

# Imerys Pigments for Paper to become Imerys Paper and Packaging

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# Intro

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*VP & General Manager*

**As the global paper industry emerges from the recession of 2008 & 2009 a few things are becoming clear. The trend for the industry to move eastwards continues with the Chinese, Indonesian and Indian markets driving strong growth in production. In the mature economies of Western Europe, North America and Japan, however, while there has been some recovery from the depths experienced in 2009 the paper industries will struggle to regain the peak production levels seen in 2006/7.**

While these trends in the paper markets present challenges to our business in how best to position ourselves to deal with them there is another important market sector that is behaving quite differently and is producing a range of growth opportunities for us across all regions.

The global production of fibre based board and packaging is a robust and growing market area for Imerys. As in the printing and writing sector the expanding economies in Asia are driving significant growth in demand and production of packaging materials. In the mature economies, however, unlike in the printing and writing segments, demand and production of board and packaging remains strong and continues to grow.

The packaging markets with their solid market growth and good profitability levels are highly attractive and have always been of importance to Imerys with around 10% of our global turnover currently derived from them. And whilst the paper industry remains vital to our future success there is increasingly a very good fit between the needs of the global board and packaging

markets and the Imerys pigment portfolio which provides us with the ability to differentiate through marketing and innovation.

As examples. The hyper platy clay platform from North America provides products such as the E-type and Barrisurf ranges that provide coverage and important barrier properties in packaging. Combinations of Brazilian clay and carbonates provide very cost effective solutions to coated board producers. Calcined clays can also give benefits in improving the optical coverage and opacity needed in certain board grades.

The Imerys multi-pigment approach means we are uniquely positioned to take advantage of the growth opportunities offered by the global board and packaging markets and as we look to the future it is



clear that there is a significant opportunity to develop our business further. In order to take advantage of this, however, we need to focus our technology and resources properly and to recognise the importance of this challenge we have recently created a new role of Board and Packaging business manager in order to develop and drive the implementation of a global strategy and expand our market presence in those segments.

In addition to this we have decided to reflect the increasing importance of these markets to our business by renaming our division Imerys Paper and Packaging.

We believe strongly that there are great opportunities for our business in these markets and that by focusing our worldwide resources and skills we will be successful.

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