound can be a positive development – more expensive imports can be favourable for local producers which can also benefit from better export opportunities. The UK newsprint manufacturers cost base is not as sensitive to currency fluctuations considering that the UK is self-sufficient and a large net exporter of recovered paper.

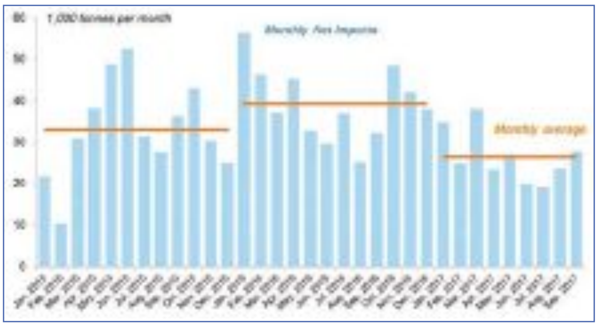



Figure 1: German newsprint price in EUR and GBP

The UK has historically been a large net importer of newsprint. Naturally, the import volumes have come down considerably from the heights of around 1.5 million tonnes in the beginning of 2000s. *Figure 2* shows monthly net imports to the UK from 2015 to the latest available data in 2017. The figures suggest that net imports have declined to less than 30kt per month in 2017. This is not surprising, considering the weak Pound against the Euro, declining overall demand for newsprint and relatively strong local producers, UPM Shotton and Palm Paper.

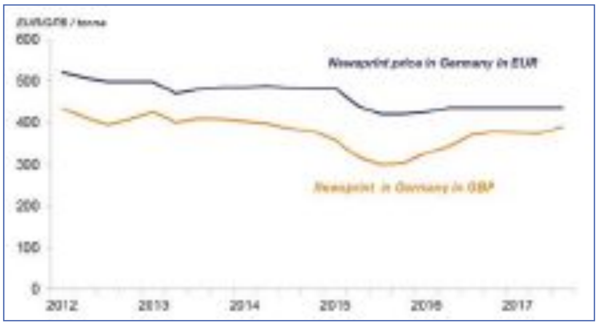



Figure 2: The UK newsprint monthly Net Trade (Net Imports)

Demand for newsprint in Europe continues to fall. After a drastic decline in 2015, the decline in 2016 was in the region of 4% and similar decreasing demand for newsprint is expected for the coming years. In Europe, Q1-Q3 2017 saw very little change in the newsprint industry capacity. However, conversion of the IP Madrid mill and Leipa Schwedt PM11 to containerboard has very recently removed ~620kt newsprint capacity from the market. Utzenstorf and Norske Skog Bruck have announced closures of around 335kt capacity for 2018. If these closures are completed, the capacity adjustments should be sufficient to keep the supply-demand balance in a reasonable condition in 2018.

Fibre costs remain the largest share of the paper producers' costs and as mentioned in last year's report, this continues to be a particular challenge for Newsprint producers, as over 75% of European newsprint is produced using recovered paper. The main production cost component is News & PAMs, the price of which has been increasing due to stagnating collection rates and buoyant demand from other markets such as tissue. Hence, recovered paper prices in the UK have been increasing over the last 2 years and with the further development and announcement of legislation from China limiting the imports of waste paper into China as of 2018, prices continued to increase in 2017 in anticipation of this change. It remains to be seen how recovered paper prices will develop in 2018 but it certainly appears that there is more pressure for prices to remain high rather than decrease.

Paper Industry Technical Association

# Dates for your Diary - Q1/Q2 2018

| | |
|---|---|
| 13th/14th February | • Energy Optimisation |
| 13th to 15th March | • Introduction to Tissue Manufacture |
| 17th April | • Pump Efficiency |
| 24th/25th April | • PITA's Paper Appreciation Course |
| 14th/15th May | • Fundamentals of Corrugating |
| 5th to 6th June | • Fundamentals of Wastewater Treatment |
| July | • PAPERmatters! 2018 Conference |

*For further details or to book your seat, please contact the PITA Office*

T: *+44(0) 300 3020 150* / E: *info@pita.co.uk* / W: *www.pita.co.uk*


John Kirby presenting the award to Dave Ingham

## David Ingham Accepts PITA Meritorious Service Award

Dave Ingham received the PITA Meritorious Award at the PITA AGM 2017 held at Romiley Mill, near Stockport. His nomination for the award read as follows:

*Dave began his first job as a trainee at East Lancashire Papermill in Radcliffe. He took a degree in Paper Science at UMIST and was rewarded with an appointment as a development engineer and later production superintendent. He left East Lancs to join the then new mill at Shotton in North Wales as assistant superintendent in the TMP plant during the expansion and start up of a new machine. With this expansion came his first real exposure to working for a large international group (UPM) spending many weeks in Finland in order to familiarise himself with the TMP process. His career blossomed and he rose to take full responsibility for the TMP section and the mill services.*

*Dave's progress gave him the opportunity to study the way management in a large multinational corporation was handled, all of which stood him in good stead for his next promotion back into the paper mill as Mill Production Manager, prior to becoming Mill General Manager.*

*There have been very few UK managers that have made such a success of an international position. He will freely admit that management in a large foreign-owned group is different because of culture, language and distance from HQ, yet Dave found a way to handle communication between the mill personnel and the group personnel. He learned quickly that if "we don't know the answer to the problem" then there will be someone in the group that does, and to involve the group resources in this way breaks down barriers and builds strong relationships.*

*Finally, if ever the industry needed a champion for Health and Safety then Dave Ingham has to be a leading contender. Not only has the mill been recognised as one of the safest in the UK but the group holds Shotton up as an example of what can be achieved with dedication and good management practice. His reward for that was to be appointed as European Health and Safety Manager for UPM.*

*Having had a fantastically successful career at the highest level of the UK's paper industry, Dave Ingham decided to leave UPM in September 2017, and currently is taking a well deserved break.*

# The Paper Industry Gold Medal

# *Call for Nominations*

***From time to time there are a few outstanding people who work to further the interests of their industry, over and above their duties to any individual company. The Paper Industry, like any other, owes its success to the commitment, effort and skill of these ambassadors. For over forty years the UK paper industry has sought to reward this commitment in the form of a prestigious annual award***

## *A Brief Background:*

The **Gold Medal Award** was established in 1966 by "*The World's Paper Trade Review*" magazine which was published by Benn Brothers and edited by Eric Haylock. The magazine later became known as "*Paper*" and its publishers continued to sponsor the Medal until 1993.

In 1982 Mr George Mandl, himself the Gold Medal winner in 1981, launched the **Paper Industry Gold Medallists' Association** with the support of all concerned and since 2005, a newly formed independent **'Gold Medal Association'** has undertaken this responsibility and representatives from other supporting Paper Industry Organisations have been invited to serve on its Award Committee. All Gold Medal winners are automatically members of the **Gold Medal Association** and thus it is probably one of the most exclusive associations in the UK Paper Industry.

## *The Future of the Medal:*

Since the Medal was launched the UK Paper Industry has changed a great deal. Accordingly the number and type of businesses, industries and organisations associated with it have increased too. To reflect these changes, the Committee wishes to broaden the scope of the award to encourage more support from associations / organisations and to enable nominees from a wide variety of backgrounds across the Fibre, Paper and Board Value Chain to be considered.

This is your opportunity to be involved by nominating a potential recipient.

## *How to Nominate Someone:*

Nominations are accepted from associations and other organisations associated with the industry, or from individuals or companies through their respective organisations.

The nominees must be within a pulp or paper related industry and the nomination must include supporting material which demonstrates the individual's personal contribution to the Industry as a whole, not just to their company.

Nominations are invited Annually. The Committee must receive all nominations by the end of January in order that the Gold Medal can be presented at an appropriate industry function; indeed, it is usual to make the presentation at the Charter Dinner of the Worshipful Company of Stationers and Newspaper Makers, which usually takes place around May.

If you would like to nominate someone, please write to the address below giving as much information about your nominee as possible and in particular provide specific examples of your nominee's achievements on behalf of the industry and why you consider him (or her) to be a suitable recipient of the medal.

**All nominations MUST be received at the address below by the end of January.**

## *What about the Winner of the Gold Medal?*

Winning the **Gold Medal Award** is a prestigious achievement and as such brings the recipient well-earned publicity and recognition. The winner automatically becomes a member of the **Gold Medal Association** and is invited to write a paper on their topic of expertise which will be offered for publication in the UK's leading Trade Journal, ***Paper Technology***.

## *For Further Information:*

Contact the **Honorary Secretary** (Barry Read) via:

**The Paper Industry Technical Association ¦ 5 Frecheville Court ¦ Bury ¦ Lancashire ¦ BL9 0UF**
**T: 0300 3020 150 ¦ F: 0300 3020 160 ¦ E: info@papergoldmedal.org.uk ¦ www.papergoldmedal.org.uk**

# Exhibitions for 2018

**5 – 8 February**
BIOFOR International, Canada
www.paptac.ca

**21 – 23 March**
Tissue World America, USA
www.tissueworld.com

**15 – 18 April**
PaperCon 2018, USA
www.tappi.org

**13 – 17 May**
Paper & Biorefinery , Austria
http://paper-biorefinery.com

**29 – 31 May**
PulPaper, Finland
http://pulpaper.messukeskus.com

**6 – 8 June**
Tissue World Bangkok, Thailand
www.tissueworld.com

**25 – 29 June**
It's Tissue, Lucca, Italy
www.itstissue.com

**26 – 28 June**
Zellcheming, Germany
www.zellcheming.de

**10 – 12 October**
MIAC, Italy
www.miac.info

**13 – 16 November**
PAP-FOR, Russia
www.papfor.com

**15 – 17 November**
Paperex 2018, India
http://india.paperex-expo.com

# Industry Statistics 2016

***Information supplied courtesy of CPI, CEPI and HM Revenue and Customs***

## 2016 – Summary

In retrospect, 2016 was remarkably quiet, following on from the devastation of the year before. Aside from two changes in ownership and James Cropper initiating production of high quality moulded pulp, there were no closures of mills or machines.

## 2017 – Preliminary Assessment

In many ways 2017 has mirrored 2016, in that relatively little change has occurred. Essity announced the planned re-opening of Tawd Mill (Skelmersdale) in the near future, although the company did also announce closure of PM2 at the Stubbins Mill (Ramsbottom). Furthermore they divested the Chesterfield Mill (1TM, 31,000tpy) to Sidcot Group. Aside from this, no capacity or holding changes were publicised at the time of writing.

## 2018 – Preview

Going forward there is one overriding topic that continues to hang over the whole country – Brexit. The process and its implications should become more evident in 2018, then the industry's response will become clearer.

