



**UNECE**

**Timber Committee Market Discussions**

**Geneva, 8 October 2003**

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# CEPI MEMBERS



## National Paper Associations from 15 countries in Europe:

Austria: AustroPapier

Belgium: COBELPA

Italy: ASSOCARTA

Finland: FFIF

Sweden: SFIF

Switzerland: ZPK

UK: The Paper Federation

Ireland: Jefferson Smurfit Group

Denmark: Danish Paper, Board & Pulpmakers Ass.

The Netherlands: VNP

Norway: PIL

Portugal: CELPA

Spain: ASPAPEL

France: COPACEL

Germany: VDP



# CEPI MEMBERS



## and 4 Associated Members:

Czech Republic: SPPaC

Hungary: Federation of the Hungarian Printers

Poland: SPP

Slovak Republic: ZCPP SR



## CEPI's Goals



- **To create a business-friendly environment for the companies by avoiding unnecessary and costly legislation**
- **To increase the influence of the paper industry by speaking “with one voice” to the EU institutions**
- **To implement a pro-active way of working, creating alliances whenever possible**
- **According to its statutes, CEPI doesn't address market issues**



# CEPI Organisation



## The 4 Committees include:

- **Forest Committee**
- **Environment Committee**
- **Recycling Committee**
- **Association Directors Committee (ADC)**
- **Other Areas of Activity:**
  - Research
  - Trade
  - Food Contact
  - Statistics
  - Starch
  - Social Affairs
  - Communications



