

Thrive in These Challenging Times

By now, you should have marked your calendar to attend the premier forest products event of the year. PIMA's Leadership Conference, which takes place June 27-30, 2004 at the Sheraton New Orleans, will deliver valuable tools to help you **thrive** in these challenging times.

For the first time, the 85th Annual International Management Conference and the 36th Annual International IT Conference will occur simultaneously in the same location. The IT exhibits will be open to all attendees. This exciting new format offers added value through increased educational and networking opportunities.

You should attend this conference if you have responsibilities in Operations, Finance, Maintenance, Process/Performance Optimization, or Information Technology. Educational sessions have been designed with your success in mind. The following are some of the key benefits of attending:

- Learning the best practices and tools for developing and sustaining innovation
- Understanding what business factors CEOs and CIOs focus on to keep a company thriving
- Transforming maintenance reliability into results
- Learning how to continually manage costs to improve profits
- Benchmarking with industry leaders in targeted sessions and roundtables
- Gaining greater performance from your employees through personal accountability and managing conflict

Top industry and marketplace leaders will present their views on how they are thriving in the current economic environment. Keynote speaker Sean O'Keefe of the National Aeronautics and Space Administration will share his NASA experiences and discuss leadership, innovation, and the will to get positive results.

In addition, the CEO and CIO panels will discuss critical and timely industry issues and how to lead your businesses to success. The President's Panel will feature Dr. William H. Joyce of Nalco, Jan Brons of SKF Reliability Systems, and Tom Brown of Carustar. CIO Panel participants include Dac Nguyen of PanAsia Paper, John Balboni of International Paper, Jim Burdiss of Smurfit-Stone Container, and Jorma Saarikorpi of UPM-Kymmene.

The 2004 PIMA Leadership Conference is a great platform for benchmarking with industry leaders and for acquiring the necessary skills to add value to your daily job performance. This year's format will provide value for your entire team by offering multiple education tracks, exhibit hall time, the latest in technology, innovative learning opportunities, and discounted pricing.

For more information regarding PIMA's 2004 Leadership Conference, including a full program listing, or to register, call 847/375-6860 or visit www.pimaweb.org.

We look forward to seeing you in June!

Harry Seamans
PIMA President
Vice President,
Pulp and Paperboard
Potlatch Corporation




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Building Management Excellence

Register Online!

Online Registration is now available for PIMA's 2004 Leadership Conference. Visit www.pimaweb.org to register and view full conference details.

www.pimaweb.org



Diane Murdock
Affiliate Chair
Appleton
International Inc.



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Glenview, IL 60025-1485
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www.pimaweb.org

PIMA 2004 Leadership Conference Schedule of Events

June 28, Monday

5:30–7:30 pm

Opening Welcome Reception

June 28, Monday

8–8:30 am

Opening Remarks and Color Guard

8:30–10:15 am

Keynote Address:

Leadership in a Thriving Environment
Sean O'Keefe, Administrator, National Aeronautics and Space Administration

General Session: President's Panel
Moderators: Harry Seamans and Diane Murdock

- Dr. William Joyce, Chairman of Board and CEO, Nalco Company
- Jan Brons, President, SKF Reliability Systems
- Tom Brown, President and CEO, Carastar

10:30–Noon

Creating an Innovative Culture: Ideas and Issues

- Thomas Kuczumarski, Kuczumarski & Associates

IT Strategy: Developing Viable Alternatives with Linux

- Mike Ferris, Red Hat Enterprises
- Paul Moore, Georgia-Pacific
- Myron Blaine, Boise Cascade

Noon–1:15 pm

Lunch in Exhibit Hall

1:30–2:20 pm

M201: Manufacturing Reliability: Financial Impact of Reliability and Maintenance

- Dr. Carol Vesier, RONAMax

M202: Value Creation: Tactical Pricing Opportunities

- John Poisson, Accenture

M203: Innovation Management Part I: Issues and Ideas

- Fritz Herren, CIBA Specialty Chemicals

IT204: ERP Reality Check

- Denis Bourbeau, Abitibi Consolidated
- Greg Paton, Weyerhaeuser
- Clayton Austen, Domtar Inc.

