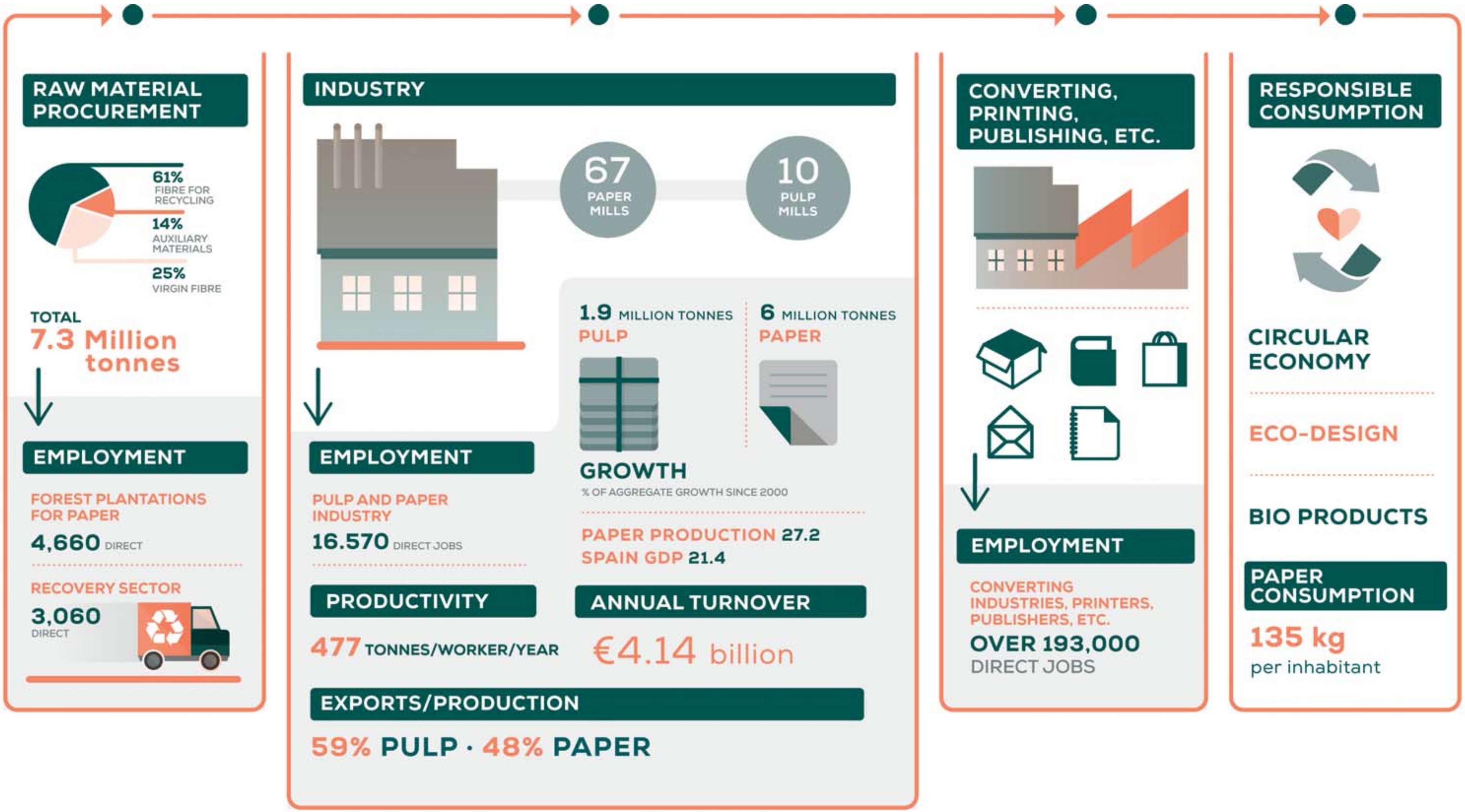
3

Generation of wealth and contribution to quality of life

The products, the consumers

Two thousand years of innovation and adaptation to market demands with new products and new uses and applications are firm testimony of paper's resilience. Renewable and recyclable bio-products such as paper, capable of producing added value from the initial raw materials, are the products of the future, the ones most keenly suited to meet the demands of today's consumers. The paper chain - from the forest, through pulp and paper making and its transformation into all kinds of paper products (boxes, bags, books, papers, tissue products ...), up to its collection and treatment for final recycling in a paper mill, thus closing the cycle, is a powerful value chain for creating employment and wealth.

The value chain in the paper sector



Paper sector - key to re-industrialisation

23GR I G4-EC1

The Spanish paper industry is a strong sector with a large export capacity, which generates stable, quality employment using local raw materials. Furthermore, it is a bio-industry based on a renewable resource, a reference figure in the new industrial model of circular economy. Therefore, it is key to our country's re-industrialisation process.

Spain is Europe's fifth largest **producer** of pulp, a position it won over from France in 2011. It is joined in that group by the leaders, Sweden and Finland, the two great European forest powers (Spain is the third country in the EU in terms of forest land cover), Germany, the major industrial power, and Portugal.

