Preliminary indications are that imports of paper & board into the region appear to have decreased by over 11% over 2011. Imports from other European countries accounted for 41% of all imports in the first three quarters of 2012 (41% 2011) and imports from North America had a share of 34% (33% in 2011), with the remaining 23% split virtually equally coming from the other regions (Latin America, Asia and the rest of the World).

Overall paper & board consumption estimated to fall by between 4% and 5%

It appears that the overall consumption of paper and board in CEPI countries in 2012 decreased by between 4% and 5% when compared to 2011, based on the latest data available. The unfavourable economic context - EU GDP is expected to have fallen by 0.3% in 2012 – combined with the impact of some long-term trends in the graphic paper chain explain this evolution. Due to the weak starting point, the gradual recovery beginning in 2013 will result in a low annual GDP growth rate of 0.4% for 2013 in the EU. In 2014 the EU GDP growth is forecast to rise to around 1.6%.

CEPI countries in 2012

Austria, Belgium, Czech Republic, Finland, France Germany, Hungary, Italy, Norway, Poland, Portugal, Romania, Slovak Republic, Slovenia, Spain, Sweden, The Netherlands, United Kingdom

Note: CEPI totals no longer include data for Switzerland.

Issue Dates for Other Statistics

Annual Statistics 2012
June 2013

Key Statistics 2012
June 2013

Historic Statistics 1991 - 2012
August 2013

Trade Statistics 2012
September 2013

Preliminary Statistics 2013
February 2014

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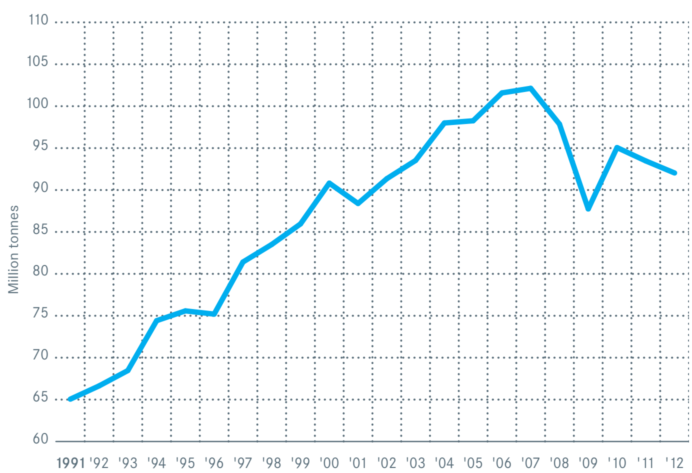
Overall output of pulp and paper by CEPI countries falls for the second consecutive year

Paper & board production in CEPI countries decreases by around 1.7%

Indications are that paper and board production by CEPI member countries fell by in the region of 1.7% in 2012. It is estimated that CEPI member countries produced around 92 million tonnes of paper and board in 2012, resulting from some adjustments in production capacities with closures amounting to 2 million tonnes and new capacities or upgrading of existing ones accounting for close to 1 million tonne. This contrasts with the peak total paper & board production of 102 million tonnes in 2007. European pulp & paper production suffered from the economic slowdown but its performance remains above other energy-intensive sectors. According to first estimates, world paper & board production has increased by 1% in 2012. EU27, USA and Japan have registered a 1.5% contraction compared to 2011, while China, India and Russia have registered significant increases.

Production of paper & board in CEPI countries, 1991 - 2012



Source: CEPI (2012 estimated)

Overall output in packaging and tissue grades in 2012 improves over 2011 in contrast to a decline in graphics

In sectoral terms, packaging and tissue grades showed growth in production when compared to the previous year whereas output of graphic grades continued to decline for the 8th consecutive year. Overall production of graphic grades has been severely impacted by the deterioration of the printing activity and is likely to have fallen by between 5% and 5.5%. Output of newsprint is expected to show a fall of over 7% with the lowest annual output for twenty years.

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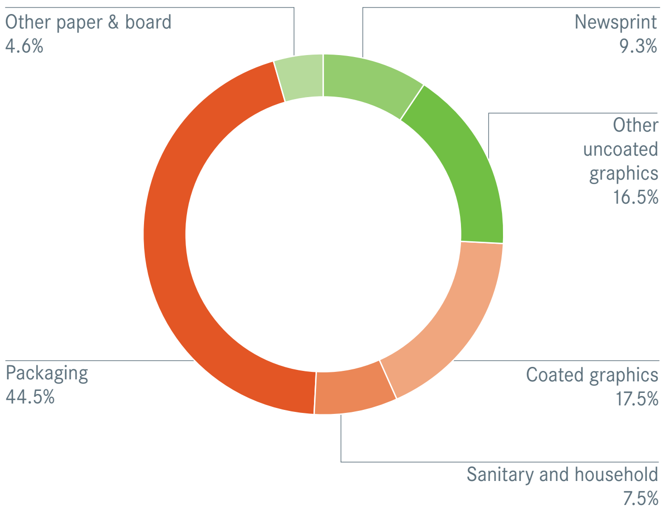
Production of both uncoated woodfree grades and uncoated mechanical grades is estimated to have decreased by about 4% compared with 2011. Output of coated woodfree grades decreased by around 2% and that of coated mechanical grades fell by around 7%. The overall result is that production of uncoated graphic grades is expected to show a decrease of around 4% and coated grades saw a fall in production of about 4%. Mechanical graphic grades, excluding newsprint, registered a decrease in output of over 5% and it is estimated that production of woodfree grades fell by over 3%

