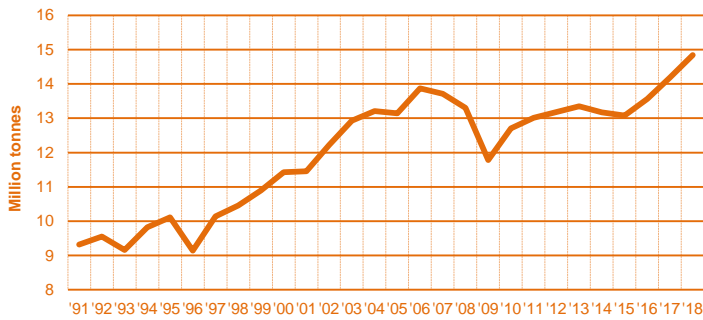


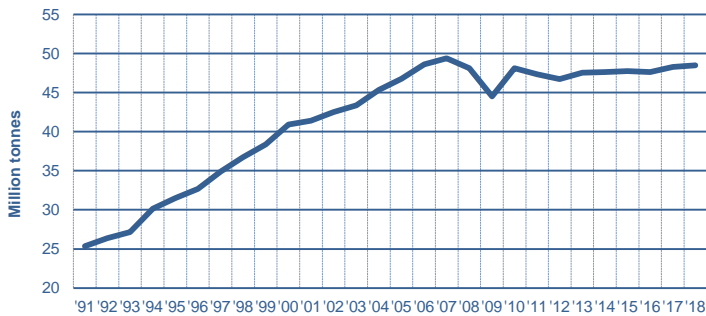
### Production of market pulp in CEPI countries



### Utilisation of paper for recycling was relatively stable, with a limited increase of 0.4%

The utilisation of paper for recycling by CEPI members increased by around 0.4% compared to 2017 level to reach 48.5 million tonnes.

#### Utilisation of paper for recycling in CEPI countries



### CEPI countries in 2018

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



#### More information on CEPI Statistics

CEPI statistics are collected on a regular basis from the member National Associations.

The compliance of our statistics reports with EU competition laws is periodically checked by a law firm.

Furthermore, CEPI has commissioned Deloitte to issue each year a limited assurance statement on its data quality.

Two annual reports are available on CEPI website:

[www.cepi.org/topics/statistics](http://www.cepi.org/topics/statistics)

- Preliminary Statistics 2018 - February 2019

- Key Statistics 2018 - June 2019

### Statistics Subscriptions

More detailed CEPI statistics are available by subscription:

[www.cepi.org/topics/subscribe-to-statistics](http://www.cepi.org/topics/subscribe-to-statistics)

### European Association Awards 2019

CEPI statistics have been shortlisted as a finalist within the category "Best Provision of Industry Information and Intelligence".

<http://europeanassociationawards.com/finalists/>



### For more information on CEPI statistics

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CEPI aisbl - Confederation of European Paper Industries

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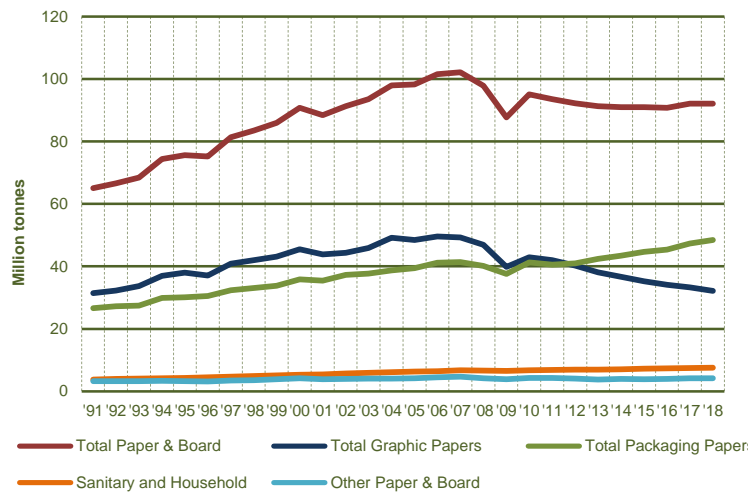


## Paper and board production stable and market pulp production up in 2018 compared to 2017

CEPI member countries' paper and board production was stable in 2018, compared to the previous year, according to preliminary figures. Total production in 2018 reached 92.2 million tonnes. 2018 saw new capacities coming on stream but also closures. Combined with the upgrade of existing machines, this translated in a net capacity increase of 1.3 million tonnes.

The production stability observed in Europe contrasts with the reduced global paper and board production – -0.6% in 2018 compared to 2017 – to 417 million tonnes according to very first estimates. This reduction was mainly driven by China, whose production decreased by close to 4%. Paper and board production in Japan, South Korea and the United States has also declined, whilst production in Canada, Russia and several emerging countries (India, Indonesia and Mexico, for instance) increased.