We are also the sixth largest producer of paper in the EU, behind Germany, Finland, Sweden, Italy and France, after overtaking the UK in 2006.

Evolution of production and consumption ('000 ton)

	2006	2007	2008	2009	2010	2011	2012	2013	2014
Paper production	6.353	6.713	6.414	5.700	6.193	6.203	6.177	6.181	6.036
Paper consumption	7.868	7.707	7.266	6.213	6.448	6.428	6.158	6.085	6.257
Pulp production	2.038	2.080	2.009	1.739	1.865	1976	1.981	1.977	1.863
Pulp consumption	1.992	2.020	1.965	1.743	1.794	1.771	1.847	1.921	1.813

SOURCE: ASPAPEL

Total turnover in sector (million Euro)

23GR I G4-EC1

2006	2007	2008	2009	2010	2011	2012	2013	2014
4.700	5.060	4.845	3.400	4.160	4.643	4.317	4.263	4.141

SOURCE: ASPAPEL

Sector growth compared to GDP (in % aggregate growth since 2000)

21GR

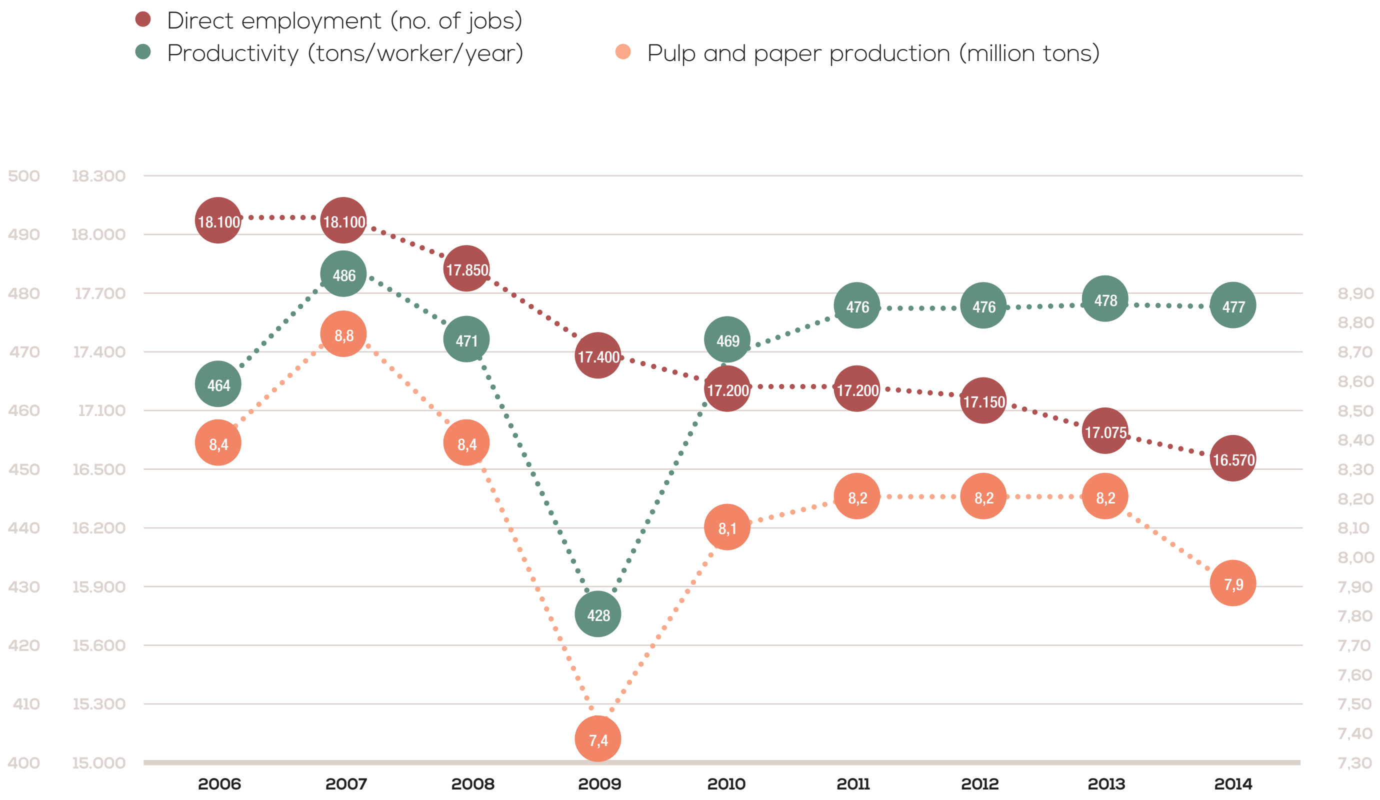
SOURCE: INE AND ASPAPEL

A sector that grows faster than GDP: In recent years, the sector has evolved above and parallel to GDP, a trend that was only broken in 2009, when domestic consumption of paper underwent a significant decline. Growth in exports and improved domestic market share have enabled much of the production volume lost in the first recession to be recovered and maintained during the second cycle of economic downturn. The last year in the reporting period reflects the impact on the sector of new regulation concerning electricity production.

