PITA ANNUAL REVIEW

2016-2017

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

Annual Review
2016-2017

Compiled by the PITA Office

PITA
Paper Industry Technical Association

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Paper Industry Technical Association

Annual Review 2016-2017

Contents listing

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Chairman's Message

(Given at the PITA AGM, Red House Hotel, Ramsbottom, Bury, 1 December 2016)

As I look back, 2016 has been quite a momentous year for a number of reasons. In June we had the Brexit Referendum and a result which was unexpected; then Mr Trump was elected to become the next President of the United States. We certainly 'live in interesting times': nobody knows what will happen with Brexit, and how it will affect the way businesses operate in the future; nevertheless it will obviously have a profound effect, as has the devaluation of the Pound – not only on companies and individuals, but also on Associations such as ours. Meanwhile, the paper industry has been affected by the changing landscape caused by globalisation, and it will be interesting to see how it will cope going forwards, particularly with Mr Trump announcing his intention to push a more 'protectionist' America and to dismantle some of the existing international trade agreements.

In terms of mega-events for the year, they surpass all others, but it is also worth looking at some of the smaller events. For example, as regards sport in the UK we had major success in both the Olympics and Paralympics; I was in China soon after the Olympics and even the Chinese had to admit we had beaten them. Our Financial Director is a Scot, so it is also important to mention the success of the Murray family – both Andy and brother Jamie – who have both gained the coveted top slot in their respective tennis groupings.

Moving closer to home, we should also look at what has happened to PITA during 2016, because again in many ways it has also been a momentous year. Back in July we held our first full conference in almost a decade. As a delegate and a speaker, I felt it was a very successful event, and as today shows, we have broken the ice and are starting to re-establish meetings on subjects people want to hear and attend. By organising seminars, workshops and similar gatherings we are allowing parts of the industry to re-engage and come together, using PITA as a vehicle to get communication going again.

Also this year we re-launched the PITA website, which is increasingly being developed to make it a source of vital information for the Industry. After an absence of some time, Barry in particular needs to be congratulated on getting the service reinstated.

In addition, one of our directors, John Kirby, has also been instrumental in progressing our PITA Development Forum, in which all the directors have been participating, as part of which we have been engaging in one-to-one discussions with various senior level managers in our industry. The aim has been to investigate how PITA can work with both mills and suppliers and look for opportunities to develop PITA's offering internationally.

At this point I would like to acknowledge the efforts of all involved with PITA in implementing these changes. So I would like to formally record my appreciation of the PITA Staff – Barry, Daven, Graham and Helen – who work behind the scenes producing the magazine, organising events, sorting membership and administration issues, and generally making the Association work.

Looking to the future of the Industry, a lot has been talked about the bio-economy. Greater recycling will remain with us going forward, and I think also, that cellulose as a feedstock for so many other industries – not just nano- and micro- cellulose, but also for general chemical raw materials to manufacture 'green products' as is increasingly being demanded by customers, will continue. Indeed, many UK universities are now researching cellulose chemistry. So we hope that as this continues, more paper companies will encompass a broader remit and look at the wider aspects of cellulose use, not just for paper manufacture.

Another aspect to consider is the area of paper products. For example, we all know about the general decline in graphical products. Personally, I have done a lot of work with graphical paper mills who have looked at opportunities for converting to packaging or specialities. The danger today is with so many companies looking at packaging as an alternative, it is predicted that we could end up with over-capacity in that sector, leading to the same issues we have faced with graphical grades, but at the moment there continues to be plenty of scope for conversions.

Since the Association has to operate in this changing world, it too has to change, not least because so many mills have closed and the pool from which we draw our membership has shrunk accordingly. So we now serve a smaller and leaner group, which means we ourselves must similarly be leaner and more proactive. This has been a driver in the updating of the Memoranda and Articles of Association which has been necessary to serve the Association going forwards. That, coupled with the various initiatives to contain costs and drive down expenditure, means PITA is in a stronger position for the foreseeable future. With that I close my report and look forward to a positive outcome for 2017 as regards our Industry and Association.

Graham Moore

PITA & Brexit

On 23rd June 2016, the majority of the population of the United Kingdom made the momentous decision to leave the European Union after 43 years of membership and, as this year's PITA Annual Review was being prepared, negotiators on both sides were preparing to discuss the terms of that exit and the UK's future relationship with remaining EU Member states. No doubt much time will be spent and ink will be spilled over coming months discussing the future arrangements.

That said, those at the heart of PITA feel that the Technical Expertise, skills, and camaraderie that typifies our industry transcend geographical, national and political boundaries and we will continue to work with and serve our members, colleagues and friends around the World for the benefit of the Fibrous Forest Products industry everywhere, as we have done for nearly 100 years.

PITA Board

2016-2017

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

2015-2016

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

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	
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PITA Office/Paper Technology

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PITA Office

Helen Dolan
Company Secretary
PITA Office

Daven Chamberlain
Editor
Paper Technology

Graham Sutton
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Paper Technology

The Paper Industry Gold Medal

Call for Nominations

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

A Brief Background:

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

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

The Future of the Medal:

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

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

How to Nominate Someone:

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

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

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

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

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

What about the Winner of the Gold Medal?

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

For Further Information:

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

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Tereos

Hawkins Wright Symposium Nov. 2016 (LONDON)

Daven Chamberlain
Editor, Paper Technology

The annual highlight of London Pulp Week remains the Hawkins Wright Symposium, once more held in the main hall of the Royal College of Surgeons. Again registrations exceeded 300, and the number of countries represented rose to 33, with participants coming quite literally from the four corners of the globe.

Continuing high attendance brings a guarantee of sponsorship, and the list of companies willing to support the event remains high, with only a couple dropping out from last year and one new entry: **AkzoNobel**; **Altri**; **April**; **Cenibra**; **CMPC**; **Ekman; Fibre United** (representing **UPM** and **Canfor**); **Fibria**; **Fr. Meyer's Sohn**; **Gearbulk**; **Ilim**; **Itochu**; **Mercer Pulp**; **Metsä**; **Omya**; **Södra**; **Storaenso**; and **Valmet**.

James Kynge (Financial Times)

This year's event started with the inevitable presentation of economics, in particular what is happening in China. Given the Chinese economy was booming until recently, James laid out his predictions for what will happen going forwards, which it must be said were formulated before the announcement of Donald Trump's victory in the US Presidential Election. The world may change somewhat with his election, but as yet it is hard to predict how; in the meantime, with this presentation we go back to a period before the Trump victory to discuss China.

According to the speaker, very little is likely to occur in the country until the end of 2017, when the 19th Party Congress takes place. China prides itself upon stability, and while it is becoming increasingly obvious that hard decisions will have to be made about controlling the economy, these are likely to be shelved until after the Congress, when new members can execute some key reforms, such as kerbing over-capacity in the old economy.

In last year's report of the HW Symposium, the stagnation of the manufacturing sector (0% growth) was noted. Since then the heavy industrial sectors have bounced back and shown growth of (currently) around 7%; meanwhile the consumer sector is booming at around 17%. Property sales have also been strong this year, as the government has allowed this sector to imbibe the loose money floating in the economy, although sales are forecast to decline in 2017, in part due to spiralling house prices.

Part of what the new leadership will have to contend with is how to stimulate the Chinese economy going forwards. The basic strategy is likely to involve preventing the burgeoning debt getting out of hand while managing the transition to a consumer driven service led economy; but don't expect changes any time soon given the overarching political cycle that controls everything in the country – the cogs turn rather slowly.

Walter Schalka (Suzano)

This presentation focussed on the concept of 'success', in particular financial success, and the indices used for its measurement. Walter used his presentation to describe the economic reality of pulp production in Brazil. Demand for hardwood pulp is growing, but new capacity is being added in an undisciplined fashion, leading to overcapacity, low prices and low capital returns. In addition, the newer projects are getting larger and larger, so each new mill creates massive disruption.

Many financiers are using EBITA as a measure of financial health in the industry. Walter gave some generalised figures for the Net Mill Cost ($417/t) Cash Cost ($190/t) and SGA Expenses ($54/t). Subtracting Cash and SGA from the Net Mill value leaves around $170/t, or an apparently healthy EBITA of 42% (170/417). However this is a rather notional figure, and nowhere describes the actual return on investment (ROI); taking into account Sustaining Capex ($105/t) and Tax ($49/t) leaves a true return of $19/t or ROI of 4.5% (19/417). Given this relatively derisive return alongside the vast sums involved in establishing a new mega-pulp mill, it would appear this is a practical example of what Oscar Wilde termed 'the triumph of hope over experience'.

In order to enhance returns Suzano has identified four possible growth areas to pursue: Genetic Modification; Lignin isolation; production of hardwood 'fluff' grades (EucaFluff) which can be used as partial (maybe 40%) substitution for the more expensive softwood fibres; and production of speciality tissue grades. Diversification into higher value added areas is seen as necessary to stabilise returns given the volatility of the pulp market.

Amar Singh Mehta (JK Paper)

India (1.3 bn) is the second most populated country in the world, after China (1.4 bn), but with a birth rate that means it should exceed its neighbour in around a decade. Currently, 40% of the Indian population does not touch paper as part of their daily life, and the *per capita* consumption was reportedly only 11kg in 2014. The literacy rate is officially around 66%, but of these, some 30% barely read or have access to books or newspapers. Current Government plans are to raise the literacy rate to 94% in the next 5 years – if this occurs, the vast increase in people needing and wanting access to paper is going to cause a massive boost to the indigenous paper industry.

It is against this backdrop that figures from Pöyry predict 4.1%/a growth through to 2030 in India – almost twice that for any other country. In addition to the education initiative, demand drivers for this include: economic and income growth; population growth (changing demographics – urbanisation, young population); rapidly changing (aspirational) lifestyles; improving living standards; growth in organised retail creating demand for better quality packaging of FMCG products; rising healthcare spends; increasing preference for ready-to-eat foods; and it is predicted the 'Make in India' program will further boost demand for locally-produced Packaging.

Unsurprisingly, packaging grades (CCM and carton) are forecast to show greatest growth as regards tonnage, while tissue, currently a minority product, will see best percentage growth (forecast 13.5%/y). In addition, P&W grades also look to have a healthy future, with predicted growth of 2-3%/y up to 2030. One reason for the strong performance for grades such as newsprint is that as people reach retirement age, they tend to move from urban to rural areas, where reading of newspapers becomes part of the established daily routine. Altogether, should the predictions come to pass, *per capita* consumption is set to rise to around 18kg by 2030 – still way behind that common for developed countries (the EU average was 156kg in 2014, while that for USA was 224kg) or the current global average of 55kg.

A snapshot of the Indian industry shows around 700 mills employing 400,000 directly, and near four times that indirectly, with a turnover of Rs 500bn. The current composition of 31% (wood based), 22% (agri-based) and 47% (recycled) is predicted to change in the next decade to 28% (wood), 19% (agri) and 53% (recycled), as production ramps up from the current 15MT to 25MT by 2030 (*Figure 1*).

However, although there are obvious opportunities these come with some challenges, namely: access to fibrous raw materials; age and efficiency of current equipment; high energy costs; and the current zero import duty from ASEAN. As regards access to fibre (something we have covered several times in our ***Letter from India*** column), the industry is making approaches to the Government to be given access to a portion of the 29Mha of degraded forest in India, which could be leased for pulp production. Should this prove successful, that will go some way to achieving the required increase in wood pulp needed for growth, but the major portion is almost certainly going to come from market pulp produced externally to India, and from imported recovered PfR.

