

DYNAMICS IN THE EUROPEAN PAPER AND BOARD SECTOR AND IT'S REGIONAL DIFFERENCES

A case study comparing
a Western European country (The Netherlands)
and a Central European country (Poland)

**A study performed in conjunction between
Poland and Dutch partners**

**Dominika Gajda and Bartosz Mamcarz
[Poland]**

**Jobien Lourijssen and Arie Hooimeijer
[the Netherlands]**

**Presentation by Dominika Gajda,
PhD student Anthropology of the
University of Lodz, Poland**

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PART I

In the European Paper and Board Industry, we have seen fast changes over the years, for example:

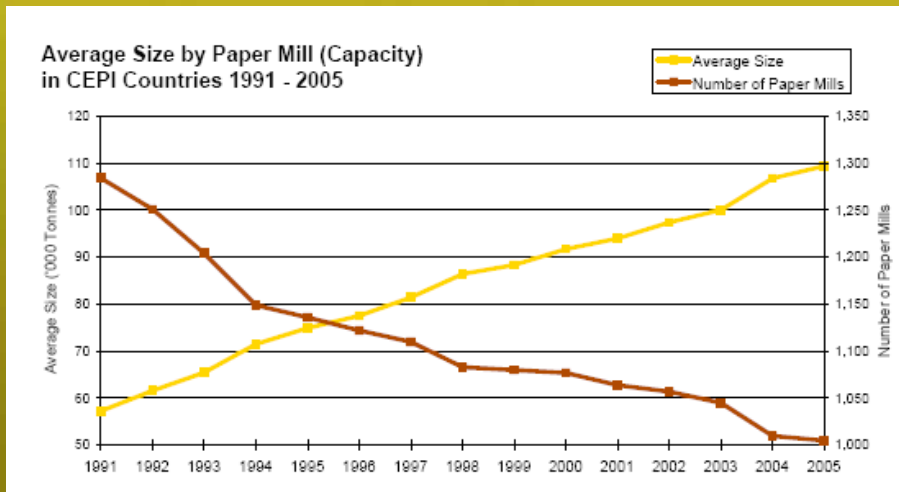
-changes in paper mills e.g.

- size / capacity

- technologies

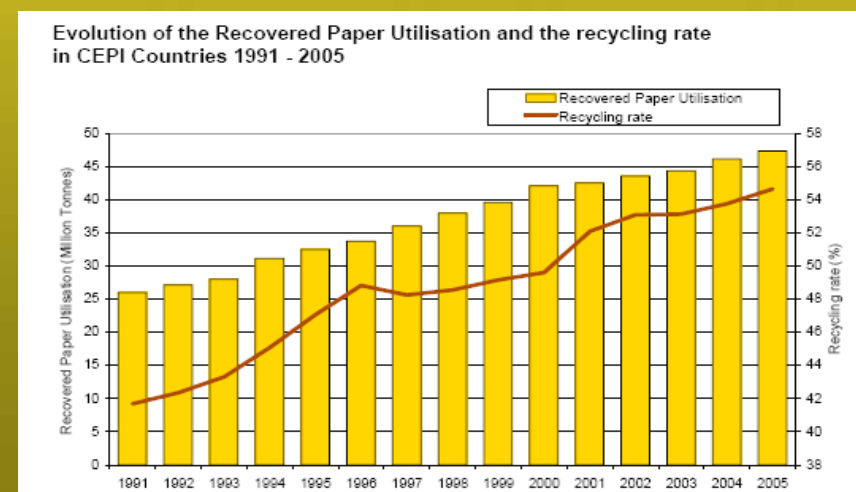
-modifications in the type and availability of raw material

-variations in the demand (amount and type) of products



The number of mills decreased from 1991-2005 with about 20% while the average mills' capacities have almost doubled.

Source: CEPI statistics 2005



From 1991 to 2005, the recycling rate has increased from less than 10% to over 54%.

Country	1990	2005
Luxembourg	33.268	80.080
Norway	27.764	65.509
Iceland	24.945	53.623
Switzerland	35.095	50.387
Ireland	13.635	48.604
Denmark	26.519	47.906
Sweden	28.345	39.658
Netherlands	20.042	38.618
Finland	28.042	37.320
Austria	21.542	37.086
United Kingdom	17.404	37.042
Belgium	19.824	35.461
France	21.414	33.925
Germany	19.593	33.865
Italy	20.029	30.525
Spain	13.381	25.997
Portugal	7.691	17.598

Country	1990	2005
Switzerland	82,5	104,3
Finland	82,7	107,1
United Kingdom	76,8	107,4
Germany	79,9	108,3
Sweden	77,0	109,1
Norway	79,4	109,1
Austria	81,8	109,7
Denmark	80,9	110,2
Belgium	81,9	110,3
France	84,1	110,5
Luxembourg	80,5	112,0
Italy	69,4	112,8
Netherlands	79,6	114,9
Portugal	63,3	117,0
Spain	67,6	117,0
Ireland	77,5	118,4
Iceland	73,0	122,6

Country	1990	2005
Iceland	1,8	2,1
Switzerland	0,5	3,4
Luxembourg	1,3	4,2
Ireland	12,9	4,4
Norway	5,3	4,6
Netherlands	5,9	4,7
United Kingdom	7	4,8
Austria	2,7	5,2
Denmark	9,7	5,7
Sweden	1,6	5,8
Portugal	4,2	7,6
Italy	8,9	7,7
Belgium	6,6	8,4
Finland	3,2	8,4
Germany	6,2	9,1
Spain	16,3	9,2
France	9	9,7

GDP per Capita

Current prices in US Dollars

Inflation, consumer prices

Index, 2000= 100

Unemployment rate

% of tot labour force

Socio-economic statistics for Western Europe in 1990 and 2005. Source: International Monetary Found, World Monetary Outlook Database, April 2007 [JL] .

