**The British Wood Pulp Association**

**The British Wood Pulp Association** (BWPA) was founded in 1896. From the beginning the main objectives

of the Association have been:

► To further the interests of the wood pulp trade by the exchange of information and views

► To establish relations with kindred associations at home and abroad

► To collect statistics relating to the wood pulp industry

► To recommend and adopt a uniform contract note and a system of drawing and testing samples

► To assist in the negotiation of rates and charges for shipping and other logistics services

► To assist in any litigation that may aff ect the general interests of Wood Pulp importers

The BWPA has 31 full members and 3 associate members representing pulp manufacturers from around the world. The BWPA has held a dinner almost every year since its inception, the only notable exceptions being during the two World Wars and in 1930-31 due to the Great Depression. The BWPA Symposium was fi rst held in 1976 and has been organised in conjunction with Hawkins Wright since 2001. Visit the new BWPA web site: ***www.bwpa.org.uk***

**Europulp**

The BWPA is a founder member of Europulp, the federation of national associations of sellers of wood pulp in Europe. Founded in 1999, Europulp began with member associations from Benelux, France and the UK. They were soon joined by the associations from Germany and Switzerland and subsequently from Italy and Spain. Europulp represents independent pulp sales companies as well as the local sales offi ces of the major pulp manufacturers wherever they may be. Europulp is known principally for its widely used European Port Pulp Stock fi gures, published monthly. These are in turn used by many of the major trade publications and reports as a barometer of the balance between supply and demand in Europe.

Europulp believes in an open transparent fl ow of information aimed at helping good decision making by both members’ principals and their customers.

**Hawkins Wright**

**Hawkins Wright** is an independent British consultancy providing a range of strategic, forecasting, market

intelligence and business information services to the international forest products industries. These services

include regular multi-client reports and newsletters as well as consultancy assignments for individual clients.

These include pulp and paper manufacturers, fi nancial institutions, equipment and raw material suppliers,

and national, state and provincial governments.

Our multi-client reports and services include:

► **The Outlook for Market Pulp Supply, Demand, Costs and Prices**. Companies controlling 90% of global market pulp capacity subscribe to this service. It includes an in-depth report published three times a year, regular updates and our response to any ad hoc questions throughout the year.

► **Defi ning the China Market for Pulp, Paper and Board**. This annual report, now in its eleventh edition, provides a uniquely detailed analysis of the Chinese industry and its prospects.

► **The Outlook for Dissolving Pulp demand, supply and prices.** Published quarterly, this multi-client service provides a detailed historical analysis and forecast of this fast growing sector. In addition to a detailed supply and demand analysis by grade and region, the report contains production cost estimates and a fi ve year price forecast. The report also provides wider analysis of the textile markets and the pulp and paper industry, in order to present the sector in its proper context.

► **Pulpwatch**, a monthly newsletter and dedicated web site covering developments in the international pulp market.

► **Forest Energy Monitor** tracks developments in the rapidly expanding market for biomass and wood pellets. Published six times a year, the report analyses market prices for pellets and biomass, new bioenergy investments and technologies and developments in policy and legislation.

For more information about any of these reports or services please contact us at:

Hawkins Wright Ltd. 2a Blake Mews, Kew, Richmond, Surrey TW9 3GA, UK. Tel: +44 20 8747 5840;

Andrea Boltho

Professor Andrea Boltho, Emeritus Fellow, University of Oxford, was educated in Italy and at the Universities of London (LSE), Paris and Oxford. He worked at the OECD’s Department of Economics and Statistics from 1966 to 1977 where he was Head of the Growth Studies Division and Editor of the Economic Outlook. After a year in Tokyo as Japan Foundation Fellow at the Research Institute of the Economic Planning Agency, he spent 30 years as Fellow and Tutor at Magdalen College, University of Oxford, where he specialized in international and applied macroeconomic issues. Since 2008 he has been an Emeritus Fellow. His other positions have included consultant to the World Bank, the OECD and member of the Academic Council of the IFO Institute, Munich. He has been a Member of the Board of Finmeccanica and is presently a Director of Oxford Economics.

Marcelo Castelli

Marcelo Castelli is Fibria’s CEO. He has 27 years’ experience in the pulp & paper industry.

He has accumulated knowledge about operations, logistics, procurement and commercial and corporate strategy over a number of years, enabling him to build a broad view of the business.

His previous positions include other top pulp & paper companies in Brazil.

Marcello graduated in Mechanical Engineering, specializing in pulp & paper manufacturing, and has also obtained an MBA from the Dom Cabral Foundation, as well as participating in several top executive programs in leading business schools, such as IMD (Switzerland), the University of São Paulo (Brazil) and others.

Tom Wright

After training as an accountant, Tom joined Hawkins Wright in 1998. He undertakes most of the private client consultancy assigments on a wide range of topics related to the pulp and paper sector. He is the co-author of the “Outlook for Market Pulp” and makes regular contributions to "Pulpwatch". He is the principal author of the Asian multi-client studies. The “Defining the China Market for Pulp Paper & Board” enjoys industry wide recognition and is now in its eighth year of publication.

Tom travels widely; both in the course of market research and also as a frequent speaker to private meetings and industry conferences.

Brian Dillon

Brian Dillon is Global Sourcing Director Fiber for SCA Hygiene Products responsible for all sourcing activities relating to tissue pulp, fluff pulp and recovered fiber.

Prior to SCA, he worked in the banking, automotive, food & drinks and paper industries and has extensive sourcing, logistics and supply chain experience.

Born in Edinburgh Scotland, Brian is married to Maureen, has two children and lives in Oberursel Taunus, north of Frankfurt in Germany.

Niklas von Weymarn

Niklas von Weymarn has a doctorate in bioprocess engineering. He has also studied economics and innovation strategies. His career began in 1999, when he took on the position of Research Scientist at Cultor Technology Center (Cultor today is part of DuPont). He has held various positions including Project Manager, Team Leader, Program Manager and Technology Manager at Aalto University, VTT Technical Research Centre of Finland and FIBIC Ltd. Niklas is currently Vice President, Research at Metsä Fibre Ltd.

**Programme**

8.15 Registration & coffee

8.45 **Session One**

Welcome from the Chairman, **Mr Sakari Pappila**, President of the British Wood Pulp Association

**Professor Andrea Boltho, Oxford University -** The global economic outlook

**Niklas Von Weymarn, VP Research, Metsä Fibre** - The pulp mill of the future

**10:30   Coffee**

**11:00   Session two**

**Marcelo Castelli, CEO Fibria -** Perspectives from Latin America: Fibria's vision of the market pulp industry

**Brian Dillon, Global Fibre Sourcing Director, SCA Hygiene -** Perspectives from the tissue sector

**Tom Wright, Hawkins Wright -** The outlook for market pulp

**12:30   Lunch**

Following the Symposium, the presentations will be **available to download**. Go to the following address...

**www.pulpweek.co.uk/downloadform**

...and log in as:

Username: **bwpasymposium**

Password: **copyright**