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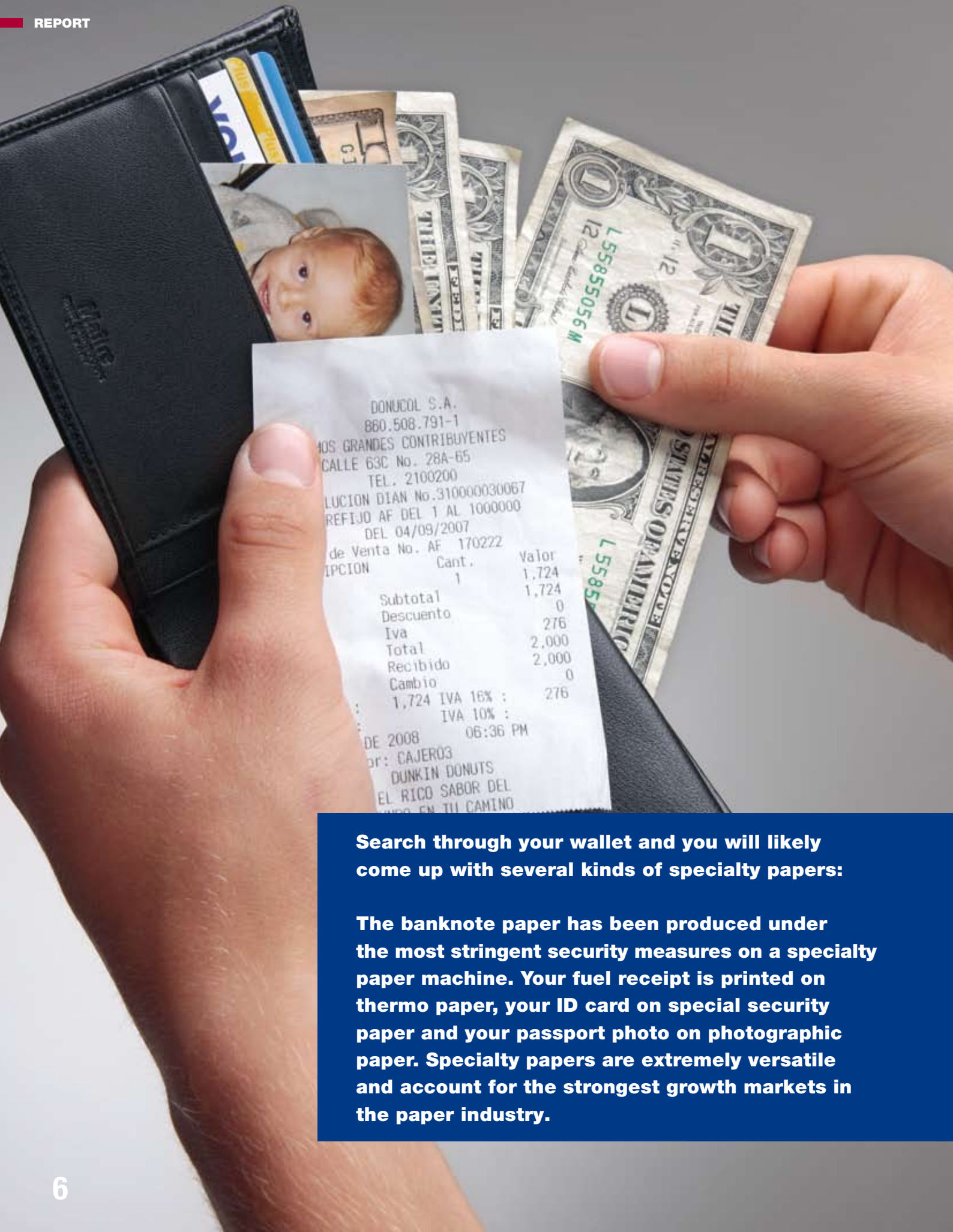
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# Specialty papers – an expanding market worldwide





**Search through your wallet and you will likely come up with several kinds of specialty papers:**

**The banknote paper has been produced under the most stringent security measures on a specialty paper machine. Your fuel receipt is printed on thermo paper, your ID card on special security paper and your passport photo on photographic paper. Specialty papers are extremely versatile and account for the strongest growth markets in the paper industry.**

Paper machines not only produce mass paper, they also make paper for tea bags and gasoline filters, banknotes and bottle labels, wallpaper and décor coverings for furniture, and backing paper for vinyl wallpapers.

There are about 2,900 types of specialty paper worldwide that can be subdivided into nine segments depending on application and market sector. For example, as label and release papers have the same field of application they belong to the same segment, although the manufacturing process and quality criteria are different.

Other segments are décor paper and overlay, wet laid nonwovens and filter papers, photographic and digital imaging paper, non-carbon paper, thermo paper, security paper and paper for cigarettes. Lightweight, thin printing papers and MG paper belong to the ninth segment, miscellaneous paper types.

