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WINTER 2024/2025

On Track for Sustainable Packaging

PaperAde

UPDATE: Graphic Packaging's new CRB mill in Waco, Texas, progressing well

Water-based dispersion barrier coatings for paper and board packaging

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contents

WINTER 2024/2025, VOLUME 140, NUMBER 4



FEATURES

24 On Track for Sustainable Packaging

The construction of Graphic Packaging's new CRB mill in Waco, Texas, is progressing very well, and the installation of its new paper machine is underway.

28 Cultivating Positive Safety Culture in the Pulp and Paper Industry

By taking a collaborative approach to HSE, members of the pulp and paper industry can improve mill safety from the woodyard to the finishing section.

30 Water-based Dispersion Barrier Coatings for Paper and Board Packaging

Water-based dispersion barrier coatings are proving instrumental in delivering both performance and sustainability as the industry continues to develop alternatives to plastic packaging.

COLUMNS

22 Recycling Matters

New data tells a familiar story: paper recycling success is strong.

DEPARTMENTS

- 4 Editor's Note
- 6 Industry News
- 20 People
- 21 Calendar

34 Of Interest

The Poly Coated Paper Alliance recently completed a major step in their objective initiating an in-depth analysis of polycoated paper recycling at material recovery facilities, including the detection and sortation methods used.

SERVICES

- 33 Classified Ads
- 33 Index of Advertisers

editors note



Upon Further Review

By John O'Brien, Managing Editor jobrien@paperage.com

As we were prepping the Winter 2024/2025 issue of PaperAge, an eyebrow-raising news report published by Bloomberg on Dec. 19 said Suzano is interested in acquiring Clearwater Paper, according to "sources."

At first glance I thought, 'Why Clearwater?'

But, considering Suzano's activities and executive comments during 2024, coupled with a significant divestiture by Clearwater, my take on the speculative deal changed to, 'Why not Clearwater?'

Going back to May of 2024, Suzano reportedly approached International Paper about buying the U.S. papermaker. Although IP didn't comment on the speculative reports, and understandably so as it is in the process of acquiring London-based DS Smith (ongoing), Suzano did confirm it made the attempt to buy IP.

In a June 26, 2024 press release, Suzano stated, "Following up on the Material Fact disclosed on May 22nd, 2024, informs its shareholders and the market in general that, after some negotiations with the International Paper Company regarding a potential transaction between the companies, the Company has reached what it believes to be the maximum price for the transaction to generate value for Suzano, without engagement from the other party. Therefore, in observance of its commitment to capital discipline, Suzano formalizes that it will not pursue a transaction involving the acquisition of International Paper."

Suzano concluded, "It is important to emphasize that it has always been a condition of Suzano for the completion of this transaction that the engagement between the parties be based on private, confidential, and amicable terms. As it was not possible to proceed in this manner, Suzano has decided to terminate the negotiations."

Although a deal with IP didn't happen, Suzano has made crystal clear its long-term strategy to scale up in rapidly growing markets and strengthen its presence in the U.S. consumer packaging and food service market.

And the Brazilian pulp and paper producer did just that on Oct. 1, 2024 when it completed the \$110 million acquisition of Pactiv Evergreen's Pine Bluff, Arkansas, paper mill (liquid packaging board and cupstock) and Waynesville, North Carolina extrusion facility (used for the board produced at Pine Bluff).

The Pactiv Evergreen assets add about 420,000 metric tonnes per year of integrated paperboard to Suzano's production capacity.

To amplify its ambition to grow in the U.S., Suzano stated in its 3Q 2024 earnings release, "... we continue to expand the exclusive go-to-market model of the Company, advancing on expanding the client base and expanding the regions served. In this regard, note the completion of the acquisition of the Pine Bluff and Waynesville assets in the USA, marking Suzano's entry into the North American paperboard and packaging market. This is a significant milestone in our international expansion strategy and the growing focus on the packaging markets. Moreover, the Company remains focused on continuously investing in a portfolio of innovative products aimed at the packaging and single-use plastic replacement segments.

And, Clearwater Paper on Nov. 1, 2024 completed the sale of its tissue business to Sofidel for \$1.06 billion in cash — the proceeds to be used to pay down debt and strengthen its balance sheet. At the time of the sale, Arsen Kitch, President and CEO of Clearwater Paper, said, "This is the next big step in transforming Clearwater into a premier independent paperboard packaging supplier in North America."

As referees in the NFL like to say, "Upon further review...," Suzano being interested in Clearwater Paper makes sense.

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NORTH AMERICA

Novolex to Acquire Pactiv Evergreen for \$6.7 Billion

Novolex and Pactiv Evergreen in early December announced a definitive agreement to combine, creating a leading manufacturer in food, beverage and specialty packaging products.

Under the terms of the agreement, Novolex will acquire Pactiv Evergreen for \$18.00 per share in an all-cash transaction valued at \$6.7 billion, inclusive of Pactiv Evergreen's net debt as of Sept. 30, 2024.

The combination brings together two highly complementary businesses that will offer a broad product platform, establishing one of the most diverse substrate offerings in the packaging industry. The asset base will include an extensive manufacturing footprint and an expansive distribution network.

Upon the completion of the deal, Pactiv Evergreen will become a privately held company, and its common stock will no longer be listed on Nasdaq. The combined company will be led by Novolex Chairman and CEO Stan Bikulege.



"This transaction reflects the continuation of our long-term growth strategy to create the industry's most innovative, sustainable and customer-focused company," said Bikulege. "Pactiv Evergreen's strong product portfolio, along with their talented team, will complement and add significant depth to Novolex's diverse packaging solutions."

Michael King, President and CEO of Pactiv Evergreen, said, "We are pleased to reach this agreement with Novolex, which shares our commitment to product quality and recognizes our potential for future growth. The Board and leadership team evaluated a range of opportunities and are confident this transaction maximizes shareholder value and is the best path forward for all stakeholders.

This transaction is supported by funds managed by affiliates of Apollo, the majority shareholder of Novolex since 2022, and Canada Pension Plan Investment Board, which will contribute approximately US\$1 billion and will become a significant minority shareholder in the post-merger company.

The transaction has been approved by the Pactiv Evergreen Board of Directors and is subject to receipt of regulatory approvals and other customary closing conditions. The transaction has also been approved by Packaging Finance Limited, in its capacity as the majority shareholder of Pactiv Evergreen, and no other shareholder approval is required.

The transaction is expected to close in mid-2025.

Green Bay Packaging Plans Major Investment for Arkansas Kraft Paper Mill

Green Bay Packaging (GBP) announced a substantial investment in the modernization of its Arkansas Kraft paper mill in Morrilton, Arkansas. This multi-year project significantly enhances the mill's infrastructure and underscores the company's commitment to sustainable practices and operational efficiency.

The investment will encompass vital replacements of key process components, including the recovery boiler and biomass boiler infrastructure. Additionally, GBP is set to install an electric turbine generator — an integral element of the decarbonization strategy that will substantially reduce Scope 1 and 2 greenhouse gas emissions.

The project also includes the acquisition of approximately 300 acres of land for future investments and expansion, positioning the mill for the long term.

"The Arkansas Kraft Paper Mill, established in 1965 by my father, Jim Kress, has built a proud legacy as an industry leader," said Will Kress, Chairman and CEO of Green Bay

Packaging. "I am excited to share that we are making a significant investment in our Arkansas Mill. This initiative will enhance our operational capabilities and solidify our competitive edge for the future."



GBP's Arkansas Kraft Division is a fully integrated pulp and containerboard mill utilizing a sustainable combination of virgin fiber and recycled fiber to produce high quality kraft linerboard and corrugating medium.





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industry news

NORTH AMERICA

International Paper Reviewing Strategic Options for Global Cellulose Fibers Business; Closing Georgetown Mill

International Paper on Oct. 31, 2024 announced the decision to review strategic options for its global cellulose fibers (GCF) business. The decision to explore alternatives for the GCF business is consistent with the company's strategy to focus on sustainable packaging solutions.

