



[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table & Chart 5](#)

[Sample Profile, Table & Forecast 6](#)

[Order Form 7](#)

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World Corrugated Boxes

Industry Study with Forecasts for **2013 & 2018**

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
World Economic Overview	5
Recent Historical Trends	5
Macroeconomic Outlook	7
World Demographic Outlook	11
World Personal Consumption Expenditures	12
World Manufacturing Overview	14
World Paper & Paperboard Outlook	15
Competitive Technologies	18
Environmental & Regulatory Issues	20
Pricing Trends	23
International Trade Patterns	24
Corrugated Boxes	25
Containerboard	26

RAW MATERIALS

General	28
Containerboard	28
Recycled Board	31
Kraft Linerboard	32
Semichemical Board	34
Other Materials	35
Adhesives	35
Inks	36
Waxes	37

WORLD CORRUGATED BOX OVERVIEW

General	40
Regional Overview	40
Demand	41
Production	45
End-Use Markets	47

NORTH AMERICA

North America: General	50
North America: Corrugated Box Trends	51
North America: Containerboard Trends	52
United States	53
Canada	61
Mexico	65

WESTERN EUROPE

Western Europe: General	71
Western Europe: Corrugated Box Trends	72
Western Europe: Containerboard Trends	75
Belgium	76

France	81
Germany	86
Italy	91
Netherlands	96
Spain	100
United Kingdom	104
Other Western Europe	109

ASIA/PACIFIC

Asia/Pacific: General	115
Asia/Pacific: Corrugated Box Trends	117
Asia/Pacific: Containerboard Trends	119
Australia	120
China	125
India	132
Indonesia	137
Japan	141
South Korea	146
Taiwan	150
Thailand	155
Other Asia/Pacific	160

OTHER REGIONS

Latin America	166
Argentina	170
Brazil	175
Other Latin America	179
Eastern Europe	184
Poland	187
Russia	192
Other Eastern Europe	198
Africa/Mideast	202
South Africa	206
Turkey	211
Other Africa/Mideast	216

INDUSTRY STRUCTURE

General	221
Corrugated Box Market Share	222
Containerboard Market Share	225
Acquisitions & Divestitures	227
Cooperative Agreements	230
Manufacturing	233
Marketing & Distribution	234

COMPANY PROFILES

Alliabox SAS	237
Amcor Limited	240
Brookfield Asset Management	242
Carter Holt Harvey	244
Cascades Incorporated	245
Constantia Packaging	248
Corporacion Durango	250
DS Smith plc	251

Emin Leydier SA	255
Induspac Packaging	256
International Paper	257
Klabin SA	259
Koch Industries	260
Lee & Man Paper Manufacturing	263
MeadWestvaco Corporation	264
Metsaliitto Group	266
Mondi Group	268
Nampak Limited	271
Nine Dragons Paper	273
Oji Paper	275
Otor SA	276
Packaging Corporation of America	278
Rengo Company	280
ROSSMANN SAS	282
SA Industrias Celulosa Aragonesa	283
San Miguel Corporation	284
Smurfit Kappa Group	286
Smurfit-Stone Container	288
Stora Enso	292
Svenska Cellulosa	295
Tegran Corporation	298
Temple-Inland Incorporated	300
THIMM Group	301
Visy Pty Limited	303
VPK Packaging Group	305
Additional Companies Mentioned in the Study	307

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table	3
-----------------------	---

MARKET ENVIRONMENT

1 World Gross Domestic Product by Region ..	10
2 World Population by Region	12
3 World Personal Consumption Expenditures by Region	14
4 World Manufacturing Value Added	15
5 World Paper & Paperboard Production by Region & Type	18
6 World Corrugated Box Net Exports	26
7 World Containerboard Net Exports	27

RAW MATERIALS

1 World Containerboard Demand by Region & Grade	30
Cht World Containerboard Demand by Grade, 1998-2008	31

(continued on next page)

[Click here to purchase online](#)

List of Tables/Charts

(continued from previous page)

WORLD CORRUGATED BOX OVERVIEW

1 World Corrugated Box Demand by Region	.42
Cht World Corrugated Box Demand by Region, 2008	.....43
Cht Corrugated Box Demand/Manufacturing Value Added Relationship, 2008	.....44
2 World Corrugated Box Shipments by Region	.....46
3 World Corrugated Box Demand by Market	.48
Cht World Corrugated Box Demand by Market, 2008	.....49

