

# ICFPA UPDATE 2014



INTERNATIONAL  
COUNCIL OF  
FOREST & PAPER  
ASSOCIATIONS

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### Annual Meeting

On June 11<sup>th</sup>, in St. Petersburg, Russia, members from ICFPA will be reunited during the 2014 ICFPA Annual Meeting to discuss its governance and activities. Other issues that will be addressed are the Extended Producer Responsibility (EPR), the EU 2030 Climate and Renewable Energy Package, and biotechnology.  
Be prepared!



## ICFPA'S ARTICLES

### ICFPA Forest Plantations Statement Updated

The ICFPA recently updated its statement on forest plantations, which outlines ICFPA support for, and advocacy of, the role of forest plantations for commercial purposes in providing sustainable raw materials for the growing demand for fuel, fibers and timber. The statement emphasizes ICFPA members' commitment to sustainable forest management and the sustainable production of forest products across a range of forest types and landscapes to meet the growing needs of society.

The updated statement is available here: <http://www.icfpa.org/uploads/Modules/Publications/icfpa-statement-on-forest-plantations.pdf>.

### ICFPA issues a press release for the International Day of Forests

In celebration of the International Day of Forests, on March 21, ICFPA issued a press release highlighting the global forest product industry's contribution to sustainable forest management and commitment to eradicating illegal logging, and referenced the recently updated statements on these issues. To reinforce the action its members released the text in their own countries. The press release is available here: <http://www.icfpa.org/mediaroom/37/23/Global-Forest-and-Paper-Industry-Celebrates-International-Day-of-Forests>.



### Forest Stewardship Council's Online Claims Platform



At its February meeting in Montreal, the ICFPA Steering Committee discussed a paper on forest certification-related issues prepared by the Confederation of European Paper Industries (CEPI). Among the issues identified in the paper

was the Forest Stewardship Council's (FSC) Online Claims Platform (OCP). According to the FSC, the purpose of the OCP is to improve the credibility of claims made through the FSC Chain-of-Custody standards. However, ICFPA Steering Committee members are concerned that implementing the OCP as outlined will not be a proportionate or justified way to ensure credibility of claims. Besides, it may add a large administrative burden for FSC certificate holders, and could potentially expose confidential business information.

Several ICFPA member associations have already expressed these concerns to FSC International in writing. The Steering Committee agreed to monitor OCP developments and identify opportunities where ICFPA intervention would be useful.

### New members of the ICFPA Steering Committee

The ICFPA Steering Committee was expanded late last year to include two new members: Jane Molony, Executive Director of the Paper Manufacturers Association of South Africa (PAMSA); and David Rhodes, CEO of the New Zealand Forest Owners Association (NZFOA).

The Steering Committee meets twice a year to follow up on ICFPA activities and discuss new opportunities. Jane Molony highlights that South's Africa entrance in the committee is important once it guarantees input from other southern hemisphere countries. "There is great strength in finding common ground in the midst of our diversity," she said.

For David Rhodes, the steering committee is important to ensure that a strategic focus is brought to the Annual Meeting. He explained that it is essential to ensure that the limited financial resources are applied most effectively: "The Steering Committee has an important role in ensuring this happens and communicating with the larger group," he said.

The Steering Committee members now are Donna Harman, ICFPA President and American Forest & Paper Association (AF&PA) President and CEO; Elizabeth de Carvalhaes, Brazilian Tree Industry (Ibá) CEO and executive president; Masataka Hayama, Japan Paper Association (JPA) President; David Lindsay, Forest Products Association of Canada (FPAC) President and CEO; Jane Molony, Paper Manufactures of South Africa (PAMSA) Executive Director; Teresa Presas, Confederation of European Paper Industries (CEPI) Director General; and David Rhodes, New Zealand Forest Owners Association (NZFOA) CEO.



## ICFPA at Interpack Trade Fair

On May 9<sup>th</sup>, the ICFPA participated in the special event International Coalition Bio-based Packaging: A Green Food Saver at the 2014 Interpack trade fair held in Düsseldorf, Germany. ICFPA partnered on the event with the United Nations Food and Agriculture Organisation (FAO) and the Technology Research Centre of Finland (VTT). [Check here](#) the press release issued on the ICFPA participation.



