

Overview

Below are the Table of Contents, an excerpt and a sample table from the *North American Paper Packaging Capacity Report*.

The *North American Paper Packaging Capacity Report* provides historical, planned and assumed capacity by mill for the North American paper packaging industry from 1999 to 2011. Capacities are listed by mill and by grade.

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Table of Contents*Introduction**Definitions**North American Capacity Summary by Grade and Country**Leading Producers of Paper Packaging by Grade**North American Paper Packaging Capacity by Mill*

United States
Canada

North American Paper Packaging Capacity by Grade

Kraftliner
Semicheical Medium
Recycled Containerboard
Bleached Boxboard
Unbleached Boxboard
Recycled Paperboard, Coated
Recycled Paperboard, Uncoated
Kraft Paper
Specialty Packaging & Industrial Paper

North American Paper Packaging Capacity by Region

US Northeast
US North Central
US South Atlantic
US South Central
US Mountain & Pacific
Eastern Canada
Western Canada

Excerpt - Introduction

This report includes the current, planned and assumed future capacity growth for the North American paper packaging markets. There are three primary categories of paper packaging materials: containerboard, boxboard and packaging/industrial papers. The containerboard category is further segregated into kraftliner, semichemical corrugating medium and recycled containerboard (both linerboard and corrugating medium). All other paperboard products were included in the broad boxboard category, even though many of these grades are not used for conversion to cartons. We divided this capacity into four main segments (bleached board, unbleached boxboard, clay coated recycled and uncoated recycled), but also present a summary for the total recycled boxboard market. The packaging and industrial paper capacity was split into two segments: kraft packaging paper and all other specialty packaging and industrial papers.

The figures in this report are based on published information as well as our own estimates. The total of the individual mill capacities for the US and Canada was also constrained to roughly equal the national figures reported in the annual capacity surveys published by the American Forest and Paper Association (AFPA) and the Pulp and Paper Products Council (PPPC). However, we also report a "grade shift" category that is used to balance the capacity figures with the national totals. This is because many of the existing mills have the capability to switch production easily between various grades. This can either be within a particular market segment (e.g., recycled linerboard to recycled medium), between packaging segments (e.g., kraft paper to kraftliner) or even outside of the packaging market (e.g., bleached board to bleached bristols or market pulp). The data in this report is updated periodically and published once a year.

The capacity data are presented in several sections. The first presents an overview of the capacity situation for the North American market, both in terms of the broad changes in capacity over time and a more detailed view of the leading suppliers to each market segment this year. The second section presents US and Canadian capacity by mill from 1999-2011. This section lists the total capacity for all paper

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grades produced at the mill, not just the packaging grades. The next section presents a list of mill capacities sorted by grade and company for the same time period and includes company totals by market segment. The final section presents mill capacities (packaging grades only) sorted by region or province for the US and Canada, including regional or provincial totals for 1999-2011. Assumed capacity growth or grade shifts that were not mill-specific were excluded from the regional forecast totals.

Definitions

Paper Packaging Grades

CNT	Containerboard
LNK	Kraftliner
LNB	Bleached Kraftliner
CMS	Semichemical Medium
LNR	Recycled Linerboard
CMR	Recycled Medium
BXT	Boxboard and Other Board
BXB	Bleached Boxboard
CBB	Folding Cartonboard
CBL	Liquid Packaging Board
OBF	Food Service (Cup & Plate)
BXU	Unbleached Boxboard
CBU	Folding Cartonboard
OBU	Other Unbleached Board
BXR	Recycled Boxboard
CBC	Coated Cartonboard
CBN	Uncoated Cartonboard
OBG	Gypsum Wallboard Facings
OBT	Tube, Can, Core & Drum
OBR	Other Recycled Board
CBM	Multi-Ply / Multi-Furnish Boxboard
PIP	Packaging & Industrial Paper
WPT	Kraft Wrapping Paper
WPU	Unbleached Kraft Paper
WPB	Bleached Kraft Paper
SIP	Specialty & Industrial Paper

Other Pulp & Paper Grades

Paper

NEW	Newsprint
UFS	Uncoated Freesheet
UME	Uncoated Groundwood
CFS	Coated Freesheet
CME	Coated Groundwood
BRI	Bristol Papers
CFP	Cotton Papers
TIS	Tissue
BPB	Building Paper & Board