NORTH AMERICA

1 North America -- Corrugated Box Supply & Demand	.....52
2 North America -- Containerboard Supply & Demand	.....53
3 United States -- Corrugated Box Supply & Demand	.....57
4 United States -- Containerboard Supply & Demand	.....59
5 Canada -- Corrugated Box Supply & Demand	.....63
6 Canada -- Containerboard Supply & Demand	.....64
7 Mexico -- Corrugated Box Supply & Demand	.....68
8 Mexico -- Containerboard Supply & Demand	.....69

WESTERN EUROPE

1 Western Europe -- Corrugated Box Supply & Demand	.....74
Cht Western Europe -- Corrugated Box Demand by Country, 2008	.....75
2 Western Europe -- Containerboard Supply & Demand	.....76
3 Belgium -- Corrugated Box Supply & Demand	.....79
4 Belgium -- Containerboard Supply & Demand	.....80
5 France -- Corrugated Box Supply & Demand	.....83
6 France -- Containerboard Supply & Demand	.....84
7 Germany -- Corrugated Box Supply & Demand	.....89
8 Germany -- Containerboard Supply & Demand	.....90
9 Italy -- Corrugated Box Supply & Demand	94
10 Italy -- Containerboard Supply & Demand	95

11 Netherlands -- Corrugated Box Supply & Demand	.....98
12 Netherlands -- Containerboard Supply & Demand	.....99
13 Spain -- Corrugated Box Supply & Demand	.....102
14 Spain -- Containerboard Supply & Demand	.....103
15 United Kingdom -- Corrugated Box Supply & Demand	.....106
16 United Kingdom -- Containerboard Supply & Demand	.....107
17 Other Western Europe -- Corrugated Box Supply & Demand	.....111
18 Other Western Europe -- Containerboard Supply & Demand	.....112

ASIA/PACIFIC

1 Asia/Pacific -- Corrugated Box Supply & Demand	.....118
Cht Asia/Pacific -- Corrugated Box Demand by Country, 2008	.....119
2 Asia/Pacific -- Containerboard Supply & Demand	.....120
3 Australia -- Corrugated Box Supply & Demand	.....123
4 Australia -- Containerboard Supply & Demand	.....124
5 China -- Corrugated Box Supply & Demand	.....129
6 China -- Containerboard Supply & Demand	.....131
7 India -- Corrugated Box Supply & Demand	.....135
8 India -- Containerboard Supply & Demand	.....136
9 Indonesia -- Corrugated Box Supply & Demand	.....139
10 Indonesia -- Containerboard Supply & Demand	.....140
11 Japan -- Corrugated Box Supply & Demand	.....143
12 Japan -- Containerboard Supply & Demand	.....144
13 South Korea -- Corrugated Box Supply & Demand	.....148
14 South Korea -- Containerboard Supply & Demand	.....149
15 Taiwan -- Corrugated Box Supply & Demand	.....153
16 Taiwan -- Containerboard Supply & Demand	.....154
17 Thailand -- Corrugated Box Supply & Demand	.....158
18 Thailand -- Containerboard Supply & Demand	.....159
19 Other Asia/Pacific -- Corrugated Box Supply & Demand	.....162
20 Other Asia/Pacific -- Containerboard Supply & Demand	.....163

OTHER REGIONS

1 Latin America -- Corrugated Box Supply & Demand	.....169
2 Latin America -- Containerboard Supply & Demand	.....170
3 Argentina -- Corrugated Box Supply & Demand	.....173
4 Argentina -- Containerboard Supply & Demand	.....174
5 Brazil -- Corrugated Box Supply & Demand	.....177
6 Brazil -- Containerboard Supply & Demand	.....178
7 Other Latin America -- Corrugated Box Supply & Demand	.....182
8 Other Latin America -- Containerboard Supply & Demand	.....183
9 Eastern Europe -- Corrugated Box Supply & Demand	.....186
10 Eastern Europe -- Containerboard Supply & Demand	.....187
11 Poland -- Corrugated Box Supply & Demand	.....190
12 Poland -- Containerboard Supply & Demand	.....191
13 Russia -- Corrugated Box Supply & Demand	.....195
14 Russia -- Containerboard Supply & Demand	.....196
15 Other Eastern Europe -- Corrugated Box Supply & Demand	.....200
16 Other Eastern Europe -- Containerboard Supply & Demand	.....201
17 Africa/Mideast -- Corrugated Box Supply & Demand	.....205
18 Africa/Mideast -- Containerboard Supply & Demand	.....206
19 South Africa -- Corrugated Box Supply & Demand	.....209
20 South Africa -- Containerboard Supply & Demand	.....210
21 Turkey -- Corrugated Box Supply & Demand	.....214
22 Turkey -- Containerboard Supply & Demand	.....215
23 Other Africa/Mideast -- Corrugated Box Supply & Demand	.....218
24 Other Africa/Mideast -- Containerboard Supply & Demand	.....219

