



SODELUJEMO.
MREŽIMO.
SOOBLIKUJEMO ...
PRIHODNOST.

COLLABORATING.
NETWORKING.
SHAPING TOGETHER ...
OUR FUTURE.

Tadej Gosak
President of the Paper and Paper
Converting Industry Association,
Slovenia

Slovene paper industry **HERE AND NOW...**

6 paper mills
111 paper converters
117 companies
7 large
9 medium
11 small
90 micro

4,010 employees > paper mills 1,982
converters 2,026

€ 785.6m revenues > paper mills € 516.2m
converters € 269.2m

€ 425m investments in
the last 10
years

€ 560m of export > paper mills ~ 90%
converters ~ 38.7%
= 3.1 % of Slovene exports
by converting
sector in €

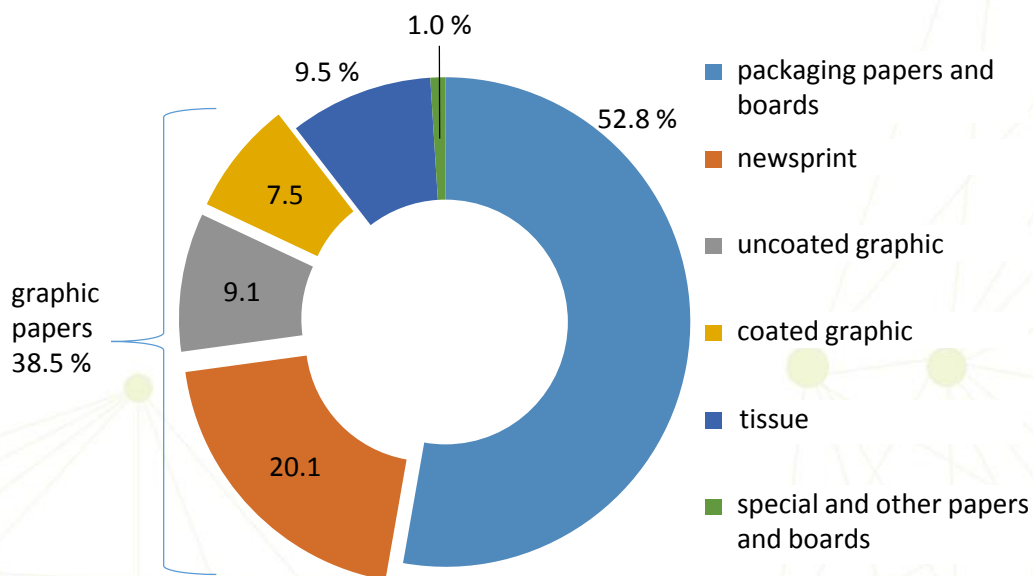
€ 175m of added value
= € 43,706 added value /
employee

> paper mills € 49,500
converters € 38,100

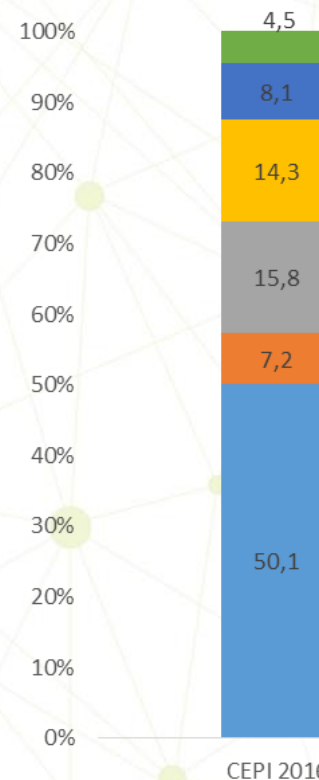
(data refer to 2016)

PRODUCTION IN SLOVENIA:

>> 756,200 tons of paper and board (2016)

