PITA ANNUAL REVIEW

2010-2011

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

Annual Review & Membership Directory*

2010-2011

Compiled by the PITA Office

PITA
Paper Industry Technical Association

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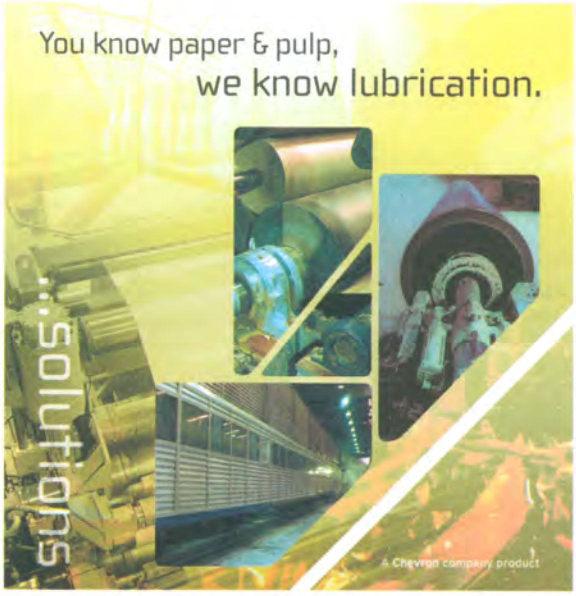
Published by PITA

Origination by PH&TM Ltd, Manchester
Printed by Pensord Press, Gwent



Front cover picture
Chevron Global Lubricants is a division of Chevron Limited, an indirect wholly owned subsidiary of Chevron Corporation, which produces and markets products under the Texaco, Havoline and Ursa brands for daily use in cars, trucks, buses and industrial machinery around the world. It is the world's fourth largest supplier of finished lubricants and a leading manufacturer of the premium base oils that represent the foundation for the company's major products.

*Only PITA Members receive this product in full, incorporating the Membership Directory

Paper Industry Technical Association

Annual Review & Membership Directory

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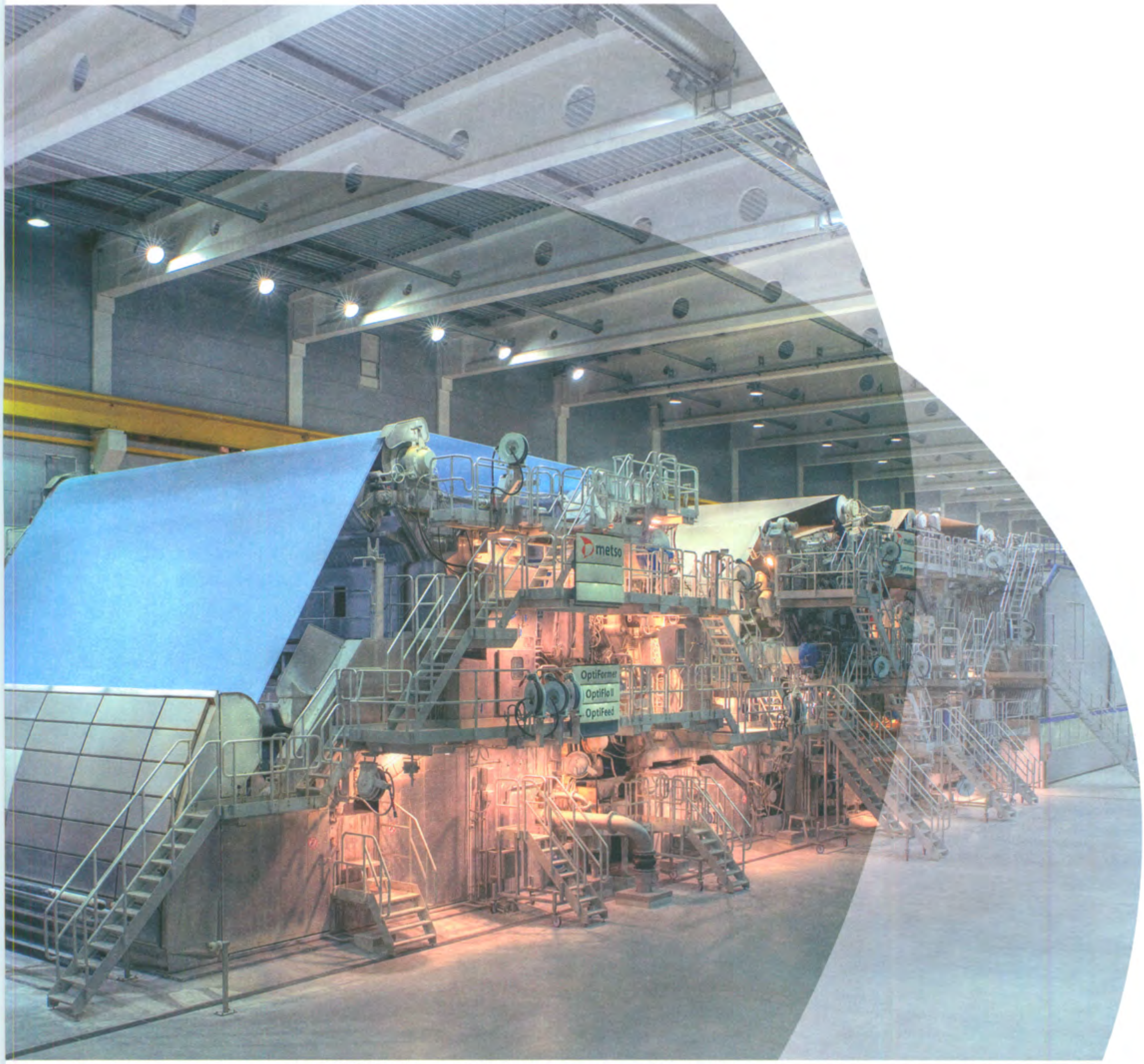
NB Two versions of this product have been produced with the individual membership list only appearing in those copies distributed to PITA members, thus complying with data protection legislation.



Chairman's Message

It is both a great honour and privilege to have been elected Chairman of PITA and I would like to thank Kieran Rafferty for his steady chairmanship over the last couple of rather choppy years.

I am excited by the challenges that still face us over the coming years, both as an association and as an industry, and believe that many of the threats facing the industry will be overcome with the application of technology and this is of course, where PITA comes to the fore.

PITA is a remarkable association, a collection of some of the finest and most creative technical minds in the industry, anywhere in the world, and these minds are at the disposal of the membership. The only way that you can benefit from what the combined strength of the PITA membership has to offer is by taking an active part in it. This means supporting the working groups, attending the PITA meetings and participating in the conferences, training sessions and discussions that PITA arranges on your behalf.

As an industry association, we are well aware of the difficulties that many members face in finding both the time and the money to attend the meetings that PITA plans. However, we need your input and ideas so that the content of what is covered in our meetings is both relevant and interesting and at locations that are convenient. Mill visits are usually well attended, so if you are able and willing to host a meeting or if you have any other ideas, then please contact either Helen or Barry at the PITA office, both of whom work tirelessly to make sure that the events the association stage are successful.

For the association to thrive we need to increase our membership reach. This is likely to be brought about through closer working relationships with overseas associations and by broadening the appeal of PITA to a wider industrial base. The industries that we will approach will be relevant to the existing membership and will all be united by the practice of adding value to cellulose fibre in its many guises.

The next few years are not going to be particularly easy, but I sense that with the continued determination of my fellow board directors combined with the commitment of the PITA membership, the association will continue to deliver timely and relevant information to the industry, through its friendly and convivial meetings.

Tim Klemz

PITA Board

2010-2011	
Tim Klemz	*National Chairman*
Martin Wroe	*Deputy National Chairman*
Kieran Rafferty	*Immediate Past Chairman*
David Dredge	*Publications Director*
Stephen Hutt	*Financial Director*
Helen Dolan	*Company Secretary*
Graham Moore	
Charles Whitaker	

2009-2010	
Kieran Rafferty	*National Chairman*
John Brazier	*Deputy Chairman*
David Dredge	*Immediate Past Chairman and Publications Director*
Barry Read	*Technology Director*
Helen Dolan	*Company Secretary*
Carl Cole	
Tim Klemz	
Graham Moore	
Charles Whitaker	
Martin Wroe	

2008-2009	
Kieran Rafferty	*Chairman*
John Brazier	*Deputy Chairman*
David Dredge	*Immediate Past Chairman and Publications Director*
Alyson Wiltshire	*Finance Director*
Carl Cole	
Tim Klemz	
Graham Moore	
Barry Read	*Technology Director*
Clive Ward	
Charles Whitaker	
Martin Wroe	

PITA Office

Barry Read
Chief Executive

Helen Dolan
Company Secretary

Immediate Past Chairman's Message


Kieran Rafferty

As I come to the end of my tenure as Chairman I reflect on an exciting time in the UK paper industry. It is with regret that I note some of our older established mills suffering in the current economical situation; however, we have seen substantial investment in the UK with Palm Paper's new mill in Kings Lynn and the proposed investment in Manchester from SAICA.

Our Association is also evolving. We have taken major steps to marry income with expenditure. We have introduced a new form of communication with the e-mail newsletter. The office has worked hard on offering a series of seminars and training courses. We are also extending the hand of co-operation across the Channel and across the Atlantic which reflects the global market we are in.

We are planning more events and opportunities for training in 2011. At this point I must stress without the hard work of the administrative team the Association could not provide any of the services they do. I would like to thank Barry and Helen for their commitment and innovation. It has been an honour to work with them, and the team of Board Directors. The Directors are volunteers, as are the members of the Working and District Committees. They give their time and effort for free and I thank them and their supportive companies.

In this time of economic uncertainty I understand the difficulty members face in attending seminars and meetings. Feedback is important to us and if there is any event you may think would be interesting then please make your suggestion through the office. The Association will thrive with active membership in all areas.

I would like to take this opportunity, on behalf of a grateful Association, to thank Margaret Marley for her diligent and professional editorship of *Paper Technology*. She has been the editor for over 20 years and it is testament to her Stewardship that the magazine is held in such high esteem worldwide. I wish Daven Chamberlain success in taking on the role of Editor.

Finally I would like to wish the next Chairman every success. The Industry and the Association is facing a tough time in light of the reduction of the number of operatives and manufacturing plants in the UK. There are great opportunities in creating partnerships with sister industries in printing and packaging and with our friends abroad. I hope you, the membership, support the Association. With your commitment the Association will flourish.

Kieran Rafferty

Review of the year

A number of contributions have been sought from various people within the paper industry to supply a comment on a particular subject and a review of that subject during the year. They are detailed below:

Paper Recovery and Recycling

by Peter Seggie (CPI)

cpi confederation of paper industries

2010: UK paper & board use and recovery stabilises

Based on data from the Confederation of Paper Industries (CPI) and HM Revenue and Customs (HMRC), 2010 is likely to be a year of stabilisation for the paper industry with UK paper & board consumption and UK recovery levels similar to those of 2009. This will be a welcome outcome given the turbulence of 2008 and the contraction in paper & board use through 2009, and is a reflection of the general economic conditions prevailing in the UK through 2010.

It is likely that 2010 will end up with a little less paper & board collected for recycling in comparison to 2009 but with slightly more paper & board products being consumed, meaning the overall recycling rate is likely to see a slight drop to around 65% from 67% in 2009. This slight drop in the recycling rate is however likely to be associated with a lag factor of the paper & board recycling industry where (higher) levels of recovery take a few months to reflect increasing consumption.

At the time of writing, it is anticipated that UK collection of used recovered paper & board for recycling in 2010 will come in at around 8 million tonnes, about 150,000 tonnes less than that recorded in 2009 *(Figure 1)*; while paper & board consumption in the UK is likely to rise by about 2% to 12.3 million tonnes. As we go forward, paper & board recovery and recycling levels are likely to climb, reflecting higher consumption levels.

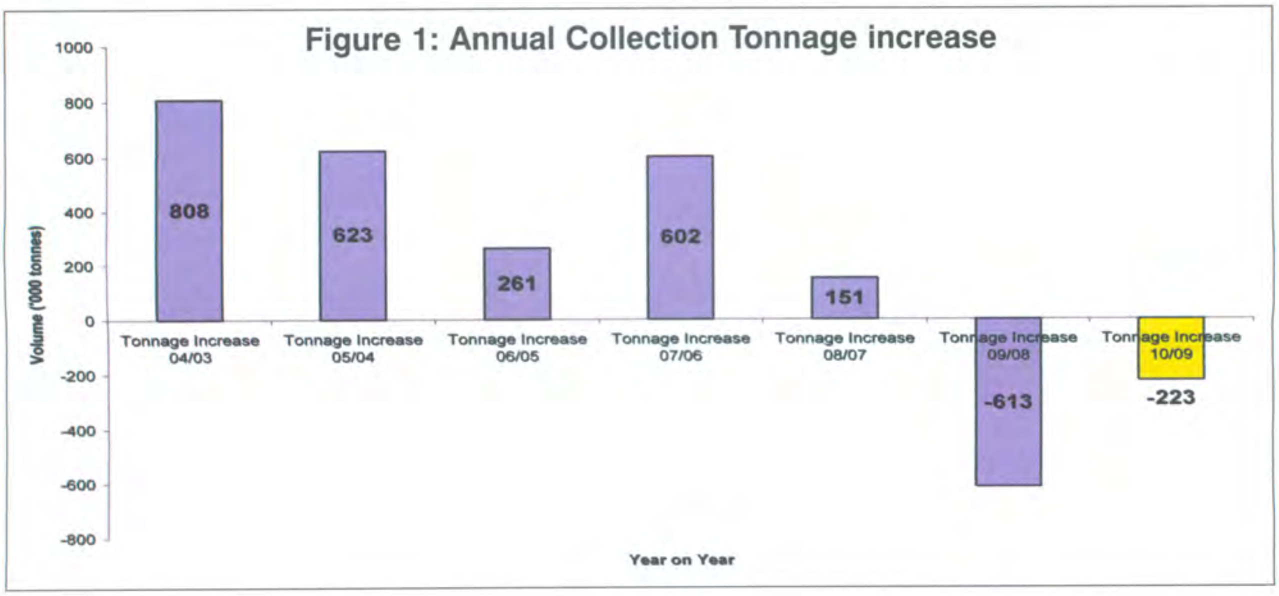
Export dependence continues but dynamics change

Through 2010 the UK continued to rely heavily on export markets, particularly the Far East, for paper & board recycling, but the dynamics changed slightly as UK domestic and European demand rose, reducing exports to the Far East. 2010 is still likely to see well over 50% of used paper & board collected in the UK sent overseas for recycling with 76% of exports sent to the Far East, including 60% to China alone *(Figure 2 overleaf)*. This though is significantly down on the 2009 numbers which saw 85% of exports go to the Far East, including 62% to China. This change is a result of increased European demand for UK recovered paper & board with Europe increasing its imports from 14% in 2009 to a likely 24% for 2010. Dependence on export markets will continue to be a key feature of the UK paper & board recycling industry as growth in the UK domestic reprocessing capacity will be very slow.

Going forward

The 2010 figures continue to show that export markets remain absolutely key to the future of recovered paper & board collection in the UK, even during times of economic turbulence. Development of overseas markets must continue if further waste paper & board is to be driven out of the UK waste stream in line with EU and UK waste legislation. New legislation in this area is most likely to be driven by the completed transposition of the revised EU Waste Framework Directive into national laws and national waste strategies for each of the UK administrations. England, under the new coalition government, is reviewing all waste policies and this may change the dynamics of waste management going forward. Changes to the UK Packaging Regulations will also have a future impact but, with recycling targets for the next 2 years held at 2010 levels, there will be little short term impact. The critical element in all future legislation will be to ensure that, not only all new material driven out of the UK waste stream is of a quality to remain competitive in the global recovered paper markets, but that increased recovery does not negatively impact on the quality of material currently extracted.

Subdued levels of paper & board consumption in Western economies have reduced the availability and supply of recov-



ered paper & board to the Far East *(Figure 3)* but continued strong demand from these markets has led to higher prices for material in the global market. Without increased recovery levels in Western as well as Far Eastern domestic economies, prices can be expected to remain high. However, demand for paper & board products, and thus recovered paper & board as a raw material, is still very dependent on global economic activity; it is difficult to gauge exactly where this is heading and this could lead to significant price volatility. The European share of the Chinese recovered paper & board market, excluding the UK, fell through 2010 to 18% from 23%, while the UK share actually rose from 10% to 11%. This indicates that the UK has well established trading relationships with China which may stand us in good stead going forward. To continue its success in export markets, particularly Far East markets, the UK must ensure it remains competitive on the key buying criteria of quality and price. This can only be achieved by reducing the complexity of UK waste polices for collection, sorting and exporting whilst maintaining a need to ensure the integrity of the material for effective and efficient recycling; wherever in the world this takes place. On behalf of the UK paper & board recycling industry, CPI will continue to send this message to all UK administrations.

