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*BDA Announces a New Study:*

# ENERGY OPPORTUNITIES IN THE NORTH AMERICAN PULP AND PAPER INDUSTRY

## Assessing Bio/Renewable/ Fossil Fuel Energy — Assets, Usage & Opportunities

**Available:**

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Business Development  
Advisory (BDA)

**Target Audience:**

- ♦ Suppliers of energy-related products
- ♦ Power & Energy Producers
- ♦ Pulp and Paper Producers
- ♦ Public / Government Entities
- ♦ Energy Materials Owners / Developers
- ♦ Investors
- ♦ Technology & Research Firms

### **Summary**

This study uses the power of the FisherSolve™ and BDA industry analysis to provide an in-depth assessment of energy assets, usage, costs, capabilities, and expansion opportunities in the North American pulp and paper industry. Using detailed information on every mill's energy related equipment, capabilities, and production levels, this "first of a kind" study answers questions such as:

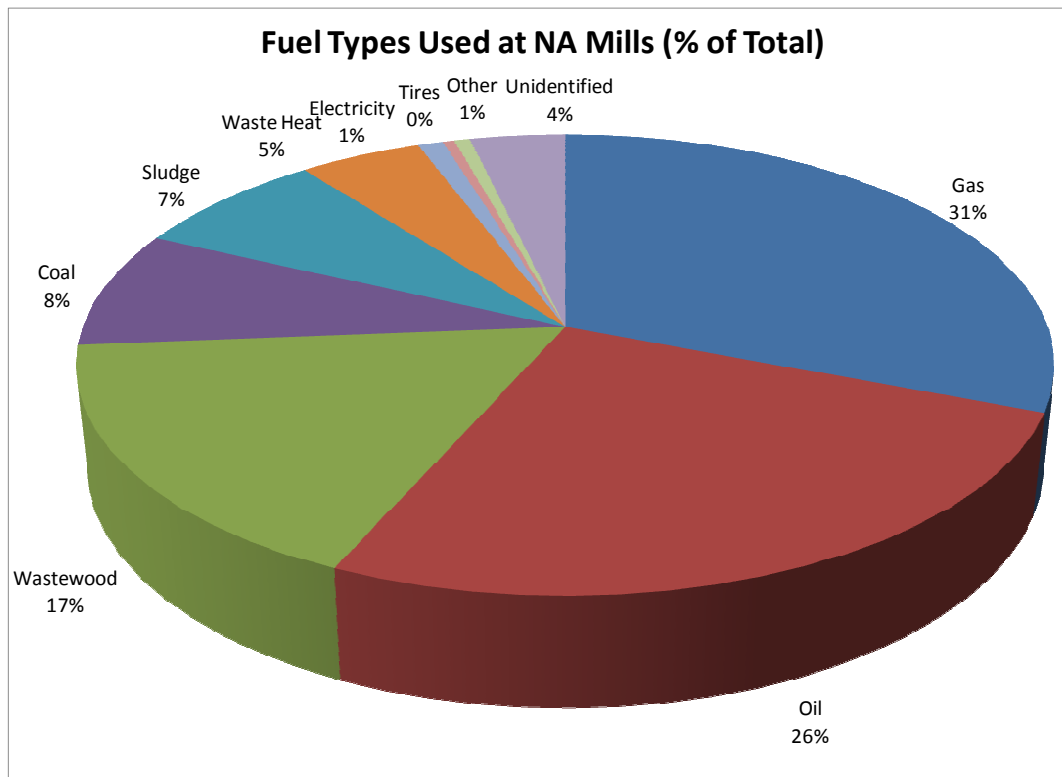
- ♦ What new business and development opportunities are there for suppliers of energy-related equipment & services?
- ♦ What is the potential for expanded energy production and the development of energy islands, bio refineries, and energy sales to the grid?
- ♦ What regions, industry segments, facility types, and process areas offer the best energy development opportunities?
- ♦ How much and what types of fuel are consumed by segment and how will this mix change over the next five years?
- ♦ What is the scope and condition of the installed energy asset base and how much capital investment in these assets will be required over the next five years?
- ♦ What likely changes in energy sources, types, costs, consumption levels, and asset base will take place over the next five years?



## Study Scope

The study analyzes the industry's energy assets, capabilities, costs, and consumption levels in total and within key segments such as grade category, geographic region, and facility type, facility size, and mill process area. For each major industry segment, the study will:

- Quantify industry energy usage by energy type.
- Define levels of energy self sufficiency, energy sales back to the grid, and outside electricity purchases.
- Identify energy consumption and ranges by mill type and major processes.
- Analyze industry energy costs per kwh, ton, and average facility and assess a) the relationship of energy costs to overall manufacturing costs, b) actual energy capital investment levels and depreciation charges, and c) affect of energy cost changes and higher renewable energy use on energy and total manufacturing production costs.
- Evaluate energy – related assets by type and capacity and assess the technical age and capabilities of these assets by segment.
- Review the state of bio and renewable energy usage within the industry including current usage levels, planned / potential expansions and potential technology developments.
- Assess current energy consumption and project major changes over the next five years based on industry, external, and government policy developments and dynamics.
- Assess the impact of forecasted changes in energy usage and investment on other areas including total manufacturing costs, fiber / chemical usage, and other mill operations.



**Preliminary Table of Contents****I. Introduction**

- Study Objectives
- Methodology
- Information Sources

**II. Executive Summary****III. North American Pulp and Paper Asset Review**

- Overview of North American energy assets, capacities, capabilities, and equipment details
- Equipment profiles by key segment:
  - ♦ Geographic region and market area
  - ♦ Major grade category
  - ♦ Facility type and size
- Relationships of energy assets to energy and total manufacturing costs
- Current capital investment levels and depreciation charges for capital assets
- Five-year forecast of likely equipment expenditures, industry capacities, and technology developments

**IV. Energy Sources, Types, and Costs**

- Energy consumption by fuel / power sources including renewable / bio energy types
- Energy cost details by fuel type, major process area, grade category, and region
- Purchased and self-generated electricity levels including sales back to the grid
- Major mill suppliers of purchased energy and other fuels
- Cost impact of changes in fuel types and costs including increased bio / renewable fuels
- Five-year projections of future energy demand, usage levels, self generation, costs, and energy mix

**V. Implications, Challenges and Opportunities**

- Impact of current and projected industry dynamics and trends on:
  - ♦ Energy cost, production, and consumption levels
  - ♦ Energy process and technology developments
  - ♦ Industry structure / consolidation / business models
  - ♦ Chemical, fiber, and material usage levels
  - ♦ Energy asset base and total capital requirements
- Assessment of internal / external threats and opportunities
- Alternative scenarios and sensitivities.

**VI. Appendix**

## Study Contributors and Partners

### Publisher

**Business Development Advisory (BDA)** is a specialized consulting organization focused on the pulp and paper industry. **Frank Perkowski**, BDA principal, is the study author and has over 25 years experience in the pulp and paper industry.

### Technical Data

**Fisher International** is an information services that has delivered business intelligence information to industry since 1985. Through its FisherSolve™ solution, the company offers accurate databases and insights into the global pulp and paper industry.

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## STUDY PRICING

The base price for one PDF copy of this study is **\$1,950**. A special 20% “pre-publication” discount is available on all advance orders received prior to **June 30, 2009**. We expect the study to be completed in the 3rd quarter, 2009. Payments can be made by check, electronic transfer, or credit card and must be received prior to report delivery.

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