

Image Rebuilding For Indian Paper Industry

Abstract: A trend has been set in motion in the social media, corporate and even governmental communications heaping allegations about the paper industry in the country as a destroyer of the forest wealth of the nation, consequent upon its use of wood etc. for paper making and also as a major polluter of the environment. Hence, citizens are being advised to avoid using paper as far as practicable, if they want to protect the forest wealth of the nation and want a cleaner environment.

But, a slightly deeper look under the surface, the facts and figures reveal a different picture and confirm the hollowness of such claims. In fact, the paper industry in India has not only desisted from using the woods from the designated forests, it has at the same time helped in preserving the forest wealth, reduced the overall garbage generated in the country, by enhancing recycling of waste material in its production and helped in spreading of education in the country.

Despite these achievements a distorted image is being presented to the country about the paper industry. It is, therefore, essential to bring the facts before the nation and also take necessary steps to lay down the path to building up the proper image for the paper industry in India, which it had once enjoyed.

The presentation made in the article, while laying bare the facts behind the achievements of the Indian paper industry, also indicates the steps required to be taken to re-establish its rightful image.



P. R. Ray
 Managing Director
 Ospark Cyfax Paper

Introduction

All discussions in the social and general media, about the paper industry in India, currently, is filled with adverse comments, primarily centring around how this industry is destroying the forest wealth of the nation by cutting down trees to make paper and hence people should avoid using more paper, to preserve the forest wealth of the nation, to protect the environment.

Not the media alone, similar sentiments are being expressed by leading banks of the country, public service providers, like power suppliers etc, as also the Government exhorting the citizens to reduce the use of paper in order to preserve the environment.

Undoubtedly, such observations, including from those in responsible positions, have a telling effect

on the Image of the paper industry as a whole, finally creating an unfavourable vibe and impacting the market adversely.

It, therefore, becomes essential to counter such disinformation, with correct inputs and 'Re' Establish the Image of the Paper Industry in India.

The Fact

These unfounded allegations need to be countered and facts need to be brought to light for projecting the correct Image and there could be no better beginning than to start with :

Raw Material Usage

Contentions

Table - 1 below establishes very explicitly that :

Table - 1: Raw Material Usage (Production Basis – Million Tons)

Raw Material	2000		2010		2015		2018		2025 (P)	
	Quantity	%	Quantity	%	Quantity	%	Quantity	%	Quantity	%
Wood	1.91	39	3.03	33	4.92	33	3.94	25	5.17	25
Waste Paper	1.47	30	4.13	45	6.98	47	9.15	58	12.41	60
Agro	1.51	31	2.02	22	3.66	20	2.67	17	3.11	15
Total	4.89	100	9.18	100	14.96	100	15.76	100	20.69	100

Meanwhile overall forest coverage in India has grown in Table- 2

Year	Forest Coverage ('000 Sqr Km)	% Growth	%age of Total Landmass
2010	692.03		21.05
2015	701.67	+1.39	21.34
2019	712.25	+1.50	21.67

- In overall production, use of wood has declined from 39% in 2000 to 25% in 2018 in absolute terms contrary to the allegation being floated about the destruction of forest by the paper industry.
- Use of Waste Paper has increased to 58% presently, from 30% in 2000, nearly double in 18 years further reducing the dependence on wood to make paper, confirming the falsehood of the allegations.
- All these have happened despite paper production in the country increasing drastically by 322% in last twenty years.

Wood Usage

- No wood procured from designated forest

- 90% of wood is sourced from social / farm forestry.
- Paper Industry led forestry helping use of barren lands and generating additional incomes for farmers, specially for those who are marginal.

Contribution from the Paper Industry of not using wood from designated forest, must have also contributed to this growth, though difficult to quantify.

Waste Paper Usage

- In last 18 years waste paper usage has increased from 31% to 58% of overall paper production.
- In volume terms the increase is from 1.47 million tonnes to 9.15 million tonnes of paper per annum, are now being produced from Waste Paper, an increase of 622%, only in the space of eighteen years.
- This increase has led to saving of 165 million trees a year, according to an estimate, in absolute terms
- This use of Waste Paper in paper making has also contributed towards oil, power, water and landfill savings.
- **This usage of Waste Paper, in paper making is proudly Comparable to any international standard :**

Place	% Waste Paper Usage
US	61.7
UK	99
EURO	71.6
INDIA	58

- This rate of Waste Paper Usage has helped reduce garbage for landfill and incineration by about 4.8% annually, out of 62 million tonnes Solid Waste generated in the urban areas of the country.

Agro Residue Usage

- Though reducing, helps in brining down wood usage further.

Paper Vs Plastic

Plastic consumption in India:-

Year	Consumption Million Tns
2000	0.3
2010	0.8
2015	13.4
2020(P)	22.0

- 24% i.e. 5.28 million tons of this total consumption is expected to be used in Packaging , by 2020.

- 79% plastic goes for landfill and will need 400 years to decompose, creating enormous environmental hazard .
- Increased use of paper by just a tonne in packaging will help reduce the hazardous landfill by 4 meters.
- Thus paper being more versatile, sustainable, and recyclable and environment friendly should be better suited as a plastic substitute.

