

India Paper Industry Outlook to FY'2018 - Steered by Industrialization and Literacy Levels

<https://marketpublishers.com/r/I857A2531D5EN.html>

Date: January 2014

Pages: 83

Price: US\$ 800.00 (Single User License)

ID: I857A2531D5EN

Abstracts

The industry research publication titled 'India Paper Industry Outlook to FY'2018 – Steered by Industrialization and Literacy Levels' presents a comprehensive analysis of market size by value and volume of paper and its different types in India. The report entails the market share analysis and company profiles of major players in the Indian paper industry. The future analysis, trends and developments, growth drivers, issues and challenges, and segmentation by type of paper, raw material consumption pattern and organizational structure of the industry have also been discussed in the industry research report.

Paper Industry plays a vital role in the economic growth of a country through revenue generation, foreign exchange earnings, and employment generation. Paper finds its usage in recording, storage and dissemination of information. In addition to these, paper is a widely used medium for wrapping and packaging of several products. Despite the technological revolution leading to increased computerization of operations, paper still holds on to its existence and has become an essential commodity.

India's paper industry is the 15th largest paper industry in the world. It provides employment to nearly 0.37 million people directly and 1.3 million people indirectly, and contributed almost INR 40,000 million to the exchequer in FY'2013. The overall paper production in India in FY'2007 was ~ million tonnes and reached ~ million tonnes in FY'2013 at a CAGR of 8.6% during FY'2007-FY'2013. With several major players witnessing capacity addition, the installed capacity of the paper industry in India increased at a CAGR of 7.5% from ~ million tons in FY'2007 to ~ million tons in FY'2013. Such significant capacity expansion is leading to increased production of paper in the country. The consumption of paper in India is closely linked to the GDP of the country, such that consumption increases with GDP growth, and vice versa. The

total consumption of paper in FY'2013 was ~ million tons which has grown from ~ million tons in FY'2007, observing a CAGR of 6.9 % during FY'2007-FY'2013.

The paper industry in India can be broadly classified into 4 categories namely, paperboard and industrial packaging papers, writing and printing papers, newsprint, and specialty papers. While paperboards and industrial packaging papers accounted for the highest consumption volume of ~ million tons in FY'2013, specialty paper is the fastest growing segment in the Indian paper industry and is estimated to register a CAGR of 11.3% from ~ million tons in FY'2007, to ~ million tons in FY'2013.

Although India is almost self-sufficient in the manufacture of most varieties of paper, import of paper is confined to newsprint, and certain grades of specialty paper. An estimated ~ million tons of glazed newsprint was imported by India in FY'2013. Furthermore, the industry is also reliant on import of raw materials such as wood pulp and waste paper which are required for the production of paper.

The main players dominating the Indian paper industry include Ballarpur Industries Ltd., ITC Ltd., Tamil Nadu Newsprint and Papers Ltd., JK. Papers Ltd., West Coast Paper Mills Ltd. and International Paper APPM Ltd. In addition to these companies, many other players in the industry are making constant efforts towards sourcing their wood requirement from their respective farm forestry initiatives. Having realized the advantages of farm forestry by all the stakeholders involved in the initiative, it is being predominantly followed by many paper manufacturers in India.

The overall consumption of paper in India is expected to reach ~ million tons by FY'2017 from ~ million tons in FY'2013, growing at a CAGR of 6.3% during FY'2013-FY'2018. The Indian paper industry is projected to grow tremendously on account of increasing literacy levels, higher government spending on education, booming retail sector, increasing industrial activities, growth in print media, packaging of FMCGs, pharmaceuticals and apparels, and changing urban lifestyles.

