



## **The CEPI 2050 roadmap**

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**UNECE – Timber Committee – 16 October 2012**

# Intro by video



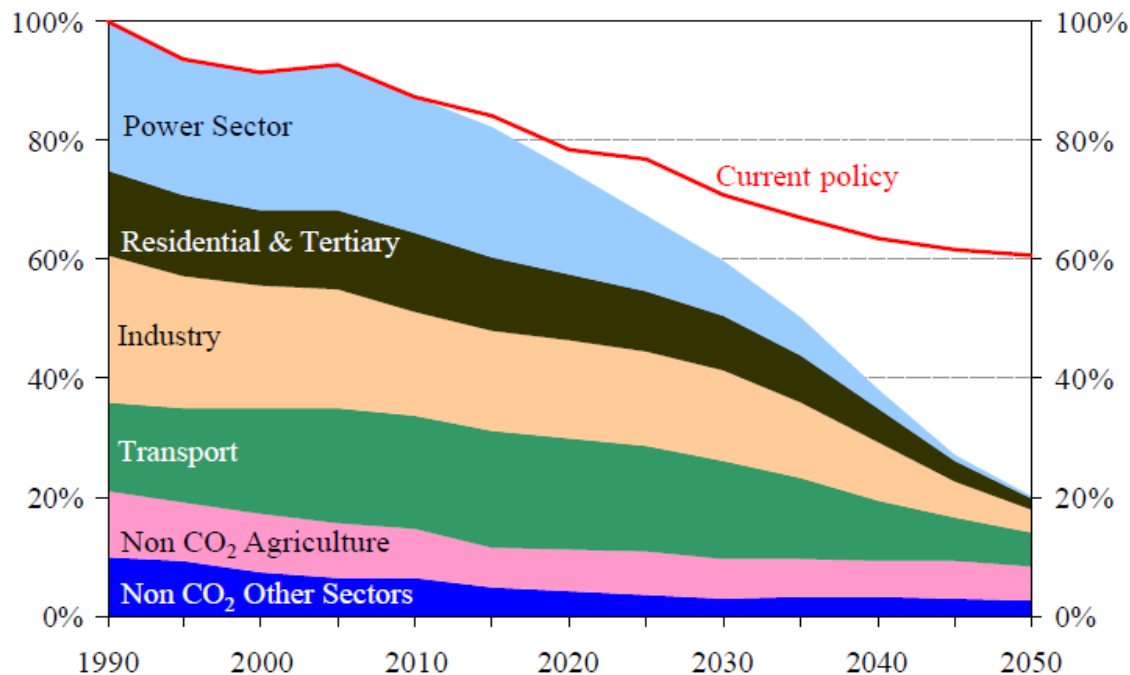
# Justification

- EU Roadmap 2050
- Other EU policies (e.g. RE, raw materials, energy efficiency ...)
- Products grades declining
- Global competition
- Rising energy costs
- Competing demands for raw materials



# The starting point – is this possible?

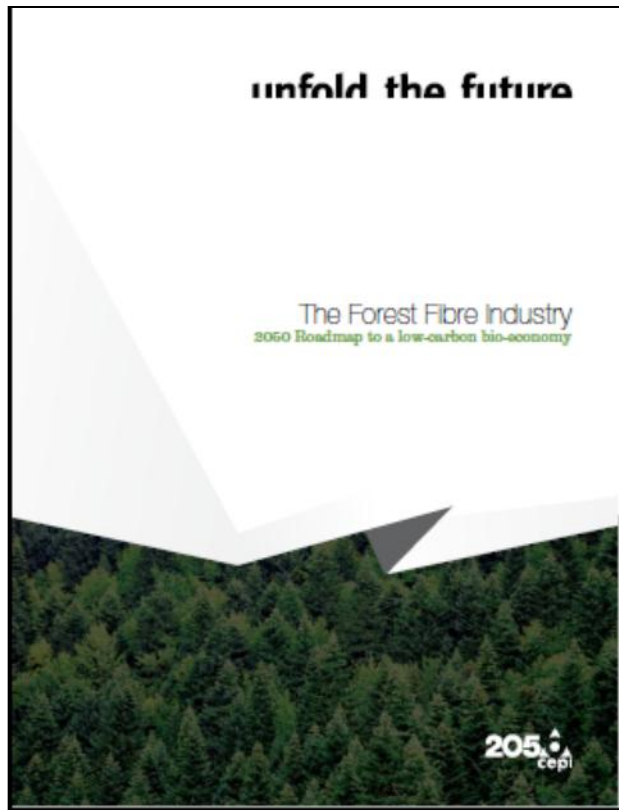
Figure 1: EU GHG emissions towards an 80% domestic reduction (100% = 1990)



....."As solutions are sector-specific, the Commission sees a need to develop specific roadmaps in cooperation with the sectors concerned".

