PITA ANNUAL REVIEW

2014-2015

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

PITA Membership Benefits

The **Paper Industry Technical Association** (**PITA**) is an independent organisation which operates for the general benefit of its members – both individual and corporate – in promoting and communicating the technological aspects of paper manufacture. Formed in 1960, it has served the Industry – both manufacturers and allied trades – for over half a century.

Individual Membership Benefits include:

- The following publications, which are distributed free to all **PITA** members:
  - » ***Paper Technology*** - a prestigious international technical journal (5 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);
  - » ***PITA Affairs*** e-newsletter - containing time-sensitive information (at least 6 issues pa).
- Preferential access to **PITA** Technical Meetings and events.
- Advantageous arrangements for all Training Seminars organised by **PITA**.

Corporate Membership Benefits include:

- Promotional opportunities via:
  - » Feature articles or advertorial copy in ***Paper Technology*** and the ***PITA Annual Review***;
  - » Targeted exposure (with optional Logo upgrade) in the ***PITA Annual Review***;
  - » Promotion and links from the **PITA** Website, via emails and in our directories;
  - » First refusal on any advertising opportunities that may arise at **PITA** meetings;
- Preferential discounted rates:
  - » On Exhibition Spaces at **PITA** Events;
  - » For Advertising in **PITA** Publications;
  - » For all employees attending **PITA** Workshops, Seminars & Training Courses;
  - » Complimentary Student Membership for any trainees.*
- Access to the '**PITA Links**' recruitment service.
- The option of booking meeting rooms in the **PITA Office**.
- Opportunities to identify and work with industry partners on **PITA** led projects.

PITA Corporate Members receive regular copies of ***Paper Technology***, the ***PITA Annual Review*** and ***PITA Affairs*** e-newsletter; these reach over 1,000 members and 2,000 contacts within the UK, European and Global Paper & Forest Products Sector.

* *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.*

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Compiled by the PITA Office

PITA
Paper Industry Technical Association

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Paper Industry Technical Association

Annual Review 2014-2015

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Chairman's Message

A New Year always bring about a time of reflection for the year just gone and for what might be in the coming year. Such considerations are not just restricted to individuals but equally apply to institutions and organisations like PITA. Arguably PITA is ahead of the game in that consideration for how PITA should evolve going forward has been part of on-going project by the management team throughout 2014 as discussed elsewhere.

What is clear is PITA will have to continue to evolve to reflect changes in the industry at large; in the workplace; in the way and manner people communicate; and to reflect the developing needs of the Membership.

The Membership is why we exist and ultimately how we survive and prosper as an association. Feedback is important on what we are already delivering and what we should consider delivering in the future. As some of you will be aware we have recently completed a survey across the Membership as part of the Development Forum referred to earlier. For those members who participated, thank you, and for those who were not contacted directly, please feel free to provide feedback at any time.

The survey output will be used as part of our initiative to continue to develop and refine PITA and its offerings to the evolving needs of the Membership and the industry. With that in mind, 2015 will see the continued evolution of the training programme addressing a range of subjects, and the hosting/co-hosting of events that address topics of importance to the UK industry at large e.g. the BAT Workshop held on 29th January.

As we go forward, expect to see more digitally-based communications as a means of providing a regular communication vehicle to the Membership. Paper-based communication will still have its place and will be used to reinforce key messages and to address specific issues.

Furthering the use of more web-based/video communication may be a route forward to restoring working group/technical discussions among Members. It is clear that prevailing time pressures and travel considerations have been major inhibitory factors to prevent an increasingly widespread Membership base to meet easily. However, feedback suggests there is still a need and perhaps such technology may be the enabler to make it happen.

Such an idea will be reviewed along with others as we go forward, but input and views from the Membership are always welcomed.

But what of the overall industry going forward? Here is this old Moore's Almanac view for 2015 and beyond!

- Graphical papers will continue to decline and while the rate of decline has slowed, the overall downward trend will persist.
- For newsprint, the decline is even more closely associated with technology substitution. Although the overall decline is a global trend there are regional differences. However with news being delivered predominately on-line or via mobile devices, the long term prognosis is not good. Key to the ultimate lifespan will be the behaviour of advertisers.
- While technology substitution is driving down demand in the graphics sector, it is also providing opportunity in niche areas. For example, paper is providing tangible products from new on-line businesses e.g. Felt (an iPad app for greetings cards – see http://www.feltapp.com/), Minted (luxury stationery – see http://www.minted.com/) that require high end printing & writing papers to realise customer offering.
- Interestingly there is also some technology 'backlash' that will maintain the paper product as a communication vehicle:
  - Ebook sales are peaking – hardcover book sales increasing (www.wsj.com/articles/ SB10001424127887323874204578219563353697002).
  - Younger generation going back to paper books (www.theguardian.com/childrens-books-site/2014/dec/16/teens-ebooks-ereaders-survey)

  Such events are clearly not going to reverse the overall situation but they do illustrate that the printed word on paper is not going to disappear completely.
- In contrast to paper for graphic applications, paper for packaging applications is experiencing continuing demand. Demand is being driven by economic revival in a number of markets, but also importantly by paper's 'green' credentials.
- Consumers are now more aware and more demanding in terms of packaging's characteristics and credentials in terms of environmental considerations than at any time in the recent past. This has led to new product offerings, for example, bags and sacks and products for a variety of retail/consumer applications. It has also been instrumental in the initiation of a number of research projects examining sustainable and bio-based barrier coating systems e.g. Bioboard; RenewFuncBarr; Plant-Pack.
- However, for paper-based packaging to progress further there needs to be improvement in the paper's functionality as a packaging substrate, particularly for barrier properties.

The impacts of technology, of environmental factors and of economic considerations will continue to shape the industry going forward. There are threats to the industry and there is likely to be further rationalisation going forward, but equally and perhaps more importantly there are opportunities which will ensure the industry survives.

Graham Moore

Outgoing Chairman's Message

(Given at the PITA AGM, SAICA Partington, 4 July 2014)

Firstly I would like to welcome you to the PITA AGM. I am delighted to see so many of you have taken the time and trouble just to attend; we have all known for many years that the best way to get PITA members together is to offer a quality visit. The visit we have today is one for which we have been striving for some time; indeed, it and has been an obvious target since the first reel was produced. I would like to thank SAICA for their hospitality today in welcoming PITA to this world class facility; also, I welcome their operations to the UK on behalf of PITA. Additionally, from a personal perspective, SAICA have been a pleasure to work with, both here and in Europe.

We are constantly looking for quality visits for our members and with so many mill managers here today, don't be shy in volunteering your site!

Traditionally, the Chairman's address begins with a brief summary of how the Paper Industry is performing in the world. This year is little different from most recent years ... the Paper Industry and its allied industries face many challenges in order to secure our future prosperity, as indeed does manufacturing as the whole. Few of these challenges we face are particularly new ones that we have not seen before. Trading is still tough, and yet globally, paper manufacture increases in volume – we are all part of an expanding, global business.

And now To PITA

PITA exists to assist and support its members, both individual and corporate. The full scope of this is not really defined and is always subject to continual change, though traditionally it has been through meeting and discussion groups and information sharing, and indeed days like today.

Training has always been a part of what PITA has coordinated and this has been stepped up in recent years after members highlighted a lack of relevant quality training available to our UK mills. PITA responded, and I am proud to say has been instrumental in helping to revitalise the training and education offered in the UK – a fact reinforced by our receipt of enquiries from Europe and further afield regarding the courses we have helped introduce.

In the PITA Development Forum we have begun to take a radical look at what PITA is about – identifying how we can reshape, change and adapt for the future. If you like we have begun to reassess the very purpose of PITA. We are looking at, amongst others, expanding membership, *Paper Technology*, our corporate offering and best practice, all of which will be reported on separately today. As always we welcome your input. Feel free to contact the PITA office team or any board member with any thoughts and ideas you may have. Get Involved. Change won't come about overnight but it has already begun.

On the financial front we have reported another strong performance with a modest surplus. Many similar organisations to ourselves face the same issues worldwide, and we are faring better than most. However, although we recognise that we have seen a significant turnaround from the deficits of previous years, we know there is still more work to be done. The Association's finances have been our number one objective, because if we had continued along the trajectory established in the mid-2000s then the Association's future would be limited at best – indeed, we probably would not be here now. However, we will not take our eye off the ball. We will continue to seek new areas and activities in which PITA can progress and any such welcome surpluses will enable us to re-invest in the future of the Association.

As I near the end of my speech, I would like to thank Barry, Helen and Daven for their containing hard work in transforming PITA. Finally, I must thank you all for allowing me to serve as your National Chairman; it has been a pleasure and a privilege.

Martin Wroe

PITA Board

2014-2015

Graham Moore	*National Chairman*
John Kirby	*Deputy Chairman*
Martin Wroe	*Immediate Past Chairman*
Stephen Hutt	*Financial Director*
Helen Dolan	*Company Secretary*
Tim Klemz	
Kieran Rafferty	

2013-2014

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

2012-2013

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

PITA Office/Paper Technology

Barry Read
Chief Executive
PITA Office

Helen Dolan
Company Secretary
PITA Office

Daven Chamberlain
Editor
Paper Technology

Graham Sutton
Advertising Manager
Paper Technology

Review of the year

Hawkins Wright Symposium 2014

Daven Chamberlain
Editor, Paper Technology

This year's annual event took in yet another new London venue – the Royal College of Surgeons, behind Lincoln's Inn Fields. The lecture theatre seemed more crowded than usual, which is not surprising given the record attendance by over 320 registered delegates. We were all asked to take our seats in plenty of time, and to move up and not leave empty spaces – manoeuvring this number of people in a reasonable amount of time takes some doing! Fortunately, the **Hawkins Wright** team, ably assisted by Amanda Marcus Carr and Jonathan Roberts of **Pryor Roberts Communications** are old hands at the meeting, greeting and shepherding, so we started almost on the button.

Large gatherings of senior folk from the pulp, paper and forest products sectors from around the world (I counted 29 countries represented) invariably attracts suppliers, and once again the event was sponsored by an expanding number of international companies. The vast majority of those who sponsored last year's event returned, and a few new partners were added to the list, which reads as follows: **AkzoNobel** (sponsors of the lunch); **Altri**; **April**; **Canfor**; **Cenibra**; **CMPC**; **Ence**; **Fibria**; **FMS**; **Gearbulk**; **Mercer Pulp**; **Metsä**; **Norexeco**; **Omya**; **Södra**; **Stora Enso**; **UPM**; and **Valmet**. (It is interesting to note the pulp manufacturers listed here represent in excess of 20Mtpy of market pulp, which alone amounts to over a third of the world market.)

Andrea Boltho (Oxford University)

Anyone who considers economics a dull subject should come to a lecture by Professor Boltho. He last appeared at the 2012 Symposium, when he was careful not to make any predictions about how the world economic situation would pan-out, although he did suggest that if the Eurozone continued in its sluggish recovery there might be divergence between Northern and Southern Europe, with the latter breaking away to leave the former as a more restricted Eurozone. Of course, to date no such break-up has occurred…yet.

This year the world economic outlook can be summarised in three bullet points:

- China is slowing down (but still growing)
- USA and UK are doing reasonably well
- Eurozone is an unknown quantity

Overall, for once the UK is on the right side of the economic wheel, but in global markets it is not just about 'you', but also your main trading partners. The Eurozone is a major market for UK producers, which means we will never fully be on the road to recovery until they show signs of growth, and for such a diverse range of economies, that will be some time to come. Furthermore, there are four clouds on the horizon:

- Russia-Ukraine
- Rising US interest rates
- The risk of deflation
- The burden of private and public debt

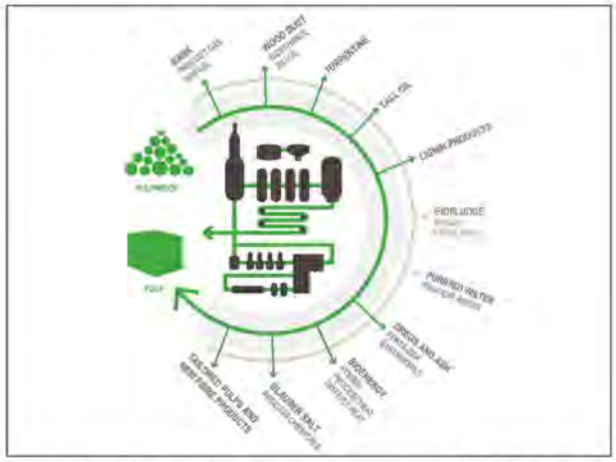
For the first of these, Russia is already suffering due to sanctions, but the effect on Europe is unlikely to be major as long as Russia does not target energy exports. Regarding US rates, these are expected to rise following positive growth in US output, employment and prices, and reflect a strengthening economy; yet even mild pronouncements from US policy makers about possible changes to Quantitative Easing have caused major shocks – showing the 'recovery' is at best fragile. Deflation is a very serious possibility, because as prices fall the inevitable consequence is people put off purchases, leading to a self-fulfilling prophecy. Finally, for the problem of debt, this is never easy to solve, and can take years to change – however, when austerity is used as a tool, the real value of debt tends to increase, leading some governments to increase austerity further…so they get into a vicious circle (witness Greece).

Niklas Von Weymarn (Metsä Fibre)

Metsä Fibre produces almost 2.5Mtpy of chemical pulp, in four mills in Finland: Äänekoski (530,000 tonnes); Joutseno (690,000 tonnes); Kemi (590,000 tonnes); and Rauma (650,000 tonnes). Äänekoski is the oldest (circa 1985), and is starting to require reinvestment; but with all the global changes in pulp production, why invest in Finland?

Globally, Metsä Fibre anticipate growth in softwood demand, amounting to around 9% by 2017 (relative to 2011) – so, while all the major headline-grabbing new pulp mills are based around hardwood in Latin America or Asia, softwood is still a good product. Secondly, Finland as a whole is confident in the need to maintain a strong, sustainable wood industry in the country; forest growth is continuing to increase and there is an excess of wood available. Finally, the need to re-equip Äänekoski offers the chance to develop a new strategy.

The result is Metsä Fibre are planning to enlarge Äänekoski and transform it to a Bio-product Mill, where pulp, energy and other, unusual bio-chemicals, are output, as shown in the graphic. The basis of the mill conversion is that the bio-economy, something 'futurists' have been prophesying for several years, will become a reality in the not too distant future – certainly within the lifetime of the plant, slated at around 40-50 years. The concept is still based upon pulp, which is the current main product, but different outputs are anticipated to form the basis of a new bio-economy, where fractions that are currently available but not used efficiency are utilised to form new value chains.