KEY TOPICS COVERED IN THE REPORT

The market size of India paper industry in terms of production, consumption and turnover

The market segmentation of the paper industry in India by production and consumption of types of paper and raw material consumption pattern

India paperboard and industrial packaging paper market size and segmentation by kraft paper, duplex board, poster paper, and virgin board

India writing and printing paper market size and segmentation by coated and uncoated paper, comprising creamwove paper, maplitho paper, and branded copier paper

India newsprint market size, market shares of major players and the competitive landscape in the newsprint market in India

India specialty paper market size and competitive scenario of major players in the specialty paper market in India

Pricing trends of raw materials and types of paper in India paper industry

Trends and developments in India paper industry

Government regulations in the Indian paper industry

Growth drivers and challenges in the paper industry in India

Market share of major players in India paper industry by production and turnover

Company profiles of the leading companies in India paper industry

Future outlook and projections of India paper industry

Contents

1. INDIA PAPER INDUSTRY INTRODUCTION

2. VALUE CHAIN OF INDIA PAPER INDUSTRY

3. INDIA PAPER INDUSTRY MARKET SIZE

3.1. By Production Volume, FY'2007-FY'2013

3.2. By Gross Consumption Volume and Per Capita Consumption Volume, FY'2007-FY'2013

3.3. By Turnover of India Paper Industry, FY'2007-FY'2013

4. INDIA PAPER INDUSTRY INSTALLED CAPACITY AND CAPACITY UTILIZATION, FY'2007-FY'2013

5. INDIA PAPER MARKET SEGMENTATION

5.1. By Types of Paper (Production and Consumption Volume), FY'2007-FY'2013

5.2. By Types of Paper (Revenue), FY'2007-FY'2013

5.3. By Raw Material Consumption, FY'2013

6. INDIA PAPERBOARD & INDUSTRIAL PACKAGING PAPER MARKET

6.1. Introduction and Market Size, FY'2007-FY'2013

6.2. India Paperboard & Industrial Packaging Paper Market Segmentation

7. INDIA WRITING AND PRINTING PAPER MARKET

7.1. Introduction and Market Size, FY'2007-FY'2013

7.2. India Writing and Printing Paper Market Segmentation

8. INDIA NEWSPRINT MARKET

8.1. Introduction and Market Size, FY'2007-FY'2013

8.2. Market Share of Major Players in India Newsprint Market

8.3. Competitive Scenario of Major Players in India Newsprint Market

9. INDIA SPECIALTY PAPER MARKET

9.1. Introduction and Market Size, FY'2007-FY'2013

9.2. Competitive Scenario of Major Players in India Specialty Paper Market

10. INDIA PAPER INDUSTRY IMPORT AND EXPORT SCENARIO

11. PAPER MILLS SCENARIO IN INDIA

12. PRICING TRENDS IN INDIA PAPER INDUSTRY

12.1. Raw Material Prices

12.1.1. Wood Price, March' 2012 and March' 2013

12.1.2. Recycled Paper Price, March'2012 and March' 2013

12.2. Price of Types of Papers

13. COST STRUCTURE FOR A PAPER MANUFACTURER IN INDIA

14. TRENDS AND DEVELOPMENTS IN INDIA PAPER INDUSTRY

Shift to Non-Conventional Raw Material

Extending Credit Profiles of Paper Manufacturers

Increasing Investments Towards Agro-forestry

Impact of High Input Costs on Profitability

Capacity Additions Leading to Increased Competition

15. GOVERNMENT SUPPORT AND REGULATIONS IN INDIA PAPER INDUSTRY

Custom Duty and Central Excise Duty

Central Pulp and Paper Research Institute (CPPRI)

Environmental Standards

16. GROWTH DRIVERS OF INDIA PAPER INDUSTRY

Improving Literacy Levels

Increased Demand for Packaging

Growth in the Printing and Publishing Industry

Increase in Advertising Through Print Media

Growing Affluence and Lifestyle Changes

17. ISSUES AND CHALLENGES OF INDIA PAPER INDUSTRY

Reliance on Imported Raw Material
Underutilization of Paper Mills
Environmental Issues
High Cost of Energy and Raw Materials
Highly Fragmented Industry
Cheap Imports from China and Indonesia

18. SWOT ANALYSIS OF INDIA PAPER INDUSTRY

19. PORTER'S FIVE FORCES ANALYSIS OF INDIA PAPER INDUSTRY

Bargaining Power of Suppliers
Bargaining Power of Buyers
Threat of Substitute Products
Rivalry Among Existing Competitors
Threat of New Entrants

