



How to connect with the

# Swedish Pulp, Paper, and Packaging Ecosystem

- National strengths, key players, innovation environments & supporting organisations

May 2026

In collaboration with:





# Sweden is a cornerstone of Europe’s pulp, paper & packaging value chain – providing a globally competitive and innovation-ready industrial base

## Key industry growth drivers in Europe



Policy-driven demand for fibre-based solutions

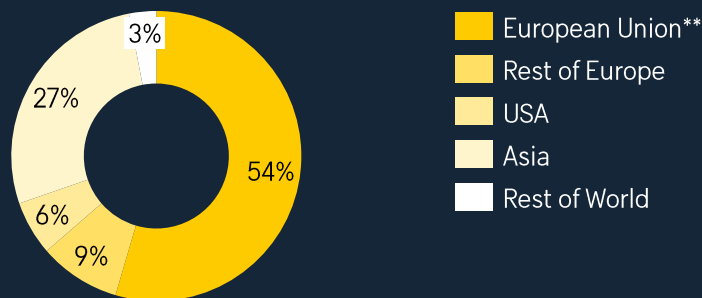


Need for scalable, low-carbon industrial capacity



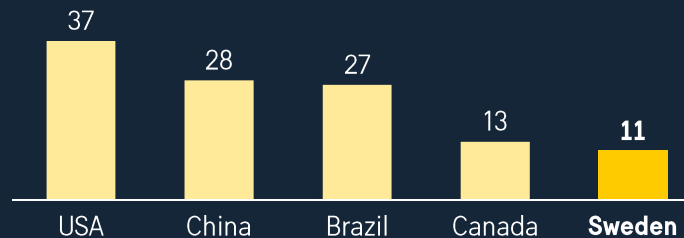
Focus on resilience and proximity

## Swedish pulp production export destinations 2025, percentage

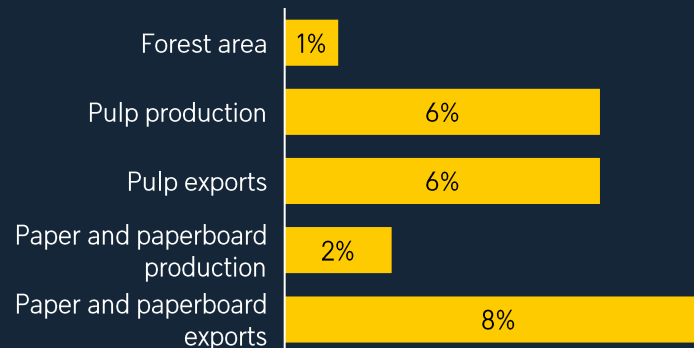


## Sweden is a top-5 producer – outperforming its country size on the global stage

### Global pulp production export distribution 2024, million metric tons



## Sweden’s share of global... 2023, percentage

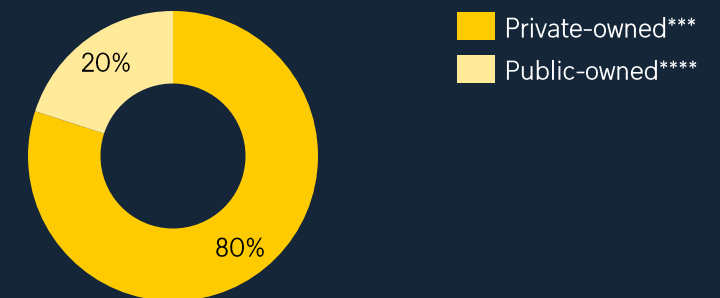


## Sweden has a longstanding P&P tradition with strong partners\*

Strong research institutes with bioeconomy focus



## Industry anchors with mixed forest ownership structure



\*Non-exhaustive. \*\*of which 24% remains in the Swedish pulp, paper, and packaging value chain. \*\*\*Common forests, special forests, owned by the Church of Sweden. \*\*\*\*State agencies, state funds, regions, municipalities, counties, foundations, funds. Source: Swedish Forest Industries, International Institute for Management Development, Eurostat, Swedish Board of Postal and Telecommunications, International Energy Agency, Swedish Higher Education Authority, Statista, FAOSTAT