IP's GCF business creates high-quality absorbent pulp for a wide range of applications like feminine care, incontinence and other personal care products that promote health and wellness. In addition, its specialty pulp serves as a sustainable raw material used in textiles, construction materials, paints, coatings and more.

The GCF business generated \$2.9 billion in revenue in 2023 and has operations in three countries, with eight mills and two converting facilities.

"International Paper is committed to maximizing value for our shareholders, and to that end, we have launched a comprehensive and thorough review of strategic options for our global cellulose fibers business," said



International Paper Chairman and CEO Andy Silvernail.

Clay Ellis, Senior Vice President, Global Cellulose Fibers, International Paper, explained, "GCF is focused on accelerating earnings by aligning resources with our most strategic fluff pulp customers, implementing an 80/20 mindset and creating a simplified and focused portfolio. Our team is wellpositioned to win with attractive customers in the growing global fluff pulp market."

IP has retained Morgan Stanley & Co. LLC as financial advisor to help review strategic options for the GCF business. The review of strategic options is at an early stage, and there can be no assurance that this review will result in any kind of transaction or other outcome.

Georgetown Pulp and Paper Mill

Additionally, IP announced the permanent closure of its Georgetown, South Carolina mill. The mill will shut down in stages with a full closure expected by the end of 2024.

The Georgetown mill produces approximately 300,000 tons of fluff pulp designed for a range of consumer applications from baby diapers to incontinence products. GCF plans to retain 100% of the mill's fluff pulp capacity by transferring production to other mills and further reducing the IP's exposure to commodity pulp grades.

The mill also produces uncoated freesheet papers that it sells to Sylvamo pursuant to a strategic contract, which IP and Sylvamo have mutually agreed to terminate as of December 31, 2024.

In total, the mill has 526 hourly employees and 148 salaried employees.

Irving Tissue Announces \$600 Million Expansion Project at Macon Tissue Mill

During Irving Tissue Macon's fifth anniversary celebration in November, company President Robert K. Irving unveiled its latest expansion project.

"I am very pleased to announce our Phase 3 expansion at Irving Tissue Macon. The \$600 million investment will add another 100 jobs and include a third ThruAir Dry paper making machine, additional converting lines, and a new fully automated warehouse," Irving said.

"On top of the growth in Macon, this investment will also provide growth in our home region of the northeast — Maine and New Brunswick. Pulp will be supplied from our pulp mill in Saint John, which in turn is supplied from the six million acres we sustainably own or manage," Irving added.

Irving Tissue's plant, located in Macon, Georgia, currently employs more than 400 people. It produces ultra-premium quality household paper products including soft bath tissue and high-quality paper towel that is both strong and absorbent.

The Phase 3 expansion will increase Irving Tissue's annual ThruAir Dry capacity by 75,000 tonnes, the equivalent of 15 million cases. Total annual capacity at the Macon plant will



now be 225,000 tonnes, the equivalent of 45 million cases.

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NORTH AMERICA

Clearwater Paper Closes \$1.06 Billion Sale of Its Tissue Business to Sofidel

Clearwater Paper on Nov. 1 announced the successful completion of the sale of its tissue business to Sofidel America Corp., a subsidiary of Sofidel S.p.A., for \$1.06 billion in cash, prior to customary purchase price adjustments.

Terms of the sale were first announced in July 2024.

The transaction represents a significant step in Clearwater Paper's transformation into a premier independent supplier of paperboard packaging products to North American converters.

"This is the next big step in transforming Clearwater into a premier independent paperboard packaging supplier in North America," said Arsen Kitch, President and CEO of Clearwater Paper. "While it's the right business decision, it's a bittersweet moment for our company. We are parting ways with valued colleagues, and that's difficult. The Tissue team has built a fantastic business and delivered strong results. I am proud of their work and wish them well.

"We'll use the proceeds from the sale to pay down debt and strengthen our balance sheet. We will be well positioned to scale and diversify our paperboard business to create longterm value for our shareholders," Kitch added.



Billerud to Invest in Escanaba and Quinnesec Mills in Michigan

As part of an updated strategy going forward, Billerud announced an investment program of approximately SEK 1.2 billion (approx. \$109.4 million) in its Escanaba mill and SEK 0.2 billion (approx. \$18.2 million) in the Quinnesec mill (both mills are located in Michigan).

According to the company, these investments will enable the transition towards paperboard production.



"We have an exciting plan in North America going forward, benefitting on sizable market opportunities, coupled with our attractive Midwest location, competitive assets and excellent paperboard capabilities in Billerud," said Ivar Vatne, Billerud's President and CEO.

"The evolution investments will be carried out in phases and in alignment with the mills' scheduled maintenance shutdowns to minimize production disruptions. The upgrade of the woodyard in Escanaba is set to begin immediately, with the bulk of the work scheduled for the second half of 2025," Vatne explained.

Sonoco to Sell Thermoformed and Flexibles Packaging Business for \$1.8 Billion

Sonoco Products Company has entered into an agreement to sell its Thermoformed and Flexibles Packaging business ("TFP") to TOPPAN Holdings Inc. for approximately \$1.8 billion on a cash-free and debtfree basis and subject to customary adjustments.

The transaction, which reflects the completion of the previously announced strategic review of Sonoco's TFP business, is subject to customary closing conditions, including regulatory approvals, and is expected to close in the first half of 2025.

Net proceeds from the transaction are expected to be used to repay existing debt.

"The decision to sell our TFP business accelerates our portfolio simplification strategy, streamlines our organizational structure, and enables more focused capital investments in our remaining industrial paper and consumer packaging businesses," said Howard Coker, Sonoco's President and Chief Executive Officer. "TFP is a great business with leadership positions in its served markets.

"We greatly value TFP's tenured history as part of the Sonoco family, and I am personally proud of their long-standing commitment to serve our customers with both innovative and high quality packaging products. We will work closely with Toppan to ensure a successful transition for our employees, customers, and suppliers and wish the entire team all the best in the future," Coker concluded.

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industry news

NORTH AMERICA

Georgia-Pacific to Invest \$90 Million at Crossett Tissue Mill

Georgia-Pacific is investing \$90 million at its Crossett, Arkansas, mill to continue growing its retail consumer tissue business. The investment will increase converting capacity for high quality bath tissue, such as the company's Angel Soft brand.

Initial production from this project expected in 2026.

"I am proud of our Crossett team members and their ongoing work to make this a safe, competitive and strategic location for our Consumer Products business," said Deb



Coduto, vice president of manufacturing, at the Crossett mill. "This investment reflects their dedication to our mill, our customers and consumers and to the community that supports us."

By the end of this project, Georgia-Pacific will have invested more than \$250 million at Crossett since 2019.

The Crossett mill makes bath tissue for the consumer market and currently employs more than 400 people.

Irving Paper Reduced Operations Temporarily Due to Record High Industrial Electricity Rates

Irving Paper, located in Saint John, New Brunswick, Canada, had to once again shut down 50 percent of its operations beginning December 2 in response to NB Power's record high industrial electricity rates, and remained down for at least a week.

"NB Power's continued delays at the Point Lepreau generating station have resulted in electricity rates being over one hundred percent higher than historic levels," said Mark Mosher, Vice President of Pulp & Paper, J.D. Irving, Limited. "No business can absorb price increases of that level without negative impacts. Irving Paper has shut down or reduced its operations over 30 days so far in 2024, with more expected."

Irving Paper manufactures 400,000 tonnes of paper annually, over 95 percent of which is exported to 65 countries. Current electricity rates have a massive impact on Irving Paper's ability to compete.

Due to the nature of the pulping process, electricity usage is intensive and unavoidable. Irving Paper has historically been the provincial utility's biggest customer with annual costs in the range of \$60 million. Projections see that increase to well over \$80 million in 2024 and \$100 million in 2025, with significant downtime built in to avoid a much higher bill.



