



# NA Specialty and Value Added Paper Market Study

Business Development Advisory — “Finding Growth in Mature Markets”

## Specialty Paper Grades and # of Sub Grades

### Packaging Papers

Coating base (9)  
Kraft specialties (20)  
Label face stock (9)  
Label release base (7)  
Laminating base (12)  
Lightweight packaging (11)  
Medical / hygienic (8)  
OGR treated (13)  
Security papers (1)  
Tissue pkg / wraps (21)  
Waxing base (8)

### Printing Papers

Art papers (6)  
Carbonless (1)  
Coating base (1)  
Direct thermal base (5)  
Latex saturating base (1)  
Lightweight printing (4)  
Photographic base (6)  
Premium cut size (3)  
Premium writing (6)  
Security papers (5)  
Text & cover (8)  
Wide format inkjet (5)

### Technical Papers

Asphalt saturating base (2)  
Décor paper (3)  
Electrical papers (7)  
Filter base stock (12)  
Industrial saturating base (9)  
Kraft specialties (2)  
Latex saturating base (11)  
Tissue packaging / wraps (1)  
Wallpaper base (3)

## Summary

BDA announces a new study of North American specialty and value added papers and markets. This major but fragmented market segment accounts for approximately 6.7 million tons annually and producer sales of about \$8.6 billion in 2010 in the NA market.

The in-depth study contains 187 pages of unique and insightful content including over 100 tables and charts. The study takes an in-depth look at individual grades, markets, and segments and breaks the market down into 27 major specialty paper grades, (see sidebar), over 220 specific applications, 11 application categories, 7 paper grade segments, 7 customer categories, 18 major paper making and 11 major converting processes by grade. In addition, the study estimates producer shares for each specialty grade, reviews historic and forecasted growth trends, and identifies major opportunities, threats, and likely developments across these segments.

The study uses 2010 as the base year and includes projections to 2015 as well as historical perspective going back to 2005.

## Analysis and Scope

Major trends and developments within these segments are analyzed in detail and conclusions and implications are identified for supply chain participants. The scope of the analysis includes the following:

- Demand and growth trends for numerous segments (2005, 2010, 2015)
- Demand drivers and reducers by segment
- Current / emerging technologies and market developments
- Major opportunities and threats by segment
- Estimated producer shares & trade balance by grade
- Major paper machine and converting processes employed including forecasts
- Price levels by grade and historical price trends
- Supply chain implications and conclusions.



## Study Charts and Tables

This study is highly quantitative with over 100 individual charts and tables breaking down specialty paper markets, grades, sub grades, applications, end use segments, customer groups, producers and production shares by grade, paper machine processes, and converting processes to facilitate a full understanding of these businesses and related dynamics.

