

Pulp and Paper

- Timber Committee forecasts by Prof. **Eduard Akim**, Manager, Canada Wood
- Expert presentation by Mr. **Paul-Antoine Lacour**, AFOCEL, France



UNECE TIMBER COMMITTEE
Market Discussions, 27 – 28 September 2005



Highlights of Forest Products Market Review, 2004-2005 (1-3)

- In Europe, production of paper and paperboard increased 4.1% in 2004 to a record 103.1 million m.t., in response to growth in GDP and exports, while pulp output rose 2.4%.
- In North America, production of paper and paperboard increased 3.3% in 2004 to 104.2 million m.t., with a robust increase of 4.1% in the United States and 2.3% in Canada.
- In the CIS, production of paper and paperboard increased 6.6% in 2004 to 8.0 million m.t., while paper and paperboard consumption increased 6.5%.



Highlights of Forest Products Market Review, 2004-2005 (4-6)

- The annual growth in apparent consumption of paper and paperboard within the CIS halved between 2003 and 2004, while in North America, growth rebounded over the same period.
- Net exports of paper and paperboard from Europe increased by 34.3% in 2004 to 12.1 million m.t., as exports to Asia rose substantially.
- In Europe, policy issues are related to industry competitiveness, simplification of EU legislation on chemicals and dramatic energy price increases.



Highlights of Forest Products Market Review, 2004-2005 (7-9)

- In the United States, a decline in the exchange value of the US dollar in 2003 to 2004, as well as labour productivity gains, helped restore industry competitiveness and profitability.
- Growth rates for US industrial production and advertising expenditures, key determinants of demand in US for paper and paperboard, appear to be lower in 2005 than in 2004.

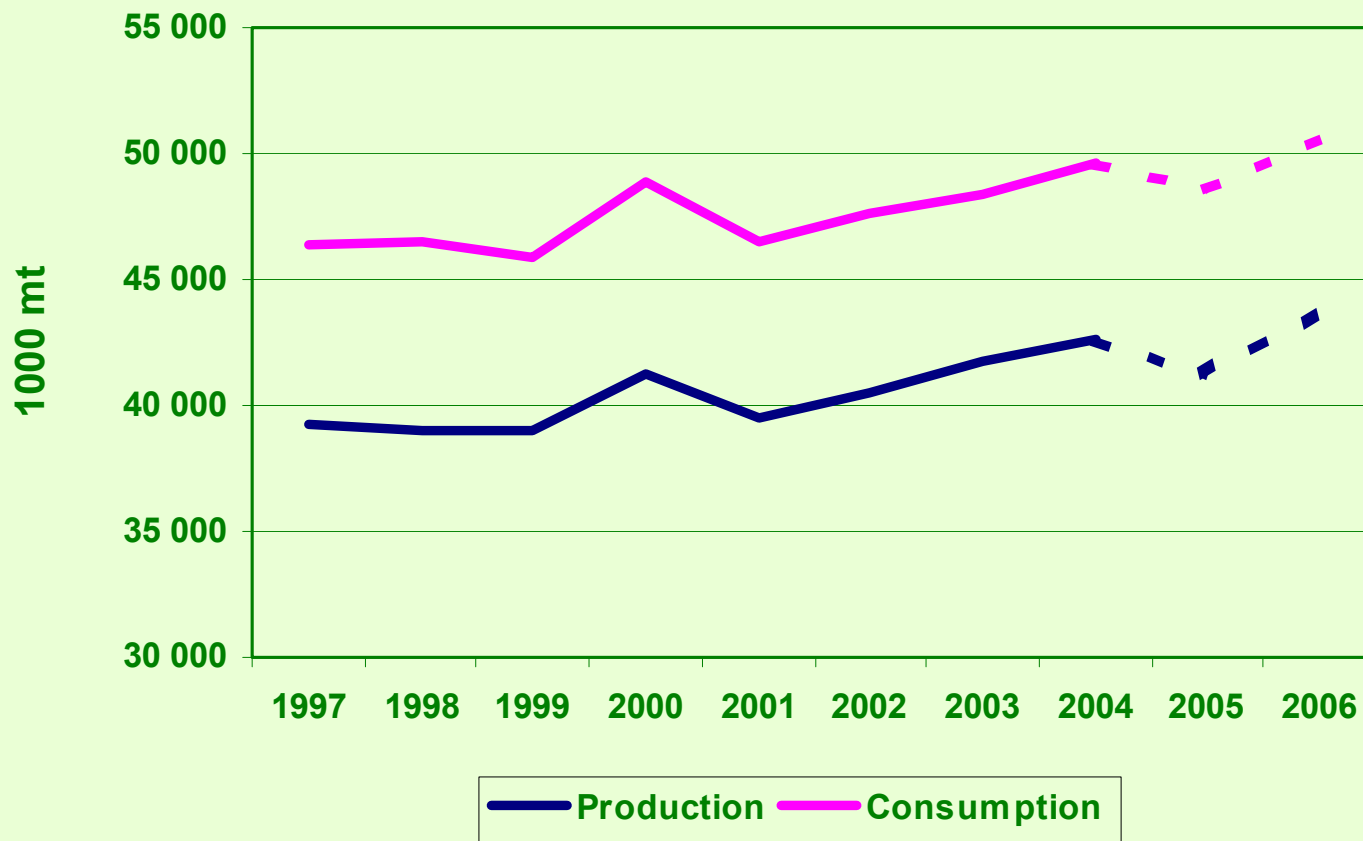


Highlights of Forest Products Market Review, 2004-2005 (10-11)

- A labour strike and lockout halted paper production in Finland for more than six weeks in mid-2005, impacting world markets for products such as coated paper, and creating opportunities for competitors to fill the void.
- In the CIS, ratification of the Kyoto Protocol by Russia was an important policy development that is fostering industry accountability for greenhouse gas emissions.



