

The European Declaration on Paper Recovery

Review 2000-2005



FEFCO
European Federation of
Corrugated Board Manufacturers

ERPA
EUROPEAN RECOVERED PAPER ASSOCIATION

cepi

Introduction

The First European Declaration (*European Declaration on Paper Recovery, 2000*) was signed by The Confederation of European Paper Industries (CEPI), The European Recovered Paper Association (ERPA) and The European Federation of Corrugated Board Manufacturers (FEFCO). It was also supported by the European Paper Merchants Association (EUGROPA), the European Federation of Waste Management and Environmental Services (FEAD), and the International Confederation for Printing and Allied Industries (INTERGRAF).

In this First Declaration, the signatories committed to take the necessary measures to ensure that by the year 2005 56 + 1.5%¹ of the paper and board products consumed in Europe would be recycled.

After successfully achieving its recycling rate target in 2005, the industries promoting recycling are already preparing a New European Declaration on Paper Recycling. In Chapter 3 the differences of the old and new recycling targets are explained as well as the progress made between 1995 and 2005.



1. The Progress Made by 2005

In 2005, European (CEPI countries²) paper and board production was 97.1 million tonnes. During the same year the European paper and board industry utilised 46.6 million tonnes of recovered paper as raw material. The average recovered paper utilisation rate was 48.1%, the collection rate 63.5%, and the recycling rate 55.4%. Consequently, the European paper industry has reached its recycling rate target.

Both paper consumption and production have grown during the period of 1998-2005. During that period, paper consumption increased by 7.3 million tonnes to 84.3 million tonnes (+1.3%/a) and production climbed by 13.8 million tonnes to 97.1 million tonnes (+2.2%/a).

During the same period (1998-2005), utilisation of recovered paper as a raw material across the CEPI countries grew by 9.0 million tonnes to 46.6 million tonnes (+3.1%/a).

Recovered paper collection has grown fast at 4.7%/a, rising from 38.9 million tonnes in 1998 to 53.5 million tonnes in 2005.

Both the recovered paper related variables (recovered paper collection and utilisation) have grown faster than the paper related variables (paper production and consumption).

A summary of the historical development of the basic variables during the period 1998 to 2005 is shown in Table 1.

The historical development of the recycling rate, the collection rate and the recycling target are all shown in Figure 1.

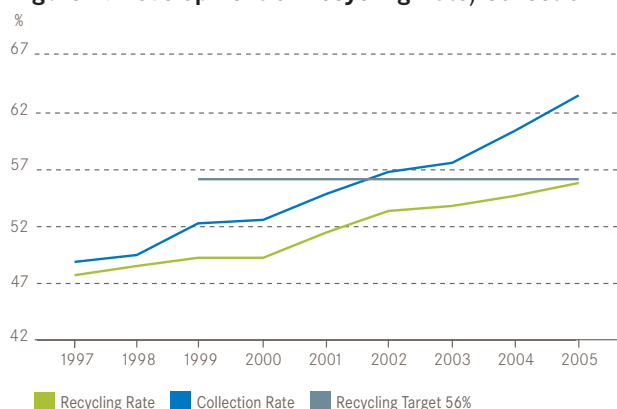
The production and consumption of paper and board in Europe in 2005 can be found in CEPI statistics³, along with the data for collection and utilisation of recovered paper by country.

