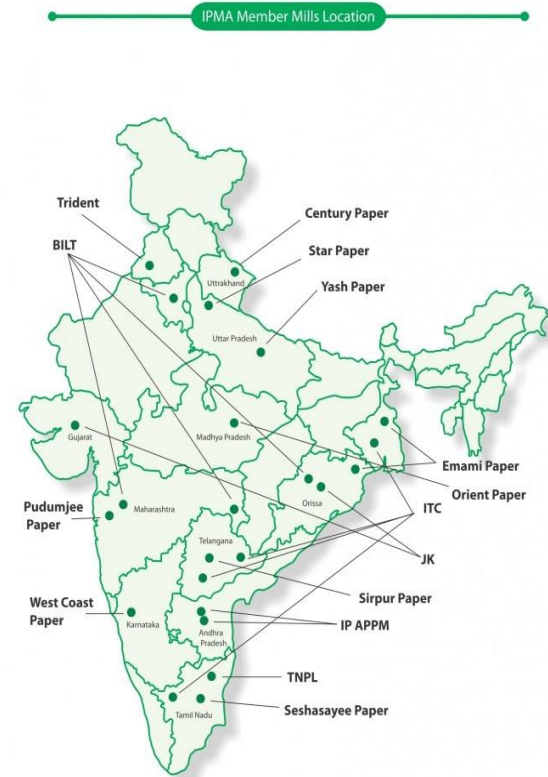




FOREST, WOOD, PULP AND PAPER SECTOR

Industry Overview

- According to a report released by Indian Paper Manufacturers Association (IPMA) detailing the paper industry overview for 2017-2018, the per capita paper consumption in India is currently around 13-kgs, while the global average is 57-kgs. This is projected to increase to at least 17-kgs by 2024-25.
- The Indian paper industry produces 10.11 million tons paper per annum, 1.6 of the total world production of 394 million tons, paperboard and newsprint.
- India's share in world production of paper is about 3.7%, with estimated production of over 15-million tpa.
- The report said the paper industry has the market size of more than 17-million tonnes of paper and growing at around 7% per annum. Meanwhile, the annual turnover of the paper industry is estimated to be Rs 60,000-crore, with around INR 4,500-crore contribution to the exchequer.
- According to the report, the reasons for growth of paper industry in country are continuous demand for education and literacy, increasing organised retail, growth in eCommerce, FMCG, pharma/ healthcare sector, demand of quality packaging, ban on plastic (especially polythene bags) and increment in demand of eco-friendly paper bags, continuously increasing demand of ready-to-eat food and printed stationary.



Business Categories

The paper industry in India could be classified into three categories according to the raw material consumed.

01

Wood based

Forest Products



02

Waste paper based

Paper Products



03

Agro based

Government Schemes

During 12th Five year plan research was carried out under 3 major schemes viz. Raw Material and Product Development, Energy Conservation & Environmental Management and Infrastructure Development and Capacity Building Activities, Nine (9) sub activities were taken up under these major heads. The scheme was launched in Plan (2012-2017), with effect from April 2012

❑ ACTIVITY A- RAW MATERIAL AND PRODUCT DEVELOPMENT

Sub Activities:

- a. Utilization of Rice Straw and other Non-Conventional Raw Materials for Production of Various Grades of Pulp.
- b. New approaches in processing & paper making of recycled fiber to improve the quality of end product.

❑ ACTIVITY B- ENERGY CONSERVATION & ENVIRONMENTAL MANAGEMENT

- c. Incremental Capacity Enhancement and Improved Efficiency of Conventional Chemical Recovery System in Wood and Non wood based Paper Mills.
- d. Implementation of enzyme applications in Pulp & Paper Industry.
- e. Water conservation through application of kidney technologies in Indian Pulp & Paper Industry.

❑ ACTIVITY C- INFRASTRUCTURE DEVELOPMENT AND CAPACITY BUILDING ACTIVITIES

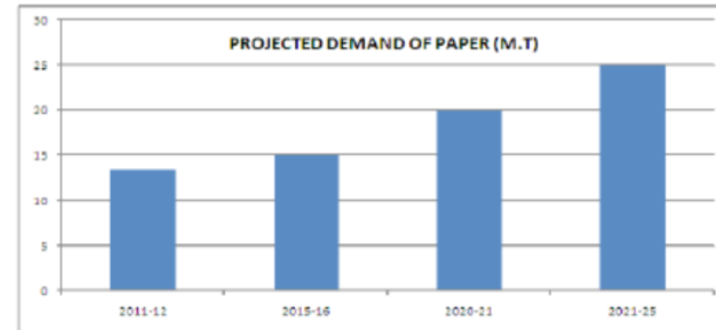
- f. Setting up of Paper board and Specialty paper testing facilities at CPPRI
- g. Modernization of CPPRI Library
- h. Strengthening of training and HRD infrastructure in Pulp, Paper and Allied industry.
- i. Infrastructure and Capacity Building (Infrastructure for Civil / Electrical/ Mechanical/ Information Technology & Maintenance