Production of paper & board by grade in CEPI countries in 2012



Source: CEPI estimates

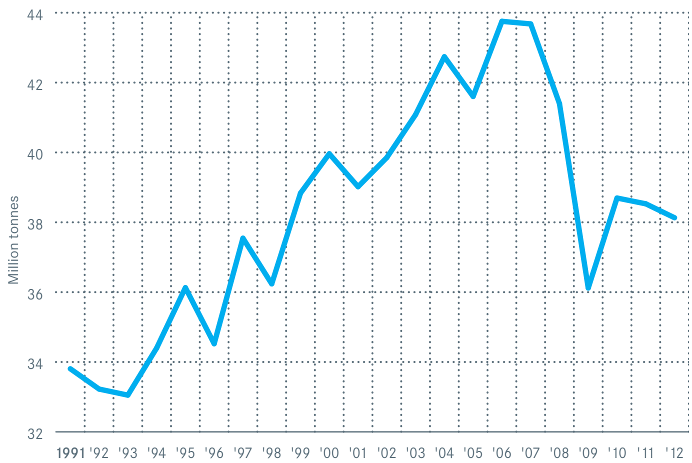
The production of packaging grades is estimated to have increased by around 1% when compared with 2011. Within the packaging grades, case materials recorded an increase in production of between 1% and 1.5%. The output of carton board has been relatively stable with a modest 0.3% growth while the production of wrapping grades increased by over 3%. Because only tonnage variations are being measured it should be noted that these volumes are affected by the continuing trend towards light-weighting. The share of packaging grades has been superior to the share of the graphic grades in 2012 for the first time, accounting respectively for 44.5% and 43.4% of the total paper & board production.

Hygienic paper manufacturers are estimated to have seen a rise in output of between 1% and 1.5% when compared with 2011, pursuing its continuous growth after the pause experienced in 2008 and 2009. Production of all other grades of paper and board – mainly for industrial and special purposes – decreased by between 0.5% and 1%.

Total pulp production shows a decline but market pulp output increases

It is estimated that the production of pulp (integrated + market) has decreased by up to 1% when compared to the previous year, with total output of approximately 38 million tonnes. Output of mechanical pulp is believed to have decreased by around 4.5% whilst production of chemical pulp increased by 0.5% when compared to 2011. It is estimated that output of market pulp increased by about between 4% and 4.5%, while integrated pulp output decreased by 3% in 2012 when compared to 2011, as a result of the closures of the paper units in integrated mill sites.

Production of pulp in CEPI countries 1991 - 2012



Source: CEPI (2012 estimated)

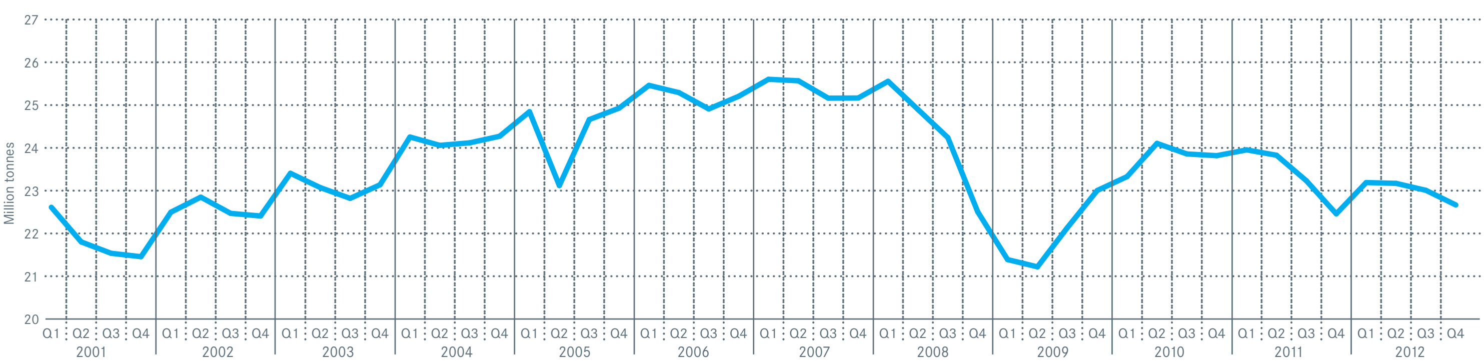
Usage of paper for recycling also decreases

It is estimated that consumption of paper for recycling by CEPI members fell by between 1% and 1.5%.

Paper & board deliveries by CEPI countries decrease by between 1.5% and 2% but benefit from foreign markets relative dynamism

Based on the cumulative data up to the end of the third quarter of 2012 it is expected that total paper & board deliveries for the year will have fallen by over 2% when compared to 2011. By the end of September 2012, deliveries of graphic grades had decreased by over 3% and deliveries of packaging grades had fallen by just over 1%. Exports had risen by over 4% by the end of September with the main markets for exports being other European countries, which took about 35% of all exports (37% in 2011), with deliveries to Asian countries taking around 28% (28% in 2011) and 10% being exported to North America (10% also in 2011).

Production of paper & board in CEPI countries, quarterly trend 2001 - 2012



Source: CEPI (Q4 2012 estimated)