Historical Fact Sheet

An ideal image for the paper industry in India is nothing new:

- Till around 1970s the paper industry in India carried a lofty Image.
- One recalls the image that mills like Titaghur Paper etc. conveyed about the paper industry as a reliable supplier of a strategic product like paper for all governmental documents including post card, inland letter, stamp paper, passport paper etc., possibly conjuring an image of national service in a recently independent country.
- Similar image of the paper industry as an aide to education got conveyed, when children were using exercise books made with paper from these mills.
- The image of 'Sunlit Bond' always conveyed the image of a classy writing material irrespective of the individual mill that supplied this paper.
- Somehow, these early images got diluted in the course of achieving individual corporate goals.
- Therefore in view of current onslaught on the India paper industry, from vested quarters, Revival of the lost image for the paper industry and 'Re Establishing' that in the minds of the target public has become imperative for the interest of the welfare of this industry.

What is An Image

The image that we are talking about is not a visual or a picture, or a reflection and not a medical reporting either. It is:

- A mental picture or an impression creating a conception and held in common by the members of a group or a target public.
- This picture or impression remains in the realm of perception.

- In this instance the perception or an idea people have in general about the paper industry in India and how it relates and communicates with its target public.
- A good imagery perception amongst the target public will generate goodwill and create good market vibes. A negative one at that leads to opposite, creating difficulties in its dealings, including with the Government, the users and the target public at large and giving credence to hearsay and false messages, as are being carried now.

Essentials for Image Rebuilding

What does the paper industry in India need to do to Rebuild the Image:

Identify the core values for the industry:

- Service to the nation in meeting with the requirements of a very strategic material.
- Do that in a sustainable and responsible manner without causing harm to the nation's environment for the benefit of the future generation.

Lay down key goals to realize the core values:-

- Cater to country's present all round paper requirements, reliably.
- Produce best quality paper in cost effective manner.
- Increased sourcing of raw material in sustainable manner, through social/ farm forestry.
- Increased use of recycled fibre in paper making
- Promote innovation towards plastic replacement in packaging.
- Contribute towards growth of primary education in the country.

Highlight the Strength :

- Widest spread in the country.
- Industry with solid knowledge base and robust technical capability to achieve key goals.
- Qualified manpower to run the industry successfully.
- Spirit of innovation within the industry.
- Adequate capacity to meet country's paper requirement.

Manage the Weakness

Intra industry bottlenecks are not the subject matter of discussion here. Rather those related to target public, essential for Image make up, are:

- Build up reliability by pursuing long term objectives and sacrificing short term windfalls.
- Stop leaving market in the lurch.
- Acknowledge crisis situation and stand up at it by being transparent.
- Build up long term relationship with users and the target public.
- Build up system for uninterrupted system of dialogue, to and from with the target public.

Role of the Indian Paper Industry in National Life.

Despite the set backs the paper industry in India has suffered over the years and the brickbats being thrown at it, presently, this Industry in India is second to none in contributing to the nation's welfare and the future growth.

Let us proudly declare our role as: -

Wealth Builder to the Nation

- Generate INR 60,000 Crore revenue
- Contribute INR 4,500 Crore to the nation's exchequer
- Capable of generating foreign exchange savings for the country, through import substitution.

Wealth Preserver to the Nation

- Help preserve forest wealth of the nation by not using wood from designated forest.
- By using 90% wood from social / farm forestry for the paper that it makes.
- By brining 125000 hectares of land, annually to social / farm forestry.
- By Promoting optimal use of barren or unusable land for forestry.

Employment Provider to the Nation

- Employing 0.5 million people in the industry, directly.
- By providing indirect employment to 1.5 million in the industry.
- By generating livelihood of 72 million man days annually in the agro / social forestry.

Garbage Handler to the Nation

- Helping in reducing garbage by 4.8%, of overall solid waste generation in urban areas of the country and using same for production of fresh paper.
- By encouraging higher recovery of paper wastes from solid wastes.

Environment Protector of the Nation

- Innovating constantly to replace harmful plastics.
- While promoting making of shopping bags, food and pharma packs, drinking straw etc, by paper
- Helping reduce hazardous e-waste.

Educator to the Nation

- By 2025, country's primary schools will cater to 24.4 million children requiring nearly 2.50 million Tons of paper – the paper industry in the country will cater to this requirement. A major feather in the cap for this industry in promoting the cause of education Table - 3.

These are an envious multifaceted role for the paper industry in India, which very few can match. Only, they need to be projected in the right manner and on a sustained basis for building up the right Image for this industry.

Some Recent Efforts

Some recent efforts have been made in last one year to build up that Image, through:-

- Social Media Postings conveying many of these messages.
- Paper Day Celebrations spread all over the country in unison.
- CPTA promotional film on the occasion of its centenary.
- By bringing out the 100 years celebration volume of the history of CPTA.

But, these were just a drops in vast ocean. The scale needs to be far larger and the communication needs to be sustained, to produce a meaningful impact and counter the adverse baseless propaganda that this industry now faces.

Conclusion

Let us all be proud of our own might as one of the oldest industry in the country and confidently project our Image as a responsible contributor to the health and wealth of this nation, we call India.

Table - 3: Educator to the Nation

Year	Per Capital use of paper		Students in School Millions	Total WPP Usage in Schools Million Tons
	All Varieties	WPP		
	KG	KG		
2000	9.49	3.28	102.97	0.34
2010	9.80	3.73	169.94	0.63
2015	12.10	3.80	221.06	0.84
2020(P)	15.30	5.07	317.90	1.61