

EUTR in the Pulp & Paper Sector: Introduction to trade flow trends

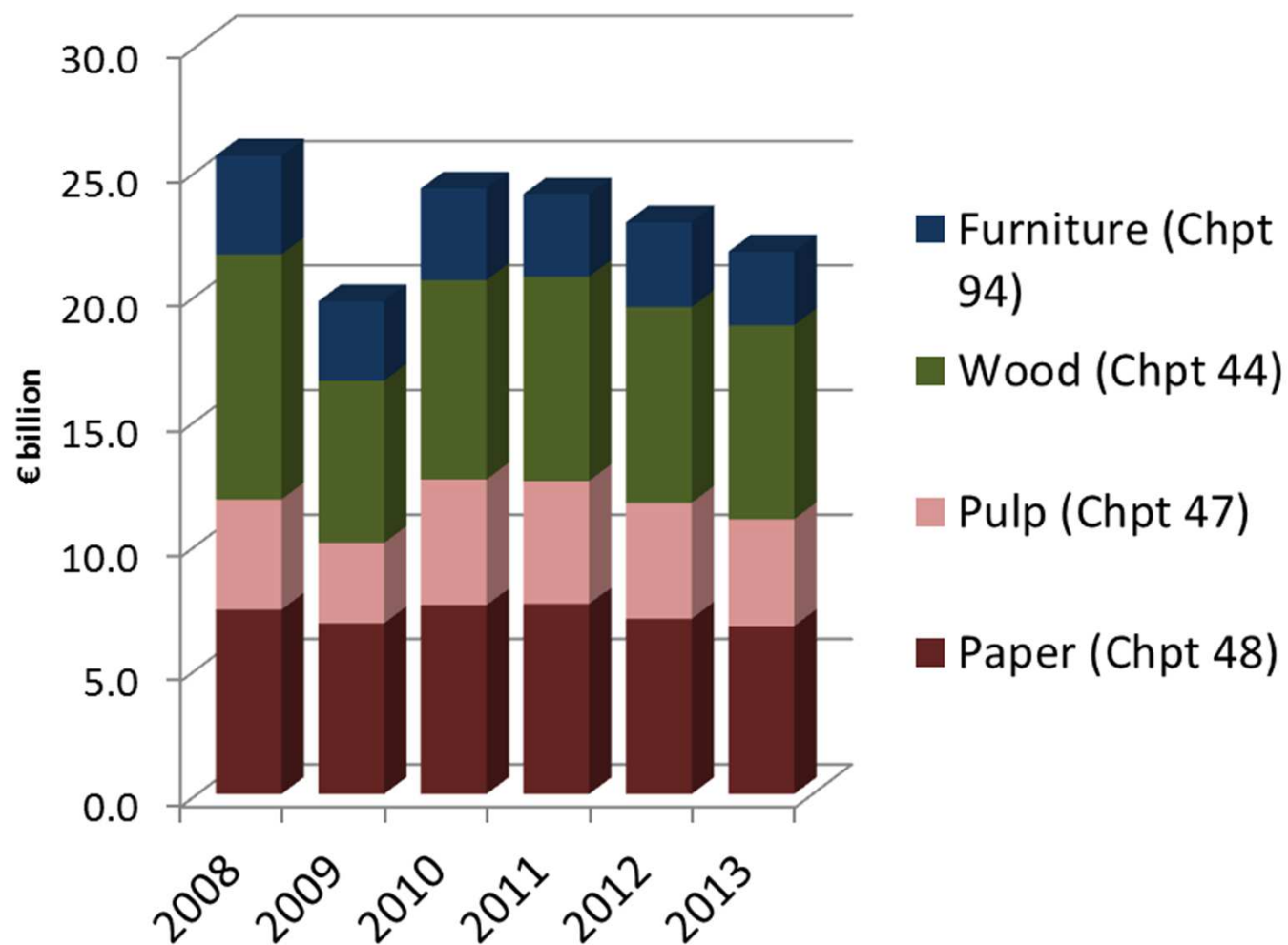
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EUTR coverage of Pulp & Paper

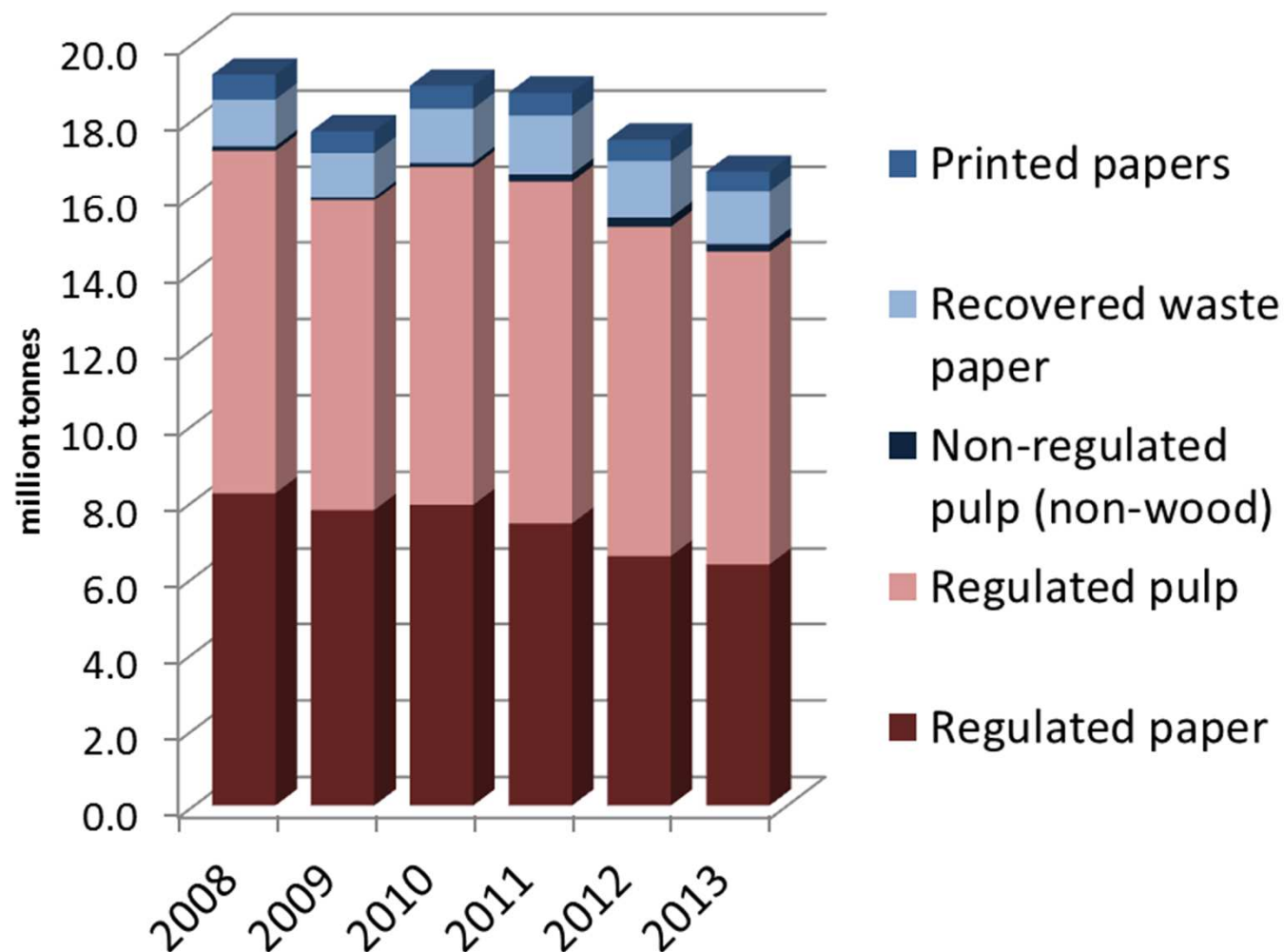
- Includes
 - All pulp and paper products listed in CN Chapters 47 and 48 except bamboo-based and recovered (waste and scrap) products
 - All wooden furniture products listed in CN Chapter 94.
- Excludes
 - Paper products contained in CN Chapter 49 (printed books, newspapers, pictures)
 - All post-consumer recycled products
- Note
 - Chpt 47 codes (Pulp) separate virgin & recycled products
 - Chpt 48 codes (Paper) distinguish by function not fibre content
 - => all paper products need to be treated as if covered by EUTR