INDUSTRY STRUCTURE

Cht World Corrugated Box Market Share, 2008	.....225
Cht World Containerboard Market Share, 2008	.....226
1 Selected Acquisitions & Divestitures228
2 Selected Cooperative Agreements232

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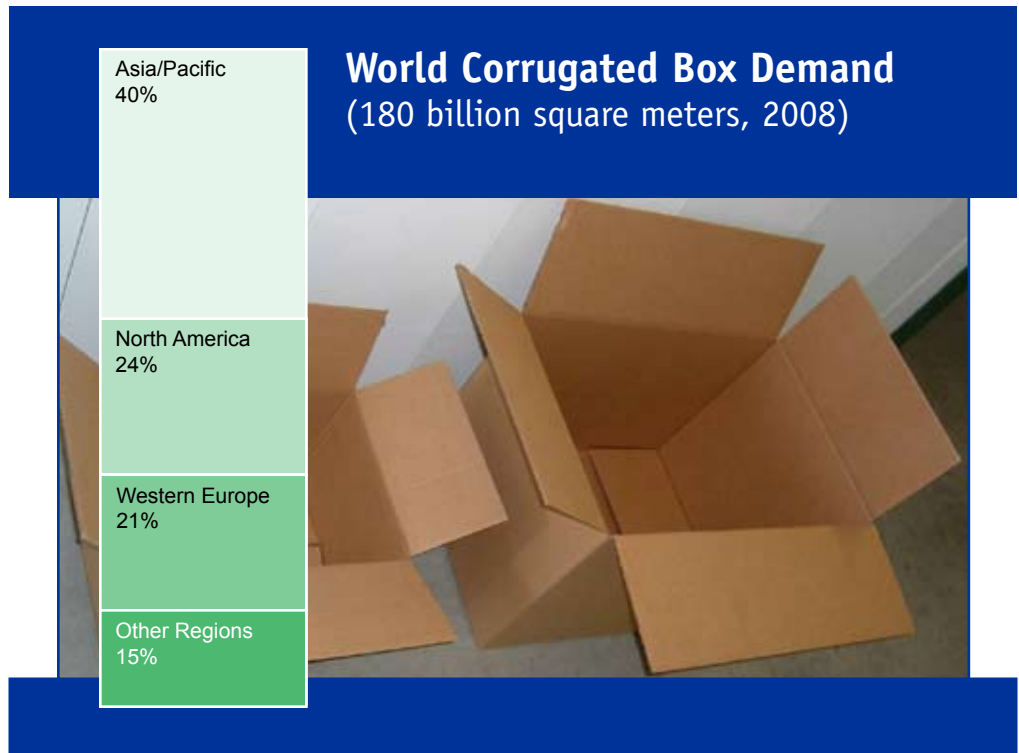
Factors in rising box demand include growth in industrial activities, the penetration of boxes into traditional folding carton applications, and greater interest in boxes as point-of-sale displays.

Global demand to grow 3.4% yearly through 2013

World demand for corrugated boxes is forecast to increase 3.4 percent per year to 213 billion square meters in 2013, in line with real (inflation-adjusted) gains in GDP. Factors contributing to rising box demand include growth in industrial activities, particularly the manufacturing sector, which often requires corrugated packaging to protect and transport goods. In addition, ongoing developments in small flute and high-quality graphic board will allow corrugated boxes to penetrate traditional folding carton applications, especially in the developed world. Greater interest in corrugated packaging as a point-of-sale display in retail applications will also boost demand for value-added corrugated boxes. Additionally, corrugated boxes will benefit from their environmentally friendly image, as well as certain cost advantages compared to plastics crates, which typically involve cleaning and returning costs.

