



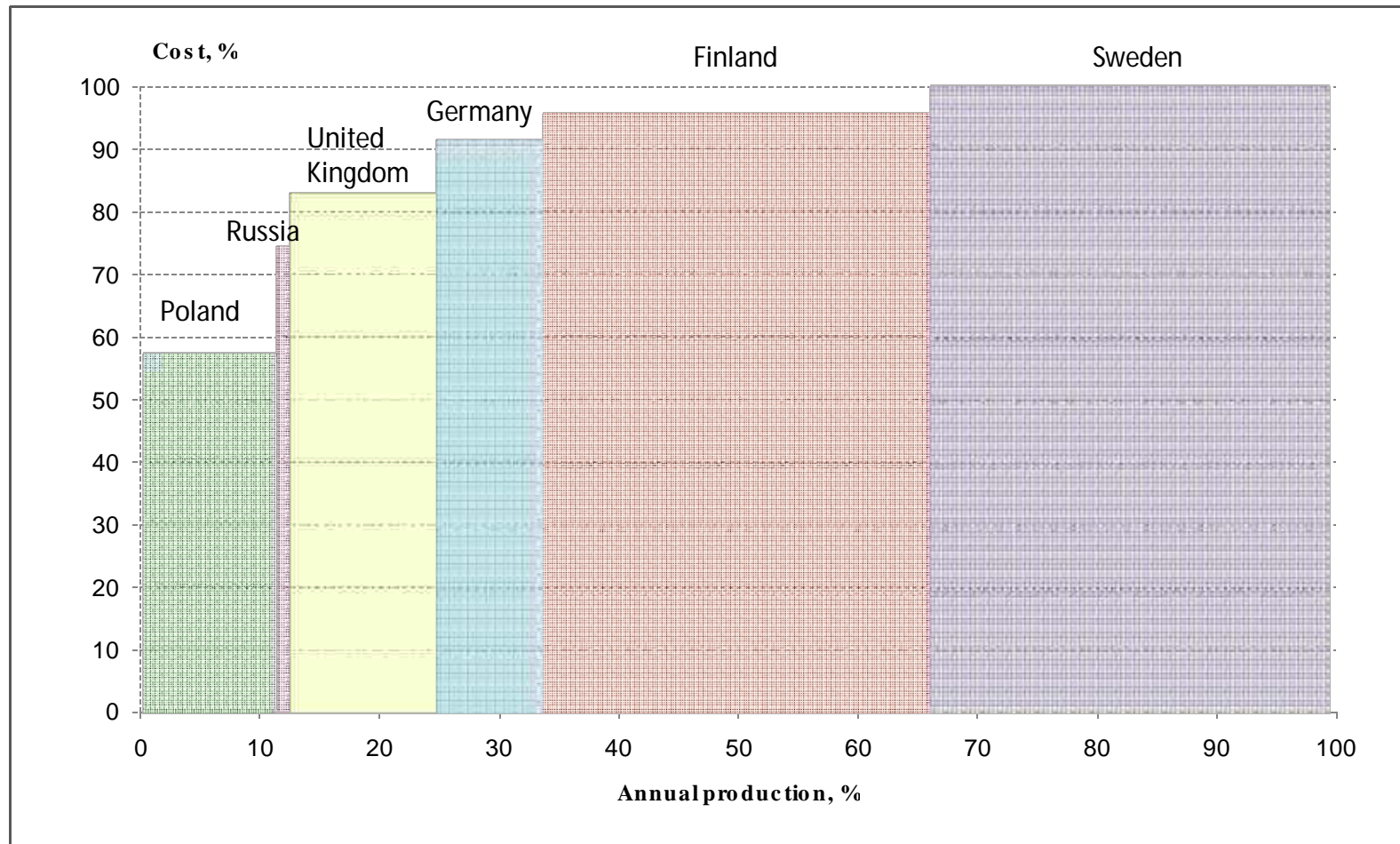
Resources and capabilities in the changing paper industry