Opportunities

The UK transposition of the revised EU Waste Framework Directive provided a real opportunity through 2010 to develop waste management along the lines of product supply chains with quality at its heart. CPI was heavily involved in this process and we await the final outcome in December 2010. If effectively transposed and enforced by the UK governments, CPI believes we can all look to a future "recycling society" where everyone realises the value of secondary raw materials and everyone benefits from the subsequent economic, environmental and social opportunities. Through the current EU "end of waste" project being undertaken by the European Commission, 2012 may be the year when recovered paper & board is finally accepted as a product rather than a waste. CPI will continue to engage in this process to ensure proposed criteria for waste declassification is in line with industry practice and is achievable for the majority of high quality material.

Note: *This article is based on 2010 data from January to September annualised to give an estimate for the full year. This may mean there is a variance to final 2010 data released by CPI in 2011.*

Figure 2: UK Recovered Paper Markets by Tonnage

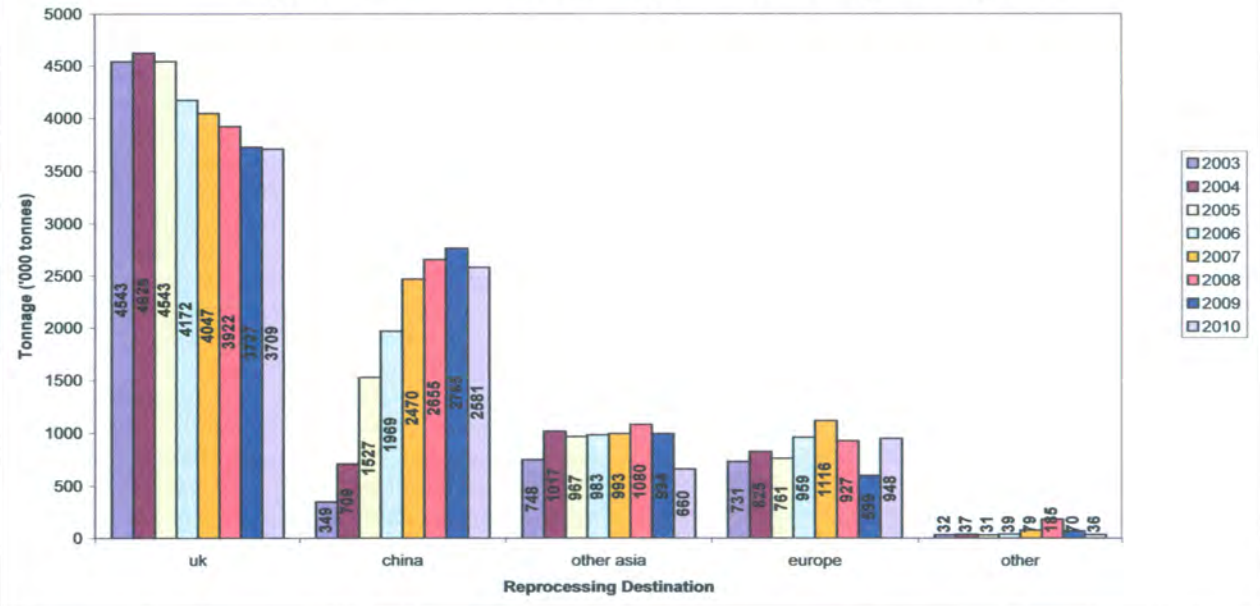
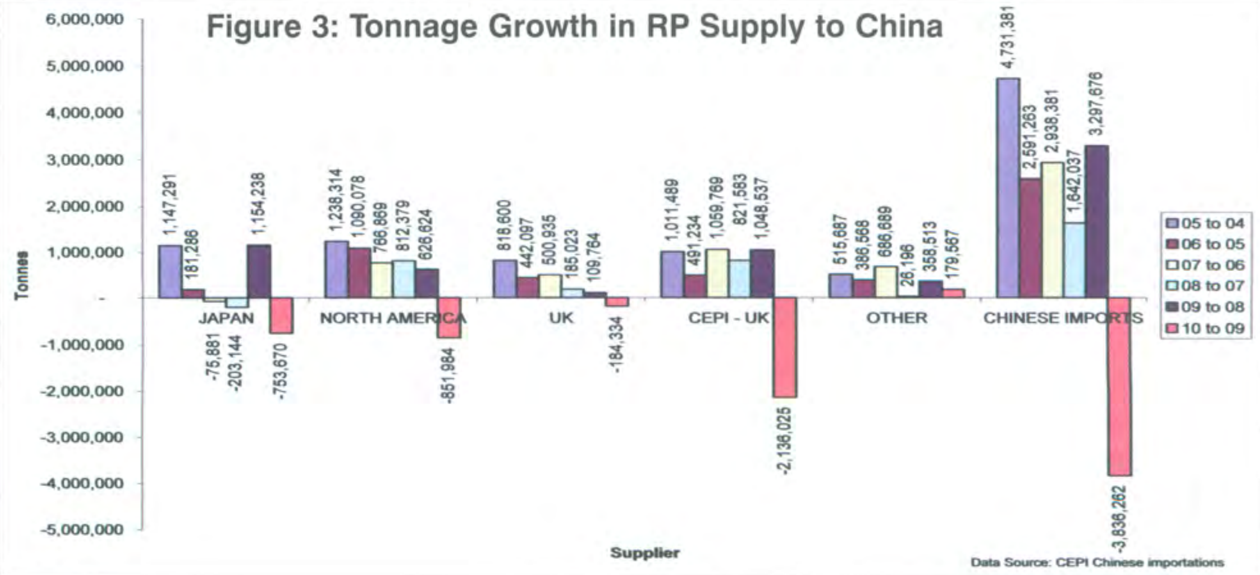


Figure 3: Tonnage Growth in RP Supply to China



Carton: Ticking all the Boxes

by Bob Houghton
Corporate Marketing and Communications Manager of Chesapeake Ltd

Chesapeake®

Packaging has many functions to perform but brand owners and product manufactures increasingly see packaging as a form of advertising. Some 75% of all purchase decisions are made by consumers in front of the shelf. This means that if a packaging format is attractive, easy to recognise and stands out on the shelf, it will have an advantage.

Cartons meet these requirements head-on and offer huge opportunities for brand differentiation in terms of shape, finishes, print qualities, opening and closing devices and security features. Another growing requirement for packaging is sustainability – cartonboard, the raw material for cartons, also admirably rises to this challenge. Cartons are made from a constantly renewable raw material, wood, which means they are renewable, recyclable, biodegradable, compostable and can even be used to produce energy. At the end of the day, more trees are planted each year than are felled making this a truly sustainable material. Sustainability is clearly important to consumers too which will see them capture an even greater share of the packaging selected for branded products in the retail trade.

During the last few years, there have been a number of exciting new developments, which have demonstrated the versatility of this form of packaging. Over this period, there has been a general move to retro styles reflecting a wave of nostalgia that has seen a surge in demand for mid-20th-century style homewares, vintage clothing and books. It seems 'quality' is associated with things of the past so as well as colour and design for packaging, textures have also been important. This has seen cartons incorporate print finishes & effects that include techniques that provide tactile qualities such as 'soft-touch' varnishes or inline reticulation processes that add prominent varnish lines. 'Natural' aesthetics which have been 'on trend' for a while have also been serviced well by the clever use of print finishes. 3D qualities are important and constructional designs and effects that provide depth and the impression of movement are also in demand. Chesapeake's 'Glint', a printed holographic effect, which was initially applied to labels *(Figure 1)* will soon enhance cartons as well. Optical enhancements

Figure 1: Chesapeake's 'Glint', a printed holographic effect, which was initially applied to labels

Figure 2: Chesapeake's Impressions™ - this unique paperboard concept provides a truly 3D quality

to cartons can also be incorporated using clever fitments that hold/suspend products.

Chesapeake's Impressions™ is a case in point *(Figure 2)* - this unique paperboard concept provides a truly 3D quality to any pack. Impressions™ is formed by using a specialist low energy process which makes it possible to form a paperboard material into a complete range of distinctive shapes. This exciting development can help to promote and complement a brand – from tactile bubbles on a tube to replicating the distinctive shape of a bottle or jar. Impressions™ also has the flexibility to be formed into a pod to hold a liquid or paste, offering a more environmentally responsible alternative to plastic packaging. Carol Hammond, Head of R&D at Chesapeake, said, "At last there is a paper-based material that gives an answer to forming 3D shaped packaging for cartonboard. We believe Impressions™ offers brand owners and manufacturers a wide range of marketing opportunities to differentiate their brands. It provides a tactile quality that is so positive you feel compelled to touch the pack."

The environmental qualities of a carton are, however, its major advantage. Folding cartons enjoy an unrivalled carbon footprint – no other packaging material can match. Over the last few years, major brand owners have moved more of their products into this natural and sustainable resource. Environmental consideration has been particularly important at the commodity end of the packaging market; many packs have been redesigned to remove mixed materials such as plastic fitments & trays to make recycling easier. Another unique feature that cartons offer is to completely biodegrade within an anaerobic digester (AD) or IV composting unit. New biopolymers have been developed that can be laminated to, or coated on, board to provide grease and moisture barriers so enabling cartons to be used for many direct food applications. These could include ready meals or 'food on the move' where the potential to dispose of the soiled carton packaging, along with any waste food, into a kitchen caddy for AD recovery, may become a key benefit.

Cadbury's has just introduced 1 kg boxes for its *Heroes* brand which was previously exclusively packed in a tinplate container *(Figure 3, overleaf)*. The cartons have a board laminated lid to provide both strength and reinforce the pack's gift appeal. The carton was developed as part of Cadbury's 'Purple goes Green' initiative and reduces the weight of the pack by 45% - and the pack is also now fully recyclable. The new packs are delivered glued and flat which allows more cartons to be packed onto a pallet. This

Figure 3: Heroes branded carton

has reduced transport costs and provides the environmental benefit of fewer journeys.

Security features can easily be added such as tamper evident closures and designs to make cartons child-proof. European legislation has recently dictated the application of product information in the form of Braille for an increasing range of healthcare products. Cartons provide the ideal substrate for Braille embossing – dots can be precisely placed at speed on any or all of the carton's faces improving patient security.

Cartons clearly meet the full range of requirements of brand owners, retailers and consumers. They are made from a truly sustainable raw material that can be recovered and recycled; they can be embellished with high quality print and enhanced with interesting finishes and effects. They are easy to recognise on the shelf; easy to open and close and are well liked by consumers. The manufacturers of cartons and cartonboard are well established and well invested and are constantly looking for ways to increase their facilities to ensure they can always be at the forefront of innovation and development.

Jon Clark, Chairman of BPIF Cartons' Promotion & Marketing Group, sums up, "Cartons offer appealing environmental attributes: inherently renewable and highly recyclable; their sustainability credentials are readily understood by consumer, brand owners and multiple retailers."

Newsprint
by Otto Leskijärvi
Pöyry Management Consulting

A Breathing Break

After the dramatic demand decline in the European newsprint market in 2008 and 2009, the year 2010 has brought some relief to the producers, as the demand drop has levelled out into a stable development or slight growth. In China the newsprint demand never really experienced any drop in 2008/2009, as did not the Chinese economy, for that matter. Instead the newsprint demand in China kept growing and has now reached the demand level in North America, where the consumption has continued to contract through 2010 *(Figure 1)*.

In Western Europe, the newsprint demand bounce back has been extremely lacklustre compared to other publishing papers, especially compared to coated grades. On the other hand, super calendered (SC) demand development has been even more disappointing than that of newsprint. The SC situation is largely explained by tonnages gained due to downgrading at printers and publishers in 2008/2009, now moving back to coated grades. Hence, the overall end use demand in SC/LWC sector has been much more robust than in newsprint sector. Basically, the uninspiring newsprint demand development this year conveys the message that newspaper as a medium has not really been able to gain back the advertising revenue lost in the turmoil. In North America, the upturn in the economy has only been able to slow down the downward spiral of the market.

Changing Playing Field

The inability of newspapers to gain from the overall recovery in advertising expenditure sends a strong message of structural change in the demand for printed newspapers. Of course, this is a change which had already started years ago, especially in North America, but the downturn has clearly speeded up the process, causing a number of newspapers to withdraw from the market, meaning paper tons lost that will never return: in the United States over 150 newspapers have closed down or stopped publishing print editions since 2008. In Europe the development has not been as drastic, but examples may be found e.g. the publishing of free newspapers *London Lite* in the UK and *Global Noticias* in Portugal has been stopped.

The long and tedious battle of newspaper publishers to seek for working business models in the digital age, to replace the old ones corrupted by Internet and free and instant news-feed, may see some light at the end of the tunnel. Several publishers, especially the News Corporation, have already for some time been speaking about the need to shift to the paid-for on-line content. News Corporation's *Wall Street Journal* has been quite a successful example of content that is partly free and partly paid for. On the other hand, the same company's *The Times* and *The Sunday Times* total paywall solution has turned away a significant amount of net traffic and also advertisers from the sites.

The paid-for content as such has been a difficult approach to implement, until comes the iPad. The year 2010 marks the entrance of the potential game changer for the publishing industry, in the form of tablet computers. iPad along with some other tablet computers in the market, has enjoyed huge media hype during the year, and many are the publishers who are feverishly seeking for opportunities to publish their content in these media devices. It is also not only the current publications that are being offered in tablets, but there are publications designed specifically for these platforms. The exact magnitude of the impact of the tablet computers on printed newspaper is still quite difficult to say, but the direction of the impact is clear. When the tablet computers evolve and become

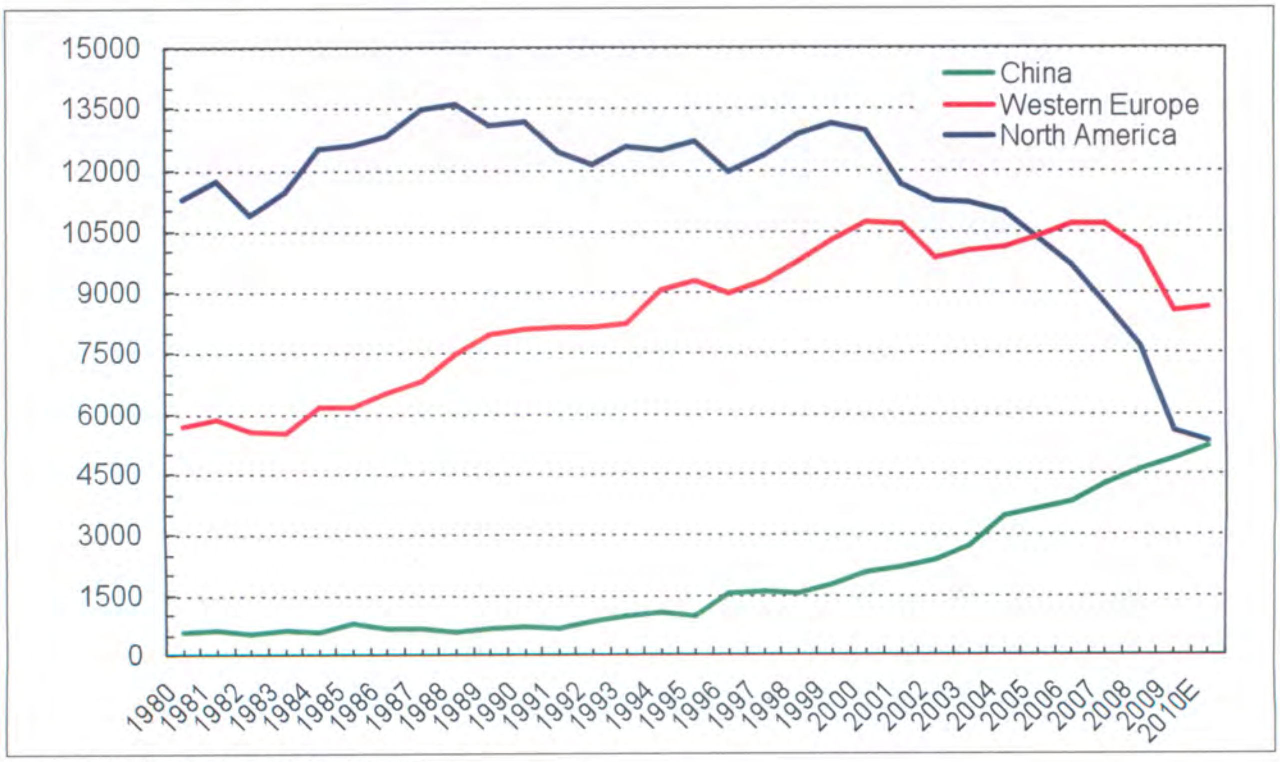


Figure 1: Newsprint demand development

cheaper, lighter and even bendable, the decreasing impact on newsprint consumption will be drastic. The move from broadsheet format to tabloid format will continue with a move to tablet format. All in all, we may conclude that this year's demand development is probably just a short break before the structural decline really kicks in for Europe.