IT205: RFID Supplier Applications: Wal-Mart, DoD, and Standards

- Michael S. Fisher, Intermec Technologies Corp.

IT206: Ensuring Enterprise Security

- Steven C. Fullbright, International Paper Co.

2:30–3:20 pm

M301: Transforming the Reliability Strategy into Results

- Gilson Martins, Votorantim Celulose E Papel (VCP)

M302: Exciting Industry Improvements

- Benjamin Thorp, Georgia-Pacific

M303: Innovation Management Part II: Practical Applications

- Ian McKenna, Celevere

IT304: Quality Management Using Six Sigma

- Judith W. Passwaters, E.I. DuPont DeNemours

IT305: Sonoco Business Redesign: Best of Breed vs. ERP

- Kevin Casper, Sonoco Papers

IT306: Mobile Computing for Road Warriors: Real Freedom, or a Slave to your Devices?

- Richard Stone, Hewlett Packard

3:50–4:40 pm

Technology Showcases

M401: Manufacturing Reliability: Setting Reliability Goals and Strategies

- Joseph Konkel, Georgia-Pacific
- Joel T. H. Black, Aladon LLC

M402: Personal Accountability: The Antecedent for Personal Success in Business and in Life

- Ron Pote, BYO Solutions

5–7 pm

Hospitality Reception in Exhibit Hall

Streets of New Orleans Party

Old friends, new friends, peers, and colleagues are invited to PIMA's Streets of New Orleans party. Join us Tuesday evening June 29, for dinner, drinks, and live music as we wind up this exciting leadership conference. Hospitality sponsored reception begins at 4:30 pm in the exhibit hall, followed by a dinner buffet at 6:30 pm. Dress is casual, festive, and fun.

June 29, Tuesday

8–9:30 am

Forecasting the Future

- Peter Ruschmeier, Lehman Brothers
- Tapio Korpeinen, Jaako Pöyry Consulting

10–10:50 am

Technology Showcases

M501: Superintendent's Roundtable

- Moderator: DD Smith, Buckman Laboratories

M502: Wired for Conflict Part A: The Role of Personality in Managing Conflict

- Sondra VanSant, Training Consultant

11–11:50 am

M601: Dealing with Hourly Employees: In Pursuit of Fairness and Competitiveness

- Chris Adams, International Paper
- Robbie Lee, P.A.C.E./AFL-CIO

M602: Wired for Conflict Part B: The Role of Personality in Managing Conflict

- Sondra VanSant, Training Consultant

M603: Lessons Learned from 120+ Wood Fiber Supply Chain Workshops

- Richard Lewis, Forest Resources Association

IT604: Outsourcing Out-of-Country

- Thierry Guyader, Greycon
- Shawn Awan, Weyerhaeuser
- Aneel Jaeel, PeopleSoft

IT605: IT Portfolio Management: Managing with Limited Resources

- Kathleen Bennett, Georgia-Pacific

IT606: Real Time Performance Management

- Diane Bricco, MeadWestvaco

Noon–1:50 pm

Awards Luncheon

Join your colleagues as they are honored for their service and dedication to PIMA and the pulp and paper industry. PIMA's awards include the Executive of the Year, Brookshire Moore Superintendent of the Year, Thomas F. Sheerin Sr. Award, Ray Cross Community Service Award, and Student of the Year.

Noon–1:15 pm

IT Lunch in Exhibit Hall

1–1:50 pm

Technology Showcases

2–2:50 pm

M801: Wired for Conflict Part A: The Role of Personality in Managing Conflict

- Sondra VanSant, Training Consultant

M802: Improving Group Dynamics: Sharing the Tools to Create High Performance Work Teams

- Bob Rupp, Appleton International

M803: Global Supply Chain: What Does it Take to Thrive in a Commoditized Environment?