### POINT OF VIEW

#### Over the last 10 years...



Teresa Presas

At the end of May, after more than 10 years at the helm of CEPI, I will begin writing the next chapter of my life.

Looking back, I see a different forest-based industry worldwide. For one thing, the sector has become truly global. In whatever continent it operates, the forest-based industry faces many of the same challenges: scarcer raw material supply, its role in climate change, increased regulatory impact on the business, image and reputation of the sector, and declining economic growth. All those challenges might be elaborated in different terms, but they all affect the companies in the sector.

This is enough to put in evidence the value of the International Council of Forest and Paper Associations. ICFPA was global, “avant la lettre”. The ICFPA came into existence more than 10 years ago to be the worldwide platform of forest and paper industry associations to promote cooperation in areas of common interest and to represent the industry at the international level. Today, ICFPA members account for close to 90% of the

world’s paper production and 50% of wood production, in some 35 national and regional paper and forest associations. But it still takes the same time to memorize its acronym....

The signing of the CEOs Leadership Statement in 2006 by over 80 companies and associations was a key milestone for ICFPA members. Those global forest products industries committed to six sustainability principles, and to report on progress every two years.

That commitment was global, as sustainability is indeed embedded in the forest products industry as a natural input and output, called the fiber cycle. It all starts with sustainable forest management all the way through to paper recycling.

In that global world, development trends are also common. The industry is connected, and something happening in one corner of the globe will have repercussions in the sector around the planet.

For those reasons, international reach is a priority for CEPI. We held the leadership of ICFPA for six years, until June 2012. Globalization brought about increased competition from lower costs regions, while Europe produces one quarter of the world’s paper. CEPI members have kept their net exporter position, and their production value almost doubled in 20 years. The European pulp, paper and board industry has turned into a leading example of how competitiveness and sustainability can go hand in hand. We established networks within the value chain, in other industrial sectors and at a global scale. The learnings from that opening showed to be very crucial to our future.

During 10 years, I had the satisfaction of contributing to what industry associations are supposed to do, and that is to add value to the industry they service.

I take with me, for the next chapter, the value of working together for a shared vision.

And wish the global industry to evolve into the true model for the new bioeconomy, bringing about solutions to many of the problems facing our societies.

*Teresa Presas is the Director General of Confederation of European Paper Industries (CEPI).*



AMERICA'S CORNER

## Brazil – Brazilian Tree Industry – Ibá

### 70 companies launch the Brazilian Tree Industry (Ibá)



brazilian tree industry

Seventy companies from four associations, including the Brazilian Pulp and Paper Association (Bracelpa), have just created the Brazilian Tree Industry (Ibá) with the aim of creating a new sector, whose main vector of production and social, economic and environmental development are planted trees. The new association will seek to increase the competitiveness of products obtained from planted eucalyptus and pinus and other species, which are planted for industrial purposes, with special mention to wood panels, laminate flooring, pulp, paper, biomass for energy production, as well as independent producers of planted forests and institutional investors.

The new association brings together 7.2 million hectares of planted trees that occupy less than 1% of Brazilian territory. Of this total, approximately 50% of plantations are certified, thus guaranteeing the sustainability of and good practices in the industry.

According to Elizabeth de Carvalhaes, who was Bracelpa CEO and has just assumed the same position at Ibá, while giving the forestry base higher relevance, the association will aim at making Brazil the global benchmark in planted trees. “They will become more and more relevant as result of the growth of the world population, which in 2050 will reach nine billion people, and they will replace fossil materials for renewable and recyclable products”, she adds.

Besides Bracelpa, Ibá represents now the member-companies of the Brazilian Association of the Wood-Panels Industry (Abipa), the Brazilian Association of the Manufacturers of Laminate Flooring (Abiplar) and the Brazilian Association of Forest Plantation Producers (Abraf).

Read more about Ibá at <http://www.iba.org>.