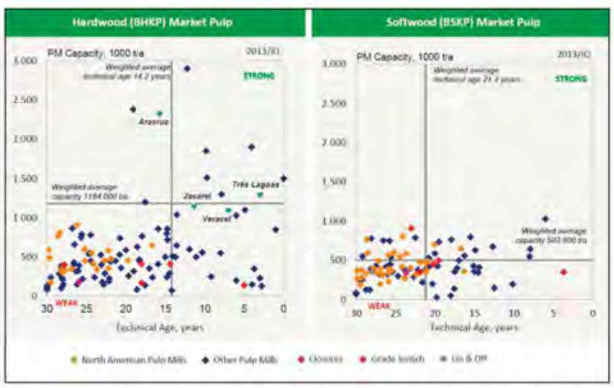


Bio-product outputs from a modern, energy-efficient pulp mill

Marcelo Castelli (Fibria)

We are living through a period of great structural change: in Mature Markets (Western Europe, USA) graphical papers are experiencing a sunset, but with the lower availability of quality recovered fibre, the pull for market pulp is positive; likewise, in Emerging Markets, there is continuing growth in Tissue, Packaging, Specialities, and even Graphical products. So overall the Fibria message regarding market pulp is that demand is not an issue; supply is an issue, so pulp manufacture is still an excellent business in which to be.

Unusually, whereas the Paper Industry has undergone considerable consolidation during the last couple of decades, the Pulp Sector remains doggedly fragmented. Furthermore, margins in pulp continue to decline as new, large projects come online, which result in occasional closures of older capacity (none of which are ever mooted prior to the event). In this new dynamic market, very few pulp suppliers are global; most are regional; and very few are local – these latter producers are the most likely to close, at least in the short term. Also, many pulp plants throughout the world are now old, small and outdated; the graphic shows technical age against capacity, and indicates a high proportion of the most outdated are found in North America. The most outdated will generally have the highest operating costs, leading to an obvious consequence as new competition is introduced.

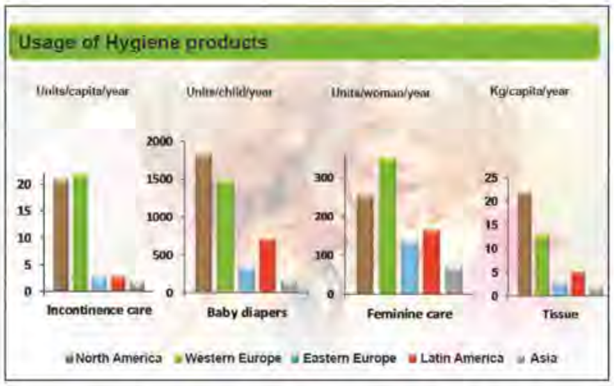


Technical age and scale in the market pulp industry (sources Pöyry, PPPC and Fibria)

As regards the future, Fibria has been forecasting how the pulp industry of the future will differ from that of today. Like Metsä Fibre, they are looking at how best to maximise what they extract from forests, so in addition to pulp manufacture they are researching: pyrolysis; gasification; palletisation; cellulosic ethanol; bio-chemicals; bio-polymers; Lignoboost; and carbon fibre production – either in-house, or in collaboration with external partners.

Brian Dillon (SCA Hygiene)

Turning now to the tissue and hygiene sector, the speaker gave an overview of how this has changed over the last decade, and the implications for other segments of the Paper Industry. SCA is the world's leading tissue manufacturer, and in 2014 accounted for some 10% of the world capacity (or 32% of the European capacity). Despite having undergone significant consolidation over the last twenty years, the market has continued to grow substantially – in Europe alone from 5Mtpy in 1997 to 7.7Mtpy in 2014. This world growth is on the back of massed urbanisation throughout the developing world, major population growth and the significant demographic changes in the developed world, where the population is ageing.



Usage of hygiene products in five major regions of the world

Hygiene products in particular are set to burgeon, with high growth potential anticipated in markets where there is currently low penetration of products – such as Eastern Europe, Latin America and Asia. Fluff pulp capacity is likely to grow, and although the global market for tissue (currently 32Mtpy) is split 50:50 between recycled and virgin fibre, future growth will depend upon access to suitable quality pulps. To this end, the downturn in Printing and Writing (P&W) grades is having a very marked effect, as, traditionally, tissue was a major end use for recovered P&W papers. Now there is less and less recovered fibre of high enough quality, so analysts predict growth in virgin pulp for tissue at the expense of recycled grades. Indeed, 2013 was the first year in which P&W and tissue both used equivalent tonnages of chemical market pulp (16.3Mt each). PPPC predicts global P&W demand will drop by a further 4Mt by 2018, which should free up around 2Mt of market pulp. So, SCA forecast world growth of 8.5Mt of tissue by 2018, compared to 2013, of which only 1Mt is likely to be based upon recovered paper, and of the 7.5Mt of chemical pulp needed, 6Mt is likely to be hardwood. Using these figures, SCA would be disinclined to invest in new deinking capacity, on the basis they cannot predict what the recovered fibre market would look like 30 years hence, this being the anticipated lifetime of the plant.

Tom Wright (Hawkins Wright)

Over the last year the price of softwood and hardwood has diverged (mainly from July 2014), such that the differential is now at a record high. This has been caused by several converging factors. On the supply side, availability of softwood has been reduced due to shutdowns (Tofte), accidents (the boiler explosion in Pols), the slow ramp-up of new facilities (Bratsk) and the ageing asset base generally. There are also supply issues on the hardwood front – Maranhao and Montes del Plata both came online within six months, and there is evidence to suggest the market was anticipating more hardwood availability from these than actually transpired; however, it can take 18 months or so for the full effect of a new mill to be realised in the market. Also, some older mills (Huelva and Old Town) closed. Meanwhile, some of the divergence is just down to restoration of the *status quo*, with softwood naturally assuming the higher price – the two pulp sector have very different cost structures and when they reached cost parity in late 2012, it was obvious this could not last. Finally, currency is an issue; currencies in major hardwood regions have devalued, relative to those of Northern softwood producers, with the result softwood prices have appreciated in relative terms.

Turning to China, even though growth has slowed, it is still the most important market for market pulp. Hawkins Wright figures are shown in the bar chart; these indicate some recent growth, but overall the figures are way below those released officially (represented by the line). Chinese paper production growth has definitely slowed, but imports of market pulp are still supported by the burgeoning Tissue sector, by the quality upgrade whereby 'New China' is replacing the 'Old China' mills (many of which were closed last year), and there has also been a marked slow-down in home production of pulp. Overall, China will remain very price-sensitive, because they have significant over-capacity in all but newsprint, meaning utilisation rates are rather low – it is estimated catch-up could take 5-6 years.

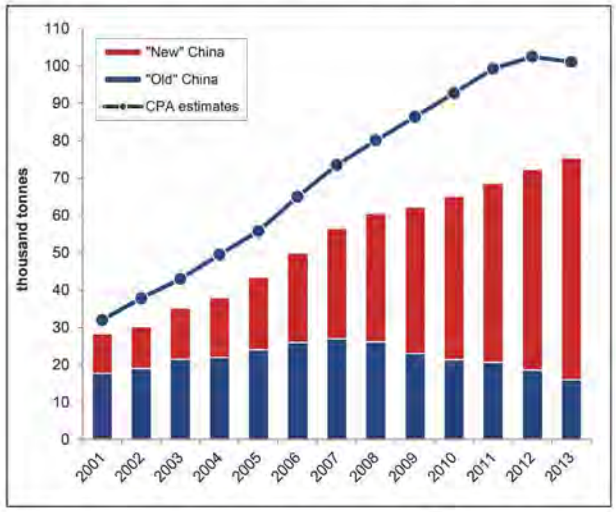
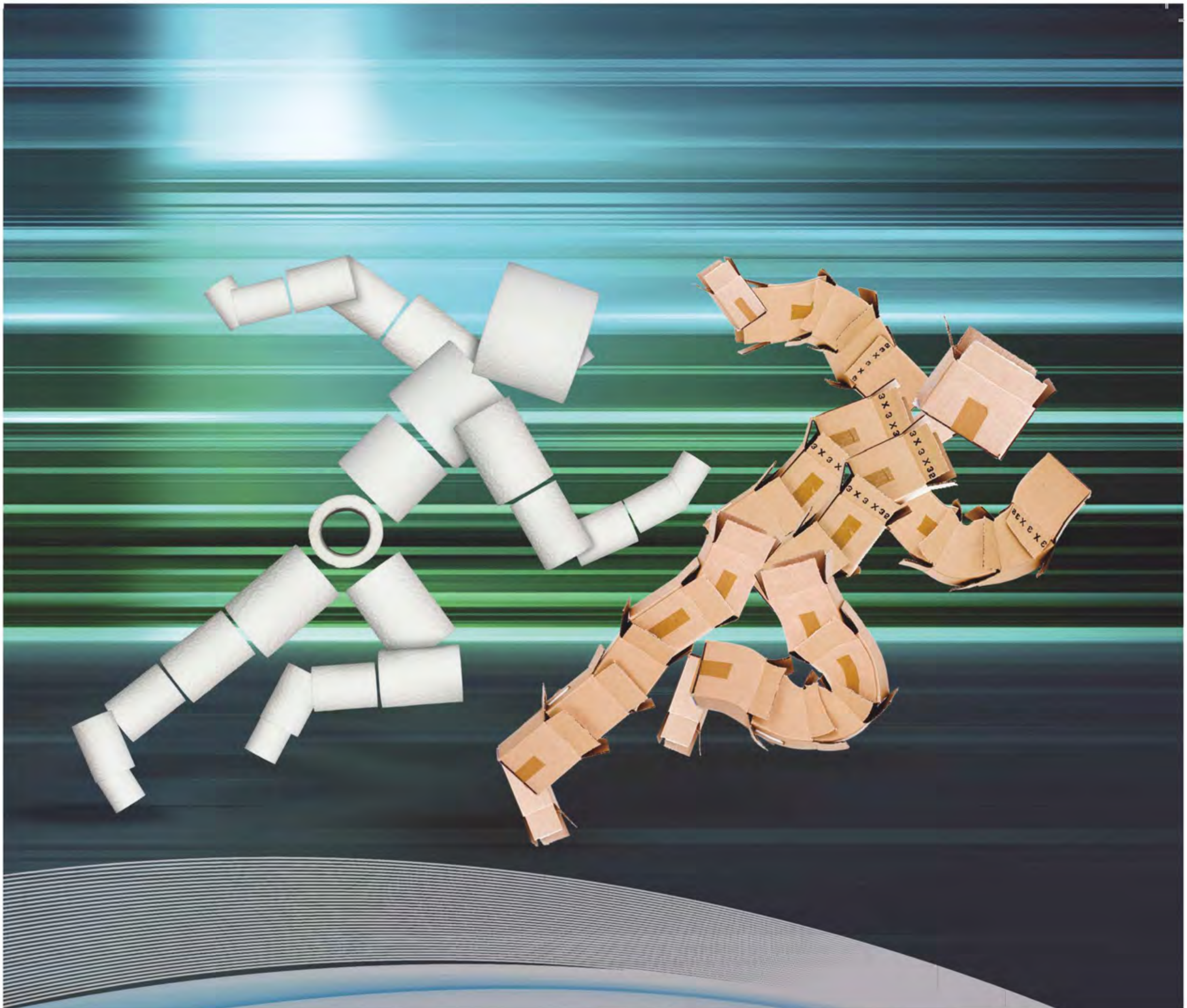


Chart showing Hawkins Wright estimate of Chinese paper and board production figures

Finally, to the market pulp projection for the coming year. Pulp demand has been growing steadily at around 1.2Mt/a for the last two decades, but in recent years has slowed to nearer 0.9Mt/a. Between 2003 and 2013, China accounted for 87% of this growth. The country is expected to continue supporting growth, but at what price given the over-capacity issues? Meanwhile, projected market pulp capacity for the coming few years suggests a net additional capacity of 1.4Mt/a, mostly Latin American hardwood kraft. Hawkins Wright predict further growth in the market will continue, but that it will be combined with closure of some older, less efficient pulp mills is inevitable. The big unknowns are who, and where? Currency is likely to have a major effect, as movements affect competitiveness. However, in the last five years large numbers of mills have closed or converted away from paper pulp; these have been all over the world, both Northern and Southern hemisphere, hardwood and softwood, so experience shows it is just not possible to predict exactly which mills are likely to close; announcements are seldom made in advance! The outlook therefore remains guarded, but positive, with growth anticipated to continue.



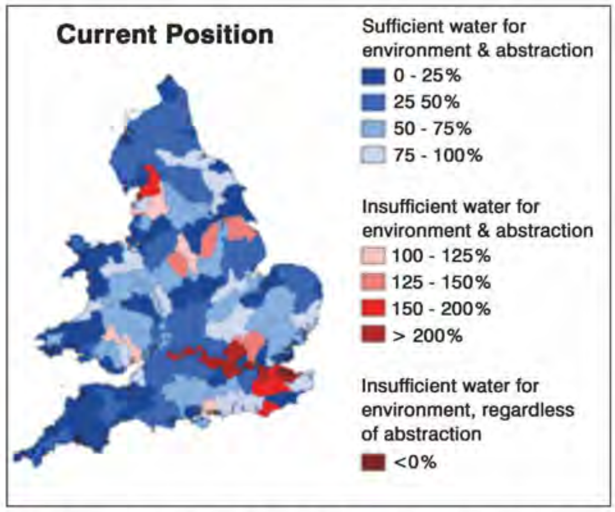
Environment Review: Key Challenges for 2015

by Debbie Stringer
Environment Manager,
CPI

cpi confederation of paper industries

With the long awaited Pulp & Paper BREF – *BAT (Best Available Techniques) Reference Document* – finally published and the BAT Conclusions taking legal status on 30 September 2014, the focus now turns closer to home. The UK Regulators are the Environment Agency (EA) in England, Natural Resources Wales (NRW) in Wales and the Scottish Environment Protection Agency (SEPA) in Scotland. They are now obliged to ensure all paper mills, with a production capacity over 20 tonnes per day, are operating to BAT and working within the associated emission levels (*BAT AELs*) within four years i.e. by 30 September 2018.

The challenge, moving into 2015, is that all relevant mill permits must be revised to take account of the BREF and specifically the Best Available Techniques as defined in the BAT Conclusions and associated emission levels. The first step in this process is the Regulator gathering information on the 'BAT status' of mills. All mills are being asked to confirm whether they are working to each applicable BAT Conclusion either now or will be by 2018, with the same question



asked about meeting the BAT AELs and associated emission levels. Although, the only applicable BAT AELs are wastewater discharge for those discharging direct to watercourses. It is not just a case of ticking a box; evidence is required to back up assertions. The quantity and quality of such evidence is potentially very subjective, with the Regulator as the arbiter.

