

Sustain

Sustainability Report / 2009
[Confederation of European Paper Industries]



About this report...

CEPI is the Confederation of European Paper Industries, a Brussels-based non-profit making organisation regrouping the European pulp and paper industry and championing this industry's achievements and the benefits of its products. CEPI mission is to promote the members' business sector by taking specific actions notably, by monitoring and analysing activities in the areas of industrial policy, environment, energy, forestry, recycling, research and trade.

CEPI also works towards increasing the knowledge of its members in specific technical areas, as well as to facilitate the flow of information among companies and associations.

Its 18 member countries* [16 European Union members plus Norway and Switzerland] represent some 800 pulp, paper and board producing companies across Europe, ranging from small and medium sized companies to multi-nationals, and 1200 paper mills. Together they represent 27% of world production.



The Global Reporting Initiative (GRI) provides standardised criteria by which public and private bodies can benchmark, chart and report progress in their activities in economic, environmental and social terms. This sustainability report is guided by the GRI criteria and has achieved the B+ requirements with A+ being the highest possible ranking. This is a great example of the effort CEPI is putting in improving data collection and forging agreements amongst members.

Sustainable: sums up a set of values we are learning to acquire. Human activities should respect the balance of nature. For the paper industry it means acting responsibly in the interests of stakeholders, forest and urban environments and natural resources.

Our message reaches policy makers, official bodies and member organisations with common interests, supply chain partners, paper and board consumers, opinion leaders, today's employees and tomorrow's new recruits. Through these audiences we expect also to reach citizens and consumers.

This report: assimilates information and aggregates data from 2007 and 2008 that companies and member organisations voluntarily provide, complemented by our own research. We believe in good faith the process is fully inclusive, transparent and stands up to scrutiny.

Additional improvements to CEPI's reporting of sector performance to 2009 were made thanks to guidance from audit firm Plenum, whose constructive analysis has resulted in comprehensive coverage of salient information and key data. The report is endorsed by the CEPI board.



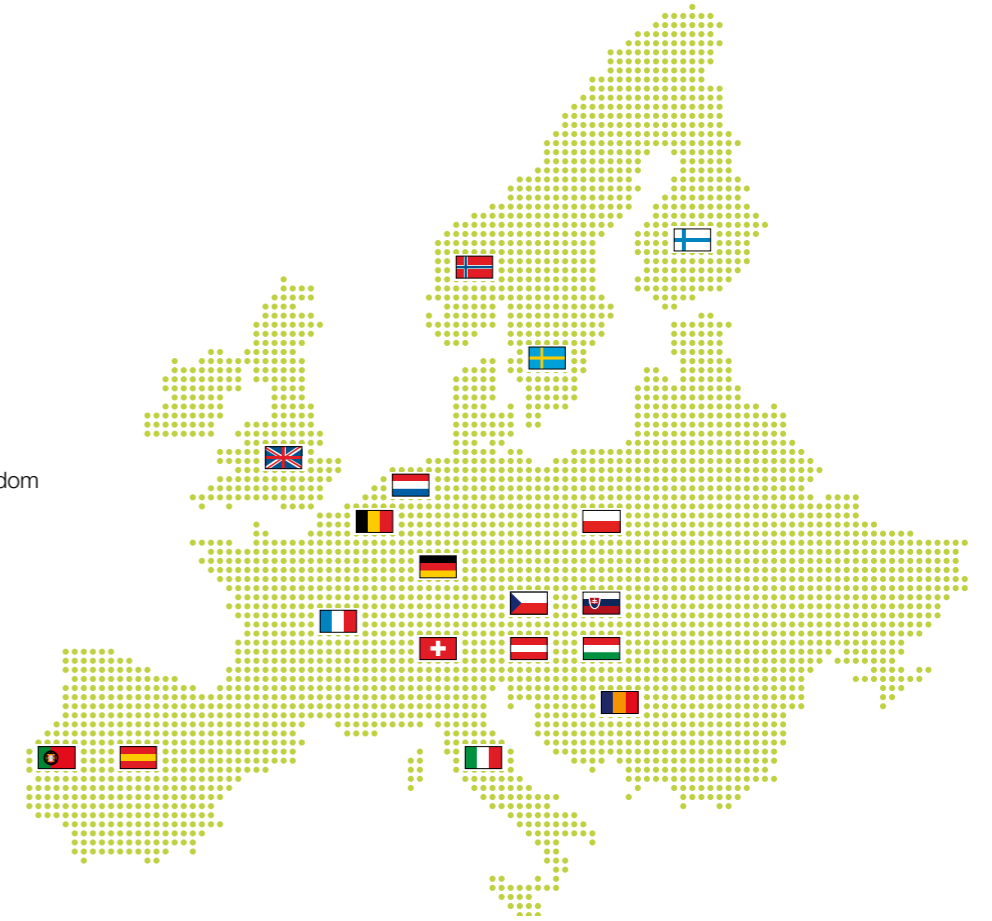
*Austria, Belgium, Czech Republic, Finland, France, Germany, Hungary, Italy, the Netherlands, Norway, Poland, Portugal, Romania, Slovak Republic, Spain, Sweden, Switzerland, the United Kingdom.

For further information: Teresa Presas, Dr HC, CEPI Managing Director,
Daniela Haiduc, Communications and Public Affairs Manager.
Subject areas in this report can be found further discussed and explained at www.cepi.org

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- CEPI MEMBERS in EUROPE**
-  Austria
 -  Belgium
 -  Czech Republic
 -  Finland
 -  France
 -  Germany
 -  Hungary
 -  Italy
 -  Netherlands
 -  Norway
 -  Poland
 -  Portugal
 -  Romania
 -  Slovakia
 -  Spain
 -  Sweden
 -  Switzerland
 -  United Kingdom



Dear Reader,
While preparing this fourth 2009 Sustainability Report, the industrial world has been shaken to its roots, global trade disrupted and we are left with a legacy of widespread social upheaval from failing businesses and job losses. We also wait in hope that December's COP15 will see the world waking up and acting as one to avert the risks of climate change in a globally inclusive way.

The experience has added validity to the European paper industry's exacting standards of reporting on the sustainability of its processes, systems and strategies. The results of our analysis of industry performance over an extraordinary two-year period underline that economic, social and environmental elements are interconnected.

Foreword...



Teresa Presas
Managing Director

Since 2007, concern over global water shortages has risen at all policy levels. The paper sector has knowledge to share on making best use of water and is open to learning more about managing risk. CEPI was pleased to become the first industry federation member of the European Water Network and to be collaborating on a water footprint methodology.

We made good progress on better product design for recycling in the past two years. CEPI is also assessing the impact of transport on carbon emission and assisting the companies to establish their carbon footprints. We have high hopes that an industry handbook on protecting forest biodiversity - a mine of information and best practice - will multiply the positive impacts of local initiatives across Europe.

The sector is carving out a low-carbon, resource-efficient future. Green energy generation, bio-refinery and innovative integrated business models will transform the industry. Extracting full value from wood will be key to economic and social stability and company profitability. And CEPI is supporting applications to access European research funds to speed delivery of green technology benefits for society, industry and the environment.

Headline industry news is that paper has become the first material able to trace back secondary raw material to the source. This is significant in the context of the revised 2008 European waste legislation, which is now compatible with industry action to realise the potential of paper in a recycling society.

Our positions on energy, water, biodiversity of the forests and air emissions, are strengthened by technical and academic expertise from numerous sources. With valuable input and support of our members, stakeholder groups and external partnerships in Europe and worldwide, the paper value chain contributes increasingly to the transition to a low-carbon society, in ways we explain in this report.

Meanwhile, we are 'greening' our offices and joined a local scheme that will lead to CEPI gaining an environmental label awarded by the Brussels Institute for Environmental Management. This we hope will inspire many others to green up workplaces across Europe.

Thank you very much for your interest

Teresa Presas,
*CEPI Managing Director and ICFPA President

Magnus Hall,
CEPI Chairman and Holmen CEO

Brussels, 30 October 2009



Magnus Hall
Chairman

This snapshot taken every two years shows the European pulp and paper industry drawing on its potential to promote the social, environmental and economic wellbeing of Europe's citizens. We want the European industry to be the leader in this field in the global pulp and paper sector.

Staying faithful to our sustainability agenda, even in difficult prevailing economic conditions, is essential.

It goes hand-in-hand with goals to be competitive in world terms and strengthen the market for paper products.

Emerging ecological risks and regulation issues result in collaborations with many stakeholders and expert

networks. In line with European decision making, CEPI adopts the precautionary principle in all its activities and acts to ensure that the paper industry does not cause harm to its stakeholders and customers.

Paper is a credible partner in the evolution of low-carbon scenarios. It is made of a renewable raw material and its production relies mostly on renewable energy.

The sector is characteristically responsible and invests strategically in technical research and insight studies. We work to optimise our use of natural resources; extend the role of paper in our lives; and improve the health and safety of people and the environment.

Vision & Strategy

Materiality

Each subject area contained in this report is materially relevant because it can and does impact, directly or indirectly, on the sustainable development of the industry, and the industry can and does, directly or indirectly, influence change or improvement in the social, economic or environmental related topic in question.

This report is a tool for making better-informed decisions that fit the European vision of a society that uses natural resources efficiently, innovatively and wisely.

Reporting Methodology

Data generation at CEPI relies on our national association members and pulp and paper company measurements. Standardised definitions were developed for all indicators. The completeness and accuracy of reported data are confirmed by CEPI's Statistics department. Cross-checks (with other sources used for industry-specific data) are performed systematically. Feedback and commenting loops with the reporting members ensure high data quality. If we identify limitations in the coverage or reliability of data, we disclose them and introduce measures to improve the reporting process.

Data Collection

Since our last Sustainability Report, published in 2007 and covering figures of 2005 and 2006, CEPI has moved responsibility for the environmental data to the Statistics department and was able to improve the quality of the data reported. Due to revisions of some national associations' data, we had to adjust our data on energy consumption, CO₂ emissions, landfill and air emissions reported in past years. Our figures in this edition cover the years up to 2008 or 2007. Figures exclude data from Romania and Hungary as we were unable to obtain relevant data from those countries; and we do not include figures from Poland before 2003. Sometimes indicators do not apply to all our members; exceptions are explained in footnotes. In some instances we felt it relevant to include quarterly figures from 2009. Occasionally, updates on economic indicators necessarily relied on data from external consultancies; in each case the source is credited in a footnote.





Governance &

Open and transparent communication with all stakeholders is the only option for an industry that is truly responsible, credible and sustainable.

Martyn Griffiths,
Communications and Public Affairs Director

Best Practice

“From paper to publishing – creating value for Europe”



CEPI joined 10 Brussels-based European trade associations linked to paper and print media at the European Parliament to discuss the potential for sectors from papermaking to publishing to create value for Europe. The event hosted by Jorgo Chatzimarkakis MEP included a panel debate with representatives of environmental NGOs, the European institutions and the paper value chain. The debate drew attention to issues in responsible sourcing, sustainable production, effective recycling and waste management. It underlined where the value chain had been active and identified where effort was needed in the future.

The Print Media Group is an established network that meets regularly to share best practice and find ways in which the print media value chain can work together to deliver clear and consistent messages to European decision makers and the industry at large.

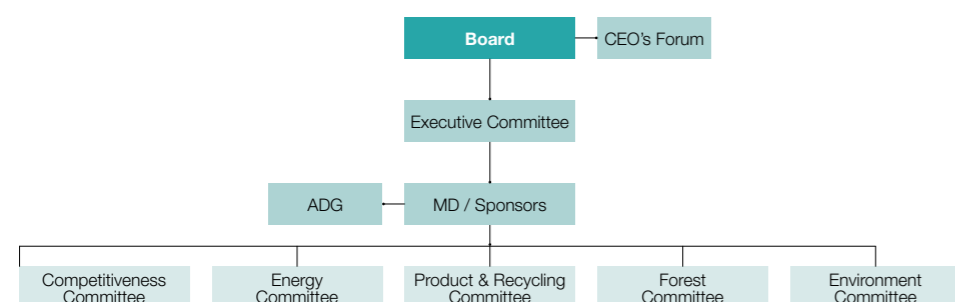


CEPI Secretariat in September 2009 (from left to right): Ariane Crevecoeur, Statistics Assistant / Nigel Barnwell, Technical Manager / Erik Kilby, Statistics Manager / Nathalie Cabuy, Finance Manager / Marco Mensink, Energy and Environment Director / Bernard Lombard, Trade and Competitiveness Director / Catherine De Norre, Assistant / Andy Wooler, Social Affairs Manager / Bernard de Galember, Forest and Research Director / Jernej Vernik, Energy and Research Manager / Bernadette Timmers, Communications Assistant / Teresa Presas, Managing Director / Ulrich Leberle, Raw Materials Manager / Suzanne Meidner, Receptionist and Administrative Assistant / Noura Younes, Environment Assistant / Vinciane Chantraine, Personal Assistant / Sophy Ashmead, Recycling Assistant / Bengt Davidson, Environment Manager / Jori Ringman, Recycling and Product Director / Daniela Haiduc, Communications and Public Affairs Manager / Martyn Griffiths, Communications and Public Affairs Director

& Stakeholder Dialogue

What we do

CEPI represents and coordinates activities across the entire pulp and paper industry in Europe. Our approach and structure ensures we are open, flexible and responsive. The secretariat implements board decisions recommended by the committees. We also welcomed one new member - the Romanian paper association, Rompap, in 2008.



The **CEPI Board** is the ultimate decision-making and governance body in CEPI. It is assisted by a more operative Executive Committee / The **Associations Directors Group (ADG)** is the senior advisory group to the CEPI Managing Director. / **Sustainability Strategy** and **Communication** are transversal issues. / **Research** is under direct leadership of the Managing Director. / **Social Affairs** is supervised by the ADG. / The **Committees** are responsible for strategy and political perspective in the policy areas. / The **Competitiveness Committee** is a support Committee that crosses all policy areas. / **Issue Groups** are formed as needed, to work on the problems/issues identified by the Committees.

Who we are

The CEPI secretariat is located in Brussels where Managing Director Teresa Presas heads a 20-strong team. Directors and Managers are appointed for their expertise in key policy areas, namely forestry and research, environment and energy, competitiveness and trade, recycling and products as well as in communication. The national associations nominate members to standing committees, which take strategic views on those five areas of interest. Social affairs, research, food contact, statistics, trade and transport issues are covered by specially formed groups. The management board comprises national association representatives and company chief executives. The chairman from 2007-2009 has been Magnus Hall, CEO of Holmen Paper.