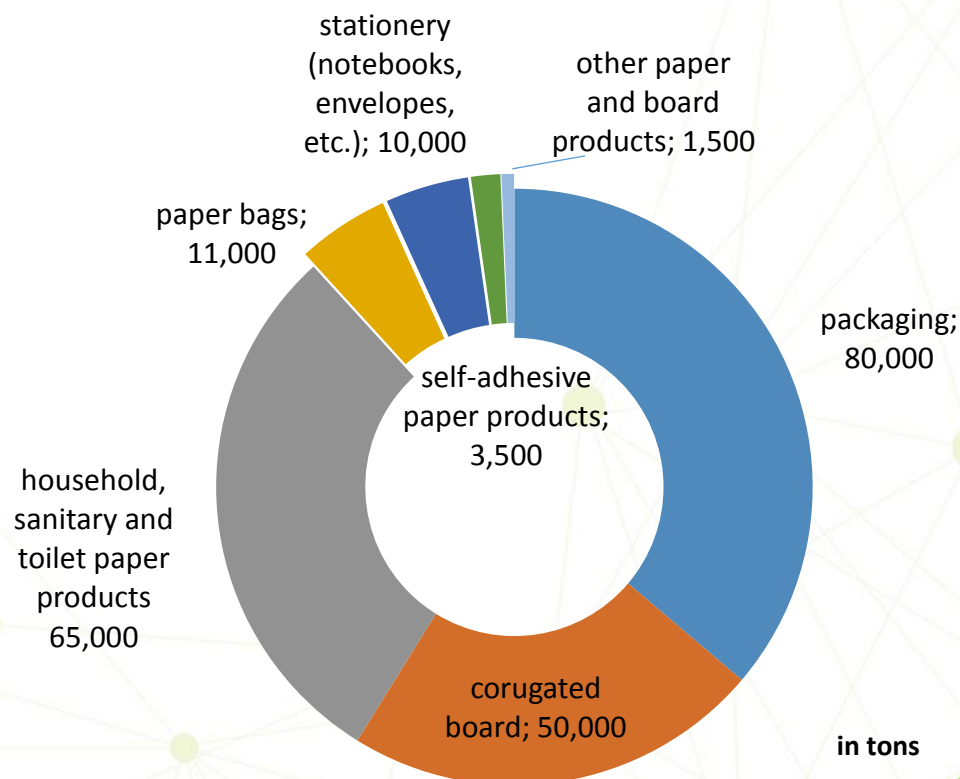


Source: PPCIA Survey, CCIS



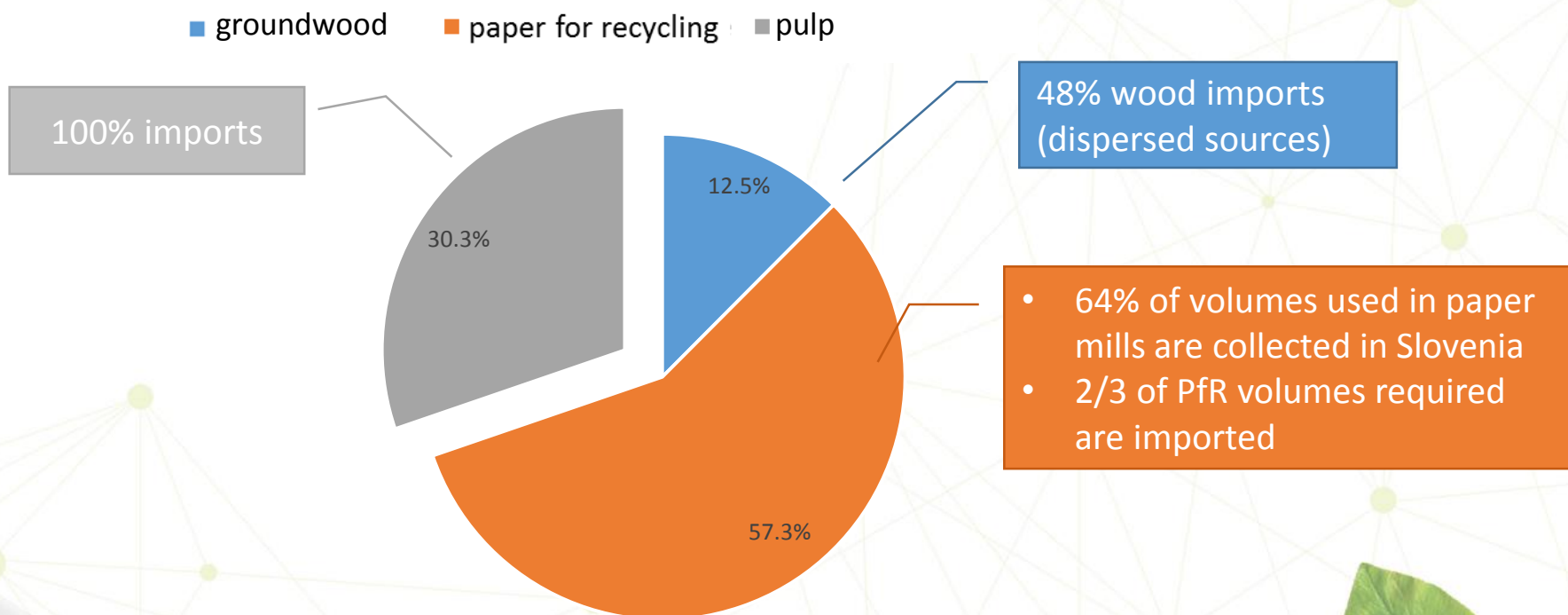
PRODUCTION IN SLOVENIA

>> 225,000 tons of paper and board products



