

Key Statistics 2025

European pulp & paper industry





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Introduction

Welcome to the latest issue of Cepi's Key Statistics. This booklet contains the key statistics necessary to give a clear picture of the performance of the European pulp and paper industry in 2025.

The Confederation of European Paper Industries (Cepi) is a Brussels-based non-profit making organisation founded in 1992, which represents the European pulp and paper industry towards the European Institutions. Through its member associations, Cepi also represents approximately 450 pulp, paper and board producing companies across Europe, ranging from small and medium-sized enterprises to multinationals (counting companies with a presence in more than one Cepi country only once). It represents 90% of the European¹ pulp and paper industry in terms of production. The pulp and paper industry provides 176 000 jobs in Europe directly. It has a turnover of 95 billion euros and adds 18 billion euros to the EU GDP. It is strong in export markets, with an export rate of 20% of its paper and board production.



Circular Economy in the European Pulp and Paper Industry

The European Pulp and Paper industry plays a big role in the circular economy.

This icon highlights the many areas that are circular in our sector.

More information on circular economy can be found on Cepi's website.

cepi.org/policy-area/sustainability-circularity



Members of Cepi in 2025

The National Associations of the 19 following countries are Cepi members: Austria, Belgium, Czech Republic, Finland, France, Germany, Greece, Hungary, Italy, The Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, and United Kingdom.



Data quality and compliance with EU competition rules.

Responsibility for the collection and management of statistical data lies with the Cepi statistics department, which is constantly working to improve the quality of the data reported.

In order to further increase the reliability and credibility of the data reported, Cepi has commissioned Deloitte to issue a limited assurance statement on the data quality rating that Cepi carried out on its core indicators in the statistics report. The limited assurance statement is available at [Cepi.org/statistics](https://cepi.org/statistics)

The compliance of the data produced with the EU competition rules is periodically checked by a law firm.



The statistics included in this booklet are a compilation of data received from the National Associations which are Cepi members, under the auspices of Cepi's Statistics Network.

Some additional sources, such as Eurostat, have been used where necessary and relevant.

Extra statistical information is accessible online to members on Cepi's Library at library.cepi.org and to non-members by subscription.



More statistics reports (annual, quarterly and monthly) are available by subscription:

- Please visit our website cepi.org/statistics-order-form

- Or contact Ariane Crèvecoeur – a.crevecoeur@cepi.org

Enzo Berdos – e.berdos@cepi.org

¹ Europe minus the Russian Federation








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Cepi Pulp and Paper Industry

	1991	2000	2010	2020	2024	2025	% Change 2025/2024	% Change 2025/2020
Industry Structure								
Number of Companies ¹	1 098	996	728	677	633	620	-2.1	-8.4
Number of Mills ²	1 586	1 325	890	804	759	740	-2.5	-8.0
Pulp - Non Integrated	296	233	54	52	44	43	-2.3	-17.3
Paper and Board Non Integrated	1 290	1 092	718	652	630	612	-2.9	-6.1
Pulp and Paper & Board Integrated	n.a.	n.a.	118	100	85	85	0.0	-15.0
Number of Paper Machines	2 200	1 876	1 411	1 253	1 164	1 142	-1.9	-8.9
Employment	416 613	284 487	196 364	183 911	179 438	176 387	-1.7	-4.1
Turnover ³ (Million Euros)	47 745	79 556	75 976	81 552	100 121	95 000	-5.1	16.5
Investments ³ (Million Euros)	n.a.	5 653	2 916	4 713	5 000	4 500	-10.0	-4.5
Added Value ³ (Million Euros)	n.a.	24 552	16 610	17 921	19 500	18 000	-7.7	0.4
Total Pulp⁴ ('000 Tonnes)								
Production Capacity	39 584	43 842	44 189	43 324	41 138	42 550	3.4	-1.8
Operating Rate	85.5%	91.2%	87.6%	83.2%	84.2%	80.4%	-3.8	-3.4
Production	33 842	39 969	38 695	36 049	34 633	34 208	-1.2	-5.1
Cepi Internal Deliveries	n.a.	39 231	37 045	33 899	30 244	28 932	-4.3	-14.7
Consumption ⁵ (Apparent)	38 019	46 490	43 905	37 838	35 976	34 263	-4.8	-9.4
Market Pulp ('000 Tonnes)								
Production	9 314	11 423	12 706	15 321	15 451	15 610	1.0	1.9
Exports to Outside Cepi	1 088	1 332	2 567	6 532	6 792	7 633	12.4	16.9
Imports from Outside Cepi	5 859	7 992	7 777	8 321	8 136	7 688	-5.5	-7.6
Trade Balance with Outside Cepi	-4 771	-6 660	-5 210	-1 789	-1 343	-55	95.9	-96.9
Consumption ⁵ (Apparent)	14 332	18 083	17 916	17 110	16 794	15 665	-6.7	-8.4
Exports/Production	11.7%	11.7%	20.2%	42.6%	44.0%	48.9%	4.9	14.7
Imports/Consumption	40.9%	44.2%	43.4%	48.6%	48.4%	49.1%	0.6	0.9
Paper and Board ('000 Tonnes)								
Production Capacity	73 557	98 027	104 119	101 008	95 133	95 837	0.7	-5.1
Operating Rate	88.9%	93.1%	91.8%	84.9%	82.7%	80.7%	-1.9	-4.9
Production	65 356	91 228	95 565	85 739	78 630	77 365	-1.6	-9.8
Cepi Internal Deliveries	n.a.	79 169	80 523	73 247	67 931	67 435	-0.7	-7.9
Exports to Outside Cepi	7 685	13 919	19 231	19 474	15 612	15 708	0.6	-19.3
Imports from Outside Cepi	3 886	6 491	5 987	5 442	5 105	5 148	0.8	-5.4
Trade Balance with Outside Cepi	3 799	7 428	13 244	14 031	10 507	10 560	0.5	-24.7
Consumption ⁵ (Apparent)	60 716	83 199	82 321	71 708	68 123	66 805	-1.9	-6.8
Exports/Production	11.8%	15.3%	20.1%	22.7%	19.9%	20.3%	0.4	-10.6
Imports/Consumption	6.4%	7.8%	7.3%	7.6%	7.5%	7.7%	0.2	1.5

Cepi Pulp and Paper Industry

	1991	2000	2010	2020	2024	2025	% Change 2025/2024	% Change 2025/2020
Wood ('000 m³)								
Consumption	120 274	148 093	148 901	146 515	141 195	142 125	0.7	-3.0
Hardwood	30 410	40 048	38 119	40 192	33 561	33 483	-0.2	-16.7
Softwood	89 863	108 046	110 782	106 323	107 634	108 642	0.9	2.2
Imports/Consumption	12.8%	17.1%	17.1%	14.5%	10.7%	8.2%	-2.5	-43.5
Domestic/Consumption	87.2%	82.9%	82.9%	85.5%	89.3%	91.8%	2.5	7.4
Paper for Recycling ('000 Tonnes) 								
Collection	25 566	44 083	56 401	55 097	52 181	51 906	-0.5	-5.8
Utilisation	25 476	41 308	48 325	48 280	46 228	45 275	-2.1	-6.2
Exports to Outside Cepi	741	3 795	9 875	8 679	7 824	8 509	8.8	-2.0
Imports from Outside Cepi	651	1 021	1 799	1 862	1 871	1 878	0.4	0.8
Trade Balance with Outside Cepi	90	2 775	8 076	6 817	5 954	6 631	11.4	-2.7
Utilisation Rate	39.0%	45.3%	50.6%	56.3%	58.8%	58.5%	-0.3	3.9
Exports/Collection	2.9%	8.6%	17.5%	15.8%	15.0%	16.4%	1.4	4.1
Imports/Utilisation	2.6%	2.5%	3.7%	3.9%	4.0%	4.1%	0.1	7.5
Recycling Rate in Europe⁶ ('000 Tonnes)   								
Paper for Recycling Collection	26 129	45 003	58 172	55 980	54 050	53 883	-0.3	-3.7
Paper and Board Apparent Consumption	64 801	86 826	84 873	76 361	70 732	70 484	-0.4	-7.7
Recycling Rate	40.3%	51.8%	68.5%	73.3%	76.4%	76.4%	0.0	4.3
Non-Fibrous Materials ('000 Tonnes)								
Consumption	9 521	15 626	16 235	10 701	9 341	8 655	-7.3	-19.1
Energy and Environment⁷								
Fuels Consumption ('000 Tj)	930	1 141	1 282	1 149	1 063	n.a.		
Biomass Use (%) of Total FC 	44.4	49.3	52.9	60.4	66.0	n.a.		
Electricity Consumption (GWh)	86 597	110 504	113 153	91 081	81 656	n.a.		
% of Electricity produced through CHP ⁸	88.0	90.4	95.4	95.7	95.7	n.a.		
CO₂ Emissions (Cepi Countries)								
CO ₂ Direct Emissions (Mt)	39.05	41.94	37.99	26.96	22.53	20.00	-11.2	-25.8
Specific CO ₂ Emissions (kt CO ₂ / kt of product)	0.54	0.42	0.35	0.27	0.24	0.22	-10.2	-19.3

¹ 450 groups or corporations in 2025, when considering the entities established in one or several countries that are not bound together by legal and/or financial links. Please note that, due to a mistake in reporting by one country, data for previous years has been updated.

² For 1991 and 2000, integrated mills are reported under pulp mills and paper & board mills, and are counted twice.

³ 2024 and 2025 figures are based on members' data, Eurostat and estimates for some countries. Data for 1991 is estimated by Cepi.

⁴ Total Pulp: Market Pulp + Integrated Pulp.

⁵ Cepi Apparent Consumption = production - exports to outside Cepi + imports from outside Cepi.

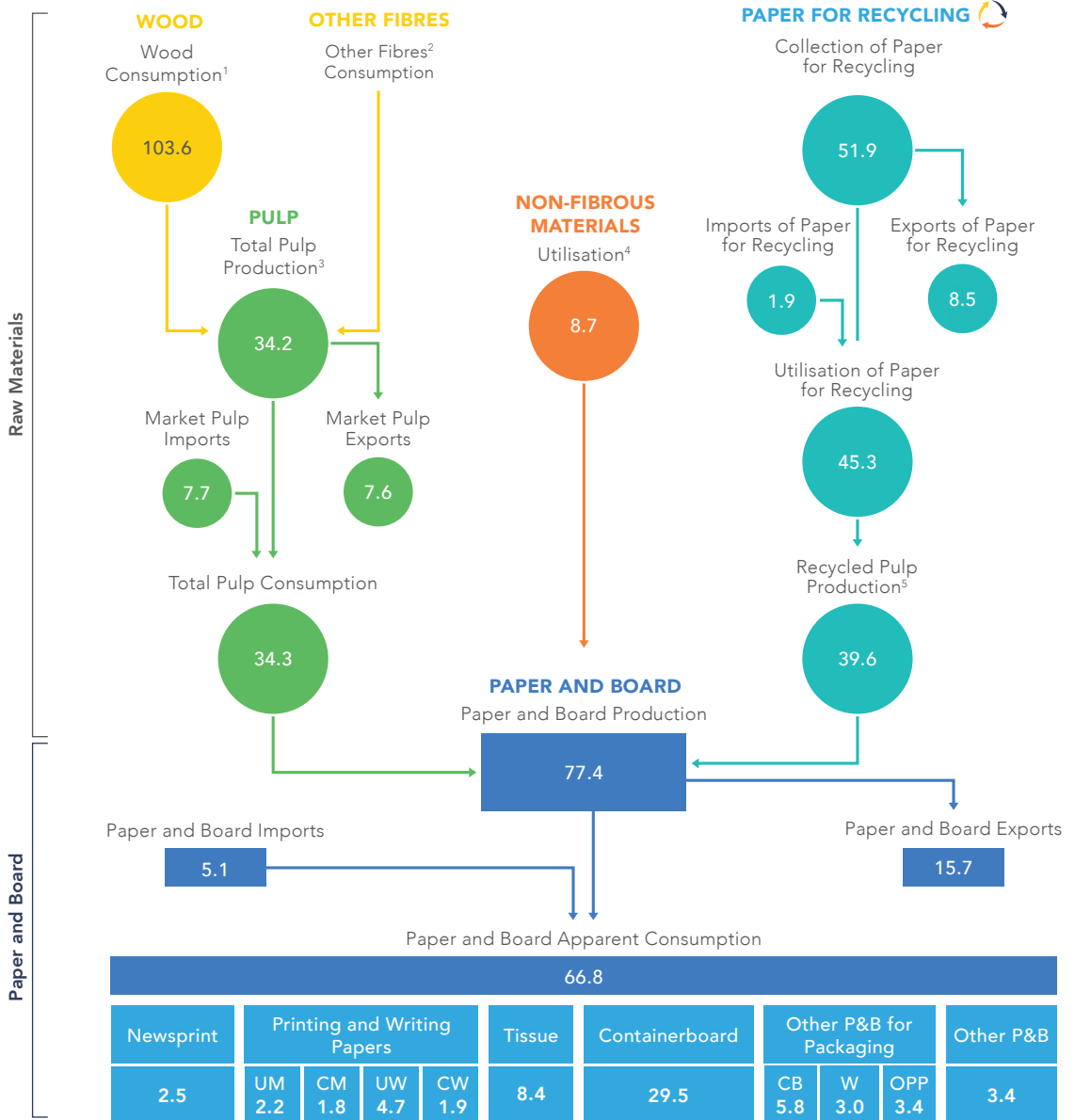
⁶ Europe means EU-27 countries plus Norway, Switzerland and the United Kingdom.

⁷ Greece, Hungary, Romania and Slovenia are not included in energy and environment data.

⁸ CHP: combined heat and power (compared to total on-site electricity generation).