Country	1995	1997	2000	2005	1997	2000	2005	1997	2000	2005
	EU 27	94,0	94,1	94,2	94,9	7,3	3,5	2,3		8,6
EU 25	100	100	100	100	2,6	2,4	2,2	9,3	8,6	8,7
Euro area	110,6	109,3	108,9	105,4	1,6	2,1	2,2	10,6	8,1	8,6
the Czech Republic	69,4	68,9	64,8	73,3	8,0	3,9	1,6	---	8,7	7,9
Hungary	47,7	48,6	53,0	61,6	18,5	10,0	3,5	9,0	6,4	7,2
Poland	40,5	44,2	45,7	48,4	15,0	10,1	2,2	10,9	16,1	17,7
Romania	---	---	24,5	32,7	154,8	45,7	9,1	5,3	7,2	7,2
Slovakia	45,3	49,0	47,5	56,8	6,0	12,2	2,8	---	18,8	16,3
Slovenia	68,4	71,5	73,3	80,5	8,3	8,9	2,5	6,9	6,7	6,5
Bulgaria	30,1	25,0	26,3	33,5	---	10,3	6,0	---	16,4	10,1
Netherlands	116,7	120,1	127,0	124,5	1,9	2,3	1,5	4,9	2,8	4,7

GDP per capita

in Purchasing Power Standards

EU 25 = 100

Inflation rate,

consumer prices

Index, 2005 = 100

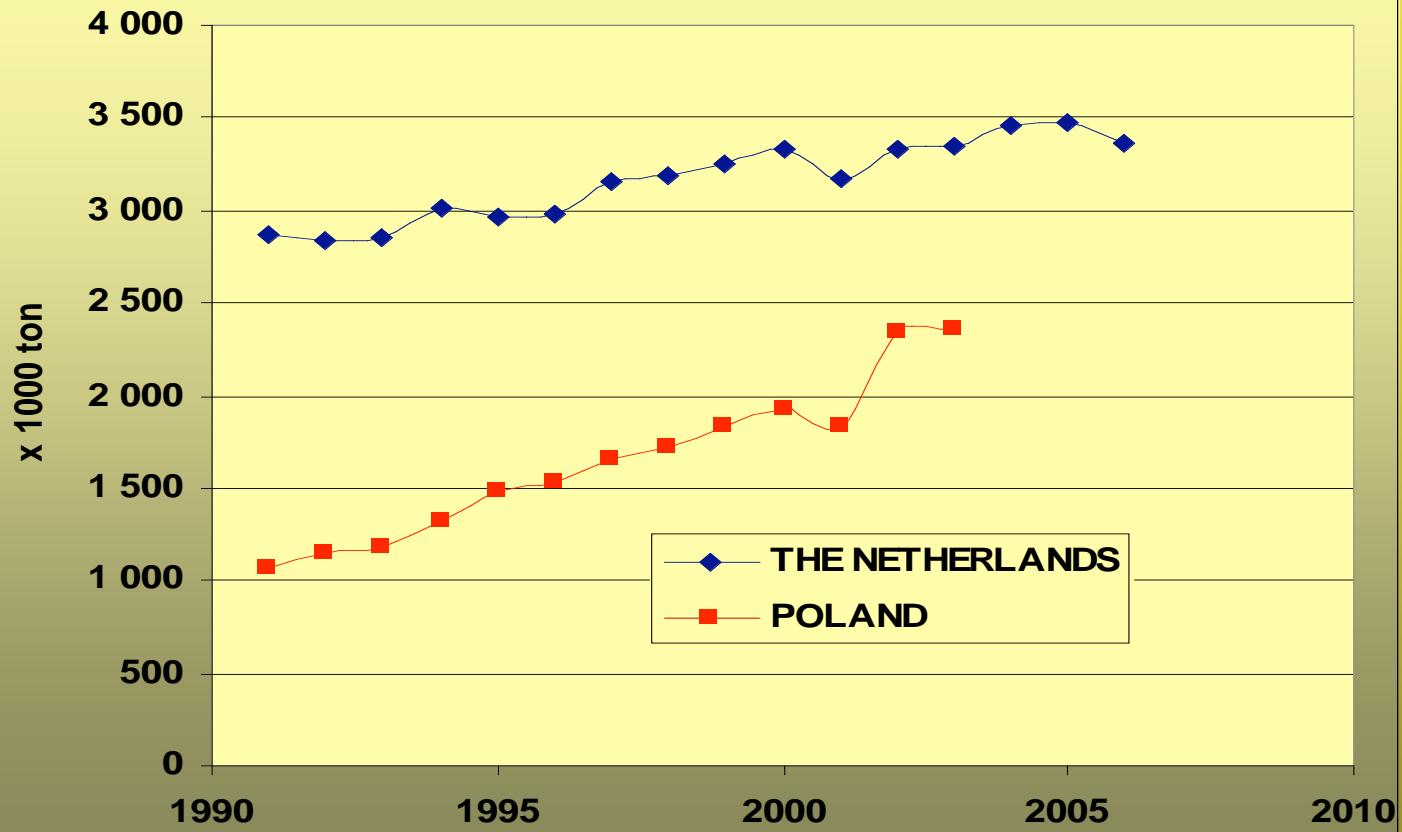
Unemployment rate

% of total labour

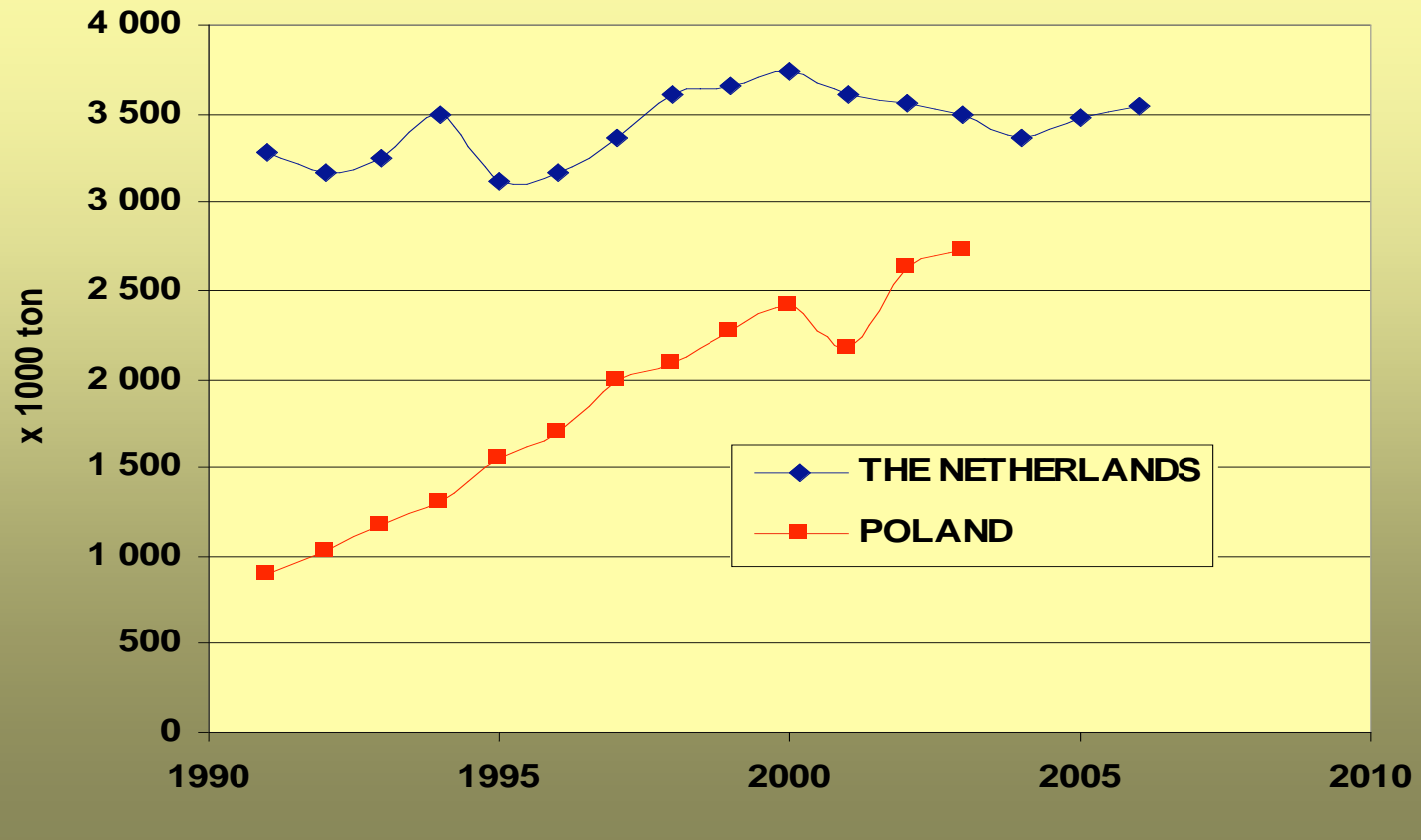
force

Socio-economic statistics for Central Europe in 1990 and 2005. Source: Eurostat, April 2007 [DG].