- James Poure
GAC Chemical Corp

IT804: Process Control vs. IT Roundtable

- Moderator: Jan Westling, Weyerhaeuser
- Richard Peterson, Weyerhaeuser
- Chris Rogers, Boise Cascade
- Terry Canup, MeadWestvaco

IT805: Performance Improvement Through Online Operator Training

- Reilly Montgomery, AMEC Training & Development Services
- Jim Ryan, AMEC Kamtech

IT806: Sarbanes–Oxley: What It Means To Your Business and IT

- Tim Kutz, Accenture
- Brian McCarthy, Accenture

3:20–4:10

Technology Showcases

M901: Wired for Conflict Part B: The Role of Personality in Managing Conflict

- Sondra VanSant, Training Consultant

M902: Mill Manger's Panel

Moderator: Warren "Buddy" Allen

M903: Global Supply Chain: Examining Similar Industries for Constructive Takeaways

- Anthony R. Taccone
First River Consulting

4:30–6:30 pm

Hospitality Reception in the Exhibit Hall

6:30–10 pm

Streets of New Orleans Party

June 30, Wednesday

8–10 am

Found Money: Improved Profits Are There, But You Have to Know Where to Look

- Douglas Daniels, HeadsUp Systems

9–10 am

Microsoft Strategies and Roadmap

- Chris Colyer, Microsoft

10:15–Noon

CIO Panel

- Moderator: Ole Fadum, Fadum Enterprises
- John Balboni, Vice President and CIO, International Paper
- Dac Nguyen, Director-Corporate IT, Pan Asia Paper
- Jim Burdiss, Vice President and CIO, Smurfit–Stone Container
- Jorma Saarikorpi, CIO, UPM–Kymmene

Noon–12:30 pm

Closing Remarks and Door Prizes Drawing

Optional Events

Golf Outing

Sunday, June 27, 7 am–3 pm

This is a perfect opportunity to network in a relaxed setting. This event—open to all attendees—takes place at Bayou Oaks Golf Facility. Cost per person is \$100, which covers green fee, cart, gourmet boxed lunch, and roundtrip private air-conditioned bus transportation.

Dinner Cruise

Monday, June 28, 7–10 pm

Cruise up the mighty Mississippi River aboard the riverboat *Cajun Queen*—an authentic replica of an old riverboat that carried passengers along the Atlantic and Gulf Coast during the late 19th Century. Included in the \$89 per person fee is a sumptuous dinner buffet, plus music by a live jazz band. Prepare for an unforgettable evening that truly captures the spirit of New Orleans. The tour includes 1 hour boarding and 2 hours cruising time.

Go to www.pimaweb.org for updated conference details.

Joint Conference Descriptions

Joint General Sessions

Keynote Speaker

Sean O'Keefe, Administrator of the National Aeronautics and Space Administration (NASA)

Leadership in a Thriving Environment: Drawing on his experience in NASA and other senior administrative positions in public life, Sean O'Keefe will discuss leadership, innovation, and the will to get positive results. The keynote address will kick-off the 2004 PIMA Leadership Conference on Monday, June 28, at 8:30 am.



President's Panel



Panelists:

- Dr. William H. Joyce, Chairman of the Board and CEO, Nalco Company
- Jan Brons, President, SKF Reliability Systems
- Tom Brown, President and CEO, Carastar

Top executives in the industry will present and discuss timely industry issues. Attend and learn about the current and future challenges of the pulp and paper industry. PIMA President, Harry Seamans of Potlatch Corporation and PIMA Affiliate Chair, Diane Murdock of Appleton International Inc. will be moderators for the Presidents Panel. The President's Panel will follow the keynote address on Monday, June 28, from 9:15 to 10:15 am.

CIO Panel



Panelists:

- Dac Nguyen, Director-Corporate IT, PanAsia Paper
- John Balboni, Vice President Information Technology & CIO, International Paper
- Jim Burdiss, Vice President and CIO, Smurfit-Stone Container
- Jorma Saarikorpi, CIO, UPM-Kymmene

Top CIOs will address critical industry issues. Attend and learn about the challenges of information technology in the pulp and paper industry. Ole Fadum of Fadum Enterprises will be the moderator for the CIO Panel. The panel will bring the 2004 Leadership Conference to a close Wednesday, June 30, from 10:15 am to Noon.

Forecasting the Future

This session will present two different thought-provoking perspectives on the trends and key drivers of the global paper industry. Peter Ruschmeier from Lehman Brothers will present an analyst's view, while Tapio Korpeinen of Jaako Pöyry will present the view as an industry consultant.

