



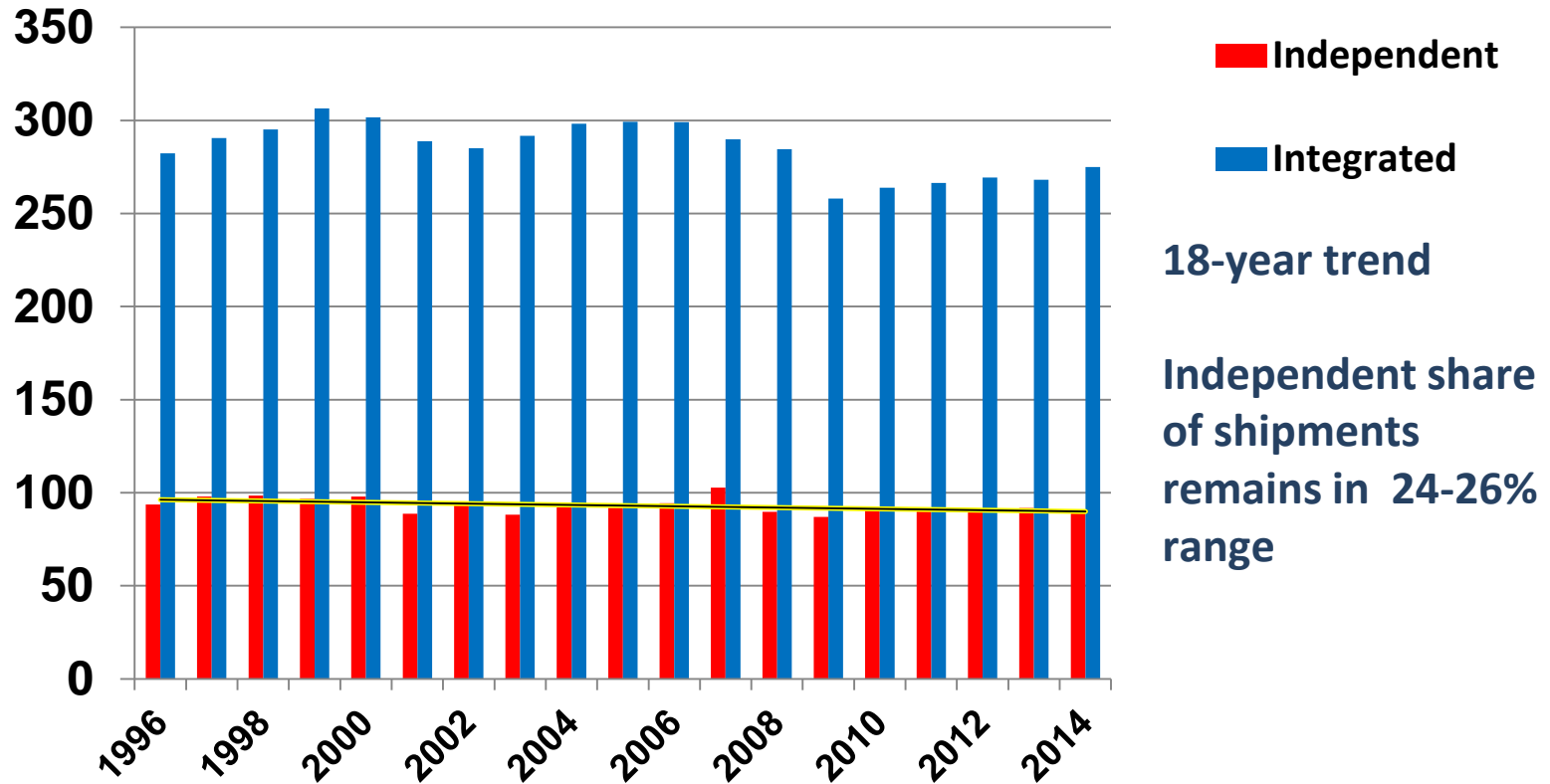
# WELCOME AICC Mexico

JW Marriott Cancun  
Cancun, Mexico

# US Independent Sector

- Privately held
- Family businesses
- Avg sales, 2014
  - Corrugator Plants: \$67 million
  - Sheet Plants: \$19 million
- Avg shipments, 2014
  - Corrugator Plants: 693 million sq ft.
  - Sheet Plants: 158 million sq ft

