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# Paper & Paperboard: United States

October 2019



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# About This Report

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## Scope

This report forecasts to 2023 US paper and paperboard production and demand in short tons. Total production is segmented by product in terms of:

- unbleached kraft paperboard
- recycled paperboard
- solid bleached paperboard
- semichemical paperboard
- printing and writing paper
- tissue paper
- packaging and industrial paper
- newsprint paper
- other product types such as construction paper, insulating paper, and wet machine board

In addition, total shipments and total demand are forecast to 2023 in nominal US dollars at the manufacturer level.

To illustrate historical trends, total demand, total production, the various production segments, and trade in short tons are provided in annual series from 2008 to 2018. Total shipments and total demand in US dollars are also provided in annual series from 2008 to 2018.

Re-exports of paper and paperboard are excluded from demand and trade figures.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Paper & Paperboard: United States* (FF25011) represents the synthesis and analysis of data from various secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press

## About This Report

- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

Table 8 | NAICS & SIC Codes Related to Paper & Paperboard

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
322121	Paper (except Newsprint) Mills	2621	Paper Mills
322122	Newsprint Mills	2631	Paperboard Mills
322130	Paperboard Mills	2653	Corrugated and Solid Fiber Boxes
322211	Corrugated and Solid Fiber Box Manufacturing	2657	Folding Paperboard Boxes
322212	Folding Paperboard Box Manufacturing	2671	Paper; Coated and Laminated Packaging
322220	Paper Bag and Coated and Treated Paper Manufacturing	2675	Die-cut Paper and Board
322291	Sanitary Paper Product Manufacturing	2676	Sanitary Paper Products

Source: US Census Bureau

## Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis,

## About This Report

end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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## Resources

### The Freedonia Group

#### Freedonia Industry Studies

*Corrugated & Paperboard Boxes*

*Global Adhesives & Sealants*

*Global Nonwovens*

*Retail-Ready Packaging*

*Rigid Bulk Packaging*

#### Freedonia Focus Reports

*Advertising Services: United States*

*Books: United States*

*Commercial Printing: United States*

*Data Processing & Hosting: United States*

*E-Commerce: United States*

*Global Protective Packaging*

*Industrial Clays: United States*

*Internet Content & Search: United States*

*Labels: United States*

*Newspaper Publishing: United States*

*Packaging: United States*

*Polyethylene: United States*

*Recovered Paper: United States*

#### Freedonia Custom Research

### Trade Publications

*American Printer*

*Packaging Digest*

*Packaging Strategies*

*Paper, Film, & Foil Converter*

*PaperAge*

*Tissue World Magazine*

### Agencies & Associations

American Forest & Paper Association

Corrugated Packaging Alliance

Paperboard Packaging Alliance

Pulp and Paper Products Council

Technological Association of the Pulp and Paper Industry

## About This Report

United States Census Bureau  
United States Department of Agriculture  
United States Forest Service  
United States Environmental Protection Agency  
United States International Trade Commission