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BIOGRAPHY

Martin Glass, MSc. is a leading market research consultant in the Paper Industry, specialising in coated and uncoated paper markets and he is head of the Market Consulting firm EMGE & Co. Ltd.

Martin worked for over ten years with English China Clays, in the Corporate Planning and Market Planning Departments. At ECC, Martin was in charge of the Group's planning activities in the Paper Industry, which included market forecasts and the large competitor/product database. In 1988, he left ECC to join the consulting firm Hawkins Wright as Senior Partner. In 1994, he formed the independent consulting company EMGE & Co.

EMGE & Co. has become one of the leading market consultants to the World Paper Industry, specialising in forecasts and market research, as well as a full range of private client research services. EMGE & Co. performs market research projects including the EMGE World Graphic Papers Report, EMGE European Woodfree Paper Market Forecasts and the annual EMGE Cut Size Mill and Mill Brand Survey.

Martin has a Masters degree (M.Sc.) in Operational Research from the University of Birmingham and a Bachelor of Science degree (B.Sc. Hons) from Southampton University, UK. Martin is a regular speaker at Paper Industry conferences and is currently a director of PRIMA (the Paper and Related Industries Marketing Association).

ABSTRACT

PAPER MARKET OUTLOOK AND FORECAST

As an introduction to the conference, this presentation will provide an overview of the prospects for the Cut-Size Office Paper markets. In particular, the trends and outlook for market demand, trade, capacity and operating rates will be examined, together with structure of supply, competition, globalisation and industry consolidation.

The markets in Europe and North America have matured, while growth opportunities remain in many other world regions. Moreover, office paper usage and technologies are taking new paths and the structure of the market is becoming more complex in many ways.

In order to understand the future development of paper demand it will be necessary to update the market outlook and take a fresh look at the issues facing the industry.