Value of EU28 imports of EUTR-regulated Timber & Timber Products 2008-2013



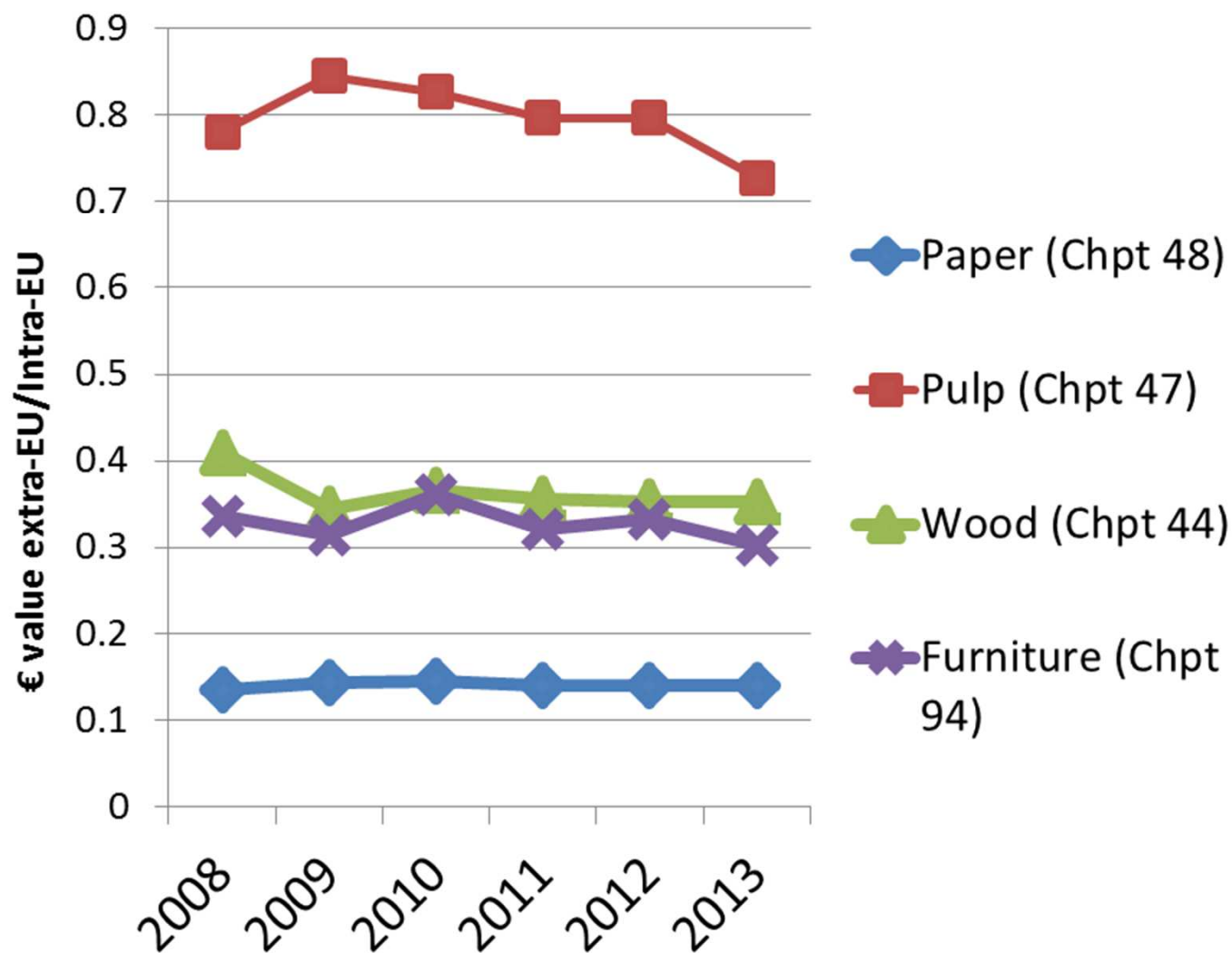
Source: Forest Industries Intelligence Ltd analysis of Eurostat

Tonnage of EU28 imports of regulated & non-regulated pulp and paper imports 2008-2013



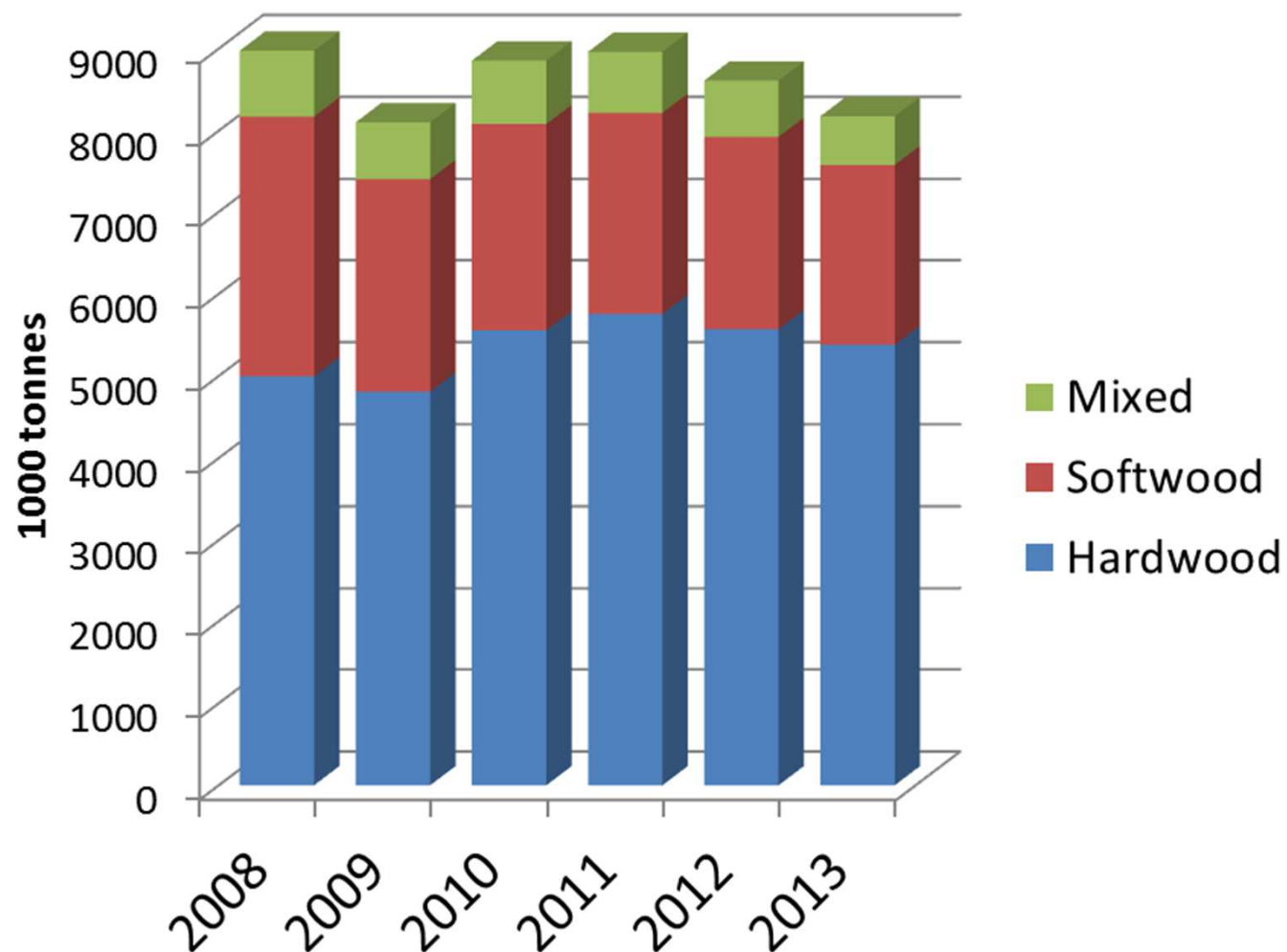
Source: Forest Industries Intelligence Ltd analysis of Eurostat

