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Research Report on China's Papermaking Industry, 2012

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Abstracts

In recent years, China becomes one of the countries with the quickest productivity increase in world's papermaking industry. Since 2006, the production of China's machine-made paper and paper boards maintains a steady increase momentum. In 2011, the production reached 110.34 million tons, with an increase of 13.24% YOY. There is a large gap between output and consumption of China's pulp annually. For paper and paper boards, the productivity continually expands while that of certain paper varieties will be at risk of over productivity. Packaging paper and culture paper are still the priority. China's chrome paper market suffers from double pressure from the export obstacle and over productivity. The market of news paper markedly declines; in recent two years, the productivity of case boards will largely expands, which will also have such secret worries in the long term.

Although forestry-paper integration is enhanced and it is encouraged to be implemented in enterprises by the government, it still relies on the import of raw materials to a great extent because of the rapid growth of output. The output of most paper products is predicted to basically meet the demand of domestic markets, so the import volume of products is annually on the decrease. Moreover, the export volume of China's paper products also constantly rises in recent years.

Productivity of China's paper and paper boards will further expands within the future several years. Meanwhile, with the government's forceful promotion of energy-saving and emission reduction, a batch of backward productivity will be replaced and new programs will be obviously characterized by the large scale. Various papermaking enterprises continue the expansion, high-end products of papermaking industry will be short and the supply of low-end products will distinctly exceeds demand.

It is predicted that in the future several years, the average annual increase rate of China's paper and paper board consumption is no less than 5%. The product structure will be continuously optimized, which is adjusted in the direction of light basis weight, functionalization, high quality and multi-variety. The paper product structure with complete functions adapting to different levels and pluralism market demands will be gradually formed.

The uncertainty faced by China's papermaking industry is estimated to increase in the future several years. The main changes are as follows: the uncertainly of domestic and overseas economic environment; strict trend of environment-protection and industrial polices; short supply of most products; fluctuation of the price change of raw materials; quickening of industrial consolidation; oversupply of productivity, and so on.

The papermaking industry is a capital-intensive industry, so papermaking enterprises must follow the scale and international roads to realize the rapid development or they are easy to be eliminated. Accompanied by the structure adjustment of papermaking industry and in the pursuit of emerging regional markets, with the further integration of supply chain, it is predicted that the merger and acquisition of China's papermaking industry will endlessly proceed in the following years.

China becomes the largest production and consumption country of paper and paper boards in the world. In terms of consumption level per capita, China's paper products have a great gap compared with global advanced level, particularly levels of developed countries. There is still a large space for the development of China's papermaking industry.

More following information can be acquired through this report:

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Import and Export of China's Paper Products

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