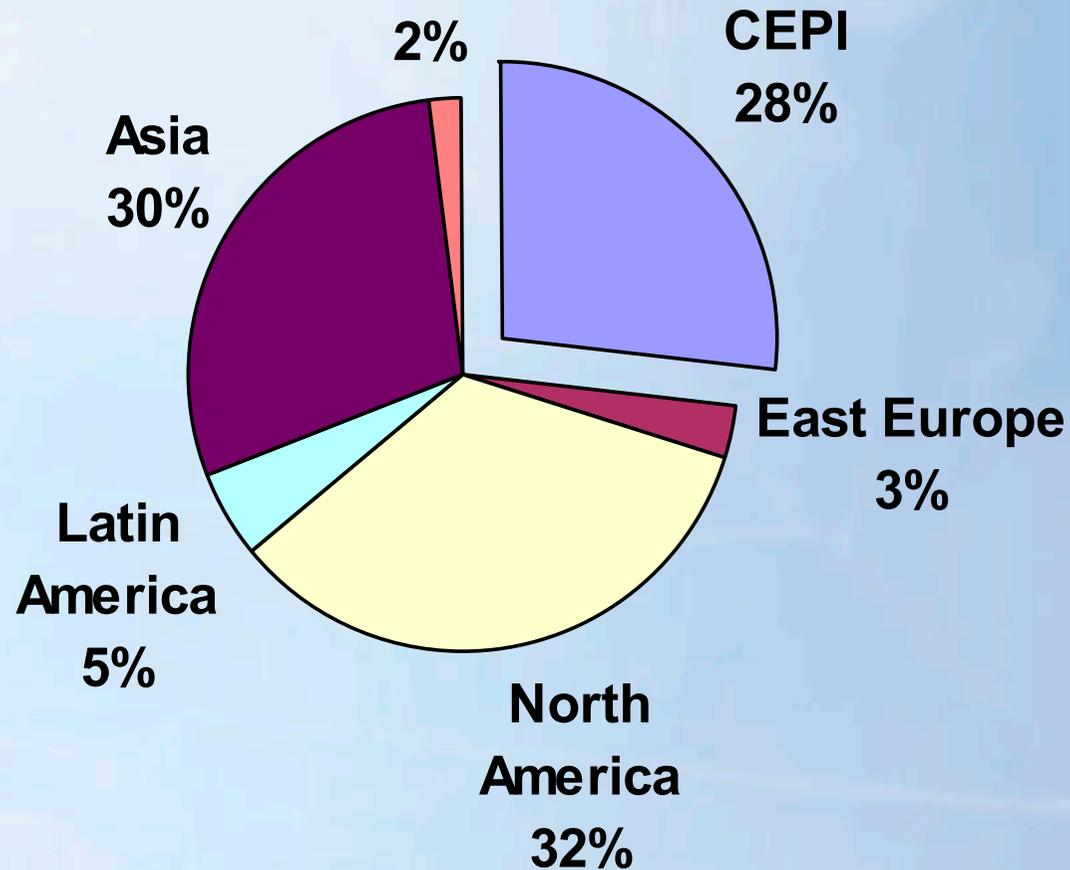
# CEPI Key Figures 2002



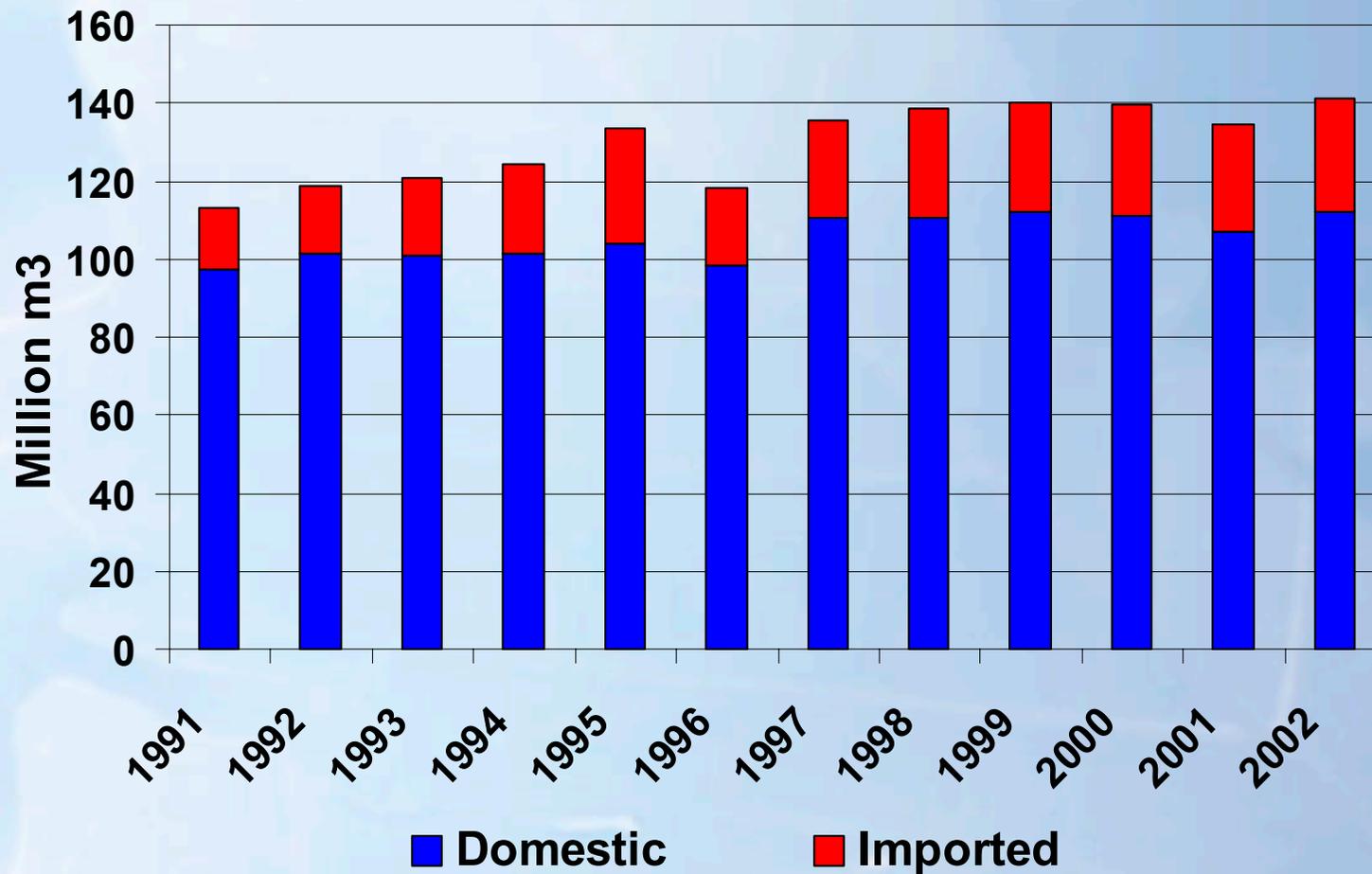
• <b>Companies</b>	<b>895</b>
• <b>Mills</b>	<b>1,257</b>
• <b>Employment:</b>	<b>251,100</b>
• <b>Turnover:</b>	<b>73 billion EUR</b>
• <b>Paper and Board production:</b>	<b>90 MT</b>
• <b>Pulp production:</b>	<b>39 MT</b>
• <b>Recovered Paper Utilisation</b>	<b>43 MT</b>



