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Research Report on China Paper Industry, 2014-2018

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Abstracts

The paper industry in China develops rapidly after China joined WTO. In 1999, total output volume of paper and paperboard in China was only 29 million tons while the number topped 100 million tons in 2010 for the first time. The CAGR of the 11 years was 11.9%. The growth rate began to decline afterward because of the huge base amount. In 2013, the output volume of machine-made paper and paperboard in China was approximately 115.14 million tons, up by merely 1.22% YOY.

There are a large amount of paper manufacturers with low industrial concentration in China. By the end of 2013 there are about 7,000 paper and paper product manufacturers in China. The average annual production per manufacturer was less than 20 thousand tons, which was significantly lower than that in developed countries. Only 6 paper manufacturers in China had the annual output volume of over 2 million tons, and 10 other manufacturers' annual output volume reached 1 million tons in 2012.

The import and export of wood pulp, waste paper and paperboard in China remained stable in 2013. The import volume basically remained the same while the export volume rebounded slightly. Meanwhile the unit price of import went up a little and that of export declined sharply. As of the import and export value, the former did not change while the later went down. Trade deficit still existed between import and export of wood pulp and paper products in 2013.

The export volume of paper in China is less than 10% of domestic output. In addition, in order to protect the environment and especially to ensure domestic supply, Chinese government does not allow paper export in large quantities. Unlike other manufacturing industries, there is no tax rebate for paper export in China. Waste paper processing trade is also restricted, and there are no subsidies for the paper industry.

Most of the world's major paper manufacturers have accomplished the integration of

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forest, pulp and paper. However, most paper manufacturers in China lack their own forest-paper system and thus qualified paper fiber supply depends greatly on import. The situation directly leads to unstable performance and low profit among the manufacturers. Insufficient supply of raw fiber materials seriously hinders the development of paper industry in China.

Moreover, the paper industry in China is faced to four unsolved problems right now. The first problem is resource shortage caused by high geographic concentration. The second problem is the unreasonable product structure. The third one is the low product level caused by lagging machines while the last one is serious environment pollution.

As economy develops, Chinese people's income increases, which promotes the demand of paper in industrial packaging, work and life. It is predicted that demand of paper products in Chinese market will keep rising in 2014-2018. At the same time, many investment opportunities in the paper industry are created in the process of product structure upgrade ,which will surely attract more investors.

Through this report, the readers can acquire the following information:

Overview of China Paper Industry

Production and Demand Status of China Paper Industry

Competition Status of China Paper Industry

Import and Export Status of Paper Products in China

Key Enterprises in China Paper Industry and the Operation Status

Forecast on Development of China Paper Industry

The following enterprises and people are recommended to purchase this report:

Paper Manufacturers

Paper Product Trading Enterprises

Enterprises Related to Paper Industry Chain

Investors/Research Institutes Concerned About China Paper Industry

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9.4.2 Product Upgrade (The original Gi’an Group Co., Ltd. merged with Anhui Shanying Paper Industry Co., Ltd in 2013.)

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SELECTED CHARTS

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