Preliminary indications are that imports of paper and board into the region appear to have increased by between 1.5% and 2% in 2014. Imports from other European countries accounted for 44% of all imports in the first three quarters of 2015 (42% in 2014) and imports from North America had a share of 30% (30% in 2014), with the remaining 26% split between the other regions - Asia 11%, Latin America 8%, and the rest of the world 7%.

Overall paper and board consumption estimated to remain unchanged

It would appear that the overall consumption of paper and board in CEPI countries in 2015 was relatively stable compared to 2014, based on the latest available data. The December 2015 macroeconomic projections for the euro area are broadly unchanged and foresee annual real GDP increasing by 1.6% in 2015, 1.8% in 2016 (1.9% and 2.0% respectively for the EU). The slowdown and rebalancing of the Chinese economy, lower commodity prices, and strains in some large emerging market economies will continue to weigh on growth prospects in 2016–17.

CEPI countries in 2015

Austria, Belgium, Czech Republic, Finland, France, Germany, Hungary, Italy, Netherlands, Norway, Poland, Portugal, Romania, Slovak Republic, Slovenia, Spain, Sweden, United Kingdom
The production of packaging grades is estimated to have increased by around 2.6% compared to 2014. Within the packaging grades, case materials recorded an increase in production of around 3.0%. The output of carton board grew by 1.4% and the production of wrapping grades showed a small increase of around 0.1%. Production is impacted by the ongoing trend towards light-weighting and resource efficiency as it is measured in tonnes. The share of packaging grades accounted for 48.9% (47.6% in 2014) of the total paper and board production, with graphic grades taking 38.8% (40.5% in 2014).

Sanitary and household manufacturers are estimated to have seen an increase in output of around 1.8% compared to 2014 and accounted for 7.8% of total production. The output of all other grades of paper and board - mainly for industrial and special purposes - increased by around 2.0% (4.4% of total production).

It is estimated that the production of pulp (integrated + market) has decreased by around 0.4% compared to 2014 at 44 million tonnes. As in recent years, the fall of the graphic paper sector demand was partly offset by the more positive development in the packaging paper and board sector.

Exports had fallen by 1.2% by the end of September with the main markets for exports being other European countries, which accounted for about 36% of all exports (36% in the same period of 2014), with deliveries to Asian countries accounting for around 27% (as in 2014), 11% being exported to North America (10% in 2014), 9% to Latin America and 17% to all other countries.