

Welcome members of KTAPPI

Indian Paper Industry

a journey well travelled



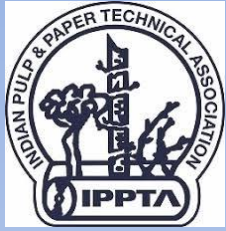
By



M.K.Goyal

Secretary General

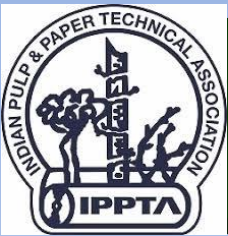
Indian Pulp & Paper Technical Association



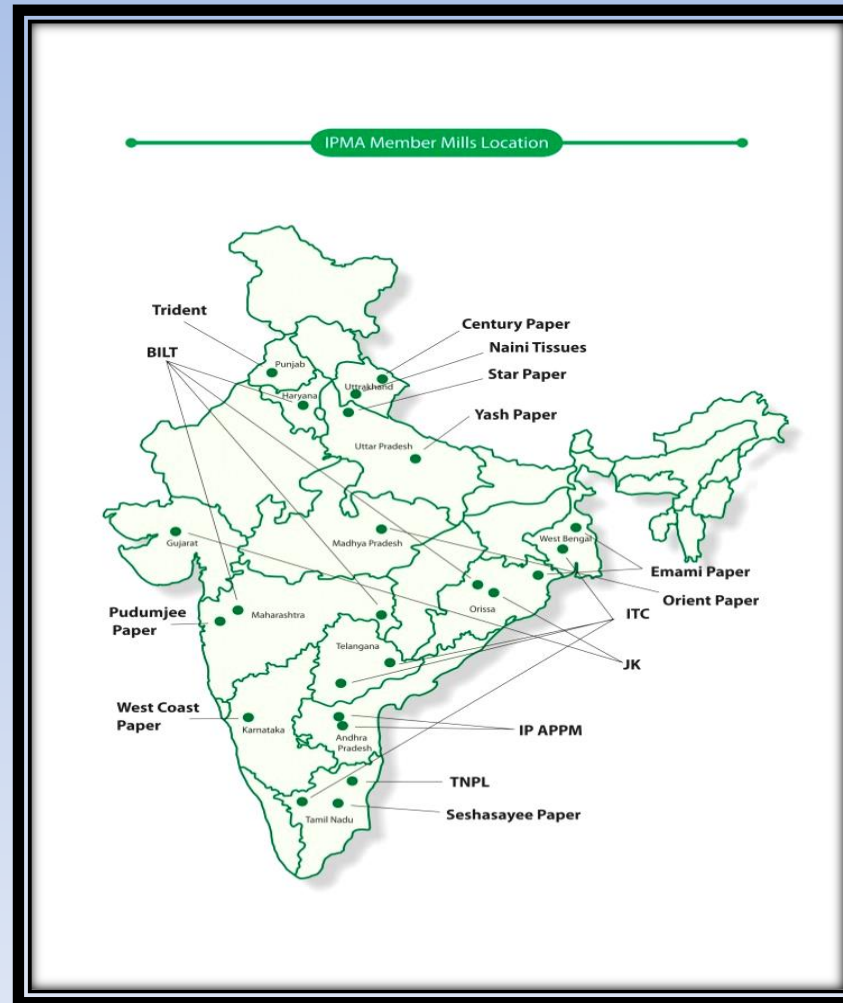
Indian Paper Industry

- Overall - 859 Paper Mills
- Production - 17 Million tonnes/annum
- Consumption - 19 Million tonnes/annum





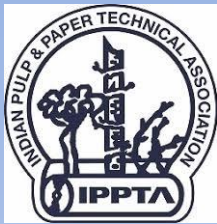
Major Pulp and Paper Mills in India





Growth of Indian Paper Mills in Nos 1951-2018





Big Units

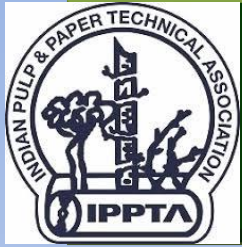
Sl. No.	Company	Production (MT)
1.	Ballarpur Industries Limited (BILT)	834050
2.	ITCLimited - PSPD	590000
3.	Tamil Nadu Newsprint & Papers Limited (TNPL)	371637
4.	The West Coast Paper Mills Limited	317808
5.	JK Paper Limited	292582
6.	The Andhra Pradesh Paper Mills Limited	258201
7.	Century Pulp and Paper	242906
8.	NR Agarwal Industries Limited	173072
9.	Seshasayee Paper & Boards Limited	169438
10.	Trident Limited	152719



