

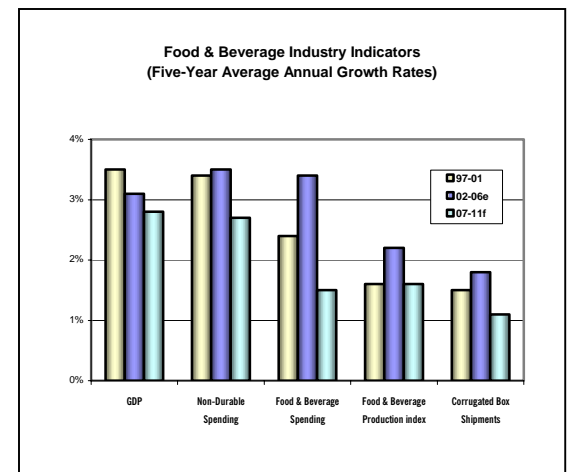
## Prospectus

*U.S. Corrugated Box End-Use Markets* is an all-new report that will help you successfully translate impending market changes into key profit drivers. By combining association and industry data with time-tested RISI forecasting models, this study offers a well-researched and thorough perspective on the evolving demands for corrugated packaging in view of end-user market trends and developments.

RISI's new report will help you answer:

- Which consumer goods markets will observe the strongest growth in corrugated box demand during the next five years?
- How will the changes in trade flows relate to growth in demand for corrugated boxes for each specific market?
- To what extent are end-use markets switching to alternative forms of packaging?

Demand for corrugated boxes traditionally fluctuates with the growth of a wide range of consumer products industries—including both durable and non-durable manufactured goods. In 2005, corrugated box shipments amounted to nearly 400 billion sq. ft., valued at more than US\$23 billion – a healthy gain of 2.3% over 2004. While such growth reflects the strength of the broader U.S. economy, there have been unexpected winners and losers among the various end-use markets.



*Detailed forecasts and analyses of each end-use market provide you with a clear picture of industry growth drivers.*

With corrugated box demand heavily dependent on the health of these consumer products markets, industry stakeholders must move swiftly to understand the issues of strategic importance and exploit growth opportunities as they emerge.

*U.S. Corrugated Box End-Use Markets* provides a complete, yet concise, assessment of corrugated box demand trends in 28 end-use markets in the consumer durable, non-durable, and service segments. Historical data was collected from a range of the most reputable sources, then cross-checked to reconcile any apparent inconsistencies.

### The study includes:

- A forecast of corrugated box shipments to each of the 28 industries through 2011 to assess what industries are driving the growth in overall corrugated box shipments
- A forecast of spending, production, and trade for each of the 28 industries and the food, non-durables and durables aggregates in order to provide context for the corrugated box shipments forecast
- An analysis of the relationship between corrugated box shipments and industrial production/spending (by industry) in order to ascertain the impact of industrial product mix, migration to alternative forms of packaging, etc.
- A summary of RISI's forecast for corrugated box shipments to 2011.

### Sample Table

Beverages Corrugated Shipments and Indicators							
	2005	2006e	2007f	2008f	2009f	2010f	2011f
Corrugated Shipments (Billion Square Feet)	15.9	16.6	Data provided in full report				
% growth		5.0%					
Consumer Expenditures (\$2000 bill)	173	183	186	191	195	197	201
% growth		5.4%	2.0%	2.6%	1.8%	1.4%	1.9%
Imports (\$2000 bill)	11.9	13.1	13.9	14.8	15.7	16.5	17.4
% growth		10.0%	6.3%	6.8%	5.8%	5.1%	5.6%
Exports (\$2000 bill)	2.1	2.2	2.3	2.3	2.4	2.5	2.6
% growth		3.8%	3.7%	3.6%	3.4%	3.3%	3.2%
Industrial Production Index (2002=1.0)	1.11	1.21	1.22	1.26	1.28	1.28	1.30
% growth		9.3%	1.2%	2.5%	1.7%	0.2%	1.6%

*Data table illustrates the relationship between industrial production and an end-use market's corrugated box demand.*

A recommended companion to the *North American Paper Packaging Forecast*, this study will be an invaluable reference tool for:

- U.S. containerboard producers, independent converters, and equipment manufacturers – to better evaluate emerging opportunities
- Purchasing managers at end-use companies – to aid in sourcing decisions
- Financial analysts and investors – to identify strengths and weaknesses within investment portfolios