The Confederation of Paper Industries (CPI) and PITA continue to work closely to assist members through the permit review process. A joint workshop is planned for January 2015 to bring Mill representatives together with the Regulator to discuss the evidence required and make connections with potential service providers to assist with developing plans to meet the 2018 deadline.

Once the Regulator has all the information to determine who is already working to which BAT, and who needs a plan to get there, they will look to issue revised permits with permit conditions to achieve full compliance with BAT by 2018. The ongoing support from both CPI and PITA will be there to aid mills through this process – generically for sector wide issues and consistency, and also individually should specific mills issues arise.

CPI understands that the target is for the majority of UK Paper Mill permits to be revised by the end of 2015. It may not have escaped your notice that this is well ahead of the 2018 BAT compliance deadline. Those mills that are part of a group with sister mills elsewhere in Europe may find themselves well ahead in the process of having permits geared to meeting the BREF requirements.

There is method in the madness though. If we can successfully complete the permit reviews with considered plans and reasonable permit conditions, then the move towards working to BAT should be more straightforward with no last minute panics. In particular, there is an opportunity to comply not only through technology but also through procedures and management systems – hence a very important challenge for 2015!

2015 also has another important development on the horizon, namely the developing legislation for reforming the freshwater abstraction regime. Although not expected to come into force until 2020, the legislation for Abstraction Reform is to be finalised in 2015, including the mechanism for transitioning existing abstraction licences to the licences within the new regime. Applicable to all mills currently abstracting freshwater from surface water or groundwater, the aim of a reformed regime is to tie abstraction limits to water availability. The options being considered are based on a variable limit depending on water available in a catchment, or a variable share of the water available in a catchment, with the absolute values going up or down depending on water levels in the area assessed over a given frequency (yet to be determined). Given the inherent complexity of any such scheme, it is likely to be implemented on a catchment basis in order of priority; potentially only implemented in catchments where water scarcity is already, or is becoming, a significant issue. The timing and extent of the impact of a reformed regime will vary with the degree of water stress in your catchment.

Of more immediate impact will be the transition of abstraction licences into the new scheme which could begin once legislation is passed and will impact all current abstractors. A large number of licences (across all sectors) have substantial 'headroom' with actual abstractions well under their limits. Licences will be transitioned into the new regime on the basis of quantities currently abstracted, not existing limits. This is a challenge in itself. How do you determine a simple formula to apply across variable sectors, from energy through manufacturing to quarries, sports facilities, agriculture and trout farms?

Access to water is a valuable asset with each user wanting to hang on to what they have, particularly if the mechanism to increase abstraction limits for expansion is unclear. CPI continues to work closely with Defra on Abstraction Reform through participation in the stakeholder group Abstraction Reform Advisory Group (ARAG).

Energy Review

by Steve Freeman

Director of Environmental & Energy Affairs,
CPI

The difficulties inherent in (successfully!) forecasting energy prices were well illustrated during 2014 – as well as needing an encyclopaedic knowledge of the economic working of energy markets, it turns out that understanding politics is equally important. Turmoil in the Middle East is normally a safe bet for higher oil prices, yet market prices tumbled throughout the year as the major oil producers drove down prices to settle political scores. In the UK, the distribution companies declined to reduce electricity prices on the basis that a Labour Government would stop them going back up.

For energy prices here in the UK, generally benign wholesale prices resulted in energy-cost falling from the top of the political agenda. However, distribution and transmission costs continued to escalate, especially in the electricity market where major investment is needed to reshape and renew the network to cater for the new generation mix.

For grid electricity, the proportion of renewables on the bars continued to increase – on some days, wind power supplied almost 20% of the UK's electrical energy. Of course, on a still day this can drop to zero, highlighting the need for back-up power to smooth intermittent renewables, with Ofgem raising concerns that the generation margin is uncomfortably tight for this winter and even tighter for next. A number of older coal plants not capable of meeting tighter emission limits (required by the Large Combustion Plant Directive and the provisions of the Industrial Emissions Directive) are closing which will reduce the margin even further. One response is the development of demand and peak supply management policies linked to the Electricity Market Reform – an opportunity for those able to take part, but an increasing cost for those on the receiving end of the bills. The guarantee to EDF of a strike price for new nuclear electricity close to double the market price shows the pressing need to renew the base generation currently supplied by coal and ageing nuclear plants. The option of new coal being ruled out by UK carbon polices that require the electricity supply to be effectively decarbonised in the longer term.

For gas, the jury remains out on the potential of fracking to contribute to gas security. On one side, the Chancellor established a more favourable regulatory regime to encourage UK exploration while, on the other, there was little sign that local opposition to actual drilling will fade away. However, what is clear is that North American based competitors continue to enjoy a substantial competitive advantage thanks to cheap fracked oil and gas.

For DECC, lower prices for conventional fossil fuels (oil, gas and coal) have an uncomfortable side effect. Much of the justification for expensive renewable electricity is based on an expectation that fossil fuels will increase in cost over time – so resulting in renewables becoming cost competitive and thus allowing subsidies to fall. This 'definite pain now, possible benefit later' policy was criticised extensively at the time; even DECC has now revised downwards its longer-term cost expectations for UK fossil energy prices. This means that the total cost of renewable subsidies for a defined percentage of renewable penetration will increase over and above DECC's original forecasts.

The net result of these UK policies, especially in the context of the newly agreed EU 2030 energy and carbon targets, means there can be little doubt that energy costs will continue to be pushed upwards by regulatory costs irrespective of the underlying cost of the basic energy. On the positive side, there is now strong support from BIS for Energy Intensive Industries to receive compensation to offset these increasing costs, though they must comply with State Aid rules. BIS has already delivered well over £10m in compensation to offset the cost of the Carbon Price Floor, with additional policies being developed to offset the cost impact of the Renewable Obligation and forthcoming Contracts for Difference.

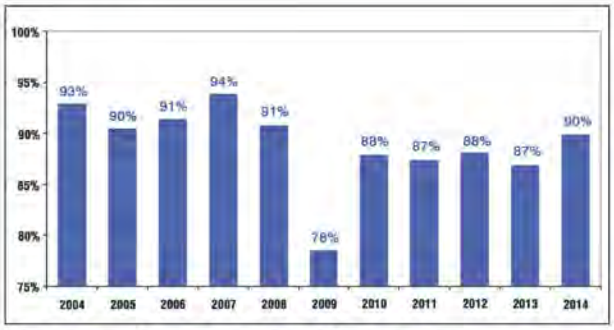
Of course energy efficiency must remain a priority for the industry. The Climate Change Agreement's (CCA) first target period ends on 31 December and the sector's performance figures suggest it will beat its CCA energy efficiency target by a small margin. This is good news and indicates the sector is continuing to invest in efficiency projects. Decarbonisation goes hand-in-hand with energy efficiency, though biomass can confuse the issue (being low carbon but generally less energy dense so incurring an efficiency penalty).

The Confederation of Paper Industries (CPI) and PITA continue to work closely with DECC and BIS to identify policy measures required to enable paper mills to continue to decarbonise and remain internationally competitive. We look forward to developing these ideas over the next few months.

West European Coated Paper Review

by Gary Thomson, *Senior Market Consultant,* EMGE & Co Ltd

Growth over?



W. European Operating Rates – Coated Papers

The last year has been a rather unusual time for the European Coated Paper market, in a post-Credit Crunch context. Following strong, sometimes double-digit, demand growth in the 1980s and 1990s, coated paper usage has diminished in magazines, paper catalogues, direct mail, corporate communications and the like.

With few exceptions, Western European demand for Coated Papers has been in long-term decline, due to reductions in paper readership, advertising and print, while at the same time, digital media have been expanding rapidly. Where once we used printed documents to get most of our information and keep it, we now increasingly (or in some cases almost completely) read on LCD and other electronic display devices, such as PCs, Smartphones, Tablets and e-Books. Print is still in use widely, but instead of referencing information largely in a printed form, we now primarily use the Internet and the Cloud for e-mails, pdfs or other digital documents and we get our entertainment increasingly online via portable digital devices and gaming consoles.

In terms of Coated Paper demand, the result is that volumes have fallen dramatically. By the end of 2013, Western European demand for Coated Papers was down by more than 30% compared with 2007.

In stark contrast, during the past 12 to 18 months, we have seen these severe negative trends lessen and the Coated Paper market has declined much less severely. From mid-2013 and during the first half of 2014, Western European demand for Coated Papers eased considerably and, during 2014, Coated Paper demand is expected to fall by around 2%.

Exports of Coated Paper to markets outside Western Europe have declined faster and imports into Europe, from Asia, North America etc have not been a significant factor.

Sales from Western European paper mills are estimated to be falling by around -4% in 2014 in volume terms, which is much less severe than previous years.

However, while the rates of decline improved, actual volumes of paper in absolute terms were nothing special. Indeed, Western European Coated Paper demand is still a long way below levels seen just a few years back.

Capacity Crunch

In response to generally falling Western European demand for Coated Papers, manufacturers in the region have reacted by reducing their capacity, to prevent oversupply from getting out of control.

In the Coated Woodfree sector, papermakers closed or converted 5 paper machines in 2013, reducing capacity by almost 500,000 tpy. In 2014, another 4 machines were taken out of the coated market, cutting capacity by almost another 500,000 tpy – this could reach over 600,000 tpy in 2014, depending on the fate of yet another mill in France, which is slated for sale or closure.

In Coated Mechanicals, capacity cutbacks affected 3 machines in 2013 reducing capacity by more than half a million tpy, and in 2014, a further 3 machines have been taken out of this sector, amounting to a further capacity reduction of almost 600,000 tpy.

In total, then, Western European Coated Paper producers have cut their capacity by a total of 2.5 million tpy this year and last, affecting a total of 17/18 paper machines in just two years (see table).

So is the capacity management having the intended effect, to reduce and eliminate oversupply?

The chart shows that capacity utilisation ratios (the ratio of market sales to industry capacity) across the Western European Coated sector fell dramatically in 2009 and have remained below 90% for several years since. However, following over-supply levels of 87%/88% between 2010 and 2013, capacity utilisation ratios are estimated to have improved to 90% in 2014, despite demand declines, due to the capacity reductions that have taken place. This still indicates oversupply, but less so.

Therefore, the answer to the question above is both Yes and No; capacity management has indeed helped to reduce oversupply, but it has generally not been enough to eliminate it.

COATED PAPER CAPACITY CLOSURES/CONVERSIONS W. Europe

Country	Company	Mill	Year
COATED WOODFREE			
France	Lecta	Condat	2013
Germany	Sappi	Alfeld	2013
Italy	Burgo	Avezzano	2013
Sweden	Arctic Paper	Grycksbo	2013
Sweden	Metsa	Husum	2013-14
France	Arjowiggins	Wizernes	2014
Germany	Scheufelen	Oberlenningen	2014
Netherlands	Sappi	Nijmegen	2014
Spain	Lecta	Torraspapel	2014
CWF CLOSURES			**-1.1 Million Tonnes**
COATED MECHANICAL			
France	UPM	Stracel	2013
Germany	Norske Skog	Walsum	2013
Finland	Stora Enso	Veitsiluoto	2014
France	Stora Enso	Corbehem	2014
Sweden	Metsa	Husum	2014
Finland	UPM	Kaukas	2015
Sweden	SCA	Ortviken	2013-15
Sweden	Metsa	Husum	2015-18
CM CLOSURES			**-1.4 Million Tonnes**
CLOSURES – COATED PAPERS TOTAL			**-2.5 Million Tonnes**

European Containerboard and Corrugated Board Review

Outi Juntti,
Senior Principal,
Pöyry Management Consulting Oy

Growth continues, but the road is bumpy

In 2014 European economic development was still shadowed by several factors - high public-debt-to-GDP ratio and unemployment rate in several counties, Russian-Ukraine crisis, and rising concerns that the euro zone will slide into a triple-dip recession to name a few. This uncertainty resulted in rather fluctuating industrial production throughout the year, which again was reflected in packaging material demand including containerboard and corrugated board.

The year started briskly and the Western European containerboard demand grew nearly three per cent on H1/2014 compared to H1/2013. This was mainly driven by surprisingly well growing manufacturing and agricultural production in Spain and Italy and good market development in Germany especially during the first quarter. Manufacturing and especially domestic demand boosted containerboard in the UK as well whilst the French economy was suffering from weakness of its private sector and containerboard consumption declined by almost one per cent compared to 2013.

The European containerboard and corrugated board market began to fade already in Q2 as tension with Russia started to impact particularly on German industrial production and demand growth in Italy and Spain slowed down. The Spanish containerboard and corrugated box industry is relatively dependent on the French markets, where demand has been declining since Q4/2013. August was a particularly weak month throughout Europe, but picked up again in September especially in the UK, Germany and Spain. The largest Eastern European market, Poland, was performing strongly during all the first nine months as well boosting the CAGR of the whole region close to four per cent.

At this moment Q4 figures are not available yet, but it can be stated that overall market development in Europe was positive in 2014 and Western European containerboard consumption was approximately two percent and that of Eastern Europe some 3.5 per cent higher than in 2013.

Leading producers in acquisition mood

The European containerboard and corrugated board industry has traditionally been very fragmented compared to all the other paper and fibre based packaging grades. This has been related to the business logic and characteristics – corrugated board and recycled containerboard are typically traded locally and the customer base consists of nearby manufacturers and packers requiring often very quick service. Strong locality is still a salient feature in the European industry and even the leading brand owners and packers operating across Europe often need locally specified corrugated boxes.

The European containerboard and corrugated industry consists of companies with a very different strategy and operation modes – from pure containerboard producers to non-integrated box makers. In the containerboard industry consolidation has remained surprisingly unchangeable during the past ten years, with the top five producers still accounting for somewhat less than 40 per cent of the capacity as illustrated in the chart.

This is the situation despite the large transactions such as the merger between Jefferson Smurfit and Kappa Packaging in 2005 and DS Smith's acquisition of SCA Packaging in 2012. During 2014 no large mergers have taken place, but the leading companies have kept on being active and the focus has been on enhancing the business model and strategic movements. Smurfit Kappa continued fortifying its footprint in North America and acquired Bates Container LLC, a non-integrated corrugated packaging manufacturer in the South West. Since the beginning of 1990s SAICA's investment activity has been on paper mills and the company's containerboard capacity has clearly exceeded the consumption by its corrugating operations. SAICA's focus has lately been on balancing these two businesses and in 2014 it acquired two corrugating companies: Microlan in Spain and OMK in Turkey. Other notable transactions were the takeover of Papierfabrik Fritz Peters in Germany by Prinzhorn and Palm Group's acquisition of corrugated board producer Seyfert operating in France and Germany.

