

Overview

Below are the Table of Contents, List of Tables as well as a sample table from the *North American Paper Packaging Forecast*.

This report provides a forecast through 2014 of supply, demand, prices and costs for over 15 paper packaging grades in North America. The *Forecast* contains an executive summary for the market as a whole, a macroeconomic overview and detailed analysis for each packaging grade within the major sectors: corrugated box and containerboard, boxboard, packaging and industrial papers and recovered paper and pulpwood.

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

Table of Contents

Executive Summary	1
Economic Outlook	13
Corrugated Box and Containerboard	35
Boxboard	59
Packaging and Industrial Papers	83
Recovered Paper and Pulpwood	101

List of Tables

Executive Summary

Table 1	North American Packaging Papers and Board 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

Corrugated Box and Containerboard

Table 1	Major Containerboard Capacity Changes in North America, 2008-2014
Table A1	North American Containerboard Summary
Table A2	US Corrugated Boxes
Table A3	US Containerboard Consumption and Inventories
Table A4	US Linerboard Production
Table A5	US Corrugating Medium Production
Table A6	US Containerboard Pricing
Table A7	US South Unbleached Kraftliner Production Costs
Table A8	US Northwest Unbleached Kraftliner Production Costs
Table A9	US North Recycled Containerboard Production Costs
Table A10	US South Semicheical Medium Production Costs
Table A11	US North Semicheical Medium Production Costs
Table A12	Canadian Corrugated Boxes
Table A13	Canadian Containerboard Shipments

Boxboard

Table 1	Major Boxboard Capacity Changes in North America, 2008-2014
Table A1	North American Boxboard Summary
Table A2	US Bleached Board Summary
Table A3	US Recycled Board Summary
Table A4	US Unbleached Board Summary
Table A5	US Boxboard Pricing
Table A6	US South Clay-Coated Bleached Board Production Costs
Table A7	US North Clay-Coated Recycled Board Production Costs
Table A8	US Folding Cartonboard
Table A9	Other US Folding Cartonboard
Table A10	US Milk Carton and Food Service
Table A11	US Tube, Can and Drum Stock
Table A12	US Gypsum Wallboard Facing
Table A13	Canadian Boxboard

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

Packaging and Industrial Papers

Table 1	Major Packaging Paper Capacity Changes in North America, 2008-2014
Table A1	North American Packaging and Industrial Paper Summary
Table A2	US Kraft Papers - All Grades
Table A3	US Kraft Paper Pricing
Table A4	US South Unbleached Kraft Paper Production Costs
Table A5	US Grocers' and Other Bag Paper Demand

Table A6	US Shipping Sack Paper Demand
Table A7	US Converting and Wrapping Paper Demand
Table A8	US Specialty Packaging and Industrial Papers
Table A9	Canadian Kraft Paper Demand and Supply

Recovered Paper and Pulpwood

Table A1	US Recovered Paper Price Summary
Table A2	US Pulpwood Prices by Region
Table A3	Canadian Pulpwood Prices by Province

Table A1
North American Packaging and Industrial Paper Summary
 Million Tons - Seasonally Adjusted