*Daven Chamberlain, Editor, Paper Technology*

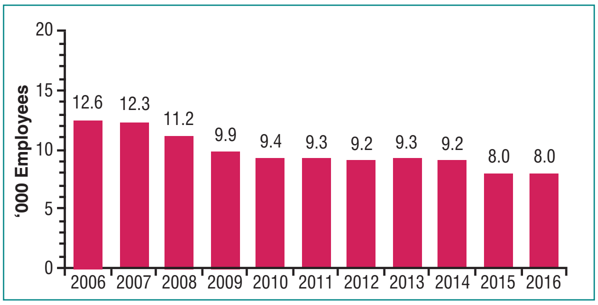


cpi confederation of paper industries

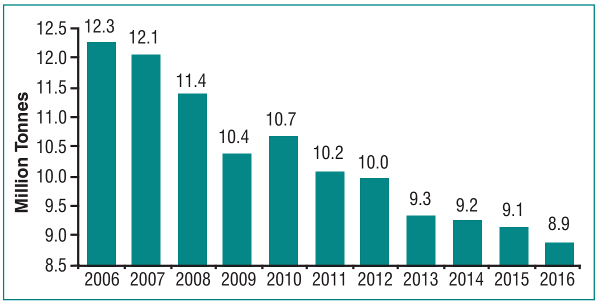
cepi

## *UK Data (CPI/HM Revenue & Customs)*

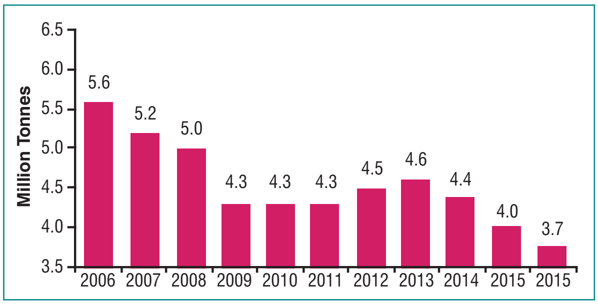
*Numbers Employed in the Paper Industry 2006-2016*



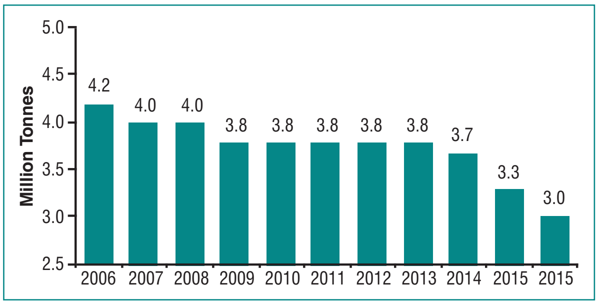

*UK Consumption of Paper and Board 2006-2016*



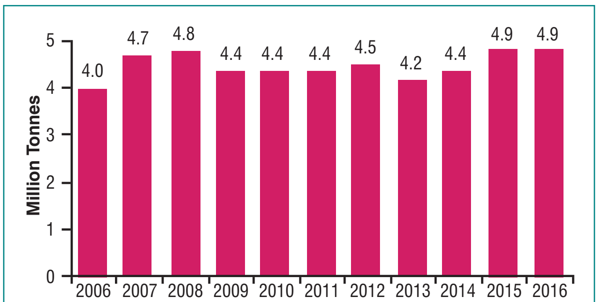

*UK Production of Paper and Board 2006-2016*




*Recovered Paper Usage in UK Papermaking 2006-2016*

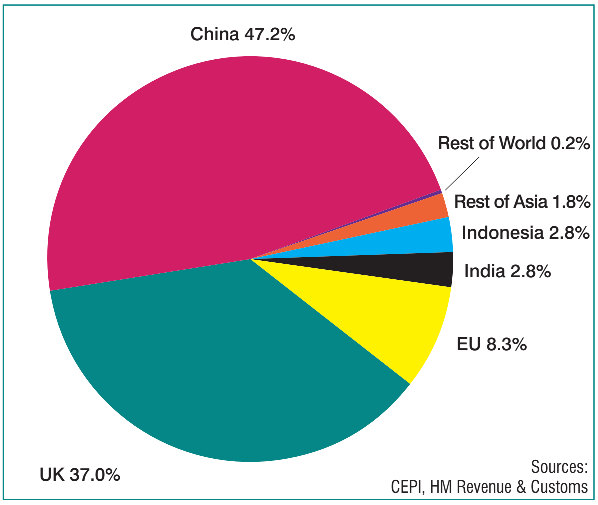



*Recovered Paper Exports 2006-2016*




Source: HM Revenue & Customs

*Recovered Paper Markets 2016*




*Industry Facts 2016*

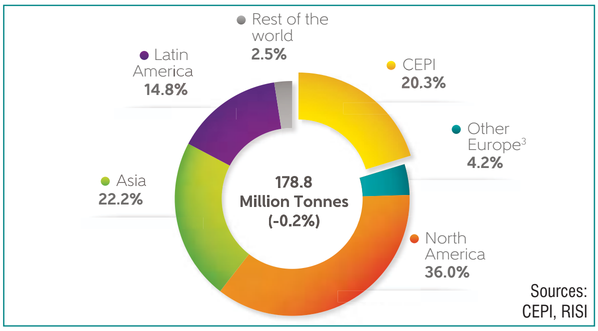
| | |
|---|---|
| CPI MEMBER COMPANIES | 65 |
| CPI MEMBER EMPLOYEES | 20,000 |
| PAPER & BOARD PRODUCTION* ('000 TONNES) | 3,675.6 |
| CORRUGATED PRODUCTION (MILLION SQ. METRES) | 3,873.2 |
| RECOVERED PAPER COLLECTION ('000 TONNES) | 7,824.8 |
| TISSUE PARENT REEL PRODUCTION ('000 TONNES) | 728.0 |

** includes parent reel production*

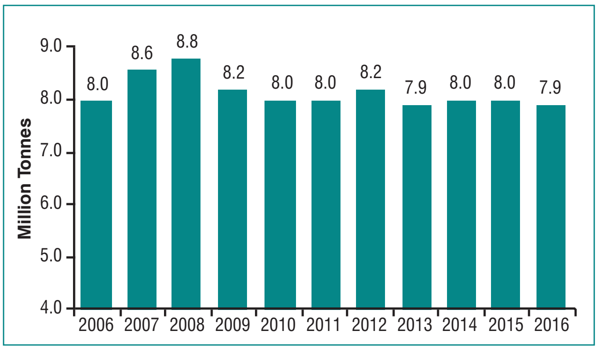
## *European Data (CEPI)*

## *Pulp – Global View*

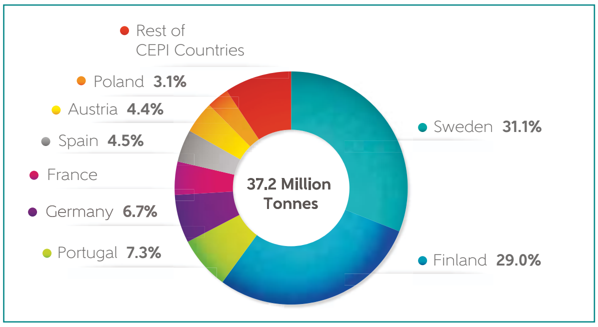
*Pulp Production by Region in 2015*



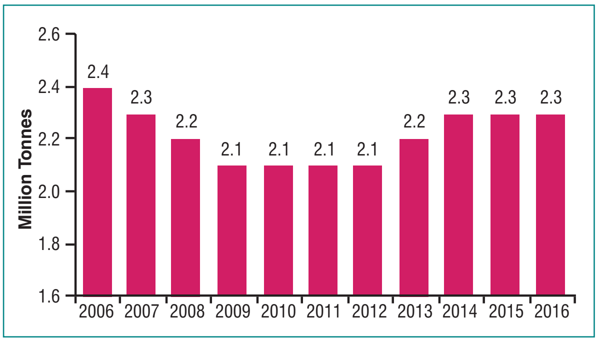

*Recovered Paper Collection 2006-2016*



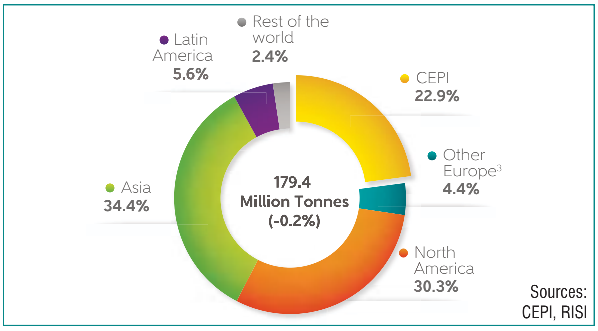

*Pulp Production by CEPI Country in 2016*



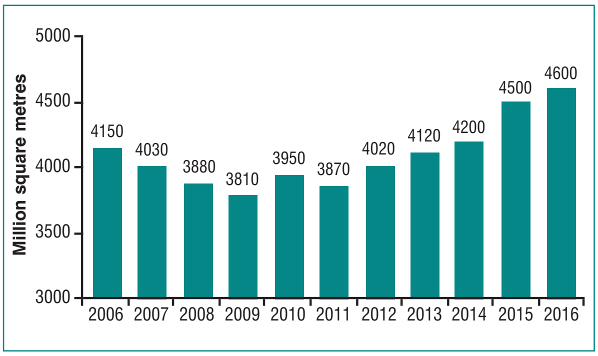

*Consumption of Paper by Corrugators 2006-2016*



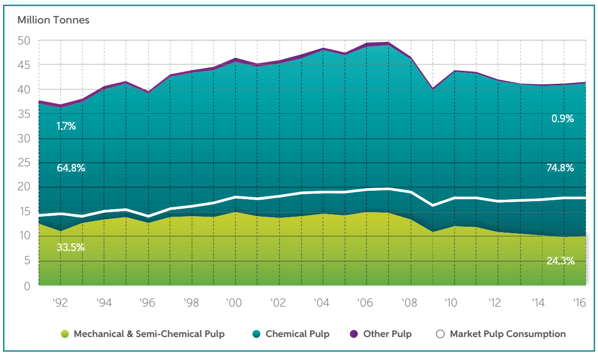

*Pulp Consumption by Region in 2015*




*Production of Corrugated Boxes 2006-2016*




*Pulp Consumption by Grade CEPI Countries in 1991-2016*



# Pulp

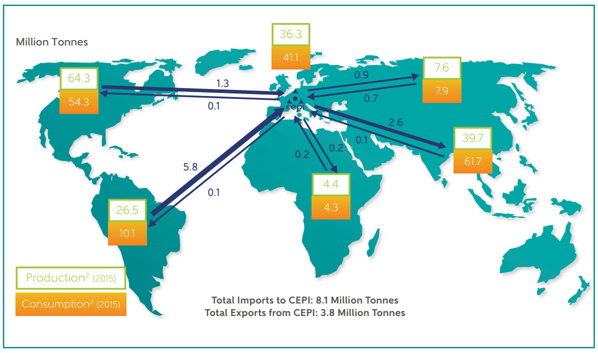
### CEPI Exports of Pulp to Other Regions 2000-2016

| 000 Tonnes | 2000 | 2005 | 2010 | 2015 | **2016** | % Share of Total | % Change 2016/2015 |
|---|---|---|---|---|---|---|---|
| Other Europe | 724 | 674 | 719 | 768 | **879** | 23.0 | 14.3 |
| North America | 104 | 187 | 62 | 59 | **53** | 1.4 | -11.1 |
| Latin America | 6 | 20 | 49 | 69 | **65** | 1.7 | -5.6 |
| Asia | 412 | 1,076 | 1,595 | 2,156 | **2,604** | 68.2 | 20.8 |
| Rest of the World | 86 | 114 | 142 | 187 | **215** | 5.6 | 15.0 |
| **Total** | **1,332** | **2,071** | **2,567** | **3,240** | **3,816** | **100.0** | **17.8** |

