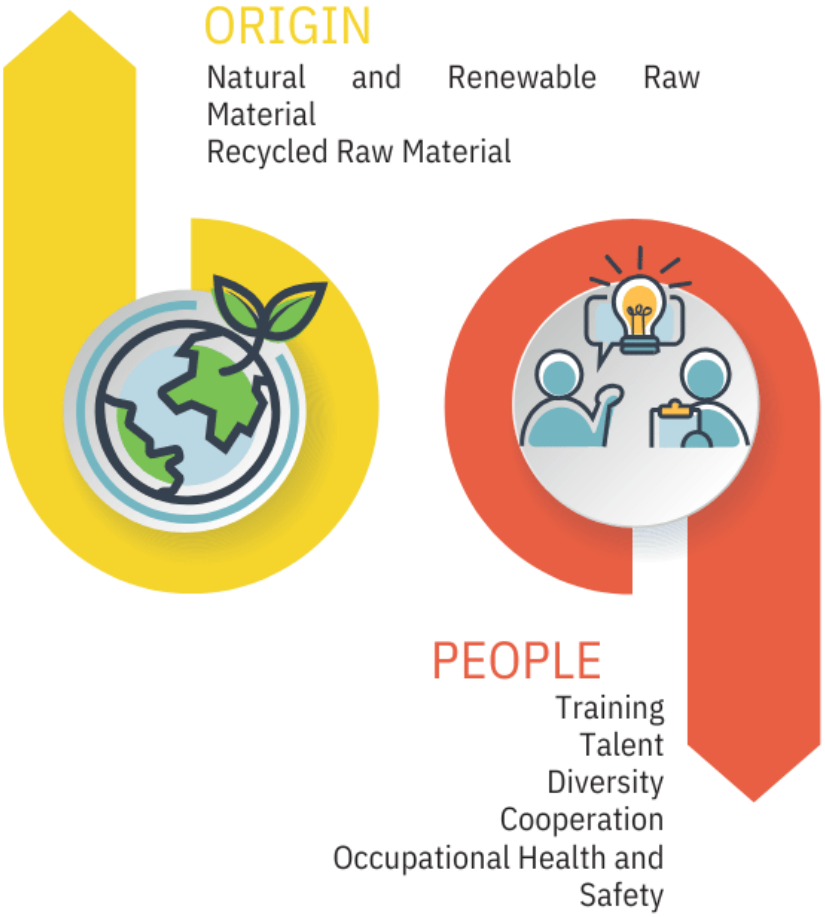
CLUSTERPAPEL

CLUSTERPAPEL
Asociación Cluster del Papel de Euskadi

PAPER INDUSTRY

NATURAL - RENEWABLE - RECYCLABLE - SUSTAINABLE - INNOVATIVE - CIRCULAR

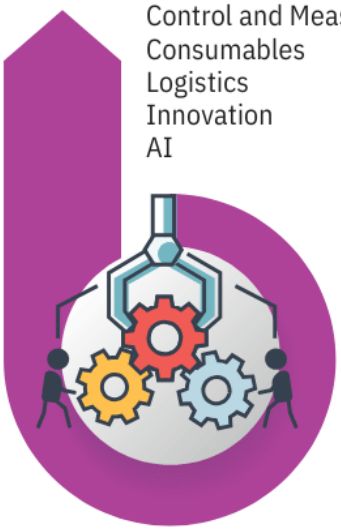


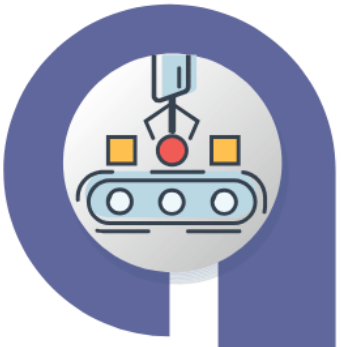
WWW.CLUSTERPAPEL.COM

Asociación Clúster del Papel de Euskadi. Portuetxe 23B, 3º, oficina 314. 20018 San Sebastián. 943 309 413. mail@clusterpapel.com

SUSTAINABLE PROCESSES

Forestry
Raw Materials
Engineering
Capital Equipment
Auxiliary Equipment
Control and Measuring Equipment
Consumables
Logistics
Innovation
AI