"We have invested significantly into alternate energy sources and making our facilities as energy efficient as possible in an effort to offset the province's high electricity costs," Mosher added. "Without clear policy to address these bigger structural competitive issues, NB's industrial base will continue to contract."

Domtar Acquires Iconex Paper's Point-of-Sale Receipt Business in North America

Domtar in November announced the successful acquisition of Iconex Paper from Atlas Holdings.

Terms of the deal were not disclosed.

Iconex Paper converts thermal paper parent rolls into point-of-sale (POS) receipt rolls, serving customers in industries such as food service, retail, pharmacy and financial services from its five North American locations in Arizona, Kansas, Tennessee, Virginia and Mexico. "Receipt products used by consumers every day — such as ATM, gas pump, food service and retail receipts — begin with thermal paper manufactured at Domtar's West Carrollton, Ohio, facility," said Steve Henry, Domtar's president of Paper and Packaging. "With this acquisition, we're well positioned to ensure customers experience the operational and supply chain excellence that comes from a fully integrated North American receipt paper business.

"We are delighted to welcome Iconex Paper to the Domtar family, and we look forward to jointly strengthening the pointof-sale paper business," Henry added.

Mike Rapier, president of Iconex Paper, will continue to lead the business and report to Domtar's senior management.

REPAIR & SERVICES



End Costly Downtime:

Eliminate Alignment Issues with New Coupling Technology

FRANK MATHEWS, MOTION

In paper mills, machinery misalignment too often leads to costly downtime. While industrial couplings compensate for it to some degree during power transmission, misalignment will always exist, occurring in the horizontal or vertical planes.

However, when it comes to misalignment and its forms, most couplings are limited in compensation capabilities. To ensure proper reliability, laser alignment is used to minimize this misalignment. Most couplings function better as misalignment becomes minimal. However, conditions change once machinery runs under load, and the initial alignment setup can change. Excessive misalignment (1°+) creates extreme reliability issues for most of today's couplings.

Are you tired of costly downtime due to misalignment? Now, there is a game-changer for dealing with high misalignment in a close-coupled (small distance between shaft ends, or DBSE) arrangement. Motion Mill Services partnered with Thompson Couplings Ltd., to produce an industrial constant velocity joint coupling: the **Thompson Coupling Alignment Eliminator Short Taperlock (TCAE ST)**. The first of its kind, this coupling brings a tried-and-true constant velocity (CV) design to the industrial market.

Most automotive front-wheel drive applications feature this same type of technology with extremely reliable results—and paper mills can realize similar success. CV couplings are a true constant velocity design that can accommodate multiple forms of misalignment while still functioning with static output speed. The **TCAE ST** eliminates alignment concerns, with up to 10° of operating angularity without laser alignment. Additionally, component life is extended since no radial loads are applied to the drive or driven shafts. For example, in a process pump application, packing life would be improved due to reduced radial loads applied on the pump input shaft under operation.

The **TCAE ST**'s fully sealed, maintenance-free design reduces costs because no alignment is needed, freeing up maintenance crews' time and bolstering machinery reliability.



With the TCAE ST coupling, the sealing boot is protected inside the sleeve itself, minimizing escaping grease and contamination.

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A certified mechanical engineer, Frank Mathews is the Division Manager – East Shops and has 14 years of experience with driveshafts and their applications. For more information, visit **MiRepairandServices.com.**



EUROPE

Seaman Paper Acquires German Paper Manufacturer Julius Glatz

Massachusetts-based Seaman Paper Company has acquired Julius Glatz GmbH ("Glatz"), a family-owned company and a leader in producing high-quality technical specialty paper products. The company is based in Neidenfels, Rhineland-Palatinate, Germany.

Terms of the deal were not disclosed.

The acquisition of Glatz and its subsidiaries (Julius Glatz, PaperTec, and Glatz TransTec) bolsters Seaman Paper's longstanding presence in Germany and adds to its technological capabilities in the production and converting of specialty paper packaging solutions replacing single-use plastics across the globe.

Glatz's business divisions and production facilities will continue to operate and will be strategically supported and expanded. The approximately 240 employees of Glatz will join Seaman Paper's global team.

Julius Glatz will remain a legally independent entity, and the Glatz brand will be preserved to further strengthen its market position globally from its German base.

With this acquisition, Seaman Paper complements its existing presence in Rastatt, Germany, acquired in 2015, which employs 40 people specializing in tissue and crepe paper production.

"Glatz has been a trusted partner of Seaman Paper for many years, and as family-owned businesses, we share the same core values," said Kenneth Winterhalter, CEO of Seaman Paper. "This acquisition is the natural next step to deepen our collaboration and begin



an exciting new chapter together.

"We are committed to investing in Glatz's growth in the region, increasing production capacity at the Glatz facilities, and leveraging their technology to develop new product lines and explore new markets," Winterhalter added.

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industry news

EUROPE

Mayr-Melnhof Karton to Sell TANN Group for EUR 360 Million

Mayr-Melnhof Karton (MM) has agreed to sell 100% of its shares in TANN Group to Evergreen Hill Enterprise, part of an Indonesian-based privately held group of diversified companies, for a cash and debt-free enterprise value of EUR 360 million.

Headquartered in Traun, Austria, TANN Group prints on and finishes externally sourced fine paper to produce tipping paper for the cigarette industry. As the business is unrelated to cartonboard and consumer packaging, MM has decided to sell it.

TANN Group generates annual sales of approximately EUR 220 million. TANN

comprises 7 production sites in Austria, China, the Philippines, Turkey, Canada and Germany and a global workforce of around 730 employees, who will join Evergreen Hill Enterprise.

"The sale offers MM the opportunity to further strengthen and expand the position in its core consumer packaging business," said Peter Oswald, CEO of MM. "We are delighted that TANN Group gets a new strategic owner with Evergreen Hill Enterprise, Pte. Ltd. which is committed to investing in its future."

The transaction, which is subject to usual completion conditions and regulatory



approvals, is expected to be closed in the first quarter of 2025.

Metsä Board Introduces QR Code with Recycling Information for All Its Delivery Packaging Materials

Metsä Board has launched a new solution to enhance and simplify the recycling process for packaging materials customers receive as part of Metsä Board product deliveries — QR codes on the pallet and reel labels of its products for all volumes delivered to its customers. The QR code directs customers to an intuitive app that provides detailed information on the various packaging materials used to protect the paperboard during the logistics chain. This information will assist customers in determining how each component of the delivery's packaging should be recycled.

By providing accessible and clear recycling information, the company aims to make it as easy as possible for customers to sort and recycle all the materials they receive with the product deliveries. In addition, customers will be able to reduce the amount of waste sent to landfills and ensure the materials are recycled as part of the local circular economy loop.

Isto Hongisto, Product Safety Specialist at Metsä Board, noted, "Recycling can



sometimes be complex, and our goal is to make it as seamless and straightforward as possible for our customers. This initiative will not only save them time, but it will also ensure that the materials used in our deliveries are recycled in an optimal way."

The QR codes have been visible on all Metsä Board's paperboard deliveries as of November 2024.

Lecta Announces Spin-Off of Its Self-Adhesive Business

Lecta has announced the spin-off of its Self-Adhesives business unit from Torraspapel, effective as of Jan. 1, 2025. It encompasses the creation of the new company Lecta Self-Adhesives España, S.L.U., which will take over all activities, agreements and commercial relationships relating to the Lecta's self-adhesives business, including all its selfadhesive products.

This decision reflects Lecta's transformation and specialization of the Lecta Group that has taken place in recent years, which already envisioned the spin-off of its distribution business in Southern Europe and is now focused on its self-adhesive materials unit.

In a written statement, the company said, "With this new structure, Lecta seeks to optimize the management and profitability of the business through specialization, increase production efficiency and analyze and adapt the opportunities of each business unit to market demands and the needs of its customers."