# Sweden's pulp, paper and packaging ecosystem combines legacy strength with proven industrial concepts, creating a stable and scalable platform for new business models



## Strong legacy of **cross-stakeholder and international collaboration**

Formalised national bioeconomy strategy

Integrated triple helix collaboration

90% pulp, paper & packaging exported



## Proven concepts of **fossil free and circular production practices**

96% fossil free forest industry processes

72% share of recycled paper packaging

400 mn seedlings planted annually



## Top rankings in **R&D spending, innovation and ease of doing business**

#2 in Global Innovation Index

3,6% R&D Spending relative to GDP

#6 in Corruption Perception Index



## Home to world class **competent and effective workforce**

One forestry job creates three more

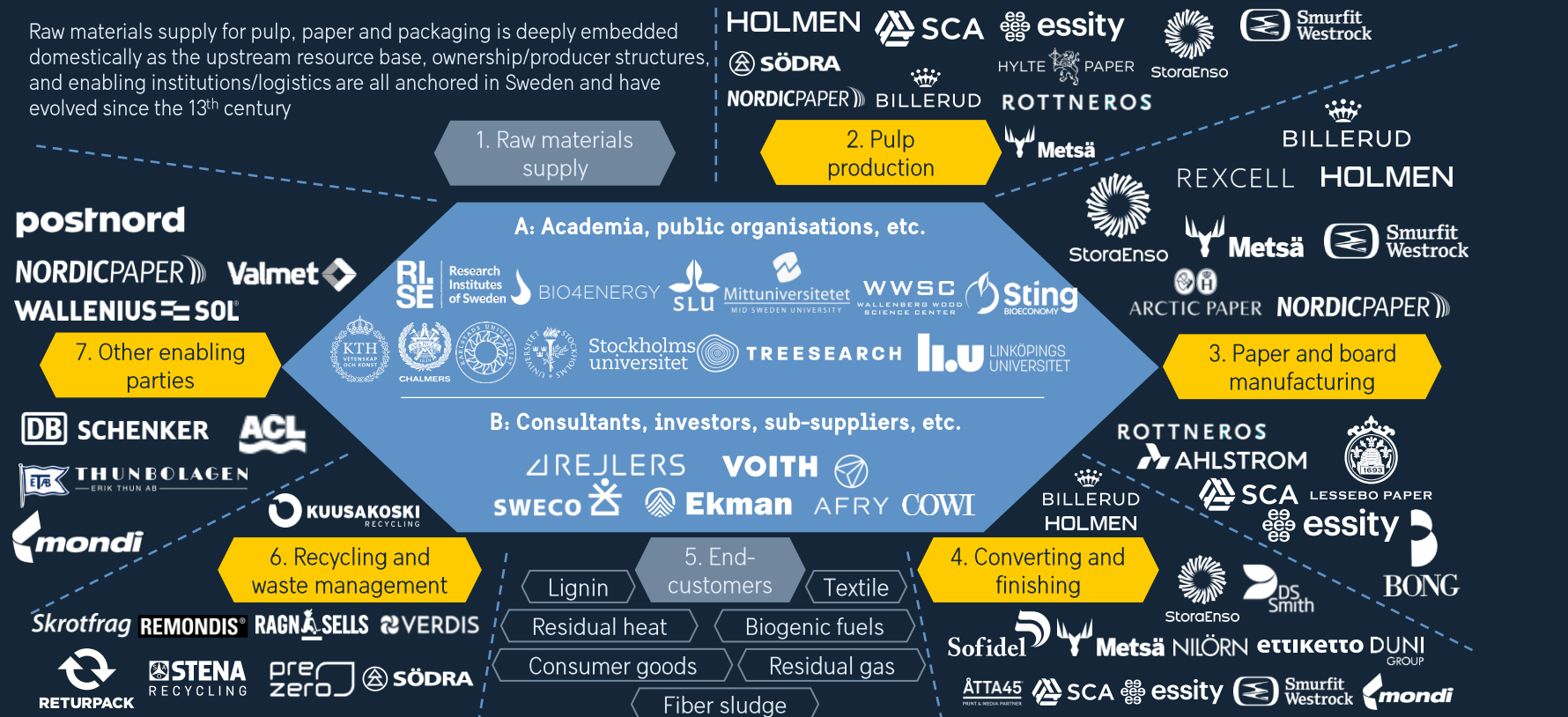
#6 in Value-add per EU production worker