Industry needs to adjust

The newsprint producers have had a terrible year in 2010, due to historically low price levels caused by overcapacity and resulting in a fierce price battle. This year several rumours have circulated in the market regarding possible consolidation in the industry. This is something that, together with capacity reductions, will be needed for the industry to have a chance of turning back to profit in the long run. From 2007 some 1.5 million tonnes of newsprint capacity has been taken away from the European market place *(Figure 2)*, but as we may see from the newsprint price levels in 2010, this was not enough to remove the overcapacity in the market. The main capacity reductions in 2010 include the shut down of Stora Enso's Varkaus PM4 and Maxau PM7, and the closure of the AbitibiBowater Ellesmore Port mill.

The on-going price negotiations for 2011 will be difficult, while interesting. In addition to pushing significant price increases, the newsprint producers are looking for shorter contracts, something that publishers are keen to resist. We may expect some success in raising prices, due to some-

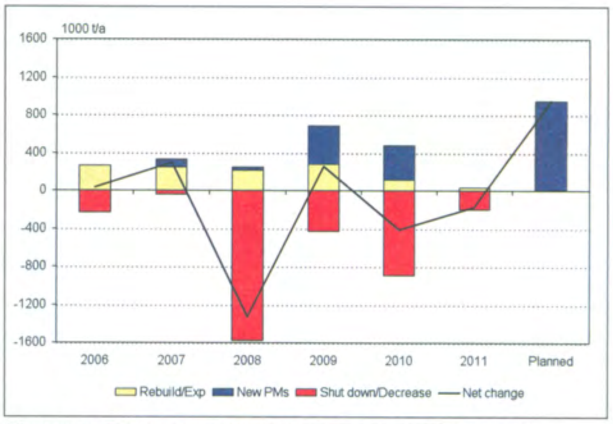


Figure 2: European Newsprint Capacity Development

what improved supply/demand balance, supported by increased exports, weakening of the Euro and a high increase in the price of recovered fibre. What comes of decreasing the contract lengths remains to be seen.

Otto Leskijärvi is working as Senior Consultant in Pöyry Management Consulting. He has over ten years of experience within market and corporate strategies in the pulp & paper industry. He holds an MSc in forest economics and marketing from Helsinki University.

EU Forestry
by Bernard de Galembert
Forest and Research Director of CEPI

The European Union seems to be discovering that 40% of its territory is covered with an ecosystem – forests - that might prove to provide many solutions to the challenges that it is facing. Is it time to be expressing our wishes for 2011? 2010 and 2011 is and will be seen as an opportunity of renewed interest from the European Institutions *vis-à-vis* forests, forestry and the related industries. As forests of Europe are and will be fulfilling multiple roles and functions, this interest by the policy makers has been rather diverse, albeit more often than not taking on the form of "non-forest policies impacting on forests".

Three highlights of 2010

2010 has seen the approval of the Regulation laying down the obligations of operators placing timber and timber products on the EU market. In other words, the EU policy to curb down illegal logging by prohibiting the import of wood and products made of wood from illegal sources. Whilst we must wait until 2013 to see the Regulation enforced, the objective of forbidding illegal logging is to be praised, provided it does not create burdensome administrative procedures. The legislation may have gained further popularity should it not be leaving the door wide open to products printed in China, which will not have to comply with the new policy.

At the same time, policy makers' awareness is growing about achieving the target of 20% renewable energy by 2020 might be facing significant biomass shortfalls and destroy the competitiveness of the European biomass-based industries. A recently released study by DG Energy acknowledges the risk of a deficit of 240 million cubic metres of wood by 2030 – a warning already heeded by the European paper industry in 2007 (McKinsey Graph). At the same time, the European Commission failed to adopt strict and binding sustainability criteria for biomass, further discriminating between raw material usage and energy usage of agricultural and forest resources.

Finally, by initiating a think tank on the protection of forests against climate change, the Commission also created the opportunity to discuss more widely the possible merits of European holistic, coordinated and consistent policy approach on forests.

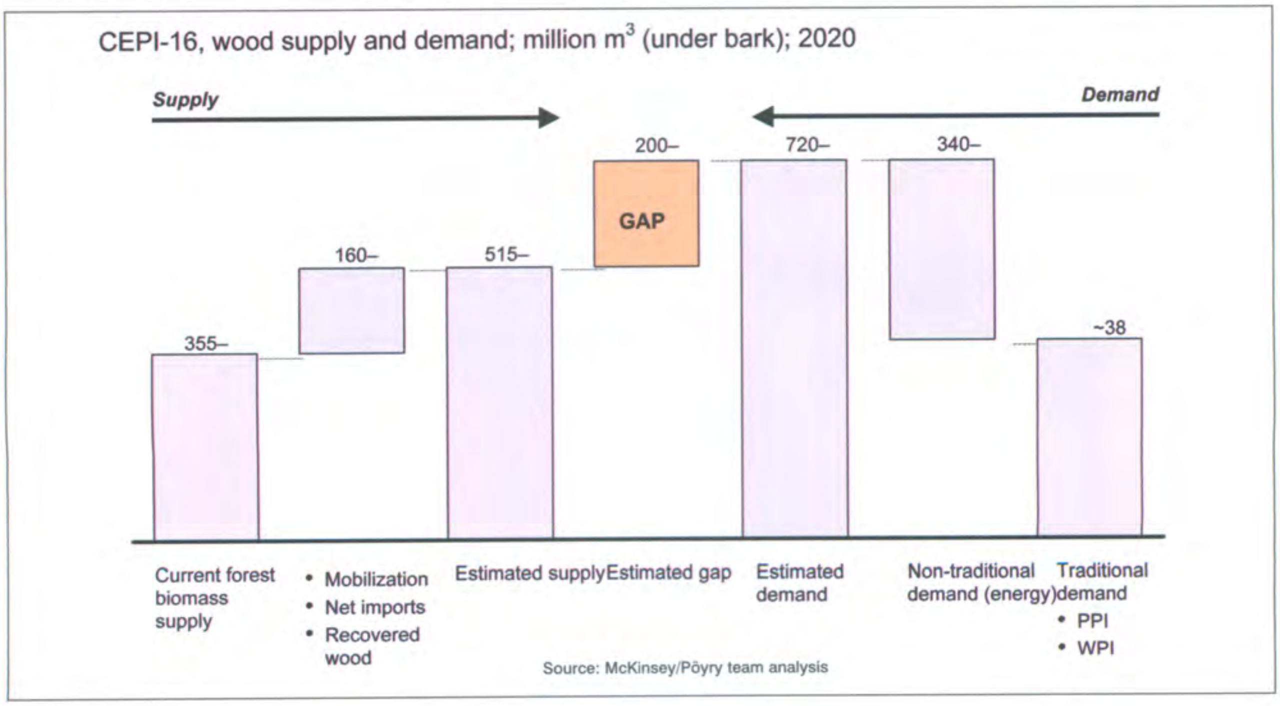
Wishes for 2011

Many opportunities to further raise the profile and visibility of forests and forestry at European level will exist in 2011. The debate will continue on the protection of forests in Europe and the related exploration of options to bring more consistency and coordination. It will take place in parallel with the Forest Europe process (formerly the Ministerial Conference on Protection of Forests in Europe) in which Ministers in charge of forests in the Pan-European region will be invited to kick-off the negotiations towards a Pan-European legally-binding Convention on Forests.

Hopefully, the Cancun Conference of the Parties to the United Nations Framework Convention on Climate Change will, by then, have formally recognised the positive contribution of forests and forest products to climate change mitigation. The trapping or 'sequestration' of carbon in trees and its further storage in wood products will then be one of the means available to reduce the amount of greenhouse gases in the atmosphere.

Also in 2011, the Commission will have analysed the Member States' strategies to achieve the objective of 20% renewable energy by 2020. We will then be better equipped to know what practical solutions should be put in place to avoid competition distortions with the industry, whilst mobilising the needed resources to fulfil the targets. Moreover, one can expect the adoption of binding sustainability criteria for biomass before the end of next year.

After years of fragmented policy approaches on forests, 2011 might just see the first signs of harmony and dialogue. After all, forests cover 40% of Europe's surface and the related industries contribute to 8% of the EU manufacturing sector GDP.



Hawkins Wright / British Wood Pulp Association Symposium 2010

by Daven Chamberlain
Editor, *Paper Technology*

Its November, we're in London, so it must be the annual HW/BWPA symposium. This year's affair was larger, with more speakers than ever, but still covered the usual round of topics: economics; regional and grade focus; and forecasting, to which a welcome additional topic was added this year: shipping used for pulp transportation. The facilities of Savoy Place, sumptuous home of the Institution of Engineering and Technology, were as welcoming as ever, and the atmosphere, despite the rather early start, was convivial, helped immeasurably by the excellent catering. The essence of the presentations is distilled below:

Andrea Boltho – Oxford University

Andrea Boltho is a Fellow and Tutor at Magdalen College. His college profile notes he specialises in 'applied macroeconomic and policy problems of the OECD economies; the economies of Italy and Japan; and economic history.' It fails to note that, in addition to his academic specialism, he is also a highly entertaining speaker.

The thrust of this talk was a comparison between the financial crash of the 1930s, and the current recession, and how governments have coped differently this time around. The focus was on the global economic crisis, rather than on the pulp and paper market, and as such a detailed summary of his talk is beyond this review. It is sufficient to concentrate solely upon three predictions he made: (1) we will not experience a double-dip recession; (2) global growth should continue through to 2013 *(Figure 1)*; and (3) the Eurozone will survive, albeit with some technical restructuring.

With regards to prediction 2, I have added the forecasts Andrea made at the 2008 Symposium for the years 2009 and 2010. In most cases it will be seen his were under-estimates, but he almost always predicted correctly whether growth or contraction would occur. Hence we can only hope the growth predictions made for the coming few years also turn out to be under-estimates!

Kirsten Lange – Boston Consulting Group

Apologies for appropriating an over-used football metaphor, but Kirsten's slot was very much a presentation of two halves. It was entitled 'Will Pulp, Paper and Profit Ever Go Hand in Hand Again?', and the first half focussed squarely on this subject as it relates to the whole of our industry. Then, for the second half, we were taken into the realm of e-devices, and how they will affect our industry, although by default here she was addressing herself solely to P&W manufacturers.

The crux of the first half was that pulp and paper has underperformed as a sector for at least the last 5 years; pulp, however, has done very slightly better than paper. The increase in European productivity of the last five quarters (of 2.8Mt) has still not offset the downturn of 2008 (of 4.8Mt), so we still have some way to go just to regain the output of just two years ago.

A more detailed look at performance shows hygiene and packaging are out-performing graphic papers, and that 'bigger' does not equate with 'better' – consolidation does not appear to resulting in better profitability *(Figure 2)*.

Kirsten then highlighted a major obstacle that prevents the industry from achieving what other industries appear capable - its almost complete inability to forecast. Obviously there are exceptions; tissue and packaging tend to correlate well with GDP, but others, most notably P&W grades, do not. Fluctuating demand for these latter grades is predicted to be hit by the incursion of e-devices – which led nicely on to part two of her talk.

The growth of "Boys' Toys", such as the Kindle and iPad, is predicted to have a major impact on various traditional printed media. Studies already show European, North American and Asian consumers have a high degree of knowledge about these devices; planned purchases are also significant, although the entry price still represents a barrier at present. As they penetrate the market, content is likely to be adapted to maximise the capabilities of the different platforms, the effect of which is predicted to hit many parts of the print market. (In the medium term the estimated impact of e-devices ranges from 80% for Newspapers, to 20% for Directories and Catalogues.)

The phenomenal growth of these devices is the cause of these dire predictions. However, it is important to remember this growth is starting from a rather low user base. As with the prediction that Digital Printing will rule the world, at the expense of traditional technologies, the truth, at least in the short-medium term, is likely to be less dramatic.

Finally, Lange focussed upon what makes companies profitable. Fifty years ago 40% of the market leaders tended also to be the most profitable in their sector; by the nineties this had declined to the current value of around 5% - 'Big' is no longer 'Beautiful'. In the old order, success was obtained by concentrating upon: Scale; Efficiency; and Strategic Planning. She argued that a new strategy was

	Forecasts from 2008		Present Estimates (GDP percentage changes)				
	2009	2010	2009	2010	2011	2012	2013
United States	-1.5	0.5	-2.6	2.6	2.5	3.5	3.6
Eurozone	-1.2	0.5	-4.0	1.5	1.3	1.7	2.0
Japan	-1.5	-0.7	-5.2	2.6	1.1	2.1	2.0
UK	-1.5	0.0	-5.0	1.6	9.0	9.2	8.8
China	5.0	5.5	9.1	9.7	2.0	2.7	3.2
World	0.2	1.5	-2.0	3.6	3.3	4.0	4.2

Figure 1: Short-term prospects for world trade (GDP; percentage changes)

required for the current volatile business climate – an Adaptive Strategy – based upon the 4Rs: Readiness; Resilience; Responsiveness; and Recursion. The ability to understand demand drivers; redeploy resources to meet new needs; respond; and learn over time, will all be necessary for the industry to adapt and survive.
Overall this is a potentially useful model of commerce; however, for it to succeed, the first step (Readiness) relies upon accurate forecasting – which has already been highlighted as inadequate. Only time will tell whether the industry will start to master the art of divination.

Henrik Gistren – Fibria
Henrik Gistren closed the first half by giving the first of two presentations on Pulp – specifically BEKP – and South America. Short fibre forest is located mainly in Latin America (110Bm³), Africa (57Bm³) and South East Asia (26Bm³); a distribution that shows why most new planned projects tend to centre around South America *(Figure 3)*.
Productivity of fast-growing eucalyptus species has increased from around 6.4t/ha/year (1970s) to 11.3t/ha/year (today). In the next decade this should increase further to around 13t/ha/year, but it could reach 17-20t/ha/year if GM was allowed.
The new pulp projects are all large scale state-of-the-art facilities, and the destination for pulp is worldwide, with around 48% going to Europe, and 31% to Asia – only 21% remains on the American continent, split almost equally between North and South. Current uses are P&W (26%), Specialities (21%) and Tissue (53%).

Figure 2: Average ROCE of various pulp and paper companies 2006-2010. (©Boston Consulting Group)

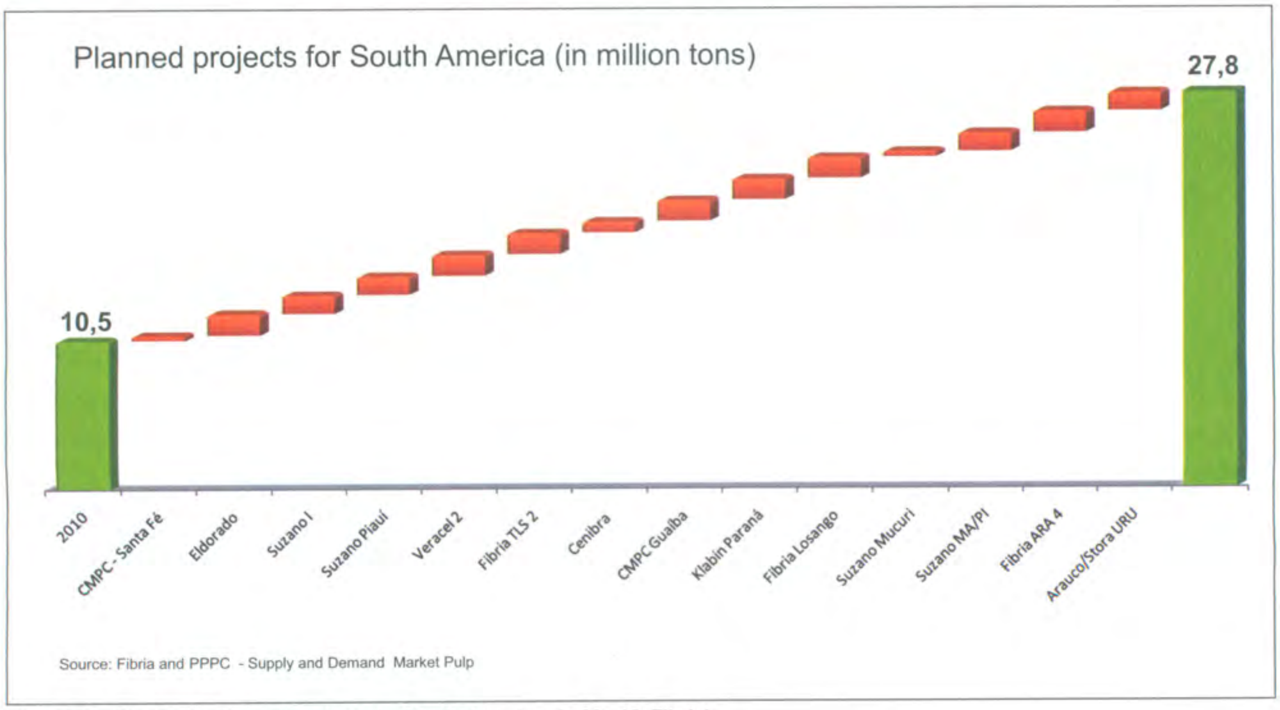


Figure 3: Planned pulp mill projects in South America, in Mt. (© Fibria)

Next year Fibria expect a significant increase in demand for BEKP. Demand growth of just over 3% for both P&W and Tissue is predicted, while world pulp demand is forecast to grow by 5%, caused in part by resurgence in Chinese demand. Finally, keeping on the subject of forecasting, Fibria predict around 8Mt of new market pulp capacity will be needed to supply demand by 2015.

