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Research Report on China Papermaking Industry, 2017-2021

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Abstracts

Description

With the development of Chinese economy, China papermaking industry recently maintained the momentum of rapid growth. The total output volume of paper and paperboard in China increased from 30.5 million tons in 2000 to 107.1 million tons in 2015 with CAGR reaching 8.7%.

Different sub-industries of China papermaking industry differ in degree of prosperity. With the rise of Internet in China, traditional print media such as newspaper, magazines and board books were on the wane with declining circulation, which led to the descending output volume of newsprint in China. With the increasing living standard of Chinese residents, the output volume of household paper keeps growing accordingly. The development of e-commerce in China brings about the increase of expressage, which promotes the increasing output volume of liner board and packaging paper in China.

It is difficult for the insufficient supply of fiber resources in China papermaking industry to satisfy the requirements of production capacity expansion. That is to say, fiber materials become the bottleneck restricting the development of China paper industry. In 2015, the consumption volume of wood pulp accounted for 28% of the total raw material consumption volume, and waste pulp accounted for 65%. The non-wood pulp only accounted for 7%. In recent years, the proportion of pulp and waste pulp kept increasing, while the proportion of non-wood pulp raw materials continued falling.

Waste paper plays an increasingly important role in supporting the development of China papermaking industry. The import volume of waste paper in China increased from

2.516 million tons in 1999 to 29.28 million tons in 2015 with CAGR reaching 16.6%. Supply and demand determine the price. With the rapid growth of demand, the price of imported waste paper also enjoyed a sharp increase. In 1999, the price of imported waste paper was 97 USD/ton, and it reached 180.3 USD/ton in 2015. China imported large quantities of waste paper and pulp to solve the shortage of raw materials. However, it led to over dependence on the imported raw materials of papermaking industry. Up to 2015, the imported pulp and the waste pulp converted by imported waste paper accounted for over 40% of the total raw materials.

Presently, there are many papermaking enterprises in China with low market concentration rate. Up to the end of 2015, there were 2,800 papermaking and paper product enterprises whose annual sales revenue exceeded CNY 20 million in China. On average, the annual output volume of one papermaking enterprise was less than 40,000 tons, and there was a large gap between China and the average level of international papermaking enterprises in developed countries. In 2015, there were less than 20 papermaking enterprises whose annual output volume exceeded 1 million tons in China.

The export volume of paper in China accounts for less than 3% of the total domestic output volume. In addition, in order to protect the environment and especially to ensure domestic supply, the export of paper is not encouraged by Chinese government. Unlike other industries, there are neither tax rebates for paper export nor subsidies for the paper industry in China.

Most of the world's large-scale paper manufacturers accomplished the integration of forest, pulp and paper. However, most paper manufacturers in China failed to form their own forest-paper industry and thus high quality paper fiber depends greatly on import. The external impact on costs of raw materials directly led to unstable operation performance. Insufficient supply of fiber raw materials seriously hindered the development of paper industry in China. In the long run, the insufficient raw materials of papermaking in China will be a critical problem in the development of papermaking industry.

With the development of Chinese economy and e-commerce industry as well as the enhancement of residential living standard, the overall demand for paper products will keep the annual growth rate of 2% or more. Therefore, there exists certain investment opportunities in China papermaking industry.

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

Development Environment Faced by China Papermaking Industry

Supply and Demand of China Papermaking Industry, 2011-2016

Market Competition of China Papermaking Industry

Import and Export Status of Paper Products in China, 2011-2016

Key Enterprises in China Paper Industry and Their Operation Status

Development Status of Forestry-Pulp-Paper Integration in China

Price Trend of Raw Materials in China Papermaking Industry

Major Driving Forces and Market Opportunities in China Papermaking Industry

Threats and Challenges Faced by China Papermaking Industry

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