Ratio of extra-EU imports to intra-EU imports by major product groups 2008-2013

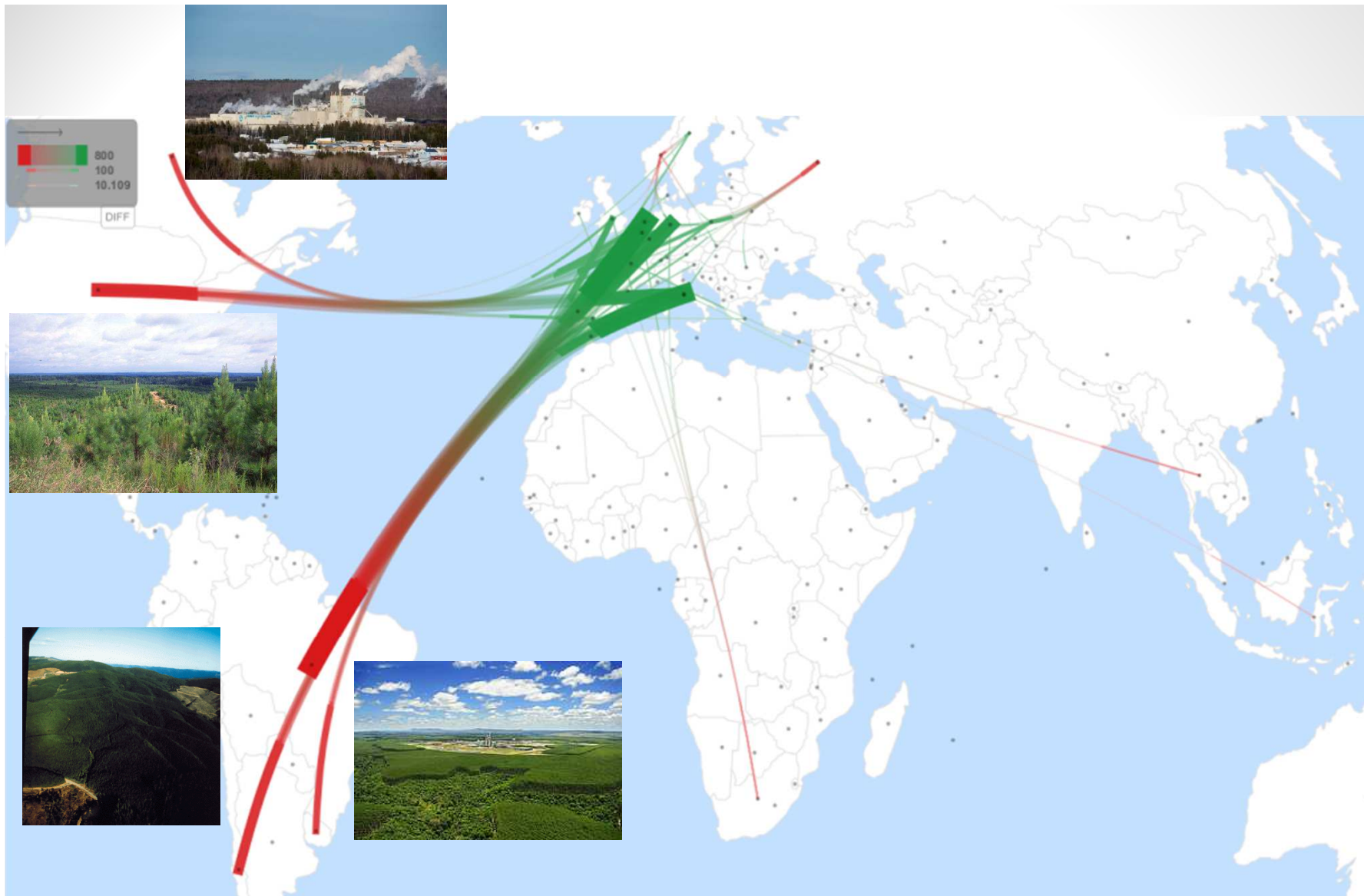


Source: Forest Industries Intelligence Ltd analysis of Eurostat

Quantity of EU28 imports of wood pulp 2008-2013



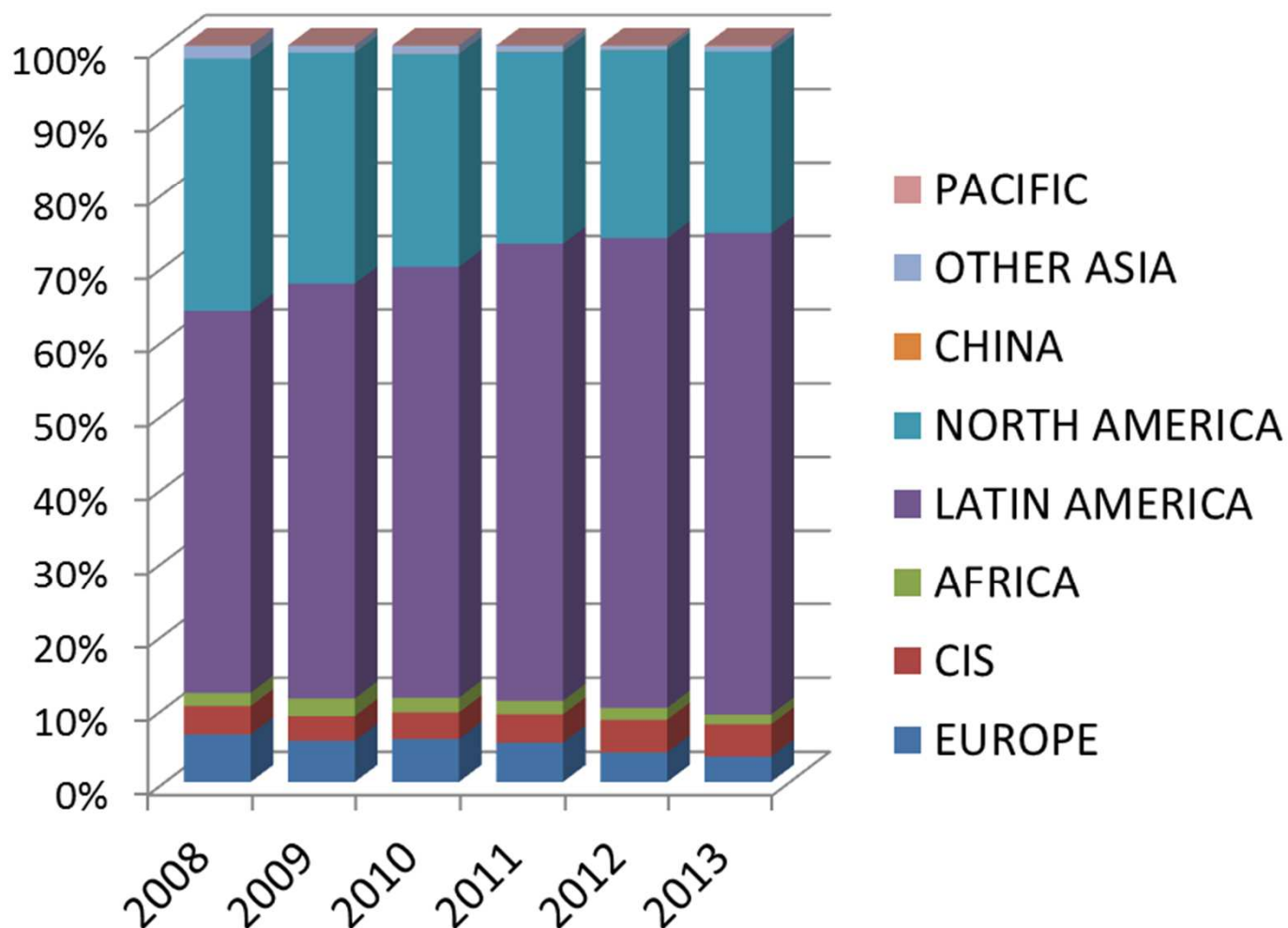
Source: Forest Industries Intelligence Ltd analysis of Eurostat