Capacity Utilization

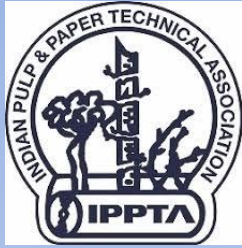
No. of Mills		859
Total Installed Capacity, million tons		25.55
Operating Installed Capacity , million tons		20.65
Production of Paper, Paperboard and Newsprint , million tons		16.91
Capacity Utilization, %		~80
No. of Running units		499
No. of Non Operational Units		360
Idle installed capacity, million tons		4.29
Per capita Consumption (kgs)		13.89
Contribution From Different Segments (million tons)		
Wood Based	Agro Based	Recycled Mills
3.27	1.61	12.03

Size based on Production volume



Sailient features of Indian Paper Mills

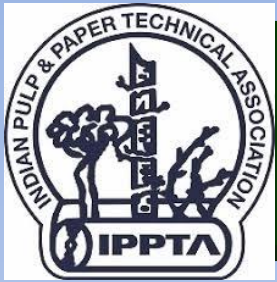
- Industry manufactures all grades of paper
- Backward linkages with the farming community with strong Agro forestry roots
- Compliant with Government's Environment Charter
- Annual turnover of over USD 8 billion
- Industry provides direct employment to 0.5 million persons, and indirectly to 1.5 million