## United States – American Forest & Paper Association – AF&PA

### Campaign promotes paper products

The U.S. Department of Agriculture (USDA) recently established the *Paper Check-off*, a 7-year program that creates a promotion and research effort for the purpose of maintaining and expanding markets for paper and paper-based packaging. This is a consumer focused product promotion campaign designed to promote this paper category by informing consumers about the functionality and sustainability of paper products.

Domestic producers and importers of 100,000 short tons or more of paper and paper-based packaging will fund the program through a mandatory assessment. Producers and importers will pay \$0.35 per short ton of printing and writing paper, containerboard, paperboard and kraft paper. Newsprint, carbonless and tissue ▶







▶ paper, as well as most converted products are not included. The program's assessment provisions became effective on March 1<sup>st</sup>.

The USDA conducted a referendum late last year of eligible manufacturers and importers. Eighty-five percent of those voting in the referendum representing 95% of the volume of paper and paper-based packaging in the referendum voted in favor of implementing the program. A 12-person Paper Check-off Board has been appointed by the Secretary of Agriculture to oversee the program and is in the process of establishing the administrative and program structure. For more information, visit [www.papercheckoff.com](http://www.papercheckoff.com).

## Successful Paper2014 Meeting in New York City



*Industry leaders Exchange thoughts about its future*

The AF&PA and the National Paper Trade Association co-hosted the Paper2014 Meeting, held from March 23<sup>rd</sup> – 25<sup>th</sup>, in New York City. The event's theme “*Exchange Expand Experience*,” provided a forum for participants to exchange ideas, expand their knowledge, and to network. The Industry Leadership Session featured a distinguished panel of industry CEOs who provided their unique perspectives on issues of importance to the paper industry. Luncheon keynote speaker Alex Sheen, founder of *Because I Said I Would*, captured the audience's attention with his rapidly growing social movement that demonstrates the power of promises, delivered on paper.

Next year's event, Paper2015, will take place March 15-17, 2015 in Chicago.

## ASIA'S CORNER

### Japan – Japan Paper Association - JPA

#### JPA launches a campaign to promote paper

In order to take advantage of the Valentine season, JPA launched in February the “*Write a letter and tell your loved ones how you feel*” campaign. The campaign aimed to get people who are now used to communicating through digital tools such as emails to discover how wonderful and effective it is to express their feelings by writing a letter.

To encourage people to write a letter and with the cooperation of hundreds of bookstores and restaurants, JPA distributed 100,000 sets of stationary and envelopes.



#### Workshop on Paper Recycling System



*Industry players from Malaysia, Thailand and Vietnam attended the workshop*

JPA hosted a workshop on paper recycling system in late December, gathering industry players from Malaysia, Thailand and Vietnam. With the support of the Ministry of Economy, Trade and Industry (METI) and The Overseas Human Resources and Industry Development Association (HIDA), the event involved lectures about the history of paper recycling in Japan, improving efforts for paper recycling by paper manufacturers, recovered paper collectors/distributors and governments, related laws and regulations, and paper mill visits.

The workshop, which has been held annually since 2009, is based on the agreement made at the 1<sup>st</sup> Asian Forest Products Industry Conference held in Osaka, Japan, in 2008. The agreement sets forth that JPA will cooperate with Asian colleagues to improve paper recovery rate in the region in order to improve the balance of supply and demand of recovered paper in Asia.



## EUROPE'S CORNER

### EU – Confederation of European Paper Industries – CEPI

#### CEPI announces its new Chairman: Gary McGann

CEPI announced the appointment of Gary McGann as its new Chairman. Mr McGann is Group CEO of Smurfit Kappa. He took on the position as Chairman of CEPI on January 1<sup>st</sup>, 2014, succeeding outgoing chairman Mr Jussi Pesonen.

Gary McGann was appointed CEO of Smurfit Kappa in November 2002. Mr. McGann is also the Chairman of Aon Ireland, a director at Irish Business and Employers' Confederation (IBEC), a director at UCD Michael Smurfit Graduate Business School and a member of the European Round Table of Industrialists (ERT). Mr. McGann joined the (then) Jefferson Smurfit Group in 1998 as Chief Financial Officer and holds a Master's Degree in Management Science.