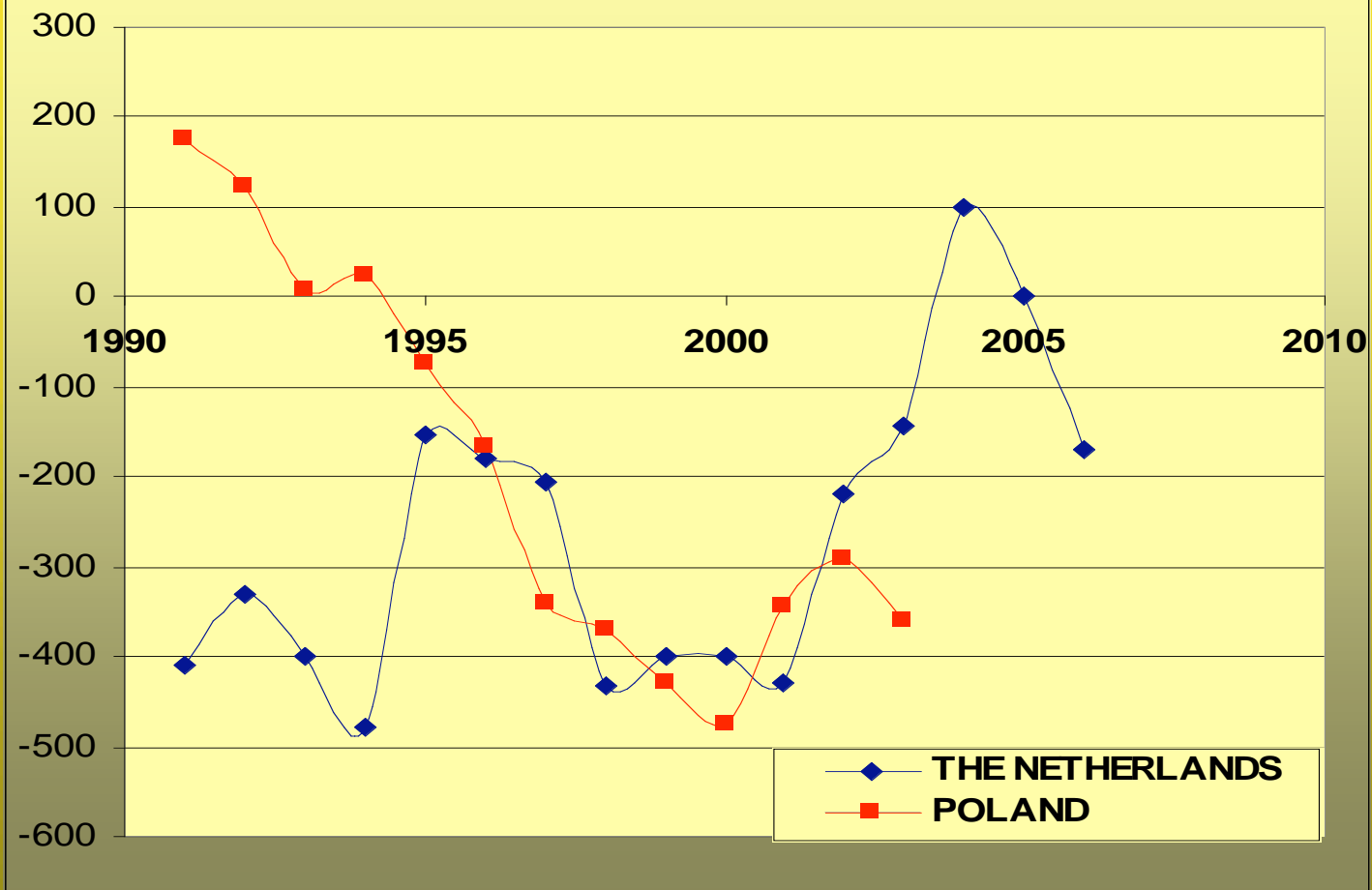
Total Paper Production (x 1000 ton)



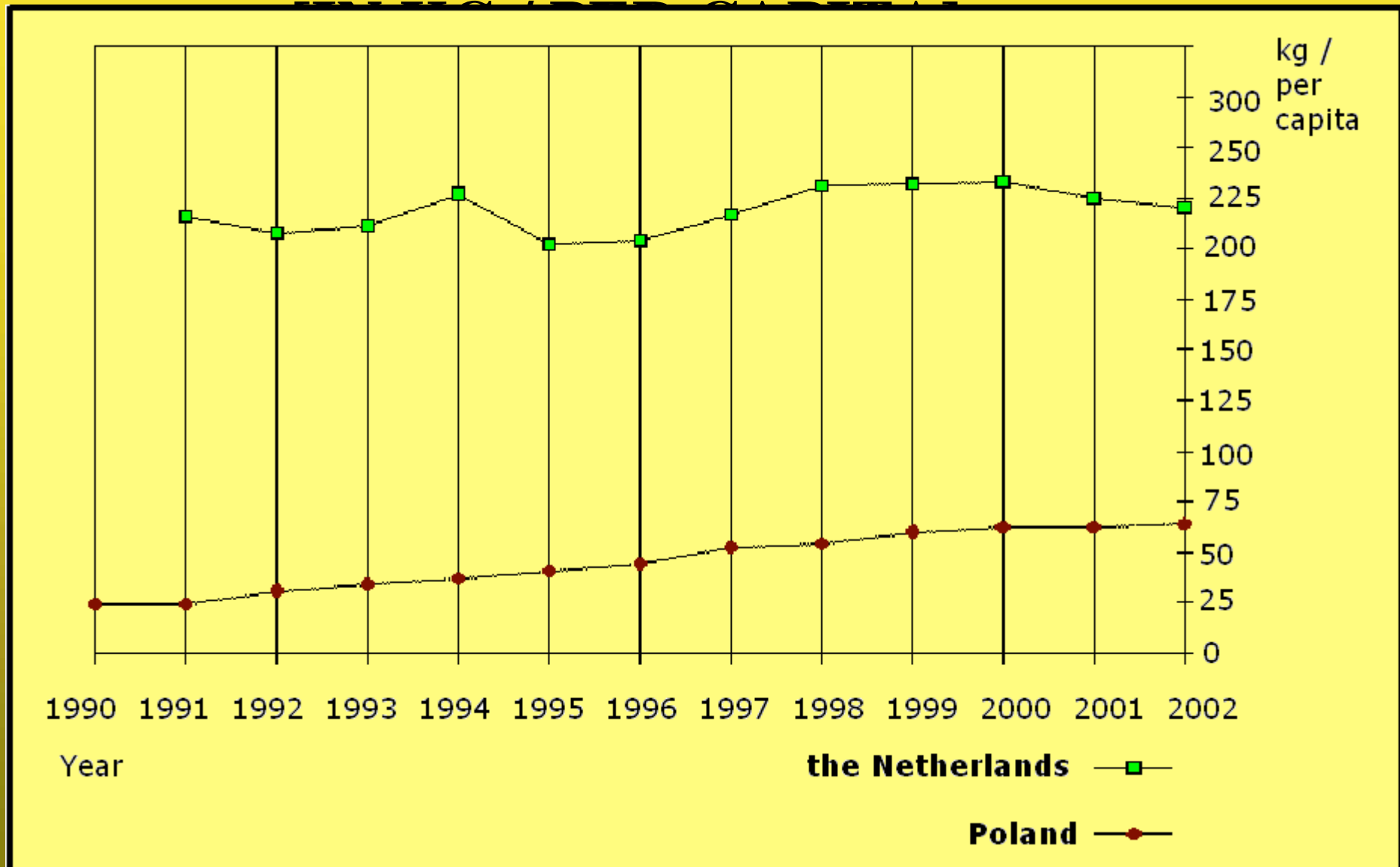
Total Paper Consumption (x 1000 ton)



