

# UTIPULP

## Group of European Market Wood Pulp Users

### GENERAL ASSEMBLY

September 18<sup>th</sup>, 2025 (8:30 – 12:30)

**NH Calderon**

**Barcelona (Spain)**

### Minutes

#### Attendees:

Mustapha	<b>ZAUG</b>	PPG (President)
Andrea	<b>BETTIN</b>	BURGO GROUP SPA
Guillermo	<b>BISTUE</b>	PAPELERA DEL ORIA
François	<b>BRUNETAUD</b>	ALLIANCELL
Peter	<b>DONNABAUER</b>	DELFORT GROUP AG
Dieter	<b>DONY</b>	MAGNERA
Martin	<b>DREWS</b>	DIE PAPIERINDUSTRIE
Steve	<b>FREEMAN</b>	CONFEDERATION OF PAPER INDUSTRIES
Daniel	<b>GARCAR</b>	MONDI GROUP
Teresa	<b>GARGIULO</b>	ASSOCARTA
Ute	<b>GIERDEN</b>	KANZAN SPEZIALPAPIERE
Alberto	<b>GIOVANNELLI</b>	SOFIDEL
Antonio	<b>HITA MARTINEZ</b>	GRUPO MIQUEL Y COSTAS (partly)
Klaus	<b>KRIEG</b>	KOEHLER PAPER
Burkhard	<b>KRÜCKE</b>	KOEHLER PAPER
Paul-Antoine	<b>LACOUR</b>	UTIPULP
Jacek I.	<b>LOS</b>	ARCTIC PAPER
Stéphane	<b>MOZDYNIEWICZ</b>	CLAIREFONTAINE
Peter	<b>OFFNER</b>	BRIGL & BERGMEISTER GMBH
Lorenzo	<b>PASQUINI</b>	LUCART
Mariusz	<b>RUPIK</b>	VELVET CARE
Martin	<b>WERNER</b>	FELIX SCHOELLER HOLDING

#### **Guest:**

Alexandre	<b>VIGNON</b>	SAPPI (partly)
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## **1. Introduction**

### **1.1 Welcome/new delegates**

Mustapha ZAOUG welcomes all the participants, and in particular two new delegates, Guillermo BISTUE (Papelera del Oria) and Teresa GARGIULO (ASSOCARTA). Guillermo BISTUE introduces himself and mentions that Luis Fernando ARRUE apologizes for not being able to come at his last meeting.

Mustapha ZAOUG informs the delegates that Klaus KRIEG attends the General Assembly for the last time and then thanks him for his long commitment within UTIPULP (in two separate periods). Klaus KRIEG mentions that Burkhard KRÜCKE now represents KOEHLER PAPER, within the delegation of the German paper association.

The President explains the safety procedure to follow in case of fire.

### **1.2 Legal guidelines for attending UTIPULP meetings**

The Chairman stresses that the Guidelines pertaining to the competition laws have been sent prior to the meeting, and that participants have strictly to comply with.

### **1.3. Approval of the minutes of the last meeting (Milan, May 15<sup>th</sup>, 2025)**

The minutes are approved without amendments.

## **2. Market analysis**

### **2.1. Update of the tariffs**

#### **Status of the file**

PA LACOUR mentions that, on 21 August 2025, the U.S. and the EU issued a Joint Statement agreeing on a “Framework on an Agreement on Reciprocal, Fair, and Balanced Trade.” Under this framework agreement, the U.S. will apply a tariff or a 15% on many goods imported from the EU (including pulp and paper).

On 6 September, President Trump signed an Executive Order that modified the Joint Statement dated 21 August. This Executive Order sets a list of products excluded from tariffs (= tariff “0”). In this list can be found:

- 4703.11.00 Unbleached coniferous chemical woodpulp
- 4703.21.00 Semibleached or bleached coniferous chemical woodpulp
- 4703.29.00 Semibleached or bleached nonconiferous chemical woodpulp

This list applies to imports from all countries (EU and non-EU). The exclusion of these pulp grades took effect for products entered on or after 8 September 2025.

PA LACOUR then reports on the outcome of the survey regarding the impact of the US tariffs (see separate memo) and mentions that the negotiations between the US administration and the various parties will keep going.

## **2.2. UTIPULP position regarding fluff pulp**

PA LACOUR recalls that, during the meeting in May, UTIPULP agreed that there should be no retaliation tariffs on the imports of fluff pulp from the US (no position regarding the other pulp grades).

Although currently no retaliations are applied by the EU, in order to secure the fluff pulp supply on the medium/long term, and in case the EU sets retaliations in the future, it is proposed that UTIPULP keeps on advocating « no retaliation » on fluff pulp.

### **Agreed:**

- ***UTIPULP will keep on advocating that there should be no retaliation on fluff pulp (if retaliations are set in the future).***
- ***Delegates concerned by this issue are invited to be vocal on this issue within their national association.***

## **2.3. Outcome of the survey regarding the market situation**

PA LACOUR mentions that 14 answers have been received. In comparison to the last survey (May 2025), delegates consider that the situation of the market pulp has improved. The index is 77, that is above 50 (50 corresponds to “steady”). Respondents anticipate a slight deterioration in pulp supply conditions, with the index dropping just below 50 (the index is 46) during the coming months.

Regarding the pulp supply, several respondents considered that the current availability is ample, but closures of unprofitable mills could tighten supply. Moreover, no major new softwood capacities are expected, limiting future supply growth. Regarding the pulp consumption, the demand remains weak across all segments, with no clear recovery signals. Some respondents consider that Chinese demand could rebound gradually from H1 2026 after price bottoming.

