

CEPI Introduction

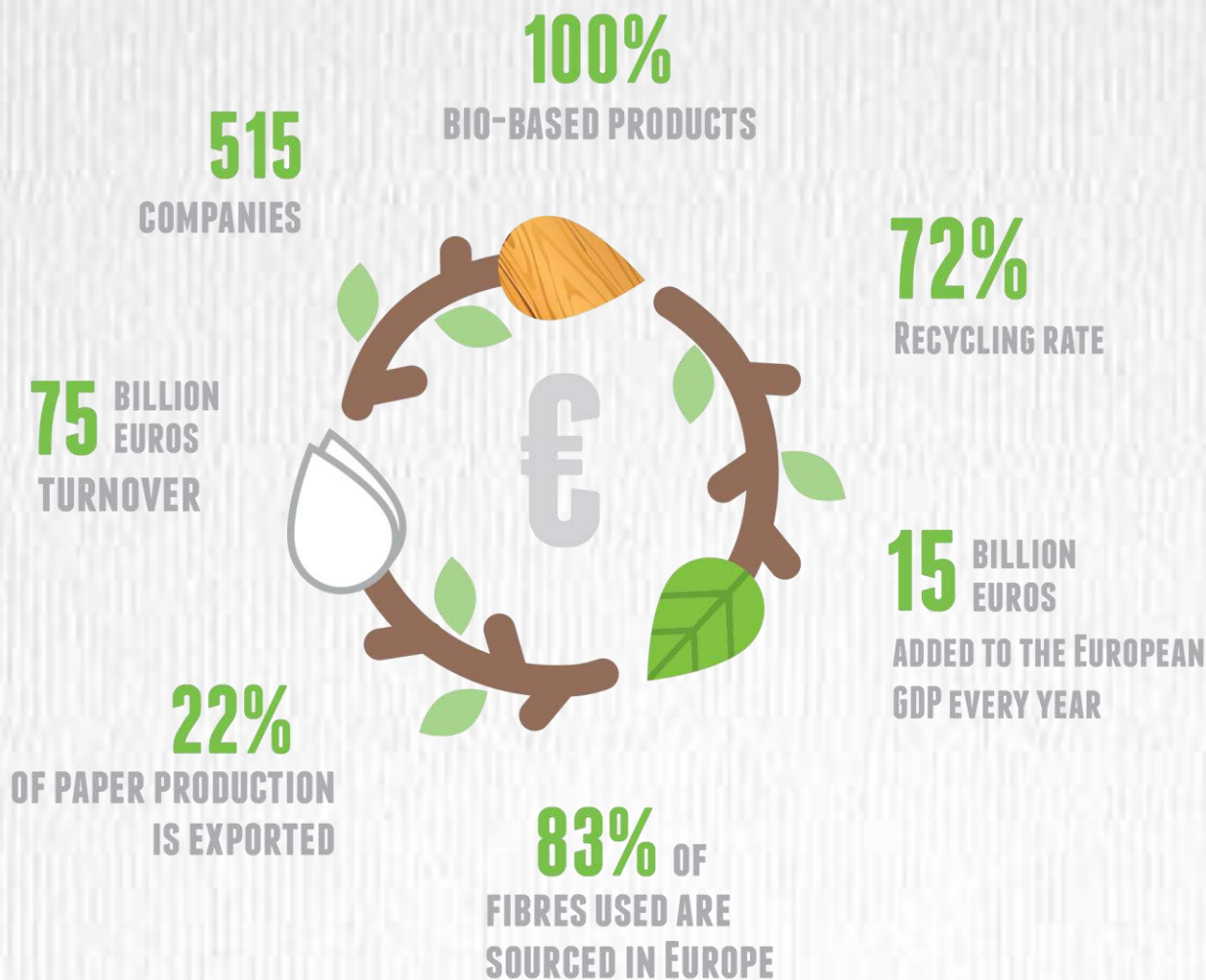


Marco Mensink
Director General - CEPI
Confederation of European Paper
Industries

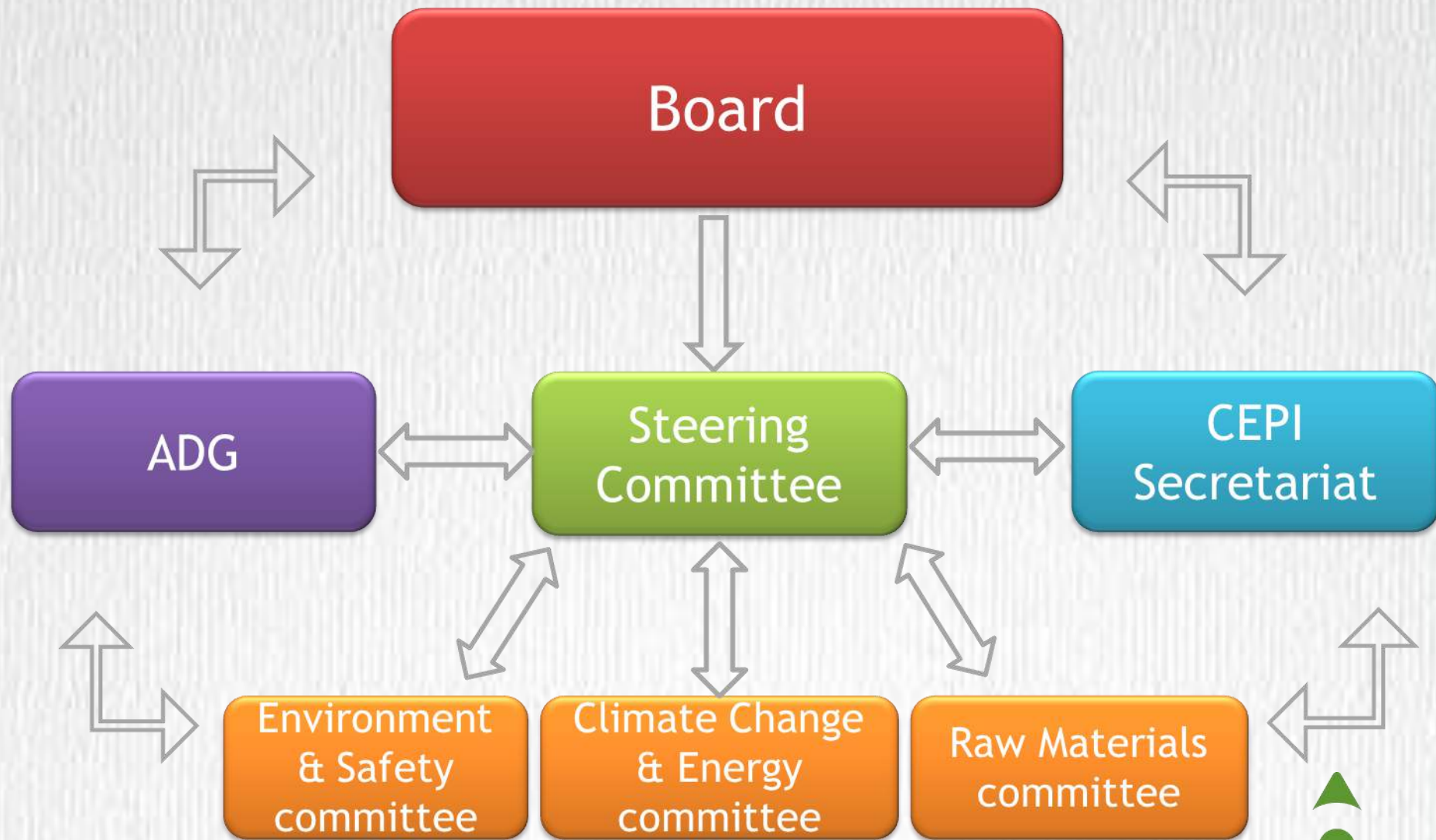


CEPI in Brief

EUROPE'S PAPER INDUSTRY - A KEY PARTNER FOR EUROPE



A new CEPI 2020 structure



Current and new Chairman

- Gary McGann, Smurfit Kappa Group



- Peter Oswald, Mondi

Steering Committee membership

2016 - 2017



3 CEOs :

- Peter Oswald / Mondi
- Diogo da Silveira / Portucel Soporcel
- Karl-Henrik Sundström / StoraEnso



3 ADGs :

- Paul-Antoine Lacour / COPACEL (ADG Chair)
- Klaus Windhagen / VDP
- Carlos Reinoso / ASPAPEL

