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The current challenge facing the European pulp and paper industry is how to materialize the transformation to a bio-economy, as well as to realize the necessary new green innovations. The risks, costs and constraints of doing business will increase, thereby further intensifying competition, but at the same time new business opportunities will open up. This study adopts a three-round dissensus-based Delphi approach in order to explore our key research question of how the pulp and paper industry may change strategically, and what is the potential for value creation in the year 2030. According to our expert panel, the main drivers of competitiveness in 2030 will include energy and material efficiency, sustainability, as well as new innovations in products to serve customer needs better. According to the projected 2030 scenario, the pulp and paper industry will produce more diversified products, focus on higher value-added, and aim at consumer segments with higher environmental awareness. On average, 40 percent of the turnover will according to the panel come from genuinely new products. Strategic cross-sectorial partnerships will have a key role in making this big leap, while simultaneously acknowledging the changing needs of sustainability-conscious customers and other stakeholders.

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