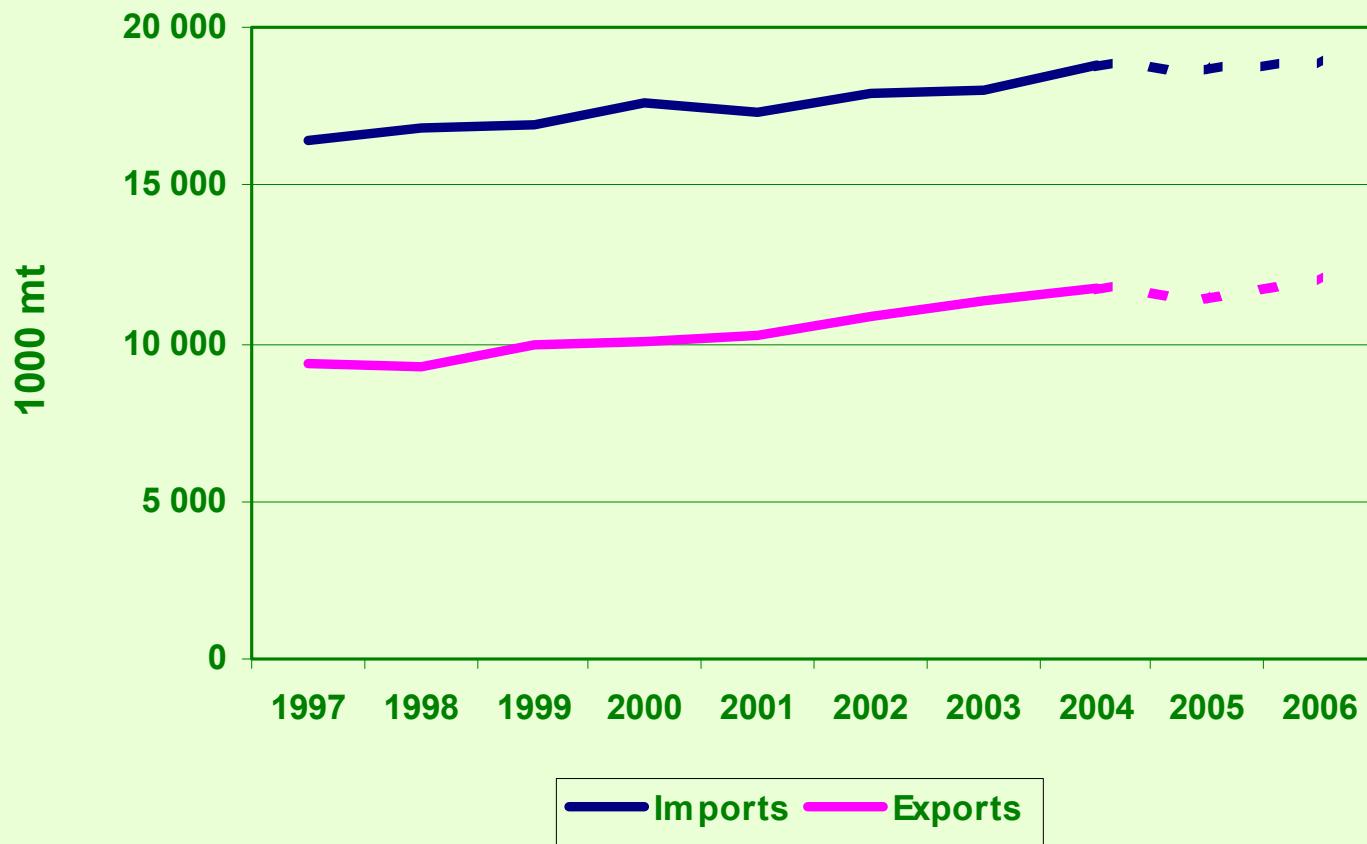
Wood pulp - Europe



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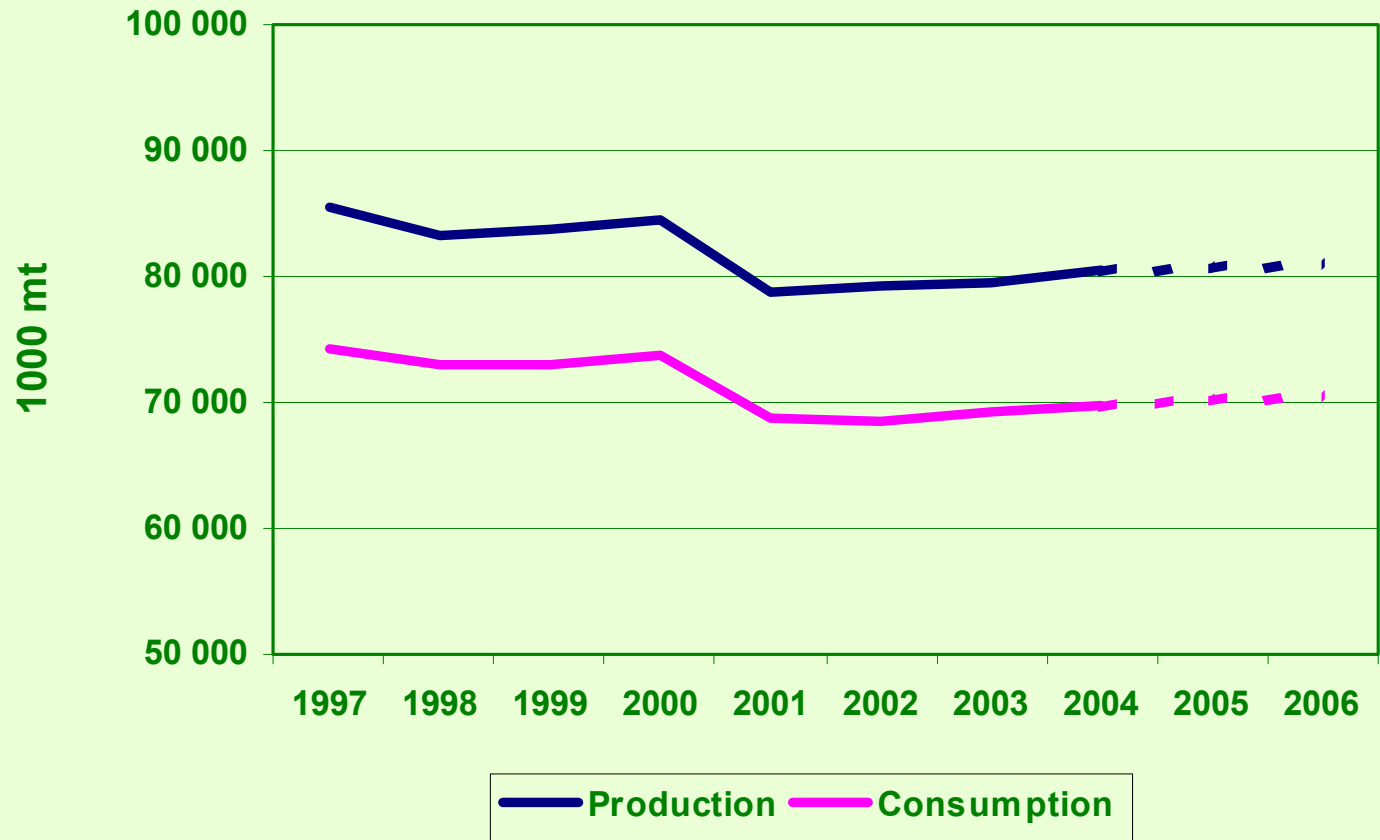
Wood pulp - Europe