**Commission 2050 Roadmap**

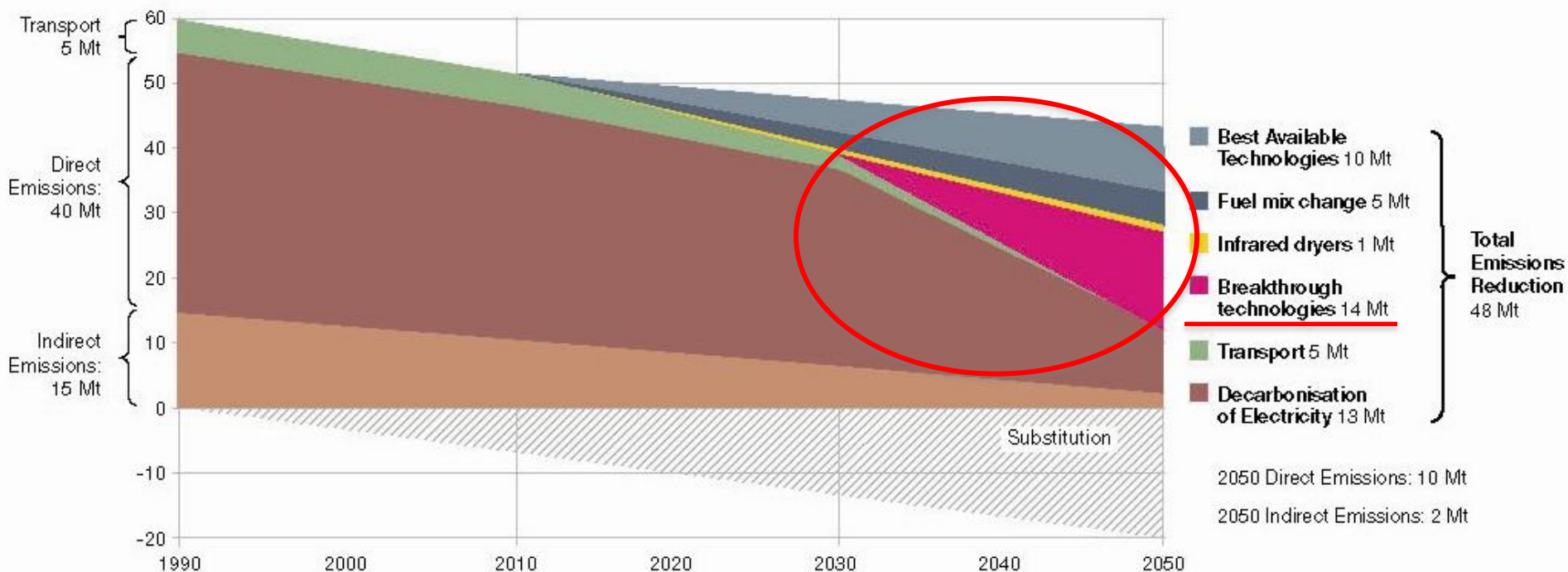
# 2050 Roadmap – Three objectives



1. To shape EU policies.
2. To profile as an innovative, technologically advanced and value adding forest fibre processing sector.
3. To enable and support the industry transformation

# The Transformation workstreams

Emissions Reduction Projection 1990 - 2050 (in million tonnes)



In our technology assessment,  
the CO<sub>2</sub> reduction pathway to  
2050 depends on

# breakthrough technologies.

This is two investment cycles,  
or a maximum of two paper machines  
or boilers away. Breakthrough  
technologies have to become

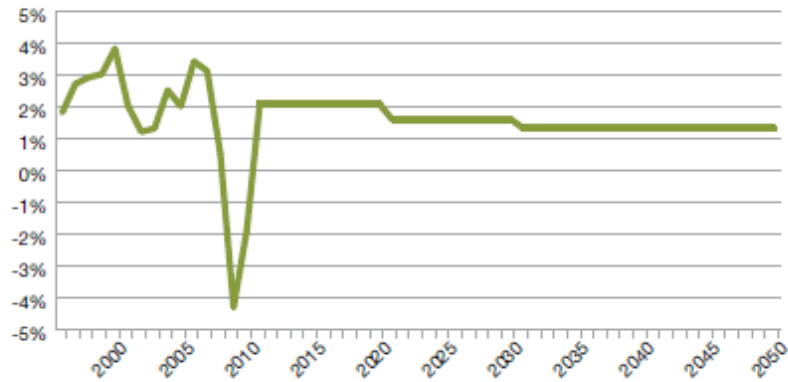
# available by 2030

to be on time for 2050.



