

Study Objectives

The study is intended as a strategic planning tool. It illustrates the impact of demand, product quality, industry structure and competition on the future of the tissue business.

Also included in the report :

- Recent trends in consumption and production in different regions and countries
- Descriptions of market and product structures among the major competitors including company profiles by region and country
- Analysis of the driving forces behind tissue demand
- Current demand forecasts through 2018 by the end-use segment (at-home vs. away-from-home) and by product category in each of the leading consumer countries
- Indications of the latest trends in quality (particularly TAD products) and strategic product positioning (brands vs. private labels) in the leading markets
- Identification of recent capacity additions and ongoing projects by country
- Analysis of consolidation in ownership across the industry by region
- Forecasts, of the regional supply and demand outlook for tissue
- Forecasts of capacity utilization rates for the industry
- Analysis of ongoing trends in the raw material base for tissue manufacturing
- Forecasts of fiber furnish developments in the leading, production regions
- Estimates of the leading tissue machine suppliers' market shares from 1990 to present

Study Leader



Esko Uutela, formerly of EU Consulting, now part of RISI, will undertake the study. Roger Bognar of Bognar Enterprises, USA contributes to the North and Central American research. The study team combines more than 50 years of experience in the tissue sector.

Price

- One time report: **USD \$6,800 (approx. 4700 EUR)**
- Corporate License:* **USD \$12,900 (approx. 8900 EUR)**

*Corporate License includes: Copies OWTB Report AND Mid-Year Update + PDFs + Excel Data Files + Internal Distribution Rights + Access to Economist.

Ordering Information

Please return the enclosed order form by mail/fax or email us at info@risi.com or order online at www.risi.com/owtb. If you have any questions or would like to order by telephone, please contact your account manager (see details on enclosed order form).

About RISI

RISI is the leading information provider for the global forest products industry. We work with clients in the pulp and paper, wood products, biomass, timber, 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.

Structure of the Report

The report is segmented by region. There is also a global overview summarizing the key regional trends and comparisons among regions. Another section is dedicated to issues related to the tissue business.

Table of contents:

| | |
|------|---|
| I | Introduction |
| II | Global Overview of Tissue Business Developments |
| III | Tissue Business in North America |
| IV | Tissue Business in Western Europe |
| V | Tissue Business in Eastern Europe |
| VI | Tissue Business in Latin America |
| VII | Tissue Business in the Near and Middle East |
| VIII | Tissue Business in Japan |
| VIII | Tissue Business in China and Asia Far East |
| X | Tissue Business in Oceania |
| XI | Tissue Business in Africa |
| XII | Specific Issues Related to the Tissue Business Contents of the Sections |

Sections II to XI follow the same structure but the depth of the analysis will be adapted to the importance of the region and availability of information.

Each of the above sections include:

Demand Outlook

- Recent consumption trends
- Development of per capita consumption
- Consumption trends in At-Home and AfH sectors
- Consumption trends by product category
- Future driving forces for demand
- Demand forecasts by country for 2011 and 2018
- Forecasts by business sector and product category

Competition and Main Players

- Description of the competitive structure
- Detailed analysis of capacity by country
- Recent mergers, acquisitions and other changes
- Main players and their capacity profiles
- Consolidation within the tissue industry

Supply/Demand Outlook

- Recent production trends
- Net trade developments
- Major trade flows, exporters and importers
- Important, recent capacity changes
- Announced new projects, rebuilds and closures
- Future demand and supply outlook
- Forecast of tissue capacity utilization to 2012

Specific Issues Related to the Tissue Business

- Latest changes in retailing structures
- Quality trends (TAD, new technologies)
- Fiber furnish developments in tissue manufacture
- Market share of tissue machine suppliers

TO ORDER

In North America:

Natalie Rotondi
781.734.8963
nrotondi@risi.com

In Nordic/Eastern Europe:

Tea Tuuli
+32.2.536.0743
ttuuli@risi.com

EMEA & Oceania:

Gregory Ardoullie
+32.2.536.0753
gardoullie@risi.com

In Asia

Levi Li
+86.21.6875.9556
lli@risi.com

In Latin America:

Luis Sucupira
+55.11.3848.9051
lsucupira@risi.com

MAIL: RISI
4 Alfred Circle
Bedford MA 01730
USA

FAX (North America):

781.271.0337

FAX (Europe):

+32.2.536.0757

WEB: www.risi.com/owtb



Order Form

Order the *Outlook for World Tissue Business!*

Price – Single Copy: **USD \$6,800**

Price – Corporate License: **USD \$12,900**

Corporate License includes Access to: Copies OWTB Report AND Mid-Year Update + PDFs + Excel Data Files + Internal Distribution Rights + Access to Economist.

Please complete the information below:

Your Name (please print) _____

Company _____

Address 1 _____

Address 2 _____

City _____

State/Province _____

ZIP/Postal Code _____

Country _____

Phone _____

Fax _____

Email _____

Check here if you do not wish to receive communication about other select offers from RISI via email.

Payment info:

Please send me an invoice (Order will be shipped/access provided upon receipt of payment.)

Payment enclosed. (Make checks payable to "RISI")

Please charge to: Visa MasterCard American Express

Card No. _____

Expiration Date _____

Wire Transfer For payment in USD: RISI, Inc.

Wells Fargo Bank

Acct# 417-5037474

Swift# WFBUS6S or ABA 121000248

For payment in euros: KBC

Agentschap Brussel Louiza

Louizalaan 280B

1050 Brussels

Acct# 433-8257692-10

SWIFT – KREDBEBB

IBAN – BE41 4338 2576 9210