

firmly
impressed
on
the public's
memory

S. D. WARREN COMPANY, 89 BROAD STREET, BOSTON, MASS.

[Better Paper



Better Printing]

Printing Papers

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FIRMLY impressed on the public's memory is the name of a liveryman—one Hobson—who earned distinction by conducting his business in accord with an inflexible policy.

A customer that elected to rent a horse from Thomas Hobson was not allowed the privilege of comparing or selecting. He was arbitrarily allotted the horse of Mr. Hobson's choice—which was, invariably, the horse nearest the stable door. The customer was required to accept that horse or none, because Hobson's choice allowed no alternative.

Mr. Hobson's persistent application of his unique policy familiarized contemporary Londoners with the arbitrary quality of his selections and allotments, and prompted them to apply the term "Hobson's choice" to all circumstances that allowed no alternative. Thus, Mr. Hobson impressed his name on the public's memory.

* * *

Current conditions expose American business to the risk of duplicating Mr. Hobson's accomplishment.

Current conditions make it impossible for manufacturers to fill all of the needs of *all* customers, and require them to ap-

portion capacities and to allot goods to their trades. Of necessity, customers must accept the allotments, and make the best of them—whether they are adequate or not.

Thus, current conditions force American businesses to apply Hobson's procedure, and to incur the risk that they may impress their names on the public's memory as symbols for arbitrary action.

PRESUMABLY, buyers understand that conditions, which now restrict the flow of goods, were not created by business, and cannot be overcome by business. The public knows that an appreciable proportion of industrial production is being consumed in the construction of facilities for defense. Customers of non-defense industries are aware that the spontaneous demand for goods, induced by expanding needs and fear of shortages, is greatly in excess of capacities.

Presumably, customers will take these things into account, and will regard, with sympathy and tolerance, all efforts of business to make equitable distribution of available goods.

But *will* they?

Customers look to their regular suppliers for unstinted support in emergencies. Customers that have been steadfast in their allegiance to selected manufacturers during subnormal

business periods expect to be "taken care of" by those manufacturers when goods become scarce. If and when those customers find it necessary to curtail *their* production, because the materials allotted by their regular suppliers fall short of their needs, their sympathy and tolerance may not be adequate to balance their resentment.

Of course, the businesses that have established permanent customer relationships by respecting obligations will make every effort to "take care of" them. Those businesses will commit themselves exclusively to the serving of their established accounts; they will apportion their production so that an equitable share may be made available to each customer; they will refuse to supply one customer disproportionately at the expense of others. Yet, peculiarly, those procedures for assuring equity will create the causes for resentment.

Commitment of the facilities of a business to old established accounts exclusively, necessitates the rejection of orders proffered by potential customers, and exposes the business to the resentments of those potential customers.

The apportionment of capacities in the interest of *all* of the regular customers of a business necessarily places top limits on the volume of goods available to each, and requires that orders in excess of those limits be rejected. Thus in the process of "taking care of" customers equitably, a business must also re-

strict them; and though some of the customers will be grateful for the protection afforded by apportionment, others will be resentful of the restriction.

Furthermore, customers that are disposed to be resentful will find encouragement for their resentments.

In all industries there are opportunistic businesses that possess few permanent customer relationships, and that recognize no obligations. Those opportunists retain freedom to supply goods whenever and wherever a temporary profit or strategic advantage may be gained. With no commitments to supply the *basic needs* of any customer, those businesses can freely serve the emergency needs of many buyers, thus obligating the buyers for emergency service, and, at the same time, encouraging them to be resentful that their regular suppliers were not equally generous.

One way or another, current conditions will subject the sympathy and tolerance of customers to pressures and strains; and some proportion of resentments will be incurred by American businesses despite equitable policies.

* * *

Of course, the effect of customer resentments will not be felt by businesses while the demand for goods exceeds the supply. So long as that condition exists, necessity will prompt

customers to court suppliers. The effect of resentments will become apparent later, when businesses will need orders.

