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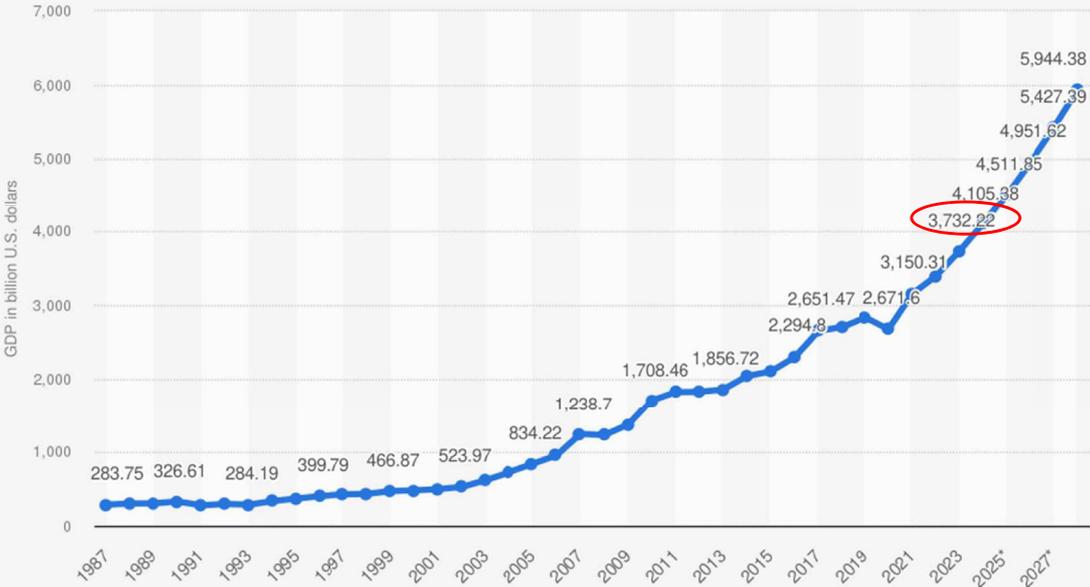
Indian Paper Industry *a journey well-travelled*

By

'M.K.Goyal'
Honorary Secretary General
Indian Pulp & Paper Technical Association
Production Data collected from secondary sources



India: Gross domestic product (GDP) in current prices from 1987 to 2028 (in billion U.S. dollars)



Source
IMF
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Additional Information:
India; IMF



Growth Driver

- **Population 1.43 billion as of 2023.**
- **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 Paper
Consumption Per
Capita**

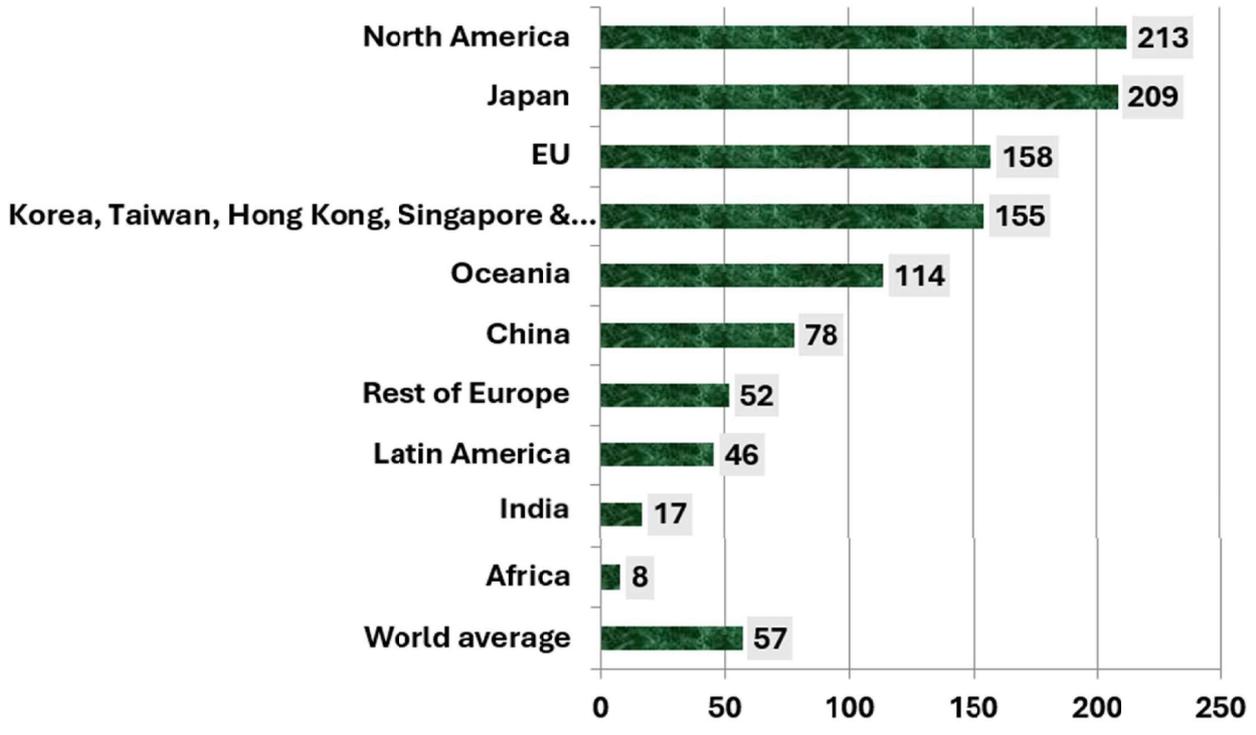
**Increased
Government Focus
on Education**

