

PULP & PAPER

Strategic Review 2014

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



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OVERVIEW



The 2014 Pulp and Paper Strategic Review provides unrivalled coverage 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 23rd consecutive annual edition, the Review remains the most comprehensive, **accurate and respected analysis** of the pulp and paper sectors in Australasia. It covers all manufacturing, imports, exports and distribution and markets within Australia and New Zealand.

The Review commences with **in-depth strategic analysis** of the sectors, establishing the industry's strengths and weaknesses and identifying threats and opportunities. A full chapter describes the context of the industry from a macro and trend perspective, with reference to legislation and regulation.

Each sector is placed in **international context** with global data and **consumption forecasts** for the next five years for pulp, the four main printing and communication paper grades, paperboard, tissue and newsprint. Each is based on the consumption experience over the last twenty-four years and leading economic projections.

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

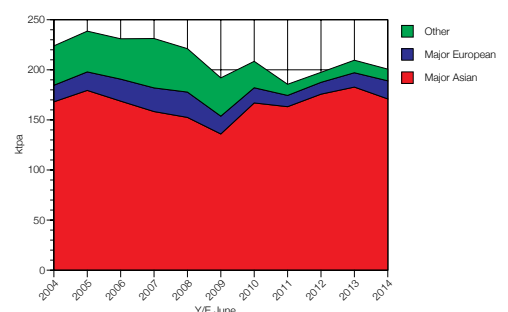
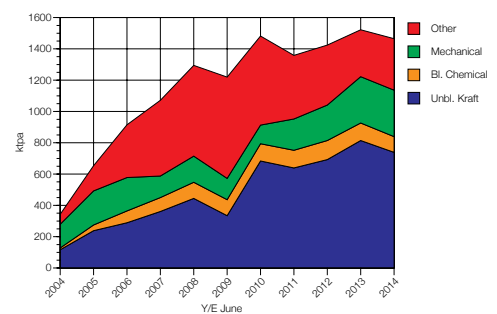
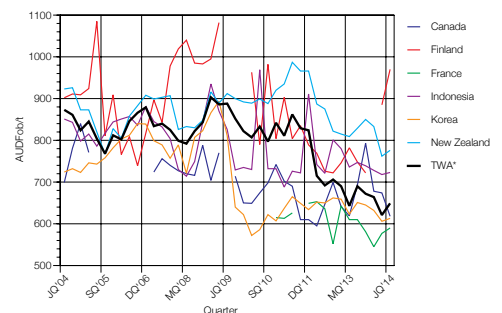
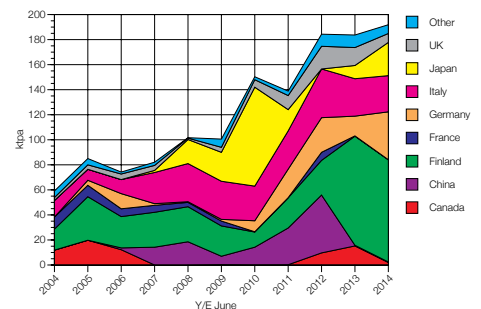
- Advertising expenditure, especially print versus on-line
- Population, demographics and markets
- Consumption of paper and paper products, with a full decade of detail

Data in the Review covers a wide range of grades, with volumes, quarterly and **annual pricing information** in both money and real price terms. These are compared to economy-wide benchmark indices. Data is presented in both **graphs and tables**.

Australian and New Zealand **manufacturing data** is included up to June 2014 and back for a decade, providing a strong and reliable base for our comprehensive analysis.

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

Comprehensive information on the **national 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**, (including Specialty 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**, Container 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
- New information includes comprehensive and detailed examination of mega-trends, industry strategic, policy, regulatory and sustainability issues for Australia.

6 GOOD REASONS TO SUBSCRIBE TO THE 2014 PULP & PAPER STRATEGIC REVIEW

- **Unique blend** of strategic information and manufacturing and trade data and analysis
- **Fully 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
- **Reliable forecasts** built on sound economic principles
- The only **complete Review** and analysis of the Australasian paper, paper products and pulp industry.

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

AUTHORS

TIM WOODS

Tim Woods is Managing Director of IndustryEdge.

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

He is contributing author and editor of the monthly market intelligence report Pulp and Paper Edge, the annual Pulp and Paper Strategic Review and lead author of the monthly Wood Market Edge and annual Forest and Wood Strategic Review.

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.

YUTHI SRIVASTAVA, an Information Analyst with IndustryEdge, contributed to analysis of some sectors.

Editing was undertaken by **KATHLEEN RICHES** and **SARAH FITZPATRICK**.