Gary McGann

#### European Paper Week video wins Applied Arts Design Awards 2013

The teaser video made for European Paper Week won the first prize in the Motion Design category of the Canadian magazine AppliedArts! [Click here](#) to watch the teaser.

The 2014 European Paper Week already has a date and place: November 25<sup>th</sup>-27<sup>th</sup>, in Belgium. Save the date!

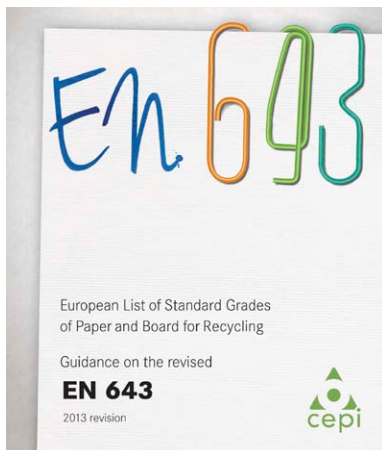
#### Landfill and incineration restriction for recyclable paper

As part of the Waste Target review, the paper industry proposes an EU-wide ban on landfilling/incineration of recyclable paper by 2020. Current EU paper recycling performance could increase by 10 million tons of paper and board if diverted from landfilling and incineration. In theory, this incremental volume could result in a paper recycling rate of about 80% (71.7% was achieved in 2012).

The policy context in the EU supports the notion of diverting recyclable materials from landfilling and incineration to recycling. However, without a legal requirement, local authorities do not always make recycling a priority for these areas. The paper industry is committed to supporting them in doing so.

CEPI believes that recyclable paper presents a source of material for which the above milestone can be realistically met by 2020 at the latest. A specific ban on landfilling/incineration of recyclable paper could mark the first concrete step towards the elimination of incineration/landfilling of all recyclable materials by 2020 or at a later date where appropriate.

See the full position paper [here](#).



#### The new EN643

CEPI launched a guidance document that details the changes in the revised EN643 to give sellers and buyers advice on paper for recycling. CEPI advises all organizations and individuals involved in trade with paper and board for recycling to implement and use the updated standard.

The EN643 is the European List of Standard Grades of Paper and Board for Recycling. It was revised in 2013 and now includes several major improvements, including a grade-specific tolerance level for non-paper components and more detailed descriptions per grade.

The guide is available in English, French and Portuguese and can be viewed at [www.cepi.org/en643](http://www.cepi.org/en643).



## EU-US TTIP negotiations CEPI-AF&PA joint statement

The American Forest & Paper Association (AF&PA) and CEPI have published a joint statement on the EU-US Transatlantic Trade and Investment Partnership (TTIP). Since AF&PA, CEPI and their members are strong proponents of free but fair trade, they support the objectives of TTIP negotiations aimed at eliminating barriers to trade, including regulatory barriers. The further reduction or elimination of trade barriers will strengthen the economies of the U.S. and the EU and enhance their global competitiveness.

The document states that the EU and the U.S. paper industries will work to reach agreement on specific proposals through a constructive sectoral dialogue. In addition, CEPI and the AF&PA believe that, beyond the agreement, the TTIP should remain a dynamic, 'live' agreement with sufficient flexibility to incorporate new areas and issues over time.

The full joint statement is available at <http://www.cepi.org/taxonomy/term/25>.

## Finland – Finish Forest Industries – FFIF

### Industry's challenges

The Finnish paper industry's situation continued to pose a challenge in 2013 due to the weak economic situation in Europe and the declining demand for graphic papers.

In 2013, a total of 10.6 million tons of paper and paperboard were produced, 1% less than in 2012. Production of graphic papers – printing and writing paper as well as newsprint – totaled 6.3 million tons, reduction of almost 5% from 2012 levels.

Production of paperboard grades designed for packaging amounted to 2.9 million tons, almost 7% more than in 2012. Pulp production totalled 7.1 million tons, almost 4% more than in the previous year.

