



# Corrugated Segmentation Study and Opportunity Assessment

## Business Development

### Major Segments Reviewed with # of Sub Segments

- Application - 7
- Board Weight - 8
- Channel - 8
- Customer Size - 5
- Flute Type - 5
- Liner Type- 3
- Merchandising  
Materials - 3
- Print Process - 5
- Product Category - 8
- Regional Demand - 5
- Surface Treatment - 4
- Trays / Retail Ready – 4

### Who Should Buy?

- Containerboard Produc-  
ers
- Corrugated Box Plants
- Mill Chemical and Mate-  
rial Suppliers
- Box Plant Chemical and  
Equipment Suppliers
- Board Distributors and  
Intermediaries
- Industry Investors and  
Analysts
- Corrugated Box / Mate-  
rial Buyers

BDA announces a new study of the North American Corrugated Market.

This in-depth study contains 100 pages of insightful content and 86 tables and charts. The study provides a new look at the category and its major product and market segments and analyzes the impact and implications of recent / emerg- ing developments on the per- formance of these individual segments and the category as a whole. The base year is 2008 with projections to 2013 and historical perspective from 2003.

### Segmentation Analysis and Scope

Major segments and sub- segments will be analyzed in detail and in the context of the overall drivers of category de- mand. 12 different segmenta- tions of the overall category volume will be performed (as shown in the list to the left) re- sulting in over 60 individual sub-segments that are analyzed and quantified.



The scope of the analysis in- cludes the following:

- Market size and demand drivers
- Volume and demand / growth trends (2003, 2008, 2013)
- Sub segment breakdowns and analyses
- Future demand outlook and likely developments
- Technology and end user developments
- End user / retailer dynamics and emerging changes / de- velopments.



## Study Content

Over 60 individual product and market segments will be analyzed and quantified. These segments are the most important within the North American corrugated market. The base year is 2008 with volume estimates and growth rates provided since 2003 and through 2013.

A total of 86 tables and charts are included as detailed below.

Corrugated Study Tables and Charts	
Figure 2-1 Historic Corrugated Demand	Figure 4-33 Print Surface Segmentation Summary
Figure 2-2 Corrugated Segmentation Summary	Figure 4-34 Corrugated Printing Process Overview
Figure 2-3 Segment Size and Growth Rate Summary	Figure 4-35 Graphic Printing Plants by Region
Figure 2-4 Corrugated Growth Offsetting Factors	Figure 4-36 NA Preprint Presses by Region
Figure 2-5 Projected Growth Rates by Segment	Figure 4-37 NA Corrugated Litho Printers by Region
Figure 3-1 Historic Corrugated Shipments and Growth Rates	Figure 4-38 Board Type by Print Process
Figure 3-2 Real Corrugated / Manufacturing Demand Changes	Figure 4-39 Special Coatings Segmentation Summary
Figure 3-3 Corrugated Share of Packaging Materials	Figure 4-40 Special Treated Board Applications and Growth
Figure 3-4 Corrugated Importance by Product Category	Figure 4-41 Special Coatings by Type and Application
Figure 3-5 Product Category Fragmentation	Figure 4-42 Special Treatments by Application and Type
Figure 3-6 Concentration Levels by Product Category	Figure 4-43 Special Treatments by Product Category
Figure 4-1 Corrugated Segmentation Summary	Figure 4-44 Specialty Coated Growth by Application and Type
Figure 4-2 Board / Liner Basis Weight Trends	Figure 4-45 Corrugated Application Segmentation Summary
Figure 4-3 Board Weight Segmentation	Figure 4-46 Application Growth Trends
Figure 4-4 Basis Weight and Flute Relationship	Figure 4-47 Growth of Lightweight Corrugated Applications
Figure 4-5 Liner Volumes by Weight and Converted Flute	Figure 4-48 Demand by Weight Segment and Application
Figure 4-6 Lightweight Linerboard PM's	Figure 4-49 Application Volume by Flute Type
Figure 4-7 Lightweight Linerboard PM Capacity	Figure 4-50 Print Method by Application
Figure 4-8 Print Surface by Liner Weight Group	Figure 4-51 Distribution Channel Segmentation Summary
Figure 4-9 Applications by Basis Weight Segment	Figure 4-52 Corrugated Applications by Channel
Figure 4-10 Linerboard Weight Segments by Product Category	Figure 4-53 Retail Ready Packaging by Channel
Figure 4-11 Lightweight Liner Growth Projection by Application	Figure 4-54 Corrugated Displays by Channel
Figure 4-12 Print Surface Segmentation Summary	Figure 4-55 Products Distributed by Channel
Figure 4-13 Corrugated Print Surface Volume by Application	Figure 4-56 Product Volumes by Channel
Figure 4-14 Corrugated Applications by Print Surface	Figure 4-57 Product Category Segments
Figure 4-15 Print Surface by Product Category	Figure 4-58 Product Category Segmentation Summary
Figure 4-16 Print Surface by Product Category	Figure 4-59 Board Types by Product Category
Figure 4-17 Print Surface by Flute Type	Figure 4-60 Product Category by Weight Class
Figure 4-18 Print Surfaces Used by Print Process	Figure 4-61 Print Process by Product Category
Figure 4-19 Flute Specifications	Figure 4-62 Flute Types by Major Product Category
Figure 4-20 Flute Market Shares	Figure 4-63 Flute Consumption by Product Category
Figure 4-21 Flute Segmentation Summary	Figure 4-64 Small Flute Growth by Product Category
Figure 4-22 Application Share by Flute	Figure 4-65 Corrugated Flute Within Durable Products
Figure 4-23 Small Flute Growth by Application	Figure 4-66 Corrugated Flutes Within Non Durable Products
Figure 4-24 Small Flute Growth by Print Surface	Figure 4-67 Regional Corrugated Shipment Summary
Figure 4-25 Basis Weight by Flute Size	Figure 4-68 Regional Shipment Value by Product Segment
Figure 4-26 Topliner Volume by Weight Group and Flute	Figure 4-69 Category Shipments by Region and Product
Figure 4-27 Small Flute ECT / Strength Ratio	Figure 4-70 Corrugated Demand by Product Category & Region
Figure 4-28 NA Corrugating Plant Profile	Figure 4-71 Regional Corrugated Demand by Product Category
Figure 4-29 Small Flute Converting Capabilities	Figure 5-1 Corrugated Growth Calculation
Figure 4-30 Print Processes Used by Flute Type	Figure 5-2 Sources of Lost Corrugated Volume
Figure 4-31 Small Flute Growth Drivers	Figure 5-3 Corrugated Losses by Segment
Figure 4-32 Small Flute Hurdles to Overcome	Figure 5-4 Growth Volume and Rates by Segment

