The European paper industry on the road to Sustainable Development

November 2003
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Glossary and Acronyms

CEPI Members
"the management of resources so as to preserve their reproductive capacity for future generations"
As sustainable development has become an increasingly important factor for responsible businesses, the European paper industry has taken up the challenge of initiating the journey towards sustainable development within its own sector. The Confederation of European Paper Industries (CEPI) has decided to positively contribute to the three areas of sustainable development as they were outlined during the 1992 United Nations Conference on Environment and Development (UNCED): the economic, social and environmental pillars. Through this approach, CEPI wishes to demonstrate that the European paper industry is committed to ensuring that every part of the industry’s product cycle is becoming increasingly more sustainable through a continuous process of improvement.

The European paper industry is a major contributor to the quality of everyday life on a worldwide scale so, although meeting the challenge of sustainable development will be a lengthy and complex process, the outcome will be extremely worthwhile. Often defined as "the management of resources so as to preserve their reproductive capacity for future generations", it is clear that sustainable development requires the active involvement of all actors in society.

In order to promote and encourage sustainability, a balanced legislative framework is required, which ensures that measures taken are cost-effective and set fair global trade conditions so as not to jeopardise the competitiveness of the EU industry. CEPI strongly believes that social and environmental progress can only be promoted in a structure of healthy economic development because without profitable and competitive companies, targets cannot be met. CEPI has initiated a dialogue with other stakeholders so that opinions and information can be exchanged and is also set to publicise its own objectives, activities and performance.

Therefore, CEPI is proud to issue this first report on sustainable development entitled, "The European Paper Industry on the Road to Sustainable Development". The report aims to provide an overview of the industry’s profile, as well as transparent performance indicators and voluntary targets. It will be issued every two years to provide feedback on the European paper industry’s progress, activities and achievements. The title refers to a continuous development, in that the sustainability process will evolve with time to reflect the economic, social and environmental issues as they progress and as comments from stakeholders are taken into account.

CEPI is convinced that in the long run this pro-active approach will lead to increased profitability and competitiveness, as well as better social and environmental performance. On the whole, the industry’s image and future should greatly benefit from its travels along the road to sustainable development.

Michael Gröller
CEPI Chairman
Targets for 2004 and beyond: an overview
Economic Competence:

• The European paper industry aims to enhance and increase its value and financial position throughout the cycle by improving its competitiveness and innovation.

Social Well-Being:

• The European paper industry aims to develop harmonised definitions to better compare health and safety data and to strive towards a zero accidents industry.

• The European paper industry seeks to increase the employability of its workforce through increased and continuous training.

Resources, Processes, Products

The European paper industry aims to:

• increase the share of certified wood entering production.

• increase the number of Chain of Custody certificates in mills.

• raise the level of paper recycling in Europe, and is committed to reach a recycling rate of 56% (+/-1.5%) by 2005.

• systematically improve its knowledge on recovered paper flows.

• ensure that all pulp and paper produced in Europe comes from mills with an environmental management system.

• promote and monitor a consistent, accurate and transparent collection of greenhouse gas emissions data worldwide.

• report regularly in a transparent and accurate way on CO₂ (carbon dioxide) emissions from pulp and paper mills in CEPI countries as from 2005.

• raise the share of biomass from 49% to 56% on average in its on-site total primary energy consumption by 2010.

• gain a better understanding of and reduce the environmental impact of its in and outbound transport.
Principles of sustainable development
The European paper industry is a responsible business partner providing society with high-quality, safe and recyclable products made from renewable resources, which contribute to wealth through innovation, efficient and responsible use of resources and a sound environmental approach.

The industry is committed to further improve its sustainability record through continuous improvement of its economic, social and environmental performance.
The European paper industry is committed to the following fundamental principles in the three areas of sustainable development:

**Economic Competence:**

- Adding to the harmonious development of society by ensuring the industry’s contribution to wealth, employment, trade and quality of life in Europe.