Highest governance: The Board of CEPI receives no remuneration for its activities and the staff of CEPI is subject to periodical evaluation. The Board has clear voting rules for decision making and anti-competition rules are applied to all meetings.

Each area of activity has a chosen sponsor responsible at Executive Committee level reflecting the expertise needed for these mentoring roles.

An agreed work programme is developed and implemented each year and the Board ensures that all activities reflect environmental, economic and social topics. In all meetings CEPI follows its “Guidelines for Compliance with EU competition rules” that were especially prepared for CEPI.

Stakeholder and supply chain action will multiply and spread the positive effects of sustainable thinking. The good practices we recommend aim to improve the supply, the availability and use of resources. These are developed using valuable knowledge we gain from stakeholders.

CEPI is a channel for communication between our numerous stakeholder groups in industry and commerce, policymakers and decision makers. We are developing and issuing best practice guidelines in several areas in order to improve the performance of our sector throughout. CEPI also carries out surveys and studies that help support our activities and communication on a regular basis.



We are active in external networks such as the European Commission's Retail Forum set up in 2009 to find workable paths to sustainable consumption and production. We also belong to the European Water Partnership, Business Europe Working Groups, industry alliances, the Water Footprint Network and the International Council of Forest and Paper Associations and the Alliance for a Competitive European Industry.
 (*See page 58 for a list CEPI memberships).

We forge links with the entire paper chain from the forest to packaging and labels, graphic and newsprint paper, hygienic tissue and recovered papers. These cross-category networks share experiences and knowledge, and make full use of their collective resources.
 (*See page 58 for a list of networks CEPI works with).

We run workshops to pool insights from business, industry and interest groups. This achieves balance and clarity in our understanding of complex, multi-disciplinary issues and well supported policy positions. Successful events in the last two years focused on carbon and water footprinting, renewable energy, contaminants detection in recovered paper and assessing transport carbon emissions, and sustainable wood mobilisation.
 (* See page 56 for a list of CEPI events).

Our networking event of the year, European Paper Week, attracts a cross-section of the stakeholder community to Brussels for three days every November. Apart from the CEPI Annual Meeting, open sessions are opportunities to hear experts talk on topical themes and engage in debate on topics close to the hearts of everyone in the paper chain.
www.cepi.org/epw

Our stakeholders speak out

We asked stakeholders how our sustainability reporting could gain value and credence as a reference document. The forestry, newspaper publishing, financial services, shippers, paperboard converting and printing sectors gave views on which important issues the report should cover, notable progress they have seen over the past few years and areas calling for improvement. CEPI heard how it could reinforce relationships with stakeholders. Recurrent themes are represented by selected responses along with observations specific to individual stakeholders.

ENPA Comment:

“Stakeholder consultations would be better held soon after the report is published when fresh in people’s minds”

This practical step would allow early discussion on ways to further improve working practices with stakeholders as well as raise the bar for our 2011 Report.

Intergraf Comment:

“In the current financial crisis, what is important for a company to be sustainable? From a long-term perspective is it only growth and revenue, or is it also to provide jobs, contribute to society, etc.? The aspect of Corporate Social Responsibility should be included”

Strategies allowing to keep jobs will be important in the short-term. Eco-design innovation and exploring the economic potential of bio-energy and waste management will offer long-term sustainability.

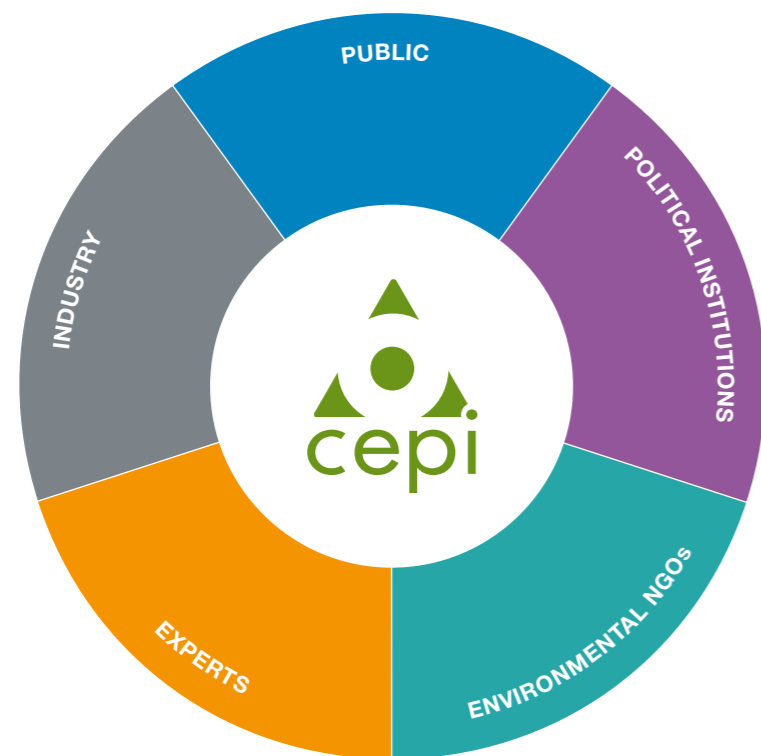
NORDEA Comment:

“Aim for a better balance, putting all the facts (including any negatives) on the table... The key message for 2009 should be that you are taking sustainability and environmental issues extremely serious and while you are not perfect, you have improved - and will continue to do so”

CEPI has taken action:

- in a manifesto for competitiveness and employment (June 2009) arguing for equal treatment of the world's pulp and paper producers, trading conditions that support European industry and ending protectionism around the world
- securing or improving access to raw materials
- communicating our environmental message to industrial consumers and high-level decision makers
- supporting an on-going technological and structural transformation
- monitoring the challenge from electronic media
- introducing a recovered paper identification system to improve product quality
- coordinating industry work in relation to the EU climate and renewable energy package, and assisting the Commission and governments with the design of plans for renewable energy and the benchmarks for EU Emissions Trading
- assisting industry implementation of REACH (Registration, Evaluation and Assessment of Chemicals) legislation

CEPI Circle of Stakeholders



WWF Comment:

“The industry should calculate a net figure for its carbon footprint that does not assume renewable energy is carbon neutral and it should undertake a science-based industry impact assessment on biodiversity”

We report on total energy consumption, CO₂ emission and electricity consumption. In our carbon footprint framework, we discuss both biogenic and fossil emissions. However, international standards focus on fossil carbon only and we use the IPCC default values for emissions from energy use. In this sense we indirectly do report what WWF is asking for. We cover and report on most topics on WWF’s priority list. The areas mentioned above were exceptions, which we will further discuss and investigate.

EMCEF Comment:

“The Sustainability Report could interest a broader audience and it should be disseminated more widely”

The European Mine, Chemical and Energy Workers Federation (EMCEF) plans to circulate the Report among its affiliates. The respondent mentioned that EMCEF-CEPI activities since 2007 made progress in the social affairs area, but more could be done together towards the zero-accident target. Education and training could be linked to health and safety, for example.

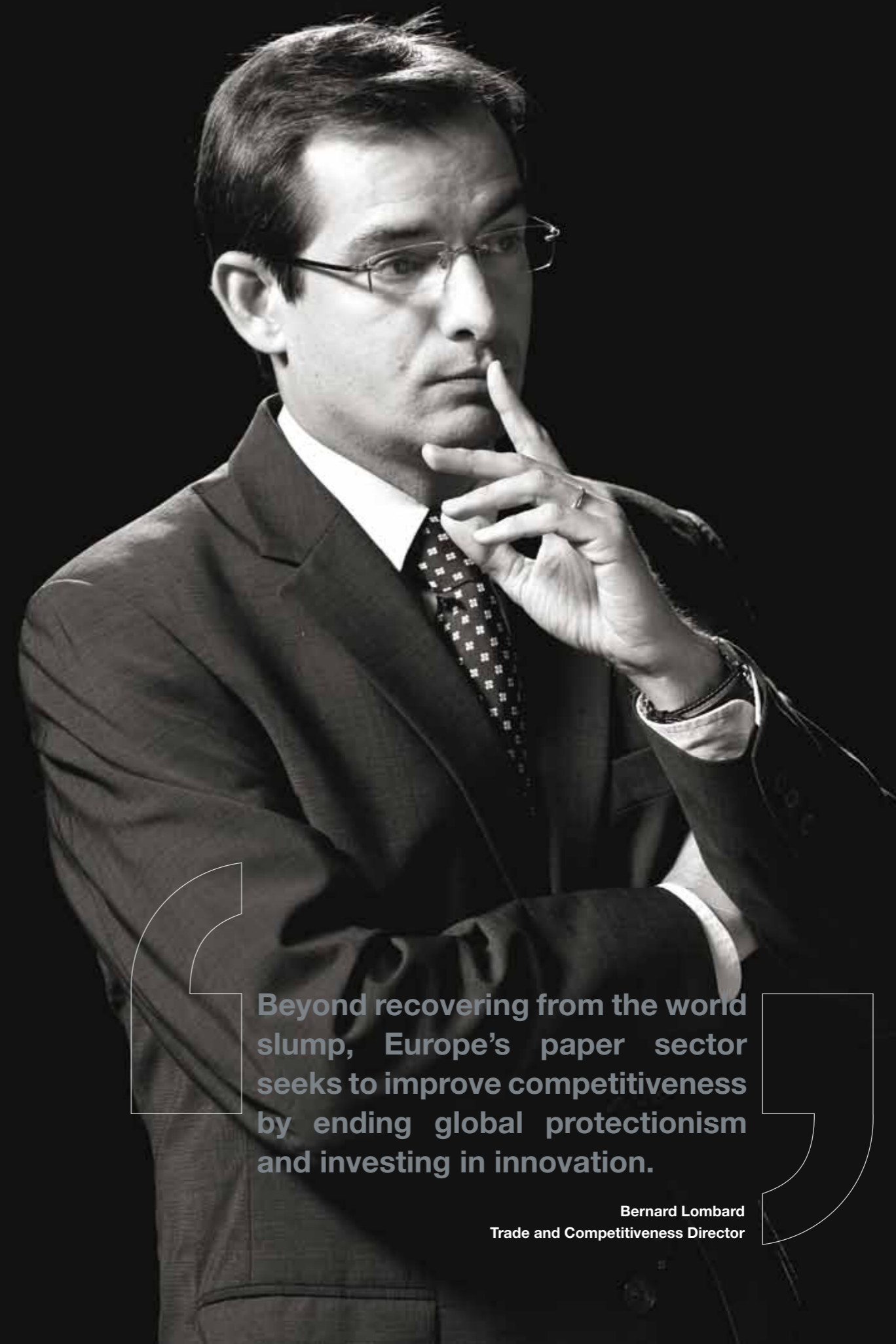
CITPA Comment:

“The industry fails to pass over its key messages in a concise and understandable manner. Key data needs to be used to support key messages. If the industry succeeds in this, it can address the public and consumers as well as the stakeholders”

We are working on standard methods for monitoring and reporting energy consumption and water use and green transport procurement. We issue guidance on best practice that is within EU competition rules and urge members to feed back results.

Our survey included EMCEF (industrial workers), WWF International, NORDEA (financial services, Nordic and Baltic region); FAO (advisory committee on paper and wood products); MEP V. Mathieu; MCFPE (Ministerial Conference Protection for European forests); DG Environment, European Commission; CITPA (paper and board manufacturers); ENPA (newspaper publishing); ERPA (recovered paper sector); Intergraf (print industry); DG Enterprise, European Commission; Eugropa (paper merchants of Europe); European Shippers’ Council.

2



Beyond recovering from the world slump, Europe's paper sector seeks to improve competitiveness by ending global protectionism and investing in innovation.

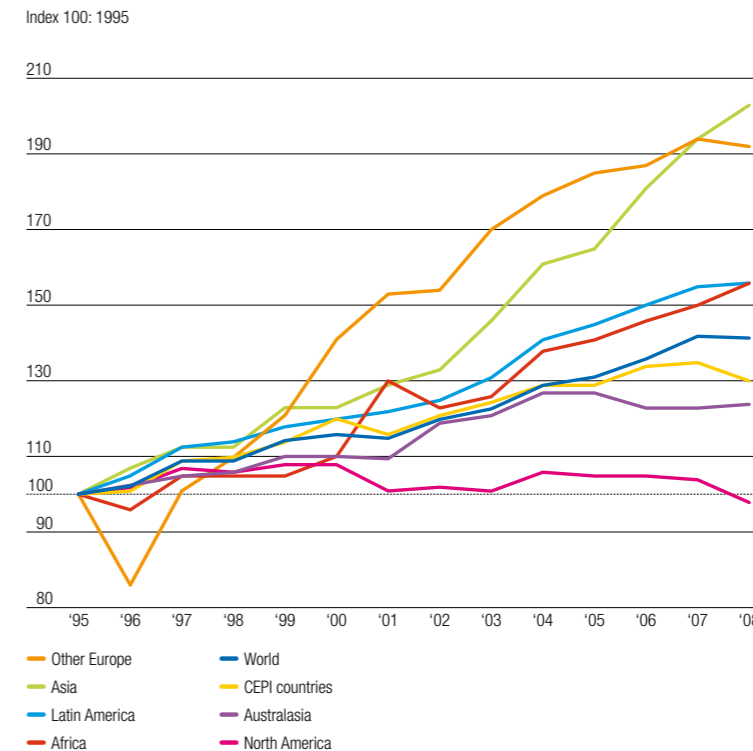
Bernard Lombard
Trade and Competitiveness Director

CEPI is working today to integrate the climate, energy and competitiveness issues in one vision for industry policy and working towards the future.

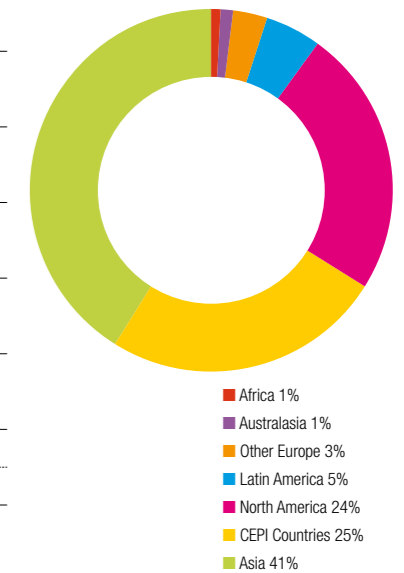
Economy & Competitiveness

- between 2008 and 2009 Europe's paper industry shrank by around 15%
- continuous sustainable development and innovation will make the sector attractive to investors
- European producers have seen competition increase over the last few years, particularly from the emerging countries
- a new global climate agreement should be secured in Copenhagen and result in a fair and equal burden between the EU and competitor pulp and paper producing countries
- global protectionist measures contrast with an EU open market and impair our competitiveness

Paper Production Evolution by Main Regions (Million Tonnes)
Source: CEPI and RISI



Paper Production 2008
(390 million tonnes)



Management approach

Dedicated resources are employed to monitor international trade, economic activity and competition and CEPI works to promote the economic benefit of the paper sector in Europe. We have a designated director who is responsible and who reports to the Managing Director. He oversees the monitoring of key economic KPIs and ensures that the statistics department collects and analyses the correct and relevant data.