**North American Corrugated Packaging Segmentation Study**  
**and Opportunity Assessment**

**Table of Contents**

<b>1. Introduction .....</b>	<b>5</b>
A. Study Objective .....	5
B. Scope .....	5
C. Methodology.....	5
D. BDA Qualifications .....	6
E. Data / Liability Limitations .....	7
<b>2. Executive Summary.....</b>	<b>8</b>
A. Corrugated Industry Overview .....	8
B. Corrugated Segments.....	9
C. Market Segment Size and Growth Rates .....	10
D. Outlook.....	12
<b>3. Corrugated Market Overview .....</b>	<b>14</b>
A. Market Size and Historical Results .....	14
B. Corrugated Importance by Product Category .....	16
C. Industry Structures by Product Category.....	19
<b>4. Segmentation Analysis .....</b>	<b>22</b>
A. Overview .....	22
B. Value of Segmenting the Market.....	23
C. Board and Liner Basis Weight.....	24
D. Print Surface .....	34
E. Flute Types .....	40
F. Print Methods .....	54
G. Specialty Coatings .....	62
H. Board Applications .....	68
I. Distribution Channels .....	74
J. Product Categories.....	80
K. Regional Demand .....	89
<b>5. Industry Outlook .....</b>	<b>95</b>
A. Emerging / Significant Trends and Developments.....	95
B. Major Threats and Opportunities.....	99

**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 professional experience.



**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 graphic paperboard markets and over twelve years as an industry-focused management consultant. As a consultant, Frank has worked on over 180 consulting assignments helping industry clients solve a wide range of business and market-related problems. This is a follow-up to a 2005 study on the graphic corrugated market.

---

**Order Information**

The base price for one PDF copy of this study is \$4,900.

A multi site license within the same company is available at a cost of \$300. Payment in the form of a check or wire transfer is due prior to report delivery. This signed order form can be faxed to [BDA](#) at 770-650-8145 or sent via email to BDA at [frank@bd-advisory.com](mailto:frank@bd-advisory.com). Please indicate your purchase selection below along with identification information and your signature and forward to Frank Perkowski.

Base Study Price for 1 PDF version of the report.....\$4,900

Multi-site company license.....\$300

Buyer Signature.....

Buyer Name .....

Company / Location.....

Phone # .....

email.....

---

**Business Development Advisory, Inc, 1307 Hatton Walk, Marietta, GA 30068,**  
[www.bd-advisory.com](http://www.bd-advisory.com)