Study Tables and Charts	
Figure 1 Specialty and Commodity Volumes and Growth Rates	Figure 51 NA Producers of Medical / Hygienic Papers
Figure 2 Demand and Growth Rates by Specialty Paper Grade	Figure 52 Waxing Base Paper Applications
Figure 3 Major Application Segments and % of Demand	Figure 53 NA Waxing Base Paper Producers
Figure 4 Specialty Paper Prices and Historical Trends	Figure 54 Specialty Printing Paper Demand and Growth Rates
Figure 5 Specialty Paper Machine Profiles by Region	Figure 55 Premium Business Paper Types
Figure 6 Special PM Processes That Define Specialty Papers	Figure 56 NA Producers of Premium Cutsized Papers
Figure 7 Mill Level Revenue and Average Prices by Market	Figure 57 NA Carbonless Paper Producers
Figure 8 Demand by Major Specialty Paper Market	Figure 58 Direct Thermal Base Paper Applications
Figure 9 Demand and Growth Trend by Major Paper Market	Figure 59 NA Producers of Direct Thermal Base
Figure 10 Specialty Paper Grades by Market Segment	Figure 60 Text & Cover Applications
Figure 11 Major Paper Grades Employed in Specialty Papers	Figure 61 NA Producers of Text & Cover Papers
Figure 12 Paper Grade Volume by Specialty Paper Grade	Figure 62 Security Paper Applications
Figure 13 North American Paper Grade Consumption	Figure 63 NA Producers of Security Papers
Figure 14 Specialty Grade % of Total Grade Category	Figure 64 Photographic Base Paper Applications
Figure 15 Demand by Major Product Application Segment	Figure 65 Lightweight Printing Paper Applications
Figure 16 Demand and Growth Trend by Application Segment	Figure 66 NA Producers of Lightweight Printing Papers
Figure 17 Major Specialty Paper End Use Markets	Figure 67 Art Paper Applications
Figure 18 Demand and Growth Trend by Paper End Use Market	Figure 68 NA Producers of Art Papers
Figure 19 Specialty Paper Machine Process Descriptions	Figure 69 Wide Format Inkjet Papers
Figure 20 Demand by Major PM Process Category	Figure 70 NA Producers of Wide Format Inkjet Papers
Figure 21 Specific PM Processes in 2010	Figure 71 Premium Writing Paper Applications
Figure 22 Demand and Growth Trend by PM Process Category	Figure 72 NA Producers of Premium Writing Papers
Figure 23 Demand and Growth by Primary PM Process	Figure 73 Technical Paper Grade Demand and Growth Rates
Figure 24 Special Converting Processes and Enhancements	Figure 74 Industrial Saturating Base Applications
Figure 25 Major Converting Processes for Specialty Papers	Figure 75 NA Producers of Industrial Saturating Base
Figure 26 Demand and Growth Trend by Converting Process	Figure 76 Filter Base Paper Applications
Figure 27 NA Producer Fragmentation by Grade	Figure 77 NA Producers of Filter Base Stock
Figure 28 Major Customer Groups for Specialty Papers	Figure 78 Asphalt Saturating Base Applications
Figure 29 Demand and Growth trend By Major Customer Type	Figure 79 NA Producers of Asphalt Saturating Base
Figure 30 Specialty Paper Grade Growth Rates	Figure 80 Latex Saturating Base Applications
Figure 31 Five Year Growth Tons by Specialty Paper Grade	Figure 81 NA Producers of Latex Saturating Base
Figure 32 Specialty Packaging Grade Demand & Growth Rates	Figure 82 Décor Paper Applications
Figure 33 Label Release Base Paper Types	Figure 83 NA Producers of Décor Papers
Figure 34 NA Label Release Base Producers	Figure 84 Wallpaper Base Paper Types
Figure 35 Label Facestock Segments	Figure 85 NA Producers of Wallpaper Base
Figure 36 NA Label Facestock Producers	Figure 86 Electrical Paper Applications
Figure 37 Laminated Paper Applications	Figure 87 NA Producers of Electrical Papers
Figure 38 NA Laminating Base Producers	Figure 88 Top 50 Specialty Paper Producers
Figure 39 OGR Treated Paper Applications	Figure 89 Specialty Paper Production by NA Region
Figure 40 Major Producers of OGR Treated Papers	Figure 90 Average Specialty PM Capacity by Region
Figure 41 Major Coating Base Applications	Figure 91 Specialty Packaging Paper Producers
Figure 42 NA Coating Base Producers	Figure 92 Specialty Printing Paper Producers
Figure 43 Major Kraft Specialty Applications	Figure 93 Specialty Technical Paper Producers
Figure 44 NA Producers of Kraft Specialties – Less Extensible	Figure 94 Estimated Average Prices at Producer Level
Figure 45 NA Producers of Extensible Kraft Paper	Figure 95 Historic Specialty Paper Price Trends
Figure 46 LWT Packaging Paper Applications	Figure 96 Highest Growth / Decline Grades
Figure 47 NA LWT Packaging Paper Producers	Figure 97 Specialty Paper Growth by Major Market
Figure 48 Tissue Packaging / Wraps	Figure 98 Specialty Paper Growth by End Use Application
Figure 49 NA Producers of Tissue Packaging / Wrap Papers	Figure 99 Specialty Paper Growth by Paper Machine Process
Figure 50 Medical / Hygienic Paper Applications	Figure 100 Growth in Specialty Paper Converting Processes

## Table of Contents

<b>1</b>	<b>Executive Summary</b>	<b>6</b>
<b>2</b>	<b>Introduction and Background</b>	<b>13</b>
	A. Specialty Paper Definition	13
	B. Study Scope	15
	B. Methodology	16
	C. BDA Qualifications	18
	D. Contingencies and Limiting Conditions	18
<b>3</b>	<b>Demand Overview and Segmentation</b>	<b>20</b>
	A. Market Tonnage and Sales Revenue	20
	B. Market Segments	21
	C. Paper Grade Segments	24
	D. Product Application Segments	30
	F. End Use Markets	32
	G. Paper Machine Processes	34
	G. Converting Processes	38
	H. Supply Base	41
	Customer Groups	43
<b>4</b>	<b>Specialty Grade Review</b>	<b>46</b>
	A. Specialty Paper Grade Summary	46
	B. Packaging Paper Grades (1-10)	48
	C. Printing Papers (11-20)	90
	D. Technical Papers (21-27)	125
<b>5</b>	<b>Supply Base</b>	<b>148</b>
<b>6</b>	<b>Outlook</b>	<b>158</b>
	A. NA Specialty Paper Segment	163
	B. Paper Grades	165
	C. Specialty Market Segments	166
	D. End Use Applications	167
	E. Technology / Process Changes	169
	F. Paper Grade / Process Development	170
	G. Converting Processes / Treatments	172
	H. Pricing / Costs	174
	I. Opportunities	176
	J. Major Threats	180
<b>7</b>	<b>Appendix</b>	<b>184</b>

**Study Methodology**

This study is based on a wide range of data sources and analytical techniques. Information sources include:

- Personal interviews and discussions with industry supply chain members including end users, converters, paper producers, merchants, suppliers, and other intermediaries and industry observers.
- Retail store, warehouse, commercial channel field visits
- Government census, economic, trade, and manufacturer surveys and databases
- Industry information sources including trade journals, associations, company websites, product releases, published studies and surveys, association data, and other publicly available information
- Internal databases, analysis, and historic & direct industry / professional experience.
- **Note: Proprietary and confidential information developed in the context of private client studies are not incorporated into this study.**



**BDA Qualifications / Expertise**

BDA’s principal, Frank Perkowski, has over 30 years of experience within the paper and packaging industry in senior marketing positions. This includes direct experience in packaging, paper, specialty, and paperboard markets and over fourteen years as an industry-focused management consultant. As a consultant, Frank has worked on over 300 consulting assignments helping industry clients solve a wide range of business and market-related problems. He is a regular speaker at specialty paper and other industry conferences.

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