At that time, individual businesses that have denied themselves the privilege of seeking and securing customer replacements will be completely dependent on their old customers for support during the period of readjustment. Some businesses will receive the support in generous measure; others, that have applied similar policies, will suffer from the lack of it.

It will then be possible for businesses to scan their policies for the distinctions that caused some of them to win customer appreciation, while others were incurring an undue proportion of resentments. Very likely, the major distinction will be found in the fact that some businesses *presumed* that customers would understand conditions, and regard them sympathetically and with tolerance; and that other businesses presumed not at all, but explained conditions to customers at frequent intervals to *make certain* that they would understand.

AT a later date, when businesses will need orders, it will be *too* late to alter customer viewpoints and to liquidate resentments by making explanations in retrospect. Now, while viewpoints are in the making, explanations can have effect.

The nature of the explanations that need to be made is clearly indicated.

First of all, customers want to know the real facts about the disposal of goods. If the government is consuming an appreciable proportion of a supplier's production, that is one thing; but if *defense* is merely an absolving slogan rather than a production fact, that is something else again.

There is some curiosity regarding exports—are suppliers developing established export markets normally, or are they following opportunistic policies at the expense of old established domestic customers?

Always in the minds of customers is the question, "Is the apportionment truly equitable, or are the *big* customers getting a disproportionate share?"

Customers of non-defense industries are especially curious. In many non-defense industries the demand for goods increased stealthily and unobserved until it passed capacities; and even now large numbers of customers are mystified by a condition that clearly exists, yet is scarcely credible.

Explanations of these things are more or less a standard re-

quirement of all businesses. Explanations of matters pertaining to individual businesses are also required, and the nature of these can be determined by observing the patterns of the expressions of customers.

The method for making proper explanations is also clearly indicated. First, it is necessary to write them—thoughtfully, honestly, and in detail. Second, it is necessary to print them in the quantities required for distribution to all sales correspondents, salesmen, customers, and potential customers of the future. Third, it is necessary to repeat the procedure at frequent intervals.

This paper is Warren's CUMBERLAND GLOSS (Folding Enamel) White, 25 x 38-80

Information

Report of Conditions
in the
Book Paper Industry
October, 1941



Facts about
Warren's Standard
Printing Papers



Report of Conditions in the Book Paper Industry to OCTOBER, 1941

CAPACITIES

In the latter months of the last war, the book paper industry operated to capacity, but the paper that was delivered was not consumed, and the inventories that were accumulated by buyers of paper remained (and suffered considerable depreciation in value) after the emergency ended.

Since that time, the capacity of the book paper industry has been appreciably increased, and never consumed in any year. There is no substantial evidence that the *actual current requirements* of the users of book paper can now equal the production capacities of the industry.

RECENT DEVELOPMENTS

The orders received by the various mills in the book paper industry averaged 77% of capacity in the year 1940.

The market became firm in February and March, 1941, and by April, capacity operation was achieved by almost all of the book paper mills.

Until late in April, the increase in demand was gradual; it was due to an expansion of consumption in a few divisions of the industry, and to a modest anticipation of future needs; but it was by no means general, and many buyers were unaware of it. Many paper manufacturers and merchandisers believed the increase to be only a temporary flurry; a few believed that it would continue; but none, or almost none, expected it to accelerate suddenly.

However, once the industry reached capacity operation, a lengthening of the time required to make deliveries followed; and customers, who became alarmed by the possibility that printing jobs would be delayed, hastily entered orders for anticipated needs. In the brief period of a few weeks, the volume of orders entered with the mills of the industry exceeded their capacities.

At that point the paper mills sought to restrict advance buying and to defer *anticipated* needs so that production could be confined to orders representing *immediate* needs; but simultaneously, government bureaus released warnings of the possibility of shortages of materials and transportation some time in 1942. These warnings sounded a general alarm throughout the paper consuming markets, and before the mills could apply reasonable and sympathetic restrictive procedures, they were overwhelmed with a great volume of orders. It was then too late to effect restrictions in sympathetic fashion, and so, progressively, mills withdrew from the market to gain time to establish some degree of order in production schedules.

