World Paper Markets up to 2030
Paper market outlook through 2030

Since the early-1980s, Pöyry has published global, long-term paper market forecasts regularly. Our new outlook is the 12th in this series of major studies, to be published in early December 2017. The study provides an invaluable strategic platform and essential information for all business participants throughout the paper industry cluster, 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 demand for paper and paperboard continues to grow, albeit at a slower pace than before. Global demand amounted to 408 million tons in 2016, up 0.9%/a on the previous year, and by an average 0.8%/a as from 2010. The fast growth of the rising markets has clearly overpowered the stagnating or declining demand in the West and Japan, although very recently, the counterforce of the emerging regions has just barely compensated for the decline in the mature markets. China has for long been the world’s powerhouse, accounting for nearly 80% of the global incremental demand since 2010, but now the situation is gradually changing as China’s growth is slowing down. Given China’s weight in the global paper and paperboard market (over 25% of global demand) any change in the country’s demand development can have significant effects on global growth. Heads are now turned towards other emerging markets as well as the mature ones – how is the expected recovery of the global economy going to impact demand for printing, packaging and hygiene in various geographic areas?

The economic outlook is now very different from the situation three years ago when our last update of the global paper market went out. The world seems to be finally getting out from the long recession with GDP growth accelerating in Europe, Japan, China and the USA, whilst the medium-term outlook in many parts of the world is still disappointing, and new political risks are rising. Resumed economic growth in the West is likely to inject into the export packaging sector in the East, giving a long-waited buzz for the Asia-Pacific packaging board industry. At the same time, the box-intensive food sector and strong performance of retail business have kept the western packaging board markets on the crest of a wave through 2016-2017. What is the growth outlook for packaging? What are the key demand drivers for packaging now and in the future? Is sustainability more important than cost?

Digitalization is fundamentally impacting the industry: digital transformation of society is posing a strong threat to graphic paper usage, but benefiting the packaging sector through new ways of trade. Online shopping is growing at double digits, and creating a welcome boost for the global packaging board industry. At the same time, the global graphic paper market is declining at 2-3%/a mainly due to substitution by digital technology. For example, e-invoicing is growing at about 20%/a in the west while

ESSENTIAL ISSUES:
• Demographic trends and economic development through 2030
• Product area–specific market drivers: media and publishing trends, role of advertising, product substitution, sustainability, light-weighting, etc.
• Paper industry structure – trends and dynamics
• Geographic distribution of supply
• Global trade flows by main product area
A major boost in the emerging markets is just about to come. What will be the impact of digital transformation of society on paper and paperboard demand in the upcoming 10-15 years? How is the turbulence in the graphic paper industry and resulting repurposing of paper machines going to change the market balances in the packaging board industry?

The paper industry is transforming – paper firms in emerging Asia are growing, while many of the largest North American, European and Japanese companies have reduced in size. Overall industry concentration has not changed much since the turn of the decade, but companies have become far more home-region oriented and thereby focused on their core strength areas. The packaging sector has remained attractive for private equity, which has kept the industry concentration relatively stable over the last 7-8 years. The fast growth of tissue segment has paved the way for new entries, slowing down industry concentration especially in emerging market regions.

The aim of the study is to address these issues and seek answers to many other futuristic questions – how is the paper and paperboard market going to look like by 2030? The new Pöyry Insight study, “World Paper Markets up to 2030” aims to cast light on the most recently emerged and foreseeable market and competition factors that are instrumental in determining the strategic orientation of paper industry firms all over the world.

With global scope, the study provides demand forecasts from 2016 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.

---

**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
- Packaging paper and paperboard
  - 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

---

**BOXED ILLUSTRATIONS & CASE STUDIES:**
- Declining market strategies in the graphic paper industry
- Grade conversions – escape from graphic paper to packaging and specialties impacting market balances
- ASEAN – India Free Trade Area: foreseeable competitive consequences in India’s paper industry
- Chinese cartonboard producers are entering the international arena
- Derived demand for papermaking chemicals/minerals
- E-commerce potential for the paper and packaging market
- EU directive for plastic bags – impact on paper carrier bags?
TO ORDER PLEASE COMPLETE AND RETURN THE BELOW.

☐ World Paper Markets up to 2030 (1 hard copy and pdf file)EUR 9 000 (excl. VAT)

☐ For the subscribers of the report, a separate presentation
and workshop (travel cost will be charged separately)
Quote on request

☐ additional printed copiesEUR 200

METHOD OF PAYMENT AND DELIVERY:

☐ Please invoice me.

Direct bank transfer:
Nordea Bank Finland Plc.
Satamaradankatu 5 B
FI-00020 Nordea Finland
Account name: Pöyry Management Consulting Oy
Account number: 166030-81839 (EUR)
Swift code: NDEAFIHH
IBAN: FI6916603000081839

An invoice will be issued on order, and the report dispatched on receipt of payment.

Name: ____________________________ Position: ____________________________

Company: ____________________________ Phone: ____________________________

Address: ____________________________ Fax: ____________________________

City: ____________________________ e-mail: ____________________________

Postal code: ____________________________ VAT No: ____________________________

Country: ____________________________ Signature: ____________________________

Return to:
Ms. Maria Ekroth
Tel: +358 10 33 49204
Fax: +358 10 33 21031
Email: maria.ekroth@poyry.com

Pöyry Management Consulting Oy
P.O.Box 4, Jaakonkatu 3
FI-01621 VANTAA, Finland