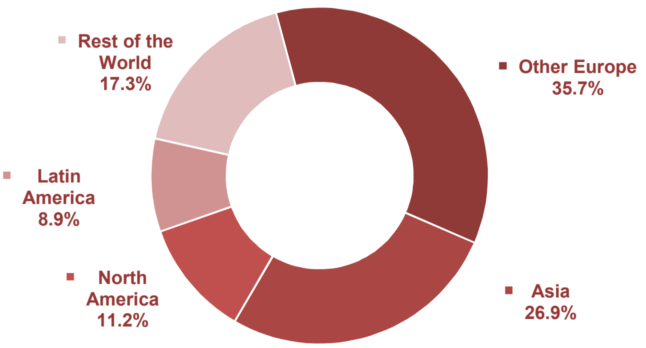
Exports of paper and board by region in 2015



Source: CEPI estimates

Preliminary indications are that imports of paper and board into the region appear to have increased by between 1.5% and 2% in 2014. Imports from other European countries accounted for 44% of all imports in the first three quarters of 2015 (42% in 2014) and imports from North America had a share of 30% (30% in 2014), with the remaining 26% split between the other regions - Asia 11%, Latin America 8%, and the rest of the world 7%.

Overall paper and board consumption estimated to remain unchanged

It would appear that the overall consumption of paper and board in CEPI countries in 2015 was relatively stable compared to 2014, based on the latest available data. The December 2015 macroeconomic projections for the euro area are broadly unchanged and foresee annual real GDP increasing by 1.6% in 2015, 1.8% in 2016 (1.9% and 2.0% respectively for the EU). The slowdown and rebalancing of the Chinese economy, lower commodity prices, and strains in some large emerging market economies will continue to weigh on growth prospects in 2016–17.

CEPI countries in 2015

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

Issue dates for other statistics

Annual Statistics 2015
June 2016

Key Statistics 2015
July 2016

Historic Statistics 1991-2015
August 2016

Trade Statistics 2015
September 2016

Preliminary Statistics 2016
February 2017

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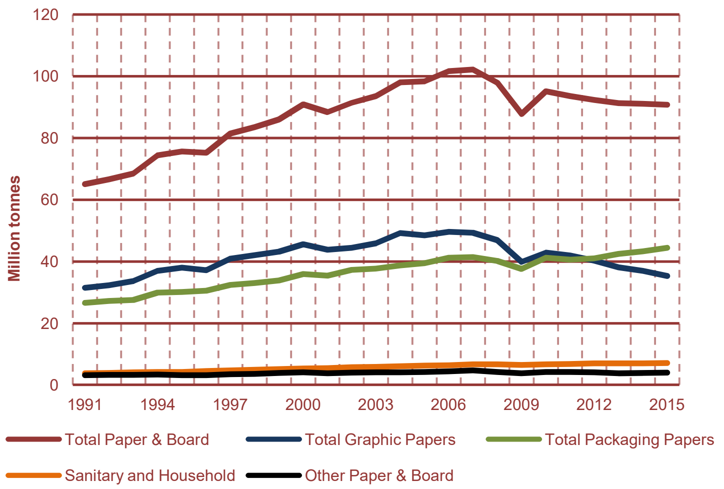
Relative stability of paper and board production in 2015

Paper and board production in CEPI countries has been relatively stable in 2015, recording a limited decrease of 0.3%

Paper and board production by CEPI member countries fell slightly, by around 0.3% in 2015 according to preliminary figures, after -0.2% in 2014. Total production in 2015 was around 91 million tonnes. Mill and machine closures in Europe in 2015 amounted to 2.4 million tonnes whilst new capacities or upgrading of existing ones reached 1.3 million tonnes only. According to very first estimates, world paper & board production was stable in 2015, after +1.0% in 2014.

United States and Canadian production are expected to be down by 0.8% and 8.0% respectively. In addition, production has fallen in South Korea (-1.6%) and Japan (-1.5%), whilst Brazilian output was largely unchanged. The highest growth rates in paper and board output appear to have been recorded by India (+2.8%) and Russia (+2.5%). According to first estimates, Chinese production progression has slowed down dramatically to register a 1.5% increase rate.