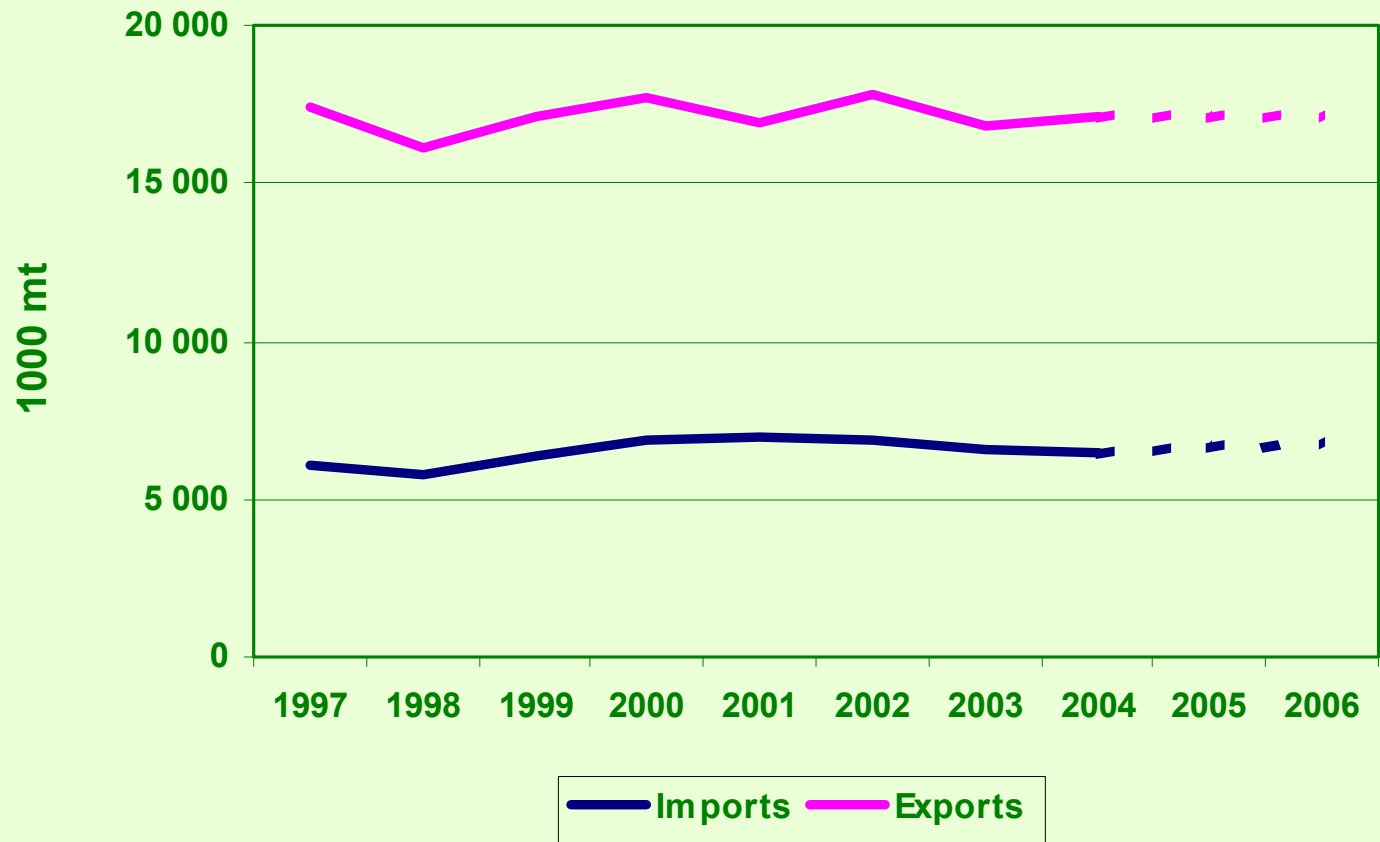
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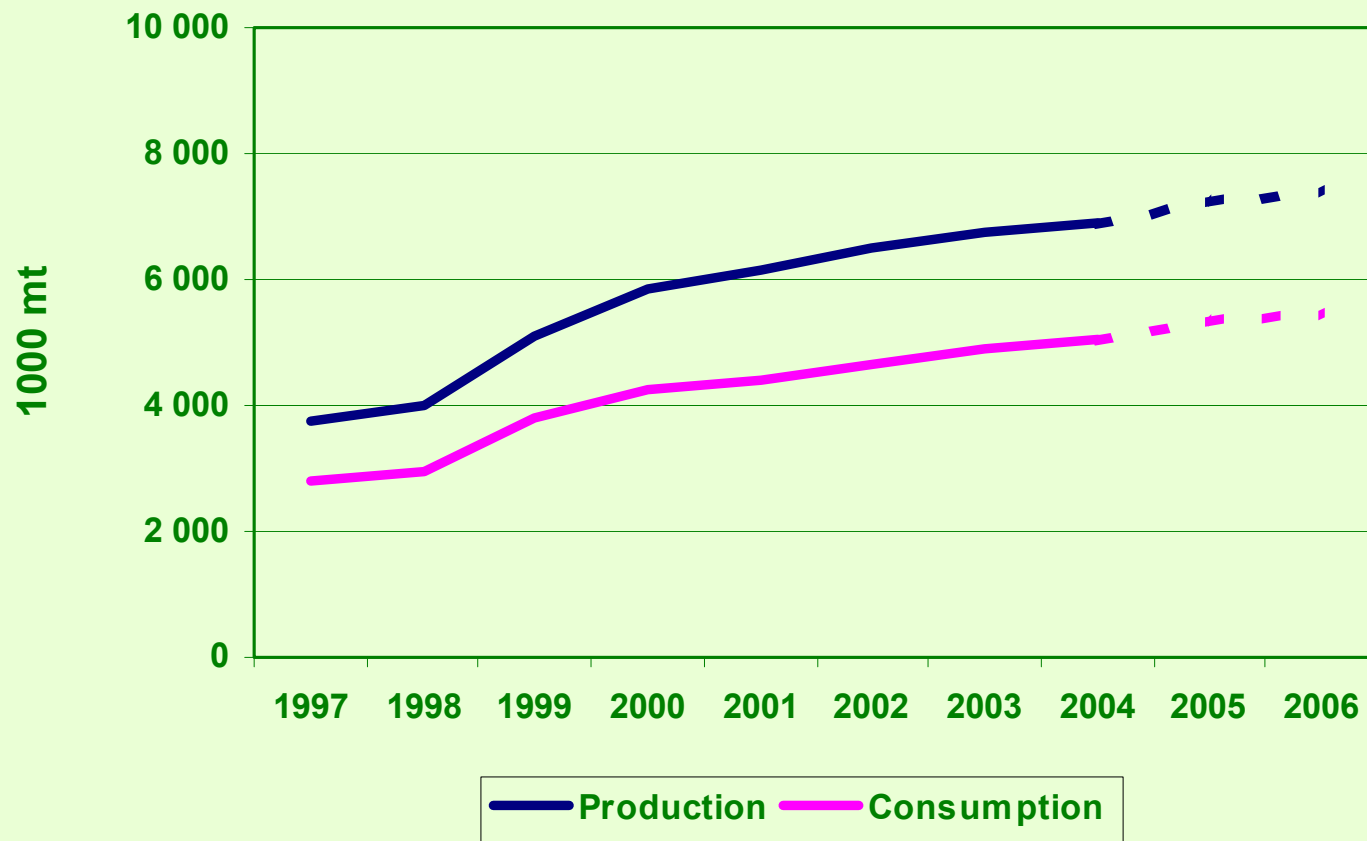
Wood pulp – North America