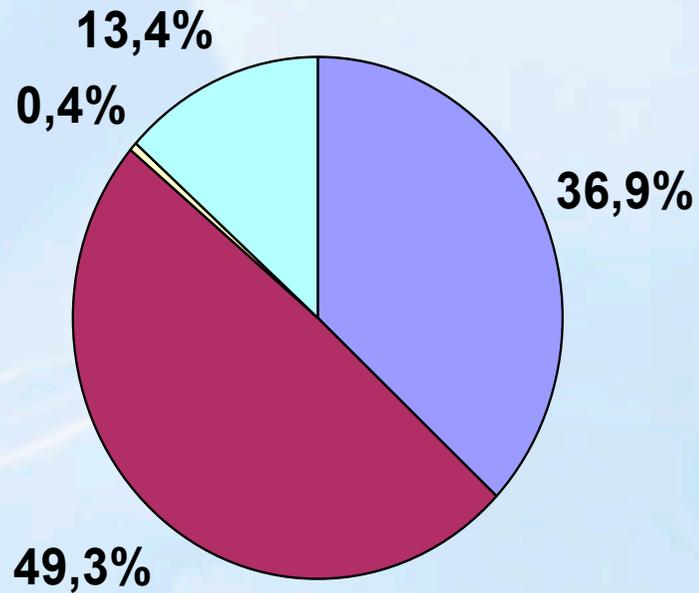
# The European Paper Industry: 28% of world paper production



