

The Paper Packaging Market 2011-2021

Table 4.24 and Figure 4.17 display the South American paper packaging market forecast 2011-2021. Table 4.25 details the South American paper packaging market CAGR (%) 2011-2021, 2011-2016 and 2016-2021.

Table 4.24 South American Paper Packaging Market Forecast 2011-2021 (\$bn, AGR %)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Sales \$bn	16.20	17.06	17.98	18.95	19.94	20.99	22.17	23.37	24.56	25.86	27.25	28.75
AGR(%)		5.3	5.4	5.4	5.2	5.3	5.6	5.4	5.1	5.3	5.4	5.5

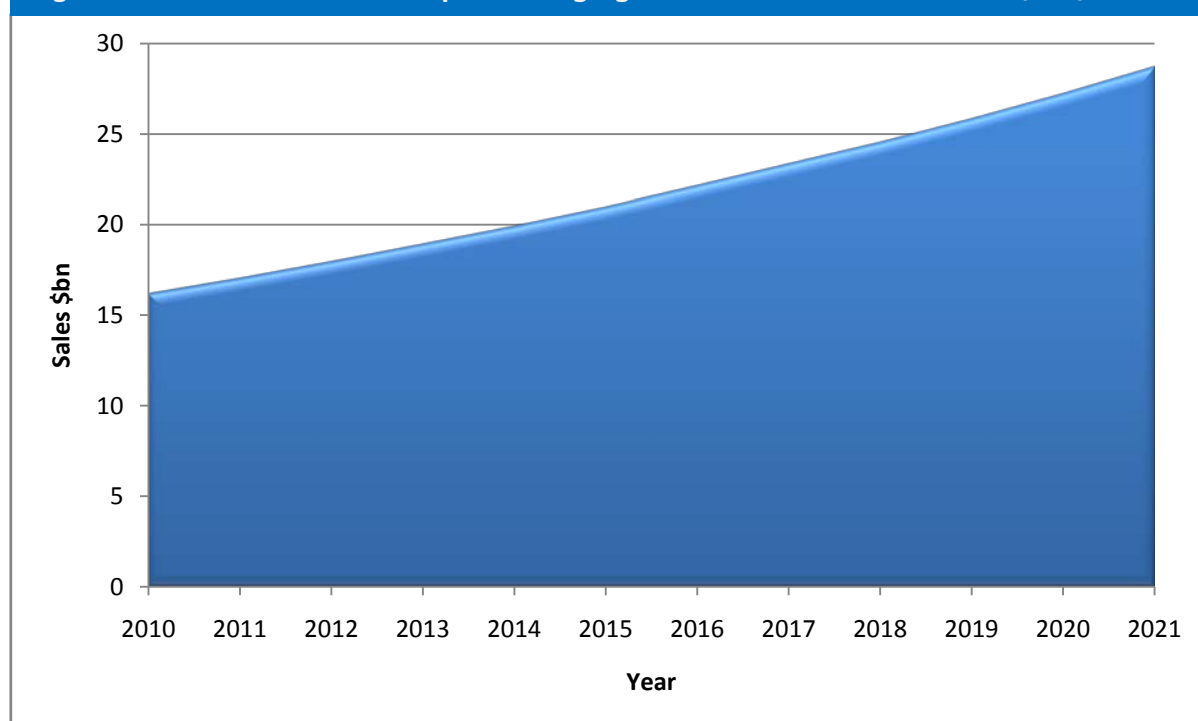
Source: *Visiongain 2011*

Table 4.25 South American Paper Packaging Market Forecast CAGR (%) 2011-2021, 2011-2016, and 2016-2021

	2011-2021	2011-2016	2016-2021
CAGR (%)	5.4	5.4	5.3

Source: *Visiongain 2011*

Figure 4.17 South American Paper Packaging Market Forecast 2011-2021 (\$bn)



Source: *Visiongain 2011*

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Table 5.13 Industrial Paper Packaging Submarket Forecast 2011-2021 (\$bn, AGR %)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Sales \$bn	29.12	30.93	32.81	34.81	36.97	39.26	41.74	44.41	47.16	50.09	53.09	56.22
AGR(%)		6.2	6.1	6.1	6.2	6.2	6.3	6.4	6.2	6.2	6.0	5.9