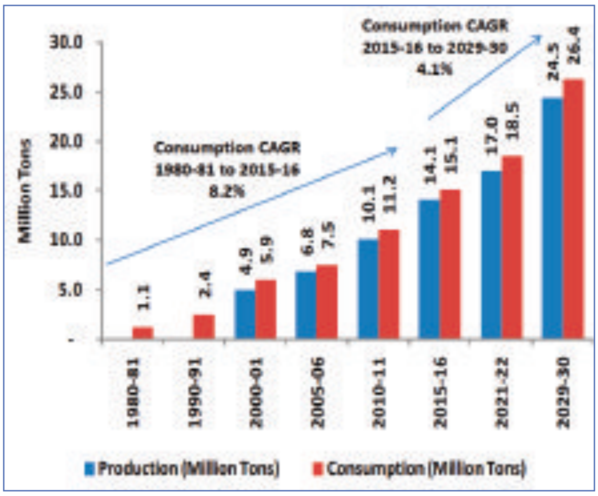


Figure 1: Chart showing current and projected production and consumption of paper in India to 2030 (Source: Pöyry, Report of Working Group on Pulp and Paper)

Praveen Singhavi (APRIL)

Indonesia is the single largest economy in South East Asia. It has shown stable GDP growth (of around 3%) for several years, and the country has low unemployment. It is the fourth most populous country in the world, housing 255 million, of whom 45% live in rural areas and 11% are on the poverty line. Agriculture, Forestry and Fishing account for 13.5% of GDP, with Forestry products being a key part of value-added exports to the country's trading partners. Furthermore, plantation forestry in Indonesia is a very young industry, having commenced circa 1990.

Figure 2 shows the main statistics regarding Indonesia's forest landscape, along with the Government guidelines as regards acceptable use. APRIL controls around a million hectares, under half of which is farmed actively as plantation,

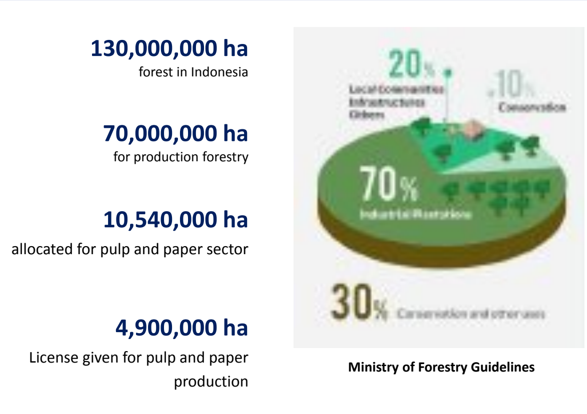


Figure 2: Graphic and text showing the extent of the Indonesian forestry industry, and Government guidelines for how it is to be managed

and almost a quarter of which is conserved and protected – which is well above the 'set-aside' requirement of 10%.

The challenge going forward it to increase productivity of the land, but maintain sustainability. Particular challenges include: complex regulations regarding land tenure, which are still evolving; the obligation to create livelihoods and social advancement; the onus to manage all aspects of a licence once granted, which includes community engagement, community settlement, infrastructure development etc; and the ever present problem of fire and haze.

APRIL has an independent Stakeholder Advisory Committee which advises and scrutinises the Group's implementation of its Sustainable Forestry Management Policy. It is chaired by a member of PEFC and includes academics and representatives from WWF and Greenpeace. KPMG audits and reports progress, which is published and available publically. Furthermore, an Independent Peat Expert Working Group (IPEWG) has been formed to further develop and implement best practices on peatland management and support government climate goals – this group includes UK academics.

APRIL operates a 'Production and Protection' model of forestry. The four key elements are: Reforest, by taking degraded land and turning it to managed plantation; Delineate and Protect to make sure conservation land remains undeveloped; Restore land to natural forest, where possible; and Engage and Enable communities for social and economic development. As part of this final element, the company has engaged with many villages over the last couple of years to encourage inhabitants to desist from the practice of using fire as an agricultural tool. APRIL is one of the founding members of the Fire-Free Alliance, which has seen a 90% drop in reported incidents since inception in 2013. Overall APRIL sees this multi-strand approach to targeted utilisation and protection of forest in Indonesia as leading to a successful and sustainable future for their business going forward.

Per Svending (Fiberlean Technologies Ltd)

Nanocellulose (NCC) and Micro-Fibrillated Cellulose (MFC) have both been the subject of significant research in recent years. North America has concentrated mainly on NCC, often the small fine 'whiskers' and microfilaments, while Europe seems to have settled upon MFC as the preferred product. In either case, the production route starts with pre-treatment of the lignocellulose using chemicals and/or enzymes, which is followed by mechanical and/or chemical treatment.

Fiberlean is a composite product made by mixing pulp fibre (either hardwood or softwood, although softwood is preferred) with a mineral before grinding. The result is small aggregates of filler and cellulose micro-filaments. When cellulose fibres and fillers are co-processed in aqueous suspension, minerals act as fine grinding media and reduce processing costs. The process is flexible in that it can use any paper filling mineral in the market, and the MFC content can be varied. Furthermore no chemical additives are required, and the production process yields a stable ready-to-use composite.

The resultant product tends to be at the coarse end of MFC, with a nominal width of 100nm and length equivalent to around 100μm. For economic reasons the process needs to be performed on-site at a mill, in order to minimise the cost of transporting low solids material. It is aimed both at companies wishing to increase filler content, and at those wanting to develop new applications. For instance, one trial has involved applying Fiberlean using a curtain coater after the wet-line of the wire of a linerboard machine, to make a low cost white top linerboard (*Figure 3*).

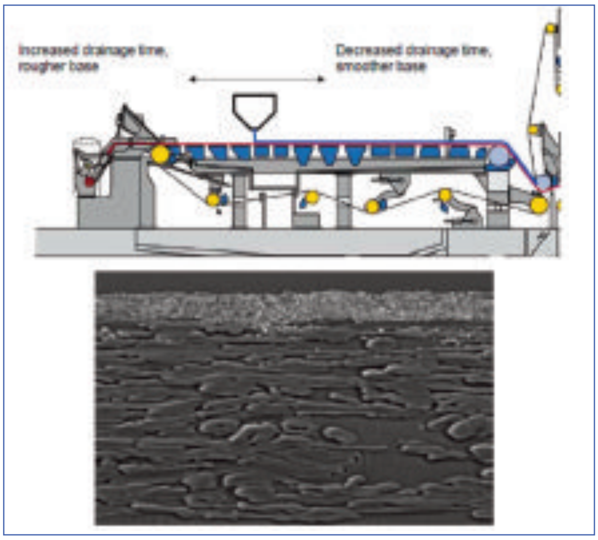


Figure 3: Graphic showing use of a curtain coater to apply Fiberlean on the wire during paper production, and a photomicrograph of the resulting product

Fiberlean obtained FDA approval in 2015, which has spurred interest from packaging companies. A Food Contact Notification allows for up to 5% Fiberlean MFC fibrils in packaging grades for food contact. Its use tends to lead to increases in strength and opacity as the relative filler content of the sheet rises; simultaneously porosity is decreased (quite significantly), and bulk is also reduced. Work is ongoing to see how to mitigate the sheet densification.

Commercial full scale use of MFC in the paper industry is now established and is forecast to grow – Fiberlean has an established capacity of 8kT (dry tonne MFC) – which is equivalent to 40kT dry tonne Fiberlean MFC – in two commercial plants and one pilot plant. In addition the prospects for Nanocellulose growth in fibre based packaging and in applications outside of Paper & Board are truly exciting. For the pulp industry, the growth of Nanocellulosics should be considered as an opportunity as it will lead to increased demand for pulp.

Tom Wright (Hawkins Wright)

The final talk was the standard tour de force delivered by one of the two main Hawkins Wright strategists on the Market Pulp Outlook. It was Tom's turn this year, and he started by showing how global paper and board production has been fairly flat, with the estimate for 2015 being 373MT – equivalent to that produced in 2007. Global paper pulp production will be lower in 2016 (around 167MT) than 2004. However, market pulp demand remains strong, and shipments grew by 1.4MT last year, and are set to rise by a similar level in 2016. It is China that continues to fuel this growth, with softwood demand particularly strong – caused by the expanding tissue sector, and increasing substitution of wood for annual fibre pulps which are slowly being phased out. (Straw is largely obsolete while bamboo continues to enjoy niche status).

China is also importing some paper-grade pulps which are being used by the burgeoning viscose industry; some mills take the paper grade versions (with higher levels of hemicellulose) and use then as a cheap extender alongside more expensive standard dissolving grades.

Outside of China, pulp demand is flat. Growth markets include India, Turkey, Middle East, East Europe and Latin America. With the exception of India, tissue drives demand. Contraction in P&W production is less of an issue in the integrated industries of Japan and North America, than in Europe. A silver lining for pulp demand may be the impact of very high recovery rates for P&R, which are tending to drive down quality and therefore yield, and causing some previous users of recycled paper to turn to virgin pulp.

Given all of the current turbulence in world politics, forecasting demand is very difficult. Projected capacity increases are shown in *Figure 4*, which indicate in particular the ramp-up of APP's OKI Mill in Indonesia in 2017/2018. Pulp production remains fragmented, seasonal and very dynamic. In the past five years we have witnessed around 9Mt/y of new greenfield capacity (incl. Eldorado, Maranhao, MdP, Guaiba II, Klabin), 2Mt/y closures, and 3Mt/y conversions. Despite understandable concerns regarding the OKI project, macro-economic fundamentals (Chinese economy, currency, US election, impact from Quantitative Easing, etc,) remain the dominant drivers in our business, and the outlook is highly uncertain – especially since Brexit and the US election result.

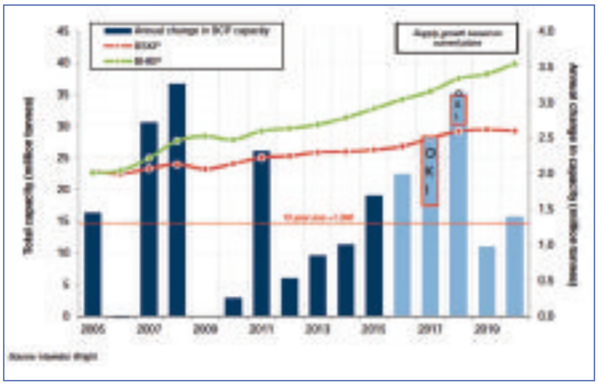


Figure 4: Market pulp capacity additions from 2005 to 2020 (Source: Hawkins Wright)

Energy Review 2016

Steve Freeman
Director of Environmental & Energy Affairs,
CPI

With cost being such a key issue for energy intensive papermaking, access to competitively priced and secure energy supplies is a prerequisite for the UK to be an attractive place to make paper. As with so many other aspects of UK life, the implications of the Brexit vote for the energy market are not yet clear. Much energy market regulation emanates from Europe and how these issues are resolved will shape the future of UK energy markets. Balancing climate change issues with affordability will be a real challenge; the globally unique UK domestic target to reduce emissions by at least 80% by 2050 remains unchanged by Brexit.

One side effect of the changed Government triggered by the Brexit vote is the restructuring of DECC and BIS into one single Department for Business, Energy and Industrial Strategy (BEIS), bringing climate change policy setting together with industrial policy. While early days for the new department, the promise of an Industrial Strategy suggests a more balanced approach between climate change and industrial policy.

For gas, prices are largely set by the international market, with the UK served by a combination of domestic production, Norwegian pipeline imports and LNG cargos delivered to various terminals. Global projections indicate relatively abundant supplies, meaning no supply reason for the lower than forecast cost to substantially change during the next few years, irrespective of how the UK's domestic fracking policy evolves.

