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Preliminary statistics 2015*

ACTIVITY

Million tonnes	2015	2015 / 2014	2015 / 2005
Paper and board production	90.8	-0.3%	-7.6%
inc. Graphic paper	35.4	-4.3%	-27.0%
Packaging paper and board	44.3	+2.3%	+12.4%
Sanitary and household paper	7.1	+1.5%	+12.6%
Market pulp production**	12.8	-2.7%	-2.5%
Paper for recycling utilisation	47.2	-0.7%	+1.0%

INDUSTRY STRUCTURE

	2015	2005
Turnover (Mio €)***	76,000	74,500
Number of companies	505	675
Number of mills	920	1,225
Number of paper machines	1,275	1,725

* These preliminary statistics are based on the CEPI data and companies financial reports available by mid-November 2015.

** Market pulp production hit a bottom in 2009 with 11.8 million tonnes, but has increased by 8.5% since then.

*** Turnover has increased by 2.8% in 2015 compared to 2014.

Note to the Editor

CEPI aisbl - The Confederation of European Paper Industries

The Confederation of European Paper Industries (CEPI) is a Brussels-based non-profit organisation regrouping the European pulp and paper industry and championing industry's achievements and the benefits of its products. Through its 18 member countries (17 European Union members plus Norway) CEPI represents some 505 pulp, paper and board producing companies across Europe, ranging from small and medium sized companies to multi-nationals, and 920 paper mills. Together they represent 23% of world paper and board production.

Website: <http://www.cepi.org>

For more information, please contact Ariane Crevecoeur at a.crevecoeur@cepi.org

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 **@EUPAPERWEEK #EPW15**
WWW.CEPI.ORG/EPW

CEPI declares The Age of Fibre has begun

Innovation in a sector can best be monitored by the latest products delivered to new and existing markets. The pulp and paper industry is forging ahead, transforming itself as we speak. Many exciting new products are coming to the market. More are in the pipeline. This overview is CEPI's celebration of the industry's achievements and offers a flavour of some of the most innovative new products (but it's by no means all of them). The publication is the third in a series, following the CEPI 2050 Roadmap and the Two Team Project. Take a look and see for yourself an industry in transformation.

In November 2011 CEPI launched the first 2050 Forest Fibre Industry Roadmap that defined the way for the industry to decarbonise by 80% and at the same time create 50% more value. This widely-recognised document has steered discussions on the future of our industry throughout Europe and beyond. To meet the challenge of breakthrough technologies, CEPI followed up with the Two Team Project, which delivered beyond expectations. The project came up with eight disruptive new concepts for pulp and papermaking in the world.

The breakthroughs presented in 2013, and the process that led to these concepts, put the pulp and paper industry on the map as a sector of innovation. Consortia of companies and research institutes are now developing these concepts further. But the proof of change is in the products that we deliver and the markets that we serve. This publication shows the clear progress made so far. There are developments in all product segments – graphic papers, tissue and hygiene papers, packaging and new bio-based solutions from both virgin and recycled fibre.

2050 Roadmap and Two Team Project: www.unfoldthefuture.eu

The Age of Fibre brochure is also available on <http://www.cepi.org/>

We can change the consumer perspective! - How Life Unfolds

The Paper & Packaging – How Life Unfolds™ campaign from the manufacturers and importers of paper and paper-based packaging highlights the important role paper and packaging play in our lives, helping us accomplish our goals at home, at school and in the workplace in the U.S.

The Paper & Packaging – How Life Unfolds™ campaign represents a unified effort by the paper and packaging industry to help slow the decline in paper usage and increase demand for packaging.

The consumer-focused Paper & Packaging – How Life Unfolds™ campaign reminds people of paper and packaging's continued relevance in their lives. The marketing initiative uses a storytelling approach to remind consumers of the creativity and warmth of a life with paper products, highlighting the products' functional and emotional role in our lives. The campaign generates appreciation for paper and packaging's ability to make our daily routines both possible and meaningful.

TV ads, print ads, digital ads and engagement on Facebook, Twitter, LinkedIn, YouTube and other social media launched on July 8, 2015.

The campaign, authorized for seven years by the U.S. Department of Agriculture (USDA) in 2014, will spend \$20 million in paid and earned media from July through December, collected from manufacturers and importers from four industry sectors, including printing and writing, Kraft packaging paper, containerboard and paperboard.

Paper and packaging is a \$132 billion industry in the U.S. offering over 375,000 jobs and creating over 5,000 products from paper and papermaking byproducts. The industry accounts for 2.6 percent of the U.S. manufacturing GDP.