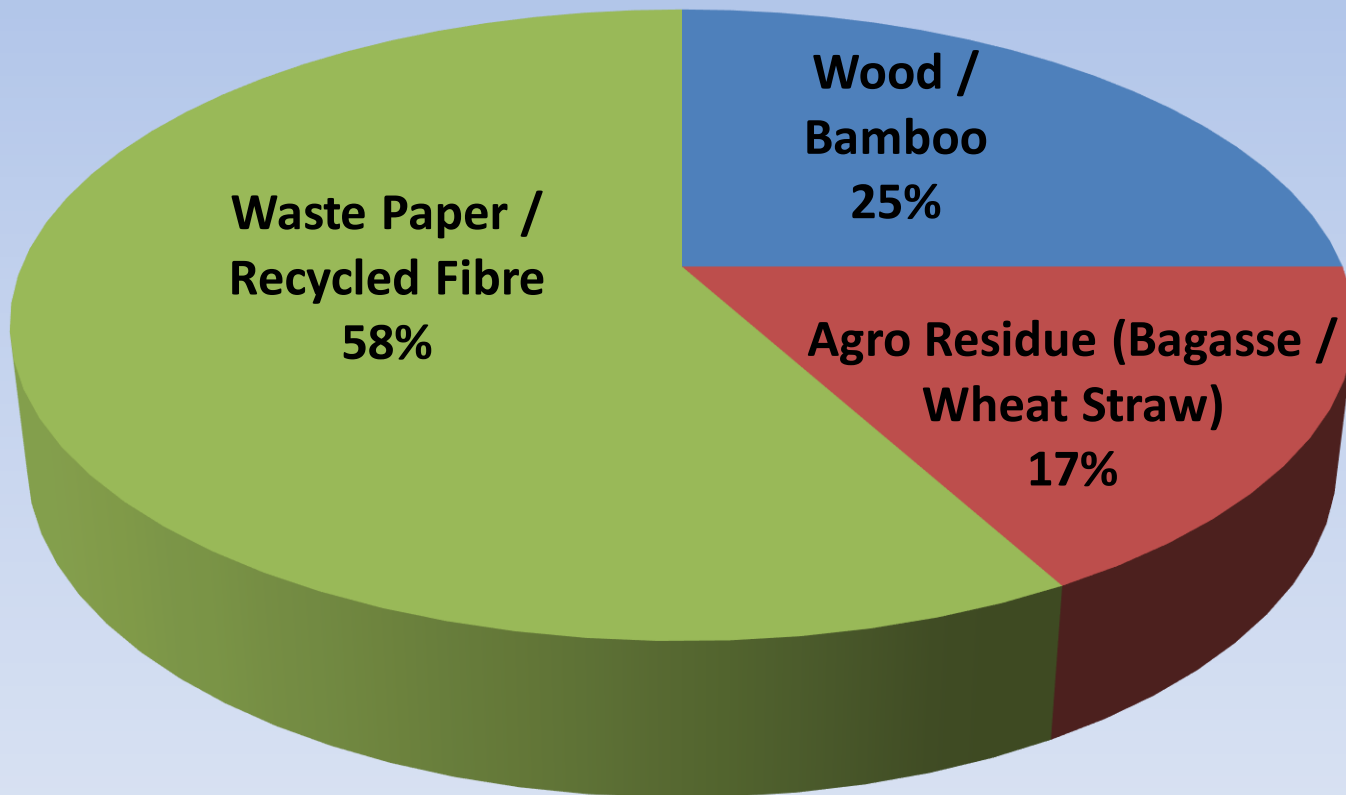
Raw Material Usage

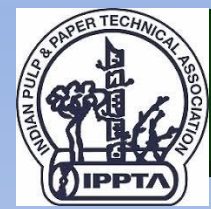
- Entire production from Renewable raw materials
- From Recovered Paper **58%**
- From Agro residues **17 %**
 - (Bagasse, Straw etc annual crops)
- From Plantation wood **25 %**
 - (**All man-made plantations & No forest produced**)





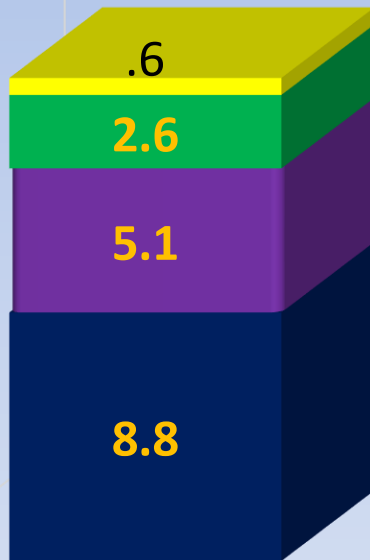
Production based on raw material



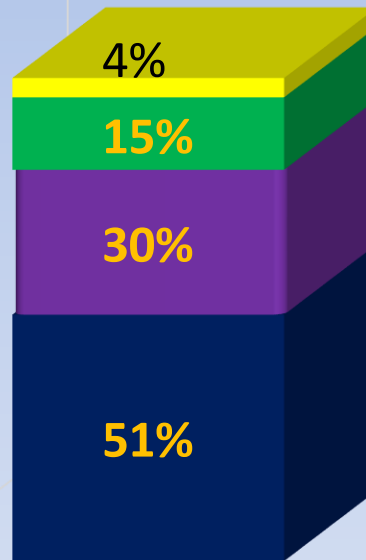


Raw material / Grade wise consumption

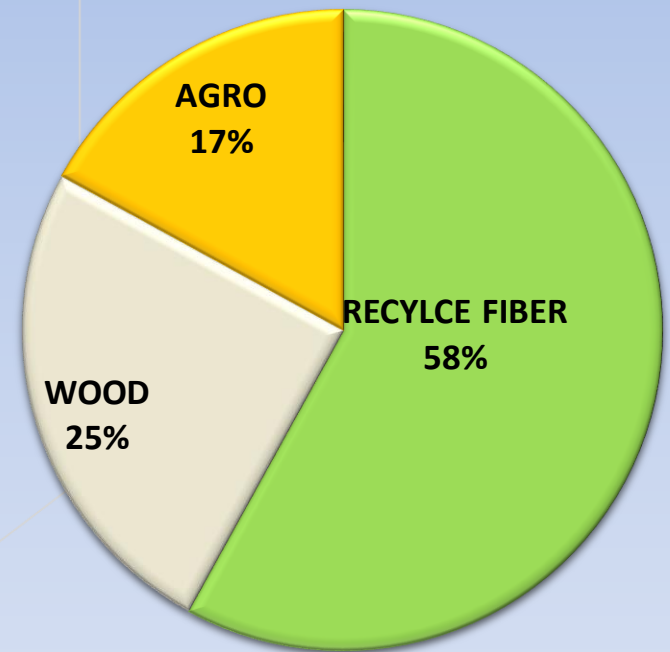
■ BOARD ■ WPP ■ NPT ■ SPL GRD



CONSUMPTION IN M.M.T.