While fracked gas has resulted in low prices in some regions, notably North America, this does not seem likely for Europe. Firstly, any local fracked gas would seem unlikely to offer sufficient volume to undercut the main market price and, secondly, imported LNG carries costs associated with liquefaction and transport, so the relatively higher gas price in Europe looks set to stay.

Several pipelines to the continental gas network provide links to a wider gas market, meaning supply issues from Russia only affect the UK indirectly. However, one issue of concern is the lack of storage facilities, highlighted by physical problems at the main UK storage facility (the Rough facility under the North Sea) where insertion and removal were constrained for a number of months. However, as Government expected, the continental interconnectors provided indirect access to overseas storage, minimising price disruptions, and so the real need for additional UK storage remains an open question.

By contrast, the outlook for grid supplied electricity is not so clear, with UK grid supply in the midst of transformation.

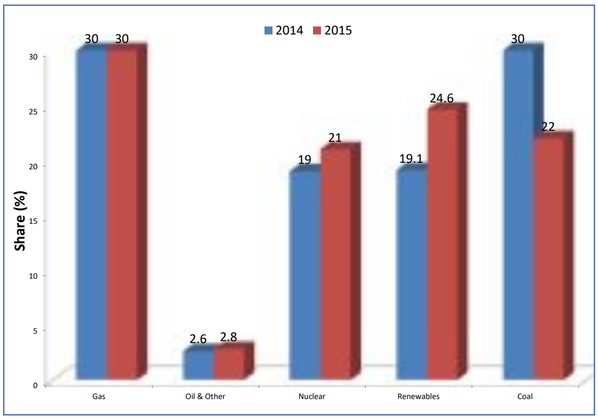
Coal generation has fallen away more quickly than expected, with older coal fired stations closing at an astonishing rate – a trip along the M62 through Yorkshire passes closed station after closed station. The Government is actively planning for all unabated coal power stations (so all UK coal power stations) to be closed by 2025. Replacement has been a combination of renewables (predominantly wind, solar and to a lesser extent biomass) and increasing imports from France. The autumn damage to several interconnector cables, caused by a dragging ship anchor during a storm, and the switch to export mode, driven by unscheduled French nuclear safety checks, highlights the risk of depending on imports and the importance of a diverse supply base.

With UK policies effectively ruling out a role for coal and coupled with an aging nuclear fleet, the need for cost effective new baseload generation is paramount; a need that is not met by a very expensive contract signed for new nuclear at Hinkley Point C. However, due to planning and construction issues, new nuclear cannot be delivered quickly, meaning gas is increasingly accepted as the one realistic technology that could deliver in the timeframe required and at a reasonable cost. An added bonus is that gas has an emission profile that works with the Committee on Climate Change's medium-term emissions reduction targets, providing space for lower carbon technologies to further develop and be deployed into the late 2030s.

A number of Government policies are in motion to address supply security, with Contracts for Difference and the Capacity Market working alongside the (soon to close to new applicants) Renewable Obligation to incentivise new, and support older, generation plant to remain available to support the grid. How the price settlements work out will be fundamental to the outlook for overall cost, as the cumulative impact of policies increases the non-energy component of bills. Government continues to shelter a number of energy intensive installations, including most paper mills, from some of these additional costs but there is general acceptance that retrospectively addressing issues is not the best way to go, and that delivered UK grid electricity cost remains higher than in many other locations. This long-term cost differential is a real barrier that needs to be overcome to win new UK investments.

As always, energy efficiency is the neglected policy strand, with the potential for reducing energy use still not being fully realised across the economy. In this area, the Paper Industry has a proud record, with UK papermaking reducing energy used per tonne of production by 45% since 1990. Further potential improvements identified through the 2050 Decarbonisation plan will no doubt be delivered, but maximum benefits will only be achieved with a supportive policy framework delivered through the Industrial Strategy.

As always, an exciting year lies ahead!



Share of UK Electricity Generation by Fuel 2014 & 2015. (Source: Digest of UK Energy Statistics (DUKES) 2016)

Environment Review 2016: Challenges & Opportunities

Debbie Stringer
Environment Manager,
CPI

Well, who would have thought it? In our review of 2015, and looking at the challenges ahead for 2016, we did not predict an exit from the European Union (EU)! The prospect of Brexit certainly impacts the sector, with many UK mills being subsidiaries of companies headquartered in Europe or further afield. With over 80% of environmental regulation having its roots in European law, this will certainly prove to be a key challenge, and indeed a potential opportunity, for 2016 and beyond.

But what does this mean on a practical level for current environmental concerns?

BREF/BAT AELs

Mills in England and Wales now have revised permits, with Scottish mills following suit in the coming months. Permits now reflect the requirement to work to Best Available Techniques (BAT) as defined by the BAT Conclusions in the latest (2014) Pulp & Paper BREF (BAT Reference Document). The permits also now contain the BAT Associated Emission Levels (BAT AELs) that mills are required to meet by 2018. The focus for the coming months, ahead of the September 2018 compliance deadline, is to work towards and ensure compliance. Many permits carry improvement conditions to aid such focus.

The requirement for mills to have permits stems from the Environmental Permitting Regulations (EPR) (and Scottish equivalent) which in turn implement the European Industrial Emissions Directive (IED). It is the IED that requires sector BREFs to be the reference for permits and the BAT AELs to be legally binding requirements in the permit. So, returning to the question "What does Brexit mean on a practical level?".

In the short term, "***Business as Usual***". The compliance deadline remains as we will still be in membership of the EU beyond that date, notwithstanding any triggering of exit. The regulations are domestic regulations so will continue beyond any Brexit through "The Great Repeal Act" when it comes to fruition. The unknown in the longer term is what happens when the sector BREF is revised again, currently scheduled for 2022. Assuming we are no longer EU members, at that point there will be no direct UK input into the revision. Do we stick with a reference document we cannot influence? Do we create a UK alternative? The main ethos behind the IED is to create a level playing field across Europe. Whilst remaining a little bumpy with variable Member State interpretation and implementation, it is making progress towards the level objective. So, a Challenge or an Opportunity? Do we go our own way and reinvent UK permitting? Could we simplify the process but with the potential for more stringent requirements being imposed or do we find a way to influence any BREF revision and argue for maintaining close ties with the IED and the level playing field? Food for thought for 2017…

For more information on these Key Challenges see:

- http://ec.europa.eu/environment/eussd/smgp/policy_footprint.htm
- http://ec.europa.eu/environment/ecolabel/
- https://www.gov.uk/government/publications/fire-prevention-plans-environmental-permits

or contact Debbie on dstringer@paper.org.uk

Water Resilience

Turning closer to home, issues around water scarcity and indeed water abundance abound.

Reform of the Abstraction Regime continues into 2017, with Defra and the Regulators in England and Wales struggling with the complexities of building a system to link abstraction limits to water availability whilst taking into account the very varied needs of multiple sector abstractors.

Opposite water scarcity, climate change raises the scenario of excess water with some mills experiencing unexpected flooding over the previous couple of years. The Environment Agency, together with the sector, produced a Climate Change Adaptation Guide which is available on CPI's website and provides guidance to mills on preparing for all eventualities associated with climate change, including both a dearth and abundance of water. Lessons learned from recent floods will go to updating the guidance in 2017.

Other Key Challenges

Amongst the ongoing issues, the following remain key for 2017:

- **Single Market for Green Products.** The development of a **single** methodology to calculate the **Product Environmental Footprint (PEF)** for products sold within and across the EU. Use of the footprint will be voluntary but if you use a footprint it must, ultimately, be this one. A pilot programme for developing and testing such a methodology is underway for intermediate paper products including graphics, tissue and packaging. Clearly a Brexit impact potential depending upon access to the Single Market, although European companies would likely manage any involvement in PEF centrally.
- **EU Ecolabel.** Again, a voluntary scheme but used by several CPI and PITA Members. The ecological criteria for paper products (including graphics, tissue and newsprint but not packaging) are being revised. Similar Brexit impact potential to PEF.
- **Fire Prevention Plan (FPP) Guidance**. Mill permits now carry a condition to the effect that a Fire Prevention Plan must be produced if requested by the Regulator. Whilst most mills are not being required to produce an FPP, where one is required the Guidance is impractical and cost-prohibitive. Discussions continue in order to arrive at acceptable alternatives to the Guidance prescriptions.

Notwithstanding all these issues, CPI continues to work closely with government and regulators, representing the sector's views in addressing challenges and seeking opportunities.

Wood-Based Panels Industry Review 2016

Marion Le Roy
Economic Adviser,
European Panel Federation

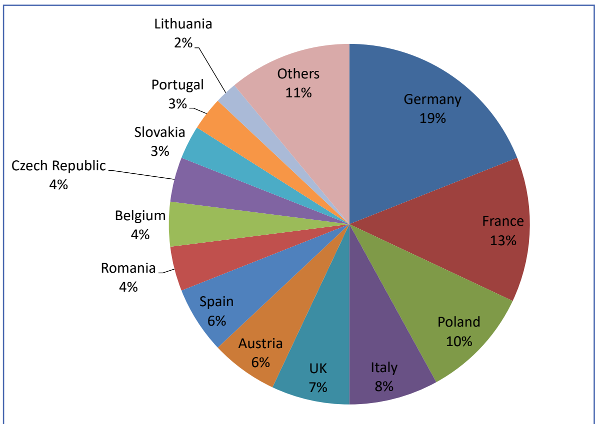
According to the figures drawn from the EPF Annual Report published in July - an extensive compilation of industry statistics collected by the federation – all wood-based panel types developed positively in 2015. The market for all wood-based panels registered a growth of 3% in 2015 in comparison with 2014 in terms of production volume.

Production (million m³)	Countries	2015	2014	2015 v 2014
Particleboard	EU28 + EFTA	29.1	28.7	1.5%
MDF	EU28 + EFTA	11.8	11.5	2.7%
OSB	EU28 + EFTA	5.0	4.8	3.9%
Hardboard	EU28 + EFTA	0.6	0.6	9.0%
Softboard	EU28 + EFTA	4.4	4.0	10.0%
Plywood	EU28 + CH	2.8	2.8	1.0%
TOTAL		53.8	52.4	3%

Following an upturn in 2014, the European **particleboard** production in the EPF member countries increased again by 1.5% to 29.1 million m³ in 2015, and easily exceeded the projection made last year (+0.5%).

In 2015, significant increases of output were noted in Iberia, where the recovery is continuing, Slovakia, Sweden, Slovenia, Latvia, Italy and the United Kingdom. On the other hand, production substantially declined in Estonia and continued to decrease in Greece, although at a much more moderate rate than before. Production also declined in large producing countries such as France, Germany and Austria.

Despite a slightly decreasing output, Germany remained the largest particleboard producing country in Europe with 5.53 million m³ in 2015, accounting for just under one fifth of the EU-EFTA production volume. France and Poland continued to complete the particleboard producers' podium. Italy and the United Kingdom completed the top 5 and the club of the producers of more than 2 million m³ of particleboard in 2015. Together, these five countries accounted for 57% of the total EU-EFTA production in 2015.



Breakdown of particleboard production by country in 2015

The European particleboard production capacity decreased by 3.9% in 2015 to 37.2 million m³. Some restructuring of capacities took place in Belgium, Bulgaria, Germany, Italy, Lithuania, Poland and Spain. The only capacity in place in Slovenia closed down in December 2015. The overall European particleboard production capacity is foreseen to increase marginally by 0.9% in 2016.

The expectations for 2016 are quite positive. The rise in production in the EU-EFTA area as a whole is estimated at +1.1% for 2016. This should result in a particleboard production around 29.4 million m³.