Table 1: Basic Statistics, CEPI Figures 1998-2005

Million Tonnes	1998	1999	2000	2001	2002	2003	2004	2005
Paper and Board Consumption (A)	77.0	79.4	83.7	80.7	80.7	81.7	83.6	84.3
Paper and Board Production (B)	83.3	85.9	90.7	88.2	90.7	92.8	96.9	97.1
Recovered Paper Collection (C)	38.9	41.8	43.9	44.6	45.9	47.1	50.7	53.5
Recovered Paper Utilisation (D)	37.6	39.2	41.7	42.1	43.1	43.8	45.5	46.6
Collection Rate (%) (C/A)	50.5	52.6	52.5	55.3	56.9	57.6	60.6	63.5
Recycling Rate (%) (D/A)	48.9	49.4	49.8	52.1	53.4	53.6	54.5	55.4

Sources: CEPI Annual Statistics, 2005 figures from national associations

Figure 1: Development of Recycling Rate, Collection Rate and Recycling Target, 1997-2005



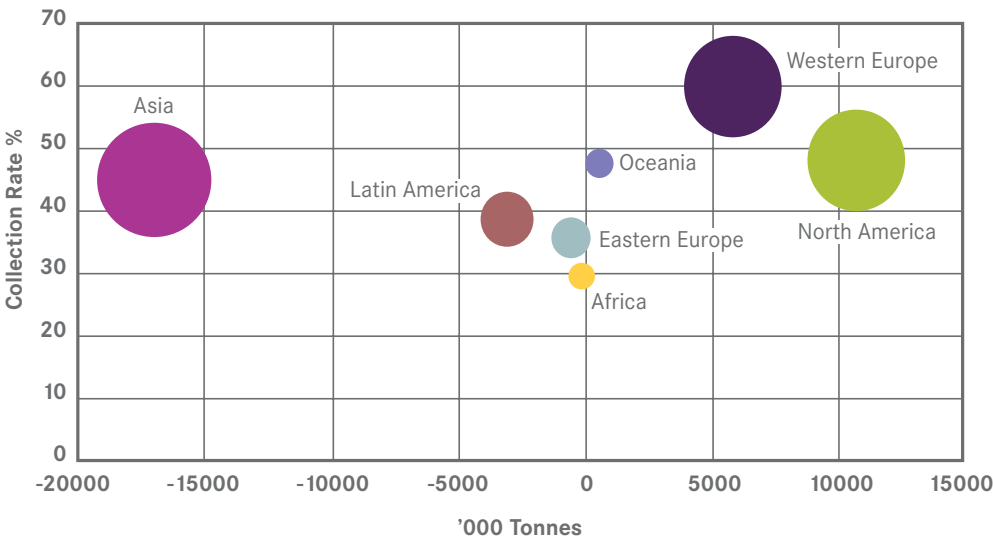
2. Global Recovered Paper Market, 2004

Global paper and board production totalled 360 million tonnes in 2004, with recovered paper utilisation standing at 178 million tonnes. The world average recovered paper recycling/collection/utilisation rate was 49%⁴.

The three biggest regions - Asia, Western Europe and North America - consume about 90% of all recovered paper globally.

Figure 2: Comparison Between Global Regions 2004

The size of each bubble indicates the RP (recovered paper) total collection volume in each country.



Source: Jaakko Pöyry Consulting 2006

3. Comparison Between the Old and the New Target

Geographic scope

The First Declaration covered CEPI countries (as of 2000, including Norway and Switzerland) only, whereas the New Declaration will cover 25 EU Member States, plus Bulgaria, Romania, Norway and Switzerland - 29 European countries in total. The extension of the scope of the New Declaration will significantly increase the volume of paper consumption that is used as denominator in the recycling rate calculation.

Recycling rate calculation

In the First Declaration the recycling rate was calculated by comparing recovered paper utilisation (in paper mills inside Europe) and paper consumption. Now, recovered paper exports will also be taken into account. If recovered paper is collected in Europe and utilised for similar purposes outside Europe, this volume will be included in the utilisation. By doing this, it is possible to compare global regions with each other.

However, both these changes make it impossible to compare the First Declaration period directly to the New Declaration. To facilitate such comparisons, Figure 3 shows historical developments in the 29 countries of the New Declaration, including the recovered paper net trade (under the new calculation method) and recovered paper utilisation.

Figure 3: Historic Progress in the New Declaration Area, Including Exports





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