

Future Opportunities for the Forest Industry in Iberia

Pöyry Forest Industry Seminar

Hosted by Pöyry Management Consulting, supported by Tecnicalpa

Thursday, 27 March 2014 at Hotel dos Templários
Avenida Doutor Cândido Madureira 1, 2304-909 Tomar, Portugal
Event Registration: www.tecnicalpa.com

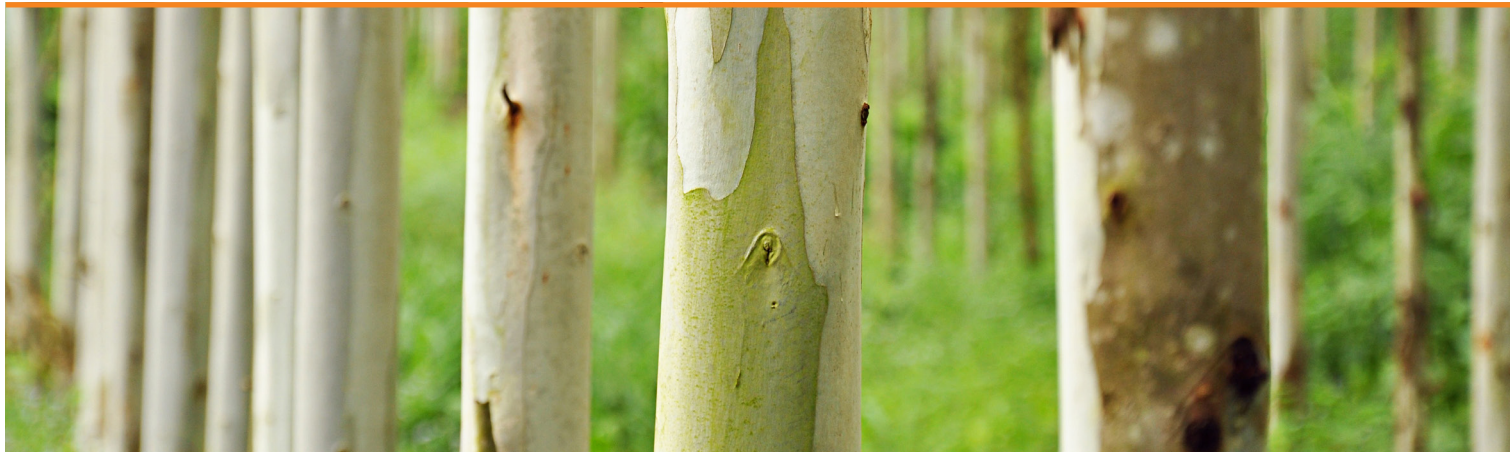
The global landscape for the forest-based industry is changing rapidly. Traditional industry sectors, such as Pulp, Paper and Wood Products need to adjust their strategies to cope with the challenging market environment. Shifting demand, increasing low-cost competition, rising costs and decreasing profitability are just a few of the challenges that the forest-based industry is facing. In addition to this, the Bioenergy sector resurgence has created additional stresses on an already tight wood and biomass market. As such, many business leaders are now asking:

- Who will win the fight for fibre?
- Is there biomass available for everybody?
- How and where to secure affordable wood and biomass?
- What sectors will thrive in the future?
- Is there hope for the paper industry?
- Is Bioenergy a threat or an opportunity for the industry?
- What drivers are shaping the landscape of the industry?

These are just a few of the key questions that Pöyry Management Consulting is helping its clients to address. In this seminar, Pöyry Management Consulting's experts from their Pulp, Paper, Wood Products, Bioenergy and Forestry practices will give their perspective on the opportunities and challenges that lie ahead, providing industry participants with a better understanding of their business environment and a sound basis for their future strategic planning.

Aimed at top and middle management in the forest-based industry, "Future Opportunities for the Forest Industry in Iberia" is a unique opportunity to hear Pöyry Management Consulting's leading experts share their views and insights.

Pöyry Management Consulting as part of Pöyry group has more than 250 sector specialised industry consultants located across the world and develops strategy projects across Europe, Russia, North America, Latin America and Asia-Pacific. We are the leading advisor of choice, providing services in: Corporate and business strategy, Investments, mergers & acquisitions and transactions, Market insight and modelling, Organisation and operational excellence, Sales and supply chain strategies and Technology and resource strategies.



