

# The Future of Paper and Print in Europe 2008 - 2020

## Seismic Shift or Changing Patterns?

In the last quarter of the 20th Century, analysts were predicting conflicting outlooks for the graphic paper sector. The impact of new technology was expected to drive down volumes while some argued new media would provide a compensating boost. The reality was that during that period little changed!

At the end of the first decade of the 21st Century deeper-rooted changes in demand patterns in the graphic paper marketplace are now evident. The future for paper and print will certainly be a challenging one!

This independent study takes a pragmatic and realistic view of demand for print and graphic paper grades in Western Europe through to 2020.

## Vital issues are addressed in this independent report

Commissioned and published by The Stationers' and Newspaper Makers' Company, this authoritative and independent report identifies and analyses the key trends influencing future demand for paper:

- Rapid advances in technology – can print and paper compete with digital and pixels?
- Changes in the demographic profile of Western Europe markets - will generation 'Y' be the first that prefers pixels to paper?
- Concerns for the environment - will 'ecology' issues drive users away from paper?
- New printing technology – can it save the industry and will conventional printing processes survive?

## Who will benefit from the report findings?

The report is aimed at everyone connected with the paper and media industry especially those involved with strategic planning or considering long term opportunities.

Users of this report and its forecast models will come from all sectors of the industry:

Paper and pulp manufacturers, sales offices and traders • Paper machine and parts producers • Paper merchants • Ink and print consumable manufacturers • Printing machinery manufacturers • Newspaper, magazine and book publishers • Traditional and digital based printers • Pre and post-press companies • Advertising and design agencies • Digital media content creators and suppliers • Print buyers • Print management providers • Direct Marketing agencies • Retailers in traditional and catalogue channels • Directory publishers • Waste paper industry • Financial Institutions

## General enquiries, media enquiries and further information:

Contact the Business Development Director at The Stationers' Company:  
Email: [simon@stationers.org](mailto:simon@stationers.org), Tel: +44 207 246 2510.



*“Deep-seated changes in the pattern of demand for paper will require strategic decisions with far-reaching consequences”*

### Report Contributors:

**Researched and written by:**  
Richard Harris of NLK Associates.

**Industry participants:**  
PaperlinX; Sun Chemical;  
UPM-Kymmene; PPA;  
The Stationers' Company.

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### Available in hard copy from:

The Stationers' Company  
Stationers' Hall, Ave Maria Lane  
London, EC4M 7DD  
United Kingdom.  
T: +44 (0)207 248 2934



The Stationers' and Newspaper Makers' Company

## Report Contents:

Geographically the report will address the changes, influences and trends impacting the graphic paper market in Western European countries.

The paper sectors analysed include newsprint, uncoated and coated mechanical and woodfree papers used in newspapers, magazines, book publishing, advertising and commercial print and business papers and print.

Designed to meet both the needs of busy executives concerned with the key findings and analysts seeking detailed information, the report is presented in two parts.

### Part 1: Summary and key findings

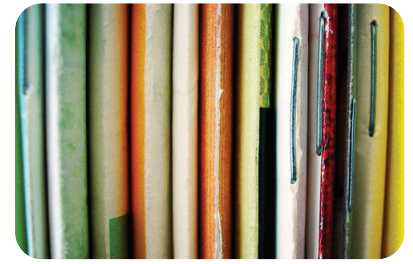
- Summary of recent historic trends
- Key issues and drivers impacting future demand
- Outlook to 2020 by market and paper grade
- Implications for the Supply Chain

### Part 2: Detailed Market Analysis and Forecasts

This section contains the detailed data and analysis used to prepare the report summaries, forecasts and findings.

The data tables and charts included cover in depth the following:

- Recent trends in demand
  - Trend data from 1995 and developing patterns of consumption by grade
- The key influences on future demand patterns
  - Economic, demographic and other issues
  - Developments in media, other communications and business
  - Developments in printing technology
  - Developments in paper (substrate) technology
  - Environmental issues
  - Supply issues – availability of paper and the impact of trade issues on print production in Europe
- Future developments by market and paper grade
  - The 2020 outlook for each end use
- Forecasts
  - Impact analysis, forecasting assumptions and forecasts to 2020 by end use and paper grade



**“Pixels are replacing print – to survive, the industry must find applications where print can still compete effectively”**



**“By 2020, total demand for graphic papers will have fallen back to the levels of the early nineties”**

#### Obtaining the Report:

Available as an Encrypted PDF via The Stationers' Company website: [www.stationers.org](http://www.stationers.org) or on application with payment to **The Stationers' Company, Stationers' Hall, Ave Maria Lane, London, EC4M 7DD, UK.**

#### Preferential rate for PPA members only:

Encrypted PDF download **£600 + VAT** at the standard rate

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#### Additional items:

Downloadable PowerPoint Screen Show presentation supplement to main report: **£50 + VAT** at the standard rate

Downloadable Excel forecast model: **£150 + VAT** at the standard rate