Wood pulp trade flows into the EU in 2013

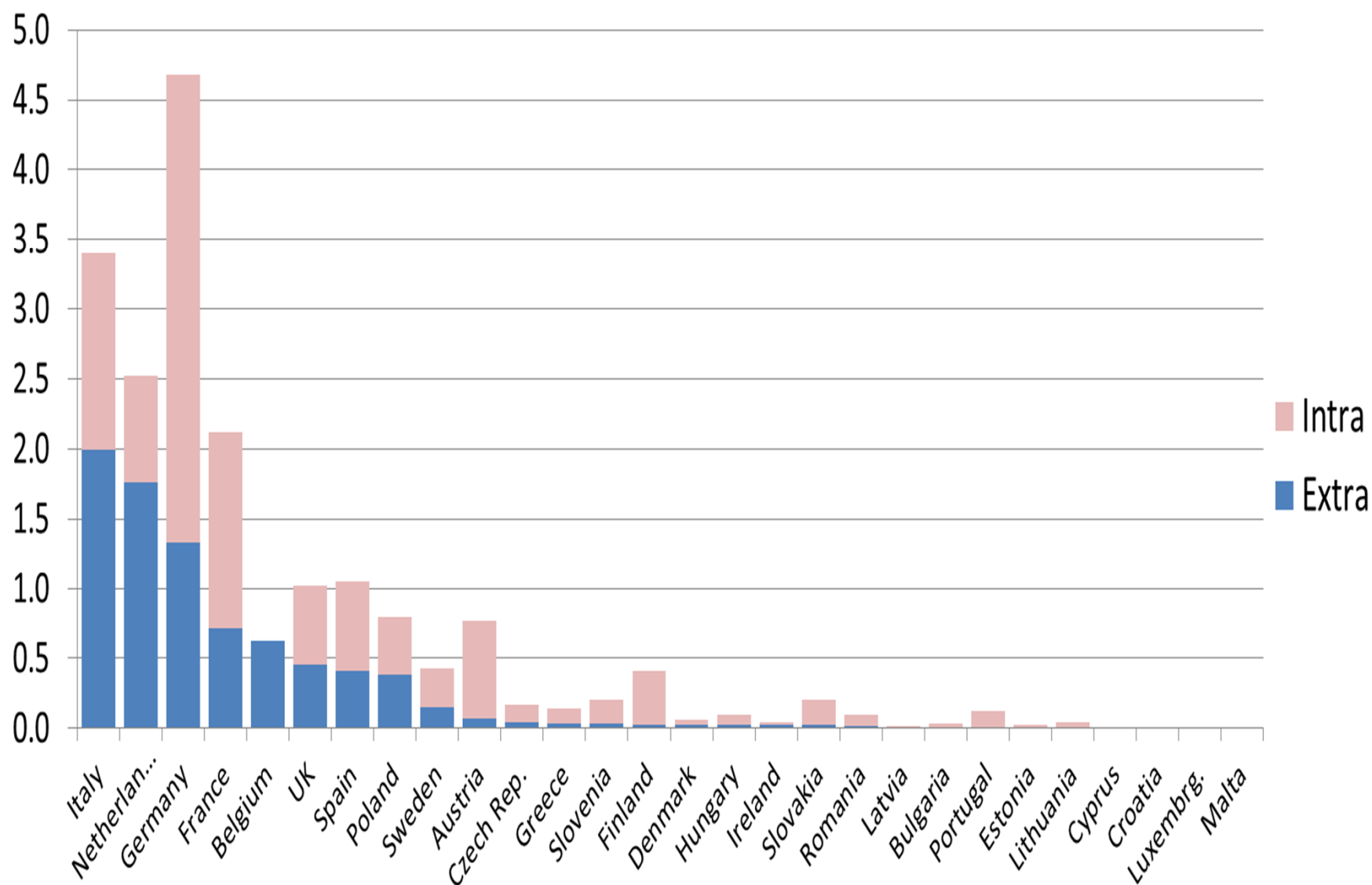
Source: Forest Industries Intelligence Ltd analysis of Eurostat

Supply region % share of tonnage of EU27 imports of wood pulp



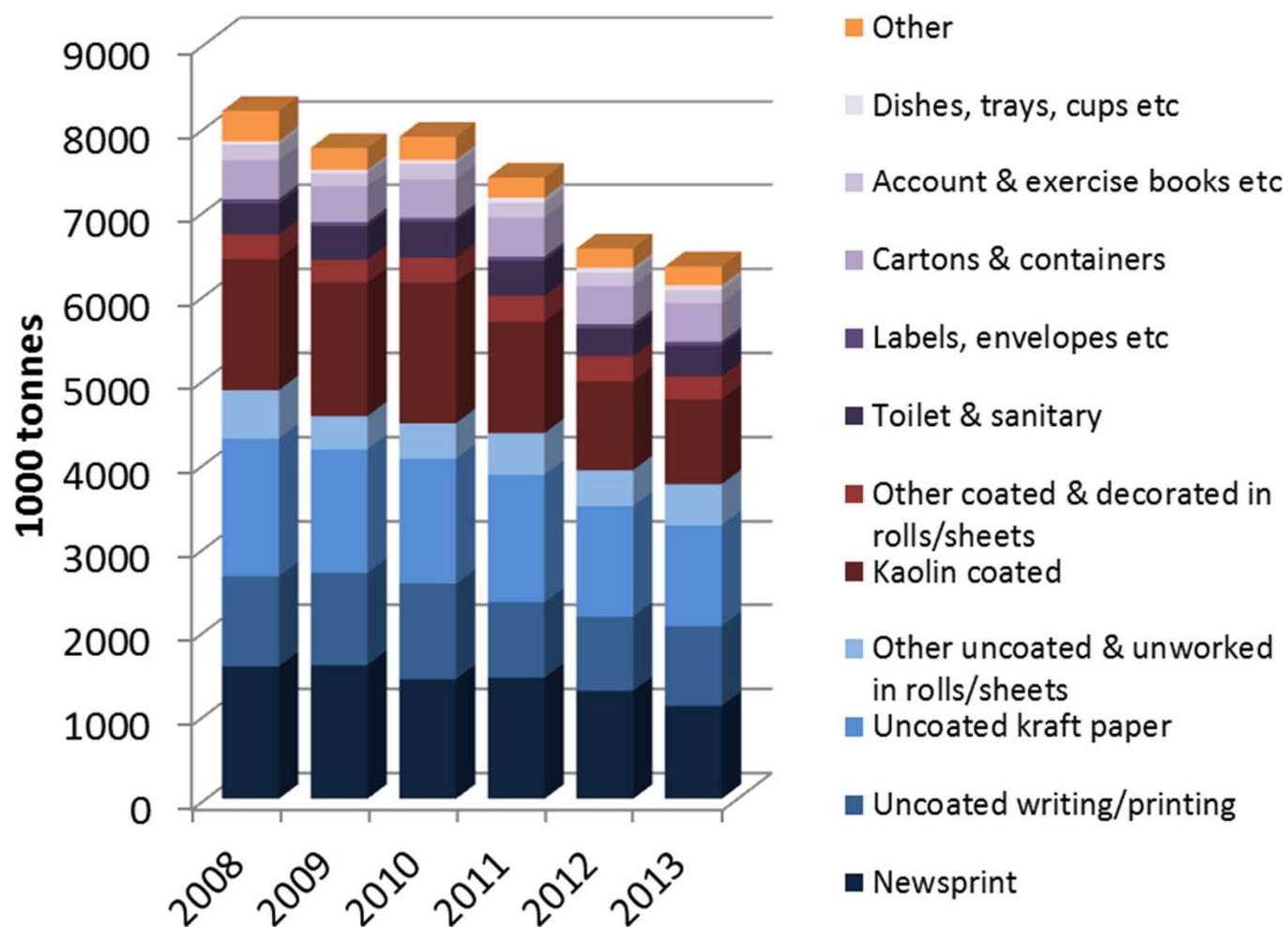
Source: Forest Industries Intelligence Ltd analysis of Eurostat

