confederation of paper industries

Annual Review
2025-2026

Paper – the sustainable, renewable choice

Confederation of Paper Industries

The voice and face of the UK's Paper-based Industries

The Confederation of Paper Industries (CPI) is the leading organisation working on behalf of the UK's Paper-based Industries. CPI's membership includes the overwhelming majority of the supply chain for paper, comprising paper and board manufacturers and converters, corrugated packaging producers, makers of soft tissue papers, and collectors and processors of paper for recycling.

CPI represents an industry with an aggregate annual turnover of £15 billion, with 50,000 direct and a further 52,000 indirect employees. Members range in size from large multi-national organisations with multiple sites in the UK, to single site SMEs.

CPI unites the UK's Paper-based Industries with the purpose of promoting paper's intrinsic value as a renewable and sustainable fibre-based material, enhancing its competitiveness through seeking appropriate legislation and regulation for the industry and by spreading best practice.

CPI is working to promote:

- a positive image for paper
- secure energy supplies at competitive prices
- resource efficiency within a coherent waste strategy
- the benefits of packaging
- a sustainable UK Paper Industry
- manufacturing as a vital part of a balanced economy
- a competitive, level playing field for the UK's Paper-based Industries

Paper – the sustainable, renewable choice

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President's Foreword

Kevin Bussey
CPI President

"One clear and positive fact was that there were no capacity losses in the Papermaking sector during 2025 for the first time since 2020."

Welcome to our Annual Review for 2025-26. This has been, in some ways, a year of contradictions and resilience. On one hand, turbulence in global trade and increased costs of doing business in the UK have worsened the overall business environment; on the other, we saw a discernable upturn in the last quarter of 2025, which, along with slowly falling inflation, may lead to better times ahead.

Of course, as I write this, the eyes of the world are turned to the Middle East, making predictions for 2026 exceptionally difficult.

One clear and positive fact was that there were no capacity losses in the Papermaking sector during 2025 for the first time since 2020. Looking ahead, there are likely to be many changes during 2026 which will affect the industry for the remainder of the decade. There is new capacity planned, but the challenging business environment remains.

Our team at CPI will continue to push government as hard as possible to make positive policy changes that will support not only our own, but all UK manufacturing.

As you will see in this review, the breadth and scale of work delivered by CPI in 2025 has been simply extraordinary. From packaging to pollution, renewable energy to recycling and everything in between, the team has delivered a huge amount for our membership.

This year has also seen a significant staff change, with Andrew Large leaving his role after nine years leading the organisation. We were delighted to welcome Alex Veitch into the role in the autumn and look forward to more hard work and success in years to come.

After serving as CPI President since November 2023, I stepped down in May 2026 and was delighted to pass the role to David Richardson of Logson Group. My sincere thanks go to members, colleagues, and the CPI team for their support and engagement throughout my time in office.

Kevin Bussey
President

CEO Overview

Alex Veitch
CPI CEO

"The CPI team has worked tirelessly throughout 2025 to reduce the cost implications for members."

2025 marked steady progress for the UK's Paper-based Industries in the UK, which demonstrated resilience in a challenging business environment. For CPI, this year has seen progress and delivery across all our work areas, whether sharing best practice, influencing policy, or promoting the value of our industry.

A good place to start is with CPI's work on health, safety, and wellbeing which is paramount for our industry. Throughout 2025 we supported members at all operational levels with advice and support, while encouraging sites to sign up to the PABIAC pledge to demonstrate their commitment and actions in this space. I am delighted to report that more than 130 sites are now signed up.

Looking next at communications and public affairs, 2025 has been even busier than usual. As well as producing the regular set of briefings, opinion pieces, news articles, e-newsletters and more, the team has found the time to develop an entirely new website, to be launched in 2026 alongside a full brand refresh. The team also ran two parliamentary showcase events in 2025, and a Ministerial roundtable with Mary Creagh MP in early 2026, focused on packaging, recycling, and the circular economy, which are seeing significant regulatory development through Parliament.

Indeed, recycling and packaging has been one of the busiest areas of work in 2025. Highlights include helping shape the Recyclability Assessment Methodology (RAM), securing a 5% threshold for plastic layers within our sector, and convincing government to see reuse and recycling as complementary options. We also helped members comply with EPR rules and ensured access to high-quality paper for recycling.

Energy is another vital area and remains one of the most pressing challenges for our sector. The CPI team has worked

tirelessly throughout 2025 to reduce the cost implications for members, while influencing the future energy and net zero policy landscape. In total our team has brokered energy support worth £149 million in 2025 alone, and been a trusted and influential voice in energy affairs.

Environmental policy continues to evolve, with water availability and resilience remaining critical to mill performance. CPI played a key role in ensuring the Government did not proceed with the removal of the Landfill Tax water discounting scheme. Operationally our sites showed strong environmental performance with most in compliance bands A and B.

Sustainable forestry is another vital issue, and our team advised members on the complex EU Deforestation Regulation, which has now been delayed until late 2026. Trade more broadly continues to cause concern, and we have added additional resource with a new CPI Trade Network Group, and held direct discussions with the Trade Remedies Authority.

Skills shortages remain a challenge to our members, and to help address this problem our team has developed a comprehensive Level 3 Apprenticeship, now being rolled out in several sites, with higher-level qualifications at the planning stage. We are also seeking resolution to the tricky issues around apprenticeship governance being devolved across the UK, leading to complications in accessing levy funds.

On employment affairs we offered members advice, guidance, and support in wage agreement negotiations with trade unions in our sector, while continuing to scrutinise and influence the Government's major reforms of employment law, with further changes due to be implemented this year.

Finally, on a personal note, following on from Andrew Large's successful nine years in charge has been somewhat daunting, so I want to thank the CPI team, Board, Council and all our members for their support and encouragement in my first few months in the CEO role.

Alex Veitch
CEO

Health and Safety

The health, safety, and wellbeing of everyone in our industry remain paramount. Throughout 2025, we engaged widely at all operational levels across the sector by participating in member meetings, collaborating with Unite the Union and GMB, working directly with FOCs and Safety Representatives, and maintaining close contact with health and safety practitioners.

Across all forums, we communicated a consistent message and a unified commitment to improving health and safety outcomes. Our strong partnership with trade unions has been central to encouraging both employers and employees to support the PABIAC Strategy, reflected in the fact that more than 130 member sites now signed up to the PABIAC pledge.

CPI continues to offer confidential, tailored support on health and safety matters. To strengthen the strategy further, we engaged specialists in human factors, accident investigation, and psychosocial risks to deliver targeted webinars. This programme will continue in the lead-up to the CPI Biennial Health and Safety Conference on 7 July 2026.

In addition, as part of the current PABIAC strategy and our commitment to addressing mental health and wellbeing in the workplace, we have broadened our network of industry support and invited The Printing Charity to join the PABIAC Strategic Committee.

Absences Due to Work-Related Ill Health

In 2025, the UK's Paper-based Industries reported a total of 234 absences due to work-related ill health, amounting to 31,769 hours lost.

Mental health issues accounted for the majority of cases:

- **Stress:** 86 absences (36.8%) and 12,486 hours lost (39.3%)
- **Depression:** 26 absences (11.1%) and 4,514 hours lost (14.2%)
- **Anxiety:** 19 absences (8.1%) and 2,567 hours lost (8.1%)
- **Other mental health conditions:** 17 absences (7.3%) and 1,993 hours lost (6.3%)

Overall, mental health related absences represented the largest proportion of both reported cases and working time lost across the industry.

Industry Performance

Compared with 2024, there was an increase in the number of RIDDOR-reportable injuries across the industry. At the end of December, the injury rate stood at 382 per 100,000 employees, representing a 15% increase on the rate in December 2024 (333).

While any increase is disappointing, the industry continues to out-perform the HSE's "All Manufacturing" benchmark of 427 per 100,000 employees.

Where serious risks to life are identified, CPI acts decisively. Our handling of the LPG forklift truck vaporiser issue demonstrates this clearly. CPI's intervention led to the identification of the contamination source, a review of the British Standard for commercial butane and propane, and a product recall affecting three major forklift truck manufacturers.

This level of proactive leadership and collaboration demonstrates our strong commitment to representing the industry and challenging authorities where lives may be put at risk.

CPI continues to drive health and safety progress through our leadership role in PABIAC. We bring together industry stakeholders, trade unions, and the HSE to develop collaborative, practical solutions to shared challenges. The HSE recognises our leadership and expertise, while trade unions acknowledge our genuine commitment to protecting the workforce. As a result, our industry is often highlighted by both the HSE and the unions as a model for other manufacturing industries to learn from.

To further support the industry in delivering the current PABIAC objectives, CPI established three industry working groups (WG) in October.

Each group was assigned a specific focus aligned with one of the three PABIAC objectives.

