



Global Forest and Paper Summit 2005

The Future of the Global Forest and Paper Industry

JUNE 1–3, 2005
VANCOUVER, BRITISH COLUMBIA,
CANADA

Summit 2005 is a series of forest and paper industry conferences and events over three days that will bring together senior executives from companies involved in forestry, wood products, pulp and paper products and packaging plus customers, suppliers, NGOs and government policymakers. The Summit will provide an opportunity for industry leaders to discuss the current state of the industry and identify opportunities and challenges to be met over the next decade.

www.globalforestpapersummit.com

Forest Products
Association of Canada



Association des produits
forestiers du Canada

PRICEWATERHOUSECOOPERS



summit2005 Conference Program



Agenda June 1, 2 & 3, 2005

WEDNESDAY*	THURSDAY	FRIDAY
PricewaterhouseCoopers' Conference: Delivering the Bottom Line	Vision 2015 Conference – Day 1 The Global Forest and Paper Industry's Coming Decade	Vision 2015 Conference – Day 2 and WPN Best Practices in Communications Forum
Morning 7:00 Registration & Continental Breakfast 8:00 Opening Keynote Address 8:40 Financial Performance & Economic Outlook 10:00 Coffee Break 10:30 Supply Chain & Market Dynamics	Morning 7:00 Registration Opens 8:30 Welcoming Remarks & Keynote Address 10:00 Coffee Break 10:30 CEO Armchair Dialogue: The Promises & Perils of the Coming Decade	Morning 7:00 Registration Opens 7:15 Best Practices Forum Networking Breakfast 8:30 **The Future of Construction and Wood Products: Outlook 2015 The Future of Paper in Communications: Outlook 2015
Lunch 12:30 Networking Reception 1:00 Lunch and Luncheon Speaker	Lunch 12:00 Lunch Break	10:30 Coffee Break 10:45 Growing the Market: Strategies for Increasing Consumption of Paper & Wood 12:00 Vision 2015 Closing Remarks Accelerating the Pace of Change: Strategies for Meeting the Demands of Tomorrow
Afternoon 2:30 Executive Perspectives 4:30 Closing Comments 4:45 Adjourn to Reception	Afternoon 1:30 The Forest & Paper Sector: Sustainability 2015 3:00 Coffee Break 3:30 Globalization and the Future of Global Trade in Forest & Paper Products	
Evening 4:45 Summit 2005 Reception: TO Flagship social function for 7:00 Summit 2005 delegates and speakers	Evening 6:30 WPN Best Practices Forum Welcome Reception & Opening Session: Best Practices in Crisis Communications: Learning from Other Industries and the Media	Lunch 12:15 Vision 2015 Closing Lunch 12:15 Best Practices Forum Lunch
		Afternoon 1:30 Best Practices in Forest and Wood Communications: Winning Programs from Around the World (Part 1) 3:00 Coffee Break 3:30 Best Practices in Forest and Wood Communications: Winning Programs from Around the World (Part 2)
		Evening 5:30 Best Practices Forum TO 7:30 Closing Dinner

** Select one of these two concurrent sessions

PricewaterhouseCoopers' Global Forest and Paper Industry Conference Delivering the Bottom Line

JUNE 1, 2005

PricewaterhouseCoopers' Global Forest and Paper Industry Conference, now in its 18th year, is recognized by leading industry executives as a not-to-be-missed event. This year's conference, with the theme of *Delivering the Bottom Line*, sets the stage for many of the topics to be covered at the Vision 2015 Conference.



As the forest and paper sector begins to recover from a multi-year slump, it is more important than ever to fine-tune your business for optimum performance. PricewaterhouseCoopers' 18th Annual Global Forest and Paper Industry Conference will focus on how producers can improve performance and deliver bottom line results in a measurable, sustainable manner. Join us as we examine market, shareholder and competitive pressures and trends shaping the global forest and paper sector and hear recognized industry leaders' insights through a series of panel discussions.

Presented by

PricewaterhouseCoopers LLP is recognized for its depth and breadth of global forest and paper industry expertise, and extensive experience with public and private companies, governments and industry. PricewaterhouseCoopers provides industry-focused audit

and assurance, advisory and tax services for public, private and government clients in all markets. More than 120,000 people in 139 countries connect their thinking, experience and solutions to build public trust and enhance value for clients and their stakeholders.