# Evolution of wood consumption in CEPI area

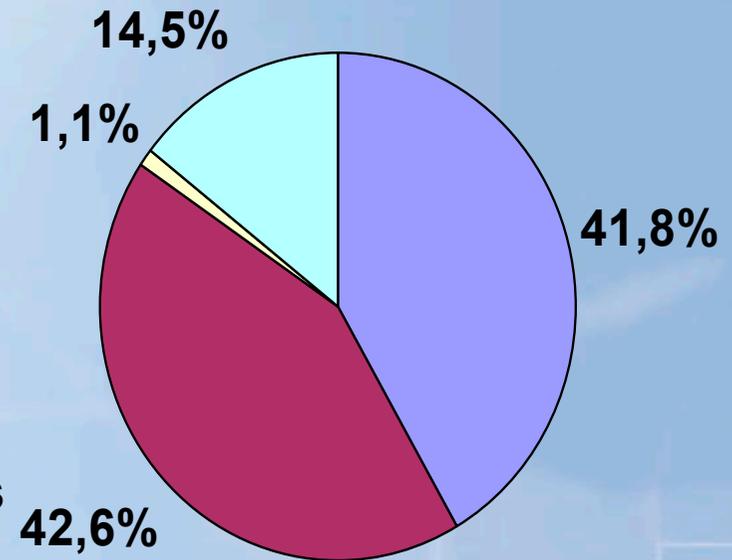


# Evolution of the raw material mix in CEPI area



1992

- Recovered paper
- Wood pulp
- Other pulp
- Non fibrous materials

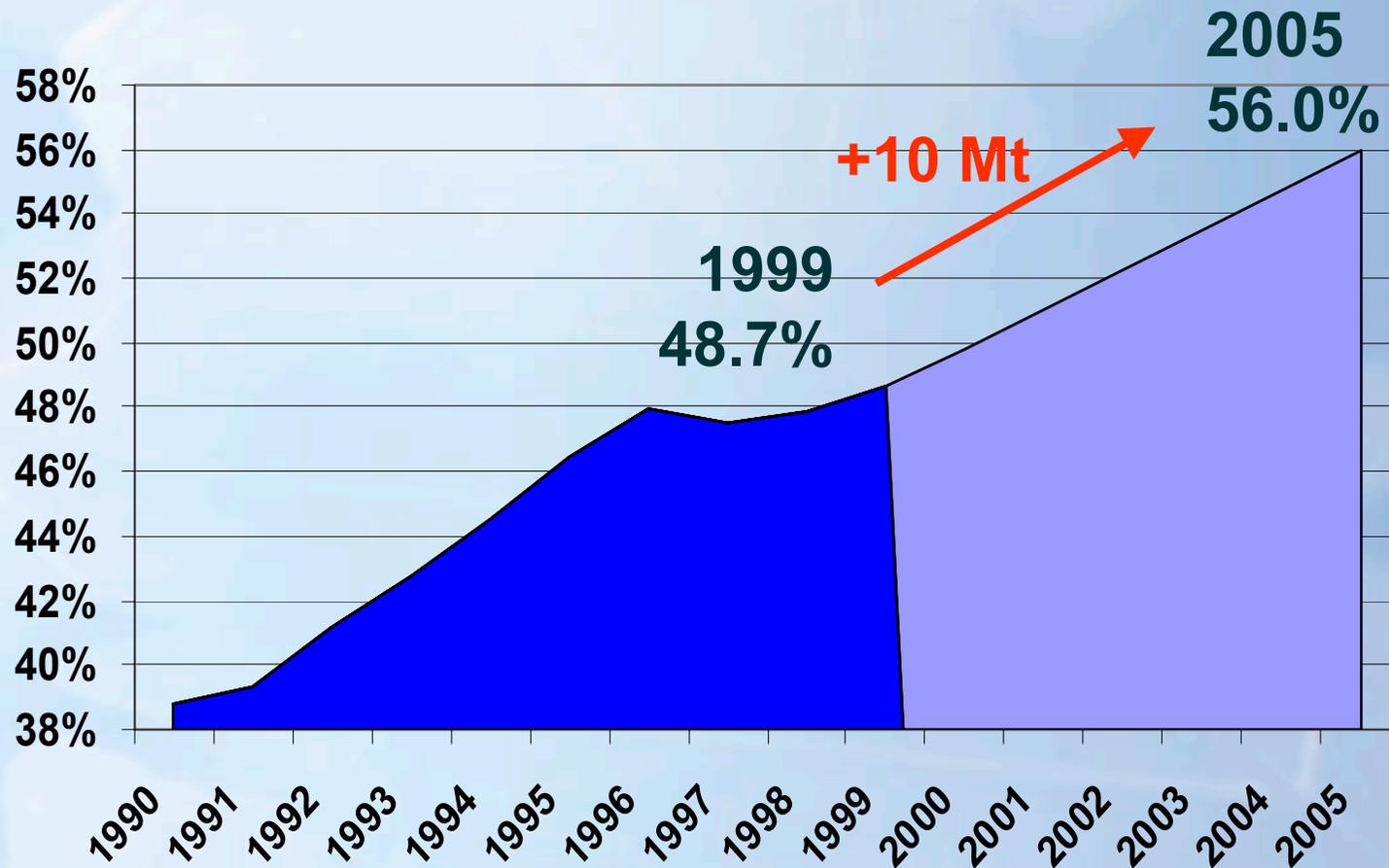


2002



# European Declaration on Paper Recovery

## Evolution of the recycling rate



# CEPI Pulp Key Figures



	2001	2002	% Change over 2001
	'000 Tonnes	'000 Tonnes	
<b>Production</b>	<b>37,928</b>	<b>38,827</b>	<b>+2.4</b>
<b>Total Deliveries</b>	<b>38,274</b>	<b>39,371</b>	<b>+2.9</b>
<b>Exports to Outside CEPI</b>	<b>1,282</b>	<b>1,617</b>	<b>+26.1</b>
<b>CEPI Internal Deliveries</b>	<b>36,992</b>	<b>37,754</b>	<b>+2.1</b>
