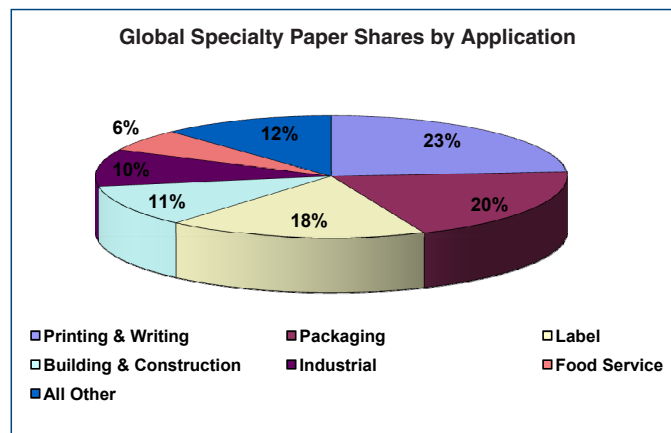


### NEW STUDY: A detailed analysis of the growing food service paper sector with focus on barriers and opportunities facing potential entrants

Expansion of the quick service restaurant industry has fueled increasing demands for specialty papers in the food service sector.

The specialty papers sector has attracted the attention and interest of many commodity paper producers. This growing market offers producers potential for long term stability and attractive product pricing. Those who have seen demand drop precipitously for their existing products have shown particular interest.

RISI's *Specialty Food Service Papers 2013* analyzes a variety of important factors including: market demand, product requirements and trends of the growing food service paper sector. Focusing on paper basis weights only, this study examines global usage of key specialty grades ranging from extremely light papers for wrapping to highly specialized grease and heat resistant parchment and filter grades.



### For those considering entering this market:

Using market research and cost benchmarking data for 60 key producing mills, the study identifies and addresses critical issues involved in entering this market sector, such as:

- Market size and trends facing the growing food service paper sector
- Key paper mills and producers with cost benchmarking data for 60 key producing mills
- Regional and global converters and distributors active in the specialty food service papers sector
- Barriers for mills considering production of food service grades
- Specific end-use product applications
- New raw material developments that will help paper producers compete
- International trade trends

## Who will benefit from this study?

### Specialty Mills

- Compare your costs to your competitors.
- Understand why certain mills operate at lower costs, while others operate at higher costs and could be at risk of closure in response to market pressures.
- See capacities by machine at competing mills within the market.

### Non-Specialty Mills with Underutilized or Idle Machines

- Understand the barriers to enter this market.
- Identify the equipment/process qualifications needed for your mill to be competitive producing these grades.
- Explore whether a conversion would be profitable given the cost and profits realized by existing mills in this sector.
- Analyze the future profit potential of the market.

### Buyers of Specialty Food Service Paper Grades

- Identify the capacities of products being produced by mills in regions near your facilities.
- Analyze the cost competitiveness of existing and potential suppliers to determine which are likely to offer you the most competitive prices for the grades you buy.
- Understand the competitive landscape to determine which grades are best for your needs based on cost and market trends.
- Negotiate new contracts from an informed position.

### Suppliers to Specialty Mills

- Determine new prospective customers based on geographic location, equipment, capacity and other key data points.
- Discover opportunities to supply higher quality raw materials and improved processing capabilities based on sustainability and product materials' health risk concerns.
- Identify mills with lower operating costs that are best positioned for long-term contracts.
- Understand the competitive pressures of mills with high-operating costs in order to better communicate how your products and services can benefit them.
- Negotiate new contracts from an informed position.

### Financial Institutions/Industry Associations/Government Agencies

- Analyze the risk associated with investments in these mills.
- Identify barriers to entry in order to better understand the long-term profitability potential of mills/converters trying to enter the market.
- Assess the current state of the market and forecasted expectations.

## Preliminary Table of Contents:

### I. Executive Summary

### II. Overview

- Purpose
- Methodology
- Geography (global with regional shares)
- Definitions
  - o What are food service papers?
  - o Other important definitions

### III. Markets

- Market Overview
- Grades and Applications
  - o Identification of food service grades
  - o Applications
  - o Qualities
- The Value Chain
- Demand by Application & Region
- Trends by Region
  - o Market

- o Mergers and Acquisitions
- o Processes and Products
- o Sustainability/Environmental
- o Raw Material Developments
- Projections 2013 through 2016
- Role of Trade in the Global Market
- Opportunities and Threats

### IV. Important Producers by Region

- Identification
- Applications Served
- Capabilities (MF, MG, Coating, parchmentizing, basis weight range?)
- Capacities (for food service in total by mill)

### V. Important Converters and Distributors by Region

### VI. Potential Producers of Food Service Papers

### VII. Barriers to Market Entry for Producers

### VIII. Benchmarking of Important Producers

## Study Authors



### Jonathan Rager

Vice President, Mill Intelligence, RISI

A 20+ year veteran of the forest products industry, Jon works out of RISI's Atlanta office leading the global team of engineers and analysts who comprise the Mill Intelligence Services division. Jon was previously at Pöyry Management Consulting where he managed a technical strategy practice area. He has also worked in the corporate lending sector at GE Capital to provide financing to companies in this industry. Earlier in his career Jon held various process engineering and operations roles with several pulp and paper producers. He has a bachelor's degree in Chemical Engineering with honors from The Pennsylvania State University.



### William Studstill

Director, Graphic Paper, RISI

William conducts competitive cost studies of global pulp and paper mills producing graphic papers, including coated and uncoated, woodfree and mechanical grades. In addition, William conducts single-client and multi-client cost benchmarking studies, as well as consulting projects which include due diligence, strategic assessment and mill optimization studies.



### Michael Jones

Director, Packaging and Tissue, RISI

Michael conducts competitive cost studies of global pulp and paper mills producing containerboard, cartonboard, tissue, market pulp, fluff pulp and dissolving pulp. In addition, Michael conducts single-client and multi-client cost benchmarking studies, as well as consulting projects which include due diligence, strategic assessment and mill optimization studies.



### Leading Industry Consultant

A leading expert in the specialty market contributed to this study. Due to his involvement in current consulting projects, he has chosen to remain anonymous. He has over 40 years of industry experience. His background in engineering, product development, project management and consulting offers unique insight into the specialty papers market. He has assisted with in-mill conversions to specialty papers, market development, technical development, and market analyses of numerous specialty grades, such as printing, packaging, label, metalizing, food service, artist papers, decorate laminate papers, and more. He has also authored numerous studies on specialty papers.

## TO ORDER

### In North America:

John McAvoy  
781.734.8987  
jmcavoy@risi.com

### Rest of World:

Angelos Kalkanteras  
+32.2.536.07.71  
akalkanteras@risi.com

**MAIL:** RISI  
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Bedford MA 01730  
USA

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## Order Form

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