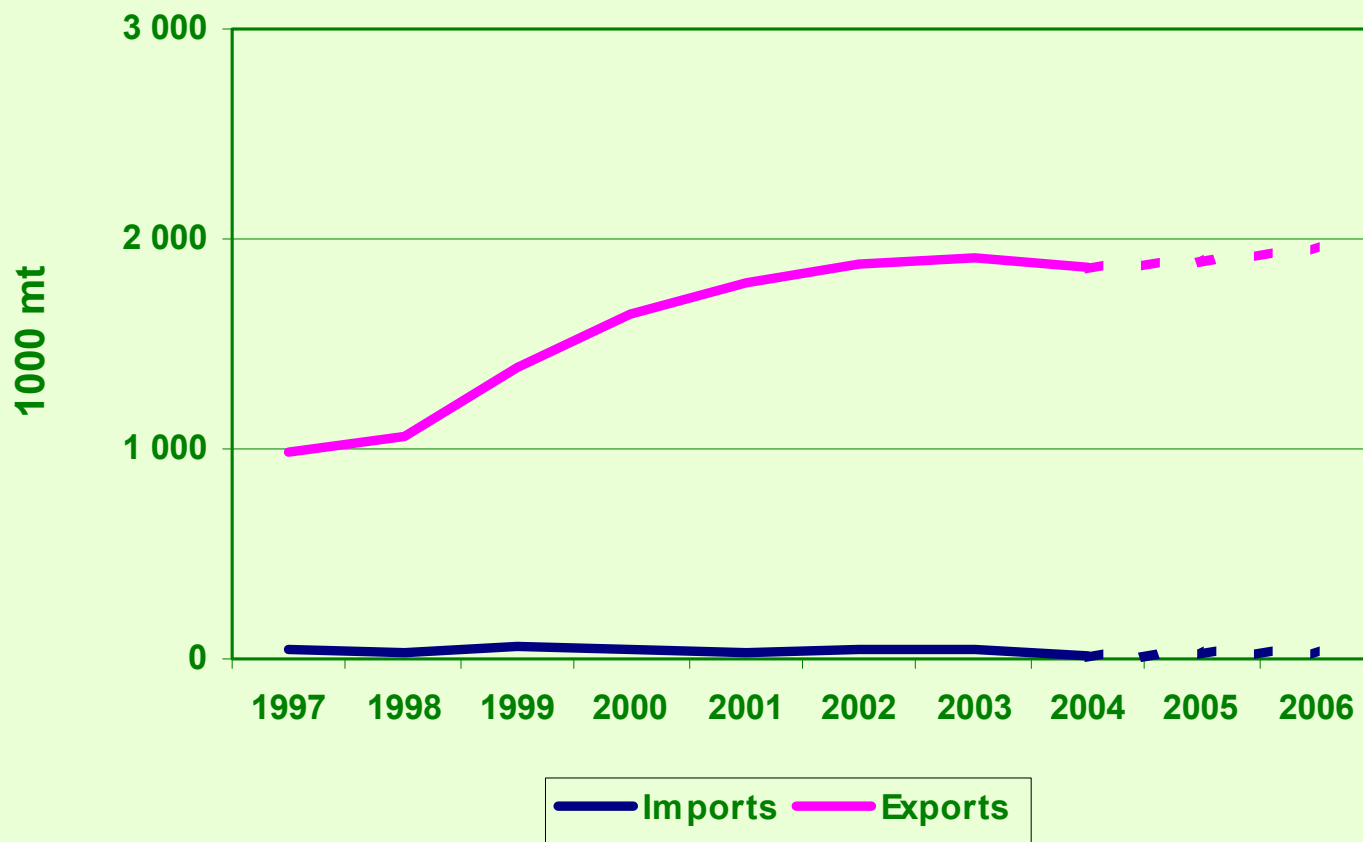
Wood pulp – North America



Wood pulp – Russian Federation



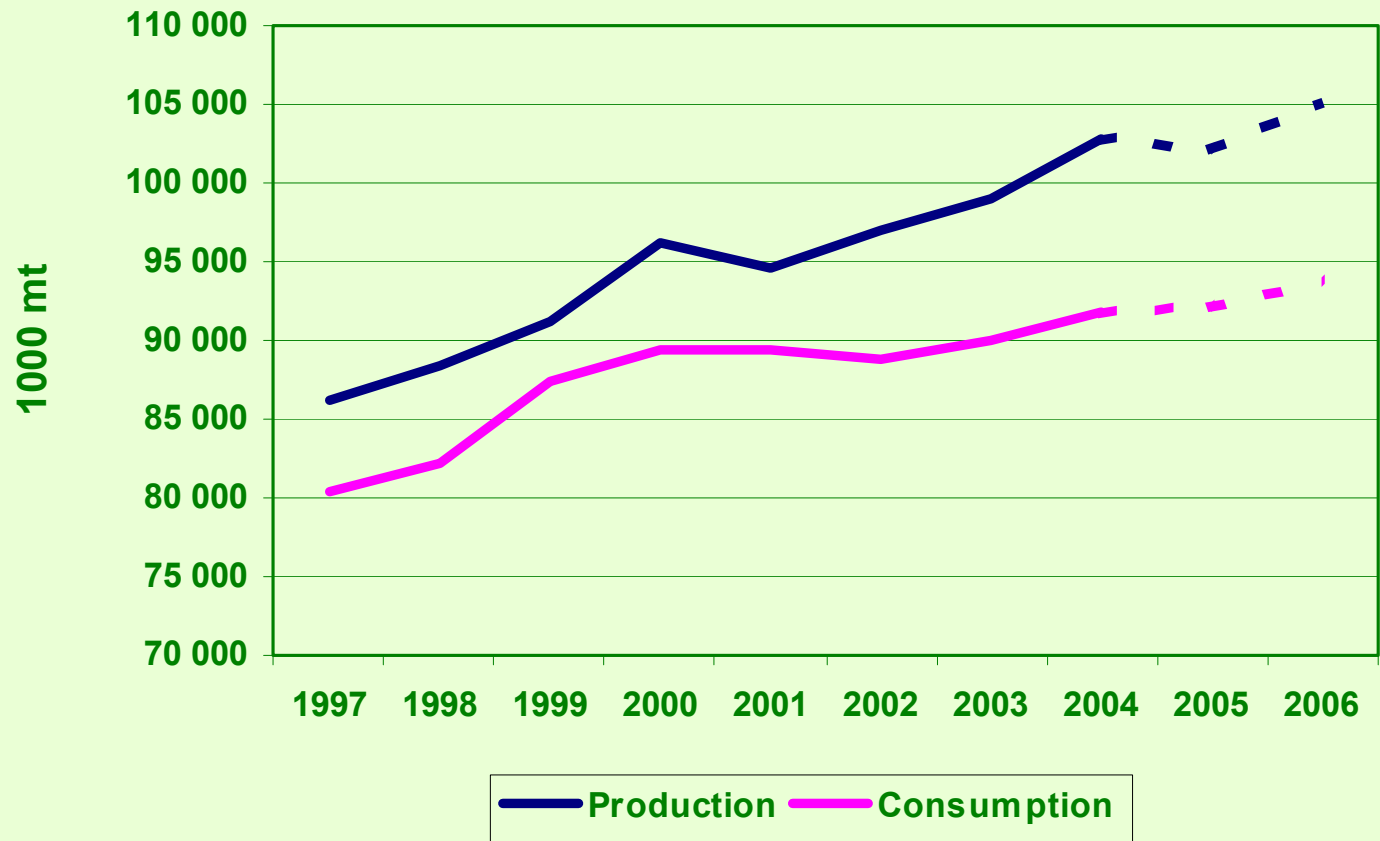