- **WG1/Objective 1:** Understanding and integrating human factors into health and safety
- **WG2/Objective 2:** Accident and Incident Investigation
- **WG3/Objective 3:** Mental Health and Wellbeing

These groups bring together health and safety practitioners from across the sector, creating greater opportunities for engagement and a broader network for sharing knowledge and best practice.

Challenging Machine Manufacturers and Raising Standards

For several years, CPI has been involved in the development of bespoke machinery standards applicable to the industry.

Building on discussions across Europe and beyond, several countries including the UK share a common interest in strengthening international cooperation to improve machine safety. It is not uncommon for companies to purchase new equipment only to discover that key safety features are missing or have not been adequately considered by the manufacturer.

For CPI members, it is imperative that we represent not only the health and safety interests of the people who work in the industry, but also the commercial interests of our members. This includes challenging machine designers and manufacturers when equipment brought to market does not meet expected safety standards.

Looking Ahead

For the benefit of everyone who works in and supports our industry, CPI remains available to provide confidential, tailored advice on health and safety matters and to assist any member requiring support.

Health and safety is not competitive; it is the cornerstone of responsible and effective management and fundamental to protecting everyone who works in the industry.

This work will continue as we move towards the CPI Biennial Health and Safety Conference, taking place on Tuesday 7 July 2026.

Energy and Climate Change

Energy cost remains one of the most pressing challenges for the UK's Paper-based Industries, with CPI working tirelessly throughout 2025 to ensure members were supported through volatile markets and shifting government policy.

The energy intensive classification of papermaking was retained, allowing most mills to access both the Carbon Price Floor Compensation Scheme (CPF) and the British Energy Supercharger. These schemes help reduce policy costs attached to electricity use, making a significant impact on electricity costs. The Supercharger scheme is already delivering bill reductions of up to £56/MWh for grid supplied electricity (compared to what costs would have been without CPI's action), while CPF delivers an additional refund of around £16/MWh (£11.50/MWh for CHP electricity). After intensive discussions with Government, the value of the network charges rebate (within the Supercharger support scheme) increased from 60% to 90% in April.

CPI also secured a significant win through the Climate Change Agreement (CCA) scheme, extending it to 2033 and reducing the sector's energy efficiency target from 12% to a more realistic 5% through to 2030. This adjustment is expected to save members up to £6.37m. In addition, CPI successfully negotiated a longer period of free allowances within the UK Emissions Trading Scheme avoiding additional compliance costs.

CPI continued to play a leading role in shaping the national debate on net zero. We contributed evidence to consultations on Clean Power 2030, ensuring that the specific needs of paper mills, particularly around grid connections and combined heat and power (CHP) were understood by policymakers. Our advocacy highlighted the risk of de-industrialisation if UK energy costs remain higher than global competitors and positioned the industry as a constructive partner in the transition to low-carbon energy.

These achievements delivered clear value for our members. In 2025 alone, CPI brokered energy support worth £149 million through discounts, payments, ETS allowances, and emission entitlements. By securing reductions in energy-related policy costs, CPI helped lower bills and improve competitiveness. Our work on recycling and decarbonisation ensured that paper remains recognised as a sustainable, renewable material, strengthening the industry's reputation with customers and regulators. Participation in cutting-edge projects like Flue2Chem showcased the sector's innovation credentials, opening doors to new partnerships and investment opportunities.

The global energy landscape in 2025 was shaped by geopolitical instability, with conflicts in Eastern Europe and the Middle East driving uncertainty in supply and pricing, issues that have been magnified in 2026. Domestically, the Government accelerated Net Zero targets, committing to an 81% emissions reduction by 2035 and full decarbonisation of the electricity grid by 2030. While these ambitions are welcome, they pose significant challenges for energy intensive industries.

For UK paper mills, the reliance on natural gas for steam generation and CHP remains a critical issue. Policymakers are increasingly focused on electrification, but grid capacity and connection delays risk slowing progress, with operational costs still remaining a challenge. CPI has consistently argued for a balanced approach that includes continued support for CHP, biomass, biogas, and hydrogen, alongside efficiency and resource-reduction measures. We are also pressing the Government to extend the Carbon Price Floor compensation scheme beyond March 2026.

In 2026, CPI will continue to press for competitive energy costs and practical decarbonisation pathways. Our priorities include:

- advocating for faster grid connections to enable electrification.
- supporting pilot projects in hydrogen, bio-energy and carbon capture.
- reinforcing the case for CHP as a dependable, low-carbon technology.
- securing alignment between UK and EU ETS schemes and influencing the next phase from 2027.
- making the case for a fair Carbon Price Floor compensation scheme.

By maintaining a strong voice in energy policy, CPI will help members navigate the transition to net zero while safeguarding competitiveness and jobs.

Financial support delivered to UK papermaking

£149M **energy support** brokered for members in 2025

£56/MWH **reduction delivered** through the British Energy Supercharger and an additional £16/MWh through CPF

£23M **saved** in avoided CCL taxation through the CCA scheme and an additional £6.37m projected savings from the revised CCA target (2023–2030)

12% → 5% **reduction** in CCA target

Forestry

As papermaking is ultimately based on organic fibres mostly originating from wood, it follows that a positive perception of the industry needs to be underpinned by an understanding of sustainable forestry.

With high UK recycling rates, it makes sense that UK papermaking is based around recycled fibres, with almost three quarters of fibres being from paper and card collected for recycling from UK homes and businesses. However, with some fibres not being available to recycle either due to fibre damage (after repeated recycling cycles) or lost to the system (say as toilet paper or boxes used for long-term storage) then a certain amount of new fibre needs to be added to the cycle.

This virgin material is largely made from wood, either processed at UK mills or imported, but there is increasing interest in alternative fibres from other annual crops.

Sustainable forests

Two mills – Holmen in Cumbria and UPM Caledonian in Ayrshire – process UK harvested low grade timber (largely from Scotland and the north of England) to make mechanically produced pulp used in their own papermaking. Other UK mills use virgin fibre imported as pulp, predominantly conifer pulp from Scandinavia and North America, or eucalyptus pulp from plantations in South America. The types of pulp used depends on the characteristics needed in the paper, such as softness or strength.

With the importance of forests being increasingly recognised, income from the sale of sustainably harvested material is an important element of encouraging forest-owners to keep their land as forest rather than cleared for other uses. Indeed, the amount of forested area in Europe has continued to increase, and the UK is likely to also see an increase in woodland cover as new policies are developed. New forests are likely to be increasingly multi-purpose, balancing nature conservation with amenity, carbon storage and productive uses; all elements that can be compatible with good quality forest management.

UK Timber Regulation

Companies handling timber and timber-derived products (including wood pulp) made or processed within the UK must prove that it has been legally harvested, an initiative strongly supported by CPI members. CPI continues to engage with the UK Regulator and participates on its expert panel.

The focus of Timber Regulation is on legality, but most pulp used in the UK exceeds the legal minimum requirements, and is also certified to ensure that environmental concerns are also properly addressed. CPI continues to support the work of both FSC and PEFC.

Within the EU, the Commission continues to develop enhanced sustainability rules (intended to prevent deforestation and forest degradation) for a number of commodity products through the new EU Deforestation Regulations (EUDR). The scope includes wood-based products and CPI continues to brief members as the scheme develops, in particular including the last minute postponement for implementation, which delayed the implementation of the new rules until the end of 2026.

The Bioeconomy

Growing attention to sustainability and a move away from non-renewable resources has resulted in increased focus on sustainable bio-resources for forestry, where carbon removed from the forest is reabsorbed by new growth, and their scope to support a modern economy by replacing fossil fuel based materials such as plastics. Paper-based products are of course a long-established part of this bioeconomy, with their sustainable nature and ability to be recycled, making such products an increasingly important tool in reducing the emissions of fossil carbon.

Supporting innovation, CPI assisted members through the Flue2Chem project, working with UPM Caledonian, Holmen Board and Paper, and academic partners to explore the use of captured biogenic carbon in chemical supply chains. This £4.4m research programme demonstrated the potential for renewable feedstocks to replace petro-carbons in household products, reinforcing the industry's role in wider decarbonisation efforts.

Environment

The Papermaking sector continued to demonstrate strong environmental compliance across the sector, with the Environment Agency (EA) confirming that most sites operated in compliance bands A and B. This reflects consistently high environmental performance, supported by a continued downward trend in permit breaches as mills strengthen operational controls.

CPI played a key role in ensuring the Government did not proceed with the removal of the landfill tax water discounting scheme, thereby preserving members' ability to invest in separation technologies.

Removal of the landfill tax water discount would have led to significant cost increases for sites disposing of process wastes containing plastic contamination.

Water Resilience and Scarcity

The Papermaking sector continues to operate within an evolving landscape shaped by environmental pressures, resource constraints, and increasing global expectations for sustainable manufacturing. Among these pressures, water availability and water resilience remain key factors influencing mill performance. As climate volatility intensifies, and freshwater sources face growing competition, water management has moved from a compliance topic to a strategic priority across the sector. 2025 saw major developments in water policy, including the Water Commission report and updates to the National Framework for Water Resources, both carrying important implications for the UK's Paper-based Industries, particularly around long-term water availability, regulatory expectations, and collaborative planning.