Order is being established, and though the procedure for establishing it has imposed hardships on many customers, progress is being made. It may be assumed that every paper mill and every paper merchant is keenly conscious of

unfavorable customer reactions to delayed deliveries; and it can be taken for granted that all available facilities are being employed to establish order and to restore service to a reliable basis.

CURRENT DEMAND FOR BOOK PAPER

There has been a *small* increase in the *actual consumption* of coated and uncoated book papers.

Circulations of some technical publications have increased.

Priority restrictions on metal foils, heretofore used as packaging materials, make it necessary for manufacturers to return to the use of paper for packaging their goods; and so the consumption of paper for packaging has increased.

Lease-land shipment of canned foods, and purchase of canned foods for household stocks, have resulted in an increase of the consumption of labels.

But meanwhile the printing industry generally has not been busy, and the sales of printing ink have not increased appreciably; and these two circumstances indicate that the current demand for paper is greatly in excess of current needs. This conclusion is attested by the fact that sizable inventories of paper have accumulated in the warehouses of buyers.

It is evident, therefore, that the abnormal demand for book paper in the past five months has been largely an artificial demand induced by fear of shortages.

SHORTAGES AND RUMORS OF SHORTAGES

Speculative discussions of possible shortages that *may* be caused by defense activities have created misunderstanding about the availability of printing papers and of materials for making them. Rumors have confused facts and speculation.

The paper industry is a combination of numerous kinds of producers that use different materials, and that make papers for different uses. Some of these divisions of the industry have been affected very little by defense activities; other divisions have been affected considerably.

The kraft paper division of the paper industry has been called upon to supply the government with great quantities of paper for wrappings, bags, and cartons for packing munitions and supplies, and for shipment abroad as "lease-land" materials; the government demand for blueprint paper, mimeograph paper and writings has been great; but the government's requirement for book papers has been only slightly above normal.

Some divisions of the paper industry have suffered shortages of materials, and others have not. Manufacturers of specialty papers that are made of imported specialty pulps have had difficulty getting the pulps; manufacturers of certain kinds of decorative papers are unable to acquire essential chemicals and colors, and are now consuming their inventories of those materials; manufacturers that convert old papers into board and paper products are having difficulty getting the old papers.

Therefore, conditions in each division of the industry must be appraised independently.

Facts about Book Paper Materials—to Date

The book paper mills of the United States have operated at capacity since early summer, and have maintained their standards of quality. That fact indicates that there has been no shortage of essential materials for book paper.

Much has been said about the curtailment of importations of paper pulp; but while America imported pulps, it also exported them, and even then American pulp makers operated appreciably under capacities. Imported pulps for the making of book papers were low cost pulps, and the substitution of domestic pulps merely increased material costs. To date, the American manufacturers of virgin pulps have been able to supply capacity requirements of the paper industry, to supply the needs of the rayon industry, and to supply the government's requirements for munitions and for "lease-lend" exportation.

Importation of low-cost subordinate materials for use in the making of book paper has been curtailed, but the materials may be had, at higher costs, from domestic producers.

Certain chemicals essential in book paper making are now priorities materials, but, to date, these materials have been procurable.

IMMEDIATE FUTURE

Chlorine, which is used in bleaching pulps to make them bright, has been placed on the priorities list, and its use in pulp making has been restricted.

A reduction of the volume of chlorine used in bleaching pulps will rob papers of some measure of their brightness, but will not subtract from printability. As inventories of bright pulp are consumed, and new pulps come into use, the brightness of paper will decline by degrees. It is probable that the decline will begin in November, 1941.