Lecta Self-Adhesives España will maintain its headquarters in Barcelona, Spain.

EUROPE

Mondi Completes Energy Efficiency Projects at Neusiedler Mills in Austria

Mondi has completed EUR 20 million in energy efficiency projects at its Neusiedler uncoated fine paper mills in Austria. The full benefit of the upgrades is expected from the first quarter of 2025, including reduced greenhouse gas emissions and increased energy efficiency and operational safety.

The program includes four key projects at the Kematen pulp and paper mill: rebuild of the recovery boiler and associated infrastructure to increase energy efficiency and improve overall performance; upgrade of the pulp dryer from gas burners for air heating to steam heat exchangers to eliminate emissions and further improve safety; installation of a new steam accumulator to balance fluctuations in steam demand which improves efficiency and turbine performance; and revamp of the steam turbine with a new rotor to increase



electricity production.

Additional enhancements include a new steam system and heat recovery at the paper machine and winder optimization to improve customer reel output.

The program also included upgrades at the Theresienthal site to improve the efficiency

of the paper machine's steam and condensate system, increase automation in the additive kitchen, and introduce a refined winder concept.

The investment program was funded by Mondi with the support from the European Union – NextGenerationEU.

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industry news

NEW ZEALAND

Oji Fibre Solutions to Permanently Shut Kraft Linerboard Machine at Kinleith Mill

Oji Fibre Solutions (OjiFS) in November announced plans to permanently shut paper machine 6 (PM6) at its Kinleith pulp and paper mill in Tokoroa, New Zealand.

The Kinleith Mill operates one paper machine, PM6, with the capacity to produce approximately 330,000 tonnes per year of kraft linerboard (from virgin fiber and recycled fiber). The mill also produces about 265,000 tonnes per year of bleached softwood market pulp.

Dr. Jon Ryder, CEO of OjiFS, explained, "After extensive work and considering a variety of options, we are proposing to simplify Kinleith Mill's operations by focusing on pulp and discontinuing loss-making paper production. Therefore, we are consulting on a plan to permanently shut the Kinleith PM6 paper machine and move to a paper import model for our packaging operations."

In August of this year, OjiFS announced

plans to close its Penrose mill in Auckland, New Zealand, following three years of losses. The Penrose Mill had the capacity to produce about 78,000 tonnes per year of recycled medium liner.

"Manufacturing paper has become unprofitable. Paper production at Kinleith Mill has suffered significant losses for several years and we see no prospect of the situation improving," Ryder said.

"Due to the complexities of operational changes required at the mill for this proposal, the exact number of potential job losses is unknown at this stage. However, we anticipate approximately 230 roles may be affected.

"This proposal takes into account our ability to continue to serve our customers with as little disruption as possible. We propose to continue producing paper at Kinleith



Mill through to the end of June 2025, to ensure we meet our packaging customer obligations and provide a smooth transition to new paper supply arrangements.

"We will now enter a consultation period with employees at Kinleith Mill, through to early January, to see if there is an alternative we have not yet considered. We anticipate announcing a decision by end of January 2025," Ryder concluded.

INDUSTRY SUPPLIERS Valmet to Deliver SymBelt Upgrade to Mercer Stendal in Germany

Valmet will deliver a SymBelt Shoe Press Roll upgrade with Valmet Black Belt shoe press belt and SymBelt services to Mercer Stendal pulp mill in Germany.

The delivery will take place during the mill's annual shutdown in the fourth quarter of 2025.

The SymBelt Shoe Press Roll upgrade consists of a specially designed SymBelt Pin Head, ensuring an accurate belt installation and improved belt lifetime. The upgraded SymBelt Shoe Press roll will be equipped with a Valmet



Black Belt that, together with regular servicing, secures the roll's optimal performance.

"Valmet is the original equipment

manufacturer of our pulp drying line and we are convinced of their ability to renew our SymBelt Shoe Press Roll," said Henning Schröder, Maintenance Supervisor at Mercer Stendal. "We also believe that the overall solution, including Valmet Black Belt and roll services for the years to come, will significantly improve the performance of the pulp drying line's press section."

The delivery will take place during the mill's annual shutdown in the fourth quarter of 2025.

INDUSTRY SUPPLIERS

Buckman Earns Platinum Medal from EcoVadis for Sustainability Performance



Buckman has achieved a Platinum Medal rating from EcoVadis. The platinum rating places the company in the top 1% globally of

more than 130,000 companies.

The EcoVadis assessment evaluates 21 sustainability criteria across four core themes: Environment, Labor & Human Rights, Ethics and Sustainable Procurement.

"This achievement is not just a badge of honor; it reinforces our corporate values and strengthens our reputation in the industry," said Junai Maharaj, CEO of Buckman. "It demonstrates to our stakeholders, customers and community that we prioritize sustainability and governance in every aspect of our operations." EcoVadis' business sustainability ratings are based on international sustainability standards such as the Ten Principles of the UN Global Compact, the International Labour Organization (ILO) conventions, the Global Reporting Initiative (GRI) standards and the ISO 26000 standard. The ratings provide an evidencedbased analysis on performance and an actionable roadmap for continuous improvement.

Kadant Black Clawson Acquires Tornado Pulper Product Line

Kadant Black Clawson, a subsidiary of Kadant Inc., announced the acquisition of the Tornado pulper product line from Bolton Emerson Americas. The Tornado pulper is a high-shear pulper capable of both tearing and fibrillating fibrous materials. "The Tornado pulper expands Kadant's influence with our current pulp and paper and molded fiber customers and provides entry into the growing global textile and carpet recycling industries," stated Chris Demler, President of Kadant Black Clawson. "It handles materials that are exceptionally difficult to recycle, such as cured wet-strength materials, and is perfectly suited for mills requiring an economical, low-maintenance, compact pulper."



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INDUSTRY SUPPLIERS

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PAPER

Canfor Pulp recently named Stephen Mackie as President and Chief Executive Officer, effective Nov. 1, 2024. Mackie replaces Kevin



Stephen Mackie

Edgson, who left the company on October 31. Mackie will also retain his responsibilities as Executive Vice President, North American Operations of Canfor Corporation, a position he has held since October of 2021.

Georgia-Pacific has appointed Hudson Pope to the senior vice president of operations position with responsibility for all



Hudson Pope

manufacturing segments. Pope succeeds Jeff Koeppel, who will retire in the first quarter of 2025. Prior to his appointment, Pope served as senior vice president for manufacturing at Georgia-Pacific. He brings nearly 30 years of experience in the pulp and paper industry, beginning his career with Georgia-Pacific as a co-op process engineer for the company's Crossett, Arkansas, facility.

Green Bay Packaging has promoted Lucas Law to Mill Manager for the company's Arkansas Kraft Division.



Lucas Law

Law joined the company in March of 2011 as E&I

Supervisor and since that time has served as E&I Superintendent and, most recently, as Maintenance and Reliability Manager.

Hood Container appointed Alan Clark as the new President and Chief Operating Officer, effective Jan. 1, 2025. Clark succeeds Charlie Hodges, who will retire after a nearly 50-year

career in the pulp and paper business and the last 12 years as the founding President of Hood Container. Prior to

Hood Container, Hodges built his career with companies such as Union Camp, Georgia Pacific, and Port Townsend Paper Company.

Metsä Board has appointed Laura Remes as SVP, Business Development and a member of the Corporate Management



Laura Remes

Alan Clark

Team. Remes joins Metsä Board from UPM, where she most recently held the position of Vice President, Strategy, Research and Development since 2022. Prior to that, she served as General Manager of UPM's Tervasaari mill from 2019-2022. Remes worked at UPM for 14 years in various business development and management positions.