21GR

Employment and productivity

26GR | 27GR



SOURCE: ASPAPEL

The number of direct **jobs** in the sector in 2014 was 16,570 and indirect employment stood at around 83,000 workers. These figures represent a job loss of 3.7% during the period covered by the report (2011-2014), which coincides with the second recession. This is a moderate loss of employment compared to what occurred in the Spanish labour market as a whole (total loss of employment in the paper industry throughout the whole crisis was 8.5%). Labour productivity has continued to rise during the period, unlike in the first recession.

The Spanish paper industry is an **export** industry and precisely foreign markets have been its driving force throughout the crisis, with a significant increase in export levels which see half of its output sold to foreign markets. Despite a downturn in domestic consumption by almost two million tonnes, Spanish paper production diminished by just half a million tons during the crisis, thanks to increased exports.

The Spanish paper industry exported 59% of its pulp production and 48% of its paper production in 2014. Exports accounted for 63% of the sector's total turnover. Since 1990, paper export levels have increased almost six fold and pulp has more than doubled. Record highs in exports were achieved during the crisis, but in 2014, energy surcharges as a result of the enactment of new framework regulations have hindered exports.

The main export destination is the European Union, principally France, Italy and Germany, thus demonstrating our industry's competitive edge.

Evolution of export rates (% exports/production)

25GR

	2006	2007	2008	2009	2010	2011	2012	2013	2014
Paper export rate	44,0	41,2	46,2	49,3	49,4	47,6	47,9	49,3	48,3
Pulp export rate	47,6	53,4	53,3	50,1	51,8	62,3	59,2	61,6	58,9

SOURCE: ASPAPEL

Destination of pulp and paper exports (% of total)

25GR

	2006	2010	2014
European Union	78	76	73
Asia	8	8	10
Africa	5	8	10
America	5	6	7
Rest of the world	4	2	0

SOURCE: ASPAPEL

Market performance of listed companies[1]

[1] (Cotización promedio ponderado de las empresas del sector (Europac, Iberpapel, Ence y Miquel y Costas)

Paper, an interesting sector to invest in: The strength and stability of a mature and predictable sector, a keen exporter that manufactures products essential to everyday use, make it an attractive investment. Even during the difficult years of the crisis, many companies in the sector were able to maintain reasonable returns. From its origins as family and private businesses, many companies have seen the arrival of foreign investors and some are now listed on the stock market.

During almost the entire period (2011-2014), the sector's market performance as a whole was positive, with the industry's average share price running higher than the Spanish IBEX 35 index, in a clear and sustained upward trend.

Paper industry, capital intensive

22GR

Investments are returning to the paper industry and is doing so with strength, growing by 23% in 2014. The significant investments made in the boom years (€1.527 billion between 2005 and 2008), which accounted for extra competitiveness to weather the crisis with the sector performing better than Spanish GDP had been followed by five years of decline.

A new investment cycle, which began in 2014 with an increase in CAPEX, primarily aimed at increasing production capacity, reducing costs and enhancing technological innovation and renewal, is now in full throe. Throughout the period 2011-2014, the sector invested a total of 639 million Euros, representing nearly 4% of turnover.

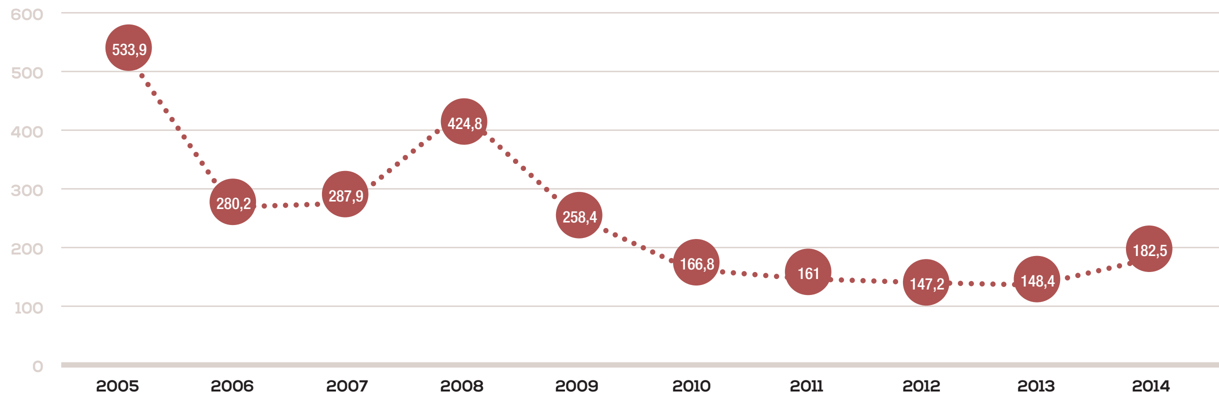
2011-2014
€639
million CAPEX

The bulk of these investments (43%) were intended to increase production capacity in order to respond to the recovery of the domestic market (already seen in 2014 with a growth in paper consumption in Spain of 2.8%), while maintaining our paper industry's exporting strength.