Imports of EUTR-regulated wood pulp by EU Member States in 2013 (mill tonnes)



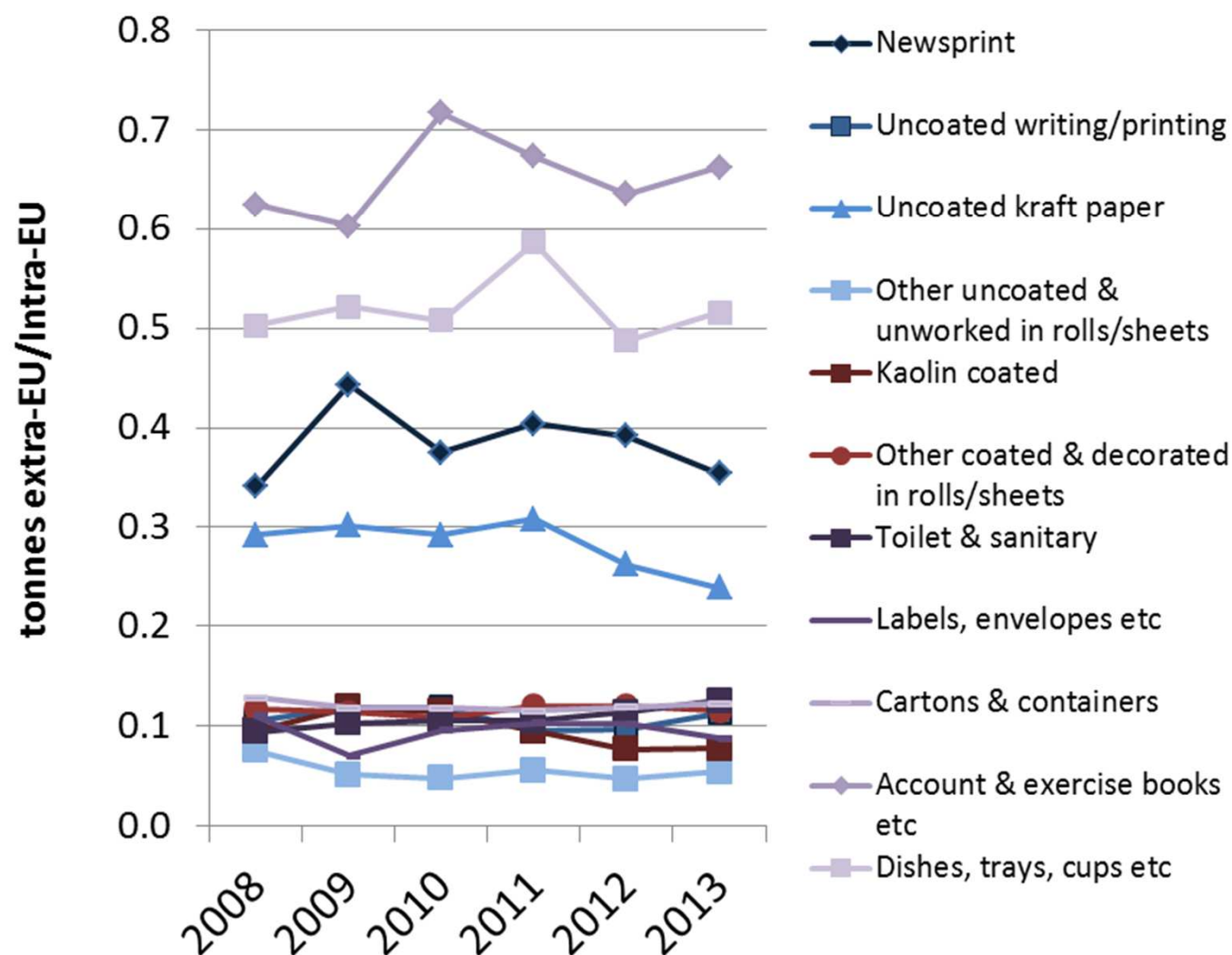
Source: Forest Industries Intelligence Ltd analysis of Eurostat

Quantity of EU28 imports of paper products 2008-2013

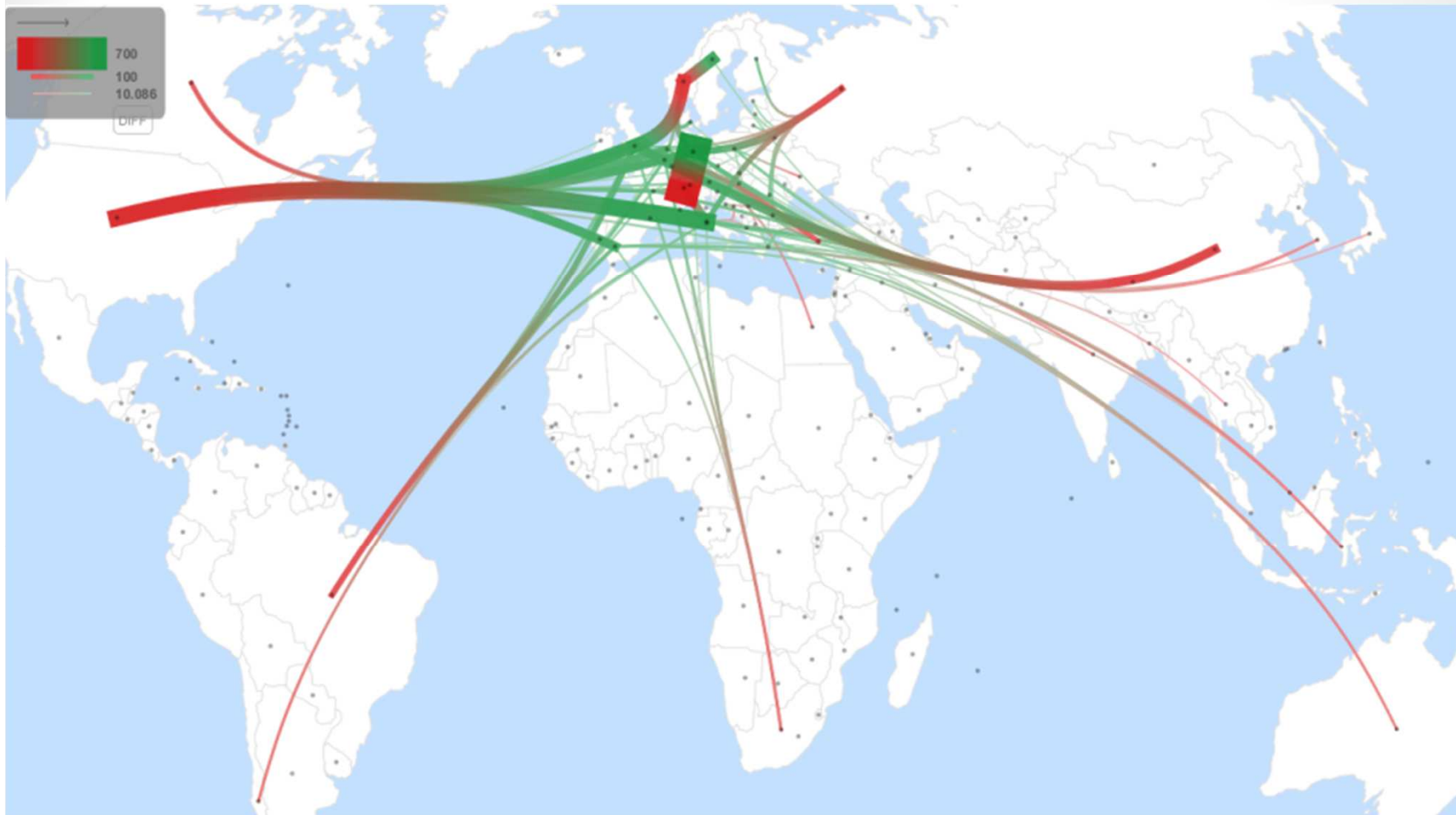


Source: Forest Industries Intelligence Ltd analysis of Eurostat

Ratio of extra-EU imports to intra-EU imports by paper groups (qnty)