Delivering the Bottom Line

AGENDA: WEDNESDAY, JUNE 1

7:00 AM	Registration & Continental Breakfast	<i>Moderator</i> Kevin Bromley Leader, Forest Investment Account PricewaterhouseCoopers LLP Vancouver, Canada
8:00 AM	Opening Keynote Address Delivering the Bottom Line Stan Bracken-Horrocks Leader, Global Forest & Paper Practice PricewaterhouseCoopers LLP Vancouver, Canada Thomas A. Russo Vice Chairman Lehman Brothers Inc. New York, USA	12:30 PM Networking Reception
		1:00 PM Lunch & Luncheon Speaker The Hon. David Emerson Minister of Industry Government of Canada Ottawa, Canada
8:40 AM	Financial Performance & Economic Outlook Financial experts and industry analysts will present insights on trends and issues shaping the forest and paper industry. <i>Panelists</i> Craig Campbell Leader, Performance Improvement, Global Forest & Paper Practice, PricewaterhouseCoopers LLP Vancouver, Canada Richard Nilsson Financial Analyst Enskilda Securities Stockholm, Sweden H.C. Bowen Smith Senior Advisor Greenhill and Co., Inc. New York, USA <i>Moderator</i> Dave Thompson Senior Manager, Global Forest & Paper Practice PricewaterhouseCoopers LLP Edmonton, Canada	2:30 PM Executive Perspectives CEOs from leading forest and paper companies will discuss their successes and how they are working to lower costs, improve returns on investments and adapt to changing market demands. <i>Panelists</i> John V. Faraci Chairman and CEO International Paper Co. Stamford, USA Henry H. Ketcham Chairman, President and CEO West Fraser Timber Co. Ltd. Vancouver, Canada Jim Shepherd President and CEO Canfor Corporation Vancouver, Canada W. Thomas Stephens Chairman and CEO Boise Cascade, LLC Denver, USA Lee M. Thomas President and COO Georgia-Pacific Corporation Atlanta, USA <i>Moderator</i> Bruce McIntyre Leader, Sustainability, Global Forest & Paper Practice, PricewaterhouseCoopers LLP Vancouver, Canada Marc Silverman U.S. Leader, Global Forest & Paper Practice, PricewaterhouseCoopers LLP Stamford, USA
10:30 AM	Supply Chain & Market Dynamics Producers, customers and suppliers will exchange perspectives on focusing resources to have the greatest impact on the bottom line. <i>Panelists</i> David Campi Global Commodities Procurement Director Sears, Roebuck & Co. and Lands' End Dodgeville, USA Ray Foot Vice President, Marketing & Sales Merchandise Canadian Pacific Railway Calgary, Canada Timo Teräs Senior Consultant Jaakko Pöyry Consulting Vantaa, Finland Robert W. Taylor Vice-President, Softwood Lumber Weyerhaeuser Company Federal Way, USA (invited)	4:30 PM PwC Conference Closing Remarks J. Frank Brown Global Leader, Advisory Services PricewaterhouseCoopers LLP New York, USA
		4:45 PM TO 7:00 PM Summit 2005 Reception The flagship social function of the Summit 2005 Conference, this reception takes place after the close of the PwC Conference and serves to kick-off the Vision 2015 Conference. This fun and engaging event will provide a relaxed environment ideal for delegates to meet fellow participants.



Vision 2015

The Global Forest and Paper Industry's Coming Decade

THURSDAY, JUNE 2 & FRIDAY, JUNE 3

The first event of its kind, Vision 2015 is an elite global gathering of senior representatives of the forest and paper sector's major stakeholders: producers, customers, civil society groups, policy makers and financiers. Their purpose is to explore together the key issues, challenges and opportunities that will confront the global forest and paper industry over the coming decade.



Presented by

Forest Products Association of Canada (FPAC) is the voice of Canada's wood, pulp, and paper producers nationally and internationally in government, trade, and environmental affairs. Canada's forest industry represents 3 percent of Canada's GDP and exports \$40 billion of wood, pulp and paper annually. The industry is one of Canada's largest employers, operating in over 1,200 Canadian communities and providing over 900,000 direct and indirect jobs across the country.