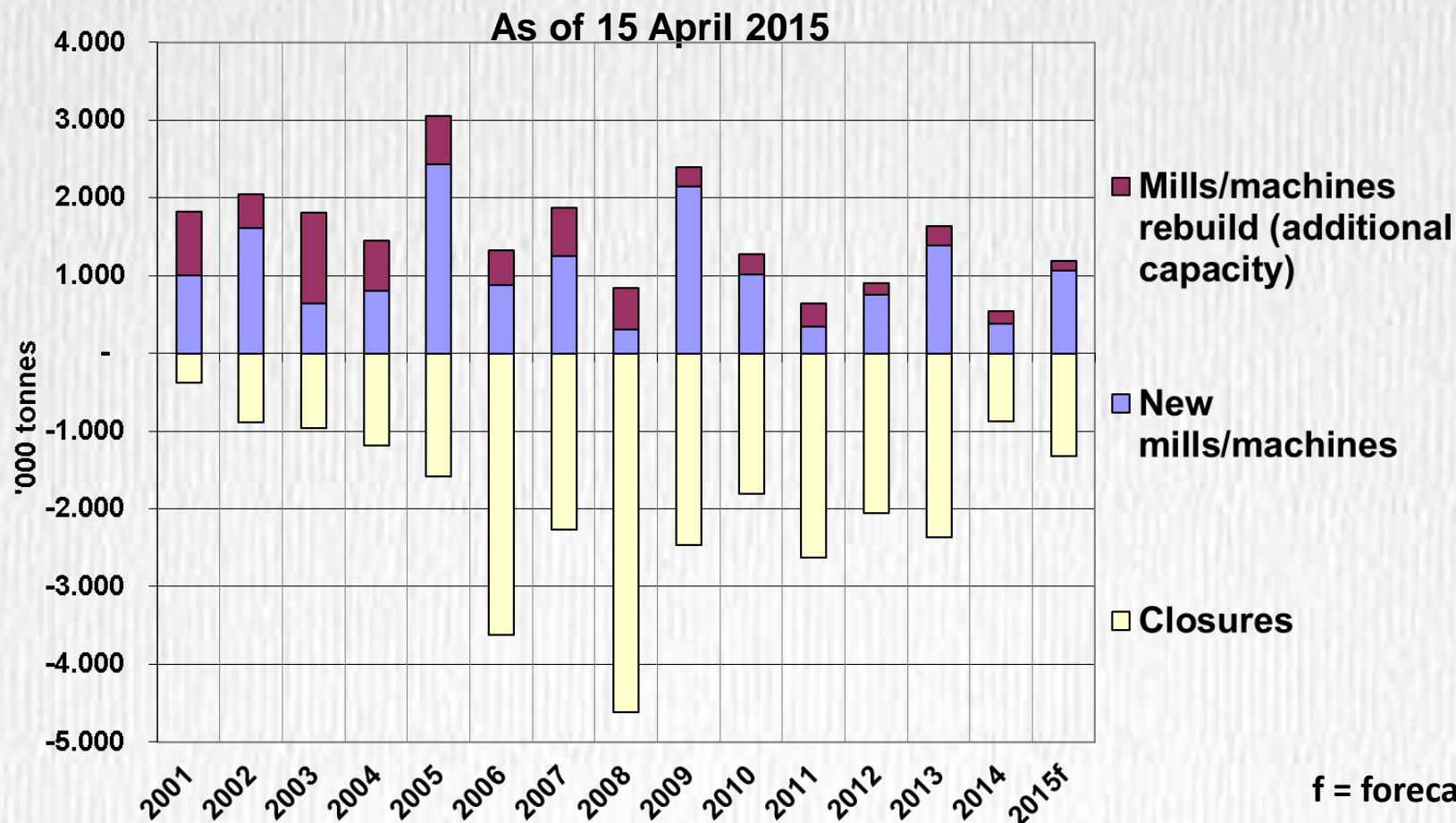
2014 in numbers

- Production 91,1 million tonnes
- -0,2% down from 2013
- But 10,8% lower than in the peak in 2007

- Packaging up 1,9% to 43,3 million tonnes
- Sanitary papers up 0,4% to 7 million tonnes
- Specialties up 3% to 3,9 million tonnes
- Graphic papers down by 3,1% to 36,9 Mtonnes

Investments past and future

Source: RISI, April 2015



But now 5 billion-euro investments planned in Europe until 2017

CEPI Introduction

Key issues

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Competitiveness



Overarching EU policy themes

- Juncker Commission policy agenda
- Juncker Investment Plan for Europe
- Digital economy (Industry 4.0), Circular Economy, Internal market



Impact assessments

- Cumulative Cost Impact Assessment CCIA
- New Impact Assessment Board and procedures



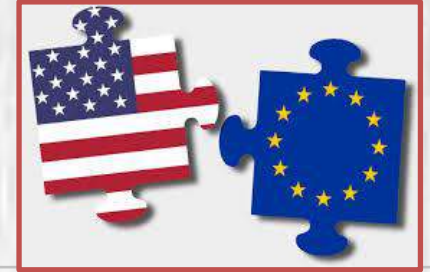
Structures

- New Commission Structure. VP Katainen.
- High Level Group on Energy Intensive Industries
- New Mandate Competitiveness Council