### CEPI Imports of Pulp from Other Regions 2000-2016

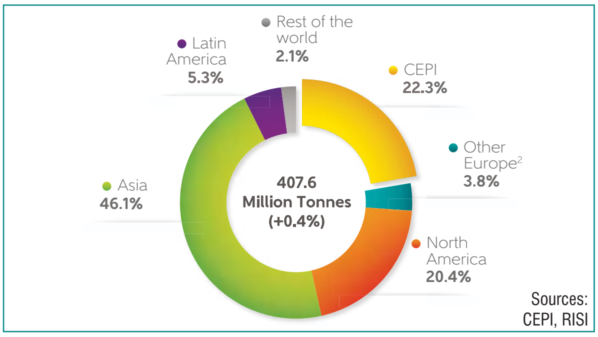
| 000 Tonnes | 2000 | 2005 | 2010 | 2015 | **2016** | % Share of Total | % Change 2016/2015 |
|---|---|---|---|---|---|---|---|
| Other Europe | 657 | 615 | 480 | 663 | **698** | 8.6 | 5.2 |
| North America | 4,623 | 3,891 | 2,292 | 1,415 | **1,348** | 16.6 | -4.8 |
| Latin America | 1,916 | 2,825 | 4,733 | 5,657 | **5,762** | 71.1 | 1.8 |
| Asia | 272 | 197 | 134 | 220 | **133** | 1.6 | -39.5 |
| Rest of the World | 456 | 433 | 81 | 135 | **169** | 2.1 | 24.5 |
| **Total** | **7,924** | **7,961** | **7,721** | **8,091** | **8,109** | **100.0** | **0.2** |

### Trade Flows of Pulp to and from CEPI Countries in 2016

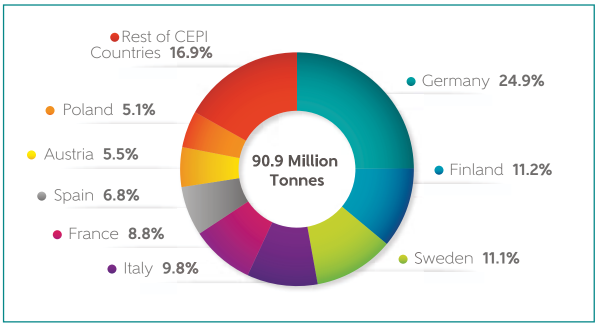



# Paper – Global View

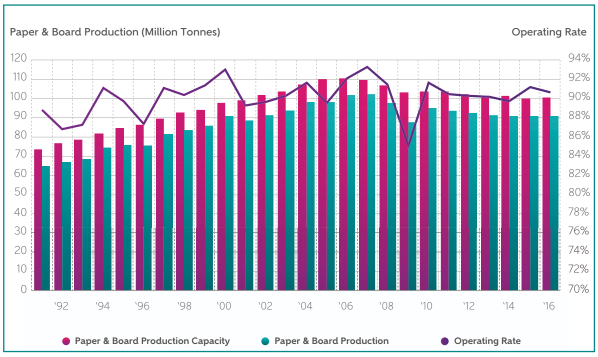
### Paper & Board Production by Region in 2015



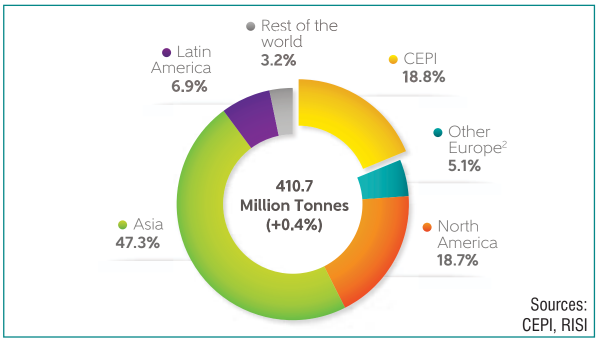

### Paper & Board Production by CEPI Country in 2016




### Paper & Board Production and Consumption in CEPI Countries 1991-2016




### Paper & Board Consumption by Region in 2015



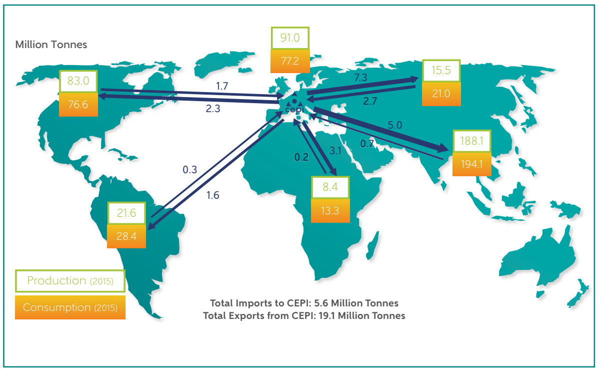

### CEPI Exports of Paper & Board to Other Regions 2000-2016

| 000 Tonnes | 2000 | 2005 | 2010 | 2015 | **2016** | % Share of Total | % Change 2016/2015 |
|---|---|---|---|---|---|---|---|
| Other Europe | 6,090 | 6,825 | 7,349 | 7,288 | **7,275** | 38.0 | -0.2 |
| North America | 2,283 | 2,802 | 2,055 | 2,069 | **2,251** | 11.8 | 8.8 |
| Latin America | 874 | 1,194 | 1,879 | 1,794 | **1,568** | 8.2 | -12.6 |
| Asia | 2,933 | 4,742 | 5,099 | 4,980 | **4,983** | 26.0 | 0.1 |
| Rest of the World | 1,707 | 2,229 | 2,783 | 3,063 | **3,060** | 16.0 | -0.1 |
| **Total** | **13,887** | **17,793** | **19,164** | **19,194** | **19,138** | **100.0** | **-0.31** |

### CEPI Imports of Paper & Board from Other Regions 2000-2016

| 000 Tonnes | 2000 | 2005 | 2010 | 2015 | **2016** | % Share of Total | % Change 2016/2015 |
|---|---|---|---|---|---|---|---|
| Other Europe | 3,318 | 2,727 | 2,525 | 2,544 | **2,699** | 48.1 | 6.1 |
| North America | 2,191 | 1,915 | 1,829 | 1,608 | **1,656** | 29.5 | 3.0 |
| Latin America | 198 | 498 | 498 | 363 | **346** | 6.2 | -4.7 |
| Asia | 332 | 394 | 625 | 581 | **659** | 11.7 | 13.4 |
| Rest of the World | 344 | 369 | 307 | 270 | **247** | 4.4 | -8.7 |
| **Total** | **6,383** | **5,903** | **5,783** | **5,367** | **5,607** | **100.0** | **6.3** |

### Trade Flows of Paper & Board to and from CEPI Countries in 2016



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Contact: Ying Sou

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Contact: Julian Wood

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Contact: Tony Pope

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Email: mike.denman@cristal.com
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Contact: Michael Denman

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e.mail: info@afcparg.org.ar
Web: www.afcparg.org.ar
*Chief Executive Office:* Néstor Nisnik

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Tel: +61-3-9467-9722. e.mail: admin@appita.com.au
Fax: +61-3-9467-9778.
Web: www.appita.com.au
Year of Foundation: 1946
*President:* Vesna Milunovic
*Executive Director:* Adele Elice-Invaso

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Tel: +55-11-3874-2700.
e.mail: faleconosco@abtcp.org.br
Web: www.abtcp.org.br
Year of Foundation: 1967
*Executive Director:* Darcio Berni

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PAPTAC
740 Notre-Dame ouest, Bureau 1070, Montreal, Quebec, Canada H3C 3X6.
Tel: +1-514-392-0265. Fax: +1-514-392-0369.
e.mail: ghay@paptac.ca
Web: www.paptac.ca
Year of Foundation: 1915
*Executive Director:* Greg Hay
*Chairman:* Eric Ashby

**Chile**
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Asociación Técnica de la Celulosa y el Pape
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e.mail: atcpchile@atcp.cl
Web: www.atcp.cl
Year of Foundation: 1972
*President:* Andrés Mellado
*General Secretary:* Juan Carlos Silva

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e.mail: service@ctapi.org.cn
Year of Foundation: 1964
*President:* Chen Xuezhong
*Secretary General:* Cao Chunyu

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*Executive Director:* Isabel Cristina Cardona Ruiz
*President:* Nelson Hernando Quiñones Hurtado

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e.mail: info@ippta.co
Year of Foundation: 1964
*President:* Shri Pawan Agarwal
*Chief Operating Officer:* Neehar Aggarwal

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e.mail: info@japantappi.org
Web: www.japantappi.org/e/
Year of Foundation: 1947
*President:* Mr. Yoshiki Koseki
*Executive Director:* Dr. Takanori Miyanishi

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Korean Technical Association of the Pulp and Paper Industry
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e.mail: ktappi@ktappi.or.kr
Web: www.ktappi.or.kr
Year of Foundation: 1967
*President:* Hak Lae Lee

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*National Chairman:* Iain Kerr
*Executive Director:* Lynne Askew
*Administration:* Melanie Smith

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e.mail: twntappi@ms31.hinet.net
*President:* Yun-Chuan Ku

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Web: www.tappi.org
Year of Foundation: 1915
*President:* Larry Montague
*Chairman:* Paul R. Durocher

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La Asociación Venezolana de productores de Pulpa, Papel y Cartón
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**FOURSTONES PAPER MILL CO LTD**
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## G

**G.B.C. (SPECIALITY CHEMICALS) LTD**
*Recyclable Barrier Chemicals*
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Chipping Norton, Oxfordshire, OX7 6AW
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**GL&V**
*GL&V designs and markets equipment used in various stages of pulp and paper production, from pulp preparation to sheet forming and finishing. GL&V serves the global market with spare parts, rebuilds, upgrades and optimization services for new and existing equipment. Our group is focused on innovation and provides technologies that generate energy and cost savings for our customers.*
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*Mineral Producer*
2 Place E Bouillieres, F-31036, Cedex 1, France
Tel: +33 561 502065 Fax: +33 561 502045
Email: yannick.rabot@imerys.com
Contact: Yannick Rabot

