

# A New Initiative on Speciality Paper Statistics

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# A New Initiative on Speciality Paper Statistics



## Introduction

- Speciality papers and board account for a relatively small share of the 400 million tonnes of paper and board consumed every year globally – between 5 and 7% of the total, depending on their specific definition
- Graphic in decline, packaging and tissue growing... speciality paper as well!
- Speciality papers and boards are found in almost every market sector: packaging and labelling, building and construction, food service, communication, security, medical, etc.
- No universal definition of speciality papers and boards...
- ...but speciality papers and boards differ from commodities: relate to niche markets, require a wide variation in terms of physical / optical / electrical / chemical properties according to application, detailed and often complex technical specifications, unusual raw material combinations, smaller machines

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## Introduction (continued)

Growing interest from papermakers for Speciality papers and boards:

- Higher profitability of specialty grades compared with commodity products
- Niche markets where competition is less intense
- Small but growing segments driven by new technology
- On-going use of older equipment that is no longer suited to large volume runs required for commodity products but still has added value in its capabilities

 Need to develop expertise, data and market intelligence

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## A New Initiative on statistics

- PaperImpact statistics as a starting point
- European Paper Week 2014, development of a new initiative, which aims at:
  - Enlarging the number of companies involved
  - Envisaging a broader coverage of products, and
  - Developing cooperation with other industry sector organisations
- Since Jan. 2015, CEPI has been in charge of the PaperImpact statistics collection, management and monthly reports release with delivery and order inflow data

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Scope: one-side coated paper for

- Wet-strength and non wet-strength labels
- Pressure sensitive materials (self-adhesive)
- Flexible packaging

Typical end-uses for these products are:

- Beverages: Beer, wines & champagnes, water, spirits, etc.
- Food and non-food packaging : yogurt, dried soups, flour, sugar, ice-cream, chocolate, coffee, tea etc.
- Luxury and personal healthcare: cosmetics, soap etc.



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## Definitions:

- Label Papers\* - one-side coated wet glue label papers wet-strength, all substances
  - Label Papers\* - one side coated wet glue label papers non-wet-strength, all substances
  - Flexible Packaging - one side coated paper, substance range <70gsm & 70-110gsm, 1 side Coated Papers - all grades / qualities:
    - *Including: several coatings (but always one side and always in reels)*
    - *Excluding: label (and label wet-strength), self-adhesive and silicone base paper, wall paper, envelopes, book jackets, paper in sheets*
    - *For Gift Wrapping: flexible packaging and others*
  - Release Liner (Clay-coated release liner) - one side coated and uncoated papers, substance <80gsm & >80gsm
- \* exc. Flexible packaging grades, poster papers, grades for self-adhesive labels and cast-coated papers

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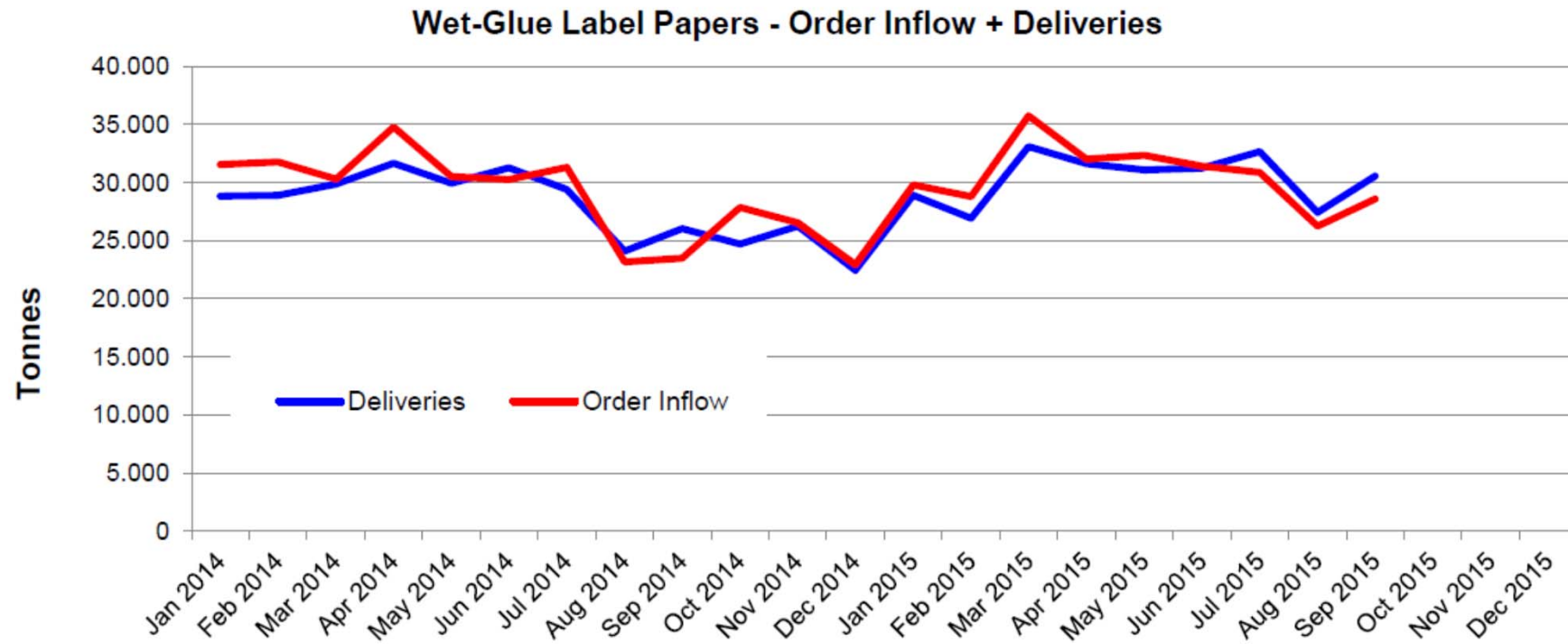


