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

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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

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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

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