Market Pulp

BSK	Bleached Softwood Kraft
BHK	Bleached Hardwood Kraft
UKP	Unbleached Kraft
HYP	Chemithermomechanical
DMP	Deinked Pulp

Sample Table

Capacity by Grade in North America Thousands of Tons per Year

Kraftliner

Company	Mill	Ownership	Grade	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Boise	DeRidder, LA	Boise	LNK	520	540	557	557	557	557	560	560	643	643
Norampac	Red Rock, ON	Norampac Cascades	LNK	470	470	470	428	440	450	399	222	0	0
Catalyst Paper	Campbell River, BC	Catalyst Paper	LNK	95	95	108	121	126	144	144	144	144	137
Durango-Georgia Paper	St. Marys, GA	Durango Group	LNB	50	50	50	0	0	0	0	0	0	0
GP Cellulose	Brunswick, GA	Georgia-Pacific	LNB	10	5	0	0	0	0	0	0	0	0
Georgia-Pacific	Crosset, AR	Georgia-Pacific	LNB	0	0	0	20	40	93	37	37	50	50
Georgia-Pacific	Cedar Springs, GA	Georgia-Pacific	LNK	870	901	901	901	925	925	925	925	928	930
Georgia-Pacific	Monticello, MS	Georgia-Pacific	LNK	1,107	1,126	1,126	1,126	1,105	1,114	1,114	1,114	1,103	1,103
Georgia-Pacific	Palatka, FL	Georgia-Pacific	LNK	131	131	96	37	39	39	39	42	34	7
Georgia-Pacific	Toledo, OR	Georgia-Pacific	LNK	532	357	357	357	357	357	357	357	346	357
Georgia-Pacific	Brewton, AL	Georgia-Pacific	LNK	340	340	320	320	327	327	303	303	305	321
Graphic Packaging	Macon, GA	Graphic Packaging	LNK	50	50	35	25	15	15	0	0	0	0
Graphic Packaging	West Monroe, LA	Graphic Packaging	LNK	85	85	95	75	75	75	75	26	0	0
Arkansas Kraft	Morrilton, AR	Green Bay	LNK	468	446	446	446	446	446	440	450	436	296
Inland	Orange, TX	Inland	LNK	648	648	650	650	682	650	650	655	700	757
Inland	Rome, GA	Inland	LNK	821	821	821	821	821	823	857	875	890	894
Inland	Bogalusa, LA	Inland	LNK	803	900	900	925	866	866	934	934	934	913
International Paper	Mansfield, LA	International Paper	LNK	643	643	643	643	1,073	1,120	1,160	1,238	1,218	693
International Paper	Pineville, LA	International Paper	LNK	393	393	393	393	393	393	400	425	425	419
International Paper	Prattville, AL	International Paper	LNK	1,000	1,000	1,071	1,071	1,071	1,071	1,085	1,085	1,085	1,085
International Paper	Savannah, GA	International Paper	LNK	825	1,074	844	584	589	834	650	672	671	666
International Paper	Redwood, MS	International Paper	LNK	571	571	571	560	560	557	503	521	530	568
International Paper	Cantonment, FL	International Paper	LNK	0	0	0	0	0	0	0	0	133	532
International Paper	Albany, OR	International Paper	LNK	348	413	512	510	455	470	480	538	540	570
International Paper	Campti, LA	International Paper	LNK	857	936	944	950	950	970	970	970	964	964
International Paper	Pine Hill, AL	International Paper	LNK	525	520	520	525	525	525	525	558	559	553
International Paper	Springfield, OR	International Paper	LNK	790	790	709	637	570	590	610	610	630	625
International Paper	Valliant, OK	International Paper	LNK	928	950	1,025	1,000	985	985	1,028	1,177	1,127	964
Interstate Paper	Riceboro, GA	Interstate Resources	LNK	274	274	286	286	286	300	323	323	323	321
KapStone Kraft	Roanoke Rapids, NC	KapStone Kraft	LNK	368	368	278	339	189	214	29	30	90	80
KapStone Kraft	North Charleston, SC	KapStone Kraft	LNK	11	31	15	140	178	178	88	80	29	33
Longview Fibre	Longview, WA	Longview Fibre	LNK	785	785	785	785	616	516	600	584	456	357