



World Paper Markets up to 2030

Paper market insights through 2030

Since the early 1980s, Pöyry has published global, long-term paper market forecasts regularly. Our new outlook is the 11th in this series of major studies, to be published in October/November 2014. The study provides an invaluable strategic platform and essential information for all business participants throughout the paper and paperboard value chains, including pulp and paper companies, suppliers of machinery, equipment, chemicals and related inputs, investors, financiers, institutions, paper merchants and traders, logistics companies and other interest groups.

The world paper industry is currently facing far-reaching structural changes due to the digitalization of society and businesses, the globalization of industries and the consequent re-distribution of wealth across the globe. A new, more competitive business environment is taking shape, ending the dominance of traditional Western markets and giving rise to new, dynamic playing fields for the world's paper, tissue and packaging board industry. The new Pöyry Insight study, "World Paper Markets up to 2030" aims to cast light on various geographic, market and competition factors that are instrumental in determining the

strategic orientation of paper industry firms all over the world.

The last five to six years have been extremely challenging for the world's paper industry, particularly to those operating mainly in the Western markets. Paper consumption in developed markets has been declining, while in emerging market areas demand growth is matched by the growth of the macro environment. End-use prospects differ widely, as some uses of paper are dying or slowing while some uses or product areas are stable, or have performed extremely well.

ESSENTIAL ISSUES:

- Economic development, medium to long term
- Impact of ICT on graphic paper demand
- Future of paper-based media and publishing; future forms of advertising
- Packaging drivers – substitution, sustainability, migration etc.
- Paper industry structure – trends and dynamics
- Geographic distribution of supply
- Global trade flows by main product area



For over a decade now, digital media have been replacing graphic papers, either directly or indirectly, through changing consumer habits and people's ways of spending spare time. The popularity of online media coupled with new business practices, including paperless banking and invoicing, create uncertainty for the graphic paper industry's future. At the same time, sustainable packaging is becoming an increasingly important factor in eCommerce and other marketplaces, thus creating new opportunities for fiber-based, recyclable and biodegradable packaging materials. The Pöyry Insight study will help understand the likely impacts of these developments on market demand.

The globalization of industries, driven by cost pressures in the West and Japan, has led to increasing purchasing power of people living in the emerging market regions, and to booming demand for paper and packaging materials in the new

CONTENTS

Analysis and synthesis

- Driving forces of the paper industry
- Demand trends through 2030
- End uses
- Production trends & growth
- Trade flows & net trade
- Paper industry structure – key players, industry concentration, pricing power
- Price development

Product areas

- Graphic papers
 - Newsprint
 - Uncoated mechanical p/w paper
 - Coated mechanical p/w paper
 - Uncoated woodfree p/w paper
 - Coated woodfree p/w paper
- Tissue paper
- Containerboards
- Cartonboards
- Sack paper
- Other paper & paperboard

Geographic coverage

- Global, by region and main country
- About 80 countries or country groups

Deliverables

- Executive report
- Statistical annexes
- Memory stick enclosed with the printed report



manufacturing locations. In fact, practically 100% of the growth of global paper demand in the last 15 years has been driven by Asia (excl. Japan), which now accounts for a good 40% of the global paper and paperboard demand. Increasing population, urbanization and the development of a new middle class all contribute to the steadily rising demand for paper and paperboard products in emerging markets, where obsolete and uncompetitive mills are being replaced and investments focus on efficient, state-of-the-art assets. These new entries constitute a significant competitive counter-force to their Western rivals operating in international paper and paperboard markets.

The growth of the Asian market is putting an end to the dominance of traditional producers and giving rise to a new type of competition. However, medium-term prospects can be bleak, particularly for the second tier Asian producers, as high capital spending by the leading Chinese/Asia-Pacific

paper firms has led to striking over-capacity and declining fortunes for the sector as a whole.

The Pöyry Insight study “World Paper Markets up to 2030” addresses these and many other significant market issues that are of current strategic interest for the business participants. As in Pöyry’s previous global paper market studies, the scope is inherently global, providing demand forecasts from 2013 through 2030 for ten product areas and

about 80 countries or country groups. The study contains descriptions of key drivers which are common across many product areas, or particularly relevant to specific paper grades. Each product area section presents condensed market insights in terms of end use trends, demand prospects, industry structure, production trends, trade flows and trade balances, to mention but a few. The forthcoming study also has new elements, such as boxed illustrations and case studies of selected topics in the industry.

BOXED ILLUSTRATIONS & CASE STUDIES:

- Structure of the graphic paper industry 2030
- Is China’s paper market running out of steam?
- Future of India in the global paper and paperboard market
- Coated woodfree paper in Europe – is there such a thing as “core demand”?
- Tissue challenge - shipping air?
- Global or local strategy?



Engineering balanced sustainability™

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