**Robust Printing
Industry**

**INDIAN PAPER
INDUSTRY**



Paper per capita consumption (Kgs)



Leading Paper and Pulp Manufacturers Countries in The World

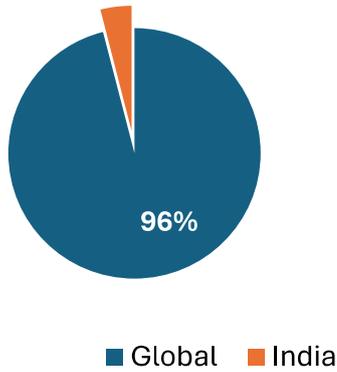
Country Rank	Production (MT)
China	99.30
US	75.08
Japan	26.63
India	26.51
Germany	22.70
Canada	12.11
Finland	11.39
Brazil	10.16
South Korea	11.49

Source: Google

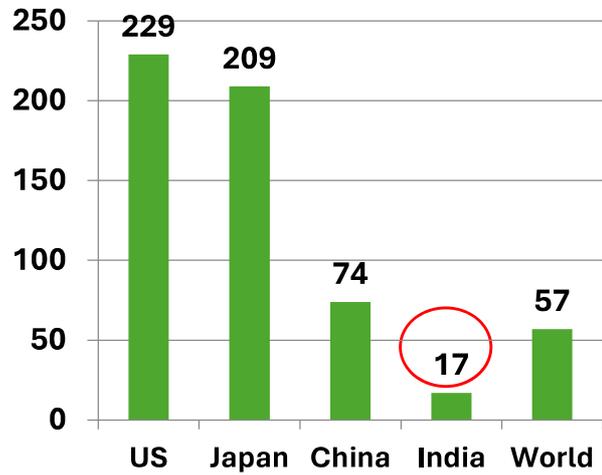


India's Share in Global Market

India's Share on Global paper Market



Per Capita Consumption of Paper in Kg



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Indian Paper Industry

- Overall - **569 Running Paper Mills**
- Production - **26.51 Million tonnes per annum**
- Consumption - **26.55 Million tonnes per annum**

