

Pulp, Paper & Packaging Groups - World

Market Analysis – 2016-2020 Trends – Corporate Strategies

Publication date: May 2016

Exclusive extracts from this 232-page-long report:

- **What is the business?**

This report analyses the leading manufacturing companies in the pulp, paper and packaging industry. This industry encompasses a wide range of products, which can be divided into five main groups: pulp, graphic paper (e.g. newsprint, magazine, printing and writing paper), packaging (e.g. containerboard, coated paper), hygiene (e.g. toilet paper, diapers, hygiene pads) and wood products (e.g. plywood). [...]

- **Who are the key players?**

The world's largest paper groups are based in mature markets in Europe, the US and Japan. Large paper producers such as International Paper, SCA or Oji are vertically integrated, which allows them to achieve costs reduction and optimise production in line with changing demand. Companies operating only in the upstream segment showed higher margins, but their revenues were far from the downstream sector groups. As such, Fibria, the world's leading pulp producer, showed annual net sales of €2.73 billion in 2015, which was seven times lower than the revenues of the world's leading paper manufacturer International Paper in the same year (€20.16 billion). [...]

Companies analysed in the report include: **International Paper, Kimberly-Clark, Svenska Cellulosa, WestRock, UPM-Kymmene, Stora Enso, Oji Holdings, Smurfit Kappa, Weyerhaeuser, Sappi, Nine Dragons and Fibria.**

- **How intense is competition?**

Competitive rivalry in the pulp, paper and packaging industry is intense and no single company dominates the market. Paper groups are highly dependent on changing consumption patterns without having the possibility of significantly influencing prices due to the high price sensitivity of end consumers. [...]

- **What are the main markets?**

Global paper demand is expected to grow over the coming years. Paper consumption per capita is high in mature economies such as North America and Western Europe, while emerging markets are still not saturated. Growth in paper demand will therefore reside mostly in the developing countries of Asia and Eastern Europe, while consumption in mature economies is projected to decrease. [...]

To find out more on the sector and its leading corporations, please find enclosed the order form to obtain this exclusive report by Xerfi Global.

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