Investments progressing

Strive to integration and balance between containerboard and corrugated board production has been driving the investments as well. During 2014 several new projects were progressing: Blue Paper's Strabourg mill in France came on stream already in the fourth quarter of 2013. Smurfit Kappa closed down two old machines at its Townsend Hook mill in Kent in summer 2013 and PM9 replacing them is scheduled to start late 2014. Industry in Germany has been rather stable since the start-up of Propapier PM2 in 2010, but in April Finnish printing and writing (P&W) paper giant UPM announced sale of its Ettringen mill to Aviretta, which plans to convert it to recycled containerboard starting in 2015.

All in all over half a million tonnes of new capacity is planned to enter the market during 2014 and 2015. In the already rather tight market situation rationalisation will be needed. Again the key producers seem to lead the way; in November Smurfit Kappa informed that it is considering permanent closure of Viersen mill in France and in December DS Smith's plans to divest Nantes mill, also located in France, were reported.

In virgin fibre based grades the balance is different; Europe is a net exporter of unbleached kraftliner and main volumes are imported from the US. For a long time major investments are taking place in kraftliner as well and the Nordic countries are the pivot of the action. In April Stora Enso revealed its decision to convert a copy paper machine into kraftliner production in Finland – very positive news in a country where several P&W paper machines have been shut down since 2009. Metsä Board in its turn has announced that it will continue transforming its Husum mill in Sweden from office papers to packaging grades including fully bleached kraftliner, for which production started already in spring 2013.

EUROPEAN CONTAINERBOARD INDUSTRY 2004 AND 2014

Newsprint Review

Riku Kallio
Senior Consultant
Pöyry Management Consulting

Since last year…

In last year's article for the same publication we ended with the words "With continuing demand decline, the newsprint machine shut downs will be common also in the coming years". Well, in 2014 we have not seen any significant newsprint machine shut downs but it is very recently that the latest plans have been announced – with strong implications for the UK. UPM has announced its plans to shut one newsprint machine at Shotton mill in Wales and another newsprint line is planned to be shut in UPM's mill in France. Aside from these, the company has also plans to reduce capacity in other mechanical printing and writing paper markets.

It goes without saying that it is always sad to see mills shut down and this is particularly unfortunate for those whose lives it impacts the most – the employees of these papermills. However, there is always the other side to consider too. As many already know, it is evident by looking at the production and consumption statistics that the demand for newsprint is declining and the future prospects are not looking particularly good. It is hard to find any seriously considerable scenarios under which the decline could be even slowed down – not to even mention reversed. It is out of papermakers' hands to turn the consumer's preferences and behaviour to something other than it is.

What next…

So this leaves us with the only option to manage with the decline for these grades. Current capacity utilisation in Western Europe is relatively good historically. But with declining demand, the utilisation rate is bound to change. "Overcapacity" does not favour anyone in the newsprint manufacturing sector. To achieve manageable decline and adaptation to "new" market conditions the least efficient assets are continuously under some threat.

Some older newsprint machines may not be very efficient or profitable alone but are either "difficult to close" (e.g. due to costs linked to the closure) or actually contribute positively on the overall paper mill site's performance (e.g. linked to energy balance of the mill site, shared resources with other papermakers etc) or be fully depreciated. As such it is not always transparent on the outside what the different paper companies may be considering when decisions on capacity adjustments are made.

Western European Newsprint Capacity and Production 1999-2014

It is largely ad-spend in the printed media that helps to define the paying capability of newsprint publishers. It is not the revenue from the price of newspapers but the advertising that brings the returns for the publishers – this is why the free newspapers exist.

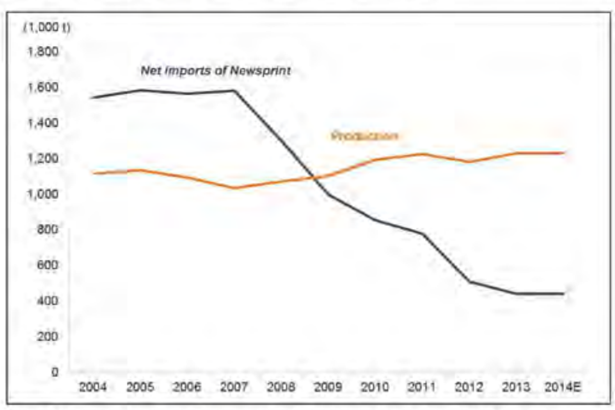
With the ad-spend in printed newsprint going gradually down as the advertisers are moving to other media it can be challenging for paying capability of the publishers to increase significantly. As such there is a question: do newsprint capacity closures really bring the full benefits that are expected from the pricing point of view? Let's say that by removing 5% of current newsprint capacity in Western Europe then capacity would meet demand (100% capacity utilisation) – obviously the pricing power of the newsprint mills would increase but how much are publishers actually willing/able to pay? What share of the printed Newsprint demand is critical for the publishers?

In practice the picture is maybe not quite as negative as painted above and a high level answer to the above question is that the printed newspapers do still have significant value for publishers, and Pöyry is not predicting sudden collapse in the demand. Furthermore there are newsprint mills which are at least "reasonable" assets for their owners.

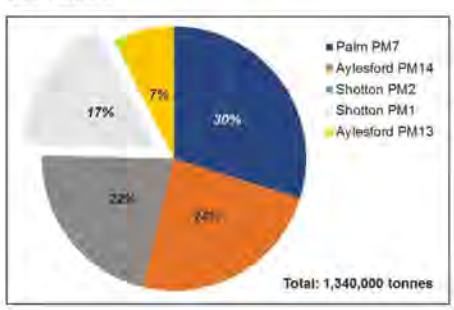
Are there any positives?

In a word "yes": we don't expect sudden rapid decline, but a gradual decline; some mills can have good potential to reduce cost base; there was some newsprint price increases in 2014 (in real terms); emerging markets are more positive… Overall the business continues as usual but in an uncertain and challenging environment. The industry can evolve and adapt – you cannot manipulate market forces but your own position can still be in your own hands.

The UK newsprint industry appears relatively well balanced, particularly after the foreseen capacity closure in 2015. Shutting down one newsprint machine would leave the UK with four newsprint machines. With the UK and Ireland being still significant net importers of newsprint there appears to be robust local markets for the UK Newsprint producers. Finally we must recognise that the situation here is more positive than in some other countries.



The UK and Ireland Newsprint Production and Net Imports 2004-2014



The UK Newsprint Capacity by PM (Shotton PM1 planned to be closed in 2015

Tissue Review

Pirkko Petäjä
Principal,
Pöyry Management Consulting Oy

Tissue industry continues to grow

The global tissue market has continued on a solid growth track. Consumption is expected to grow in all regions up to 2025. No major changes in product category structures are forecast, also market segment structures develop gradually; consumer tissue grows slightly faster than AfH, as the growth is fastest in emerging markets; for the same reason toilet paper will gain slightly in market share.

North America is the biggest regional market with over 8 million tonnes annual consumption, followed by Western Europe with approximately 6.5 million tonnes/a consumption. China has become the third biggest market, as the consumption has grown to some 6 million tonnes/a.

Per capita consumption of tissue is clearly highest in North America (24kg). The core tissue market in North America has basically saturated. Therefore, the growth prospects are limited and mainly driven by the population. The expected tissue demand growth for 2013-20 period is at 1.3%/a. The supplier focus has moved from volume to value.

Tissue consumption per capita is about 15kg in Western Europe and Japan. Growth prospects are stagnating especially in Japan due to sluggish population growth.

China has been the fastest growing tissue market, but per capita consumption level is still relatively low – at about 4.6kg. Currently in China the growth rate is some 6%/a while in other Far East Asian countries (excluding Japan) the growth averages to global average level. The Middle East countries currently grow at even faster rate than China, as an average some 7%/a.

The growth will be driven by the urbanisation and 'westernisation' of lifestyles – increasing the market penetration of different tissue products. Additionally, product quality trends are expected to support the tissue market growth – e.g. as the consumers are gradually shifting from 1-2 ply structure toilet papers to higher quality products.

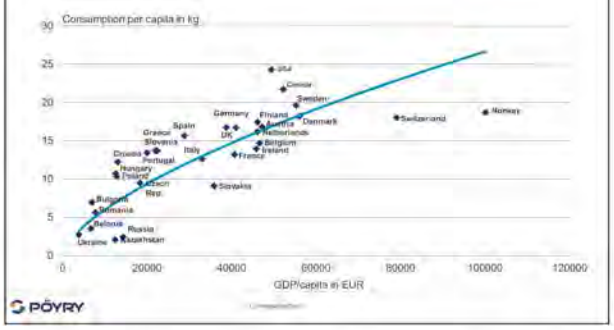
In addition to China, emerging markets such as Latin America (+5.2%/a) and Eastern Europe (+6.1%/a) provide healthy growth opportunities for the industry.

European tissue market is foreseen to grow by nearly 3%/a

European tissue demand is foreseen to continue to grow at a stable rate of 2.9%/a through 2020. Eastern Europe is expected to drive the growth in Europe. Current per capita consumption in Eastern Europe is at 5kg, which is some 10kg below the Western European average. Growth of disposable incomes, as well as improving local tissue supply and developments in retail trade, are expected to support the market growth in Eastern Europe.

TISSUE CONSUMPTION AND GDP PER CAPITA IN EUROPE

Per capita consumption correlates strongly with economic strength. Austria and Italy position very close to the level that is expected on their GDP/capita level. France, Switzerland and Slovakia position below. When the GDP is strongly based on income from oil and other raw material trade (Norway, Russia, Kazakhstan) correlation to tissue usage is less evident.



Sluggish population growth will limit the growth opportunities in Western Europe, but in terms of volume growth prospects, Western European markets continue to be relatively attractive. The growth in Western Europe will be driven by the quality improvements, increased market penetration in towelling categories, and the growth opportunities in Away-from-Home market.

Share of consumer product market in Western Europe is about 71% and in Eastern Europe 78%. However, long term growth is foreseen higher in Away-from-Home market.

Germany is the biggest single tissue market in Europe with about 1.4 million tonnes annual consumption. The growth of German tissue market is expected to continue at 2%/a through 2020.

Southern European tissue market growth is expected to continue sluggish, due to the weak macroeconomic environment influencing the consumer spending. This is the case especially in the Iberian Peninsula and for instance in Greece.

Tissue demand growth slowed down in France and the UK during 2007-13 period. Modest growth is expected to continue in France, but in the UK the demand is foreseen to gradually pick up towards end-2010s.

In Eastern Europe, Poland and Russia are the most attractive markets in terms of volume growth prospects. These two countries represent about 50% of the total demand increment in Eastern Europe through 2020.

European companies focus on strengthening their position

In Western Europe the capacity increases and investments are modest while activity is rather lively in Eastern Europe. Consolidation and mergers and acquisitions are the typical feature shaping the European tissue industry.

Companies strive for strengthening their profitability, finding strategic focus areas and searching for dominant market position in selected segments and regions. Continuous improvement programs and strategic capacity additions/divestments as needed characterise the European industry's behaviour.

Wood-Based Panels Industry Review

Isabelle Brose

Economic Adviser,

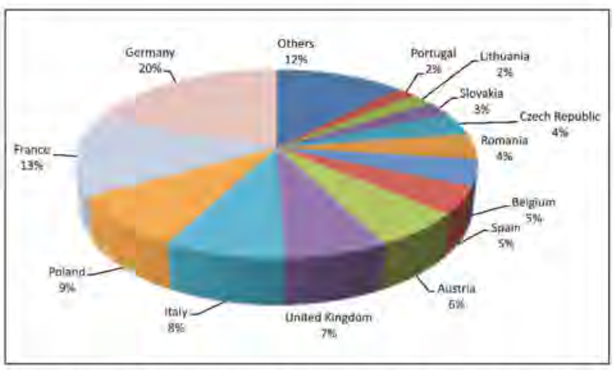
European Panel Federation

EPF

In 2013, the European particleboard production in the EPF member countries shrank further though to a lesser extent than in 2012, by 1.5% compared to -5.5% in 2012. Output amounted to 28.4 million m³. This production level thus remains far below the output peak of 37.8 million m³ observed in 2007.

In 2013, the largest downward variations of national particleboard production was observed in Greece and Norway. Both countries experienced substantial declines in production capacity. On the other hand, significant increases of output were noted in Lithuania, the United Kingdom and Estonia. The Baltic States seem to be recovering earlier from the economic crisis while the British housing sector has upturned in 2013 and started to support recovery in the particleboard industry.

With a stable output, Germany remained the largest particleboard producing country in Europe during 2013, accounting for somewhat less than one fifth of the EU-EFTA production volume. France and Poland continued to complete the particleboard producers' podium despite decreases in their production. Notwithstanding a significant drop in output, Poland kept its third place at the expense of Italy where production also decreased. With its double-digit increase of production, the United Kingdom joined the club of the producers of more than 2 million m³ of particleboard in 2013 and completed the top five. Together, these five countries accounted for 57.6% of the total EU-EFTA production in 2013.



Breakdown of particleboard production by country in 2013

The overall European particleboard production capacity declined by 1.8% or 715,000 m³ in 2013 and amounted to almost 39 million m³. The largest declines in production capacity took place in Spain, France and Greece. In Romania and Bulgaria, on the contrary, production capacities further increased slightly.

The expectations for this year are stable to slightly positive. The rise in production in the EU-EFTA area as a whole is estimated at +1.5% for 2014. This should result in a particleboard production slightly below 29 million m³.

Following a significant drop by 6% in 2012, MDF production in Europe upturned by 2.1% in 2013 reaching 11.2 million m³, excluding Turkish and Russian production. However, this production level remains significantly lower than the peak of 13.3 million m³ in 2007. With a stable output of about 3.5 million m³, Germany is still the largest European MDF producer in 2013. Poland kept its second position. Third to fifth positions have been redistributed among France, Spain and Italy which follow and complete the top five of the European MDF producers. Their joint output accounted for a stable share of 77% in the overall European MDF production. In 2013, MDF consumption in Europe remained quite flat and exceeded 10.2 million m³.