Business Scope in Pulp and Paper Industries

- The Indian Paper Industry accounts for about 1.6% of the world's production of paper and Paperboard. Paper In India is expected to see an average growth of 7 per cent during the next year according to prediction by the Indian Pulp and Paper Technical Association.
- The sector is expected to grow 7 per cent per annum. From the current about Rs 35,000 cr. size, the turnover of the industry is likely to touch 60,000 mark by 2025, said IPPTA. Currently, the Indian industry is accounts to about 2.5 per cent of the global production of paper.
- The mills use a variety of raw material viz. wood, bamboo, recycled fibre, bagasse, wheat straw, rice husk, etc.; approximately 35% are based on chemical pulp, 44% on recycled fibre and 21% on agro-residues.
- The per capita consumption of India stands at only 9.3 kg compared to China's 42 kg, Indonesia's 22 kg, Malaysia's 25 kg and the US' 312 kg. Studies have shown that the growth of paper consumption changes from linear to exponential trends once the GDP growth rate crosses the double digit mark. Analysts often draw comparisons between the growth seen in bottled drinking water and tissue paper industries. Even if one assumes an average 9% GDP growth rate in the medium term, linear extrapolation suggests that by 2025, the country will consume over 24 million tons of paper

- The industry employs 0.37 million people directly and 1.37 million indirectly. The major players of the industry are lo-cated in Andhra Pradesh, Tamil Nadu, Maharashtra, Punjab, Madhya Pradesh and Gujarat. In terms of numbers, Gujarat tops the tally with 130 units, followed by U.P (115), Maharashtra (112) and Tamil Nadu(88). Paper consumption is poised for a big leap forward in sync with the economic growth and is estimated to touch 13.95 million tons by 2015-16



•□Projected Consumption of Paper (Million Tons)

Geographical Distribution of Paper Industry in India

01

Maharashtra

It has 63 mills, accounts for 16.52 per cent of the installed capacity and produces 18 per cent of the paper produced in India.

Andhra Pradesh

This state has 19 mills, accounts for 11.3 per cent of installed capacity and 13 per cent of India's total production of paper.

02

03

Madhya Pradesh

This state has large tracts under cellulosic raw materials viz., bamboo, sabai grass, eucalyptus, etc. and provides solid base to paper industry. It has 18 mills which account for 6.62 per cent of the total installed capacity of India.

Karnataka

It has 17 mills accounting for 5.48 per cent of the total capacity of India. The paper industry of this state use locally grown bamboo and bagasse obtained from the sugar mills.

04

Major Centers

❑ Maharashtra

- ✓ Sangli
- ✓ Kalyan
- ✓ Mumbai,
- ✓ Pune
- ✓ Balarshah
- ✓ Pimpn
- ✓ Nagpur
- ✓ Bhiwandi,
- ✓ Nandurbar
- ✓ Tumur
- ✓ Khopoli
- ✓ Kamptee
- ✓ Vikroli
- ✓ Chinchwad

❑ Andhra Pradesh

- ✓ Rajahmundry
- ✓ Sirpur
- ✓ Tirupati
- ✓ Kurnool
- ✓ Khammam
- ✓ Srikakulum
- ✓ Pallancheru
- ✓ Nellore
- ✓ Bhadrachalam
- ✓ Kakinada
- ✓ Apidik
- ✓ Bodhan

❑ Madhya Pradesh

- ✓ Bhopal
- ✓ Amlpi,
- ✓ Ratlam
- ✓ Rajgarh
- ✓ Vidisha
- ✓ Abdullaganj
- ✓ Rewa
- ✓ ndore

❑ Karnataka

- ✓ Bhadravati
- ✓ Dandoli
- ✓ Nandangaud
- ✓ Belagola
- ✓ Munirabad
- ✓ Harihar
- ✓ Mundyud
- ✓ Bangalore
- ✓ Mandya
- ✓ Ramnagaram
- ✓ Krishnarajsagar



Grant Of Licence for Wood Based Industry

1. Eligibility Criteria:

Any person desirous to establish or run a wood industry in a specific area.

2. Fees including the Payment Mode: Each application shall be accompanied by a non-refundable fee as prescribed below:-

- a. Saw Mill, Match Splint/ Katha/ Agar wood Oil Manufacturing/ Extracting unit. Rs.500.00
- b. Veneer/ Plywood Mill/ Hardboard/ Particle Board/ Match Manufacturing Unit & any other wood based industry. Rs. 2000.00
- c. Grant of a license shall be made subject to payment of licence fee.
- d. Saw Mill, Match Splint/ Katha/ Agar wood Oil Manufacturing/ Extracting unit and any wood based industry other than listed below.

3. Accompanying Documents required including:

Sales tax/ Income tax Clearance Certificate must accompany the application for grant/ renewal

4. Important Timelines:

60 days from the date of receipt of application form, completed in all respect along with documents as per checklist.





WEST COAST PAPER MILLS LIMITED



Kuantum Papers Ltd

The Paper Makers



JK PAPER LTD.



SATIA INDUSTRIES LIMITED
AN ISO 9001, 1400 & OHSAS 18001 COMPANY





Plant & Machinery

- ❖ waste paper recycling plant
- ❖ Fourdrinier machine
- ❖ Accujet high turbulence headbox
- ❖ mill winder
- ❖ synchronous fly sheeters
- ❖ pulper machine
- ❖ Deinking Machine
- ❖ Thickeners
- ❖ Dispersion System
- ❖ Deflaker Machines





Associations

- Indian Pulp & Paper Technical Association
- Indian Paper Manufacturers Association
- Indian Agro & Recycled Paper Mills Association
- Indian Newsprint Manufacturers Association





Colleges

- IIT Roorkee - Indian Institute of Technology
- RTMNU Nagpur - Rashtrasant Tukadoji Maharaj Nagpur University
- Laxminarayan Institute of Technology, Nagpur
- Government Polytechnic College, Kannur
- Seshasayee Institute of Technology, Tiruchirappalli
- FRI Dehradun - Forest Research Institute
- Government Polytechnic college Kannur





BUSINESS
CHARCHA

Thank You