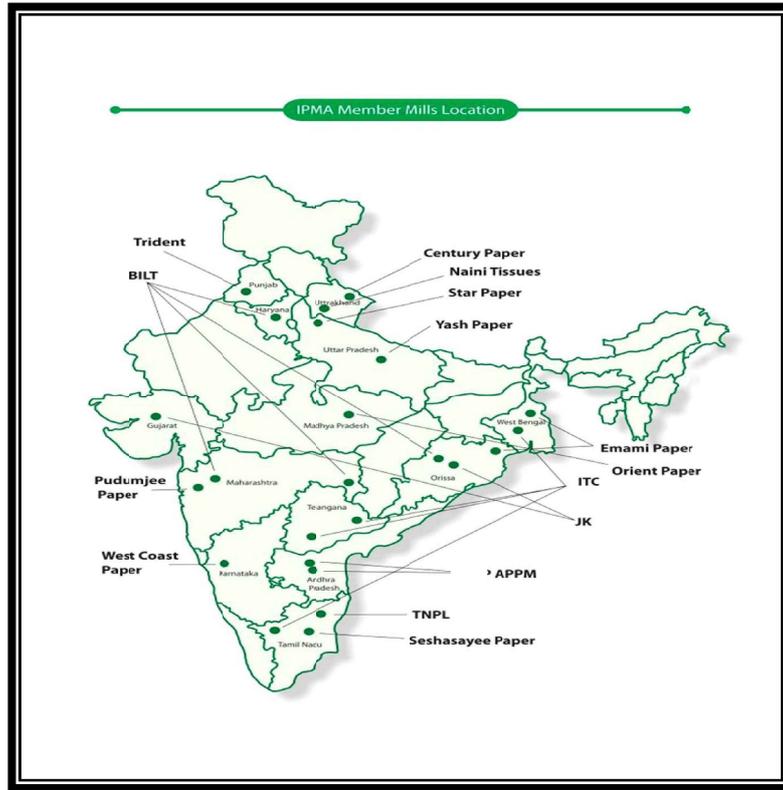


Production 22	26.51
Import	2.51
Export	-2.47
Consumption 22	26.55

Period Apr 2022 to March 2023



Major Pulp and Paper Mills in India



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Growth of Indian Paper Mills in Nos 1951-2023





State Wise Distribution of Paper Mills in India

Company Name	Running Mills
Assam	5
AP & Telangna	49
Bihar	6
Chhatisgarh	16
Haryana	7
Himachal Pradesh	4
Jammu & Kashmir	1
Kerala	6
Madhya Pradesh	6
Orissa	5
Puducherry	5
Punjab	31
Uttrakhand	29
Gujarat	143
Karnataka	21
Maharastra	40
Tamil Nadu	76
Uttar Pradesh	93
West Bengal	26
TOTAL	569



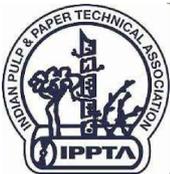
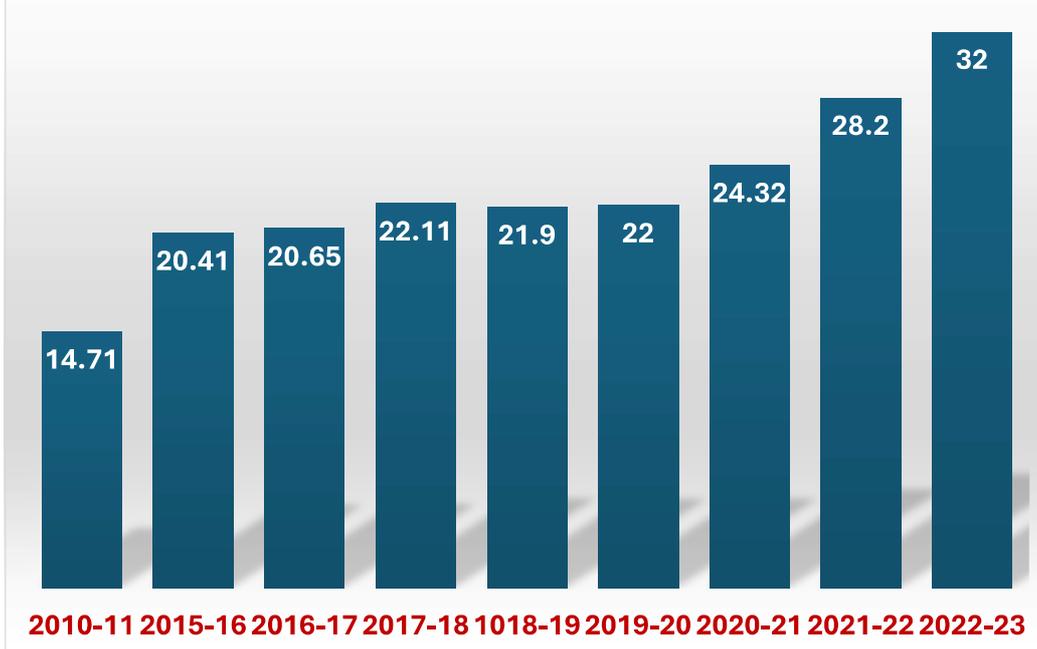
Big Units