The next heading in investment levels (21%) is intended to reduce costs, essential for improving competitiveness in the current scenario of high energy costs for Spanish industry, especially in a sector such as paper, in which both the domestic and foreign markets are fully globalized and highly competitive.

Pulp & paper sector capital investment
(million Euro)

22GR



SOURCE: ASPAPEL

Closely linked to improving competitiveness is the third block of capital investment, aimed at technological innovation and renovation of plant and machinery, representing 16% of total CAPEX in the pulp and paper sector in 2014. It is significant that, over the period 2011-2014, these investments totalled 164 million Euros, 26% of total capital outlay.

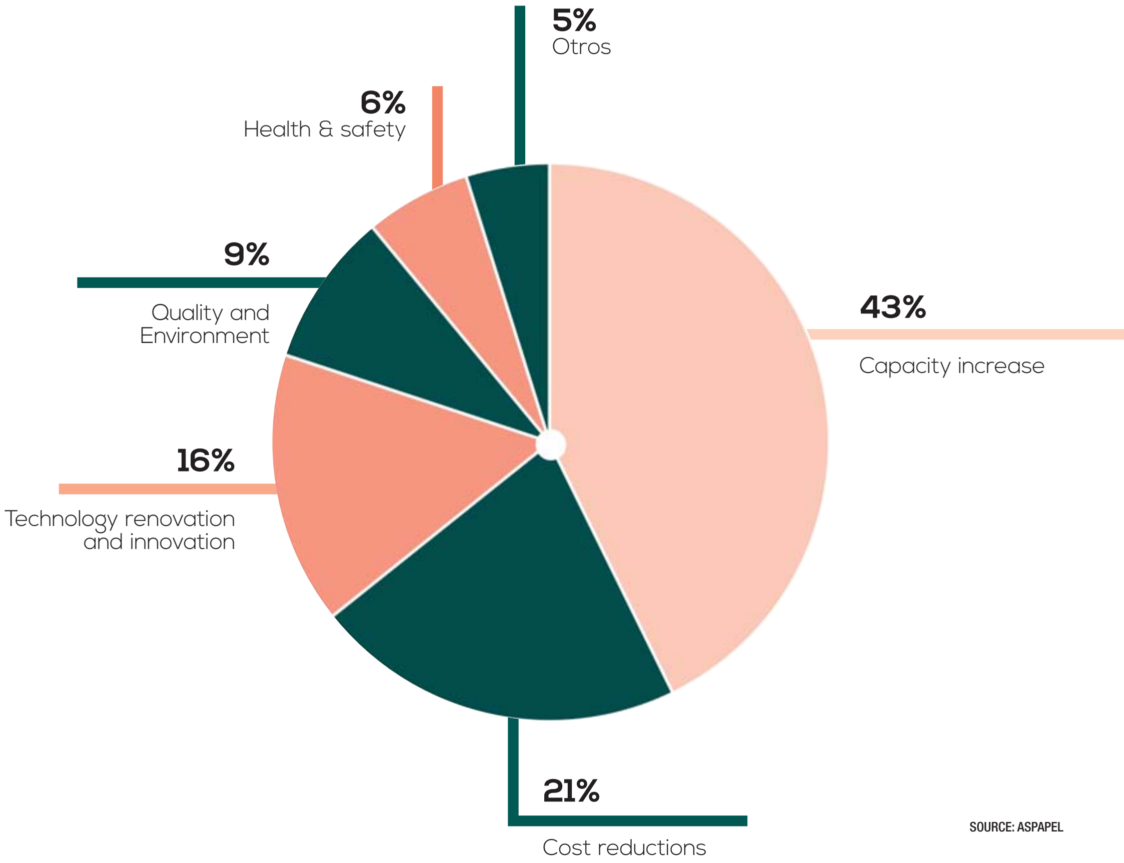
31GR

Investments in Quality and Environment (9%) and Health and Safety (6%), always priority issues for the sector, complete the five major headings in capital investment. Environmental and quality investments (concepts that are closely linked in the papermaking process) amounted to 100 million euros between 2011 and 2014 and account for 16% of total capital investment made in the period. Investments in this regard were primarily aimed at reducing emissions and waste, minimising process waste and improving its valorisation, as well as achieving energy efficiency and savings.

G4-EN31

Paper sector capital investment 2014

22GR I 31GR I G4-EN31



SOURCE: ASPAPEL

G4-EC7

Pulp and paper production sites

SOURCE: ASPAPEL

Business in the paper sector, in terms both of raw material procurement and industrial production in its 77 mills spread across the country, generates investments in infrastructure and services that enhance the environment and benefit the entire community.

G4-EC7

SOME EXAMPLES OF INFRASTRUCTURE AND SERVICES THAT BENEFIT THE LOCAL COMMUNITY

- **Wood procurement**
  Contribution to cleaning forest stands and building and maintaining forest access roads
- **Procurement of paper for recycling**
  Contribution to cleaner streets and smaller landfills.
- **Manufacturing**
  Improves access roads, extension and quality of electricity grids and gas distribution nets, installation of a municipal sewage plant where none existed previously, improved stability of the electricity system, grid and transformer stations thanks to the sector's CHP plants.

