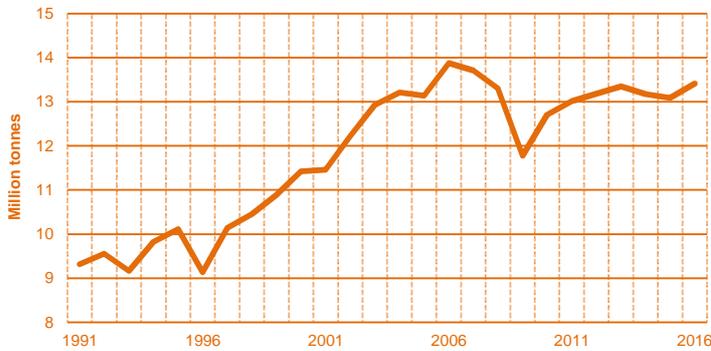


### Production of market pulp in CEPI countries



### Utilisation of paper for recycling falls by around 0.3% compared to 2015

It is estimated that utilisation of paper for recycling by CEPI members, at 47.6 million tonnes, decreased by around 0.3% compared to 2015.

### Utilisation of paper for recycling in CEPI countries



### CEPI countries in 2016

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

Source for all graphs: CEPI estimates

### Issue dates for other statistics

Annual Statistics 2016 - June 2017

Key Statistics 2016 - July 2017

Historical Statistics 1991-2016 - September 2017

Trade Statistics 2016 - September 2017

Preliminary Statistics 2017 - February 2018

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### For more detailed statistics

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# Preliminary Statistics 2016

Confederation of European Paper Industries



## Paper and board production in slight decrease in 2016.

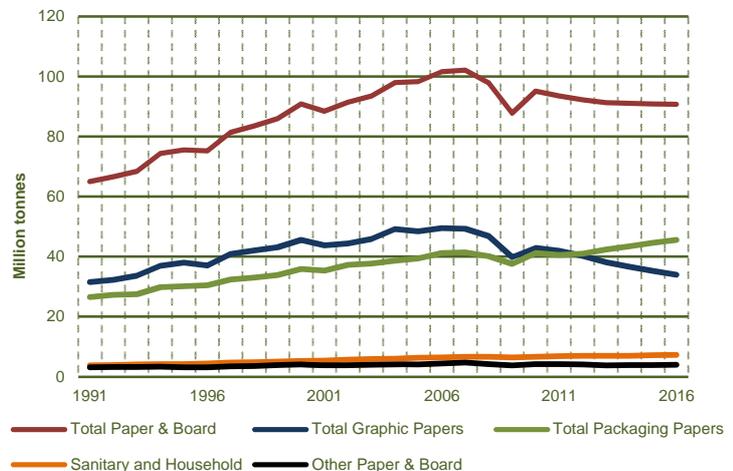
### Paper and board production in CEPI countries shows a small decline from 2015

CEPI member countries paper and board production has decreased by 0.1% in 2016 compared to the previous year, according to preliminary figures. Total production in 2016 was around 91 million tonnes. Machine closures in Europe in 2016 were compensated by new capacities or upgrading of existing ones.

United States and Canadian production are expected to be down by 1.0% and 1.8% respectively. Output slightly increased in South Korea (+0.5%), whilst it was unchanged in Japan and Brazil compared to 2015. The highest growth rates in paper and board output appear to have been recorded by Russia (+3.8%), India (+2.9%) and China (+2.9%).

According to very first estimates, world paper and board production will be up by 0.8% in 2016 to reach 410 million tonnes.

### Production of paper and board in CEPI countries

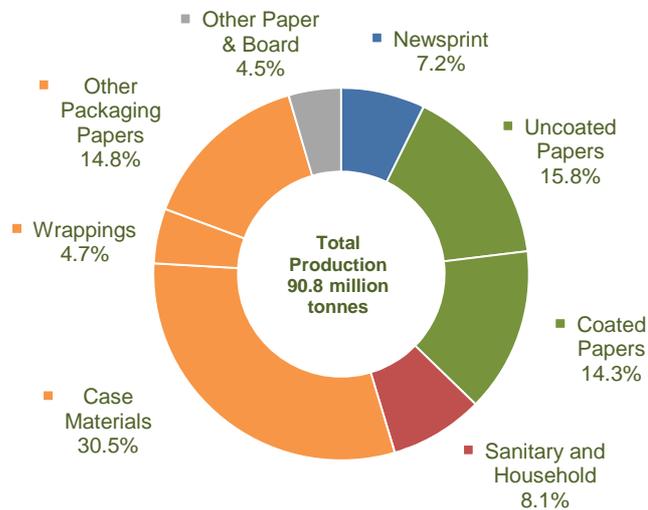


## The decline in output of graphic grades persists whilst production of packaging grades continues to rise

The picture by sector maintains the situation witnessed in recent years with a continuation of the decline in the production of graphic grades and further 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 3.7%. Output of newsprint - used mainly for daily newspapers - is expected to fall around 6.4%. The production of graphic papers for other communication needs - magazines and catalogs, direct mail, directories, etc. - have recorded different developments. The decline in the output of coated mechanical paper and coated woodfree grades reach 7.1% and 5.0% respectively, while uncoated mechanical paper output increased by 1.9%. The production of uncoated woodfree grades - mainly office paper - is estimated to have decreased by 1.4%.