MDF production in Europe grew by 2.7% in 2015 reaching 11.8 million m³. With a stable output of about 3.6 million m³, Germany remains the largest European MDF producer in 2015 followed by Poland, Italy, France and the United Kingdom in decreasing order of importance. The joint output of these five countries accounted for a share of 72% in the overall European MDF production in 2015.

The European production capacity of MDF increased by 112,000 m³ in 2015, as a result of expansion in Poland and some downsizing in Czech Republic and Portugal. The total capacity amounted to a little less than 15 million m³ in 2015 and is expected to re-exceed this threshold in 2016.

European production of **OSB** rose by 3.9% in 2015 and exceeded 5 million m³. Germany and Romania have the largest European OSB production capacities. Following an expansion in 2015, Poland now completes the podium of OSB production countries, measured by capacity.

The European production capacity of OSB increased slightly in 2015 to 6 million m³. If investments in Belgium, Hungary and Ireland are confirmed and implemented, production capacity could approach, in 2016, and then exceed, in 2017, the 6.5 million m³ mark following investments in the United Kingdom. Further, new projects have been announced to take place in Russia, Belarus and, perhaps, Turkey, which could lead to a capacity surplus in the near to medium term.

In 2015, the production of **hardboard** in Europe increased by 9% compared to 2014 reaching 616,000 m³. Total EU28 and EFTA installed production capacity for hardboard amounted to 803,000 m³ in 2015. The main European producer is Poland, followed by France and Bulgaria.

For the fourth year in a row, the European production of **softboard** increased. In 2015, output rose by 10% compared to 2014, exceeding the 4 million m³ threshold. Rigid softboard accounted for 65% of the output and flex softboard for 35%. The installed production capacity for rigid softboard decreased slightly to 3.5 million m³ in 2015 and the production capacity for flex softboard to 1.85 million m³. For both softboard types, Poland, France and Germany are the main producers in Europe. Poland has the highest capacity for rigid softboards, whereas France is the leader in flexible softboards.

In 2015, the EU28 and Switzerland **plywood** production increased by 1% in comparison with 2014 and amounted to 2.8 million m³. The European output including Russia and Ukraine rose by 1.4% to 6.6 million m³. In 2016 production is expected to increase by 3.5% and 2.9% for the EU28 and Switzerland and Europe respectively. Russia is the largest European producer of plywood with an output amounting to 55% of the European plywood production in 2015. Finland holds the second position with a share of 17% of the European output in 2015.

According to EPF's economic review, the industry is guardedly optimistic about the future, predicting stable to good outlooks in all markets. This is supported by slow but steady economic recovery according to latest economic indicators available in November 2016.

Tissue Review 2016

Pirkko Petäjä
Principal Consultant,
Pöyry Management Consulting

Tissue market development in Europe

The European tissue market has grown quite steadily, except for the decline during the recession in 2009. The Western European business had a long double dip regression but showed good recovery especially in 2015; moderate growth is expected to continue. Investments are moving forward, especially briskly in selected regions (Iberian Peninsula.) Eastern European tissue recovered the recession much faster but during 2015 it has clearly suffered from the Ukrainian crisis and these problems are still continuing. Tissue demand in Europe (excl. Russia) until 2025 is expected to grow 2.1%/a driven by Eastern European (excl. Russia) growth at an annual rate of 4.4%, while Western European growth is expected to continue at a rather modest pace of 1.6%/a. The Central Eastern European countries are not very much impacted by the Russian Ukrainian conflict. Also in Russia the weak Ruble has helped the market; overcapacity has eased off with less import and more export; local demand growth has, however, been very slow.

North America: M&A and AfH focus

The economic growth is rather strong in North America and the tissue market continues to grow. Interesting is the brisk M&A activity and even European players have made acquisitions (SCA and Sofidel) and continue with strong organic growth. Technology developments are forthcoming.

The strong economy has boosted especially the AfH market segment. Private label growth has stagnated and is no longer following a similar trend as before.

Investments focus on new/premium technologies (especially TAD and NTT). Mergers and acquisitions have focused on AfH and private label retail tissue segments and further consolidated the tissue markets.

Latin America: characterised by instability and recession

In Latin America the economic deceleration and recession is seen for instance in Argentina and Brazil. In Venezuela the situation is desperate with repositioning of brands and government controlled prices. K-C is suspending operations in Venezuela as no prospects for improvement are in sight. In the countries where GDP growth is positive it has been cut down to half. Consumers are reacting and private label is increasing. Continuous challenges include inflation in Argentina, unemployment in Brazil and economic malaise in the whole region. Mexico has a little better situation and the market growth exceeds that of Brazil, the former regional leader in growth.

MENA tissue growth has almost recovered

Political turbulence in the MENA region lowered the average growth in the recent past, but now the tissue market growth is returning to its former path. Iran, Iraq and Syria are expected to have the highest relative growth rates, provided the political turmoil will not worsen. The average regional growth is now somewhat over 6%/a, while it was a couple of percentage points higher a few years ago.

Slower growth in Asia, especially China, but China is still leading the global growth

Asia, especially China, continues to lead the global tissue market growth despite the economic turbulence and substantial tissue market growth slowdown. Tissue growth in China used to average some 8%/a over the last decade. In the last couple of years the growth has significantly slowed down, only 2015 was a better year than expected. In the future, Chinese growth is expected to slow down significantly. Longer term capex plans are, however, still ambitious causing closure of old uncompetitive capacity, change of geographic focus and increased pressure for exports. Consequently the tissue capacity in China is moving inland from the coast and now the largest companies focus upon overseas export.

New generation of tissue entry

Some new entrants are motivated by push or decline of their current businesses such as smaller pulp mills losing their competitiveness and integrating to tissue, or graphic paper sites looking for new opportunity due to their declining market.

Independent tissue converters tend to add base paper production as the typical business model in tissue is integrated base paper and converting or at least own base paper production in the company. Margins are normally higher for base paper integrated producers as the concept has many cost benefits and the producer is also stronger and less vulnerable with own base paper.

Financial, Private Equity buyers are currently rather active in the tissue sector and they make base paper additions possible, enable consolidation moves etc. They are another new type of entrant.

Consolidation

Despite a lot of new entrants and increasing fragmentation a clear trend in tissue is consolidation. To have good economic result a company must focus on one or a few markets and be strong and dominant there rather than spread out to as many markets as possible. For example, SCA by focusing on Europe shows higher and more sustainable financial performance than what it reached before the strategic European acquisitions.

European tissue business will continue to consolidate. There is room for consolidation especially in Southern and Eastern Europe.

New technologies breaking through

The new structured tissue machines and other technological innovations are clearly a forthcoming trend; there are 5-6 new textured tissue machines (mostly NTT) coming on stream in North America in addition to 4 new TAD machines; also a couple of new NTT machines are being built in Europe. Investments have focus on technology innovations.

Newsprint Review 2016

Riku Kallio
Senior Consultant
Pöyry Management Consulting

Last year's article largely discussed the struggles that the newsprint producers are facing due to increasing fibre costs and low margins. The challenges have not changed significantly during 2016. This article gives an overview of the key trends seen in the UK and wider Newsprint industry recently.

The UK Supply and Demand

From the UK Newsprint industry point of view the positive sign is that after recent capacity closures the capacity utilisation rates in the remaining paper machines should be high (this is also what the statistics indicate, see *Figure 1*) and hence the potential to maximise the performance of the two UK mills should be good.

However, the newsprint demand trend is not very positive. When looking at the final statistics for the UK Newsprint demand in 2015 (these were not yet available when writing this article in 2016) it seems that following the capacity closures in the UK, the demand for Newsprint was also down ~9% compared to 2014 (although the demand in the UK and the UK capacity are not necessarily strongly interlinked). This is a relatively large change – following more stable demand in 2012-2014. The longer term trend (2005-2015) indicates –7.3% annual demand decline.

Although the numbers seem gloomy this is perhaps not surprising for anyone in the industry. The *status quo* for producers is (and has been for many years) to maximise competitiveness rather than hope for sudden positive shifts in the demand trends. A weakened GBP gives the UK manufacturers some competitive advantage in the European markets particularly when considering that the local availability of raw material (News&PAMs) in the UK is good and hence the cost base is not necessarily as sensitive to exchange rate developments. As such the short term outlook for the UK newsprint mills can be considered positive.

Figure 1: The UK Newsprint capacity, production and demand

Key challenges

Fibre costs and Newsprint price developments are critical factors in the financial performance of newsprint producers. As illustrated in *Figure 2* the trend here is not very favourable. The gap between newsprint and News&PAMs prices has converged over the last ~5 years. Although the longer term trend is perhaps not declining quite as much, the current situation is relatively weak and means tight margins. The key considerations here are:

1. Generally sluggish global economy (and increased uncertainty) means lower adspend and weaker paper demand (intensifying the demand decline that is coming from competition from electronic media).
2. Although the weak economy has also driven relatively low virgin pulp (BHKP) prices, the RCP prices have not declined at the same pace – other end uses such as tissue and packaging production also have a noteworthy impact on the "deinking grade" RCP demand and prices.

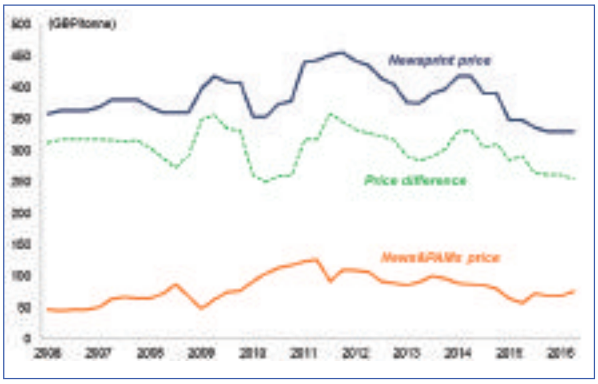


Figure 2: Newsprint and News&PAMs price development

Industry structures

The European newsprint industry is still relatively fragmented. There are over 15 newsprint producers and the top 3 and 5 producers' market shares are 50% and 68% respectively. This means a more fragmented production base than in the other mechanical graphics papers (SC and LWC). Woodfree paper production is even more fragmented but on the other hand there is also more room for specialisation than in Newsprint.

A fragmented industry structure is not necessarily ideal for the capacity management, which is crucial for the industry future and performance. Closures and conversions to other grades (mainly packaging) may well take place also in the coming years but it will remain to be seen whether this leads to significant changes in the industry structures, and whether the potential consolidation would actually lead to desired improvements in the industry profitability.

The challenges are not only impacting the newsprint sector but are more widespread, covering the wider publication paper segment (SC, LWC etc). In the industry where the larger paper producers produce many different grades the consolidation attempts require complex strategic considerations. These considerations can be very different for a larger group with many different assets than for a smaller company whose existence depends on a "single asset". For the financial investors the potential to gain cost savings is often the key driver for investment considerations – regardless of continuing performance improvement efforts the potential here can still be significant.

The recent developments across the global political environment have certainly increased the uncertainty over global trade and overall market dynamics. It would not be wrong to say that this is also the case in the Newsprint industry – it appears that the only thing we can be fully sure of is the continuing uncertainty in the coming years.

European Containerboard and Corrugated Board Review 2016

Outti Juntti,
Senior Principal,
Pöyry Management Consulting Oy

Steady market growth continues

Firm and favourable are the words one could well use to characterise the European containerboard and corrugated board market in 2016. The demand kept on growing steadily and each quarter was better than the previous one as compared to 2015. For the time being market information is available for only the first nine months, but it indicates a robust growth of around 3 per cent for the year 2016 as a whole. On individual market level Central and Eastern European countries were again demonstrating the strongest progress, but very positive development was seen also in many Western European market like Spain, Italy and the UK, where manufacturing started to pick-up during the second quartile. French packaging market continued to suffer from stagnating private consumption and it was the only one making the exception to the rather sunny year to the European corrugated industry.