BIOPRODUCTS BIOMATERIALS

Pulp
Paper
Molded Products
Silicone-coated Products
Board
Handling Converting
Cutting and Die-cutting
Mandrels
New Uses for Paper
New Papers
Functional Papers

Follow us

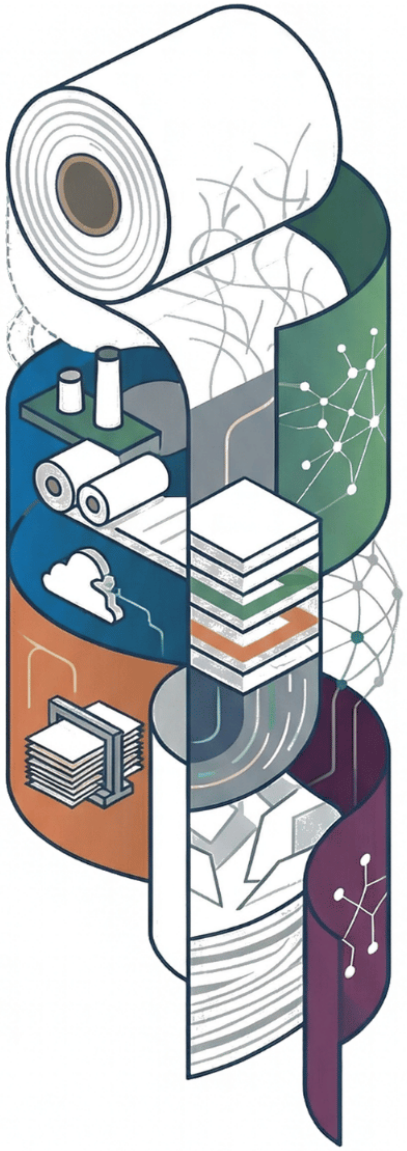
Radiography of the Basque Paper Cluster Association

INDUSTRIAL AGENTS

10
Manufacturers
Companies dedicated to pulp and paper manufacturing.

25
Sector Suppliers
Companies that supply specialized services and products to the sector.

9
Converters
Companies focused on paper converting and handling.



KNOWLEDGE AND INNOVATION

2
Training Centers
Organizations dedicated to talent development and sector-specific training.

2
R&D+i Centers
Centers specialized in research, development and technological innovation.

Forest(1)

SMURFIT WESTROCK CENTRAL FORESTAL, SAU

Manufacturing of pulp and/or paper (10)

CEMOSA - CELULOSAS MOLDEADAS DE ATXONDO, SA
COMINTER TISÚ, SL
LUCART TISSUE & SOAP, SLU
MUNKSJÖ TOLOSA, SAU
PAPEL ARALAR, SA
PAPELERA DEL ORIA, SA
PAPELERA GUIPUZCOANA DE ZICUÑAGA, SA
PAPRESA, SL
SMURFIT WESTROCK NERVIÓN, SA
ZUBIALDE, SA

Handling and/or processing of paper and/or cardboard (9)

CARTONAJES VAHL, SL
COREX CONVERTING SPAIN, SA
INDUSTRIAL BOROBIL, SA
ITASA – INDUSTRIAS DE TRANSFORMACIÓN DE ANDOAIN, SA
MANIPULADOS COMAYPA, SL
SA DE TALLERES DE MANIPULACIÓN DE PAPEL (SAM)
SINORCELL, SL
SOLIDUS SOLUTIONS MAYENSA, SL
TUBOPACK, SA

Sector-specific suppliers (23)

Capital goods, consumables, auxiliary equipment, engineering services, logistics, and raw materials

AFRY SOLUTIONS SPAIN, SAU
BASALAN CLUPAK, S.L.U
BELLMER IBERICA MACHINERY, SL
BRUNNSCHWEILER EUROPE AIR TECHNOLOGY, SL
CALDERERÍA Y MONTAJES ULINOX, SL
CLEAN WATER TECHNOLOGY, S.L. (CWT)
COMERCIAL AIZPURUA, SL
DAUKAT, SL
EUROKARPA, S.L
IDM TEST, SL
KLINGER SPAIN, SAU
LANTIER, SL
ORLOGA, SA
PORTECA – RIVATEC
PROGRESSIVE ENERGIE SERVICES SL (PESINT)
SYNERKOS TECHNICAL VALVE SOLUTIONS, SL
TECHLAB SYSTEMS, SL
TECNO CAUCHO ROLLS & COVERS
TORO Y BETOLAZA, SA
VACUUM SOLUTION IGASI, SL
VALMET TECHNOLOGIES, SA – AIR SYSTEMS SOLUTIONS
VEOLIA WATER TECHNOLOGIES
VOITH PAPER, SA

