



Center for Paper Business and Industry Studies

Newsletter of the Center for Paper Business and Industry Studies

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Jacksonville CPBIS Sessions Give Attendees Much Food for Thought

Under the leadership of Colleen Walker (associate director, industry liaison), CPBIS contributed three sessions to the 2007 TAPPI Papermakers & PIMA International Leadership Conference, held in Jacksonville, FL at the Hyatt Regency Jacksonville Waterfront, March 11-15. The program, which consisted of presentations by both CPBIS researchers and invited speakers, was as follows:

Trends in Digital Printing

“Empirical Studies on the Digital Printing Industry in the USA and Canada,” Benjamin Jonen, School of Economics, Georgia Tech

“Competition and Turnover in the Digital and Quick Printing Industries,” Minjae Song, School of Economics, Georgia Tech

“Identification of Trends in Papers for Digital Printing,” David White, IPST; Mary Anne Evans, Rochester Institute of Technology (RIT); Howard Vogl, RIT; and Gary Peter, University of Florida

Innovation: The Key to Industry Competitiveness

“A Few Observations About Innovation,” Glenn Ostle, Editorial Director, Paper 360° Magazine

“Innovation for Competitive Advantage in Manufacturing,” Randal Karg, Sinclair Group

“The Innovation Imperative,” Dan Cenatempo, Value Resolution Group; Jacqueline McNutt, CPBIS; and Bob Kinstrey, Jacobs Engineering Group

Trends and Issues in Emerging Markets

“Paper and Board Emerging Market Overview on India and Turkey,” Soile Kilpi, Pöyry Forest Industry Consulting

“Pulp and Paper Industry in China: Current Status, Trends and Implications for International Producers,” Haizheng Li, School of Economics, Georgia Tech

The above presentations will soon be available for viewing on the CPBIS Web site, www.cpbis.gatech.edu

Kilpi: India, Turkey Offer Attractive Opportunities for Paper Producers

Soile Kilpi’s Jacksonville presentation laid out, in considerable detail, reasons for pulp and paper producers contemplating future strategic moves to take a close look at these two countries.

She began by emphasizing the disparities in anticipated market growth rates between the developed and developing countries. Over the period 2005-2020 the anticipated average annual demand growth in the developed countries of North America, Western Europe and Japan is only 0.5%. This is in sharp contrast to the corresponding figure of 3.5% for non-Japan Asia, where demand will grow in response to urbanization and increases in both population and GDP. Over 60% of incremental production is forecast to be in non-Japan Asia over the next 15 years.

Within Asia, China is not the only “hot spot” of remarkable market growth. Notable among the others are India and Turkey. In India, for example, demand is expected to grow at an average annual rate of 5.8% between now and 2020. GDP is growing at an average annual rate of 7% and the government has reduced controls on foreign trade and investment. The literacy rate is 60% and the labor force is greater than 500 million. Turkey, with a labor force of 25 million and a literacy rate of 87%, has one of the world’s fastest growing economies. Turkey has gradually opened up its markets through economic reforms such as reducing

government controls on foreign trade and investment and privatization. In both countries, low consolidation provides attractive market entry opportunities, especially in India. Exports to Turkey from high cost efficiency locations could provide an attractive entry opportunity.

Ms. Kilpi may be contacted at soile.kilpi@poyry.com

Jacquelyn McNutt Injured in Accident

Jacquelyn McNutt, CPBIS executive director, was injured in a car accident on April 9. She successfully underwent neck surgery following the accident and is now on the mend, though she will be sidelined for at least four to six weeks. All of us at CPBIS extend to her our best wishes for a speedy recovery.

Georgia Tech Graduate Programs Ranked Among Finest in Nation

The graduate programs of CPBIS host institution Georgia Tech have again been ranked among the finest in the country by U.S. News and World Report in its annual

survey, "America's Best Graduate Schools." Tech's College of Management is this year ranked 25th among the nation's hundreds of business schools. Among business schools at public universities, it is ranked 10th. The College of Engineering is ranked fourth in the nation, with nine of its programs listed in the top ten. Notable among these is industrial and systems engineering, considered the best such program in the country for the 17th consecutive year.

Upcoming Events

CPBIS-PIMA Management Development Program, "**Management Development for Enhanced Performance,**" Global Learning Center, Georgia Tech, June 4-8, 2007.

2007 CPBIS/IPST Technobusiness Forum, "**New Horizons in Enterprise Transformation,**" September 25-26, Georgia Tech Hotel & Conference Center, Atlanta, Georgia ■