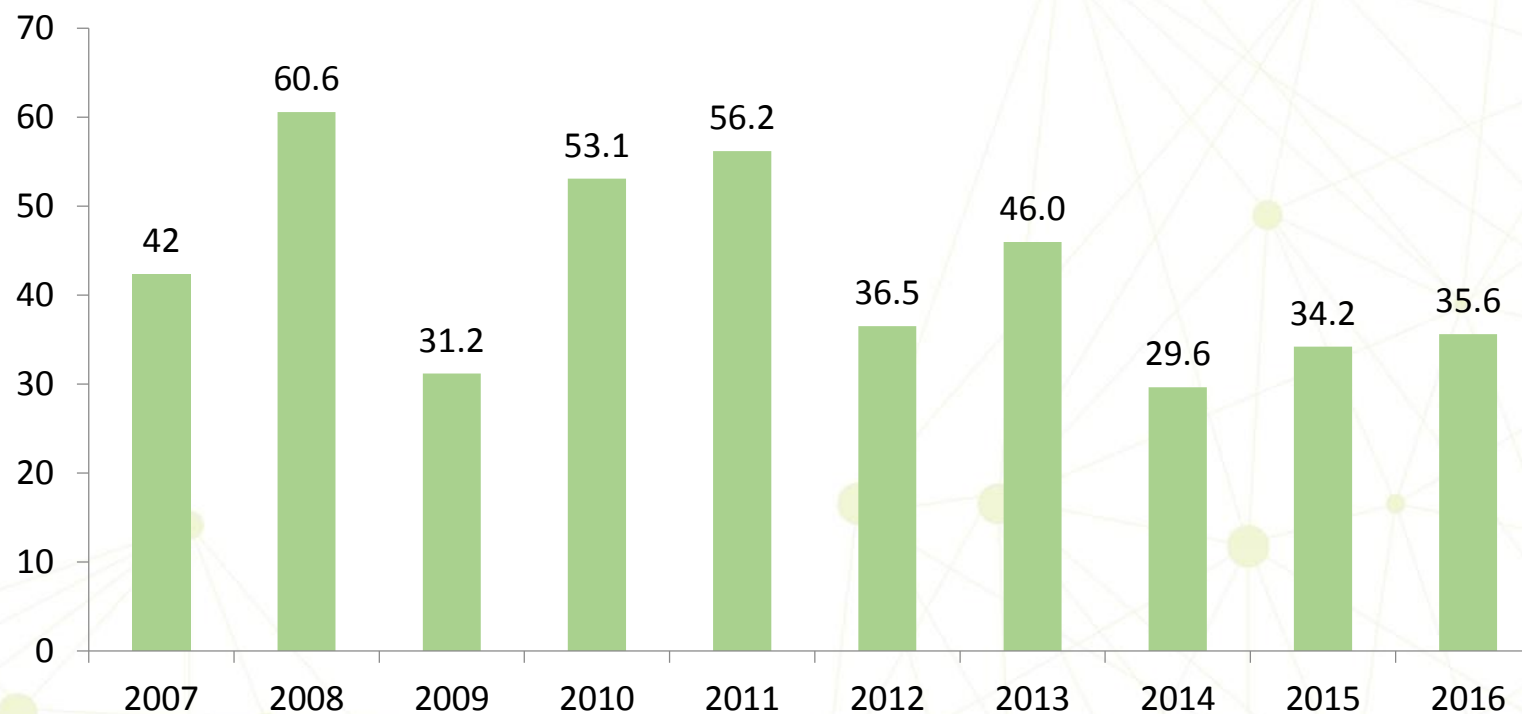
Source: PPCIA Survey, CCIS

RAW MATERIAL SOURCES FOR PAPER AND BOARD PRODUCTION IN 2016



Source: PPCIA Survey, CCIS

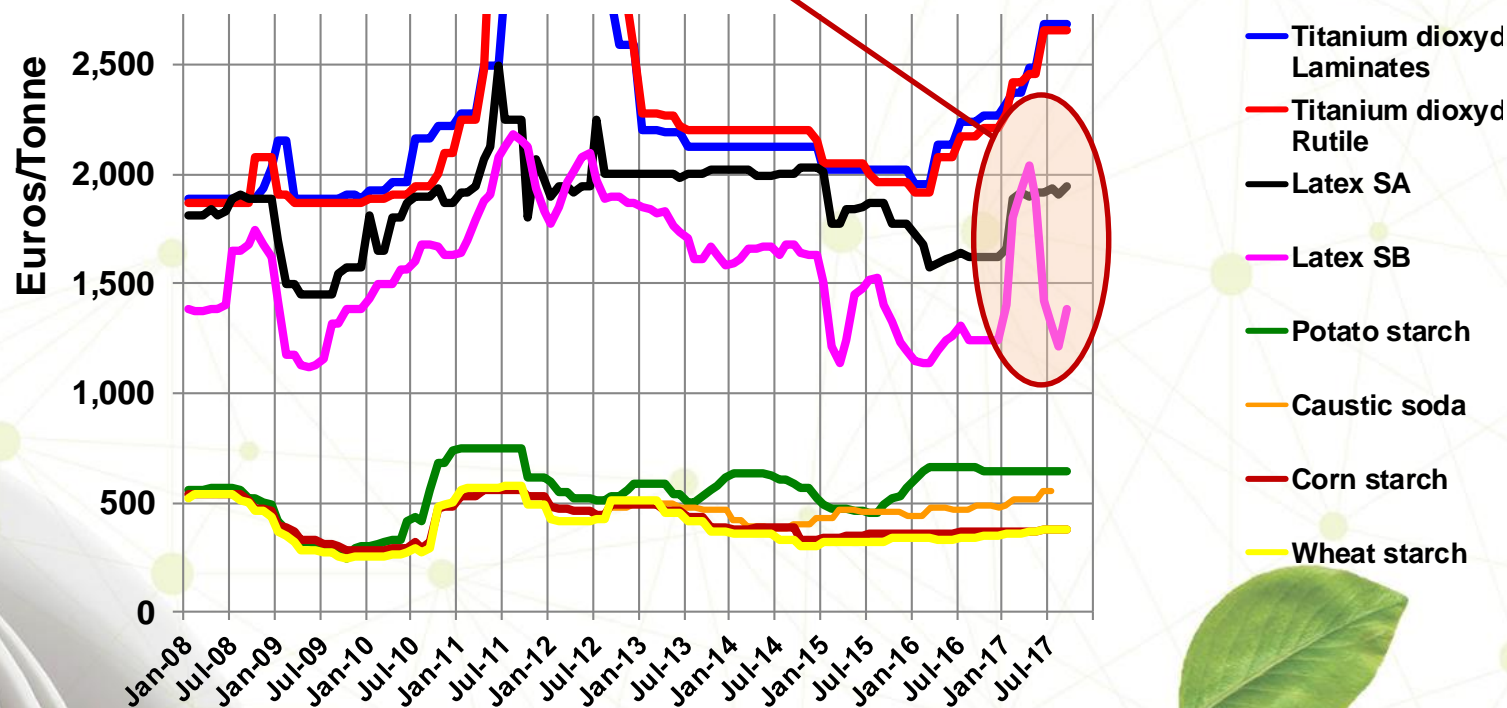