Production - Consumption = Net Balance

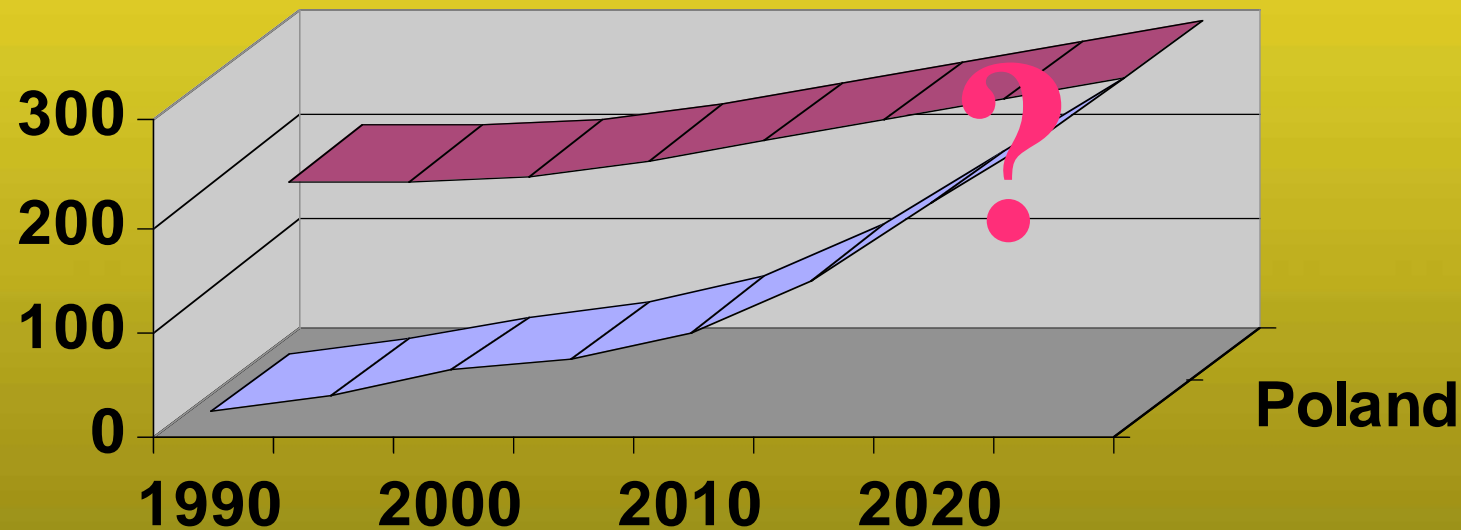


PAPER AND BOARD CONSUMPTION



Source: CEPI STATISTICS 2005, WZT.