Brian McDonald – Ilim Group

After the break - and the solemn silence to mark Armistice Day – the second Pulp talk commenced, focussing upon long fibre, and Russia. Russia is one of the world's enigmas: this vast country has the world's largest forest reserves *(Figure 4)*, and the world's lowest utilisation rate. But with a very competitive cost base, and with a border with China, Russia is positioning itself as a major player in the global pulp industry of the future, hence the title of Brian's presentation: 'Russia's pulp and paper potential'.

Traditionally Russia has been seen as a difficult market in which to operate. In an effort to change this, a new forest code was adopted in 2007, which reformed forest legislation. Autonomy was devolved to regional level, which has resulted in faster decision making. Currently, if a company performs its obligations concerning both harvesting and replanting, it can be confident of maintaining its concessions rather than having them granted to another party.

Traditionally most Russian mills have been in the West, and have been focused upon servicing Europe. Ilim is concentrating specifically on the East, in Siberia, with the stated aim of being the main softwood supplier to China *(Figure 5)*. (Currently China is the largest single market for Ilim, equating to around 40% of its product; by contrast the home market accounts for only 27%). The new Bratsk pulp mill in Siberia, which will be implemented in 2012-2013, is an example of this Eastern focus – it is only around 1500km from Beijing, but 5000km from Moscow.

Overall, Brian commented upon how the Russian government is striving to harvest the natural resources it controls, wood being one of many, and in doing so it is actively encouraging involvement of the private sector. Furthermore, it is giving investors confidence that their assets will be protected. As confidence in the government increases, so he predicts Russia will see increasing private investment, in an analogous way to China.

Einar Didriksen - Westfal-Larsen Shipping

We all know that pulp is a global market, and that it is seldom used where it is produced, yet how many of us consider the shipping of this commodity around the globe? Furthermore, what is the current state of the global freight fleet, and what implications does this have for pulp carriage in the future, especially considering the current investments in new pulp mills and the consequential increase in pulp traffic this will entail? The answers to these questions, from Einar Didriksen, were somewhat surprising, not to say disturbing.

First, you need to understand a new vocabulary, which relates to ship sizes: Capesize (> 100DWT); Panamax (around 65-90DWT); Supramax (50-60DWT); Handymax (40-50DWT); Handy (< 40DWT). Supramax class vessels tend to be used for transoceanic transportation of bulk commodities, such as pulp; smaller 'handysizes' are used for short-sea trade.

A lot of ship-building is currently on order books, and of this, a significant amount is in the Supramax class. However, being 'on the books' does not mean it is being built. In 2009 only 59% of the order book was actually delivered; in 2010 this is estimated to rise only 2%. In the meantime, there is some shipping that is around 30 years old that is expected to be scrapped; whether scrappage and new building cancel each other, or there is a net change one way or the other, is yet to be determined.

Next, woodpulp is considered a minor bulk commodity,

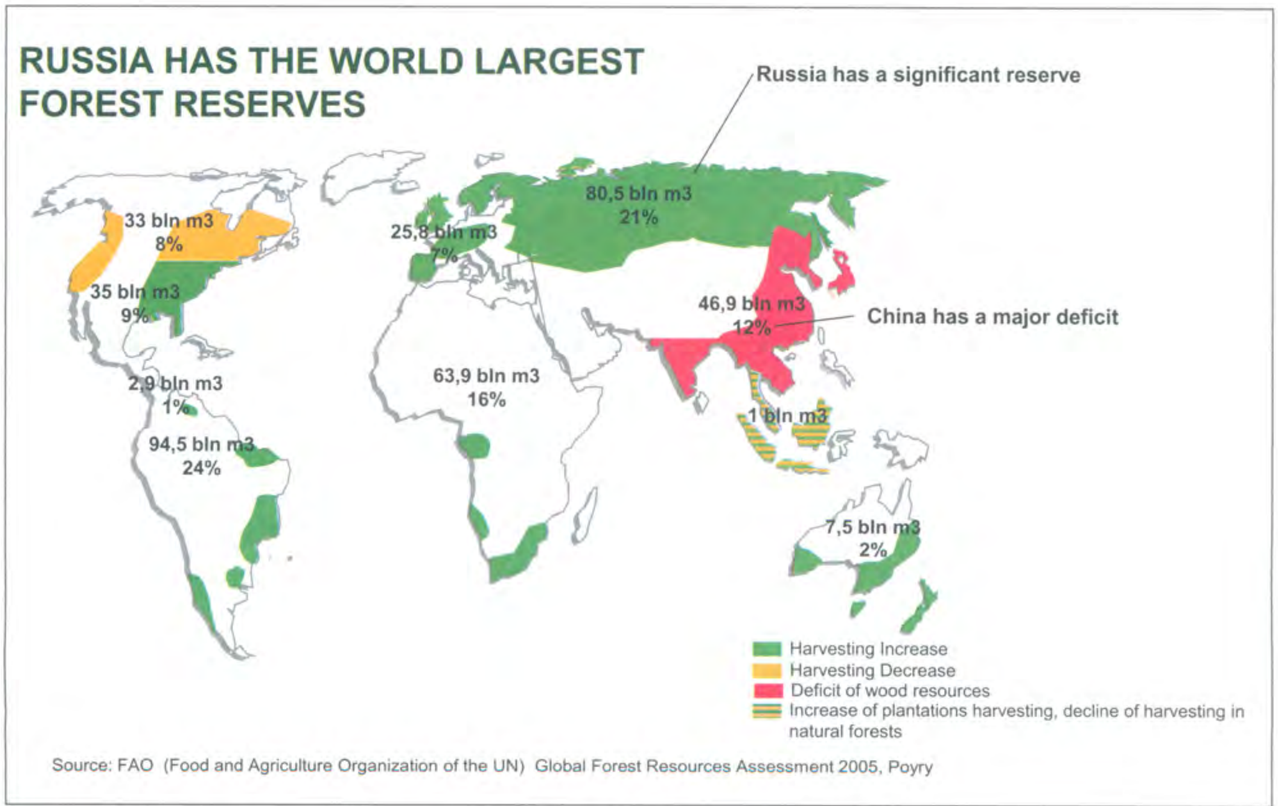


Figure 4: Global forest resources - Assessment 2005, Pöyry. (© Ilim)

which is relatively insignificant compared to the total dry cargo market. For comparison, over 50% of the world's fleet is employed in steel-related transportation of iron ore, coal, coke, and steel itself.

Tonnage is not the only factor that should be taken into consideration; vessel design is also of importance. The traditional design favoured by pulp shippers is an Open Hatch (where the hatch opening has the same width as the cargo hold), with an overhead Gantry crane. However, most of the new building program for vessels in the correct size for pulp transportation are designed with a Jib crane – these are cheaper to manufacture than Gantry crane vessels.

Overall it is likely the pulp industry will have less choice in the shipping it will be offered, because Semi-Open Hatch (where the hatch opening is narrower than the cargo hold) Jig Crane ships are becoming more common. The Forestry industry therefore has two choices: accept the change in ship design and adapt to the new restraints these impose; or help support (financially) the building of new OHG designs. The choices become especially important when it is considered that each 250kt of pulp production capacity requiring transportation equates to approximately 1 extra ship. So, compared to the situation in 2010, a proposed expansion in the pulp market of almost 11Mt by 2016 will require in excess of 40 new ships, which, according to the current order books, have not been planned. This raises the possibility that pulp availability in the future could be determined as much by ship availability as by pulp mill capacity.

Tom Wright – Hawkins Wright

As last year, the Symposium was concluded with a presentation by Tom Wright. He was destined to give a talk on 'The outlook for market pulp'; however, he broke away from that topic and concentrated almost solely upon China, giving a detailed interpretation of that country's growth over the last few years.

The reason for this concentration was that, although we are all aware the Chinese paper market has grown phenomenally over the last decade, a detailed examination of the 'official' figures suggests they are not entirely accurate. The main problem is that all values produced by China are estimates, often produced at a provincial level, as there is no central body like the CPI or CEPI that collates and distributes accurate figures. However, all values that are produced from China seem to be believed, and repeated *ad infinitum*. The danger here is that investments can be made on the basis of quite spurious figures.

Currently the 'official' figures for China suggest annual paper and board production has risen from 32Mt (2001) to 86Mt (2009); this latter figure was only itself recently revised down from 94Mt. So the year-on-year demand has been 7Mt. However, how does China utilise over 80Mtpa when *per capita* consumption is so low?

The answer, according to HW, is that they do not, and the figures are vastly inflated. Pre 1996 Chinese paper manufacturers mainly satisfied domestic markets; it is only since 1998 they have competed on the export market. Figures for the domestic market prior to 1998 are sketchy; those from later years carry more credence. Analysis of pulp usage suggests that last year China used around 44Mt of pulp (28Mt imported RCF; 12.5Mt imported woodpulp; around 4Mt domestic woodpulp). In addition to this there is domestic RCF and non-wood pulp, neither of which is easy to quantify.

HW have crunched what figures are available, and estimated those that are not, and have concluded the 2009 Chinese production figures are probably nearer to 62Mt than 86Mt. This year figures of nearer 56Mt are anticipated (although the likely 'official' figures could be in excess of 100Mt!)

In conclusion, there is no doubt China has become a dominant player in the world paper market over the last decade, but these new estimates suggest its size has been over-inflated by as much as 40%.

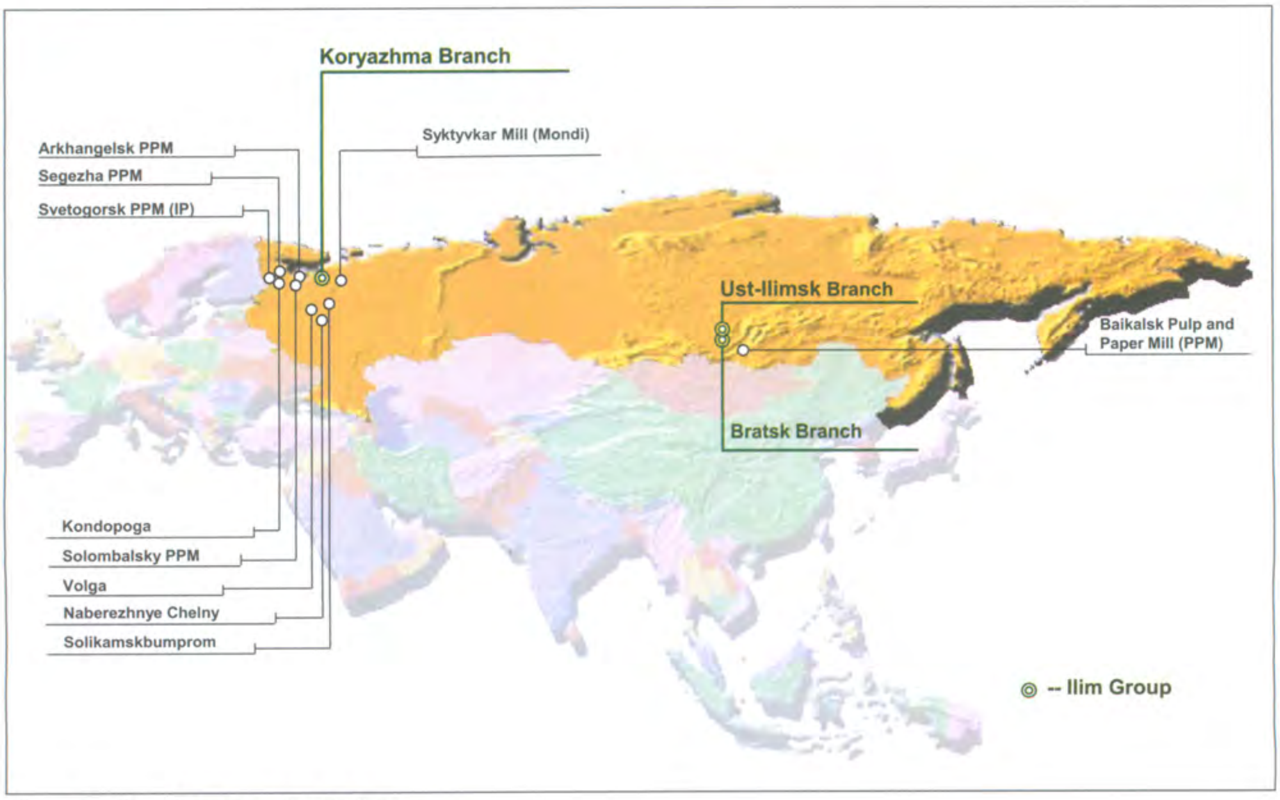


Figure 5: Site of Russian mills. (© Ilim)

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Unit 24 Parkview Industrial Estate, Brenda Road,
Hartlepool, TS25 1PE
Tel: 01429 850195 Fax: 01429 235180
Email: john.wright@scanpump.com
John Wright

SKF (UK) LTD
Rolling Bearings, Seals, Mechatronics and Lubrication Systems
Sundon Park Road, Luton, Bedfordshire, LU3 3BL
Tel: 01582-490049 Fax: 01582-848091
Email: marketing.uk@skf.com
Website: www.skf.co.uk
Phil Burge

SMURFIT KAPPA SSK LIMITED
Paper Manufacturers
Mount Street, Nechells, Birmingham
West Midlands, B7 5RE
Tel: 0121-327-1381 Fax: 0121-322-6300
Email: paul.freeman@smurfitkappa.co.uk
Paul Freeman

SMURFIT KAPPA TOWNSEND HOOK
Paper Manufacturers
Mill Street, Snodland, Kent, ME6 5AX
Email: geoff.brooks@smurfitkappa.co.uk
Geoff Brooks

SOLSTAR EUROPE LTD
Independent Technical Service & Support Company, specialising in the Tissue and Converting Markets. UK agents for National Starch, Industrial Starch Division and KAPP-CHEMIE GmbH
14 Egerton, High Legh, Knutsford, Cheshire, WA16 6PT
Tel: 01925 753879 Fax: 0161 980 0361
Email: ifb@solstareurope.com
Website: www.solstareurope.com
Ian Barrett

SONOCO ALCORE
Paper Manufacturer
Stainland Board Mills, Holywell Green,
Halifax, Yorkshire, HX4 9PY
Tel: 01422 374741 Fax: 01422 371495
Email: george.farrell@sonoco-alcore.net
George Farrell

ST REGIS PAPER CO LTD
Paper Manufacturers
Head Office, Kemsley Mill, Sittingbourne, Kent, ME10 2T
Tel: 01628 518900
Email: mike.collins@stregis.co.uk
Website: www.stregis.co.uk
Mike Collins

Higher Kings Mill
Cullompton, Devon, EX15 1QJ
Tel: 01884-836320 Fax: 01884-832146
Email: john.stoddart@stregis.co.uk
Website: www.stregis.co.uk
John Stoddart

Kemsley Mill
Paper Manufacturers
Sittingbourne, Kent, ME10 2TD
Tel: 01795-414200 Fax: 01795-414212
Email: chris.rosser@stregis.co.uk
Chris Rosser

Divisional, Technical Engineering Services Department
Kemsley Paper Mill, Sittingbourne, Kent, ME10 2TD
Tel: 01795-414252 Fax: 01795-414393

St Regis Paper Company Ltd
PO Box 15, Hollins Road, Darwen, Lancs, BB3 0BE
Tel: 01254-702728 Fax: 01254-760912
Email: graham.plummer@stregis.co.uk
Graham Plummer

STEPHENSON RECYCLING CHEMICALS
Chemical Manufacturers
Brookfoot House, Low Lane, Horsforth, Leeds,
West Yorkshire, LS18 5PU
Tel: 0113-205-0900 Fax: 0113-205-0901
Email: src@stephensongroup.co.uk
Website: www.stephensongroupuk.com
Ramesh Patel

T

TOTAL – LUBRICANTS DIVISION
Lubricants
Pottery Lane, Ferrybride, West Yorkshire, WF11 8JY
Tel: 01977 636206 Fax: 01977 677692
Email: lisa_wood@total.com
Lisa Wood