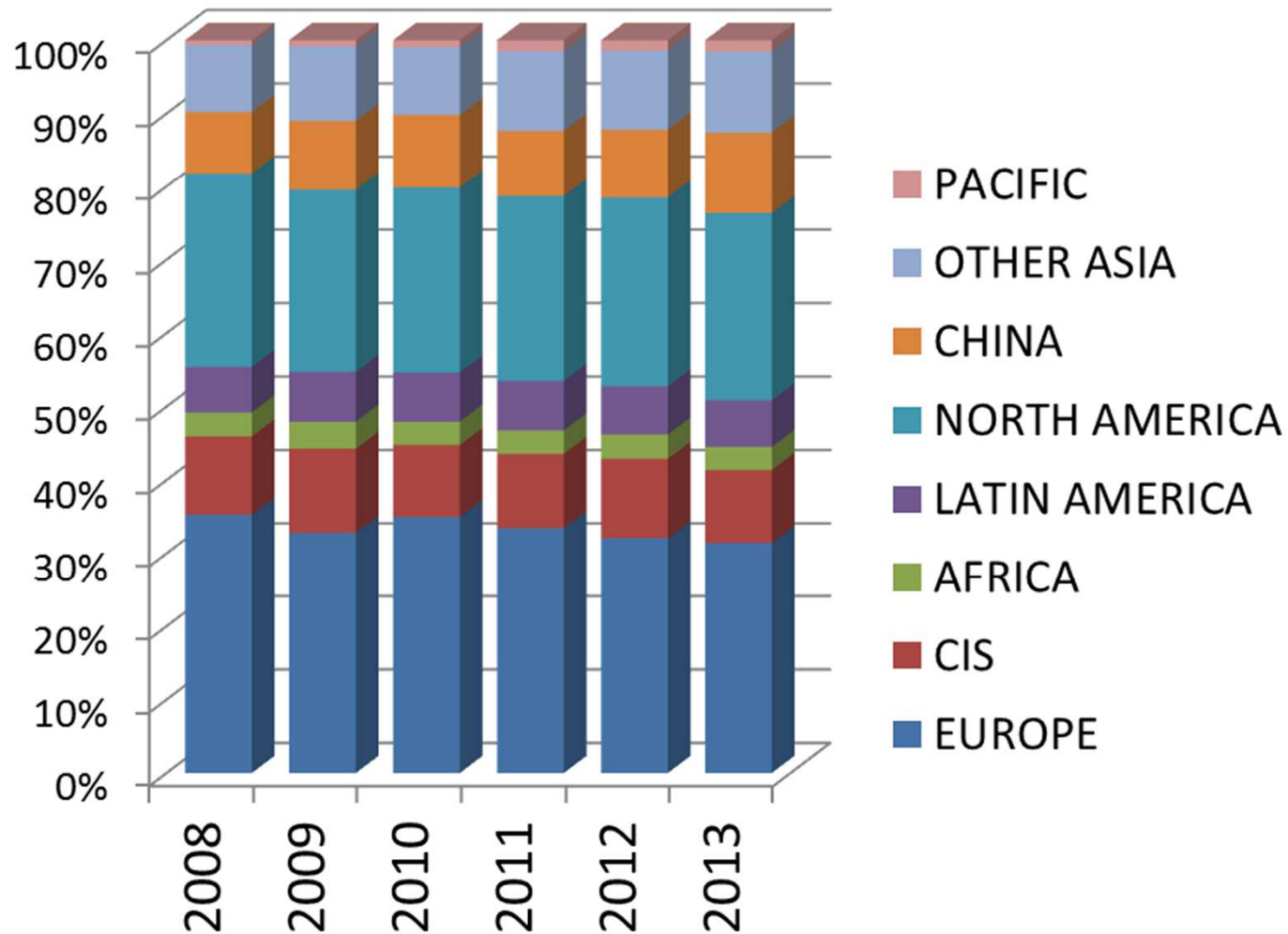


Source: Forest Industries Intelligence Ltd analysis of Eurostat



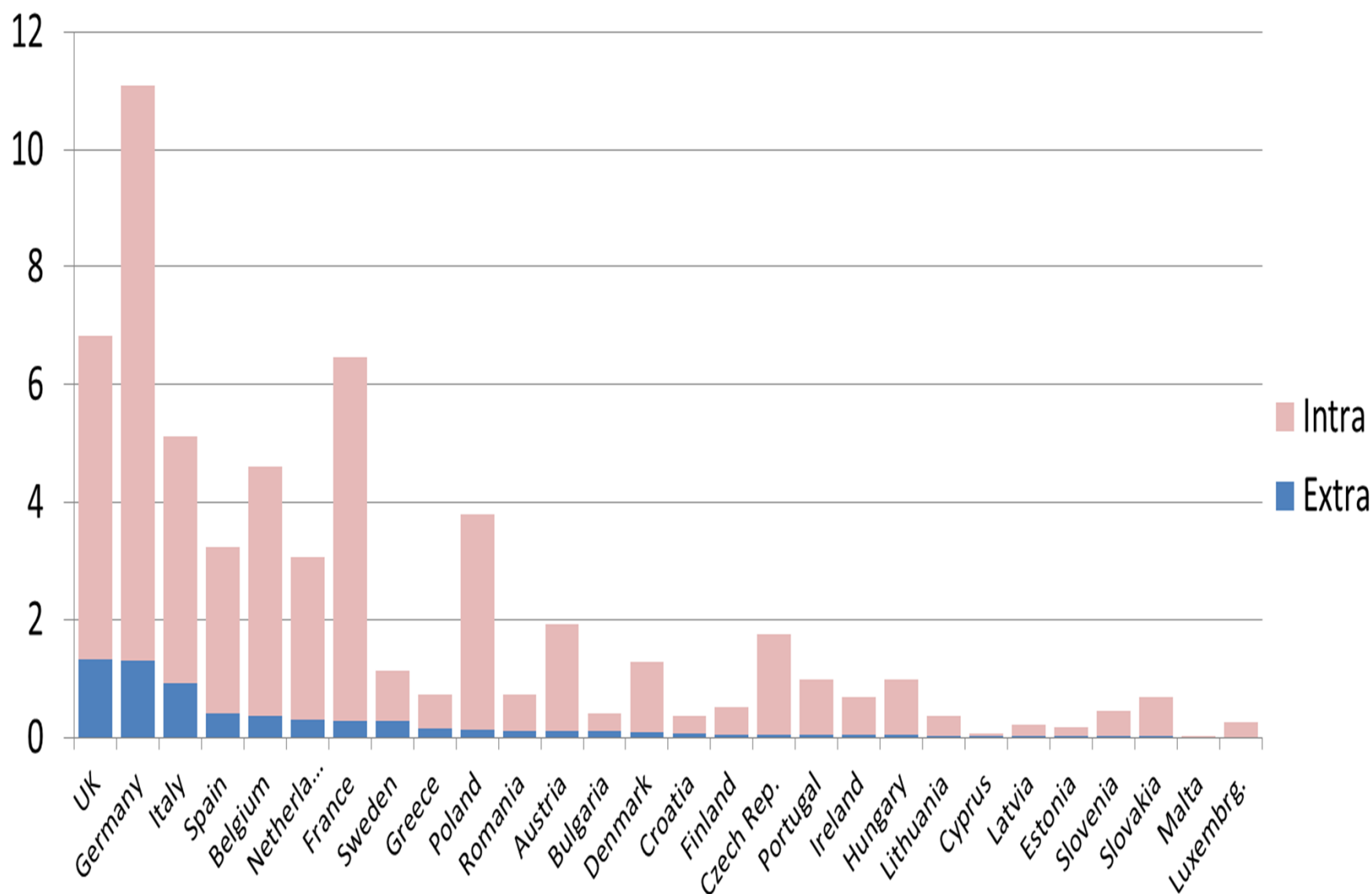
Paper trade flows into the EU in 2013 (1000 tonnes)

Supply region % share of tonnage of EU imports of paper products



Source: Forest Industries Intelligence Ltd analysis of Eurostat

Quantity of extra-EU imports of paper products by Member States in 2013 (million tonnes)



Source: Forest Industries Intelligence Ltd analysis of Eurostat

Thank you!