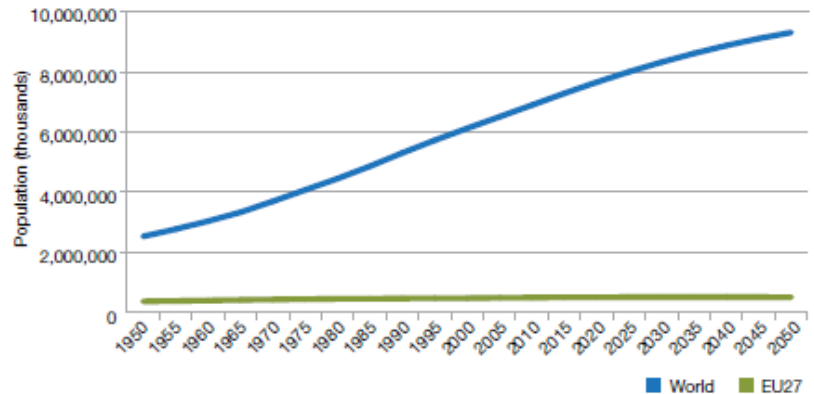
# Fold out the world – its different!

EU27 GDP growth<sup>2</sup>



EU Population growth<sup>3</sup>

Within a global perspective

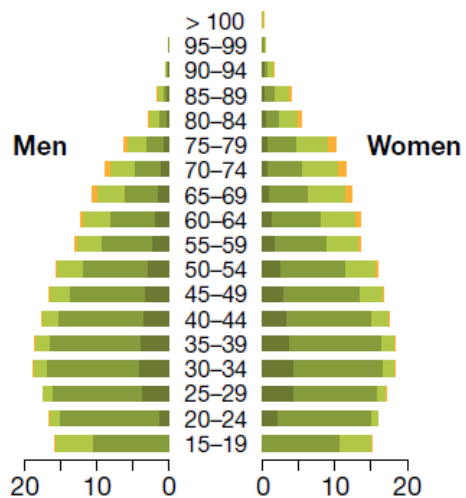




# The ageing society<sup>1</sup>

Population by age, sex and educational attainment


2000





2050




Educational attainment:

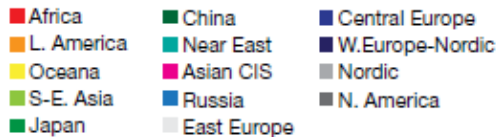
 Higher education

 Some primary education

 Secondary education

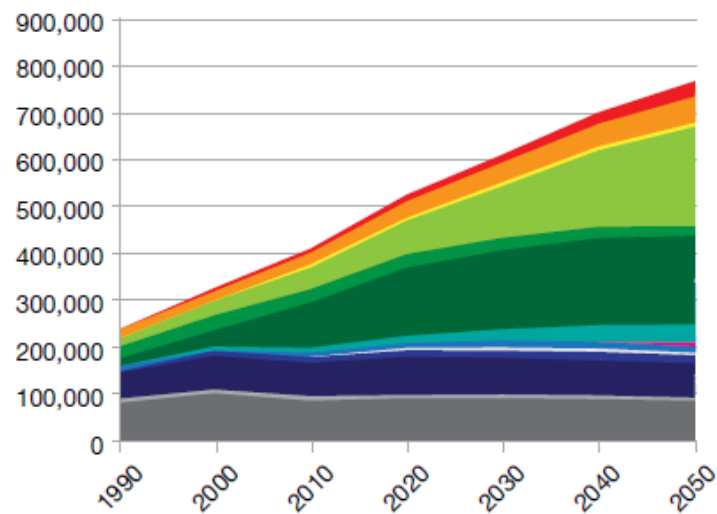
 No formal education

### By % of of global paper and board demand



## Long-term projection on paper and paperboard demand by region until 2050<sup>4</sup>

By 1000 tonnes



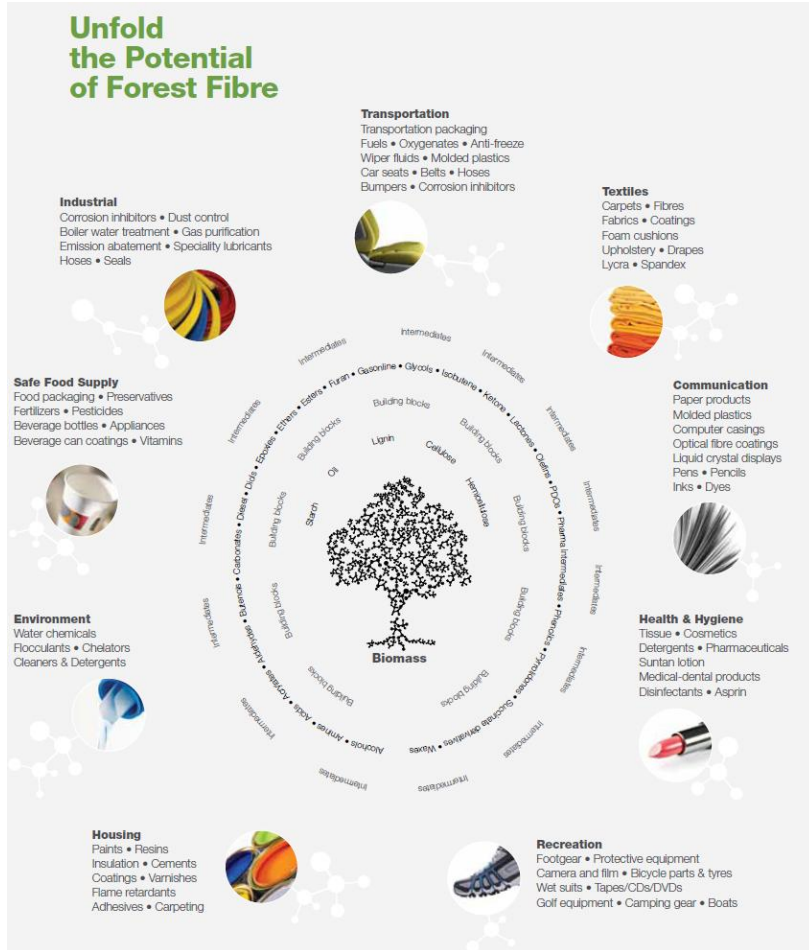
# The challenge

50% more value, 80% less fossil CO<sub>2</sub>,  
40 years from now  
in a mature European market  
in a broad sector scope  
the forest fibre sector



# Value

The core strategy on the path to 2050 is to get the **highest possible value** from resources – wood, virgin and recycled wood fibres, and non-fibrous raw materials.



# The forest fibre industry,

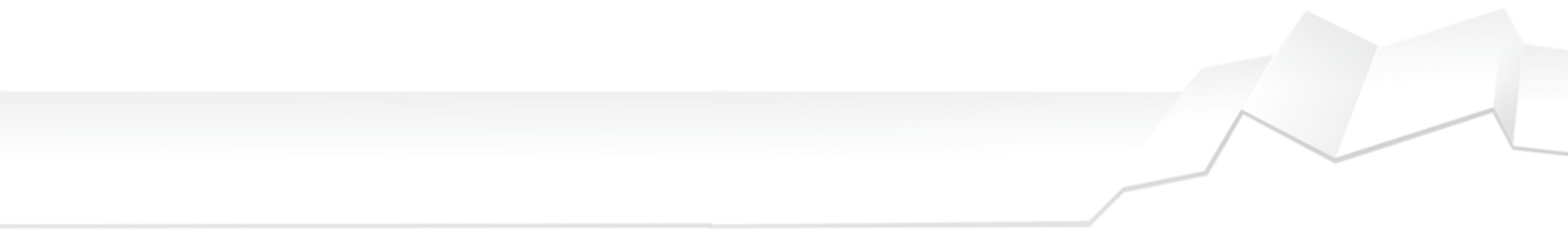
drawing as it does largely  
on EU raw materials, will have  
a central role to play

# in the bio-economy,

where the focus  
will be on sustainable, renewable and  
recyclable raw materials, used in the  
most optimal way, and creating the  
highest possible added value.

# But only if

- We get the raw material needed.
- We have access to finance / investment
- We find the breakthrough technologies
- We remain competitive compared to our global competitors



# Roadmap roll-out: the cuckoo strategy

The eggs	The nests
Paper making without water	Innovation Partnership on water efficiency
The recycling mill of the future	Raw material Innovation Partnership
Raw materials availability	Sustainable agriculture Innovation Partnership
New products/biorefinery	Bioeconomy Public-Private Partnership
Breakthrough technology demo plant	ETS auctioning revenues SILC2
Breakthrough technologies	The Two Teams Project



# Thank you

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