Since 2000, the U.S. has seen a 56-pounds-per-person decrease in annual consumption of packaging paper and paperboard. In the same time period, annual per capita consumption of printing and writing papers has decreased by 108 pounds. Global paper and paperboard consumption is projected to increase by 10.8 percent by 2021.

The Paper and Packaging Board oversees the program. The board is composed of a five-person operational staff and is governed by a board of directors composed of 12 industry representatives from each of four industry sectors, as well as four regions of the country. The board includes an importer and a small company manufacturing between 100,000 and 250,000 short tons of paper annually.

The board was established by the USDA Paper and Paper-Based Packaging Promotion, Research and Information Order.

The Paper and Packaging Board establishes and guides promotions designed to expand demand for paper and paper-based products. Manufacturers and importers of these products participate in the Paper Checkoff, an industry-funded promotion program established by the USDA in 2014.

Link to: [How life Unfolds: http://www.howlifeunfolds.com/](http://www.howlifeunfolds.com/)

For more information, please contact Mary Anne Hansan, Executive Director at the Paper and Packaging Board: mahansan@paperandpackaging.org

The future of industry explained

Jeremy Rifkin biography

Jeremy Rifkin is the bestselling author of twenty-one books on the impact of scientific and technological changes on the economy, the workforce, society, and the environment. His books have been translated into more than thirty five languages and are used in universities, corporations and government agencies around the world.

On April 1st, 2014 Mr Rifkin's published his latest book, *The Zero Marginal Cost Society: The Internet of Things, the Collaborative Commons, and the Eclipse of Capitalism*. In 2011, Jeremy Rifkin published the New York Times bestseller *The Third Industrial Revolution*, which captured the attention of the world. Mr Rifkin's vision of a sustainable, post carbon economic era has been endorsed by the European Union and the United Nations and embraced by world leaders including Chancellor Angela Merkel of Germany, President François Hollande of France, and Premier Li Keqiang of China. Mr Rifkin's other recent titles include, *The Empathic Civilization*, *The Age of Access*, *The End of Work*, *The European Dream*, *The Biotech Century* and *The Hydrogen Economy*. Jeremy Rifkin has been an advisor for the past 15 years to the European Union. Mr Rifkin also served as an adviser to President Nicolas Sarkozy of France, Chancellor Angela Merkel of Germany, Prime Minister Jose Socrates of Portugal, Prime Minister Jose Luis Rodriguez Zapatero of Spain, and Prime Minister Janez Janša of Slovenia, during their respective European Council Presidencies, on issues related to the economy, climate change, and energy security. He currently advises the European Commission, the European Parliament, and several EU and Asian heads of state.

Mr Rifkin is the principal architect of the European Union's Third Industrial Revolution long-term economic sustainability plan to address the triple challenge of the global economic crisis, energy security, and climate change. The Third Industrial Revolution was formally endorsed by the European Parliament in 2007 and is now being implemented by various agencies within the European Commission as well as in the 28 Member States.

Jeremy Rifkin is the President of the TIR Consulting Group LLC, comprised of many of the leading renewable energy companies, electricity transmission companies, construction companies, architectural firms, IT and electronics companies, and transport and logistics companies. His global economic development team is working with cities, regions, and national governments to develop the Internet of Things (IoT) infrastructure for a Collaborative Commons and a Third Industrial Revolution. Mr Rifkin is a senior lecturer at the Wharton School's Executive Education Program at the University of Pennsylvania where he instructs CEOs and senior management on transitioning their business operations into sustainable Third Industrial Revolution economies. From 1995- 2010, Mr. Rifkin taught in the Advanced Management Program at Wharton.

Mr Rifkin's monthly column on global issues has appeared over the years in many of the world's leading newspapers and magazines, including *The Los Angeles Times* in the United States, *The Guardian* in the U.K., *Die Süddeutsche Zeitung* and *Handelsblatt* in Germany, *Le Soir* and *Knack* in Belgium, *L'Espresso* in Italy, *El Mundo* and *El País* in Spain, *Kathimerini* in Greece, *Information* in Denmark, *De Volkskrant* in the Netherlands, *Hospodárské Noviny* in the Czech Republic, *Wort* in Luxembourg, *Clarín* in Argentina, and *Al-Ittihad* in the U.A.E.