Production of paper and board in CEPI countries 1991 - 2015

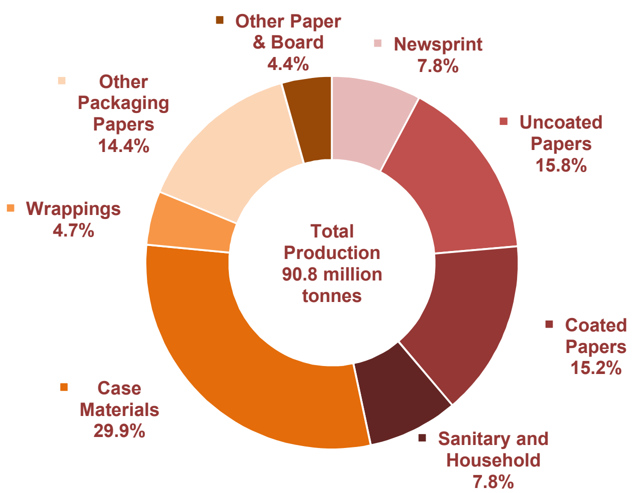


Source: CEPI estimates

The output of graphic grades continues to decline in contrast to the performance of packaging grades

The picture by sector shows a continuation of the decline in the production of graphic grades witnessed over recent years together with a continued growth in the output of packaging grades. Weak printing and publishing activities continue to have an impact on the overall production of graphic grades, which fell by around 4.4%. Output of newsprint is expected to fall by around 7.4%. Production of uncoated woodfree grades is estimated to have decreased by 1.5% compared to 2014 and output of uncoated mechanical grades fell by 2.7%. Output of coated woodfree grades decreased by around 6.7% and output of coated mechanical grades fell by around 3.6%. The overall result is that production of uncoated graphic grades is expected to decrease by around 1.9% and coated grades by about 5.2%. Mechanical graphic grades, excluding newsprint, registered an estimated decrease in output of 3.2% and production of woodfree grades a fall of 3.9% compared with 2014.

Production of paper and board by grade in CEPI countries in 2015

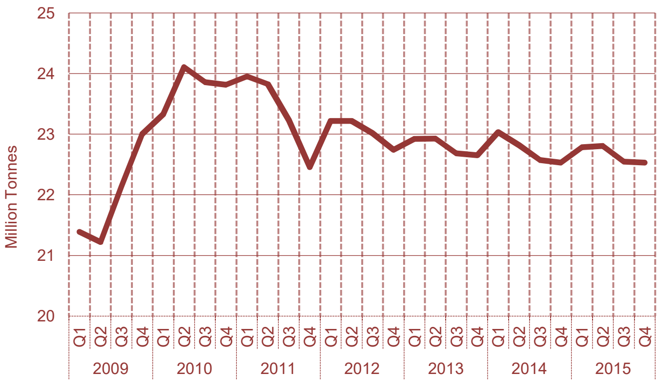


Source: CEPI estimates

The production of packaging grades is estimated to have increased by around 2.6% compared to 2014. Within the packaging grades, case materials recorded an increase in production of around 3.0%. The output of carton board grew by 1.4% and the production of wrapping grades showed a small increase of around 0.1%. Production is impacted by the ongoing trend towards light-weighting and resource efficiency as it is measured in tonnes. The share of packaging grades accounted for 48.9% (47.6% in 2014) of the total paper and board production, with graphic grades taking 38.8% (40.5% in 2014).

Sanitary and household manufacturers are estimated to have seen an increase in output of around 1.8% compared to 2014 and accounted for 7.8% of total production. The output of all other grades of paper and board - mainly for industrial and special purposes - increased by around 2.0% (4.4% of total production).