The financial crisis brought sales figures tumbling down. Global production of paper dropped by nearly 4% in 2008. The European industry's total net sales similarly contracted by 4% to 78.3m. Its output of printing and graphical grades fell by nearly 5% at the end of 2008, and packaging by 3%, although hygiene and household rose by 1%. Direct employment suffered a loss of 11.000 jobs up to the end of 2008, by which time 55 plants were shut down. The pulp and paper industry at the end of 2008 directly employed 243 300 people of which about 60% in rural areas. A further 20 closures came in the first nine months of 2009*.

International competition and impact of global pricing

The European pulp industry produced 26% of the world total. Paper exports in 2008 accounted for nearly 17 MT of Europe's production total of some 99 MT. Less than 6 MT (5.4 MT) of Europe's paper needs (87.9 MT) were imported. But prior to a flattening in 2008, the trend had been upwards since 2005. We forecast that imports will resume and keep prices under increased pressure.

*We are using 2009 figures here as most relevant portraying the current situation of the European paper industry

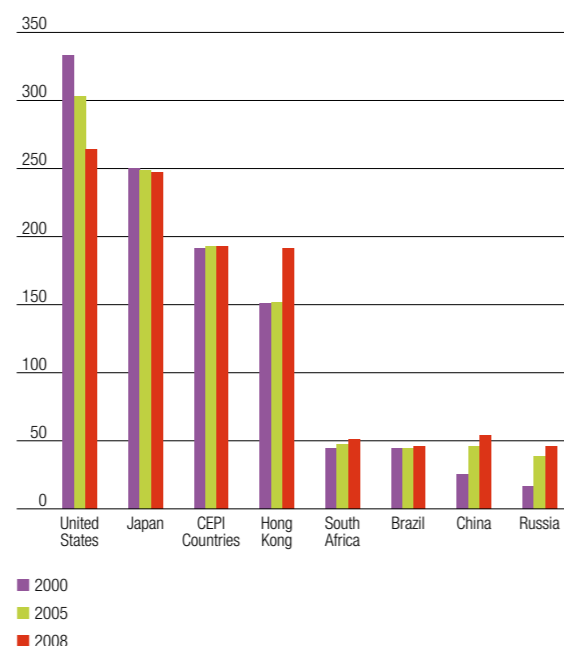
The design of the post-2012 EU Emissions Trading Scheme will have a profound financial impact on the European paper sector. We are exploring viable low-carbon practices that are cost efficient and will enhance European competitiveness.

We favour international agreements with equal treatment of industry outside Europe. No such agreements could lead to paper production from outside the EU substituting the European production, also referred to as 'carbon leakage'.

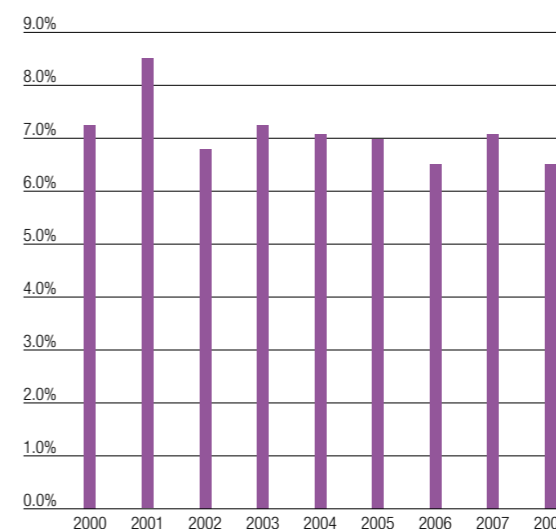
Protectionist measures in competing pulp and paper producing countries restrict export trade as well as raw material imports for EU members. Europe operates an open market. Excessive fiscal support for biomass, discriminatory tariffs and other trade policy tools are harming Europe's paper producers.

(*See page 56 for International Trade Data)

Paper and Board Consumption per Capita in kg - 2006 data
Source: CEPI and RISI



Investment / Turnover Ratio in the Pulp & Paper Industry, CEPI Countries - 2008 data
Source: CEPI



European forests our main source of supply

In 2007, CEPI countries only sourced 16% of its pulp from outside the CEPI region: Brazil 6%, USA 4%, Canada 2%, Chile 2%, Russia 1%. The majority is being produced and bought in Europe directly.

CEPI countries contributed 22.6% and other European producers 3.9% of total world pulp produced in 2007. That year, the CEPI region converted 25.8% (-1%) of the world total pulp and world production was up by 1.1% compared to 2006.

Forests across the EU supply over 80% of the wood and pulp our industry needs, offer resource security and direct employment. The transition to a low-carbon economy creates opportunities for a restructured industry designed for a new era. Along with energy efficiency and new products there is potential for green energy, bio-fuels, bio-based products and chemicals production which will be key to profitable and sustainable business models.

Best Practice

European Paper industry launches Manifesto for Employment and Competitiveness

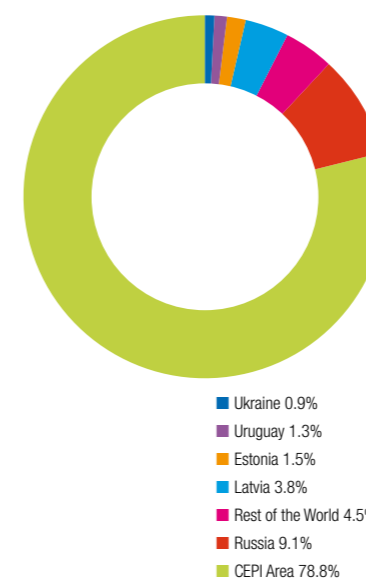
European leaders of the pulp and paper industry launched a manifesto for competitiveness and employment during a meeting with the European Commissioner for Enterprise and Industry, Günther Verheugen, in Brussels. They sounded a stark warning that unless solutions are found to respond to the economic crisis and that a more rational policy making approach is introduced the competitive transformation of their industry, and indeed all European industry, will not be sustained.

The key areas where the industry urges the European Commission to act include:

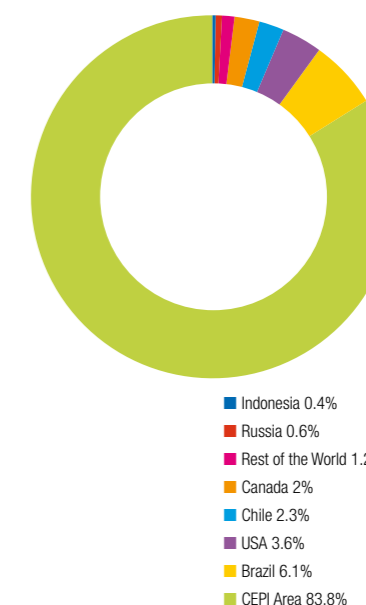
- ensuring a better balance in policymaking between advocates of environmental, competitiveness and employment interests
- allowing Europe to compete with lower energy cost competitors
- creating winners not victims in the EU Emissions Trading System
- boosting the availability of raw materials and market access
- applying flexibility to competition rules to facilitate restructuring
- fighting protectionism in competing countries
- turning innovation into a reality

More than ever, Europe needs to reconcile competitiveness and sustainability for its industry to thrive in a global market. For the European pulp and paper industry competitiveness is economics. Meeting this challenge depends largely on policy makers.

CEPI Wood Consumption Origin in 2007



CEPI Pulp Consumption Origin in 2007

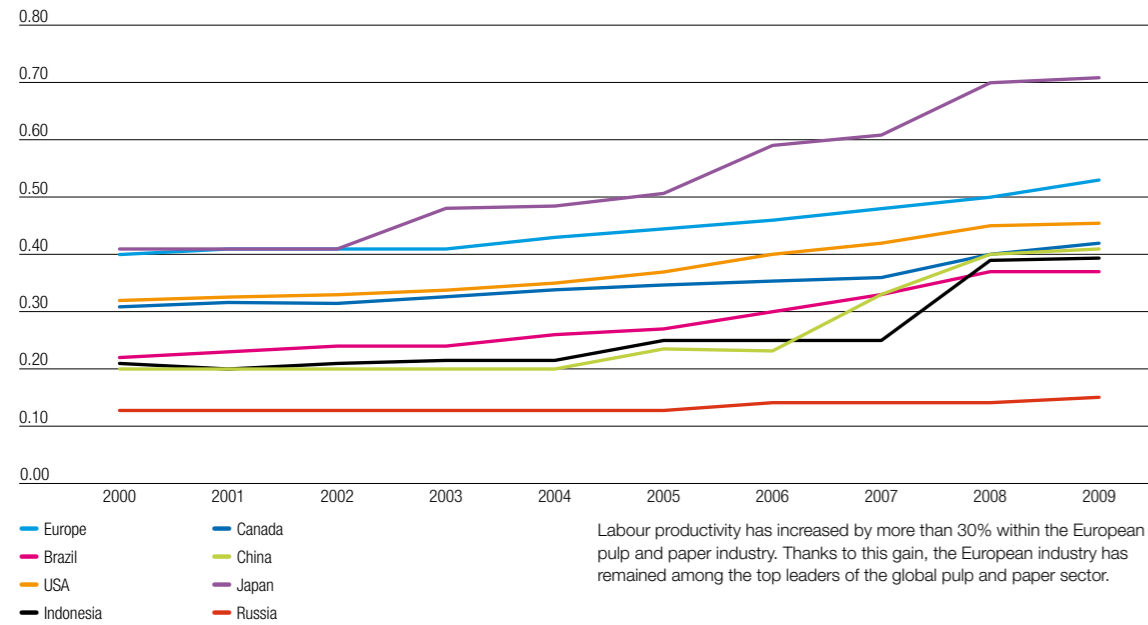


Source: CEPI and Pöyry

Labour Productivity: Comparison Between Europe and Competing Countries

Source: RISI

Finished metric tonnes / man hour



Labour productivity has increased by more than 30% within the European pulp and paper industry. Thanks to this gain, the European industry has remained among the top leaders of the global pulp and paper sector.

Cash Manufacturing Cost Structure of the European Pulp & Paper Industries in 2009

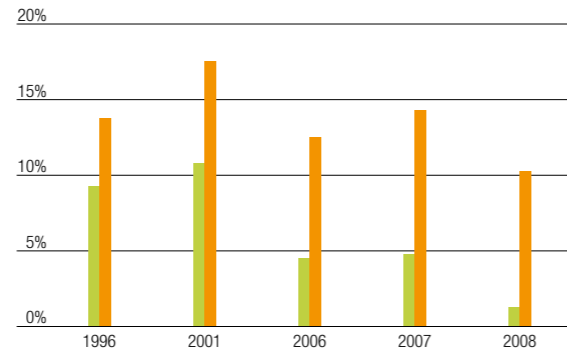
Source: RISI



Cash manufacturing costs include consumables needed to produce ready to deliver non-converted products. Capital costs and transport costs are not included.

European Pulp & Paper Industry Profitability

Source: Poyry



ROCE: Return on Capital Employed
EBITDA: Earnings Before Interest, Taxes, Depreciation and Amortisation (= operating margins)

The industry has clearly suffered from a downturn during the past few years. The increase in profits achieved at the beginning of the decade has disappeared; the recession combined with the increasing competition has bitten hard.

European pulp & paper industry: EU15 + Norway + Switzerland, with around 70% of the capacities represented.



Environment

Management approach

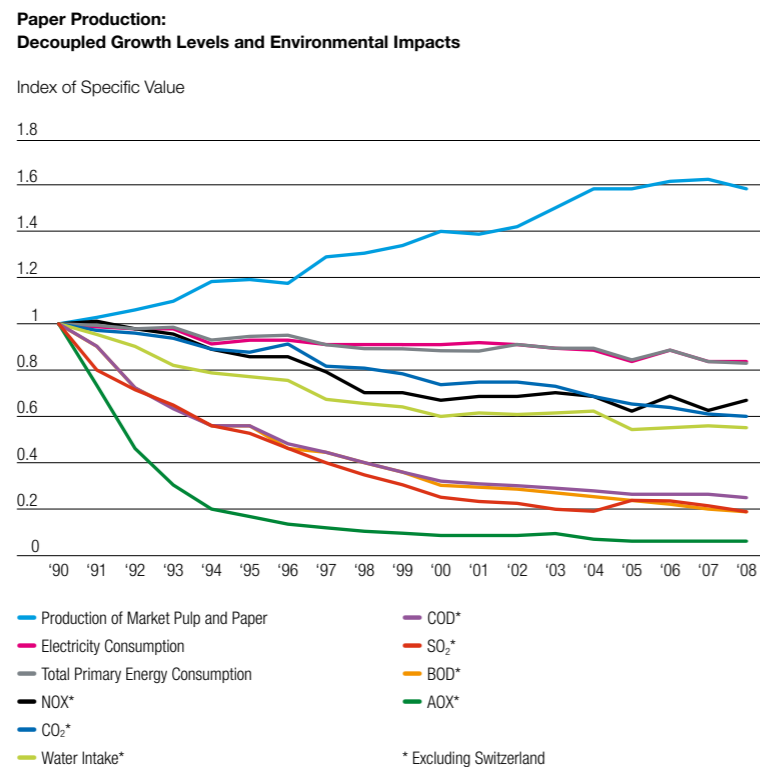
The Environment is central to all CEPI activities and a large proportion of its resources are focused both horizontally and vertically on ensuring the industry minimises its impacts across the EU. Within the CEPI staff all Directors have responsibility for developing and managing environmental activities and policies. The Energy and Environment Director works with his colleagues and their expert committees, which are made up of technicians from national paper associations and paper companies, to develop and implement clear and well-defined activities on behalf of the industry. All activities proposed are scrutinised and eventually adopted by the CEPI Board.

An important role is to monitor environmental key performance indicators (KPIs), which CEPI reports on every two years.

