

PULP & PAPER

Strategic Review 2016

Now in its 25th 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**
- **Bags and sacks**
- **General printing**
- **Commercial printing**
- **Copy and office papers**
- **Folding cartons**
- **Newspapers**
- **Toilet paper**

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

In this edition:

- Easy to review 'snapshot infographics' providing key sector specific data 'at a glance', for both Australia and New Zealand
- Forecasts for Australia consumption to 2021
- Forecasts for New Zealand consumption to 2021
- Detailed '2016 Overview and 2021 Outlook' presented as a separate publication, 'Sixteen21', provided FREE to subscribers to the full Review

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Strategic Review 2016

Review and analysis of the Australian & New Zealand pulp and paper industries

Overview

Analysis supporting business decisions

The 2016 Pulp and Paper Strategic Review provides unrivalled 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 the last decade.

Now in its 25th consecutive annual edition, the Review remains the most comprehensive and accurate analysis of the paper, paperboard and fibre supply sectors in Australasia. It details all manufacturing, imports, exports and distribution and end-use markets within Australia and New Zealand, for the decade up to and including 2015–16.

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

Consumption forecasts to 2021 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, especially print versus on-line
- Population, demographics and markets
- Consumption of paper and paper products

Production and trade in full details

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

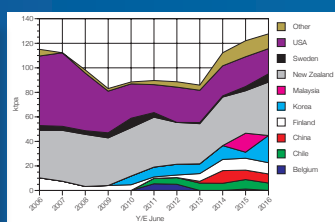
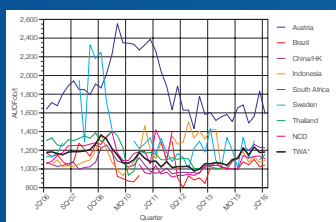
Comprehensive information on the region's production base is provided and all manufacturing facilities are described in consistent detail.

6 good reasons to subscribe to the 2016 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 built on sound economic principles
- ANALYSIS and review from experts engaged in markets on an ongoing basis

For a copy of the Tables of Contents and a complete list of the charts and tables in the Review, call (+61) 3 5229 2470 or email: info@industryedge.com.au





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 dashboards** provide a sectoral overview 'at a glance' and consumption forecasts for both Australia and New Zealand



Authors & Analysts

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Tim Woods is Managing Director of IndustryEdge.

Tim has extensive expertise in business strategy, industry policy, government and public relations and communications and consults to many Australian businesses.

He is contributing editor of the monthly market intelligence report Pulp and Paper Edge, the annual Pulp and Paper Strategic Review and lead consultant for IndustryEdge's numerous consulting assignments.

In addition to more than twenty years of Australian experience in the pulp and paper industry, Tim has practical expertise in the Asia Pacific region.

Jason Corbett

Jason Corbett is Senior Information Analyst at IndustryEdge.

Jason has extensive experience and expertise in researching and collating data that informs IndustryEdge analysis and commentary.

Editing was undertaken by the IndustryEdge Team.

Nicole Armstrong

Nicole Armstrong is an Information Analyst at IndustryEdge.

In addition to research and data analysis, Nicole provides editing support.

The Review will be provided with 'Sixteen21', the companion '2016 Overview & 2021 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 along with the most up to date technical, procurement and facilities information.