Pulp and Paper Industry in 2025

Million Tonnes

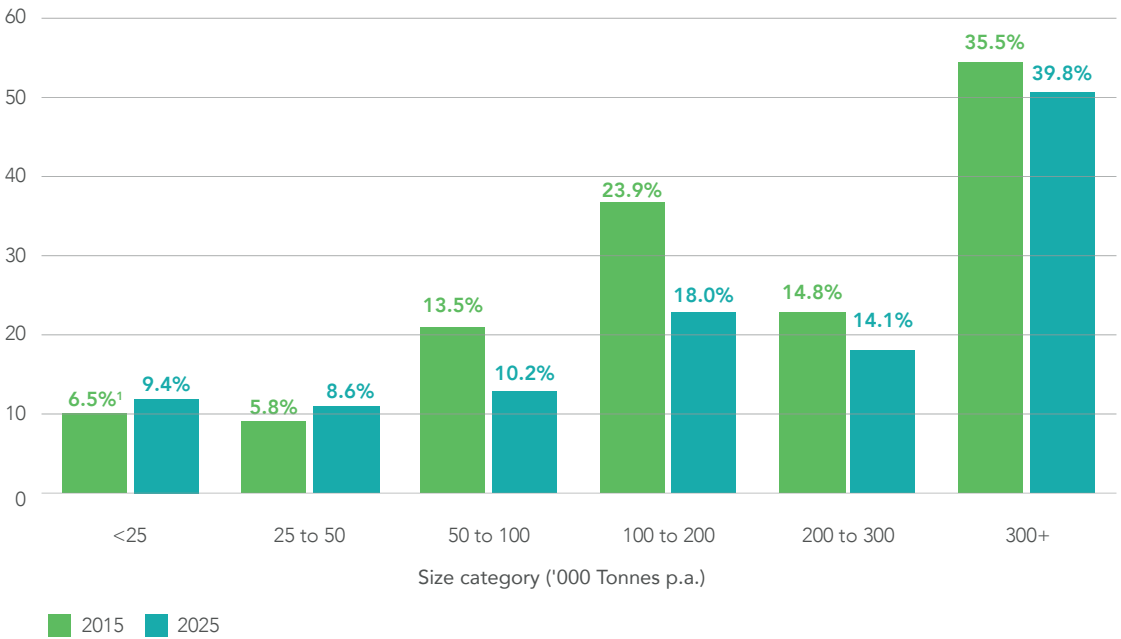


Paper and Board Apparent Consumption = Production + Imports from outside Cepi - Exports to outside Cepi.
 UM = Uncoated Mechanical - CM = Coated Mechanical - UW = Uncoated Woodfree - CW = Coated Woodfree
 CB = Cartonboard - W = Wrappings - OPP = Other Paper and Board for Packaging - Tissue = Tissue Paper (excluding converted products)

¹ Wood consumption: see definition on page 33.
² Straw, Bamboo, Bagasse, ...
³ of which Integrated Pulp 18.6 Million Tonnes
⁴ Non-Fibrous Materials: see definition page 33.
⁵ Estimated by Cepi.

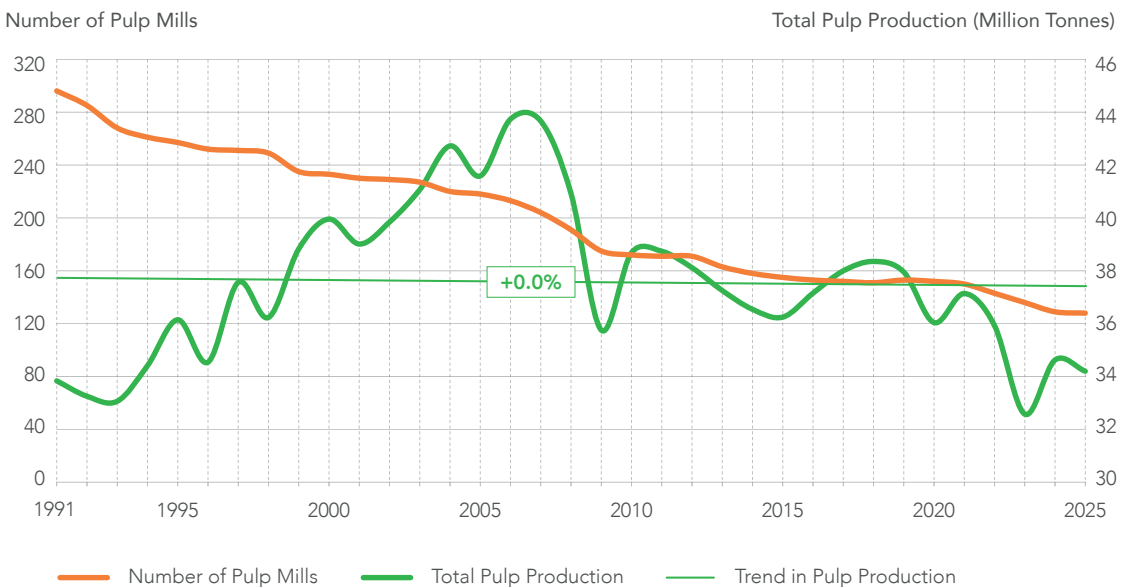
Number of Pulp Mills by Volume in 2015 and 2025

Number of Pulp Mills by Size Category



¹ Share of Total Number of Mills

Number of Pulp Mills and Total Pulp Production



Total Pulp¹ Production and Consumption

'000 Tonnes

Total Pulp ¹	Production			Apparent Consumption ³		
	2024	2025	% Change 2025/2024	2024	2025	% Change 2025/2024
Mechanical & Semi-Chemical Pulp	6 922	6 599	-4.7	6 809	6 329	-7.1
Sulphite Pulp	2 052	2 150	4.8	1 585	1 748	10.3
Sulphate Pulp	25 507	25 312	-0.8	27 285	25 931	-5.0
Chemical Pulp	27 559	27 462	-0.4	28 870	27 679	-4.1
Total Woodpulp	34 481	34 062	-1.2	35 679	34 007	-4.7
Other Pulp²	152	146	-3.8	297	255	-14.2
Total Pulp¹	34 633	34 208	-1.2	35 976	34 263	-4.8

... of which Market Pulp Production and Consumption

'000 Tonnes

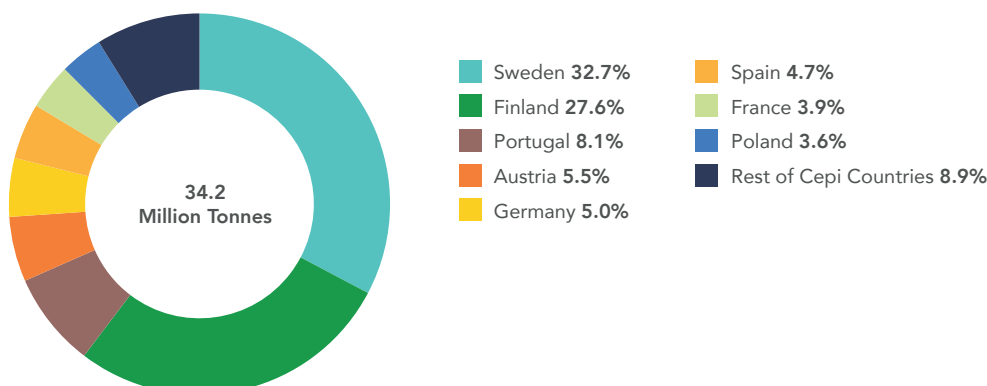
Market Pulp	Production			Apparent Consumption ³		
	2024	2025	% Change 2025/2024	2024	2025	% Change 2025/2024
Mechanical & Semi-Chemical Pulp	1 088	981	-9.8	975	710	-27.1
Sulphite Pulp	1 196	1 241	3.7	729	839	15.0
Sulphate Pulp	13 110	13 333	1.7	14 888	13 951	-6.3
Chemical Pulp	14 306	14 573	1.9	15 617	14 790	-5.3
Total Woodpulp	15 394	15 555	1.0	16 592	15 500	-6.6
Other Pulp²	57	55	-2.8	202	164	-18.8
Total Market Pulp	15 451	15 610	1.0	16 794	15 665	-6.7

¹ Total Pulp: Market Pulp + Integrated Pulp

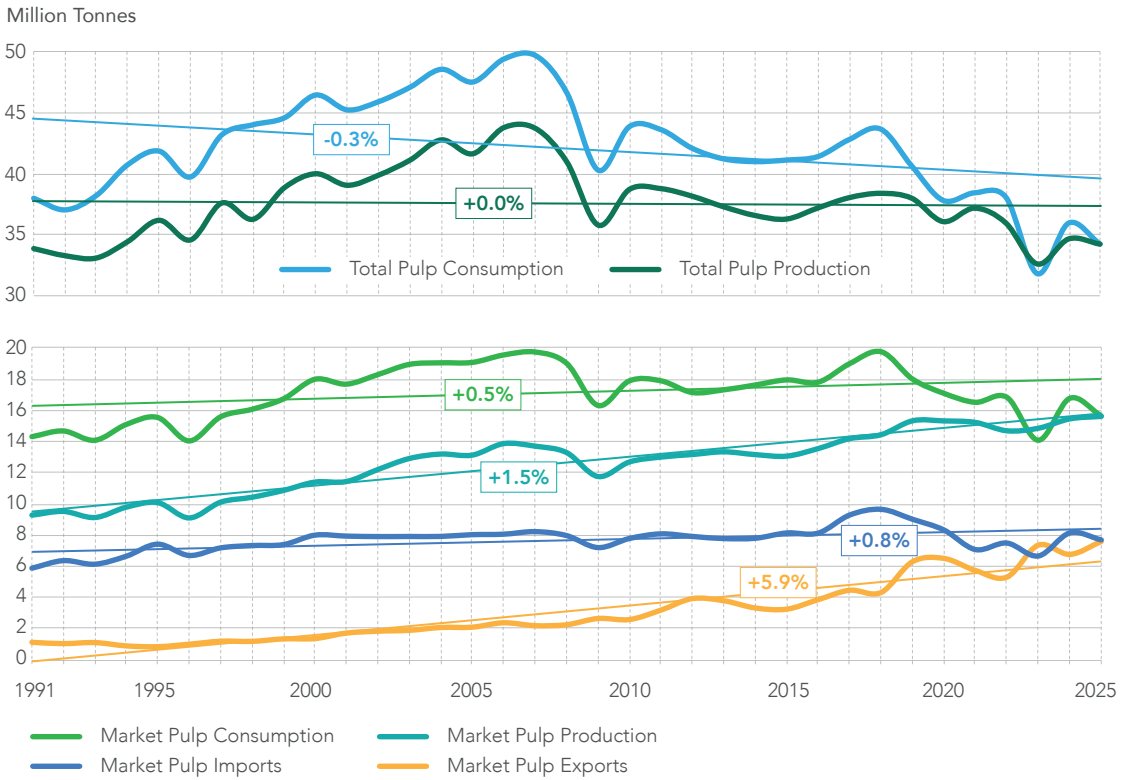
² Other Pulp: see definition page 33.

³ Total Cepi Consumption: production - exports to outside Cepi + imports from outside Cepi

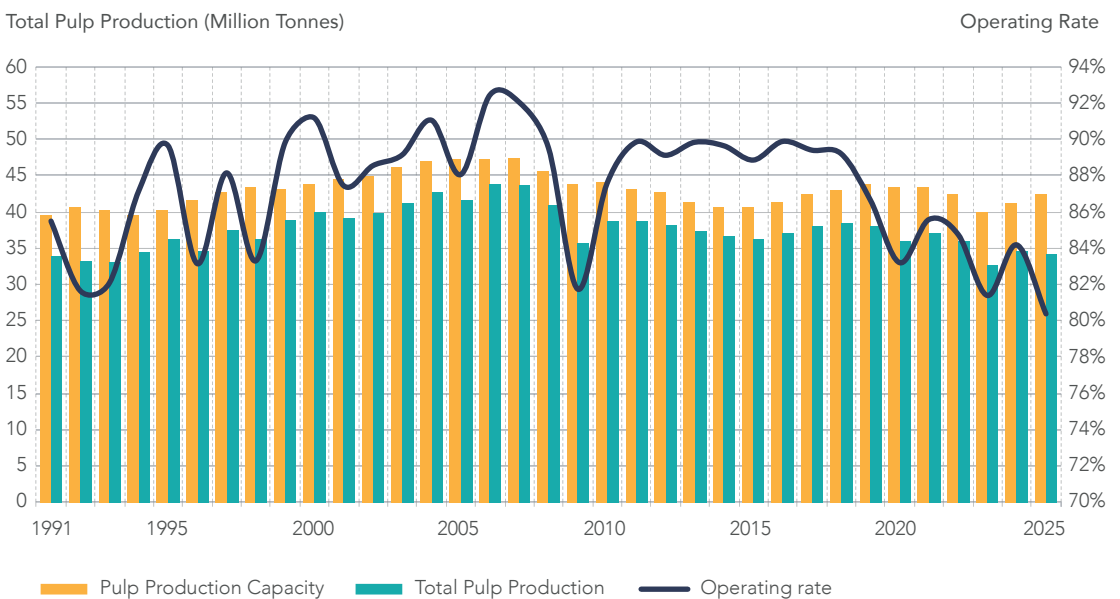
Total Pulp¹ Production by Country in 2025