FUTURE POSSIBILITIES

Future possibilities will be determined by the government's opinion of the importance of maintaining a supporting economy to finance defense expenditures. Therefore, a discussion of the future possibilities of shortages in book paper materials can be only speculative.

Certain chemicals used in the manufacture of book paper are becoming scarce. Meanwhile, inventories of those chemicals are being consumed, and it is not now known if government bureaus will provide for apportionment of needed chemicals, or if the materials will become unavailable. If the scarce chemicals cannot be had, substitutes will be employed.

Metals and metal parts needed for the repair and maintenance of paper making equipment are now secured only with difficulty. Meanwhile, mill inventories of parts are being used up. Ultimately, the productivity of paper mills

will be determined by the government's policy in respect to the distribution of metals for maintenance of equipment.

Inventories of book paper pulps are being consumed. Government purchases of pulps for munitions and for lease-lend shipments are expected to increase; and the pulp requirements of the rayon industry are expected to increase. It is possible that a shortage of pulps may develop in 1942.

Government spokesmen express fears of a shortage of transportation late in 1942. Other government spokesmen express the conviction that there will be no shortage.

All of these things are speculative possibilities. They are not, at the moment, facts. They may become facts, or they may not.

Warren Policy and Procedure

In October, 1940, the volume of orders received by S. D. Warren Company equalled the capacities of its mills, and this condition held through March, 1941. Orders for April and May, 1941, totaled more than capacity.

In June, 1941, the sudden and phenomenal demand for paper overwhelmed the Warren Company. Sympathetic and reasonable measures for restricting the flow of orders to the limits of mill capacities were applied late in June and through July, but the demand accelerated so greatly that those measures proved inadequate. Early in August, it became necessary for the Warren Company to withdraw from the market temporarily for the purpose of clearing some part of the accumulation of orders.

Meanwhile, the mechanics for allotting production, which were employed with good effect by the Warren Company from 1916 to 1920, were readjusted to conform to present conditions, and were made effective in September. On October 1, 1941, the Warren Company re-entered the market.

As the accumulation of orders is cleared, Warren service to its customers will improve progressively, and the needs of the customers will be filled more promptly.