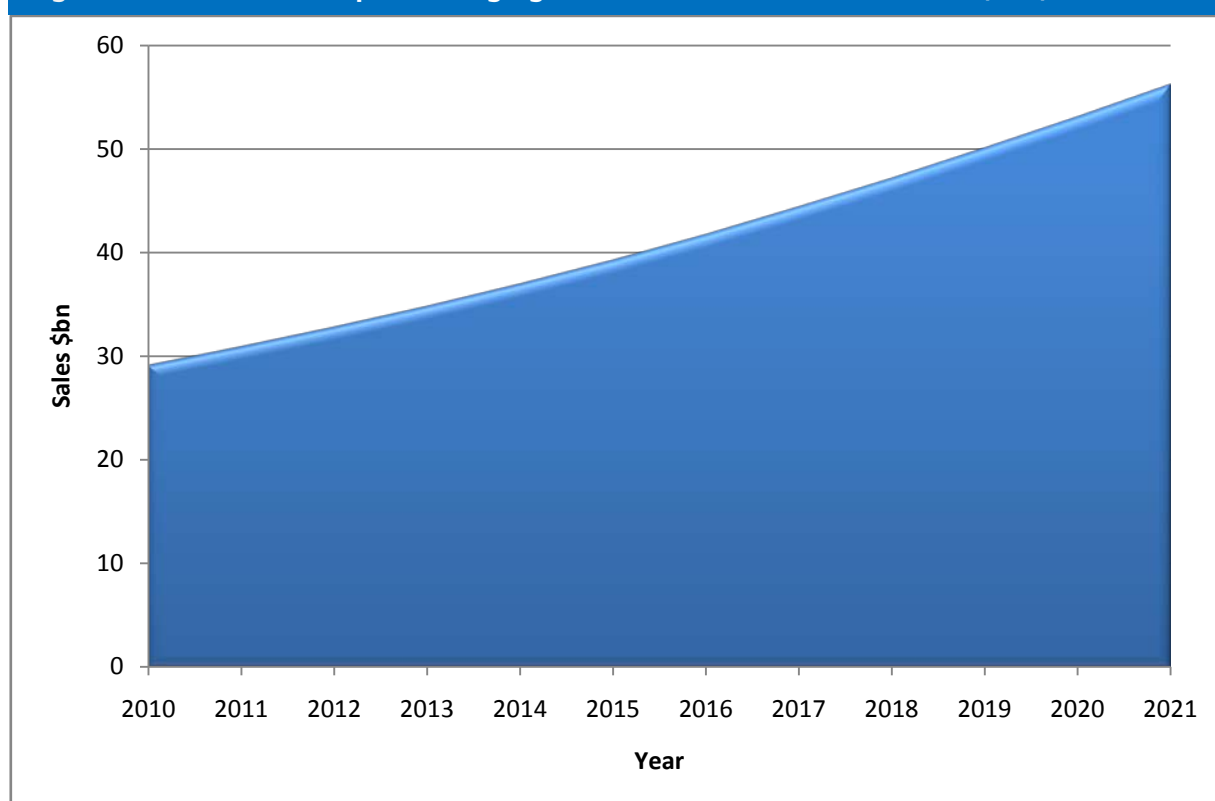
Source: *Visiongain 2011*

Table 5.14 Industrial Paper Packaging Submarket Forecast CAGR (%) 2011-2021, 2011-2016, and 2016-2021

	2011-2021	2011-2016	2016-2021
CAGR (%)	6.2	6.2	6.1

Source: *Visiongain 2011*

Figure 5.10 Industrial Paper Packaging Submarket Forecast 2011-2021 (\$bn)



Source: *Visiongain 2011*

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7. Expert Opinion

7.1 Leading Paper and Packaging Group

Visongain interviewed a spokesperson from a leading top 10 international paper and packaging group. The company produces packaging paper, converted packaging products and uncoated paper, with over 25,000 employees and key operations in Europe, Russia and Africa

7.1.1 Productivity Improvement and Cost Reduction

Visiongain: What do you consider are the key trends and developments in the paper/board packaging market and why?

Spokesperson: A key focus for paper packaging manufacturers along with creating innovative, functional, eco-friendly packaging, is continued productivity improvement and cost reduction. The restructuring of business models is not confined to times of crisis i.e. the economic recession, but needs to be under continued evaluation and development in order to maximise potential. Established packaging manufacturers are seeing more and more opportunities within the emerging markets and gaining a long-lasting position is vital.

7.1.2 The Threat of Substitution

Visiongain: What challenges and opportunities do you expect to present themselves for paper/board packaging manufacturers over the coming decade?

Spokesperson: A key challenge to the paper packaging industry is the investment and rapid development of biodegradable plastic packaging. In order to compete, it is imperative paper packaging manufacturers can source from timber sustainably. Opportunities for paper packaging exist in the expanding emerging markets where demand is continuously growing. New application and substitution is possible where consumer knowledge of sustainability is growing. The strength of paper packaging in the mature markets will ensure steady growth for those that continue to develop their products.

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8.1 Boise, Inc

- **Headquarters:** Boise, Idaho, United States
- **Employees:** 4,100
- **Revenues:** \$2.1bn

Headquartered in Boise, Idaho, the company manufactures paper and packaging products. These include papers used for communication, such as office papers, commercial printing papers, envelopes, forms, and newsprint, as well as papers that are associated with packaging, including label and release and flexible papers used for food wrap and other applications. Boise, Inc also manufactures linerboard and corrugating medium, which are combined to make containerboard, the base raw material for corrugated sheets and containers. Boise Inc manufactures from five paper mills, five corrugated products plants, a corrugated sheet feeder, a corrugated sheet plant, two distribution facilities, and a transportation business.

8.2 Cascades Inc.

- **Headquarters:** Kingsey Falls, Quebec, Canada
- **Employees:** 12,500
- **Revenues:** \$3.2bn

Founded in 1964, Cascades produces, converts and markets packaging and tissue products composed mainly of recycled fibres. Cascades employs close to 12,500 people in more than 100 modern, versatile operating units in North America and Europe. The company provides coated recycled boxboards for conversion into folding cartons and micro-flute packaging for food and consumer products; containerboards and corrugated products for the food, beverage, and consumer products industries. It also supplies industrial packaging products, including roll headers and paperboard packaging, laminated boards, heat plates for sealing roll edges, honeycomb paperboards, uncoated boards, headers and wrappers, and spacers and partitions to package products, as well as offers graphic art and printing plate services.

Cascades Inc. sells its products primarily in Canada, the United States, and Europe. The company also provides consumer product packaging products, such as moulded pulp products, filler flats, and trays and specialty packaging products for poultry farms and the restaurant businesses; and multi-use containers and wrappers for packaging coins, as well as offers Kraft paper. Cascades Inc. was