- Peter Ruschmeier, Senior Vice President, Lehman Brothers
 - Tapio Korpeinen, Managing Partner, Jaako Pöyry Consulting
- This session will take place Tuesday, June 29, 8–9:30 am*

PIMA invites you to take advantage of this year's new cross-over programming format. Attend sessions in both the IT and Management tracks, as well as the exhibit hall. Also, Monday and Tuesday, attendees will be able to view Technology Showcases. These are a series of 25-minute sessions in which industry vendors introduce a new product or service, review recent technological advances, and give live demonstrations.

Showcase Times:

Monday:	3:50–4:40 pm
Tuesday:	10–10:50 am 1–1:50 pm 3:20–4:10 pm

Management General Sessions

Creating an Innovative Culture: Ideas and Issues

Thomas Kuczarski is principal of a management consulting firm specializing in helping companies accelerate growth through innovative new product and service development, branding, positioning, and marketing strategy. He will outline what distinguishes an innovative company from other companies. Understand the best practices and tools for developing and sustaining a culture of innovation in your organization.

- Thomas Kuczarski, Kuczarski and Associates
- Monday, June 28, 10:30 am–Noon*

Found Money: Improved Profits Are There, but You Have to Know Where to Look

This session will help managers of mills and divisions understand what financial information and tools are necessary to make smart decisions regarding mill run rates, inventory levels, product mix and capital expenditures. Learn how to outline the steps your company may take to improve your decision-making skills, as well as how to thrive and not just survive.

- Douglas Daniels, HeadsUp Systems
- Wednesday, June 30, 8–10 am*

IT General Sessions

IT Strategy: Developing Viable Alternatives with Linux

What role will open source systems play in our future? Learn about the road map for open source products. An implementation case study will surface issues for review in the development of any IT Strategy.

- Mike Ferris, Global Product Manager, Red Hat Enterprise
 - Paul Moore, Sr. Manager, Georgia-Pacific
 - Myron Blaine, IS Engineer Supervisor, Boise Cascade
- Monday, June 28, 10:30 am–Noon

Microsoft Strategies and Road Map

This session will cover Microsoft's forward looking product roadmap and key initiatives such as trustworthy computing initiative and security in the manufacturing environment.

- Chris Colyer, Industry Manager, Microsoft
- Wednesday, June 30, 9–10 am

PIMA would like to thank the 2004 Leadership Conference Sponsors, Exhibitors, and Technology Showcase Participants.

Platinum Level			
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Silver Level	AMEC AstenJohnson BE&K	Bercen, Inc Ciba Specialty Chemicals J.M. Huber Corporation	Nalco Company Thiele Kaolin Company Weavexx
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*As of April 1, 2004

Meeting The Challenge: Agenda 2020 Program Developing Breakthrough Technology

By Del Raymond and Benjamin Thorp

Nearly 10 years ago, U.S. Energy Secretary Hazel O'Leary challenged the forest products industry to find ways to make its mills more energy efficient. That challenge became Agenda 2020, a partnership between the U.S. Department of Energy (DOE) and the American Forest & Paper Association. Although the program has expanded in size, scope and results, its underlying goal has remained constant—using technology to improve the industry's economics.

The process began with company Chief Technology Officers (CTO) meeting to determine desired mill characteristics in 2020. Through six task groups, CTOs assessed current technology, identified future technology needs, and crafted a pathway for research and development to close the gaps. DOE and CTOs selected the most promising avenues for research and development. The research proposals required matching industry funds of 20 percent for research to 50 percent for demonstration projects.

After five years, total funding was \$30 million, and the research showed prom-

ise in closing small gaps between current technology and future technology needs. Then, in 2000, during an Agenda 2020 status review, industry CEOs issued a challenge. They asked the program to focus on achieving breakthroughs that no single company could do on its own. In essence, they asked Agenda 2020 to reinvent the forest products industry.

The first step in meeting the new challenge was to convene a Technology Summit at which 150 carefully chosen scientists, visionary thinkers, builders and operators, suppliers and service providers, and policymakers identified major breakthrough possibilities. Program task groups were restructured and expanded, a portfolio of existing projects was ordered, a new project management process developed, and a project/portfolio evaluation tool was customized to Agenda 2020 needs. All this was foundational work that gave the program better tools to identify and evaluate opportunities. And it's paying off.