- Long-term profitability and growth ensure the industry's ability to combine financial success with responsible environmental programmes and social achievements.

- Global competitiveness: contribute to Europe’s objective of being the most competitive region in the world.

**Social Well-Being:**

- Contribute to employees’ well being through education, training and measures aimed at personal development.

- Improved safety performance through continuous assessment and reduction of risks to employees.


- Increased dialogue and consultation through an open and trusting working environment within companies, with business partners, local partners and other stakeholders.

**Resources, Processes, Products:**

- Optimised use of resources and materials whilst reducing as much as possible its environmental impact at local and global level.

- Continuous environmental improvement by implementing sustainable forest management, environmental management systems, eco-design and similar improvement schemes.

- Ensuring products are safe, fit for use and recyclable.
The International Labour Organisation (ILO) was created in 1919 primarily to adopt international standards to cope with the problem of labour conditions. International labour standards are essentially expressions of international tripartite agreements on these matters. The ILO’s standards take the form of international labour Conventions and Recommendations of which eight have been identified by the ILO’s Governing Body as fundamental to the rights of human beings at work.

The Conventions are:

- **Freedom of Association**
  - Convention on the Right to Organise and Collective Bargaining (1949)

- **The Abolition of Forced Labour**
  - Convention on Forced Labour (1930)
  - Convention on the Abolition of Forced Labour (1957)

- **Equality**
  - Convention on Discrimination (1958)
  - Convention on Equal Remuneration (1951)

- **The Elimination of Child Labour**
  - Convention on Minimum Age (1973)
On the road to sustainable development: profiles, indicators and targets
1. Economic Competence

Profile: the European paper industry (2002 data)

- Turnover: €73 billion - the forest-based industry (FBI) cluster's (including forestry, woodworking, pulp, paper and board production, converting, packaging, printing, publishing and furniture industries) turnover reached ca. €400 billion.

- Employment: 250,000 people, and as the FBI cluster around 3.5 million people.

- 900 companies and some 1,260 mills.

- Production Growth: ca. 3% p.a. over the past decade and an expected 2.5% p.a. in the next years.


- Production in CEPI countries represents 28% of world production and consumption 25% of world consumption.

- The industry is highly capital-intensive, more and more cross-border integrated and partly dependent on overall economic conditions.

Indicators:

Although the European paper industry as such is not a large contributor to Europe's Gross Domestic Product (GDP), it is a major actor in Europe's economic and social life through its presence in various fields of the economy.

Graph 1: European paper industry's contribution to European Gross Domestic Product* (share of the paper industry, the chain and the FBI cluster)

* Chain: mechanical woodworking industries + pulp & paper and board manufacturing + paper & board converting + printing + publishing
Cluster: chain + furniture + machinery + equipment + chemical
Source: Eurostat (1998)
Graph 2: Evolution of the European paper industry’s turnover

Graph 3: European paper industry investments*

Capital expenditure definition:
Country data on capital expenditures include investments in primary manufacturing plants. Investments in converting facilities are typically excluded, though there are exceptions to this, depending on the availability of disaggregated investment information. Payments for acquisitions are not included in the capital expenditure data.

*Estimated Capital Expenditures

Source: CEPI, JPC

Graph 4: Paper and board consumption per capita: a few examples

CEPI paper consumption = 92,349 tonnes
CEPI population = 415 million

Source: CEPI and PPI
On the road to sustainable development

Target:

The European paper industry aims to enhance and increase its value and financial position throughout the cycle by improving its competitiveness and innovation.
2. Social Well-Being

Social Profile: the European paper industry (2001 data)

• 250,000 employees and indirectly some 3.5 million jobs through the FBI cluster.

• Major contribution to people living in rural areas and the development of small communities.

• The industry is a high-tech industry requiring well-trained and educated personnel and which promotes continuous training of its employees.

