



Preliminary Statistics 2014

Confederation of European Paper Industries

The production of paper by CEPI countries has shown relative stability in 2014, after a 4% cumulative decline between 2010 and 2013

Paper and board production in CEPI Countries decreases by around 0.2%

Paper and board production by CEPI member countries fell slightly, by around 0.2% in 2014 according to preliminary figures. Total production in 2014 was around 91 million tonnes, 10% below the pre-financial crisis level. Mill and machine closures in the EU-28 in 2014 amounted to 0.9 million tonnes whilst new capacities or upgrading of existing ones reached 0.5 million tonnes. While the EU-28 countries have registered a 0.2% decrease in production, United States and Canadian production are expected to be down by 1.4% and 0.7% respectively. In addition production has fallen by 0.4% in both South Korea and Brazil. In contrast, Japanese paper production is expected to have risen by 1.1%. The highest growth rates in paper output appear to have been recorded by Russia (+4.2%), India (+3.9%) and China (+2.8%). According to early estimates, world paper and board production has increased by 0.7% in 2014.

Production of paper and board in CEPI countries 1991 - 2014



Source: CEPI (2014 estimated)

Output of graphic grades continues to decline whilst packaging grades show growth over 2013

In sectoral terms, the decline in the production of graphic grades witnessed over recent years has continued whilst output of packaging grades continued to show growth. Weak printing and publishing activities continue to have an impact on the overall production of graphic grades, which fell by 3%. Output of newsprint is expected to fall around 7%. Production of uncoated woodfree grades is estimated to have increased by 1.2% compared with 2013 whilst output of uncoated mechanical grades fell by 3.5%. Output of coated woodfree grades decreased by around 1.3% and output of coated mechanical grades fell by around 5.2%. The overall result is that production of uncoated graphic grades is expected to decrease by around 0.7% and coated grades by about 3.2%. Mechanical graphic grades, excluding newsprint, registered an estimated decrease in output of 4.5% and production of woodfree grades an unchanged overall total compared with 2013.

Exports had fallen by over 2% by the end of September with the main markets for exports being other European countries, which took about 36% of all exports (36% in the same period of 2013), with deliveries to Asian countries taking around 27% (like in 2013), 10% being exported to North America (11% in 2013), 9% to Latin America and 18% to all other countries.

Preliminary indications are that imports of paper and board into the region appear to have increased between 3.5% and 4% over 2013. Imports from other European countries accounted for 42% of all imports in the first three quarters of 2014 (40% 2013) and imports from North America had a share of 30% (33% in 2013), with the remaining 28% split between the other regions - Asia 11%, Latin America 8%, and the rest of the World 9%.

Overall paper and board consumption estimated to rise between 0.5% and 1.0%

It appears that the overall consumption of paper and board in CEPI countries in 2014 increased by between 0.5% and 1.0% when compared to 2013, based on the latest data available. This increase comes after three years of decline. In Europe, GDP growth forecasts have been revised down. In EU28 and the euro area GDP growth is projected to be 1.5% and 1.1% respectively in 2015, after +1.3% and +0.8% the previous year. Economic activity should however gradually strengthen in 2015 and accelerate further in 2016, as the legacies of the crisis fade away and thanks to a weaker Euro, low oil price and low interest rates.

CEPI countries in 2014

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

Issue dates for other statistics

Annual Statistics 2014
June 2015

Key Statistics 2014
June 2015

Historic Statistics 1991-2014
August 2015

Trade Statistics 2014
September 2015

Preliminary Statistics 2015
February 2016

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See also www.cepi.org/topics/statistics

More detailed statistics (monthly, quarterly & annually)
can be ordered.

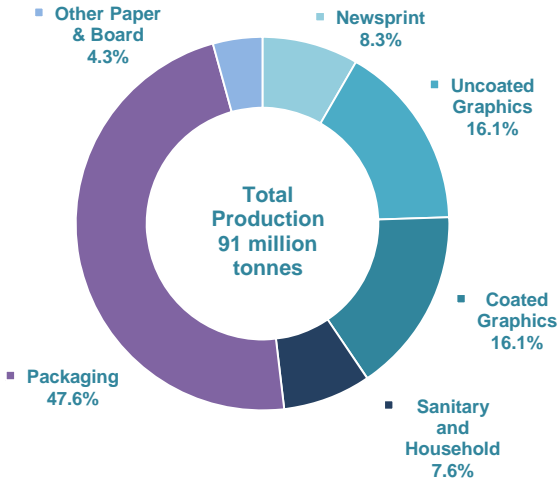
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Production of paper and board by grade in CEPI countries in 2014