Wood pulp – Russian Federation



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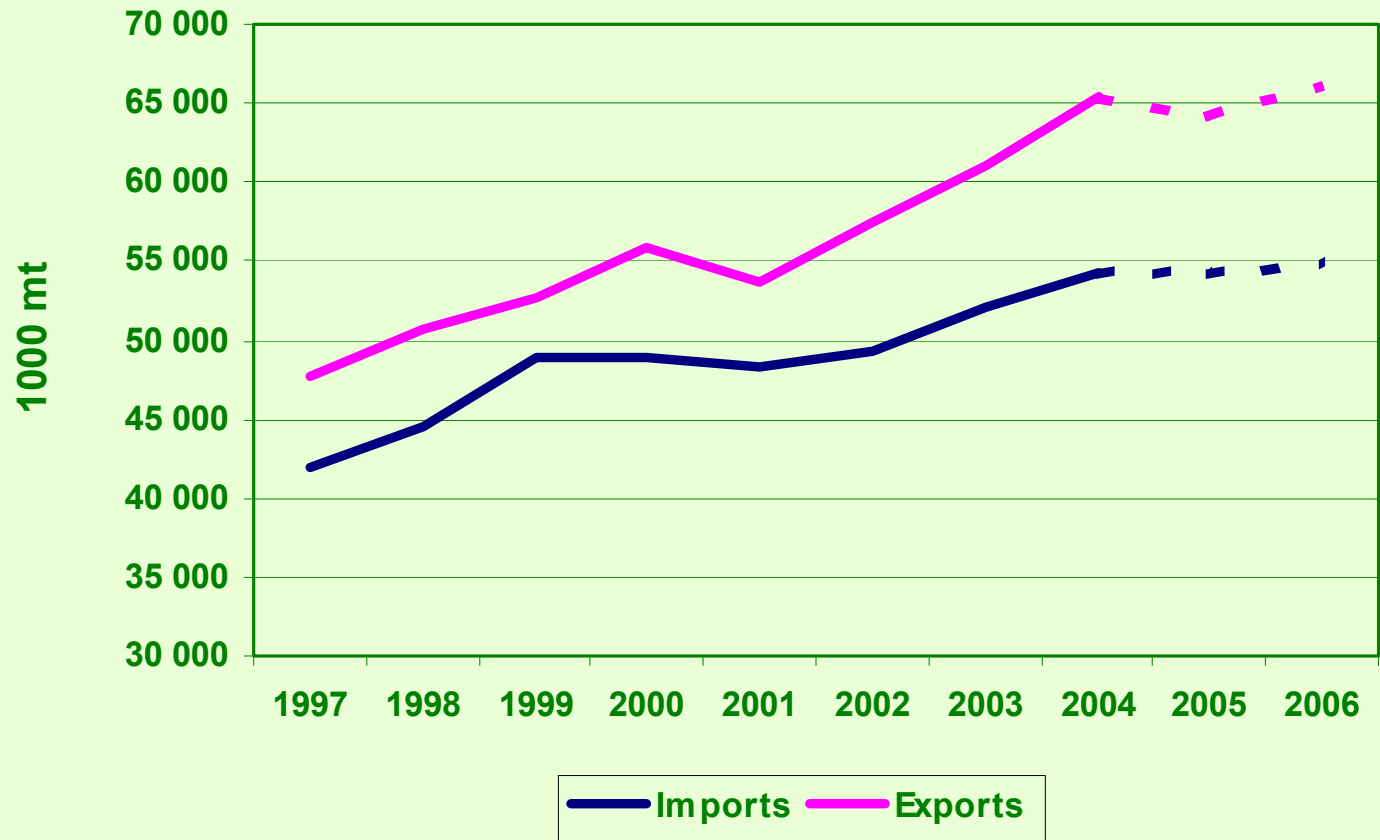