Environmental Management

By better management and control systems of environmental impacts in the production of pulp and paper, overall environmental performance improves. Mills operating an Environmental Management System rose to 83% of the total in 2006; our ambition is to reach 100%. In 2003, CEPI committed to strive towards a situation where all pulp and paper in Europe is produced in mills with an Environmental Management System (ISO14001 or EMAS). Unfortunately, we were not able to obtain the 2007 figures before the publication of this report and we will publish this figure at a later time separately.

This decoupling graph shows the relationship between paper production and emissions. While paper and pulp production has increased over the years, emissions have been declining. This is called 'decoupling', which is a prime aim of our environmental goals and of the EU environment policy. The economic crisis in this respect does not support such goals. With the mills producing at a lower capacity rate, efficiency goes down.



Water Emissions	1990	2000	2005	2006	2007	2008
BOD (kg/t of product)	5.29	1.68	1.03	0.99	0.93	0.86
COD (kg/t of product)	26.57	9.08	6.65	6.69	6.57	6.29
AOX (kg/t of product)	0.577	0.048	0.031	0.032	0.030	0.029
Air Emissions						
Specific SO₂ emissions (kg SO ₂ /t of product)	1.69	0.42	0.33	0.35	0.33	0.29
Specific NO_x emissions (kg NO _x /t of product)	1.31	0.89	0.82	0.86	0.82	0.84

Chemicals - REACH

In the past two years the REACH (Registration, Evaluation, Authorisation and Restriction of Chemicals) regulation has come into force and covers all chemicals used and produced in the EU. The paper industry under REACH is a 'downstream' user, buying the substances it needs from chemical suppliers. The main REACH obligations lie with these suppliers, but industry and suppliers work together on assessing the impacts of using the chemicals in our mills.

regulation and was made available, free of charge, to the whole paper recovery chain and other stakeholders.

Virgin fibres were already exempted from REACH, being a natural raw material. Final work has been done on establishing the consortia needed for the by-products we make in pulp mills, such as wood based turpentine and other bio-based materials.

To assist our members, a REACH guidance document was established and is widely used. Further, together with the Commission, the status of recovered paper under REACH was cleared. CEPI produced and published, in support of safe recycling of paper, information on recovered paper for REACH purposes. This action went beyond legal requirements laid down in the REACH

Energy costs have a large impact on the performance of pulp and paper producing companies, resulting in a natural drive to reduce energy consumption. Improving our efficiency, installing CHP (combined heat and power) and changing the fuels we use are key measures the industry has taken in past years.

The Climate Challenge

- the European pulp and paper industry is the largest single consumer and producer of renewable energy in Europe
- the paper sector is part of the EU Emissions Trading System
- the paper industry has a constant focus on improving energy efficiency, using combined heat and power and innovative solutions using residues and waste.
- paper was the first sector with a well-received and internationally shared framework for carbon footprint calculation, to show the relationship between our products and their carbon emissions
- the paper sector is also the only major industry sector that was able to reduce emissions under ETS in 2008 vs 2007 (European Commission CO₂ database)
- paper and board, when coming from sustainably managed resources, are climate friendly materials, as the Intergovernmental Panel on Climate Change (IPCC) states in its 4th Assessment report:

“...a sustainable forest management strategy aimed at maintaining or increasing forest carbon stocks, while producing an annual sustained yield of timber, fibre or energy from the forest, will generate the largest sustained mitigation benefit”

The carbon footprint framework is now implemented

In September 2007, CEPI developed a sector wide carbon footprint framework, which has been used widely in industry, forming the basis on which companies report their carbon footprints to customers. Three industry sectors have added specific modules (carton board, corrugated and fine paper). Based on the framework, we have engaged with the development of international standards and are taking part in many value chain projects in this area.

EU Emission Trading System

Around 900 of the EU pulp and paper mills are part of the EU ETS. Our total CO₂ emissions covered by the system are around 37 million tonnes in 2008. After the first testing phase of EU ETS in 2005-2007, we are now in the second phase (2008-2012). In the third phase (2012-2020), targets will become even more stringent as carbon emissions from industry will have to be cut by 21% compared to 2005, to achieve the overall goals.

Trees as they grow absorb CO₂ that becomes stored in paper-based products

We are continuing to learn and understand more about the climate impact of our actions. The relationship between carbon emissions, the climate and the industry is not only about fossil fuels and biomass. Wood based products store carbon and the reservoir of wood and paper products in the world enables significant carbon storage. Sustainable forest management is part of the important relationship between forests and climate.

The paper sector reduced its absolute CO₂ emissions by 8% compared to 1990

The specific emissions per tonne of paper were reduced by 42% compared to 1990 were more than half of the energy we use (55.5% in 2008) comes from biomass and of the remaining part almost 40% (36.8% in 2007) from natural gas. Although we are energy intensive we are less and less carbon intensive.

Direct CO ₂ Emissions*	1990	2000	2005	2006	2007	2008
Absolute (Mega tonnes)	39.89	41.94	41.29	41.15	39.83	37.26
Specific (kt CO ₂ / kt of product)	0.57	0.43	0.38	0.36	0.35	0.34
Indirect CO ₂ Emissions*						
Absolute (Mega tonnes)	14.50	14.93	12.23	14.81	13.76	12.81
Specific (kt CO ₂ / kt of product)	0.20	0.15	0.11	0.13	0.12	0.11

*excluding Switzerland
Direct CO₂ emissions are the fossil emissions produced by the pulp and paper mills and connected energy plants.

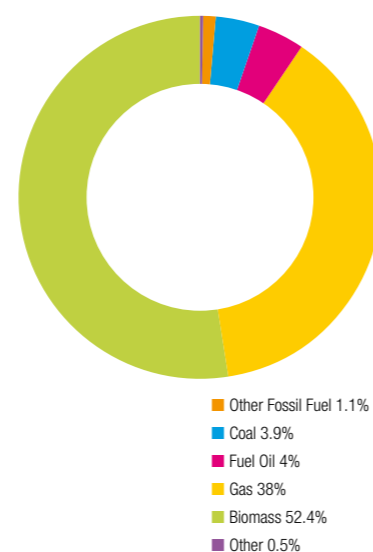
Although we are on the right track, the future will be very challenging. The European Union has set a global target of minus 30% CO₂ compared to a 1990 baseline by 2020 and a global target of minus 50% by 2050, resulting in an 80-95% cut in CO₂ emissions for all developed countries in the world. This shows we are only at the beginning of a new industrial revolution.

To reach these goals, according to the International Energy Agency, we must:

- use best available technology
- install CO₂ capture and storage, also for biomass plants
- fuel switch
- increase recycling
- develop new technology
- introduce bio-refinery concepts

This will require large investments and more research and development in the years to come. For this reason the industry needs to remain competitive.

CEPI Countries: Primary Energy Consumption 2008



Energy Consumption and CHP	1990	2000	2006	2007	2008
Total Specific Primary Energy Consumption (TJ/kt)	16.07	14.01	13.81	13.63	13.41
of which:					
Specific Fuels Consumption	13.08	11.48	11.60	11.54	11.36
Specific Net Bought Electricity	2.99	2.53	2.22	2.09	2.04
Specific Electricity Consumption (MWh/t)	1.24	1.12	1.07	1.05	1.04
% of electricity produced through CHP compared to total on-site electricity generation	88.12	90.09	95.96	95.79	94.32

This table shows the primary fuel used by the industry, the electricity sourced from the grid and therefore the total energy use by the paper sector. It also shows the direct carbon emissions from the paper industry and the indirect emissions resulting from the use of purchased electricity.

The European Pulp and Paper Industry is the biggest single use and producer of bio-energy in Europe

More than half of the European pulp and paper industry's total primary energy consumption is based on biomass, which corresponds to a quarter of the total solid biomass based energy used in Europe. In 2003, the industry committed to increase the share of biomass to 56% on average in its on-site total primary energy consumption by 2010. In 2008, this share grew to 54.4% from 53.7% in 2007. The European Paper industry has been on track

Bio-refineries extract value from forest resources

Integrated bio-refinery technology in the pulp sector is expected to extract full economic value from fibre, create employment and reduce emissions. It could offer lower energy costs for existing processes and alternative 'bio-revenue' streams such as bio-fuels and green chemicals. A company in the European pulp and paper industry is already producing vanillin through bio-refinery, a substance used in food, beverage and pharmaceutical production.

Declaration of Intent on Renewable Energy Sources*	2001	2002	2003	2004	2005	2006	2007	2008
Biomass Use (%) *	49.3	52.5	51.9	52.4	52.3	52.9	53.7	54.4

*including Austria, Belgium, Finland, France, Germany, Italy, Netherlands, Norway, Portugal, Spain and Sweden

to reach its ambitious target. Nevertheless, it is difficult to predict whether the economic and financial crisis will have a positive or negative influence on the commitment of the industry.

CEPI agrees the renewables sector should be encouraged. However, financial support mechanisms for bio-fuels' feedstock wood result in wood-price hikes and local shortages. This could create fierce competition for land and resources and threatens our market competitiveness worldwide. We have worked with the European Commission to find solutions and the now mandatory detailed national renewable action plans are a step in the right direction. They require the monitoring of changes in the competitiveness of wood using industries, such as paper manufacturing.

CEPI with the woodworking industry (CEI-Bois) and the forest owners (CEPF) have set up the Forest Technology Platform (FTP) with bio-refinery at the top of the agenda. During 2009, FTP initiated a plan to be part of an ambitious public-private partnership to receive substantial funding for research and demonstration projects in bio-refinery. Under the STAR Colibri programme, FTP works with other European technology platforms such as Plants for the Future, SusChem, Biofuels Technology Platform and ManuFuture-EU, to accelerate the demonstration of bio-refinery plants.

Best Practice

European Speciality Papers reduces carbon footprint by 14% in just 2 years



The European Speciality Paper industry has been able to reduce its environmental emissions significantly in just two years, according to the Life Cycle Impact Assessment (LCIA) commissioned by PaperImpact. The industry average for the carbon footprint was reduced by 14 % and a significant reduction was measured in all impact categories.

The updated carbon footprint for the specialty paper sector is 1050 kg CO₂e/tonne of paper. About 75% of the improvement was accomplished in areas where the plants have the most control, i.e. taking into account fuel-related emissions from their own energy production and emissions associated with purchased electricity and heat. The carbon footprint reduction is largely due to mills changing over to lower emitting, cleaner fuels.

paperimpact
Unfolding the potential of paper

PaperImpact, the European Speciality Paper Manufacturers' Association, has commissioned a Cradle-to-Gate Life Cycle Impact Assessment of its members' speciality paper production comparing the data sets of years 2005 and 2007 for a large number of mills. The study was conducted by an environmental consultant, Mrs. Angeline de Beaufort from the Netherlands and the results were peer reviewed by NCASI (National Council for Air and Stream Improvement), an institute with expertise in this field based in North Carolina, US. More information at www.paperimpact.org

Transport

Assessing the impact of transport

Transport in the supply chain is often outside the pulp and paper producer's direct control. This will make it especially challenging to manage emissions. In that spirit, CEPI is finalising the "Transport Carbon Footprint Assessment Guidelines". The aim of these guidelines is to help the European pulp and paper companies assess their carbon footprint related to transport in a harmonised way. This work, carried out by the CEPI transportation network, should be considered as a contribution and a complement to the 'CEPI Framework for the development of Carbon Footprints for Paper and Board Products', released in September 2007.

Eco-efficient road, rail and waterways

The logistics of pulp and paper industry start in the forest for wood transport and in the cities when collecting used paper. Infrastructure in rural areas and mobility in urban areas is therefore essential.

Trade Flows of Paper to and from CEPI Countries in 2008

Total Imports to CEPI: 5,4 Million Tonnes
 Total Exports from CEPI: 17,0 Million Tonnes



Loads moved in 2008 (approx. figs) Source: CEPI

Pulpwood: 152 million cubic metres	used by the European pulp and paper industry
Non-fibrous materials: 16.7 MT	
Recovered paper: 48.6 MT	
Finished paper and board: 99 MT, with 17 MT exported	

Choice of transport modes allows a logistics manager to plan the best, most cost-efficient and reliable service - and the most sustainable one.

Like for many industrial sectors, road is the main mode of transport. However, the alternative modes cannot compete on quality of service, cost efficiency and flexibility. Higher efficiencies in road transport are constrained by a Europe-wide scarcity of skilled heavy goods vehicle drivers, urban areas prone to gridlocks, lack of transport infrastructure, and different national rules and parameters making road transport more

and more expensive. For years, Sweden and Finland have had a very positive experience of using longer, heavier vehicles to boost transport efficiency and lessen environmental harm without compromising road safety. However, these highly flexible combinations of loading units – the European Modular System (EMS) - are rarely allowed elsewhere on the European road network. Modern electrified lines powered by green energy sources make rail attractive to the paper sector. But without a flexible and well integrated European network and available capacities with reliable and competitive services, we cannot cater for customers' needs. A standardised signalling system across Europe would resolve a major problem.

Assessing the carbon emission impact of transport is made especially challenging due to multiple factors such as methodologies and system boundaries. That said, we are monitoring the situation and gathering best practice case studies.

Best Practice

Swedish forest industry commits to cut CO₂ emissions



The Swedish forest industry has committed to cutting emissions of fossil CO₂ by 20% by 2020 and common sustainability criteria for purchasing transportation services is due to be completed by 2010.

Sweden's common methodology and emission calculation model for paper, pulp and bio fuels in essence provides for CO₂ calculations per tonne up to the EU-zone geographical border and to the first customer or wholesaler. Transport eco-efficiency is based on efficient logistics, lower cost and less environmental impact. In principle priority goes to sea and rail transport.

Order your copy here:
<http://www.forestindustries.se/>



Environmental technology to clean and reduce the volume of water used in our industry is highly developed and we want to share our expertise and help shape water policy for the future.

Marco Mensink
Energy and Environment Director

Water Security

- industry is looking at its water consumption for efficiency improvements issues as well as improving from water treatment
- with the aim of being the leader in this issue, CEPI has become an active partner in the development of water stewardship and water footprinting
- assessing water-related impacts on our sector must acknowledge wide geographic variations that exist in water availability, and individual site issues
- we are developing a water reporting guideline for the sector and projects on water footprinting are starting
- our water reporting is at an early stage and we expect much improvement and more detail available by 2011

“Water and its availability and quality will be the main pressures on and issues for societies and the environment under climate change.”