■ SCA has appointed Petteri Kalela as the new manager of the business areas Containerboard and Pulp and member of the group manage-



ment, effective no later than June 1, 2025. He succeeds Mats Nordlander, who left SCA at the turn of the year. From 1996 and 2023, Kalela worked for UPM in various roles in production, sales, supply chain, as well as five years as head of UPM Specialty Paper in China. Since 2023, he held the position of Senior Vice President at Huhtamaki Fiber & Food Service Europe.

UPM has appointed Mika Kekki as Executive Vice President of UPM Specialty Papers. He will continue to be a member of UPM's Group





Mika Kekki

Kekki held the position of Executive Vice President of UPM Plywood. He joined UPM in 1994 and has been a member of the Group Executive Team since 2021.

INDUSTRY SUPPLIERS

Motion Industries has promoted Eric Gonzalez to senior vice president of Mexico, Canada, industry segments and



Eric Gonzalez

business development. Gonzalez has been with Motion for 26 years and most recently served as group vice president for the Southwest Group and Mexico.

RETIREMENT

Jukka Tiitinen. Area President, North America. for Valmet. has decided to retire after a long and successful career at Valmet.



Jukka Tiitinen

Jukka began his career at Valmet in 1987 as an engineering summer trainee. Before assuming leadership of the North America Area in 2021, he led the Asia Pacific organization from 2017 to 2021 and the Services business line from 2011 to 2017. Prior to that he held various management positions in Valmet and Metso. Jukka stepped down from his role on Dec. 31, 2024.

JANUARY 21-23, 2025

2025 Paper Distribution Conference National Paper Trade Association (NPTA) Ritz-Carlton Golf Resort Naples, Florida, USA www.gonpta.com/Events

FEBRUARY 10-13, 2025

Paper Week Canada 2025 PAPTAC Fairmont Queen Elizabeth Hotel

Fairmont Queen Elizabeth Hotel Montreal, Canada www.paperweek.ca

FEBRUARY 19, 2025 Converters Expo South

BNP Media Packaging Group Greenville Convention Center Greenville, South Carolina, USA www.packagingstrategies.com/ converters-expo-south

FEBRUARY 21-23, 2025 ASPI Spring 2025 Meeting

Assoc. of the Suppliers to the Paper Industry Sand Pearl Resort Clearwater Beach, Florida, USA www.aspinet.org

MARCH 5-7, 2025

Sustainability in Packaging US

Smithers Swissotel Chicago Chicago, Illinois, USA www.sustainability-in-packaging.com

APRIL 8-10, 2025 Tissue World Düsseldorf

Informa Markets Messe Düsseldorf Düsseldorf, Germany www.tissueworld.com

APRIL 23-25, 2025 PPC Spring Outlook &

Strategies Conference Paperboard Packaging Council JW Marriott Indianapolis Indianapolis, Indiana, USA paperbox.org/event

APRIL 30 - MAY 2, 2025

AICC 2025 Spring Meeting The Independent Packaging Association Hyatt Regency Coconut Point Resort Bonita Springs, Florida, USA www.aiccbox.org

MAY 4-7, 2025

TAPPICon 2025

TAPPI Minneapolis Convention Center Minneapolis, Minnesota, USA tappicon.org

MAY 20-21, 2025

Converters Expo

BNP Media Packaging Group Lambeau Field Green Bay, Wisconsin, USA www.packagingstrategies.com/ converters-expo

JUNE 1-3, 2025

International Pulp Week Pulp and Paper Products Council Pan Pacific Vancouver Vancouver, BC, Canada internationalpulpweek.com

SEPTEMBER 16-18, 2025

Paper Meets LIVE! 2025 AF&PA and NPTA Opal Sands Resort Clearwater Beach, Florida, USA www.afandpa.org/events



recycling matters .



New Data Tells a Familiar Story: Paper Recycling Success is Strong

By Heidi Brock, President and CEO, American Forest & Paper Association

E very day, millions of Americans, businesses and manufacturers interact with the paper recycling system. From cardboard boxes to office papers, each item placed in the recycling bin underscores both the circularity of paper recycling and the policies that underpin it.

One of the most critical tools available to measuring paper recycling's success is the American Forest & Paper Association's (AF&PA) annual paper recycling rate data. It is an important metric to measure progress and inform decisions about policies and investments that support our paper recycling infrastructure.

We recently announced an updated recycling rate methodology that recognizes two realities. First, the way consumers interact with our recycling system is changing. And second, that global supply chain and paper recovery markets are rapidly evolving. Utilizing extensive industry data, subject matter expertise and detailed U.S. trade data, this updated methodology now reflects the amount of paper recycled as a share of the amount of paper available for recovery, rather than the share of the amount of paper used.

Based on our updated methodology, the 2023 U.S. paper recycling rate



Utilizing extensive industry data, subject matter expertise and detailed U.S. trade data, AF&PA's updated methodology now reflects the amount of paper recycled as a share of the amount of paper available for recovery, rather than the share of the amount of paper used.

was 65-69%, illustrating that paper recycling is a sustainability success story no matter the metric. In fact, the paper industry recycles nearly 60% more paper today than it did in 1990. In 2023, nearly half of recycled paper went into making cardboard boxes.

Today, we are working to capture even more paper from waste streams to be recycled into new, sustainable everyday paper products. Since 2019, our industry has announced or is expected to complete projects by 2025 that will use more than 9 million tons of recycled paper. These include construction of new mills, conversions and expansions of existing mills, and updating machinery and other equipment to use even more recycled paper in paper products and packaging.

Thanks in part to paper industry investments, 94% of Americans have access to community paper and paperboard recycling programs. And 79% of Americans have access to residential-curbside programs — an increase of more than 14 million people over the past 10 years.

Our industry is building on this success and ensuring strong consumer participation with our recycling system by encouraging community involvement and improving education around proper recycling best practices to further boost residential recycling rates.

The paper industry has a key ownership stake in America's recycling system. Our members own and operate more than 100 materials recovery facilities (MRFs) nationwide where recyclables are sorted and processed into bales of recovered paper that get shipped to pulp and paper mills. Nearly 80% of U.S. paper mills use some recycled paper to make new, sustainable paper products. Paper recycling is essential to our industry's effort to achieve important sustainability goals and build a more circular value chain.

That is why this AF&PA's updated methodology is important.

No matter how you measure it, paper recycling is a success story. It is clear paper recycling is a leading example of how industry, policymakers and consumers are partnering to build a strong, sustainable, circular economy.

Now, may each of us set a goal to spread that good news.

About AF&PA

The American Forest & Paper Association (AF&PA) serves to advance U.S. paper and wood products manufacturers through fact-based public policy and marketplace advocacy. The forest products industry is circular by nature. AF&PA member companies make essential products from renewable and recycle resources, generate renewable bioenergy and are committed to continuous improvement through the industry's sustainability initiative — *Better Practices, Better Planet 2030: Sustainable Products for a Sustainable Future.*

The forest products industry accounts for approximately 5% of the total U.S. manufacturing GDP, manufactures about \$350 billion in products annually and employs about 925,000 people. The industry meets a payroll of about \$65 billion annually and is among the top 10 manufacturing sector employers in 43 states.

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Section 5.1
Section 4.1
Section

On Track for Sustainable Packaging

The construction of Graphic Packaging's new CRB mill in Waco, Texas, is progressing very well, and the installation of its new paper machine is underway.

By John O'Brien, Managing Editor



raphic Packaging's President and CEO, Mike Doss, in early February of 2023 announced plans to build a greenfield CRB (coated recycled board) pulp and paper mill in Waco, Texas — an investment of approximately \$1 billion over three years that will be internally funded with operating cash flow.

In addition to the paper mill, the facility's pulp mill features an advanced pulping technology that will include the capability of repulping paper cups.

Location, Location, Location

Doss explained that Waco was selected given its centric location in Texas, giving the new mill access to a strong supply of recycled fiber material from urban centers in the region, among other desirable elements. "The city of Waco is situated in the Texas Triangle. Our new mill will be strategically located within 200 miles of approximately 80% of the population in Texas providing easy access to a strong existing recycled fiber basket. Waco also has existing infrastructure to support a mill as well as advantaged logistics from a rail and roadway perspective to supply our packaging facilities and our customers," Doss explained.

