Georgia Tech | The Center for Paper Business and Industry Studies

CPBIS

Newsletter of the Center for Paper Business and Industry Studies
A Sloan Foundation Industry Center ◆500 Tenth Street NW◆Atlanta, GA 30332 ◆ http://www.cpbis.gatech.edu/

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Program Announced for EPE Business Sessions

CPBIS will once again have a substantial presence at the Engineering, Pulping and Environmental (EPE) Conference of the Technical Association of the Pulp and Paper Industry (TAPPI). The 2009 edition of the conference will take place in Memphis, TN on October 11-14. Among the papers to be presented in the conference's four business sessions will be three presentations by CPBIS researchers. CPBIS also assisted with the construction of the remainder of the business track, which will comprise the following sessions and presentations:

"State of the Industry"

Chair: Patrick McCarthy, Center for Paper Business and Industry Studies, Georgia Institute of Technology

- "State of the Industry," J. McNutt, CPBIS

"Responding to Critical Challenges Facing the Forest Products Industry"

Chair: Ron Brown, American Forest and Paper Association

Representatives of industry, government and academia will identify technology development pathways in six priority areas:

- Reduce carbon emissions and energy consumption at mills and plants substantially
- Reduce fresh water intake in manufacturing at least 50%
- Increase the supply of high-quality fiber and low-cost biomass
- Increase the value from high-quality fiber and low-cost biomass
- Develop new product features
- Improve recovery and recycling of waste wood and fiber products

"Reshaping the Industry I: Needs and Options"

Chair: Patrick McCarthy, Center for Paper Business and Industry Studies, Georgia Institute of Technology

- "Trends in Manufacturing Paper Products: Investment Strategies for High Performance in a Multi-polar World," C. Counts, Accenture
- "Opening up New Strategic Options in the Forest Industry: Case Biorefineries," S. Pätäri, K. Kyläheiko and J.Sandström, Lappeenranta University of Technology
- "Practices and Plans for Sustainabilty in Georgia's Pulp and Paper Sector: Results from the Georgia Manufacturing Survey 2008," J. Youtie, P. Shapira and L. Kay, Georgia Institute of Technology

"Reshaping the Industry II: Opportunities and Incentives"

Chair: Thomas McDonough, Center for Paper Business and Industry Studies, Georgia Institute of Technology

- "Project Finance: How Environmental Securities & Government Incentives Can Help Plant Improvement Projects Reach the Finish Line," Alex Schay, Carbon Solutions Northwest, and Karen Williams, Lane Powell PC
- "Energy Opportunities in the NA Pulp and Paper Industry," F. Perkowski, Business Development Advisory, Inc.
- "Impacts of Evolving Energy and Climate Policies on the U.S. Pulp and Paper Industry: An Assessment using the National Energy Modeling System," M.A. Brown and Y. Baek, Georgia Institute of Technology

For more information on the EPE Conference, go to http://www.tappi.org/s_tappi/doc_events.asp?CID=11485&DID=560360

MillsOnline Updated

MillsOnline is a CPBIS database that allows the user to determine which pulp and paper mills are in operation today and where they are located, together with mill-specific information. The database is updated at regular intervals by CPBIS graduate research assistant Aselia Urmanbetova.

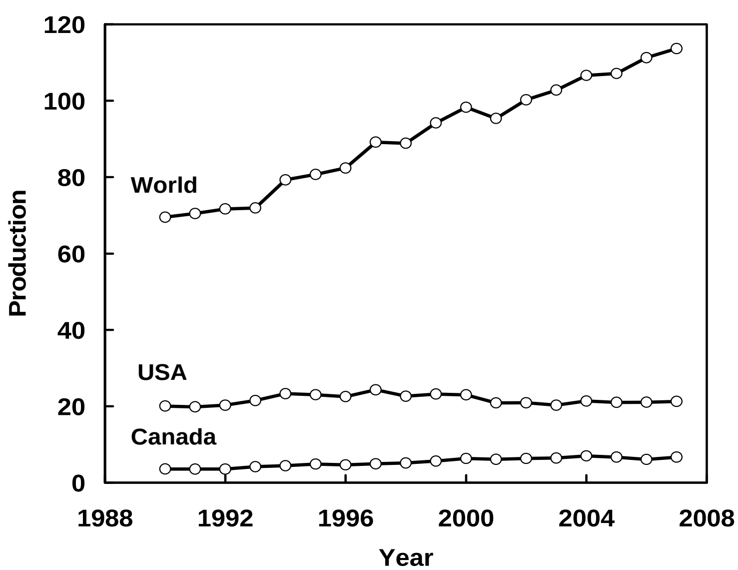
A just-completed update has documented the closure of Caraustar Industries mills in Chicago, Il, Baltimore, MD, Lockport, NY, Roanoke Rapids, NC and Rittman, OH. Also closed were Sonoco Products facilities in Richmond, CA, Atlanta, GA and Munroe Falls, OH.

To access MillsOnline, just click on the map at http://www.cpbis.gatech.edu/millsonline. Locations of mills in that state will appear, with quick links to information about the mill and the community in which the mill operates. The data cover more than 600 U.S. mills.