VERY OPTIMISTIC FORECAST – PERSPECTIVE TILL 2025



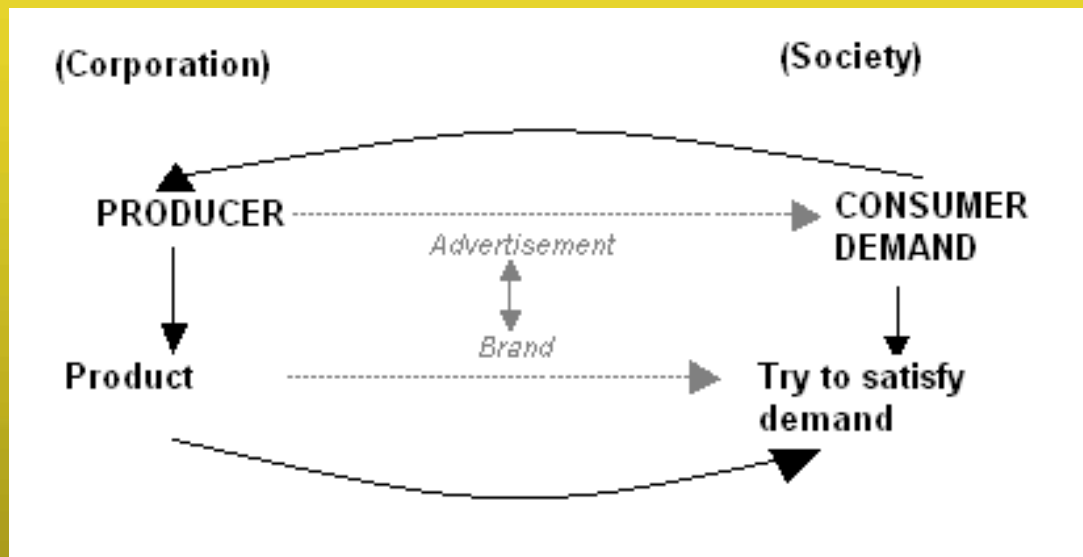
■ Poland

■ European Union

PART II

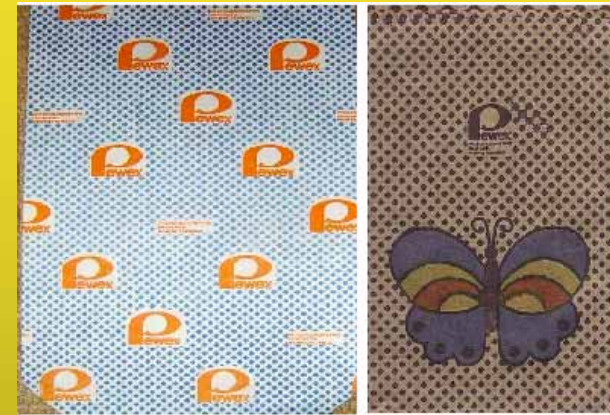
POLAND: *Consumer developments*

ADVERBS AND CONSUMER SOCIETY



Relation between producer and consumer, product and demand.

Based on Patrzalek 2004. Source: Private archives.



PAPER > IDENTIFICATION OF THE MARK

POLAND: *Consumer developments*



Exemple of adverbs campany: “Ecopositive Ones”. “Metro” newspaper action. The inscription is “I throw out to the can” and under the logo of newspaper is a small inscription “Completly recycling”. Source: Photo D.G, 20th July 2007.

POLAND: *Consumer developments*

TOILET PAPER AND QUALITY DEMAND



Ques were characteristic for PRL period.

Source: Internet 6, Photo A.Góralski.

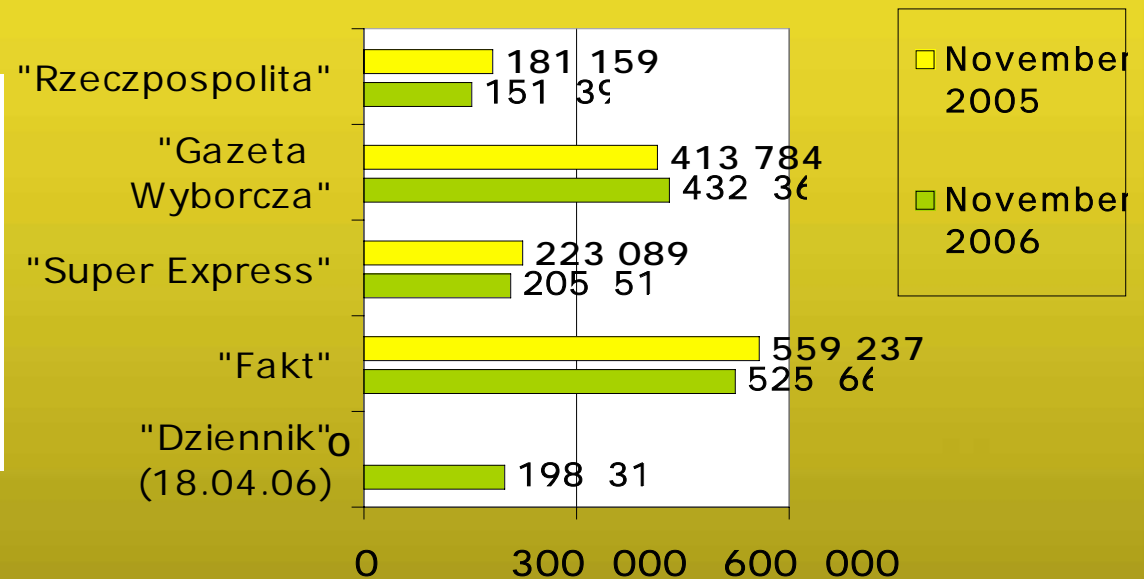
In 1990 two options for toilet paper exist, Available or not! Nowadays there are many kinds of toilet paper, with any colour you want and any smell.

Astonishing is that next to this high quality products still exist ordinary “brown toilet paper” with a “socialistic quality”.