The Water Commission report reinforces the need for more resilient water management across industrial sectors. It highlights increasing pressure on catchments, the impacts of climate variability, and the requirement for businesses to adopt more efficient, transparent water use practices. For the Papermaking sector, one of the UK's most significant industrial water users the report underscores the value of investment in recycling technologies and improved abstraction management.

The National Framework for Water Resources continues to guide coordinated action between water companies, regulators, and major users. There is emphasis on regional planning and demand reduction. CPI will continue to engage with the regulators and regional water groups to ensure implications for the Papermaking sector as non-consumptive users, are clearly understood.

Looking Ahead

The industry will continue to experience pressure from water scarcity trends and tightening regulations. The EA is currently undertaking a piece of work on Environmental Destination for Water Resources. The environmental destination for water resources identifies where, and by how much, water abstraction needs to change to achieve and maintain a healthy water environment, both now and in the future, as this will impact abstraction licences.

The implications of the Government's Water White Paper will continue to evolve, and CPI will follow its development. This may include increased pressure on industrial water allocations, a stronger push for improved water-use efficiency, and potential future changes to industrial discharge monitoring as regulators move toward automated, real-time reporting.

Although the Papermaking sector is not a significant source of PFAS in the environment, we can expect to see changes in the regulatory landscape. The Government released a PFAS policy paper early in 2026 which lays groundwork for further action potentially more reporting or monitoring requirements over time. CPI will monitor and engage as required to ensure minimal impact on the industry.

Recycling and Packaging

During 2025, CPI played a central role in supporting the UK's transition from policy design to implementation, ensuring reforms strengthen existing high-quality recycling and deliver genuine circular outcomes. As the Resources and Waste Strategy reforms regained momentum, we consistently championed a recycling-based model that values renewability, carbon performance, and system efficiency.

CPI continued to highlight the critical importance of tackling contamination at source. CPI's advocacy reinforced the need for policy frameworks that prioritise material quality and safety, particularly through effective collection systems and clear design standards. The Government's decision to make separate collections for paper is a long-standing CPI position.

Strengthening Recycling Policy

CPI remained deeply engaged in the development of Extended Producer Responsibility for packaging (pEPR), scrutinising fee structures and supporting members in understanding reporting obligations. We also helped shape the Recyclability Assessment Methodology (RAM), securing a 5% threshold for plastic layers within the paper and card category and gaining a seat on the Defra RAM Technical Advisory Group.

CPI also developed a position setting out how reuse and recycling can work together to deliver circular outcomes. This work reinforced CPI's long-held view that reuse and recycling are complementary, not competing systems, while recognising that large-scale recycling remains the most effective and sustainable circular solution for fibre-based packaging.

Driving Collaboration

Collaboration remained central to CPI's impact. CPI led multiple site visits at member facilities, represented members at public forums and ministerial engagements, and contributed expertise through groups including the WRAP Packaging Pact Steering Group and the CIWM EPR Strategic Expert Group. CPI also fed into technical specifications on packaging and recyclability through participation in CEN and BSI committees and contributed to the Circular Economy Strategy for England.

In parallel, CPI continued to oppose proposals to move the End of Waste (EoW) point earlier in the recycling process. Through sustained engagement we defended the principle that true material recovery takes place at the pulper, protecting domestic reprocessors and preventing the emergence of a two-tier recycling system.

Finally, CPI's leadership on standards continued in 2025, including the Design for Recyclability Guidelines, now entering their fifth review.

Delivering Value Through Recycling Reform

These achievements delivered tangible value for CPI members by protecting access to high-quality paper for recycling and strengthening the competitiveness of the UK's Paper-based Industries. Securing separate collections and a robust RAM classification for paper and card will help maintain reliable material supply, reduce contamination-related costs, and underpin efficient mill operations, a position that CPI will continue to advocate for.

CPI's work on EPR fee structures, reuse policy, and reporting requirements provided members with clarity and confidence during a period of significant regulatory change, reducing compliance risk, and helping businesses plan for future obligations. By articulating a clear position on reuse, CPI ensured members' existing high-performing recycling systems were recognised and protected.

2025 was shaped by accelerating reform as the UK moved decisively toward implementing EPR, Simpler Recycling, and wider circular economy ambitions. The reforms, first proposed in 2018, have created a critical opportunity to build a world-class recycling system. CPI has consistently emphasised that success depends not only on delivery, but on ensuring policies work together.

The policy debate increasingly focused on reuse, often framed in opposition to recycling. CPI has worked to reset this narrative, highlighting that circularity requires a mix of approaches and evidence-led decisions. For paper and card, large-scale recycling remains the most effective circular pathway, while reuse plays a valuable but targeted role, particularly in closed-loop or controlled systems.

Internationally, the EU Packaging and Packaging Waste Regulation (PPWR) provides an important benchmark. Its pragmatic approach recognising the complementarity of recycling and reuse and exempting cardboard from reuse targets, reinforces the case for an evidence-led UK approach that avoids unintended consequences.

Looking Ahead

In 2026, CPI will remain a key stakeholder as reforms move into delivery, early review, and

refinement. Priority areas will include unresolved EPR issues such as dual use packaging, definitions, emerging challenges linked to distributor requirements, and further refinement of the RAM to address contaminants beyond plastic and address food contamination, as well as the practical implications of reuse proposals. We will continue to advocate for policy decisions grounded in robust evidence, to ensure reuse initiatives deliver genuine environmental benefits without undermining high-performing recycling systems.

CPI will also continue to press for greater transparency and proportionality within the EPR fee framework. While CPI supports the principles of EPR, concerns remain that current fee structures do not fully reflect materials' environmental credentials and risk incentivising lighter but harder-to-recycle formats, and we will continue to call for a full impact assessment of EPR costs across material streams.

CPI will also focus on ensuring EPR and Simpler Recycling operate in harmony, and PRN and PERN reforms create a level playing field between domestic reprocessing and exports. Work will commence to develop circularity indicators for paper and card, reinforcing the role of paper and card in a circular economy and to develop initiatives to further improve the quality of Paper for Recycling, including research into targeted interventions that can deliver measurable improvements in recycling performance.

Alongside this, CPI will continue to be directly involved in European policy developments, particularly in relation to PPWR, ensuring UK policy remains aligned with international best practice and delivers a truly circular, competitive future for the UK's Paper-based Industries.

Trade

Throughout 2025, significant resource was devoted to following the impact of global macro-economic developments on the UK's Paper-based Industries, especially relating to trade tariffs announced by the USA and proposals for retaliatory action from other countries.

Since Brexit, the UK has had responsibility for its own trade remedies regime and CPI has been building its capacity to support members with trade remedies, should they be required.

Engagement

A new CPI Trade Network Group was formed to keep member companies informed on international developments, and to seek input from members to inform our position. It was established to provide up to date information for members on a regular basis to follow developments. The network has also provided an opportunity for CPI to be informed by member experience.

We have continued as an active member of the Manufacturers' Trade Remedies Alliance (MTRA) and held direct discussions with the Trade Remedies Authority (TRA) and relevant personnel across the Department of Business and Trade (DBT).

The Manufacturers' Trade Remedies Alliance (MTRA) is an industry body that brings a range of trade associations from the Foundational Industries together, enabling them to approach government with one voice. Through MTRA, CPI has been involved in discussions with the Government's Trade Remedies Authority (TRA), seeking to ensure that their process is as simple and effective as possible.

CPI has also held our own direct discussions with TRA and built links with other relevant personnel across the Department of Business and Trade (DBT).

Navigating New Tariff Risks

Actions by President Trump, using the International Emergency Economic Powers Act (IEEPA) to impose tariffs, were described early in 2025 as "the most extensive act of protectionism taken by a U.S. President in almost a century." Other countries and political blocs have introduced or prepared retaliatory measures, with the associated global trade implications.

In addition to the broader trade matters, we followed the separate 'Section 232 investigation' into perceived security issues around lumber and derivative products, including paper.

CPI joined colleagues across other European countries with communications to the American authorities, seeking to avoid any such impacts. While the conclusions of the report placed specific additional tariffs on cabinets and other furniture, paper products were exempt. This a favourable result for our sector.

Looking Ahead

In February 2026, the Supreme Court overturned Trump's tariffs, ruling that the IEEPA "does not authorise the president to impose tariffs". The President has since invoked other means to enforce alternative tariffs.

Otherwise, while the chaotic scenes of 2025 appear to have significantly lessened as we moved into 2026, we continue to follow developments closely.

To this end, we maintain close links with our colleagues in Brussels who speak for all of Europe. We also continue to monitor trade data and seek member input to inform our position.