Paper industry, innovation

31GR

The Spanish and European paper industry has a very clear vision of its future: as the forest-based bio-industry, in 2050 it will be the key sector in the new non-carbon bio-economy based on efficient use of renewable and recycled resources for manufacturing natural products of high added value.

Innovation is the key to achieving these objectives: reducing CO_2 emissions by 80% and increasing the bio-value of production by 50%. To do so, today's best available technologies are not enough, nor are currently emerging technologies: in the next four decades, it will be necessary to develop and implement breakthrough technologies.

To achieve such a technological leap forward, CEPI (Confederation of European Paper Industries, which encompasses national associations, including ASPAPEL in Spain) launched **TWO TEAM**, a pan-European project of co-operative competition. Two European teams made up of a total of 34 high-level technicians and scientists from companies, suppliers, universities, technology centres ... worked on this throughout 2013.

The outcome of their work is eight ground-breaking technology concepts now being developed by consortia of companies, universities and research institutes.

The winning concept allows pulp to be manufactured with minimum energy, emissions and waste by learning from the behaviour of plants. When the plants have no water because of drought or frost, they are able to produce their own liquid. By mixing two solids together, plants are able to obtain liquid at room temperature. That liquid is called DES (Deep Eutectic Solvent). With these new bio-renewable solvents produced by plants, wood can be dissolved by separating its cellulose fibres from the lignin (the glue that binds them together) at room temperature without any additional energy. This technology can also be applied to paper for recycling, by using these natural solvents to dissolve waste ink from used paper and separating the cellulose fibres.

www.unfoldthefuture.eu

Among the seven technological concepts runners-up in the contest was one based on observing penguins. When penguins flee their predators, they do not actually swim in the water but in the air. They release small air bubbles from their feathers which form a thin film around them and enable them to lower friction and move faster. This concept, called Super-cavitation, has been used by the Russians for their torpedoes, and can, for example, be applied to the paper industry to manufacture paper without using water. The fibres are treated to protect them and then suspended in a viscous solution with a concentration of over 40%. The solution is then pressed and the resulting sheet can be turned into the required end product.

Apart from reducing emissions drastically, this technological breakthrough will be a giant step in terms of efficient use of resources (water, energy, raw materials), thus reducing costs, while still enabling us to produce a high added value product.

Paper sector, social action

30GR I G4-S01

As part of its corporate social responsibility strategy, sector companies carry out diverse programs of sponsorship and patronage within the realm of social care, education, culture and sports, in collaboration with local governments and NGOs, thus underlining their commitment to the environment and community where they operate.

Paper's traditional bond with the world of education translates into a special interest by the Spanish paper sector in educational initiatives, especially in regard to environmental issues.

At sector level, ASPAPEL is currently developing and implementing forestry education programmes through the Edufores Foundation and education on recycling through the program *Tu Papel es Importante* (Your Paper is Important) (www.edufores.com) | (www.tupapelesimportante.com).

The *Tu Papel es Importante* program also includes a significant counselling and certification scheme for local authorities to promote good practice in managing the selective collection of paper and board.

ASPAPEL also has collaboration agreements with various organisations such as:

- **APAI Foundation**, for professional training and the integration of young people with intellectual disabilities: collaboration in the development of classroom teaching on the history and cycle of paper, in which young people with disabilities act as group leaders to scheduled school visits.
- **Spanish Association of Paper Historians:** agreement by which support is given to its organisation and structure by sponsoring its bi-annual awards and collaborating in the organisation of exhibitions, publications, etc.
- **Capellades Paper Mill Museum:** agreement by which the sector collaborates in the upkeep of the museum and its work.
- **EMOZ Origami Learning Museum of Saragossa:** agreement to support this pioneering initiative in Europe.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- **Polytechnic University of Catalonia:** agreement to promote the *Master degrees in Fibrous Material Technology Engineering, specialising in Paper and Graphics*, at the School of Engineering in Terrassa. Under this agreement, students will have in-site practicals during their studies and will be able to do their end-of-course dissertation at sector companies members of ASPAPEL.

The paper chain: raw materials

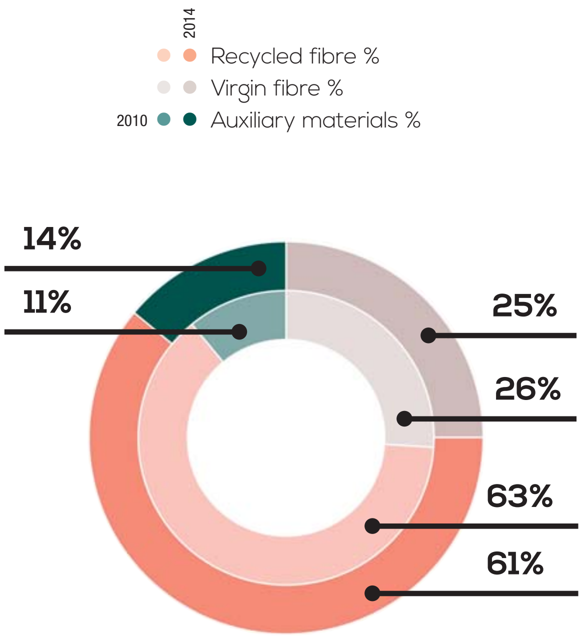
24GR I G4-EN1 I G4-EN2 I G4-EC9

To make paper, the basic raw materials used are virgin fibre, recycled fibre and auxiliary materials (starch, kaolin, glues, dyes ...), which are mainly used to give the paper certain characteristics depending on its end use.