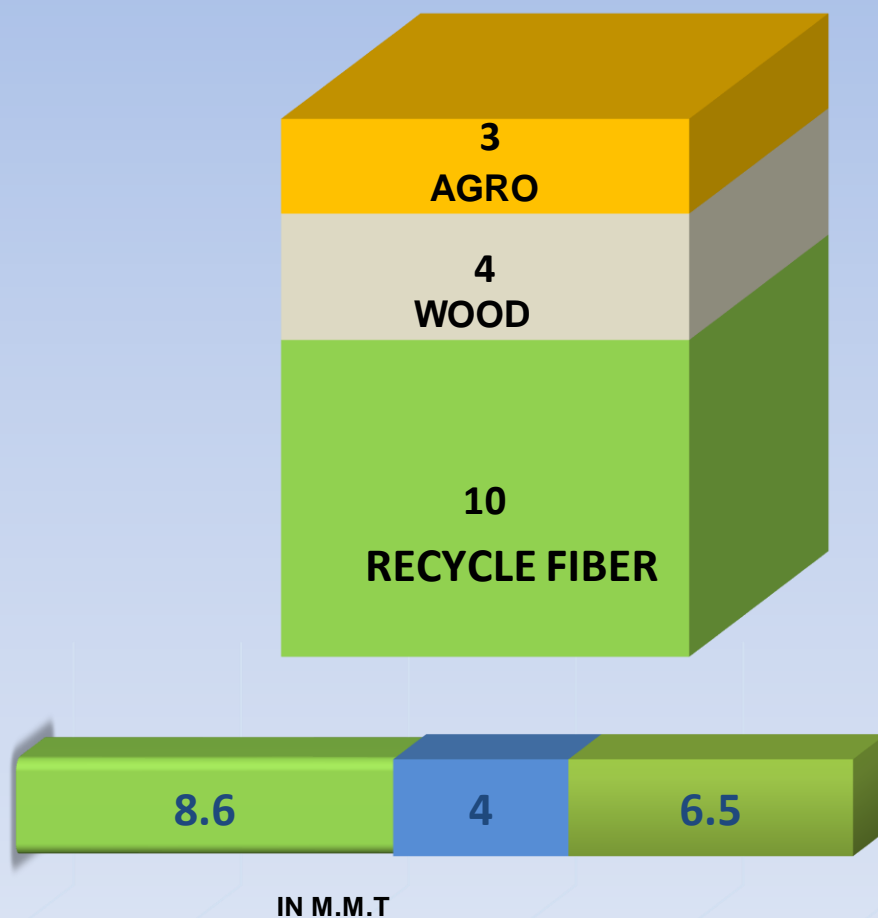
MARKET SHARE IN %



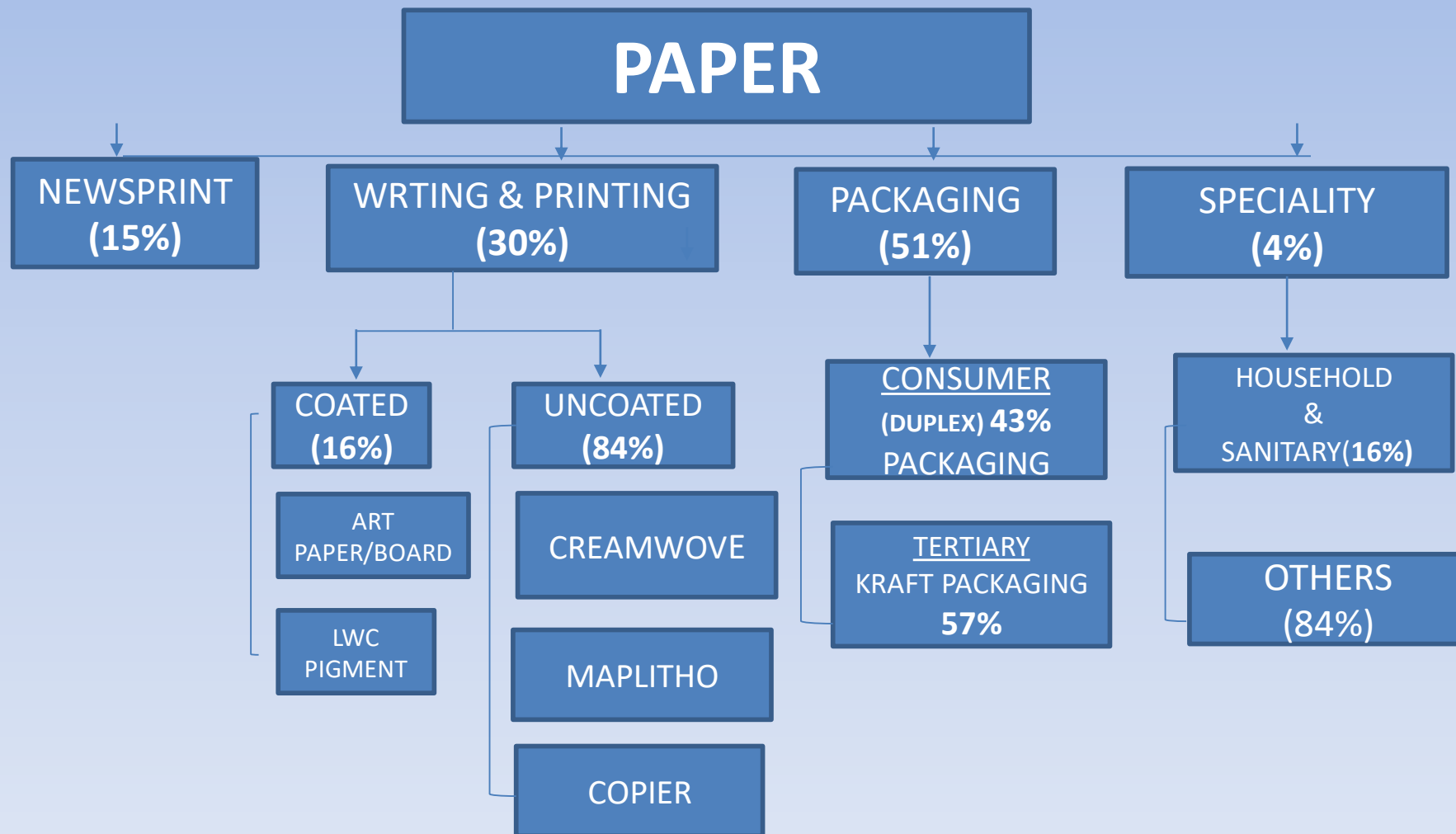
FIBER COMPOSITION IN %