Indicator:

Rate of accidents

• More than 3 days of absence: 42 out of 1,000 people employed*
• Over 1 day of absence: 38 out of 1,000 people employed*

* data covering respectively 4 and 5 countries representing some 85% of paper production in CEPI countries

Individual companies support local communities in many ways, from sponsoring sport teams to building and supporting local schools. The industry is committed to investing in operations based on the principle of sustainable development and to working with local and other stakeholders to ensure that the environmental, social and economic benefits of our resources are available today and for future generations.

Targets:

The European paper industry aims to develop harmonised definitions to better compare health and safety data and to strive towards a zero accident industry.

The European paper industry seeks to increase the employability of its workforce through increased and continuous training.
On the road to sustainable development
The Industry’s Carbon Cycle

Forest-based products form part of an integrated carbon cycle. Sustainable forest management ensures a never-ending supply of raw material as well as the preservation of biodiversity. Through photosynthesis, water, carbon dioxide, nutrients and solar energy are converted into a renewable woody biomass. Once paper products have been used, they can be collected and used again, either as secondary raw material (for recycled paper production) or as biofuel. Environmentally, the industry’s sustainability assets are numerous: it is based on truly renewable resources grown in sustainably managed forests, recovered fibres now represent some 49% of the paper industry’s fibre raw materials, it relies heavily on biofuels and it is highly energy-efficient.
3.1. The Industry’s Raw Material: Virgin and Recovered Fibres

Profile: Forests

• In CEPI countries, the total forest area is ca. 129 million hectares (3.3% of the world’s forests, and 36.1% of the total land surface in CEPI countries) - it has increased on average by 370,000 hectares/p.a. since 1990 (FAO-TBFRA 2000).

• The gross annual increment in forests located in CEPI countries is 610 million m³ over bark.

• In CEPI countries, half of the forest surface is certified by independent forest certification schemes.

• The number of certificates of the Chain of Custody (tracing the certified material flow along the sourcing, transportation, storage, processing and selling phases) granted by forest certification schemes to CEPI companies is 1,671.

• The European paper industry’s virgin fibre input comprises a large share of wood from tree tops and branches, as well as from pre-commercial thinning operations, and sawmills’ residues.

Profile: Recycling

• The European paper industry is based on an essential complementarity between primary and secondary fibres, i.e. between virgin and recovered fibres.

• The paper industry is one of the leading recycling industries in Europe. The recycling rate reached 52.7% in 2002 against 41.4% in 1991 or 43.0 and 25.7 million tonnes respectively, i.e. an increase of 17.3 million tonnes.

• 49% of the paper industry's fibre raw materials are recovered paper.

• The increased collection of recovered paper has implications on the quality of paper collected and on the by-products stream, which may affect future performance.

• Recycling is part of the sustainable development approach as it is a part of the paper cycle and actually closes the loop.

• The growth in collection rate was initially modest, but jumped in the 1990s. Sooner or later the relative growth in paper collection will level out, and amounts collected and destined for recycling will grow/decrease together with paper consumption. The timing for this, and the "ultimate" collection rate level, will vary between countries and is, in parallel to the industry’s effort, influenced by policies, consumer awareness, etc.
Indicators Forests:

- 48% of total virgin fibre input used by the paper industry is certified by a forest certification management system.
- 89% of the surface of company-owned forests is certified.
- 27% of pulp production is covered by Chain of Custody certificates for virgin fibre.
- 15% of paper production is covered by Chain of Custody certificates for virgin fibre*.

* Paper production figures include paper produced from recovered fibre.

