

THE POLISH PULP AND PAPER INDUSTRY

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POLISH PULP AND PAPER MAKERS GAIN FROM OUTSIDE INVESTMENTS AND INTERNAL EFFORTS

DURING THE 1990s, POLAND AND ITS various industries — including pulp and paper — have been going through a transition. Companies that had been state-owned are being marketed to western investors for privatization. Now, instead of simply meeting quotas, companies must be concerned with production quality and marketing their goods.

For the Polish pulp and paper industry, that production included an estimated 707,000 metric tons of chemical pulp in 1997 and 1.45 million metric tons of paper.

Although 2500 firms in Poland manufacture paper of some type, only 280 of those employ more than 250 people, according to The Central and Eastern Europe Business Information Center (CEE-BIC).

Pulp is produced at three integrated mills in Poland, located at Swiecie, Kwidzyn and Ostroleka (reports on the first two appear in this issue). Majority shares in each have been sold to international companies. The Fra-Mondi group owns the Swiecie mill, International Paper operates the Kwidzyn complex, and Intercellulosa AB has majority interest in Ostroleka. All three have benefited from significant investments by their outside owners to modernize the mills.

Paper consumption in Poland exceeded 2 million tons in 1997, according to the CEEBIC. That was about 52.5 kg/person. Consumption of

paper packaging was about 10 kg per capita, about a quarter of the consumption in Germany. Overall paper consumption in Poland is forecast to increase by as much as 12% annually through 2010. Imports of paper for 1997 rose 34.4% over 1996 and exports were up 18.9%.

The interests of the mills are represented by the Association of Polish Papermakers (Stowarzyszenie Papierników Polskich), with offices in Łódź, the second largest city in Poland. Its membership includes some 300 full members and about 40 supporting members. Andrzej Jagiello became president of SPP in 1998. Wiktorian Z. Tarnawski serves as chairman of the association and Zbigniew Fornalski is executive director.

The Association was formed in 1946. Up until 1992, it was known as The Technical Association of the Polish Pulp and Paper Industry (Stowarzyszenie Inżynierów i Techników Przemysłu Papierniczego). Before 1992, the association was somewhat "static." It was entirely run by volunteers, with one full-time employee. As SPP, it is now run by a full-time staff and it has become a more active part of the Polish paper industry.

The Association has been participating in the restructuring of the Polish paper industry. It promotes the interests of the industry to investors, to foreign organizations and to government bodies within Poland.

Every three years the Association organizes a Congress of Polish Papermakers. The theme for the most recent Congress, held in mid-June 1998, was the prospect of the Polish paper industry joining the European Union. That fall, SPP sponsored a papermaking conference and exhibition and a symposium on paper quality.



A view of Warsaw — Poland's capital city



The staff of the Polish Paper Review

In recent years, the Association has become more active internationally, cooperating in various ways with TAPPI, EuCePa, PITA, CPPA and other industry groups. In October 1997, for example, SPP and TAPPI cosponsored the East European Paper Recycling Symposium in Warsaw. It drew speakers from throughout Europe and from the United States. The association has also been involved with the Food and Agriculture Organization of the United Nations and represents the Polish corrugated board manufacturers in FEFECO.

Within Poland, the Association cooperates closely with the ministries of the environment, natural resources and forestry.

Lodz is also home to the Institute of Papermaking and Paper Machines at the Technical University of Łódź. Paweł Wandelt serves as professor there. He is also editor in chief for the Polish Paper Review (*Przegląd Papierniczy*)

The Institute was formed in 1970 through the

merger of the Technical University's Papermaking and Paper Machines Department (established in 1949) and the Department of Pulp and Paper Technology (founded in 1952). The Institute educates engineers specializing in papermaking and conducts research in papermaking and related fields.

The papermaking program has about 150 students. Most follow a two-year course of study, some go a third year for a master's degree. Areas of study include chemistry, mechanics, mechanical engineering, process engineering and environmental protection. Some of the students go on to get jobs with mills, others prefer to stay in Lodz or in Poland's larger cities.

During the late 1990s, as Poland has been making the transition to a market economy, one of the challenges facing the Institute was to keep from losing the offices and space in the 8-story building it had been using. It has been renting out some of the unused space. In the eyes of the faculty, the site is ideal for a centralized pilot plant that could serve the widely separated mills of Poland.

Funding has been a bit tight over the last few years, but the professors have managed to keep enough equipment on hand to do a variety of research. The school has been able to acquire a bioreactor for bleaching studies through the Foundation of Polish Science, for example. It has a Kajaani FS 200, a Mutek PCD02, an Instron 4464, a Metler DL 21 titrator, a Pulmac TS-100, plus equipment



SPP's Wiktorian Tarnawski and Zbigniew Fornalski



Paweł Wandelt (left) demonstrates some of the newest equipment at the Institute of papermaking and Paper Machines. Students also use more traditional equipment (above).

for steam explosion pulping, a spectrometer, and more.

Some of the research projects conducted at the institute in the last five years have included the following:

- Shrinking forces in drying of papers and boards
- Energy-saving technologies in papermaking
- Application of biocatalysts in pulping and bleaching processes
- Ecological impacts of wastepaper recycling in the Polish paper industry
- The process of ink transfer — from printers forms to base. **TJ**

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Internet resources

For additional information, see the SPP website at <http://www.pdi.nl/~spp>. The Institute of Papermaking and Paper Machines and the Technical University of Łódź have a website at <http://wipos.p.lodz.pl/paper>. For a report on the Polish pulp and paper industry from the Polish Agency for Foreign Investment (PAIZ), see <http://www.paiz.gov.pl/paper.btm>. For an industry sector analysis of the packaging sector in Poland, see <http://iepnt1.itaiep.doc.gov/eebic/countryr/poland/market/pack.btm>



A memorial

Treblinka lies about 100 km northeast of Warsaw. It is remembered by Poles and Jews because of the two “death camps” operated nearby by the Nazis during World War II — two of many where millions lost their lives. Today, a stone monument, inscribed with the promise “Never again,” marks the site of Treblinka II, the Jewish camp. It is surrounded by 17,000 pieces of rock — the daily deathcount for the camp at its peak. South of the monument, down the cobblestones of the “black road” are the remains of the original camp where about half the Polish prisoners who had been confined there died. At the end of the road, a small Christian cemetery honors the dead.