**INGREDION UK LTD**
*Ingredient Solutions*
Ingredion House, Manchester Green, 333 Styal Road, Manchester, M22 5LW
Tel: 0161 435 3346
Email: catherine.cooper@nstarch.com
Website: www.ingredion.com
Contact: Catherine Cooper

## J

**JAMES CROPPER PLC**
*Paper Manufacturer*
Burneside Mills, Kendal, Cumbria, LA9 6PZ
Tel: 01539 722002 Fax: 01539 728088
Website: www.cropper.com
Contact: Patrick Willink

**JARSHIRE LTD**
*Equipment for Converting, Paper & Tissue Industries*
Levels House, 4 Bristol Way, Slough, Berkshire, SL1 3QE
Tel: 01753 825122 Fax: 01753 694653
Email: davidjobson@jarshire.co.uk
Website: www.jarshire.co.uk
Contact: David Jobson

## K

**KEMIRA PULP & PAPER CHEMICALS**
*Specialty Pulp & Paper Chemicals*
Bowling Park Drive, Bradford, Yorkshire, BD4 7TT
Tel: 0780 222 5043 Fax: 01274 762288
Email: james.atkinson@kemira.com
Website: www.kemira.com
Contact: James Atkinson

**KONECRANES UK LTD**
*Electric Overhead Travelling Cranes*
Industrial Crane Division, Peel Park Place, College Milton, East Kilbride, Glasgow, G74 5LR
Tel: 01355 220591 Fax: 01355 263654
Email: gordon.adie@konecranes.com
Contact: Gordon Adie

## M

**MARE UK LTD**
*Producer and supplier of functional chemical products to the paper industry*
Office 20, 53 Stramongate, Kendal, Cumbria, LA9 4BH
Tel: 01539 722611 Mobile: 07768 583374
Website: www.mare.com
Email: scott.wilkinson@mare.com
Contact: Scott Wilkinson

## N

**NALCO LTD**
*Nalco is a leading supplier of water and process treatment services to the Paper Industry*
Novus Business Centre, Office 14, Judson Road, North West Industrial Estate, Peterlee, SR8 2QJ
Tel: +44 0191 5878180
Email: lwallace@nalco.com
Website: www.nalco.com
Contact: Lynne Wallace

## P

**PETROFER**
*PETROFER formulate, produce and supply: industrial manufacturing, board, paper, tissue and converting industries with highly specialised process fluids and chemical products for many applications. PETROFER prides itself on being a technology leader and all products surpass current environmental, H&S and legislative requirements*
Petrofer UK Plc, Harcourt Business Park, Halesfield 17, Telford, Shropshire, TF7 4PW
Tel: +44 01952 580100
Mobile: +44 07974 150957
Fax: +44 01952 580101
Email: s.gregory@petrofer.co.uk
Website: www.petrofer.co.uk
Contact: S. Gregory

**PILZ AUTOMATION TECHNOLOGY**
*Machinery Safety Automation Products, Training and Services to ensure the safety of plant or personnel in the Paper Industry*
Pilz House, Little Colliers Field, Corby, Northants, NN18 8TJ
Tel: +44 01536 462208
Fax: +44 01536 460866
Email: j.harris@pilz.co.uk
Website: www.pilz.co.uk
Contact: Joanne Harris

**POOLE PROJECTS LTD**
*Engineering Consultants*
Unit 28, Eton Business Park, Eton Hill Road. Radcliffe, Manchester, M26 2ZS
Tel: 0161 724 7692
Fax: 0161 724 6544
Email: jwilliams@pooleprojects.co.uk
Website: www.pooleprojects.co.uk
Contact: John Williams

**PROCAL LTD**
*Calibration and maintenance of paper test equipment*
Glebe House, Glebe Road, Ashtead, Surrey, KT21 2NU
Tel: 01372 271313 Fax: 01372 270100
Email: mark@procal.co.uk
Website: www.procal.co.uk
Contact: Mark Ransom

## Q

**QISOFT LIMITED**
*Product and Process Information Software*
Alexander House, Station Brow, Leyland, Lancs, PR25 3NZ
Tel: 01772 641133 Fax: 01772 641155
Email: graeme@qisoft.com
Website: www.qisoft.com
Contact: Graeme Parkinson

## R

**RAKEM LTD**
*Pigments, Fillers, Kaolin Clay, PCC, Talc, Additives*
Wellington Street, Bury, Lancashire, BL8 2BD
Tel: 0161 762 0044 Fax: 0161 762 0033
Email: sales@rakem.co.uk
Website: www.rakem.co.uk
Contact: Kieran Rafferty

**RAUMASTER PAPER OY**
*Finishing systems for Paper Mills (winding, core & broke handling, roll handling & wrapping, warehousing and shipping)*
Raumaster Paper Oy, Isometsäntie 4, FI – 26100 Rauma, Finland
Tel: 00 358 2 8377 4400 Fax: +358 2 8377 4304
Email: Kaarlo.Talvinen@raumaster.fi
Website: www.raumasterpaper.fi
Contact: Kaarlo Talvinen

**ROQUETTE UK LTD**
*Suppliers of native and modified starches and starch derivatives*
Sallow Road, Corby, Northants, NN17 5JX
Tel: 01536 273040
Email: derek.dobbs@roquette.com
Website: www.roquette.com
Contact: Derek Dobbs

## S

**SCHÄFERROLLS GMBH & CO. KG**
*Roll covers for paper, tissue and board*
Benzstrasse 40, 71272 Renningen, Germany
Tel: + 49 (0) 7159 / 806 - 0 Fax: + 49 (0) 7159 / 806- 300
Email: info@schaeferrolls.com
Contact: Adrian Stoll

**SMURFIT KAPPA SSK**
*Paper Manufacturer*
Mount Street, Nechells, Birmingham, West Midlands, B7 5RE
Tel: 0121 327 1381 Fax: 0121 322 6300
Email: nigel.pontin@smurfitkappa.co.uk
Website: www.smurfitkappa.com
Contact: Nigel Pontin

**SMURFIT KAPPA TOWNSEND HOOK**
*Paper Manufacturer*
Mill Street, Snodland, Kent, ME6 5AX
Tel: 01634 240205
Website: www.smurfitkappa.com

**SOFIDEL GROUP UK**
*Tissue production and distribution*
Brunel Way, Baglan Energy Park, Briton Ferry
Neath, SA11 2HZ
Tel: +44 01639 825 380
Fax: +44 01639 825 381
Email: giuseppe.munari@sofidel.com
Website: www.sofidel.com
Contact: Giuseppe Munari

**SONOCO ALCORE**
*Paper Manufacturer*
Stainland Board Mills, Holywell Green, Halifax, Yorkshire, HX4 9PY
Tel: 01422 374741 Fax: 01422 371495
Email: tim.colbeck@sonoco-alcore.net
Website: www.sonoco.com
Contact: Tim Colbeck

**SPRAYING SYSTEMS LTD**
*Spraying Systems Co have a wide range of nozzles and spray bars available to suit all Mill applications and now can offer Brush Shower Headers with Oscillators. We also have a wide selection from our TankJet range for Chest and other tank cleaning duties.*
Farnham Business Park, Weydon Lane,
Farnham, Surrey, GU10 8QT
Tel: 07711 972830
Email: david.yates@spray.com
Website: www.uk.spray.com
www.tankjet.com
Contact: David Yates

## T

**TEST-TECH**
*Testing and Development Service for the Paper Industry*
Website: www.test-tech.co.uk
Contact: Ken Holroyd (Process Analysis and Materials Testing)
Mobile: 07780 667174 Email: ken.holroyd@test-tech.co.uk
Contact: Robert Langley (Fibre Consultant)
Mobile: 07786 136601 Email: robert.langley@test-tech.co.uk
Contact: Richard Saunders (Paper and Print Consultant)
Mobile: 07986 044134 Email: richard.saunders@test-tech.co.uk

**TOSCOTEC S.P.A.**
*Tissue and paper & board machines builder, stock preparation plants, hoods and air systems. Toscotec supplies from complete paper production lines to rebuilds, modernisation projects and even single components.*
Viale Europa 317/F, 55012 Marlia, Lucca, Italy
Tel: +39 0583 40 871 Fax: +39 0583 408 7800
Email: davide.mainardi@toscotec.com
Website: www.toscotec.com
Contact: Davide Mainardi

## U

**UPM-KYMMENE (UK) LTD**
*Newsprint Manufacturer*
Shotton Paper, Weighbridge Road, Shotton,
Deeside, Flintshire, CH5 2LL
Tel: 01244 280000 Fax: 01244 280363
Email: andrew.bronnert@upm.com
Website: www.upm-kymmene.com
Contact: Andrew Bronnert

## V

**VALMET LTD**
*Manufacturing and Refurbishment Engineers for the Paper Industry*
Waterside Business Park, Johnson Road, Eccleshill, Darwen,
Lancashire BB3 3BA
Tel: 01254 819078
Website: www.valmet.com

**VERNACARE LTD**
Folds Road, Bolton, Lancashire, BL1 2TX
Phone: 01204 529494 Fax: 01204 521862
Email: steve.birch@vernagroup.com
Website: www.vernacare.com
Contact: Steve Birch

# Paper, Pulp & Coating Mills in the UK

## AHLSTROM CHIRNSIDE LTD

1 **CHIRNSIDE PAPER MILL**
Chirnside, Duns, Berwickshire, TD11 3JW
Tel: 01890-818303
www.ahlstrom-munksjo.com
*Products*: Teabag, Speciality

2 **MOUNT SION WORKS**
Sion Street, Manchester, M26 3SB
Tel: 0161 725 5320
www.ahlstrom-munksjo.com
*Products*: Pulp mill (10,000tpy)

3 **APSLEY PAPER TRAIL**
Frogmore Paper Mill & Visitor Centre
Apsley, Hemel Hempstead, Herts, HP3 9RY
Tel: 01442-234600
www.thepapertrail.org.uk
*Products*: Fine, Speciality, Artist / Watercolour

4 **ARJOWIGGINS CHARTHAM LTD**
Chartham Paper Mill
Station Road, Chartham, Canterbury, CT4 7JA
Tel: 01227-813500
www.arjowiggins-translucentpapers.com
*Products*: Tracing

5 **ARJOWIGGINS FINE PAPERS LTD**
Stoneywood Mill
Bucksburn, Aberdeen, AB21 9AB
Tel: 01224-802200
www.arjowiggins.com
*Products*: Fine, Industrial (Casting), Security

8 **BILLERUD BEETHAM LTD**
Waterhouse Mills
Beetham, Milnthorpe, Cumbria, LA7 7AR
Tel: 01539-565000
www.billerudkorsnas.com
*Products*: Speciality (food, health care, industrial)

9 **CARLSON FILTRATION LTD**
Butts Mill
Barnoldswick, Lancs, BB18 5HP
Tel: 01282-811000
www.carlson.co.uk
*Products*: Speciality Filter

