NA Specialty and Value Added Paper Market Study

Business Development Advisory — "Finding Growth in Mature Markets"

Specialty Paper Grades and # of Sub Grades

Packaging Papers

Coating base (9)
Kraft specialties (20)
Label face stock (9)
Label release base (7)
Laminating base (12)
Lightweight packaging (11)
Medical / hygienic (8)
OGR treated (13)
Security papers (1)
Tissue pkg / wraps (21)
Waxing base (8)

Printing Papers

Art papers (6)
Carbonless (1)
Coating base (1)
Direct thermal base (5)
Latex saturating base (1)
Lightweight printing (4)
Photographic base (6)
Premium cut size (3)
Premium writing (6)
Security papers (5)
Text & cover (8)
Wide format inkjet (5)

Technical Papers

Asphalt saturating base (2)
Décor paper (3)
Electrical papers (7)
Filter base stock (12)
Industrial saturating base (9)
Kraft specialties (2)
Latex saturating base (11)
Tissue packaging / wraps (1)
Wallpaper base (3)

Summary

BDA announces a new study of North American specialty and value added papers and markets. This major but fragmented market segment accounts for approximately 6.7 million tons annually and producer sales of about $8.6 billion in 2010 in the NA market.

The in-depth study contains 187 pages of unique and insightful content including over 100 tables and charts. The study takes an in-depth look at individual grades, markets, and segments and breaks the market down into 27 major specialty paper grades, (see sidebar), over 220 specific applications, 11 application categories, 7 paper grade segments, 7 customer categories, 18 major paper making and 11 major converting processes by grade. In addition, the study estimates producer shares for each specialty grade, reviews historic and forecasted growth trends, and identifies major opportunities, threats, and likely developments across these segments.

The study uses 2010 as the base year and includes projections to 2015 as well as historical perspective going back to 2005.

Analysis and Scope

Major trends and developments within these segments are analyzed in detail and conclusions and implications are identified for supply chain participants. The scope of the analysis includes the following:

- Demand and growth trends for numerous segments (2005, 2010, 2015)
- Demand drivers and reducers by segment
- Current / emerging technologies and market developments
- Major opportunities and threats by segment
- Estimated producer shares & trade balance by grade
- Major paper machine and converting processes employed including forecasts
- Price levels by grade and historical price trends
- Supply chain implications and conclusions.

Study Charts and Tables

This study is highly quantitative with over 100 individual charts and tables breaking down specialty paper markets, grades, sub grades, applications, end use segments, customer groups, producers and production shares by grade, paper machine processes, and converting processes to facilitate a full understanding of these businesses and related dynamics.

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Study Methodology

This study is based on a wide range of data sources and analytical techniques. Information sources include:

- Personal interviews and discussions with industry supply chain members including end users, converters, paper producers, merchants, suppliers, and other intermediaries and industry observers.
- Retail store, warehouse, commercial channel field visits
- Government census, economic, trade, and manufacturer surveys and databases
- Industry information sources including trade journals, associations, company websites, product releases, published studies and surveys, association data, and other publicly available information
- Internal databases, analysis, and historic & direct industry / professional experience.
- **Note: Proprietary and confidential information developed in the context of private client studies are not incorporated into this study.**

BDA Qualifications / Expertise

BDA's principal, Frank Perkowski, has over 30 years of experience within the paper and packaging industry in senior marketing positions. This includes direct experience in packaging, paper, specialty, and paperboard markets and over fourteen years as an industry-focused management consultant. As a consultant, Frank has worked on over 300 consulting assignments helping industry clients solve a wide range of business and market-related problems. He is a regular speaker at specialty paper and other industry conferences.

Order Information

The base price for one PDF copy of this study is $4,995. A multi site license within the same company is available at a cost of $300. Payment in the form of a check or wire transfer is due prior to report delivery. This signed order form can be faxed to BDA at 770-650-8145 or sent via email to BDA at frank@bd-advisory.com. Please indicate your purchase selection below along with identification information and your signature and forward to Frank Perkowski. Please call for pricing by section.

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