The American Forest & Paper Association (AF&PA) is the national trade association of the forest, pulp, paper, paperboard and wood products industry. AF&PA's members include manufacturers of over 80 percent of the paper, wood and forest products produced in the United States.

The Confederation of European Paper Industries (CEPI) is a non-profit organization representing 19 member countries (16 European Union Member States plus Norway, Switzerland and the Slovak Republic, an associate member). CEPI represents some 900 pulp, paper and board-producing companies from across Europe through member countries.

The main goal of The International Council of Forest and Paper Associations (ICFPA) is to serve as a forum for joint action in areas ranging from communications to data collection. ICFPA's membership includes trade associations in 43 countries representing industries accounting for more than 90 percent of the world's paper and more than 50 percent of the world's wood production.

Vision 2015

AGENDA: THURSDAY, JUNE 2

7:00 AM	Registration Opens		Panelists Tzeporah Berman Program Director ForestEthics Smithers, BC Leif Brodén President & CEO Sodra Group Växjö, Sweden Gary W. Dunning Executive Director The Forests Dialogue New Haven, USA David Refkin Director of Sustainable Development Time Inc. New York, USA Moderator Teresa Presas Managing Director Confederation of European Paper Industries Brussels, Belgium
8:30 AM	Opening Keynote: The Global Forest & Paper Industry's Coming Decade Leading visionaries will present their views on global trends that will shape the industry world-wide over the next 10 years. Welcoming Remarks The Honourable Gordon Campbell Premier of British Columbia (invited) The Honourable John Efford Minister of Natural Resources Government of Canada Ottawa, Canada (invited) Keynote Speaker Ken Courtis Vice-Chairman Goldman Sachs (Asia) L.L.C. Hong Kong		
10:30 AM	CEO Armchair Dialogue: The Promise & Perils of the Coming Decade This candid interaction will provide insights on the most critical emerging issues facing the industry over the next decade from the Chief Executive level. Panelists Jan Åström President & CEO Svenska Cellulosa Aktiebolaget SCA Stockholm, Sweden Carlos Aguiar CEO Aracruz Rio de Janeiro, Brazil Steven Rogel Chairman, President & CEO Weyerhaeuser Company Federal Way, USA John Weaver Chairman & CEO Abitibi-Consolidated Inc. Montreal, Canada Moderator Avrim Lazar President & CEO Forest Products Association of Canada (FPAC) Ottawa, Canada	3:30 PM	Globalization and the Future of Global Trade in Forest & Paper Products Patterns of global trade, investment and market growth have been changing rapidly, with the emergence of strong new suppliers and rapid growth in emerging economies. How will trade patterns evolve over the next decade? How is the Russia-China market evolving and will it stay in balance? Panelists Ambassador Luiz Felipe Lampreia Former Brazilian Minister of State for Foreign Affairs Brazil Lees Seymour Managing Director Weyerhaeuser Nelson, New Zealand Lyn Withey VP Public Affairs International Paper Co. Stamford, USA Moderator W. Henson Moore President & CEO American Forest & Paper Association Washington, USA
1:30 PM	The Forest & Paper Sector: Sustainability 2015 Issues of sustainability are both an asset and a challenge for the forest and paper industries. The ever-changing expectations of society, policymakers and customers shape the industry's practices, cost structure and market demand.		