10 **DE LA RUE INTERNATIONAL LTD**
Overton Mill
Overton, Hampshire, RG25 3JG
Tel: 01256-771990
www.delarue.com
*Products*: Banknote

11 **DE LA RUE SECURITY PAPERS**
Bathford Paper Mills
Bathford, Bath, BA1 7QG
Tel: 01225-858243
www.delarue.com
*Products*: Security (not Banknote)

12 **DS SMITH PAPER**
**KEMSLEY PAPER MILL**
Sittingbourne, Kent, ME10 2TD
Tel: 01795-518900
www.dssmith.com
*Products*: Fluting, Testliner, Plasterboard

## ESSITY

37 **OAKENHOLT MILL**
Oakenholt, Nr Flint, Flintshire, CH6 5PU
Tel: 01352-792500
www.essity.com
*Products*: Tissue

38 **PRUDHOE MILL**
Prudhoe, Northumberland, NE42 6HE
Tel: 01661-806000
www.essity.com
*Products*: Tissue

39 **STUBBINS MILL**
Stubbins Lane, Ramsbottom,
Bury, Lancs, BL0 0NH
Tel: 01706-283000
www.essity.com
*Products*: Tissue

74 **TAWD MILL**
Pimbo Road, Skelmersdale, WN8 9PD
Tel: 01695-721133
www.essity.com
*Products*: Tissue

40 **TRAFFORD MILL**
Trafford Park Road, Trafford Park,
Manchester, M17 1EQ
Tel: 0161-888-6002
www.essity.com
*Products*: Tissue

## FOURSTONES PAPER MILL CO LTD

14 **SAPPHIRE MILL**
Leslie, Glenrothes, Fife, KY6 3AB
Tel: 01592-746900
www.fourstonespapermill.co.uk
*Products*: Towel

15 **SOUTH TYNE MILL**
Fourstones, Hexham, Northumberland, NE46 3SD
Tel: 01434-602444
www.fourstonespapermill.co.uk
*Products*: Creped grades

19 **FUTAMURA CHEMICAL UK LTD**
Wigton, Cumbria, CA7 9BG
Tel: 01697-341212
www.futamuracellulose.com
*Products*: Regenerated Cellulose Film

16 **GLATFELTER UK LTD**
Lydney Paper Mill
Church Road, Lydney, Gloucestershire, GL15 5EJ
Tel: 01594-842235
www.glatfelter.com
*Products*: Teabag

6 **HIGHER KINGS MILL LTD**
Higher Kings Mill
Cullompton, Devon, EX15 1QJ
Tel: 01884-836300
www.higherkings.co.uk
*Products*: Recycled coloured paper and board

17 **HOLLINGSWORTH & VOSE COMPANY LTD**
Postlip Mills
Winchcombe, Cheltenham,
Gloucestershire, GL54 5BB
Tel: 01242-602227
www.hollingsworth-vose.com
*Products*: Speciality Filter, Battery Separator

18 **IGGESUND PAPERBOARD (WORKINGTON) LTD**
Siddick, Workington, Cumbria, CA14 1JX
Tel: 01900-601000
www.iggesund.com
*Products*: Folding Boxboard

20 **JAMES CROPPER PLC**
Burneside Mills
Kendal, Cumbria, LA9 6PZ
Tel: 01539-722002
www.cropper.com
*Products*: Fine, Industrial

**KIMBERLY CLARK LTD**

21 **BARROW MILL**
Barrow-in-Furness, Cumbria, LA14 4QS
Tel: 01229-495000
www.kimberly-clark.com
*Products*: Tissue

22 **COLESHILL MILL**
Aber Road, Flint, Flintshire, CH6 5EX
Tel: 01352-805000
www.kimberly-clark.com
*Products*: Tissue

23 **DELYN MILL**
Aber Road, Flint, Flintshire, CH6 5EX
Tel: 01352-805000
www.kimberly-clark.com
*Products*: Hand Towel

24 **NORTHFLEET MILL**
Crete Hall Road, Gravesend, DA11 9AD
Tel: 01474-336000
www.kimberly-clark.com
*Products*: Tissue

25 **LENZING FIBERS GRIMSBY LTD**
Energy Park Way, Grimsby, DN31 2TT
Tel: 01472-244700
www.lenzing.com
*Products*: Lyocell fibre (45,000tpy) from wood pulp

**NORTHWOOD TISSUE LTD**

26 **NORTHWOOD TISSUE LTD (DISLEY)**
Waterside, Disley, Cheshire, SK12 2HW
Tel: 01663-762701
www.northwood.co.uk
*Products*: Tissue

27 **NORTHWOOD TISSUE LTD (LANCASTER)**
Lansil Way, Caton Road, Lancaster, LA1 3PQ
Tel: 01524-843678
www.northwood.co.uk
*Products*: Tissue

28 **NORTHWOOD & WEPA**
Bridgend Paper Mills
Llangynwyd, Nr Bridgend,
Mid Glamorgan, CF34 9RS
Tel: 01656-684500
www.northwoodwepa.com
*Products*: Tissue

29 **PALM PAPER LTD**
King's Lynn, Norfolk, PE34 3AL
Tel: 01553-782222
www.palm.info
*Products*: Standard Newsprint (from 100% RCF)

32 **PRESTON BOARD & PACKAGING LTD**
Romiley Board Mill
Oakwood Road, Romiley, Cheshire, SK6 4DZ
Tel: 0161-430-6061
www.romileyboard.co.uk
*Products*: Unlined Chipboard, Cardboard (tubes, edge protection, layer pad, sheets)

**PURICO GROUP LTD**

33 **DEVON VALLEY MILL LTD**
Hele, Exeter, Devon, EX5 4PL
Tel: 01392-881731
www.purico.co.uk
*Products*: Teabag, Overlay

34 **UNION PAPERTECH LTD**
Simpson Clough Mill, Ashworth Road, Heywood,
Lancashire, OL10 4BE
Tel: 01706-364121
www.purico.co.uk
*Products*: Teabag, Coffee Filter

35 **SAICA CONTAINERBOARD**
144 Manchester Road, Carrington
Manchester, M31 4QN
Tel: 0161-7767000
www.saica.com
*Products*: Fluting & testliner

36 **SIDCOT GROUP**
Chesterfield Paper Mill
Walton, Chesterfield, S40 2PH
Tel: 01246-558557
www.matryx-hygiene.com
*Products*: Tissue

## SMURFIT KAPPA GROUP

41
### SMURFIT KAPPA SSK
Mount Street, Nechells, Birmingham, B7 5RE
Tel: 0121-327-1381
www.smurfitkappa.com
*Products*: Corrugated Case Medium (Recycled Fluting, Testliner 2 & 3)

42
### SMURFIT KAPPA TOWNSEND HOOK
Mill Street, Snodland, Kent, ME6 5AX
Tel: 01634-240205
www.smurfitkappa.com
*Products*: Corrugating Medium, Testliner 2 & 3

## SOFIDEL GROUP

43
### INTERTISSUE
Brunel Way, Neath, SA11 2HZ
Tel: 01639-825380
www.sofidel.com
*Products*: Tissue

44
### NORTHERN TISSUE GROUP LTD
Lansil Way, Lancaster, LA1 3QY
Tel: 01524-844600
www.sofidel.com
*Products*: Tissue

45
### SOFIDEL UK LTD
Waterside Road, Hamilton Industrial Park
Leicester, LE5 1TZ
Tel: 01162-460888
www.sofidel.com
*Products*: Tissue

46
## SONOCO BOARD MILLS LTD
Stainland Mills
Holywell Green, Halifax, West Yorkshire, HX4 9PY
Tel: 01422-374741
www.sonocoalcore.com
*Products*: Coreboard, Laminate Board, Display Board Middles, Chipboard

47
## ST CUTHBERTS MILL LTD
Wells, Somerset, BA5 1AG
Tel: 01749-672015
www.stcuthbertsmill.com
*Products*: Artist / Watercolour

49
## TULLIS RUSSELL COATERS LTD
Church Street, Bollington
Macclesfield, Cheshire, SK10 5QF
Tel: 01625-573051
www.tullisrussell.com
*Products*: Coated papers

50
## TWO RIVERS PAPER COMPANY
Pitt Mill, Roadwater, Watchet, Somerset, TA23 0QS
Tel: 01984-641028
www.tworiverspaper.com
*Products*: Artist / Watercolour

## UPM KYMMENE (UK) LTD

51
### CALEDONIAN PAPER
Meadowhead Road, Shewalton, Irvine, KA11 5AT
Tel: 01294-312020
www.upm.com
*Products*: Coated Magazine

52
### SHOTTON PAPER,
Shotton, Deeside, Flintshire, CH5 2LL
Tel: 01244-280000
www.upm.com
*Products*: Standard Newsprint (from 100% RCF)

31
## WEIDMANN WHITELY LTD.
Pool Paper Mills
Pool-in-Wharfedale, Otley,
West Yorkshire, LS21 1RP
Tel: 01132-027000
www.weidmann-electrical.com
*Products*: Insulation, Pressboard

## CONTACT DETAILS FOR RELEVANT NATIONAL GROUPS / ASSOCIATIONS

| | |
|---|---|
| Alliance for Beverage Cartons and the Environment (ACE) UK | www.ace-uk.co.uk |
| British Association of Paper Historians (BAPH) | www.baph.org.uk |
| British Paper Machinery Suppliers Association (BPMSA) | www.picon.com |
| British Printing Industries Federation – Cartons (BPIF Cartons) | www.bpifcartons.org.uk |
| British Wood Pulp Association (BWPA) | www.bwpa.org.uk |
| Confederation of Paper Industries (CPI) | www.paper.org.uk |
| Forest Stewardship Council (FSC) UK | www.fsc-uk.org |
| Packaging Federation | www.packagingfedn.co.uk |
| Paper and Board Association (P&BA) | www.paperandboard.org.uk |
| The Paper Industry Gold Medal Association | www.papergoldmedal.org.uk |
| Programme for the Endorsement of Forest Certification (PEFC) UK | www.pefc.co.uk |
| Recycling Association | www.therecyclingassociation.com |
| Rubber and Plastic Research Association (RAPRA) | www.rapra.org |
| Sheet Plant Association (SPA) | www.sheetplantassociation.com |
| Two Sides | www.twosides.info |
| The Worshipful Company of Stationers and Newspaper Makers | https://stationers.org |

# Panel Board Mills in UK & Ireland

71 **ARMSTRONG WORLD INDUSTRIES LTD (ceiling tiles)**
Gateshead, Tyne & Wear NE11 OSP
Tel: 0191 497 1000
www.armstrongceilings.com

54 **EGGER BARONY LTD (particle)**
Barony Road, Auchinleck, KA18 2LL
Tel: 01290-426026
www.egger.com

55 **EGGER (UK) LTD (particle)**
Anick Grange Road, Hexham, Northumberland, NE46 4JS
Tel: 01434-602191
www.egger.com