By: Rainer Hägglom
Hägglom&Partners
Rainer.Haggblom@haggblompartners.com
Tel. +358 40 555 9567

Statements

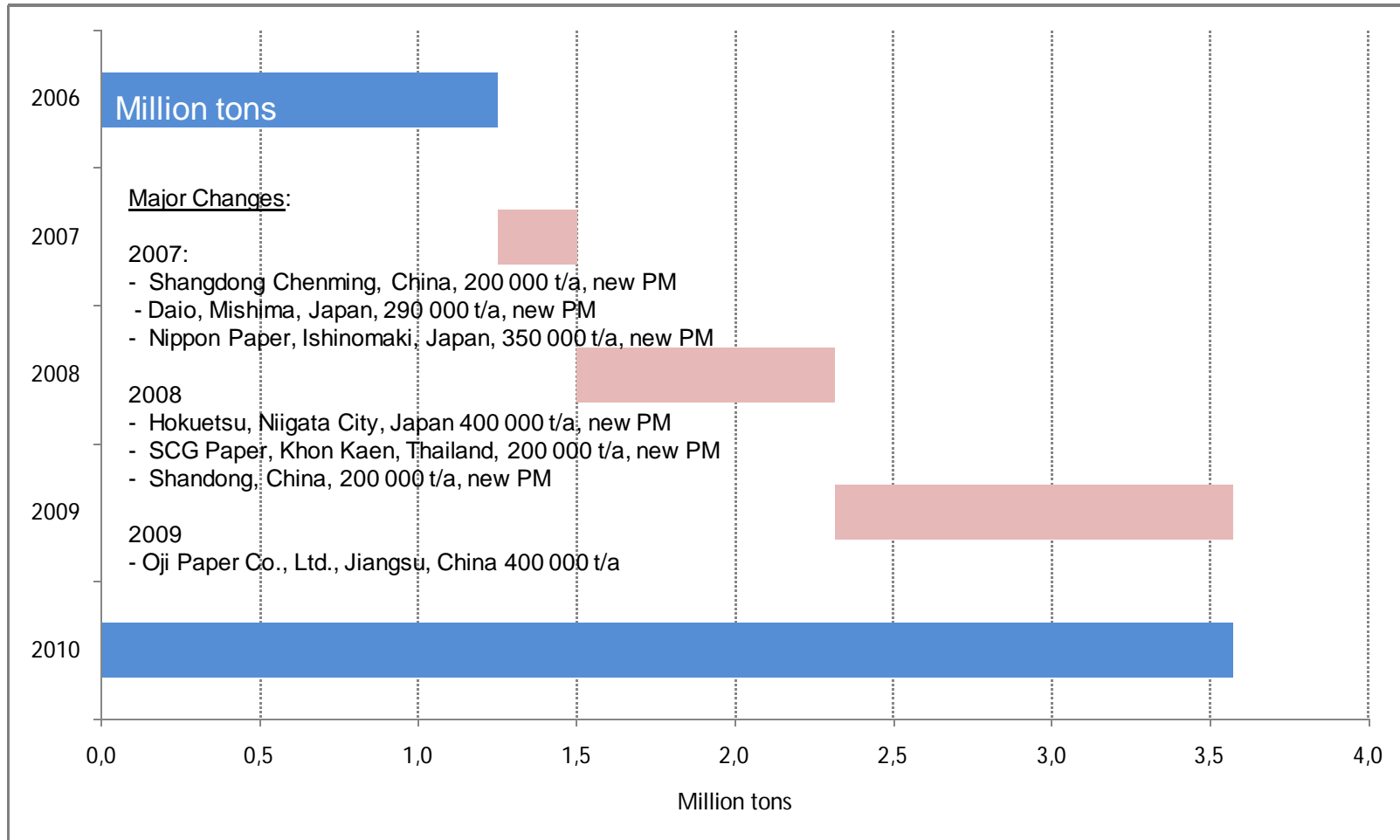
1. Forest industry needs extreme efficiency in Europe and ability to grow in emerging markets.
 2. Asian paper is going to take over European industry – applying the same technology as in Europe.
 3. Fast growing plantations result in megasites in pulp production – new skill set required.
 4. Future of paper industry in Europe is in advanced environmentally sound concepts and cleantech/envirotech and multiproduct processes.
-