Agenda

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9:00 – 9:45	Registration
9:45 – 10:00	Welcome and Expectations Gabriel Sousa Antonio Prates, Tecnicelpa
10:00 – 10:20	Pöyry Management Consulting sector overview Cormac O'Carroll
10:20 – 10:45	Pulp Market in Transition: Threats and Opportunities Petri Jokinen
10:45 – 11:10	Paper in a Mature Market, Recovered Paper in a Stressed Market: Implications for Iberia David Powlson
11:10 – 11:40	Break
11:40 – 12:05	Wood-Based Panels - Recovery or Stagnation? Tomi Hartikainen
12:05 – 12:30	The Global Pellet Market - Opportunities for Iberian Industry Players Hannes Lechner
12:30 – 12:55	Evolving Wood Supply Dynamics and Strategies in Iberia Marek Guizot
12:55 – 13:00	Wrap Up Gabriel Sousa Antonio Prates, Tecnicelpa
13:00 – 14:30	Lunch
14.30 – 17:00	Networking / Open discussions

www.poyry.co.uk

Profiles of Speakers and Panel Members



Cormac O' Carroll Director

Cormac has over 18 years of experience in corporate finance, bioenergy, forestry, and wood products. He is Director of the London office of Pöyry Management Consulting as well as leading the global wood products practice. Before joining Pöyry, Dr O'Carroll worked for the Jefferson Smurfit Group. He holds a BSc(For) and PhD from University College Dublin.



Petri Jokinen Principal

Petri holds a Master degree in Science from Helsinki University of Technology where he studied pulping technology and industrial economics. He joined Pöyry in Helsinki in 2000. His focus areas are pulp, paper, packaging and hygiene. Through the assignments and public appearances he has created a large network of connections and very strong subject matter expertise in all aspects of the pulp business. Petri has a strong project management track record in corporate strategy, operational excellence, due diligence, feasibility studies and M&A.



David Powlson Senior Principal

David has significant skills in project management, and particular experience in managing large and complex projects. He has managed and supervised numerous strategic assessments, due diligences and investment assessments amongst others. David has over 15 year experience in the pulp, paper and recycling sectors having previously worked for UK Government as its sector specialist, and prior to that he was a production manager in a large papermill. David has a degree in Paper Science with Management from the University of Manchester, and also undertook a year's research in paper at the Technical University of Dresden. He manages Pöyry's consultancy work in Pulp, Paper and Recycling from its London office.



Tomi Hartikainen Senior Consultant

Tomi has been working within forest industries for more than 10 years. His focus area is within wood products and related upstream and downstream value chain businesses and his expertise is on strategy, markets/competition and modelling/forecasting. Previously Tomi was employed by Walki Group and UPM-Kymmene Group.



Hannes Lechner Senior Principal

Hannes has more than 10 years of experience in the international bioenergy sector. In a large number of management consulting projects he focused on all relevant aspects of biomass supply chains for small to large scale bioenergy projects. His expertise covers all major steps of local and global biomass value chains, such as biomass resource assessment, harvesting, transport and processing, port infrastructure, white and black pellet technology, biomass market dynamics, biomass price scenarios, off-take market analysis and renewable energy policy mechanisms. Hannes is a member of Pöyry's Global BioFutures Practice and he holds an MSc in Forestry and a PhD in Biomass Sourcing and Supply Chain Management.



Marek Guizot Principal

Marek has a B.Sc. Forestry from the University of Stellenbosch in South Africa. Prior to joining Pöyry in 2007 he worked for Mondi Business Paper SA, and played a key role in the management and planning of Mondi's 375,000 ha of forest land. He has considerable experience of plantation forestry in Europe, Africa and Latin America. His area of expertise lies within resource appraisal, forest investment, bioenergy, wood procurement strategy, market research and economic analysis of wood products.



Gabriel Sousa Consultant

More than 10 years of experience on Pulp and Paper Industry. Gabriel is currently part of Pöyry Management Consulting team in London, where he supports and develops several practice areas, namely Pulp and Paper, Operational Excellence, Bioenergy and BioFutures. Before joining Pöyry, Gabriel worked for PortucelSoporcel group. Gabriel has a Chemical Engineering degree with Pulp and Paper Science post-graduation. He also holds an MBA from Porto Business School.

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REGISTRATION FEES (€)

Tecnicelpa Individual member*: 15,00

Tecnicelpa Collective member*: 15,00 (maximum of 2 registrations at members rate)

IPE / ABTCP member: 15,00

Non member: 30,00

* Membership fees duly settled, registered by 2013-12-31

DEADLINES

17th March: After this date, no refund shall be made in the case of absence for reasons not attributable to the Organisation

24th March: Deadline for registration

CONTACTS

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