Indicators Recycling:

Graph 8: Share of raw materials in paper manufacturing - 1992 and 2002

Raw material shares - CEPI: 1992

- Non-Fibrous Materials: 16.1%
- Recovered Paper: 35.3%
- Pulp Other than Wood: 0.4%
- Woodpulp: 42.6%

Raw material shares - CEPI: 2002

- Non-Fibrous Materials: 14.5%
- Recovered Paper: 41.8%
- Pulp other than wood: 1.1%
- Woodpulp: 42.6%

Graph 9: Recovered paper utilisation and recycling rate in CEPI countries

- Recovered paper utilisation
- Recovered paper utilisation - extrapolation
- Recycling rate

*Extrapolated recycling rate figure

Source: CEPI
**Targets:**

The European paper industry aims to increase the share of certified wood entering production.
Existing credible certification schemes are included in the requirements to comply with the law against illegal logging, but they are only one option. Along with eco-management schemes (EMS), forest certification is another way companies can demonstrate they are not sourcing illegally logged wood.

The European paper industry aims to increase the number of Chain of Custody certificates in the mills.
Today, certification offers customers a guarantee that the wood-based products they purchase derive from wood from responsibly managed forests. In addition it aims to reassure society that forests are taken care of. The certification of the Chain of Custody ensures that certified wood is traceable and that, at the very end of the chain, labelled products are indeed made from certified wood.

The European paper industry aims to raise the level of paper recycling in Europe, and is committed to reach a recycling rate of 56% (+/-1.5%) by 2005.
In 2000, the European paper industry voluntarily adopted the European Declaration on Paper Recovery through which it committed to reach a recycling rate of 56% by 2005. Taking into account the expected growth in paper consumption, the amount of paper recycled in 2005 would be around 50 million tonnes, i.e. some 11 million tonnes higher than in 1999.

The European paper industry aims to systematically improve its knowledge on recovered paper flows.
Improved knowledge on recovered paper flows will contribute to reaching the 56% recycling rate by 2005 and will help to assess the future potential of paper recycling in Europe. The constantly increasing European collection rate will reach a levelling-off-phase – 16 out of 19 countries have experienced a decreasing collection rate in the past five years. To safeguard future increases in paper recycling in Europe, better information is needed on collection potential (share of non-collectable and non-recyclable paper products, trade of converted paper products, paper destined to other recovery options than papermaking, etc.), effectiveness of recovered paper collection systems and global trade flows.
3.2. Product Process Efficiency

Environmental Management Systems

The European paper industry is convinced of the value of environmental management systems and has long promoted the adoption of such schemes on a voluntary basis. Environmental management systems provide useful tools to improve environmental performance and to assess the progress made. They also communicate the message that the industry strives for a continuous improvement of its production process.

Indicator:

- In 2002, over 60% of the pulp and paper produced in Europe came from mills certified with an environmental management system (ISO 14001 or EMAS).

Target:

The European paper industry aims to ensure that all pulp and paper produced in Europe comes from mills with an environmental management system. The European paper industry is convinced that the backbone of any sustainable development approach in manufacturing industries is environmental management. The industry’s vision is therefore that all pulp and paper produced in Europe comes from mills with an environmental management system. A progress report will be given every two years.
3.3. Climate and Energy

Profile: Climate and Energy

- The European paper industry’s direct carbon dioxide (CO₂) emissions (CEPI countries) represent less than 1% of the total EU industrial CO₂ emissions.

- The industry’s specific primary energy consumption decreased by 10% (1990/2002).

- Specific CO₂ emissions from fossil fuels decreased by over 25% (1990/2002).

- The industry is the largest user and producer of renewable energy sources (RES): on average over 50% of the industry’s energy comes from carbon dioxide neutral fuels.

- The industry represents some 13% of the total use of renewable energy sources in the EU.

- The industry has invested heavily in on-site combined heat and power (CHP) technology, which allows for some 30-35% energy savings.

- Although some 90% of mills’ electricity demand is already generated by CHP technology, there is further potential for reducing energy use. This depends on open and stable energy markets and access to the grid for balancing surplus electricity and heat demands.