TULLIS RUSSELL PAPERMAKERS
Paper & Board Manufacturer
Markinch, Glenrothes, Fife, KY7 6PB
Tel: 01592-753311 Fax: 01592-755872
Email: jarrette@trg.co.uk
Website: www.trg.co.uk
Eileen Jarrett

Tullis Russell COATERS

U

UPM-KYMMENE (UK) LTD
Shotton Paper
Newsprint Manufacturer
Weighbridge Road, Shotton, Deeside,
Flintshire, CH5 2LL
Tel: 01244-284331 Fax: 01244-280363
Email: jonathan.edwards@upm-kymmene.com
Website: www.upm-kymmene.com
Jonathan Edwards

W

WEIDMANN WHITELEY LTD
Pool Paper Mills, Pool in Wharfedale, Otley,
West Yorkshire, LS21 1RP
Tel: 0113-202-7018 Fax: 0113-284-2272
Email: paul.hirst@wicor.com
Paul Hirst

Industry Statistics 2010

Information supplied courtesy of

cpi cepi

2009 - Summary

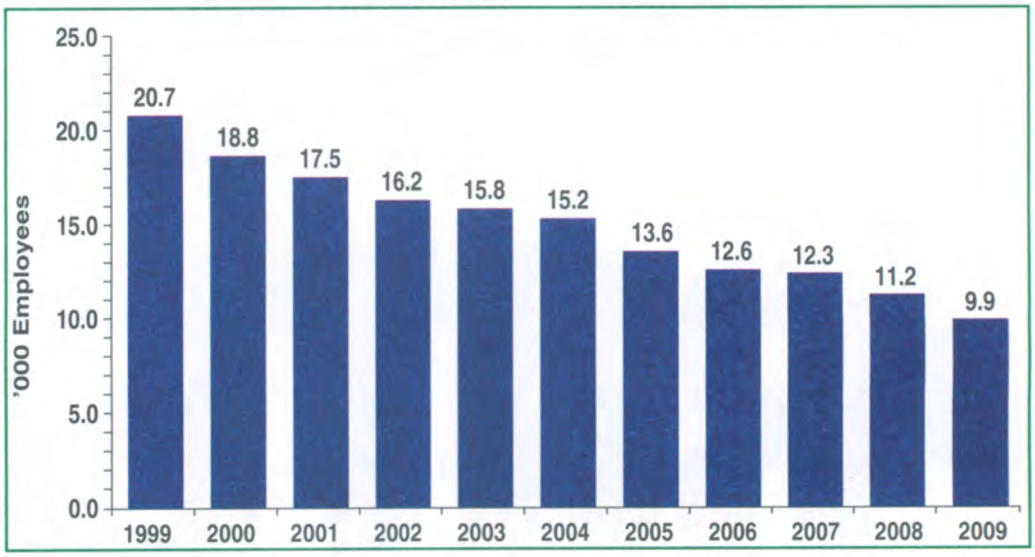
The figures for 2009 reflect the underlying poor state of the UK economy, during a period when the major adjustments in the world financial system started to kick in with vengeance. In particular, the reduction in total paper and board consumption, amounting to around 9%, reflects changes in all major sectors of the UK market: packaging, p&w and even tissue.

The reduction in UK production, of nearly 14%, was a consequence of both curtailment of output for the vast majority of mills, and in a very few cases, of mill closures: during the year we saw announcements for the closure of Rigid Paper (February), International Paper Inverurie (February), Arjo Wiggins Dartford (March) and SCA New Hythe (April). Meanwhile, in December 2009 Iggesund announced the closure of PM1 at Workington – however this was too late to affect the annual figures published here; however, the closure in late 2008 of the Sappi coated mill at Feniscowles, Blackburn, did impact the 2009 figures.

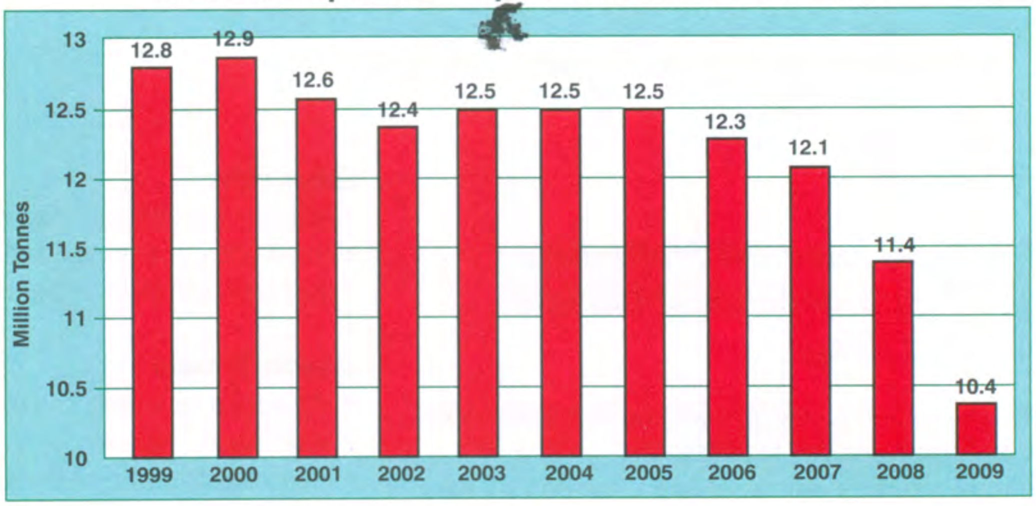
Of course it was not all 'doom and gloom'. One important ray of sunshine last year was the start of Palm Paper in Kings Lynn, Norfolk. Palm PM7 is the largest and most technically advanced newsprint machine in the world, and is a major asset to this country.

Meanwhile the UK employment figures showed an equally major drop, equivalent

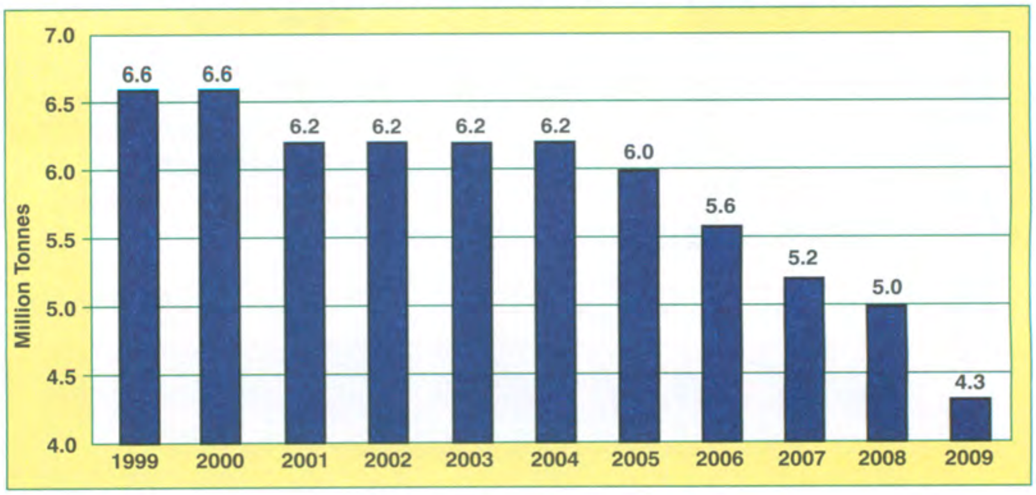
Numbers Employed in the Paper Industry 1999-2009



UK Consumption of Paper and Board 1999-2009



UK Production of Paper and Board 1999-2009



to around 12% of the workforce employed in the industry. The mill closures mentioned above account for a large proportion of this; elsewhere redundancies occurred in dribs and drabs throughout the mills and in allied industries - notable occurrences were seen at: Arjo Wiggins R&D Butler's Court (around 40), Arjo Wiggins Stoneywood Mill (nearly 50), and at Kimberly Clark Barrow Mill (almost 30).

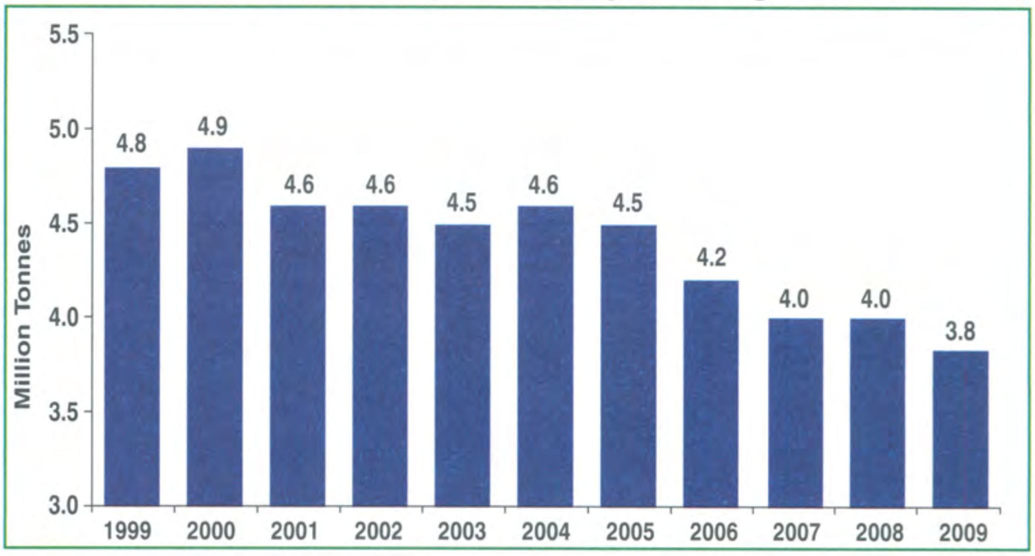
2010 – Preliminary Assessment

By contrast with 2009, 2010 has been a year of stabilisation and entrenchment. Figures shown elsewhere (by Peter Seggie in the Review Section) suggest the 2010 RCF collection tonnage is only slightly down on that from 2008, indicating the major downward trend seen last year has been halted. Only one major closure has been announced during the year: the Bridgewater Mill of Abitibi Consolidated became a casualty of the parent company's bankruptcy action. Meanwhile we also had a small but welcome success, with the resurrection of a single PM at the old Smith Anderson mill at Fettykil, now renamed Sapphire Mill, which was re-opened by Peter and Pauline Duxbury of Fourstones Paper.

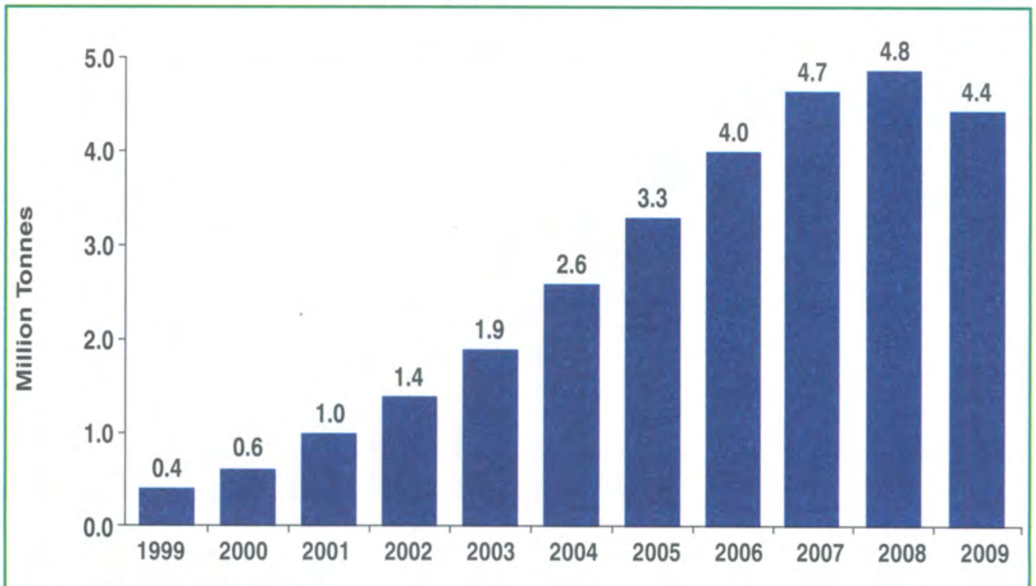
Elsewhere, two mills changed ownership during the year: LPC Group was purchased by Sofidel S.p.A., and the tissue mill at Disley, run previously by Kruger, was sold to Northwood Paper Sales Ltd. Both facilities have maintained production so the changes will not affect the annual statistics to be published next year.

Finally, the very small manufacturing facility at Apsley Paper Trail, and the more significant plant run by Inveresk near Wells,

Recovered Paper Usage in UK Papermaking 1999-2009

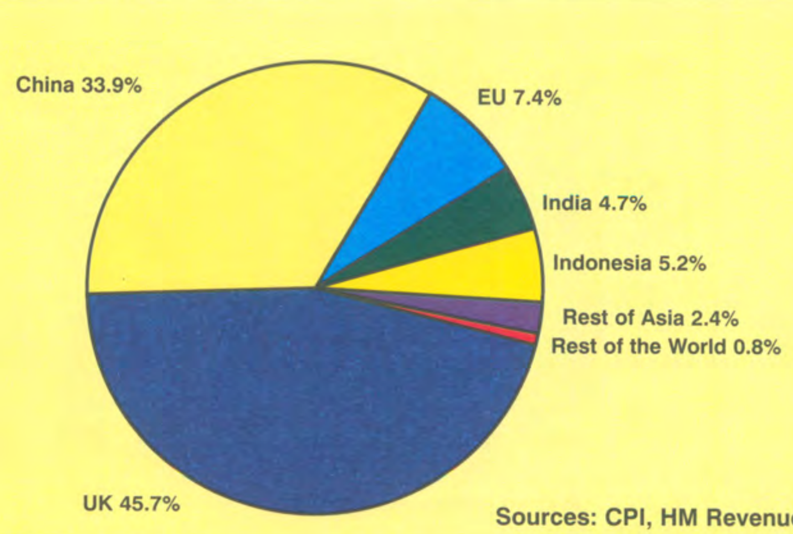


Recovered Paper Exports 1999-2009



Source: HM Revenue & Customs

Recovered Paper Markets



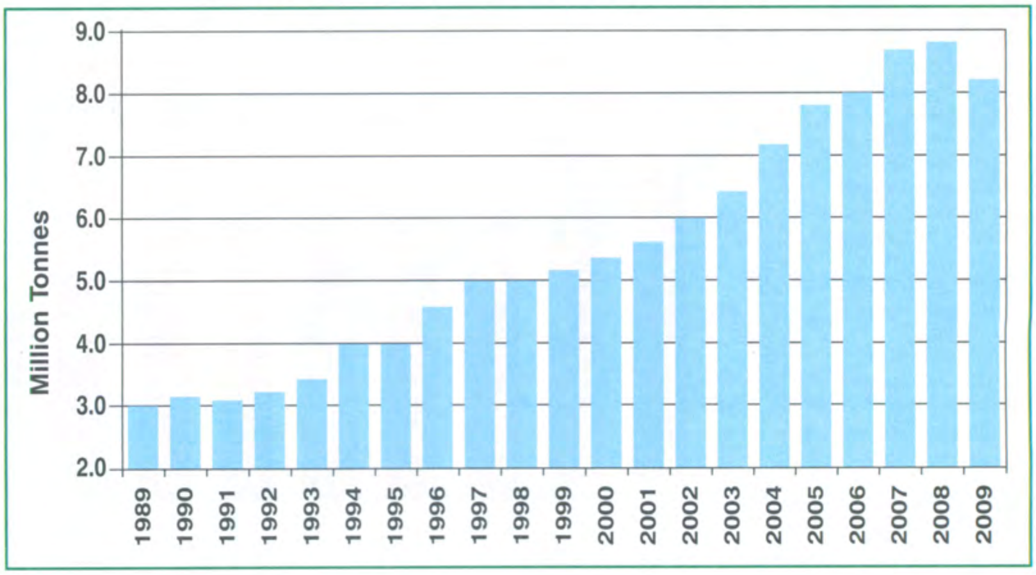
Sources: CPI, HM Revenue & Customs

both experienced financial hardship, but were rescued and have lived to fight another day. (The Inveresk mill is now being run by Henrik Bernander, who was the existing General Manager of the St. Cuthberts site.)

