

The Australian papermaking market is dominated by:

- i) Australian Paper Manufacturers Ltd. (APM), producing 200 grades of kraft paper and paperboard;
- ii) Associated Pulp & Paper Mills Ltd. (APPM), producers of fine paper, including telephone directory paper;
- iii) Australian Newsprint Mills Ltd. (ANM), sole local producer of newsprint;
- iv) Kimberley Clark Australia Pty Ltd. (APCEL, 50 per cent owned by APM), producer of tissue and toilet papers;
- v) Bowater Scott Corporation Ltd., tissue and toilet paper manufacturers.

APM and APPM together account for about \$1.6 billion of the projects likely to be undertaken, including pulp mills in South Australia, New South Wales, Queensland and Tasmania as well as the current pulpmill expansion of APM's large integrated mill at Maryvale in Victoria. Two other companies, W.A. Chip & Pulp of Perth and Harris Daishowa Ltd. of Eden, are considering adjoining pulp mills to their woodchipping facilities.

The largest project underway (scheduled for commissioning in June 1981) is the ANM's new mill at Albury, N.S.W. The initial feasibility study carried out by H.A. Simons, of Vancouver, who have been appointed project engineers.

The large-scale developments now taking place in softwood sawmilling are expected to create spinoffs in the hardware sector - which to date has largely been a fragmented, small, bush-type operation. In order to remain competitive against softwood lumber, the hardwood industry will need to rationalize through amalgamation and to introduce labor-saving techniques.

b) The Canadian Industry

i) Forest Harvesting Equipment:

Canada is a major producer and exporter of forest harvesting machinery. Canadian manufacturers produce a complete range of machinery suitable for harvesting all species of trees on all types of terrain.

The industry consists of 20 companies with \$270 million of annual production of which \$165 million are exports. Ontario produces \$195 million, British