#6 World Talent Ranking 2025



# An integrated end-to-end value chain – from raw materials to recycling and side-streams – connects global industry leaders with a new generation of innovative startups

Raw materials supply for pulp, paper and packaging is deeply embedded domestically as the upstream resource base, ownership/producer structures, and enabling institutions/logistics are all anchored in Sweden and have evolved since the 13<sup>th</sup> century



## Definitions

1. Logging, collection, and sorting
  2. Mechanical pulping, chemical pulping, and recycled pulping
  3. Paper forming, pressing, drying, and finishing
  4. Cutting, coating, laminating, embossing, and printing
  5. Consumers, industry, publishers, and packaging firms
  6. Collection of used paper products, sorting, and reprocessing into recycled pulp
  7. Transportation, storage, and other
- A.** Academia, public organisations, networks, investors, etc.
- B.** Consultants, investors, sub-suppliers, etc.

**Note:** Illustrative, non-exhaustive. Raw materials: logging, collection, and sorting; Pulp production: mechanical pulping, chemical pulping, and recycled pulping; Paper and board manufacturing: paper forming, pressing, drying, and finishing; Converting and finishing: cutting, coating, laminating, embossing, and printing; End-customers: consumers, industry, publishers, and packaging firms; Recycling and waste management: collection of used paper products, sorting, and reprocessing into recycled pulp; Other enabling parties: transportation, storage, machinery and other. Value Chain steps inspired by Food and Agriculture Organization of the United Nations (FAO) and United Nations Economic Commission for Europe (UNECE).

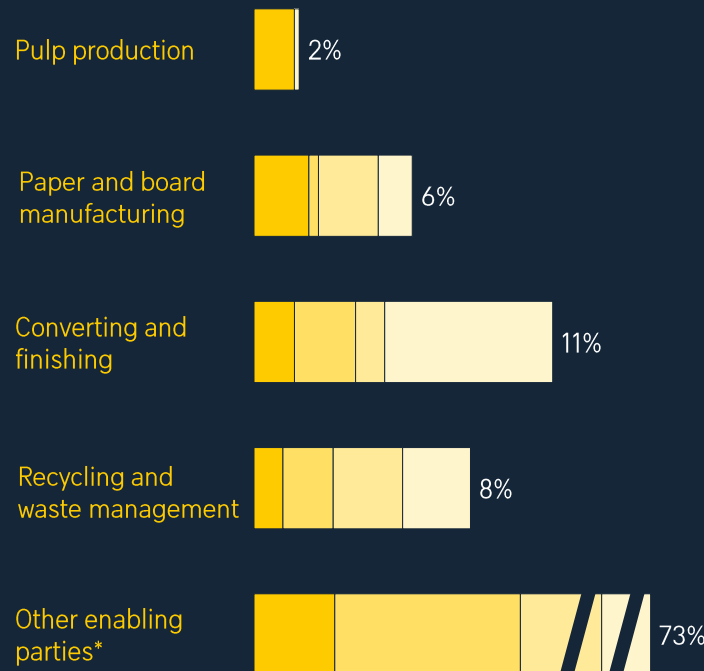


# A largely Swedish-owned ecosystem, supported by strong enabling actors, accelerates deployment, collaboration, & industrial scaling

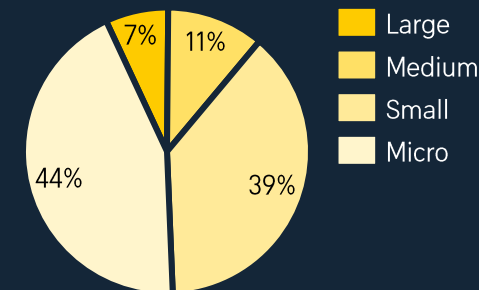
## Swedish pulp, paper, and packaging value chain – distribution and company size

