

North American Graphic Paper Forecast - Excerpt

June 2010

Overview

Below are the Table of Contents, List of Tables and a sample table from the five-year *North American Graphic Paper Forecast*.

This report provides a forecast through 2015 of supply, demand, prices and costs for over 50 graphic paper grades in North America. The *Forecast* contains an executive summary for the market as a whole, a macroeconomic overview and detailed analysis for each paper grade within the major sectors: newsprint, printing and writing papers and recovered paper and pulpwood.

For additional information, please email us at sales@risi.com.

Table of Contents

Executive Summary	1
Economic Outlook	15
Newsprint	37
Printing and Writing Papers	57
Recovered Paper and Pulpwood	113

List of Tables

Executive Summary

Table 1	North American Macroeconomic Summary
Table 2	North American Total Paper and Board Summary
Table 3	North American Newsprint Summary
Table 4	North American Printing and Writing and Related Paper Summary
Table A1	North American Graphic Paper Summary

Economic Outlook

Table 1	US Economic Outlook
Table 2	Canadian Economic Outlook
Table A1	Cost Inflaters for the North American Pulp and Paper Industry
Table A2	US Economic Summary
Table A3	Canadian Economic Summary

Newsprint

Table 1	World Demand for Newsprint
Table 2	World Newsprint Capacity Expansions Used in This Forecast through 2015
Table 3	North American Newsprint Capacity Used in This Forecast through 2015
Table 4	Newsprint Net Imports and Exports by Major World Region
Table A1	North American Newsprint Analytical Table
Table A2	Newsprint Prices and Costs
Table A3	US South Newsprint Production Costs
Table A4	US Northwest Newsprint Production Costs
Table A5	Eastern Canadian Newsprint Production Costs
Table A6	Western Canadian Newsprint Production Costs

Printing and Writing Papers

Table 1	Growth in US Uncoated Freesheet Apparent Consumption by Grade from 2009 to 2015
Table 2	US Coated Freesheet Paper Imports by Country of Origin
Table 3	US Coated Mechanical Paper Imports by Country of Origin
Table 4	US Uncoated Freesheet Paper Imports by Country of Origin
Table 5	US Uncoated Mechanical Paper Imports by Country of Origin
Table 6	Coated Mechanical Paper Capacity Changes Used in North America through 2015
Table 7	Coated Freesheet Paper Capacity Changes Used in North America through 2015
Table 8	Uncoated Freesheet Paper Capacity Changes Used in North America through 2015
Table 9	Uncoated Mechanical Paper Capacity Changes Used in North America through 2015
Table A1	North American Printing and Writing and Related Papers Summary
Table A2	US Total Printing and Writing Paper

Learn More

For more information about this report or other RISI products and services, email info@risi.com, call 866.271.8525 (in the USA & Canada) or +32.2.536.0748 (outside the USA & Canada), or visit www.risi.com

	Summary		
Table A3	Canadian Printing and Writing and Related Papers Summary	Table A17	Average Production Costs of Existing Mills for 20 lb. Cut-Size Paper at Integrated, Virgin Fiber Mills in the US South
Table A4	Analysis of US Printing and Writing Paper Usage in the Magazine End-Use	Table A18	Average Production Costs of Existing Mills for 20 lb. Formbond Paper at Integrated, Virgin Fiber Mills in the US South
Table A5	Analysis of US Printing and Writing Paper Usage in the Book End-Use	Table A19	US Coated Paper Prices and Costs
Table A6	Analysis of US Printing and Writing Paper Usage in the Label and Wrap End-Use	Table A20	Average Production Costs of Existing Mills for 60 lb. Coated No. 3 Paper in Rolls at Integrated, Virgin Fiber Mills in the US North
Table A7	Analysis of US Printing and Writing Paper Usage in the Envelope Converting End-Use	Table A21	Average Production Costs of Existing Mills for 34 lb. Coated No. 5 Paper in Rolls at Integrated, Virgin Fiber Mills in the US North that Purchase or Transfer Kraft Pulp from Offsite
Table A8	Analysis of US Printing and Writing Paper Usage in the Stationery and Tablet End-Use	Table A22	US Uncoated Freesheet Demand by Grade
Table A9	Analysis of US Printing and Writing Paper Usage in the Form Converting End-Use	Table A23	US Uncoated Mechanical Demand Summary
Table A10	Analysis of US Printing and Writing Paper Usage in the Other Converting End-Use	Table A24	US Coated Paper Demand Summary
Table A11	Analysis of US Printing and Writing Paper Usage in the Directory End-Use	Table A25	US Bristol Papers
Table A12	Analysis of US Printing and Writing Paper Usage in the Catalog End-Use	Table A26	Cotton Fiber Papers
Table A13	Analysis of US Printing and Writing Paper Usage in the Insert and Mailer End-Use	Table A27	Book and Writing Paper Summary for Canada
Table A14	Analysis of US Printing and Writing Paper Usage in the Office Reprographics End-Use	Table A28	Canadian Uncoated Mechanical Demand Summary
Table A15	Analysis of US Printing and Writing Paper Usage in the Other Commercial Printing End-Use		Recovered Paper and Pulpwood
Table A16	US Uncoated Paper Prices and Costs	Table A1	US Recovered Paper Price Summary
		Table A2	US Pulpwood Prices by Region
		Table A3	Canadian Pulpwood Prices by Province