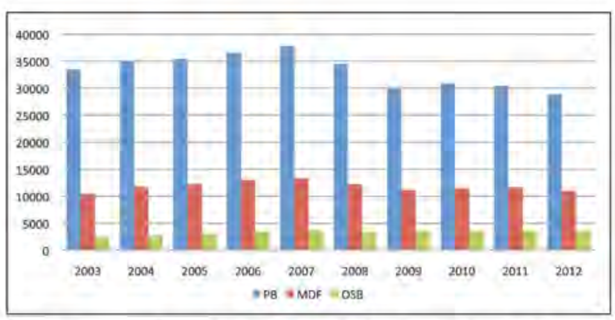
The production capacity of MDF in Europe remained unchanged in 2013. The total capacity amounted to a little over 15 million m³.

The European production of OSB rose significantly by 6% in 2013 and exceeded 3.7 million m³. This level is now approaching the production peak of 2007. Germany and Romania have the largest European OSB production capacities. Thanks to an investment in Italy that became operational in the course of 2013, the European production capacity of OSB increased and exceeded the 5.5 million m³ threshold.

This year EPF continued to gather statistics on the activities of its fibreboard producing members. In 2013, the production of hardboard in Europe decreased by 5% compared to 2012, reaching almost 675,000 m³ excluding Russia. Total EU28 and EFTA installed production capacity for hardboard amounted to 841,000 m³ in 2013. The main European producer is Poland, followed by France and Bulgaria.

Following a slight increase by 2% in 2012, the European production of softboard, including Norway and Switzerland, gained momentum in 2013 and grew by 8%, exceeding the 4 million m³ threshold. Rigid board accounted for 68% of the output and flexboard for 32%. The installed production capacity for rigid softboard reached 3.7 million m³ in 2013 while the production capacity for flex softboard amounted to 2 million m³. Whatever its type, Poland, France and Germany are the main softboard producers in Europe.

The general economic situation in Europe has started to improve gradually. Consumers' confidence and other indicators point towards a certain optimism although signs of sustained growth are still missing. However, our industry is still fighting to get out of the economic downturn and proved already successful for OSB and softboard, and for MDF though to a lesser extent. Unfortunately, the markets for particleboard and especially hardboard have not yet shown a significant upturn.



Overall production of Particleboard, MDF and OSB in Europe (1,000 m³), 2003-2013

Conferences for 2015

11 February
Ingede Symposium, Germany
www.ingede.org

16 - 19 March
Tissue World Europe, Spain
www.tissueworld.com

18 - 22 April
PaperCon 2015 (inc Tappi Centenary), USA
www.tappi.org

28 - 30 April
Asian Paper 2015, Indonesia
www.asianpapershow.com

3 - 5 May
International Pulp Week 2015, Canada
www.internationalpulpweek.com

21 - 28 June
Its Tissue, Italy
www.itstissue.com

30 June - 2 July
Zellcheming Expo-2015, Germany
www.zellcheming.de

14 – 16 October
China Paper 2015, China
http://en.chinapaperexpo.cn

14 - 16 October
MIAC, Italy
www.miac.info

22 – 24 October
PaperME, Egypt
http://papermideast.com

1 - 4 November
12th Paperex, India
http://india.paperex-expo.com

Industry Statistics 2013

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

2013 – Summary

No new start-ups occurred during the year; only one site closed permanently – the speciality Stowford Mill of Arjowiggins in Ivybridge, Devon, which removed around 10ktpy; also, the two machines in Snodland ceased production mid-year, as part of the plan to redevelop the site and erect a single reconditioned machine. Statistics show an increase in 100kt production, compared to 2012; given the loss of around sixth month's production from Snodland (a theoretical 120kt) this is almost certainly due to ramping up of the SAICA machine, which came on line early in 2012 but which ran at or below 80% capacity for much of that year, and to the fact that capacity versus actual production has only ever a nominal relationship, so utilisation was slightly higher all round in 2013 compared to 2012.

2014 – Preliminary Assessment

The most significant event during 2014 was undoubtedly the announcement from UPM to close the older of their two PMs at Shotton Mill in Deeside. Although this will not affect the 2014 statistics, it is a major blow to the UK industry as a whole, as ultimately it will remove a significant chunk of UK paper production and affect a large number of jobs.

Aside from this very sad decision, the UK Industry as a whole seemed to weather the various storms quite well. Indeed, there was the notable success occasioned by start-up of the 65MW biomass plant at the Tullis Russell Glenrothes site during the first quarter. Meanwhile, construction at the Smurfit Kappa Snodland Mill continued throughout the year, although ultimately the project was slightly behind schedule as start-up was due near the end of 2014.

In the wood panel sector, Norbord received planning permission to expand its Dalcross OSB plant in Scotland, by installation of a new 57MWth biomass boiler. Likewise, Kronospan received permission to upgrade the biomass power plant at its MDF/particleboard mill in Chirk, Wales. Meanwhile, Smartply obtained €57M investment to upgrade its OSB plant in County Kilkenny, Ireland, primarily with a new continuous OSB production line from Siempelkamp.

2015 – Preview

The preview from last time could be repeated verbatim this time, since the tiny Whatman mill near Maidstone did not close last year, but is now slated for closure during Q1 2015; meanwhile the new PM9 at Snodland did not come on line last year as was predicted, but should do in early 2015. Aside from these two changes we already know Shotton PM1 (215ktpy of recycled newsprint) will close by the end of Q1, as part of UPM's strategy to reduce exposure to publication grades.

Aside from these changes, no other information about current mill capacity in the UK was available at the time of writing. Of course, in the last couple of years, three increases in tissue capacity have been mooted: Accrol (Blackburn); Disley PM2 (Stockport); and Sidcott Investments (Oldham). Also, Plastique, a moulded fibre manufacturer with production facilities in Poland is said to be looking to introduce moulded fibre production in the UK. However, none of these are likely to come to fruition in the current economic climate; nevertheless they do remain an outside possibility, given the fact that, relatively speaking, tissue and moulded pulp plants are both relatively cheap to start, compared to a graphical or packaging mill, or a wood panel plant.

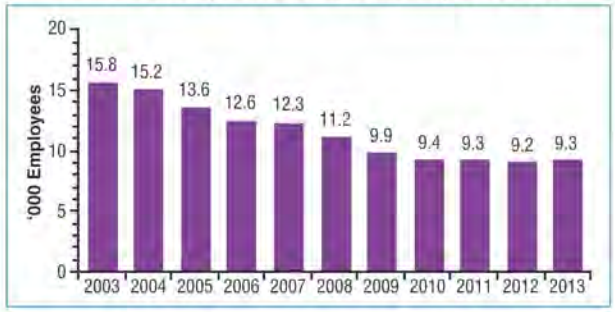
Daven Chamberlain, Editor, Paper Technology

cpi confederation of paper industries

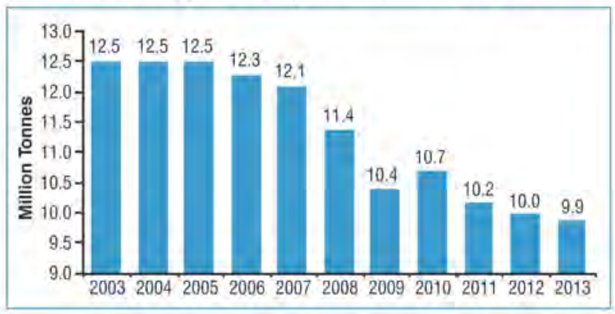
cepi

UK Data (CPI/HM Revenue & Customs)

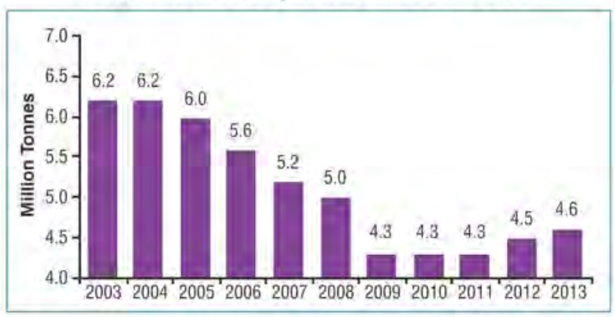
Numbers Employed in the Paper Industry 2003-2013



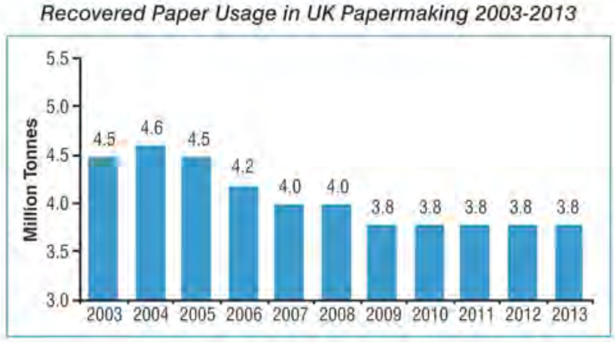
UK Consumption of Paper and Board 2003-2013



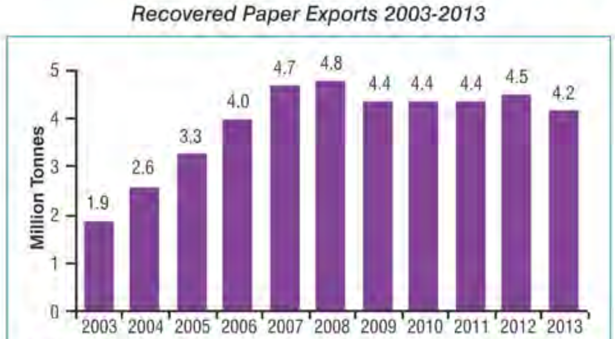
UK Production of Paper and Board 2003-2013



Recovered Paper Usage in UK Papermaking 2003-2013

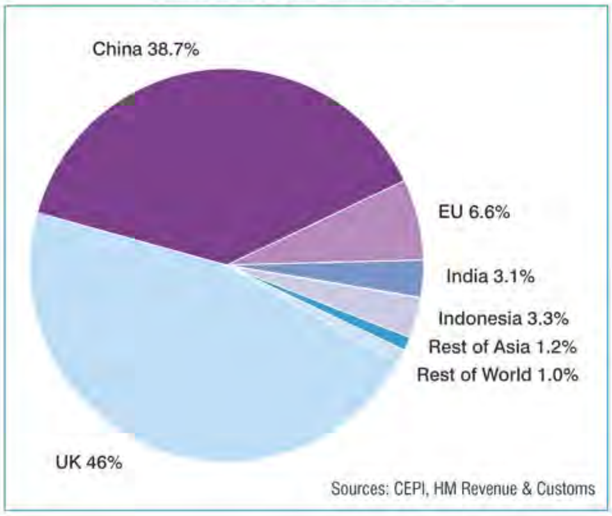


Recovered Paper Exports 2003-2013

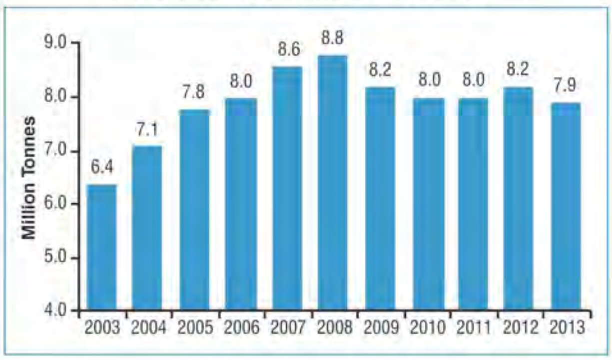


Source: HM Revenue & Customs

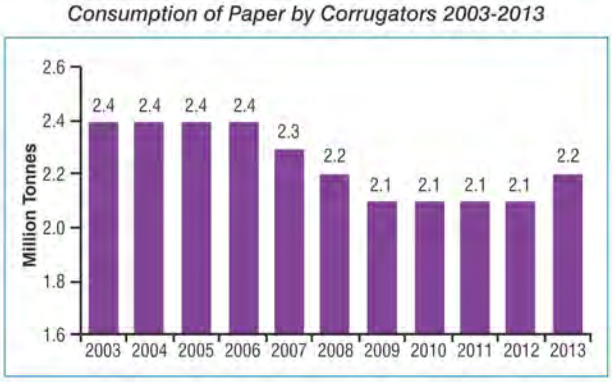
Recovered Paper Markets 2013



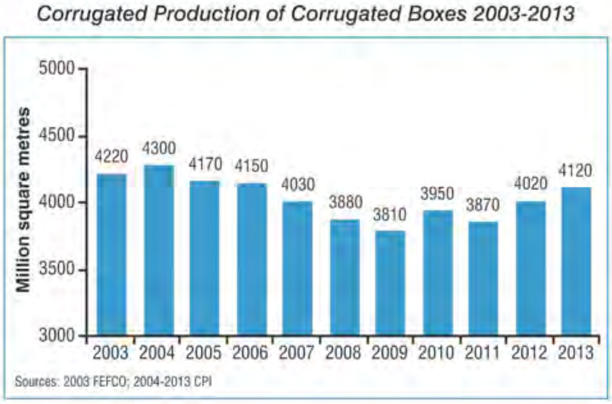
Recovered Paper Collection 2003-2013



Consumption of Paper by Corrugators 2003-2013



Corrugated Production of Corrugated Boxes 2003-2013



Industry Facts 2013

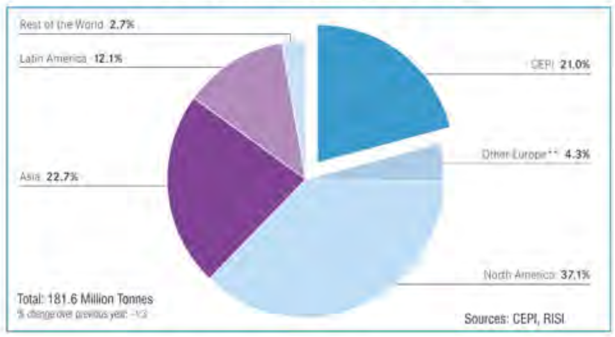
CPI Member Companies	**68**
CPI Member Employees	**19,000**
Paper & Board Production* ('000 Tonnes)	**4,561.3**
Corrugated Production (Million Sq. Metres)	**3,561.8**
Recovered Paper Collection ('000 Tonnes)	**7,869.2**
Tissue Parent Reel Production ('000 Tonnes)	**801.8**

** includes parent reel production*

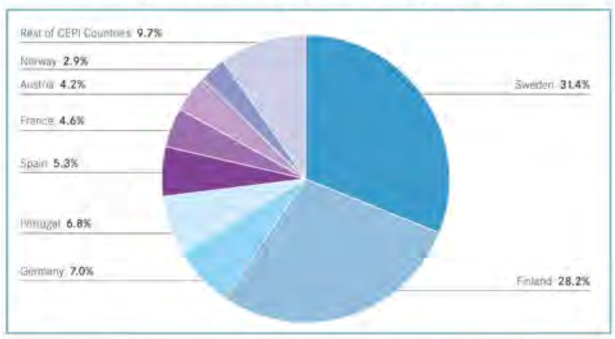
European Data (CEPI)