Indicators:

Graph 10: Absolute and specific CO₂ emissions from on-site consumption of fossil fuels (direct emissions)

Data represent 92% of products (market pulp, paper and board)
Graph 11: Primary energy consumption by energy carrier (TJ)

Data represents 94% of products (market pulp, paper and board)
Source: CEPI

Graph 12: Specific primary energy consumption, electricity consumption and production in the European paper industry (index 1990-2002)

Data covers some 91% of products (market pulp, paper and board)
Source: CEPI

Graph 13: Ratio biomass-based energy consumption in total primary energy consumption

Data represent 94% of products (market pulp, paper and board)
Targets:

The European paper industry aims to promote and monitor the consistent, accurate and transparent collection of greenhouse gas (GHG) emissions data worldwide. The International Council of Forest and Paper Associations (ICFPA) developed an international methodology for estimating greenhouse gas emissions from pulp and paper mills. The calculation tools address the industry’s specific attributes and ensure that assumptions and calculations used are transparent, accurate, comparable worldwide and easily understood. They are based on existing protocols developed by the World Resource Institute (WRI) and the Intergovernmental Panel on Climate Change (IPCC). They have been endorsed by WRI and are available on the WBCSD’s website dedicated to the GHG protocol www.ghgprotocol.org and on CEPI’s website www.cepi.org.

The European paper industry aims to report regularly in a transparent and accurate way on CO₂ (carbon dioxide) emissions from pulp and paper mills in CEPI countries as from 2005. As from 2004, CEPI will collect CO₂ emissions data from European pulp and paper mills through its national associations to ensure a sound reporting of emissions and provide additional knowledge on CO₂ emissions in Europe. The inventory addresses core pulp and papermaking operations and indirect emissions. The User’s Manual and associated worksheet, based on the International Calculation Tools, will also facilitate mills’ compliance with the emissions trading reporting obligations.

The European paper industry aims to increase the share of biomass from 49% to 56% on average in its on-site total primary energy consumption by 2010. To further contribute to the renewable energy sources targets put forward by the Community while maintaining the sustainability of the forest eco-cycle, the paper industry proposes the following:

• Increase awareness and value of the life and carbon cycle of wood and paper products, thereby giving recognition to the use of CO₂-neutral wood in production and its recyclability while better fulfilling ratified international commitments (e.g. climate change).
• Procurement conditions that secure the availability of major raw materials (such as wood and recovered paper).
• Production residues and by-products (e.g. bark, black liquor, bio-sludges etc.) not suitable for use as raw material are to be considered as renewable energy sources.
• A level playing field enabling fair competition in the use of renewable energy sources should be established.
3.4. Water, Effluents and Waste

Profile: Water, Effluents and Waste

- Over 70% of the water intake is used as process water.

- Over 95% of effluents are treated by primary or secondary treatment methods.

- The bleaching of pulp with chlorine gas has been substituted by cleaner technologies and consequently, specific discharges of organic chlorine compounds (AOX) have been reduced by over 90% (since 1990).

- Residues are not automatically considered as waste but rather as by-products, which in most cases will take on a new role as raw material for recycling. When a product can no longer be recycled, it can be used for energy production, composting or use in other industries, leaving a small balance only suitable for landfilling.

- Most of the industry’s residues are biomass and minerals. Where these are below acceptable safety levels, the industry believes there is an opportunity to reduce amounts going to landfill further still by investigating new product development. Defining such by-products streams as “wastes”, however, inhibits such progress, whereas research and development programmes show the existing potential.

Indicators:

Graph 14: Specific loads of BOD and COD in discharge effluents

Data covers about 70% of products (market pulp, paper and board)
Target:
The European paper industry aims to gain a better understanding of and reduce the environmental impact of its in and outbound transport.
Glossary

