HAWKINS WRIGHT

The Outlook for Market Pulp

Supply, Demand, Costs and Prices

A multi-client service

The Outlook for Market Pulp

Demand, Supply, Costs and Prices

The scope of the service

The Outlook for Market Pulp service was launched in 1984. It is now established as a vital planning tool for any company or organisation that requires access to the most authoritative analysis of the market pulp sector. Because this programme of research has continued without interruption for many years, Hawkins Wright has been able to develop an extensive bank of data, experience and contacts.

Over ninety organisations regularly support The Outlook service. These include pulp producers — who together account for 90% of world supply — buyers, international agents and trading houses, state and provincial governments and financial institutions.

The Outlook service comprises:

- **Three main reports** published in March, July and November, containing detailed supply, demand and price analyses and five-year forecasts. (The July report also contains the results of Hawkins Wright's unique Cost Survey.) The reports are distributed as electronic and hard copies.
- **Three interim forecast updates**, published in January, May and September. Taken together with the main reports, these updates allow the key forecast data and assumptions – in particular the price forecast – to be updated every two months. Distributed electronically.
- Hawkins Wright's **response to any questions** that the subscriber may have on matters relating to the international pulp and paper market throughout the year. In this way Hawkins Wright can be used as a virtual extension of the subscriber's own marketing or market research department.
- **A personal presentation**: it will usually be possible for a Hawkins Wright consultant to meet with each client at least once a year to make a presentation on market developments.

The contents of a typical Outlook report is shown on the following pages.

The contents of a typical report

Section One
Market pulp demand
Current demand
- *Softwood demand*
- *Hardwood demand*

Demand-side substitution
- *Near term*
- *Long term*

Forecast demand

Section Two
Market pulp supply
Current market pulp capacity
Short-term or temporary changes in supply
Capacity closures
Leading market suppliers
Confirmed changes to capacity
- *Softwood expansion projects*
- *Hardwood expansion projects*
- *BCTMP expansion projects*

Unfinanced or unconfirmed changes to capacity
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- *Asian hardwood kraft*
- *High yield pulp*
- *Softwood kraft*
- *Non-wood*

Section Three
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Long term supply demand projections
The short-term supply and demand outlook

Section Four
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Wood supply
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- *Europe*

Production cost survey
- *Bleached softwood kraft*
- *Bleached hardwood kraft*
- *Supply cost curves*

Section Five
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- *Commodity prices*
- *Energy prices*

Printing & writing paper markets
- *North America*
- *West Europe*
- *China*
- *South Korea*

Tissue markets
Regional price differentials
Price forecast
- *Baseline assumptions*
- *Key forecast risks*

Section Six
Regional demand analysis
Regional analysis of demand
- *Tied or captive shipments*
- *North America*
- *Nordic*
- *West Europe*
- *East Europe*
- *Latin America*
- *Oceania*
- *Japan*
- *China and other Asia*