Intergovernmental Panel on Climate Change, 2007

Water impact assessment

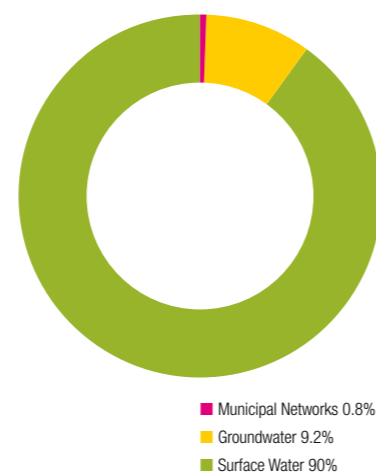
Every mill has a unique water profile due to its location and the origins of its water, the destination of its effluent and the origin of its fibrous and non-fibrous raw materials being used.

Summarising data from companies on water intake, sources, usage, treatment, effluent and discharge results in figures on total European paper industry consumption, the absolute water consumption of the European pulp and paper industry in 2008 stood at 220 million m³. We continue to work to limit the impact of our water consumption. In so doing, we will increase efficiency and produce fewer carbon dioxide emissions at our mills, as less energy is needed for this as well.

Water networks

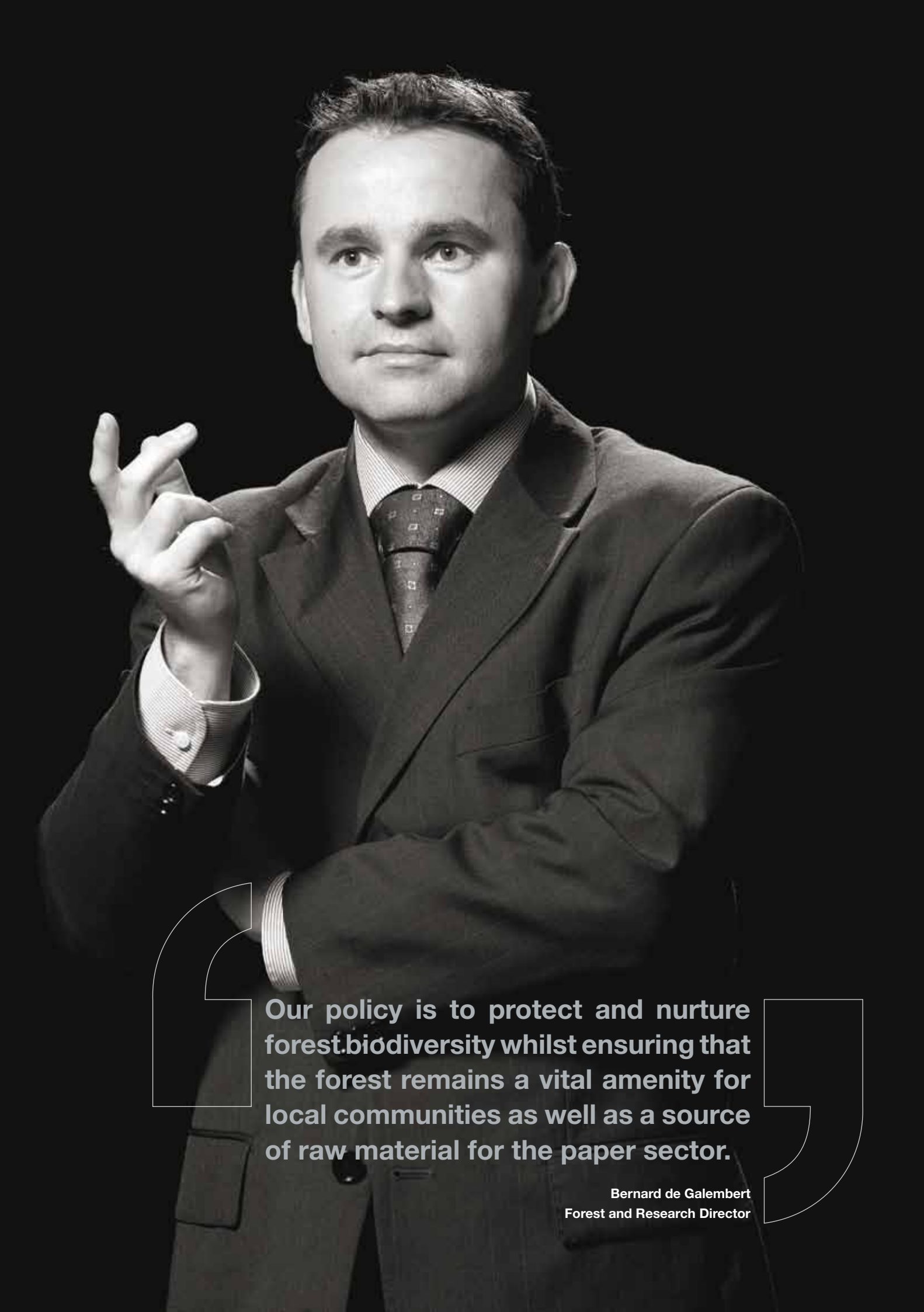
Policies on water, climate and raw materials are converging. We are well-positioned to play a valuable active role in initiatives that will lead to a better understanding of water impacts. In 2009 CEPI became the first industry federation member of the European Water Partnership, a forum to discuss innovative management, technology and financial solutions, and underline the urgency of water challenges for business and communities.

Sources of Water in CEPI Countries in 2008



**Best Practice
Recycling Water**

A mill in Madrid will replace all fresh water by recycled municipal effluent with effect from 2010. An agreement was signed in June 2008 with the water supplier and the local authorities in Madrid whereby the mill would use in its production municipal effluent that had been treated in several stages. The mill will be the first in Europe to manufacture paper from 100% recovered paper using 100% recycled water. Studies and pilot trials to evaluate the scope for reusing the mill's own treated effluent after further treatment are underway.



Our policy is to protect and nurture forest biodiversity whilst ensuring that the forest remains a vital amenity for local communities as well as a source of raw material for the paper sector.

Bernard de Galembert
Forest and Research Director

Forestry

- extensive study of forest sustainability issues has shown paths to improve forest productivity, the forest environment and forest's social value
- the 2009 industry biodiversity handbook shows companies how to enhance forest biodiversity, using selected best-practice case studies
- certification is very important to sustainable forest management

In 2007, CEPI set itself the target to focus on identifying, supporting and promoting the preservation of biological diversity and to work in partnerships with science-based environmental organisations.

Best Practice
Biodiversity is our business



A new handbook "Sharing Experiences - Promoting Biodiversity in the European Pulp and Paper Industry" explores the possible role of industry to contribute to biodiversity by adhering to responsible buying behaviour. CEPI together with Eurosite Nature, published this 60-page manual in 2009 which comprehensively covers relationships between industrial activities, forest wellbeing and the lifecycle of forest species. Sharing Experiences outlines the European policy framework and features a large informative section on procurement best practice. It signals the start of a process that will keep biodiversity at the heart of business decision-making.

Joint action against illegal logging

Illegal logging worldwide has the capacity to distort market conditions and damage the reputation of the entire industry. It can undermine product value in financial terms, harm the industry's image and hinder forest biodiversity.

Well-designed European legislation, proportionate and efficient, and which recognises the important role of voluntary self-regulation, can support trade in legal wood. Chain-of-custody and identification systems already are widely applied throughout Europe.

2005 saw the introduction of the voluntary CEPI Code of Conduct endorsed by our 18 national associations. Progressively the code has also been implemented by individual companies and mills. An increasingly large proportion of the pulp and paper production companies are now reporting full compliance with the principles. Many were already addressing the issue in their Environmental Management System, through development of third-party verified tracking systems or through increased certification of the chain of custody according to independent forest certification systems.

In 2008:

- all CEPI member companies that buy wood had adopted a procurement policy with a legality requirement, and most made suppliers aware of it
- about 2/3 of companies include legality requirements in purchasing contracts. A single proven case of illegal logging led to corrective measures
- more than 90% of companies' wood procurement organisations are EMS certified; where not, special auditing and risk assessment measures are in place
- 95% of companies use tracing systems, of which more than 2/3 is third party verified
- wood procurement documents are being maintained by virtually all the companies, and around 50% publicise facts about wood procurement in their literature
- legality is part of the education and training programmes in 73% of the wood-buying companies

The data reflects the sector's commitment to combat illegal logging. But several hurdles to the introduction of the CEPI Code of Conduct in every company have been identified. Existing forest certification systems are perceived as going already beyond the Code of Conduct. Some companies do not purchase from high-risk areas or controversial origins and use wood exclusively from plantation forests.

The German example

The CEPI Code of Conduct for the German pulp and paper industry was implemented by VDP, its representative body. Now VDP wants to bring this voluntary commitment, and the monitoring of it, into the framework of the FLEGT initiative. As The VDP already discussed with the German Environment Ministry (BMELV) and certification body SGS a plan for a formal, third party verified monitoring report. VDP's monitoring report for 2009 will use 2008 data showing progress made since the first report in 2006.

Forest certification

Data for certified forestry and wood supplies is collected direct from companies wherever possible and crosschecked against information from other reliable sources to give aggregate figures for all of Europe. Our data covers 95% of the European pulp and paper production capacity within CEPI region.

CEPI itself is a member of the two main certification bodies FSC (Forest Stewardship Council) and PEFC (Programme for the Endorsement of Forest Certification schemes). The figures below give the percentages of wood, pulp and paper products from certified sources, which are FSC or PEFC certified or might even have both certifications.

82% of company-owned/leased forests in Europe are certified by independent forest certification schemes (without any distinction of scheme); the decreasing proportion compared to last year is mostly due to forest sales by companies.

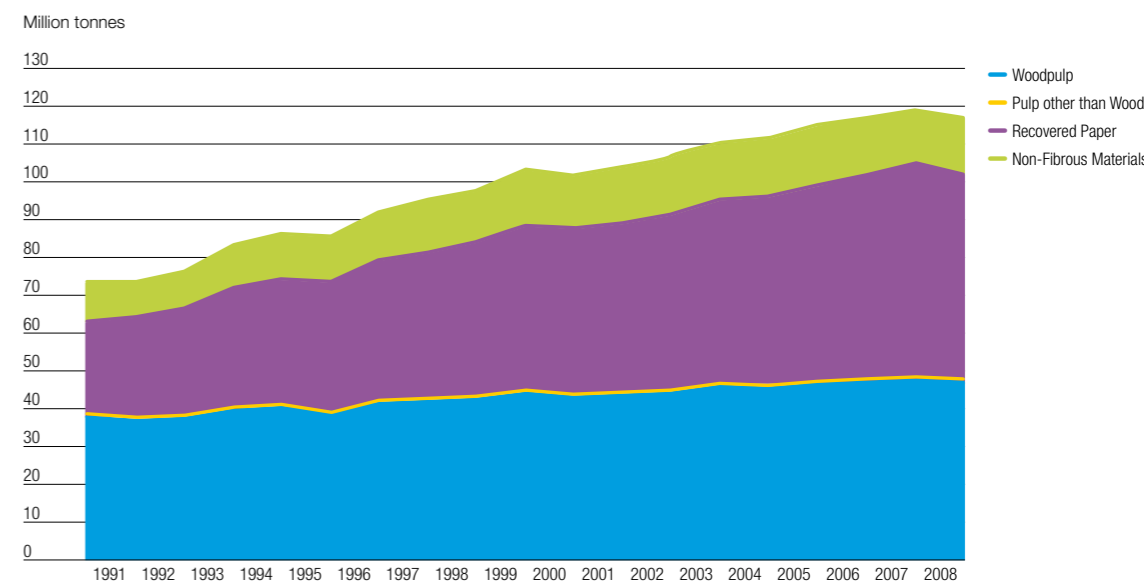
56% of round wood, chips and sawdust delivered to mills in Europe are from forest management certified sources (without any distinction of scheme);

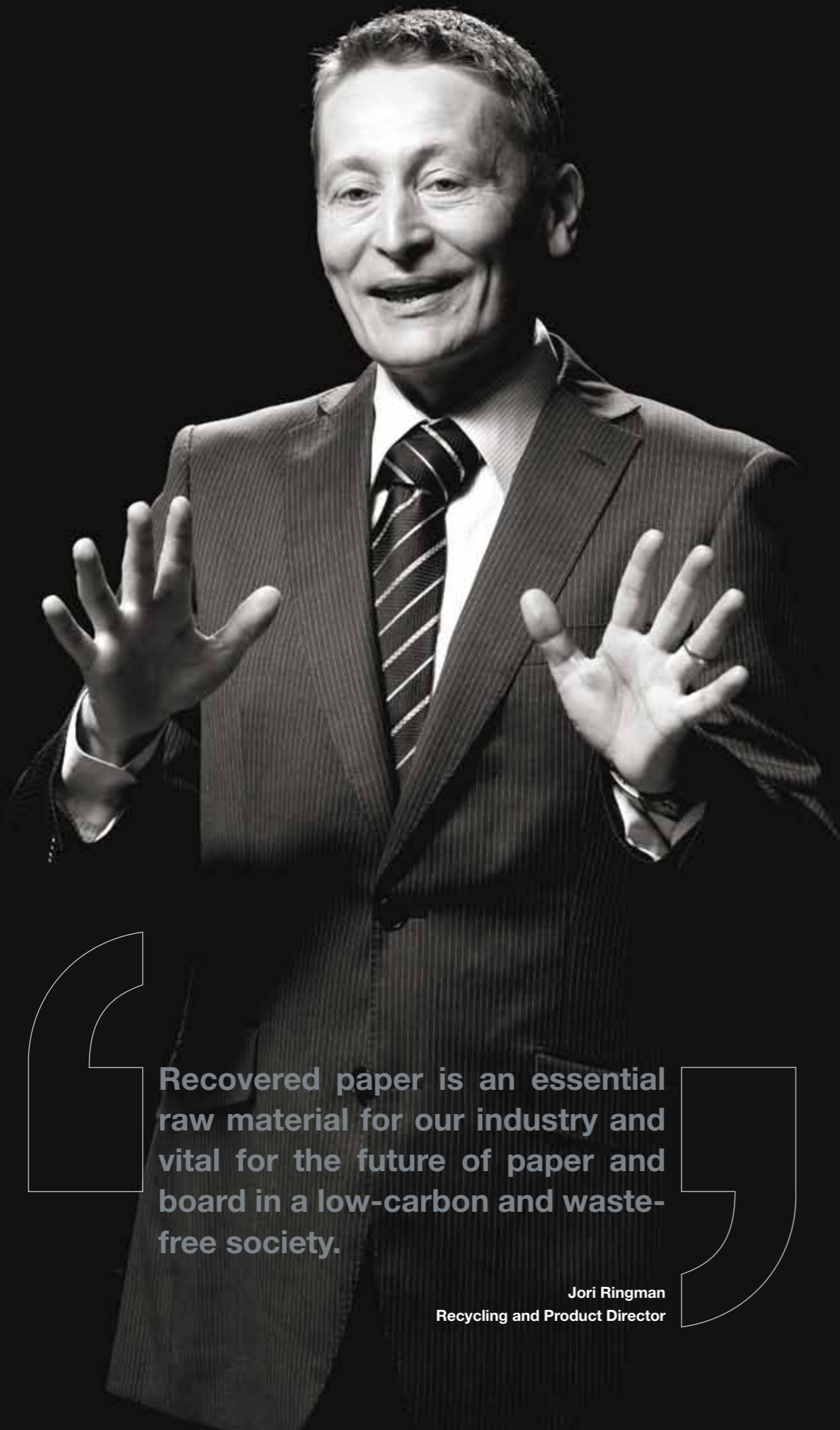
69% of external purchased pulp delivered to mills in Europe comes from forest management certified sources (without any distinction of scheme);

90% of market pulp production capacity by mills in Europe own Chain-of-Custody (CoC) certification, and 53% of market pulp sales (not internal deliveries) are sold with CoC-certificate enabling further labelling;

76% of paper, tissue and board production capacity by mills in Europe own Chain-of-Custody certification, but only 13% of paper, tissue and board are sold with CoC-certificate enabling further labelling.