Technological development, artificial intelligence and software (1)

OPTIMITIVE, SLU

Training and technology centers (4)

CIFP Don Bosco LHII
CIFP Tolosaldea LHII
BC MATERIALS
FUNDACIÓN TECNALIA RESEARCH & INNOVATION



Mission

We drive the competitive transformation of the paper industry and its public image through cooperation, with a firm commitment to sustainability, digitalization, people, and innovation—all with the goal of creating shared value for the Basque Country (Euskadi).

Vision

To be a leading cluster organization that drives the transformation of the Basque paper industry's value chain, promoting a decarbonized, circular bioeconomy, innovation, and the creation of value for society.

Values

Open, Multi-stakeholder Collaboration: We believe that cooperation among individuals, companies, institutions, and knowledge centers is the foundation for collective progress.

Innovation, Continuous Improvement, and Achievement Orientation: We foster initiative, creativity, and constant technological transformation. In an environment of perpetual change, we cultivate an innovative culture—one focused on striving for excellence—that strengthens the sector's (and the Cluster's own) capacity to adapt, anticipate challenges, and move forward with determination, delivering valuable solutions and contributing to sustained competitiveness.

Sustainability: We work toward a decarbonized sector that is resource-efficient and aligned with a circular bioeconomy. We view sustainability as an opportunity for innovation and responsible leadership; consequently, our actions are aligned with international agendas and ecological transition goals.

People and Talent: We place people at the heart of the sector's transformation. We are committed to talent development, generational diversity, and collaboration with the educational system to ensure generational renewal and ongoing innovation.

Transparency and Ethical Commitment: We act with integrity, responsibility, and openness. We foster a culture of trust and accountability that strengthens the sector's positive image within society.

AN OPEN AND INCLUSIVE ASSOCIATION

Role of the Association

This is not a typical industry association focused primarily on defending the interests of its members.
While it does carry out such tasks, the Association's main goal is to enhance the competitiveness of its member companies through cooperation.
To this end, it focuses on areas including: training, advanced management, internationalization, advanced manufacturing, the environment, human resources management, innovation, and technology.

Why cooperation?

- "Cooperate and compete" is the motto of many large companies worldwide.
- It enables the pursuit of competitive advantages beyond those provided by traditional factors of production.
- Carrying out activities collectively rather than individually helps reduce costs.
- It is well-established that the exchange of ideas and communication are powerful drivers for creating added value.
- It allows for the benefits of large organizations to be realized without sacrificing the flexibility and responsiveness of smaller ones.
- It facilitates benchmarking and learning from other companies.

An association open to new members from across the paper industry's value chain.

- A larger membership base increases the potential to identify and leverage synergies.
- It becomes easier to develop collaborative initiatives.
- It facilitates the achievement of the Association's ultimate objectives.
- It enhances the Association's standing and representativeness with third parties.
- It strengthens the Association's finances, enabling the pursuit of new activities.



WHAT WE OFFER?

Strengthening Cooperation

Cooperating and competing is the motto of many large companies worldwide. Collaboration between companies allows them to develop certain activities jointly, optimize resources, and advance in the search for new competitive advantages beyond traditional factors.

Likewise, the exchange of ideas and communication between organizations act as a significant driver of value creation. These dynamics encourage comparison and learning among companies, allowing them to leverage the advantages of large organizations without losing the flexibility and adaptability inherent of smaller ones.

Strengthening the Value Chain

Becoming part of the Paper Cluster Association means integrating into the value chain of the Basque Country's paper sector, in an environment that is open to new members and focused on collaboration. This shared space facilitates meetings between clients and suppliers, fosters relationships, and improves communication between companies, thus strengthening the sector's cohesion.

Furthermore, the cluster increases the visibility and positioning of its member entities, enabling direct dialogue between different types of companies and continuous contact between industry professionals through its working groups. It also offers the opportunity to participate in collaborative projects driven by the Association itself or to leverage its structure to develop new initiatives.

All of this, along with access to up-to-date industry information, contributes to strengthening the image and competitiveness of the paper industry in the Basque Country.