FY 2022-23 PERFORMANCE SUMMARY		
Mill Name	Production Capacity	Actual Production
	(MTPA)	(MT)
ITC Limited – PSPD*	9,80,000	
JK Paper Limited	7,61,000	8,72,226
Tamil Nadu Newsprint & Paper Limited	6,00,000	5,88,828
Century Pulp & Paper	4,81,130	4,55,225
West Coast Paper Mills Limited**	3,20,000	3,14,919
Andhra Paper Limited	2,41,000	2,50,292
Seshasayee Paper & Boards Limited	2,55,000	2,41,145
Emami Paper Mills Limited	3,40,000	2,96,594
Satia Industries Limited	2,19,000	2,09,910
Kuantum Papers Limited	1,64,250	1,52,304
Bindals Paper Mills Limited & Bindals Group***	4,70,600	3,97,459
Trident Limited (Paper & Chemicals Division)		1,48,145
N R Agarwal Industries Limited	2,88,000	2,70,941
Naini Papers Limited	1,25,000	1,26,415
Orient Paper & Industries Limited	1,00,000	79,933
Silverton Pulp & Papers Private Limited	1,80,000	1,39,858
Shreyans Industries Limited	94,000	92,996
Ruchira Papers Limited		1,46,758
Pudumjee Paper Products Limited	72,000	57,600
Star Paper Mills Limited	75,000	67,000
Dev Priya Products Private Limited	1,66,000	1,46,303
Genus Paper & Boards Limited	4,50,000	
Pakka Limited	39,100	39,768
Dev Priya Industries Limited	2,00,000	1,46,030

* The financial numbers are for Paper, Paperboard and Packaging Segment
 ** Paper & Paperboard Division Turnover
 *** Bindals Group has given the data of the group companies (Bindals Papers Mills Limited, Tehri Pulp And Paper Limited, Agarwal Duplex Board Mills Limited, Bindlas Duplex) as a whole and not of an individual company.



Growth in Capacity of Paper Production (Million tons)



Salient features of Indian Paper Mills



Industry manufactures all grades of paper.



Backward linkages with the farming community with strong Agro forestry roots.



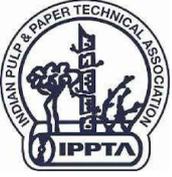
Compliant with Government's Environment Charter.



Annual turnover of over USD 9 billion.



Industry provides direct employment to 0.5 million persons, and indirectly to 1.5 million.

