



Center for Paper Business and Industry Studies

Newsletter of the Center for Paper Business and Industry Studies
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The North American Pulp and Paper Industry: Condition and Prognosis

CPBIS executive director Jacquelyn-Danielle McNutt will be the featured speaker at one of the opening sessions at next week's TAPPI Engineering, Pulping and Environmental Conference in Portland, Oregon. She will present "State of the North American Pulp and Paper Industry – Weathering a Tough Economy." The presentation, co-authored with FairValue Advisors executive director Dan Cenatempo, will be structured along the following lines:

- Where are we?
- Financial performance
- Outlook: how competitive
- Outlook: the economy
- Outlook: key raw materials
- Key takeaways

The authors will review the state of the industry in the global context of its competitive advantages and opportunities, comparing current performance with recent experience on a grade-by-grade basis, as well as for the industry as a whole. They will examine a variety of measures of the industry's financial performance, against backdrops of recent history and broader market performance. Dynamics affecting future competitiveness will be outlined, with special reference to grade-specific effects of external factors and international trade issues. The presentation will conclude with overviews of how external economic factors are likely to impact relevant supply and demand issues and a summary of key conclusions.

McNutt and Cenatempo are well known for their incisive and up-to-date analyses of the industry's state and future prospects. Don't miss this one!

Upcoming Events

TAPPI Engineering, Pulping and Environmental Conference. The Doubletree Hotel & Executive Meeting Center, Portland, Oregon. August 24-27, 2008.

TechnoBusiness Forum Reprise. "Enterprise Transformation, College of Environmental Science and Forestry at the State University of New York, Syracuse, October 22, 2008.

CPBIS-PIMA Management Development Program, "Management Development for Enhanced Performance," Global Learning Center, Georgia Tech, October 13-17, 2008.■