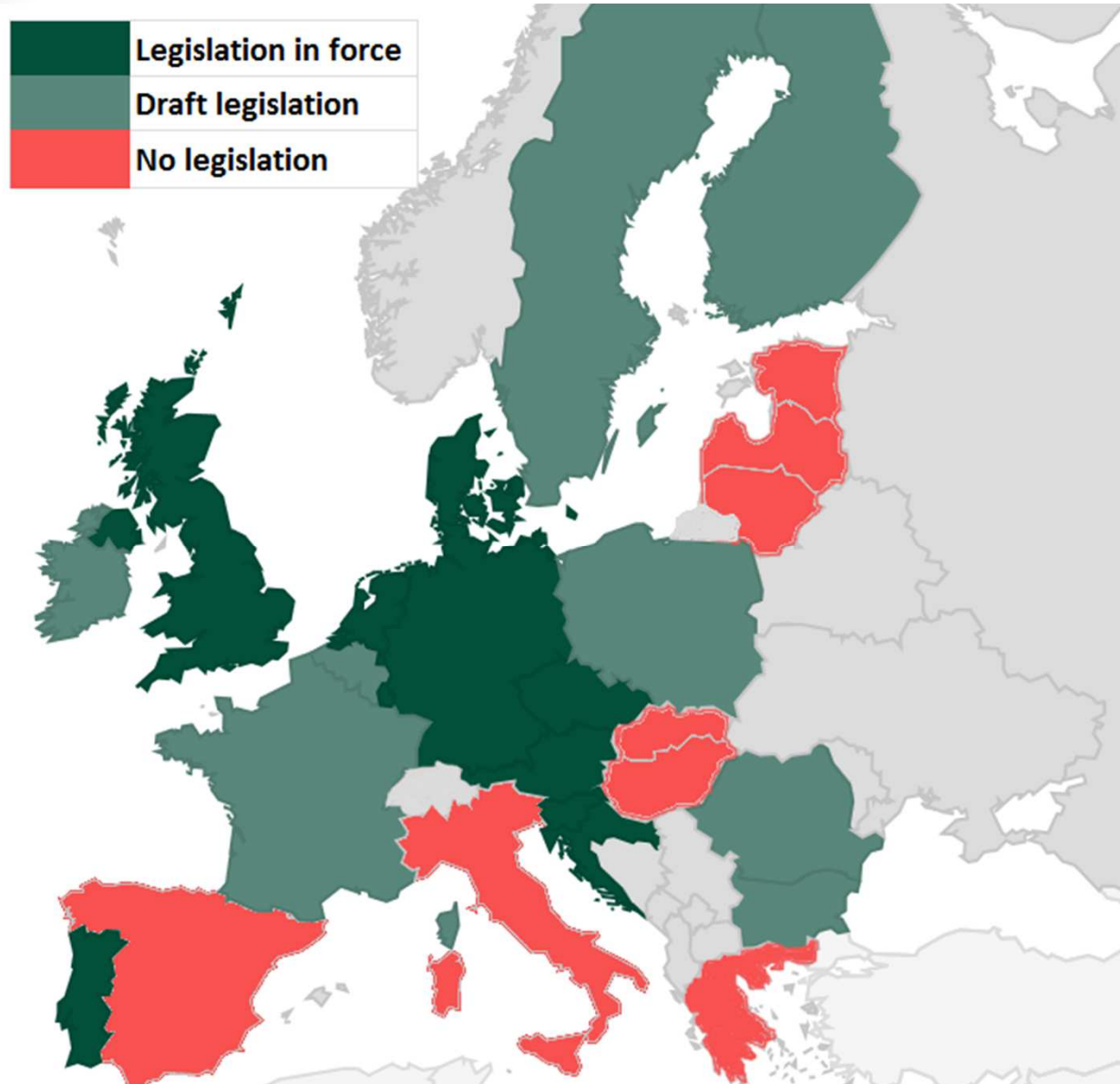
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Status of EUTR Enforcement



Client Earth Survey March 2014

Legislation introduced:

Austria, Denmark, Croatia,
Germany, Cyprus, Czech
Republic, Portugal,
Luxembourg, Slovenia, UK.

Interim system operational

Netherlands

Legislation in draft

Belgium, Bulgaria, Finland,
France, Ireland, Poland,
Romania and Sweden.

No legislation

Estonia, Lithuania, Greece,
Malta, Hungary, Slovakia, Spain,
Italy

No information

Latvia

Approved monitoring organisation

NEPCon (EU wide)
Conlegno (Italy)

EUTR Access to Information Obligation

- EUTR “*access to information*” obligation on species content & place of harvest applies no matter how many different tree species are in any one product or how many countries of harvest are involved
- EC Guidance: “*If the species of wood used to produce the product varies, the operator will have to provide a list of each species of wood that may have been used to produce the wood product*”.
- No reference in EUTR or EC Guidance to an obligation to identify % mix of different species in a composite product.
- In broader context of EUTR text & objectives, assume that higher levels of precision on % mix is important to assess and mitigate risk of illegal wood entering the supply chain

Extract from Annex II to EC Guidance

Product Type:	Coated Art Board from China					Placing on the market possible?
Period:						
Volume	500 Tonnes					
Component	Description	Species	Country/region of harvest	Concession of harvest	Legality evidence	
	Northern Bleached Kraft Pulp (NBKP) Softwood	Western hemlock (<i>Tsuga heterophylla</i>), Douglas Fir, (Pseudo-tsuga menziesii) Western Red Cedar (<i>Thuja plicata</i>), White Spruce (<i>Picea glauca</i>), Lodgepole Pine (<i>Pinus contorta</i>)	Third country boreal	Industrial tree farm concession	Classified "Non-Controversial" under certification guidelines	Yes (if well founded confidence)
	Laubholz Bleached Kraft Pulp LBKP Hardwood	Poplar (<i>Populus spp.</i>)	Third country boreal	Industrial tree farm concession	Classified "Non-Controversial" under certification guidelines	Yes (if well founded confidence)
	Mechanical Pulp	Poplar (<i>Populus tremuloides</i> , <i>Populus balsamifera</i>), White Spruce (<i>Picea glauca</i>), Jack pine (<i>Pinus banksiana</i>)	Third country boreal	Multiple private forest owners	Non-Controversial Legality Certificate	Yes (if well founded confidence)