Market Pulp and Total Pulp¹ Production, Trade and Consumption

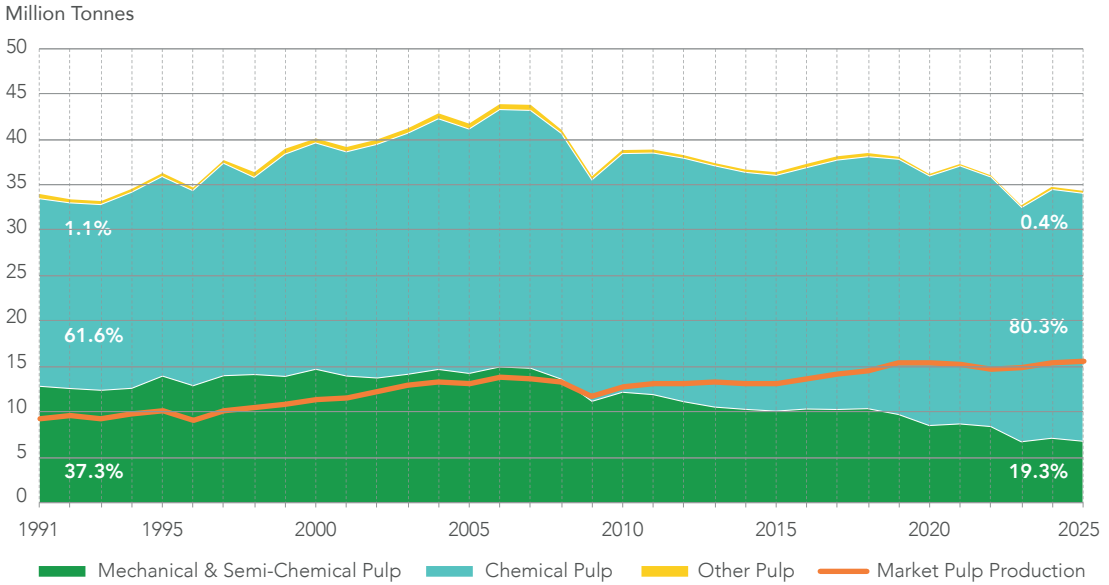


Total Pulp¹ Production and Capacity

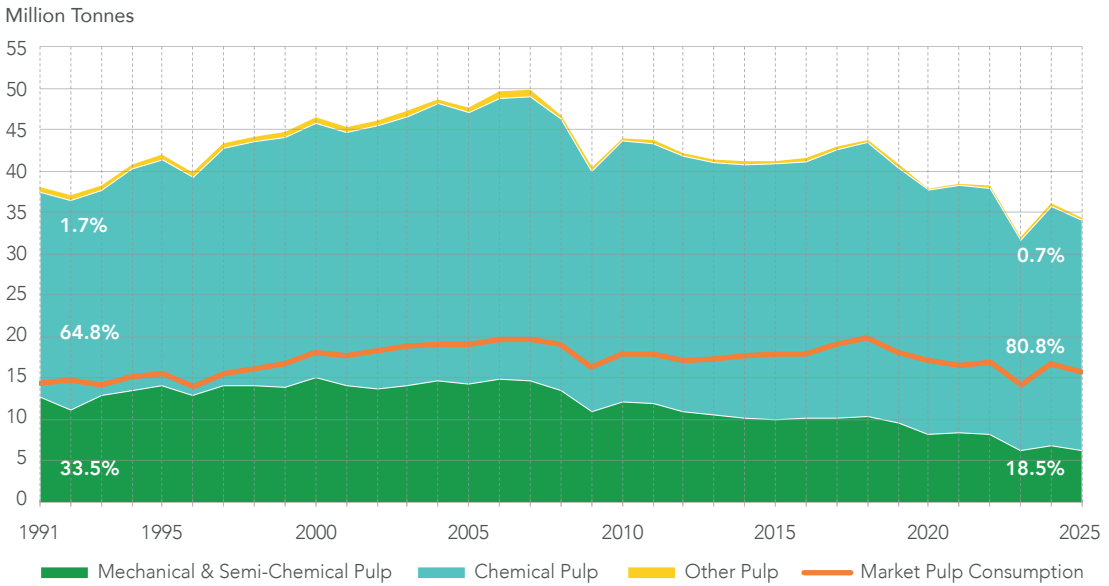


¹ Total Pulp: Market Pulp + Integrated Pulp

Total Pulp¹ Production by Grade and Market Pulp Production

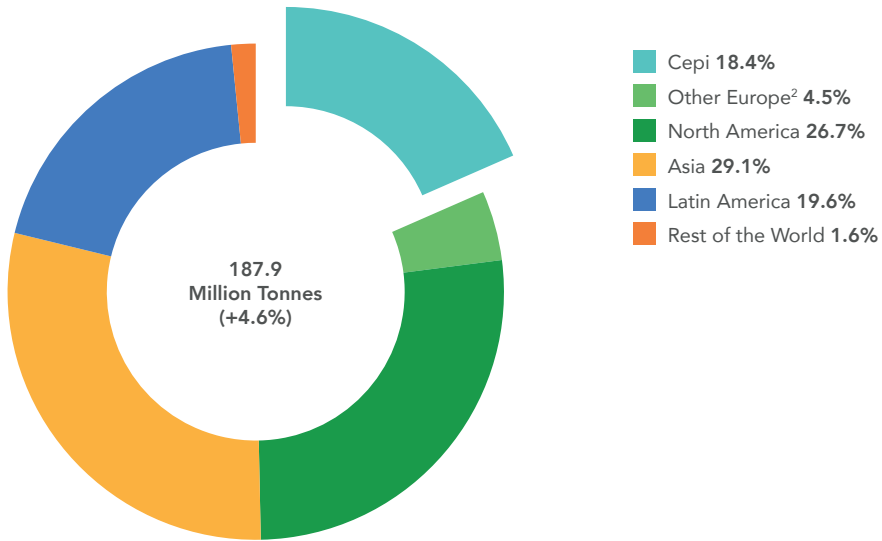


Total Pulp¹ Consumption by Grade and Market Pulp Consumption

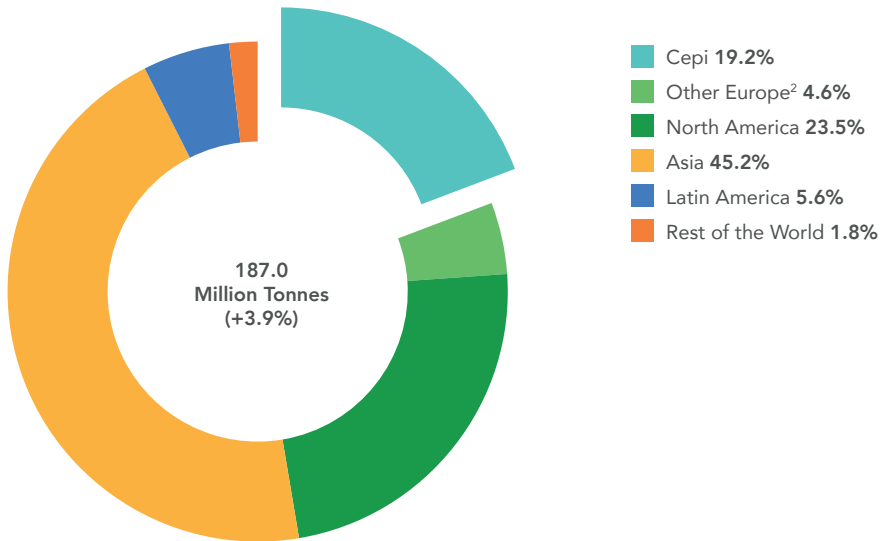


¹ Total Pulp: Integrated Pulp + Market Pulp

World Total Pulp¹ Production by Region in 2024³



World Total Pulp¹ Consumption by Region in 2024³



¹ Total Pulp: Integrated Pulp + Market Pulp

² Other Europe: total Europe excluding Cepi countries

³ Sources: Cepi, Fastmarkets.

Market Pulp Exports to Other Regions

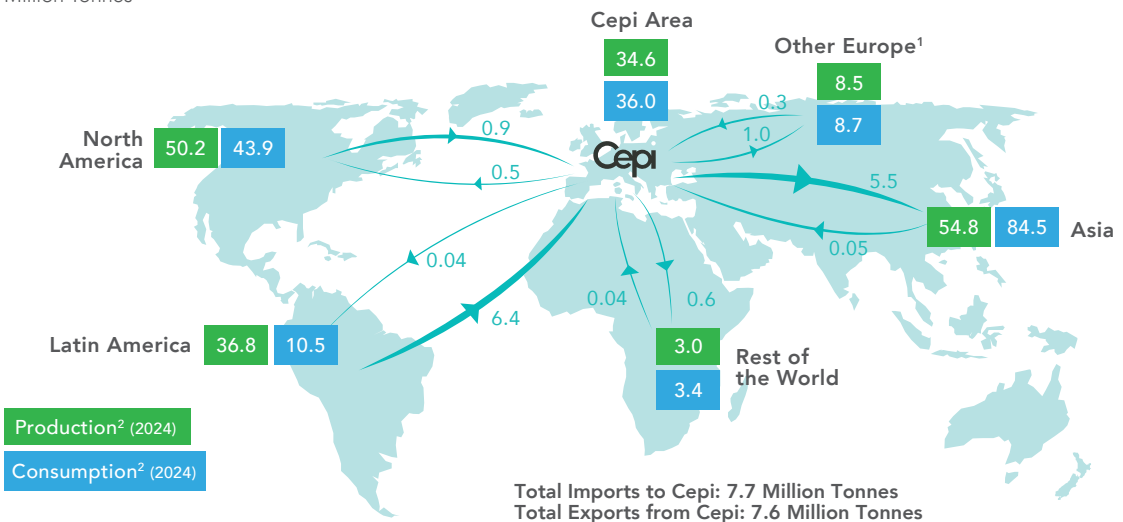
'000 Tonnes	2000	2010	2020	2024	2025	% Change 2025/2024	% Share of Total
Other Europe ¹	724	719	1 167	965	1 046	8.3	13.7
North America	104	62	266	520	523	0.5	6.8
Latin America	6	49	61	42	41	-3.5	0.5
Asia	412	1 595	4 662	4 712	5 464	16.0	71.6
Rest of the World	86	142	377	553	560	1.4	7.3
Total	1 332	2 567	6 532	6 792	7 633	12.4	100.0

Market Pulp Imports from Other Regions

'000 Tonnes	2000	2010	2020	2024	2025	% Change 2025/2024	% Share of Total
Other Europe ¹	679	499	558	427	285	-33.3	3.7
North America	4 644	2 306	1 354	1 066	922	-13.5	12.0
Latin America	1 922	4 750	6 141	6 512	6 398	-1.7	83.2
Asia	285	137	53	43	48	11.6	0.6
Rest of the World	461	86	215	88	36	-59.0	0.5
Total	7 992	7 777	8 321	8 136	7 688	-5.5	100.0

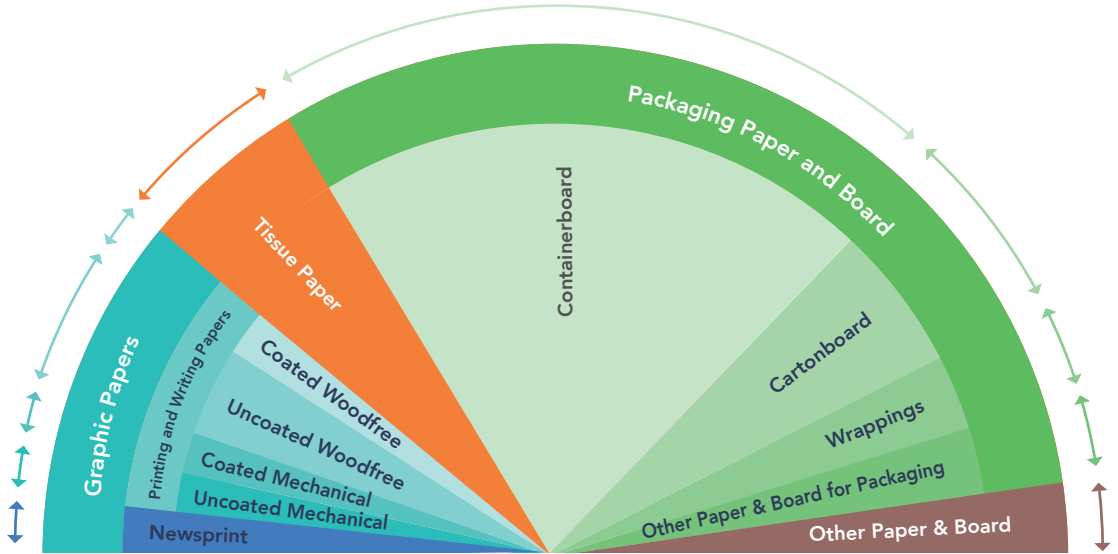
Trade Flows of Market Pulp in 2025

Million Tonnes



¹ Other Europe: total Europe excluding Cepi countries
² Production and consumption of total pulp (market and integrated).
 Source: Cepi, Fastmarkets.

Paper and Board - A Whole Range of Products for Everyday Life



Total Paper and Board Production: 77.4 Million Tonnes

MAIN USES OF PAPER AND BOARD GRADES

Graphic Papers

Newsprint - Newspapers

Uncoated Mechanical - Directories, Catalogues, Flyers, Books, Magazines, Inserts, Coupons, Tabloids

Coated Mechanical - Magazines, Catalogues, Advertising material

Uncoated Woodfree - Catalogues and brochures, Magazines (higher quality), office paper, company annual reports

Coated Woodfree - Books, Stationery, Envelopes, Greetings Cards

Tissue Paper

Toilet paper, Tissues, Kitchen towels, Hand towels, Napkins and serviettes, Industrial wipers, Clothing products, Medical products, Nappies, Feminine hygiene products

Packaging Paper and Board

Containerboard - Corrugated cases, Storage boxes, Transport packaging, Product displays

Cartonboard - Packaging for perfume, pharmaceutical products, frozen foods and cigarettes, Multipack cartons, Packaging for cosmetics, chocolate, clothing, toys and games, Packaging for cereal, dry foods, detergents, toiletries and household goods

Wrappings - Sacks, Bags, Wrappers, Greaseproof paper, Sulphite papers

Other Paper & Board for Packaging - Tubes, Toys and games, Building materials, Book and diary covers, Stiffeners

Other Paper and Board

Filter Paper, Building/roofing materials, Insulation, Cigarette paper, Wallpaper

INCLUDING 10.7 MILLION TONNES OF SPECIALITY PAPER AND BOARD

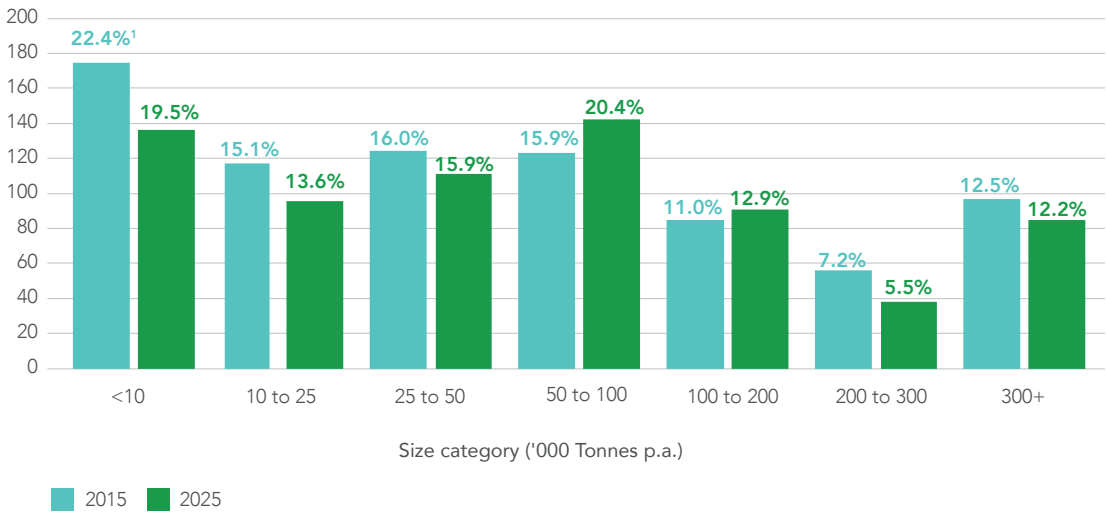
Speciality Paper and Board

Paper or board with enhanced properties (physical, optical, electrical, chemical and/or other special considerations) that are required for either the performance of the paper in a special application or to convey a visual or tactile perception of a brand.

Speciality paper and board can be found under several Cepi grades: wrappings, cartonboard, graphic papers, tissue paper and other paper and board. Europe is currently the leading speciality paper and board producing and exporting region.

