

# The 2022-2027 Outlook for Paper and Allied Products in Japan

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## Abstracts

This study covers the latent demand outlook for paper and allied products across the prefectures and cities of Japan. Latent demand (in millions of U.S. dollars), or potential industry earnings (P.I.E.) estimates are given across over 1,000 cities in Japan. For each city in question, the percent share the city is of its prefecture and of Japan as a whole is reported. These comparative benchmarks allow the reader to quickly gauge a city vis-à-vis others. This statistical approach can prove very useful to distribution and/or sales force strategies. Using econometric models which project fundamental economic dynamics within each prefecture and city, latent demand estimates are created for paper and allied products. This report does not discuss the specific players in the market serving the latent demand, nor specific details at the product level. The study also does not consider short-term cyclicalities that might affect realized sales. The study, therefore, is strategic in nature, taking an aggregate and long-run view, irrespective of the players or products involved.

This study covers paper and allied products as defined by the North American Industrial Classification system or NAICS (pronounced "nakes").

The NAICS code for paper and allied products is 322. It is for this definition that aggregate latent demand estimates are derived. Paper and allied products is specifically defined as follows:

322 Industries in the Paper Manufacturing subsector make pulp, paper, or converted paper products. The manufacturing of these products is grouped together because they constitute a series of vertically connected processes. More than one is often carried out in a single establishment. There are essentially three activities. The manufacturing of pulp involves separating the cellulose fibers from other impurities in wood or used

paper. The manufacturing of paper involves matting these fibers into a sheet. Converted paper products are made from paper and other materials by various cutting and shaping techniques and includes coating and laminating activities. The Paper Manufacturing subsector is subdivided into two industry groups, the first for the manufacturing of pulp and paper and the second for the manufacturing of converted paper products. Paper making is treated as the core activity of the subsector. Therefore, any establishment that makes paper (including paperboard), either alone or in combination with pulp manufacturing or paper converting, is classified as a paper or paperboard mill. Establishments that make pulp without making paper are classified as pulp mills. Pulp mills, paper mills and paperboard mills comprise the first industry group. Establishments that make products from purchased paper and other materials make up the second industry group, Converted Paper Product Manufacturing. This general activity is then subdivided based, for the most part, on process distinctions. Paperboard container manufacturing uses corrugating, cutting, and shaping machinery to form paperboard into containers. Paper bag and coated and treated paper manufacturing establishments cut and coat paper and foil. Stationery product manufacturing establishments make a variety of paper products used for writing, filing, and similar applications. Other converted paper product manufacturing includes, in particular, the conversion of sanitary paper stock into such things as tissue paper and disposable diapers. An important process used in the Paper Bag and Coated and Treated Paper Manufacturing industry is lamination, often combined with coating. Lamination and coating makes a composite material with improved properties of strength, impermeability, and so on. The laminated materials may be paper, metal foil, or plastics film. While paper is often one of the components, it is not always. Lamination of plastics film to plastics film is classified in the NAICS Subsector 326, Plastics and Rubber Products Manufacturing, because establishments that do this often first make the film. The same situation holds with respect to bags. The manufacturing of bags from plastics only, whether or not laminated, is classified in Subsector 326, Plastics and Rubber Products Manufacturing, but all other bag manufacturing is classified in this subsector. Excluded from this subsector are photosensitive papers. These papers are chemically treated and are classified in Industry 32599, All Other Chemical Product and Preparation Manufacturing.

3221 This industry group comprises establishments primarily engaged in manufacturing pulp, paper, or paperboard.

3222 This industry group comprises establishments primarily engaged in converting paper or paperboard without manufacturing paper or paperboard.

32211 See industry description for 322110.

32212 This industry comprises establishments primarily engaged in manufacturing paper from pulp. These establishments may manufacture or purchase pulp. In addition, the establishments may convert the paper they make. The activity of making paper classifies an establishment into this industry regardless of the output.

32213 See industry description for 322130.

32221 This industry comprises establishments primarily engaged in converting paperboard into containers without manufacturing paperboard. These establishments use corrugating, cutting, and shaping machinery to form paperboard into containers. Products made by these establishments include boxes; corrugated sheets, pads, and pallets; paper dishes; and fiber drums and reels.

32222 This industry comprises establishments primarily engaged in one or more of the following: (1) cutting and coating paper and paperboard; (2) cutting and laminating paper and paperboard and other flexible materials (except plastics film to plastics film); (3) manufacturing bags or multiwall bags or sacks of paper, metal foil, coated paper, or laminates or coated combinations of paper and foil with plastics film; (4) manufacturing laminated aluminum and other converted metal foils from purchased foils; and (5) surface coating paper or paperboard.

32223 This industry comprises establishments primarily engaged in converting paper or paperboard into products used for writing, filing, art work, and similar applications.

32229 This industry comprises establishments primarily engaged in (1) converting paper and paperboard into products (except containers, bags, coated and treated paper and paperboard, and stationery products), or (2) converting pulp into pulp products, such as disposable diapers, or molded pulp egg cartons, food trays, and dishes. Processes used include laminating or lining purchased paper or paperboard.

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