Based on financial data of 1 723 companies

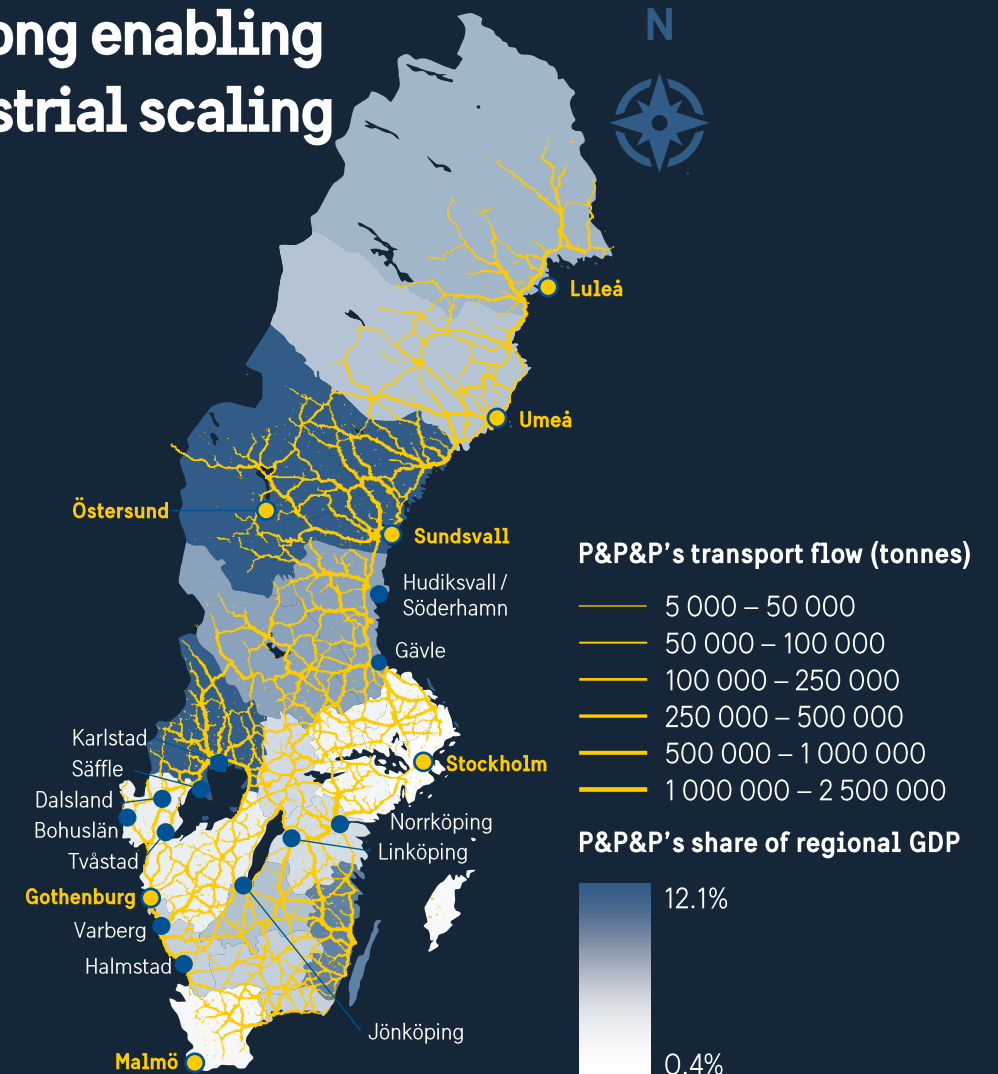
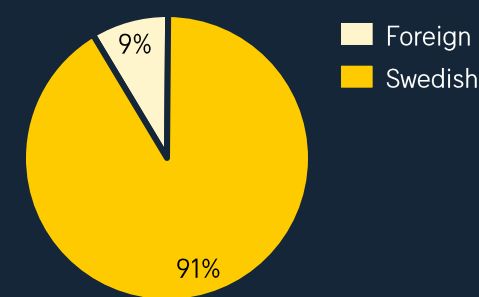
### Number of companies in each value chain step