Raw Material Consumption in Papermaking in Europe





Recovered paper is an essential raw material for our industry and vital for the future of paper and board in a low-carbon and waste-free society.

Jori Ringman
Recycling and Product Director

Championing a Recycling Society

- paper has become the first material able to trace back a secondary raw material to its source
- the 2008 EU Waste Legislation gives important support to the resource efficiency aims of the paper recycling sector
- eco-design and technology development ensure high quality final product made from recovered fibre
- over 83% of the paper collected in Europe is recycled in Europe; less than 17% was exported to other countries for recycling in 2008 (Source: ERPC)
- European paper recycling awards were introduced in 2007 to celebrate and share best practices

The recycling rate in 2008 at 66.6%² far exceeded our 2010 target (66%). This partly reflects the good work done to improve collection systems. However, the financial crisis hit all areas of the economy with unexpected impacts. The recycling rate jumped up in the second half of 2008, for example. As the recycling rate represents the ratio between the recycling and consumption of paper, the sudden fall in consumption resulted in a record high recycling rate, as recycling continued its steady growth. Respectively, when the economy revives recycling may not be able to immediately align with increasing paper usage and the recycling rate may drop temporarily. Recycling is intrinsically a self-adjusting mechanism which will adapt to any volume of consumption with a time lag of three to six months. The industry is committed to its ambitious target of recycling paper at a steadily increasing rate in Europe.

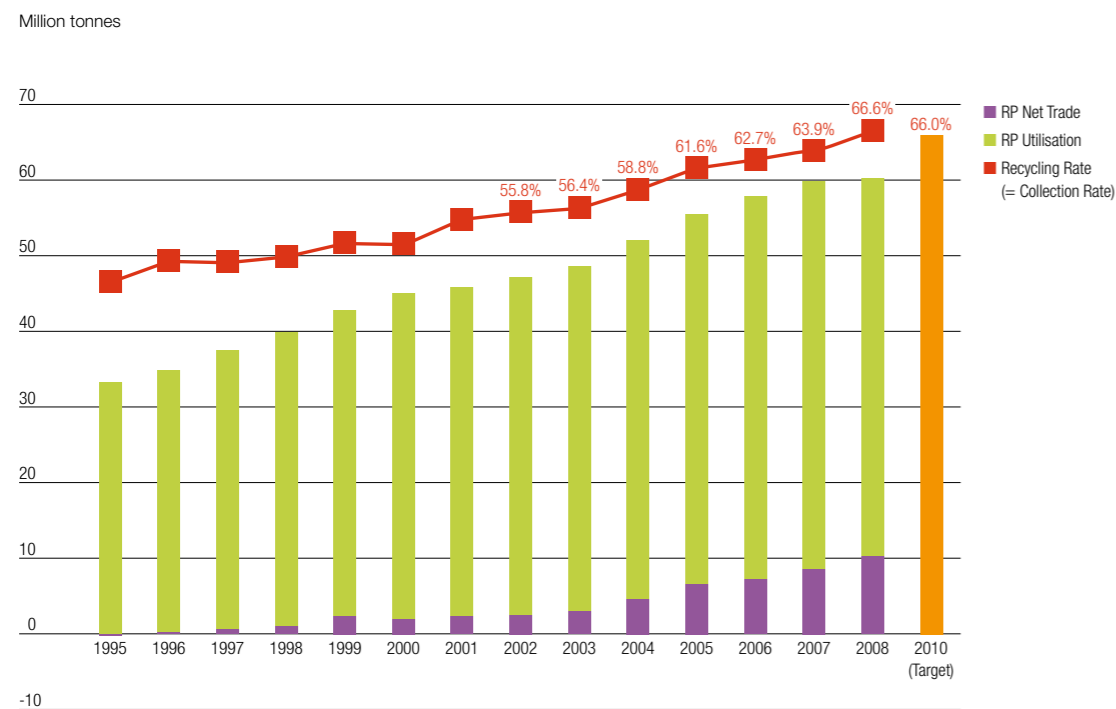
Diverting more paper from landfill to separate collection for recycling is making an important contribution to achieving the target 65% of biodegradable materials that should be recovered by 2016 under the Landfill Directive. Paper will also play an essential role in reaching an EU target to recycle 50% of household waste by 2020. National support for collecting paper separated from other recyclates will be crucial in achieving this.

Eco-design is transforming the quality of recovered paper

We are aiming to make the heterogeneous stream of recovered paper more reliable and easier to recycle. Working with relevant parts of the paper value chain we are introducing eco-design principles to inks and adhesives known to cause problems. The 14 industry sectors in the European Recovered Paper Council (ERPC) are driving and monitoring progress in the value chain.

CEPI, together with the relevant stakeholders and sectors, will keep updated a comprehensive set of guidelines on responsible sourcing of recovered paper and actively promote their implementation.

European Paper Recycling (Rate Progress)



² ERPC monitoring report 2008

Action against economic losses and ecological harm.

- we promote resource efficiency by ensuring recovered paper bales are of an acceptable quality to be transported and recycled
- we can check the integrity of recovered paper bales by an identification system which shows supplier and enables traceability up- and down-stream
- we encourage efforts by publishers and converters to 'green' the paper chain by introducing eco-design to prevent waste and make products easier to recycle
- we avoid costly line disruption, machinery damage and flawed materials by exclusion of detrimental materials in recovered paper

We welcomed new resource-focused Waste Legislation in December 2008.

Directive 2008/98/EC is an important framework for the paper industry and we are guiding our members on best-practice measures to implement it – for example by introducing separate paper collection ahead of 2015 as required in the Waste Directive.

Best Practice

European Recovered Paper Identification System



In autumn 2008, the European bodies representing the recovered paper supply chain, CEPI, ERPA and FEAD, launched a European Recovered Paper Identification System (ERPIS) allowing recovered paper suppliers to register for a unique supplier code for marking recovered paper bales. This is a voluntary scheme, which can be applied in bilateral agreements between buyers and sellers of recovered paper throughout Europe.

In practice, the system allows every member in the recovered paper chain to keep track of its supplier to ensure business confidentiality. Public authorities may be granted access to the supplier codes to be able to trace the origin of recovered paper bales when necessary.

Several paper mills have followed our recommendation to use the identification. In cases where systems for supplier identification already existed, paper mills have started to adapt their contracts with their suppliers to comply with the requirements of the harmonised European system.

A first assessment shows that to date more than 536 recovered paper suppliers in Europe have registered to the system. These represent a significant fraction of the volumes of recovered paper sent to paper mills. Recovered paper supplying companies owning several depots have opted to register their depots. For more information please visit www.recoveredpaper-id.org

Product Focus

- 1991-2007 paper production rose in CEPI countries by 60%; by contrast, virgin material content rose by 18% and indicates the increasing fraction of recycled fibre in the mix
- in 1991, a tonne of wood produced 2 tonnes of paper; in 2007, a tonne of wood produced 3 tonnes of paper
- sustainable development of paper has successfully decoupled economic growth and environmental impact

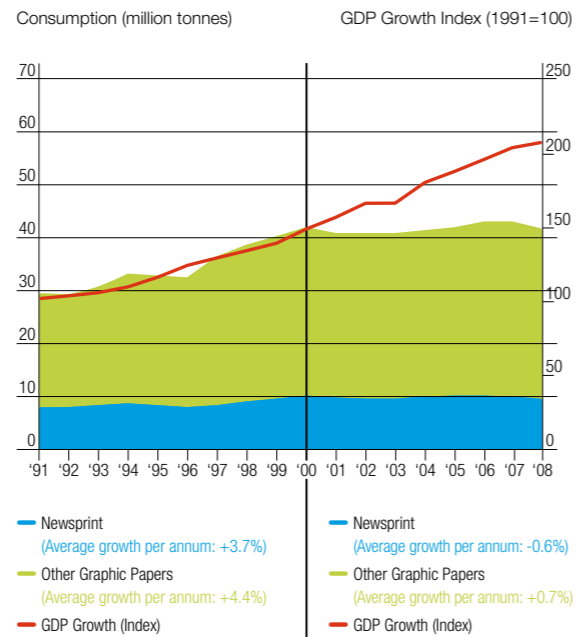
CEPI Statistics show clear decoupling between economic growth and volume of printing and graphic papers. While this can be attributed to several factors, industry's efforts to design lighter paper, producing "more with less", has contributed to the development essentially. Similar development has been reported in packaging papers, where lighter packaging is part of the legally binding essential requirements.

The innovation strategy of the paper sector is based on the principles of industrial ecology. This means, inter alia:

- product design is engineered for easy recycling after recovery
- production residues must be managed towards guaranteed outlets into other products
- zero residues is the goal

CEPI participates in the EU Lead Market Initiative (LMI), in particular in the area of bio-based products. Innovative, low-carbon paper products and other bio-materials from pulp and paper industry will be contributing to building a European bio-economy.

GDP and Printing and Graphic Paper Production Decoupling
Source: CEPI



	1990	2000	2005	2006	2007	2008
Specific amount of residues landfilled (kg/t of product)	76.70	32.34	20.31	18.80	17.41	17.77

Research on waste streams from paper production has revealed that it contains useful elements for producing high-value products and paper or energy conversion. Some paper producers are already turning rejects into energy at their sites. However, even current best practices are still far from gaining maximum value from paper sources. CEPI is looking at possible recovery options and will be examining these in terms of sustainability in the light of existing legislative restrictions. In the next Sustainability Report, CEPI will be able to publish figures in greater detail on residues of the paper making process.

Production residues can be measured per tonne of finished paper and reducing this level will translate not only towards increased resource efficiency but also into fewer carbon emissions we produce. Between 2006-2008, industry residues to landfill fell from 18.60kg/tonne to 17.77kg/tonne.

Product Safety

Food Contact

Important guidelines for paper and board packaging for food contact designed to guarantee the food safety of final products are intended to be finalised in 2009.

This voluntary measure is groundbreaking in several ways, first because the entire supply chain worked together on the four-year project. The supply chain and wider society will reap benefits because this process:

- detects risk with greater accuracy and cost effectively
- avoids wasting resources on non-existent risks
- engages the value chain in collaborative eco-design
- ensures paper and board packaging is integral to sustainable society

The peer review identified areas where further improvement was thought be possible to bring the guidelines even more closely into line with the EU Framework Regulation. This work was undertaken accordingly in preparation for adopting the Guidelines. Even with those identified areas of improvement, the summary was stating the superiority of the Industry Guidelines compared to guidelines and legislation that existed before:

“The Industry Guideline has more strengths and fewer weaknesses than any previous documents.”

(Peer review, 2009)

Eco-design

Eco-design makes products fit into existing eco-friendly systems and processes, which is desirable from safety, technical and economical points of view. The whole industry acted fast to replace phthalate-based adhesives with acceptable alternatives without disrupting the value chain. And mechanical advances allow lighter weight paper to be just as strong using less material, to meet consumer demands and packaging reduction targets.

“Sustainability is something you have to drive and it is important to disseminate good ideas. There is a correlation between eco-design and the economy.”

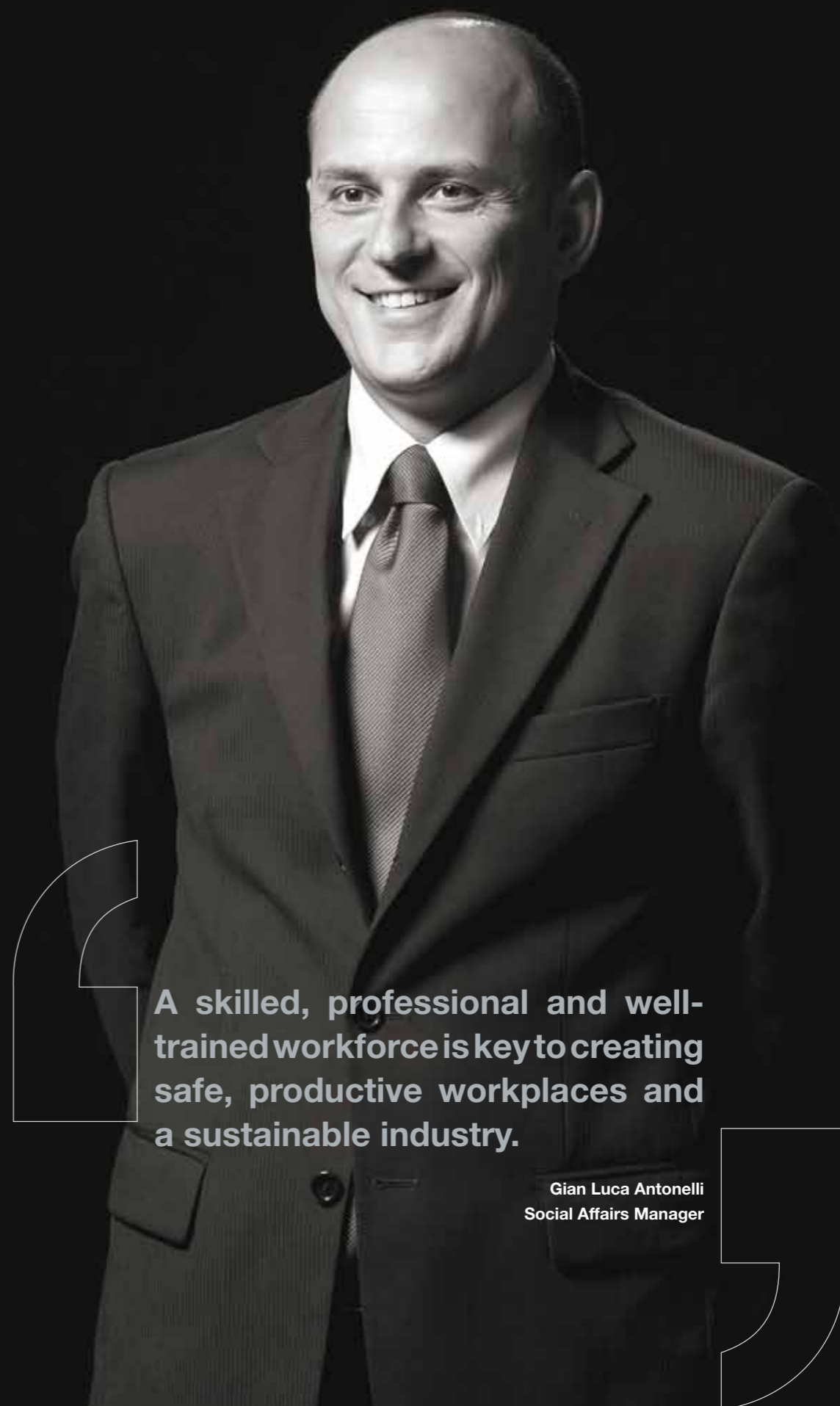
(CEPI)

The guidelines were peer reviewed to assess the level of conformance with existing national legislation

“In our opinion, the current draft of Industry Guidelines has built successfully on a number of themes drawn out from pre-existing member state legislation and the Council of Europe resolution, with its key strengths being the clear rules it offers for the use of recycled fibres and multilayer materials. It also benefits from containing provisions relating to Good Manufacturing Practice and a Declaration of Compliance.”