Pulp – Global View

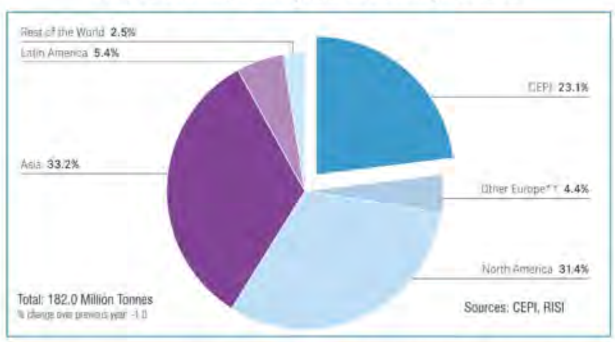
Pulp Production by Region in 2012



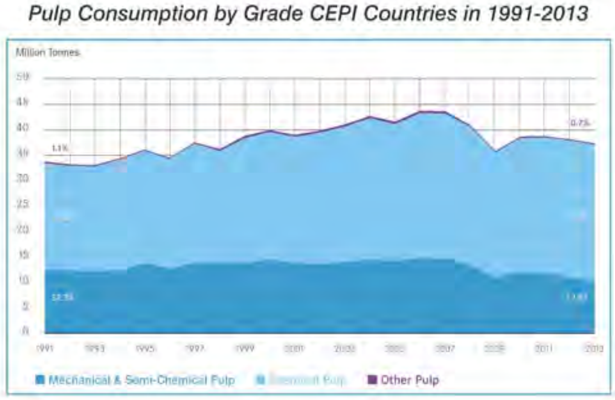
Pulp Production by CEPI Country in 2013



Pulp Consumption by CEPI Country in 2012



Pulp Consumption by Grade CEPI Countries in 1991-2013



Pulp

CEPI Exports of Pulp to Other Regions 2000-2013

000 Tonnes	2000	2005	2010	2012	2013	% Share of Total	% Change 2013/2012
Other Europe	724	674	719	771	**807**	21.0	4.7
North America	104	187	62	43	**60**	1.6	40.0
Latin America	6	20	49	64	**73**	1.9	14.3
Asia	412	1,076	1,595	2,874	**2,746**	71.5	-4.4
Rest of the World	86	114	142	174	**156**	4.1	-10.1
Total	**1,332**	**2,071**	**2,567**	**3,925**	**3,843**	**100.0**	**-2.1**

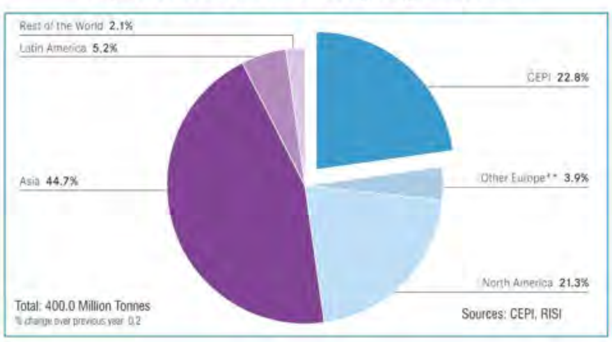
CEPI Imports of Pulp from Other Regions 2000-2013

000 Tonnes	2000	2005	2010	2012	2013	% Share of Total	% Change 2013/2012
Other Europe	657	615	480	661	**638**	8.3	-3.4
North America	4,623	3,891	2,292	2,040	**1,971**	25.5	-3.3
Latin America	1,916	2,825	4,733	5,029	**4,983**	64.4	-0.9
Asia	272	197	134	53	**68**	0.9	27.4
Rest of the World	456	433	81	75	**77**	1.0	2.0
Total	**7,924**	**7,961**	**7,721**	**7,857**	**7,737**	**100.0**	**-1.5**

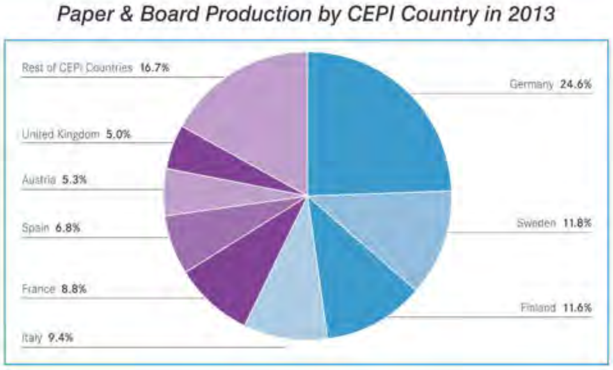
Trade Flows of Pulp to and from CEPI Countries in 2013

Paper – Global View

Paper & Board Production by Region in 2012

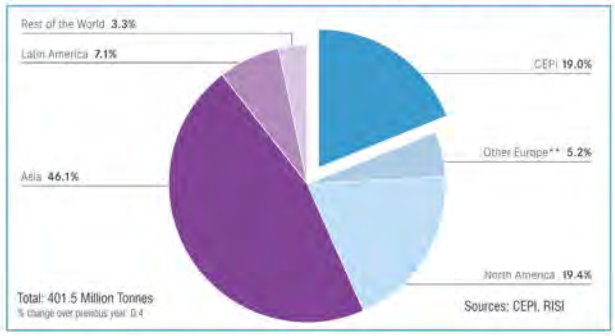


Paper & Board Production by CEPI Country in 2013



Paper & Board Production and Consumption in CEPI Countries 1991-2012

Paper & Board Consumption by Region in 2012



CEPI Exports of Paper & Board to Other Regions 2000-2013

000 Tonnes	2000	2005	2010	2012	2013	% Share of Total	% Change 2013/2012
Other Europe	6,090	6,825	7,349	7,257	**7,269**	37.1	0.2
North America	2,283	2,802	2,055	1,983	**2,083**	10.6	5.1
Latin America	874	1,194	1,879	1,899	**1,879**	9.6	-1.1
Asia	2,933	4,742	5,099	5,472	**5,289**	27.0	-3.3
Rest of the World	1,707	2,229	2,783	3,249	**3,098**	15.8	-4.6
Total	**13,887**	**17,793**	**19,164**	**19,860**	**19,619**	**100.0**	**-1.2**

CEPI Imports of Paper & Board from Other Regions 2000-2013

000 Tonnes	2000	2005	2010	2012	2013	% Share of Total	% Change 2013/2012
Other Europe	3,318	2,727	2,525	2,245	**2,198**	45.5	-2.1
North America	2,191	1,915	1,829	1,585	**1,439**	29.8	-9.2
Latin America	198	498	498	423	**386**	8.0	-8.7
Asia	332	394	625	456	**536**	11.1	17.5
Rest of the World	344	369	307	383	**270**	5.6	-29.5
Total	**6,383**	**5,903**	**5,783**	**5,092**	**4,829**	**100.0**	**-5.2**

Trade Flows of Paper & Board to and from CEPI Countries in 2013

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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)

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Manager: Gabriele Herzog

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Year and Place of Foundation: 1947, Paris
Chairman: L. Lanat *General Secretary:* D. Gomez
Président: Hugues Leydier

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website: www.pita.co.uk
Year of Foundation: 1920
Chairman: Graham Moore
Chief Executive: Barry Read

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Chairman: Alessandra Bogliano
General Secretary: Massimo Ramunni
President: Lido Ferri

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Year of Foundation: 1946
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President: Maria Isolete da Silva Torres Matos
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Year of Foundation: 1908
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World Paper Industry Technical Associations

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President: Ramiro Peralta
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Year of Foundation: 1947
President: Mr. Kunio Suzuki
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Year of Foundation: 1915
President: Larry Montague
Chairman: Thomas J Garland

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Year of Foundation: around 1985
President: Erasmo Jiménez

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Tel: 01769 540789
Email: js.seaman@environment-agency.gov.uk
Website: www.environment-agency.gov.uk
Contact: Spence Seaman

ENVIROSYSTEMS (UK) LTD
Recyclers of Papermill Waste
Bartle Cross Park, Barton, Preston, Lancashire, PR3 5AX
Tel: 01772 860085 Fax: 01772 866077
Email: erussell@envirosystems.co.uk
Website: www.envirosystems.co.uk
Contact: Liz Russell

F

FOURSTONES PAPER MILL CO LT
Papermaking and converting of creped and absorbent papers
South Tyne Mill, Fourstones,
Hexham, Northumberland, NE46 3SD
Tel: 01434 602444 Fax: 01434 607046
Website: www.fourstonespapermill.co.uk
Contact: Peter Duxbury

G

G.B.C (SPECIALITY CHEMICALS) LTD
Chemicals
The Old Fire Station, Browns Lane,
Charlbury, Oxon, OX7 3QW
Tel: 01608 813088 Fax: 01608 813089
Email: info@gbcspecs.co.uk
Website: www.luminova.co.uk
Contact: Adrian Iley

GLATFELTER LYDNEY LTD
Paper Manufacturer
Church Road, Lydney,
Gloucestershire, GL15 5EJ
Tel: 01594 846 493
Email: david.foulds@glatfelter.com
Website: www.glatfelter.com
Contact: David Foulds

GLATFELTER

H

HEIMBACH UK LTD
Paper Machine Clothing - Forming/Pressing/Drying/Belting
Bradnor Road, Wythenshawe, Manchester, M22 4TS
Tel: 0161 998 6911 Fax: 0161 998 8095
Email: chris.kershaw@heimbach.com
Website: www.heimbach.com
Contact: Christopher Kershaw

HONEYWELL CONTROL SYSTEMS LTD
QCS, DCS and CD Actuators – Integrated Measurement, Control and Safety Systems
Honeywell House, Skimped Hill Lane, Bracknell.
Berkshire, RG12 1EB
Website: www.experionmx.com

I

IMERYS MINERALS LTD
Kaolin, talc & calcium carbonate suppliers
Par Moor Centre, Par Moor Road, Par, Cornwall, PL24 2SQ
Tel: 01726 818040 Fax: 01726 811200
Email: graham.pring@imerys.com
Website: www.imerys.com
Contact: Graham Pring

IMERYS KAOLIN & TALC
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
Prestbury Court, Greencourts Business Park, 333 Styal Road, Manchester, M22 5LW
Tel: 0161 435 3346 Fax: 0161 435 3341
Email: catherine.cooper@nstarch.com
Website: www.ingredion.com
Contact: Catherine Cooper

INTERTISSUE LTD
Tissue Manufacturer
Brunel Way, Baglan Energy Park, Briton Ferry, Neath, SA11 2HZ
Fax: 01639 825 381
Email: giuseppe.munari@sof
Contact: Giuseppe Munari

INVISTA LTD
Manufacture of process and environmental sensors for the paper industry
23 Murrell Green Business Park, London Road, Basingstoke, Hampshire, RG27 9GE
Tel: 01256 766 716
Email: john.middleton@invista-sensors.com
Website: www.invista-sensors.com
Contact: John Middleton

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

KADANT UK LTD
Papermaking Engineers
Woodhill Road, Bury, Lancashire, BL8 1BD
Tel: 0161 764 9111 Fax: 0161 762 7192
Email: philip.drury@kadant.com
Website: www.kadant.com
Contact: Philip Drury

KEMIRA PULP & PAPER CHEMICALS
Specialty Paper chemicals
Bowling Park Drive, Bradford, Yorkshire, BD4 7TT
Tel: 01274 762242 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

KWI (UK) LTD
Specialist in DAF technology and filtration for effluent & white water clarification
Units 8/9, Cambrian Business Park, Bromfield Industial Estate, Mold, Flintshire, CH7 1NJ
Tel: 01352 700224 Fax: 01352 700396
Email: office-uk@kwi-intl.com
Website: www.kwi-intl.com
Contact: Phil Woollen

O

OMNIA-CHEM
Speciality Chemicals for the Paper Industry
Waterside Business Park, Hadfield, Glossop, Derbyshire, SK13 1BE
Tel: 01457 858777 Fax: 01457 858785
Email: s.finch@omnia-chem.co.uk
Website: www.omnia-chem.co.uk
Contact: Steve Finch

P

PAQUES BV
Anaerobic & Aerobic Effluent Treatment Systems, Biogas Desulphurization
P O Box 52, T. De Boerstraat 24, Balk, 8560 AB, The Netherlands
Tel: +31 514 608500 Fax: +31 514 603342
Email: w.driessen@paques.nl
Website: www.paques.nl
Contact: Willie Driessen

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)
Sahankatu 2, Rauma, 26100, Finland
Tel: 00 358 2 8377 4400
Email: Kaarlo.Talvinen@raumaster.fi
Website: www.raumasterpaper.fi
Contact: Kaarlo Talvinen

RENAISSANCE CHEMICALS LTD
Silver Biocide, Aloe Vera, Natural Oils, Specialty Dyes and Fluorescers, Bespoke products for special applications
Unit 1, Blackwood Hall Business Park, North Duffield, Selby, Yorkshire, YO8 5DD
Tel: 01757 282101
Website: www.renchem.co.uk
Contact: Howard Weaver

ROQUETTE UK LTD
Suppliers of native and modified starches and starch derivatives
Sallow Road, Corby, Northants, NN17 5JX
Tel: 01536 273096
Email: martin.georgeson@roquette.com
Website: www.roquette.com
Contact: Martin Georgeson

S

SKF (UK) LTD
Rolling bearings, seals, mechatronics, lubrication systems and services
Sundon Park Road, Luton, Bedfordshire, LU3 3BL
Tel: 01582 490049 Fax: 01582 848091
Email: marketing.uk@skf.com
Website: www.skf.com
Contact: Samantha Tonge

SMITHERS PIRA
Research, Consultancy, Training and Information
Cleeve Road, Leatherhead, Surrey, KT22 7RU
Tel: 01372 802127 Fax: 01372 802249
Email: gmoore@smithers.com
Website: www.smitherspira.com
Contact: Graham Moore

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

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
Spray Nozzles
Farnham Business Park, Weydon Lane, Farnham, Surrey, GU10 8QT
Tel: 01252 727200
Email: david.yates@spray.com
Website: www.spray.com
Contact: David Yates

T

TEST-TECH
PAPER TESTING AND TECHNOLOGY LTD
Testing and Development Service for the paper industry
Unit 6, St George's Industrial Estate, White Lion Road, Amersham, Bucks, HP7 9JQ
Tel: 01494 544811 Fax: 01494 766798
Email: nick.kite@test-tech.co.uk
Website: www.test-tech.co.uk
Contact: Nick Kite

TULLIS RUSSELL
Premium Paper & Board
Markinch, Glenrothes, Fife, KY7 6PB
Tel: 01592 753311 Fax: 01592 755872
Email: angus.mollison@tullisrussell.com
Website: www.tullisrussell.com
Contact: Angus Mollison
Website: www.timwattsassociates.com

Employee owned, partnership driven.