TRADE

Skills

Like much of the UK manufacturing industry, the UK's Paper-based Industries are facing a challenge with long-serving experts leaving the industry, and there is a need to replace this valuable resource. To address this issue CPI has established an apprenticeship scheme for papermakers.

Papermaking Apprenticeship

CPI has developed a comprehensive Level 3 apprenticeship scheme for the UK's Paper-based Industries. Building on the current activity for papermaking, we are looking to develop qualifications at higher levels (e.g. Level 4 Process Leader) and identify opportunities for other membership sectors.

The apprenticeship programme brings together core papermaking skills with broader process and manufacturing knowledge, helping to strike the right balance between technical expertise and wider industry understanding. This approach supports both apprentices and employers by developing practical, future ready capability across sites.

Previous papermaking cohorts (Sept 2022 – 2024) embarked on a Science Manufacturing Technician (SMT) course, which has now ended. From September 2025 learners have been on a Process Industry Manufacturing Technician (PIMT) core course. The change has given us the opportunity effectively to 'reboot' the apprenticeship, moving on from our initial set up stage, and now developing and planning for the future of the scheme.

Our first cohort graduated in the spring of 2025 and were recognised at the Paper Industry Gold Awards ceremony. It is expected that all future years will be similarly recognised.

Updating the Papermaking Curriculum

As part of the programme 'reboot' it has been recognised that the papermaking content needs to be updated and improved, and an industry group agreed to review the entire curriculum and delivery. This update was initiated in 2025 and is now well underway. We have engaged with members to confirm the Level 2 (L2) content and into 2026 we will plan the subsequent meetings to develop the L3 content. Training timelines will be arranged so that no new learners will embark on the existing papermaking course.

Apprentices receiving their certificates, with Paul Robinson from Catch UK, Jonathan Ashworth, and former CPI Director General, Andrew Large

Supporting Economic Growth and Productivity

The UK Government has stated that it intends to boost technical and vocational skills, to support economic growth and productivity. There will be a prioritisation of youth employment and progression into skilled jobs via apprenticeships and alternative pathways to university.

To achieve the broader skills ambitions it is intended that 50% of university attendance will be replaced with an alternative. There is a goal for two-thirds of young people to attain higher-level skills by 25, underpinned by additional funding for 16-19 training.

It is intended that these initiatives will create a more responsive, inclusive, and demand-led skills system supporting career progression and economic growth.

Looking Ahead

We will endeavour to resolve the problem for mills across the Devolved Administrations that are currently unable to draw down on Levy funding as the provider is in England.

We continue to explore options, both at higher levels and for other sectors than papermaking. Discussions will continue to explore the broader training needs for member companies.

An opportunity has been identified to develop a Level 4 Process Leader course; other training options are also being explored.

Employment Affairs

CPI supports members in the management of their workforces by providing advice and guidance on site-based issues. CPI also negotiates a wage agreement with trade unions covering the papermaking sector. These agreements assist members by facilitating dispute resolution, avoiding site-by-site negotiations, and securing competitive terms and conditions.

Employment Affairs covers the annual negotiations between the industry and unions on pay and conditions. As well as keeping up to date on general economic data and data on pay settlements, the Employment Affairs team continues to maintain good working relationships with the unions' national and local representatives.

Strengthening Industrial Relations Across the Sector

Working in partnership with members and the unions, and within the framework of the National Agreements, Employment Affairs also plays an important role in resolving members' industrial relations issues, so helping to maintain the industry's good industrial relations record.

The dispute resolution procedures within the National Agreement continue to provide a significant benefit for the conforming sites in securing resolution to impasses. Expert guidance and information is available to CPI member companies on working arrangements, dispute resolution, annual hours, organisational change, and general HR topics.

Employment Rights Bill

In October 2024, the UK Government introduced a new Employment Rights Bill, aimed at putting an end to "unfair employment practices", stating that it would make the workplace fairer and more adaptable to modern needs, benefiting both workers and employers, while promoting long-term economic growth.

The Bill proceeded through the Parliamentary process in 2025, with various amendments. The Lords and Commons debated and adjusted provisions on unfair dismissal qualification, guaranteed hours, trade union ballots, and definitions of seasonal work.

Importantly, in November 2025, specific changes were announced, meaning that employees would now only have the right to claim for unfair dismissal after six months, instead of from their first day in a job, as previously planned.

The Bill has now passed into law as the Employment Rights Act 2025 and is presented by the UK Government as the biggest modernisation of UK employment law in a generation. It is part of the Government's Plan to Make Work Pay and aims to boost productivity, raise living standards, and create sustainable economic growth by updating workers' rights to reflect the modern labour market.

Looking Ahead

The Government has now made several announcements related to the Employment Rights Act 2025 and its plans for public consultation. Topics include flexible working, the 'fire and re-hire' reforms, and Agency worker regulations. CPI will be actively following these developments and will seek input from all member companies as required.

As the new Act is enacted there will be a number of changes for employers. It is recognised that member companies may see positive development such as higher employee retention and morale, as well as closer alignment with labour standards in competitor economies. However, there will be increased compliance and administrative costs, particularly for smaller employers adapting to enhanced benefits and enforcement regimes.

Public Affairs

Over the past year, CPI has significantly strengthened its influence across Westminster and Whitehall through a coordinated and proactive public affairs programme. Our work has focused on shaping the policy environment for the UK's Paper-based Industries, deepening relationships with political stakeholders, and ensuring the sector's priorities are clearly understood as Government advances major reforms to waste, resources, and circularity.

Deepening Stakeholder Engagement

Throughout 2025, CPI engaged extensively with ministers, shadow ministers, MPs, and senior officials across Defra, DESNZ, DBT, and Ofgem. These meetings provided opportunities to discuss Extended Producer Responsibility (EPR), Simpler Recycling, packaging reforms, and the competitive position of the UK's foundation industries. Engagements with parliamentarians including Jen Craft MP, Sarah Jones MP, Sarah Champion MP, Mary Creagh MP, and Jonathan Reynolds MP helped reinforce the industry's role in supporting regional economies, decarbonisation, and the transition to a more circular economy. CPI also facilitated a series of site visits for MPs and officials, enabling policymakers to see first-hand the scale, innovation, and environmental contribution of the sector.

Collaborating for Circularity Roundtable with Minister for Nature, Mary Creagh

Raising Our Profile

CPI delivered a strong programme of parliamentary events designed to broaden understanding of the industry's priorities. In March 2025, CPI hosted a parliamentary drop-in session, which attracted MPs from across the political spectrum. The event highlighted the sector's contribution to UK manufacturing, its leadership in recycling, and its policy asks on EPR, recycling reforms, and the Circular Economy Growth Plan. This was followed in November by the Industry Showcase in Parliament, which brought together MPs, officials and industry representatives to explore the sector's economic footprint, innovation, and sustainability achievements. Both events helped strengthen CPI's profile as a trusted, solutions-focused voice in the policy debate.

CPI's Alex Veitch and Dimitra Rappou, Tim Standfast (Smurfit Westrock, Northampton) with Mike Reader MP

Dimitra Rappou, Gavin Richardson and Josh Stell (Boxes and Packaging, Swindon) with Heidi Alexander MP

In early 2026, CPI convened a high-level roundtable, Collaborating for Circularity, held at Portcullis House and co-chaired by Tristan Osborne MP and CPI CEO Alex Veitch, with participation from Mary Creagh CBE MP. The session provided a valuable forum for members, policymakers, and retailers to discuss the alignment of the Circular Economy Growth Plan with wider waste and resource reforms, and to explore how industry and Government can work together to support sustainable growth. The discussion reinforced CPI's role as a convenor of cross-sector dialogue and a constructive partner in shaping future policy.

Alongside direct political engagement, CPI continued to build its visibility through targeted media activity, background briefings and thought leadership. This work ensured that the sector's perspective on EPR, recycling and circularity was reflected in national and trade coverage, further strengthening CPI's position as an authoritative voice on resource policy.

Looking Ahead

To support the next phase of this work, CPI appointed a new Public Affairs Manager, in April 2026. This role will lead the organisation's political engagement strategy for the whole of the business, deepen relationships across Government and Parliament, and ensure the sector remains well-represented as major policy reforms progress.

Together, these activities have reinforced CPI's standing as a credible, influential and solutions-driven representative of the UK's Paper-based Industries.

Dimitra Rappou, Rebecca Lewis and Malcolm Varney (Portals, Bathford) with Wera Hobhouse MP

Communications

Communication remains the backbone of a successful trade association. It underpins collaboration, transparency, and industry growth, ensuring our members stay informed about policy developments, regulatory reform, market trends, and advocacy activity. Through clear and consistent messaging, we strengthen relationships between members, stakeholders and policymakers, creating a unified voice capable of driving meaningful change.

Our Members

Effective communication with our members remains at the heart of what we do. We ensure they are informed, engaged and supported through multiple channels.