<b>Imports from Outside CEPI</b>	<b>7,879</b>	<b>7,888</b>	<b>+0.1</b>
<b>Consumption</b>	<b>44,173</b>	<b>45,031</b>	<b>+1.9</b>



# CEPI Paper Key Figures



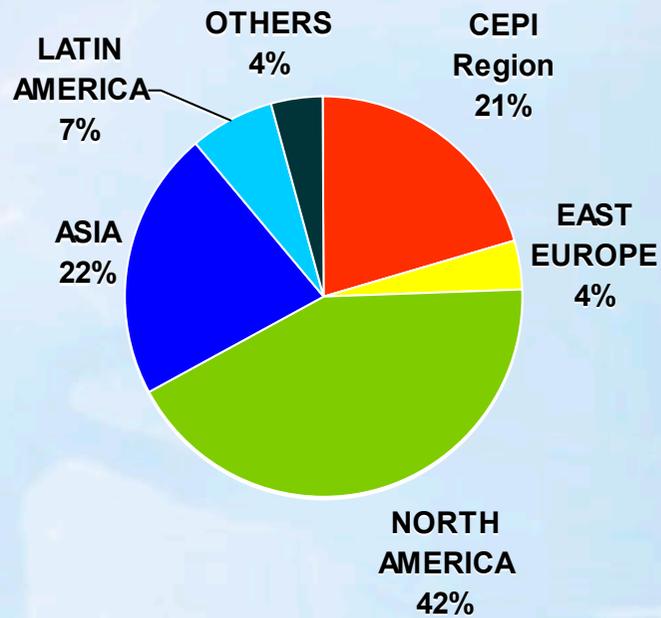
	2001	2002	% Change over 2001
	'000 Tonnes	'000 Tonnes	
<b>Production</b>	<b>88,248</b>	<b>90,593</b>	<b>+2.7</b>
<b>Total Deliveries</b>	<b>86,555</b>	<b>89,172</b>	<b>+3.0</b>
<b>Exports to Outside CEPI</b>	<b>10,546</b>	<b>12,461</b>	<b>+18.2</b>
<b>CEPI Internal Deliveries</b>	<b>76,009</b>	<b>76,711</b>	<b>+0.9</b>
<b>Imports from Outside CEPI</b>	<b>5,131</b>	<b>5,638</b>	<b>+9.9</b>
<b>Consumption</b>	<b>81,140</b>	<b>82,349</b>	<b>+1.5</b>



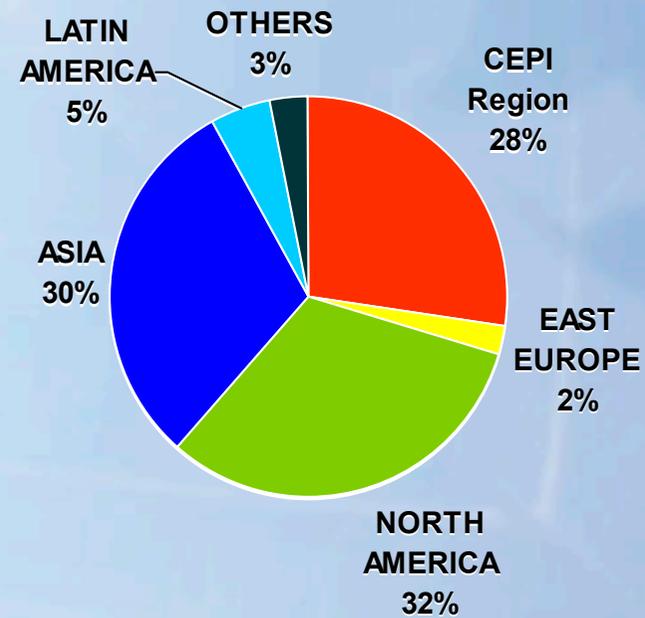
# CEPI and the Global Context: Pulp & Paper