(Peer review, 2009)





A skilled, professional and well-trained workforce is key to creating safe, productive workplaces and a sustainable industry.

Gian Luca Antonelli
Social Affairs Manager

Speed of structural change and technology transition to low-carbon will create a demand for educated and well-trained employees at all levels, for which industry is making provision through investment. Meanwhile, employers are working through the current crisis doing their best to minimise social upheaval.

Social Affairs

- during the deep global recession more than 4% of jobs have been lost
- a shift towards green technology will create new types of jobs in the sector
- a rich variety of national study programmes, seminars, courses and lifelong learning is being offered in most countries
- large investment in time and money goes into developing the present and future workforce
- worker safety is improving but to reach zero accidents will require awareness

Management approach

In social affairs, including Labour practices, Human rights, Product responsibility, health and safety, as well as training and education, we work to improve worker safety and wellbeing and maintain good relations with trade unions. CEPI acts where it can make a difference, in addition to the work carried out by national associations and companies of our industry. We have a Social Affairs Manager at CEPI, who is supervised by the Managing Director. They work closely together with the statistics department in order to improve the data available on the European level.

Employee profile

In 2008, the paper industry employed some 243 300 people and 4.4% fewer than 2007. The trend continued in the first nine months of 2009 with more mill closures, resulting in further job losses.

Our future workforce

We asked our national members for information and views on education and training in their countries and were told:

“...in five years’ time there will be a great need for educated employees at operator level and engineering level”

New graduates enter the industry every year across the CEPI region. Companies support in-service study and training including e-learning. In 2008, specialist education was offered in the CEPI region at 65 institutes, 44 vocational schools and 16 universities. Europe’s major centres of pulp and paper production nurture young people’s interest in the sector. The French paper industry association (COPACEL) visits some 200 schools every year, to increase the understanding and convey the attractiveness of the industry to young people.

People are the lifeblood of the paper industry

The present generation of paper industry professionals is working to bring on the next generation of engineers and managers and training a pool of skilled workers to cater for growing and changing future needs.

Members tell us:

“We are committed to continuous improvement of courses and seminars and their adaptation to the needs of the mills”

A survey of the educational opportunities in our member countries revealed a rich variety of national study programmes, seminars, courses and lifelong learning, which are building career paths and worker employability.

Best Practice

Occupational wellbeing study commences in the paper industry

The Finnish Forest Industries and the Finnish Paper Workers’ Union have launched a joint study of the different factors of workplace wellbeing for paper industry employees. Occupational wellbeing is a central issue in an industry that is undergoing powerful regeneration after experiencing significant changes in recent years. The Finnish Work Environment Fund has granted €150,000 to fund the two-year study, which will be carried out by the Finnish Institute of Occupational Health (FIOH), in addition to which the participating corporations will allocate personnel resources to assist researchers.



The aim of the study is to examine the current state of occupational wellbeing among paper industry workers as well as to identify its different constituent factors and the causes behind absences. Another aim is to look for best practise operating models, which have improved workplace wellbeing and led to reductions in absence rates.

The two-year study is scheduled for completion by the end of 2009, but the intention is to immediately apply in practice the knowledge accumulated during its course.

Production facilities from eight locations around Finland have been selected as research subjects. Occupational wellbeing will be examined through personal interviews, case studies and in workshops in cooperation with local actors, such as occupational health care professionals. Details of the study will be published on: www.forestindustries.fi

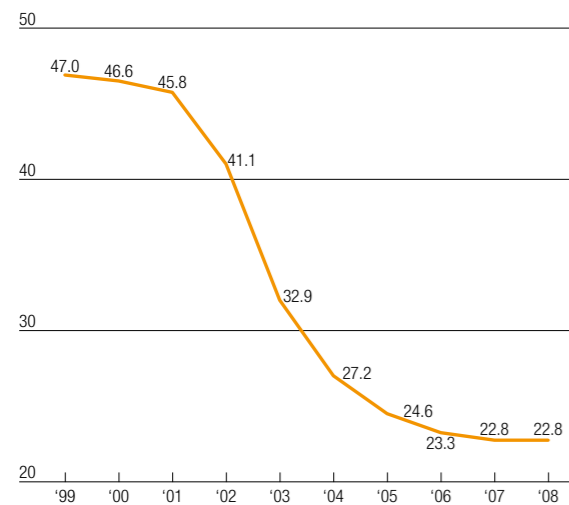
Progress in safety

A combination of employee education, better understanding of safety issues and implementing safety measures has led to actual improvement. A mill must show evidence of safety awareness to become OHSAS 18001 accredited.

In 2003, we set our zero-accident target. The declining rate of accidents causing an absence of more than three days in 2008 reached 22.8 out of 1000 people employed (from 23.3 out of 1000 in 2006). There was a drop in total accident levels over the reporting period; although CEPI acknowledges the recent drop in employment figures may have affected the incident rate.

Since 2007, joint activities with the European Mine, Chemical and Energy and Workers Federation (EMCEF) have highlighted that we have common goals in keeping the industry competitive and sustaining its growth. We worked together in raising the level of understanding for the impact of some EU legislation on our industry.

Incidence Rate (absence of more than 3 days)



Best Practices in Training

CEPI partnered the Dutch paper, board and corrugated board industry training centre VAPA to produce multi-media instruction modules for paper workers in the Netherlands and Belgium. The Paper Train project was completed in December 2008.

Spain's e-learning programme is financed by the government, trade unions, companies and the European Union, and is free of charge for companies and workers.

Swedish Forest industries Federation contributes to student education, bears the cost of internships and funds research.

The German paper industry employers' association (VAP) pays for laboratories and training facilities.

Lifelong learning opportunities receive trades union support in Sweden, Switzerland, Italy, Finland and Germany.

Our Austrian member association is helping to set up an engineering school focused on paper technology, to offer skilled workers and foremen a route to university.

Finnish Forest Industries is looking forward to a new vocational degree course starting in 2010:

“Education must respond to changing circumstances in the operating environment and satisfy new needs these changes entail.”

5

Annex

Summary Table of Indicators

INDICATOR	STATUS	PAGE
Economic Indicators		
Investment/turnover ratio	Updated	17
Paper consumption	updated	16
Imports and Exports	updated	56
Cost structure	Updated	18
Environmental impact of transport	updated	25-26
Paper production in the world	updated	15
Profitability	new	18
Environmental indicators		
Total specific primary energy consumption (TJ/kt)	13.41	23
Specific electricity consumption (MWh/t)	1.04	23
% of electricity produced through CHP compared to total on-site electricity generation	94.32	23
Water intake	New	30
Water consumption (million m ³)	220	30
Ratio of biomass-based energy consumption in total primary energy consumption	54.4	23
Absolute CO ₂ emissions from on-site consumption of fossil fuels (mega tonnes)	37.26	22
Specific CO ₂ emissions (kt CO ₂ /kt of product)	0.34	22
Indirect Absolute CO ₂ emissions (mega tonnes)	12.81	22
Indirect Specific CO ₂ emissions	0.11	22
% of mills certified with EMS (2002)	Only 2006	19
Specific amount of residues landfilled (kg/t of product)	17.77	38
Specific BOD load (kg/t of product)	0.86	20
Specific COD load (kg/t of product)	6.29	20
Specific AOX (kg/t of product)	0.029	20
Specific SO ₂ emissions (kg SO ₂ /t of product)	0.29	20
Specific Nox emissions (kg NOx/t of product)	0.84	20
Raw materials consumption	updated	35
Implementation of the Code of Conduct on legal logging	Updated	34-35
Development of more consistent reporting mechanism	updated	6
% of company owned/leased forest that are certified	82	35
% of round wood, chips and sawdust from certified sources	56	35
% of market pulp production capacity with chain-of-custody certification	90	35
% of paper, board and tissue production capacity with chain-of-custody certification	76	35
Promotion of biodiversity	Updated	34
Better understanding of paper consumption patterns	Updated	26
Recycling rate (%)	66.6	38
Responsible sourcing	updated	39-40
Social Indicators		
Incidence rate	22.8	48
Labour productivity	updated	18
Total workforce, employment type	243 300	15
Product responsibility	new	43

GRI Table of Indicators

INDICATOR	PAGE
1 - Strategic Analysis	
1.1 Statement of the organisation's vision and strategy regarding its contribution to Sustainable development	6
1.2 Description of key impacts, risk and opportunities	4-5
2 - Organizational Profile	
2.1 Name of the organisation	1
2.2 Primary brands, products and/or services	1
2.3 Operational structure of the organization including main divisions	9
2.4 Location of organizations headquarters	9
2.5 Number of countries where the organisation operates	3
2.6 Nature of ownership and legal form	backcover
2.7 Markets served	3
2.8 Scale of the reporting organisation	14-15
2.9 Significant changes during the reporting period regarding size, structure of ownership	15
2.10 Awards received	1
3 - Report Parameters	
3.1 Reporting period	1
3.2 Date of most recent previous report	6
3.3 Reporting cycle	1
3.4 Contact point for questions regarding the report or its contents	1
3.5 Process for defining report content	4-6
3.6 Boundary of the report	none
3.7 Specific limitations on the scope or boundary of the report	6
3.8 Basis for reporting on joint ventures etc.	CEPI is an association and does not have joint ventures, subsidiaries or outsourced operations.
3.9 Data measurement techniques and the bases of calculations, including assumptions and techniques underlying estimations applied to the compilation of the indicators and other information in the report	6
3.10 Explanation of the effect of any re-statements of information provided in earlier reports	6
3.11 Significant changes from previous reporting periods	6
3.12 Table identifying the location of the Standard Disclosures in the report	50-53
3.13 Policy and current practice with regard to seeking external assurance for the report	1
4 - Commitments and Engagement	
4.1 Governance structure of the organisation	8-9
4.2 Chair of the highest governance body	9
4.3 Organisation with unitary board structure	CEPI's board members are all independent from the organisation except the Managing Director.
4.4 Mechanisms for shareholders	As an association CEPI does not have shareholders.
4.5 Linkage between compensation for members of the highest governance body, senior managers and executives and the organisations performance	9
4.6 Processes in place for the highest governance body to ensure conflicts of interest are avoided	9
4.7 Process for determining the qualifications and expertise of the members of the highest governance body for guiding the organisations strategy on economic, environmental and social topics	9

GRI Table of Indicators

INDICATOR	PAGE
4.8 Internally developed statements of mission or values, codes of conduct and principles relevant to economic, environmental and social performance	9-10
4.9 Procedures of the highest governance body for overseeing the organisations identification and management of economic, environmental and social performance including internationally agreed standards and code of conduct	9
4.10 Processes for evaluating the highest governance body's own performance, particularly with respect to economic, environmental and social performance	There are no such processes in place at CEPI.
4.11 Explanation of whether and how the precautionary approach or principle is addressed by the organisation.	6
4.12 Externally developed economic, environmental, and social charters, principles or other initiatives	22 (carbon footprint framework), 23 (Declaration of intent on Renewable Energy Sources), 34 (Code of Conduct on legal logging), 43 (Guidelines for paper and board packaging for food contact)
4.13 Memberships in association and or national/international advocacy organisation	58
4.14 List of stakeholder groups engaged by the organisation	59
4.15 Basis for identification and selection of stakeholders with whom to engage	10
4.16 Approach to stakeholder engagement, including frequency of engagement by type and by stakeholder group	10
4.17 Key topics and concerns that have been raised through stakeholder engagement, and how the organisation has responded to those key topics and concerns	10-12
5 - Disclosure on Management Approach	
DMA EC - Economy and Competitiveness	15
DMA EN - Environment	19
DMA SO - Society	47
DMA LA - Labor Practices	47
DMA HR - Human Rights	47
DMA PR - Product Responsibility	47
6 - Performance Indicators	
Economic Performances	
Key challenges for the pulp & paper industry	14
Evolution of paper and board production	15
EC1 Investment turnover ratio	17
EC1 paper consumption per capita	16
EC1 Profitability of the industry	18
EC1 Labour productivity evolution	18
EC1 Average cost structure for the European paper industry	18
EC6 Trade data: home deliveries, exports	56
Environmental Performance	
EN29 Environmental impact of transport	26
EN3 Direct energy consumption by primary energy source	23
Indirect energy consumption by primary source	23
EN6 Electricity produced through CHP	23
EN6 Share of biomass from total primary energy consumption	23
EN26 Initiatives to mitigate environmental impacts of products and services - decoupling	20
EN8 Total water intake by source	30

GRI Table of Indicators

INDICATOR	PAGE
Environmental Performance	
EN21 Total water discharge by quality and destination	30
EN22 Specific amount of residues land filled	38
EN20 NO, SO by type and weight	20
EN16 Total direct and indirect greenhouse gas emissions by weight	22
EN 17 Other relevant indirect greenhouse gas emissions by weight	20
EN1 Raw material consumption in paper making	35
EN14 Illegal logging	34
EN14 Traceability of wood and pulp	17
EN14 Forest Certification	35
EN14 Biodiversity and related policies	34
EN2 Recycling rate and recovered paper	38
Best practices for countries	throughout
Society and Labour Practices and Product Responsibility	
SO1 Use of EMS in the European pulp and paper industry	21
SO5 Public Policy positions and participation in public policy developments	1
LA11 Specialist education facilities	47
LA7 Practices on recording and notifications of occupational accidents and diseases, and how they relate to the ILO Code of practice on Recording and Notification of Occupational accidents and Diseases	48
Best practices (examples from countries)	throughout
LA8 Training and education programmes in Europe	48
Best practices for countries	throughout
PR1 health and safety impact of products	43-44
HR CEPI is investigating the possibility to report on Human rights issues with it's members.	