INVESTMENTS IN C17 in € million



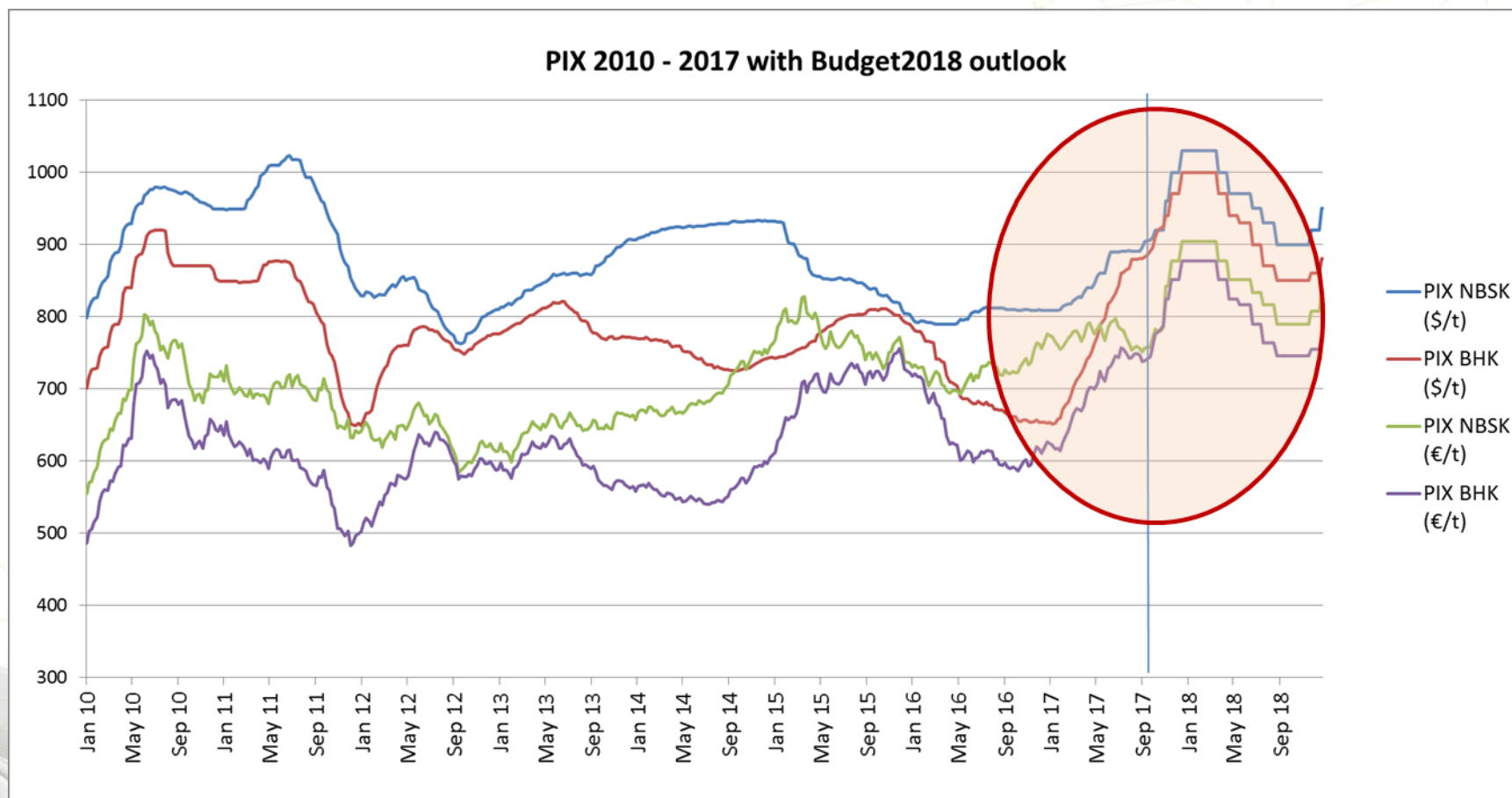
Source: PPCIA

IN 2017

- Economic growth (+4.4% for SI^{Q1-Q3}; +1.9% EU^{Oct 2017}), euro strengthening, reduction of unemployment...
- Growth of paper production +1.3% 2017^{Q1-Q3} in EU (Source: CEPI)
- Surprises on raw material markets (latex, pulp, paper for recycling...)



