

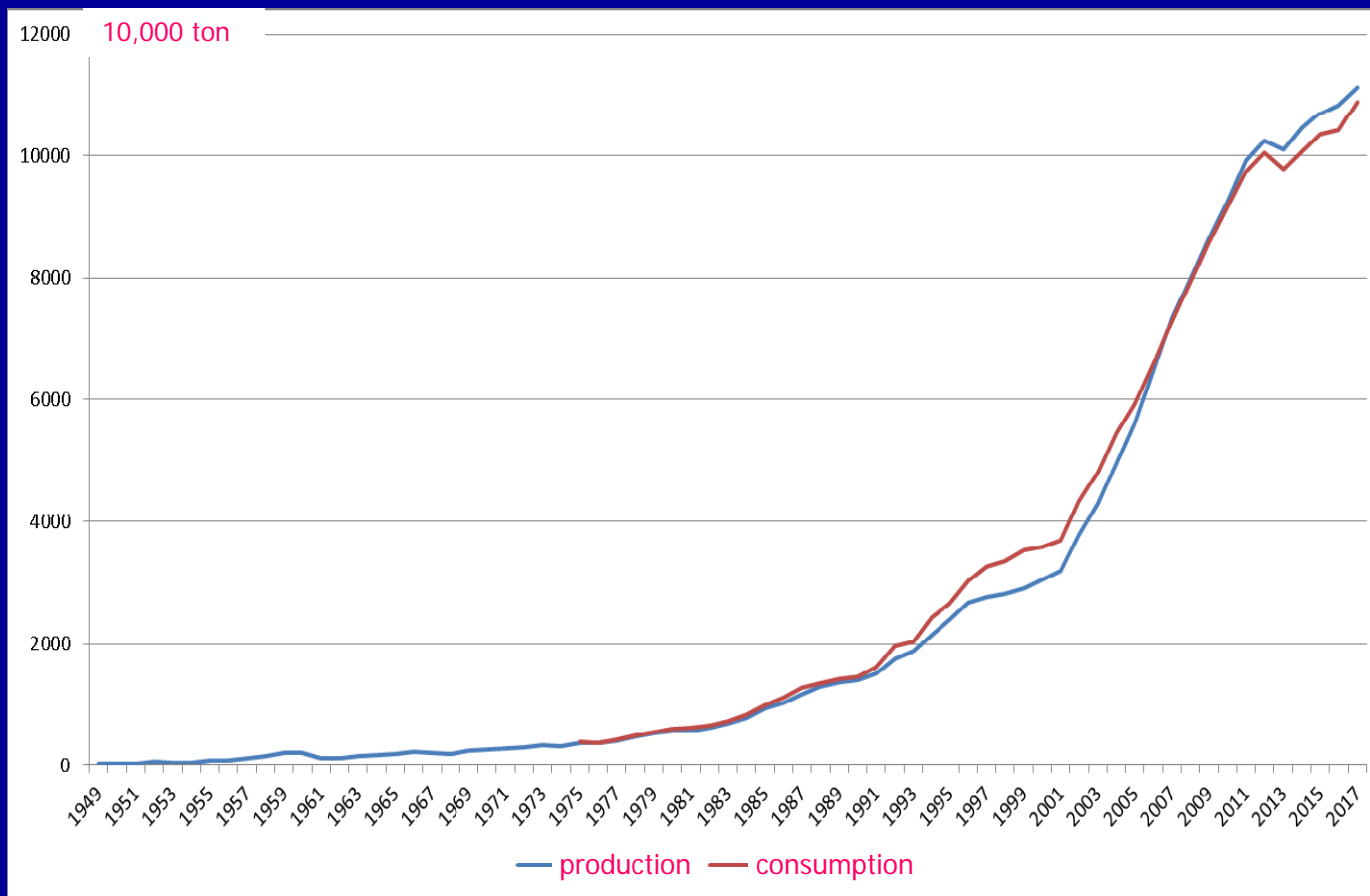
The Current Status And Development of Paper Industry in Mainland China