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
Email: jorma.jarvinen@valmet.com
Website: www.valmet.com
Contact: Jorma Järvinen

VERNACARE LTD
Folds Road, Bolton, Lancashire, BL1 2TX
Phone: 01204 529494 Fax: 01204 521862
Email: steve.birch@vernagroup.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.com
Products: Teabag, Speciality

2

MOUNT SION WORKS
Sion Street, Manchester, M26 3SB
Tel: 0161 725 5320
www.ahlstrom.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-tracingpapers.com
Products: Tracing

5

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

6

ASIA FILE CORPORATION BHD
Higher Kings Mill
Cullompton, Devon, EX15 1QJ
Tel: 01884-863600
www.higherkings.co.uk
Products: Recycled coloured paper and board

7

AYLESFORD NEWSPRINT LTD
Newsprint House, Bellingham Way,
Aylesford, ME20 7DL
Tel: 01622-796000
aylesford-newsprint.co.uk
Products: Standard Newsprint (100% RCF)

8

BILLERUD BEETHAM LTD
Waterhouse Mills
Beetham, Milnthorpe, Cumbria, LA7 7AR
Tel: 01539-565000
www.billerud.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: 01256-117990
www.delarue.com
Products: Banknote, Security

11

DE LA RUE SECURITY PAPERS
Bathford Paper Mills
Bathford, Bath, BA1 7QG
Tel: 01225-859903
www.delarue.com
Products: Security (not Banknote)

DS SMITH PAPER

12

KEMSLEY PAPER MILL
Sittingbourne, Kent, ME10 2TD
Tel: 01795-518900
www.dssmithpaper.com
Products: Fluting, Testliner, Plasterboard and DIP (all from 100% RCF)

13

WANSBROUGH PAPER MILL
Watchet, Somerset, TA23 0AY
Tel: 01984-631456
www.dssmithpaper.com
Products: Coreboard, Testliner 3, Envelope, Wrappings

FOURSTONES PAPER MILL CO LTD

14

SAPPHIRE MILL
Leslie, Glenrothes, Fife, KY6 3AB
Tel: 01592-328652
www.fourstonespapermill.co.uk
Products: Tissue

15

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

16

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

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

19 **INNOVIA FILMS LTD**
Wigton, Cumbria, CA7 9BG
Tel: 01697-342281
www.innoviafilms.com
Products: Regenerated Cellulose Film

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 4WZ
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 (40,000tpy) from wood pulp

NORTHWOOD PAPER SALES LTD

26 **CONNECT HYGIENE PRODUCTS LTD**
Disley Mill
Waterside, Disley, Cheshire, SK12 2HW
Tel: 01663-762701
www.connecthygiene.co.uk
Products: Tissue

27 **PETER GRANT PAPERS LTD**
Lansil Way, Caton Road, Lancaster, LA1 3PQ
Tel: 01524-843678
www.petergrantpapers.com
Products: Tissue

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

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

30 **PHOENIX GREEN RESOURCES LTD**
Rotherham, South Yorkshire
(New site under constuction)
www.phoenixgreenresources.com
Products: Wood pulp (approx. 10,000tpy)

31 **POOL PAPER MILLS**
Weidmann Whitely Ltd
Pool-in-Wharfedale, Otley,
West Yorkshire, LS21 1RP
Tel: 01132-027000
www.weidmann-whitely.com
Products: Insulation, Pressboard

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 4RF
Tel: 01392-881731
www.purico.co.uk
Products: Teabag, Overlay, Sausage Casing.

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

SCA HYGIENE PRODUCTS LTD

36 **CHESTERFIELD PAPER MILL**
Walton, Chesterfield, S40 2PH
Tel: 01246-558557
www.sca.com
Products: Tissue

37 **OAKENHOLT MILL**
Oakenholt, Nr Flint, Flintshire, CH6 5PU
Tel: 01352-732101
www.sca.com
Products: Tissue

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

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

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

44 **NORTHERN TISSUE GROUP LTD**
Lansil Way, Lancaster, LA1 3QY
Tel: 01524-844600
tissue.co.uk
Products: Tissue

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

46 **SONOCO BOARD MILLS LTD**
Stainland Mills
Holywell Green, Halifax, West Yorkshire, HX4 9PY
Tel: 01422-374741
www.sonoco.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

TULLIS RUSSELL GROUP

48 **TULLIS RUSSELL PAPER & BOARD**
Markinch, Glenrothes, Fife, KY7 6PB
Tel: 01592-761212
www.tullisrussell.com
Products: Fine

49 **TULLIS RUSSELL COATERS LTD**
Church Street, Bollington
Macclesfield, Cheshire, SK10 5QF
Tel: 01625 573 051
www.tullisrussell.com
Products: Coating plant

50 **TWO RIVERS PAPER COMPANY**
Pitt Mill, Roadwater, Watchet, Somerset, TA23 0QS
Tel: 01984-641028
www.tworiverspaper.co
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)

53 **WHATMAN PLC**
Springfield Mill
Maidstone, Kent, ME14 2LE
Tel: 01622-676670
www.whatman.com
Products: Speciality Filter, Blotting, Diagnostic grades
(Slated for closure 2015)

Panel Board Mills in UK & Ireland

54 **EGGER BARONY LTD (particle)**
Barony Road, Auchinleck, KA18 2LL
Tel: 01290-427400
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
www.kronospan.co.uk

57 **MEDITE EUROPE LTD (MDF)**
Redmondstown, Clonmel,
Co. Tipperary, Ireland
Tel: +353 526 182 300
www.medite-europe.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)**
Hill Village, South Molton, Devon, EX36 6HP
Tel: 01769-572991
www.norbord.co.uk

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

62 **SUNDEALA LTD (softboard-type material)**
Middle Mill
Dursley, Gloucestershire, GL11 5LQ
Tel: 01453-540900
www.sundeala.co.uk

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

Moulded Pulp Mills in the UK & Ireland

In cooperation with the International Molded Fiber Association. www.imfa.org

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

65 **GREENBOTTLE LTD**
3B Delph Court, Sullivan's Way, St Helens,
Merseyside, WA9 5GL
Tel: 01744 455 190
www.greenbottle.com

66 **HUHTAMAKI (LURGAN) LTD**
41 Inn Road, Dollinsgtown, Lurgan,
Co. Armagh, BT66 7JN
Tel: 02838 327 711
www2.huhtamaki.com

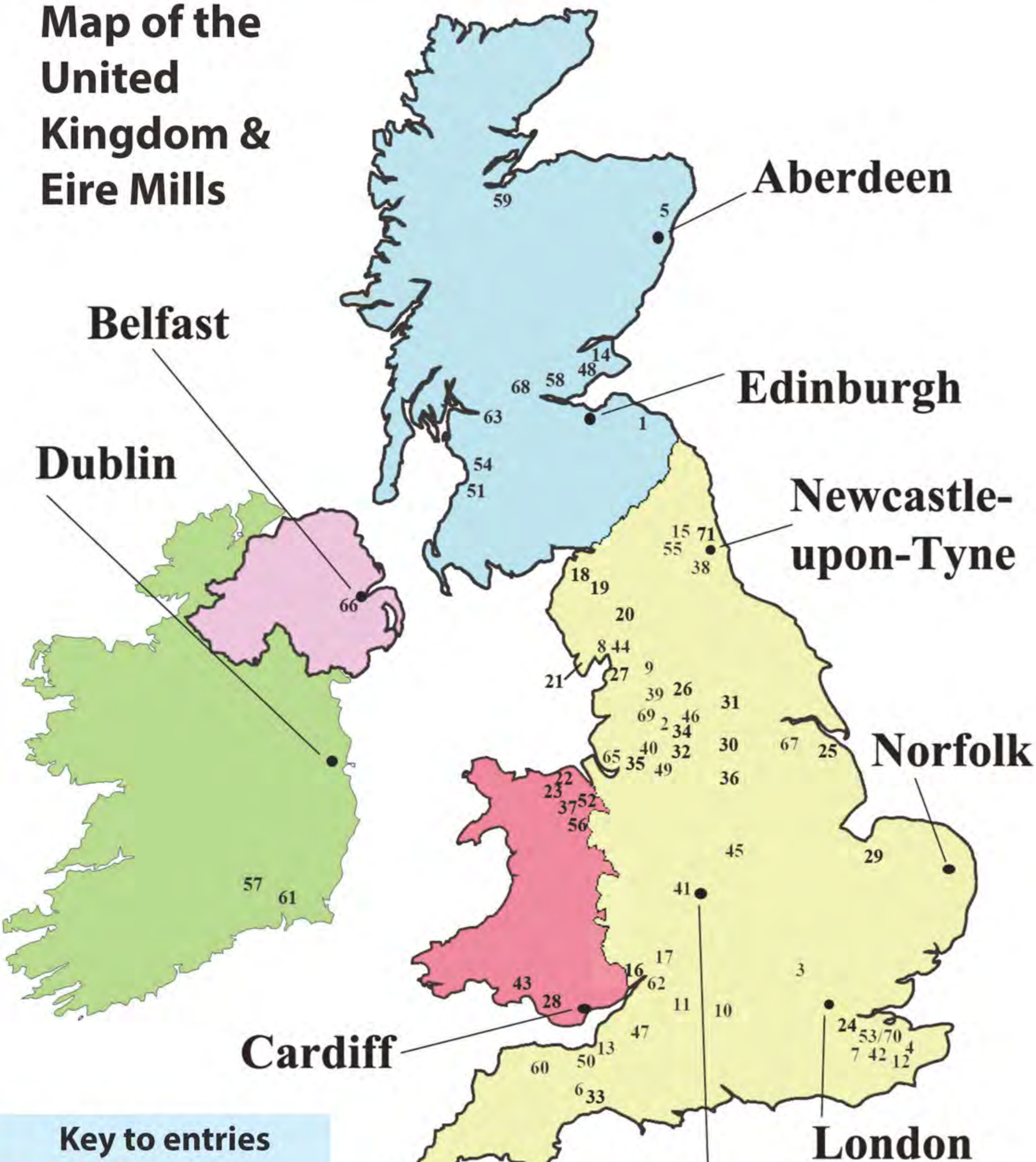
67 **MOULDED FIBRE PRODUCTS LTD**
Flixborough Industrial Estate
Scunthorpe, Lincolnshire, DN15 8SD
Tel: 01724 847 207
www.mouldedfibreproducts.com

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

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

70 **WHATMAN PLC**
Springfield Mill, Maidstone, Kent, ME14 2LE
Tel: 01622 676 670
www.whatman.com
(Slated for closure 2015)

Map of the United Kingdom & Eire Mills



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 14
www.ahlstrom.com

N22
ARJOWIGGINS SECURITY B.V.
Postbus 648, 7300 AP Apeldoorn
Tel: +31 (0)55 - 533 21 32
www.security.arjowiggins.com

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

B4
CATALA S.A.
Grand Route 302, 1620 Drogenbos
Tel: +32 (0)23 - 34 06 11
www.catala.be

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 N.V.
Eendrachtsstraat 30
1951 AZ Velsen-Noord, Postbus 30
Tel: +31 (0)251 - 26 22 33
www.cvg.nl

N23
DE SCHOOLMEESTER PAPIERMOLEN
Guispad 3, NL-1551 SX Zaandijk
Tel: +31 (0)75 - 621 44 65
www.zannschemolen.nl

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

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 GRAPHIC BOARD B.V.
Noorderstraat 394, 9611 AW Sappemeer
Tel.: 31 (0)598 - 31 89 11
www.eskagraphicboard.com

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

N27
HUHTAMAKI NEDERLAND B.V.
Zuidelijke Industrieweg 3-7, 8801 JB Franeker,
Tel: +31 (0)517 - 39 93 99
www2.huhtamaki.com

B6
IDEM PAPERS S.A.
Rue d'Asquempont 2, 1460 Virginal-Samme
Tel: +32 (0)67 - 64 42 11
www.idempapers.com

B5
KARTONFABRIEK ST.-LEONARD N.V.
Vaucampslaan 84, 1654 Huizingen
Tel: +32 (0)23 - 56 57 89
www.kartonfabriek.be

L1
KRONOSPAN SANEM S.A. (OSB, MDF)
Zone Industrielle, 4901 Sanem
Tel: +35 (0)25 - 90 31 11
www.kronospan.lu

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 SJ Arnhem
Tel: +31 (0)263 - 57 61 11
www.openluchtmuseum.nl

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

B8
OUDEGEM PAPIER N.V.
Oude Baan 120, 9200 Dendermonde
Tel: +32 (0)52 - 26 19 11
www.vpk.be

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)23 - 81 07 70
www.herisem.be/en

N25
PAPIERFABRIEK DE MIDDELSTE MOLEN
Kanaal Zuid 497 7371 GL Loenen (Gld)
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 Benelux Mills

Key to entries

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

Useful contact details for Benelux data:

BELGIUM
COBELPA
Association of the Belgian Pulp, Paper and Board Producers
306 Avenue Louise, 1050 Brussels, Belgium
T 32 2 646 64 50
F +32 2 646 82 97
E general@cobelpa.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

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

N10
PARENCO B.V.
Industrieterrein 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.org

B9
SAPPI LANAKEN N.V.
Montaigneweg 2, 3620 Lanaken
Tel: +32 (0)89 - 71 97 19
www.sappi.com

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

N16
INNOVIOPAPERS B.V.
Ambachtsweg 2, 6541 DB Nijmegen
Tel: +31 (0)24 – 371 0911
www.innoviopapers.com

B10
SCA HYGIENE PRODUCTS S.A./N.V.
Rue de la Papeterie 2, 4801 Stembert
Tel: +32 (0)87 - 30 66 11
www.sca.com

N17
SCA HYGIENE PRODUCTS SUAMEER B.V.
Solcamastraat 24, 9262 ND Suameer
Tel: +31 (0)511 - 46 66 66
www.sca.com

N6
SCA NEDERLAND B.V.
Lange Linden 22, 5433 NC Katwijk (NB)
Tel: +31 (0)485 - 33 93 39
www.sca.com

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

N11
SMURFIT KAPPA SOLID BOARD B.V.
Hoofdstraat 34, 9693 ZG Bad Nieuweschans
Tel: +31 (0)50 - 30 33 000
www.smurfitkappa.com