### Size distribution in the entire value chain



### Company owner country



\*Other enabling parties include transportation, storage, and machinery providers, alongside broader innovation, talent, and ecosystem support actors including innovation hubs, clusters, networks, regional investment organisations, science parks, incubators, accelerators, academia, excellence / competence centres, research institutes, test/demo sites, talent support programs, consultants, investors, sub-suppliers. **Note:** Companies can be active in several value chain steps and regions – therefore, sum does not equal 100%. **Source:** Swedish Forest Industries, Orbis, Region Gävleborg, Business Region Värmland, Region Ostergötland, Business Region Väst, Invest in Halland, Skogforsk



# Capture value across Sweden's climate tech scale-ups, advanced materials innovation, and side-stream upgrading opportunities

## What Sweden offers



### Integrated industrial capability

Sweden combines governed forestry, deep process-industry experience, and shared industrial infrastructure to materially lower first-of-a-kind execution risk



### Secure raw materials flow enables durable, high-value assets

Policy-anchored, long-term access to carefully managed raw materials supports infrastructure-like assets focused on high-value applications



### Public risk-sharing lowers early capital exposure

A layered system of public de-risking supports early technical, scale-up and deployment risk

## Key opportunities identified



### Access to high-quality pipeline of scale-up companies

Direct exposure to Sweden's strong climate tech and bio-based innovation ecosystem, offering investors access to industrial-scale ventures with proven technologies and global relevance



### Market demand for barrier and functional material technologies

EU regulation drives market demand for bio-based barrier and functional materials, including barrier coatings and functional additives.



### Extended valorisation for residual streams

Need for technologies to upgrade lignin and other process streams into consistent, specification-grade inputs for material and chemical uses.



# Gävleborg combines industry leading producers, deep forest resources and a collaborative innovation ecosystem



## Strategic location

The gateway to the north with well-developed infrastructure



## Established industrial base

Home to major mills, converters and technology providers



## Access to quality raw material

Diversified and high-quality forestry and product base



## Collaborative local ecosystem

Public-, network-, and innovation-backed ecosystem



## Evidence of trade momentum

12.5 bSEK export value of pulp and paper with 1 bSEK YoY increase post-Covid-19

## KEY PLAYERS





# Gävleborg offers an established fibre production base with major mill anchors, port-driven export capacity and an active industrial cluster network

## Hudiksvall / Söderhamn

HOLMEN



## Gävle



movexum



### Arrival Support\*

Region Gävleborg

Gävle Municipality

Söderhamn Municipality

Movexum

Hälsingerådet

\*Organisations that aid companies, investors, or talent to establish in the region



# Värmland is home to producers and mills with a global footprint, as well as a deep bench of machinery, technology and specialty paper producers