Six new breakthrough platforms have been identified:

- next generation fiber recovery and utilization

- breakthrough manufacturing technologies
- positively impacting the environment
- advancing the forest "bio-refinery"
- advancing the wood products revolution, and
- technologically advanced workforce

The platforms were chosen for their high value and low risk to the industry. If Agenda 2020 initiatives succeed in commercializing 25 percent of these breakthrough technologies, annual industry net cash flow could increase by around \$8.4 billion. Average industry net cash flow for the past five years has been \$9 billion.

One such technology is Black Liquor Gasification, a replacement recovery technology that could result in an additional 30 gigawatts of power and an increased cash flow of \$2 to \$6 billion a year. A high-temperature gasifier is operational at Weyerhaeuser's New Bern facility, and a low-temperature unit will begin operation in 2004 at Georgia-Pacific's Big Island mill. This technology replaces Tomlinson Furnaces that produce only steam and recovered pulping chemicals. Gasification provides fiber in

Division Calendar

April 14–15

Northeast PIMA

Spring Meeting with TAPPI

Wells Common University of Maine
Orono, ME

April 15–16

Northeast PIMA

University of Maine Pulp and Paper Foundation Open House

Orono, ME

May 14

Southwest PIMA

Cypress Course at Sunol Valley Golf Club

Sunol, CA

See Division News for Registration information

May 15

Southwest PIMA

Dinner Cruise

San Francisco Bay

June 7

North Central PIMA

Bulls Eye Country Club

Wisconsin Rapids, WI

For more information, please contact John Sommercorn at 920/731-6826

June 11

Northeast PIMA

8th Annual Golf Tournament

Fox Ridge Golf Club

Auburn, ME

June 27

Dixie Southern, Dixie Southeast, and

Dixie Sales Society Business Meetings

Sheraton Hotel New Orleans

3:30 pm, Room is TBD

November 12

Northeast PIMA

Fall Meeting

Hilton Garden Inn

Auburn, ME

For more Northeast Division information, please go to www.northeastpima.org.
For more PIMA division information, visit us at www.pimaweb.org or call 847/375-6860.

addition to a hydrogen-rich gas that can be used to generate steam, power, liquid fuel, and even products now manufactured by the petrochemical industry. This offers processes, products, and high value streams not previously available to the forest products industry.

Another project that would require almost no capital investment is called Screenable Pressure Sensitive Adhesives—a PSA that can be removed in most recycling facilities. This could save 10 trillion BTUs, boosting cash flow by \$107 million per year. Boise Cascade and H.B. Fuller are pursuing commercialization.

Hemicellulose Extraction and Use is another breakthrough in which chips go through a water extraction stage before pulping. This “light liquor” is then processed to produce ethanol. The project would boost the product value from wood resources by 25 percent with a potential annual revenue increase of \$1 billion.

A project called “Green Liquor Pre-treatment” is another breakthrough with small projected capital costs. Green liquor possesses increased penetration and lignin removal capabilities. Injecting it into continuous digestors early in the

process increases yield and lowers heat requirements for pulping. This technology could save 20 trillion BTUs for a cash flow increase of \$440 million per year.

An industry-sponsored Franklin Associates report indicates that Wood MACT regulations are likely to require an additional 300 Regenerative Thermal Oxidizers in 166 plants. Such an addition would actually increase CO₂ emissions by 4.6 million metric tons. Agenda 2020's VOC/HAP Reduction project can change process conditions to eliminate the need for RTOs without hurting production or economics. The technology has been successfully tested at a South-eastern OSB mill.

The Gas Technology Institute (GTI) has partnered with Boise Corporation, Detroit-Stoker Company, Reaction Engineering and Sargent & Lundy to develop a boiler retrofit technology that saves energy, increases boiler capacity, and reduces gaseous emissions. Broad application in the forest products industry could save more than \$134 million in energy and landfill costs, reduce industry energy consumption by 32 trillion BTUs per year, and reduce NOx emissions by more than 44,000 tons per year. GTI has licensed the technology to Energy Sys-

tems Associates of Carnegie, PA.