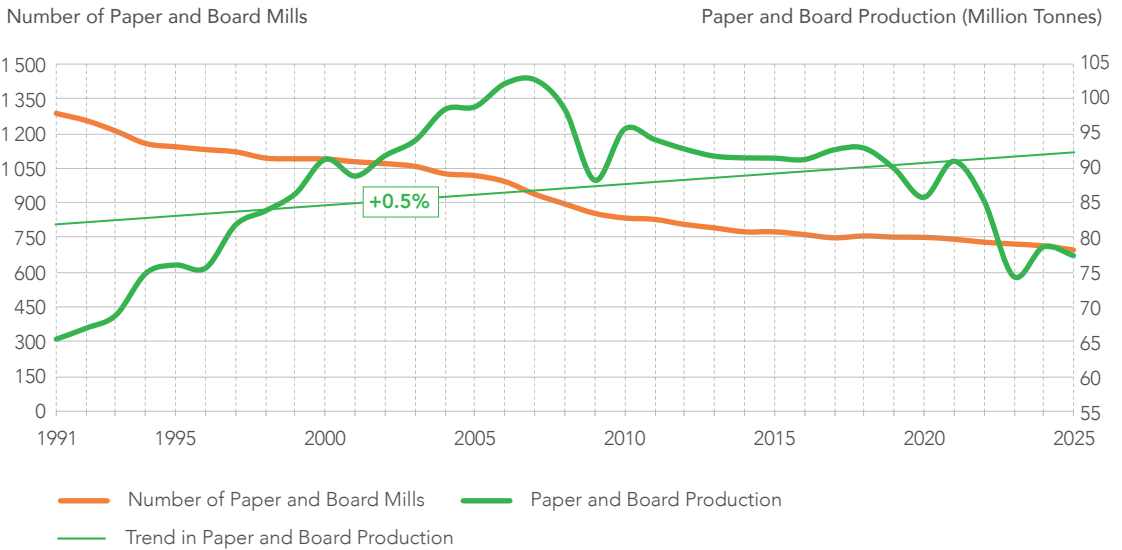
Number of Paper and Board Mills by Volume in 2015 and 2025

Number of Paper and Board Mills by Size Category



¹ Share of Total Number of Mills

Number of Paper and Board Mills and Paper and Board Production



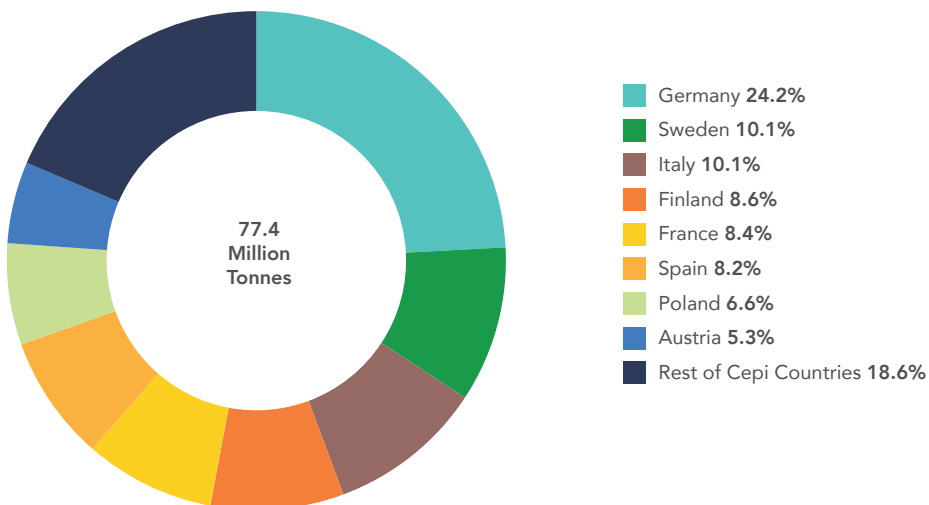
Paper and Board Production and Consumption

'000 Tonnes	Production			Apparent Consumption ²		
	2024	2025	% Change 2025/2024	2024	2025	% Change 2025/2024
Newsprint	2 720	2 521	-7.3	2 759	2 495	-9.6
Uncoated Mechanical	2 900	2 586	-10.9	2 477	2 246	-9.3
Coated Mechanical	2 642	2 358	-10.8	2 003	1 840	-8.1
Uncoated Woodfree	6 002	5 721	-4.7	5 019	4 723	-5.9
Coated Woodfree	3 080	2 888	-6.2	1 985	1 924	-3.1
Printing and Writing Papers	14 624	13 552	-7.3	11 484	10 732	-6.5
Total Graphic Papers	17 344	16 074	-7.3	14 243	13 228	-7.1
Tissue Paper	8 149	8 163	0.2	8 334	8 427	1.1
Containerboard	32 384	32 906	1.6	29 526	29 451	-0.3
Cartonboard	8 948	8 466	-5.4	6 163	5 841	-5.2
Wrappings	4 340	4 385	1.0	2 958	3 023	2.2
Other Paper and Board for Packaging	3 902	3 752	-3.8	3 532	3 426	-3.0
Total Packaging Paper and Board	49 574	49 509	-0.1	42 180	41 740	-1.0
Other Paper and Board	3 563	3 619	1.6	3 366	3 410	1.3
Total Paper and Board	78 630	77 365	-1.6	68 123	66 805	-1.9
Including Speciality Paper and Board¹	10 574	10 696	1.2			

¹ Speciality paper and board: paper or board with enhanced properties (physical, optical, electrical, chemical and/or other special considerations) that are required for either the performance of the paper in a special application or to convey a visual or tactile perception of a brand. Source: Smithers.

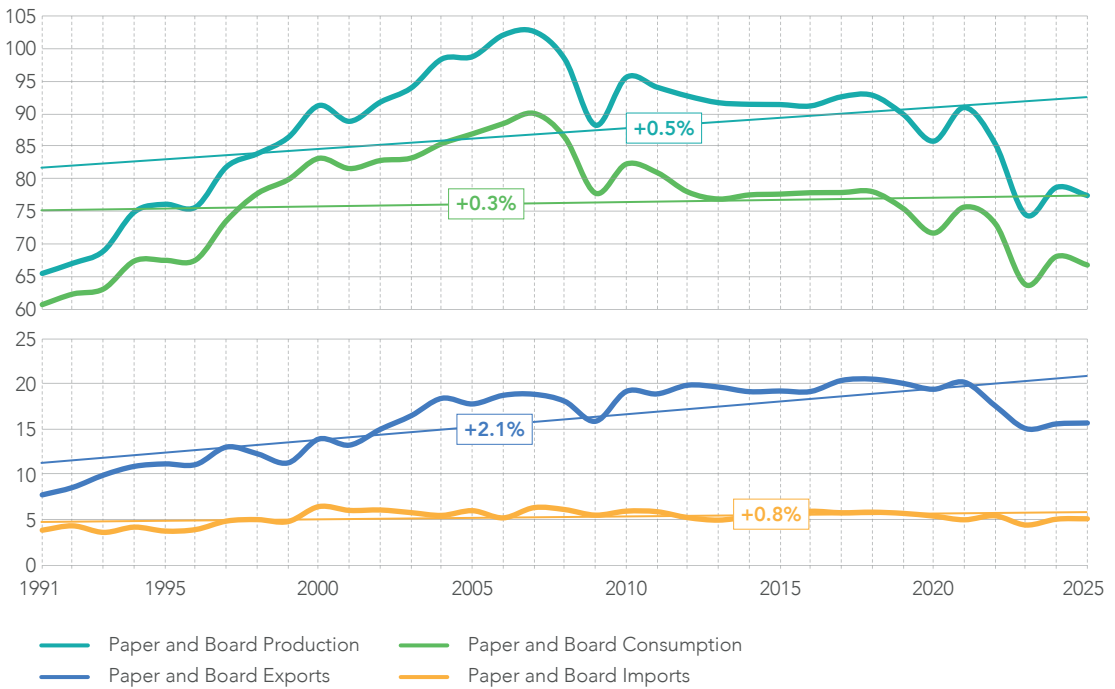
² Total Cepi Consumption: production - exports to outside Cepi + imports from outside Cepi

Paper and Board Production by Country in 2025

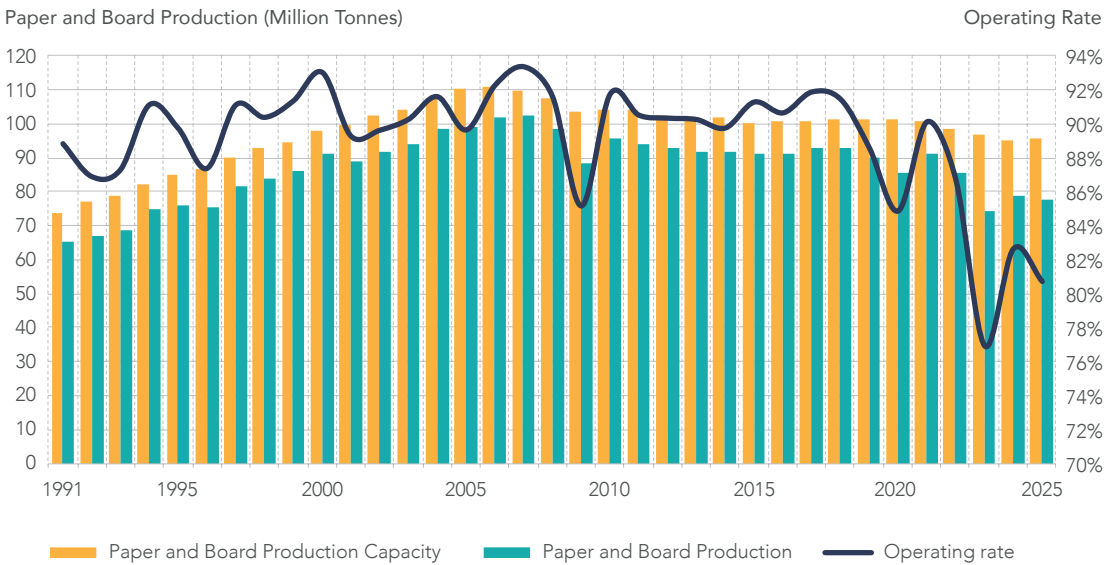


Paper and Board Production, Trade and Consumption

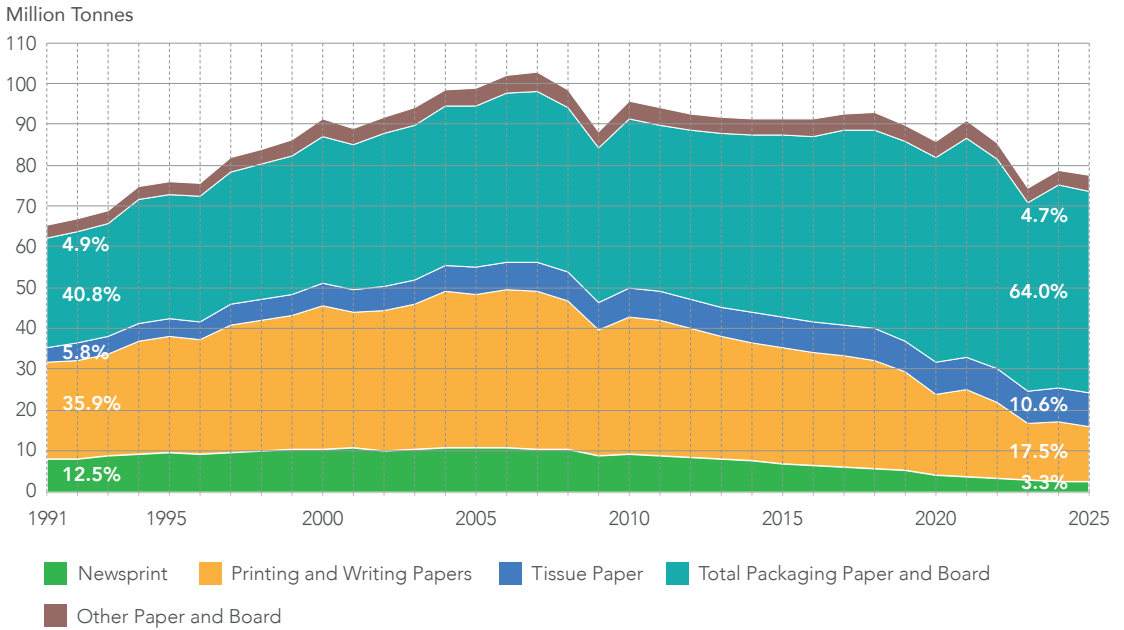
Million Tonnes



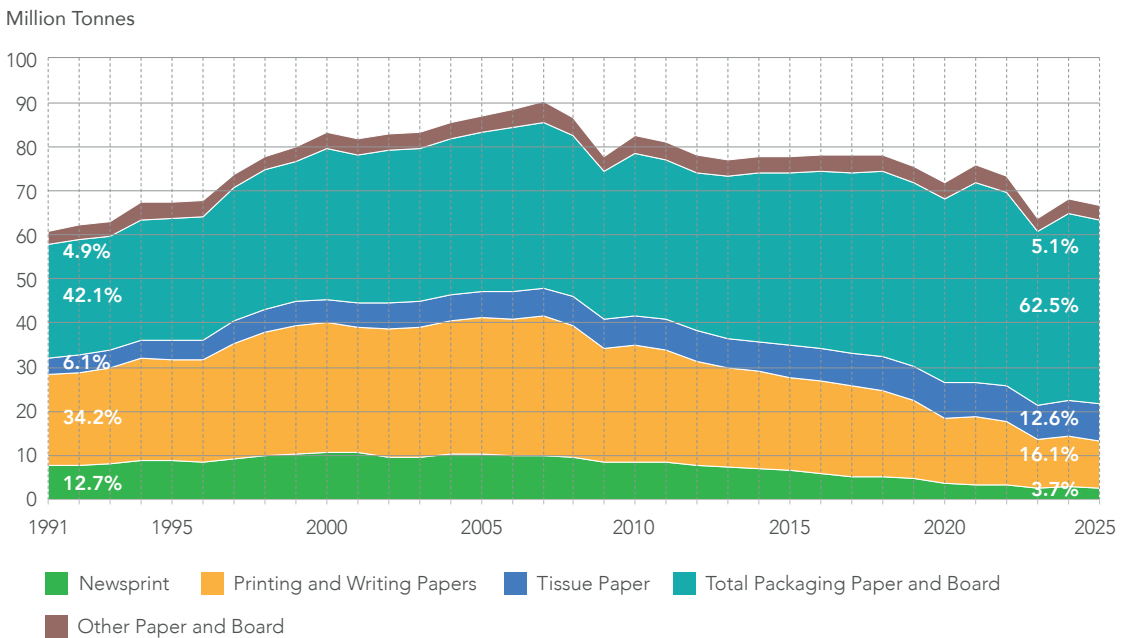
Paper and Board Production and Capacity



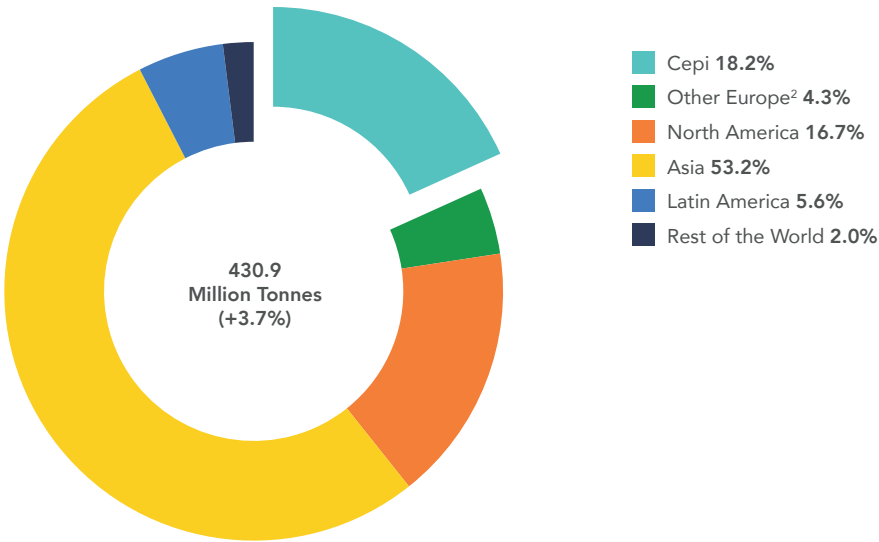
Paper and Board Production by Grade



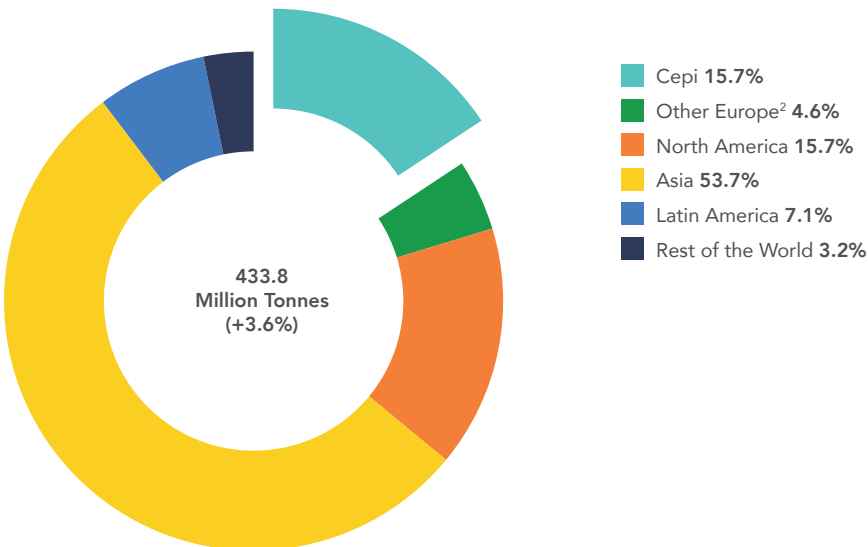
Paper and Board Consumption by Grade



Paper and Board Production by Region in 2024¹



Paper and Board Consumption by Region in 2024¹



¹ Sources: Cepi, Fastmarkets.