56 **KRONOSPAN LTD (particle & MDF)**
Holyhead Road, Chirk, Wrexham, LL14 5NT
Tel: 01691-773361
http://uk.kronospan-express.com

57 **MEDITE EUROPE LTD (MDF)**
Redmondstown, Clonmel, Co. Tipperary, Ireland
Tel: +353 526 182 300
https://mdfosb.com

58 **NORBORD COWIE (particle & MDF)**
Station Road, Cowie, Stirlingshire, FK7 7BQ
Tel: 01786-812921
www.norbord.co.uk

59 **NORBORD INVERNESS (OSB)**
Morayhill, Dalcross, Inverness, IV2 7JQ
Tel: 01463-792424
www.norbord.co.uk

60 **NORBORD SOUTH MOLTON (particle)**
South Molton, Devon, EX36 4HP
Tel: 01769-572991
www.norbord.co.uk

61 **SMARTPLY EUROPE LTD (OSB)**
Belview, Slieverue, Waterford, Ireland
Tel: +353 51 851 233
https://mdfosb.com

62 **SUNDEALA LTD (softboard-type material)**
Middle Mill
Cam, Dursley, Gloucestershire, GL11 5LQ
Tel: 01453-708689
www.sundeala.co.uk

WOOD PANEL INDUSTRY FEDERATION (WPIF)
Autumn Park Business Centre
Dysart Road, Grantham
Lincolnshire, NG31 7EU
Tel: +44 (0) 1476 512 381
www.wpif.org.uk

EUROPEAN PANEL FEDERATION (EPF)
24, rue Montoyer box 20
B-1000 Brussels
Belgium
Tel: +32 2 556 25 89
http://europanels.org

# Moulded Pulp Mills in the UK & Ireland

72 **ENKEV (UK) LTD**
Enkev House, Silloth Airfield Industrial Estate, Silloth, Cumbria CA7 4NS
Tel: 01697 332 600
www.enkev.com

66 **HUHTAMAKI (LURGAN) LTD**
41 Inn Road, Dollinsgtown, Lurgan, Co. Armagh, BT66 7JN
Tel: 02838 327 711
www.huhtamaki.com

73 **JAMES CROPPER PLC**
Burneside Mills
Kendal, Cumbria, LA9 6PZ
Tel: 01539-722002
www.cropper.com

67 **MOULDED FIBRE PRODUCTS LTD**
Flixborough Industrial Estate
Scunthorpe, Lincolnshire, DN15 8SD
Tel: 01724 847 207
http://mouldedfibreproductsltd.co.uk

68 **PAPER PULP SOLUTIONS**
Pulp Mill House, Banton Road, Glasgow, G65 0QG
Tel: 01236 829 052
www.paperpulpsolutions.co.uk

63 **ROBERT CULLEN LTD**
10 Dalsholm Avenue, Dawsholm Industrial Estate, Glasgow, G20 0TS
Tel: 0141 945 2222
www.cullen.co.uk

69 **VERNACARE LTD**
Folds Road, Bolton, Lancashire, BL1 2TX
Tel: 01204 529 494
www.vernacare.com

# Map of the Mills in the UK & Ireland


## Key to entries

- Paper Mill
- Panel Board Mill
- Moulded Pulp Mill

# Mills in the Benelux Region

B1
**AHLSTROM MALMEDY S.A.**
Av. Du Pont de Warche, B-4960 Malmedy
Tel: +32 (0) 80 79 54 11
www.ahlstrom.com

B2
**BURGO ARDENNES S.A.**
Rue de la Papeterie 1, B-6760 Virton
Tel: +32 (0)63 - 58 71 11
www.burgo.com

N1
**COLDENHOVE PAPIER B.V.**
D.W. van Vreeswijklaan 9
6961 LG Eerbeek
Tel: +31 (0)313 - 67 06 70
www.coldenhove.com

N2
**CROWN VAN GELDER B.V.**
Postbus 30, 1950 AA Velsen-Noord
Tel: +31 (0)251 - 26 22 33
www.cvg.nl

N23
**DE SCHOOLMEESTER PAPIERMOLEN**
Guispad 3, NL-1551 SX Westzaan
Tel: +31 (0)75 - 621 44 65
https://zaanschemolen.nl

N18
**D.S. SMITH PAPER – De Hoop Mill**
Harderwijkerweg 41, 6961 GH Eerbeek
Tel: +31 (0)313 - 67 79 22
www.dssmith.com

B5
**ECOPLA BOOMPLATEN**
Vaucampslaan 84, 1654 Huizingen
Tel: +32 (0)23 56 57 89
www.boomplaten.be

N26
**ENKEV B.V.**
De Toek 2, P.O. Box 3, 1130 AA Volendam
Tel: +31 (0)299 - 36 43 55
www.enkev.com

N4
**ESKA B.V.**
Noorderstraat 394, 9611 AW Sappemeer
Tel.: +31 (0)598 - 31 89 11
www.eska.com

N5
**ESKA B.V.**
M. Veningastraat 114-116, 9601 KJ Hoogezand
Tel: +31 (0)598 - 31 89 11
www.eska.com

N6
**ESSITY CUIJ**
Lange Linden 22, 5433 NC Katwijk NB
Tel: +31 (0)485 - 33 93 39
www.essity.com

B10
**ESSITY S.A.**
Rue de la Papeterie 2, BE-4801 Stembert
Tel: +32 (0)87 - 30 66 11
www.essity.com

N17
**ESSITY SUAMEER**
Solcamastraat 24, 9262 ND Suameer
Tel: +31 (0)511 - 46 66 66
www.essity.com

N27
**HUHTAMAKI NEDERLAND B.V.**
Zuidelijke Industrieweg 3-7, 8801 JB Franeker,
Tel: +31 (0)517 - 39 93 99
www.huhtamaki.com

L1
**KRONOSPAN LUXEMBOURG S.A. (OSB, MDF)**
Z.I. Gadderscheier, B.P. 109, L - 4902 Sanem
Tel: +35 (0)25 - 90 31 11
http://lu.kronospan-express.com

N8
**MAYR-MELNHOF EERBEEK B.V.**
Coldenhovenseweg 12, 6961 ED Eerbeek
Tel: +31 (0)313 - 67 51 11
www.mm-karton.com

N9
**MEERSSEN PAPIER B.V.**
Weert 78, 6231 SB Meerssen
Tel: +31 (0)433 - 66 35 00
www.meerssen-papier.com

N24
**NEDERLANDS OPENLUCHTMUSEUM**
(The Netherlands Open Air Museum)
Hoeferlaan 4, 6816 SG Arnhem
Tel: +31 (0)263 - 57 61 11
www.openluchtmuseum.nl

B13
**NORBORD N.V. (OSB)**
Eikelaarstraat 33, 3600 Genk
Tel: +32 (0)89 - 50 03 00
http://norbord.co.uk

N22
**OBERTHUR FIDUCIAIRE SAS**
Usine de VHP, 7339 GS Ugchelen
Tel: +31 (0)55 - 533 21 32
www.oberthur-fiduciaire.com

N28
**PAPER FOAM**
Hermesweg 22, 3771 ND Barneveld
Tel: +31 (0)342 - 40 16 67
www.paperfoam.com

B12
**PAPER MILL HERISEM**
Fabriekstraat 20, B-1652 Alsemberg, Brussels
Tel: +32 (0)473 38 32 30
www.herisem.be

N25
**PAPIERFABRIEK DE MIDDELSTE MOLEN**
Kanaal Zuid 497, 7371 GL Loenen (Veluwe)
Tel: +31 (0)55 - 505 29 11
www.demiddelstemolen.nl

N3
**PAPIERFABRIEK DOETINCHEM B.V.**
Terborgseweg 52, 7005 BB Doetinchem
Tel: +31 (0)314 - 34 79 11
www.papierfabriekdoetinchem.nl

# Map of the Mills in the Benelux Region

**Key to entries**

- Paper Mill
- Panel Board Mill
- Moulded Pulp Mill
- Working Museum


**CONTACT DETAILS FOR SELECTED EUROPEAN GROUPS / ASSOCIATIONS**

| | |
|---|---|
| Alliance for Beverage Cartons and the Environment (ACE) | www.ace.be |
| Confederation of European Paper Industries (CEPI) | www.cepi.org |
| European Carton Makers Association (ECMA) | www.ecma.org |
| European Federation of Corrugated Board Manufacturers (FEFCO) | www.fefco.org |
| European Liaison Committee for Pulp & Paper (EUCEPA) | www.eucepa.eu |
| European Recovered Paper Association (ERPA) | www.euric-aisbl.eu |
| European Tissue Symposium (ETS) | https://europeantissue.com |
| International Association of the Deinking Industry (INGEDE) | www.ingede.org |

N10 **PARENCO B.V.**
Veerweg 1, 6871 AV Renkum
Tel: +31 (0)317 - 36 19 11
www.parenco.com

N29 **PRESSWOOD INTERNATIONAL B.V. (particle)**
Lokhorstweg 13a-27, 3851 SE Ermelo
Tel: +31 (0)341 - 55 33 79
www.presswood.nl

B9 **SAPPI LANAKEN N.V.**
Montaigneweg 2, 3620 Lanaken
Tel: +32 (0)89 - 71 99 55
www.sappi.com

N15 **SAPPI MAASTRICHT B.V.**
Biesenweg 16, 6211 AA Maastricht
Tel: +31 (0)433 82 22 22
www.sappi.com

N19 **SCHUT PAPIER**
Kabeljauw 2, 6866 NE Heelsum
Tel: +31 (0)317 - 31 91 10
www.schutpapier.nl

N20 **SMURFIT KAPPA ROERMOND PAPIER B.V.**
Mijnheerkensweg 18, 6041 TA Roermond
Tel: +31 (0)475 - 38 44 44
www.smurfitkappa.com

B7 **SOFIDEL BENELUX N.V.**
Adolf Stocletlaan 3, 2570 Duffel
Tel: +32 (0)15 - 30 06 11
www.sofidel.com

N11 **SOLIDUS SOLUTIONS BOARD B.V.**
Hoofdstraat 34, 9693 ZG Bad Nieuweschans
Tel: +31 (0)50 - 30 33 000
http://solidus-solutions.com

N12 **SOLIDUS SOLUTIONS BOARD B.V.**
Robertweg 2, 7741 KX Coevorden
Tel: +31 (0)50 - 30 33 000
http://solidus-solutions.com

N13 **SOLIDUS SOLUTIONS BOARD B.V.**
Halmstraat 1-3, 9745 BC Groningen-Hoogkerk
Tel: +31 (0)50 - 30 33 000
http://solidus-solutions.com

N14 **SOLIDUS SOLUTIONS BOARD B.V.**
W.H. Bosgrastraat 82, 9665 PH Oude-Pekela
Tel: +31 (0)50 - 30 33 000
http://solidus-solutions.com

