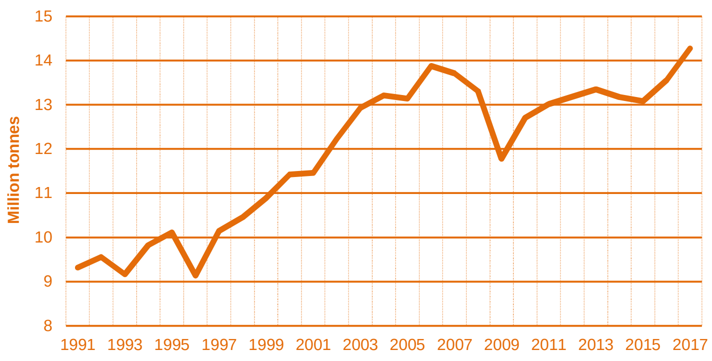
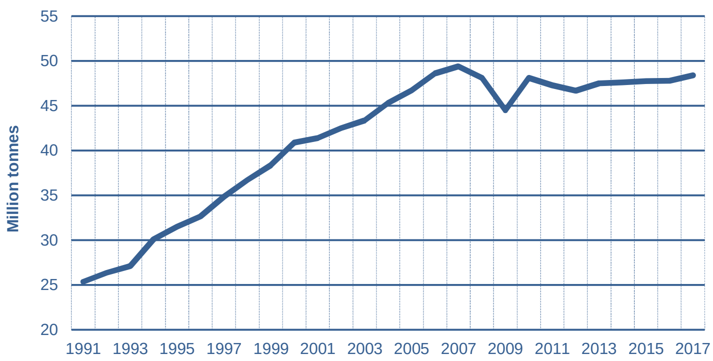
Production of market pulp in CEPI countries



Utilisation of paper for recycling increases by around 1.3% when compared to 2016

It is estimated that utilisation of paper for recycling by CEPI members, at 48.4 million tonnes, increased by around 1.3% compared to 2016.

Utilisation of paper for recycling in CEPI countries



CEPI countries in 2017

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

Source for all graphs: CEPI estimates

Statistics Subscriptions

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Issue Dates for Other CEPI Statistics Publications

Annual Statistics 2017 - June 2018

Key Statistics 2017 - July 2018

Historical Statistics 1991-2017 - September 2018

Trade Statistics 2017 - September 2018

Preliminary Statistics 2018 - February 2019

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Preliminary Statistics 2017

Confederation of European Paper Industries
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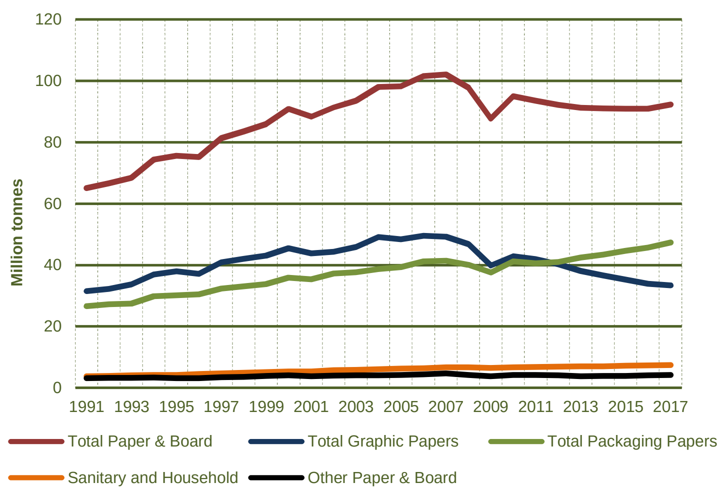
Paper and board production increases by 1.5%, the highest annual rise since 2010

CEPI member countries' paper and board production has increased by 1.5% in 2017 compared to the previous year, according to preliminary figures. Total production in 2017 was around 92.3 million tonnes. New capacities and upgrade of existing ones have more than compensated for closures in 2017, similar to 2016.

World paper and board production has also increased by 1.5% in 2017, almost reaching 420 million tonnes according to very first estimates. Japan has registered a moderate growth while the US was stable. Production in Canada, South Korea and India contracted. China has grown at a higher speed than the previous year: +4.7% in 2017 against +2.9% in 2016. Brazil and Russia also recorded strong growth.

Production of paper and board in CEPI countries



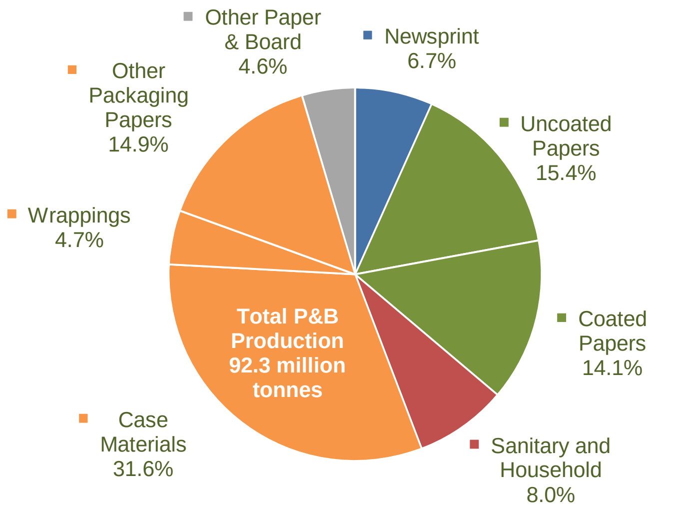
Recent trends in the output of graphic and packaging grades continue

Divergence in the production trends of graphic grades against packaging grades continues with a decline in the production of graphic grades and additional growth in the output of packaging grades.