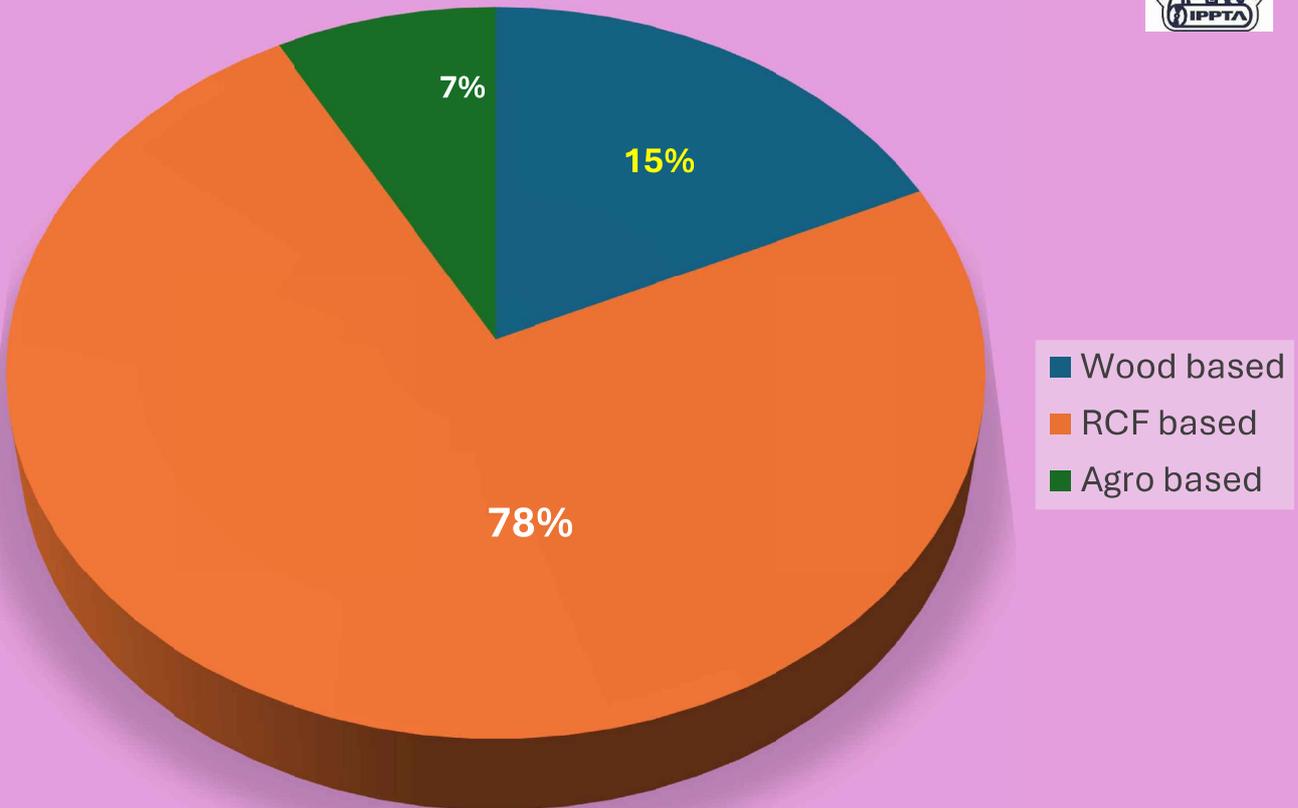


Raw Material Usage

- Entire production from Renewable raw materials
- From Recovered Paper **78%**
- From Agro residues **7 %**
(Bagasse, Straw etc annual crops)
- From Plantation wood **15 %**
(All man-made plantations & No forest produced)