N21 **SOLIDPACK B.V.**
Voorsterweg 38, 7371 GC Loenen
Tel: +31 (0)55 - 505 82 22
www.smart-packaging-solutions.com

B15 **SPANOLUX SPRL (MDF)**
Zoning Industriel de Burtonville,
Rue de la Forêt 2, 6690 Vielsalm
Tel: +32 (0)80 - 29 27 10
www.spanolux.com

B11 **STORA ENSO LANGERBRUGGE PAPER**
Wondelgemkaai 200, 9000 Gent
Tel: +32 (0)92 - 57 72 11
www.storaenso.com

N30 **TRESPA INTERNATIONAL B.V. (MDF)**
Wetering 20, 6002 SM Weert
Tel: +31 (0)495 - 45 83 58
www.trespa.com

B14 **UNILIN (particle)**
Ingelmunstersteenweg 229, 8780 Oostrozebeke
Tel: +32 (0)56 - 66 70 21
www.unilinpanels.com

B8 **VPK PAPER N.V.**
Oude Baan 120, B-9200 Dendermonde
Tel: +32 (0)52 - 26 19 11
www.vpkgroup.com

N7 **WEPA NEDERLAND B.V.**
Boutestraat 125, 6071 JR Swalmen
Tel: +31 (0)88 0183 000
www.wepa.nl

## *Useful contact details for Benelux data:*

### BELGIUM
COBELPA ASBL
Association of the Belgian Pulp, Paper and Board Producers
Boulevard de la Plaine 5, 1050 Brussels, Belgium
T +32 2 646 64 50
F +32 2 646 82 97
E cobelpa@indufed.be
www.cobelpa.be
Year of Foundation 1940

### THE NETHERLANDS
VNP
Royal Netherlands' Paper and Board Association
Kruisweg 761, 2132 NE Hoofddorp, Postbus 731, 2130 AS Hoofddorp
T +31 20 654 30 55
F +31 20 654 30 64
E info@vnp.nl
http://vnp.nl
Year of Foundation 1904

# Mills in the Middle East Region

## BAHRAIN

### OLAYAN KIMBERLY-CLARK (OKC)
Askar, Ti
http://olayan.com

## IRAN

### ARIAN CELLULOSE SANAT
Alborz, Hy, Ti
www.golrang.com

### ARIAN SINA INC.
Sari, MDF
www.ariansina.com

### ARTA DECOR
Ardebil, De
www.artagroup.com

### AZERBAIJAN NARMEH PAPER INDUSTRIES
Tabriz, Ti

### CHOUKA IRAN WOOD & PAPER INDUSTRIES INC.
Gilan, Pa
www.chouka.com

### GOLBONEH PARS INDUSTRIAL
Tehran, Ti

### HARIR KHUZESTAN CO.
Haft Tappeh Industrial City, Ti
www.harirpaperco.com

### IRAN OSB
Tehran, OSB
www.iranosb.com

### IRAN PAPYRUS CO. LTD.
Saveh, Bo

### ISOFAM
Tehran, MDF
www.isofam.ir

### KPM KAHRIZAK PAPER MILLS
Tehrán, Pa
www.kpmpaper.com

### LATIF PAPER CO.
Hashtgerd, Ti
www.latifpaper.ir

### PARS HAYAT PRODUCTION CO.
Zencan, Hy, Ti
www.hayat.com

### PARS NEOPAN
Nashtaroud, MDF / PB
http://parsneopan.com

### PARS PAPER INDUSTRIAL GROUP
Haft Tappeh, P&W / Pa / Pulp
http://parspaper.ir

### MAZANDARAN WOOD AND PAPER INDUSTRIES
Sair, Ne / P&W / Pa
http://en.mazpaper.com

### RAHAN TAVAN CO.
Tehran, MDF / PB
www.rahantavan.com

### SANAYE CHOOBE KHAZAR CO.
Amol City, MDF
www.choobekhazar.com

### SUGARCANE DEVELOPMENT AND COMMERCE DEVELOPMENT COMPANY
Shoeybieh, MDF
www.iran-sugar.com

### ZARRIN BARG PERSIA CO
Saveh, Ti
www.bargezarrin.com

## ISRAEL

### HADERA PAPER GROUP
Hadera, Fi / Pa / P&W / Se
www.hadera-paper.co.il/en

### HARTMANN-MAI LTD.
Nathanya, MP
www.hartmann.dk

### MILOUBAN (M.C.P.) LTD.
Nahariya, Pu (cotton)
www.milouban.com

### SHANIV PAPER INDUSTRIES LTD.
Ofakim, Ti
www.shaniv.com

### TUT NEYAR
Zichron-Ya`akov, Hand
http://tutneyar.wix.com/tutneyar

## JORDAN

### AL-KEENA HYGIENIC PAPER MILL CO. LTD.
Amman, Ti
www.nuqultissue.com

### AL-SNOBAR HYGIENIC PAPER MILL CO. LTD.
Amman, Ti
www.nuqulgroup.com

### JORDAN PAPER AND CARDBOARD FACTORIES CO. LTD.
Awajan–Zarqa, Bo / Pa
www.jordanpaper.com

## KUWAIT

### AL OULA PAPER MANUFACTURING CO.
Shuaiba, Pa

### GULF PAPER MANUFACTURING
Fahaheel, CB / Pa / Ti
www.gulfpaper.com

### UNITED PAPER INDUSTRIES CO.
Shuaiba, Pa / Sa
www.upi.com.kw

## LEBANON

### MIMOSA SANITARY PAPER COMPANY
Kaa El Rim, Pa / Ti
www.mimosa.com.lb

### SICOMO
Kab-Elias, Bo / CB / Pa
www.sicomo.com.lb

### SIPCO GANDOUR STE. INDUSTRIELLE DE PAPIER ET DE CARTON ONDULE
Kafarshima, Bo / Re / MP
http://sipco0.tripod.com

### SOLICAR SOCIÉTÉ LIBANAISE DE CARTON
Sin El Fil, Bo / Pa
www.solicar.com

### UNIPAK TISSUE MILL
Halat, Ti
www.indevcopapermaking.com

## QATAR

### AL SUWAIDI PAPER FACTORY
Doha, Pa
www.alsuwaidipaper.com

### ELITE PAPER RECYCLING
Doha, Pa
www.eprqatar.com

## SAUDI ARABIA

### ARAB PAPER MANUFACTURING (WARAQ)
Dammam, CB / Pa
www.waraq.com

### GULF PAPER INDUSTRIES FACTORY
Riyadh, Kr / Pa / Ti
www.alrajhigroup.com

### MADA NONWOVENS COMPANY LTD.
Jubail Industrial City, NW
www.madanonwovens.com

### MIDDLE EAST PAPER CO. (MEPCO)
Jeddah, Pa
www.mepco.biz

### OBEIKAN PAPER MILL
Riyadh, Bo
www.obeikan.com.sa

### SAUDI PAPER MANUFACTURING CO.
Dammam, Ti
www.saudipaper.com

## SYRIA

### ARAB COMPANY FOR PAPER PRODUCTS J.S.C. (ARAPEPCO)
Aleppo, Bo / Pa / Re
www.arapepco.com

### DINATEX PAPER MANUFACTURING
Damascus, Ti

### ORIENTAL PAPER (LANATEX)
Damascus, Ti

### PULP AND PAPER MILL
Dayr az Zawr

### SAFFOURY PAPER MILL INDUSTRIES CO.
Damascus, Ti
www.saffoury.com

### SYROPAPER (AZZOUZ GROUP)
Damascus, Kr / Pa / Sa

### THE MEDITERRANEAN MILLS
Jableh, Ti

## UNITED ARAB EMIRATES

### ABU DHABI NATIONAL PAPER MILL (ADNIB)
Abu Dabi, Ti
www.adnpm.ae

### AL NAKHEEL PAPER MILL
Abu Dhabi, Ti
www.finehh.com

### AR RAGI PAPER IND.
Abu Dhabi, Hand

### CROWN PAPER MILLS
Ajman, Ti
www.crownpapermill.com

### GULF PAPER MANUFACTURING FZCO
Jebel Ali, CB / Pa
www.gulfpaper.com/GPMFZCO.htm

### ITTIHAD PAPER MILL LLC (IN 2018)
Industrial City of Abu Dhabi, Ti
www.ittihadinvestment.ae

### QUEENEX HYGIENE PAPER MFG L.L.C.
Abu Dhabi, Ti
http://qhpm.ae

### STAR PAPER MILL LTD. (IN 2018)
Abu Dhabi, Ti

### UMM AL QUWAIN PAPER PRODUCTS
Uum Al Qwain, CB / Pa
www.uaqpaper.ae

### UNION PAPER MILLS
Dubai, CB / Pa
www.upm.ae

**PRODUCT KEY – see p48**


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# Mills in the Eastern European Region

*Excluding Russian Federation; Including: Estonia, Greece, Latvia, Lithuania & Turkey.*