Mr Rifkin holds a degree in economics from the Wharton School of the University of Pennsylvania, and a degree in international affairs from the Fletcher School of Law and Diplomacy at Tufts University. Rifkin speaks frequently before government, business, labour and civic forums. He has lectured at hundreds of the world's leading corporations as well as more than 300 universities in some thirty countries in the past four decades. Mr Rifkin is the founder and president of The Foundation on Economic Trends (www.foet.org) in Bethesda, MD. The Foundation examines the economic, environmental, social and cultural impacts of new technologies introduced into the global economy.

What digital can do for the paper industry

New publication: Paper Industry 4.0

CEPI in cooperation with StepChange and SITRA have launched a brochure on the state of industry 4.0 in the pulp and paper industry. The European pulp and paper industry has experienced and consistently supported the three major phases of industrial transformation since the 18th century. From steam power to electric power, then to the progressive integration of automation and information technologies, today's paper industry stands ready to engage in its fourth industrial phase: industry 4.0.

Central to this next level of transformation is the abundance and utilisation of mass data, the ability to connect across the value chain in real-time, mass customisation and smart factories. More than simply another 'buzzword', industry 4.0 represents the next industrial revolution. This will contribute to Europe's re-industrialisation and industry's increased competitiveness.

Very soon, industry 4.0 will link product customisation with large production series, linking products to services and machines to machines. This will lead to faster, more flexible and more efficient manufacturing processes and shorter supply chains, so allowing an unprecedented level of 'mass individualised' customer service.

Today, the European pulp and paper industry is in full transformation. Both market and consumer needs have evolved, while policy pressure and global competition have increased. Therefore, industry has to innovate to remain competitive. Innovation can address not only processes, services and products, but also business models, workforce training and education. Consequently, our industry sees huge potential in 'digital', instead of treating it as a trend we are forced to compete with.

Please find more information on industry 4.0 at www.cepi.org

Gary McGann is the former Group Chief Executive Officer of the Smurfit Kappa Group (SKG), one of the leading providers of paper-based packaging solutions in the world.

Before joining the (then) Jefferson Smurfit Group in 1998 he held various executive positions at senior VP or CEO level in Irish industry in both the private and public sector. In 1968 he joined the Comptroller and Auditor General's office as an auditor. He joined LM Ericsson Limited as Management Accountant



in 1978 and later became Group Financial Controller of the Irish companies of LM Ericsson Group. He joined Gilbeys of Ireland Group as Group Finance Director in 1988 and was appointed Chief Executive in late 1991. He was also Chief Executive of their IFSC Company "Grand Met Finance Ireland" which he helped found in 1990. In early 1994, the Irish Government appointed him as Group Chief Executive of Aer Lingus, a position he held until 1998. He joined the Smurfit Group as Chief Financial Officer in August 1998. He was appointed President & Chief Operations Officer in December 1999, and was elected to the Group's Board in January 2000. He was appointed Chief Executive Officer in November 2002.

Gary is Chairman of Aon Ireland and Paddy Power plc. He is also a Director of Green Reit plc, Sicon Ltd (Sisk Group), a Director and former President of IBEC (Irish Business and Employers' Confederation), and a Director of the UCD Michael Smurfit Graduate Business School. He is also a former member of the ERT (European Round Table of Industrialists) and Chairman of CEPI (Confederation of European Paper Industries).

Gary obtained a Bachelor of Arts from U.C.D., is a Fellow of the Institute of Certified Accountants (FCCA), and holds a Master's degree in Management Science (MScMgnt). He is also an Honorary Fellow of the National College of Ireland.

Gary is a member of Las Brisas Golf Club, RIAC, Fitzwilliam Lawn Tennis Club, and The K Club. He is married to Moira and they have 3 daughters and two granddaughters. He enjoys golf, music and theatre.



Peter Oswald, 52

Chief Executive Officer Mondi Europe & International

Peter began his career with Deutsche Bank and automotive company KTM. He joined the Mondi Group in 1992.

After serving as chief executive of the bag and flexibles business from 1995 to 2001, overseeing its recovery and expansion, Peter was appointed chief executive of Mondi Packaging Europe in UK in 2002, leading its subsequent integration with Frantschach into the new Mondi packaging division in 2004.

At the beginning of 2008 Peter joined the Mondi Boards as chief executive officer of the Group's Europe & International Division, comprising all the former Mondi Packaging and Mondi Business Paper operations outside South Africa.

He is Chairman of the Committee of Resources, Energy and Ecology of the Austrian Industry Association and Chairman of the OMV Supervisory Board.

Peter holds a master of business from the WU-Vienna Business School and a master of law from the University of Vienna. He is married with three children.