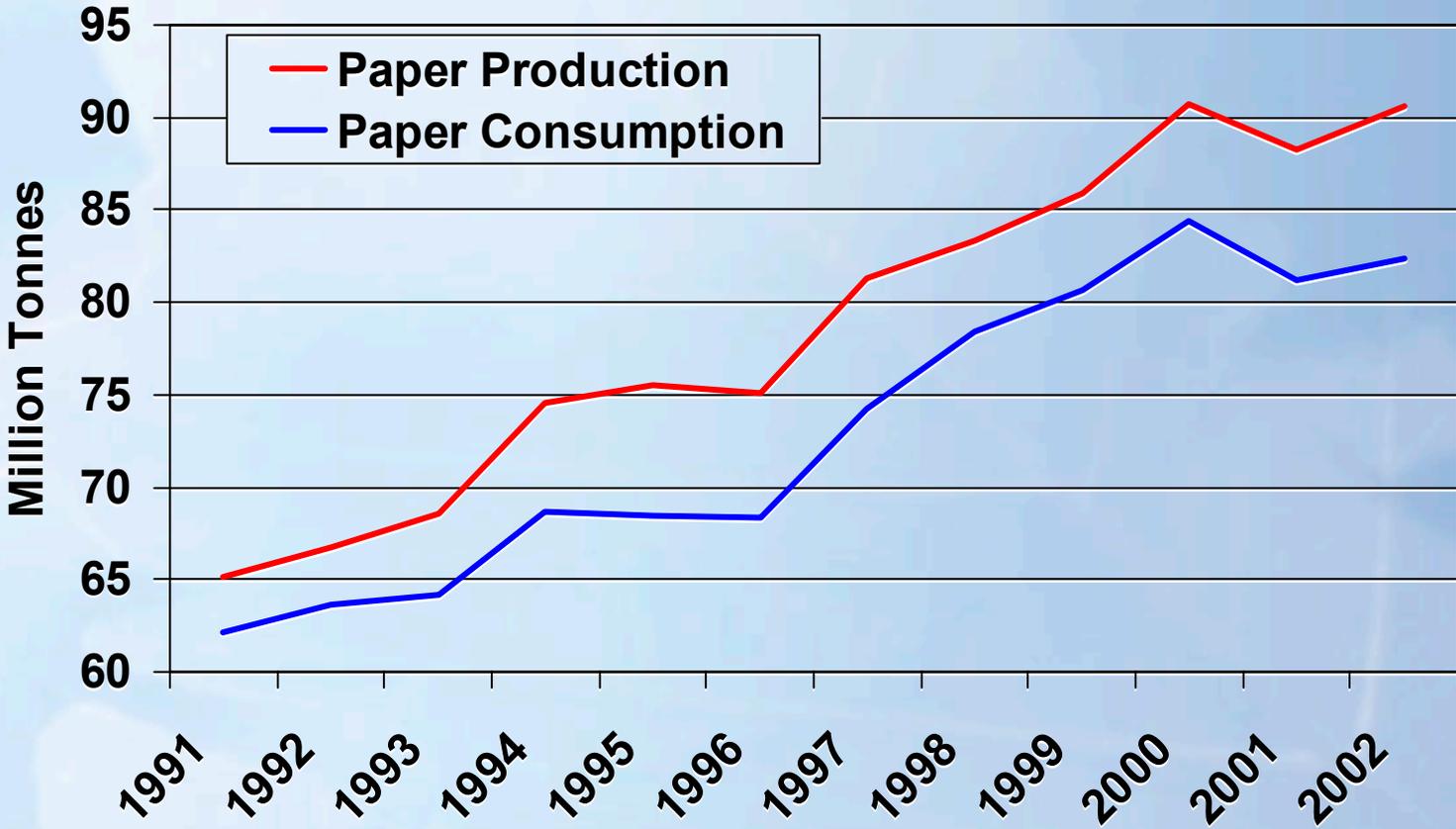
### Pulp Production by Region 2001



### Paper Production by Region 2001



# Paper Production and Consumption in CEPI countries 1991 - 2002



## 2002: a year of sustained recovery



- **A weak context:**
  - **EU GDP: + 1% only**
  - **Advertisement: lack of dynamism**
- **Pulp production: + 2.4% (2001: -3.4%)**
- **Paper & board production: + 2.7% (2001: -2.7%)**
- **Paper & Board exports jumped: + 18.2%**



# Paper Production and Consumption in CEPI countries 2002



'000 Tonnes	Production		Consumption	
	2002	% Change over 2001	2002	% Change over 2001
Newsprint	10,082	-5.8	10,305	-6.3
Uncoated Mechanical	6,199	+3.6	4,804	+4.1
Coated Mechanical	8,698	+3.0	6,696	+2.2
Uncoated Woodfree	10,094	+3.7	9,715	+3.0
Coated Woodfree	9,250	+4.5	8,354	+0.7
<b>TOTAL GRAPHIC</b>	<b>44,323</b>	<b>+1.4</b>	<b>39,874</b>	<b>0.0</b>
<b>Household &amp; Sanitary</b>	<b>5,662</b>	<b>+4.6</b>	<b>5,370</b>	<b>+6.4</b>
Case Materials	21,054	+3.8	20,766	+2.0
Carton Boards	7,883	+6.5	6,814	+5.1
Wrappings	3,579	+1.9	3,132	-1.5
Oth. Paper for Packaging	4,214	+4.3	3,042	-1.9
<b>TOTAL PACKAGING</b>	<b>36,730</b>	<b>+4.3</b>	<b>33,754</b>	<b>+1.9</b>
<b>Others</b>	<b>3,878</b>	<b>-0.3</b>	<b>3,351</b>	<b>+8.5</b>
<b>TOTAL PAPER &amp; BOARD</b>	<b>90,593</b>	<b>+2.7</b>	<b>82,349</b>	<b>+1.5</b>



# 6 months 2003 / 6 months 2002

## % change in production in CEPI area



**Pulp** 19,615 Kt +3.2%

**Total P&B** 46,309 Kt +2.3%

*Including:*

**Newsprint** 5,156 Kt +4.3%

**Unc. Mech.** 3,133 Kt +2.9%

**Unc. Woodf.** 5,087 Kt -2.3%

**Coated Mech.** 4,580 Kt +9.2%

**Coated Woodf.** 4,740 Kt +1.1%

**San. & Hous.** 2,846 Kt +2.7%

**Case Materials** 10,844 Kt +1.6%

**Wrappings** 1,800 Kt -0.2%

**Carton Boards** 6.079 Kt +1.6%

**+ other Pack.**

**Total**

**Graphic papers:**

22,696 +2.8%

**Packaging:**

18,723 +1.4%



# 6 months 2003 / 6 months 2002

## % change in production/shipments



	W. Europe (CEPI)	USA (AF&PA)	Canada (PPPC)	Japan (JPA)
Newsprint	+4.3%	-2.4%	+4.0%	-1.3%
Unc. Mech.	+2.9%	-19.5%	+7.9%	-2.2%
Unc. Woodf.	-2.3%	-1.3%	+0.8%	+0.5%
Coated Pap.	+4.9%	-2.1%	+9.7%	+1.9%
San. & Hous.	+2.7%	+1.5%	0.0%	+0.7%
Wrappings	-0.2%	-5.7%	-12.5%	-1.8%
Boards	+1.6%	0.0%	-3.0%	-0.1%
Total P&B	+2.3%	-1.1%	+2.8%	+0.1%