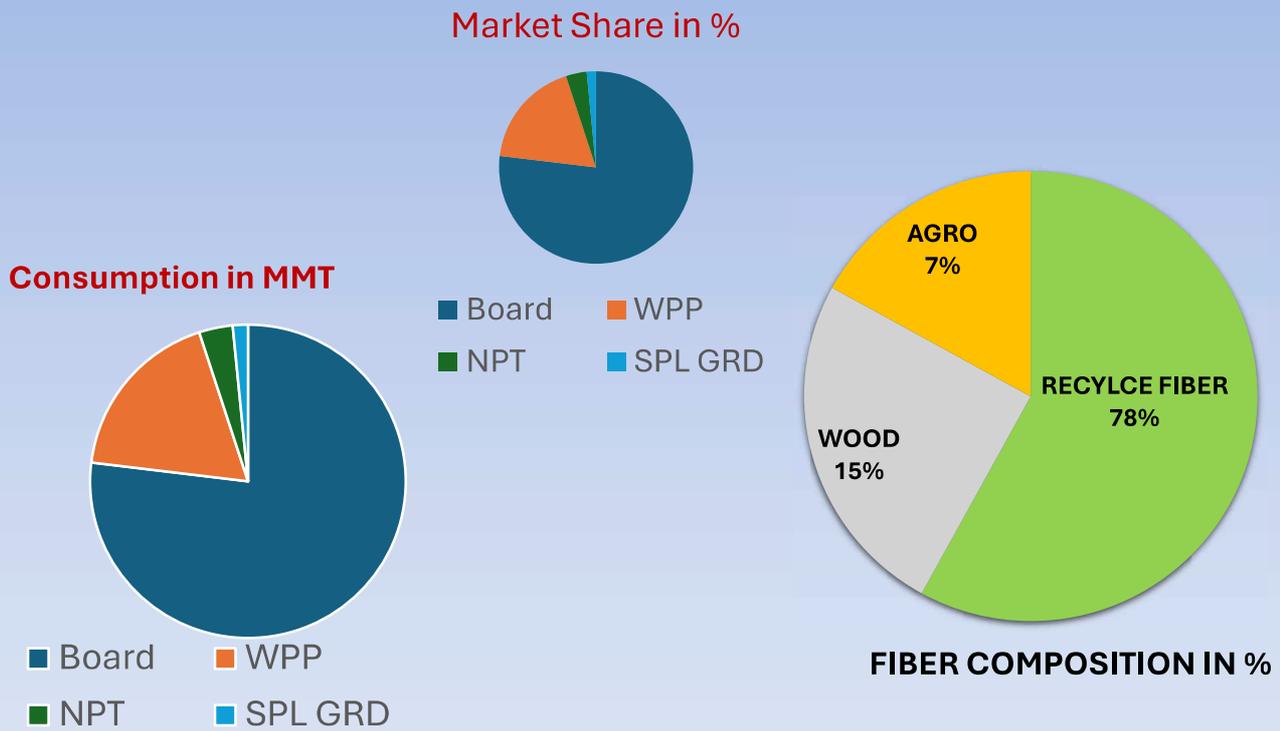


Share of Raw Material for Paper Making (%)





Raw material / Grade wise consumption

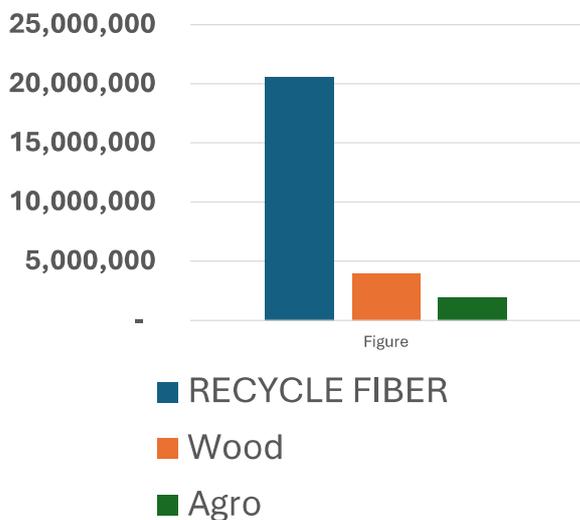


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Raw material-based Production in MT (2022)

Raw material-based Production in MT (2022)



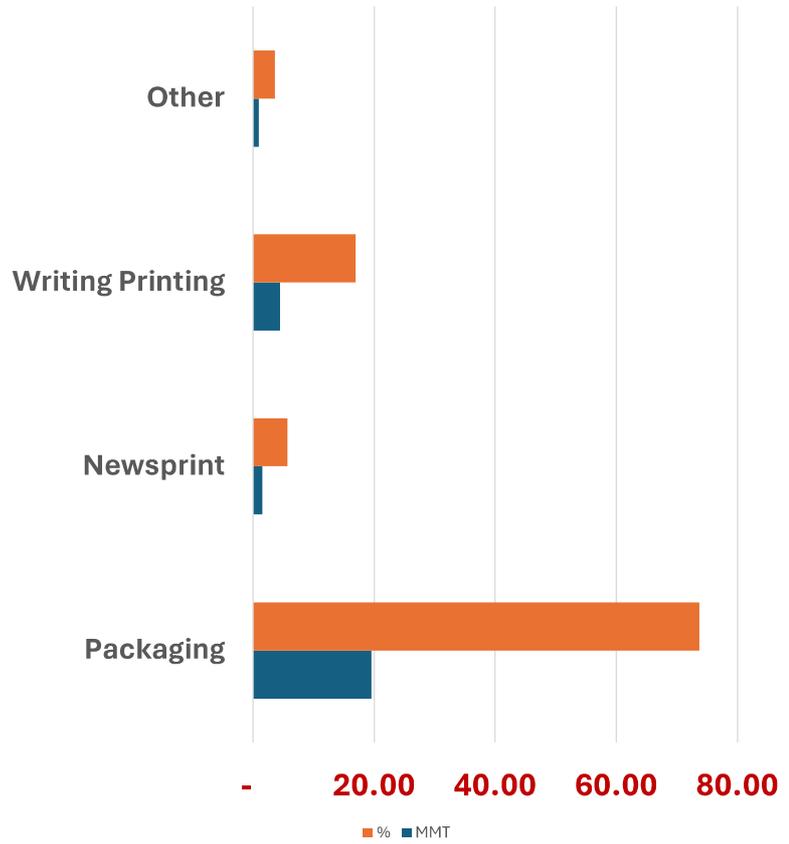
Waste Paper Recovery in MMT (2022)