Fibre accounts for over 85% of all raw material procurement - these are cellulose fibre from pine and eucalypt wood grown in plantations and, therefore renewable, either virgin (new or used for the first time) or recycled, which are fibres from the same wood at a different stage in their life cycle, once the product they were in has been incorporated into the recycling circuit after being used.

Fibre for recycling - a material of value - accounts for over 60% of the raw materials used by the Spanish paper making industry.

Besides the use of **renewable and recyclable raw materials**, which are recycled massively, the sector gives priority to consuming local raw materials. In 2014, 70% of paper for recycling and 78% of wood plantations from which cellulose fibre for making paper was obtained came from domestic sources. Over the period covered by this report, these data have ranged between 80% and 78% for wood and between 70% and 77% for paper for recycling.



G4-EC9

Raw Material procurement (ton)

24GR I G4-EN1 I G4-EN2

	2006	2007	2008	2009	2010	2011	2012	2013	2014
Recycled fibre %	1.992	2.020	1.965	1.743	1.794	1.771	1.847	1.921	1.813
Virgin fibre %	4.673	4.940	4.735	3.997	4.440	4.432	4.409	4.476	4.396
Auxiliary materials % (*)	850	900	850	750	800	866	867	886	1.043
Total raw materials ('000 tons)	7.515	7.860	7.550	6.490	7.034	7.069	7.123	7.283	7.252

(*) In equivalent pulp consumption

FUENTE: ASPAPEL

The Paper Chain, a macro-industry

G4-EC8 I G4-EN30

Papermaking in Spain has a very widespread and positive economic impact. The paper chain, from the forest, through pulp and paper making and its transformation into all kinds of paper products (boxes, bags, books, newspapers...), right through to its collection and treatment for final recycling in a paper mill, thereby closing the cycle, is a powerful value chain that creates employment and generates wealth.

G4-EC8

The Paper Chain Cluster, from plantations for paper, through the pulp & paper industry, transforming and converting industries, printers, book publishers, direct marketing companies, to companies specialising in the recovery of used paper and board, account for 3% of Spanish GDP, with a turnover of € 31 billion, 219,000 direct jobs and 657,000 indirect jobs and 12,800 enterprises, according to estimated data from ASPAPEL and associations representing the various sectors.

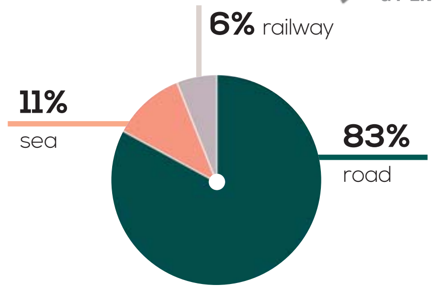
- Paper plantations represent 4,660 direct jobs in rural areas, relating to re-afforestation and husbandry of these wood crops in eucalyptus and pine plantations for use in the paper sector.
- On top of that direct employment, a further 15,378 indirect jobs (machinery, transport, workshops ...) can be added, which together are s significant instrument in boosting rural development. The Spanish paper industry, with 77 mills and a turnover of 4.141 billion Euros, provides for 16,570 jobs.
- Transforming companies (manufacturers of corrugated packaging, paper bags, writing paper, envelopes, notebooks, …), printers, book publishers and direct mailing companies, with 12,600 companies and a turnover of € 26 billion, provide direct employment for 193,000 people.
- The recovery sector, according to Repacar, has 102 companies, a turnover of 705 million Euros and directly employs 3,060 people.

Another significant heading in terms of economic - and also environmental - impact is the **transport** of both raw materials and finished goods, which for the pulp and paper industry is a priority issue in the sector's sustainability strategy. Every year (data from 2014), the Spanish paper industry moves 10.2 million tons of raw materials (wood, market pulp, and paper for recycling), of which 83% travels by truck, 11% by sea and 6% by rail. For finished goods, the figures are 6 million tons overall production of which 60% is freighted by road, 30% by sea (mainly export destinations), and 10% by rail. The main objectives in this area are to optimise road haulage and improve access to rail freight.

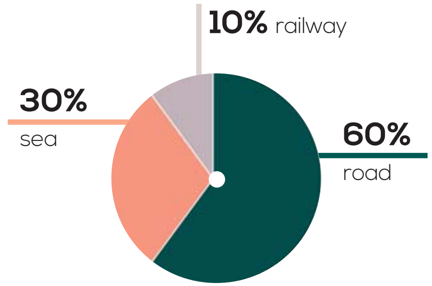
G4-EN30

Raw material freighting
10.2 million tons

G4-EN30



Finished goods freighting
6 million tons



Finally, in regard to the economic **positive impact of the use of the sector's products**, one only has to think of the importance of packaging and wrapping as a marketing tool for a whole variety of goods and their function of protecting goods to ensure they reach the end final consumer in optimum conditions.