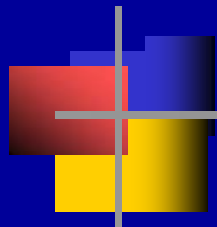
China Paper Association

Nov. 1th 2019

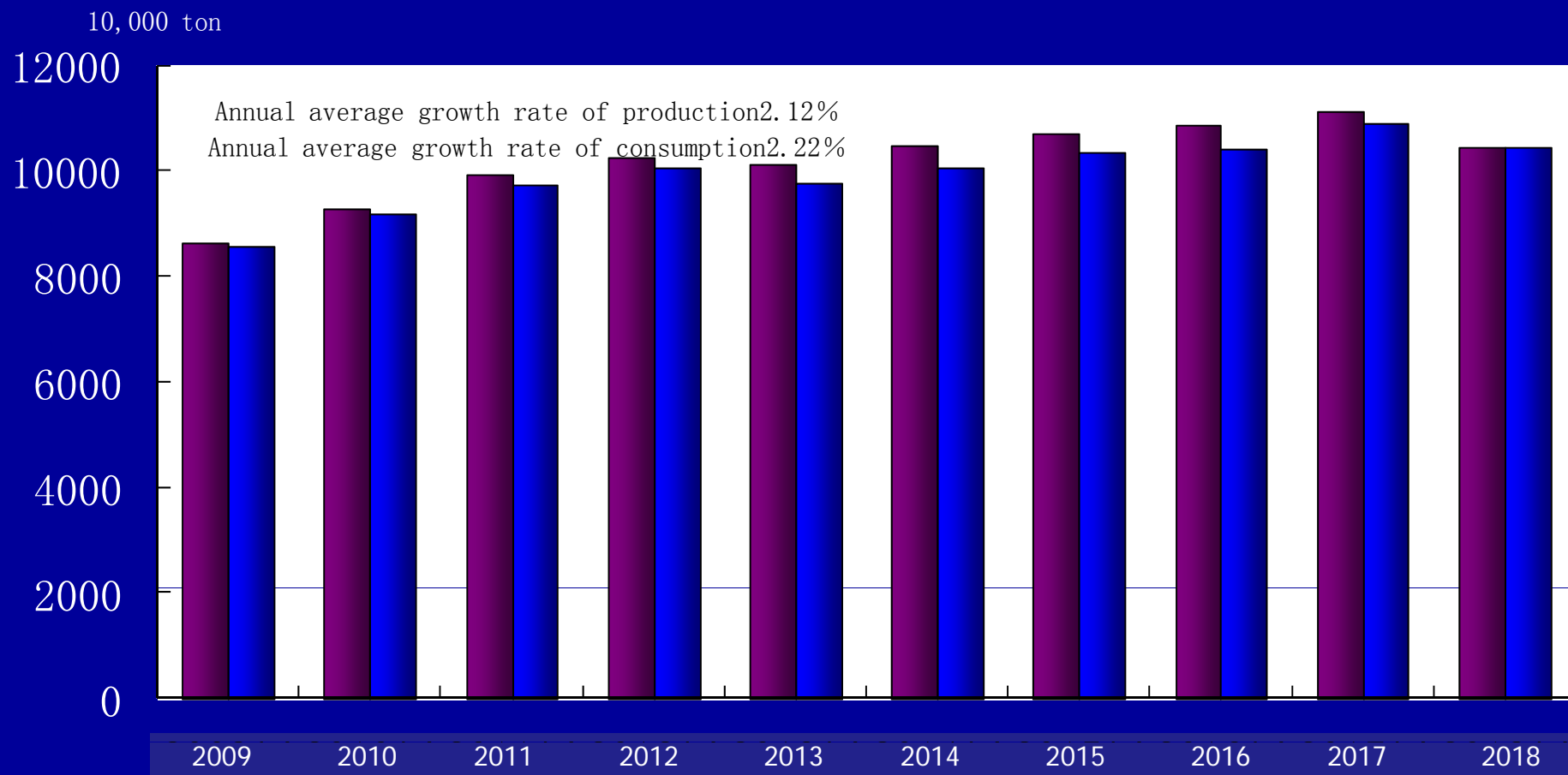
P & PB Production and Consumption

- 1 · Market demand drives the development of paper industry
- 2 · from shortage to basically meeting domestic demand
- 3 · balance between production and demand, maintain a certain amount of import and export