Recycled board to capture more market share

Global containerboard demand growth will trail box production as trends toward the use of higher-performance, lighter board continue. In addition, recycled board will continue to capture market share at the expense of virgin kraft linerboard and semichemical corrugated medium (fluting), accounting for over 70 percent of board by 2013. Advances for recycled board will be bolstered by



consumer, industry and regulatory pressures for environmentally friendly products and practices, rising virgin board prices and rapid demand growth in Asia, which is heavily reliant on recycled liner and fluting.

Developing regions to see fastest increases

The fastest increases will occur in the world's developing regions, although growth rates will moderate from the 2003-2008 period. The Asia/Pacific region, Eastern Europe and the Africa/Mideast region will all outpace the global average. Some of the best gains are expected in China, which will surpass the US as the world's largest corrugated

box market by 2013; and India, which will benefit from strong growth in industrial output and consumer product markets, as well as greater investment in state-of-the-art manufacturing equipment, resulting in improved product quality. China will account for about half of the increase in demand over the forecast period. Greater urbanization and industrialization, and expanding international trade will support advances in these regions' generally underdeveloped packaging sectors. Rising consumer income levels and expanding middle-classes will also generate robust internal demand for packaged consumer goods like processed foods, beverages and personal care items, supporting increases in corrugated box consumption.

**Sample Text,
 Table & Chart**

ASIA/PACIFIC

Through 2013, economic growth in Indonesia is quite respectable by global standards but will remain so the regional average. Although infrastructure investment in recent years, the level relative to GDP remains substantially below other Asian countries in similar stages of economic development. Further investment will be needed to propel the country's industrial growth.

Indonesia: Corrugated Box Trends

Demand for corrugated boxes in Indonesia totaled 1.5 billion square meters in 2008, accounting for four percent of the regional total and two percent of the global totals, respectively. Through 2013, demand is expected to increase 6.0 percent annually to 1.6 billion square meters. Continued economic expansion and infrastructure investment are important factors supporting rising corrugated box demand.

In general, corrugated packaging demand will benefit from Indonesia's relatively low cost and favorable recycling record, as well as from the migration of electronics manufacturing industries to Indonesia from other Asian countries. Increasing interest in point-of-sale and other high-graphic corrugated boxes, while not yet well-established here, will also propel demand throughout the period.

Indonesia produced 1.5 billion square meters of corrugated boxes in 2008, representing four percent of the regional total. Shipments are forecast to increase to 1.6 billion square meters, in line with the Asian average, by 2013, faster than the projected global average). Indonesia runs a surplus in finished corrugated boxes, with exports being sent to Singapore, Australia, Malaysia and the United States.

138

**SAMPLE
 TEXT**

TABLE VII-9

**INDONESIA -- CORRUGATED BOX SUPPLY & DEMAND
 (million square meters)**

Item	1998	2003	2008	2013	2018
Population (mil persons)	200	220	230	240	25.6
\$GDP/capita	1,000	1,500	2,000	2,500	3,000
Gross Domestic Product (bil 2007\$)	100	150	200	250	300
% manufacturing	15	18	20	22	24
Manufacturing Value Added (bil 2007\$)	15	27	40	55	72
sq meters/capita	7.5	10.0	13.0	16.7	21.9
sq meters/000\$ MVA	1.0	1.5	2.0	2.7	3.5
Corrugated Box Demand	0.0	0.0	1.5	1.6	1.7
Food & Beverages	0.0	0.0	0.1	0.1	0.1
Nonfood Nondurable Goods	0.0	0.0	0.4	0.4	0.4
Other Markets	0.0	0.0	1.0	1.1	1.2
+net exports	0.0	0.0	0.0	0.0	0.0
Corrugated Box Shipments	1.5	1.5	1.5	1.6	1.7

**SAMPLE
 TABLE**

CHART IX-1

**WORLD CORRUGATED BOX MARKET SHARE, 2008
 (180 billion square meters)**



**SAMPLE
 CHART**

Sample Profile, Table & Forecast

TABLE VII-10
INDONESIA -- CONTAINERBOARD SUPPLY & DEMAND
 (thousand metric tons)

Item	1998	2003	2008	2013	2018
Corrugated Box Shpts (mil sq meters) 120 grams/square meter	120	120	120	120	120
Containerboard Demand	120	120	120	120	120
+net exports					
Containerboard Production	120	120	120	120	120

