

# TABLE OF CONTENTS

## SECTION 1. ECONOMICS OF THE INDUSTRY

Introduction	1
Company concentration and diversification	5
Profitability and company performance	14
Long-term growth	12
Profitability and company performance	14
Prices	21
Employment, expenditures, and productivity	22
Capital investment	27
Research and development	28
Distribution	30
Geographical patterns	31
Transportation	32
Marketing to the paper industry	34
Seasonality	35
Foreign trade and investment	36
World production and consumption	38

## SECTION 2. TECHNOLOGY AND RAW MATERIALS

Production	43
Pulping	43
Bleaching	48
Stock preparation	49
Papermaking	51
Converting	52
Timberlands	52
Fibrous raw materials	54
Pulpwood	54
Paper stock	55
Other fibrous stock	56
Chemicals	56
Pulping and bleaching chemicals	58
Papermaking and converting chemicals	60
Energy	64
Equipment	64
Pollution control	66

## SECTION 3. PULP

Market	71
Grades and uses	73
Industry structure	75
Prices	78
Foreign trade	78

Sources of information	81
SECTION 4. PAPER	82
Newsprint	82
Industry shipments	82
Industry structure	85
Prices	86
Sources of information	87
Printing and writing papers	87
Uncoated groundwood papers	87
Coated papers	89
Uncoated free sheet papers	92
Cotton and thin papers	96
Bleached bristols	96
Sources of information	98
Packaging and industrial papers	98
Industry shipments	99
Industry structure	99
Prices	101
Sources of information	102
Tissue	102
Industry shipments and products	102
Industry structure	104
Prices	104
Sources of information	104
SECTION 5. CONVERTED PAPER PRODUCTS	105
Flexible packaging	105
Materials	109
Industry structure	110
Sources of information	112
Shipping sacks and multiwall bags	112
Industry shipments	113
End uses	113
Industry structure	116
Prices	116
Sources of information	117
Grocery and shipping sacks	117
Industry shipments	117
Industry structure	118
Prices	118
Sources of information	119
Sanitary products and nonwoven disposable soft goods	119
Industry shipments	119
Retail sales	120
Industry structure	121
Prices	123
Sources of information	123

Sensitized and carbon papers	124
Industry shipments	124
Products and end uses	125
Industry structure	126
Sources of information	126
Envelopes	126
Shipments	127
Products and uses	127
Industry structure	129
Sources of information	129
Pressure-sensitive and gummed labels and tapes	129
Industry shipments	129
Products and uses	129
Industry structure	130
Sources of information	130
Die-cut products	130
Industry shipments	130
Products and uses	131
Industry structure	131
Sources of information	131
Stationery	131
Industry structure	134
Sources of information	134
Miscellaneous converted products	134
Industry shipments	134
Industry structure	135
Sources of information	136
SECTION 6. PAPERBOARD	137
Containerboard	138
Boxboard	144
Miscellaneous uses	144
Industry structure	145
Foreign trade	145
Prices	149
SECTION 7. CONVERTED PAPERBOARD	
Corrugated containers and solid fibre boxes	150
Industry structure	150
Products and uses	151
Industry structure	153
Prices	154
Raw materials	155
Sources of information	155
Folding cartons	159
Industry shipments	159
Industry structure	160
Raw materials	160

Sources of information	161
Sanitary food containers	161
Industry shipments	162
Products and uses	162
Industry structure	167
Raw materials	170
Sources of information	170
Composite cans, fibre drums, tubes and cores	170
Industry shipments/uses	170
Industry structure	171
Prices	171
Raw materials	171
Sources of information	171
Rigid paperboard boxes	174
Industry shipments/uses	176
Industry structure	176
Raw materials	178
Sources of information	178
Molded pulp packaging	180
 SECTION 8. CHEMICAL BY-PRODUCTS	 181
Kraft by-products	181
Tall oil	181
Turpentine	183
Other kraft by-products	184
Sulfite pulp by-products	184
 SECTION 9. CANADA	 185
 SECTION 10. INDUSTRY ORGANIZATIONS AND INFORMATION SOURCES	 205
Industry meetings, exhibitions, and trade shows	205
Sources of statistical information	205
Trade associations, technical, and professional societies	207
Foreign associations	209
Trade publications and technical journals	212
Periodicals and newsletters	215
On line data bases	216
Directories and guides	217
Foreign periodicals and newsletters	218
 SECTION 11. THE LEADING 507 U.S. AND CANADIAN PAPER COMPANIES	 221
Estimated sales by product line for companies with sales over \$15 million	221
Cross-reference to divisions, subsidiaries, and parent companies	333

SECTION 12. GLOSSARY