



Total pulp production capacity change (in tonnes per year)

Capacity change occurring inside or near Deforestation Fronts* (in tonnes per year)

Capacity change occurring inside or near Intact Forest Landscapes* (in tonnes per year)

Capacity change occurring inside or near Priority Landscapes* (in tonnes per year)

* Pulp capacity increase in Deforestation Fronts, Intact Forest Landscape and Priority Landscape does not assert actual impacts.

Planned pulp mill lines with more than 400,000 tonnes per year production capacity change

Planned pulp mill lines with less than 400,000 tonnes per year production capacity change

Intact Forest Landscapes: unbroken areas of forest ecosystems with no significant human activity

Deforestation Fronts: areas where deforestation will likely occur by 2030

Mapping Pulp Mill Expansion

New Projects and Regional Risks

Mill information based on RISI mill data (+ other sources), www.risi.com. Positions and capacity of mills based on public sources. Map made by EEPN, August 2015.

Mapping Pulp Mill Expansion

An assessment of the future pulp industry, including risks and recommendations

Global paper consumption has been growing at a steady rate for decades, and has quadrupled since 1960. Around the world we use about one million tonnes of paper every day - and our paper consumption and production is growing. While people and countries who are not getting all the advantages of paper could potentially benefit from increased access to paper, it is crucial to significantly reduce consumption in developed countries, to reduce overall wasteful consumption, and to invest in recycling, in improved forest and plantation management, and in clean production processes.

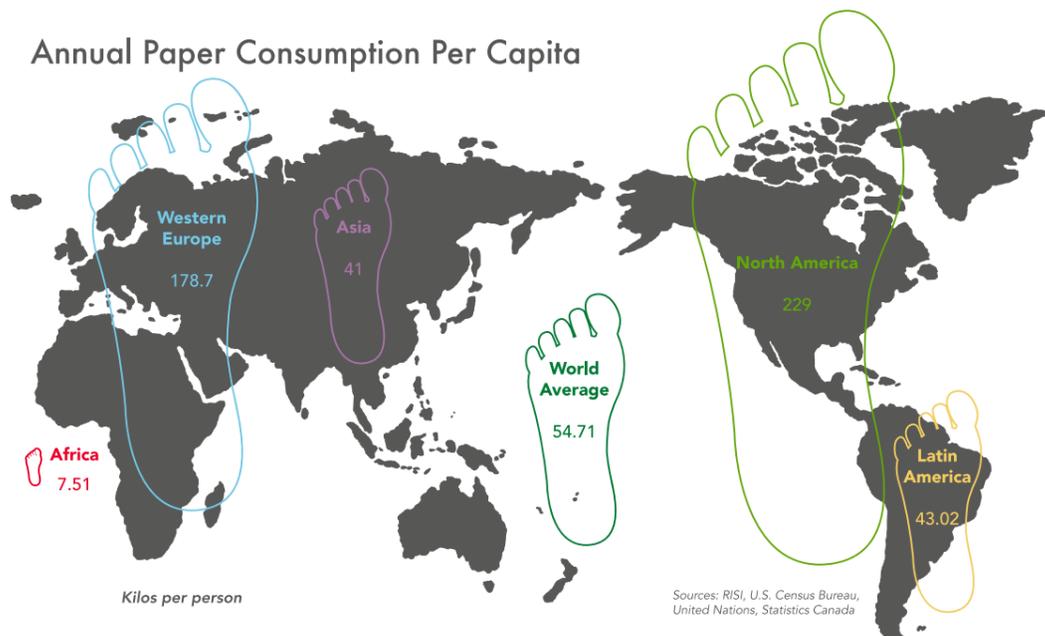
Most of the future pulp production capacity increase is expected to take place in Asia, Russia and South America while today's pulp and paper production is still concentrated in Asia, North America and North and Western Europe. Pulp production is still growing in Asia, but considerably shifting from North America to South America, notably Brazil. Furthermore, most of the capacity expansion in Europe will be located in Russia, marking a strong shift of pulp production towards the east.

In this mapping and report, EEPN (European Environmental Paper Network) analysed the upcoming virgin wood fibre pulp mills and their possible impacts on surrounding forests and land-use. To identify possible impacts of pulp production expansion on local forests, the planned new pulp mills have been overlaid with other maps :

- Intact Forest Landscapes (large and unbroken areas of forest ecosystems with no significant human activity)
- Priority Ecoregions with a high concentration of biodiversity and endangered species,
- Deforestation Fronts, where deforestation is likely to occur by 2030, and where large areas of remaining forest will continue to be degraded.

Pulp capacity increase in deforestation fronts, Intact Forest landscapes, and priority landscapes does not assert actual impact. To analyse a company's likelihood of preventing possible negative impacts and having a forest-friendly development, further elements are provided in the full report (see link at the bottom).

Annual Paper Consumption Per Capita



There are also risks that are common to the sector and can therefore occur in all continents. Those are:

- When timber comes from natural forests, there is a high risk of deforestation or forest degradation.
- When timber comes from plantations the risks are:
 - that the plantations will be established by converting natural forests or other High Conservation Value areas, causing deforestation or forest degradation;
 - that they will be developed on land that local people depend on and that the plantation was established without their free, prior and informed consent;
 - that they will reduce water availability
- For all mills there is also a serious risk of pollution, unless they are built in countries that are able to enforce environmental standards.

These risks need to be carefully assessed and avoided. Companies should only implement projects if all appropriate measures have been taken to avoid them. Financial institutions should not invest in any new mills unless they have guarantees that the company will not cause any of the impacts related to these risks, and governments should establish a legal framework that makes it illegal for companies to cause such impacts.



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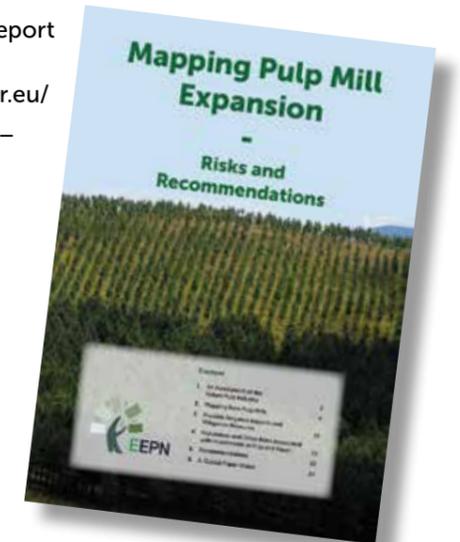
The information in the map is of January 1st, 2015 and only refers to already announced new projects (2015-2020), not to existing pulp production capacity. Information about new projects is by definition not complete as projects change continuously. Some of these projects may have been completed meanwhile, others may have been cancelled or postponed.

This is also an opportunity to transition to the EPN's 'Global Paper Vision', signed by 140 NGOs worldwide:

"We seek the successful transition to pulp and paper that is part of the solution to climate change and is made from responsibly sourced fibres, using entirely low-carbon, renewable energy, with water that is as clean after paper production as before, producing zero waste and zero emissions".

The EEPN report provides an analysis of possible impacts and a set of recommendations for pulp & paper companies, investors, governments and consumers.

Download the full report at: www.environmentalpaper.eu/Mapping_Pulp_Mill_Expansion.pdf



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