## **2.4. Report from the National Associations delegates**

The tour de table highlighted some common features among the delegates:

- Low consumption of paper products in most of the EU countries (with a few exceptions like Poland), with no sign of recovery on the short term,
- Uncertainty caused by the US tariffs and, for certain grades, increased competition of paper coming from China (because of the US trade war, overcapacities and reduced consumption in China) at very competitive price.

### 3. Special Subject Dossiers

#### 3.1. UTIPULP request on the standardization of technical Data Sheets (TDS) for pulp

During the last meeting (Milan), UTIPULP members agreed that pulp companies should use a common set of TDS, as well as the same standards and units. Following this request, EPIS was contacted and answered again that *“TDS are a commercial tool, and as such, companies do them one by one”*. EPIS added *“per our lawyer, our meeting cannot discuss them any further”*.

Because of this “lack of willingness”, the EXCCOM considers that there is no reason anymore that pulp buyers engage in the standardization of the sustainability questionnaire.

***Agreed: UTIPULP delegates agree that proposing to market pulp buyers a standardized sustainability questionnaire has to be put on hold as long as EPIS does not feel more engaged in introducing some kind of harmonization in the parameters of the TDS.***

#### 3.2. General Trade Rules

During the Barcelona meeting last year (13 September 2024), the Secretary General of EPIS mentioned that EPIS has unilaterally repealed the GTR. A few weeks later, EPIS modified its position and informed UTIPULP that (i) companies still have the possibility to refer to GTR (ii) EPIS will not discuss in the future the content of this document.

During the meeting in Milan (15 May), UTIPULP delegates decided to have a legal advice on this matter. UTIPULP asked a lawyer specialized in competition regulations to provide a legal analysis (see memorandum).

According to the lawyer, the General Trade Rules constitute a form of standardization agreement. As such *“the content of this document is not sensitive from a competition law perspective. It would be possible to refer to these rules in pulp purchase contracts.”*

The memo also states that *“Finally, in the future, we believe discussions could take place between UTIPULP and EPIS.”*

***Agreed:***

- ***UTIPULP will inform EPIS that there is no legal risk that the two associations work in the future (if they wish so) on an update of the GTR.***
- ***In order to reach more successful results on files discussed with EPIS, the EXCOM of UTIPULP and its counterpart of EPIS will meet in 2026. An on-line meeting would help preparing this joint meeting.***

## 4. EUDR Deforestation Regulation (EUDR)

### **“Readiness” of the suppliers**

The latest survey showed little progress in the ability of the suppliers to meet the requirements of the EUDR. In order to take stock of the situation of the suppliers before the date of application of the EUDR (30 December 2025), UTIPULP will send to the delegates an *ad hoc* questionnaire end of October.

### **Agreed:**

- *End of October, UTIPULP will send to the delegates a questionnaire whose objective will be to rank the suppliers as regard their ability to meet the EUDR requirements.*
- *The outcome of survey will be presented during a meeting scheduled on 5 November (16:00/17:00).*
- *UTIPULP Secretariat will ask the support of a lawyer to secure that the survey and the results of it will perfectly comply with the competition regulation.*

### **EUDR Implementation: latest developments**

PA LACOUR then presents the latest developments regarding the EUDR, both as regards the documents available and the political process.

Discussion between the delegates refers to the following items:

- Brief presentation of the “pooling system” that has been developed by several trade associations in Germany,
- Situation of the product that will be EUTR but not EUDR (will they have a DDS number?),
- General feeling that the EUDR will not prevent non-EU companies from entering the EU-market,
- Question mark whether the next Omnibus regulation, that will be unveiled in October, will include a reopening of the EUDR,
- Diverging views within the paper associations whether the EUDR should be reopened (at least to improve the legal security of the companies, as there is a gap between the regulation and the way it is implemented).

## 5. Association Topics

### **5.1 EXCOM composition**

The EXCOM composition is unchanged and is as follows:

Mustapha ZAUG	President	COPACEL
Peter DONNABAUER	Member	AUSTROPAPIER
Alberto GIOVANNELLI	Member	ASSOCARTA
Norman SNEL	Member	VNP
Jacek LOS	Member	SPP

## 5.2 Relations with EUROPULP

In spring 2025, EUROPULP was circulating inaccurate information about a bill that would not have been paid by UTIPULP for the participation of the UTIPULP delegates to the EUROPULP Seminar.

The situation has now been clarified: all pulp buyers (but not the people working in an association) are invited free of charge to the Seminar and dinner. For people working in an association, the cost of the Seminar and dinner will be covered by UTIPULP.

## 6. Any other business

PA LACOUR mentions that he has been invited by the Polish association to make a speech on the “hot topics” of UTIPULP (EUDR, US tariffs) during an event taking place on 24 September.

One delegate asks whether the General Assembly should take place on Monday (during the Barcelona pulp week). After consideration of the pro and cons, the current organisation, with the General Assembly on Thursday, will be kept.

## 7. Close out

### 7.1 Date & location

PA LACOUR recalls that the next meetings will take place in Hamburg, at the following dates:

- Wednesday **15 April 2026**: EXCOM (15:30/16:45)
- Social event and dinner (Elbephilarmonie)
- Thursday **16 April 2026**: General Assembly (8:30/12:30) followed by a lunch.

UTIPULP made a block reservation at the AMERON Hotel in Hamburg at a special rate (deadline for booking: March 18, 2026).

The Chairman thanks the participants and closes the meeting.

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