REPORT APPLICATION LEVEL	C	C+	B	B+	A	A+
Standard Disclosures	G3 Profile Disclosures → OUTPUT	Report on: 1.1 2.1 - 2.10 3.1 - 3.8, 3.10 - 3.12 4.1 - 4.4, 4.14 - 4.15	Report on all criteria listed for Level C plus: 1.2 3.9, 3.13 4.5 - 4.13, 4.16 - 4.17	Report on each core G and Sector Supplement* Indicator with due regard to the Materiality Principle by either: a) reporting on the indicator or b) explaining the reason for its omission.	Same as requirement for Level B	Report on each core G and Sector Supplement* Indicator with due regard to the Materiality Principle by either: a) reporting on the indicator or b) explaining the reason for its omission.
	G3 Management Approach Disclosures → OUTPUT	Not Required	Management Approach Disclosures for each Indicator Category	Management Approach Disclosures for each Indicator Category	Management Approach Disclosures for each Indicator Category	Management Approach Disclosures for each Indicator Category
	G3 Performance Indicators & Sector Supplement Performance Indicators → OUTPUT	Report on a minimum of 10 Performance Indicators, including at least one from each of: Economic, Social and Environmental.	Report Externally Assured	Report on a minimum of 20 Performance Indicators, at least one from each of: Economic, Environmental, Human rights, Labor, Society, Product Responsibility.	Report Externally Assured	Report Externally Assured

*Sector supplement in final version

Assurance Statement



Assurance Engagement

plenum¹ was commissioned by the Confederation of European Paper Industries (CEPI) to perform an assurance engagement on the CEPI Sustainability Report to evaluate its adherence to reporting principles and the reliability of specified sustainability performance information contained in the Report. plenum is an Organizational Stakeholder of the Global Reporting Initiative (GRI),² and acts independently and impartially with regard to the reporting organisation. An assurance team competent to perform the tasks required used the AA1000 Assurance Standard 2008³ to carry out its review and prepare this Assurance Statement.

Level of Assurance

Plenum's assurance engagement provides a high level of assurance for adherence to the following GRI and AA1000 principles: materiality, completeness, stakeholder inclusiveness, sustainability context and responsiveness; and a moderate level of assurance for the information relating to sustainability performance in accordance with the GRI Performance Indicators.⁴

Criteria

The information in the Report was prepared by CEPI using the GRI Reporting Principles for Defining Quality.⁵ We evaluated the Report against these criteria, based on the assumption that the criteria are suitable for the performance of the assurance engagement.

Management Responsibilities

The CEPI management is responsible for the preparation of the Report and the information it contains, in adherence to the above-mentioned criteria. This responsibility includes developing, implementing and maintaining internal control aimed at ensuring that the Report does not contain any material false statements.

Assurance Process

Our assurance engagement is based on evidence obtained from the organisation at management level. The following steps were undertaken:

- We considered the possible assurance level based on the first draft of the Report and a series of discussions with CEPI management
- We determined the scope and level of assurance
- We made recommendations regarding the content based on the first draft of the Report
- We obtained and evaluated information on the processes which CEPI used to adhere to the GRI and AA1000AS principles
- We obtained and evaluated information on the systems and processes used by CEPI to collect, manage and aggregate specified reporting data
- We reviewed the principles and performance indicators using the above-mentioned criteria.

¹plenum - gesellschaft für ganzheitlich nachhaltige entwicklung gmbh [www.plenum.at]

²<http://www.globalreporting.org/>

³<http://www.accountability21.net/uploadedFiles/publications/AA1000AS%202008.pdf>

⁴See p. XY: „GRI table of indicators“

⁵<http://www.globalreporting.org/ReportingFramework/G3Online/DefiningReportQuality/>

Limitations

The basic data for the Sustainability Report were submitted by the National Associations of the CEPI. These were aggregate data concerning the member companies of the National Associations. Testing the quality of the original company data exceeded the scope of our engagement. Therefore the evaluation of the GRI Performance Indicators applies to the previously aggregated country data and focuses on the credibility of the information (moderate level of assurance).

Conclusion

Based on the assurance procedures we performed, we formed the following conclusions:

Principles

The reporting organisation adhered to all the principles which we evaluated. All the material sustainability issues identified by the stakeholders and CEPI are covered to an appropriate extent and in accordance with the GRI quality criteria. Stakeholder expectations receive sufficient attention, and the measures that have been or will be taken to meet them are credibly described.

GRI Performance Indicators

The Report provides in all material respects a reliable and sufficient representation of CEPI's policies, business operations, events and performance. Our evaluation of the credibility of the GRI Performance Indicators gave no indication that the Report contains any material false statements.

Recommendations

We recommend that CEPI's future reporting cover social aspects in even greater depth. It would also be useful to integrate sustainability in a more programmatic way, with guidelines, objectives and measures that are as binding as possible.

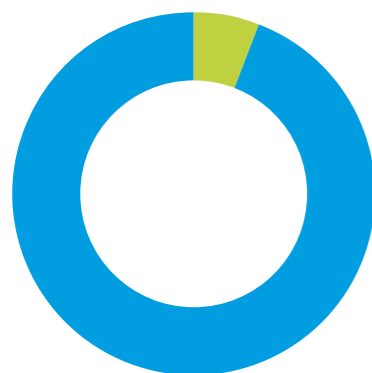
Plenum recognises CEPI's credible commitment to sustainability. The organisation's actions substantially contributes to ensuring the continual and sustainable development of the European paper industry.

DI Harald Reisinger,
Project Leader

DI Dr Alfred Strigl,
Executive Director

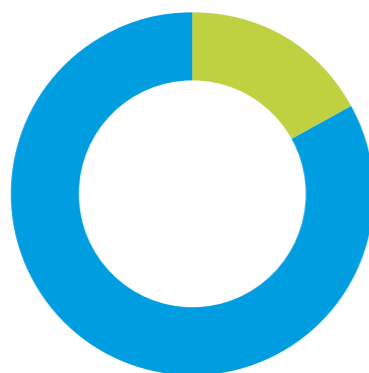
International Trade Data* - 2008

Share of "Home Deliveries" in European Paper Consumption



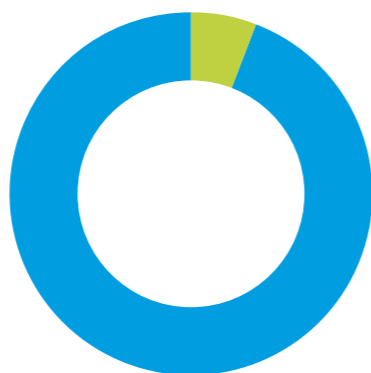
94% of the pulp and paper consumption is supplied domestically
6% of the paper & board consumption in the CEPI area is imported

Share of Exports in the European Paper Production



17% of the CEPI area production is exported; 83% is for domestic markets

"Market Share" of European Paper Industry Exports in the Rest of the World's Consumption



CEPI exports represent 6% of the rest of the world paper consumption

Source: CEPI and RISI
* CEPI Area

List of CEPI events 2007-2009

DATE	EVENT	LOCATION
2009		
25 March	Workshop: contribution of transport to carbon footprint	Brussels, Belgium
31 March	Workshop of the impact of the crisis	Brussels, Belgium
25 May	ICFPA Annual Meeting	Rome, Italy
28 May	4th International CEO's Roundtable	London, UK
29 June	Launch of Manifesto for Competitiveness and Employment	Brussels, Belgium
29 September	From Paper to Publishing: creating value for Europe	Brussels, Belgium
29 September	ERPC Recycling Award 2009	Brussels, Belgium
18-23 October	World Forestry Congress 2009 Side Event: Business Networking Day Side Event: Investment and Financing Forum	Buenos Aires, Argentina

List of CEPI events 2007-2009

DATE	EVENT	LOCATION
2007		
18 October	Bio-energy or Competitiveness: Meeting the target and protecting the economy	Brussels, Belgium
27-29 November	9th European Paper Week	Sheraton, Brussels, Belgium
2008		
4 March	Foire du Livre	Brussels, Belgium
9 April	Renewable energy: Is forest biomass the solution for the future?	European Parliament Brussels Belgium
5-9 May	Eforwood Week	Austria
20-21 May	FTP Event	Slovenia
27 May	Biodiversity protection, not just words on paper but real best practices by the paper industry!	COP9 CBD, Salon Hauptmann of the Hotel Maritim, Bonn
2-6 June	Green Week 'Sustainable Production and Consumption'	Brussels, Belgium
9 June	ICFPA Annual Meeting	South Africa
10 June	FAO - ACPWP Meeting	South Africa
10-11 September	Solander Symposium	Sweden
7 October	WORKSHOP on Detection and Removal of Contaminants From Recovered Paper	Brussels, Belgium
14 November	Joint Partnering Event for FP7 Projects	Stockholm, Sweden
19-21 November	Sustainable Manufacturing Summit Europe (Supported by CEPI)	Brussels, Belgium
25 November	From forest management to wood products and paper:	Brussels, Belgium
25-27 November	10th European Paper Week	Brussels, Belgium
25-27 November	Energy Intensive Industries and Climate Change (Supported by CEPI)	Brussels, Belgium
10 December	Fighting illegal logging: Obligation or opportunity?	European Parliament Brussels, Belgium

List of CEPI publications 2007-2009

Monitoring Report 2008 and 2007

Guide to an Optimum Recyclability of Printed Graphic Paper

Manifesto for Competitiveness and Employment

CEPI's Key Statistics 2008 and 2007

ICFPA Sustainability Update 2009

Story behind your paper

Generic Safety Information Sheet

Preliminary Statistics 2008 and 2007

Sustainability Newsletter No2

Fit for the Future - Europe's pulp and paper industry in 2020 and beyond

FTP - the First Year

Solid Biomass Mobilisation for the Forest-based Industries and the Bio-energy Sector

Overview CEPI Memberships

STAKEHOLDER NETWORKS	ISSUE
Business Europe Working Groups	Cross- industry issues
Society of European Affairs Professionals	Public Affairs Professionals
Federation of International Associations Established in Belgium	Belgian Association of International Organisations
European Association of Communication Directors	Communication Directors Group
European Water Partnership	Water issues
Forest Stewardship Council	Certification body
Programme for the Endorsement of Forest Certification schemes	Certification body
Sustainable Energy Europe Project	European Commission project
Water Footprint Network	Water issues
European Modular System	European Modular System
FAO Advisory Committee on Paper and Wood Products	Advise on emerging policies in the forest sector
Alliance for a Competitive European Industry	Issues touching competitiveness
International Council of Forest and Paper Associations (ICFPA)	International representation of the forest sector

Overview CEPI Networks

STAKEHOLDER NETWORKS	ISSUE
Advisory Committee on Forest-based Industries	Giving advice to DG ENTRE on forest sector
Advisory Group Forestry and Cork	Giving advice to DG AGRI on forest issues
Ministerial Conference on Protection of Forests in Europe (MCPFE)	Advise on emerging policies in the forest sector
Alliance of Energy Intensive Industries	Advocacy for energy policy
European Shippers Council	Transport
European Recovered Paper Council (ERPC)	Monitoring of Recycling Declaration progress
Paper Product Coordination Group	Coordinated and joint advocacy in policy related issues
REACH Alliance	Everything related to the implementation of REACH
Postal Users Group (PUG)	Postal services
Print Media Group	Paper Publishing chain
Food Contact Strategy Group	Guidelines on paper and board in Food contact Coordinated and joint advocacy. Biosafety and R&D, Consolidation of knowledge on safety
International Federation of Industrial Energy Consumers (IFIIEC)	
Brussels Associations Communicators Network (BACN)	Support in Communication
Forest Intergroup in the European Parliament	Forest related issues in the European Parliament

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Sweden - SFIF

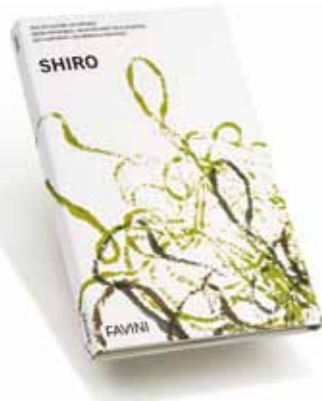
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Shiro Echo by Favini

Shiro Echo is a high quality printing paper made with recycled pulps and certified FSC mixed sources. It is part of the new Shiro, the break through range of environmental papers that includes Alga Carta, the paper famously made with algae from the Venice lagoon, waste that otherwise would have to be securely disposed of, and Shiro tree free made with non forest fibres such as bamboo, hemp, cotton, bagasse.

Shiro offers paper consumers a complete environmental choice - high quality recycled, completely tree free, waste from Venice which substitutes for wood pulp - and all made with green electrical energy to drastically reduce CO₂ emissions.

Case Study

For almost 20 years Favini has been committed to environmental initiatives. This reflects on our products and on the innovative technologies we use to recycle and purify the water in our two mills – now down to an industry leading 22 litres per kilo of paper. The Alga Carta story has recently been presented at the World Venice Forum 2009, the International Conference promoted by the International Academy of Environmental Sciences (IAES), an association created to highlight and to prevent environmental disasters.

Both Favini mills are FSC certified and have ISO 14001 and ISO 9001, Rossano also has OHSAS 18001, with Crusinallo to follow soon.

Favini is a specialist paper manufacturer with a history of over 270 years. It is a world leader in industrial release paper and has a strong market position in speciality fine paper with innovative and niche products. The company is based on two Italian mills (Rossano Veneto, near Venice, and Crusinallo, north of Milan) operating in the specialty fine paper and industrial release paper market, plus a converting division producing office and school articles. The two mills employ about 470 people.





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