CPI News, our fortnightly newsletter, continues to deliver key industry updates, policy developments and important announcements directly to members' inboxes. Our website serves as a central information hub, while direct engagement allows us to provide tailored advice and guidance. Regular member briefings offer deeper insight into critical issues, encouraging discussion and collaboration across the sector.

Keeping members well-informed is essential to helping them navigate industry challenges, respond to regulatory reform and remain competitive in a rapidly evolving environment.

Online

Our website, **www.paper.org.uk**, remains a key platform for disseminating information to members and non-members alike. It provides access to fact sheets, position papers, industry statistics, and policy updates, while the Members Only section offers exclusive access to detailed data, committee papers, and technical briefings.

The redevelopment of our website is now well underway as part of our wider communications strategy. The new website will deliver a more modern, intuitive, and accessible digital experience. With improved navigation, enhanced mobile compatibility, and a refreshed visual identity, the site will provide a clearer pathway to resources and a more engaging environment for stakeholders. This investment reflects our commitment to innovation and to ensuring that CPI remains the authoritative, go-to source for industry information and insight.

Social Media

Our presence across X (formerly Twitter), LinkedIn, Facebook, and Instagram continues to grow, with 2.2K followers on LinkedIn, over 2.1K on X, and over 1.1K on Facebook. This growth enables us to amplify industry messaging and engage wider audiences. We are working on revising our social media strategy and are determined to strengthen our online presence across all platforms, enhancing thought leadership, increasing engagement, and boosting visibility around key campaigns, events, and policy priorities.

Publications and Press

We continue to publish a range of Position Papers, Member Briefings, and Fact Sheets, ensuring members and stakeholders have access to clear, evidence-based information. These materials are regularly reviewed and updated to reflect policy developments and sector priorities.

Our press activity remains strong, with regular statements, opinion pieces, and features across trade media. We are committed to expanding our media reach and increasing coverage of the sector's economic and environmental contribution.

Our team remains available for press interviews on sustainability, recycling, industry innovation, health and safety and policy reform, providing reliable commentary and informed analysis.

Events & Speaking Opportunities

Events remain central to our engagement strategy, providing opportunities for knowledge-sharing, collaboration, and sector recognition. The CPI team continue to play an active role across the industry, hosting and contributing to panel discussions, and speaking at key events and conferences – including the Environmental Services & Solutions (ESS) Expo, Sustainable Packaging Summit, Environmental Packaging Live 2025, Packaging Innovations 2025, SPA Conference, SPA Trade Show, Recycling Expo, and Packaging Innovations. These platforms allow CPI to share insights, represent the paper-based industries, and engage with stakeholders on sustainability, innovation, and policy developments.

We will be holding our Biennial Health and Safety Conference on 7 July 2026 at the Chesford Grange Hotel in Kenilworth. The conference will bring together industry health and safety professionals and experts from the industry, with a focus on PABIAC's three key objectives. This is CPI's flagship event, ensuring that health and safety remains a core priority across the industry.

Alex Veitch, CPI CEO, speaking at The Sheet Plant Association Conference

Looking Ahead

Our communications strategy continues to evolve with a particular focus on preparing for the delivery of CPI's rebrand in Q4, 2026 marking an exciting year ahead.

Through stronger digital platforms, enhanced member engagement, impactful events, alongside a full rebrand refresh we are reinforcing our position as the trusted voice of the UK's Paper-based Industries, ensuring the sector's contribution to jobs, sustainability and economic growth is clearly recognised and confidently represented.

Collaboration

Partnering with organisations like Two Sides, the Printing Charity, the Stationers' Company and, through PABIAC, Unite the Union and GMB, is essential for strengthening our industry. Through collaboration, these relationships drive meaningful change and promote a sustainable future for our industry.

Connect with us:

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- instagram.com/paper.uk_/

Paper Industry Gold Awards

Winners at the 2025 Paper Industry Gold Awards

Celebrating Excellence: UK Paper Industry Gold Awards 2025

On Tuesday 17 June 2025, representatives from across the UK's Paper-based Industries gathered at Stationers' Hall, London, to celebrate innovation, resilience, and progress at the fourth annual Paper Industry Gold Awards. The event brought together manufacturers, converters, and sector leaders to recognise outstanding achievements across seven key categories: Recycling, Sustainable Innovation & Net Zero, Community Engagement, Health & Safety, Skills, Young Talent, and Equality, Diversity & Inclusion (EDI).

The keynote address was delivered by Jonathan Ashworth, former Chief Executive of Labour Together and Labour Shadow Cabinet Minister. He praised the industry's long-standing spirit of ingenuity, highlighting the technical expertise, impressive machinery, and proactive mindset that continue to define the sector. He acknowledged the pressures created by rising energy costs and global uncertainty, while commending the significant progress made in sustainability, recycling, and waste reduction. Jonathan also emphasised the importance of nurturing the next generation of talent, noting the strength and ambition of this year's young professionals and apprentices.

The awards ceremony honoured exceptional contributions across the industry. Saica Pack, Hartlepool, received the Recycling Award for its leadership in circularity and material recovery. The Sustainable Innovation & Net Zero Award was jointly awarded to Holmen Board and Paper and UPM Caledonian, recognising their pioneering approaches to low-carbon production and energy efficiency.

Essity Prudhoe Mill was celebrated for its outstanding Community Engagement work, while Essity Oakenholt Mill took home the Health & Safety Award, with DS Smith Kemsley and WEPA UK receiving Highly Commended recognition in the same category. DS Smith also won the Skills Award for its commitment to workforce development and training excellence.

The Equality, Diversity & Inclusion Award went to DS Smith, with Smurfit Westrock UKI Corrugated receiving Highly Commended status. These honours reflect the sector's growing emphasis on inclusive culture and equitable opportunity.

The Young Talent category was a particular highlight, with two winners and two Highly Commended entries showcasing the next generation of industry leaders. Their achievements reflect not only individual excellence but the strength of the sector's apprenticeship and early career programmes.

Robert McClements, recipient of the 2025 Paper Gold Medal

This commitment to future skills was further reflected in the industry's apprenticeship achievements. The first cohort successfully completed their studies, marking an important milestone for both the Papermaking Apprenticeship programme and the wider industry. Several apprentices also received special commendations for exceptional performance and academic achievement, demonstrating the high calibre of emerging talent entering the sector. Their success highlights the value of structured training pathways and the importance of investing in the workforce of the future.

The final award of the ceremony was the Paper Gold Medal, the industry's most prestigious individual honour. Established in the late 1960s, it recognises those who have shown exceptional dedication and made a lasting contribution to the UK's Paper-based Industries. This year, the Medal was awarded to Robert McClements, whose distinguished 25-year career with BPIF has been matched by more than two decades of voluntary service to the sector. Since retiring in 2024, he has continued to champion the printing industry, mentoring young people and advocating for the enduring value of print in an increasingly digital world. His voluntary work includes securing funding to help nearly 50 young people from challenging backgrounds begin careers in print through the Prince's Trust. As a Liveryman of the Stationers' Company, he has also played a key role in establishing the Excellence Awards and promoting industry careers at major fairs.

The Paper Industry Gold Awards continue to serve as a vital platform for recognising best practice, sharing success stories and inspiring progress across the sector. As the industry navigates complex challenges and evolving expectations, these awards reaffirm its commitment to sustainability, safety, innovation and people.

Looking Ahead

The industry remains focused on driving positive change – from decarbonisation and circularity to inclusive leadership and talent development. The 2025 awards were a powerful reminder of what the UK's Paper-based Industries can achieve when it invests in its people, its processes and its purpose.

Following a review in 2025, it was decided that the Awards would move to a biennial cycle, with the next ceremony scheduled for 2027. This change aligns the Awards with CPI's Biennial Health and Safety Conference, supporting a more balanced and sustainable programme of major industry events, and ensuring each can be delivered with the time, focus and quality they deserve.

Economic/Market Data

The precarious global economy created by President Trump's US trade policy, supplemented in the UK by the Government's budgetary policy, has established an economic climate in which several of CPI's key indices for the UK's Paper-based Industries fell to historic lows during 2025. However, an upturn discernible in the last quarter and one or two favourable movements by key UK economic indicators (e.g. falling inflation) early in 2026 suggest improving demand which may stimulate output. Although, for the first time since 2020, there were no capacity losses in the Papermaking sector during 2025, there are likely to be many changes during 2026 which will affect the industry for the remainder of the decade.

Apparent Consumption of Paper and Board

Consumption of paper and board declined once more during 2025, following its recovery in 2024, ending the year just short of 6.6 million tonnes, a fall of 1.6%. Surprisingly, there was good growth in demand for non-corrugated packaging, with both segments, solid boards and wrappings, seeing an increase in consumption of 50-60,000 tonnes. The Corrugated Case Materials sector itself posted a slight decline of 0.2% to 2.43 million tonnes, which, in the circumstances, was quite creditable. Unfortunately, this resilience was import-led with an increase of 30,000 tonnes of imports balancing a net decline in sales of the same amount by UK manufacturers of these materials. Otherwise, in the Tissue sector, demand for reels remained about 1.1 million tonnes whereas the beleaguered Printings & Writings sector witnessed another substantial decline, consumption falling by over 10% to 1.23 million tonnes.