POLAND: *Consumer developments*

NEWSPAPER AND INFORMATION SOCIETY

	January 2006	December 2006
"Fakt"	511 868	504 755
"Gazeta Wyborcza"	385 272	480 544
„Dziennik” (since 18.04.06) (April 2006)	253 400	211 610
„Super Express”	204 362	211 558
"Rzeczpospolita"	178 002	152 278



That statistics confirm that newspaper sale is decreasing. It is based on data from Control of Press Distribution Union. According this information only one from five mentioned journals has got bigger sale. What could be the reasons for this state?

POLAND: *Consumer developments*

NEWSPAPER > ADDED VALUE

(NOT ONLY INFORMATION)

📁📰 Weekday additions – sides for everybody

📰📰 (Sports fans, Motorization fans, etc.)

2) Extra additions – collections

(Cooking recepies)

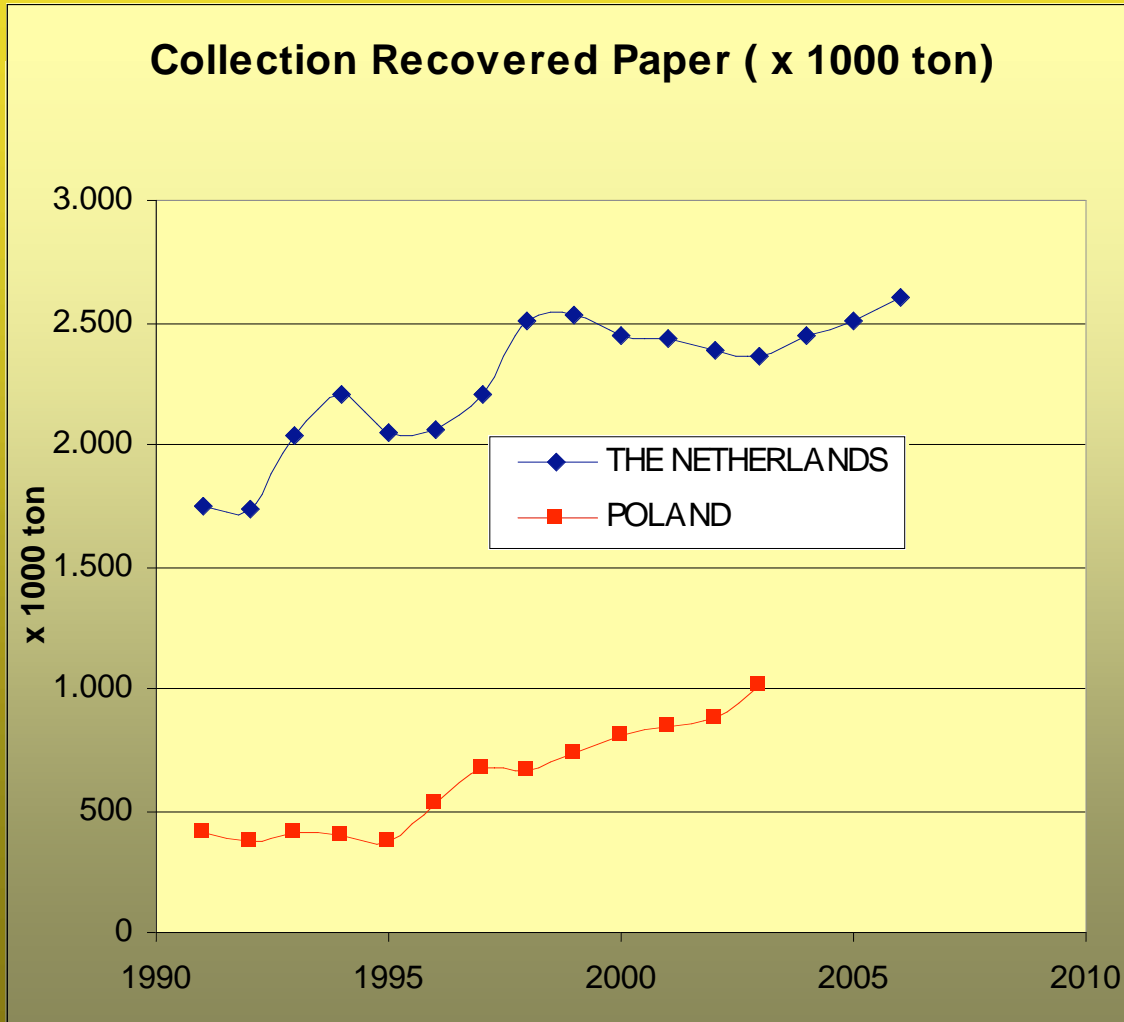
3) Subscription

4) Intensive adberb campany

5) Electronic version of newspaper



Collection of recovered paper has increased...