N12
SMURFIT KAPPA SOLID BOARD B.V.
Robertweg 2, 7741 KX Coevorden
Tel: +31 (0)50 - 30 33 000
www.smurfitkappa.com

N13
SMURFIT KAPPA SOLID BOARD B.V.
Halmstraat 1-3, 9745 BC Groningen-Hoogkerk
Tel: +31 (0)50 - 30 33 000
www.smurfitkappa.com

N14
SMURFIT KAPPA SOLID BOARD B.V.
W.H. Bosgrastraat 82, 9665 PH Oude-Pekela
Tel: +31 (0)50 - 30 33 000
www.smurfitkappa.com

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

N21
SOLIDPACK B.V.
Voorsterweg 38, 7371 GC Loenen
Tel: +31 (0)55 - 505 82 22
www.solidpack.eu

B14
SPANO N.V. (particle)
Ingelmunstersteenweg 229, 8780 Oostrozebeke
Tel: +32 (0)56 - 66 70 21
www.spanogroup.be

B15
SPANOLUX S.A. (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

B16
UNILIN BOSPAN N.V. (particle)
Breestraat 4, B - 8710, Wielsbeke
Tel: +32 (0)56 - 67 27 11
www.unilin.com

B17
UNILIN BOARDS (particle & MDF)
Schaapdreef 36, 8710 Ooigem
Tel: +32 (0)56 67 25 11
www.unilin.com

B18
UNILIN WIELSBEKE N.V. (particle)
Ooigemstraat 3, 8710 Wielsbeke
Tel: +32 (0)56 - 67 52 11
www.unilin.com

N7
VAN HOUTUM B.V.
Boutestraat 125, 6071 JR Swalmen
Tel: +31 (0)475 - 50 73 00
www.vanhoutum.nl

Mills in Norway

ARBOR-HATTFJELLDAL A/S
8690 Hattfjelldal, Norway
Tel: +47 75 18 50 00 Fax: +47 75 18 50 01
Website: www.arbor.no
Products: Particleboard

BORREGAARD
Hjalmar Wessels vei 10
1701 Sarpsborg, Norway
Tel: +47 69 11 80 00 Fax: +47 69 11 87 70
Website: www.borregaard.com
Products: Pulp and Speciality Chemicals

FORESTIA AS
Damvegen 31, 2435 Braskereidfoss, Norway
Tel: +47 62 42 82 00
Website: http://forestia.com
Products: Particleboard

HELLEFOSS AS
Hellefossveien 113, N-3300 Hokksund, Norway
Website: www.hellefoss.com
Products: Book Papers

HUNTON FIBER AS
Niels Ødegaards gate 8
2815 Gjøvik, Norway
Tel: +47 61 13 47 00 Fax: +47 61 13 47 10
Website: http://en.hunton.no
Products: Wood Panel

HUNTONIT AS
Vennesla, West-Agder, Norway
Tel: +47 38 13 71 00 Fax: +47 38 13 71 81
Website: http://huntonit.com
Products: Wet-Laid Fibreboard

NORDIC PAPER GREÅKER
P.O. Box 155
NO-1720 Greåker, Norway
Tel: +47 69 13 85 00 Fax: +47 69 14 11 02
Website: www.nordic-paper.com
Products: Greaseproof and Kraft Papers

NORSKE SKOG
Saugbrugs, N-1756 Halden, Norway
Tel.: +47 69 17 40 00 Fax: +47 69 17 43 30
Website: www.norskeskog.com
Products: SC Magazine Papers

NORSKE SKOG
Skogn, Sjøvegen 108, N-7620 Skogn, Norway
Tel.: +47 74 08 70 00 Fax: +47 74 08 71 09
Website: www.norskeskog.com
Products: Newsprint and Improved Newsprint

PETERSON PACKAGING AS RANHEIM
Peder Myhre Veg 19, P. B. 8643, 7452 Trondheim
Tel: +47 815 30 444 Fax: +47 73 57 75 01
Website: www.petersonpackaging.no
Products: CCM and Solid Board Grades

RYGENE-SMITH & THOMMESEN A/S
Sandbergveien 3, N-4821 Rykene, Norway
Tel: +47 37 05 84 00 Fax: +47 37 05 84 03
Website: www.rygene.no
Products: TMP Pulp

VAJDA-PAPIR SCANDINAVIA AS
Nedre Eiker vei 48, N-3045 Drammen
Tel: +47 (32) 80 95 00 Fax: +47 (32) 83 22 12
Website: http://vajdapapir.hu
Products: Tissue

Research Organisations/Departments in Norway

NORDIC FOREST RESEARCH (SNS)
c/o Jonas Rönnberg and Inga Bödeker
Southern Swedish Forest Research Centre
Swedish University of Agricultural Science (SLU)
Box 49, 230 53 Alnarp, Sverige
Website: www.nordicforestresearch.org
(The secretariat rotates between the Nordic countries and lies with Sweden for 2014-2017)

NORSK TRETEKNISK INSTITUTT
P.O Box 113 Blindern, N-0314 Oslo, Norway
Tel: +47 988 53 333
Website: www.treteknisk.no
(Norwegian Institute of Wood Technology)

NORWEGIAN UNIVERSITY OF LIFE SCIENCES
Department of Ecology and Natural Resource Management
P.O.Box 5003, NO-1432 Aas, Norway
Tel: +47 64 96 58 00 Fax: +47 64 96 58 01
Website: www.umb.no

NORWEGIAN UNIVERSITY OF SCIENCE AND TECHNOLOGY (NTNU)
NO-7491 Trondheim, Norway
Tel: +47 73 59 40 30 Fax: +47 73 59 40 80
Website: www.ntnu.edu
(Department of Chemical Engineering)
(Centre for Renewable Energy – SFFE)
(Bioenergy Innovation Centre)

PAPER AND FIBRE RESEARCH INSTITUTE (PFI)
Høgskoleringen 6b, NO-7491 Trondheim, Norway
Tel: +47 73 60 50 65 Fax: +47 73 55 09 99
Website: www.pfi.no
(Subsidiary of Innventia AB)

SKOG OG LANDSKAP
P.O.Box 115, 1431 Ås, Norway
Tel: +47 64 948 000 Fax +47 64 948 001
Website: www.skogoglandskap.no
(Norwegian Forest and Landscape Institute)

Mills in the Middle East Region

BAHRAIN

OLAYAN KIMBERLY-CLARK (BAHRAIN) W.L.L.
Askar, Ti
www.olayan.com

IRAN

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

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

HAYAT KIMYA
Zencan, Ti

IRAN OSB
Tehran, OSB
www.iranosb.com

IRAN PAPYRUS CO. LTD.
Saveh, Bo
www.iranpapyrus.com

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

LATIF PAPER CO.
Hashtgerd, Ti

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

PARS PAPER INDUSTRIAL GROUP
Haft Tappeh, P&W
www.icerli.com/parspaper.htm

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

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

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

SUGAR CANE & BY-PRODUCTS DEVELOPMENT COMMERCIAL CO.
Shoeybieh, MDF
www.iran-sugar.com

IRAQ

STATE COMPANY FOR PAPER INDUSTRIES
Basra, Pa / P&W / Ti
www.paperiraq.com

STATE COMPANY FOR PAPER INDUSTRIES
Mesan, Bo / Pa / Sa / MP
www.paperiraq.com

ISRAEL

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

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

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

JORDAN

AL-KEENA HYGIENIC PAPER MILL CO. LTD.
Amman, Ti
www.alkeena.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

MILLENIUM PAPER
Al Zarka, Ti

SPECIALIZED INDUSTRIES GROUP
Amman, NW
www.spic-nonwovens.com

KUWAIT

AL OULA PAPER MANUFACTURING CO.
Shuaiba, Pa

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

UNITED PAPER
Shuaiba, Pa / Sa

LEBANON

HENRY MOLDED PRODUCTS INC.
Lebanon, MP
http://molded-fiber.henrymolded.com

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 SOCIETE LIBANAISE DE CARTON S.A.L.
Sin El Fil, Bo / Pa

UNIPAK TISSUE MILL
Halat, Ti
www.unipak-tissue-mill.com

QATAR

AL SUWIDI PAPER FACTORY
Doha, Pa

SAUDI ARABIA

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

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

MIDDLE EAST PAPER CO. (MEPCO)
Jeddah, Pa
www.middleeastpaper.com

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

SAUDI PAPER MANUFACTURING CO.
Dammam, Ti
www.saudipaper.com/en

SYRIA

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

ORIENTAL PAPER
Lanatex, Damascus

PULP AND PAPER MILL
Dayr az Zawr

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

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

THE MEDITERRANEAN MILLS
Jableh, Ti

THE SYRIAN CARTON FACTORY
Charife Bross, Damascus

UNITED ARAB EMIRATES

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

AL JAZEERA PAPER MILL L.L.C.
Uum Al Qwain, Pa

CROWN PAPER MILLS
Ajman, Ti
www.crownpapermill.com

EMIRATES PAPER MILL
Jebel Ali Dubai, Ti

GULF PAPER MANUFACTURING FREE ZONE CO. (GPMFZCO)
Jebel Ali, CB / Pa
www.gulfpaper.com/GPMFZCO.htm

PREMIER PAPER MILL L.L.C.
Uum Al Qwain, Pa

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

UNION PAPER MILL
Dubai, CB / Pa
www.upm.ae

PRODUCT KEY	
PANEL	OSB (Oriented Strand Board)
	PB (Particle Board)
	MDF (Medium Density Fibreboard)
PAPER	Bo (Board)
	CB (Core Board)
	Fi (Fine)
	Kr (Kraft)
	Ne (Newsprint)
	Pa (Packaging)
	P&W (Printing & Writings)
	Re (Recycled – various)
	Sa (Sack)
	Se (Security)
	Ti (Tissue)
PULP	Pu (fibre)
OTHER	MP (Moulded Pulp)
	NW (Nonwoven)

Mills in the Eastern European Region

Excluding Russian Federation; Including: Greece, Latvia, Lithuania, Estonia

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

BELARUS

AAT SVIETLOGORSKI CELIULOZNO-KARTONNY KOMBINAT
Svietlogorsk, Pa
www.sckk.by

BOARD MILL RAYEVKA OAO
Rayevka, Bo / Pa
www.bellesbumprom.by

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

KRASNAYA ZVEZDA PAPER MILL JSC
Chashniki, Pa
www.1886red-star.by

KROVLYA JV JSC
Osipovichi, Bo

OLKHOVKA BOARD MILL JSC
Olkhovka, Bo
www.bellesbumprom.by

PAPER MILL OF GOZNAK
Borisov, Fi / P&W / Pa
www.goznakpaperby.com

PROMMASH IMPORT BORISOVDREV
Borisov, MDF

PUKHOVICH BOARD MILL JSC
Svetly Bor, Bo
www.karton.by

SLONIM BOARD & PAPER MILL ALBERTIN JSC
Slonim, Bo / Pa / Ti

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

BOSNIA AND HERZEGOVINA

MEDIAPAN BUSOVA.A.
Busovaca, MDF

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.net

BULGARIA

ALFA WOOD
Varna, PB
www.alfawood.gr

BELOVO PAPER MILL S.A.
Belovo, Hy / Ti
www.zeritis.gr/belana

DUROPACK TRAKIA PAPIR AD
Pazardzhik, Pa
www.duropack.at

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

ISKAR JSC PAPER FACTORY
Sofia, Bo / Pa / P&W / Wa

KOSTENETS-HHI S.A.
Kostenets, Pa / Ti / Wa

KRONOSPAN BULGARIA EOOD
Bourgas, OSB
www.kronospan.bg

LESILHART LTD
Silistra, Pu (wood)

MAYR-MELNHOF NIKOPOL AD
Nikopol, Bo
www.mm-karton.com

MONDI STAMBOLIJSKI EAD
Stamboliyski, Pa
www.mondigroup.com

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

TEHART AD
Mizia, Pa / P&W / Pu (wood)

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

CROATIA

BELISCE D.D.
Belišće, Pa / Pu (wood)
www.belisce.hr

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

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

BRNENSKE PAPIRNY S.P.
Tišnov, Pa
www.papirny-tisnov.cz

BRNENSKE PAPIRNY S.P.
Doubravník, Bo

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

D D LUKAVEC
Lukavec, MDF

DUROPACK BUPAK OBALY A.S.
České Budějovice, Bo / Pa
www.duropack.cz

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

GRENA A.S.
Veselinad Luzniki, MDF

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

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

KORONA LOCHOVICE SPOL. S R.O.
Lochovice, Bo
www.korona-lochovice.cz

KRKONOSSKE PAPIRNY A.S.
Hostinné, Fi / Pa / P&W / Sp

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

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

NEOGRAPH A.S.
Štětí, Se / Sp
www.neograph.cz

OLSANSKE PAPIRNY A.S.
Jindřichov u Šumperka, P&W / Sp

OLSANSKE PAPIRNY A.S.
Ruda nad Moravou, Fi / P&W/ Sp

OLSANSKE PAPIRNY A.S.
Zábřeh, Pa / Re

OP PAPIRNA S.R.O., DELFORTGROUP
Olšany u Šumperka, Th / Sp
www.delfortgroup.com

OTROKOVICKE PAPIRNY A.S.
Otrokovice, Bo
www.papirny.otrokovice.cz

PAPIRNY BELA A.S.
Bělá pod Bezdězem, Bo / Pa
www.papirny-bela.cz

PAPOS V.O.S.
Ostrov nad Ohří, Sp
www.papos.cz

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

SMURFIT KAPPA CZECH S.R.O. ZAVOD MORAVA PAPER
Hradec nad Moravicí, Pa
www.smurfitkappa.cz

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

ESTONIA

EESTI VANAPABER OÜ
Tartu, MP
www.eestivanapaber.ee

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

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

RAEPINA'S PAPER FACTORY INC.
Räpina, Fi / Pa
www.rappin.ee

GEORGIA

INGURSKIY ZELLYULOZNO-BUMAZHNY KOMBINAT
Zugdidi, Fi / Pa / P&W

TBILISI PAPER PLANT
Tbilisi, Fi

GREECE

ALFA WOOD
Grevena, MDF
www.alfawood.gr

ALFA WOOD
Larissa, MDF
www.alfawood.gr

ATHENS PAPERMILL S.A.
Drama, Bo / P&W
www.boltongroup.net

ATHENS PAPERMILL S.A.
Piraeus, P&W / Ti
www.boltongroup.net

FTHIOTIS PAPER MILL S.A., PIREUS MILL
Moskhatón, Bo
www.fthiotis.com.gr

HERCULES PACKAGING CO S.A.
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	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)	