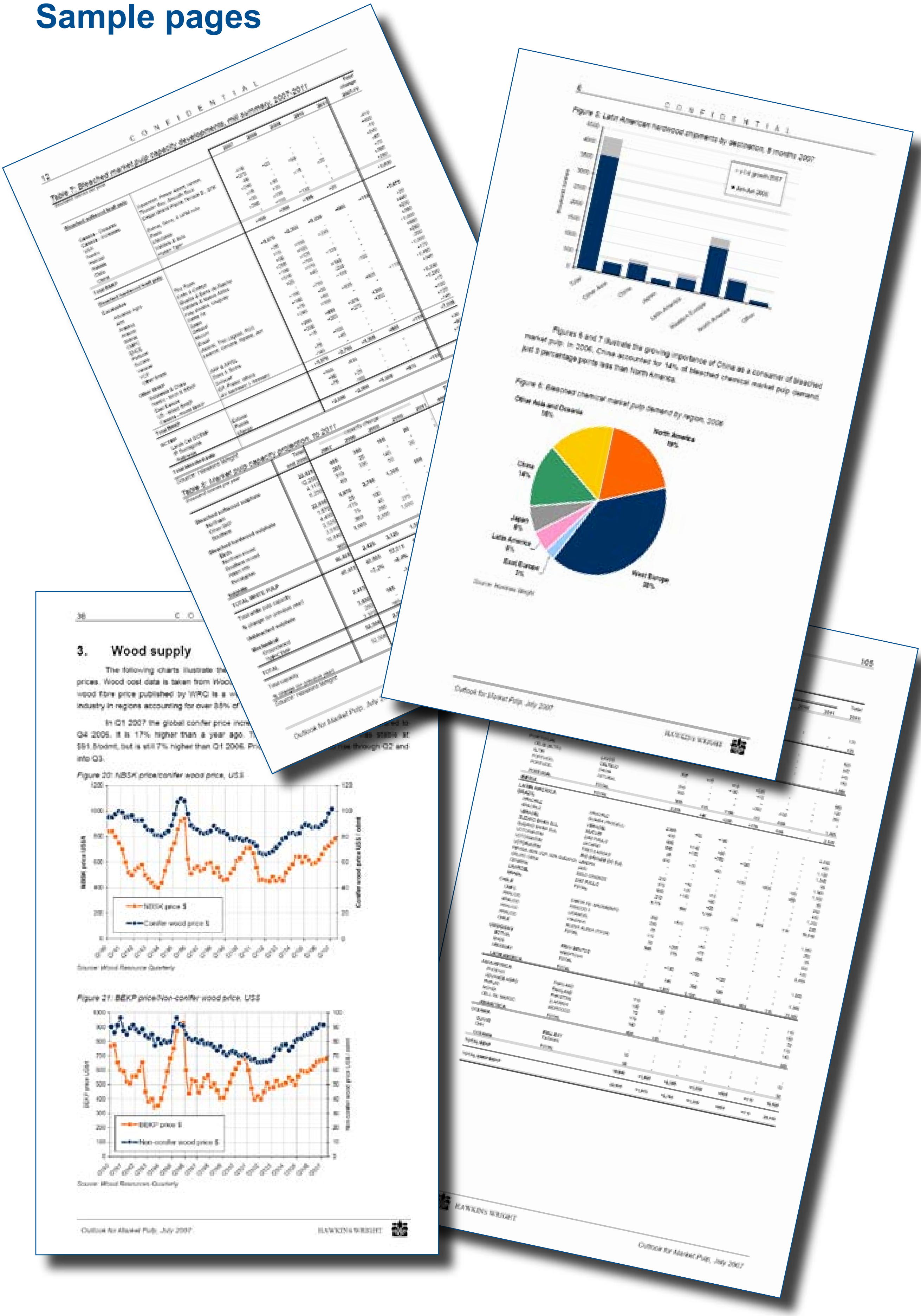
Appendix 1:
Mill-by-mill capacity listing and projection
- *NBSK*
- *Southern softwood kraft*
- *Radiata and other softwood kraft*
- *Northern hardwood kraft*
- *Southern hardwood kraft*
- *Eucalyptus kraft*
- *Asian BHKP (incl. Acacia)*
- *High-yield (incl. BCTMP)*
- *Unbleached kraft*
- *Sulphite*

Appendix 2:
Forecast regional demand by grade of pulp

List of tables in a typical report

List of figures in a typical report

Sample pages



The experience of Hawkins Wright

Hawkins Wright is a business consultancy based in London, UK, specialising in the provision of consultancy and business information services to the international forest products industry. The company was formed in 1982.

In addition to *The Outlook for Market Pulp* our regular multi-client services include *Defining the China Market,* (an annual study which segments and plots the development of the Chinese pulp, paper & board industry) and *Pulpwatch* (a monthly newsletter and website covering developments in the international pulp market).

In addition to these regular reports we provide single-client consultancy services for individual clients covering the full range of marketing and strategic topics.

Visit ***www.hawkinswright.com*** for more information on these and other services.

Availability and cost

An annual subscription to the *Outlook for Market Pulp* service costs **£4,750**.

The price includes hardcopies of the three main reports; electronic copies of the three interim reports; Hawkins Wrights responses to any (within reason) questions on pulp & paper markets that may arise during the year; and one or more presentation meetings with one of our consultants.

(Such meetings are normally arranged to coincide with major industry events – for example London Pulp Week or MPA – or when a consultant is travelling in the region. However, for specially arranged meetings we reserve the right to charge travel and subsistence costs. Such costs will always be agreed in advance.)

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The Outlook for Market Pulp

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