



Freedonia Focus Reports
US Collection

Paper & Paperboard: United States

August 2017



BROCHURE CLICK TO ORDER
FULL REPORT CLICK TO ORDER

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Market Environment	4
Historical Trends	4
Key Economic Indicators	6
Trade	7
Environmental & Regulatory Factors	9
3. Segmentation & Forecasts	11
Products	11
Unbleached Kraft Paperboard	15
Recycled Paperboard	16
Solid Bleached Paperboard	17
Semichemical Paperboard	18
Printing & Writing Paper	19
Tissue Paper	20
Packaging & Industrial Paper	21
Newsprint Paper	22
Construction & Other Paper & Paperboard Products	23
4. Industry Structure	25
Industry Characteristics	25
Market Leaders	28
International Paper Company	28
Koch Industries	29
WestRock Company	29
5. About This Report	30
Scope & Method	30
Sources	31
Industry Codes	31
Resources	32

List of Tables & Figures

Figure 1 Key Trends in US Paper & Paperboard Production, 2016-2021	3
Figure 2 US Paper & Paperboard Production Trends, 2006-2016	4
Table 1 Key Indicators for US Paper & Paperboard Demand; 2006, 2011, 2016, 2021 (2009US\$ bil)	6
Figure 3 US Paper & Paperboard Trade, 2006-2016 (000 short tons)	7
Table 2 US Paper & Paperboard Exports by Country, 2006-2016 (000 short tons)	7
Table 3 US Paper & Paperboard Imports by Country, 2006-2016 (000 short tons)	8
Figure 4 US Paper & Paperboard Production by Product; 2006-2016, 2021 (000 short tons)	11
Table 4 US Paper & Paperboard Production by Product & Total Demand; 2006-2016, 2021 (000 short tons)	12
Figure 5 US Paper & Paperboard Demand; 2006-2016, 2021	12
Table 5 US Paper & Paperboard Shipments & Demand; 2006-2016, 2021 (US\$ mil)	13
Figure 6 US Paper & Paperboard Demand; 2006-2016, 2021 (000 short tons)	13
Figure 7 US Packaging & Industrial Paper Production & Nondurable Goods Shipments; 2006-2016, 2021	21
Figure 8 US Paper & Paperboard Production by Product; 2006-2016, 2021 (% of short tons)	23
Figure 9 US Paperboard Industry Shipment Concentration; 2002, 2007, 2012	25
Figure 10 US Paper Industry Shipment Concentration; 2002, 2007, 2012	26
Table 6 Leading Participants in the US Paper & Paperboard Industry by Product	28
Table 7 Industry Codes Related to Paper & Paperboard	31

About This Report

Scope & Method

This report forecasts US paper and paperboard production and demand in short tons to 2021. 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.

In addition, total shipments and total demand are forecasted to 2021 in US dollars at the manufacturers' level.

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

To illustrate historical trends, total production, total demand, the various production segments, and trade in short tons are provided in annual series from 2006 to 2016. Total shipments and total demand in US dollars are also provided in annual series from 2006 to 2016.

This report 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.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, 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 primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- 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 7 | Industry Codes Related to Paper & Paperboard

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industry Codes	
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 Mfg	2657	Folding Paperboard Boxes, Including Sanitary
322212	Folding Paperboard Box Mfg	2671	Packaging Paper and Plastics Film, Coated and Laminated
322221	Coated and Laminated Packaging Paper Mfg	2675	Die-Cut Paper and Paperboard and Cardboard
322226	Surface-Coated Paperboard Mfg	2676	Sanitary Paper Products
322291	Sanitary Paper Product Mfg		

Source: US Census Bureau

Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

Resources

The Freedonia Group

Freedonia Industry Studies

Wipes Market in the US, June 2017

Converted Flexible Packaging in the US, May 2017

Retail E-Commerce Packaging Market in the US, November 2016

Rigid Bulk Packaging, September 2016

Corrugated & Paperboard Boxes, April 2016

Freedonia Focus Reports

Advertising Services: United States

Books: United States

Commercial Printing: United States

Corrugated & Paperboard Boxes: United States

Foodservice Disposables: United States

Internet Content & Search: United States

Manufacturing: United States

Municipal Solid Waste: United States

Newspaper Publishing: United States

Paper Industry Machinery: United States

Recovered Packaging: United States

Recovered Paper: United States

Restaurants & Foodservice: United States

Wipes: United States

Freedonia Custom Research

Trade Publications

American Printer

Packaging Digest

Packaging Strategies

Packaging World

PaperAge

Paper, Film & Foil Converter

Tissue World Magazine

Agencies & Associations

American Forest & Paper Association

Corrugated Packaging Alliance

Forest Stewardship Council

About This Report

Paperboard Packaging Alliance
Pulp and Paper Products Council
Recycled Paperboard Technical Association
Sustainable Forestry Initiative
Technological Association of the Pulp and Paper Industry
United States Census Bureau
United States Department of Agriculture
 United States Forest Service
United States Environmental Protection Agency
United States International Trade Commission