² Other Europe: total Europe excluding Cepi countries.

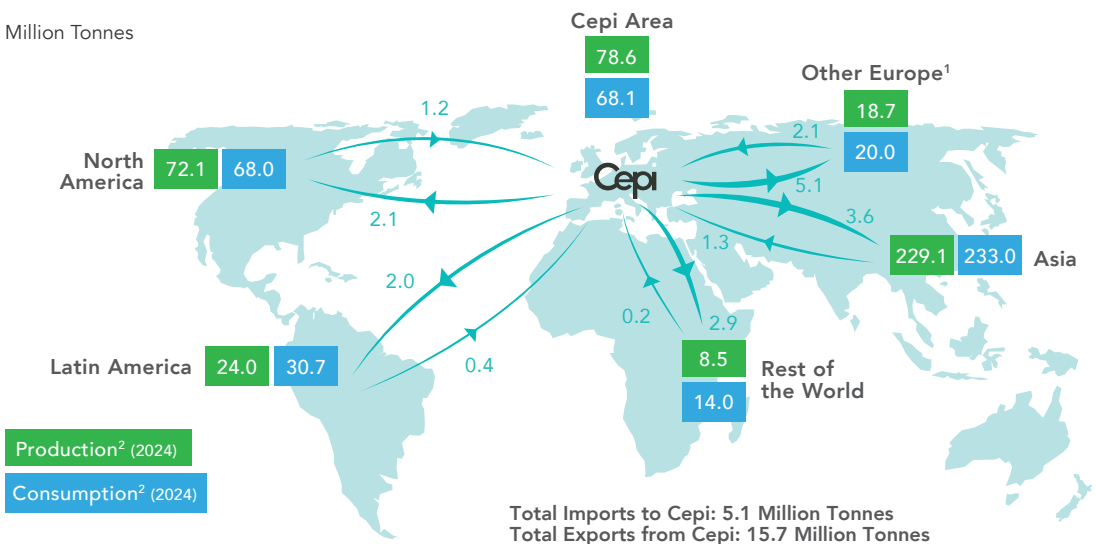
Paper and Board Exports to Other Regions

'000 Tonnes	2000	2010	2020	2024	2025	% Change 2025/2024	% Share of Total
Other Europe ¹	6 120	7 391	7 207	5 180	5 082	-1.9	32.4
North America	2 283	2 055	2 160	2 071	2 124	2.5	13.5
Latin America	874	1 879	1 604	1 674	1 976	18.0	12.6
Asia	2 934	5 115	5 513	3 886	3 590	-7.6	22.9
Rest of the World	1 708	2 792	2 990	2 800	2 937	4.9	18.7
Total	13 919	19 231	19 474	15 612	15 708	0.6	100.0

Paper and Board Imports from Other Regions

'000 Tonnes	2000	2010	2020	2024	2025	% Change 2025/2024	% Share of Total
Other Europe ¹	3 362	2 655	2 618	2 117	2 107	-0.5	40.9
North America	2 227	1 866	1 541	1 264	1 186	-6.2	23.0
Latin America	202	500	351	316	367	16.0	7.1
Asia	343	651	762	1 253	1 327	5.9	25.8
Rest of the World	356	314	171	154	161	4.3	3.1
Total	6 491	5 987	5 442	5 105	5 148	0.8	100.0

Trade Flows of Paper and Board in 2025



¹Other Europe: total Europe excluding Cepi countries.

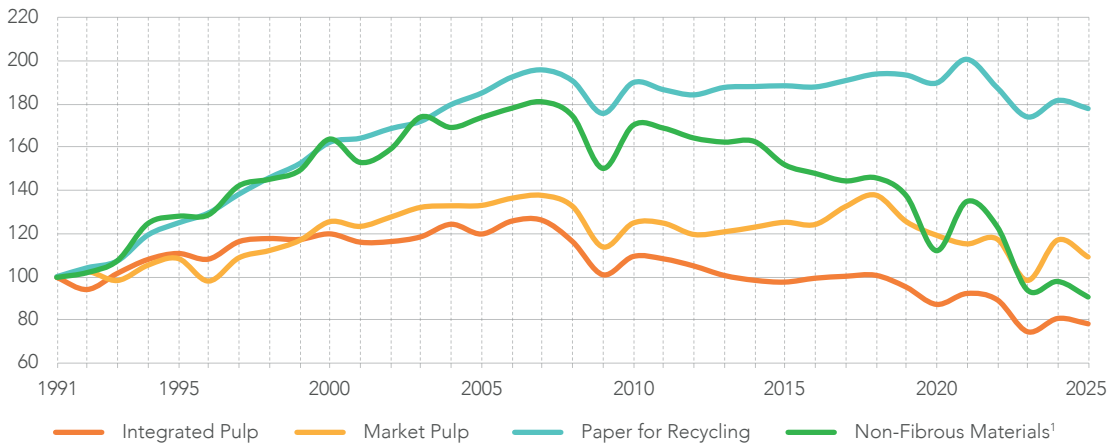
²Source: Cepi, Fastmarkets.

Raw Materials Consumption

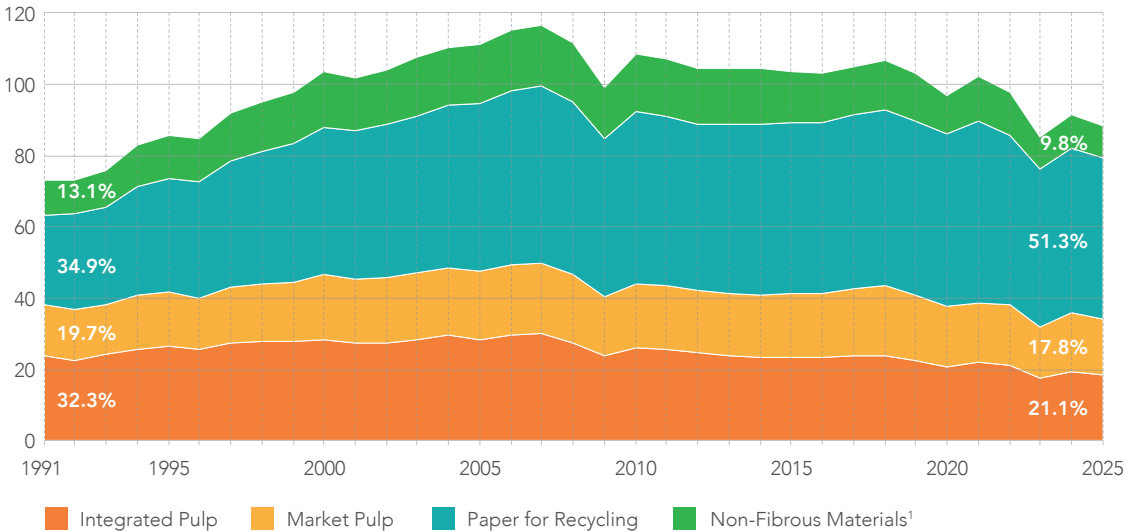
'000 Tonnes	1991	2000	2010	2020	2024	2025	% Change 2025/2024	% Share of Total
Integrated Pulp	23 687	28 475	25 989	20 728	19 182	18 598	-3.0	21.1
Market Pulp	14 332	18 015	17 916	17 110	16 794	15 665	-6.7	17.8
Paper for Recycling	25 476	41 308	48 325	48 280	46 228	45 275	-2.1	51.3
Non-Fibrous Materials ¹	9 521	15 626	16 235	10 701	9 341	8 655	-7.3	9.8
Total Raw Materials	73 016	103 424	108 465	96 819	91 546	88 193	-3.7	100.0

Raw Materials Consumption

Index (1991 = 100)






Million Tonnes



¹ See Definition page 33.

Wood Consumption

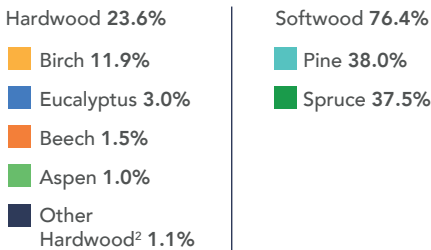
'000 m ³	1991	2000	2010	2020	2024	2025	% Change 2025/2024	% Share of Total
Softwood Roundwood	65 240	72 372	76 641	71 963	76 319	76 788	0.6	54.0
Softwood Chips 	24 623	35 673	34 141	34 360	31 315	31 854	1.7	22.4
Total Softwood	89 863	108 046	110 782	106 323	107 634	108 642	0.9	76.4
Hardwood Roundwood	28 963	38 542	36 635	38 892	31 504	31 862	1.1	22.4
Hardwood Chips 	1 447	1 505	1 483	1 301	2 057	1 622	-21.2	1.1
Total Hardwood	30 410	40 048	38 119	40 192	33 561	33 483	-0.2	23.6
Total Roundwood	94 204	110 915	113 276	110 854	107 823	108 649	0.8	76.4
Total Chips 	26 070	37 179	35 625	35 661	33 372	33 476	0.3	23.6
Total Wood	120 274	148 093	148 901	146 515	141 195	142 125	0.7	100.0



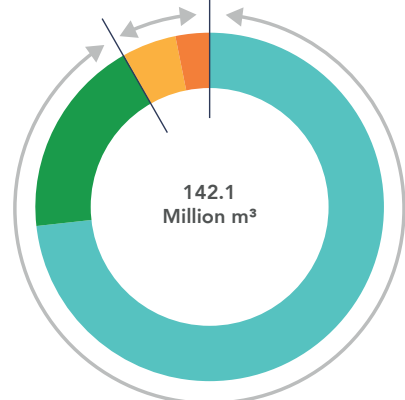
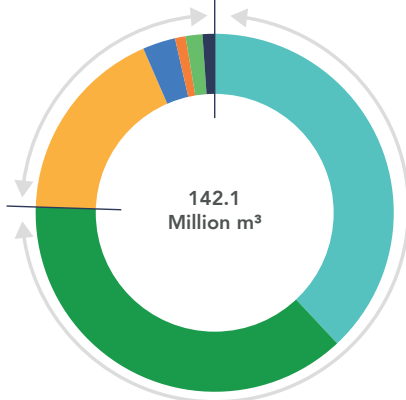
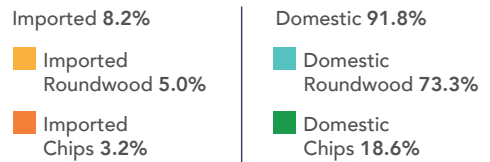
Woodchips used to produce pulp are residues from sawmills and woodworking industry, and are in fact an important contribution to circular economy through industrial symbiosis, although traditionally not reported by Cepi as recycling.

Share in Wood Consumption in 2025

By Species¹



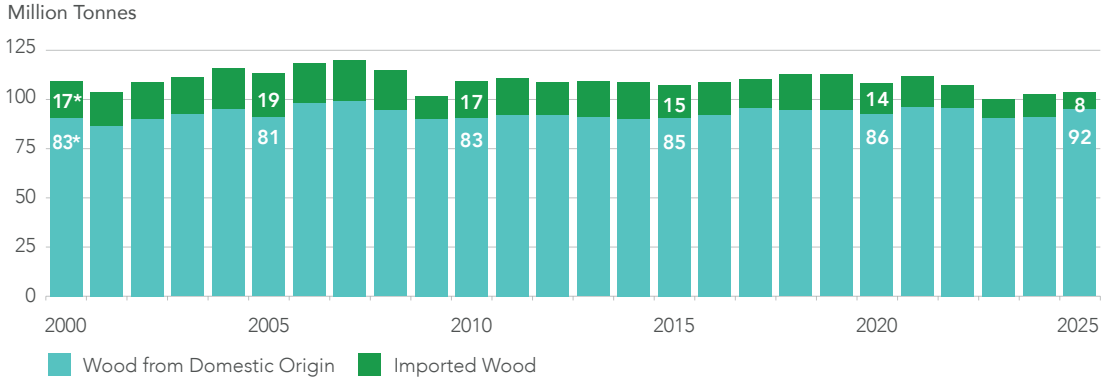
By Origin



¹ Based on a sample representing 90% of total Cepi consumption

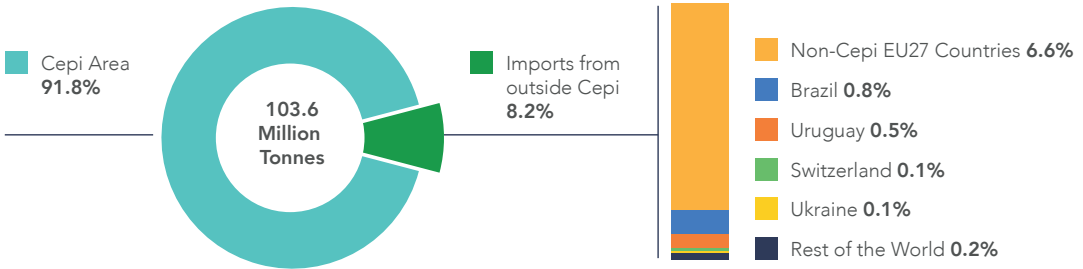
² Other Hardwood: hornbeam, ash, maple, accacia, quercus-cerris, oak, alder, poplar, willow, chesnut.