## Production of paper and board by grade in CEPI countries in 2016

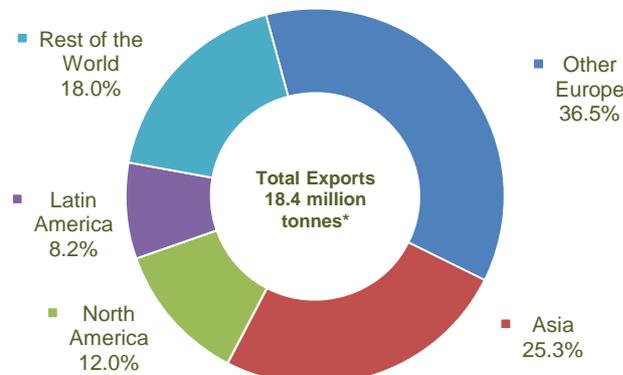


The production of packaging grades is estimated to have increased by around 2.3% compared to 2015. Within the packaging grades, case materials - mainly used for transport packaging and corrugated boxes - recorded an increase in production of 2.2%. The output of carton board plus other packaging board - such as small goods packaging or book covers - grew by 2.8%, and the production of wrapping grades - used for paper bags production - showed an increase of around 1.2%. 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 50.1% (49.0% in 2015) of the total paper and board production, with graphic grades accounting for 37.3% (38.8% in 2015).

Sanitary and household manufacturers are estimated to have seen an increase in output of about 1.8% compared to 2015 and accounted for 8.1% of total production. Output of all other grades of paper and board - mainly for industrial and special purposes - increased by 2.8% (4.5% of total production).

Exports had fallen by 2.9% by the end of September 2016 with the main markets for exports being other European countries, which accounted for about 37% of all exports (36% in the same period of 2015), with deliveries to Asian countries accounting for about 25% (26% in 2015), 12% being exported to North America (11% in 2015), 8% to Latin America and 18% to all other countries.

## Exports of paper and board by region in 2016



\*Estimation based on 9 months

Preliminary indications are that imports of paper and board into the region have increased by around 6% compared to 2015. Imports from other European countries accounted for 44% of all imports in the first three quarters of 2015 (46% in the same period 2015) and imports from North America had a share of 30% (29% in 2015), with the remaining 26% split between the other regions - Asia 11%, Latin America 6%, and the Rest of the World 9%.

## Overall paper and board consumption estimated to increase by 1%

It would appear that the overall consumption of paper and board in CEPI countries in 2016 increased by 1% compared to 2015, based on the latest data available.

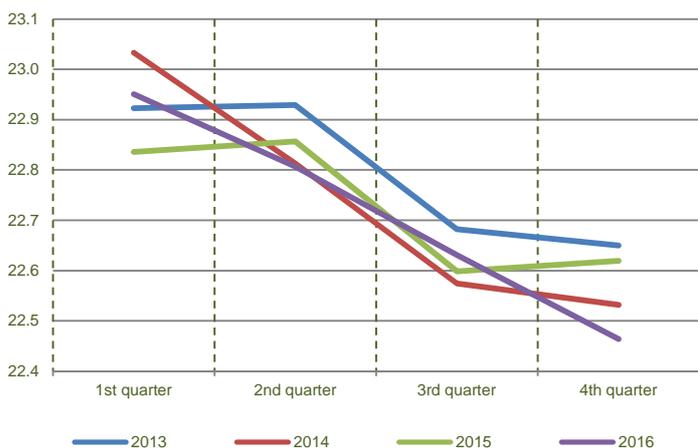
The latest macroeconomic projections for the euro area foresee annual real GDP increasing by 1.7% in 2016 and 1.5% in 2017; 1.8% and 1.6% respectively for the EU. Growth in emerging market and developing economies is expected to pick up in 2017.

Weak investment and productivity growth are, however, weighing on medium-term prospects across most of these countries. Downside risks to global growth include increasing policy uncertainty in major advanced economies and some emerging countries, financial market disruptions and weakening potential growth.

## Total pulp production increases by 0.7% and market pulp output rises by around 2.5%

It is estimated that the production of pulp (integrated + market) has increased by 0.7% compared to the previous year, with total output of approximately 36.5 million tonnes. Output of mechanical pulp has increased by around 1.4% and production of chemical pulp has increased by about 0.5% compared to 2015. It is estimated that the output of market pulp increased by around 2.5%.

## Quarterly production of paper and board in CEPI countries



## Paper and board deliveries by CEPI countries are expected to be down by 0.7%

Based on the cumulative data up to the end of the third quarter of 2016 it is expected that total paper and board deliveries for the year were down by 0.7% compared to 2015, whilst internal deliveries were stable. By the end of September 2016, deliveries of graphic grades had decreased by 5.6% whilst deliveries of packaging grades rose by 2.9%.