The wood products industry's production volume totalled 10.1 million m<sup>3</sup>, which represents a 7% increase from the previous year. Exports to countries outside Europe increased, especially to Asia, the Middle East and North Africa.

## Germany – German Pulp and Paper Association – VDP

### VDP concerned about OCP



The German Pulp and Paper industry is concerned about the plans of the Forest Stewardship Council (FSC) to implement its so-called Online Claims Platform (OCP). This data platform would force FSC-certified companies to reveal sensitive internal data, e.g. supplier and customer relations, to FSC and raises many questions of technical, legal, and data security.

Despite the fact that FSC calls its current testing period "open-ended", it seems to be decided that in the beginning of 2015 the OCP will become mandatory in all FSC-certified companies worldwide. By doing this, FSC jeopardizes the chain-of-custody by forcing companies into a decision of either to keep the FCS-certificate or maintain sovereignty over sensitive and market relevant data.

VDP is currently trying to define a common position of the industry regarding the OCP plans and wants to open a dialog with FSC on this issue.

## Spain – Spanish Association of Pulp and Paper Manufacturers – ASPAPEL

### Spanish consumers have the right to paper bills

The Spanish Parliament recently passed a new law giving consumers the right to receive paper bills at no additional cost. It also requires the consumer's specific consent to issue electronic invoices. The new law came into force on March 29<sup>th</sup>. ▶



► In recent years, numerous Spanish utilities in the telecom, energy and other sectors have unilaterally switched consumers from paper to electronic billing. Others impose surcharges on customers wanting to receive printed bills. Under the new regulation, these practices are now illegal.

## Paper takes off with technology



The FORO DE PAPEL, which includes all the associations that make up the entire paper value chain in Spain, hosted the BIOINNOVPAPER event in Madrid, on April 1<sup>st</sup>. The event was attended by 400 people and presented several bio-trends in paper innovation, such as water-free paper production, low-temperature pulp manufacturing, paper architecture with cardboard stands, printed panels that talk, among others.

The event featured four panels to discuss the present and the future role of the companies and products chain. One of them was organized to discuss the results of the TWO TEAM Pan-European project by the Confederation of European Paper Industries (CEPI).

During the event, surprising applications that have become a part of reality were presented: electronic printing that puts an end to the paper versus digital debate, enhanced reality as the best example of compatibility between printed paper and the digital world, smart and bio-efficient paper and cardboard packaging as a more sustainable, functional option. In short, paper was presented as a material for the future in continuous innovation.

More information is available here: [http://www.aspapel.es/sites/default/files/publicaciones/bioinnovpaper\\_aspapel.pdf](http://www.aspapel.es/sites/default/files/publicaciones/bioinnovpaper_aspapel.pdf).

## Paper: myth and facts

ASPAPEL released the fifth edition of its publication *El Papel, mitos frente a datos*. Since the first issue in 2008, more than 30,000 copies of this educational publication, which contains data checked against external sources that dispels the many myths that exist about paper, have been printed and distributed. The new version is available at [http://www.aspapel.es/sites/default/files/publicaciones/doc\\_305.pdf](http://www.aspapel.es/sites/default/files/publicaciones/doc_305.pdf).



## RUSSIA – Russian Association of Pulp and Paper Organizations and Enterprises – RAO BUMPROM

### Annual Outlook

The RAO BUMPROM released its “*Outlook of Russian Pulp and Paper Industry*” publication, which gathers information about the Russian pulp and paper industry in order to determine the main directions of activity for its members, and to bridge the gap between Russian enterprises and governmental institutes aiming at the harmonization and development of the industry in the global economy.

The publication is distributed among the CEOs of its members and government officials. An English version of the publication will also be distributed to ICFPA members at the upcoming ICFPA Annual Meeting in St. Petersburg in June.





**SOUTH AFRICA'S CORNER**

**South Africa – The Paper Manufacturers Association of South Africa – PAMSA Partnership sows seeds of success**



*Students take examination at the Mpac's Felixton mill*

The South African pulp and paper industry has been working with the Fibre Processing and Manufacturing (FP&M) Sector Education Training Authority (Seta) and a number of Further Education and Training (FET) colleges to provide education for full-time employees who wanted to further their studies in the pulp and paper field.