Wood Consumption by Origin

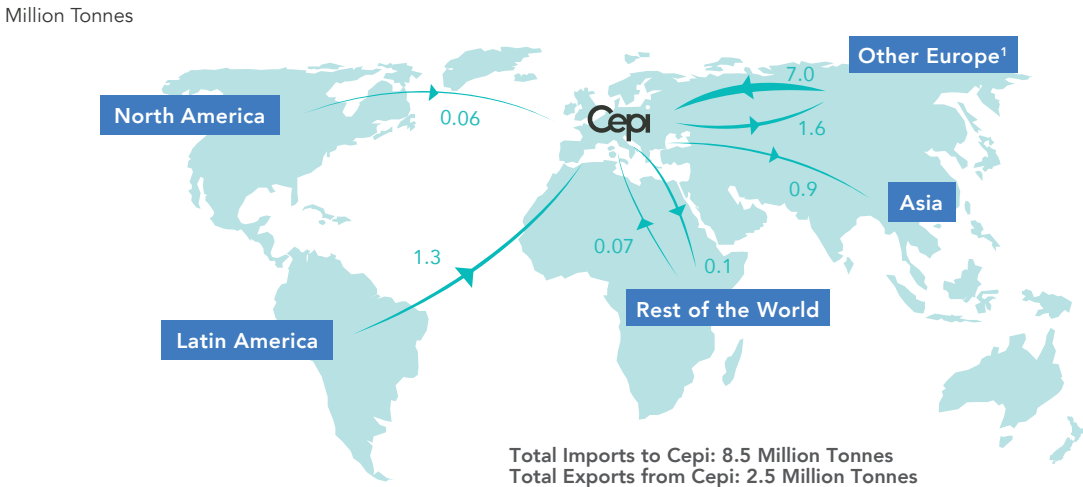


*Percentage of total wood consumption

Origin of Wood Consumption in 2025



Trade Flows of Wood in 2025



Source: Eurostat
¹Other Europe: total Europe excluding Cepi countries

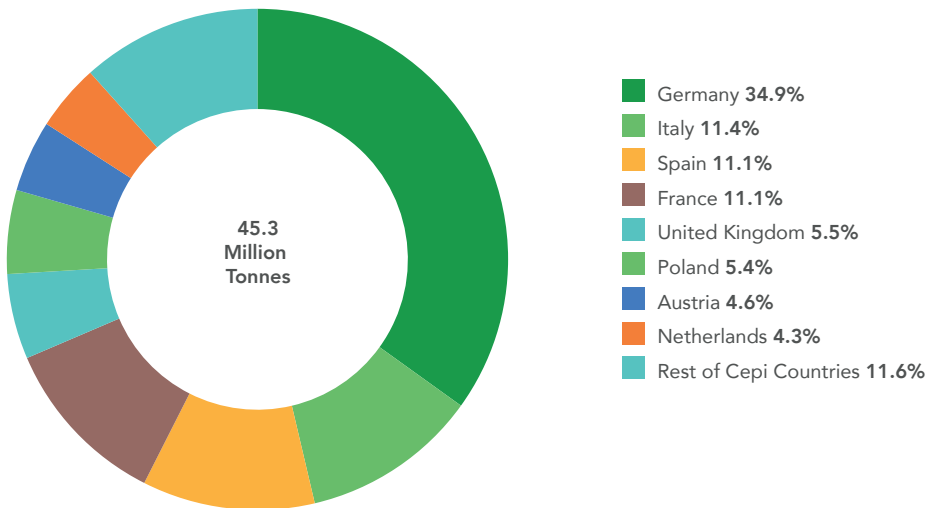
Utilisation of Paper for Recycling by Paper and Board Sector in 2025

Grades of Paper for Recycling

'000 Tonnes	A	B	C	D	E	F	G	E/G
Paper and Board Sector	Mixed Grades	Corrugated and Kraft	Newspapers & Magazines	Other Grades	Total Use of Paper for Recycling	Utilisation by Sector¹ %	Total P&B Production	Utilisation Rate² %
Newspprint	0	81	2 001	33	2 115	4.7	2 521	83.9
Printing and Writing Papers	16	9	1 374	394	1 793	4.0	13 552	13.2
Total Graphic Papers	16	91	3 375	427	3 908	8.6	16 074	24.3
Tissue Paper	304	276	322	1 171	2 074	4.6	8 163	25.4
Containerboard	4 046	25 728	219	1 073	31 066	68.6	32 906	94.4
Cartonboard	1 413	1 205	42	556	3 215	7.1	8 466	38.0
Wrappings & Other Packaging	1 504	1 695	113	202	3 514	7.8	8 137	43.2
Total Packaging Paper and Board	6 963	28 628	374	1 830	37 794	83.5	49 509	76.3
Other Paper and Board	276	1 004	9	210	1 499	3.3	3 619	41.4
Total Paper and board	7 559	29 998	4 079	3 639	45 275	100.0	77 365	58.5
Share of Total	16.7%	66.3%	9.0%	8.0%	100.0%			

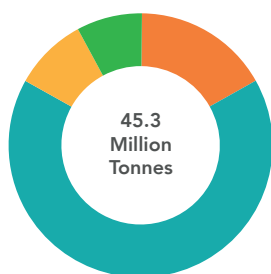
¹ Utilisation by paper and board sector: total use of paper for recycling in a sector as % of the total paper for recycling used by the industry
² Utilisation rate: use of paper for recycling in a sector as % of total paper & board production in that sector

Utilisation of Paper for Recycling by Country in 2025



Utilisation of Paper for Recycling by Grade

'000 Tonnes	1991	2000	2010	2020	2024	2025	% Change 2025/2024	% Share of Total
Mixed Grades	5 459	8 731	9 198	9 386	7 740	7 559	-2.3	16.7
Corrugated and Kraft	10 586	16 542	21 144	27 285	29 739	29 998	0.9	66.3
Newspapers and Magazines	5 884	10 928	12 451	6 887	4 774	4 079	-14.5	9.0
Other Grades	3 547	5 107	5 533	4 722	3 975	3 639	-8.5	8.0
Total Paper for Recycling	25 476	41 308	48 325	48 280	46 228	45 275	-2.1	100.0

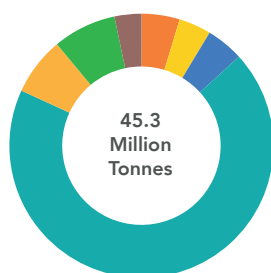


Utilisation by Grade in 2025

- Mixed Grades 16.7%
- Corrugated and Kraft 66.3%
- Newspapers and Magazines 9.0%
- Other Grades 8.0%

Utilisation of Paper for Recycling by Paper and Board Sector

'000 Tonnes	2000	2010	2020	2024	2025	% Change 2025/2024	% Share of Total
Newsprint	7 105	8 634	3 780	2 384	2 115	-11.3	4.7
Printing and Writing Papers	2 544	3 465	2 781	2 282	1 793	-21.4	4.0
Tissue Paper	3 620	3 297	2 709	2 238	2 074	-7.3	4.6
Containerboard	18 217	23 189	29 544	30 677	31 066	1.3	68.6
Cartonboard	3 843	3 883	3 480	3 577	3 215	-10.1	7.1
Wrappings and Other P&B for Packaging	4 058	4 199	4 545	3 528	3 514	-0.4	7.8
Other Paper and Board	1 921	1 658	1 440	1 534	1 491	-2.8	3.3
Total Paper for Recycling	41 308	48 325	48 280	46 228	45 275	-2.1	100.0

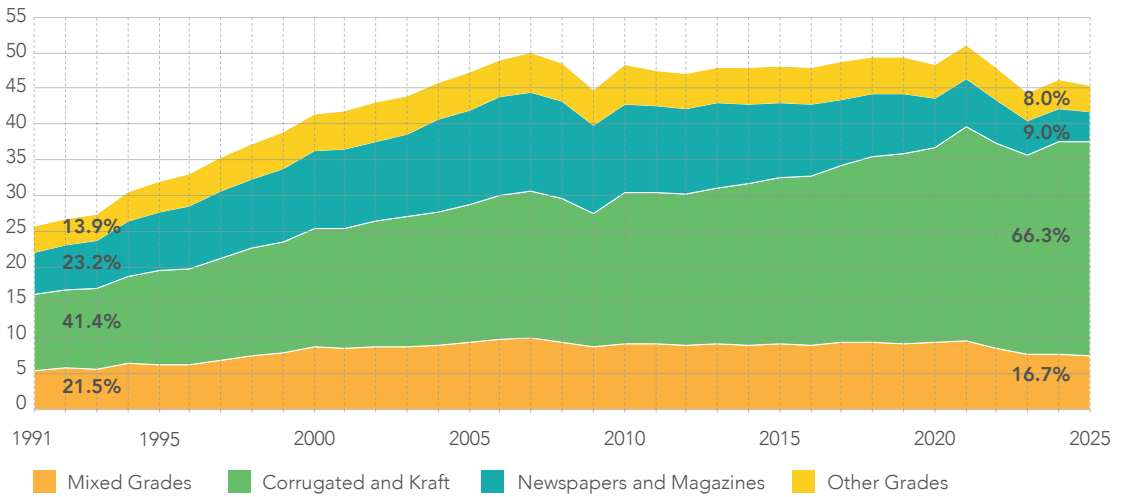


Utilisation by Paper and Board Sector in 2025

- Newsprint 4.7%
- Printing and Writing Papers 4.0%
- Tissue Paper 4.6%
- Containerboard 68.6%
- Cartonboard 7.1%
- Wrappings and Other P&B for Packaging 7.8%
- Other Paper and Board 3.3%

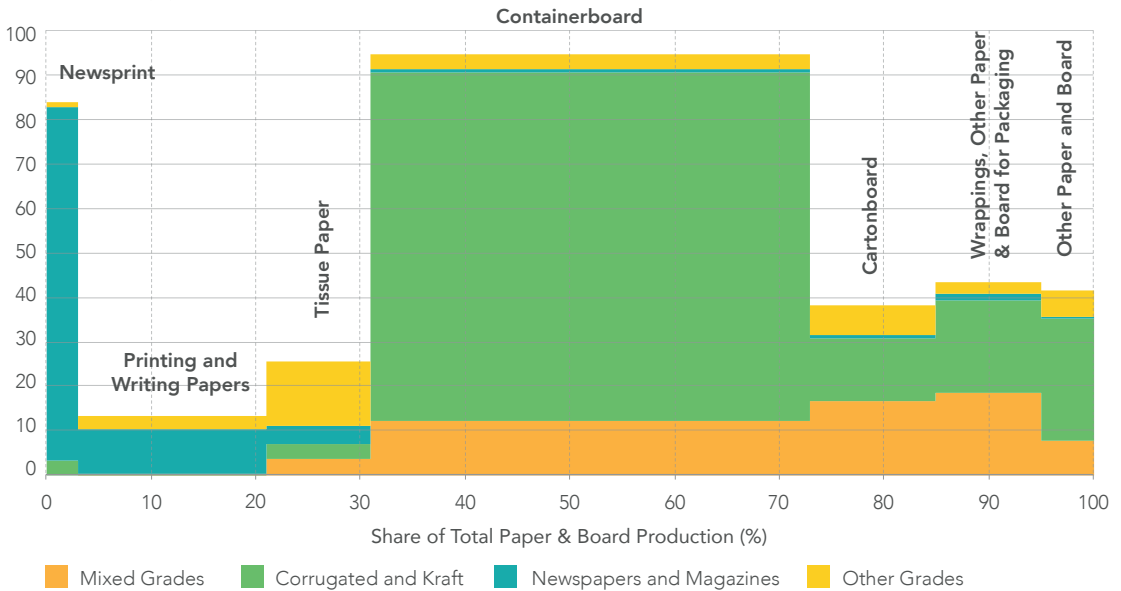
Utilisation of Paper for Recycling by Grade

Million Tonnes



Utilisation of Paper for Recycling by Paper and Board Sector in 2025

Utilisation Rate (%)

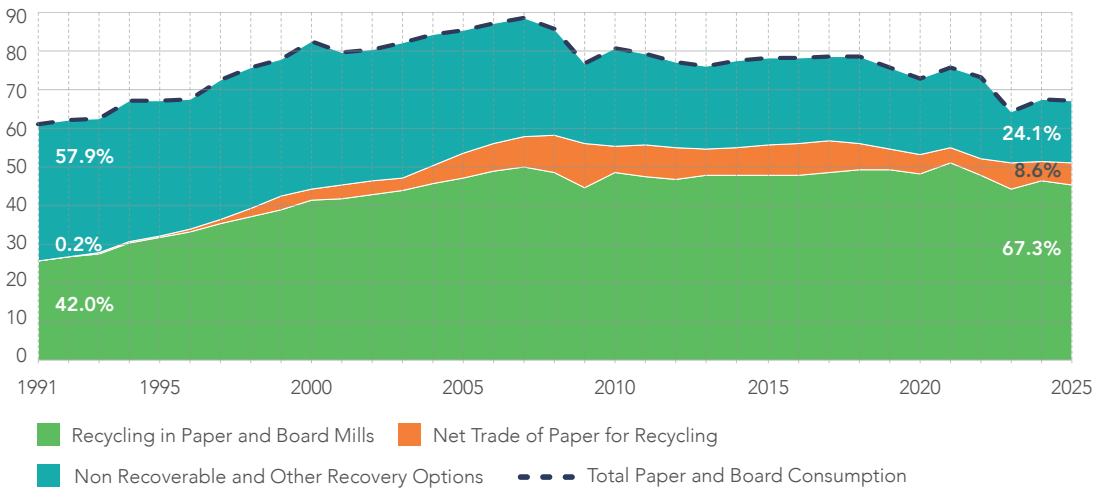


For instance: containerboard represent 43% of total paper and board production, have an utilisation rate of 94% and use 69% of total paper for recycling volumes used by the industry.

