



North American Packaging Paper Study and Opportunity Assessment

Business Development Advisory — “Finding Growth in Mature Markets”

Major Packaging Paper Applications (# of Sub segments)

- Kraft bags (5)
- Multiwall bags (6)
- Industrial wrapping (6)
- Foodservice papers (5)
- Food processing papers (8)
- Label face stock (6)
- Release base papers (8)
- Paper tags (4)
- Single-ply packaging papers (6)
- Multi-ply packaging papers (5)

Major Paper / Market Segments (# Sub segments)

- Paper Application (10)
- Paper Grade (7)
- Printing Process (8)
- Surface Treatments (6)
- Primary Fiber Type (2)
- Regional Volume (7)
- End Use Product Category (19)
- Distribution Channel (9)

Summary

BDA announces a new study of the North American Packaging Papers Market. This major market segment accounts for approximately 3.9 million tons annually and producer sales of about \$4.0 billion in 2009 in the US market.

The in-depth study contains 96 pages of insightful content and 74 tables and charts. This first ever study takes a new look at the category and breaks it down into 10 major paper application categories and 9 market / product segments (see sidebar). In all, the study segments the total volume across over 100 sub segments and provides individual forecasts and analyses of major trends and developments that drive demand.

The study uses 2009 as the base year and includes projections to 2014 and historical perspective from 2004. The primary focus is on the US / NA market with particular emphasis on paper—based packaging materials.



Analysis and Scope

Major trends and developments within these segments are analyzed in detail and in the context of the overall drivers of category demand. The scope of the analysis includes the following:

- Demand and growth trends by segment (2004, 2009, 2014)
- Demand drivers and reducers by segment
- Current / emerging technologies and market developments
- Major opportunities and threats by segment
- Competitor shares by segment
- Major processes, paper grades, and fibers employed
- Price levels by grade and application
- Supply chain implications and conclusions.

Study Exhibits

Over 100 individual segments within this large and dynamic market have been quantified and analyzed relative to demand, growth, producer shares, trends, developments, drivers, opportunities, and risks. The following table provides the list of 74 tables and charts that are included in the report.

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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 direct industry / 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 packaging, paper, and paperboard markets and over twelve years as an industry-focused management consultant. As a consultant, Frank has worked on over 200 consulting assignments helping industry clients solve a wide range of business and market-related problems.

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