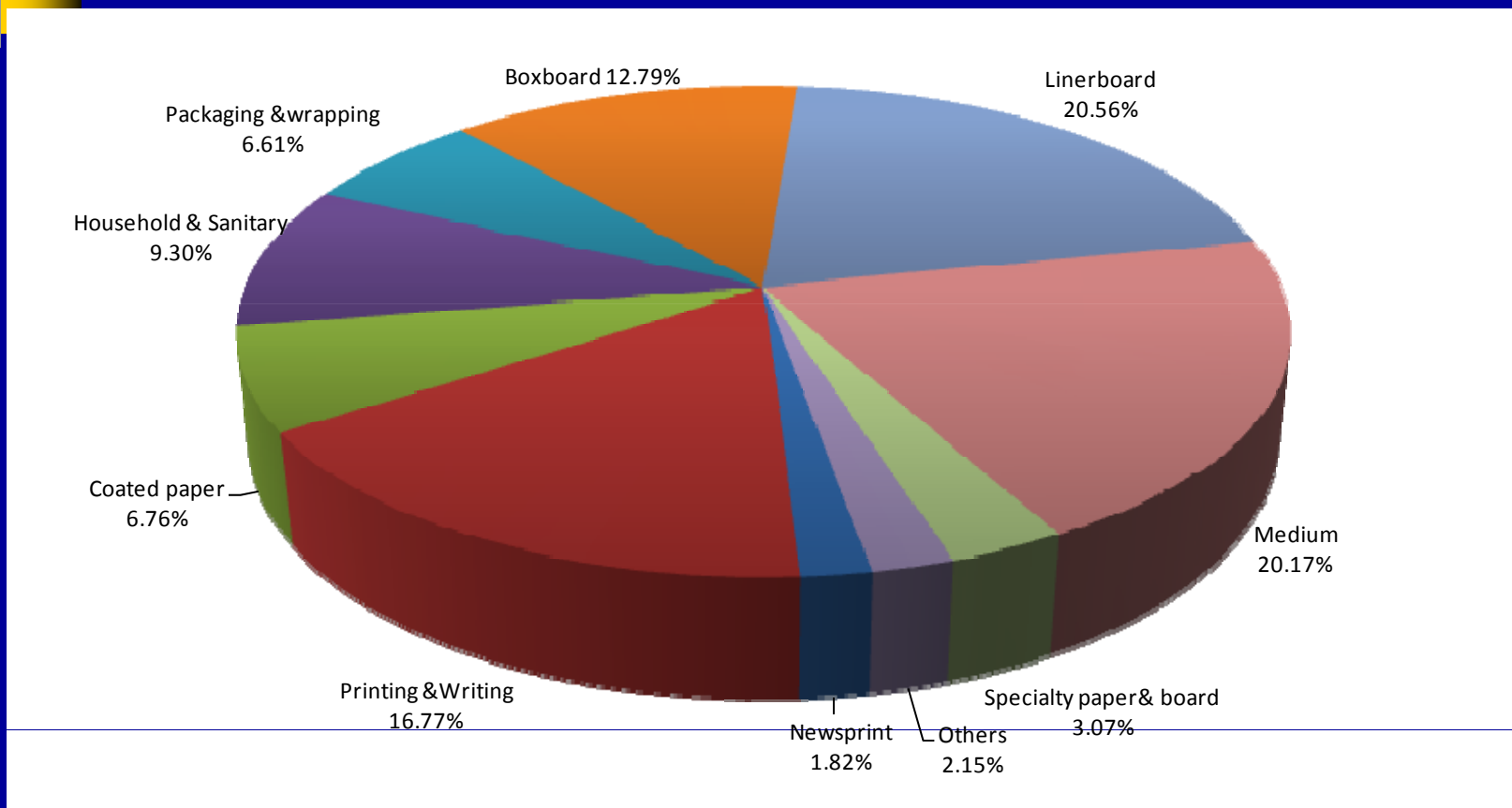
P & PB Production and Consumption



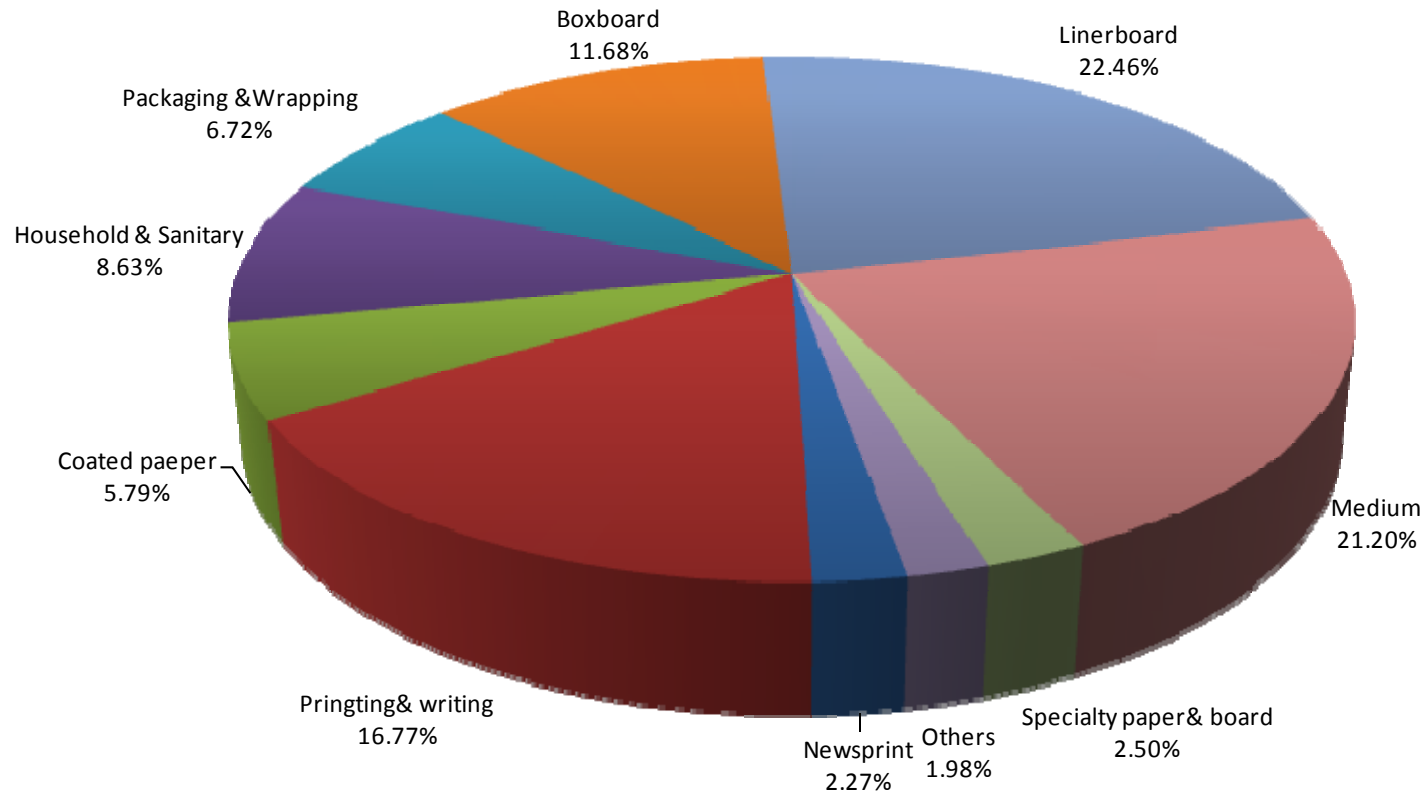
P & PB Production and Consumption 2018

Grades	production			consumption		
	2017	2018	%	2017	2018	%
Total (×10,000) ton	11130	10435	-6.24	10897	10439	-4.20
1.Newsprint	235	190	-19.15	267	237	-11.24
2.Printing& Writing	1790	1750	-2.23	1744	1751	0.40
3.Coated Paper	765	705	-7.84	634	604	-4.73
4.Household and Sanitary	960	970	1.04	890	901	1.24
5. packaging & wrapping	695	690	-0.72	707	701	-0.85
6.Boxboard	1430	1335	-6.64	1299	1219	-6.16
7.Linerboard	2385	2145	-10.06	2510	2345	-6.57
8.Medium	2335	2105	-9.85	2396	2213	-7.64
9.Specialty paper & board	305	320	4.92	249	261	4.82
10.Others	230	225	-2.17	201	207	2.99