- **Apparent collection**: Utilisation plus exports minus imports of recovered paper.
- **Biofuel**: Renewable fuel originating from biomass as e.g. biodiesel or bark.
- **Biomass**: Non-fossilised organic matter.
- **Biochemical oxygen demand (BOD)**: Measure for the concentration of organic substances in effluent water i.e. The total amount of organic compounds. The amount of dissolved oxygen consumed by micro-organisms to decompose organic compounds in water in a specified number of days.
- **Chain of Custody**: Flow of forest products from their origin to their end-use.
- **Chemical oxygen demand (COD)**: Measure of both easily degradable substances and organic substances that degrade with more difficulty in effluent water, i.e. the total amount of organic compounds. The amount of oxygen required for the complete decomposition of organic compounds in water, determined by chemical methods.
- **Collection rate**: Percentage of apparent collection compared to total paper consumption.
- **Combined heat and power (CHP)**: Generation of both heat and electricity from fuel; more efficient than normal fuel burning.
- **Environmental management system (EMS)**: The part of the overall management system which includes structures, practices, procedures and resources for the systematic implementation of an organisation’s own environmental policy.
- **Forest certification**: A means of protecting forests by promoting environmentally responsible forestry practices. Forests are evaluated according to international standards and certified as well as managed by a qualified independent auditor (or certifier). Wood or wood products from those forests are then labelled so that consumers can identify them.
- **Fossil fuels**: Natural carbon-based substance produced by the breakdown of organic matter buried deep down in the earth’s crust. These include gaseous fuels (natural gas), liquids (oil) and solids (coal).
- **Market product**: Market pulp and paper.
- **Volume Over Bark**: A unit of wood, bark included.
- **Photosynthesis**: The metabolic process by which plants take CO₂ from the air and use solar radiation and nutrients to build plant material, releasing oxygen in the process.
- **Recovery rate**: The ratio between paper and board products recovered and paper consumption.
- **Recycling rate**: Percentage of recovered paper utilisation compared to the total paper consumption.
- **Renewable energy source**: The following non-fossil energy sources: wind, solar, geothermal, wave, tidal energy; hydropower; biomass; landfill gas; sewage treatment plant gas and biogases.
- **Sustainable development**: Development that meets the needs of the present without compromising the ability of future generations to meet their own needs.
- **Utilisation rate**: Percentage of recovered paper utilisation compared to the total paper production.

**Abbreviations/Acronyms**

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<tr>
<th>Acronym</th>
<th>Description</th>
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<tr>
<td>AOX</td>
<td>Absorbable organo-halogens</td>
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<td>BAT</td>
<td>Best Available Technique</td>
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<td>BOD</td>
<td>Biological Oxygen Demand</td>
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<td>CHP</td>
<td>Combined Heat and Power</td>
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<td>CO₂</td>
<td>Carbon dioxide</td>
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<tr>
<td>COD</td>
<td>Chemical Oxygen Demand</td>
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<td>EMAS/ISO 14001</td>
<td>Eco-Management and Audit Scheme</td>
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<td>EMS</td>
<td>Environmental Management Systems</td>
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<td>ENGOs</td>
<td>Environmental Non-Governmental Organisations</td>
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<td>FAO</td>
<td>Food and Agricultural Organisation of the United Nations</td>
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<td>GDP</td>
<td>Gross Domestic Product</td>
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<td>GHG</td>
<td>Greenhouse gas emissions</td>
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<td>ICFPA</td>
<td>International Council of Forest and Paper Associations</td>
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<td>ILO</td>
<td>International Labour Organisation</td>
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<td>JPC</td>
<td>Jaakko Pöyry Consulting</td>
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<tr>
<td>NOX</td>
<td>Nitrogen Oxides, including nitric oxide (NO) and nitrogen dioxide (NO₂)</td>
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<td>PPI</td>
<td>Pulp and Paper Industry magazine, part of Paperloop.</td>
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<td>RES</td>
<td>Renewable Energy Sources</td>
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<td>SO₂</td>
<td>Sulphur dioxide</td>
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<tr>
<td>TBFRA</td>
<td>Temperate and Boreal Forest Resource Assessment</td>
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<tr>
<td>WBCSD</td>
<td>World Business Council on Sustainable Development</td>
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