For the last two or three years, the UK's demand for primary papers and boards has hovered around levels last seen in the 1960s and 1970s. Secondary materials such as the net inflow of converted papers and boards and paper-based transit packaging have remained steady over a longer period, adding on average a further 2.6 million tonnes of materials to the UK's demand. 9.3 million tonnes of papers and boards were placed on the UK market including this volume therefore during 2025, a decline of 2.5% from the 9.5 million tonnes of 2024.

Production and Deliveries of Paper and Board

Paper and board production in the UK fell to a 70-year low of 3.18 million tonnes, a decline of 3.4% over 2024. Falling below the slump to 3.20 million tonnes in 1982, the last time the industry produced less was in 1954 with 3.01 million tonnes. All major sectors experienced reduced output, cumulatively aggregating to over 100,000 tonnes. Of the UK's two leading sectors, Corrugated Case Materials fell by 3.1% to 1.39 million tonnes; and the Tissue sector saw output of reels fall by 1.7% to just over 700,000 tonnes. As noted, a slight increase in output was apparent towards the end of the year and 2025 will hopefully become the low point for the Papermaking sector as several new machines have either just come into production at the time of writing or are likely to do so later this year.

Both domestic and export deliveries by UK paper mills fell to historic lows, as well. Domestic sales totalled 2.46 million tonnes, a decline of 3.1% on 2024, and export sales reached 724,000 tonnes, a decline of 1.6%. However, with imports also falling to a recent low, the UK's domestic share of demand remained stable at around 37%. Home sales fell across all sectors, with Corrugated Case Materials seeing the biggest fall of about 40,000 tonnes (-3.1%) to 1.25 million tonnes. Exports of Case Materials also fell, by 10,000 tonnes (-7.4%), with other sectors' export sales remaining balanced in total.

Papermaking Raw Materials

Collection of recovered paper in the UK improved in the wake of strong export consumption as domestic utilisation fell due to lack of demand by domestic producers. The volumes used by UK paper and board mills fell by 5% to just under 2.5 million tonnes, the lowest total in almost 40 years. Usage of Corrugated grades fell by 50,000 tonnes and that of Mixed Papers more modestly by 10,000 tonnes. Usage of woodfree grades, however, fell by nearly a fifth to 304,000 tonnes, though this was due in part to the closure of capacity using these grades for refurbishment. Export deliveries therefore surged, rising to 3.99 million tonnes, an increase of over 5% year-on-year. Demand from India was very strong during 2025, increasing by over 50% to 1.38 million tonnes which offset the smaller volumes exported to other parts of Asia and the EU. Overall, the UK's share of its own collections dropped to 38%.

With recovered paper collections totalling 6.39 million tonnes compared to the material placed on the UK market of 9.25 million tonnes, the UK's recycling rate increased to 69% from 66% in 2024.

Consumption of woodpulps remained stable throughout 2025, ending the year at 883,000 tonnes, a 1.6% increase on 2024. Stocks were higher throughout the year with pulp prices remaining relatively stable; the benchmark NBSK grade is reported to have had an average price of $1,500/tonne for the last six months of 2025, with little movement up or down.

Production of Corrugated Board

Corrugated board production by CPI members increased by 0.3% to 4.23 million ksm, an impressive performance in difficult economic circumstances, and with one day less for production as 2024 was a leap year. Effective weekly production increased by 0.7% to 86,460 ksm with an average board weight of 447 ksm. The Sheet-feeding sector fared even better, increasing output by 2.4% to 1.18 million ksm, higher even than 2022 when the whole sector enjoyed an end-of-pandemic boom. Sheet-feeders saw effective weekly production rise to 23,650 ksm (+2.8%) with an average board weight of 462 gsm. As a whole CPI estimated the UK corrugated box market to be approx. 4.8 million ksm in 2024, with a per capita consumption of 70 m^2.

Key Statistics 2025

Key figures of the UK's Paper-based Industries

50,000

JOBS: people employed in the UK manufacturing paper and paper products

1,443

COMPANIES: UK enterprises engaged in the manufacture of paper products

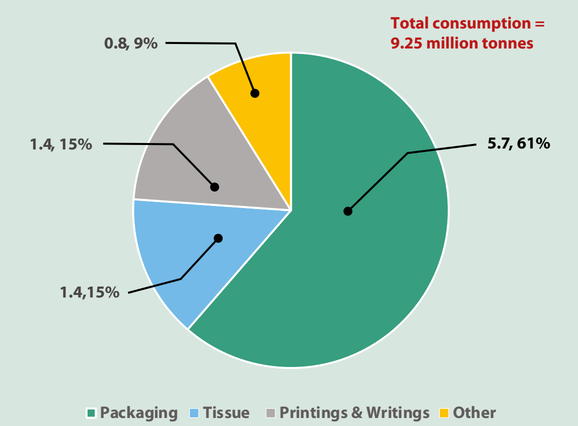
£15bn

TURNOVER: UK companies manufacturing paper have a turnover of £14,551 million

£4bn

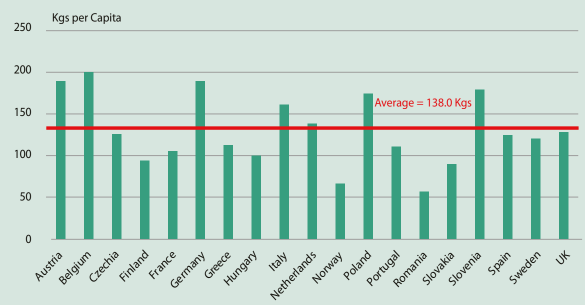
GVA: UK manufacture of paper has a Gross Value Added of £4,384 million

UK CONSUMPTION OF PAPERS AND BOARDS 2025



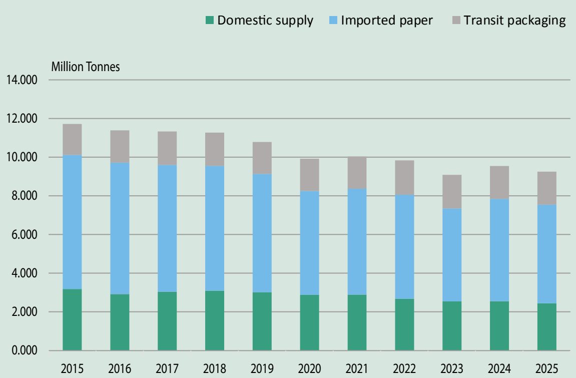
Sources: CPI, HM Revenue & Customs, NPWD

EUROPEAN PER CAPITA CONSUMPTION OF PAPER AND BOARD 2024



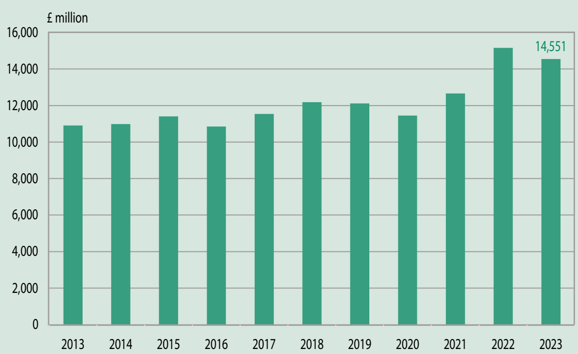
Sources: CPI; CEPI

UK CONSUMPTION OF PAPER AND BOARD BY ORIGIN



Sources: CPI, HM Revenue & Customs, NPWD

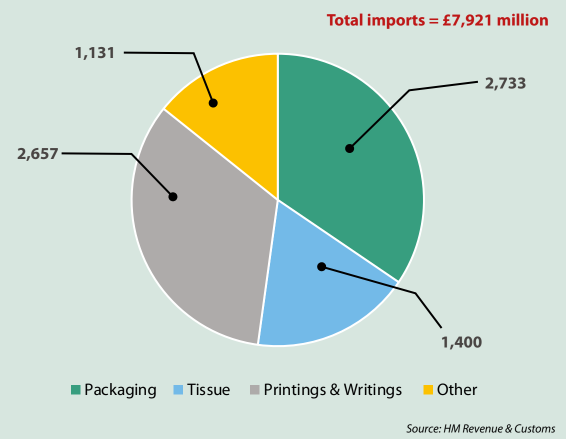
PAPER SECTOR TURNOVER



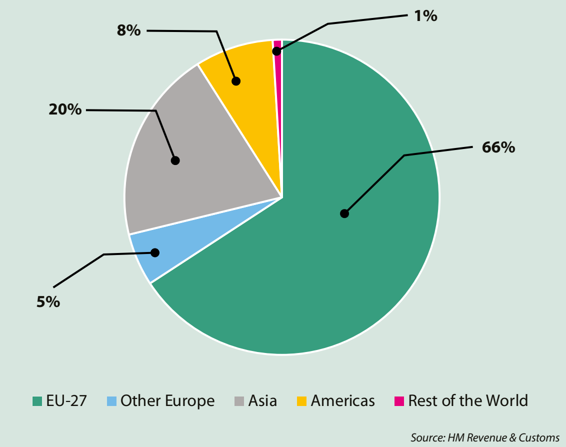
Source: ONS, Annual Business Survey 2025, SIC 17