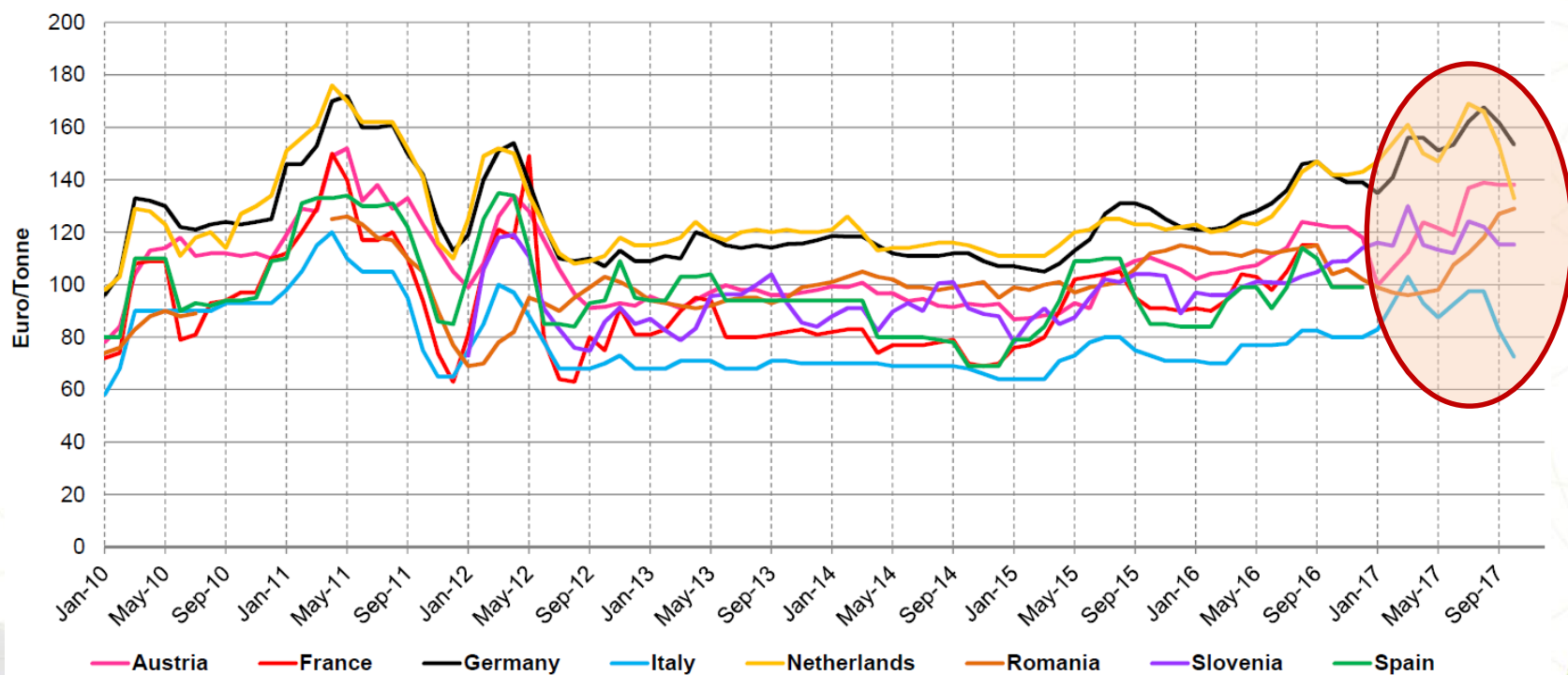
PULP PRICES



Source: RISI, October 2017

PRICES OF PAPER FOR RECYCLING

1.04: Corrugated Paper for Packaging



Ex-works prices: France, Italy, Spain and United Kingdom; Free-delivered prices: Germany and the Netherlands

Source: CEPI, October 2017

THE FUTURE WILL BE SHAPED, CREATED BY...