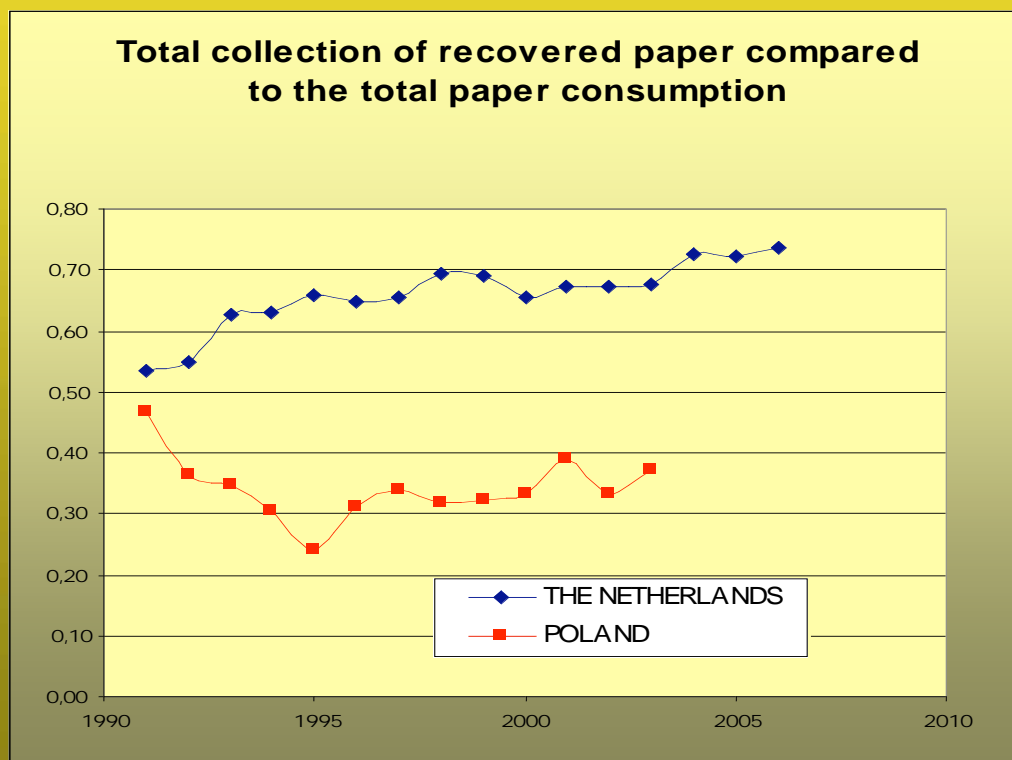


..but, in contrast to the production and consumption of paper, not faster than in e.g. the Netherlands, where the collection is already high...

Source: CEPI statistics

The collection RATE has NOT increased

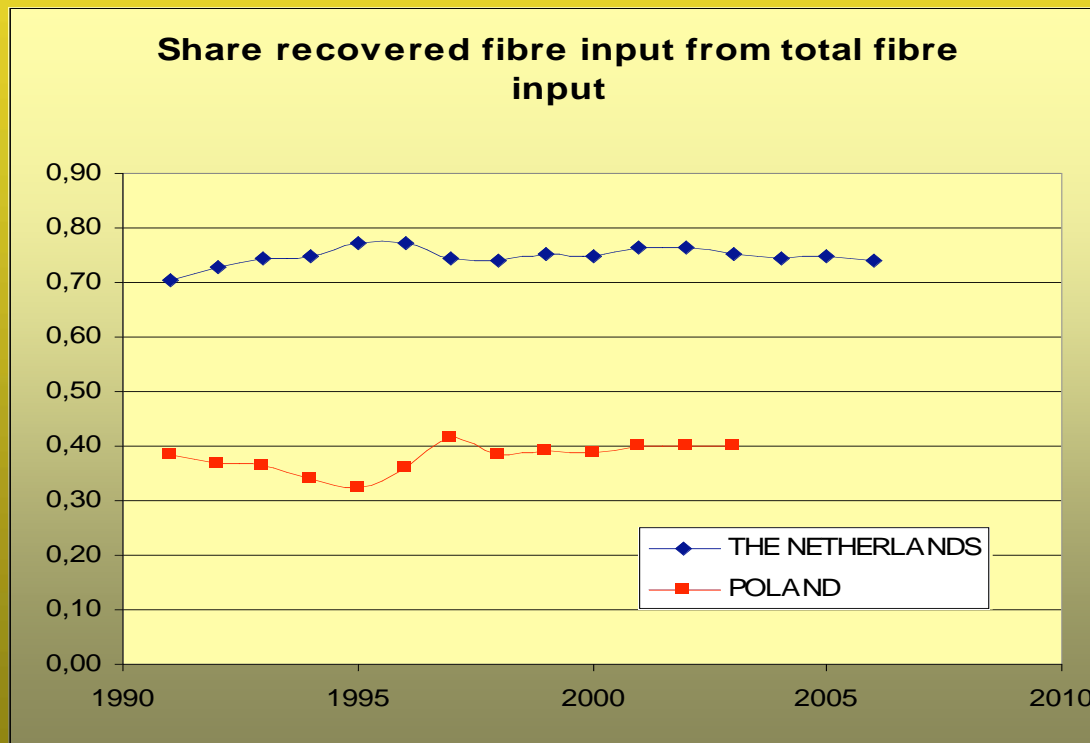
The paper consumption has increased enormously, the paper collection has also increased, but not as fast as the paper consumption. The results is a small decline in the collection rate.



Source: CEPI statistics

USE OF RECOVERED PAPER IN POLISH INDUSTRY

The share of recovered fibers vs. virgin fibers has remained rather constant



Source: CEPI statistics

PART III - SUMMARY:

- Polish paper and board sector is developing at fast rate and it's very perspective. Use of paper products per capita will increase.
- Polish society – consumer society (advertisements play important role).
- Still a huge difference between Poland and Western European countries (the collection rate) - still learning “culture of using paper”.