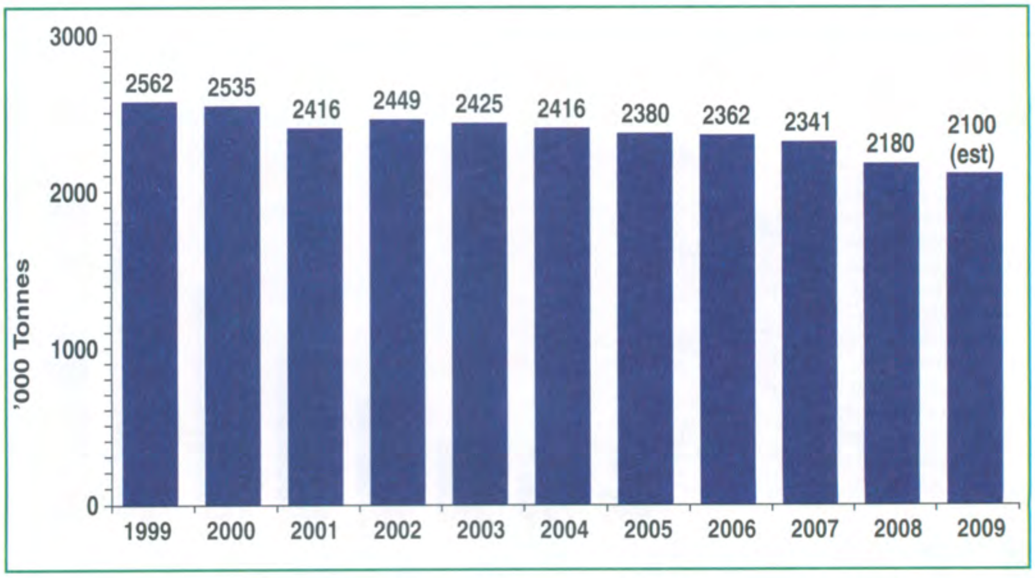
In conclusion, the hardships of 2009 appear to have been weathered and most in the industry have survived intact. So when we come to report upon the 2010 figures next year, I hope a slightly brighter picture will emerge.

Daven Chambelain

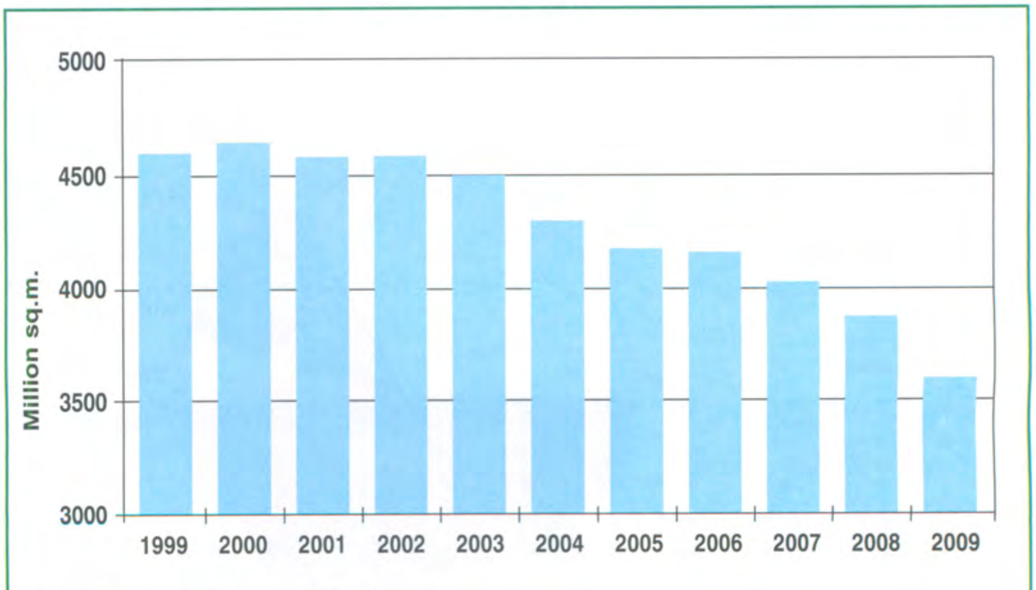
Recovered Paper Collection 1989-2009



Consumption of Paper by Corrugators 1999-2009



Corrugated Production of Corrugated Boxes 1999-2009



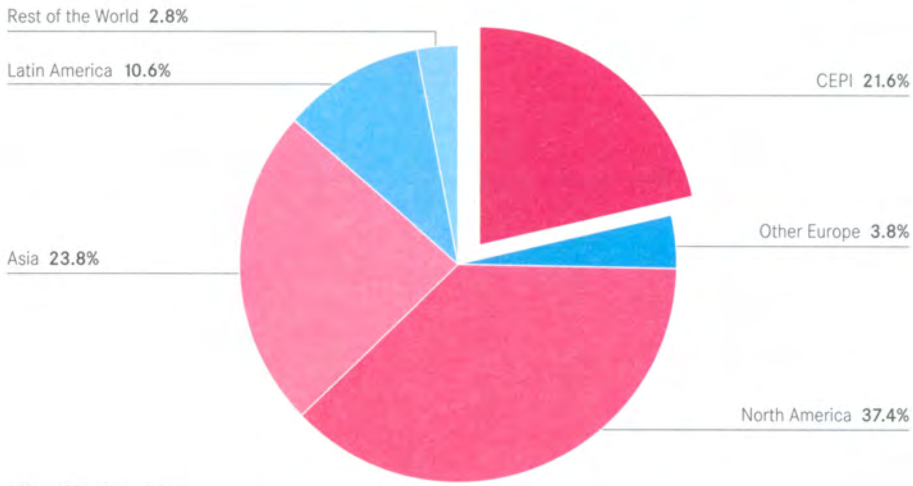
Sources: 1999-2003 FEFCO; 2004-2009 CPI

Industry Facts 2009

CPI Member Companies	75
CPI Member Sites	265
CPI Member Employees	24,500
Paper & Board Production* ('000 Tonnes)	4,292.6
Corrugated Production (Million Sq. Metres)	3,653.6
Recovered Paper Collection ('000 Tonnes)	8,154.8
Tissue Parent Reel Production ('000 Tonnes)	736.3

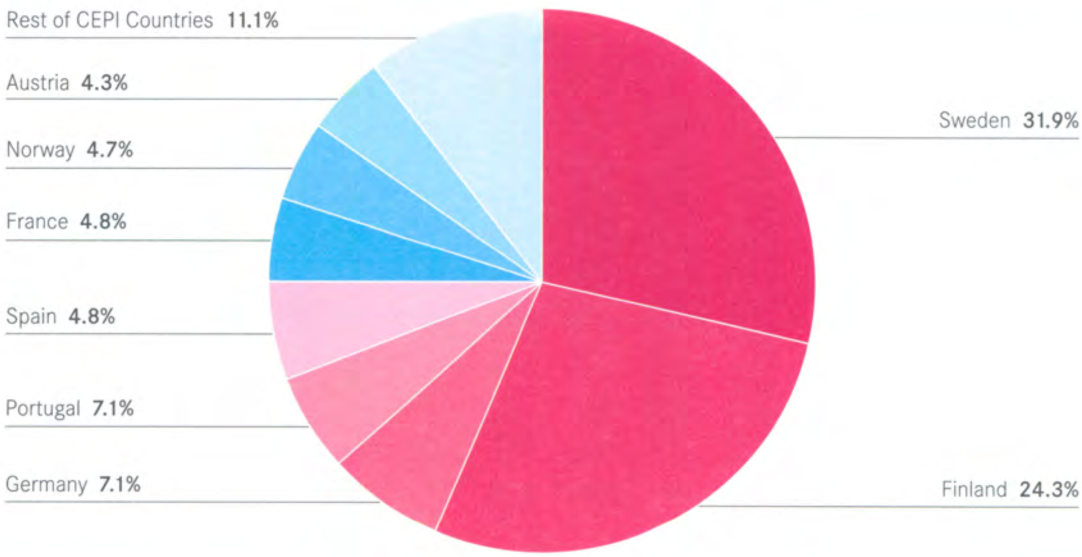
* includes parent reel production

Pulp – Global View
Pulp Production by Region in 2008

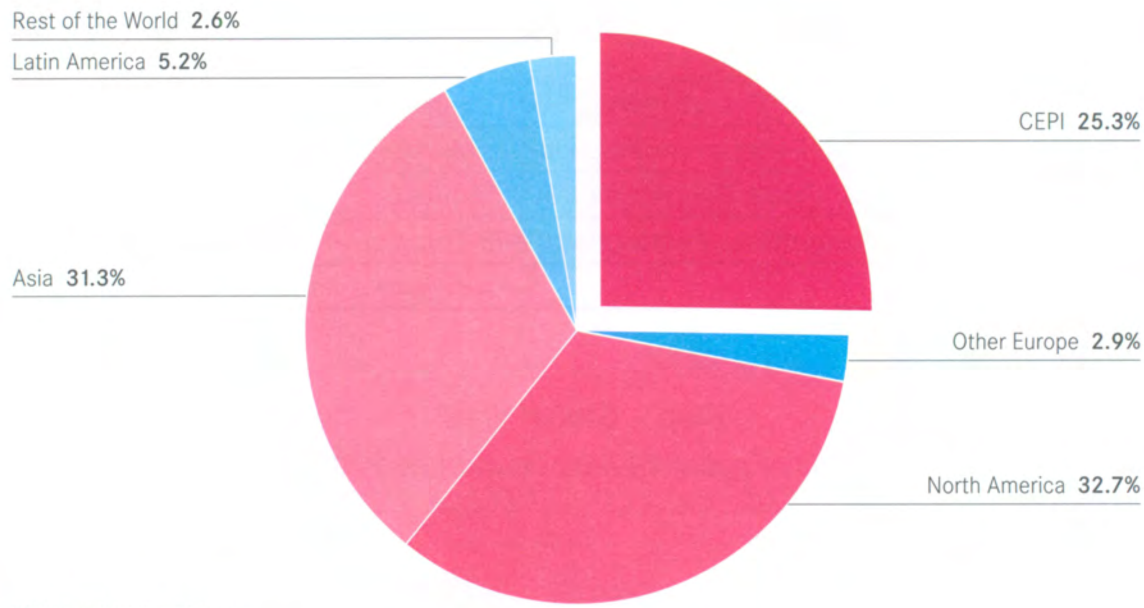


TOTAL: 192.1 Million Tonnes
% change over previous year: -1.6
Sources: CEPI, RISI

Pulp Production by CEPI Country in 2009

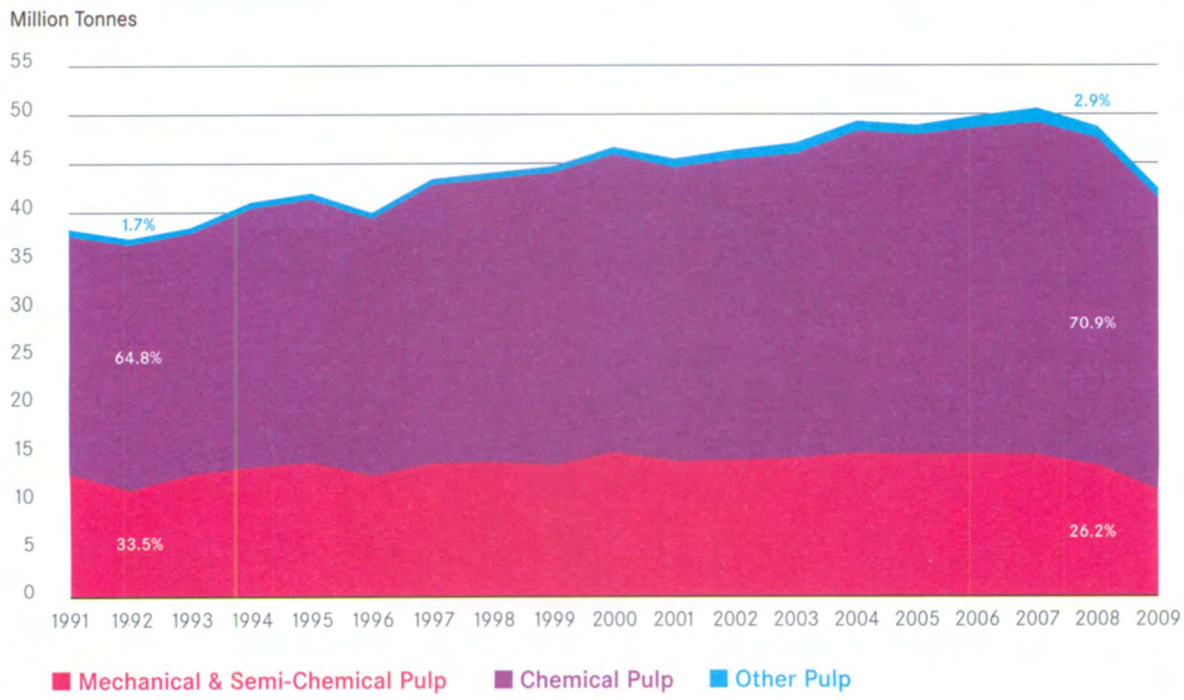


Pulp Consumption by Region in 2008



TOTAL: 192.8 Million Tonnes
% change over previous year: -1.2
Sources: CEPI, RISI

Pulp Consumption by Grade in CEPI Countries 1991–2009



Pulp

CEPI Exports of Pulp to Other Regions 2005–2009

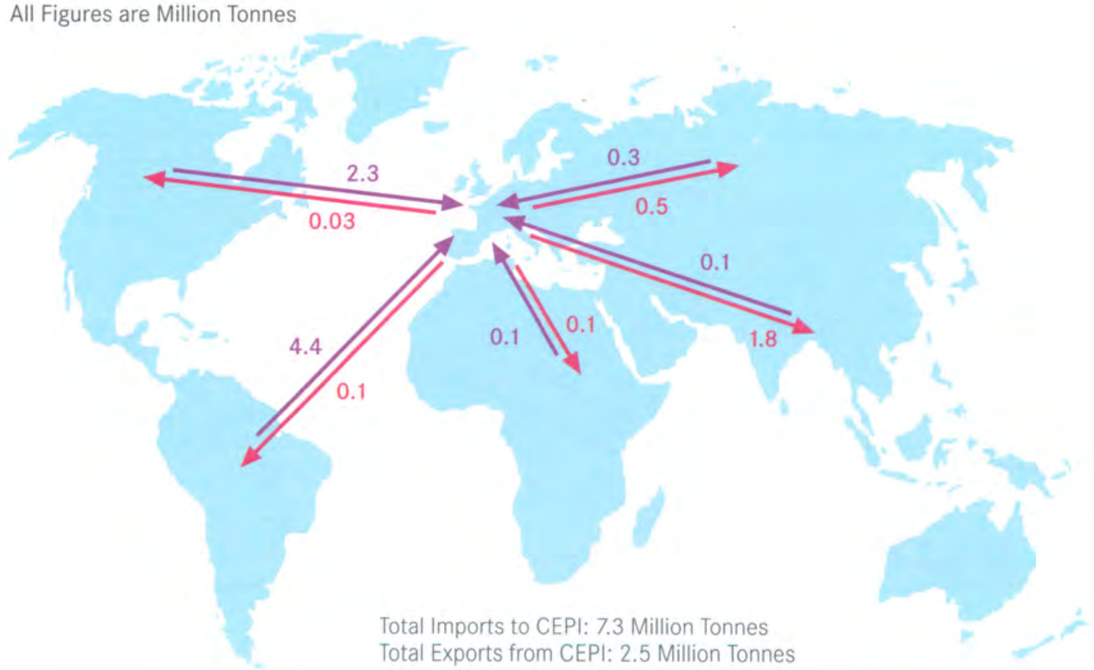
'000 Tonnes	2005	2006	2007	2008	2009	Share of Total %	% Change 2009/2008
Other Europe	507	518	539	550	484	19.4	-12.0
North America	187	195	155	42	31	1.3	-26.4
Latin America	20	23	29	35	53	2.1	51.9
Asia	1 090	1 326	1 196	1 287	1 789	71.6	39.0
Rest of the World	109	122	104	162	141	5.7	-12.6
Total	**1 913**	**2 184**	**2 023**	**2 075**	**2 498**	**100.0**	**20.4**

CEPI Imports of Pulp from Other Regions 2005–2009

'000 Tonnes	2005	2006	2007	2008	2009	Share of Total %	% Change 2009/2008
Other Europe	517	468	412	430	306	4.2	-28.9
North America	3 958	3 651	3 204	2 804	2 335	32.1	-16.7
Latin America	2 835	3 384	4 108	4 385	4 411	60.7	0.6
Asia	197	137	130	158	75	1.0	-52.9
Rest of the World	432	353	299	137	143	2.0	4.7
Total	**7 939**	**7 993**	**8 152**	**7 914**	**7 269**	**100.0**	**-8.2**