Paper and Paperboard - Europe



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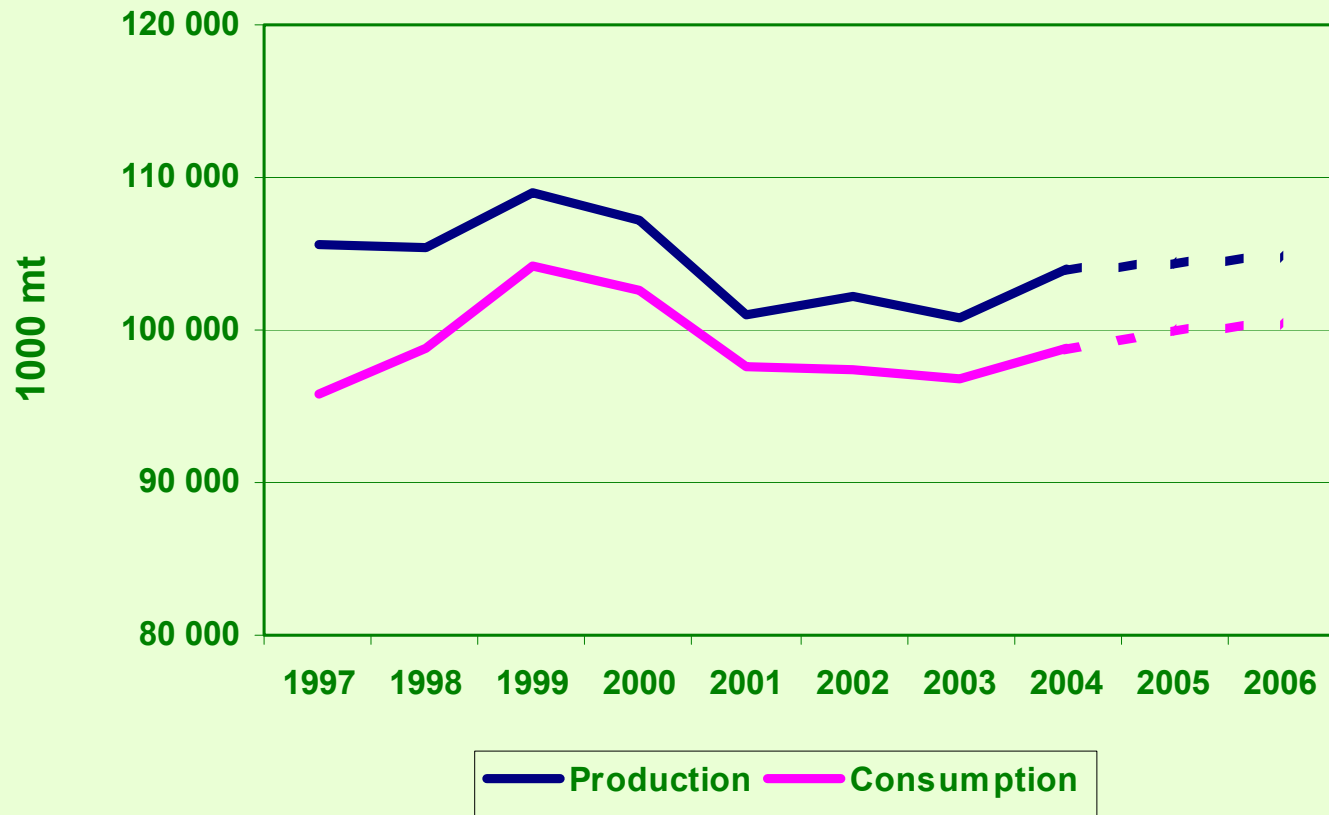
Paper and Paperboard - Europe