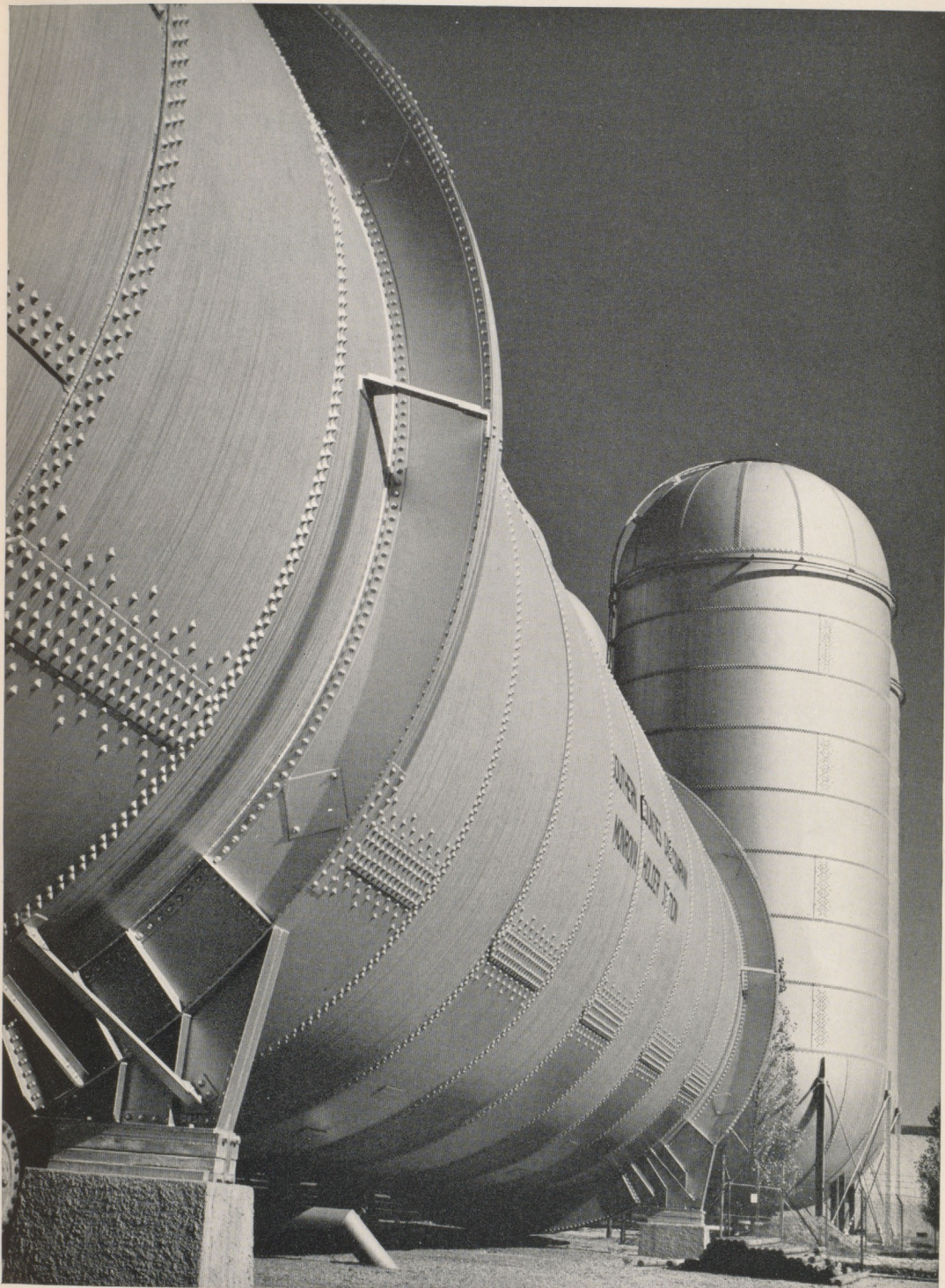
POLICY

S. D. Warren Company has committed itself to its *established customers* so long as their need for paper equals the capacities of the Warren mills.

The capacities of the Warren mills have been allotted to established customers proportionately in relation to the volume normally required by each. To the extent that it is humanly possible for S. D. Warren Company and Warren merchants to distribute Warren papers equitably among all customers, that will be done.

WARREN'S CUMBERLAND GLOSS

A distinctive characteristic of Warren's Cumberland Gloss is its unusually quick affinity for ink, which aids in the printing of fine half-tones by letterpress.



133 line screen halftone

CUSHING-GELLATLY photograph

WARREN'S CUMBERLAND GLOSS

The quick affinity for ink, which is a distinguishing characteristic of this paper, is beneficial in the trapping of colors that are overprinted to produce full color reproductions.



133 line screen process color halftones

H. I. WILLIAMS photograph

This Characteristic Increases the Value of Warren's Standard Papers

All of Warren's standard coated letterpress papers possess an uncommon characteristic that can best be described as "*affinity for ink.*" This characteristic is beneficial to printers and advertisers. It minimizes mottling that is common in dark areas of halftones, it minimizes mottling in colors that are over-printed, and it minimizes offsetting. This characteristic can be demonstrated.

Print a solid plate in black ink on any one of Warren's coated letterpress papers, examine the print immediately in a clear light, and you will see that the ink has been absorbed uniformly and quickly. No pools of unabsorbed ink will be visible.

Print a solid plate in black ink on another coated paper, and examine it immediately in a clear light. If you observe an uneven absorption of ink, if tiny pools of unabsorbed ink appear in the print (repelled by unabsorbent coagulations in the coating), the paper has a poor affinity for ink. Eventually, these pools will be absorbed and disappear—perhaps in fifty seconds, or in one hundred seconds, or in two hundred seconds—but in the meantime they will have established the basis for mottling and offsetting.