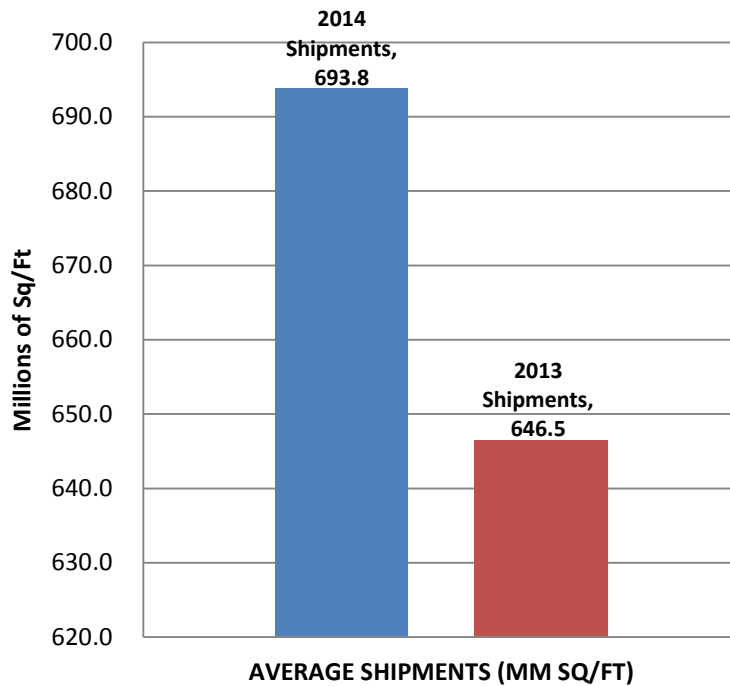
# Market Share (BSF of Shipments)



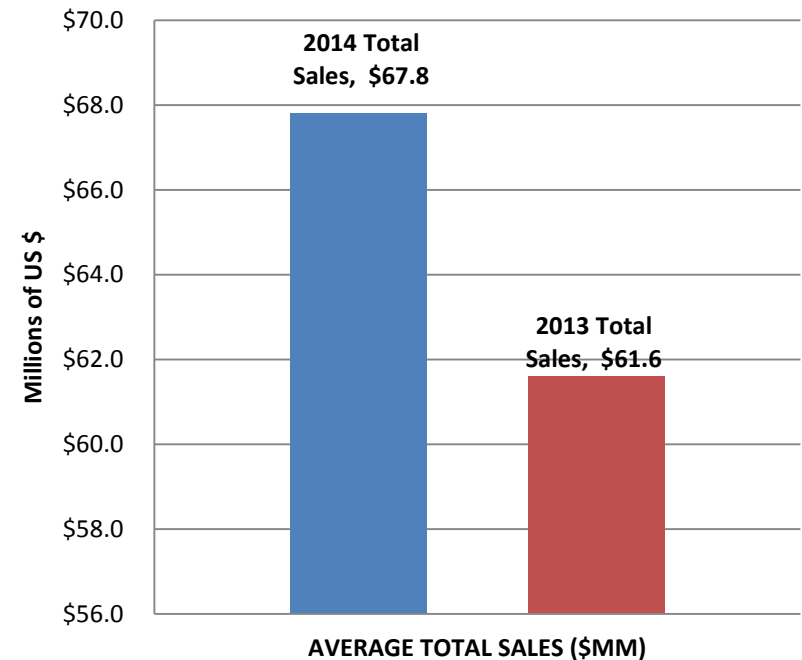
Source: Fibre Box Association 2014 Annual Report

