Keypoints of the German paper industry
September 2013

UTIPULP General Assembly,
September 20th 2013, Barcelona

German paper industry

Key data	2011	2012
Companies	102	102
Production	22.7 m tons	22.6 m tons
Turnover	€ 15.5 bn	€ 14.7 bn
Employees	41,300	40,400

Paper for Recycling utilisation	16.2 m tons
Recovered paper utilisation rate	72%
Chemical pulp consumption	4.6 m tons
Mechanical pulp consumption	1.2 m tons
Wood consumption	10.4 solid m^3

German paper industry – production by grades 2012

German paper industry – raw materials 2012

Total Paper and Board
Production und Deliveries

in 1.000 tons, Turnover in Million €	Jan - Jul 2013	Jan - Jul 2012	in % 13/12
Production	**13.106**	**13.207**	**-0,8**
Total Deliveries	**13.150**	**13.134**	**0,1**
Domestic Deliveries	7.149	7.147	0,0
Total Exports	6.002	5.987	0,2
Exports to western europe	3.605	3.750	-3,9
Exports to eastern europe	1.571	1.434	9,5
Exports to other regions	826	804	2,8
Turnover Pulp and Paper Industry	**8.349**	**8.580**	**-2,7**

Graphic Paper
Production und Deliveries

in 1.000 tons	Jan - Jul 2013	Jan - Jul 2012	in % 13/12
Production	**5.029**	**5.313**	**-5,3**
Total Deliveries	**4.982**	**5.195**	**-4,1**
Domestic Deliveries	2.564	2.697	-4,9
Total Exports	2.418	2.498	-3,2
Exports to western europe	1.552	1.614	-3,8
Exports to eastern europe	422	450	-6,1
Exports to other regions	444	435	2,1

Graphic Paper
Production by Grade

in tons	Jan - Jul 2013	Jan - Jul 2012	in % 13/12
Total Graphic Papers	**5.029.302**	**5.312.948**	**-5,3**
Newsprint and Magazine	**3.005.543**	**3.146.229**	**-4,5**
Newsprint Standard	1.009.370	978.975	3,1
LWC Papers	977.064	1.064.420	-8,2
Other Magazine and Catalogue Papers (SC; HWC;...)	1.019.109	1.102.834	-7,6
Other Graphic Papers	**2.023.759**	**2.166.719**	**-6,6**
Woodfree Papers	**1.771.634**	**1.920.421**	**-7,7**
Mechanical Papers	**252.125**	**246.298**	**2,4**

Paper and Board for Packaging
Production und Deliveries

in 1.000 tons	Jan - Jul 2013	Jan - Jul 2012	in % 13/12
Production	**6.355**	**6.244**	**1,8**
Total Deliveries	**6.437**	**6.288**	**2,4**
Domestic Deliveries	3.199	3.116	2,7
Total Exports	3.238	3.172	2,1
Exports to western europe	1.911	1.988	-3,8
Exports to eastern europe	1.019	882	15,5
Exports to other regions	308	302	1,9

Sanitary and Household
Production und Deliveries

in 1.000 tons	Jan - Jul 2013	Jan - Jul 2012	in % 13/12
Production	**861**	**816**	**5,5**
Total Deliveries	**881**	**835**	**5,5**
Domestic Deliveries	862	814	5,9

Other Paper and Board
Production und Deliveries

in 1.000 tons	Jan - Jul 2013	Jan - Jul 2012	in % 13/12
Production	**861**	**834**	**3,2**
Total Deliveries	**850**	**816**	**4,1**
Domestic Deliveries	524	521	0,6
Total Exports	326	295	10,4
Exports to western europe	131	135	-3,0
Exports to eastern europe	123	94	31,0
Exports to other regions	72	66	8,5

Other Paper and Board
Production by Grade

in tons	Jan - Jul 2013	Jan - Jul 2012	in % 13/12
Wall Paper Base	104.131	89.815	15,9
Base Paper for e.g. Decor films	288.846	303.188	-4,7
Others	467.677	441.200	6,0

Producers‘ Price Index
Total Paper and Board Basis 2005 = 100

Consumption of chemical pulp in the German paper industry

in 1.000 tons	1 - 7 / 2013	1 - 7 / 2012	change in %
BHK - Bleached Hardwood Kraft	1.312	1.345	-2,5
BSK - Bleached Softwood Kraft	905	877	3,2
Others*	498	532	-6,4
Gesamt	**2.715**	**2.754**	**-1,4**

*Inkl. Sulfits-hardwood and other chemical pulp

Quelle: VDP

Raw Materials (in 1.000 tons)

	1 - 7 / 2013	1 - 7 / 2012	change in %
Production			
Chemical Pulp	939	924	1,7
Mechanical Pulp	574	590	-2,8
Consumption			
Chemical Pulp	2.698	2.754	-2,0
Mechanical Pulp	677	691	-2,1
Paper for Recycling	9.473	9.453	0,2

Quelle: VDP

Capacities – Germany 2013

Status	Company	Mill	Grade	Production
Closure PM				
Graphic paper				
Mai	UPM	Ettringen	SC	175.000
Insolvency				
Graphic paper				
Juli	Reflex Premium Papier	Düren	CWF, UWF	27.500
Rebuilds				
Packaging				
März	Julius Schulte Trebsen	Trebsen	Recycled Testliner/fluting	50.000
Juni	Kübler & Niethammer	Kriebstein	Packaging paper	30.000
Shut				
Graphic paper				
Juli	Arctic Paper	Mochenwangen	Uncoated woodfree/mechanical	15.000
Other Paper				
März	Fährbrücke	Langenweissbach	Baking and cooking paper	17.000
Juni	Lunzenau	Lunzenau	Special board	15.000
Startup				
Sanitary & Household				
Mai	SCA	Kostheim	Sanitary and Household	50.000

VDP Top issues 2013

Economy
Industry data
Product Groups
Economic issues

Raw materials
Fibre availability
Bioenergy
Sustainability

Environment/energy
Energy policy
Emission trading
Environmental issues

Public relations
Press
Industry PR
Communications

Raw materials - current issues

Campaign of NGOs in Germany against the use of virgin fiber in the pulp and paper industry:

- Brochures with the statements of NGOs were published by the German Federal Environmental Agency and Department of the Environment regarding forrest and wood.
- This brochures contents unobjective arguments and denunciation against use of wood and pulp in the paper industry.
- In response VDP plans a round table with all stakeholder to discuss the real facts.

Raw materials - current issues

Status quo respective the implementation of the EU Timber Regulation in Germany:

- Implementation in Germany: „Gesetz gegen den Handel mit illegal eingeschlagenem Holz“ (HolzSiG) since may 2013.
- The responsible authority in Germany, the Federal Office for Agriculture and Food (Bundesanstalt für Landwirtschaft und Ernährung, BLE), starts with the first examination in june.

Raw materials - current issues

Online Claim Portal of FSC

- FSC plans to develop an internet portal – named Online Claim Portal – to which it binds FSC-certified companies.
- Currently the German companies of the paper industry and other industrial sector along the value-added chain wood and pulp are refuse this project of FSC. Because the platform contains many open technical, legal, and safety questions.
- In September VDP adressed open questions to the FSC Germany.