KEY STATS 2025

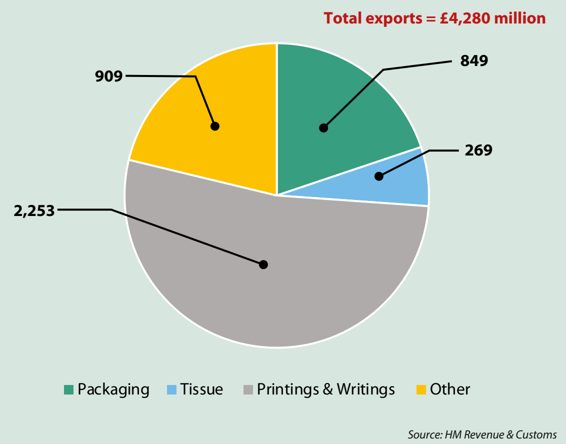
PAPER AND BOARD IMPORTS BY VALUE 2025



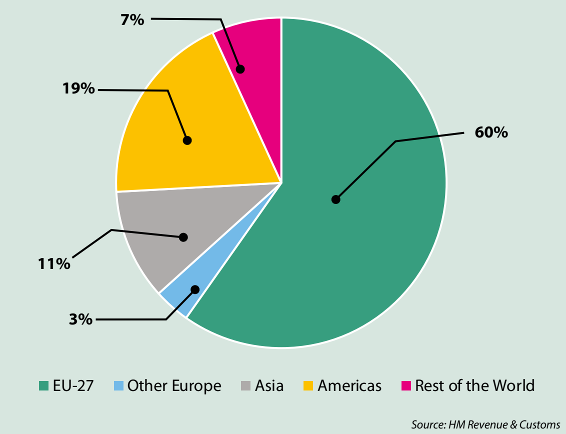
PAPERS AND BOARD IMPORTS BY ORIGIN 2025



PAPER AND BOARD EXPORTS BY VALUE 2025

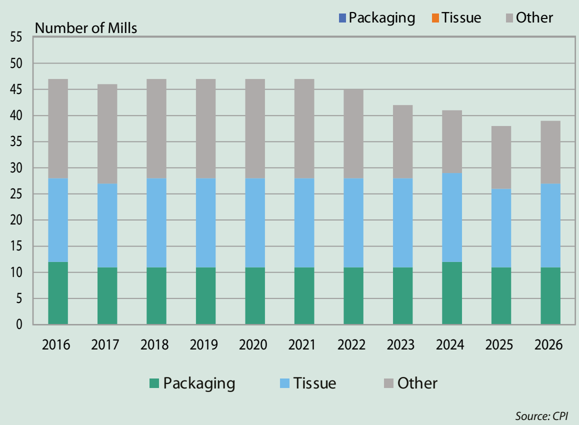


PAPERS AND BOARD EXPORTS BY DESTINATION 2025



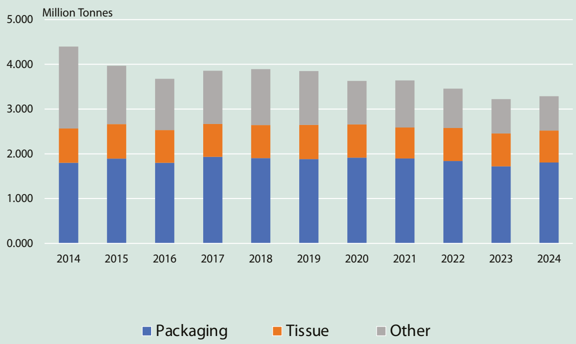
INTEGRATED PAPER, PACKAGING AND TISSUE IN THE UK 2025

PAPER AND BOARD MILLS OPERATING IN THE UK



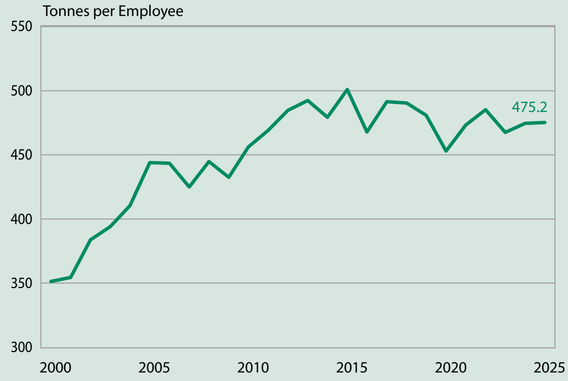
KEY STATS 2025

UK PRODUCTION OF PAPERS AND BOARDS



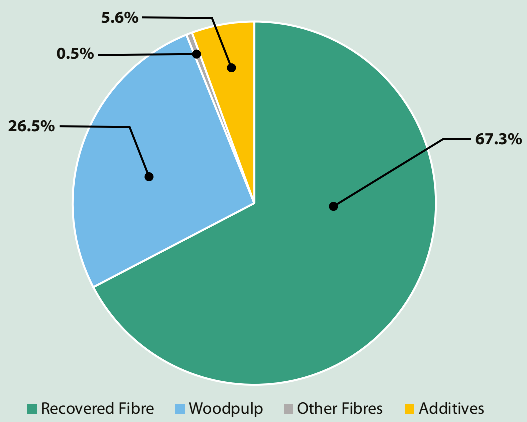
Source: CPI

PAPERMAKING PRODUCTIVITY



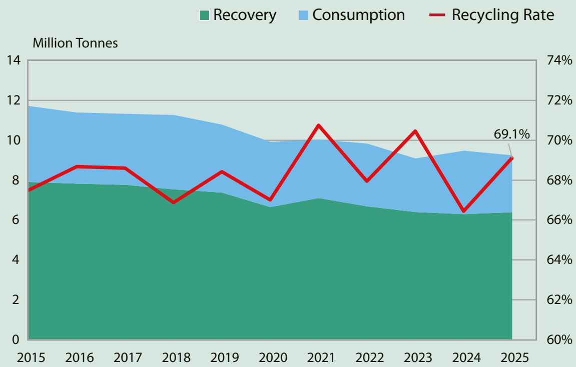
Source: CPI

PAPERMAKING RAW MATERIALS 2025



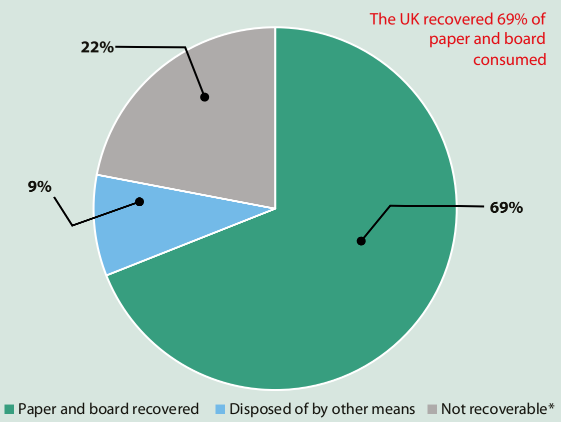
Source: CPI

CONSUMPTION AND RECOVERY OF PAPER AND BOARD



Sources: CPI, HM Revenue & Customs, NPWD

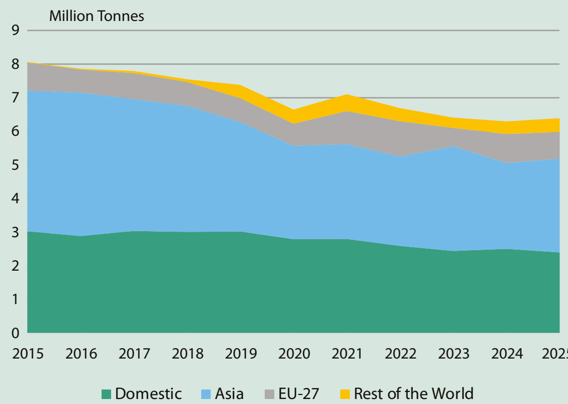
UK RECOVERY OF PAPER AND BOARD 2025



* e.g. tissue papers, papers and boards in long-term use, etc.