20. MARKET SHARE OF MAJOR PLAYERS IN INDIA PAPER INDUSTRY, FY'2013

20.1. By Production Volume, FY'2013
20.2. By Revenue, FY'2013

21. COMPANY PROFILE OF MAJOR PLAYERS IN INDIA PAPER INDUSTRY

21.1. Ballarpur Industries Limited
21.1.1. Company Overview
21.1.2. Business Strategies
21.1.3. Production and Sales Volume, FY'2010-FY'2013
21.1.4. Financial Performance, FY'2010-FY'2013
21.1.5. Farm Forestry Initiatives
21.2. ITC Limited
21.2.1. Company Overview
21.2.2. Business Strategies
21.2.3. Production Volume, FY'2010-FY'2013
21.2.4. Financial Performance, FY'2010-FY'2013
21.2.5. Farm Forestry Initiatives
21.3. Tamil Nadu Newsprint and Papers Limited

- 21.3.1. Company Overview
- 21.3.2. Business Strategies
- 21.3.3. Production and Export Sales Volume, FY'2010-FY'2013
- 21.3.4. Financial Performance, FY'2010-FY'2013
- 21.3.5. Farm Forestry Initiatives
- 21.4. JK Paper Limited
 - 21.4.1. Company Overview
 - 21.4.2. Business Strategies
 - 21.4.3. Production and Sales Volume, FY'2010-FY'2013
 - 21.4.4. Financial Performance, FY'2010-FY'2013
 - 21.4.5. Farm Forestry Initiatives
- 21.5. West Coast Paper Mills Limited
 - 21.5.1. Company Overview
 - 21.5.2. Business Strategies
 - 21.5.3. Production and Sales Volume, FY'2010-FY'2013
 - 21.5.4. Financial Performance, FY'2010-FY'2013
 - 21.5.5. Farm Forestry Initiatives
- 21.6. International Paper APPM Limited
 - 21.6.1. Company Overview
 - 21.6.2. Business Strategies
 - 21.6.3. Production and Sales Volume, FY'2010-FY'2013
 - 21.6.4. Financial Performance, FY'2010-FY'2013
 - 21.6.5. Farm Forestry Initiatives

22. INDIA PAPER INDUSTRY FUTURE OUTLOOK AND PROJECTIONS

- 22.1. By Consumption Volume, FY'2014 -FY'2018
- 22.2. By Turnover, FY'2014 -FY'2018
- 22.3. By Types of Paper, FY'2014-FY'2018
- 22.4. Cause and Effect Relationship in India Paper Industry

23. MACRO-ECONOMIC FACTORS IN INDIA PAPER INDUSTRY; HISTORICAL AND PROJECTED

- 23.1. Gross Domestic Product (GDP), FY'2007-FY'2018
- 23.2. Population of India, CY'2007-CY'2018
- 23.3. Government Spending on Education, FY'2007-FY'2018

24. APPENDIX

24.1. Market Definitions

24.2. Abbreviations

24.3. Research Methodology

Data Collection Methods

Approach

Variables (Dependent and Independent)

Final Conclusion

24.4. Disclaimer

List Of Figures

LIST OF FIGURES

Figure 1: Paper Production by Different Regions in the World in Percentage (%), FY'2013

Figure 2: India Paper Industry Value Chain

Figure 3: India Paper Market Size on the Basis of Production in Million Tons, FY'2007-FY'2013

Figure 4: India Paper Market Size on the Basis of Consumption in Million Tons and Per Capita Consumption in Kilograms, FY'2007-FY'2013

Figure 5: Per Capita Consumption of Paper across the World in Kilograms, FY'2013

Figure 6: India Paper Market Size on the Basis of Turnover in INR Million, FY'2007-FY'2013

Figure 7: India Paper Industry Installed Capacity in Million Tonnes and Capacity Utilization in Percentage (%), FY'2007-FY'2013

Figure 8: India Paper Industry Segmentation by Types of Paper (Paperboard and Industrial Packaging, Writing and Printing, Newsprint, and Specialty Papers) on the Basis of Production Volume in Percentage (%), FY'2013