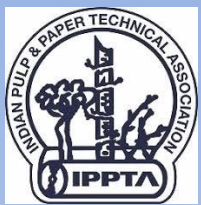
PER CAPITA CONSUMPTION
14KG

Raw Material Based Production in MT 17-18

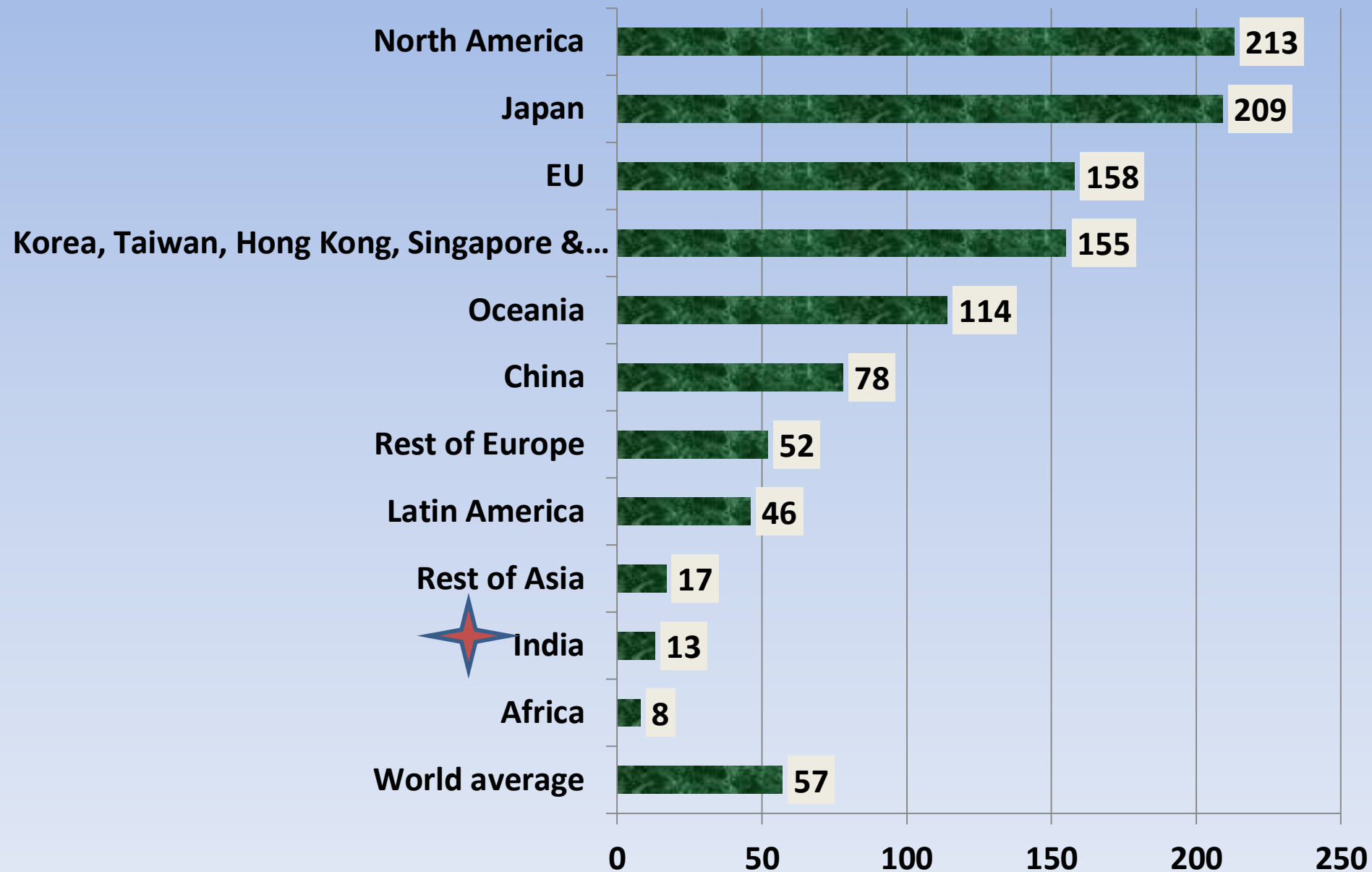