Strengthening the Industry's Image

Being part of the Cluster helps project an image of a strong, dynamic sector that generates added value. Through collaborative work, the true potential of the paper industry and its capacity to generate wealth and economic development are recognized.

It also allows for highlighting the value of paper and the many products that use it as a raw material, as well as all the activities that revolve around it. Similarly, it helps to demystify the sector in relation to its environmental impact, conveying a more rigorous and current view of its commitment to sustainability, circularity and decarbonization.

Strengthening Institutional Relations

The cluster policy, promoted and supported by the Department of Industry, Energy Transition and Sustainability, provides a stable framework for collaboration between the sector and the Administration. In this context, we act as an active partner, sharing information and specialized knowledge that allows the various local, regional, and Basque administrations to gain a deeper understanding of the realities, needs, and challenges of the paper industry.

At the same time, this structured dialogue offers companies a direct and effective channel of communication with institutions and the various departments of the Basque Government, enhancing the sector's ability to advocate for its interests in a coordinated manner.

Strengthening People Training

The Cluster environment allows participants to learn how other organizations manage their teams and explore new approaches to talent management. Collaborative work on people development, along with specific activities in the area of Occupational Risk Prevention, contributes to improving competitiveness and organizational performance.

The Cluster also allows for a joint analysis of the sector's training needs and the search for tailored solutions, going beyond what is currently available on the market. Furthermore, it facilitates the identification and preparation of knowledge transfer within organizations, helping to preserve and enhance the sector's technical and strategic expertise.

Strengthening Management

Membership in the Cluster promotes the development of advanced management systems, fostering a culture of continuous improvement. The exchange of experiences and learning through benchmarking in areas such as People, Occupational Risk Prevention, and the Environment, for example, allows for the incorporation of best practices and raises the management level of member companies.

In addition to working towards the integration of advanced management, the Sustainable Development Goals, and ESG criteria.

Strengthening Advanced Manufacturing

Working together within the Cluster facilitates the identification of new opportunities for improvement in key areas such as maintenance and production. Furthermore, it promotes the development of capabilities linked to Industry 4.0 and AI in a cyber-secure environment, fostering the modernization and competitiveness of companies in the sector.

Strengthening environmental sustainability

The Cluster maintains an active relationship with the Deputy Ministry of the Environment, IHOBE, and URA, promoting collaborative work to minimize environmental impacts while ensuring business competitiveness. It also allows for a more secure and proactive approach to new environmental legislation.

COOPERATIVE ACTIVITIES 2026

Sector Information and Representation

4 Market Reports
Sector Sustainability Report
Annual Statistics
Basque Paper Directory
42 Representation Activities
18 Alliances







International Markets

41% Exports





Advanced Management

5 Working Groups,
1 Sustainability Policy,













People Management

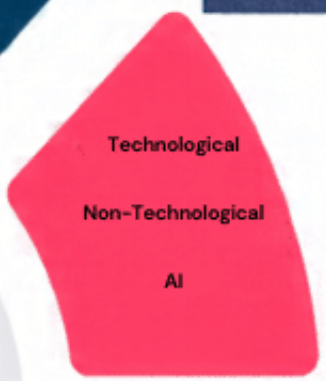
4 Working Groups
2 Benchmarking
1 publication 'I choose to be a paper maker'



Governance



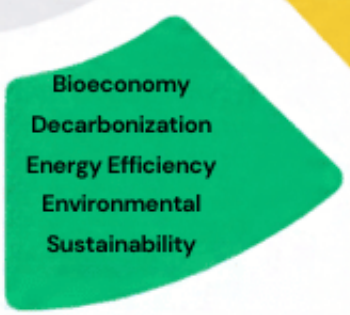
4 Board Meetings
1 Ordinary General Assembly, 1 Extraordinary General Assembly
41 Cooperation Activities
4 Strategic Plan Working Groups



Industry 4.0

11 Technical Sessions
2 Maintenance Working Groups





Decarbonized Circular Bioeconomy

7 Working Groups
1 Benchmarking



EUSKO JAURLARITZA
GOBIERNO VASCO

INDUSTRIA, TRANTSIZIO ENERGETIKO ETA JASANGARRITASUN SAILA

DEPARTAMENTO DE INDUSTRIA, TRANSICIÓN ENERGÉTICA Y SOSTENIBILIDAD