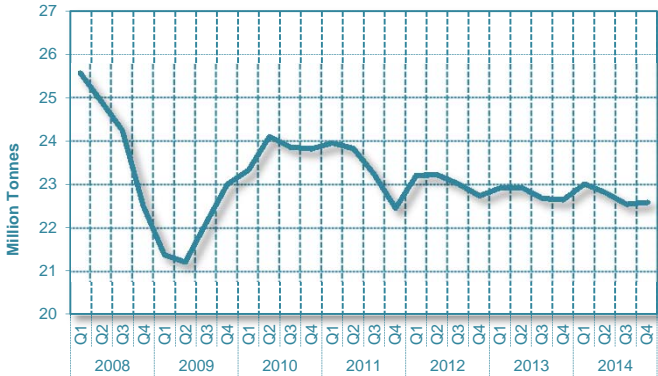


Source: CEPI estimates

The production of packaging grades is estimated to have increased by around 1.9% when compared with 2013. Within the packaging grades, case materials recorded an increase in production of around 2.2%. The output of carton board has shown a small growth of 0.3% while the production of wrapping grades increased by around 5%. Production is impacted by the on-going trend towards light-weighting and resource efficiency as it is measured in tonnes. The share of packaging grades accounted for 47.6% (45.9% in 2013) of the total paper and board production, with graphic grades taking 40.5% (41.9% in 2013).

Hygienic paper manufacturers are estimated to have seen a small fall in output of around 0.3% when compared with 2013 and accounted for 7.6% of total production. Output of all other grades of paper and board - mainly for industrial and special purposes - increased by 3.6% (4.3% of total production).

Production of paper and board in CEPI countries, quarterly trends 2008 - 2014

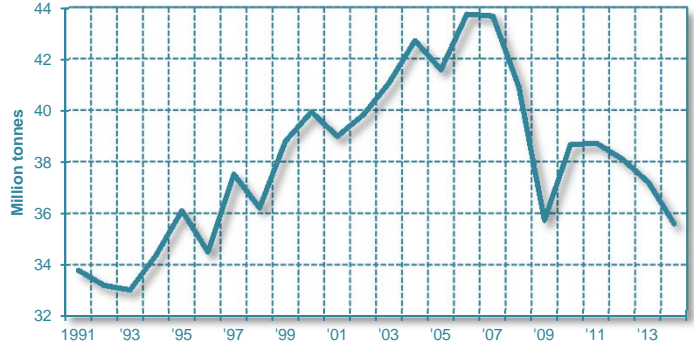


Source: CEPI estimates (Q4 2014 estimated)

Total pulp production falls by 4.3% and market pulp output decreases by around 3.7%

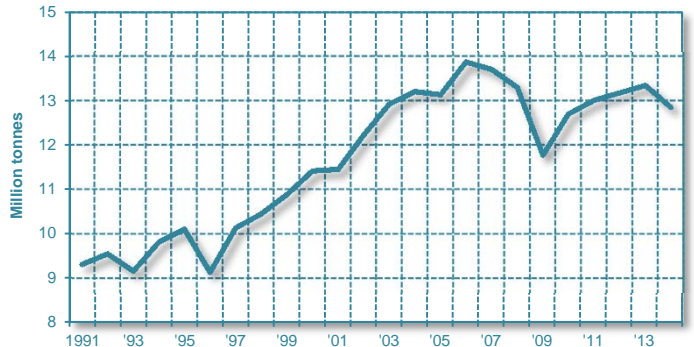
It is estimated that the production of pulp (integrated + market) has decreased by around 4.3% when compared to the previous year, with total output of approximately 36 million tonnes. Output of mechanical pulp has decreased by around 6.0% whilst production of chemical pulp decreased by around 3.5% when compared to 2013. It is estimated that output of market pulp decreased by around 3.7%.

Production of pulp in CEPI countries 1991 - 2014



Source: CEPI (2014 estimated)

Production of market pulp in CEPI countries 1991 - 2014

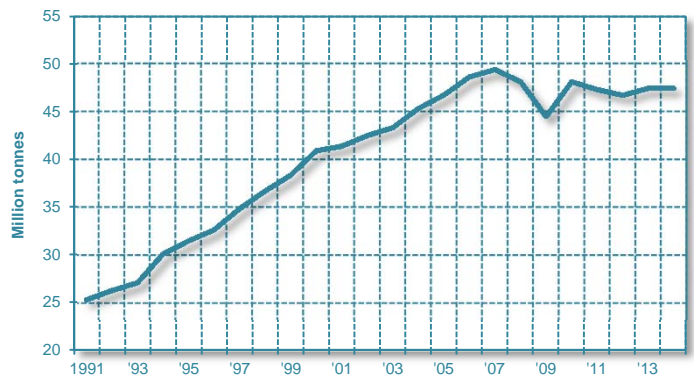


Source: CEPI (2014 estimated)

Utilisation of paper for recycling unchanged compared to 2013

It is estimated that the utilisation of paper for recycling by CEPI members was unchanged when compared to 2013 at 47.5 million tonnes. As in recent years, the fall of the graphic paper sector demand was offset by the more positive development in the packaging paper and board sector.

Utilisation of paper for recycling in CEPI countries 1991 - 2014



Source: CEPI (2014 estimated)

Paper and board deliveries by CEPI countries are expected to decrease between 0.5% and 1.0% compared with 2013

Based on the cumulative data up to the end of the third quarter of 2014 it is expected that total paper and board deliveries for the year will have fallen by between 0.5% and 1.0% when compared to 2013. By the end of September 2014, deliveries of graphic grades had decreased by 3.3% whilst deliveries of packaging grades rose by 2.5%.