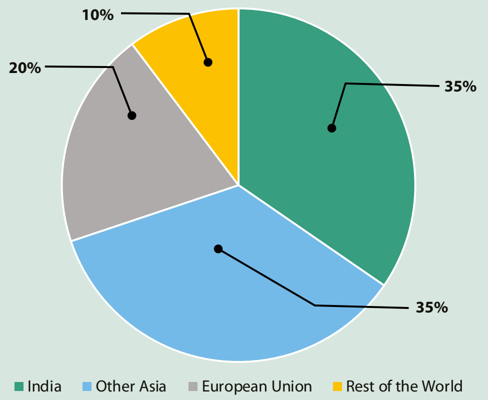
Sources: CPI, CEPI, HM Revenue & Customs

HOW UK PAPER AND BOARD IS RECYCLED



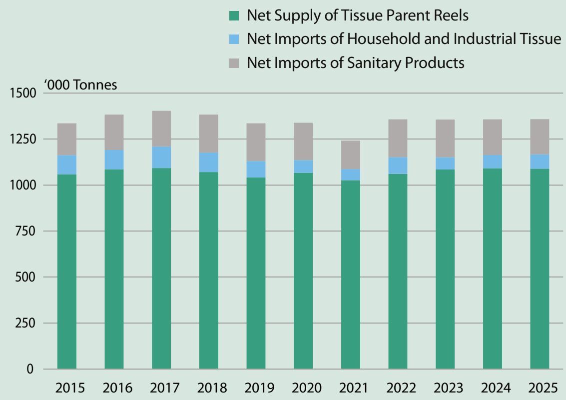
Sources: CPI, HM Revenue & Customs

RECOVERED PAPER EXPORTS BY DESTINATION 2025



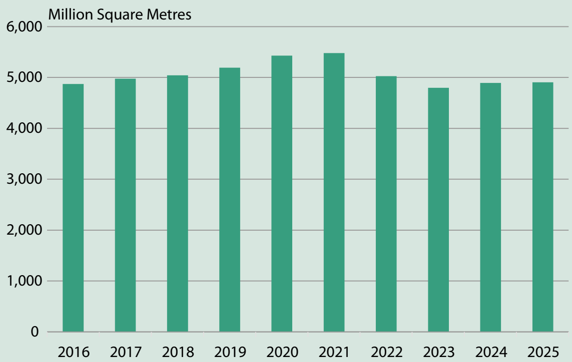
Source: HM Revenue & Customs

UK CONSUMPTION OF TISSUE



Source: CPI, HM Revenue and Customs

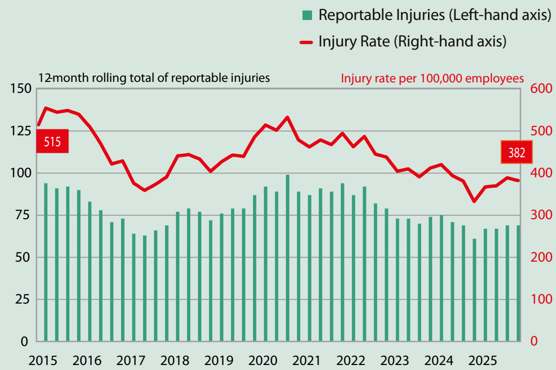
UK CONSUMPTION OF NEW CORRUGATED BOXES*



* i.e. unused boxes supplied to customers for packing/filling

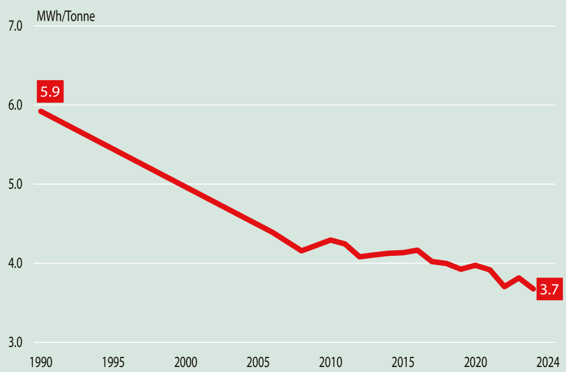
Sources: CPI, HM Revenue & Customs

SAFETY IN THE PAPER-BASED INDUSTRIES



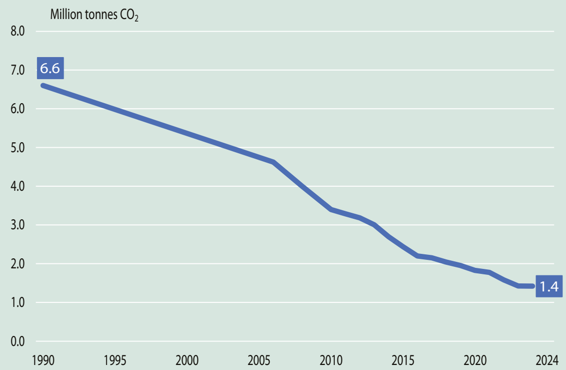
Source: CPI

SPECIFIC ENERGY CONSUMPTION FOR PAPERMAKING



Source: CPI

FOSSIL FUEL CARBON DIOXIDE EMISSIONS FOR PAPERMAKING



Source: CPI

KEY STATS 2025

CPI Team

Andy Barnetson
Executive Director – Competitiveness

Andrew Braund
Director of Health and Safety

Neil Fishburne
Chief Operating Officer (COO)

Steve Freeman
Executive Director – Energy & Climate Change

Elisse Hare
Communications & Marketing Officer

Ken Holroyd
Energy Data Manager

Nick Langdon
Statistics Manager

Keval Nathwani
Public Affairs Manager

Emma Punchard
Director of Communications

Dimitra Rappou
Executive Director – Sustainable Products

Lyra Sanchez
Packaging Sustainability Manager

Jo Scott
Director of Sustainability

Alex Veitch
Chief Executive Officer (CEO)

Leonie Williams
Accounts and Office Manager

CPI Council/Members 2026

Officers

Kevin Bussey	President (until May 26)	Smurfit Westrock UK Ltd
David Richardson	President (as of May 26)	Logson Group
Lucy Russell	Vice President (as of May 26)	Smurfit Westrock - Central Resources
Ulf Löfgren	Senior Vice President	Holmen Board and Paper Ltd
Paul Barber	Vice President (until May 26)	James Cropper PLC
Alex Veitch	CEO	Confederation of Paper Industries
Neil Fishburne	COO	Confederation of Paper Industries

Council Members

Paul Barber	James Cropper plc
Lee Doherty	Essity UK Ltd
Eddie Fellows	Smurfit Westrock - Central Resources
Jordi Goma-Camps Trave	WEPA UK
David Harries	Northwood Group
Dan Howell	Kimberly-Clark Group
Martial Jeannot	DS Smith PLC
Darren Johnson	Saica Group
Jonathan Kralev	Saica Group
James Lomax	DS Smith PLC
Bryan McMurdo	UPM-Kymmene (UK) Ltd
Simon Morris	Palm Group
Steve Moss	Cepac Ltd
Giuseppe Munari	Sofidel UK Ltd

Full Members

Ahlstrom Chirnside Ltd
Aylesbury Box Co
Caledonian Packaging Ltd
Cepac Group
De Jong Packaging Ltd
Devon Valley Ltd
DS Smith Packaging Ltd
DS Smith Paper Ltd
Essity UK Limited
FASPAK (Containers) Ltd
Fencor Packaging group Ltd
Fourstones Paper Mill
Glatfelter UK Ltd
Gordano Support Group
Higher Kings Paper Mill
Hollingsworth & Vose Co Ltd
Holmen Board and Paper Ltd
Industrie Cartarie Tronchetti UK Ltd
James Cropper PLC
John Roberts Holdings Ltd
Kimberly-Clark Ltd
Logson Group
McLaren Packaging Ltd
Metsa Tissue Ltd
Northwood Tissue (Lancaster) Ltd
Packaging Products Ltd
Palm Paper Ltd
Pelta Medical Papers Ltd
Portals Paper Ltd
Recycling UK Ltd
Romiley Board Mills
Roydon Packaging Ltd
S.Sheard & Son Ltd
Saica Pack UK Ltd
SAICA Paper UK Ltd
Shotton Mill Ltd
Smurfit Kappa Paper UK Ltd
Smurfit Kappa Recycling UK
Smurfit Westrock UK Ltd
Sofidel UK Ltd
Sonoco Board Mills Ltd
Southern Cross Packaging Ltd
Swanline Print Ltd
Tri-Wall UK
UPM-Kymmene (UK) Ltd
Vernacare International Ltd
VPK Packaging Ltd
W E Roberts Ltd
Weedon Group Ltd
Weidmann Whiteley Ltd
WEPA UK Ltd
Zeus Packaging Ltd

Associate Members

AIT3CH Ltd
Avanti Conveyors Ltd
BIM UK Limited
Emap Publishing Ltd
Envirosystems (UK) Ltd
Euchner (UK) Ltd
Genus Trading Ltd
Jointine Products (Lincoln)Ltd
OMYA UK Paper & Board
ReCarton UK
Sun Automation Group
The Environment Exchange

Affiliate Members

Paper and Board Association
Sheet Plant Association

cpi confederation of paper industries

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