Other industries have thrived from innovation. The Agenda 2020 program is a systematic and realistic approach for the forest products industry. Finding ways to develop and implement new technologies is vital to the industry. Europeans are investing in similar goals. They have completed a black liquor to liquid fuels study and patented a pulping process that may increase yield by five percent. The U.S. forest products industry must innovate to compete.

The Agenda 2020 program identifies the intersection of societal, government and industry needs, provides a mechanism to build support for large projects, efficiently allocates available resources, and offers a roadmap to deploy the results. Those results meet the challenge issued by CEOs four years ago—they have the potential to transform the industry.

Learn more about the Agenda 2020 program at www.oit.doe.gov/forest/. Or e-mail Richard_Campbell@afandpa.org.

Del Raymond is chairman of AF & PA's Chief Technology Officers Committee, and director of strategic energy alternatives with Weyerhaeuser; Benjamin Thorp is deployment director, Agenda 2020 for Georgia-Pacific.



Division News



2004 Southwestern PIMA Golf Tournament in Sunol, CA

Join Southwestern PIMA on May 14, 2004, at Cypress Course, located in Sunol Valley on Hwy. 680. Please arrive at 12:15 pm; shotgun start time is at 1 pm. Teams must have one paper mill supplier who is a

PIMA member, and no more than two suppliers per team. Scramble rules will apply. Winning team members' names will be engraved on a trophy to be kept until the next tournament. Vendors are encouraged to bring give-away items and prizes. Tee times are limited, so reserve your spot early.

Tournament Fees (non-refundable): \$80 per person before May 1, 2004; \$100 per person after May 1; \$120 per person after May 14. Please make checks payable to PIMA and send along with a registration form (available at www.pimaweb.org) to:

Beth Sheppard
Smurfit-Stone Container Corporation
2600 De La Cruz Blvd.
Santa Clara, CA 95050
Fax: 408/496-5027 (Attn: Beth Sheppard)
For more information, please call 408/496-5104



Special Note to Dixie PIMA's Southern and Southeastern Divisions

In place of its regular fall event, Dixie PIMA has decided to “Piggyback” its meeting with National PIMA in New Orleans. Dixie PIMA's Annual Business Meeting takes place Sunday, June 27, at 3:30 pm at the Sheraton Hotel, followed by a dinner banquet recognizing the new slate of officers, exchange of chairs, scholarship recipients, and special awards. Members should watch for a separate mailing offering more event details. Dixie PIMA members hope attendees will take the opportunity to come to its meeting and stay over to observe and participate in the National PIMA convention. Mark your calendar today!

Sam Cobb,
Chair/Dixie Southern

Jay Martin,
Chair/Dixie Southeastern

Gary Bone,
Chair/Dixie Sales Society

PIMA would like to welcome all new and renewed Affiliate Firm and Corporate Members

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Southern Environmental
(South Portland, ME)
Southern Environmental Inc
(Pensacola, FL)
Steel Plant Equipment Corp
Stowe Woodward LLC
Thiele Kaolin Co
TietoEnator MAJIQ Inc
Voith Paper Inc
Warehouse Specialists Inc
Western Polymer Corp
Williams-Gray Co Inc

Industry Calendar

April 22-23, 2004

Auburn Pulp and Paper Foundation Meeting and Golf Tournament

Contact Barbara Michael
334/844-2016

June 8-11, 2004

45th Annual University of Maine Pulp & Paper Summer Institute

For more information, please
go to <http://www.maine-pulper.org>

October 21-22, 2004

NCSU College of Natural Resources 75th Anniversary

For more information, go to
<http://natural-resources.ncsu.edu>.

NCSU Pulp and Paper Founda- tion 50th Anniversary

For more information, please
contact the Foundation

Upcoming Training Opportunities from PIMA and CPBIS

Webcasts

Manufacturing Reliability

April 21—Fundamentals of PM to Assess
Paper Machine Conditions (Part 2)

May 5—How to Do a Root Cause
Analysis Fast and Accurately Using
Software

May 19—How Reliability Improves
Safety in the Workplace

Courses

May 10-14—Management Develop-
ment for Enhanced Performance (in
Atlanta, GA.)

*For more details regarding training
opportunities, visit us at
www.pimaweb.org.*

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