March 14

Forest Trends & Chatham House

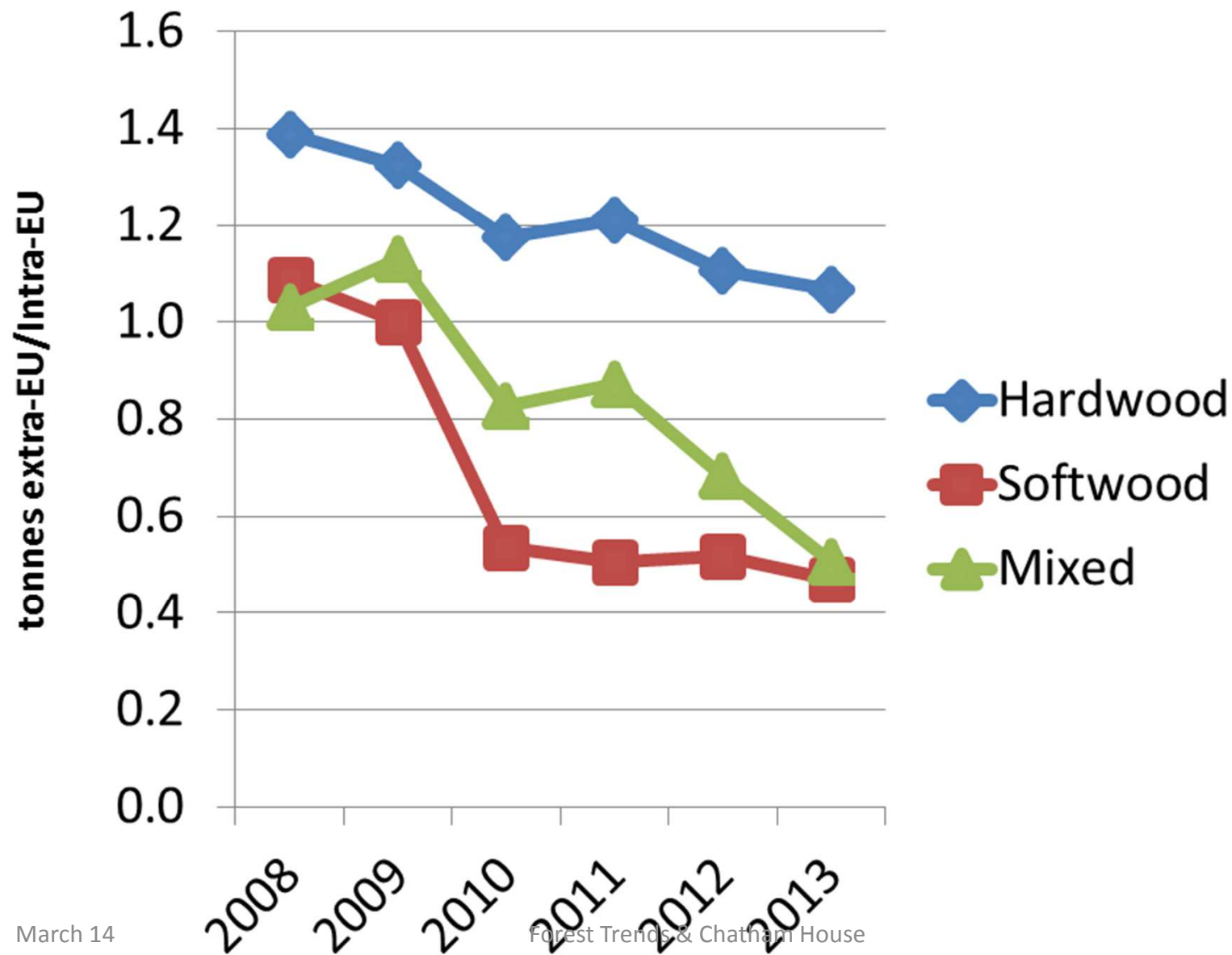
March 14

Forest Trends & Chatham House

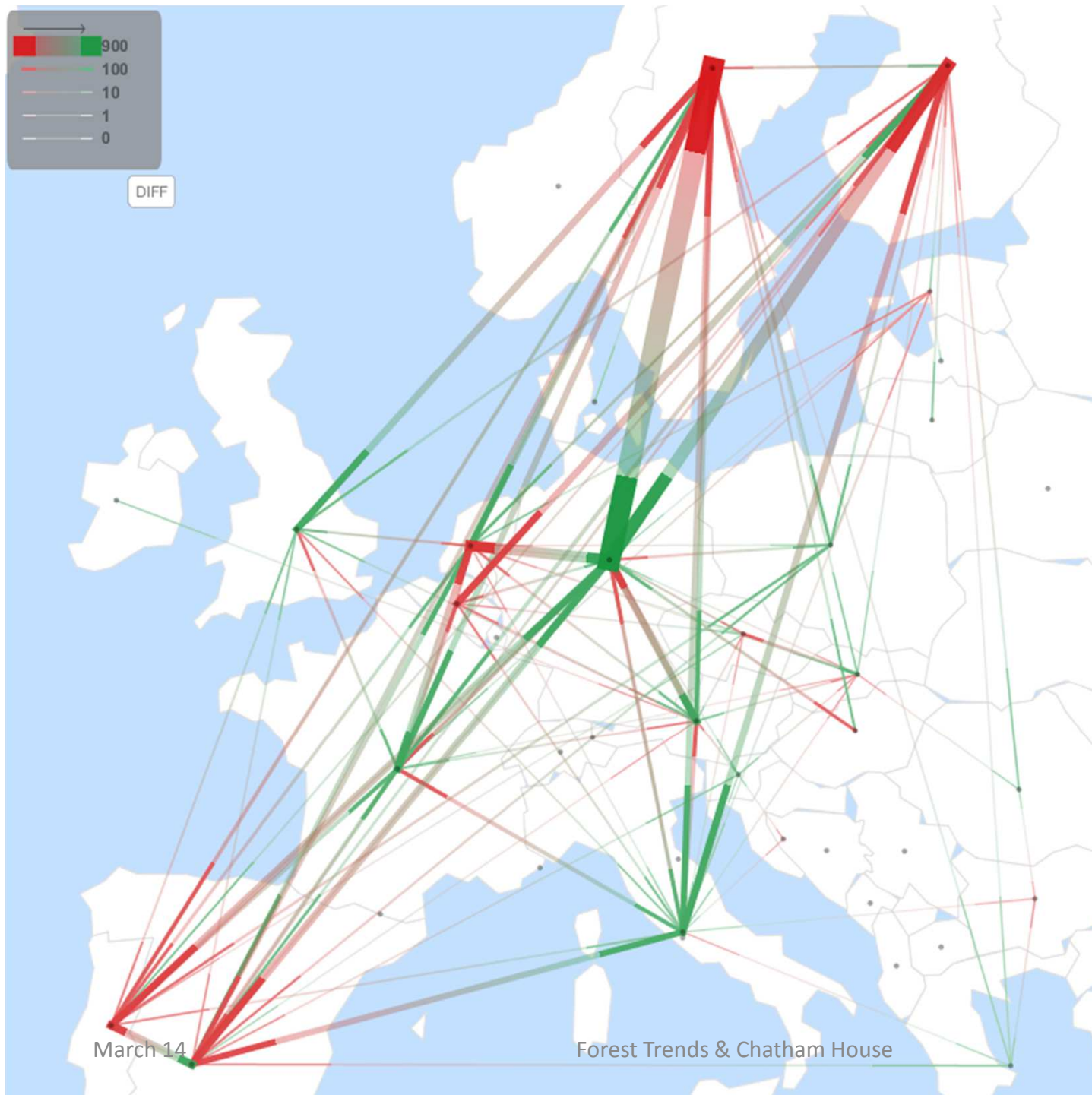
Extract from Annex II to EC Guidance

Product Type:	Writing paper (90 g/m ²) from Indonesia					Placing on the market possible?
Period:	Apr 2012-Mar 2013					
Volume	1,200 tonnes					
Component	Description	Species	Country/region of harvest	Concession of harvest	Legality evidence	
	Short-fibre pulp	<i>Acacia mangium</i>	Third tropical developing country, specified province	Industrial forest plantation concession XXX	Legality certificate	Yes (if well founded confidence)
	Short-fibre pulp	Mixed tropical hardwoods	Third tropical developing country, specified province	Natural secondary forest clearing for plantation for pulpwood and oil palm plantations	None provided	No
	Long-fibre pulp	<i>Pinus radiata</i>	Third temperate country	Forest plantations	Chain of custody certificate	Yes (if well founded confidence)

Ratio of extra-EU imports to intra-EU imports by pulp groups (qnty)



Intra-EU wood pulp trade flows



Intra-EU paper trade flows