### Large cap industrial mass

Concentration of large, established P&P actors



### Strong value-chain depth

Combines large mills with downstream packaging and fibre-based product players



### Coordinated ecosystem

Broad set of technical suppliers, engineering firms and OEM-linked capabilities



### Commercialisation infrastructure

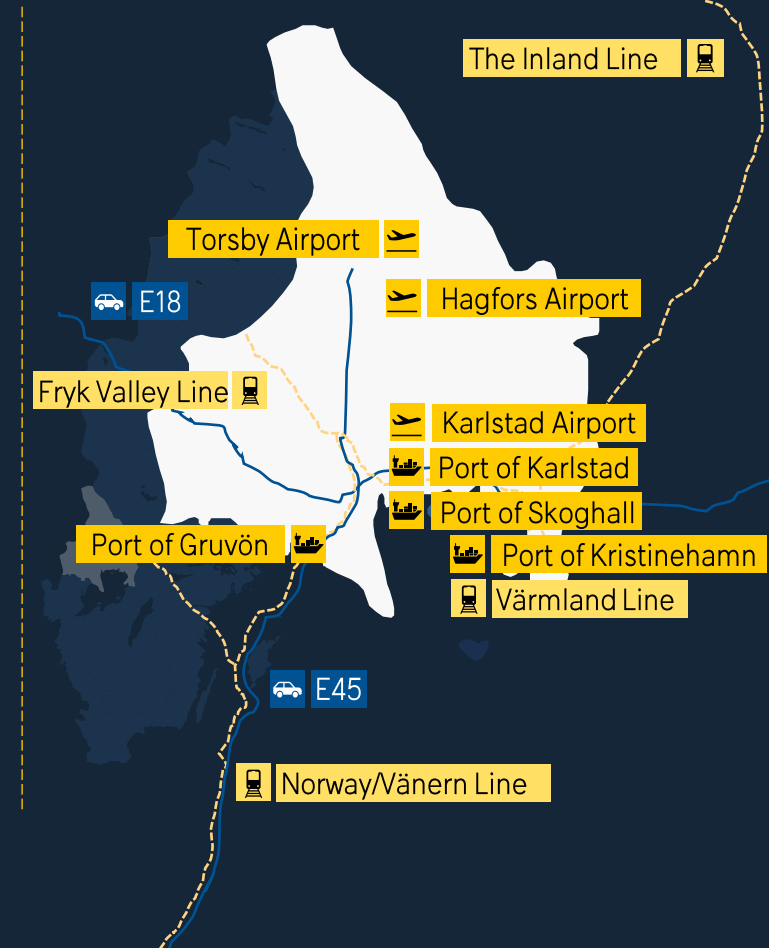
Testbeds lower barriers between idea, pilot and industrial application



### Regional bioeconomy alignment

Sustainable material is formally prioritised by the region

## KEY PLAYERS





# Värmland offers a full-depth value chain from forest to global brands to leading paper and packaging cluster

## Karlstad

NORDICPAPER Valmet BVT

pre zero VSV unite AFRY

biosorbe COWI IMI

technogarden TRITON VOITH

ÖBERGS REJLERS LitePac Transport Packaging

WIPAB BLUE OCEAN CLOSURES

LignoCity

RI SE Research Institutes of Sweden

PAPER PROVINCE

Sting BIOECONOMY

NORDICPAPER



## Säffle

BILLERUD WOOD TUBE SOMAS

CELLCOMB UMV BVT BTG

Arrival Support*
Business Region Värmland
Karlstadsregionen
STING Bioeconomy
Digital Well Ventures
Move to Värmland
Ny i Värmland

\*Organisations that aid companies, investors, or talent to establish in the region



# Business Region Väst bridges Värmland, Norway and Gothenburg's port whilst, holding capabilities to prototype, validate and scale solutions



**Multisite industrial base**  
Global assets spread across the entire region



**Outstanding logistics position**  
Proximity to Värmland, Norway, Gothenburg with access to sea, road, and rail



**Test, demo & development site**  
Dense innovation environments accelerate prototyping, validation, and industrial scaling



**Specialty paper & biomaterials**  
Connects raw material, mills, converting, materials science, circular experimentation

## KEY PLAYERS





# Business Region Väst offers specialty fibre production and recycling infrastructure, creating synergies for circularity development

## Dalsland



## Bohuslän



## Tvästad\*



grönaklustret

Innovatum science park

### Arrival Support\*\*

Business Region Väst

Innovatum Science Park

University West

\*Tvästad consists out of the cities Vänersborg and Trollhättan. \*\*Organisations that aid companies, investors, or talent to establish in the region



# Östergötland is a packaging centre combining paper and board production with materials research, innovative packaging and circular economy effort



## Packaging powerhouse

Dense converting cluster anchored by major board and paper producers



## Smart materials proficiency

Advanced materials, printed electronics, and smart packaging capabilities converge



## Circularity

Industrial symbiosis turns side streams into higher-value applications.