Industry restructuring continues and newcomers are entering the business

Positive market outlook of packaging particularly when compared to graphic paper segment and in many cases rather reasonable investment needs and capital expenditure on machinery have been attracting conversions from printing & writing paper production to containerboard.

In 2016 this trend continued as even more intense than during the previous years. In Italy Pro-Gest's conversion project in Mantova, which is an old newsprint mill acquired from Burgo, proceeded to execution phase and a new machine was ordered in March. Production is announced to start in the first half of 2018. In August Heinzel published plans for the conversion project in their Laakirchen mill in Austria which was approved by the supervisory boards of the company; thus PM10 will change production from SC-paper to recycled containerboard and create a significant new player in Central European markets.

The US headquartered International Paper has so far been involved only in corrugated board production in Europe but made a decision to start producing containerboard as well. Their acquisition of Holmen's newsprint mill in Madrid became effective in July and IP is going to convert the magazine paper machine into recycled containerboard.

LEIPA's plans in Schwedt, Germany, moved forward in April 2016 when the company acquired the newsprint mill from UPM next to its own existing site. The former PM11 will be converted into white-top testliner production and will thus become Leipa's PM5.

Furthermore during 2016 both Mondi and Stora Enso have announced that they are investigating expansion opportunities at their mills in Slovakia and Poland respectively, whilst Prinzhorn is pondering location for a new machine either in Germany and Turkey. All these three potential new machines would come on stream in 2019-2020.

All in all these investments will create a significant further addition to the European containerboard capacity, which in 2016 already increased by some million tonnes. The largest start-ups were Eco Paper's new machine in Romania and Parenco's conversion in the Netherlands.

At the same time that new containerboard capacity is being added the European industry continues heading towards higher integration level between containerboard and corrugated board production. The leading players have been active in acquisition front in 2016, too. DS Smith kept on expanding in corrugated converting and made no fewer than five acquisitions and opened a new state-of-the art display and consumer packaging plant in Germany.

Mondi acquired Polish corrugated company SIMET and thus strengthened its position as the largest producer in the country. Furthermore it made an expansion in Russia and acquired Beepak in October. Prinzhorn has expressed its focus on Central and Eastern Europe, too; in 2016 the company became active in the Mediterranean area and took over corrugated companies in Greece and Turkey.

Smurfit Kappa's focus continued to be in the Americas where it made a deal on two Californian based corrugated sheet companies in March. Acquisition of two Brazilian companies with both containerboard and corrugated board production was finalised in January.

These actions demonstrate clearly companies' tendency not only to integrate containerboard and corrugate board businesses but also expand power in the corrugated value chain and the businesses or geographies that are already or will targeting to become their focus areas. As an industry wide phenomenon this can be seen as a desire to fortify role and position of corrugated and hopefully improve overall profitability of the business.

Another avenue for fortifying position in the value chain and role as a strategic supplier to brand owners to traditional corrugated companies has been expansion to other materials and solutions. Many of the leading corrugated producers have entered plastic packaging during the past five years. Spanish SAICA started diversification into flexible packaging last year and acquired Polipol in its home country. In 2016 it moved further by acquiring two companies in Italy and the UK.

	Total Companies	Total Plants	Average Grammage
Austria	7	9	477
Czech Republic	7	10	490
France	17	62	523
Germany	44	124	519
Hungary	8	10	487
Italy	52	81	561
Norway	3	3	476
Poland	37	50	503
Romania	10	11	484
Spain	69	87	544
Sweden	4	11	488
Switzerland	6	8	517
Turkey	103	132	512
United Kingdom	28	68	437
TOTAL EUROPE	395	666	515*
(*weighted average)			

Basic Statistics of European Corrugated Industry
(Source FEFCO – includes non-member data)

Kieran Rafferty Awarded PITA Insignia

We are delighted to announce that Kieran Rafferty, Director of Rakem Ltd and former Director and National Chairman of PITA, has been awarded the PITA Insignia for services to the Association. His nomination for the award read as follows:

Kieran first became involved with PITA when he attended Northern District meetings with his father Frank Rafferty. He quickly realised the benefits of belonging to an Association like PITA and being the person he was, wanted to put something into the Association as well as just enjoying the benefits of being a regular member. In addition to attending Northern District meetings, Kieran put himself forward to become a member of the Coating Working Group where he could make a real contribution bearing in mind his field of expertise in coating pigments. In addition to offering his technical expertise, he also played a major role in the organisation of the highly successful Coating Conferences and seminars.

The business acumen that Kieran demonstrated as a member of the Coating Working Group led to him being appointed as a member of the PITA Board of Directors in 2003 where he again made a major contribution providing excellent support to the then PITA Chief Executive. He was appointed Deputy Chairman of the Association in 2006 and during his two years in that role because of what was happening in the Association during that period played a much more active role than would normally be expected of a Deputy Chairman. He subsequently became Chairman of the Association in 2008 and paved the way for the renaissance that PITA has enjoyed over the past few years. Kieran remained on the PITA Board for a further four years before standing down as the decline of coating mills in the UK has pulled him in a different direction, along a different path to the Association, as he develops new business opportunities for the family business. That said, he is unlikely to be far from the Paper Industry, as his Daughter is now responsible for the businesses interests in the Paper sector.

Not content with the contribution he was making to both the PITA Board and to the Coating Working Group where he was taking increasing responsibility to support the Group Chairman Kieran also served on the Northern District Committee to support the activities in that area for a period of years.

The contribution that Kieran Rafferty has made to the Association is immense and goes well beyond that of "Meritorious Service" and for that reason, I have no hesitation in nominating Kieran Rafferty for the award of the PITA Insignia. Without such contributions, PITA would not survive.

We plan to present Kieran with his award early in the new year.

Industry Statistics 2015

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

2015 – Summary

This was the most devastating 12 month period for the UK paper manufacturing sector for around a decade. During the year we lost UPM Shotton PM1 (215kt); Aylesford Newsprint (400kt); Tullis Russell Markinch (100kt); Whatman Springfield (ca. 5kt); SCA Stubbins PM1 (undisclosed tonnage); and DS Smith Wansbrough (180kt) - in total over 900kt of capacity. However, because closures were phased over the course of the year (with Wansbrough occurring just before Christmas), and with Smurfit Kappa Townsend Hook's new machine ramping up production, the tonnage drop shown in the chart opposite is nearer 500kt; so the full effect of this devastation will not become clear until statistics for 2016 are issued.

The knock-on effect regarding employment was similarly damaging, being (in round terms): Shotton (120); Aylesford (230); Tullis Russell (500); Whatman (unknown but small); SCA (30); DS Smith (180); and De La Rue Overton announced 30 redundancies mid-year – making a grand total of well over 1000 skilled and valued colleagues leaving our industry during 2015.

2016 – Preliminary Assessment

After such a tumultuous period, it is tempting to say 2016 has been (at least to the time of writing) reassuring 'dull' – certainly as regards mill and machine closures and redundancies. However, from a political perspective it has been anything but dull, with the UK voting for Brexit, which has caused waves throughout the world's financial and political systems. The value of the pound has fallen around 20%, making our exports cheaper, but imports more expensive. Since most UK mills using virgin fibre import the commodity, as they do the majority of papermaking chemicals, costs are being incurred that are directly attributable to the change in the value of sterling.

Aside from Brexit, James Cropper installed high quality moulded fibre production during the year, which they unveiled at Packaging Innovations in London during September. Although small scale in terms of tonnage, it nevertheless adds a further string to the bow of this innovative high-end paper producer.

The UK replaced the paper £5 note with a polymer version in September; this was the start of a roll-out that will see the £10 paper note replaced by a polymer version in Summer 2017, and the £20 paper note similarly replaced by 2020. The effect on tonnage of paper produced by De La Rue at their Overton mill is unknown – as you might expect, the company does not release such information – however, this cannot be seen as 'good news' for their paper manufacturing operation.

Finally, there were a couple of changes of ownership: Innovia sold their Cellophane operation in Wigton to Futamura Group; and St Cuthberts Paper Mill was purchased by Fabbrica Italiana Lapis ed Affini.

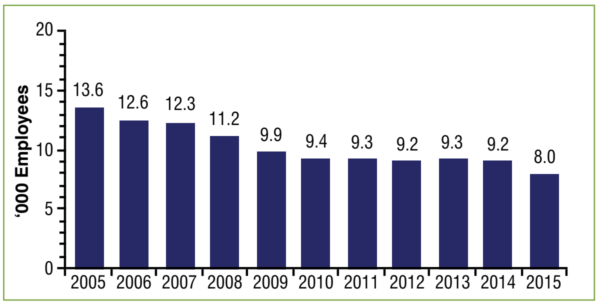
2017 – Preview

The most significant event next year is likely to be Brexit negotiations, which will be initiated during Quarter One; we wait to see how they will affect the paper industry going forward, but turbulent times are anticipated as the politicians battle over terms.

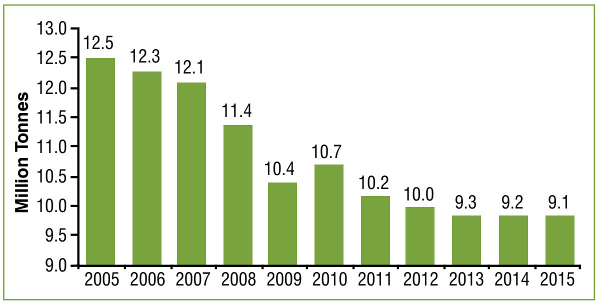
Daven Chamberlain, Editor, Paper Technology

UK Data (CPI/HM Revenue & Customs)

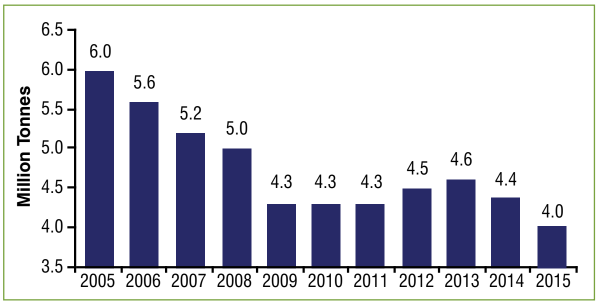
Numbers Employed in the Paper Industry 2005-2015



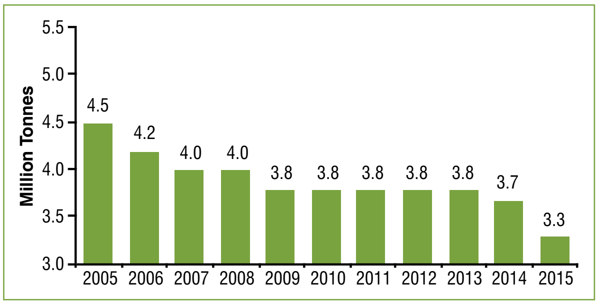
UK Consumption of Paper and Board 2005-2015



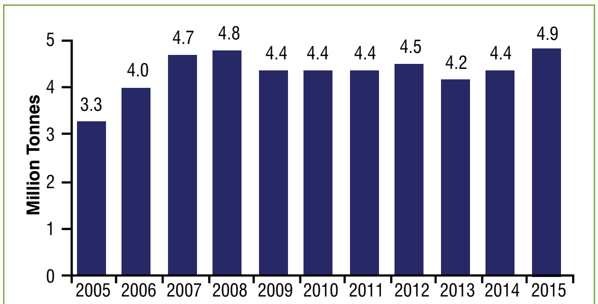
UK Production of Paper and Board 2005-2015