Seeing an opportunity, PAMSA, the FP&M Seta and the Umfolozi FET College joined forces to put together the Pulp and Paper Occupational Programme (PPOP) with updated material and improved content based on input from industry members.

The PPOP is a distance education course that offers four subjects per level: pulp and paper technology; mathematics; work orientation; and plant operations. Launched in 2013, there has been a remarkable uptake from the industry with employee registrations increasing even more each semester.

This program allows students to take their examinations at the mills, now accredited as exam centers. Lecturers also make time available to visit the mills to tutor and guide students. Such developments seek to lessen the load on the industry while also keeping travelling costs at a minimum.

**Pyrolysis shows the way for the fuel of the future**

The pyrolysis of biomass residues has the potential to provide as much as half of South Africa's gasoline needs. Approximately half of the biomass residues available in the country can be obtained from agricultural products, such as corn cobs and stalks, and the remainder can be obtained from residues of the timber plantations of the pulp and paper industry in the form of bark, sawdust and woodchips. These residues are presently underutilized, and are of interest as a renewable energy source.

In order to take advantage of these residues, Professor Mike Heydenrych of the Department of Chemical Engineering at the University of Pretoria has developed a novel fluidized bed pyrolysis device. Its patents have been filed in six countries around the world.

The project was recently assessed by South Africa's National Research Foundation (NRF) and was one of a select number approved for the Technology and Human Resources for Industry Programme (THRIP) funding at the university.

The project scored well because, in addition to making contributions to the Department of Trade and Industry's growth sector of biotechnology (biofuels), it demonstrates environmental benefits by being a carbon-negative process and presents job creation potential.



Sappi, South Africa

*Biomass residues are underutilised and demonstrate potential as a renewable energy source*



## Calendar



### 22<sup>nd</sup> Committee on Forestry (COFO) Food and Agriculture Organization of the United Nations (FAO)

June 23<sup>rd</sup> to 27<sup>th</sup>, 2014

Rome, Italy

<http://www.fao.org/forestry/57758/en/>

### PulPaper 2014

June 3<sup>rd</sup> to 5<sup>th</sup>, 2014

Helsinki, Finland

<http://www.pulpaperevent.com>

### 55<sup>th</sup> Session of the FAO Advisory Committee on Sustainable Forest- based Industries

June 10<sup>th</sup>

St. Petersburg, Russia

<http://www.fao.org/forestry/industries/9530/en/>

### FSC General Assembly

September 7<sup>th</sup> to 14<sup>th</sup>, 2014

Sevilla, Spain

<https://ic.fsc.org/events.331.412.htm>

### PEFC General Assembly

November 17<sup>th</sup> to 21<sup>st</sup>, 2014

Paris, France

[http://www.pefc.org/about-pefc/governance/  
general-assembly](http://www.pefc.org/about-pefc/governance/general-assembly)

Please send your event details to [info@icfpa.org](mailto:info@icfpa.org)

## Be Prepared!

### PAP-FOR

October 28<sup>th</sup> to 30<sup>th</sup>, 2014

St. Petersburg, Russia

<http://www.papfor.com/en/Home/>

### European Paper Week

November 25<sup>th</sup> to 27<sup>th</sup>

Brussels, Belgium

<http://www.cepi.org/EPW>

Please send your event details to [info@icfpa.org](mailto:info@icfpa.org)

# ICFPA UPDATE 2014



INTERNATIONAL  
COUNCIL OF  
FOREST & PAPER  
ASSOCIATIONS

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## ICFPA - International Council of Forest and Paper Industries

The ICFPA is a worldwide network of forest and paper industry associations that promotes cooperation in areas of common interest to its members and serves as the industry's advocate at the international level.

### Email

[info@icfpa.org](mailto:info@icfpa.org)

### Web

[www.icfpa.org](http://www.icfpa.org)

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Paper is  
precious natural  
innovative essential  
natural renewable precious  
essential innovative  
natural essential  
innovative precious  
renewable