Paper Grades Produced in India



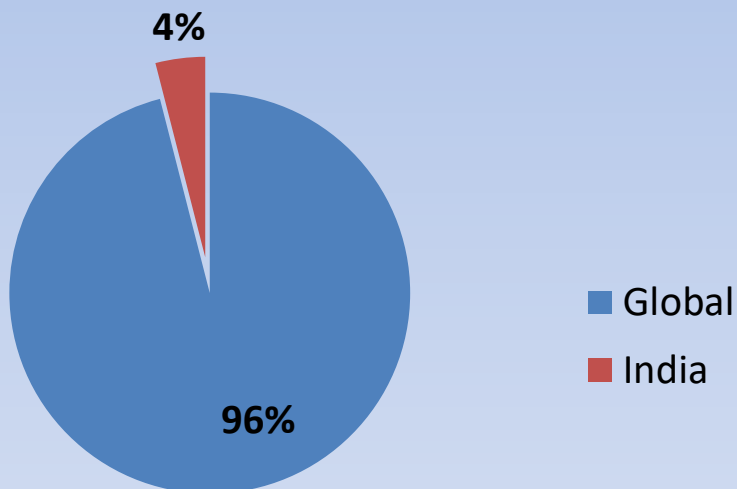


Paper per capita consumption (Kgs)