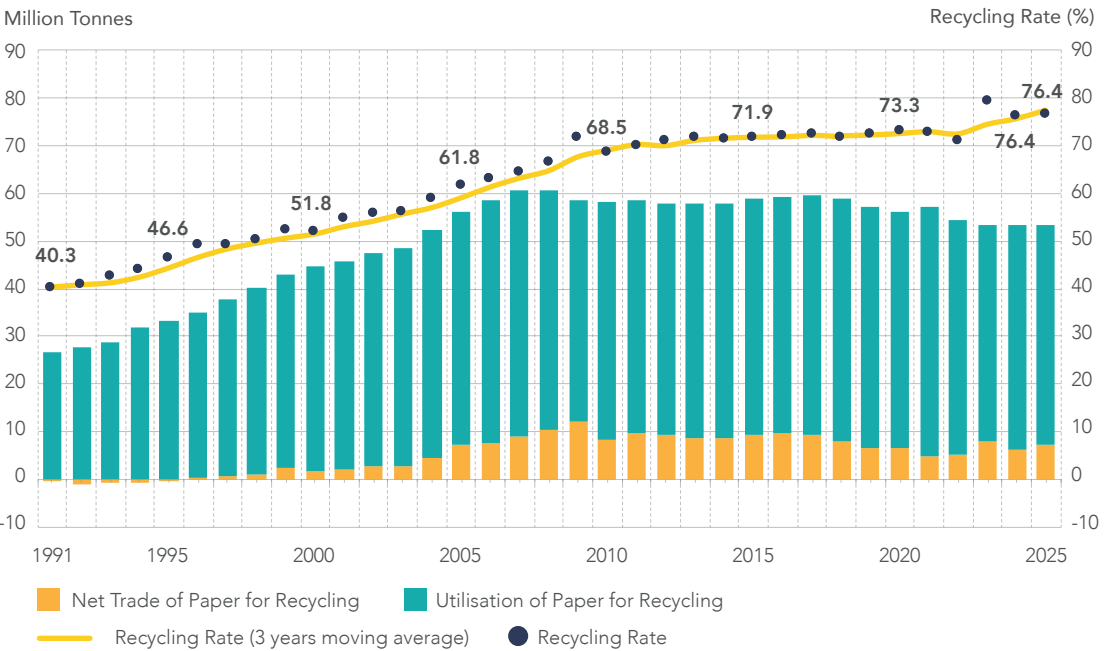
Important Note: Paper for recycling is composed of fibres but also unusable materials - non-paper components as well as paper and board detrimental to production. The share of unusable materials depends on the actual sorting and collection of used paper. It varies according to grades of paper for recycling and countries. The volume of recycled fibres actually used to produce new paper is therefore lower than the volume of paper for recycling considered. The utilisation rate compares utilisation of paper for recycling to paper & board production.

Paper and Board Consumption and Recycling

Million Tonnes



Utilisation, Net Trade and Recycling Rate¹ of Paper for Recycling in Europe²



¹ Recycling Rate: Utilisation of Paper for Recycling + Net Trade of Paper for Recycling, compared to Paper and Board Consumption

The European recycling rate stood at 76.4% in 2025, remaining unchanged compared to 2024. Looking at a three year rolling average and the long term trend, the 2025 rate confirms the paper recycling value chain is on track to reach its target of 76% paper recycling rate by 2030.

² Europe: EU-27 countries plus Norway, Switzerland and the United Kingdom

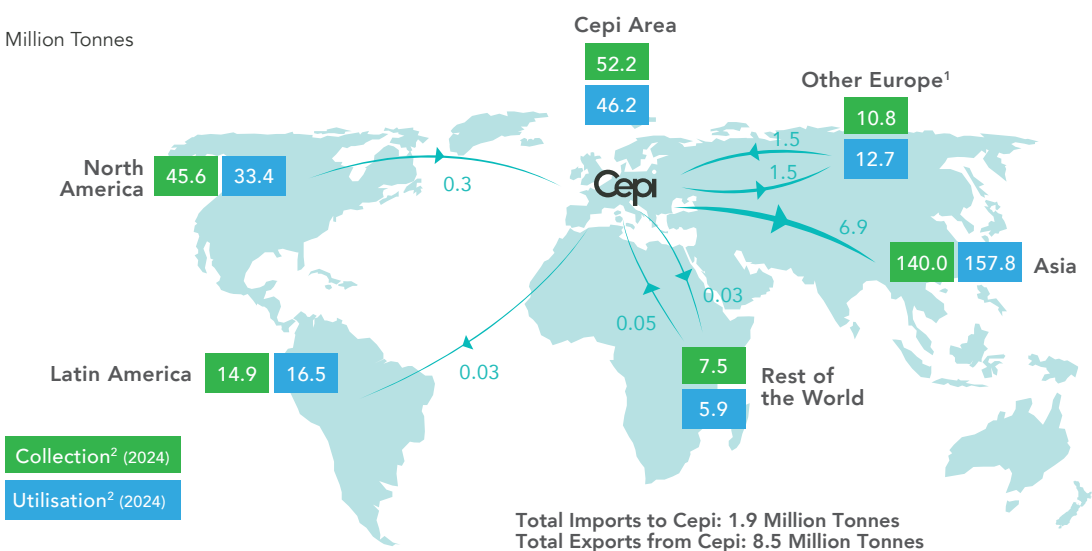
Exports of Paper for Recycling to Other Regions

'000 Tonnes	2000	2010	2020	2024	2025	% Change 2025/2024	% Share of Total
Other Europe ¹	720	458	1 813	1 333	1 516	13.7	17.8
North America	47	27	2	1	1	-18.7	0.0
Latin America	7	21	43	31	35	10.9	0.4
Asia	2 894	9 355	6 806	6 418	6 926	7.9	81.4
Rest of the World	127	14	16	40	31	-23.3	0.4
Total	3 795	9 875	8 679	7 824	8 509	8.8	100.0

Imports of Paper for Recycling from Other Regions

'000 Tonnes	2000	2010	2020	2024	2025	% Change 2025/2024	% Share of Total
Other Europe ¹	738	1 598	1 487	1 547	1 529	-1.2	81.4
North America	266	184	323	266	291	9.6	15.5
Latin America	0	3	11	18	7	-58.1	0.4
Asia	10	6	10	11	4	-59.8	0.2
Rest of the World	7	8	30	30	46	55.3	2.5
Total	1 021	1 799	1 862	1 871	1 878	0.4	100.0

Trade Flows of Paper for Recycling in 2025



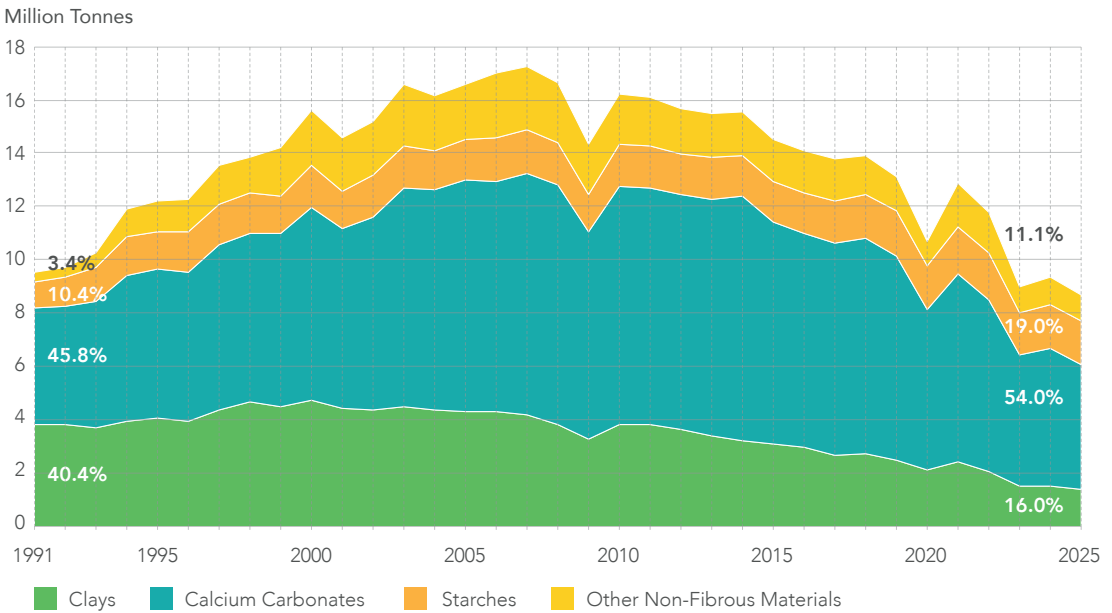
¹ Other Europe: total Europe excluding Cepi countries

² Source: Cepi, Fastmarkets.

Non-Fibrous Materials¹ Consumption


'000 Tonnes	1991	2000	2010	2020	2024	2025	% Change 2025/2024	% Share of Total
Clays (coating and filler)	3 842	4 719	3 828	2 081	1 494	1 384	-7.3	16.0
Calcium Carbonates (coating and filler)	4 349	7 250	8 906	6 044	5 172	4 670	-9.7	54.0
Starches (native and modified)	989	1 561	1 603	1 619	1 665	1 644	-1.2	19.0
Other Non-Fibrous Materials	341	2 095	1 897	957	1 011	957	-5.3	11.1
Non Fibrous Materials	9 521	15 626	16 235	10 701	9 341	8 655	-7.3	100.0

Non-Fibrous Materials¹ Consumption



¹ See Definition page 33.

Primary Energy and Electricity Consumption¹

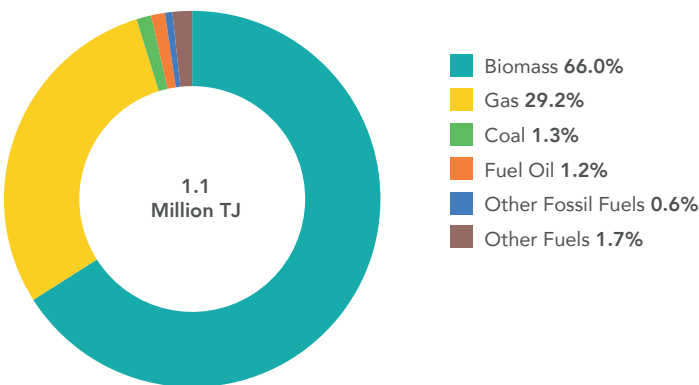
Primary Energy Consumption TJ	1991	2000	2010	2020	2023	2024	% Change 2024/2023	% Share of Total ²
Gas	259 593	404 946	489 565	373 840	298 712	310 636	4.0	25.9
Fuel Oil	129 461	90 914	37 856	17 292	17 703	12 586	-28.9	1.0
Coal	113 867	59 304	53 280	31 930	16 103	13 525	-16.0	1.1
Other Fossil Fuels	10 134	19 052	14 529	8 925	7 405	6 794	-8.3	0.6
Biomass 	413 248	562 865	677 569	694 243	680 962	701 438	3.0	58.4
Others	3 560	4 151	8 948	23 116	19 085	17 873	-6.3	1.5
Total Fuels Consumption	929 863	1 141 232	1 281 746	1 149 346	1 039 970	1 062 852	2.2	88.5
Net Bought Electricity	205 852	246 864	202 945	148 251	123 659	137 981	11.6	11.5
Total Primary Energy Consumption	1 135 715	1 388 096	1 484 691	1 297 596	1 163 629	1 200 833	3.2	100.0
Fraction of Biomass in Total Fuels Consumption	44.4%	49.3%	52.9%	60.4%	65.5%	66.0%	0.5	

Electricity Consumption GWh	1991	2000	2010	2020	2023	2024	% Change 2024/2023	% Share of Total
Total Electricity Produced at Site	29 416	41 930	56 780	49 900	42 257	43 328	2.5	53.1
Purchased Electricity	59 045	72 255	67 567	52 485	44 008	47 213	7.3	57.8
Sold Electricity	-1 864	-3 681	-11 193	-11 305	-9 659	-8 885	-8.0	10.9
Total Electricity Consumption	86 597	110 504	113 153	91 081	76 606	81 656	6.6	100.0
% of Electricity produced through CHP ³	88.0%	90.4%	95.4%	95.7%	95.4%	95.7%	0.2	



In 2024, 66% of fuels used in the pulp and paper industry came from biomass; large amount of that is process residues.

Fuels Consumption in 2024¹



¹ Excluding Greece, Hungary, Romania and Slovenia - excluding Poland before 2003.

² Share of total primary energy consumption (including net bought electricity).

³ CHP: combined heat and power (compared to total on-site electricity generation).

Key Figures on Energy and Environment¹

	1991	2000	2010	2020	2023	2024	% Change 2024/2023	% Change 2024/1991
Energy Consumption								
Production of Market Pulp and Paper & Board ('000 Tonnes)	71 971	98 691	106 084	98 098	86 116	90 356	4.9	25.5
Specific Primary Energy Consumption (Tj/kt)	15.78	14.07	14.00	13.23	13.51	13.29	-1.6	-15.8
Specific Electricity Consumption (GWh/kt)	1.20	1.12	1.07	0.93	0.89	0.90	1.6	-24.8
Direct CO₂ Emissions²								
Absolute (Mega Tonnes)	39.05	41.94	37.99	26.96	22.90	22.53	-1.6	-42.3
Specific (kt CO ₂ / kt of product)	0.54	0.42	0.35	0.27	0.26	0.24	-6.7	-55.9
Indirect CO₂ Emissions³								
Absolute (Mega Tonnes)	13.88	14.33	11.59	8.27	8.80	8.65	-1.8	-37.7
Specific (kt CO ₂ / kt of product)	0.19	0.15	0.11	0.08	0.10	0.10	-6.4	-50.4
Water Specific Emissions								
COD (kg / T of product)	23.36	9.08	6.32	5.34	5.05	4.91	-2.8	-79.0
AOX (kg / T of product)	0.433	0.049	0.030	0.023	0.021	0.020	-4.2	-95.3
Air Specific Emissions								
SO ₂ (kg S / T of product)	1.32	0.40	0.24	0.10	0.07	0.07	-5.9	-95.0
NOx (kg NOx / T of product)	1.31	0.90	0.85	0.66	0.65	0.62	-5.4	-52.7

¹ Excluding Greece, Hungary, Romania & Slovenia - excluding Poland before 2003.

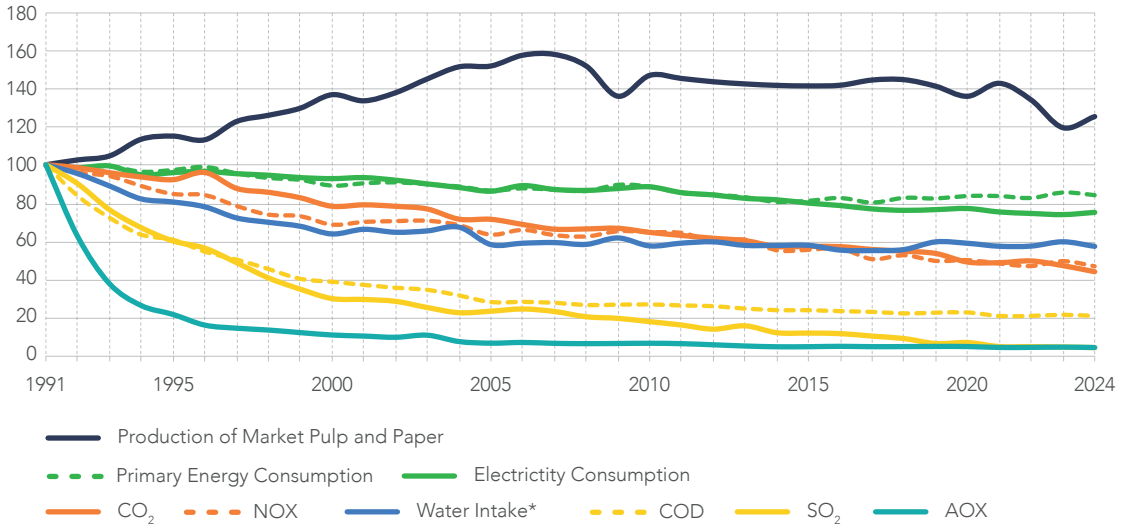
² Including all Cepi countries from 2005.