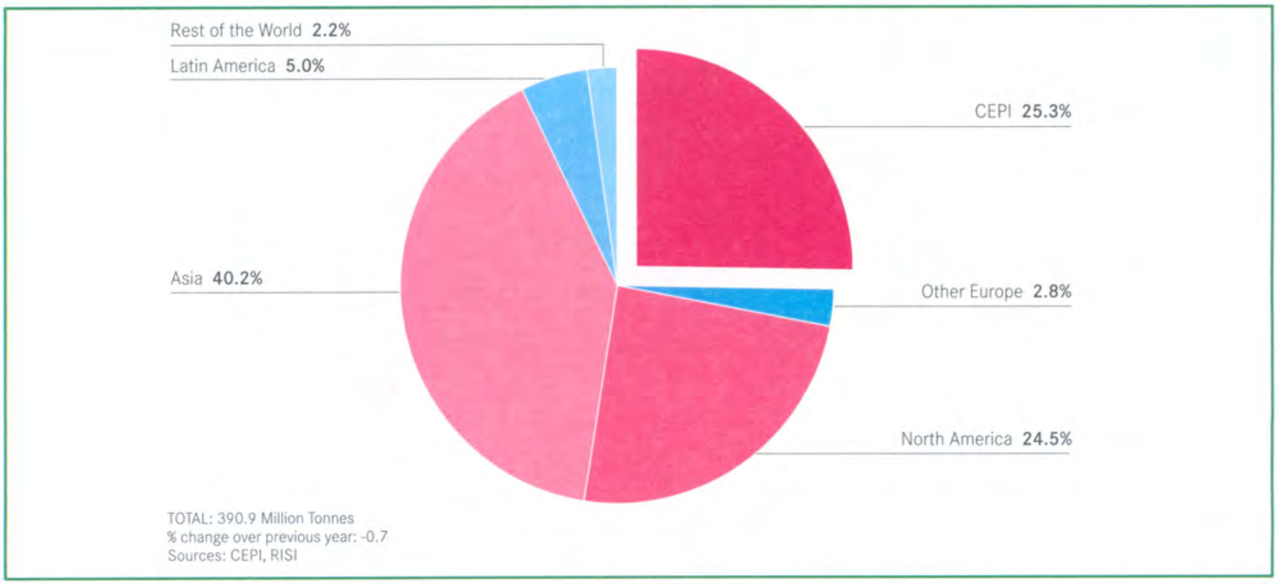
Trade Flows of Pulp to and from CEPI Countries in 2009

All Figures are Million Tonnes

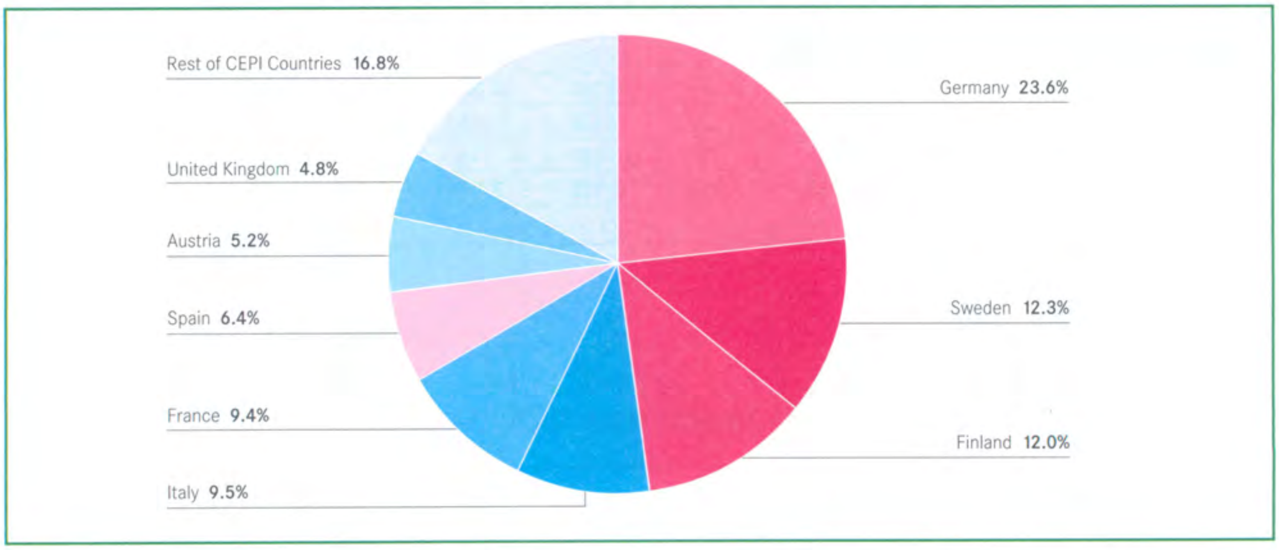


Total Imports to CEPI: 7.3 Million Tonnes
Total Exports from CEPI: 2.5 Million Tonnes

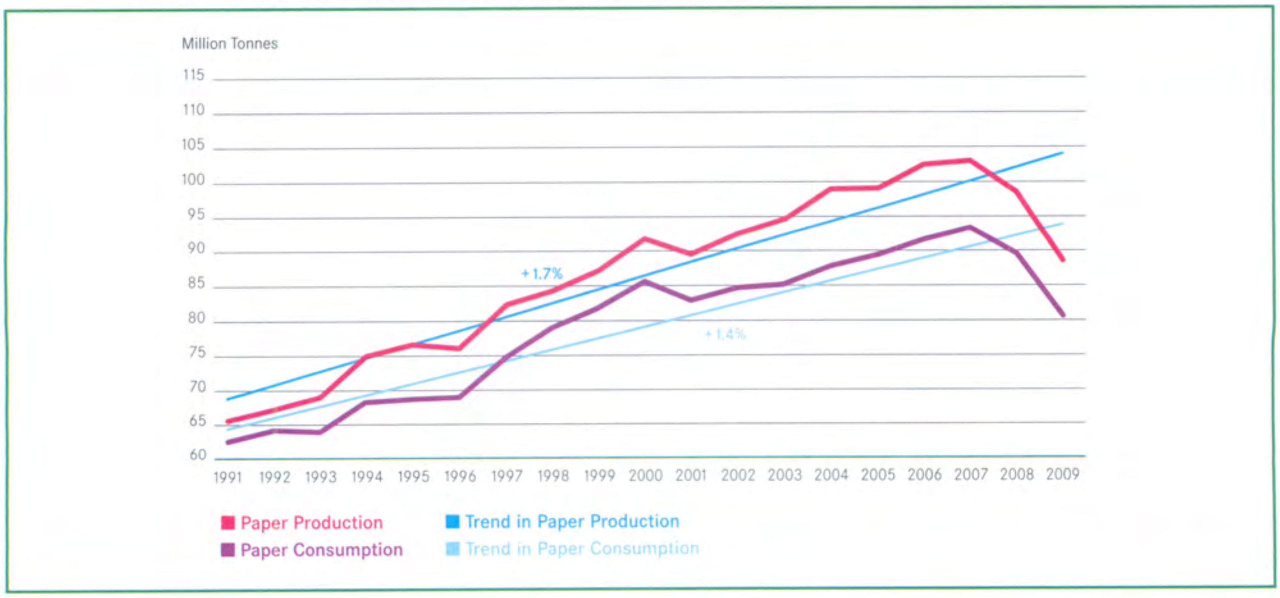
Paper – Global View
Paper Production by Region in 2008



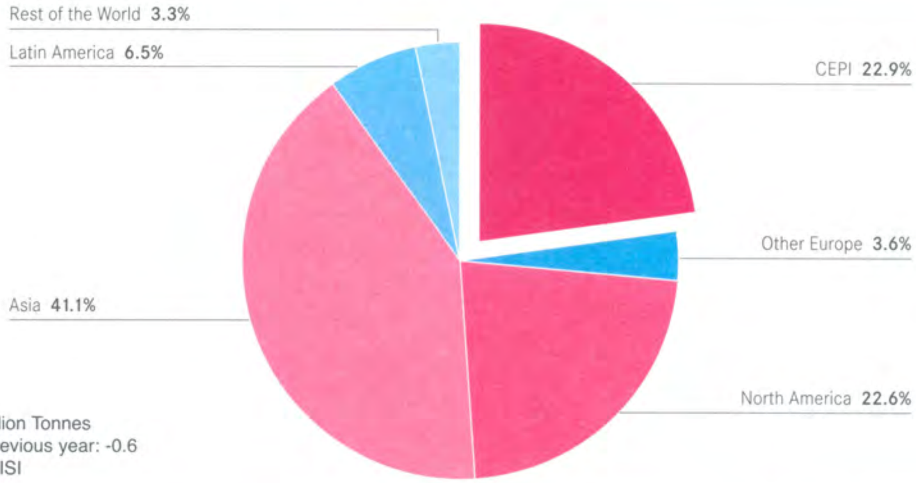
Paper Production by CEPI Country in 2009



Paper Production and Consumption in CEPI Countries 1991–2009



Paper Consumption by Region in 2008



TOTAL: 391.6 Million Tonnes
% change over previous year: -0.6
Sources: CEPI, RISI

CEPI Exports of Paper to Other Regions 2005–2009

'000 Tonnes	2005	2006	2007	2008	2009	Share of Total %	% Change 2009/2008
Other Europe	5 689	6 096	6 349	6 203	5 314	35.8	-14.3
North America	2 811	2 989	2 613	2 098	1 501	10.1	-28.4
Latin America	1 194	1 443	1 475	1 378	1 075	7.2	-22.0
Asia	4 724	4 568	4 686	4 688	4 744	31.9	1.2
Rest of the World	2 180	2 472	2 540	2 563	2 228	15.0	-13.1
Total	**16 598**	**17 568**	**17 663**	**16 930**	**14 862**	**100.0**	**-12.2**

CEPI Imports of Paper from Other Regions 2005–2009

'000 Tonnes	2005	2006	2007	2008	2009	Share of Total %	% Change 2009/2008
Other Europe	1 942	1 563	1 553	1 621	1 491	31.8	-8.0
North America	1 921	1 613	2 219	2 062	1 769	37.7	-14.2
Latin America	499	436	421	561	454	9.7	-19.2
Asia	391	370	692	524	651	13.9	24.0
Rest of the World	372	392	533	391	330	7.0	-15.6
Total	**5 125**	**4 374**	**5 418**	**5 160**	**4 694**	**100.0**	**-9.0**

Trade Flows of Paper to and from CEPI Countries in 2009

All Figures are Million Tonnes

Total Imports to CEPI: 4.7 Million Tonnes
Total Exports from CEPI: 14.9 Million Tonnes

Paper Mills in the UK

AHLSTROM CHIRNSIDE LTD
Chirnside Paper Mill
Chirnside, Duns, Berwickshire, TD11 3JW
Telephone: 01890-818303
Fax: 01890-818256
Products: Teabag, Speciality
Machinery: 2PM & dry-laid
MD: Michael Black

APSLEY PAPER TRAIL
Frogmore Paper Mill & Visitor Centre
Apsley, Hemel Hempstead, Herts, HP3 9RY
Telephone: 01442-234600
Fax: 01442-275749
Products: Fine, Speciality, Artist / Watercolour
Machinery: 2PM & hand-making
Manufacturing facility leased by: Jim Patterson

ARJO WIGGINS CHARTHAM LTD
Chartham Paper Mill
Station Road, Chartham, Canterbury, CT4 7JA
Telephone: 01227-813500
Fax: 01227-730026
Products: Tracing
Machinery: 2PM
Mill Manager: Mark Hobday

ARJO WIGGINS FINE PAPERS LTD
Stoneywood Mill
Bucksburn, Aberdeen, AB21 9AB
Telephone: 01224-802200
Fax: 01224-802373
Products: Fine, Industrial (Casting)
Machinery: 4PM & 1Coater (tandem)
Mill Manager: Angus MacSween

ARJO WIGGINS IVYBRIDGE LTD
Stowford Mill
Ivybridge. Devon, PL21 0AA
Telephone: 01752-612100
Fax: 01752-612102
Products: Security, Fine
Machinery: 2PM
Mill Manager: Clive Wilson

AYLESFORD NEWSPRINT LTD
Newsprint House, Bellingham Way,
Aylesford, ME20 7DL
Telephone: 01622-796000
Fax: 01622-796001
Products: Standard Newsprint (100% RCF)
Machinery: 2PM (No13 & No14) & DIP
MD: Bengt Blomberg

BILLERUD BEETHAM LTD
Waterhouse Mills
Beetham, Milnthorpe, Cumbria, LA7 7AR
Telephone: 01539-565000
Fax: 01539-565033
Products: Speciality (food, health care, industrial)
Machinery: 2 MG; 2 off-line wet crepe machines.
Mill Manager: Ying Sou

CARLSON FILTRATION LTD
Butts Mill
Barnoldswick, Lancs, BB18 5HP
Telephone: 01282-811000
Fax: 01282-811001
Products: Speciality Filter
Mill Manager: David Dredge

DE LA RUE INTERNATIONAL LTD
Overton Mill
Overton, Hampshire, RG25 3JG
Telephone: 01256-770770
Fax: 01256-770937
Products: Banknote, Security
Machinery: 4PM (cylinder)
Mill Manager: Tim O'Leary

DE LA RUE SECURITY PAPERS
Bathford Paper Mills
Bathford, Bath, BA1 7QG
Telephone: 01225-858243
Fax: 01225-852128
Products: Security (not Banknote)
Machinery: 1PM (cylinder)
MD: Laura Redman-Thomas

DISLEY TISSUES LTD
Disley Mill
Waterside, Disley, Cheshire, SK12 2HW
Telephone: 01663-762701
Fax: 01663-762461
Products: Tissue
Machinery: 1TM & DIP
General Manager: Chris Wickham

FOURSTONES PAPER MILL CO LTD
South Tyne Mill
Fourstones, Hexham,
Northumberland, NE46 3SD
Telephone: 01434-602444
Fax: 01434-607046
Products: Creped grades
Machinery: 1TM
MD: Peter Duxbury

FOURSTONES PAPER MILL CO LTD
Sapphire Mill
Lesley, Glenrothes, Fife, KY6 3AQ
Telephone: 01592-328652
Fax: 01592-328652
Products: Tissue
Machinery: 1TM
Joint MDs: Peter Duxbury

GEORGIA PACIFIC GB LTD
Bridgend Paper Mills
Llangynwyd, Nr Bridgend,
Mid Glamorgan, CF34 9RS
Telephone: 01656-684500
Fax: 01656-684501
Products: Tissue
General Manager: Andrew Selby

GEORGIA PACIFIC GB LTD
Stubbins Mill
Stubbins Lane, Ramsbottom,
Bury, Lancs, BL0 0NH
Telephone: 01706-283000
Fax: 01706-283001
Products: Tissue
Machinery: 2TM & DIP
MD: Hugh McGlasson

GLATFELTER UK LTD
Lydney Paper Mill
Church Road, Lydney,
Gloucestershire, GL15 5EJ
Telephone: 01594-842235
Fax: 01594-844213
Products: Teabag
Machinery: 3PM
Mill Manager: David Foulds

HOLLINGSWORTH & VOSE COMPANY LTD
Postlip Mills
Winchcombe, Cheltenham,
Gloucestershire, GL54 5BB
Telephone: 01246-602227
Fax: 01246-604099
Products: Speciality Filter, Battery Separator
Machinery: 2PM
MD: A Jenkins

IGGESUND PAPERBOARD (WORKINGTON) LTD
Siddick, Workington, Cumbria, CA14 1JX
Telephone: 01900-601000
Fax: 01900-605000
Products: Folding Boxboard
Machinery: 1BM & TMP Pulping Plant
Mill Manager: Ola Schultz-Eklund

INTERTISSUE LTD
Brunel Way, Neath, SA11 2HZ
Telephone: 01639-825380
Fax: 01639-825381
Products: Tissue
Machinery: 1TM
Operations Director: Giuseppe Munari

JAMES CROPPER PLC
Burneside Mills
Kendal, Cumbria, LA9 6PZ
Telephone: 01539-722002
Fax: 01539-728088
Products: Fine, Industrial
Machinery: 4PM & speciality formers
Operations Director: Patrick Willink

KIMBERLY CLARK LTD
Barrow Mill
Barrow in Furness, Cumbria, LA14 4WZ
Telephone: 01229-495000
Fax: 01229-495001
Products: Tissue

KIMBERLY CLARK LTD
Flint Mill
Aber Road, Flint, Flintshire, CH6 5EX
Telephone: 01352-805000
Fax: 01352-805001
Products: Tissue

KIMBERLY CLARK LTD
Delyn Mill
Aber Road, Flint, Flintshire, CH6 5EX
Telephone: 01352-805000
Fax: 01352-805001
Products: Tissue

KIMBERLY CLARK LTD
Coleshill Mill
Aber Road, Flint, Flintshire, CH6 5EX
Telephone: 01352-805000
Fax: 01352-805001
Products: Tissue

KIMBERLY CLARK LTD
Northfleet Mill
Crete Hall Road, Gravesend, DA11 9AD
Telephone: 01474-336000
Fax: 01747-336478
Products: Tissue