General

- Doha Round and green goods initiative
- Compliance with WTO rules
- US EU TTIP



Country and region specific

- WTO case Russian Tariffs
- US, Turkey, etc. etc.
- Wood market access Russia, Belarus



China Market Economy

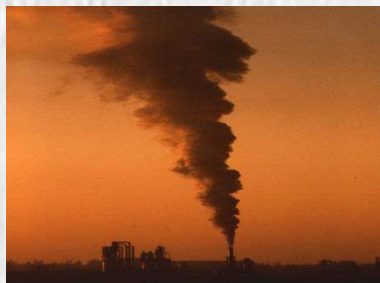
- Anti dumping and anti subsidy cases
- Dissolving pulp – Kraft Sac paper cases
- China Market Economy Status

Energy costs and climate change



EU Emission Trading System

- Carbon Leakage List 2021-2030
- EU ETS structural review – structural changes after 2020



2030 targets

- -40% by 2030 compared to 1990
- Mandatory EU Renewable target, indicative efficiency target



Energy costs and markets

- Energy prices and costs on political agenda
- Energy Tax Directive (in the freezer)
- Electricity and gas markets reform – Energy Union!

Raw Materials



Recycled fibre - EU Waste policy review

- Landfill ban/ ban on incineration of recyclable waste
- Waste Directive / Packaging Waste Directive – targets
- Tissue waste



Certification

- FSC OCP - active dialogue with FSC and PEFC
- Certification impact on EU competitiveness
- GM tree issue



Wood costs

- An end to distorting subsidies for burning wood

Environment and Safety



Industrial emissions

- Pulp and Paper BAT reference document (finalised)



Boiler standards

- Directive on medium-sized combustion plants (MCP)
- BREF document on large combustion plants:
- Waste and waste incineration



Safety

- Food contact and Mineral Oil – also for hygiene papers
- A harmonised EU approach?



Safety

- EU Ecolabel review
- LCA comparisons - Product footprinting



Innovation funding



Horizon 2020

- Optimal use of EU funding opportunities
- Forest Based Sector Technology Platform active role



Bio economy and the Bio PPP

- Founding father/ 15 PPI companies
- Pilot and Demonstration plants



Breakthrough technologies

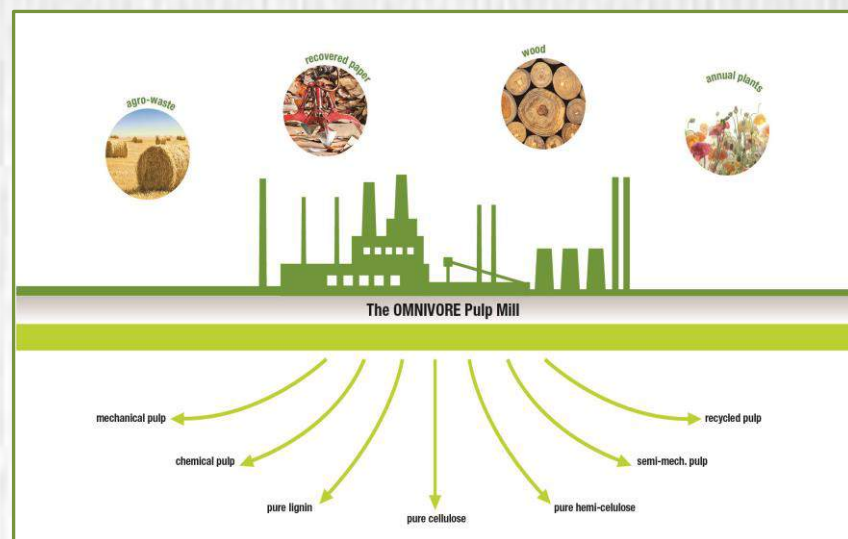
- Two Team Consortia on all concepts, especially
 - Deep Eutectic Solvents
 - Superheated Steam

Deep Eutectic Solvents

FINALIST

A ground-breaking discovery: Deep Eutectic Solvents (DES), produced by plants, open the way to produce pulp at low temperatures and at atmospheric pressure. Using DES, any type of biomass could be dissolved into lignin, cellulose and hemicellulose with minimal energy, emissions and residues. They could also be used to recover cellulose from waste and dissolve ink residues in recovered paper.

The CEPI
**TWO
TEAM**
PROJECT



CO₂

20%

Energy

40%



Thank you!

CEPI aisbl / Confederation of European Paper Industries

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