Legislation. Energy. Sustainability. Recyclability.
Circulation. Digitalisation. Breakthrough, new
technologies. Water. Nature. Wastes. Environmental
footprint. No-/Low-carbon. Nano. Bio-based.
Renewable raw material and energy sources. Green.
Cascading use of resources and raw materials.
Borderless industries. New technologies. Politics.
Climate change. ...



PAPER AND PAPER CONVERTING INDUSTRY ASSOCIATION

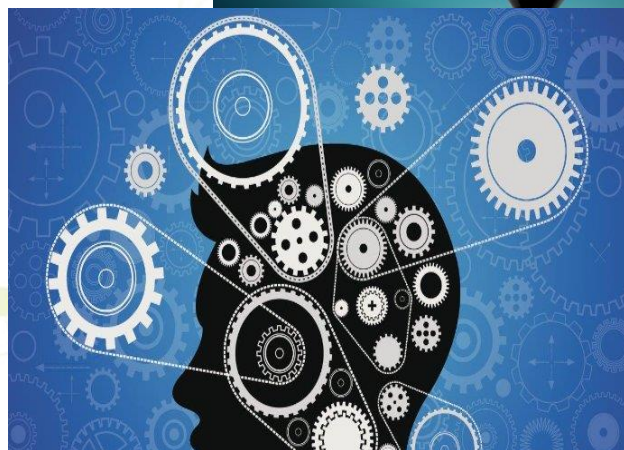
MISSION:

providing competitive
operating conditions
for the industry



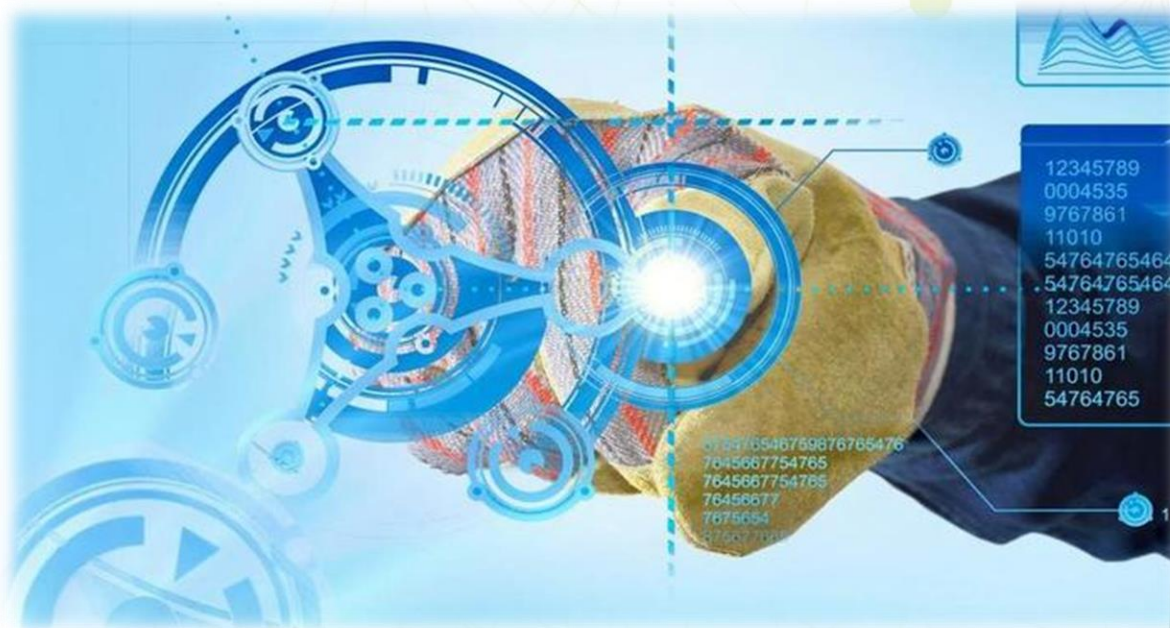
FUTURE CHALLENGES FOR THE INDUSTRY

- Legislation
- Digitalisation
- Technological development
- Innovations
- Personnel and education



FOR A SUCCESSFUL DEVELOPMENT OF PAPER INDUSTRY WE NEED:

- Qualified personnel
- Innovative products
- Investments in modern technology
- Competitive business environment





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