Sample Table

Table A1
North American Graphic Paper Summary
Thousand Tonnes

	09:III	09:IV	010:I	010:II	010:III	010:IV	011:I	011:II	2009	2010	2011	2012	2013	2014	2015
Apparent Consumption	8,090	8,156	8,049	8,057	7,927	7,831	7,946	7,935	31,738	31,863	31,713	30,801	30,046	29,676	28,271
%CH	20.0	3.3	-5.1	0.4	-6.3	-4.8	6.0	-0.6	-18.9	0.4	-0.5	-2.9	-2.5	-1.2	-4.7
US	7,333	7,419	7,339	7,337	7,209	7,108	7,224	7,210	28,854	28,993	28,812	27,945	27,225	26,880	25,553
Canada	757	737	711	720	718	722	722	724	2,884	2,871	2,900	2,857	2,820	2,796	2,717
Imports	653	739	724	719	691	713	727	743	2,694	2,847	2,943	2,862	2,774	2,845	2,773
%CH	21.8	63.8	-7.9	-3.0	-14.7	13.8	7.9	8.9	-22.4	5.7	3.4	-2.7	-3.1	2.5	-2.5
US	2,148	2,222	2,142	2,104	2,089	2,082	2,070	2,066	8,689	8,417	8,280	8,085	7,819	7,796	7,510
From Canada	1,550	1,541	1,470	1,438	1,451	1,421	1,396	1,376	6,210	5,780	5,551	5,436	5,255	5,160	4,937
From Other	599	682	673	666	638	660	674	689	2,479	2,637	2,729	2,650	2,564	2,636	2,573
Canada	288	315	279	292	293	295	295	295	1,157	1,158	1,181	1,165	1,153	1,146	1,122
From US	234	259	228	240	242	243	243	242	946	953	972	957	946	941	925
From Other	54	56	50	51	52	52	52	52	211	205	209	208	206	204	197
Exports	915	1,045	1,165	1,047	1,027	1,015	1,023	1,016	3,522	4,253	4,044	3,878	3,882	3,899	3,824
%CH	95.0	69.6	54.8	-34.8	-7.6	-4.6	3.2	-2.6	-20.2	20.8	-4.9	-4.1	0.1	0.4	-1.9
US	698	752	766	727	721	712	719	714	2,598	2,927	2,848	2,780	2,783	2,793	2,767
To Canada	234	259	228	240	242	243	243	242	946	953	972	957	946	941	925
To Other	464	494	538	487	480	469	477	471	1,652	1,974	1,876	1,823	1,837	1,852	1,842
Canada															
To US	1,550	1,536	1,469	1,438	1,451	1,421	1,396	1,376	6,205	5,780	5,551	5,436	5,255	5,160	4,937
To Other	452	551	627	560	547	545	546	545	1,870	2,279	2,167	2,054	2,045	2,047	1,982
Shipments (seas. adj.)	8,318	8,437	8,513	8,414	8,233	8,113	8,263	8,236	32,565	33,273	32,815	31,818	31,155	30,733	29,324
%CH	22.0	5.9	3.6	-4.6	-8.3	-5.7	7.6	-1.3	-18.7	2.2	-1.4	-3.0	-2.1	-1.4	-4.6
US	5,883	5,949	5,963	5,960	5,841	5,739	5,873	5,858	22,763	23,503	23,380	22,639	22,189	21,877	20,810
Canada	2,435	2,488	2,550	2,454	2,392	2,374	2,390	2,377	9,802	9,770	9,436	9,179	8,966	8,856	8,514
Capacity	9,872	9,650	9,384	9,039	8,870	8,832	8,795	8,756	39,814	36,125	34,993	34,387	33,754	33,086	32,258
%CH	-3.5	-8.7	-10.6	-13.9	-7.3	-1.7	-1.6	-1.8	-8.3	-9.3	-3.1	-1.7	-1.8	-2.0	-2.5
US	6,786	6,744	6,651	6,472	6,368	6,337	6,320	6,303	27,451	25,828	25,172	24,772	24,335	23,778	23,061
Canada	3,086	2,906	2,734	2,567	2,502	2,495	2,476	2,453	12,363	10,297	9,820	9,615	9,419	9,307	9,197
Operating Rate (ship/cap)	0.84	0.87	0.91	0.93	0.93	0.92	0.94	0.94	0.82	0.92	0.94	0.93	0.92	0.93	0.91
US	0.87	0.88	0.90	0.92	0.92	0.91	0.93	0.93	0.83	0.91	0.93	0.91	0.91	0.92	0.90
Canada	0.79	0.86	0.93	0.96	0.96	0.95	0.97	0.97	0.79	0.95	0.96	0.95	0.95	0.95	0.93

Note: Graphic paper includes newsprint and printing & writing papers