Figure 9: India Paper Industry Segmentation by Types of Paper (Paperboard and Industrial Packaging, Writing and Printing, Newsprint, and Specialty Papers) on the Basis of Consumption Volume in Percentage (%), FY'2007-FY'2013

Figure 10: India Paper Industry Segmentation by Types of Paper (Paperboard and Industrial Packaging, Writing and Printing, Newsprint, and Specialty Papers) on the Basis of Revenue in Percentage (%), FY'2007-FY'2013

Figure 11: India Paper Market Segmentation by Raw Material Consumption in Percentage (%), FY'2013

Figure 12: India Paperboard and Industrial Packaging Paper Market Size on the Basis of Consumption in Million Tons, FY'2007-FY'2013

Figure 13: India Paperboard and Industrial Packaging Paper Market Segmentation by Types of Paper

Figure 14: India Paperboard and Industrial Packaging Paper Market Segmentation by Types of Paper on the Basis of Consumption in Million Tons, FY'2013

Figure 15: India Writing and Printing Paper Market Size on the Basis of Consumption in Million Tons, FY'2007-FY'2013

Figure 16: India Writing and Printing Paper Market Segmentation by Types of Paper

Figure 17: India Writing and Printing Paper Market Segmentation by Types of Paper () on the Basis of Consumption Volume in Percentage (%), FY'2007-FY'2013

Figure 18: India Newsprint Market Size on the Basis of Consumption Volume in Million

Tons, FY'2007-FY'2013

Figure 19: Market Share of Major Players in India Newsprint Market on the Basis of Production in Percentage (%), FY'2013

Figure 20: India Specialty Paper Market Size on the Basis of Consumption in Million Tons, FY'2007-FY'2013

Figure 21: Export and Import of Paper on the Basis of Volume in Million Tons, FY'2007-FY'2013

Figure 22: Import and Export of Glazed Newsprint on the Basis of Volume in Tons, FY'2007-FY'2013

Figure 23: Number of Paper Mills in India by Organized and Unorganized Sector in Percentage (%), FY'2013

Figure 24: Number of Paper Mills in India by Regional Distribution in Percentage (%), FY'2013

Figure 25: India Paper Industry Division of Cost in Paper Production by Raw Material, Power, Employee Cost, Chemicals, and Other Operating Expenses on the Basis of Contribution in Percentage (%), FY'2013

Figure 26: Changing Raw Material Consumption Pattern in India Paper Industry in Percentage (%), CY'1970-CY'2012

Figure 27: Ballarpur Industries Ltd. Production Volume and Sales Volume in Tons, FY'2010-FY'2013

Figure 28: Ballarpur Industries Ltd. Revenue in INR Million, FY'2010-FY'2013

Figure 29: ITC Ltd. Paper Production Volume in Tons, FY'2010-FY'2013

Figure 30: ITC Ltd. Paper Sales Revenue in INR Million, FY'2010-FY'2013

Figure 31: ITC Ltd. Plantations Under Farm Forestry in Hectares, FY'2010-FY'2013

Figure 32: Tamil Nadu Newsprint and Papers Ltd. Production Volume in Tons, FY'2010-FY'2013

Figure 33: Tamil Nadu Newsprint and Papers Ltd. Export Sales Volume in Tons, FY'2010-FY'2013

Figure 34: Tamil Nadu Newsprint and Papers Ltd. Revenue in INR Million, FY'2010-FY'2013

Figure 35: Tamil Nadu Newsprint and Papers Ltd. Plantations Under Farm Forestry and Captive Plantation Schemes in Hectares, FY'2010-FY'2013

Figure 36: JK Papers Ltd. Production Volume and Sales Volume in Tons, FY'2010-FY'2013

Figure 37: JK Papers Ltd. Revenue in INR Million, FY'2010-FY'2013

Figure 38: West Coast Paper Mills Ltd. Production Volume and Sales Volume in Tons, FY'2010-FY'2013

Figure 39: West Coast Paper Mills Ltd. Paper Sales Revenue in INR Million, FY'2010-FY'2013

Figure 40: International Paper APPM Ltd. Production Volume and Sales Volume in Tons, FY'2010-FY'2013