Cost competitiveness - Cartonboard



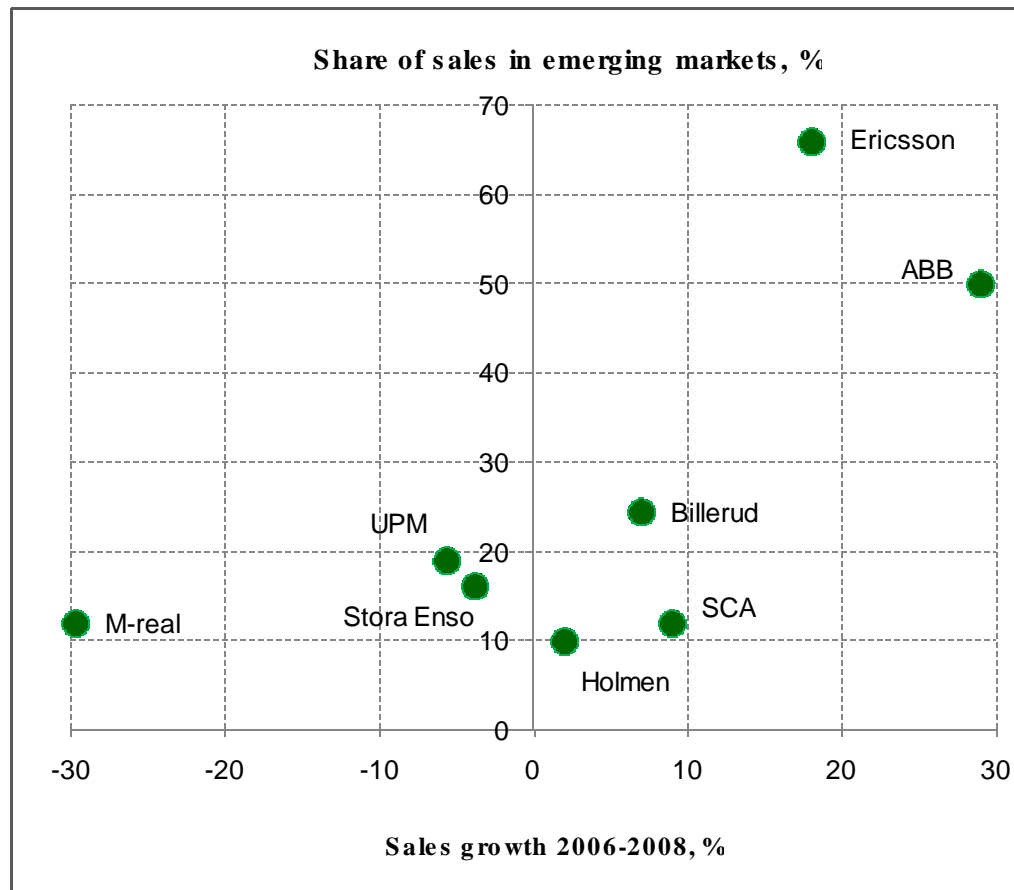
Source: Fisher International

Changes in coated paper production capacity in Asia



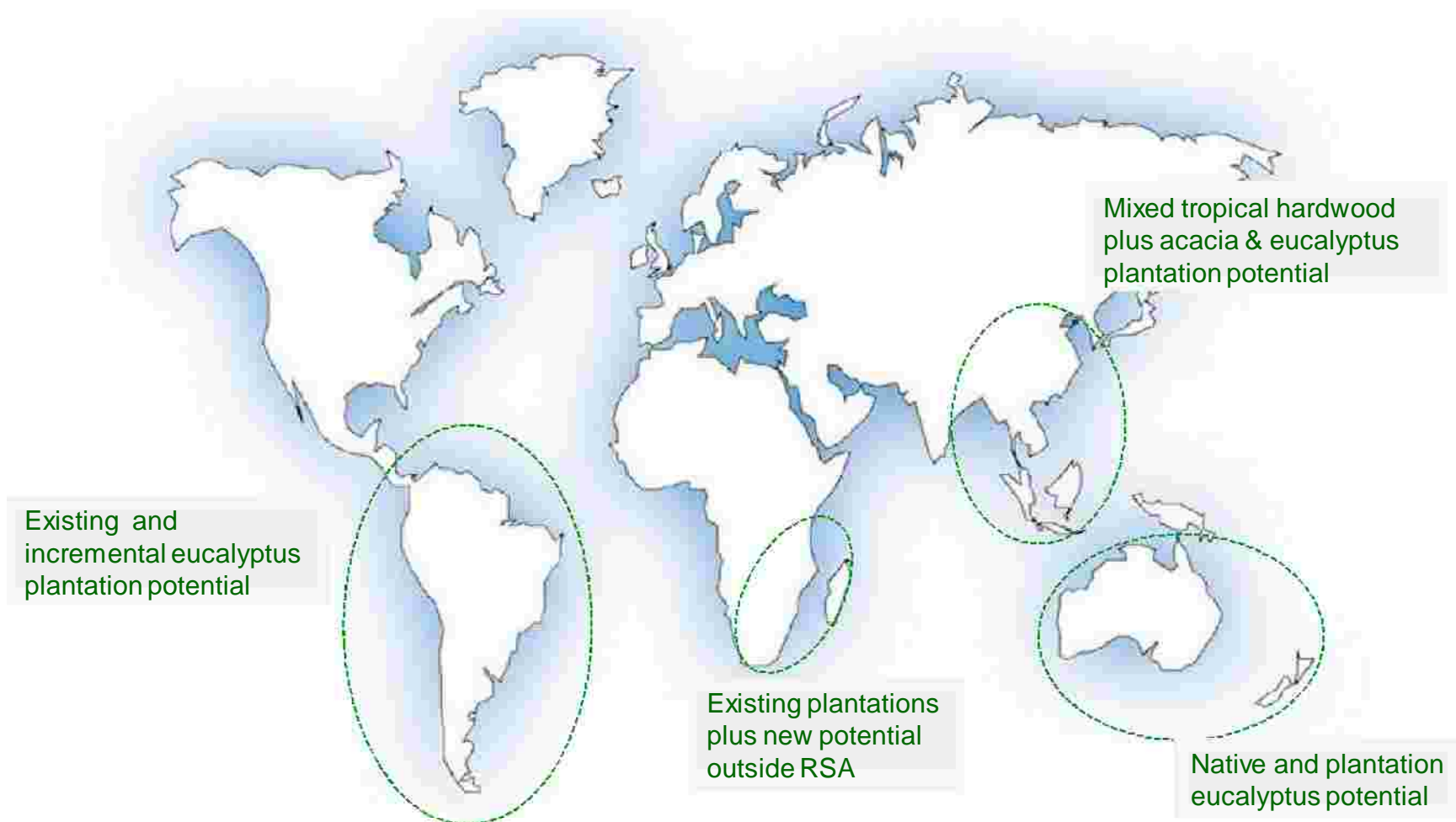
Source: Forestweb