Enhancements Bolster Environmental Footprint

According to Graphic Packaging, the Waco facility features three key enhancements from its mill in Kalamazoo, Michigan, which started up a new CRB machine — K2 — in the fourth quarter of 2022.

The first is incorporation of a blended fiber line, which enables 250,000 tons of recyclable

graphic packaging waco mill

scrap paperboard to be repurposed from Graphic Packaging facilities across the United States.

The second is the horizontal drum pulper, which can take the equivalent of up to 15 million paper cups a day and process them into material that is suitable for recycling back into first-line packaging.

Finally, the operation will feature a co-generation plant that enables the plant to generate its own energy, using the heat and steam byproducts in the paperboard drying process.

"We are investing significantly to improve the environmental footprint of our paperboard manufacturing facilities with initiatives to expand our renewable fuel and our recycling capability," Doss said. "We see a bright future in recycled and recyclable packaging, and I'm excited that this facility will play such a meaningful role."

Machine Installation Underway

Just over one year after installing the first steel beam, the installation of the paperboard machine at Waco is underway, as the overall mill site itself takes shape.

The new paperboard machine is modeled after the K2 machine in Kalamzoo.

Valmet, the supplier of the new machine and K2, said the new CRB machine will produce coated recycled board grades with an annual capacity of approximately 500,000 short tons which corresponds to 456,000 metric tons.

Michael Gray, Vice President, Capital business, North America, for Valmet, added, "Valmet has a very good relationship with Graphic Packaging International, and we have had successful projects with them. We are happy to be involved in this important project to provide a state-of-the-art coated board machine for their optimized mill network in the United States."



Structural steel for the machine hall is complete and preparation for major equipment installation is well underway.

Valmet's delivery for the new coated board machine will include equipment for stock preparation, approach flow systems, the board machine with extensive process ventilation scope, a wide Valmet DNA automation package and a winder.

In addition, Valmet will provide Graphic Packaging with an operator training program that includes a site-specific Valmet Training Simulator for the Waco mill. The Training Simulator is an exact digital copy of the mill's processes and controls, allowing personnel to safely practice hands-on procedures and scenarios to strengthen safe behavior and prepare for troubleshooting. The simulator has a planned delivery for the first quarter of 2025 with interactive training being done during the start-up and commissioning period.

Advanced Pulping Technology

The Waco mill will feature advanced pulping technology that will allow it to process paperboard waste and recovered paper cup stock.

"We will be increasing circularity of our system through an enhanced drum pulper investment," Doss said. "This investment increases our ability to clean and separate a broader range of secondary fibers. Today, a large percentage of our paperboard waste that we cannot recycle is exported.

"Our Waco mill is designed to enable the recycling a 100% of our own internally generated paperboard side rolls and waste. We plan to capture the value of that fiber as well as reduce the environmental impact of shipping the fiber offshore for processing. We are estimating around 200,000 tons of side rolls and waste will be processed at the Waco mill versus purchasing external secondary fiber as we do today. This will also significantly enhance the security of the secondary fiber supply," Doss pointed out.

"This machine also increases our paper cup recycling ability," Doss added. "The drum pulper has the capacity to process up to 15 million paper cups per day. To take advantage of this increased recycling capacity, we have launched teams to engage with our customers and recycling partners to increase the collection rate of paper cups to further

graphic packaging waco mill .



The horizontal drum pulper can take the equivalent of up to 15 million paper cups a day and process them into material that is suitable for recycling back into first-line packaging.

support recovery and a more circular economy."

In addition, the new plant is slated to improve the company's overall environmental footprint. As Graphic Packaging optimizes its network of paper mills and packaging facilities, absolute greenhouse gas emissions are projected to decrease by about 12 percent.

The Waco mill will also feature smart technologies such as a gas turbine, to generate all the electricity needed by the mill, as well as produce steam for paperboard drying, which will improve overall efficiency and reliability.

"I know this facility is going to be a great part of the Waco community," Doss said. "It'll help support that shift in society towards a circular economy – and that's really exciting for us."

On Schedule

As of the end of October 2024, deliveries are on schedule, structural steel installation is complete and the first round of hiring has taken place. The company noted that due to modest cost inflation and targeted project scope expansion, the expected total cost will be \$1.1 billion. Ultimately, the new mill remains on track for a Q4 2025 startup.

During a third quarter 2024 earnings

call on October 29, Graphic Packaging's Executive Vice President and Chief Financial Officer, Stephen Scherger, provided an overview of the progress at Waco.

"The Waco investment is progressing very well. Deliveries are on schedule and the decision earlier this year to accelerate equipment orders meant that we did not have much exposure to the port strikes. Key equipment like head boxes, dryers, rolls, et cetera, are either already on site or already in the United States if they were coming from overseas.

"At this point, structural steel for the machine hall is complete and preparation for major equipment installation is well underway. We have as many as 1,400 contractors on site and have begun the hiring process for our full-time team. We have, however, experienced some modest project cost inflation that we have not been able to offset elsewhere and have made targeted modifications to the facilities front end processes to drive additional cost and quality advantages," Scherger pointed out.

During the same earnings call, Doss added, "The Waco, Texas, recycled paperboard manufacturing facility investment remains on track for the fourth quarter 2025 startup. We have recently begun the hiring process and made our first hires. The pool of applicants we are seeing is excellent, as expected. An attractive labor pool is one of the key reasons the company selected Waco for this important strategic investment.

"Once Waco is up and running, we'll be able to service the entire North American market with the highest quality coated recycled paperboard from two locations — Michigan and Texas. Waco will further expand the company's longterm competitive advantage in both cost and quality," Doss concluded.

Committed to Sustainability

After visiting the Waco site in October 2024, Doss commented, "The last time I was here, we were pulling up the first piece of structural steel. Now, almost all of the steel work is complete. We've actually started installing our paperboard machine. We're well on our way to bringing this facility to life.

"... a lot of people talk about being part of the circular economy. I think these types of investments really show we're very committed to it. The paperboard we use here in Waco will ultimately become cereal cartons, cake cartons, carrier cartons, all kinds of packaging that consumers can feel good about because it can be recycled time and time again.

"Graphic Packaging is a leader in consumer sustainable packaging, and I'm just thrilled about the opportunities for the company as we go forward here," Doss continued. "We rolled out our Vision 2030 back in February. We've got a very ambitious set of plans that we're going to achieve over the next six years. We've got roughly 25,000 employees that just come to work every day; bring their best ideas, and are helping us figure out how to create new and innovative packages that are really benefiting society. That's something I take a lot of pride in." ■

Cut changeover time in half with easy-to-install refiner segments



Mills often face challenges with traditional refiner segments, from excessive weight to time-consuming changes. What if there was a solution that could reduce segment weight by 75% and decrease changeover time by as much as 50%? Designed for higher refining capacity, lower intensity, and longer plate life, Valmet's Pro safe segments provide a practical answer to common refining issues—helping mills improve safety and productivity.

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Cultivating Positive Safety Culture in the Pulp and Paper Industry

By taking a collaborative approach to health, safety and environment, members of the pulp and paper industry can improve mill safety from the woodyard to the finishing section.

By Kyle Wismer and Nick Lising, Valmet

The pulp and paper industry has begun to take a renewed, collaborative approach to health, safety and environment (HSE) on the worksite. Many organizations are promoting an open dialogue between mills, original equipment manufacturers (OEMs) and contractors. Together, they are focusing on developing positive safety attitudes, skills and behaviors that go beyond occupational safety compliance and move toward a goal of zero harm. This goal demonstrates a deeper acknowledgment and understanding of situational risk, as well as meaningful adjustments to reduce it.