The overall production of graphic grades fell by around 1.5%. Output of newsprint - used mainly for daily newspapers - is expected to fall around 5.4%. The production of graphic papers in other areas – magazines and catalogues, direct mail, directories, etc. – shows slightly different trends. Output of coated mechanical paper fell by 1.0% whilst production of coated woodfree grades increased by 2.0%. Uncoated mechanical paper output decreased by 2.1% and the production of uncoated woodfree grades - mainly office paper - is estimated to have decreased by 1.3%.

Overall this means that production of coated graphic papers rose by 0.5% whilst output of uncoated grades fell by 1.6%. Production of woodfree graphics showed a slight increase of 0.1% whilst output of mechanical graphic papers decreased by 1.5%.

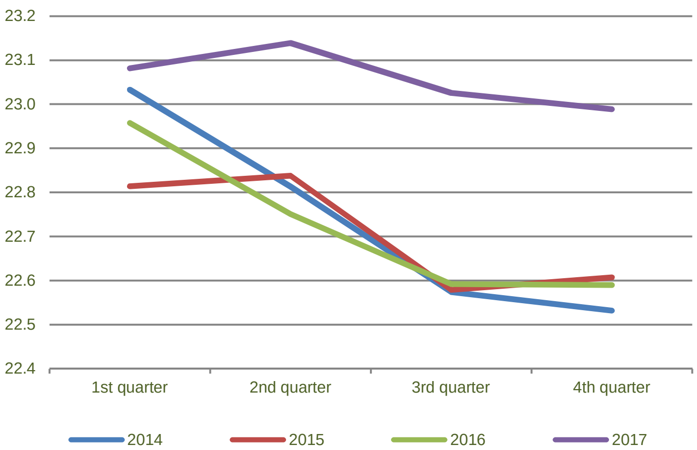
Production of paper and board by grade in CEPI countries in 2017



The production of packaging grades is estimated to have increased by around 3.7% compared to 2016. Within the packaging grades, case materials - mainly used for transport packaging and corrugated boxes - recorded a strong 5% increase in production. The output of carton board plus other packaging board - such as small goods packaging or book covers - grew by 1.8%, and the production of wrapping grades - used for paper bags production - showed an increase of around 0.5%. Production is affected by the ongoing trend towards light-weighting and resource efficiency as it is measured in tonnes. The share of packaging grades accounted for 51.2% (50.2% in 2016) of the total paper and board production, with graphic grades accounting for 36.2% (37.3% in 2016).

Sanitary and household manufacturers' output is estimated to have increased by about 1.1% compared to 2016 and accounted for 8.0% of total production (8.0% in 2016). Output of all other grades of paper and board - mainly for industrial and special purposes - increased by 2.5% (4.6% of total production, 4.5% in 2016).

Quarterly production of paper and board in CEPI countries

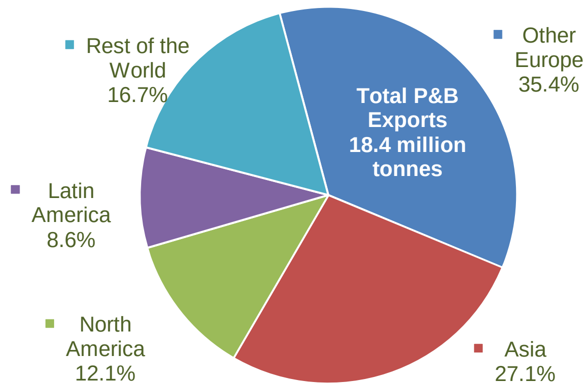


Paper and board deliveries by CEPI countries are expected to have risen by 1.8%

Based on the cumulative data up to the end of the third quarter of 2017, it is expected that total paper and board deliveries for the year were up by 1.8% compared to 2016 and internal deliveries were up by around 1%. By the end of September 2017, deliveries of graphic grades had decreased by 1.7% whilst deliveries of packaging grades rose by 4.1%.

Exports had risen by 5.4% by the end of September 2017 with the main markets for exports being other European countries, which accounted for about 35% of all exports (37% in the same period of 2016), with deliveries to Asian countries accounting for about 27% (25% in 2016), 12% being exported to North America (12% in 2015), 9% to Latin America and 17% to all other countries.

Exports of paper and board by region in 2017



Preliminary indications show that imports of paper and board into the region have decreased by around 3.6% compared to 2016. Imports from other European countries accounted for 44% of all imports in the first three quarters of 2017 (44% in the same period 2016) and imports from North America had a share of 31% (30% in 2016), 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 around 0.5%

The overall consumption of paper and board in CEPI countries in 2017 increased by around 0.5% compared to 2016, based on the latest data available. This is the fourth year in a row registering growth, thanks to the favourable economic environment in the EU and a stronger global growth and trade.

EU GDP is expected to grow by 2.1% in 2018 after 2.3% in 2017.

Total pulp production increases by 2.2% and market pulp output rises by around 5.3%

It is estimated that the production of pulp (integrated + market) has increased by 2.2% compared to the previous year, with total output of approximately 38.1 million tonnes. Output of mechanical pulp has increased by around 0.8% and production of chemical pulp has increased by about 2.7% compared to 2016. It is estimated that the output of market pulp increased by around 5.3%, as a consequence of substantial investments in new capacities.