# US Independent Sector Shipments & Sales/Corrugators

## Average Shipments



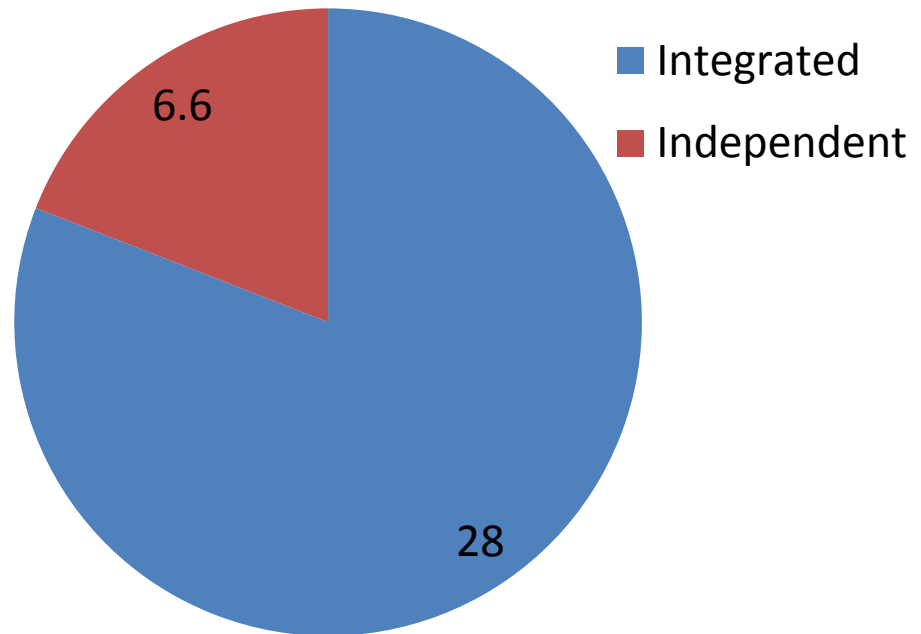
## Average Sales



# US Independent Sector

## Tons of Containerboard Consumed

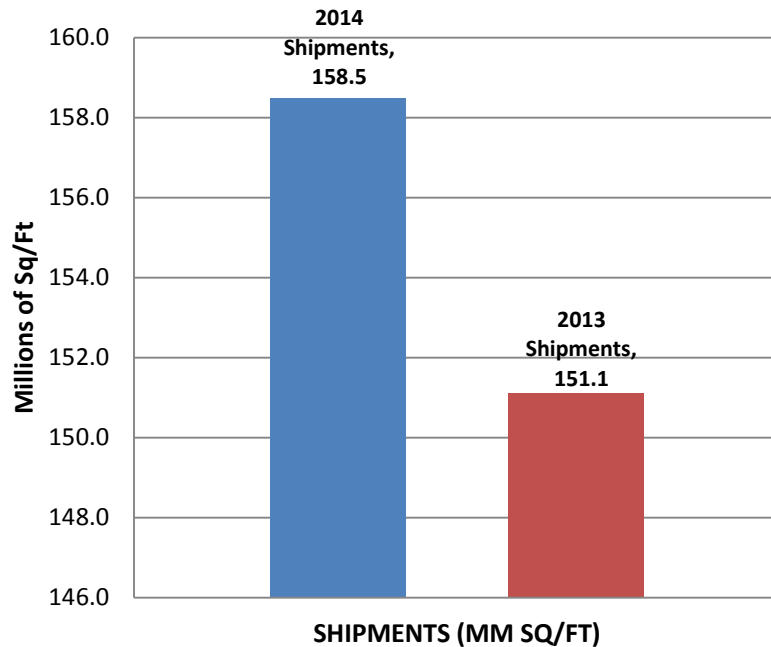
- 3,000 tons/month
- 6 millions ton/year
- ~20% of annual domestic c'board output



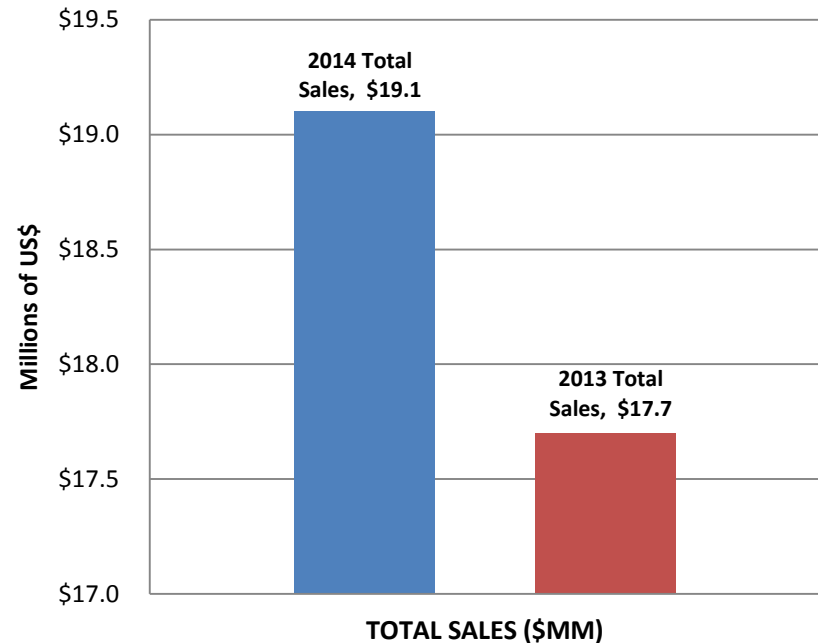
Source: AICC, American Forest & Paper Assn.