## Main features of the reports

- Monthly deliveries and order inflow in metric tonnes
- To main European countries and outside third countries / regions
- Compliance with EU competition rules
- Key elements:
  - 1) Precise definition the product segments
  - 2) Involvement of key players
  - 3) A critical mass in terms of coverage
- With the support of the CEPI Statistics team

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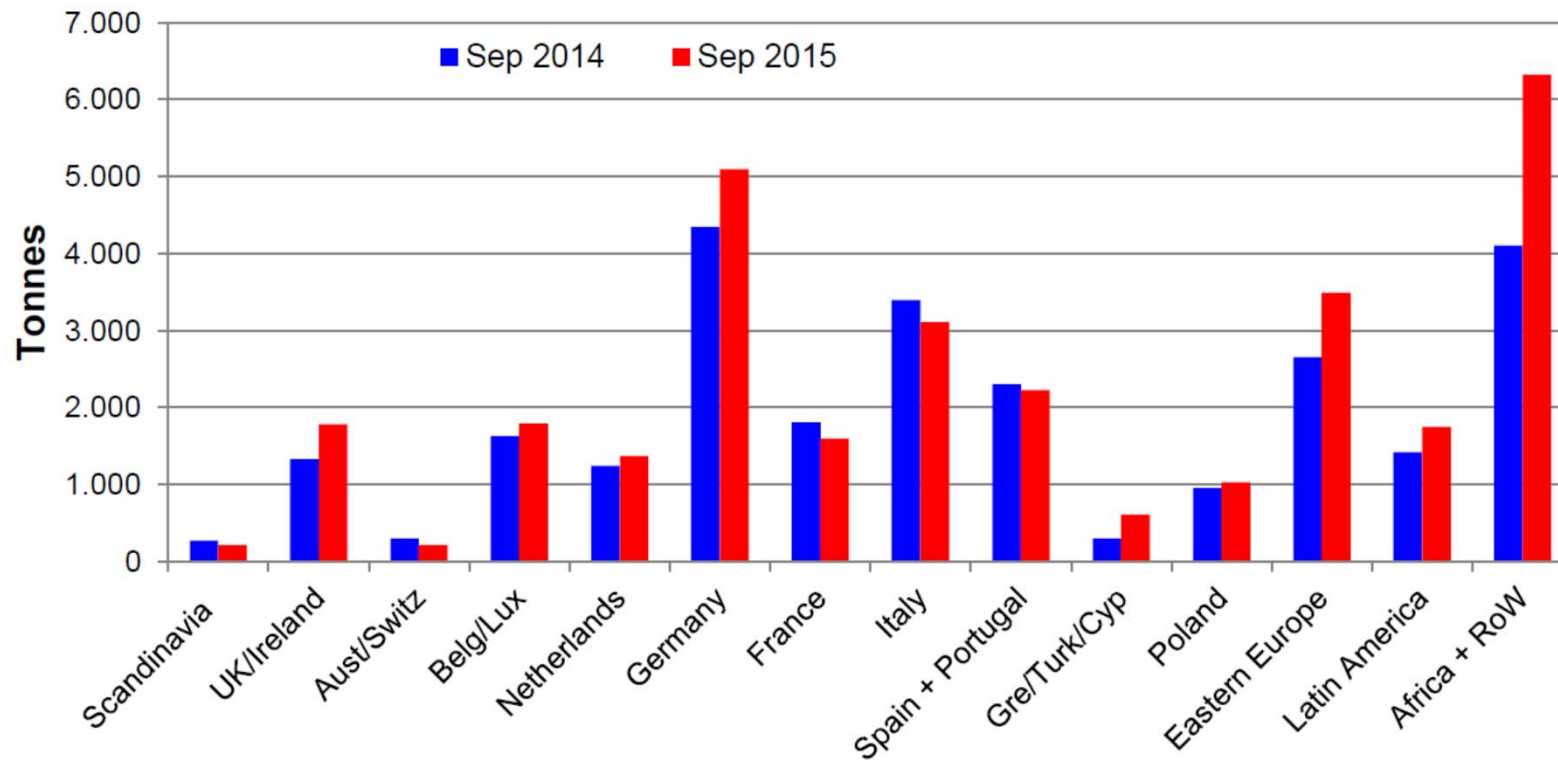
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### Wet-Glue Label Papers - Deliveries by Country



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## Companies involved:

- Arjowiggins
- BillerudKorsnas
- Brigl & Bergmeister
- Feldmuehle Uetersen
- Lecta/Torraspapel
- Lenzing
- Mosaico Burgo
- Munksjö
- Papel Aralar
- Sappi Europe
- Stora Enso
- Zanders GmbH

More than 700,000 tonnes delivered on a yearly basis!

On-going contacts with other companies interested in getting involved...

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## Next steps:

- Getting additional companies to join
- Continuously improving timing and layout
- Considering the inclusion of trade data
- Identifying needs for additional reports and assess feasibility (metallized paper?)
- Working on possible synergies with other paper trade organisations

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**More information?**

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# Thank you!

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