Future success in geographical growth

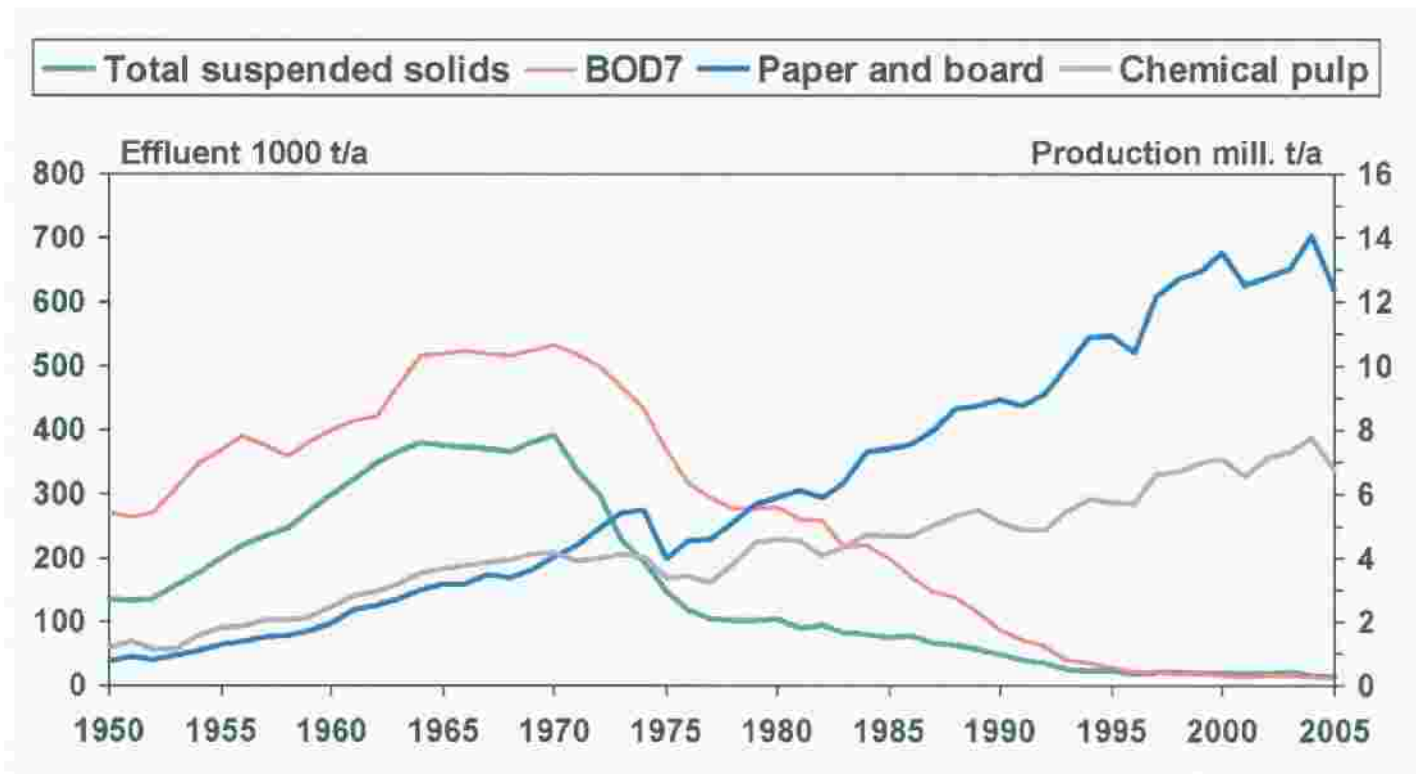


Source: Dagens Industri,
Vision Hunters

Where will hardwood pulpwood come from – and produced by whom

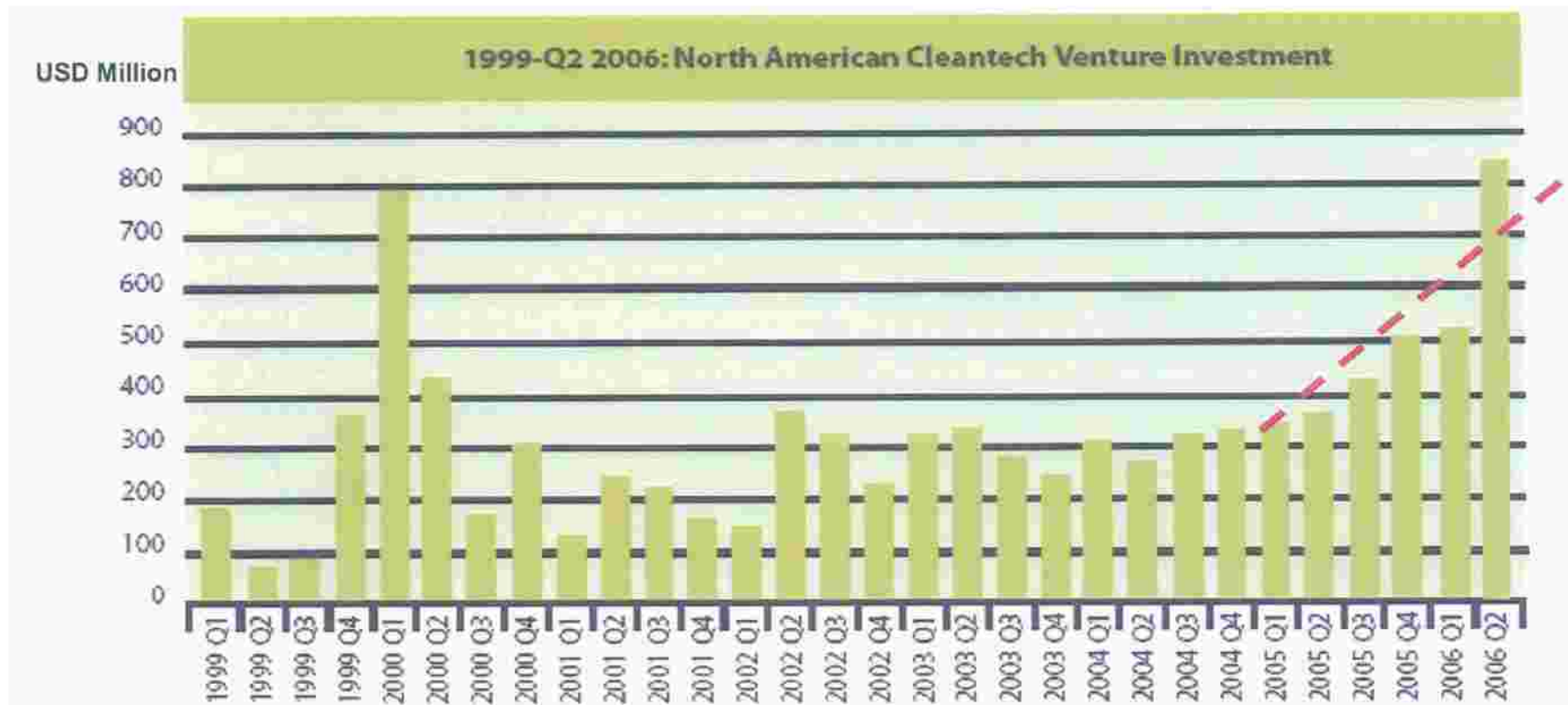


Significant improvement in environmental technology in industrialized countries (Finland)



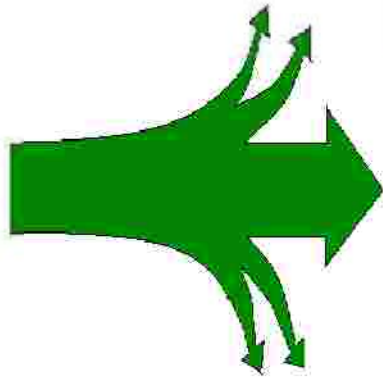
Source: Finnish Forest Industries

The opportunity?

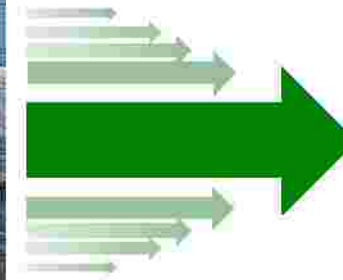


Source: Cleantech Venture Network

Two major cornerstones for success and change



Source: Vastavalo.fi



Control of raw materials

Optimum use of raw material according to value

Multiproducts-marketing alliances