Recovered Paper Usage in UK Papermaking 2005-2015

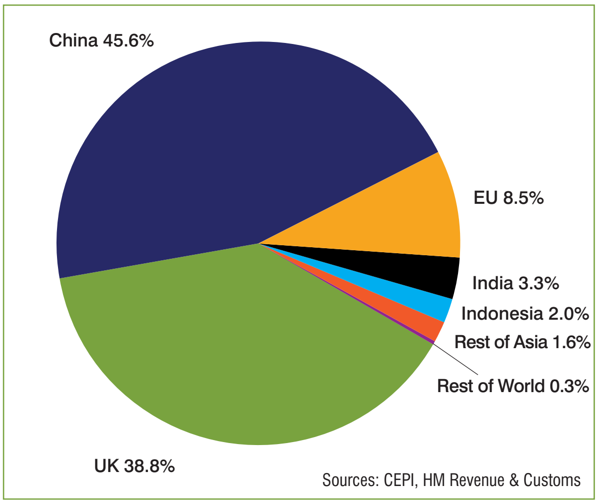


Recovered Paper Exports 2005-2015

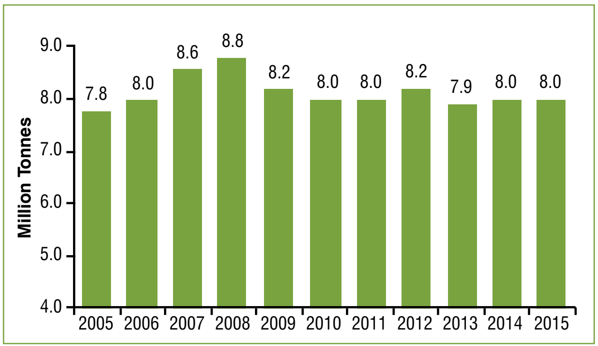


Source: HM Revenue & Customs

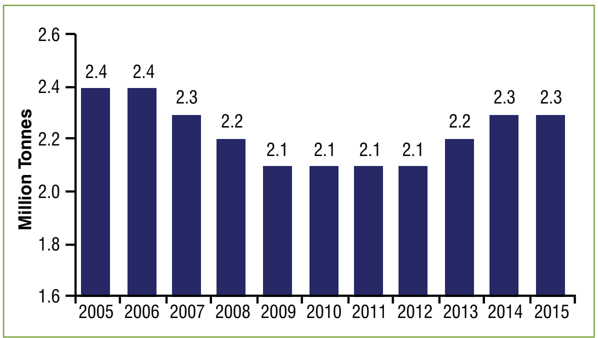
Recovered Paper Markets 2015



Recovered Paper Collection 2005-2015



Consumption of Paper by Corrugators 2005-2015



Production of Corrugated Boxes 2005-2015

Industry Facts 2015

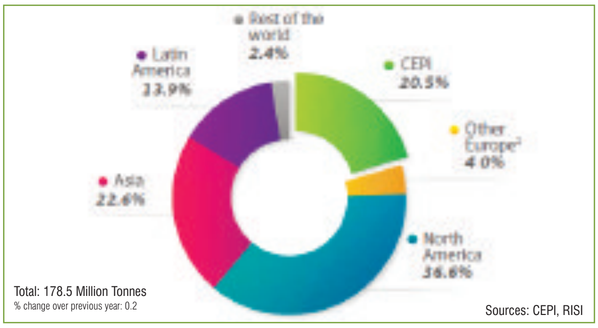
CPI Member Companies	66
CPI Member Employees	22,000
Paper & Board Production* ('000 Tonnes)	3,969.9
Corrugated Production (Million Sq. Metres)	3,729.7
Recovered Paper Collection ('000 Tonnes)	7,976.9
Tissue Parent Reel Production ('000 Tonnes)	772.0

** includes parent reel production*

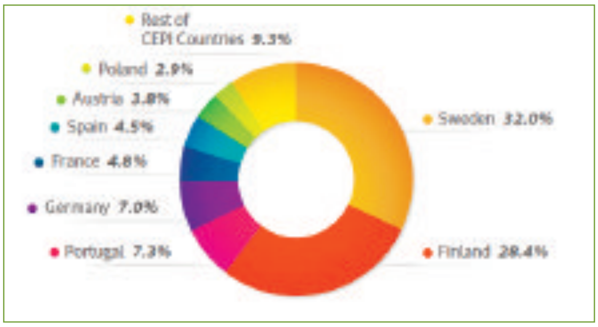
European Data (CEPI)

Pulp – Global View

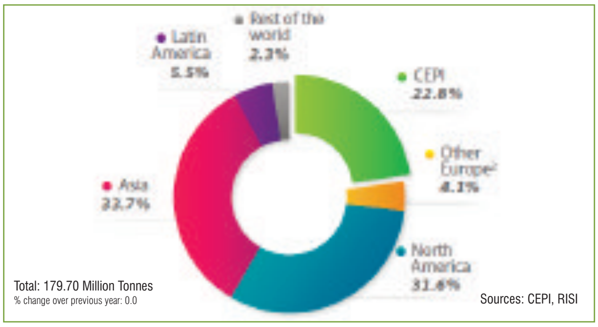
Pulp Production by Region in 2014



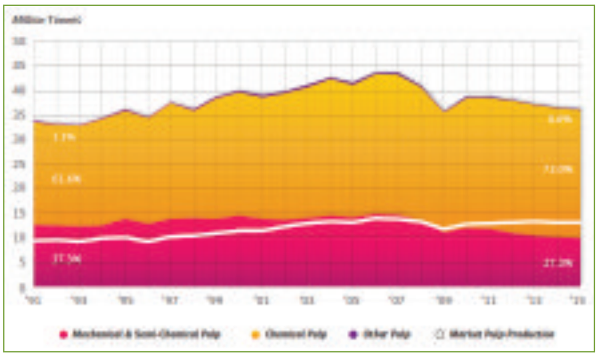
Pulp Production by CEPI Country in 2015



Pulp Consumption by Region in 2014



Pulp Consumption by Grade CEPI Countries in 1991-2015



Pulp

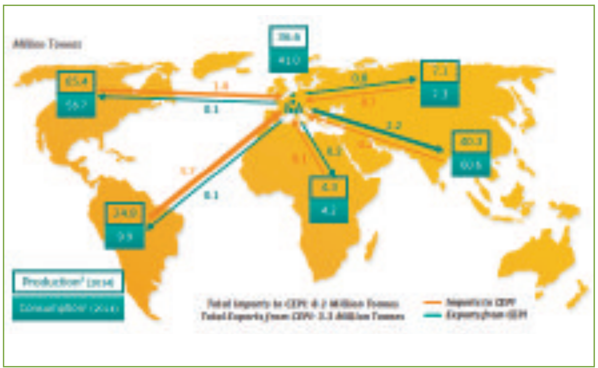
CEPI Exports of Pulp to Other Regions 2000-2015

000 Tonnes	2000	2005	2010	2014	**2015**	% Share of Total	% Change 2015/2014
Other Europe	724	674	719	824	**769**	23.4	-6.7
North America	104	187	62	46	**59**	1.8	28.7
Latin America	6	20	49	75	**70**	2.1	-6.5
Asia	412	1,076	1,595	2,232	**2,159**	65.6	-3.2
Rest of the World	86	114	142	140	**235**	7.1	67.6
Total	**1,332**	**2,071**	**2,567**	**3,317**	**3,292**	**100.0**	**-0.7**

CEPI Imports of Pulp from Other Regions 2000-2015

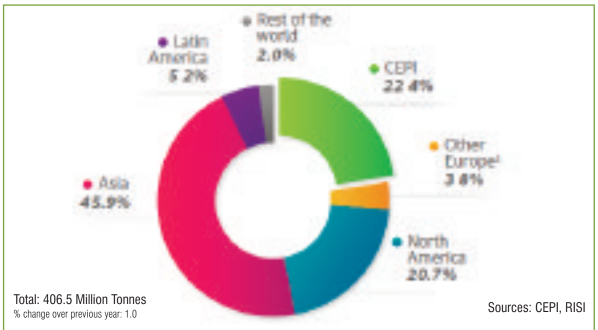
000 Tonnes	2000	2005	2010	2014	**2015**	% Share of Total	% Change 2015/2014
Other Europe	657	615	480	612	**658**	8.1	7.4
North America	4,623	3,891	2,292	1,569	**1,421**	17.5	-9.4
Latin America	1,916	2,825	4,733	5,373	**5,681**	70.0	5.7
Asia	272	197	134	99	**219**	2.7	120.9
Rest of the World	456	433	81	83	**135**	1.7	62.4
Total	**7,924**	**7,961**	**7,721**	**7,736**	**8,115**	**100.0**	**4.9**

Trade Flows of Pulp to and from CEPI Countries in 2015

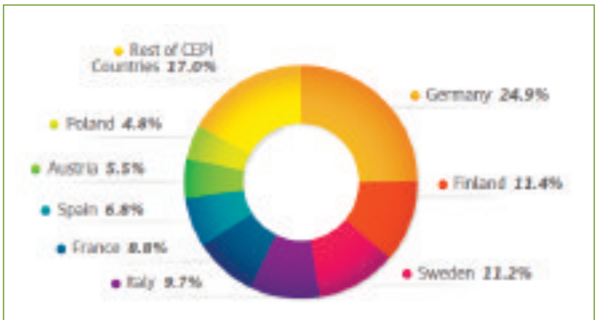


Paper – Global View

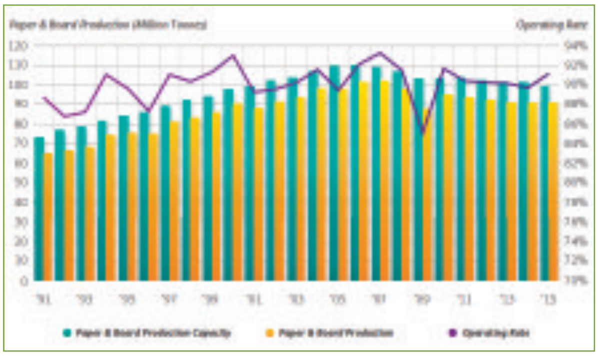
Paper & Board Production by Region in 2014



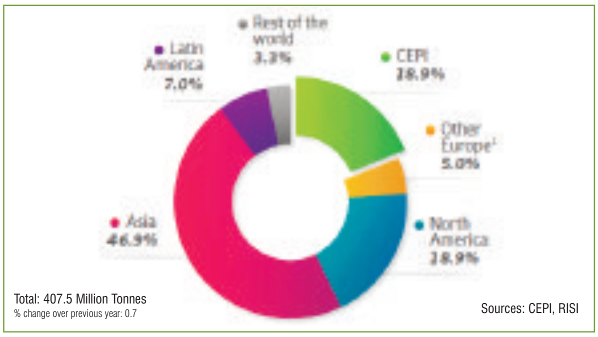
Paper & Board Production by CEPI Country in 2015



Paper & Board Production and Consumption in CEPI Countries 1991-2015



Paper & Board Consumption by Region in 2014



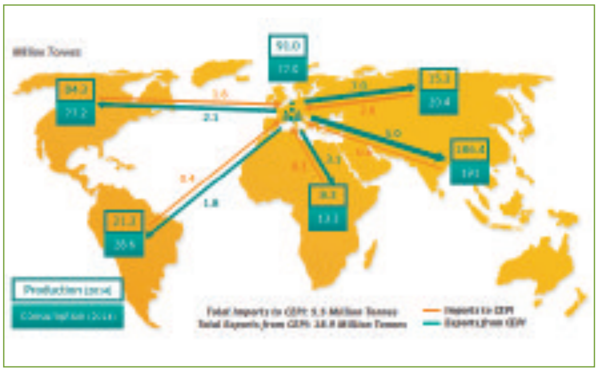
CEPI Exports of Paper & Board to Other Regions 2000-2015

000 Tonnes	2000	2005	2010	2014	**2015**	% Share of Total	% Change 2015/2014
Other Europe	6,090	6,825	7,349	7,179	**7,001**	37.0	-2.5
North America	2,283	2,802	2,055	1,943	**2,060**	10.9	6.0
Latin America	874	1,194	1,879	1,765	**1,801**	9.5	2.1
Asia	2,933	4,742	5,099	5,174	**4,966**	26.3	-4.0
Rest of the World	1,707	2,229	2,783	3,064	**3,087**	16.3	0.8
Total	**13,887**	**17,793**	**19,164**	**19,125**	**18,915**	**100.0**	**-1.1**

CEPI Imports of Paper & Board from Other Regions 2000-2015

000 Tonnes	2000	2005	2010	2014	**2015**	% Share of Total	% Change 2015/2014
Other Europe	3,318	2,727	2,525	2,371	**2,623**	48.1	10.6
North America	2,191	1,915	1,829	1,504	**1,622**	29.7	7.8
Latin America	198	498	498	360	**363**	6.6	0.7
Asia	332	394	625	590	**577**	10.6	-2.1
Rest of the World	344	369	307	310	**274**	5.0	-11.6
Total	**6,383**	**5,903**	**5,783**	**5,135**	**5,459**	**100.0**	**6.3**

Trade Flows of Paper & Board to and from CEPI Countries in 2015



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Tel: +33 1 45 62 11 91. Fax: +33 1 45 63 53 09.