LPC UK LIMITED
Leicester, LE5 1TZ
Telephone: 01162-460888
Fax: 01162-460222
Products: Tissue
Machinery: 2TM
Northern Tissue Group Ltd
Lansil Way, Lancaster, LA1 3QY
Telephone: 01524-844600
Fax: 01524-842800
Products: Tissue
Machinery: 1TM
Mill Manager: Stefano Marenco

PALM PAPER LTD
King's Lynn, Norfolk, PE34 3AL
Telephone: 01553-782222
Fax: 01553-782223
Products: Standard Newsprint (from 100% RCF)
Machinery: 1PM & DIP
Co MDs: Derek Harman & Dr. Thomas Welt

PETER GRANT PAPERS LTD
Lansil Way, Caton Road, Lancaster, LA1 3PQ
Telephone: 01524-843678
Fax: 01524-843644
Products: Tissue
Machinery: 1TM
Mill Manager: Jim Gordon

POOL PAPER MILLS
Weidmann Whitely Ltd
Pool-in-Wharfedale, Otley,
West Yorkshire, LS21 1RP
Telephone: 01132-842121
Fax: 01132-842272
Products: Insulation, Pressboard
Machinery: 2PM
MD: Paul Hirst

PRESTON BOARD & PACKAGING LTD
Romiley Board Mill
Oakwood Road, Romiley, Nr Stockport,
Cheshire, SK6 4DZ
Telephone: 0161-430-6061
Fax: 0161-406-6114
Products: Unlined Chipboard, Cardboard (tubes, edge protection, layer pad, sheets)
Machinery: BM, 6 spiral tube machines,
2 convolute tube machines, 1 sheeter
Mill Manager: John Johnson

PURICO GROUP LIMITED
Devon Valley Mill Ltd
Exeter, Devon, EX5 4RF
Telephone: 01392-881731
Fax: 01392-883550
Products: Teabag, Overlay, Sausage Casing.
Machinery: 1PM
Mill Manager: Mr. H Blum

PURICO GROUP LIMITED
Union Papertech Ltd
Simpson Clough Mill
Ashworth Road, Heywood,
Lancashire, OL10 4BE
Telephone: 01706-364121
Fax: 01706-624944
Products: Teabag, Coffee Filter
Machinery: 2PM
Mill Manager: Alastair Hume

SCA HYGIENE PRODUCTS LTD
Chesterfield Paper Mill
Walton, Chesterfield, S40 2PH
Telephone: 01246-558557
Fax: 01246-558556
Products: Tissue
Machinery: 1TM
Mill Manager: David Harris

SCA HYGIENE PRODUCTS LTD
Oakenholt Mill
Oakenholt, Nr Flint, Flintshire, CH6 5PU
Telephone: 01352-732101
Fax: 01352-732760
Products: Tissue
Machinery: 2TM
Plant Manager: Colin Popplewell

SCA HYGIENE PRODUCTS LTD
Prudhoe Mill
Prudhoe, Northumberland, NE42 6HE
Telephone: 01661-806000
Fax: 01661-806002
Products: Tissue
Machinery: 2TM & converting
Location Manager: Andy Woodburn

SCA HYGIENE PRODUCTS LTD
Trafford Park Road, Trafford Park, Manchester, M17 1NX
Telephone: 0161-888-6002
Fax: 0161-888-6195
Products: Tissue
Machinery: 1TM
Location Manager: Robert Fuhrmann

SMURFIT KAPPA PAPER UK
Smurfit Kappa SSK
Mount Street, Nechells, Birmingham, B7 5RE
Telephone: 0121-327-1381
Fax: 0121-322-6300
Products: Corrugated Case Medium (Recycled Fluting, Testliner 2 & 3)
Machinery: 1PM (No4 – twin-wire)
Operations Director: Paul Freeman
Production Manager: Nigel Pontin

SMURFIT KAPPA TOWNSEND HOOK
Mill Street, Snodland, Kent, ME6 5AX
Telephone: 01634-240205
Fax: 01634-248046
Products: Corrugating Medium, Testliner 2 & 3
Machinery: 2PM
Operations Director: Geoff Brooks

SONOCO BOARD MILLS LTD
Stainland Mills
Holywell Green, Halifax,
West Yorkshire, HX4 9PY
Telephone: 01422-374741
Fax: 01422-371495
Products: Coreboard, Laminate Board, Display Board Middles, Chipboard
Machinery: 1BM (multi-vat)
Mill Manager: Phil Woolley

SPRINGFIELD MILL - WHATMAN PLC
Maidstone, Kent, ME14 2LE
Telephone: 01622-676670
Fax: 01622-691425
Products: Speciality Filter, Blotting, Diagnostic grades
Machinery: 3PM (1 Fourdrinier, 2 cylinder)
Production Manager: Mike Cooper

ST CUTHBERTS MILL LTD
Wells, Somerset, BA5 1AG
Telephone: 01749-672015
Fax: 01749-678844
Products: Artist / Watercolour
Machinery: 1PM (cylinder)
CEO: Henrik Bernander

ST REGIS PAPER COMPANY LTD
Wansbrough Paper Mill
Watchet, Somerset, TA23 0AY
Telephone: 01984-631456
Fax: 01984-634123
Products: Coreboard, Testliner 3, Envelope, Wrappings
Machinery: 2PM
Operations Director: Chris Kellaway

ST REGIS PAPER COMPANY LTD
Hollins Paper Mill
PO Box 15, Hollins Road, Darwen,
Lancashire, BB3 0BE
Telephone: 01254-702728
Fax: 01254-873358
Products: White Top Testliner, Mottle Top Testliner, T2, T3, Chip grades for Corrugating, Roofing paper, Imitation Kraft
Machinery: 2PM
Mill Manager: Graham Plummer

ST REGIS PAPER COMPANY LTD
Higher Kings Mill
Cullompton, Devon, EX15 1QJ
Telephone: 01884-863600
Fax: 01884-836333
Products: Recycled coloured paper and board
Machinery: 1PM
MD: Alan Kennedy

ST REGIS PAPER COMPANY LTD
Kemsley Paper Mill
Sittingbourne, Kent, ME10 2TD
Telephone: 01795-414200
Fax: 01795-564555
Products: Fluting, Testliner, Plasterboard and DIP (all from 100% RCF)
Machinery: 3PM (No3, No4 & No6) & DIP
Mill Manager: Mark Steadman

SUNDEALA LTD
Middle Mill
Dursley, Gloucestershire, GL11 5LQ
Telephone: 01453-540900
Fax: 01453-549085
Products: Thick boards (from 100% recycled newsprint)
Machinery: Speciality pressing equipment
Production Director: John Timpany

TULLIS RUSSELL GROUP
Markinch, Glenrothes, Fife, KY7 6PB
Telephone: 01592-753311
Fax: 01592-755872
Products: Fine
Machinery: 1PM (twin wire) & coaters
Mill Manager: Rod Cook

TWO RIVERS PAPER COMPANY
Pitt Mill, Roadwater, Watchet,
Somerset, TA23 0QS
Telephone: 01984-641028
Fax: 01984-640282
Products: Artist / Watercolour
Machinery: 0 (hand-made mill)
Owner: Jim Patterson

UPM KYMMENE (UK) LTD
Caledonian Paper
Meadowhead Road, Shewalton,
Irvine, KA11 5AT
Telephone: 01294-312020
Fax: 01294-314400
Products: Coated Magazine
Machinery: 1PM with coater; Pulping Plant
Mil Manager: Gordon Mitchell

UPM-KYMMENE (UK) LTD
Shotton Paper
Weighbridge Road, Shotton, Deeside,
Flintshire, CH5 2LL
Telephone: 01244-280000
Fax: 01244-280363
Products: Standard Newsprint (from 100% RCF)
Machinery: 2PM & DIP
General Manager: David Ingham

Paper Mills in Belgium

AHLSTROM MALMEDY SA
Av. Du Pont de Warche
B-4960 Malmedy
Belgium
Tel: +32 (0) 80 79 54 14
Fax: +32 (0) 80 79 54 16
Web Site: www.ahlstrom.com

IDEM PAPERS S.A.
Rue d'Asquempont 2
1460 Virginal-Samme
Belgium
Tel: +32 (67) 28-12-11
Fax: +32 (67) 28-16-40

BURGO ARDENNES S.A.
Rue de la Papeterie 1
B-6760 Virton
Belgium
Tel: +32 063 58 70 12
Fax: +32 063 58 70 09
Web Site: www.burgo.com

KARTONFABRIEK ST.-LEONARD NV
Vaucampslaan 84
1654 Huizingen
Belgium
Tel: +32 (0) 23565789
Fax: +32 (0) 23610564

CARTONNERIES COOSEMANS N.V.,
Fabrique de Carton Gris
Oude Vijverweg 12
1653 Dworp
Belgium
Tel: +32 (2) 380-07-33
Fax: +32 (2) 380-88-04
E-Mail: coosemans@hermet.fr.
Web Site: www.hermet.fr.

CATALA S.A.
Grand Route 302
1620 Drogenbos
Tel: +32 (0)2334 06 11
Fax: +32 (0)2378 16 35
Web Site: www.catala.be

LPC BELGIUM N.V.
A. Stocletlaan 3
2570 Duffel
Belgium
Tel: +32 (0) 15/30 06 11
Fax: +32 (0) 15/31 39 34

OUDEGEM PAPIER N.V.
Oude baan 120
9200 Dendermonde
Belgium
Tel: +32 (0)52/26 19 11
Fax: +32 (0)52/21 85 05
Web Site: www.vpk.be

SAPPI LANAKEN NV
Montaigneweg 2
3620 Lanaken
Belgium
Tel: +32(89) 71 97 19 / 089 71 96 66
Fax: +32(89) 71 92 22

SCA CONTAINERBOARD
Business Park Twin Squares
Culliganlaan 1 D
1831 Diegem
Belgium
Tel: +32 (0) 27183783
Fax: +32 (0) 27183785
Website: www.scacontainerboard.com

SCA HYGIENE PRODUCTS SA/NV
Culliganlaan 1D
BE-1831 DIEGEM
Belgium
Tel: +32 (2) 766 05 11
Fax: +32 (2) 766 05 00
Website:www.sca.com

SCA HYGIENE PRODUCTS SA/NV
Rue de la Papeterie 2,
4801 Stembert.
Belgium
Tel: +32 (87) 30-66-11.
Fax: +32 (87) 33-94-24

STORA ENSO LANGERBRUGGE PAPER
Wondelgemkaai 200
9000 Gent
Belgium
Tel: +32 (9) 25 77 211
Fax: +32 (9) 25 77 200

OUDEGEM PAPIER NV, CORRUGATED BOARD DIVISION / VPK PACKAGING GROUP
Oude Baan 120
9200 Dendermonde
Belgium
Tel: +32 (52) 26-19-15.
Fax: +32 (52) 21-85-05.
Web Site: www.vpkgroup.com

European Liaison Committee for Pulp and Paper

President: Yrjö-Pekka Rautallahti (Finland) c/o UPM-Kymmene Corporation
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The General Secretariat remains in Paris primarily for legal reasons as EUCEPA is a French registered body. In practical terms the operation of EUCEPA is hosted on a six month rotation by the member Associations.

***NB** to dial any European telephone number from the UK, replace (+) by (00); to dial the UK from Europe prefix UK by (00) with the exception of Spain which is (07) and Sweden (009)*

Austria
ÖZEPA
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A-1061 Wien, Gumpendorferstraße 6, Vienna, Austria.
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Fax: +43-1-588-86-222.
e.mail:zettl@austropapier.at
Year of Foundation: 1912
President: Wolfgang Pfarl *General Secretary:* Claus Zettler

Czech/Slovak Republics
SPPC
Czech Paper Technical Association
Novotného lávka 5, CZ 116 68 Praha 1, Czech Republic.
Tel: +420-2-210-82272. Fax: +420-2-210-82272.
e.mail:ivocharvat@tiscali.cz
Year of Foundation: 1969
Chairman: Ivo Charvát (Czech Republic)
Secretary: Ludmila Belicova

Finland
PI
The Finnish Paper Engineers Association
P.O. Box 118, FIN-00171 Helsinki, Finland.
Tel: +358-9-132-6696. Fax: +358-9-630-365.
e.mail:pirkko.molkentin-matilainen@papereng.fi
Year and Place of Foundation: 1914, Helsinki
Chairman: Mikko Jokio
President: Pirkko Molkentin-Matilainen

France
ATIP
Technical Association of the French Paper Industry
154 Boulevard Haussmann, F-75008 Paris, France
Tel: +33-1-45-62-11-91. Fax: +33-1-45-63-53-09.
e.mail: daniel.gomez@ctp.inpg.fr
Year and Place of Foundation: 1947, Paris
Chairman: L. Lanat *General Secretary:* D. Gomez

Germany
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Association of Chemists and Engineers of the Pulp and Paper Industry
Emilstraße 21, D-64293 Darmstadt, Germany
Tel:+49 6151 33264. Fax:+49 6151 311076.
e.mail: zellcheming@zellcheming.de
Year and Place of Foundation: 1905 Berlin
Chairman: Claus M. Palm
Executive Director: Wilhelm Busse

Great Britain
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Paper Industry Technical Association
5 Frecheville Court, Bury, Lancashire BL9 0UF
Tel: +44-161-764-5858. Fax: +44-161-764-5353.
e.mail:info@pita.co.uk
website: www.pita.co.uk
Year of Foundation: 1920
Chairman: Tim Klemz *Chief Executive:* Barry Read

Hungary
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Technical Association of the Paper and Printing Industry
1371 Budapest, Fö-u-68, Hungary
Tel: +36-1-201-8495. Fax: +36-1-202-0256.
e.mail: mail.pnyme@mtesz.hu
Year and Place of Foundation: 1948, Budapest
Chairman: G. Kardos *General Secretary:* S. Pesti
President: Andrew Fabian

Italy
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The Technical Association of the Italian Pulp and Paper Industry
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e.mail: aticelca@iol.it
Year of Foundation: 1967
Chairman: Alessandra Bogliano
General Secretary: Massimo Ramunni

Latvia
LPRA
Latvian Paper Makers Association
Pilsonu iela 1, Ligatne LV-4110, Latvia
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e.mail: Ligatne.pap@apollo.lv or treiman@edi.lv
President: Guntis Pirags *Eucepa Representative:* Arnis Treimanis

Norway
PTF
The Technical Association of the Norwegian Pulp and Paper Industry
P.O. Box 7072, Majorstua, N0-0306 Oslo, Norway.
Tel: +47-23-08-88-74. Fax: +47-23-08-88-38.
e.mail: kari.bakken.ptf@norskindustri.no
Year of Foundation: 1914
President: tba *General Secretary:* Ole Sommerfelt

Poland
SPP
Technical Association of the Polish Paper Industry
Plac Komuny Paryskiej 5A, PL -90 950 Lodz,
PO Box 200, Poland.
Tel: +48-42-630-0117. Fax: +48-42-632-4365.
e.mail: info@spp.pl
Year of Foundation: 1946
Chairman: M. Jarczynski *General Director:* Z. Fornalski

Portugal
TECNICELPA
The Portuguese Association of Pulp and Paper Technicians
Head Office: Rua Amorim Rosa 38-1° Dt.° 2300-450 Tomar, Portugal
Tel: +351-249-324-858. Fax: +351-249-312-068.
e.mail: info@tecnicelpa.com
Year and Place of Foundation: 1981, Tomar
Chairman: João José de Sá Nogueira
General Secretary: Augusto Góis
President: João Luis de Pinho Ferreira

Slovenia
DITP
Association of Pulp and Paper Engineers and Technicians of Slovenia
SI-1000 Ljubljana, Bogisiceva 8, Slovenia
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e.mail: ditp@icp-lj.si
Year and Place of Foundation: 1970, Ljubljana
Chairman: Marko Jagodič *Secretary:* Alenka Ivanus

Spain
IPE
The Technical Association of the Spanish Paper Industry
Avenida de Baviera, Isbajo 28028 Madrid, Spain
Tel: +34-91-576-30-03. Fax: +34-91-577-47-10.
e.mail: ipe@ipe.es
Year of Foundation: 1963
Chairman: M. A. Medeiro *General Secretary:* Carlos Reinoso

Sweden
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The Swedish Association of Pulp and Paper Engineers
SPCI Secretariat, Box 5515, S-11485, Stockholm, Sweden
Tel: +46-8-783-8486. Fax: +46-8-661-7344.
e.mail: marina.asp@spci.se
Year of Foundation: 1908
Chairman: Sven Wird *Executive Director:* Marina Asp

World Paper Industry Technical Associations

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President: P. Espinosa

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Chairman: André Bernier

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e.mail: info@japantappi.org
President: Naboru Hasegawa
Executive Director: K. Toyofuku

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TAPPI
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President: Larry Montague
Chairman: Jeffrey J. Siegel

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