Figure 41: International Paper APPM Ltd. Revenue in INR Million, FY'2010-FY'2013

Figure 42: India Paper Industry Future Projections on the Basis of Consumption in Million Tons, FY'2014-FY'2018

Figure 43: India Paper Industry Future Projections on the Basis of Turnover in INR Million, FY'2014-FY'2018

Figure 44: India Paper Industry Future Projections by Types of Paper (Paperboard and Industrial Packaging, Writing and Printing, Newsprint, and Specialty Papers) on the Basis of Consumption Volume in Percentage (%), FY'2014-FY'2018

Figure 45: India Gross Domestic Product (GDP) in INR Million, FY'2007-FY'2018

Figure 46: India Total Population in Million, CY'2007-CY'2018

Figure 47: India Government Spending on Education in INR Million, FY'2007-FY'2018

List Of Tables

LIST OF TABLES

Table 1: India Paper Industry Segmentation by Types of Paper (Paperboard and Industrial Packaging, Writing and Printing, Newsprint, and Specialty Papers) on the Basis of Consumption in Million Tons, FY'2007-FY'2013

Table 2: India Paper Industry Segmentation by Types of Paper (Paperboard and Industrial Packaging, Writing and Printing, Newsprint, and Specialty Papers) on the Basis of Revenue in INR Million, FY'2007-FY'2013

Table 3: India Writing and Printing Paper Market Segmentation by Types of Paper (Creamwove, Maplitho, Copier, and Coated Paper) on the Basis of Consumption in Million Tons, FY'2007-FY'2013

Table 4: Competitive Landscape of Major Players (Emami Paper Mills, Shree Rama Newsprint, Khanna Papers, Hindustan Newsprint) in Newsprint Market in India

Table 5: Competitive Landscape of Major Players (Pudumjee Group, Yash Papers Limited, ITC Ltd, Premier Tissues, Orient Paper and Industries Ltd) in Specialty Paper Market in India

Table 6: Prices of Imported Wood in India by Softwood and Hardwood in USD per ton, March '2012 and March' 2013

Table 7: Prices of Domestic Recycled Paper in India by Old Corrugated Containers, Old Notebooks, Old Newsprint in INR per ton, March' 2012 and March' 2013

Table 8: Prices of Imported Recycled Paper in India by Old Corrugated Containers, Brown grade NDLC, Old Newsprint, Envelope Cuttings, and Hard White Shavings in USD per ton, March'2012 and March' 2013

Table 9: Prices of Paperboard and Industrial Packaging Paper by Kraft, Duplex Board, and Art Board in INR per ton, March' 2012 and March' 2013

Table 10: Prices of Writing and Printing Paper by Creamwove, Maplitho, Copier, and Coated Paper in INR per ton, March'2012 and March' 2013

Table 11: Prices of Newsprint in India, FY'2013

Table 12: Custom Duty on Import of Paper, Paperboard, and Wood Pulp

Table 13: Central Excise Duty on Import of Paper and Paperboard

Table 14: Minimal National Standards for Waste Gases Emission

Table 15: Minimal National Standards for Waste-water Emission

Table 16: SWOT Analysis of India Paper Industry

Table 17: Market Share of Major Players on the Basis of Production in Percentage (%), FY'2013

Table 18: Market Share of Major Players on the Basis of Revenue in Percentage (%), FY'2013

Table 19: India Paper Industry Future Projections by Types of Paper (Paperboard and Industrial Packaging, Writing and Printing, Newsprint, and Specialty Papers) on the Basis of Consumption Volume in Percentage (%), FY'2014-FY'2018

Table 20: Cause and Effect Relationship Analysis between Industry Factors and Expected Paper Industry Prospects in India

Table 21: Correlation Matrix of the India Paper Industry

Table 22: Regression Coefficients Output

I would like to order

Product name: India Paper Industry Outlook to FY'2018 - Steered by Industrialization and Literacy Levels

Product link: <https://marketpublishers.com/r/l857A2531D5EN.html>

Price: US\$ 800.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/l857A2531D5EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

****All fields are required**

Customer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970