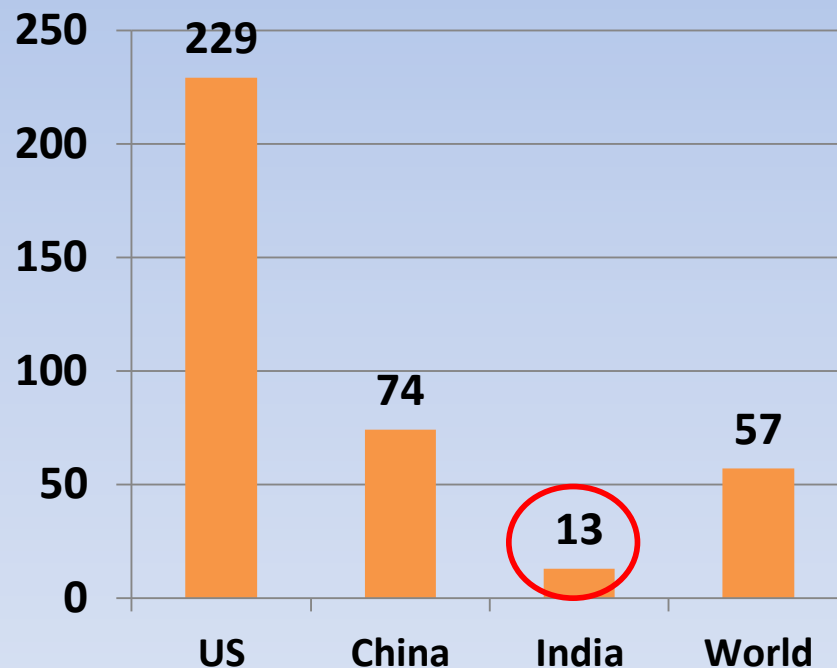


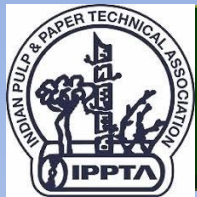
Indias Share in Global Market

India's Share on Global paper Market

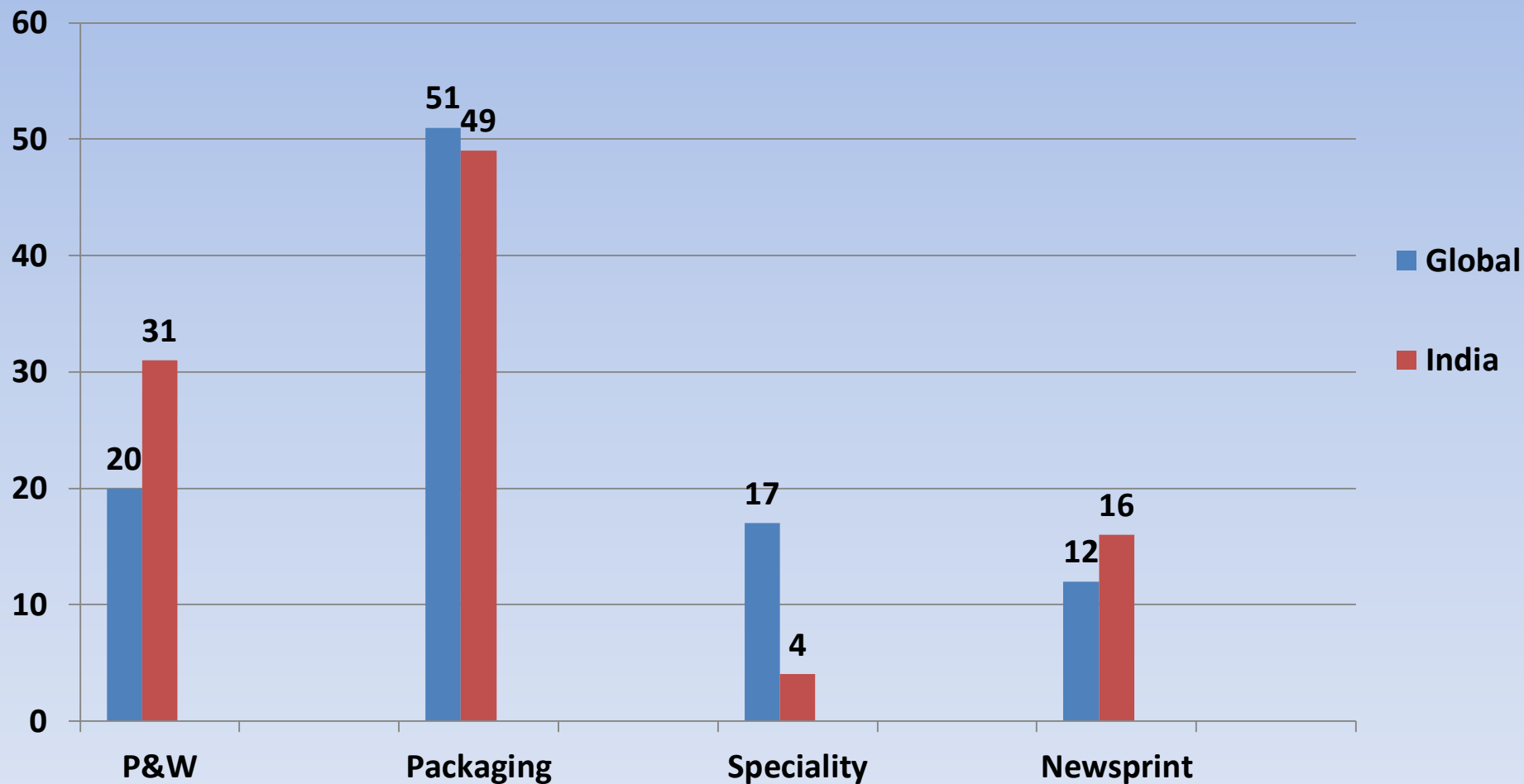


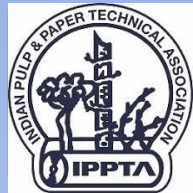
Per Capita Consumption of Paper in Kg



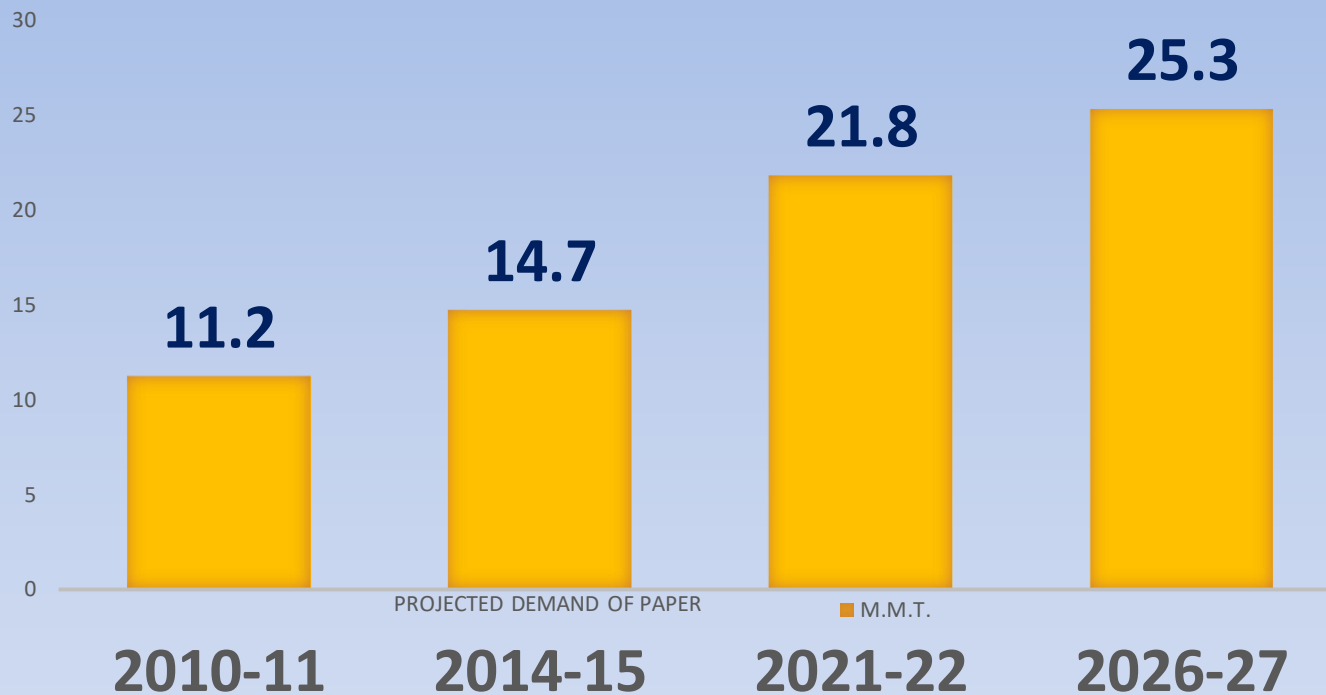


Segment wise Demand of Paper in %





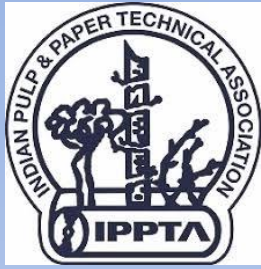
Projected Growth till 2027





Growth Driver

- **Population 1,358,265,281 October 15, 2018**
- **Equivalent to 17.74% of the total world population.**
- **land area is 29 million Km²**
- **33.2 % of the population is urban (449 million people in 2018)**
- **The median age in India is 27.0 years.**



Growth Driver

**STRONG ECONOMY
GROWTH**

**LOW
CONSUMPTION PER
CAPITA**

INDIAN PAPER INDUSTRY

**INCREASED
GOVT.FOCUS
ON EDUCATION**

**ROBUST PRINTING
INDUSTRY**



HS Code wise Export & Import

Exports & Imports of Paper, Paperboard & Newsprint (2017-18) in Thousand Tonnes

HS Code	Product Description	Exports	Imports
4801	Newsprint	7	1,448
4802	Uncoated Paper & Paperboard for Writing, Printing or Other Graphic Work	432	349
4803	Toilet or Facial Tissue Stock, Towel or Napkin Stock	32	10
4804	Uncoated Kraft Paper & Paperboard	117	226
4805	Other Uncoated Paper & Paperboard	103	134
4808	Paper & Paperboard, Corrugated, Creped, Crinkled, Embossed or Perforated	2	5
4810	Paper & Paperboard Coated on One / Both Sides	285	996
	Total	978	3,168

Source: DGCI&S