The organizations leading this initiative are making progress toward a positive safety culture by implementing new processes and behavior-based programs, as well as supporting others as they begin to renew their focus on site safety. With effective planning, commitment to common goals and rules, clear responsibilities, good coordination and open communication, partners across the pulp and paper industry can help ensure everyone on a worksite goes home healthy and safe. Here are three ways that organizations across the pulp and paper industry can work together to maximize worksite safety.



Authors: (far left) Kyle Wismer, HSE Manager, NA Field Services & Automation, and (far right) Nick Lising, Senior Manager, HSE at Valmet in North America.

1. Establishing Expectations Through HSE Meetings

When beginning a new project, it's easy to think about what needs to be done to complete the work. It takes a little more care and awareness to think about what needs to be done to complete the work safely. To cultivate a positive safety culture on the worksite, mills can hold HSE meetings and safety kickoffs for new projects and planned shutdowns. Such meetings can include employees, OEMs, contractors and other partners.

HSE meetings are examples of behavior-based safety programs. Behaviorbased safety is a deliberate method of minimizing hazards and safety risks by predicting outcomes of behaviors, then proactively adjusting those behaviors to achieve a safer outcome. It is practiced by watching how people engage with or within a space, process or practice and making appropriate changes that improve safety. By taking the time to evaluate safety risks and hazards, teams are better prepared to work toward safer outcomes.

In addition to a kickoff, mills can hold daily HSE meetings throughout a project or shutdown's duration. These discussions with OEMs and the contractor can help determine evolving hazards and develop ongoing risk-prevention strategies. This level of pre-work understanding can get everyone in a safety mindset each day and minimize risks through repetition. Even if some conversations start to feel redundant over time, it's valuable to have them just in case anything has changed.

What can make HSE meetings so effective is communicating what's personally at stake: Why do you work safely? Some folks think of their families, activities they enjoy doing outside of work or future goals. By personalizing the message, these meetings can make the understanding more impactful and people on the worksite more intentional.

If all parties participate in planning, commitment and responsibilities, there is a greater chance that procedures will go smoothly. Making these assessments and changes while establishing expectations can help improve the safety of the shutdown, future site safety and continued HSE conversations long after.

2. Hosting Safety Summits to Establish Safety Expectations

Some mills are already working toward establishing positive safety cultures and seeking support from industry partners. These mills have hosted safety summits or conferences that include OEMs or contractors. During the summits, participants have necessary conversations about safety and how to improve it together. This allows everyone to provide their perspective, offer solutions, get by-in and gain an equal understanding that they can take to the worksite.

These summits can be a huge step to improve the safety conditions and culture at mill sites. Summits help mills develop and implement safety training and help everyone that enters a site better understand safety expectations. This level of awareness can remind personnel to keep safety top of mind and hold all parties accountable for the safety of one another.

It also improves collaboration by starting the safety conversation in a neutral way. It's important that mills remain open when visiting contractors or OEMs express a safety concern, as they can help mills identify and mitigate hazards. Fixing these hazards can prevent accidents and help staff and visitors alike to feel safe on-site.

3. Automating High-Risk Manual Processes

There are some areas and processes in a mill that have more obvious safety risks and hazards than others. While these areas and procedures may be made safer through behavior-based safety, sometimes automating manual tasks is the best accident prevention.

One example is smelt spout maintenance for recovery boilers. When manually cleaning deposits from smelt spouts, operators often come in close contact with such hazard as molten smelt, liquor and hot gases. Smelt spout robots put distance between operators and physical hazards, reducing safety risk.

For example, Valmet installed the first smelt spout robot in a North American mill in 2023. The robot performs the physical cleaning cycles, while operators program the cleaning sequence and maintain remote control. The robot is also equipped with an onboard camera so operators can evaluate performance and troubleshoot issues. In addition to improving safety, automated technology such as smelt robots can also improve efficiency and productivity, as well as free operators to focus on other priorities.

Improving Mill Success by Improving Mill Safety

In recent years, mill safety is becoming more of a priority throughout entire organizations than ever before. While in the past, safety has been driven by



Valmet installed the first smelt spout robot in a North American mill in 2023. The robot performs the physical cleaning cycles, while operators program the cleaning sequence and maintain remote control.

compliance, that is shifting. Mills are taking a step beyond meeting standards and updating processes, integrating technology, providing training and implementing behavior-based safety programs. Going beyond just checking the box, the people in organizations want to make sure everyone is safe because they genuinely care.

While operational safety is invaluable and employee well-being is reason enough on its own to practice a positive safety culture, safety can also affect the overall success of a mill. Mills with a positive safety culture can benefit from greater productivity, reduced costs and better morale and staff retention. By preventing accidents, employees may miss fewer days of work, and companies can minimize incident-related costs. Companies that tend to have a stronger safety culture may also have less turnover and be more attractive to potential hires.

As organizations begin this work, it's important to remember that implementing new processes at cultivating this kind of attention and behavioral change takes time. Mills can benefit from the positive safety culture of their OEMs and work with them to develop, implement and measure progress toward their own safety goals and create their own HSE policies. Together, members of the pulp and paper industry can make continual progress and help ensure everyone works — and goes home — safe.

Water-based Dispersion Barrier Coatings for Paper and Board Packaging

Water-based dispersion barrier coatings are proving instrumental in delivering both performance and sustainability as the industry continues to develop alternatives to plastic packaging.

By Pascal Morin, Senior Manager, Surface Additives, Application & Marketing, Americas at Kemira

> The shift away from single-use plastics is no longer just a trend — it's a concrete market reality representing significant opportunities for the pulp and paper industry. As brands and retailers increasingly commit to more sustainable packaging solutions, paper and board manufacturers stand to capture substantial market share.

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Barrier coating innovation has emerged as a critical technology for the industry to seize these opportunities. Success requires comprehensive expertise spanning the entire production process, from pulping to coating, and insight into the evolving regulatory landscape.

For paper and board manufacturers, the growing market demand for high-performance fiber-based packaging to replace plastic packaging presents both opportunities and challenges. Success in this market requires delivering highperformance materials that meet the packaging value chain's expectations while maintaining practicality, production efficiency, and costeffectiveness. Chemistry plays a crucial role in bridging this gap, enabling the production of functional, safe, and competitive paper and board packaging materials.

Kemira, a global leader in sustainable chemical solutions for water-intensive industries, is a dedicated partner in the ongoing transition to paper-based packaging, i.e. the paperization of packaging. We are focused on developing and delivering chemistry solutions that power the shift from plastic to renewable fiber-based packaging. A key focus area is the development of barrier coating solutions that provide oil, grease, and water resistance in paper, board, and molded fiber packaging. These solutions offer effective alternatives to PE-layers and fluorochemicals (PFAS) commonly used for creating barrier properties.

barrier coatings for paper and board

FennoGuard Portfolio for High-Performance Applications

With the broad Kemira FennoGuard[™] portfolio of water-based dispersion barrier coatings, we address the needs across the packaging value chain, combining brand owners' requirement for performance and packaging sustainability with manufacturers' production efficiency needs. These proven coating solutions meet diverse packaging demands, whether the target is short-or long-term grease resistance, moisture vapor control, or reliable water or liquid holdout.

FennoGuard solutions excel particularly in demanding applications, such as food packaging where high oil and grease resistance is crucial for PFAS replacement. For instance, FennoGuard GO and RP barrier coatings can deliver exceptional OGR properties with Kit values up to 12.

Recycling as the primary end-of-life option for fiber-based packaging enables waste reduction and keeps valuable fiber raw materials in circulation, ensuring their efficient reuse. All FennoGuard coatings are designed with recycling in mind — coated boards are easily repulpable, and the repulped broke can be efficiently recirculated in current paper and board making processes.

The water-based dispersion barrier coating solutions also provide versatility in application. They demonstrate proven runnability with all typical coating and printing methods while meeting converting requirements such as folding, gluing, and heat sealing for various end-use applications including folding carton boxes, flexible packaging, pouches, and cup stock.