## ALBANIA

### EDIPACK
Durrës, Pa
www.edipack.al

## ARMENIA

### BUMIZ PAPER MILL
Yerevan

### TUKHTARD TARA LIMITED
Yerevan, Pa

## AZERBAIJAN

### AZERKARTON
Baku, Pa

### AZERSUN
Sumgayit, Pa / Re / Ti
www.azersun.com

## BELARUS

### BOBRUISK FIBERBOARD FACTORY
Bobruisk, HB
www.renaissance.by

### COOO "EXCLUSIVE"
Grondo, Ti
www.excl.by

### DOBRUSH PAPER MILL GEROI TRUDA JSC
Dobrush, P&W / Pa / Pr
www.bellesbumprom.by

### JSC BORISOVDREV
Minsk, MDF
www.borisovdrev.by

### JSC GOMELDREV
Gomel, MDF
http://bellesbumprom.by

### JSC PAPER MILL "KRASNAYA ZVEZDA"
Chashniki, Bo / Pa
www.1886red-star.by

### JSC MOSTOVDREV
Mosty, MDF
www.mostovdrev.com

### JSC RECHITSADREV
Rechitsa, PB
http://rechdrev.by

### JSC SCPM "ALBERTIN"
Slonim, Bo / Pa / Ti
http://albertin.by

### JSC SVETLOGORSKIY PULP AND PAPER INTEGRATED WORKS, OJSC
Svietlogorsk, Pa / Pu (wood)
www.sckk.by

### KRONOSPAN FLLC
Smorgon, PB
www.kronospan-worldwide.com

### KRONOSPAN OSB MOGILEV
Mogilev, OSB
www.kronospan-worldwide.com

### MOZYRSKY DOK
Mozyr, Ins
http://bellesprom.com

### OSJC RETCHIZADREV
Retchiza, PB

### PAPER MILL OF GOZNAK
Borisov, Fi / P&W / Pa
www.goznakpaper.by

### RUE ZAVOD GAZETNOY BUMAGI
Shklov, Ne / P&W / De
www.asnova.name/en/

### SPARTAK PAPER MILL JSC
Shklov, Bo / Pa / Ti / Wa
www.bfs.by

## BOSNIA AND HERZEGOVINA

### NATRON-HAYAT D.O.O.
Maglaj, Kr / Pa / Pu (wood) / Re
www.natron-hayat.ba

### SHP CELEX A.D.
Banja Luka, Hy / Ti
www.shpgroup.eu

## BULGARIA

### ALFA WOOD
Varna, PB
www.alfawood.gr

### DS SMITH
Pazardzhik, Pa
www.dssmith.com

### FAZERLES AD
Silistra, HB
http://fazerles.com

### KASTAMONU BULGARIA A.D
Pavel Banya, PB
www.kastamonuentegre.com.tr

**ZERTIS GROUP**
Belovo, Hy / Ti
www.zeritisgroup.com

**KOSTENETS-HHI S.A.**
Kostenets, Pa / Ti
www.hhi-bg.com

**KRONOSPAN BULGARIA EOOD**
Burgas, OSB
www.kronospan-worldwide.com

**KRONOSPAN BULGARIA EOOD**
Veliko Tarnovo, PB
www.kronospan-worldwide.com

**MONDI STAMBOLIJSKI EAD**
Stamboliyski, Pa
www.mondigroup.com

**NOVA KNIZHNA FABRIKA**
Sofia, Bo / Pa / Re / Sp
www.nkfabrika.com

**SVILOCELL EAD**
Svishtov, Pu (wood)
www.svilosa.bg

**WELDE BULGARIA AD**
Troyan, HB
www.welde.bg

## CROATIA

**BELIŠĆE PAPER MILL**
Belišće, Pa / Pu (wood)
www.dssmith.com

**CARDBOARD S.R.O.**
Otrokovice, Bo
www.cardboard.cz

**HARTMANN PAPIRNA AMBALAZA D.O.O.**
Koprivnica, MP
www.hartmann.dk

**KRONOSPAN CRO LTD.**
Bjelovar, PB
www.kronospan-worldwide.com

**PAN-PAPIRNA INDUSTRIJA D.O.O.**
Donji Andrijevci, Pa
www.pan-paper.hr

**PAN-PAPIRNA INDUSTRIJA D.O.O.**
Zagreb, Bo / Pa
www.pan-paper.hr

## CZECH REPUBLIC

**BIOCEL PASKOV A.S.**
Paskov, Pu (wood)
www.biocel.cz

**CEREPA A.S.**
Červená Řečice, Hy / Ti
www.cerepa.cz

**EMBA S.R.O.**
Paseky nad Jizerou, Bo / Sp
www.emba.cz

**HUHTAMAKI CESKA REPUBLIKA A.S.**
Okříšky, MP / Pa / Th
www.huhtamaki.com

**JIP-PAPIRNY VETRNI A.S.**
Větřní, Pa / P&W / Sp
www.jip.cz

**KAVALIER TEC S.R.O.**
Bělá pod Bezdězem, Bo / Pa
www.papirny-bela.cz

**KORONA CZ S.R.O.**
Lochovice, Bo
www.korona.cz

**KRONOSPAN CR SPOL. SR. O.**
Jihlava, OSB
www.kronospan-worldwide.com

**KRPA HOLDING CZ, A.S.**
Hostinné, Fi / Pa / P&W / Sp
www.krpa.cz

**MONDI STETI A.S.**
Štětí, Pa / Sa
www.mondigroup.com.

**OP PAPIRNA S.R.O.**
Olšany, Th / Sp
www.delfortgroup.com

**PAPOS V.O.S.**
Ostrov, Bo
www.papos.cz

**SEVEROCESKA PAPIRNA S.R.O.**
Novosedlice, Pa / Sp / Wa
www.sevpap.cz

**SMURFIT KAPPA CZECH S.R.O. ZAVOD MORAVA PAPER**
Zimrovice, Pa
www.smurfitkappa.com

**SPM - SECURITY PAPER MILL, A.S.**
Štětí, Se / Sp
www.spm.cz

**TRIDAS PULP S.R.O.**
Valašské Meziříčí, MP
www.tridas-pulp.cz

## ESTONIA

### ESTONIAN CELL AS
Kunda, Pu (BCTMP)
www.estoniancell.ee

### GOPULP
Tartu, MP
http://gopulp.ee

### HORIZON PULP & PAPER
Kehra, Kr / Sa / Sp / Ti
www.horizon.ee

### RÄPINA PABERIVABRIK AS
Räpina, Fi / Pa
www.rappin.ee

### SKANO FIBREBOARD
Pärnu, HB
http://fibreboard.skano.com

## GREECE

### AKRITAS S.A.
Alexandroupoli, PB
www.akritas.gr

### ALFA WOOD
Grevena, MDF
www.alfawood.gr

### ALFA WOOD
Larissa, MDF
www.alfawood.gr

### ELINA KOMOTINI PAPER MILL
Komotini, Pa / Ti
www.komotinipaper.gr

### FTHIOTIS PAPER MILL S.A.
Moskhatón, Bo
www.elpack.gr

### MAXI PAPER MILL
Thessaloniki, TI
www.maxi.gr

### MEL MACEDONIAN PAPER MILLS S.A.
Thessaloniki, Bo
www.melpaper.com

### PAPYROS PAPER MILL S.A.
Katerini, Ti
www.sofidel.com

## HUNGARY

### ALBA PULP KFT.
Szekesfehervar, MP
www.albapulp.hu

### DIPA ZRT.
Miskolc, Se
www.dipa.hu

### DUNAFIN KFT.
Dunaújváros, La / Pu (TMP)
www.delfortgroup.com

### HAMBURGER HUNGARIA LTD.
Dunaújváros, Pa
www.hamburger-hungaria.com

### HARTMANN HUNGARY KFT.
Ács, MP
www.hartmann.dk

### KRONOSPAN MOFA
Mohács, MDF
www.kronospan-worldwide.com

### KRONOSPAN MOFA
Szombathely, PB
www.kronospan-worldwide.com

### PULP CONCEPT KFT.
Budapest, MP
http://pulpconcept.com

### SWISS KRONO KFT.
Vásárosnaményi, OSB
www.swisskrono.hu

### VAJDA PAPÍR KFT (in 2018)
Dunafoldvar, Ti
http://vajdapapir.hu

### VAJDA PAPÍR KFT
Soroksár, Ti
http://vajdapapir.hu

## LATVIA

### JELD-WEN
Aizkraukle, MDF
www.jeld-wen.lv

### JUGLAS PAPIRS SIA
Riga, Bo / Pa / P&W
www.juglaspapirs.lv

### KRONOSPAN RIGA
Riga, OSB
www.kronospan-worldwide.com

### SIA V.L.T.
Valmiera, MP
www.eggbox.lv

## LITHUANIA

### GRIGEO GRIGIŠKĖS AB
Grigiškés, HB / Pa / Ti
www.grigeo.lt

### GRIGEO KLAIPĖDOS KARTONAS AB
Klaipeda, Pa
www.grigeo.lt

### PACK KLAIPEDA
Klaipėda, MP
www.pack-klaipeda.lt

## POLAND

### ABEK SP. Z O.O.
Drawsko Pomor-skie, Ti
www.abek.pl

### APIS SP. Z O.O.
Szczecin, Pa
http://pwapis.eu/en/

### ARCTIC PAPER KOSTRZYN S.A.
Kostrzyn Odrzański, Fi / P&W
www.arcticpaper.com

### BEMA FABRYKA PLYT FILTRACYJNYCH I TEKTURY
Wleń, Bo / Hand / Pa / Sp
www.bema.pl

### FABRYKA PAPIERU I TEKTURY BESKIDY S.A.
Wadowice, Pa / Ti
http://en.paper.com.pl

### FABRYKA PAPIERU W DABROWICY SP. Z O.O.
Jelenia Góra, Pa / Re
www.fabryka-papieru.pl

### FABRYKA TEKTURY W JALOWCU SP. Z O.O.
Lubań, HB
http://tekturalita.pl

### FIBREPAK
Poznan, MP
www.fibrepak.eu

### FIRMA W. LEWANDOWSKI PHU
Włocławek, Hy / Ti
www.lewandowski.com.pl

### GLUCHOLASKIE ZAKLADY PAPIERNICZE SP. Z O.O.
Głuchołazy, Hy / Ti
www.gzp.com.pl

### HANKE TISSUE SP. Z O.O.
Kostrzyn Odrzański, Ti
www.hanketissue.pl

### HOMANIT GMBH & CO. KG.
Karlino, MDF
www.homanit.org

### HOMANIT GMBH & CO. KG.
Krosno Odrzańskie, MDF
www.homanit.org

### ICT POLAND SP. Z O.O.
Kostrzyn Odrzański, Hy / Ti
www.ictpoland.pl

### INPOL-PAPIER LTD
Bardo, Pa
www.inpolpapier.pl

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www.peharttec.ro

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### GORICANE TOVARNA PAPIRJA MEDVODE D.D.
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www.mm-karton.com

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www.hamburger-containerboard.com

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www.lilakagit.com

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www.marmarakagit.com

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www.osnova.ua

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http://kpf-paper.all.biz/en

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www.kmm.ua

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www.slav-oboi.com.ua

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Zhytomyr, MP / Pa
http://en.cardboard.com.ua

| PRODUCT KEY | | |
|---|---|---|
| PANEL | HB (Hardboard) | MDF (Medium Density Fibreboard) |
| | Ins (Insulation) | |
| | PB (Particle Board) | OSB (Oriented Strand Board) |
| PAPER | Bo (Board) | Pa (Packaging) |
| | CB (Core Board) | P&W (Printing & writings) |
| | Co (Coated) | Re (Recycled – various) |
| | De (Décor) | Sa (Sack) |
| | Fi (Fine) | Se (Security) |
| | Hand (Handmade) | Sp (Speciality) |
| | Kr (Kraft) | Th (Thin Papers) |
| | La (Label) | Ti (Tissue) |
| | MG (Machine Glazed) | Wa (Wallpaper) |
| | Ne (Newsprint) | |
| PULP | Pu (fibre) | |
| OTHER | Hy (Hygiene) | NW (Nonwoven) |
| | MP (Moulded Pulp) | |

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## Individual Membership Benefits include:

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  - ***Paper Technology International*** - a prestigious international technical journal (3 issues pa);
  - ***PITA Annual Review*** - an invaluable source of contact information and data;
  - ***PITA Membership Directory*** - a unique source of contact details (exclusive to members);
  - ***PAPERmaking!*** - a new e-magazine with business/technical focus (2 issues pa);
  - ***PITA Affairs*** e-newsletter - containing time-sensitive information (at least 10 issues pa).
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- Advantageous arrangements for all Training Seminars organised by **PITA**.

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  - Promotion and links from the **PITA** Website, via emails and in our directories;
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* *Students must be under the age of 30 and participating in a recognised training programme relevant to the Paper and / or Fibrous Forest Products Sectors.*