Direct CO₂ Emissions: fossil emissions produced by the pulp and paper mills and connected energy plants.

³ Indirect CO₂ emissions: CO₂ emissions from net bought electricity, calculated as "net bought electricity" multiplied by the "electricity emissions factor" applied in each country.

Evolution of Environmental Impacts¹

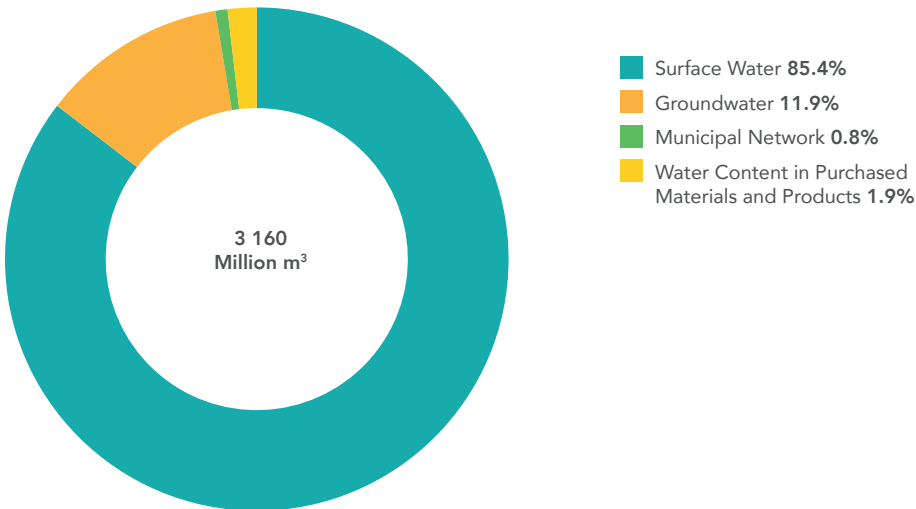
Index of Specific Values (1991 = 100)



Water Emissions: COD (Chemical Oxygen Demand) - AOX
 Air Emissions: CO₂ - NOX (Azote Oxydes) - SO₂

*Water Intake: Due to the change in data collection system in one country, 2019 data on water can't be compared to 2018 data.

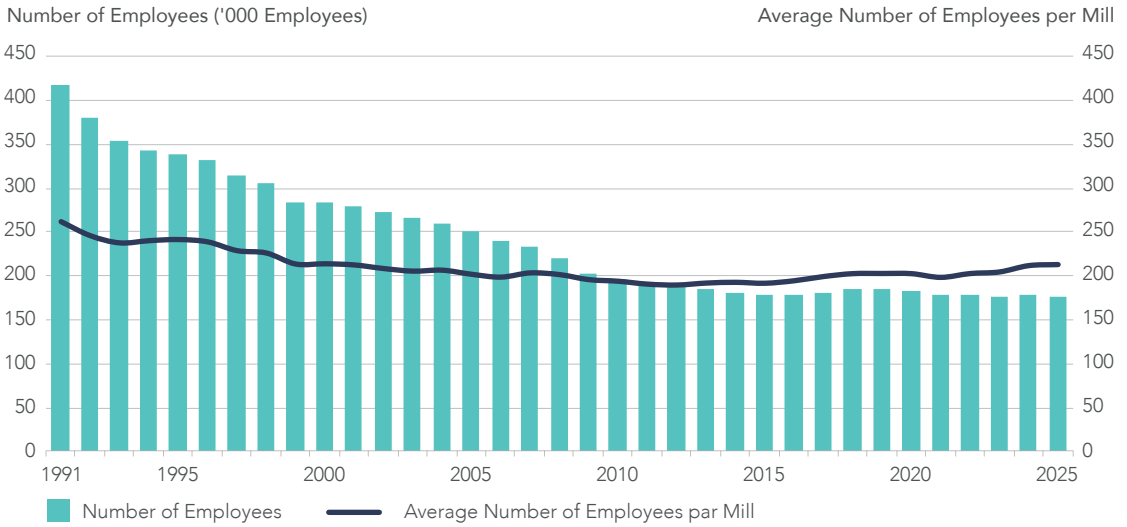
Sources of Water Intake in 2024¹



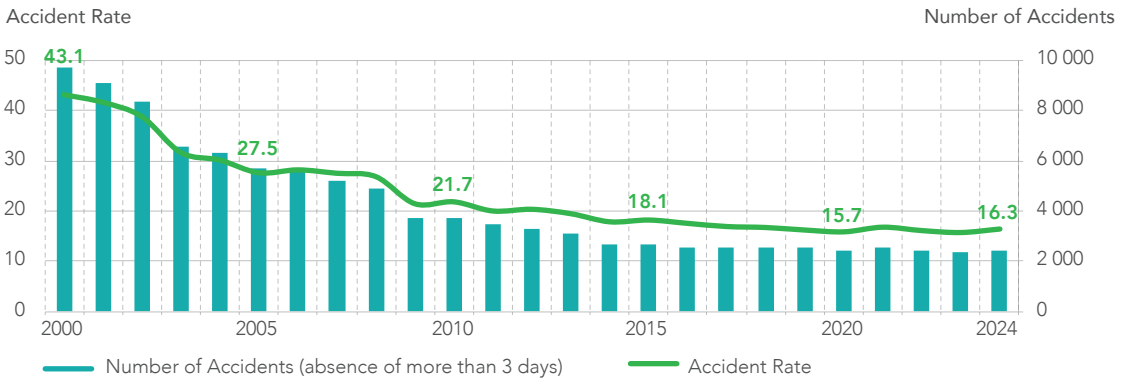
 In 2024, around 90% of water abstracted to produce paper and board has been returned to its source after treatment.

¹ Excluding Greece, Hungary, Romania and Slovenia - excluding Poland before 2003.

Employment Evolution



Accident Rate¹



¹ Accident rate: Number of accidents (fatal and non-fatal) x 1000/number of employees (absence of more than 3 days)
 Include Austria, Finland, France, Germany, Italy, Netherlands, Norway, Portugal, Spain, Sweden, United Kingdom

Pulp

Pulp Consumption: Production + Imports from outside Cepi - Exports to outside Cepi.

Integrated Pulp Production: Integrated pulp is produced for use as raw material in the production of paper at the same mill, or for shipment by a producing mill to other mills, which it owns, controls or with which it is affiliated within the same country and therefore not sold on the open market.

Pulp Grades

Mechanical - Stone groundwood: pulp produced by grinding wood into relatively short fibres. Cepi Harmonised Code is 923 000 000.

Semi-chemical: pulp produced in a two-stage process which involves partial digestion with chemicals, followed by mechanical treatment in a disc refiner. Cepi Harmonised Code is 921 000 000.

Chemical - Sulphite: pulp produced by cooking wood chips in a pressure vessel in the presence of bisulphite liquor. Cepi Harmonised Code is 922 200 000.

Chemical - Sulphate (or kraft): pulp produced by cooking wood chips in pressure vessels in the presence of a sodium hydroxide (soda) liquor. Cepi Harmonised Code is 922 100 000.

Other Pulp: Pulp produced from fibres other than wood, such as sugar cane bagasse, wheat straw, kenaf, cotton rags and hemp.

Paper and Board

Paper and Board Apparent Consumption: Production + Imports from outside Cepi - Exports to outside Cepi.

Paper and Board Grades

Newsprint: paper mainly used for printing newspapers. Cepi Harmonised Code is 100 000 000.

Uncoated mechanical: paper suitable for printing or other graphic purposes where less than 90% of the fibre furnish consists of chemical pulp fibres. Cepi Harmonised Code is 211 000 000.

Uncoated woodfree: paper suitable for printing or other graphic purposes, where at least 90% of the fibre furnish consists of chemical pulp fibres. Cepi Harmonised Code is 231 000 000.

Coated papers: all paper suitable for printing or other graphic purposes and coated on one or both sides with minerals such as china clay (kaolin), calcium carbonate, etc. Cepi Harmonised Code for Coated Mechanical is 212 000 000 and for Coated Woodfree is 232 000 000.

Tissue Paper: This covers a wide range of tissue and other hygienic papers for use in households or commercial and industrial premises. Cepi Harmonised Code is 700 000 000. Also known as sanitary and household, hygiene paper.

Containerboard: papers and boards mainly used in the manufacture of corrugated board. Included are kraftliner, testliner, semi-chemical fluting, and waste-based fluting (Wellenstoff). Also known as case materials, corrugated case materials, cardboard, linerboard or corrugating medium. Cepi Harmonised Code is 300 000 000.

Cartonboard: made from virgin and/or recovered fibres, mainly used in cartons for consumer products. Also known as solid board, folding box board, boxboard or carrier board. Cepi Harmonised Code is 400 000 000.

Wrappings: papers whose main use is wrapping or packaging made from any combination of virgin or recovered fibres, bleached or unbleached. Included are sack kraft, other wrapping krafts, sulphite and grease-proof papers. Cepi Harmonised Code is 500 000 000.

Other paper and board for packaging: this category embraces all paper and board mainly for packaging purposes other than those listed above. Cepi Harmonised Code is 600 000 000.

Other paper and board: includes cigarette papers and filter papers, as well as gypsum liners and special papers for waxing, insulating, roofing, asphaltting, and other specific applications or treatments. Cepi Harmonised Code is 800 000 000.

Paper for Recycling

Collection: Utilisation - Imports from outside Cepi + Exports to outside Cepi.

Utilisation rate: percentage of paper for recycling utilisation compared to the total paper & board production.

Recycling rate: utilisation of paper for recycling + net trade of paper for recycling, compared to paper & board consumption. Utilisation by sector: total utilisation of paper for recycling in a sector as percentage of the overall utilisation of paper for recycling.

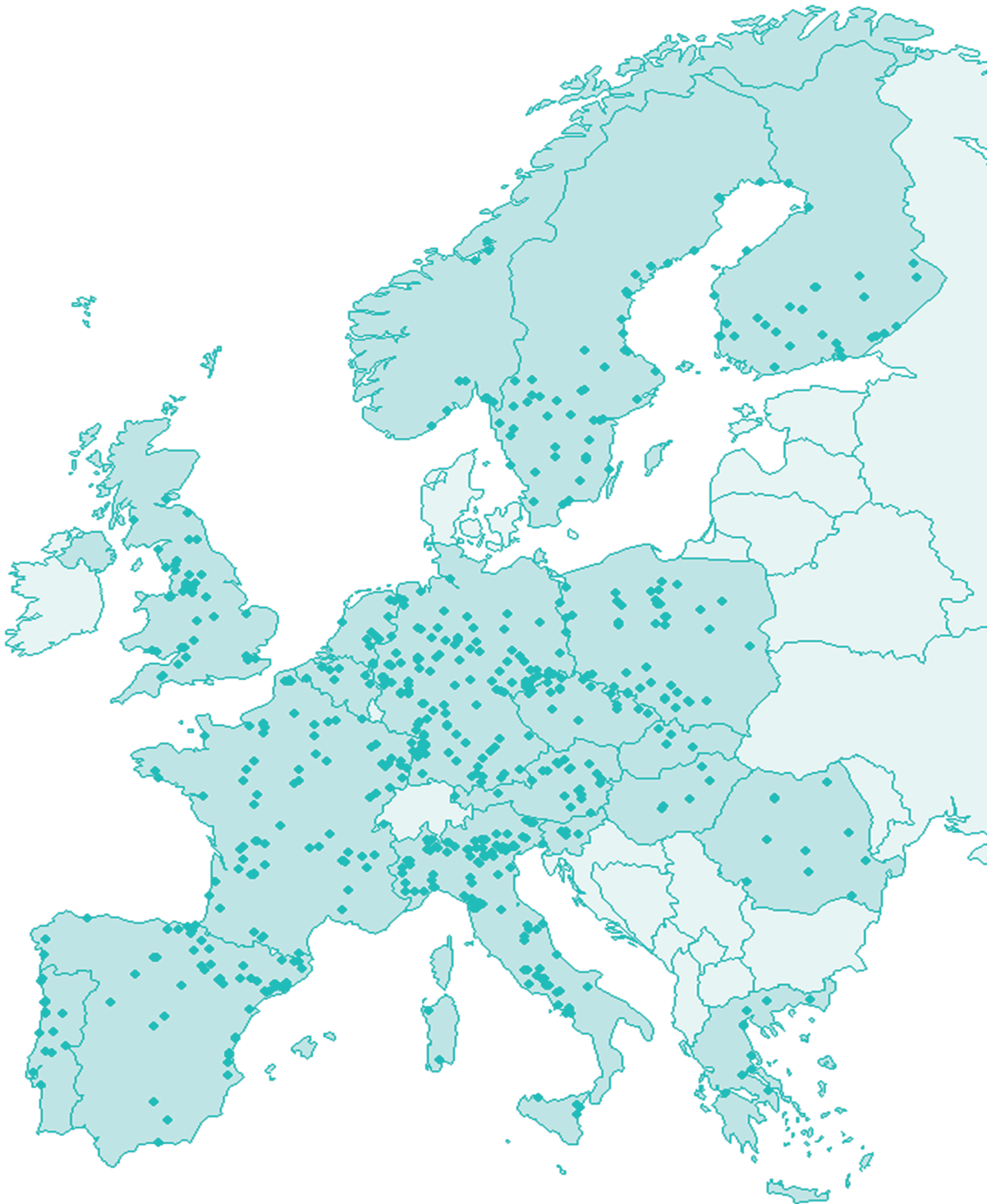
Wood

The wood used for pulp and paper manufacturing is mainly constituted of the following assortments: pulpwood (roundwood other than sawlogs, from silvicultural measures such as thinning or final felling), chips and residues from sawmills. The utilisation of sawlogs is very limited and sawdust volumes consumed are negligible. The relative shares of softwood and hardwood used depend on the country considered and the pulp and paper grades produced. The main softwood species used are pine and spruce. The main hardwood species used are birch, eucalyptus, beech and aspen. Oak is hardly used. The wood consumption figures reported by the pulp and paper companies and included in the Cepi statistics are the volumes of wood at the mill gates and come from domestic supply or imports.

Non-Fibrous Materials

Non-cellulose items added to the paper stock during the papermaking process in order to impart special characteristics to the final product, such as rosins, dyes, fillers, chemicals, starches, additives, brighteners, etc. Non-fibrous materials include functional chemicals and coating chemicals. The main types of materials used can be mainly grouped by purpose: materials for sizing (both internal and surface sizing, materials for loading and filling, materials for colouring and additives used to impart special paper characteristics).

More information can be found in the Cepi booklet Pulp and paper industry - definitions and concepts available on Cepi's website <https://www.cepi.org/definitions-and-concepts-in-the-pulp-and-paper-industry-statistics/>



Source: National Associations, Cepi, Fastmarkets

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