



**workshop on
the sustainability
of the brazilian
pulp & paper
industry**

são paulo, october 27 - november 1st, 1997

schedule and information

ORGANIZED BY
BRAZILIAN FOREIGN RELATIONS MINISTRY
BRAZILIAN MISSION TO THE EUROPEAN COMMUNITIES
BRAZILIAN PULP AND PAPER ASSOCIATION - BRACELPA (that succeeds ANFPC and ABCECEL)

schedule

Day	Time	Activity
27 Monday	07:45 am	Leave hotel by van to Congonhas Airport
	08:30 am	Depart airport in private plane to Vitória
	09:30 am	Arrival in Vitória. The visitors will be welcomed by Ms. Denize Sa, Aracruz Public Affairs
	09:45 am	Departure to Coqueiral Praia Park Hotel, by company's via seaside road
	11:00 am	Arrival at the hotel
	11:30 am	Departure to the Guest House
	12:00 pm	Lunch
	01:45 pm	Departure to the mill
	02:00 pm	Arrival - Incel Auditorium. The visitors will be welcomed by Mr. Carlos Alberto Roxo, Manager, Environment & Corporate Quality
		Overview of company's activities - forestry; industrial; environmental
	03:15 pm	Visit to the industrial facilities - wood yard; recovery boiler; drying/bailing areas
	04:30 pm	Departure to the hotel, passing by the port
	05:00 pm	Arrival
08:00 pm	Dinner at the Guest House with Aracruz Managers	
28 Tuesday	07:30 am	Breakfast
	08:30 am	Departure to the Watershed Project, accompanied by Mr. Luciano Lisboa Jr., Tree Farm & Environmental Licence Manager
	09:00 am	Arrival and visit
	10:30 am	Departure to the logging area
	11:00 am	Arrival and visit to the harvesting and transport operations
	12:00 pm	Departure to the mill
	12:30 pm	Lunch at the Industrial Restaurant
	01:30 pm	Departure to the nursery
	01:45 pm	Arrival and to the eucalyptus and native seedlings production
		Planting of a native tree

schedule

02:30 pm	Departure to Vitória, passing by Coqueiral Residential Village
04:00 pm	Arrival at the airport
04:30 pm	Leave for São Paulo - private plane
05:45 pm	Arrival in São Paulo - Congonhas Airport
06:15 pm	Departure to Century Paulista Flat Hotel by car

29 Wednesday

08:00 am	Departure from hotel by van
10:00 am	Arrive at Ripasa I plant (Americana - SP)
10:10 am	Welcome reception Mr. Silvio Rachid - Industrial Director Mr. Marco Stella - Production Superintendent
	Coffee Service
	Introduction of the Company - Mr. Marco Stella Video and Production Flow Chart
11:00 am	Visit - external part of the mill Woodyard Aeration Pond Environment control Laboratory Environment control System Pulp Plant Paper Machines I and II Finishing Operations
01:00 pm	Lunch
03:00 pm	Departure to São Paulo
05:00 pm	Arrive at hotel

30 Thursday

	Workshop on the Sustainability of the Brazilian Pulp & Paper Industry (at the hotel)
08:30 am	Breakfast with Bracelpa Directors
09:30 am	Opening Osmar Elias Zogbi - Bracelpa President
09:45 am	Seminar: National Environmental Policy His Excellency Gustavo Krause Environment Minister

10:00 am	Seminar: Commerce and Environmental - A Brazilian Vision His Excellency Jório Dauster Ambassador, Head of the Brazilian Mission to the European Communities, representing the Brazilian Foreign Minister
10:20 am	Seminar: Brazilian Environmental Management Laws and Rules (Procedures) Eduardo Martins President of the Brazilian Institute of the Environment
10:40 am	Seminar: Commerce and Environment - A Community Vision Pierre Defraigne Head of the UE Delegation
11:00 pm	Discussion
12:30 pm	Lunch
02:30 pm	Seminar: Characterization of the Pulp and Paper Sector Bracelpa Representative
03:00 pm	Round Table: Native and Planted Forests - Cultivation and Management Situation and Tendencies Moderator: Mr. José Luiz Stappe (Luiz de Queiróz Agricultural School) Speakers: Brazil - Mr. Celso E.B. Foelkel (Riocell) UE - Mr. Andy Roby (DGI - UE)
03:45 pm	Discussion
04:15 pm	Seminar: Environmental Control and Energetic Inputs in the Industry: The Brazilian Experience Moderator: Mr. Jorge Luiz Colodette (Viçosa Federal University) Speaker: Mr. Armando Luiz de Souza Mesquita (Suzano)
05:00 pm	Presentation: Community Eco Label - Systems Review Speaker: Claude Rouam (DGXI)
05:45 pm	Discussion
06:30 pm	Closing Cocktail and informal dinner