## Strong transport infrastructure

Port, rail, and road access support efficient flows

## KEY PLAYERS





# Linköping and Norrköping form a packaging ecosystem within Östergötland, spanning producers, converters, researchers, and innovation platforms

## Linköping



## Norrköping



Digital Cellulose Center



Arrival Support*
Region Östergötland
Switch to Sweden
Linköping Municipality
Norrköping Municipality
East Sweden Capital**

\*Organisations that aid companies, investors, or talent to establish in the region. \*\*Planned



# Halland is positioned on the doorstep of mainland Europe, combining industrial production and export-ready logistics, backed by regional commitment



**Large industrial base**  
World-scale industrial depth across core pulp and paper production



**Export-primed logistics**  
Globally connected through multimodal truck/rail/sea access



**Prioritised bioeconomy**  
Sustainable material is formally prioritised by the region



**Strategic location**  
Proximity to mainland Europe facilitates global scaling

## KEY PLAYERS





# Varberg and Halmstad together host a cross-sector actor base spanning fibre production, converting, logistics, and regional investment support

## Varberg & Kungsbacka



### Falkenberg



### Hylte



### Laholm



## Halmstad



### Arrival Support\*\*

- Invest in Halland
- City of Halmstad
- City of Varberg
- City of Kungsbacka
- City of Falkenberg
- City of Hylte
- City of Laholm



# Jönköping and the Coast of Norrland are important within packaging conversion and logistics as well as biorefinery and kraftliner

## Jönköping



**Strong packaging converting base**



**Central market access**  
80% of population within 350 km



**Industrial, forestry and innovation adjacency**

WAGGERYD CELL

High-quality BCTMP pulp for board applications

AHLSTROM

Specialty paper producer for technical applications

Metsä

Large cap tissue paper producer



StoraEnso

Global forestry industry giant



DS Smith

Global provider of industrial packaging solutions

NEFAB

SAVING RESOURCES

Global leader in fibre-based packaging solutions

JÖNKÖPING UNIVERSITY

Engineering, logistics and manufacturing university

SKOGSSTYRELSEN

National forestry authority headquarters



träcentrum

Development hub for wood-based manufacturing

## Coast of Norrland



**Biorefinery and fibre innovation corridor**



**Forest-to-port integration**



**Industrial-scale fibre base**

SCA

Leading producer of market pulp, kraftliner and paper

Metsä

Global producer of virgin fibre paperboard for packaging

mondi

World-leading producer of lignin

BILLERUD

Leading supplier of paperboard and packaging materials

ADITYA BIRLA Domsjö

World-leading producer of kraft paper

RI SE Research Institutes of Sweden

Institute for biorefinery, pulp, paper and fibre materials

StoraEnso

Global forestry industry giant

ARCTIC BUSINESS

Leading northern incubator for industrials and green tech

BIZMAKER

Innovation and scale-up support for forest industries

UMEÅ UNIVERSITET

Research in sustainable materials and bioeconomy





# Choose your investment pathway and scale with Sweden's support ecosystem

## INVESTMENT PATHWAYS

### Capital-led Investments

Capital return through scalable business models, intellectual property and growth potential.

**Best suited for**

Venture capital and industrial investors seeking innovation-driven growth.

### Acquisition & Joint Venture

Rapid access to the Swedish or Nordic market through an existing operational platform.

**Best suited for**

Established companies seeking speed to market and reduced initial execution risk.

### Talent-driven Capability Establishment

Access to specialised skills, engineering talent or industrial know-how not readily available in the home market.

**Best suited for**

Companies facing talent constraints or building long-term technical capabilities.

### R&D-driven Collaboration

Long-term technology development and innovation through collaboration.

**Best suited for**

Companies pursuing advanced R&D, new materials or next-generation industrial solutions.

## NATIONAL SUPPORT SYSTEMS

### Financiers



almi invest



Industrifonden

### Research

RI SE

WWSC  
WALLENBERG WOOD  
SCIENCE CENTER



### Start-up Support



### Invest and Export Support



almi



Regional  
investment  
organisations



# Identify your regional entry point for investment support in Sweden

## WHY INVEST IN SWEDEN



Grow your portfolio in a reputable ecosystem with access to finance, innovation hubs, and test sites



Collaborate with leading bioeconomy stakeholders across the value chain



Access a competitive and low-carbon industrial base

## REGIONAL CONTACT POINTS





Sweden

Sverige