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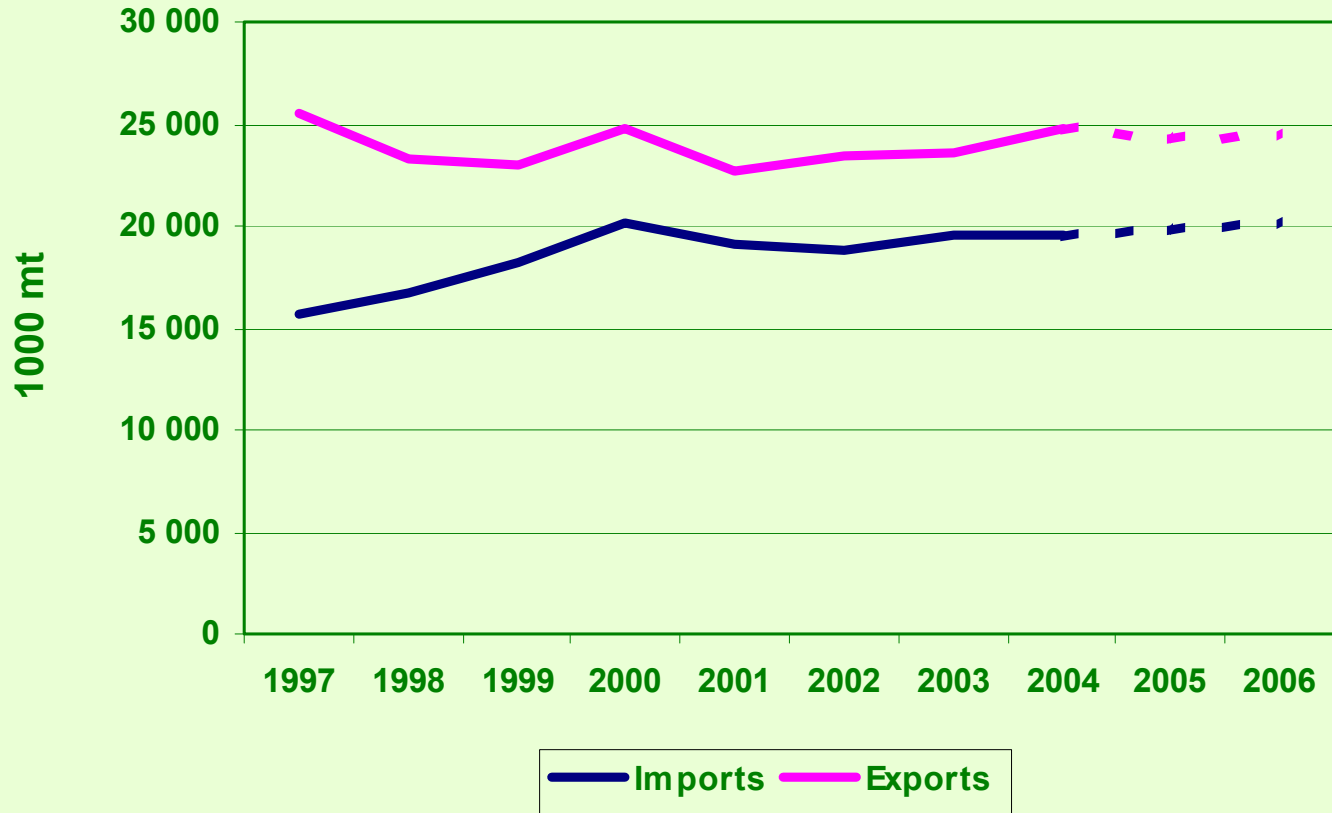
Paper and Paperboard – North America