Paper products

29GR

Responsible consumption and bio-consumption

Consumer preferences in the 21st century tend, firstly, towards bio-consumption, by choosing products that are integrated in the natural cycle, i.e. that come from nature and are renewable. Furthermore, aware of the need for responsible use of resources, they especially appreciate recyclability and efficiency throughout the product cycle, where waste is turned into new resources as a feature of the new circular economy.

Paper products are natural, renewable, recyclable and bio-degradable, a curriculum that is hard to beat. That is why paper is taking a leading role in various applications in recent years as a replacement of other materials that do not have these environmental characteristics. An example would be paper shopping bags and cartons.

This is a trend that in coming years will spread to other paper products. These environmental features are also an incentive for the paper industry, which uses eco-design to try to release the full potential they hold to progress further towards a circular economy.

MOST VALUED FEATURES OF PAPER-BASED PRODUCTS (over 10)

8.4 Recyclability

7.9 Functionality and product safety

7.6 Natural product

Improving the sustainability of paper products through eco-design is an increasingly important topic. Indeed, the **MainStream project of the World Economic Forum**, which includes three pilot programs to advance the circular economy, has chosen paper and board for one of them, to consolidate a set of universal eco-design and easy-to-use standards which will then lead the way for other materials. **(http://www.weforum.org)**

Consumer satisfaction

G4-PR5

A survey on paper in Spain carried out by SigmaDos for the Paper Forum in 2012 (nationwide coverage, one thousand interviews of the general population over 18 years of age), reveals an index of overall satisfaction with the product of 7.7 out of 10, an improvement on the result of the previous survey (2005) of 0.3.

Among the most highly valued features of paper products (scores out of 10) are recyclability (8.4), functionality (7.9), product safety (7.9), and its natural character (7.6), an improvement in all cases the results of the previous survey.

Consumers state they cannot imagine their lives without paper (91%) and feel it to be closer and more endearing to them than other products and alternative technologies (81%). 93% say that paper and board packaging is the most environmentally friendly. 87% consider that, in a sustainable economy, the co-existence of paper and electronic books is appropriate. And 77% of respondents consider that paper should continue to be used for newspapers and magazines in the future.

Spanish consumers not only support current paper products but are willing (68%) to use new products such as smart packaging, batteries, cosmetics and cellulose fibre-based medicines...

Product Safety

DMA

One of the aspects most valued by consumers is precisely product safety. The Spanish paper industry is committed to the quality and safety of its products, and especially those intended to come into contact with foodstuffs as part of food packaging.

Given that to date, no specific measures for paper and board have been introduced in the EU, the sector has proactively self-imposed specific control measures and in 2010 collaborated in the publication of an Industrial Guide to determining compliance of paper and board materials and articles for contact with food in accordance with the most stringent European regulations on the matter.

Following the recommendations of the Industrial Guide, a growing number of companies are obtaining safety certifications for their products, to validate the results of such self-control by certifying their compliance with applicable regulations and assuring the consumer of the quality of paper and board for food contact.

Similarly, in 2010, the sector contributed to the drafting of Good Manufacturing Practices for Paper and Board for Food Contact, which start by recommending checks to ensure all procured raw materials come from duly identified and approved suppliers.

Those controls must also ensure traceability throughout the process up to the end product and must enable assessment of the level of risk in order to establish proper management depending on that assessment.

Over the period covered by this Report, work has taken place to implement the Guidelines and Good Practices. The Spanish paper industry promotes paper product safety throughout the value chain, involving all actors in the chain in its commitment to consumer health. It also works at national and supra-national levels with legislators and regulators to establish the necessary measures for the protection of health and the protection of consumer interests.

COMPLIANCE ASSESSMENT CHART FOR THE MANUFACTURE OF PAPER AND BOARD IN CONTACT WITH FOODSTUFFS

Raw materials	Responsible procurement of pulp and recovered paper
	Requirements for recovered paper
	Requirements for chemicals and additives
Process	Good Manufacturing Practice/ Hygiene Management System
	Quality Management System
	Traceability
Product	End product compliance testing

Objectives

Fulfilment

Seven objectives had been set for the period 2011-2014 in the field of the sector's and its products' social and economic performance.

1. Sector objectives in this area in terms of **improving competitiveness:** in 2011-2013, we managed to improve our domestic market share and exports, which enabled production rates to be maintained despite the crisis and falling domestic demand. However, this trend was broken in 2014, largely due to the impact on the sector of new regulations for electricity production.

2. As regards **logistics and transport**, raw material access to rail freighting was improved (2010: 5.3% / 2014: 6.2%) and even more so for finished goods (2010: 3.9% / 2014: 10%). Likewise, progress was also made in optimising road transport with an increase in PMW (Permissible Maximum Weight) for articulated lorries with 5 or more axles from 40 to 44 tonnes in Spain, for which the sector collaborated on a study drafted by INECO and submitted to the Administration.