Vision 2015

AGENDA: FRIDAY, JUNE 3

7:00 AM	Registration Opens	<i>Moderator</i> Russ Horner President & CEO NorskeCanada Vancouver, Canada
8:30 AM*	The Future of Construction and Wood Products: Outlook 2015 <i>Joint session with WPN.</i> The market for solid wood products is changing, with new emerging markets and technologies, shifts in supply chains and consolidation of buyers in North America and Europe. How will the business models of homebuilders, retailers and buyers evolve over the next decade? What strategies can be deployed to increase demand in established markets, respond to changes in the supply chain, and tap into emerging high growth markets? <i>Panelists</i> Robert Malczyk Principal Structural Engineer Equilibrium Consulting Vancouver, Canada Dick Rose Senior VP Logistics Stock Building Supply Raleigh, USA Lars-Göran Sandberg Chairman & CEO Timwood AB Stockholm, Sweden <i>Moderator</i> Ian de la Roche President & CEO Forintek Canada Corp. Vancouver, Canada	10:45 AM Growing the Market: Strategies for Increasing Consumption of Paper & Wood Products <i>Joint session with WPN.</i> In virtually every major end use, forest products face competition from other materials of media. What can the global forest industry do to promote its products as the material of choice in both traditional and non-traditional end uses? What can we learn from past promotional efforts? Looking to the future, what are the key issues and challenges facing the industry in "growing the market"? <i>Panelists</i> Bo Borgström President Moelven Industrier ASA Moelv, Norway Mark Suwyn President, Marsuw LLC Chairman, EBS LLC; Former Chairman & CEO Louisiana-Pacific Corp. Nashville, USA
8:30 AM*	The Future of Paper in Communication: Outlook 2015 Rapid advances in information technology, heightened customer pressure, new types of packaging, new technologies and rapidly growing consumer markets in developing economies – all are influencing the market for pulp and paper products worldwide. How will these trends play out over the next 10 years? How must the industry adjust to better serve customer needs and requirements? <i>Panelists</i> Dan Dowis General Manager, Newsprint & Supply Knight Ridder Miami, USA Pierre Gorse Director Carrefour, Müllheim Baden, Germany John T. Dixon Americas Forest & Paper Industry Lead IBM Business Consulting Services Charlotte, USA	12:00 PM Vision 2015 Conference Closing Remarks Accelerating the Pace of Change: Strategies for Meeting the Demands of Tomorrow 12:15 PM Closing Luncheon <i>Keynote Speaker</i> Claude Martin Director General World Wildlife Fund International Switzerland

Wood Promotion Network

AGENDA: THURSDAY, JUNE 2 & FRIDAY, JUNE 3

THURSDAY, JUNE 2

6:30 PM

Evening Welcome Reception & Opening Session

Best Practices in Crisis Communications: Learning from Other Industries and the Media

Speakers

Jack Leslie
Chairman
Weber Shandwick Worldwide, USA

Wendy Mesley
Broadcast Journalist
Canadian Broadcasting Corp. (CBC), Canada

Mark Suwyn
President, Marsuw LLC
Chairman, EBS LLC; Former Chairman & CEO Louisiana-Pacific Corp., USA

12:15 PM

Special Keynote Luncheon

The 2010 Winter Olympics: An Opportunity for the Forest Products Industry

Speaker

Kelly McCloskey
President & CEO
Wood Promotion Network

FRIDAY, JUNE 3

7:15 AM

Networking Breakfast

Market Research Results: Acceptance of Forest Products in Asia, Europe and North America

Speaker

Bruce Anderson
President & CEO
Decima Research Inc., Canada

8:30 AM

Joint Session with Vision 2015: The Future of Construction and Wood Products

Panelists

Robert Malczyk
Principal Structural Engineer
Equilibrium Consulting, Canada

Dick Rose
Senior VP Logistics
Stock Building Supply, USA

Lars-Göran Sandberg
Chairman & CEO
Timwood AB, Sweden

Moderator

Ian de la Roche
President & CEO
Forintek Canada Corp., Canada

10:45 AM

Joint Session with Vision 2015: Growing the Market: Strategies for Increasing Consumption of Paper and Wood Products

Panelists

Bo Borgström
President
Moelven Industrier ASA, Norway

Panelists

Bo Borgström
President
Moelven Industrier, Norway

Per-Ove Engelbrecht
Head of the European Commission Forest-Based Industries Unit, Brussels

David Ford
President & CEO
Metafore, USA

Ward Hubbell
Executive Director
Green Building Initiative, USA

Les Jozsa
"The Wood Guy"
Forintek Canada Corp., Canada

Nick Livanes
Manager Market Development
Timber Development Association, Australia

Jean-Pierre Martel
Sr Vice President, Sustainability
Forest Products Association of Canada (FPAC)

Pauline Rochefort
President
Canadian Wood Council, Canada

Jan Söderlind
Managing Director
Nordic Timber Council, Norway

Mark Suwyn
President, Marsuw LLC;
Chairman, EBS LLC; Former Chairman & CEO Louisiana-Pacific Corp., USA

5:30 PM
TO
7:30 PM

Best Practices Forum

Closing Dinner - Optional Wood Promotion Network



Canada^{ca}



For more information, please contact:

Summit 2005
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