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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Fax: +43-1-588-86-222.
e.mail: Theresa.bernhart@austropapier.at
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Chairman: Christian Skilich
Manager: Gabriele Herzog & Yvonne Groiss

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e.mail: jan.gojny@upce.cz or papir.tisk@csvts.cz
Year of Foundation: 1969
Chairman: Jan Gojný
Secretary: Ludmila Belicová

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e.mail: antti.lindqvist@papereng.fi
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Chairman: Janne Ussa
President: Antti Lindqvist

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General Secretary: D. Gomez
Vice Président: Jean Ducom

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Year and Place of Foundation: 1905 Berlin
Chairman: Dipl.-Ing. (FH) Xaver Weig
Executive Director: Petra Hanke

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e.mail:info@pita.co.uk
website: www.pita.co.uk
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Chairman: Graham Moore
Chief Executive: Barry Read

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Managing Director: Sandor Pesti
Chairman: Daniel Panyi
President: Laszlo Gyurina

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President: Furio Azzopardo

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Chairman: Rolf Hauge
Administrative Secretary: Irene Skjefstad

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Chairman: Maciej Kunda
General Director: Janusz Turski

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e.mail: info@tecnicelpa.com
Year and Place of Foundation: 1980, Tomar
General Assembly President: Carlos Fernando Pedro dos Santos
Directive Board President: Pedro Miguel Costa Matos Silva

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Secretary: Metka Severkar

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e.mail: info@spci.se
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Chairman: Ulf Eliasson
Executive Director: Marina Asp

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Web: www.appita.com.au
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Executive Director: Adele Elice-Invaso

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Executive Director: Darcio Berni

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e.mail: ghay@paptac.ca
Web: www.paptac.ca
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Executive Director: Grégoire Hay
Chairman: Robert Dufresne

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Web: www.atcp.cl
Year of Foundation: 1972
President: Andrés Mellado
General Secretary: Juan Carlos Silva

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Year of Foundation: 1964
President: Chen Xuezhong
Secretary General: Cao Chunyu

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

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CPPRI Campus, PO Box No 47, Saharanpur-247001 (U.P.), India.
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Year of Foundation: 1964
President: Neehar Aggarwal
Chief Operating Officer: Neehar Aggarwal

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

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Year of Foundation: 1967
President: Hak Lae Lee

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Executive Director: Lynne Askew
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Web: www.twntappi.org.tw
President: Yun-Chuan Ku

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Web: www.tappi.org
Year of Foundation: 1915
President: Larry Montague
Chairman: Chris Luettgen

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La Asociación Venezolana de productores de Pulpa, Papel y Cartón
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Year of Foundation: around 1985
President: Erasmo Jiménez

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G

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H

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Website: www.heimbach.com
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J

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K

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

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

M

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

N

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

P

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

Q

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

R

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

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

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

S

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

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

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

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

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

SPRAYING SYSTEMS LTD
Spray Nozzles
Farnham Business Park, Weydon Lane, Farnham, Surrey, GU10 8QT
Tel: 07711 972830
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

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

U

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

V

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

Paper, Pulp & Coating Mills in the UK

AHLSTROM CHIRNSIDE LTD

1

CHIRNSIDE PAPER MILL
Chirnside, Duns, Berwickshire, TD11 3JW
Tel: 01890-818303
www.ahlstrom.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
http://frogmoremill.com
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: 01884-836300
www.higherkings.co.uk
Products: Recycled coloured paper and board

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: 01256-771990
www.delarue.com
Products: Banknote, Security

11

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

12

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

FOURSTONES PAPER MILL CO LTD

14

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

15

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

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

FUTAMURA CHEMICAL UK LTD
Wigton, Cumbria, CA7 9BG
Tel: 01697-341212
www.futamuracellulose.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 4QS
Tel: 01229-495000
www.kimberly-clark.com
Products: Tissue

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

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

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

25 LENZING FIBERS GRIMSBY LTD
Energy Park Way, Grimsby, DN31 2TT
Tel: 01472-244700
www.lenzing.com
Products: Lyocell fibre (40,000tpy) from wood pulp

NORTHWOOD TISSUE LTD

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

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

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

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

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 4PL
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

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

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)

CONTACT DETAILS FOR RELEVANT NATIONAL GROUPS / ASSOCIATIONS

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

Panel Board Mills in UK & Ireland

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

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

56 **KRONOSPAN LTD (particle & MDF)**
Holyhead Road, Chirk, Wrexham, LL14 5NT
Tel: 01691-773361
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)**
South Molton, Devon, EX36 4HP
Tel: 01769-572991
www.norbord.co.uk

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

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

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

Moulded Pulp Mills in the UK & Ireland

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

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

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

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

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

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

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

Map of the Mills in the UK & Ireland

Key to entries

- Paper Mill
- Panel Board Mill
- Moulded Pulp Mill

Mills in the Benelux Region

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

N22 **ARJOWIGGINS SECURITY B.V.**
Usine de VHP, 7339 GS Ugchelen
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

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

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

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

N18 **D.S. SMITH PAPER** – De Hoop Mill
Harderwijkerweg 41, 6961 GH Eerbeek
Tel: +31 (0)313 - 67 79 22
www.dssmith-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 B.V.**
Noorderstraat 394, 9611 AW Sappemeer
Tel.: +31 (0)598 - 31 89 11
www.eska.com

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

N27 **HUHTAMAKI NEDERLAND B.V.**
Zuidelijke Industrieweg 3-7, 8801 JB Franeker,
Tel: +31 (0)517 - 39 93 99
www.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 **ECOPLA BOOMPLATEN**
Vaucampslaan 84, 1654 Huizingen
Tel: +32 (0)23 56 57 89
http://boomplaten.be

L1 **KRONOSPAN LUXEMBOURG S.A. (OSB, MDF)**
Z.I. Gadderscheier, B.P. 109, L - 4902 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 SG Arnhem
Tel: +31 (0)263 - 57 61 11
www.openluchtmuseum.nl

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

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

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

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

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

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

Map of the Mills in the Benelux Region

CONTACT DETAILS FOR SELECTED EUROPEAN GROUPS / ASSOCIATIONS

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

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

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

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

B9 **SAPPI LANAKEN N.V.**
Montaigneweg 2, 3620 Lanaken
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www.sappi.com

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www.sca.com

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www.smurfitkappa.com

N11 **SOLIDUS SOLUTIONS BOARD B.V.**
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http://solidus-solutions.com

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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
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E info@vnp.nl
http://vnp.nl
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www.olayan.com

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www.golrang.com

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www.ariansina.com

ARTA DECOR
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www.artagroup.com

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www.chouka.com

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HARIR KHUZESTAN CO.
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www.iranosb.com

IRAN PAPYRUS CO. LTD.
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www.isofam.ir

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www.kpmpaper.com

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www.latifpaper.ir

PARS HAYAT PRODUCTION CO.
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www.hayat.com

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http://parsneopan.com

PARS PAPER INDUSTRIAL GROUP
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www.icerli.com/parspaper.htm

MAZANDARAN WOOD AND PAPER INDUSTRIES
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http://en.mazpaper.com

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

SANAYE CHOOBE KHAZAR CO.
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www.choobekhazar.com

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www.iran-sugar.com

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www.hadera-paper.co.il/en

HARTMANN-MAI LTD.
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www.hartmann.dk

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www.nuqultissue.com

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UNITED PAPER
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www.saffoury.com

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Abu Dhabi, Hand

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Uum Al Qwain, CB / Pa
www.uaqpaper.ae

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www.upm.ae

PRODUCT KEY – see p48

Mills in Norway

ARBOR-HATTFJELLDAL AS
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 6, 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
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Website: http://forestia.com
Products: Particleboard

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Website: www.hellefoss.com
Products: Book Papers

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Website: http://en.hunton.no
Products: Wood Panel

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Website: http://huntonit.com
Products: Wet-Laid Fibreboard

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Products: TMP

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Products: Newsprint and Improved Newsprint

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Website: www.petersonpackaging.no
Products: CCM and Solid Board Grades

RYGENE-SMITH & THOMMESEN A/S
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Website: www.rygene.no
Products: TMP Pulp

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Nedre Eiker vei 48, N-3045 Drammen, Norway
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 Mimmi Blomquist
Southern Swedish Forest Research Centre
Swedish University of Agricultural Science (SLU)
Box 49, 230 53 Alnarp, Sweden
Website: www.nordicforestresearch.org

NORSK TRETEKNISK INSTITUTT
P.O Box 113 Blindern, N-0314 Oslo, Norway
Tel: +47 98 85 33 33 Fax: +47 22 60 42 91
Website: www.treteknisk.no

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

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Tel: +47 73 41 20 50
Website: www.ntnu.edu

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www.borisovdrev.by

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www.natron-hayat.ba

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www.alfawood.gr

DS SMITH
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www.dssmith.com

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http://fazerles.com

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www.jip.cz

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www.korona.cz

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www.delfortgroup.com

PAPIRNY BELA A.S.
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www.papirny-bela.cz

PAPOS V.O.S.
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www.papos.cz

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www.spm.cz

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www.tridas-pulp.cz

ESTONIA

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www.estoniancell.ee

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www.horizon.ee

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www.rappin.ee

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Dunaújváros, La / Pu (TMP)
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PULP CONCEPT KFT.
Budapest, MP
http://pulpconcept.com

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www.swisskrono.hu

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Warszawa, Se
www.pwpw.pl

PPHU ROLLS SP. Z O.O.
Włocławek, Hy / Ti
www.rollspap.com.pl

PRZEDSIEBIORSTWO EKOLOGICZNE BCD
Boruszowice, Pa / Re / Sa
www.domator-holding.com.pl

SCHUMACHER PACKAGING
Grudziądz, Pa
www.schumacher-packaging.com

SOFIDEL POLAND SP. Z.O.O.
Ciechanów, Ti
www.sofidel.com

STEICO
Czarna Woda, Ins
www.steico.com

STEICO
Czarnków, Ins
www.steico.com

STORA ENSO POLAND S.A.
Ostrołęka, Pa / Sa
www.storaenso.com

SWEDSPAN POLSKA
Bielsk Podlaski, MDF
www.swedspan.se

SWEDSPAN POLSKA
Orla, HB
www.swedspan.se

TOP S.A.
Tychy, Pa
www.topsa.pl

VELVET CARE SP. Z.O.O.
Klucze, Hy / Ti
http://velvetcare.pl

WARTER S.J.
Tarnówka, Pa / Re
www.fabryka-tektury.pl

WEPA PROFESSIONAL PIECHOWICE S.A.
Piechowice, Hy / Ti
www.wepro.com.pl.