Particulars	Figure
Production	20.6
Fiber Imports	8
Domestic Recovery	12.6

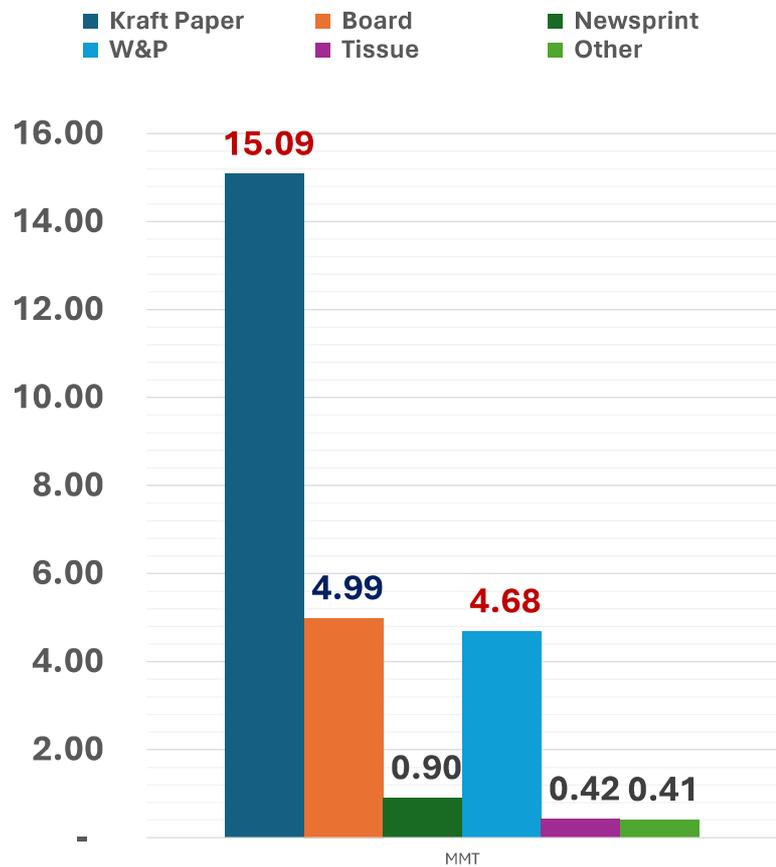
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Segment wise paper Consumption in MMT & % (2022)

