

Brazilian Pulp and Paper Sector



Associação Brasileira Técnica de Celulose e Papel

Brazilian Pulp and Paper Technical Association

Brazilian Economic Aspects – Data 2009

PULP

Total: 13.315.000 ton/year
4th producer

PAPER

Total: 9.428.000 ton/year
9th producer

222 companies, located in 18 States, 539 municipalities
35 are frequent exporters

+ U.S. \$ 3.7 billion - Trade Balance 2009
14.4% of Trade Balance of Brazil
\$ 12 billion in investments over the past 10 years

Source: Bracelpa



Social Issues

115,000 direct jobs:

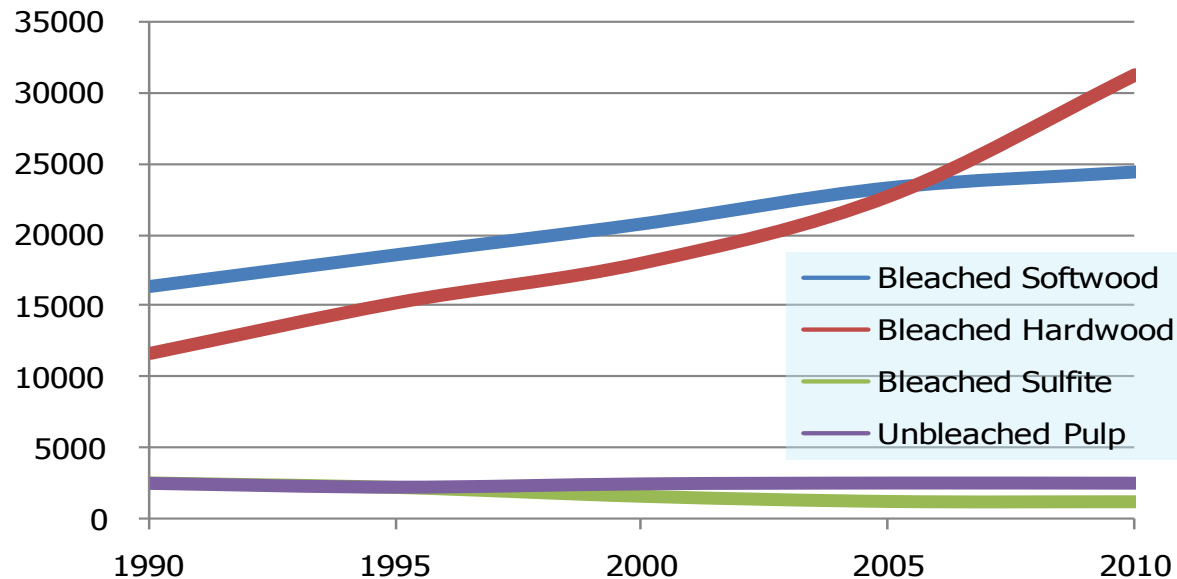
- Industries 68,000
- 47,000 Forests



Source: Bracelpa

WORLD MARKET PULP CAPACITY EVOLUTION

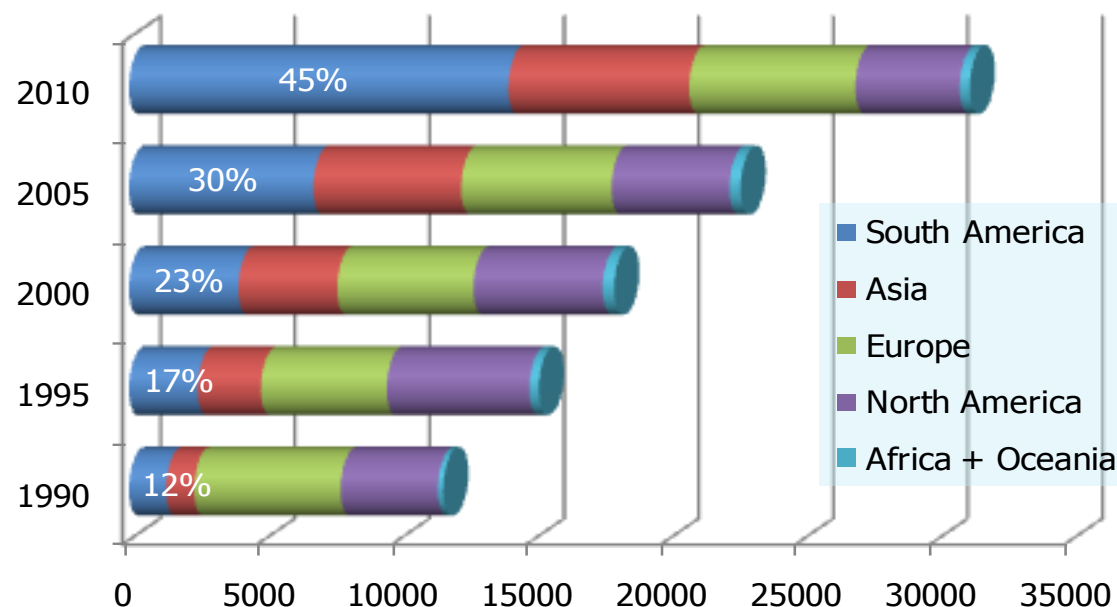
1,000s Tons	1990	1995	2000	2005	2010
Bleached Softwood	16,350	18,610	20,825	23,395	24,530
Bleached Hardwood	11,680	15,230	18,030	22,730	31,245
Bleached Sulfite	2,495	2,205	1,635	1,305	1,285
Unbleached Pulp	2,495	2,220	2,460	2,520	2,510
Total Chemical Grade	33,020	38,265	42,950	49,950	59,570



Source: PPPC

BLEACHED HARDWOOD MARKET PULP CAPACITY INCREASE

1,000 tons	1990	1995	2000	2005	2010
South America	1,380	2,555	4,070	6,850	14,100
Asia	1,050	2,350	3,670	5,495	6,720
Europe	5,435	4,675	5,060	5,590	6,170
North America	3,615	5,300	4,805	4,380	3,880
Africa + Oceania	200	350	425	415	375
Total World	11,680	15,230	18,030	22,730	31,245



Source: PPPC

MARKET PULP - EUCAPULP, THE PULP WINNER

1,000s Tons	1990	1995	2000	2005	2010
Bleached EucaPulp	3,495	5,120	7,130	10,525	18,150
Total Bleached Hardwood Pulp	11,680	15,230	18,030	22,730	31,245

Source: PPPC

**Thanks for the attention and
a lot of success
in this magnificent
Eucalyptus Pulp Colloquium**