# US Independent Sector Shipments & Sales/Sheet Plants

## Sheet Plant Average Shipments



## Sheet Plant Average Total Sales



# Acquisitions (partial list) since 2013

BUYER	CONVERTING ASSETS
Menasha	PearceWellwood
New-Indy	Carolina Container
Smurfit Kappa	Brian Thomas Display
Smurfit Kappa	Bates Container
Green Bay Packaging	Midland Container
Liberty	Harbor Packaging
Pratt	Triad Packaging
Rand Whitney	Horn Packaging
Hood Container	Stronghaven
Norampac	Maritime Paper Products
US Corrugated	Louisiana Corrugated
Welch Packaging	American Packaging

BUYER	CONVERTING ASSETS
New-Indy	Ivex
Hood Container	Micon
G-P	LA CORR
Atlantic Packaging	Skybox
Crown Paper Group	Montebello
Pratt	Robert Mann
Smurfit Kappa	Sound Packaging
G-P	Excel Displays
Smurfit Kappa	Empire Packaging & Display
Buckeye Corrugated	Drake Container
Liberty	Omaha Box
Smurfit Kappa	Scope Packaging
Pratt	Minnesota Corrugated

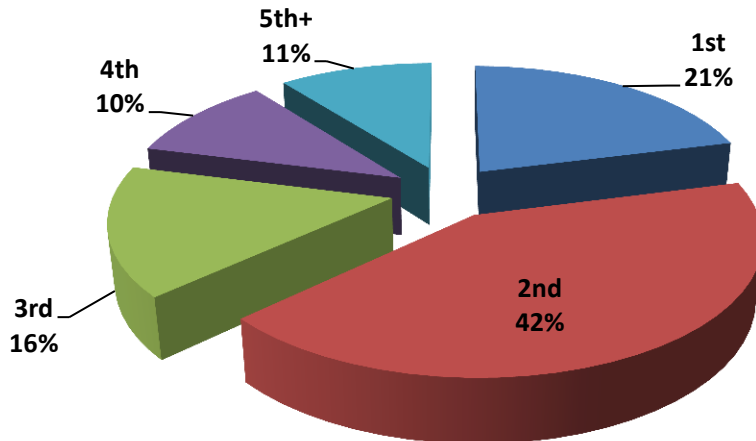
Sources: *RISI, Ralph Young, ryoung@aiccbox.org*

# Demographics

## Corrugator Plants

- 62% first/second generation
- 37% third, fourth +
- Average age of company: 67 Yrs.

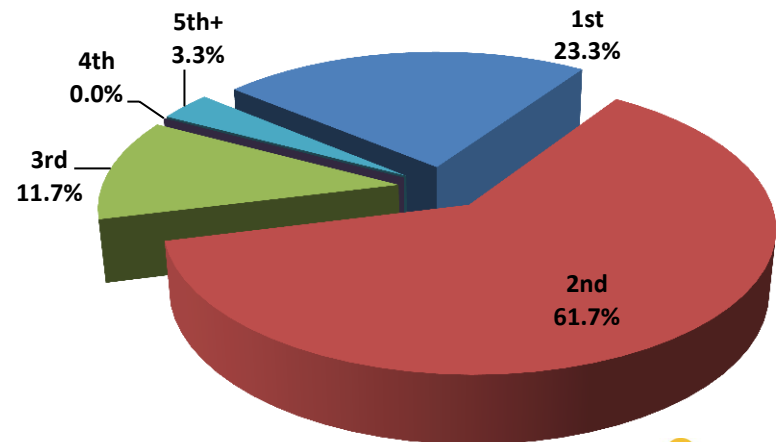
GENERATION BREAKOUT



## Sheet Plants

- 85% first/second generation
- Average age of company: 43 Yrs.

GENERATION BREAKOUT





# What are we doing?

- AICC focus on leadership and professionalism in owning/operating a profitable business
- Encouraging next generation participation and “onboarding” in the company and the industry
- Educational sessions at national and regional meetings, including “Ready, Aim, Win!”
- AICC strategic destination model in development for 2019

# Upcoming Programs

- Emerging Leaders Field Trip, 6/21-23, Richmond Corrugated, Richmond, Va.
- Regions 2, 5, 8/9, in August/September
- UK Sheet Plant Assn Meeting, 9/20-21, Birmingham, UK
- SuperCorrExpo, 10/17-20, Orlando



THE INDEPENDENT PACKAGING ASSOCIATION

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