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Friday

05:30 am	Leave hotel to Congonhas Airport
05:45 am	Arrival at Congonhas Airport
06:00 am	Breakfast at TAM VIP lounge
06:52 am	Depart in flight KK 550 to Porto Alegre

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08:42 am	Arrival at Salgado Filho Airport, Porto Alegre - RS Reception and bus departure to Horto Florestal Barba Negra Barra do Ribeiro
10:15 am	Arrival at the Farm instalations Presentation of the place, emphasizing the cultural peculiarities Coffee break
10:45 am	Camp visits Nurseries Seedling production
01:00 pm	Lunch Barbecue service, followed by Southern Region cuisine specialties and fresh fruit
02:30 pm	Departure to Riocell - Guaíba Enter the city crossing the downtown area and driving on the Guaíba river bank
03:30 pm	Arrival at Riocell Access to the Main Gate - visit the industrial area, starting at the Madeira entrance, following the pulp production flow up to the Port, passing by the Natural Park, Treatment Station of Effluents and Power Boiler, going to the Technological Centre
04:30 pm	Auditorium Coffee service Video Presentation: "The Magic of Paper" Program closing
05:30 pm	Departure to the Salgado Filho Airport
07:12 pm	Departure to São Paulo (flight KK 567)
09:02 pm	Arrival at Congonhas Airport - Transportation by van to the hotel
09:30 pm	Arrival at Century Paulista Flat Hotel

01 Saturday

	Closing of the Workshop on the Sustainability of the Brazilian Pulp & Paper Industry (at the hotel)
08:00 am	Breakfast with Bracelpa Directors
09:00 am	Conclusions
12:00 pm	Closing of the Workshop
12:30 pm	Lunch at the restaurant "Dinho's Place" (feijoada, a typical Brazilian dish)

Special arrangements for guests' departure.

Territorial Extension and population

	Km ²	%	1000	
			Population	%
BRAZIL	8,547,404	100.0	157,956	100.0
<i>Regions</i>				
North	3,869,649	45.3	7,529	4.8
Northeast	1,561,178	18.3	46,768	29.6
Southeast	927,286	10.8	68,924	43.6
South	577,214	6.8	24,036	15.2
Middle West	1,612,077	18.9	10,699	6.8

Annual population growth rate: 1.4%

Gross Domestic Product - GDP (at current prices)

	GDP		
	US\$	Real Change	US\$
	Million	Rate (%)	Per Capita
1994	561,305	6.0	3,651
1995	718,495	4.3	4,611
1996	749,142	2.9	4,743

Gross Fixed Capital Formation (GFCF)

	At 1980 Prices	Share in GFCF		
		Building	Machinery and Equipment	Other
1994	15.3	67.3	31.0	1.7
1995	16.6	66.3	32.3	1.4
1996 (e)	16.4	65.5	31.9	1.4

Prices Indexes

	General Prices (Domestic Supply)
1994	909.6
1995	14.8
1996	9.3

brazil socio-economic profile

Balance of Payments

	<u>US\$ Million</u>	<u>% GDP</u>
1994	7,215	1.3
1995	12,919	1.0
1996	8,665	1.2

Trade Balance

	<u>US\$ Million</u>		<u>Balance</u>
	<u>Exports</u>	<u>Imports</u>	
1994	43,545	33,079	10,466
1995	46,506	49,858	-3,352
1996	47,747	53,286	-5,539

1996

- Number of Pulp and Paper Companies: 220, operating 255 industrial units, located in 16 Brazilian States.
- Total Sales: US\$ 7.5 billion
- GDP Share: 1.0%
- Total Taxes Paid: US\$ 1.0 billion
- Direct Jobs: 103,000
- Plantation Area: 1.4 million hectares
Eucalyptus: 62%
Pinus: 36%
- Production (MT):
Pulp: 6.2 million
Paper: 6.2 million
- Exports (USD): 1.9 billion
Pulp: 1.0 billion
Paper: 0.9 billion
- Position in World Ranking:
Pulp: 7th.
Paper: 12th.

The development of fast growth forests has been in Brazil one of the most important rural activities and its economic, social and environmental results have been highly rewarding.

Thanks to research and the exceptional soil and climactic conditions, propitious to the cultivation and harvesting of high yield planted forests, the forestry companies of the sector securely and successfully supply the industry with raw material produced from planted areas.

The industry, which sees this as a characteristically agricultural activity designed for pulp and paper production, has been planting and restoring around 100,000 hectares per year of forest areas, reaching by the end of 1996 a total planted area of 1.4 million hectares, especially of pinus and eucalyptus. In addition to this planted area, the sector maintains approximately 1.5 million hectares of preserved native forests.