Statistics Corner: Offshoring of Printing and Writing Production

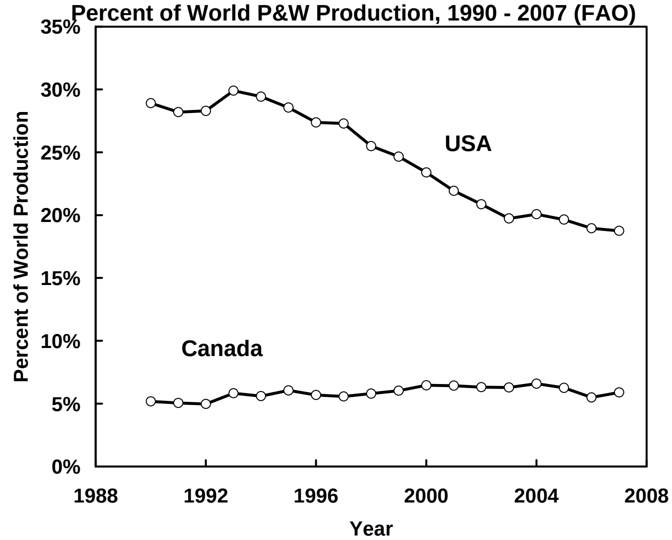
World production of printing and writing (P&W) papers grew by 63% between 1990 and 2007 (Figure 1). The discrepancy between this figure and the corresponding one for bleached kraft pulp (49%) is due to changes in the P&W furnish, notably increased use of fillers and recycled fiber.

Figure 1. Printing & Writing Paper Production, 1990 - 2007, Millions of Metric Tons (FAO)



Also shown in Figure 1 are P&W production data for the U.S. and Canada, from which it is obvious that the North American producers have not enjoyed a significant share of the production growth. Although it is still true that the U.S. produces more than any other country (Canada ranks sixth), U.S. production grew by only 6% during the 1990 – 2007 period, while the corresponding figure for China was 285%. Figure 2 illustrates the sharp decline in the U.S. share, and only a small increase in Canada's.

Figure 2. Printing & Writing Paper (P&W) Production as Percent of World P&W Production, 1990 - 2007 (FAO)



Figures 3 and 4 show the geographical distributions of P&W production in 1990 and 2007, respectively. The growth of the Chinese industry is particularly notable.

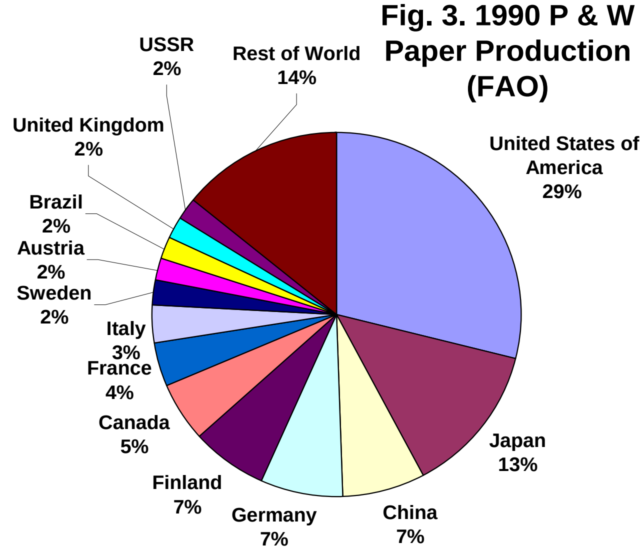
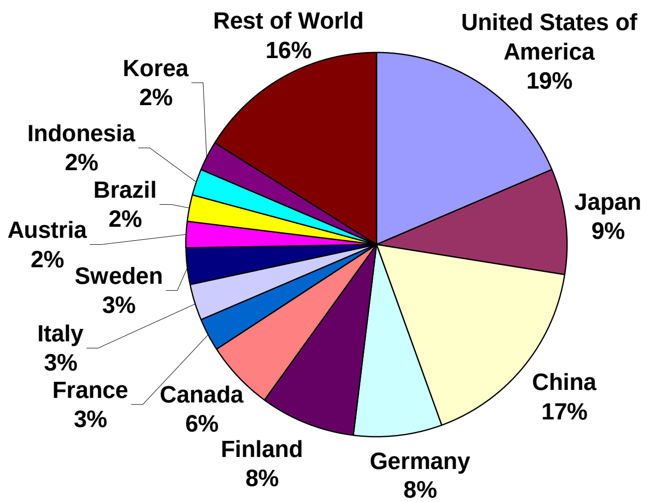


Fig. 3. 1990 P & W Paper Production (FAO)

Fig. 4. 2007 P & W Paper Production (FAO)



Upcoming Events

CPBIS-NCSU-PIMA Management Development Program, "Management Development for Enhanced Performance," Global Learning Center, Georgia Tech, June 22 – 26, 2009. ■

Management Skills for the Paper Industry Turnaround

Guiding the industry through this difficult period will require excellence in management. Now is an appropriate time to prepare to participate in the leadership that will be required to help your company emerge stronger. Register now for the CPBIS-NCSU-PIMA short course, *Management Development for Enhanced Performance*. Go to http://www.cpbis.gatech.edu/education/educationprof/mgt_dev.htm