Preliminary indications are that imports of paper & board into the region appear to have decreased by over 11% over 2011. Imports from other European countries accounted for 41% of all imports in the first three quarters of 2012 (41% 2011) and imports from North America had a share of 34% (33% in 2011), with the remaining 23% split virtually equally coming from the other regions (Latin America, Asia and the rest of the World).

Overall paper & board consumption estimated to fall by between 4% and 5%

It appears that the overall consumption of paper and board in CEPI countries in 2012 decreased by between 4% and 5% when compared to 2011, based on the latest data available. The unfavourable economic context – EU GDP is expected to have fallen by 0.3% in 2012 – combined with the impact of some long-term trends in the graphic paper chain explain this evolution. Due to the weak starting point, the gradual recovery beginning in 2013 will result in a low annual GDP growth rate of 0.4% for 2013 in the EU. In 2014 the EU GDP growth is forecast to rise to around 1.6%.

CEPI countries in 2012
Austria, Belgium, Czech Republic, Finland, France Germany, Hungary, Italy, Norway, Poland, Portugal, Romania, Slovak Republic, Slovenia, Spain, Sweden, The Netherlands, United Kingdom

Note: CEPI totals no longer include data for Switzerland.
Total pulp production shows a decline but market pulp output increases

It is estimated that the production of pulp (integrated + market) has decreased by up to 1% when compared to the previous year, with total output of approximately 38 million tonnes. Output of mechanical pulp is believed to have decreased by around 4.5% whilst production of chemical pulp increased by 0.5% when compared to 2011. It is estimated that output of market pulp increased by about between 4% and 4.5%, while integrated pulp output decreased by 3% in 2012 when compared to 2011, as a result of the closures of the paper units in integrated mill sites.

Usage of paper for recycling also decreases

It is estimated that consumption of paper for recycling by CEPI members fell by between 1% and 1.5%.

Paper & board deliveries by CEPI countries decrease by between 1.5% and 2% but benefit from foreign markets relative dynamism

Based on the cumulative data up to the end of the third quarter of 2012 it is expected that total paper & board deliveries for the year will have fallen by over 2% when compared to 2011. By the end of September 2012, deliveries of graphic grades had decreased by over 3% and deliveries of packaging grades had fallen by just over 1%. Exports had risen by over 4% by the end of September with the main markets for exports being other European countries, which took about 35% of all exports (37% in 2011), with deliveries to Asian countries taking around 28% (28% in 2011) and 10% being exported to North America (10% also in 2011).