## The 28 end-use markets covered by this study include:

### Non-Durable Goods

#### Food and Beverage

- Bakery
- Beverage
- Confections
- Canned & Frozen Products
- Dairy
- Meat
- Fresh Produce
- Other Foods

#### Non-Foods

- Apparel
- Chemical
- Petroleum and Coal
- Pharmaceutical
- Plastic and Rubber
- Printing and Publishing
- Resins, etc.
- Soap
- Tobacco

### Durable Goods

- Appliances
- Electrical Machines
- Furniture
- Industrial Machines
- Lumber and Wood
- Metal Products
- Stone, Clay, and Glass
- Transportation Equipment
- Other Durable Goods

### Services

- Freight Shipping

While other reports offered by market research warehouses provide shipment statistics by end-use industry, they fail to provide the kind of rigorous, in-depth economic analysis of packaging markets that RISI has been publishing for the last 20 years — authored by professional economists with an intense specialization in packaging.

## About RISI

RISI is the leading information provider for the global forest products industry. The company works with clients in the pulp and paper, wood products, tissue and nonwovens industries to help them make better decisions.

Headquartered in Bedford, Massachusetts, RISI operates offices in Brussels, Belgium; Atlanta, Georgia; San Francisco, California; Portland, Oregon; Sao Paulo, Brazil; Shanghai, China; Singapore; and Charlottesville, Virginia. More information can be found at [www.risiinfo.com](http://www.risiinfo.com).

## RISI Personnel

The study's principal authors are:



Kenneth Waghorne, Vice President, Packaging Products

Ken has specialized in the paper packaging markets for RISI since 1983. He provides detailed monthly and quarterly analysis and forecasts of the North American paper packaging markets as well as single- and multi-client studies. His contributions to the RISI multiclient studies include the detailed analysis of the international containerboard markets, sector-by-sector forecasts for the U.S. folding carton industry, and an analysis of the paper packaging markets for Latin America. Ken holds a Master of Science degree in Forest Economics from Virginia Tech and his Bachelor of Science degree in Forestry from LSU.



Heidi Kamp, Economist, Consumer Products

Heidi has been an economist with RISI since July 2005. Her focus is on the end-use markets for paperboard. Current projects include contributions to RISI's China Boxboard Study and an Industry Outlook & Market Data Report for The Paperboard Packaging Council. Heidi holds a Master of Science degree in Economics from Caltech and Bachelor of Science degree in Economics as well as a Bachelor of Science Mathematics degree from The University of Minnesota.

### Contributors



Rodney Young, Chief Executive Officer

Formerly Senior Vice President of Paperloop's Information Products division, Rod was President and a founder of Resource Information Systems, Inc. His work in modeling and forecasting the international pulp and paper markets has received worldwide recognition. He holds a BS degree in Forestry from Michigan State University and an MS in Forestry Economics from Virginia Polytechnic Institute.



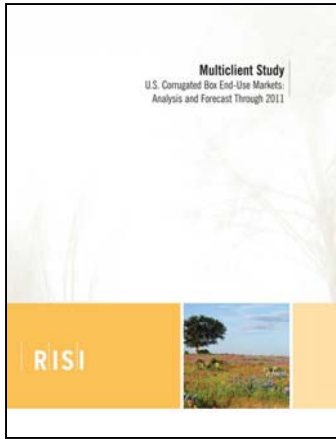
Brendan Lowney, Vice President of Macroeconomics & Mill Information

Brendan Lowney has analyzed the global macroeconomy for RISI since 1994. He edits RISI's *Monthly Economic Commentary* and is responsible for the U.S. and international macroeconomic analysis and forecast work, which forms the basis for RISI's industry projections. The Macro Service covers concepts such as interest rates, exchange rates, inflation and national income account analysis of the macroeconomy across most regions of the world. Brendan has spoken at numerous Conferences in North America, South America, Europe and Asia. In addition to his regular macroeconomic work, Brendan has done policy analysis for several of RISI's single and multi-client studies.



Andrew Battista, Director, Consumer Products

Andrew has spent the last ten years at RISI studying the tissue, nonwovens, printing and writing, and newsprint industries. He provides clients with detailed, recurring analyses and forecasts of regional (continental) markets including the *Tissue Monitor*, a monthly journal of the U.S. tissue market, and the *World Tissue Forecast*, a comprehensive quarterly analysis of regional tissue markets worldwide. In 2006, he published the *U.S. Nonwoven Hygienic Products Forecast*, the first publication of its kind. Andrew holds a Master of Arts degree in Economics from the University of Virginia.



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