

PULP & PAPER

Strategic Review 2017

Now in its 26th consecutive annual edition, the Pulp & Paper Strategic Review is the only detailed review and analysis of the Australian and New Zealand pulp and paper industries



Corrugated boxes

**Magazines
& catalogues**

Bags & sacks

General printing

Folding cartons

**Newspapers
& newsprint**

Toilet paper

**Supply chain
dynamics
& changes**

**The comprehensive analysis of the Australian
and New Zealand Pulp & Paper Industry**

In this edition:

- Easy to review 'snapshot infographics' providing key sector specific data 'at a glance', for both Australia and New Zealand
- New trend scenario forecasts for Australian consumption to 2022
- New trend scenario forecasts for New Zealand consumption to 2022
- '2017 Overview & 2022 Outlook' presented as a separate publication, 'Seventeen22'

www.industryedge.com.au

Analysis

supporting business decisions

The 2017 Pulp and Paper Strategic Review provides comprehensive coverage and analysis of the quantitative experience and strategic developments in the Australian and New Zealand pulp and paper industries, over the course of the past year and last decade.

Now in its 26th consecutive annual edition, the Review remains the most comprehensive and accurate analysis of the paper, paperboard and fibre supply sectors in Australasia. The Review has been meticulously researched, over the course of the last year.

The Review details all relevant manufacturing, imports, exports and distribution and end-use markets within Australia and New Zealand, for the decade up to and including 2016-17.

A full chapter describes the industry context from a macro and trend perspective, painting a picture, as well as pathways to the future.

Demand forecasts chart the future

New trend based consumption forecasts for the five years to 2022 are included for all major grades, for Australia and New Zealand.

Demand drivers are examined in detail with particular reference to trends in:

- Advertising expenditure
- Digital communications and online data
- Population, demographics and markets
- Consumption of paper and paper products

Production and trade in full detail

Production, import, export and consumption data in the Review is the most complete and accurate ever assembled, presented in both graphs and tables.

Imports and exports are documented on a volume, country of origin or destination and price basis, showing the quantity and price trend for individual grades over a ten-year time frame.

Comprehensive information on the region's production base is provided and all manufacturing facilities are described in consistent detail.

Contents Summary

The review is provided in sections covering:

- Supply Chain Dynamics and Sustainability, describes and analyses global, Australian and New Zealand demand for all major grades of paper, addresses sustainability issues throughout the supply and value chain and sets the scene for the detailed sectoral analysis throughout the Review
- Fibre Supply, including pulp production, imports and recovered paper grades and markets, which are a major Australian export
- Printing and Communications Papers, focusing on all grades of paper, all markets and end uses, production, imports and exports. This section includes detailed coverage of office and writing papers in Australia. It analyses the latest developments for catalogue and magazine papers
- Newsprint, impacted globally by digitization the world over, is faced with declining markets in Australia and New Zealand
- Tissue, especially the rising tide of imports, is addressed in detail, with analysis for the world, Australia and New Zealand based on detailed data of all production and trade
- Packaging, Containerboard and Cartonboard Papers, continues to be the strongest sector in the Australasian industry, including ownership changes, new and closed Australian production capacity and stability underpinned by economic growth
- Paper Distribution, including up-to-date information on paper merchants, distribution channels and the size of the Australasian market
- Sector infographics provide a sectoral overview 'at a glance', including consumption forecasts for both Australia and New Zealand

Seventeen²²

The Review will be provided with 'Seventeen²²', the companion '2017 Overview & 2022 Outlook' publication, capturing the key data and information as a quick and easy reference guide. Prepared in conjunction with Appita (the Australasian Pulp & Paper Industry Technical Association), for the first time, the only analysis of paper, paper products and fibre markets is provided with the most up to date technical, procurement and facilities information.

6 good reasons to subscribe to the 2017 PULP & PAPER STRATEGIC REVIEW

- **COMPLETE** strategic analysis and information, manufacturing and trade data and analysis and technical information
- **INTEGRATED** picture of demand and supply for pulp, recovered paper and every major grade of paper, including production, import and export data
- **ACCURATE** price and volume data essential for business decision making
- **EXPERT** analysis with crisp, clear and precise commentary
- **FORECASTS** of consumption based on trend scenarios
- **ANALYSIS** and review from experts engaged in markets on an ongoing basis
- **SUPPORTED** by a slide deck containing every chart in the Review, ready for use in subscriber's own work
- **COUPLED** with
- **BACKED UP** by ongoing access to the IndustryEdge team, over the coming year

For details on the contents of the **2017 Pulp & Paper Strategic Review**, go to www.industryedge.com.au, or email info@industryedge.com.au for samples and other information.

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Tim Woods is Managing Director of IndustryEdge.

Tim Woods is Managing Director of IndustryEdge. He has extensive expertise in business strategy, industry policy and analysis, government and public relations and communications and consults to many Australian businesses.

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