India Paper Industry Outlook to 2018
- Steered by Industrialization and Literacy Levels
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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. The production of paper jumped to ~ million tons in FY’2012 from ~ million tons in FY’2011, owing to the noteworthy increase in manufacturing capacity of the industry.

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

The total consumption of paper in FY’2013 was ~ million tons which has grown from ~ million tons in FY’2007, registering a CAGR of 6.9 % during FY’2007-FY’2013. In FY’2013, the per
capita consumption of paper in India was ~ kilograms, registering a CAGR of 3.9 % during FY’2007-FY’2013.

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

The installed capacity increased at a CAGR of 7.5% from ~ million tons in FY’2007 to ~ million tons in FY’2013. The capacity utilization in FY’2013 was ~% as compared to 86.9% in FY’2012.
INDIA PAPER MARKET SEGMENTATION

BY TYPES OF PAPER (PRODUCTION AND CONSUMPTION VOLUME), 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. The paperboards and industrial packaging segment remained the key contributor to the paper industry of India during FY’2007-FY’2013 and held a share of ~% in FY’2013.
Figure: 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

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- Newsprint
- Specialty Papers
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**BY RAW MATERIAL CONSUMPTION, FY’2013**

In FY’2013, it is estimated that imported raw materials catered nearly ~% to the domestic paper production in India. Recycled fiber held the highest share of ~% to the total raw material requirement for paper production in India in FY’2013.

Figure: India Paper Market Segmentation by Raw Material Consumption in Percentage (%), FY’2013
INTRODUCTION AND MARKET SIZE, FY’2007-FY’2013

The total production of paperboards and industrial packaging papers in FY’2013 was estimated to be 5.0 million tons. The Indian packaging industry in FY’2013 was estimated at INR ~ million, growing at 11.0% annually and is expected to cross INR ~ million by the year 2015.

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

INDIA PAPERBOARD & INDUSTRIAL PACKAGING PAPER MARKET SEGMENTATION

Kraft paper had the largest consumption in the paperboards and industrial packaging market in India in FY’2013. With 2.9 million tonnes consumption volume, kraft paper accounted for 52.5% share in the market captured by paperboards and industrial packaging papers.
Creamwove paper is the largest segment in the writing and paper market of India, and had a consumption volume of ~ million, accounting for ~% share in the total consumption of writing and printing paper in India in FY’2013. The consumption of coated paper increased to ~ million tons in FY’2013 from ~ million tons in FY’2007, growing at a CAGR of 8.2% during FY’2007-FY’2013.
Figure: India Writing and Printing Paper Market Segmentation by Types of Paper (Creamwove, Maplitho, Copier, Coated) on the Basis of Consumption Volume in Percentage (%), FY’2007-FY’2013

Table 1: 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

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The newsprint market in India in FY’2013 was majorly dominated by Emami Paper Mills Ltd., Khanna Papers Ltd., Shree Rama Newsprint Ltd., and Hindustan Newsprint Ltd.

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

- Emami Paper Mills Ltd.
- Khanna Papers Ltd.
- Shree Rama Newsprint Ltd.
- Hindustan Newsprint Ltd.
- Others
INDIA PAPER INDUSTRY IMPORT AND EXPORT SCENARIO

During CY’2010-CY’2011 nearly ~ million tonnes of newsprint was imported against the total consumption of around ~ million tonnes, whereas ~ million tonnes was exported.

Figure: Import and Export of Glazed Newsprint on the Basis of Volume in Tons, FY’2007-FY’2013
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<th>Types of Writing and Printing Paper</th>
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<th>Price Range, March’ 2012</th>
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MARKET SHARE OF MAJOR PLAYERS IN INDIA PAPER INDUSTRY, FY’2013

BY PRODUCTION VOLUME, FY’2013

The largest player in the Indian paper industry in FY’2013 was Ballarpur Industries Ltd. (BILT) with a production volume of ~ tonnes contributing a share of ~% to the total production of paper in India.
Table: Market Share of Major Players on the Basis of Production in Percentage (%), FY’2013

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<tr>
<th>Leading Companies</th>
<th>Production Volume (Tons)</th>
<th>Market Share (%)</th>
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<td>Ballarpur Industries Ltd.</td>
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<td>ITC Ltd.- PSBD</td>
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<td>Tamil Nadu Newsprint &amp; Paper Ltd.</td>
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<td>West Coast Paper Mills Ltd.</td>
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<td>JK Paper Ltd.</td>
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<td>International Paper APPM Ltd.</td>
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<td>Century Pulp &amp; Paper Ltd.</td>
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<td>Hindustan Paper Corporation Ltd.</td>
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<td>NR Aggarwal Industries Ltd.</td>
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<td>Seshasayee Paper &amp; Boards Ltd.</td>
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INDIA PAPER INDUSTRY FUTURE OUTLOOK AND PROJECTIONS

BY CONSUMPTION VOLUME, FY’2014 -FY’2018

The total 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 writing and printing paper market in India is estimated to reach ~ million tons in FY’2018 from ~ million tons in FY’2013, growing at a CAGR of 6.4% during the period.
Figure: 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: 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

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