**Good growth prospect**

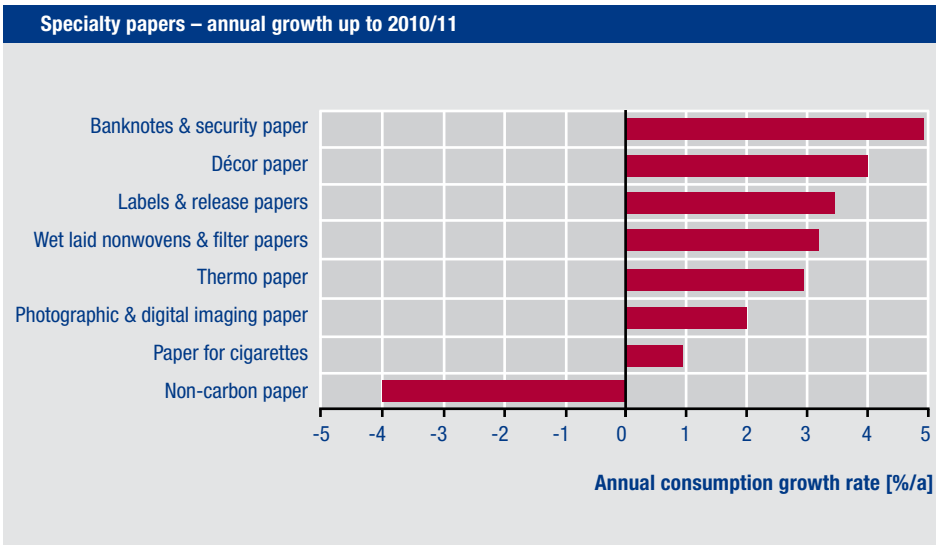
Every year more than 19 million metric tons of specialty papers are used – and this figure is likely to increase. For security papers the annual growth in consumption is almost five percent. The demand for established specialty papers is growing steadily, and the development of new varieties is running in high gear. One current research project, for example, is investigating papers for intelligent product labeling. This kind of marking could be used on supermarket shelves, for example, to show how fresh the meat in the packaging actually is. In up-and-coming economic regions the demand for filter papers is increasing, which explains why there is above average growth forecast for this segment, as well.

The group with the highest consumption is label and release papers at approximately three million metric tons worldwide. Almost all specialty paper segments exhibit positive growth



Checkout receipts are printed on thermo paper.

With the exception of non-carbon paper, specialty papers exhibit excellent growth potential.





*Memories on paper:  
Worldwide consumption of  
photographic and digital imaging  
paper is around 1.3 million tons  
per annum.*

rates. Only non-carbon papers show a downturn, although they currently represent the second largest segment. Every year a million metric tons each of thermo paper and photographic and digital imaging paper are produced. Wet laid non-wovens and filter papers total a hefty 1.5 million tons worldwide. Around 750,000 tons each of cigarette paper and décor paper are consumed. Banknotes, commercial and security papers account for almost 200,000 tons per annum. The remaining con-

sumption is in the ninth segment, of miscellaneous specialty papers.

The fact that the specialty paper segment accounts for only a total of five percent of total global paper consumption might lead to the view that these paper types are unappealing in business terms. However, compared with conventional papers, the specialty papers have a higher added-value with equivalent price level: Specialty papers account for 10 percent of the revenue from paper sales.

**Cost efficiency in small batches**

The peculiarities of specialty papers mean that the paper production machines have to meet stringent requirements. Generally, specialty papers are produced on narrow paper machines to minimize the change-over times and broke when switching to different grades of paper.

It is perfectly possible to have production batches of only one metric ton. For example, there are more paper machines producing securities than production plants for thermo papers, as the thermo papers are produced on wider, quicker paper machines due to their larger production batches.

By the way, the majority of the approximately 600 specialty paper machines worldwide produce paper for cigarettes. This is due to the historical market structure of this paper

segment, as well as these machines' versatility to also produce low basis weight printing papers – such as thin paper for bibles.

Voith Paper has specialized not only in paper machines for mass papers but also in the manufacture of specialty papers. Voith is active in all segments. Research and development in specialty papers is being pushed ahead in our research centers in Heidenheim, Düren and Ravensburg.

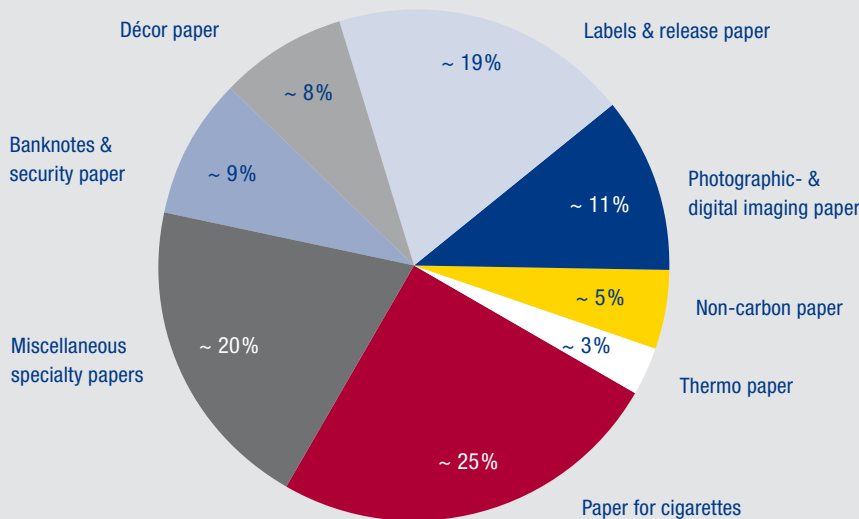
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Distribution of specialty papers according to number of paper machines (total around 600)



Tea bag paper is manufactured using the wet laid nonwoven process.