PLATE 1—This diagram simulates the pattern of pools of wet ink as they appear immediately after printing.



PLATE 2—No pools appear on Warren's coated papers, because absorption of ink is uniform and rapid.

The "*affinity for ink*" that is possessed by Warren's coated papers is the natural result of the combination of pigments used in coating—and three of these pigments are exclusively Warren products.

An Important Quality that Cannot be Demonstrated in a Sample of Paper

Uniformity in the printing surface of the many sheets of paper contained in an order is necessary for the production of uniformly printed copies of advertising literature. Yet, uniformity is a quality that cannot be demonstrated in a sample of paper, nor in one order of paper.

Absolute uniformity has not yet been achieved by any paper maker, and a relatively high degree of uniformity is achieved only by means of precise mechanics and continuous testing. S. D. Warren Company has always regarded a high degree of uniformity in paper as a prime essential of fine quality, and has initiated many practices that have improved this quality. Some of these practices are listed below. These are manufacturing practices exclusively, and are supplementary to a great variety of material tests that are not listed here.

1. *Paper Machine Control.* The alert and continuous observation of the craftsmen who form Warren papers is supplemented by a series of instrument tests that measure the paper against a standard. The product of each paper machine is tested every half hour for nine important characteristics of quality; another characteristic is tested at intervals of two hours; and three other characteristics are tested at intervals of three hours. By this means, deviations from standards can be minimized.

2. *Coating and Calendering Control.* In the process of coating and calendering, all orders of Warren's standard coated papers are subjected to sixteen different tests at proper intervals. Five of the tests are visual measurements made by skilled craftsmen, and eleven tests are instrument measurements.

3. *Cutting.* All of Warren's standard coated-two-side papers are *single* roll cut—one sheet at a time. Where the *multiple* roll cutting practice is followed, sheets from three, four or five rolls are interleaved and cut as one. This practice produces economies at the expense of uniformity, whereas the Warren practice increases costs, but produces greater uniformity and greater value.

4. *Practical Use Tests.* S. D. Warren Company maintains a printing plant for testing purposes *only*. Sheets from every roll of coated paper manufactured at Cumberland Mills are printed on a cylinder press under practical conditions, and the prints are measured against an established standard. Sheets from every order of coated paper are enclosed in a dehumidifying chamber until they are adjusted to the dry condition that exists at a relative humidity of 20%; they are folded and stitched in this dry state, and measured against an established standard.

5. *Sorting.* All of Warren's coated papers are inspected one sheet at a time (coated-two-side papers are turned over and inspected on both sides). Trained inspectors watch for specified defects, and if any one of these defects is present in a sheet of coated paper, rejection is mandatory.

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Obviously, the relatively high degree of uniformity that results from this variety of practices cannot be reflected in a paper sample. Nor can a lower degree of uniformity be discerned in a sample of paper. The quality of uniformity cannot be compared in samples—it can be appreciated only through use and observation over a period of time.

This paper is Warren's CUMBERLAND GLOSS (Folding Enamel) White, 25x38-80
The cover of this booklet is Warren's CUMBERLAND GLOSS COVER, White, 20x26-80

WHERE PRINTERS CAN BUY

Warren's Standard Printing Papers and Warren's Standard Booklet Envelopes



These Leading Paper Merchants carry stocks

ALBANY, N. Y.	Hudson Valley Paper Company	OAKLAND, CAL.	Zellerbach Paper Company
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CHARLOTTE, N. C.	Caskie Paper Company, Inc.	PORTLAND, ME.	C. M. Rice Paper Company
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NEWARK, N. J.	Lathrop Paper Company, Inc.		
	{ Lathrop Paper Company, Inc.		
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	Lathrop Paper Company, Inc.		
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PHILIPPINE ISLANDS	A. C. Ransom Philippine Corporation



better
paper
better
printing

S. D. WARREN COMPANY



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