### Production of paper and board in CEPI countries



## Increased production of packaging paper and board offsets the decline in production of graphic papers

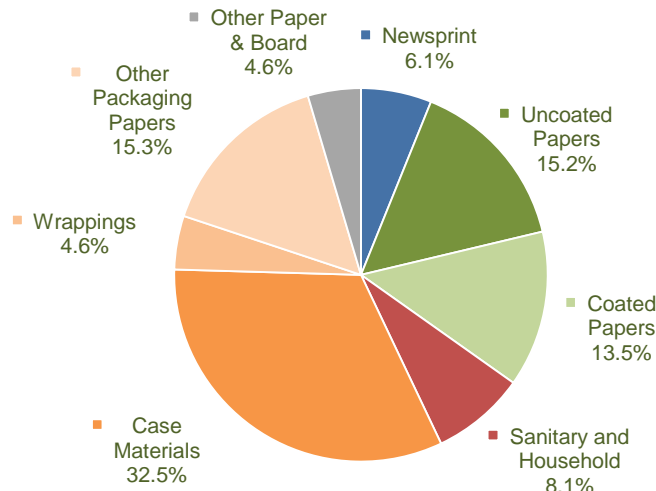
The structural divergence in the production trends for graphic grades and packaging grades was confirmed in 2018.

The overall production of graphic grades fell by around 3.6%, with the highest decrease of 8.9% recorded in newsprint, used mainly for daily newspapers.

The production of graphic papers in other areas - magazines and catalogues, direct mail, directories, etc. – shows very different trends from one grade to the other. Output of coated mechanical paper remained unchanged whilst production of coated woodfree grades decreased by 7.4%. In contrast with other graphic grades, uncoated mechanical paper saw its production increase by 1.2%. The production of uncoated woodfree grades - mainly office paper - is estimated to have decreased by 2.5%.

Overall this means that production of coated and uncoated graphic papers decreased respectively by 3.8% and 1.1%. Production of woodfree graphics showed a large decrease of 4.7% whilst output of mechanical graphic papers slightly increased by 0.6%.

**Production of paper and board by grade in CEPI countries in 2018**



The production of packaging grades is estimated to have increased by around 2.4% compared to 2017, despite the ongoing trend towards light-weighting and resource efficiency. Within the packaging grades, case materials - mainly used for transport packaging and corrugated boxes - recorded a 2.7% increase in production. The output of carton board plus other packaging board - small goods packaging or book covers for instance - grew by 2.8%. In contrast, the production of wrapping grades - used for paper bag production - showed a slight decrease of around 0.6% according to preliminary estimates.

The share of packaging grades accounted for 52.5% (51.3% in 2017) of the total paper and board production, with graphic grades accounting for 34.8% (36.2% in 2017).

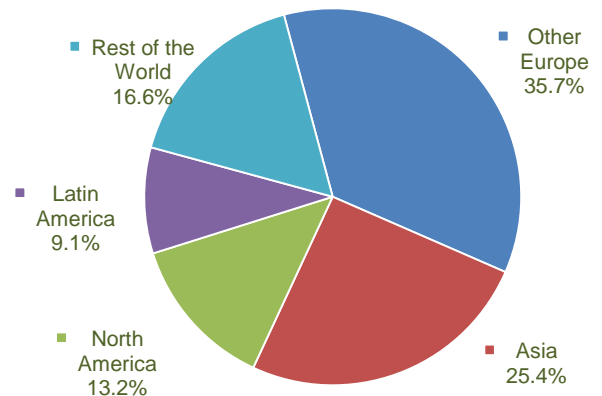
Sanitary and household manufacturers' output increased by about 1.0% compared to 2017 and accounted for 8.1% of total production. Output of all other grades of paper and board – including some industrial and special purposes – remained virtually unchanged (4.6% of total production).

**Paper and board deliveries by CEPI countries remain unchanged**

Based on the first 9 month cumulative data, it is expected that paper and board deliveries for the year remained unchanged compared to 2017, mirroring production stability in Europe. By the end of September 2018, deliveries of graphic grades had decreased by 2.5% whilst deliveries of packaging grades rose by 1.7%.

Exports had slightly risen by 0.4% by the end of September 2018, with exports to North America and Latin America increasing by 9.8% and 4.2% respectively. Exports to other European countries registered a more limited progression (+0.9%), while those to Asia declined by 5.6%. European countries remain the main markets for exports with 36% of total European exports; Asia accounts for 25%, North America 13%, Latin America 9% and all other countries 17%.

**Exports of paper and board by region in 2018**



Preliminary indications show that imports of paper and board into the region have increased by around 2.5% compared to 2017. Imports from other European countries declined by 1%, in contrast with all the other regions which saw growth: North America +3.3%, Latin America +6.5% and Asia +7.6%. Other European countries account for 43% of all European imports, North America 31%, Asia 12%, Latin America 6% and the rest of the world 9%.

**Overall paper and board consumption increased by around 0.5%, the 5th consecutive year of growth**

The overall consumption of paper and board in CEPI countries in 2018 increased by around 0.5% compared to 2017, based on the latest data available. This is the 5th year in a row registering growth, thanks to the favourable economic environment in the EU and at global level.

EU GDP is expected to grow at a slightly lower pace in 2019: +1.9% after +2.1% in 2018.

**Total pulp production increased by 0.5% but market pulp production showed a strong increase of 4.6%**

The production of pulp (integrated + market) has increased by 0.5% compared to the previous year, with total output of approximately 38.0 million tonnes. Output of mechanical and chemical pulp has increased by around 0.3% and 0.6% respectively compared to 2017.

Output of market pulp showed a stronger increase of 4.6%, as a consequence of substantial investments in new capacities and growing demand.

**Quarterly production of paper and board in CEPI countries**