SAMPLE TABLE

COMPANY PROFILES

Nine Dragons Paper Holdings Limited
 Sun Hung Kai Centre, 31st Floor, Room 3129
 30 Harbour Road
 Wanchai
 Hong Kong
 852-3929
 http://www

SAMPLE PROFILE

Sales: \$
 Employe

Key Proc and whit, testliner board coated duplex board

Nine Dragons Paper manufactures and sells paperboard packaging products and unbleached kraft pulp in China. In addition, the Company manufactures specialty paper, and bamboo and wood pulp. The Company's principle market is China and sales to overseas customers contributed less than 10 percent % of the total in 2008.

The Company is active in the world corrugated box industry through the production of such paperboard packaging products as linerboard, corrugating medium and coated duplex board. These products, which are marketed under the NINE DRAGONS, SEA DRAGON and LAND DRAGON brand names, are available in over 60 base weights and over 1,000 different sizes and type specifications. Nine Dragons Paper is one of the largest producers of containerboard products in China, as well as one of the largest in the world in terms of capacity. As of June 2008, Nine Dragons Paper had a total annual production capacity of approximately 7.1 million metric tons of paperboard packaging.

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“Demand for containerboard in Indonesia is projected to advance at an annual rate of 5.7 percent through 2013 to 2.6 million metric tons, slowing from the 1998-2008 average pace. Gains will lag growth in box shipments, as the product mix continues to shift in favor of lighter basis weights.

Historically, Indonesia has been a major exporter of containerboard. However, the country's trade surplus has declined over the past decade due to rising domestic demand and is expected to remain relatively flat over the forecast period. Containerboard production is projected to increase ...”

--Section VII, pg. 140

OTHER STUDIES

Rigid Bulk Packaging

Demand for rigid bulk packaging is projected to increase 2.1% annually through 2013. Gains will be bolstered by a shift toward larger, higher-value containers that offer enhanced performance and cost savings. RIBCs and material handling containers will register the fastest gains. The durable goods market will outpace nondurables. This study analyzes the \$6.3 billion US rigid bulk packaging industry, with forecasts for 2013 and 2018 by material, product and market. It also evaluates market share and profiles industry players.

#2483 03/2009..... \$4700

Green Packaging

This study analyzes the US market for environmentally friendly and sustainable packaging. It presents historical recycled content and reusable packaging demand data (1998, 2003, 2008) and forecasts for 2013 and 2018 by material (paper, metal, glass, plastic, biodegradable plastic) and market (e.g., food, beverage, consumer products, shipping, foodservice). The study also discusses source reduction and recycling activity, competitive strategies and merger and acquisition trends, and profiles industry competitors.

#2471 03/2009..... \$4700

World Pressure Sensitive Tapes

World demand for pressure sensitive adhesive (PSA) tapes is projected to grow 5% yearly through 2012. Carton sealing tapes will remain dominant, while double-sided and specialty tapes will grow the fastest. Sales in China, India and Eastern Europe will lead gains, while growth in developed countries will be below average. This study analyzes the \$26 billion world PSA tape industry, with forecasts for 2012 and 2017 by type, material, world region and for 22 countries. It also details market share and profiles industry players.

#2451 02/2009..... \$5800

Produce Packaging

US produce packaging demand will rise 4.2% yearly through 2012. Corrugated boxes will stay the top segment, driven by a shift toward more costly types (e.g., modular, lined, moisture-resistant recyclable). Plastic containers will grow the fastest based in part on the expanding use of clamshells and bowls in ready-to-eat, fresh-cut produce. This study analyzes the \$3.8 billion US produce packaging industry, with forecasts for 2012 and 2017 by type, application and end user. It also evaluates market share and profiles industry players.

#2388 08/2008..... \$4600

Pallets

US demand for pallets will reach 1.5 billion units in 2012. Pallets made from wood will remain dominant, while plastic pallets will grow the fastest based on their durability, ease of cleaning and recyclability. Manufacturing will continue as the largest market, but will be outpaced by providers of warehousing and other storage services. This study analyzes the \$15.4 billion US pallet industry, with forecasts for 2012 and 2017 by material, product, market and region. It also evaluates market share and profiles industry competitors.

#2359 06/2008..... \$4500

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