



Sustainpack

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Instrument: **IP**

D 1.4 National Datasets

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Organisation name of lead contractor for this deliverable
Pira International Ltd

Revision [1]

1.1 Introduction to the deliverable

An important activity within Sub-Project 1 – Technology Mapping of the Fibre-Based Value Chain is the production of a fibre flows analysis for the ERA (Work Package 1.1). Within the work programme for WP1.1, the completion of the data collection for this analysis is marked by the delivery of national data sets from each WP partner to the WP leader (Pira International). The delivery of this data is recognised in the SUSTAINPACK proposal as a deliverable, D1.4 National Datasets, to be completed by the end of Month 8 of the project (end January 2005).

This document provides a report summarising D1.4. The full data sets are not provided in this report, as these are contained in a series of detailed Excel spreadsheets, which are currently being interrogated to produce fibre flows maps and analysis.

1.2 Overview of the data received

Data has been generated for all countries in the ERA, namely:

- **Austria (covered by Partner 11 PTS)**
- **Baltics (Lithuania, Latvia, Estonia) and Slovenia (covered by Partner 12 Pira)**
- **Belgium (covered by Partner 11 PTS)**
- **Denmark (covered by Partner 6 DTI)**
- **Eastern Europe (Slovakia, Czech Republic, Hungary, Poland) (covered by Partner 23 STUBA)**
- **Finland (covered by Partner 12 Pira)**
- **France (covered by Partner 4 CTP)**
- **Germany (covered by Partner 11 PTS)**
- **Greece (covered by Partner 12 Pira)**
- **Italy (covered by Partner 12 Pira)**
- **Netherlands (covered by Partner 11 PTS)**
- **Norway (covered by Partner 6 DTI)**
- **Spain and Portugal (covered by Partner 10 ITENE)**
- **Sweden (covered by Partner 1 STFI-Packforsk)**
- **Switzerland (covered by Partner 4 CTP)**
- **UK/ Ireland (covered by Partner 12 Pira)**

In all cases except Spain and Portugal, this data has also been reality checked locally by appropriate trade associations and material organisations. It was agreed within the WP that the researchers covering Spain and Portugal could have until the end of February 2005 to complete reality checks, as difficulties were encountered securing appropriate meetings prior to the Christmas and New Year holidays.

The data generated by local WP partners has mostly been provided in the format of the excel spreadsheet proforma, generated by Pira as part of deliverable D1.3 Data Collection Guidelines and Protocol. Some key comments on the data are:

- data is usually consolidated as country data rather than by individual mills – this level of detail caused most problems and it took considerable time trying to contact individual mills who then expressed concerns about confidentiality
- import and export figures are lacking for most countries
- very little data has been found on converters operations and what is available is very inconsistent; some countries provide good details, but most lack any information altogether
- data on recycled fibre is lacking but can be mostly covered with CEPI data

Some specific problems encountered were:

- the term flexible packaging used in the data collection protocol proved to be too vague, causing confusion during data collection – instead, we need to revisit and look at kraft paper rather than categorising flexible packaging paper by end use; data on kraft paper also very patchy since it is hard to determine what kraft paper will later be used in packaging at the stage of production

- end use applications for most categories were not readily available (especially not at the level of detail requested). Corrugated board is an exception as there is good data by FEFCO
- all countries only provided current data – no forecasts were provided for future production trends
- data in most cases not delivered in the highest level of detail (applications), but rather in the lower level of detail of categories (e.g. corrugated, carton, sack kraft). Categories with the best data are carton and corrugated
- the data will not shed any light on capacities, since the mills are reluctant to disclose this information; so far, Pira has assumed a 80 – 85% capacity for its data and assumes that data collected by associates reflect current production rather than capacities
- overall, data has been collected, recorded and interpreted by many different people and methods – this needs to be taken into consideration when starting the analysis.

1.3 Next activities

The next task is for the WP leader (Pira International) to consolidate and rationalise the data. As part of this activity, the specific data issues identified above will need to be addressed.

Once the data has been consolidated and rationalised, it will be interrogated using a series of “what if” scenarios, to evaluate the potential barriers to and implications of the SUSTAINPACK material research sub-projects (SP2-6).