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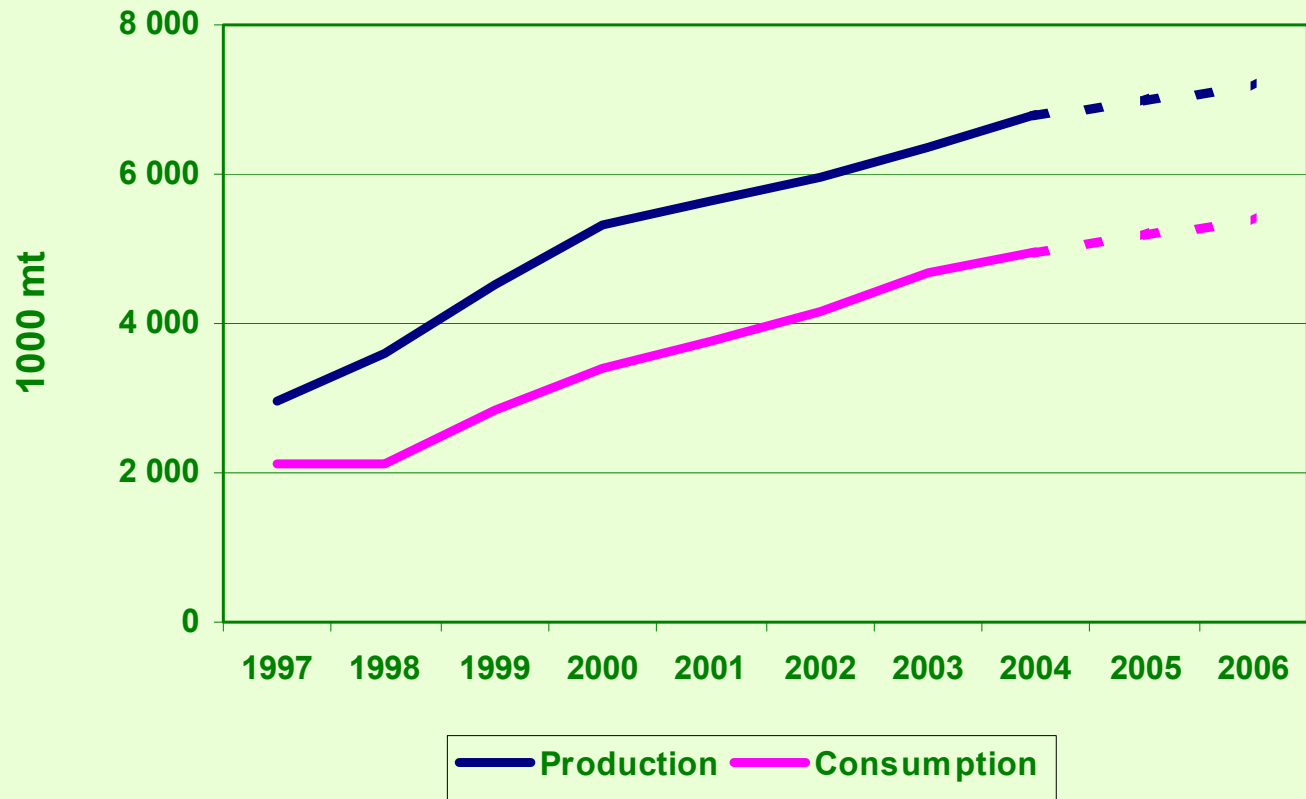
Paper and Paperboard – North America



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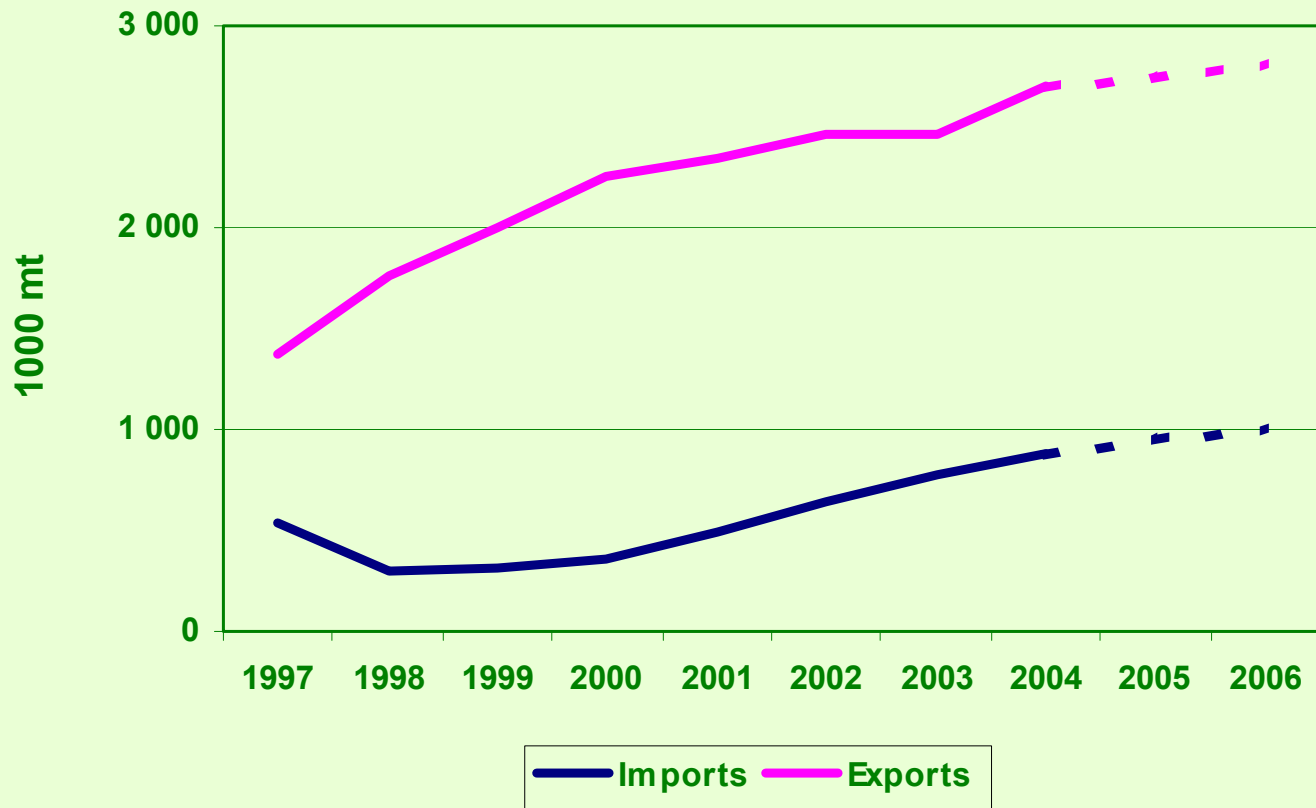
Paper and Paperboard – Russian Federation



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Paper and Paperboard – Russian Federation



Next Presentation

- Pulp and Paper Markets in Europe by Mr. **Paul-Antoine Lacour**, AFOCEL – Laboratoire Economie et Compétitivité, France



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