The CEPI 2050 roadmap

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Today's programme

09:00 Opening and Welcome
09:00 The CEPI 2050 roadmap
09:20 How to capture the future – Petri Vasara
09:40 The company view – Hans Sohlström
10:00 Double dividend policy – Tomas Wyns
10:20 The enabling policies
10:30 Q and A
10:40 Closing remarks
10:45 The End (or The Start)
Intro by video
The process

• CEPI started the project in January 2011.
• A dedicated group of company and association representatives has developed the Roadmap.
• Internal and external experts, suppliers, the value chain, Commission, IEA, ENGO’s were consulted.
• We will now use this exploration to discuss and engage with stakeholders in the next months.
Exploration

- The CEPI 2050 Roadmap – the Forest Fibre Industry Roadmap to a low carbon bio-economy
- Is an exploration into the 2050 future.
- Within the framework of Commission modelling – global action scenario.
- Defining the policies needed to reach a carbon reduction by 2050, while staying profitable, and having the raw material to do so.
- It is the start of a debate – not the end.
The starting point – is this possible?

"As solutions are sector-specific, the Commission sees a need to develop specific roadmaps in cooperation with the sectors concerned".
-80% carbon – How?

The exploration shows that a reduction of 50 to 60% of CO₂ emissions is possible given the right circumstances. To achieve a minus 80% reduction, however, the sector will need breakthrough technologies.
In our technology assessment, the CO₂ reduction pathway to 2050 depends on **breakthrough technologies**. This is two investment cycles, or a maximum of two paper machines or boilers away. Breakthrough technologies have to become **available by 2030** to be on time for 2050.
Integration!

A system of integrated recycled and integrated virgin mills, balanced by non integrated mills. The final step – industrial symbiosis.
The challenge

50% more value, 80% less fossil CO2,
40 years from now
in a mature European market
in a broad sector scope
the forest fibre sector
Fold out the world – its different!
The ageing society
Population by age, sex and educational attainment

Educational attainment:
- Higher education
- Secondary education
- Some primary education
- No formal education
Long-term projection on paper and paperboard demand by region until 2050²

By % of global paper and board demand

By 1000 tonnes
2050
The Forest Fibre Industry has a strong presence in a mature EU market with an ageing population. The EU population will peak at 516 million around 2035, and the proportion of Europeans aged 65 and over will double from today’s figure. To succeed, the 2050 sector creates the highest possible value from its resources. The Forest Fibre Industry is uniquely placed to provide for this, if we invest now.
Value

The core strategy on the path to 2050 is to get the highest possible value from resources – wood, virgin and recycled wood fibres, and non-fibrous raw materials.
The forest fibre industry, drawing as it does largely on EU raw materials, will have a central role to play in the bio-economy, where the focus will be on sustainable, renewable and recyclable raw materials, used in the most optimal way, and creating the highest possible added value.
But only if

• We get the raw material needed.
• We have access to finance / investment
• We find the breakthrough technologies
• We remain competitive compared to our global competitors
So we propose

• Broadening of climate change policy with a technology approach.
• A forest fibre transformation partnership developing the breakthrough technologies of the future.
• In a stable and synchronised policy framework.
We explored

- Europe in 2050
- The future consumer and his/her demands
- The 2050 industry sector
- The pathway to 2050 decarbonisation
- The policy framework we would need
CEPI 2050 roadmap

More?

Joint the seminar tomorrow morning

www.unfoldthefuture.eu
The Enabling policies
This roadmap explores the potential for developing a high-value, low-carbon forest fibre industry by 2050. Earlier chapters have outlined the role of companies, consumers, researchers, markets, technologies and investments in realising this goal. Policymakers, too, will play a crucial role.

Climate policy = Industry policy
A sector specific policy package is needed
Climate policy = innovation policy
Raw material availability is crucial
Action must be global
All sectors will have to contribute
A Call to Policy-Makers

This roadmap is the start of a discussion about policies that the sector will need in order to develop as modelled. We call on the European Commission and member states to include in the next climate change and energy package, or in national or regional 2050 roadmaps, the following measures:

1. Sector specific industrial policy – a technology approach
2. Make ETS a double dividend system – spend the revenues!
3. EU forest fibre industry transformation partnership
4. Funds for demo and pilot plants in Horizon 2020
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5. Recycled materials policy. Landfill bans.
7. Policy push for substitution.
8. Biomass supply policy.
9. CAP reform to address biomass
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10. An integrated and balanced forest policy.
11. The 7th EAP to start with industrial symbiosis.
A low carbon economy............

A renewable and low-carbon solution that enables the bio-economy of the future.

Forest fibre.