Production of paper and board in CEPI countries, quarterly trends 2009 - 2015

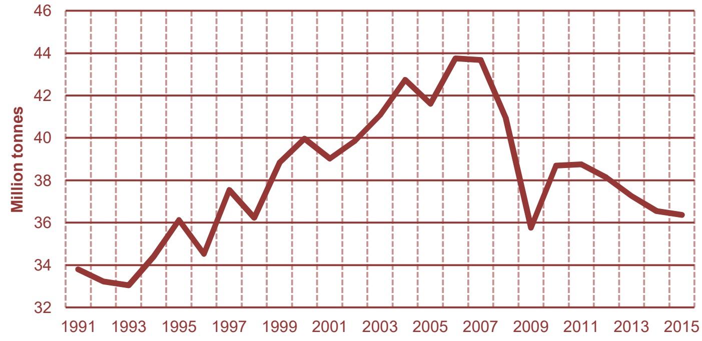


Source: CEPI estimates

Total pulp production falls by 0.5% and market pulp output decreases by around 2.6%

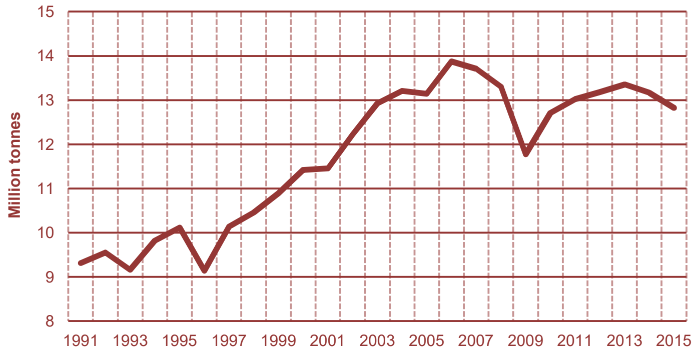
It is estimated that the production of pulp (integrated + market) has decreased by around 0.5% compared to the previous year, with total output of approximately 36 million tonnes. Output of mechanical pulp has increased by around 0.4% whilst production of chemical pulp decreased by around 0.9% compared to 2014. It is estimated that the output of market pulp decreased by around 2.6%.

Production of pulp in CEPI countries 1991 - 2015



Source: CEPI estimates

Production of market pulp in CEPI countries 1991 - 2015

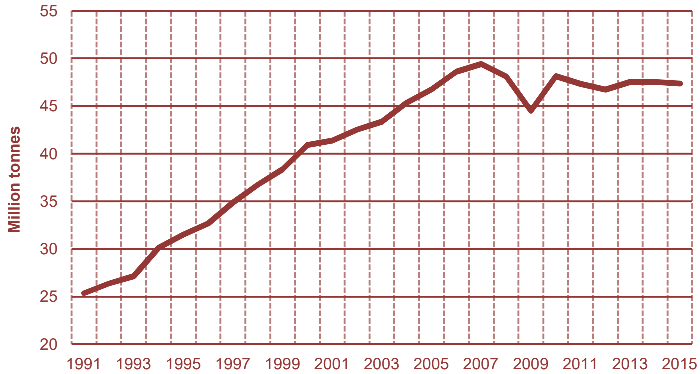


Source: CEPI estimates

Utilisation of paper for recycling falls by around 0.4% compared to 2014

It is estimated that utilisation of paper for recycling by CEPI members decreased by around 0.4% compared to 2014 at 44 million tonnes. As in recent years, the fall of the graphic paper sector demand was partly offset by the more positive development in the packaging paper and board sector.

Utilisation of paper for recycling in CEPI countries 1991 - 2015



Source: CEPI estimates

Paper and board deliveries by CEPI countries are expected to be relatively stable compared to 2014

Based on cumulative data up to the end of the third quarter of 2015, it is expected that total paper and board deliveries for the year remained relatively unchanged compared to 2014, following the trend in paper and board consumption. By the end of September 2015, deliveries of graphic grades had decreased by 3.1% whilst deliveries of packaging grades rose by 2.5%.

Exports had fallen by 1.2% by the end of September with the main markets for exports being other European countries, which accounted for about 36% of all exports (36% in the same period of 2014), with deliveries to Asian countries accounting for around 27% (as in 2014), 11% being exported to North America (10% in 2014), 9% to Latin America and 17% to all other countries.