The planted area is responsible for the production of part of the required wood to supply the industries, which last year consumed 45.5 million st/wb. Self supply averages around 80% and the balance comes from planted forests that belong to rural producers.

The forestry activity of the paper sector, which maintains close relationship with the world's most highly respected universities and forestry research centers, presents sustainable forest practices and works intensively towards the certification both of its activities and forest products.

Brazilian industries, which have for a long time expressed total support to ISO processes, are currently implementing the processes of forestry certification within international principles and criteria, as a way to demonstrate and enforce their environmental concerns.

The yield levels reached by Brazilian planted forests generally surprise the international forestry community. These results arise from a continuing professional policy of adoption of scientifically tested and approved forestation practices.

The activity of the forestry segment of the pulp sector has overcome constant challenges to integrate social, economic and environmental interests, supported by the direct involvement of 35,000 professionals of various levels.

Environment pollution control in Brazil is regulated at Federal, State and Municipal levels. Historically, the first government agency for water and air pollution control was created in 1964 with legal jurisdiction over 4 municipalities in the ABCM area, a highly industrialized and polluted region at the time, which is now included into the São Paulo Metropolitan Area.

At the beginning of the seventies the first environmental state agencies were created in São Paulo, Rio de Janeiro and Bahia. The first Federal institution, the Special Secretariat of Environment, was created in 1973.

Currently environmental issues are supervised by the Ministry of Environment, Hydric Resources and Legal Amazon, which has as its operational agency the Brazilian Institute of Environment (IBAMA), which is also responsible for forestry and fishing.

The National Environmental Policy was established in 1981, creating new tools of action, such as the Environmental Impact Study (EIA) and its Synthesis Report (RIMA), from the institutional point of view, the law also created the National Environmental Council (CONAMA), a collegiate agency with representatives from government, private sector and NGO'S, as its maximum authority.

The EIA/RIMA was regulated in 1986, and since then new pulp industries or expansions of existing pulp plants must submit an environmental impact study and have its synthesis report presented and accepted in Public Hearings as a previous obligation before applying for the necessary permits (previous, installation and operation). The Operation Permit is renewed periodically.

Although most Federal and State legislations are not oriented by industry type, in terms of discharge and emission standards, the Installation Permit includes specific technical control demands for the polluting sources of that particular industry. The owner must be ready to comply with such demands, when applying for the Operation Permit.

As a potential pollution source, even when well controlled, the pulp industry is always under surveillance to verify its compliance with discharges and emissions standards.

The exporting segment of the Brazilian pulp and paper industry, as a supplier of high quality pulp and paper to the most demanding and competitive world markets, has an extra incentive to continuously update and improve its process technology and environmental performance levels, as required by those markets.

Market Pulp

Aracruz Celulose S.A.
Rua Lauro Müller, 116 - 12º andar
22299-900 Rio de Janeiro, RJ
☎ (55 21) 545-8111

Bahia Sul Celulose S.A.
Rua Dr. Fernandes Coelho, 85 - 9º - 11º andares
05423-040 São Paulo, SP
☎ (55 11) 816-9600

Cenibra - Celulose Nipo Brasileira S.A.
Rua Guajajaras, 40 - 18º andar
30180-910 Belo Horizonte, MG
☎ (55 31) 238-6100

Riocell S.A.
Rua São Geraldo, 1680
92500-000 Guaíba, RS
☎ (55 51) 480-2233

Paper

Celucat S.A.
Rdv BR 116, km 218
88535-000 Correia Pinto, SC
☎ (55 49) 243-1222

Champion Papel e Celulose Ltda.
Rdv SP-340, km 171
13840-970 Mogi Guaçu, SP
☎ (55 19) 861-8121

Cia. Suzano de Papel e Celulose
Av. Brig. Faria Lima, 1355 - 10º - 12º andares
01452-919 São Paulo, SP
☎ (55 11) 817-0122 / 817-0381

Igaras Papéis e Embalagens S.A.
Rua do Rocio, 109
104552-000 São Paulo, SP
☎ (55 11) 3048-4800

Inpacel - Ind. de Papel Arapoti S.A.
Av. Eng. Luiz C. Berrini, 1253 - 7º andar
04571-010 São Paulo, SP
☎ (011) 5505-2933

KFPC - Divisão Paraná - Celulose e Papel
Rua Formosa, 367 - 12º andar
01049-000 São Paulo, SP
☎ (55 11) 250-4000

Ripasa S.A. Celulose e Papel
Lgo. São Bento, 64 - 4º andar
01029-900 São Paulo, SP
☎ (55 11) 225-5000

Votorantim Celulose e Papel S.A.
Alameda Santos, 1357 - 13º andar
01470-900 São Paulo, SP
☎ (55 11) 269-4000

Leading **brazilian** exporters of **pulp** and **paper** to the UE and **members** of **bracelpa**