Additionally, our solutions' open formula design allows tailoring to match the needs of individual production lines and processes, enabling cost-efficient production of barrier-coated products onsite. Formulation compatibility with



FennoGuard solutions excel particularly in demanding applications, such as food packaging where high oil and grease resistance is crucial for PFAS replacement.

pigments and additives provides opportunities to optimize solutions for specific end-use requirements in collaboration with partners throughout the value chain.

Ensuring Food Safety Without Compromise

While the industry is changing rapidly, the fundamental purpose of food packaging — protecting both the packaged contents and consumers - cannot be compromised. This requires carefully balancing functionality, sustainability, and safety, with significant attention to regulatory compliance. FennoGuard barrier coatings are approved for direct food contact and compliant with FDA regulations. Moreover, these coatings provide crucial protection against the migration of harmful mineral oil residues (MOSH/MOAH), essential for manufacturers looking to increase their recycled fiber content.

Kemira's dedicated PSRA team (Product Stewardship and Regulatory Affairs) plays a vital role in navigating this complex, evolving landscape. Their expertise helps ensure compliance with current standards while anticipating future regulations and market demands. Brand owners bear the ultimate responsibility for the safety of the packaged food and risk negative repercussions. Success depends on close collaboration and transparency across the value chain, ensuring new solutions are not just safe for food contact but also practical and cost-efficient for real-world applications.

Advancing Renewable Solutions for Biodegradable, Compostable Packaging

Kemira actively develops novel renewable barrier coating solutions that enable paper, board, and molded fiber packaging to meet demanding end-use requirements while being fully renewable, biodegradable, and compostable.

One of these avenues focuses on harnessing the potential of PHA (polyhydroxyalkanoate) in barrier coatings for fiber-based packaging. This range of renewable aqueous dispersion barrier



All FennoGuard coatings are designed with recycling in mind – coated boards are easily repulpable.



Success in barrier-coated grades requires achieving both optimal barrier performance and ensuring production and cost efficiency.

coatings is developed utilizing Danimer Scientific's advanced Nodax[™] biotechnology. PHA has an excellent biodegradability profile, which is comparable to that of cellulose, starch, and other natural polymers, making it ideal for enhancing the functional properties of fiber-based packaging material.

Versatility is key in packaging applications, and FennoGuard PHA coatings can be applied to various substrates, including paper and board as well as flexible films. Additionally, these coatings provide good converting properties, such as cold welding and heat sealability, ensuring performance in different packaging applications from cupstock to flexible packaging.

On another front, we're developing renewable, polysaccharide-based barrier coatings based on IFF's innovative Designed Enzymatic Biomaterial[™] platform. This approach enables the production of new-to-the-world biopolymers with enzymatic polymerization, creating new possibilities for renewable barriers where oxygen barrier is required and also for other performance additives in fiber-based packaging.

Comprehensive Expertise for Barrier-Coated Grades

Success in barrier-coated grades requires achieving both optimal barrier performance and ensuring production and cost efficiency — a challenge that demands expertise beyond innovative barrier coating solutions. Kemira's expertise spans decades of pulp and paper industry experience, covering the entire paper and board making process from pulping to base paper production and coating, as well as overcoming challenges with, e.g., recycled fibers and treating mill wastewaters. This comprehensive understanding is key to developing efficient and viable solutions.



Dispersion barrier coatings must form a uniform, pinhole-free film on the paper or board base sheet surface

Dispersion barrier coatings must form a uniform, pinhole-free film on the paper or board base sheet surface. That's why it's difficult to succeed with dispersion barriers by focusing only on coating chemistry and its application. Careful attention needs to be paid to the surface properties, such as smoothness or porosity or even optimizing the furnish and the ratio of long fiber and short fiber pulp. An end-to-end approach addresses multiple aspects of packaging performance and operational efficiency at the same time: from optimizing sheet formation, retention, sizing, and strength in the wet-end to maintaining proper microbiological control for hygiene requirements. This focus extends to optimizing the crucial aspects of the production process, including deposit and foam control and ensuring efficient repulping.

Conclusion

Success in the transition to paper-based packaging requires more than innovative barrier chemistry — it requires comprehensive understanding of fiber-based materials, from base sheet properties to coating application and end-use requirements. Water-based dispersion barrier coatings are proving instrumental in delivering both performance and sustainability the brands expect as the industry continues to develop alternatives to plastic packaging. By taking advantage of the combination deep process expertise and continuous barrier technology innovation, manufacturers can capture the growing fiberbased packaging market while meeting increasingly stringent requirements for food safety, recyclability, and overall sustainability.

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14

9

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New Study Steps Ahead to Promote Polycoated Paper Recycling

The following article was published by Sonoco on its website under "Insights."

Polycoated paper packaging, cartons for your milk or juice, containers for your frozen foods and boxes for your home needs are everywhere. We want to recycle them; however, the process has historically faced unique questions about the impact of resin in a product or whether municipal recycling programs want to accept polycoated paper to begin with.

While the challenges seem daunting, industry leaders believe they're solvable. They formed an alliance last year with industry organizations, brand owners and packaging producers including Sonoco to address root causes and build a roadmap toward widespread endmarket acceptance.

With nearly two dozen current members, the Poly Coated Paper Alliance (PCPA) recently completed a major step in their objective, initiating an in-depth analysis of polycoated paper recycling at material recovery facilities (MRFs), including the detection and sortation methods used. These findings will contribute to a set of design standards for recyclability, including fiber thresholds and other parameters, so companies like us can develop better packaging for the future planet and consumers.

How Much Polycoated Paper Winds Up in Our Bales?

The PCPA, with consulting firm RSS, began auditing a handful of MRFs across the country in the summer of 2024 to determine exactly how much polycoated paper already exists within mixed paper bales. The study reviewed six MRFs between June and July. Half of them, one in California, Maine and Ohio, accepted polycoated paper while the other half, another in California, Oregon and Massachusetts, did not.

Each facility's bale went to Michigan State University's Recycling Center for further review and analysis. Researchers examined two 100-pound samples from each bale and found little variance among location, regardless of whether the MRFs accepted polycoated paper or not. Full evaluations of the robustness of community educational campaigns were outside the scope of this project; however, polycoated paper, bleached or unbleached, made up just 6% of the total mixed paper bale on average, a small portion of the total collected.



Packaging Pain Points in the Flow of Materials

Of the polycoated paper collected, PCPA members then wanted to know what happened during sortation. How often did MRFs capture polycoated paper at each stage to send to the correct stream?

In August, they attached Radio Frequency Identification (RFID) tags to various packaging types — cartons, rigid paper cans, snack and laundry cardboard boxes, coffee cups, paper bags, ice cream tubs, microwaveable trays, plates, pouches and other items and reviewed material flow and recovery during three test runs on a single day. Results varied; however, the laundry box and other flat boxes performed as expected with nearly a 100% recovery rate into OCC or mixed paper.

Push-up tubes and small white pouches had the lowest performance as a portion of the smaller formats ended up with glass. Researchers also noted different outcomes with similar packaging types that had different external coatings.

Equipment type and environmental factors played a role in recovery and results represented the specific site where testing occurred, not MRFs in general. However, initial findings shed light on the designs most conducive for capture by sortation equipment at a typical recycling site.

The PCPA hopes to better quantify the amount of polycoated paper in the U.S. by expanding bale audits to facilities in the Southeast. They also hope a labscale repulpability test in the future would help determine how well polycoated paper performs at a modern paper mill.

Next Stop in the Road to Recovery

By the end of 2024, the PCPA expects to finalize test results from end-markets and other work streams. They'll use the information to develop guidance for U.S. producers, outlining parameters for fiber, acceptable coatings and technical testing protocols so that end markets know what to expect and how to better manage the flow of materials. A draft is expected in the first quarter of 2025 with a final report expected by summer. ■



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