3. At ASPAPEL, we continued to work to help **forestry education** (www.edufores.com), with new printed and online teaching resources (Forest Friend, colouring notebook, school competition ...) and by participating in courses, seminars, conferences .... We should also mention the launch in 2012 of the paper and environment website (www.graciaspapel.es).

4. **Educating about Recycling** was another priority for the sector, with a newsletter called Reciclaje al Día (Recycling Today) - published 3 times a year,- the program of technical advice and certification called *Tu Papel 21* (10 municipalities certified in the period, press conferences with the town councils and re-design and re-launch of the program's corporate identity), participation in workshops, courses, conferences... (www.tupapelesimportante.com)

5. Throughout the period, relations with **stakeholders** were intensified with the annual publication of updated data for our three-yearly Sustainability Report and through the implementation of a broad online poll, with more than 300 participants.

6. Progress was also made in the field of **responsible consumption and bio-consumption**, with the publication of the *Practical Guide to Buying Paper* and integrating the concept in different communication actions (websites, social networks, publications and videos, actions with the media, etc.).

7. **Product safety** was another priority during the period. Noteworthy in this area is the Good Manufacturing Practices Guide, which recommends that all raw materials be procured from identified and approved suppliers, that traceability is guaranteed and the risk level of the product known. A growing number of companies hold compliance certification for their end product and our close collaboration with national and supranational legislators and regulators, involving all actors in the chain, has also been maintained.

New

As its objectives for the period **2015-2017**, the paper sector intends to further some of the above objectives and also adds transition towards the paper circular economy.

1. To contribute to **improving competitiveness,** with increased investment and actions to attract talent and capital.

2. To work for **sustainability and safety of transport** in three lines of action: regulation of weights and sizes (increase loading to at least 44t), implementing CEPI recommendations on cargo securing methods and creating an ASPAPEL working group network on Transport to train - communicate - report.

3. To contribute to **forestry education** with new teaching resources, teacher training, a new edition of the school competition and renewal of the Edufores website.

4. To contribute to **education on recycling** by continuing the program *Tu Papel es Importante* (redesign the newsletter, renew certifications, transparency about end recycling on municipal websites).

5. **Transition towards the paper circular economy** by improving information on how efficiency is evolving throughout the paper cycle: raw materials, manufacturing, products and end of life.

6. Continuous improvement in **product stewardship** through collaboration in the development of regulations and improving communications, dissemination and promotion about the safety of paper for contact with food.

Objetives in generation of wealth and contribution to quality of life

FULFILMENT OF OBJECTIVES 2011-2014

1. CONTRIBUTE TO IMPROVING COMPETITIVENESS

Share of domestic paper market (%)

2010: 49 | 2011: 51 | 2012: 52 | 2013: 52 | 2014: 50

Pulp + paper exports (million tonnes)

2010: 4 | 2011: 4.2 | 2012: 4.1 | 2013: 4.3 | 2014: 4

2. TRANSPORT AND SUSTAINABILITY

INCREASE TRUCK LOADING

INECO report. Submission to the Administration

ACCESS TO RAIL FREIGHTING

Rail freighted raw material in % of total

2010: 5.3% | 2014: 6.2%

Rail freighted finished goods in % of total

2010: 3.9% | 2014: 10%

3. CONTRIBUTE TO EDUCATION ON FORESTRY

· New printed and online teaching materials
· Participation in courses, workshops, conferences...

4. CONTRIBUTE TO EDUCATION ON RECYCLING

· Tu Papel 21 certification · Recycling Today newsletter
· Courses, workshops, conferences...

5. STRENGTHEN RELATIONS WITH STAKEHOLDERS

Yearly reports and contact to hear their opinions
· Annual updates · Online survey (300 participants)

6. FROM RESPONSIBLE CONSUMPTION TO BIOCONSUMPTION

Report and publish materials
· Practical Guide to Paper Purchasing
· Integration of concept in communications

7. PRODUCT SAFETY AND CONSUMER HEALTH

· Implement Good Practice Guide
· Growing number of companies with end product compliance certification
· Collaboration with legislators and regulating bodies

NEW OBJECTIVES 2015-2017

1. CONTRIBUTE TO IMPROVED COMPETITIVENESS

· Increase capital investment
· Actions aimed at attracting talent and capital

2. SUSTAINABILITY AND SAFETY OF TRANSPORT

· Weight and size regulations (increase truck loading to at least 44 ton)
· Implement CEPI recommendations on securing cargo
· ASPAPEL network on freighting issues to train – communicate – report

3. CONTRIBUTE TO EDUCATION ON FORESTRY

· New teaching resources
· Training for teachers
· Competition for schools
· Renew Edufores website

4. CONTRIBUTE TO EDUCATION ON RECYCLING

Continue program (redesign newsletter, renew certificates, transparency about end recycling on municipal websites)

5. MOVE TOWARDS THE CIRCULAR ECONOMY OF PAPER

Inform about how efficiency evolves throughout the entire paper cycle:
• raw material
• manufacturing
• products
• end of life cycle

6. PRODUCT STEWARDSHIP CONTINUOUS IMPROVEMENT

· Collaborate in development of regulations
· Improve communications, distribution and promotion of safety of paper in contact with foodstuffs