

Catalog of Paper Mills in WA and OR



Revenue
\$41.7bn

Profit
\$1.8bn

Annual Growth 13–18
-4.1%

Exports
\$2.7bn

Annual Growth 18–23
-1.7%

Businesses
196

(American paper mills as of 2018)

Barriers to Entry checklist

Competition	High
Concentration	Low
Life Cycle Stage	Decline
Capital Intensity	Medium
Technology Change	Medium
Regulation & Policy	Heavy
Industry Assistance	Medium

SOURCE: WWW.IBISWORLD.COM

THE PAPER MILL INDUSTRY AT A GLANCE



Catalog of Working Paper Mills

17 currently operating paper mills in WA and OR

- ◆ Mills currently accepting post-consumer fiber
- ◆ Mills NOT currently accepting post-consumer fiber

Map of Paper Mills in WA and OR State (2018)



Catalog of Working Paper Mills

Map of Paper Mills in WA and OR State (2018)

- ◆ 10 paper mills accepting post-consumer paper fiber
 - 6 of which accept only corrugated cardboard (OCC)

GP Halsey, Inland Empire, NORPAC, and Sonoco: only mills accepting other paper fibers

Only NORPAC and Sonoco accepting MIX grade paper



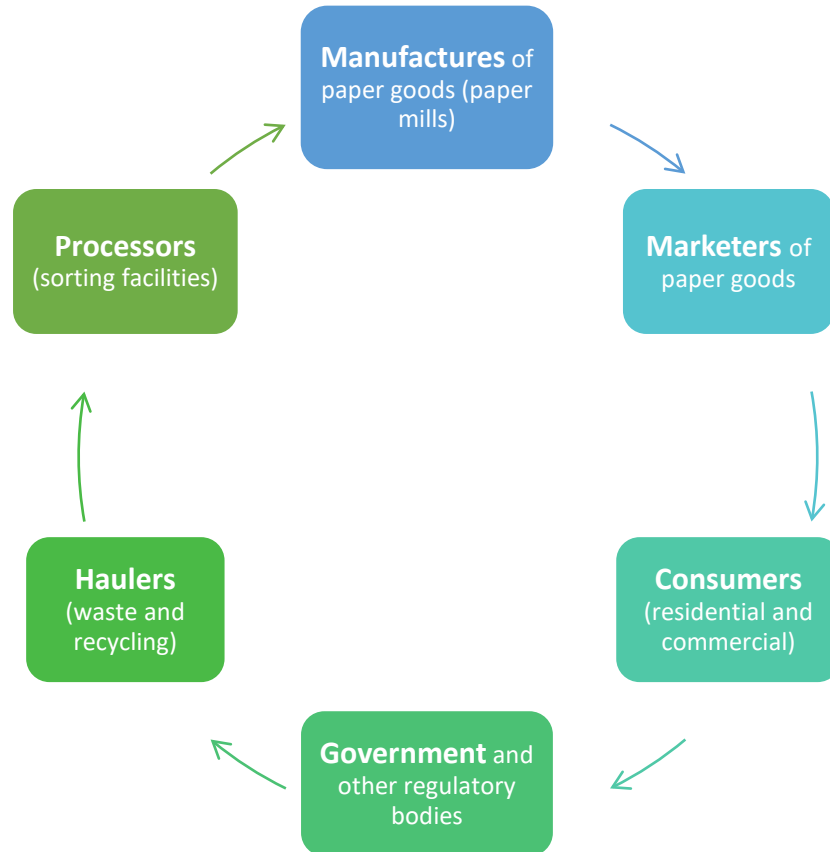
Type(s) of Post-Consumer Material Accepted	Company Name	City	State
High-Grade Paper Fiber	Georgia-Pacific Corp - Halsey	Halsey	OR
Old newsprint	Inland Empire Paper Co	Spokane	WA
Mixed paper, Old magazine grade, Old newsprint, Sorted office paper	North Pacific Paper Corp (NORPAC)	Longview	WA
OCC, Old Newsprint, Mixed paper, All Book Grades, Telephone Directories	Sonoco Products Co	Sumner	WA
OCC (Old Corrugated Cardboard)	Georgia-Pacific Corp - Toledo	Toledo	OR
OCC	Caraustar Industries	Tacoma	WA
OCC	International Paper Co	Springfield	OR
OCC	Kapstone Paper & Packaging Corporation	Longview	WA
OCC	Port Townsend Paper Corp	Port Townsend	WA
OCC	WestRock Co.	Tacoma	WA
NONE	Boise Paper	Wallula	WA
NONE	Clearwater Paper Corp	Lewiston	ID
NONE	Cosmo Specialty Fibers Inc	Cosmopolis	WA
NONE	Georgia-Pacific Corp - Camas	Camas	WA
NONE	Georgia-Pacific Corp - Wauna	Clatskanie	OR
NONE	Nippon Dynawave PackagingCo	Longview	WA
NONE	Ponderay Newsprint Co	Usk	WA
Closed	WestRock Co.	Newburg	OR
Closed but may reopen	McKinley Paper / old Nippon	Port Angeles	WA

Challenges to Paper Mill Expansion

- Glass contamination
 - A “death nail” to the paper recycling process
- Regulation and PCBs
 - Inland Empire reducing production
- Wax-coated and aseptic containers
- “\$10-40M” in paper mill upgrades in order to process more post-consumer paper (Gee 2018)



Future Steps



Some Expansion

- Potential new mills in Port Angeles and Newberg

Success depends on system-wide collaboration



Map of Paper Mills in WA and OR State (2018)

Thank You!

Eric Elliott

Seattle University Facilities

Recycling Shop

elliotte@seattleu.edu



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