	09:II	09:III	09:IV	010:I	010:II	010:III	010:IV	011:I	2008	2009	2010	2011	2012	2013	2014
US KRAFT PAPER															
Apparent Consumption	0.301	0.320	0.308	0.307	0.297	0.284	0.279	0.280	1.867	1.220	1.166	1.147	1.130	1.103	1.104
%CH	15.2	26.7	-13.5	-1.9	-12.7	-16.0	-7.3	2.8	2.5	-34.7	-4.4	-1.6	-1.5	-2.4	0.0
Total Exports	0.121	0.139	0.152	0.154	0.158	0.166	0.170	0.171	0.579	0.532	0.649	0.680	0.678	0.698	0.727
Total Imports	0.084	0.094	0.075	0.081	0.082	0.079	0.078	0.079	0.435	0.340	0.320	0.326	0.327	0.317	0.315
Kraft Shipments	0.338	0.364	0.385	0.379	0.373	0.371	0.370	0.373	1.764	1.412	1.494	1.501	1.482	1.484	1.516
%CH	17.0	34.9	24.6	-5.6	-6.4	-2.4	-0.5	2.7	6.8	-19.9	5.8	0.5	-1.3	0.2	2.1
Total Capacity	0.450	0.450	0.470	0.470	0.455	0.438	0.420	0.403	1.870	1.820	1.783	1.603	1.600	1.600	1.603
%CH	0.0	0.0	19.0	0.0	-12.2	-14.5	-15.1	-15.7	3.0	-2.7	-2.1	-10.1	-0.2	0.0	0.2
Kraft Oper. Rate (%)	75.1	81.0	81.9	80.7	82.0	84.8	88.2	92.7	94.3	77.6	83.9	93.7	92.6	92.8	94.6
US SPECIALTY & INDUSTRIAL PACKAGING															
Apparent Consumption	0.569	0.594	0.595	0.576	0.566	0.556	0.552	0.556	2.376	2.349	2.250	2.279	2.306	2.305	2.373
%CH	-13.9	19.0	0.6	-12.4	-7.0	-6.7	-2.4	2.9	-4.1	-1.1	-4.2	1.3	1.2	0.0	2.9
Exports	0.115	0.109	0.110	0.108	0.109	0.112	0.113	0.113	0.438	0.420	0.442	0.453	0.450	0.463	0.483
Imports	0.073	0.086	0.085	0.082	0.081	0.079	0.079	0.079	0.354	0.308	0.321	0.325	0.330	0.335	0.355
Shipments	0.611	0.618	0.620	0.602	0.594	0.589	0.587	0.590	2.460	2.462	2.371	2.407	2.427	2.432	2.501
%CH	-1.0	4.0	1.8	-11.3	-5.4	-3.3	-1.1	2.4	0.0	0.1	-3.7	1.5	0.8	0.2	2.8
Capacity	0.677	0.690	0.690	0.695	0.695	0.695	0.697	0.699	2.814	2.721	2.782	2.808	2.835	2.863	2.892
%CH	8.1	7.9	0.0	2.9	0.0	0.0	1.2	1.2	0.2	-3.3	2.2	0.9	0.9	1.0	1.0
Operating Rate (%)	90.3	89.5	89.9	86.6	85.4	84.7	84.2	84.5	87.6	90.5	85.2	85.7	85.6	85.0	86.5
CANADIAN PACKAGING & INDUSTRIAL PAPER															
Apparent Consumption	0.167	0.177	0.188	0.176	0.174	0.178	0.184	0.188	0.806	0.720	0.711	0.755	0.738	0.751	0.771
%CH	-38.1	25.6	26.1	-22.9	-4.9	11.2	13.1	8.3	2.1	-10.6	-1.3	6.2	-2.3	1.8	2.6
Exports	0.127	0.143	0.120	0.117	0.115	0.112	0.109	0.109	0.521	0.503	0.453	0.444	0.435	0.433	0.440
Imports	0.158	0.171	0.171	0.165	0.167	0.176	0.180	0.182	0.740	0.659	0.687	0.720	0.686	0.703	0.722
Shipments	0.137	0.149	0.137	0.128	0.122	0.114	0.113	0.114	0.587	0.564	0.478	0.479	0.488	0.481	0.489
%CH	-14.4	42.6	-29.9	-21.7	-18.4	-23.1	-5.1	5.8	-0.7	-3.8	-15.4	0.3	1.7	-1.3	1.5
Capacity	0.170	0.170	0.170	0.147	0.135	0.135	0.135	0.135	0.680	0.680	0.552	0.540	0.540	0.540	0.540
%CH	0.0	0.0	0.0	-44.1	-28.9	0.0	0.0	0.0	0.0	0.0	-18.8	-2.2	0.0	0.0	0.0
Operating Rate (%)	80.4	87.8	80.3	87.4	90.4	84.7	83.6	84.8	86.3	83.0	86.5	88.8	90.3	89.2	90.5
TOTAL NORTH AMERICAN PACKAGING & INDUSTRIAL PAPER															
Apparent Consumption	1.038	1.091	1.091	1.058	1.036	1.018	1.015	1.024	4.802	4.290	4.127	4.181	4.175	4.160	4.247
%CH	-11.6	22.3	0.0	-11.4	-8.3	-6.7	-1.2	3.8	-0.6	-10.7	-3.8	1.3	-0.2	-0.4	2.1
Exports	0.364	0.391	0.382	0.379	0.382	0.390	0.393	0.394	1.538	1.455	1.544	1.578	1.563	1.593	1.651
%CH	70.7	34.0	-9.3	-3.0	3.3	8.6	2.6	1.2	11.7	-5.4	6.1	2.2	-0.9	1.9	3.6
Imports	0.315	0.351	0.331	0.328	0.329	0.334	0.337	0.340	1.529	1.306	1.328	1.371	1.342	1.355	1.392
%CH	9.2	54.2	-21.0	-4.1	1.4	6.5	3.6	3.7	1.7	-14.6	1.7	3.3	-2.1	1.0	2.7
Shipments	1.086	1.131	1.142	1.110	1.089	1.074	1.070	1.078	4.811	4.439	4.343	4.388	4.396	4.398	4.506
%CH	2.3	17.6	3.8	-10.8	-7.3	-5.4	-1.3	2.9	2.3	-7.7	-2.2	1.0	0.2	0.0	2.4
Capacity	1.297	1.310	1.330	1.312	1.285	1.268	1.252	1.237	5.364	5.221	5.117	4.951	4.975	5.003	5.035
%CH	4.1	4.1	6.2	-5.3	-8.0	-5.3	-4.8	-4.9	1.2	-2.7	-2.0	-3.2	0.5	0.6	0.6
Operating Rate (%)	83.7	86.3	85.8	84.6	84.7	84.7	85.5	87.2	89.7	85.0	84.9	88.6	88.4	87.9	89.5