ZAKLADY PRZEMYSLU FILCOWEGO FILTEX S.A.
Łódź, NW / Sp
www.filtex.com.pl

ZYWIECKIE ZAKLADY PAPIERNICZE "SOLALI" SPOLKA AKCYJNA
Żywiec, Sp / Ti
www.solali.com.pl.

ROMANIA

KASTAMONU ROMANIA S.A.
Reghin, PB
www.kastamonu.ro

KRONOSPAN
Brasov, MDF
www.kronospan-worldwide.com

KRONOSPAN ROMANIA
Sebes Jud. Alba, MDF
www.kronospan-worldwide.com

METALICPLAS SRL
Dej, Ti
www.metalicplas.ro

SC AMBRO S.A.
Suceava, Pa
www.rossmann.com

SC ECOPAPER S.A.
Zarnesti, Pa
www.ecopaper.ro

SC EGGER ROMÂNIA SRL
Radauti, PB / OSB
www.egger.com

SC PEHART TEC SA
Petresti, MP / Pa / Ti
www.peharttec.ro

SC PETROCART SA
Piatra-Neamt, Bo / Ti
www.petrocart.ro

SC VRANCART SA
Adjud, Pa / Ti
www.vrancart.ro

SOFIDEL ROMANIA
Calarasi, Ti
www.sofidel.com

SERBIA

DRENIK ND D.O.O.
Belgrade, Ti

FABRIKA HARTIJE A.D. BEOGRAD
Beograd, Pa / P&W
www.kappastar.com

FABRIKA KARTONA UMKA
Umka, Bo
www.umka.rs

KRONOSPAN SRB D.O.O.
Lapovo, PB
www.kronospan-worldwide.com

LEPENKA A.D.
Novi Kneževac, Bo
www.lepenka.co.rs

SPIK IVERICA
Ivanjica, PB
www.fantoni.it

SLOVAK REPUBLIC

BUČINA DDD, SPOL. S R.O. (LTD.)
Zvolen, PB
www.kronospan-worldwide.com

BUKOCEL A.S. PULPMILL
Hencovce, Pu (wood)
www.bukoza.sk

LEXPACK
MP
www.lexpack.sk

METSÄ TISSUE A.S.
Žilina, Ti
www.metsatissue.com

MONDI SCP A.S.
Ružomberok, Pa / P&W / Pu (wood)
www.mondigroup.com

SCA HYGIENE PRODUCTS SPOL. S R.O.
Gemerská Hórka, Hy / NW / Pa
www.sca.com

SHP HARMANEC A.S.
Harmanec, Ti
www.shpgroup.eu

SHP SLAVOSOVCE A.S.
Slavošovce, Ti
www.shpgroup.eu

SIMPO ŠIK D.O.O.
Kuršumlija, HB
http://simposik.rs

SPIK IVERICA
Ivanjica, PB
www.fantoni.it

SWEDSPAN INTERNATIONAL
Malacky, PB
www.swedspan.com

SLOVENIA

FANTONI LKI LESONIT
Lirska Bistrica, MDF
www.fantoni.it

GORICANE TOVARNA PAPIRJA MEDVODE D.D.
Medvode, Fi / P&W
www.goricane.si

KOLICEVO KARTON D.O.O.
Domžale, Bo
www.mm-karton.com

LEPENKA, PODJETJE ZA PROIZVODNJO IN PREDELAVO PAPIRJA TRZIC D.D.
Tržič, Bo / Pa / Ti
www.lepenka.si

PALOMA-SLADKOGORSKA
Sladki Vrh, Ti
www.paloma.si

PAPIRNICA VEVCE D.O.O.
Ljubljana, Pa / P&W
www.brigl-bergmeister.com

RADECE PAPIR D.D.
Radeče, Fi / Se
www.radecepapir.si

VIPAP VIDEM KRSKO D.D.
Krško, Ne / P&W
www.vipap.si

TURKEY

AKTUL KAGIT URETIM PAZARLAMA A.S.
Sakarya, Ti
www.aktulkagit.com.tr

DENTAŞ DUNAPACK
Çorlu, Pa
www.dentas.com.tr

EKA KAGIT
Kocaeli, Pa / Ti
www.ekakagit.com

ESSEL CELLULOSE AND PAPER
Zonguldak Çaycuma, Ti
www.essel.com.tr

HALKALI KAĞIT KARTON SAN. VE TIC. A.Ş.
Istanbul, Pa
www.halkalikagit.com.tr

HAYAT KIMYA
Yeniköy, Hy / Ti
www.hayat.com.tr

IPEK KAGIT SANAYI VE TICARET A.S.
Yalova, Hy / Ti
www.ipekkagit.com.tr

IPEK KAGIT SANAYI VE TICARET A.S.
Manisa, Hy / Ti
www.ipekkagit.com.tr

KARTONSAN, KARTON SANAYI VE TICARET A.S.
Izmit (Kocaeli), Bo
www.kartonsan.com

KASTAMONU ENTEGRE
Adana, PB
www.kastamonuentegre.com.tr

KASTAMONU ENTEGRE
Balıkesir, PB
www.kastamonuentegre.com.tr

KASTAMONU ENTEGRE
Gebze, MDF / PB
www.kastamonuentegre.com.tr

KASTAMONU ENTEGRE
Kastamonu, MDF / PB
www.kastamonuentegre.com.tr

KASTAMONU ENTEGRE
Samsun, PB
www.kastamonuentegre.com.tr

KASTAMONU ENTEGRE
Tarsus, PB
www.kastamonuentegre.com.tr

KMK PAPER
Kahramanmaras, Bo / CB / Pa
www.kmkpaper.com

KMK PAPER
Kütahya, Ne / Pa
www.kmkpaper.com

KOMBASSAN KAĞIT MATBAA GIDA VE TEKSTİL SAN.TİC.A.Ş.
Konya, Co / Fi / P&W
www.kombassan.com.tr

KOMKARTON CARDBOARD INDUSTRIES INC.
Muratli, Bo
www.kombassan.com.tr

LEVENT KAGIT SAN. VE TIC. A.S.
Izmir, Ti
www.leventkagit.co.tr

LILA KAGIT SAN. VE TIC. A.S.
Corlu, Ti
www.lilakagit.com

MARMARA KAGIT VE AMBALAJ SAN. TIC. A.S.
Vezirhan, pa
www.marmarakagit.com

MODERN KARTON A.S.
Corlu, Pa
www.modernkarton.com.tr

MONDI TIRE PAPER MILL
Tire, Pa
www.mondigroup.com

MOPAK GROUP
Dalaman, Bo / Sp / Co / Pa
www.mopak.com.tr

MOPAK GROUP
Kastamonu, Sp / Th
www.mopak.com.tr

MOPAK GROUP
Kemalpasa, Pa / P&W
www.mopak.com.tr

OYKA KAGIT AMBALAJ SA. VE TIC. A.S. CAYCUMA
Çaycuma, Pa / Sa
www.oyka.com.tr

PARTEKS KAGIT
Kayseri, Ti
www.partekspaper.com

PEHLIVANOĞLU KAĞIT
Çerkezköy, Pa
www.pehlivanoglukagit.com.tr

PM PACKAGING LTD
Istanbul, MP

SEKA MEHMET ALI KAĞITÇI
Kocaeli, (Paper Museum)
http://sekakagitmuzesi.com

SOFIDEL KAĞIT
Denizli, Ti
www.sofidel.com

TEPE BETOPAN A.Ş.
Ankara, PB
www.betopan.com.tr

TEZOL TUTUN VE KAGIT A.S.
Izmir, Ti
www.tezol.com.tr

TOPRAK KAGIT SANAYI A.S.
Bilecik, Ti
www.toprak.com.tr

TOPRAK KAGIT SANAYI A.S.
Istanbul, Co / Fi / P&W
www.toprak.com.tr

TURKOGLU KAGIT KARTON SANAYII VE TICARET A.S.
Istanbul, Bo
www.turkoglu.com.tr

VIKING KAGIT VE SELUELOZ A.S.
Izmir, Ti
www.viking.com.tr

UKRAINE

BANKNOTE PAPER MILL OF THE NATIONAL BANK OF UKRAINE
Malyn, Se

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Dnipropetrovsk, Fi / Pa / P&W
www.dbf.com.ua

DONETSK-VTORMA CO LTD
Donetsk, Pa / Ti
www.vtorma.com

FESKO
Lutsk, Ti
http://fesko.ruta.ua

IZMAIL PULP AND BOARD MILL JSC
Izmail, Pa
www.osnova.ua

KOHAVINKA PAPER MILL JSC
Hnizdychiv, Pa / Ti
http://kpf-paper.all.biz/en

KOROSTEN MDF
Korosten, MDF
www.kmm.ua

KORYUKIVKA PAPER
Koryukivka, Wa

KRONOSPAN UA LLC
Novovolynsk, PB
www.kronospan-worldwide.com

KYIV CARDBOARD AND PAPER MILL JSC
Obukhiv, Pa / Ti
www.papir.kiev.ua

LLC KRONO-UKRAINE
Broshniv-Osada, PB
www.kronoukraine.com

LLC KRONO-UKRAINE
Kamianka-Buska Town, PB
www.kronoukraine.com

LLC KRONO-UKRAINE
Solonytsivka, PB
www.kronoukraine.com

LUTSK PAPERBOARD AND ASPHALT BOARD MILL
Lutsk, Bo / Pa / Re / Sp
www.lkrk.com.ua

LVIVKARTONPLAST JSC
Lviv, Bo / Hy / Pa / Sp / Ti
http://paperandboard.com.ua

MALYN PAPER MILL JSC
Malyn, Sp
www.weidmann-electrical.com

RUBIZNE PAPERBOARD AND BOARD BOX MILL JSC
Rubizne, Pa
www.rktk.com.ua

THE CASTLE - PECHERSK LAVRA PAPER MILL
Kyiv, Hand
www.radozamok.com.ua

TPG ALBATROS LLC
Dnipropetrovsk, Hy / Ti
www.albatros.ua

TPM TSYURUPINSK PAPER-MILL LTD
Tsyurupinsk, Sp
www.tpm.com.ua

UNIPLYT
Ivano-Frankivsk, HB
http://uniplyt.com.ua

ZHYDACHIV PULP AND PAPER MILL JSC
Zhydachiv, Bo / MP / Ne / Pa / Sp
www.osnova.ua

ZHYTOMYR PAPER MILL JV
Zhytomyr, MP / Pa
http://en.cardboard.com.ua

PRODUCT KEY

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

WEBSITE DETAILS FOR TRADE ASSOCIATIONS

CZECH REPUBLIC	www.acpp.cz
ESTONIA	www.empl.ee
GREECE	http://htca.gr
HUNGARY	www.fedprint.hu
LITHUANIA	www.lietuvosmediena.lt
POLAND	http://sppd.pl/en
SLOVAK REPUBLIC	www.paper.sk
SLOVENIA	www.gzs.si
TURKEY	www.sksv.org
UKRAINE	www.ukrpapir.org
GENERAL	http://forestportal.efi.int

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