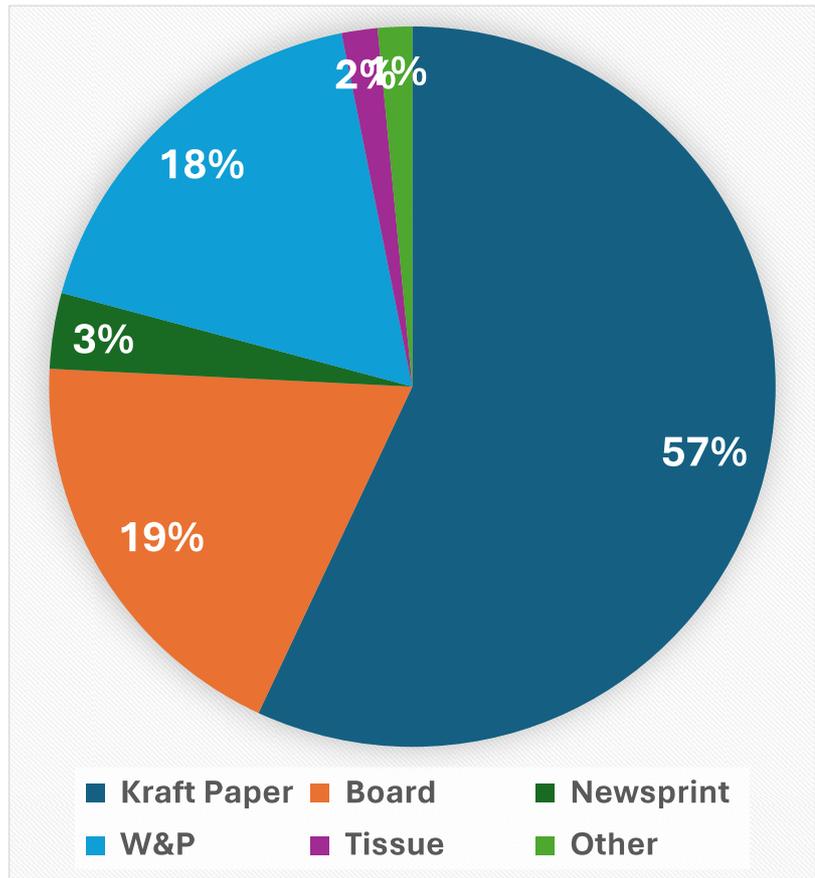


Grade wise Domestic Production in MMT (2022)

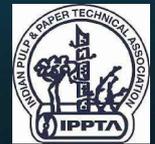




Grade wise Domestic Production in % (2022)



Net Domestic Consumption of Paper in MMT (2022)

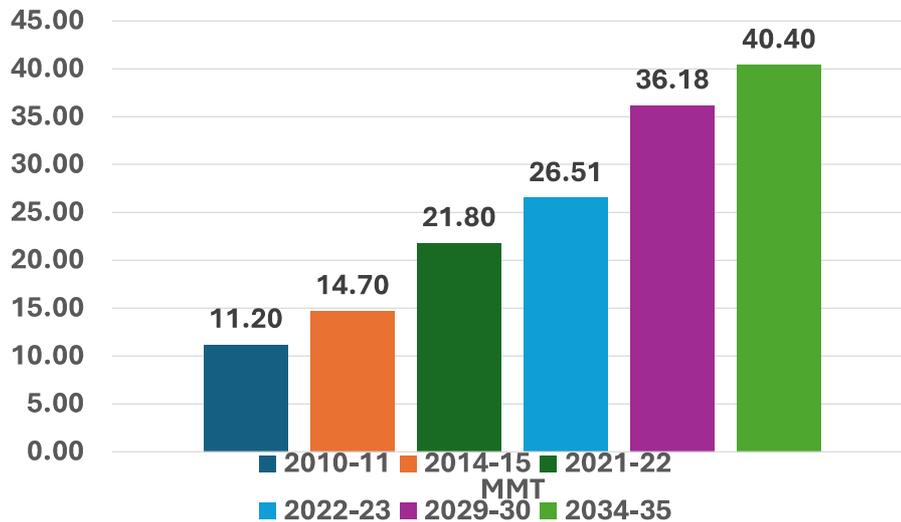


Particulars	MMT	Add Import	Less Export	Net Domestic Consumption
Kraft Paper	15.09	0.35	0.60	14.84
Board	4.99	0.28	0.56	4.71
Newsprint	0.90	0.62	0.01	1.52
W&P	4.68	0.26	0.44	4.50
Tissue	0.42	0.37	0.10	0.69
Other	0.41	0.62	0.76	0.27
Total	26.49	2.51	2.47	26.53



Projected Growth till 2035

PROJECTED DEMAND OF PAPER



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Invitation from IPPTA

- Visit us any time .
- Come and see us at Paperex in Dec 25 – world's biggest paper show.
- Let us join hands to take our co-operation to new height.





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