



REVIEW OF PULP AND PAPER INDUSTRY

Distribution and Ownership of Facilities

The twelve southeastern states that form the geographic boundaries of this study comprise the major pulp and paper manufacturing center of the industry in the United States. Six of the states are among the top ten paper producing states, and eight of the states rank among the top ten woodpulp producing states (Table 1). According to 1983 Department of Commerce statistics, the state of Georgia produces 9% of all paper and board produced in the U.S., and 11% of all wood pulp. Alabama is the second largest manufacturer, producing 7% of all paper and board and 9% of all wood pulp. Southern wood pulp capacity presently is 67.1% of the U.S. total and this is expected to increase to 80% by 1990.¹

Table 1. Ranking of the Top Ten Paper and Woodpulp Producing States (1983)

<u>Paper</u>	<u>Woodpulp</u>
Georgia	Georgia
Alabama	Alabama
Wisconsin	Louisiana
Louisiana	Florida
Maine	Washington
Oregon	Oregon
Washington	Texas
Virginia	North Carolina
South Carolina	Virginia
Florida	South Carolina

The concentration of the pulp and paper industry has resulted from the availability of a fast growing pine fibre source with relatively low stumpage costs, sufficient labor force with low labor rates, and proximity to the rapidly growing population centers and markets. Table 2 is a summary of Pulp and Paper Facilities by State within the study area that were in operation in 1983 or at least near construction completion. Also shown in Table 2 is a breakdown of the pulping methods for those facilities which will be related to equipment content in later sections of this report. The significance is the preponderance of kraft process based mills versus other pulping methods. Groundwood mills are relatively few due to the high power costs in the Southeast and species characteristics of the southern pines. A detailed listing of pulp and paper facilities by state, including location, is contained in Appendix 2. Also included in Appendix 2 are maps of each state showing the geographic distribution of the facilities.

¹ Tappa Journal Volume 67.