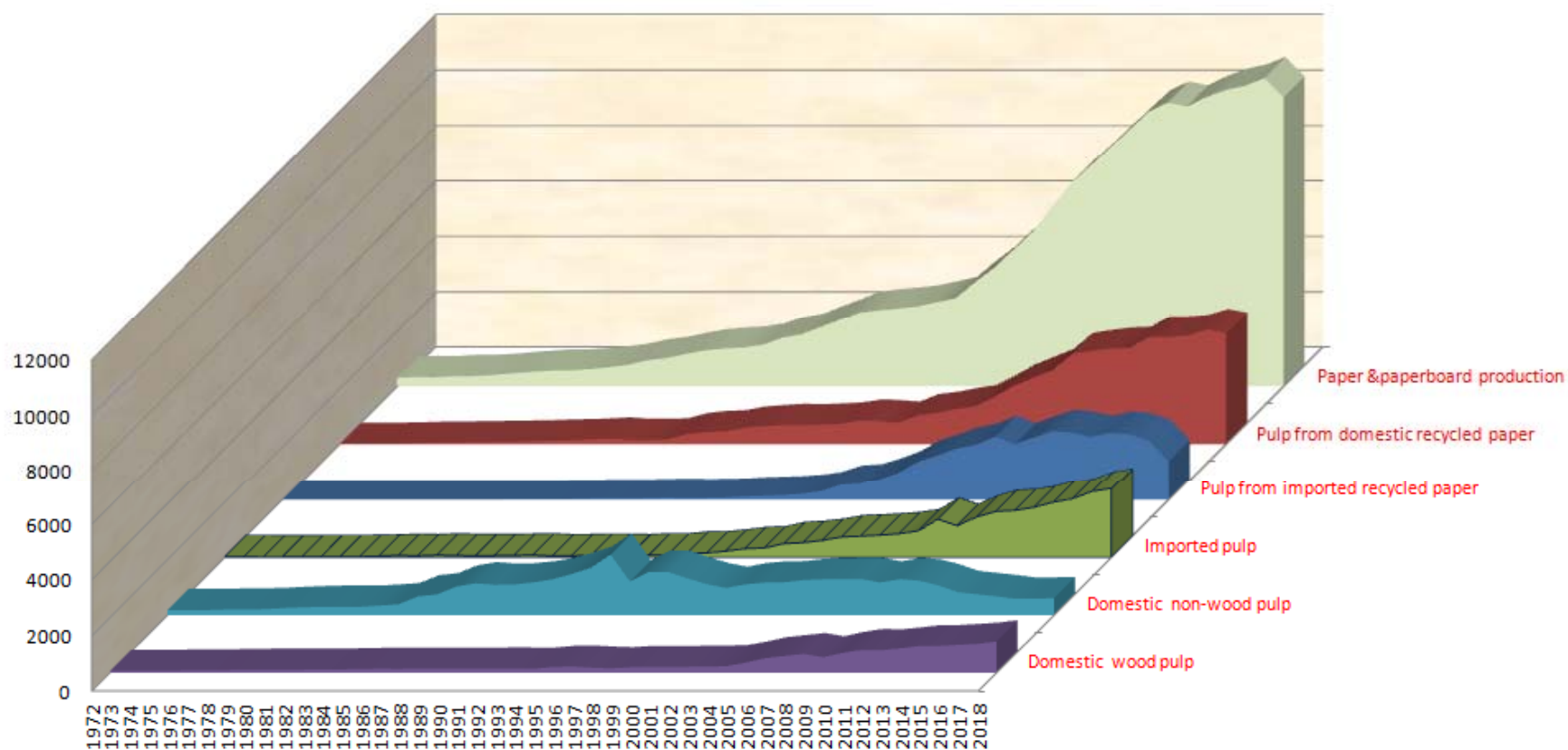
Weight — Production of Each Grade VS Total (2018)



Weight — Consumption of Each Grade VS Total (2018)



Raw material structure (10,000 ton)



Total pulp consumption in 2018 is 93.87 million tons : wood pulp consumption is 33.03 million tons, recycled pulp is 54.74 million tons, and non-wood pulp consumption is 6.1 millions.

Pulp production

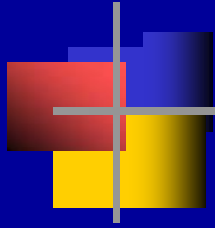
Grades	Year	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Total (10,000 ton)		6733	7318	7723	7867	7651	7906	7984	7925	7949	7201
: 1、Wood pulp		560	716	823	810	882	962	966	1005	1050	1147
2、Recycled Pulp		4997	5305	5660	5983	5940	6189	6338	6329	6302	5444
3、Non-wood pulp		1176	1297	1240	1074	829	755	680	591	597	610
	Reed	144	156	158	143	126	113	100	68	69	49
	bagasse	98	117	121	90	97	111	96	90	86	90
	Bamboo	161	194	192	175	137	154	143	157	165	191
	Wheat straw	676	719	660	592	401	336	303	244	246	250
	others	97	111	109	74	68	41	38	32	31	30

imported (2018)

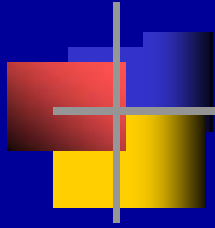
Grades (10,000 ton)	2017	2018	%
1、Pulp	2372	2479	4.51
2、Recycled paper	2572	1703	-33.79
3、Paper & paperboard	466	622	33.48
Newsprint	33	48	45.45
Printing & writing	63	85	34.92
Coated paper	45	49	8.89
Packaging & Wrapping	23	21	-8.70
linerboard	137	207	51.09
Boxboard	62	54	-12.90
Household & Sanitary	4	5	25.00
Medium	65	111	70.77
Specialty paper & paperboard	26	30	15.38
Others	8	12	50.00
4、Paper products	19	18	-5.26
Total	5429	4822	-11.18

Exported (2018)

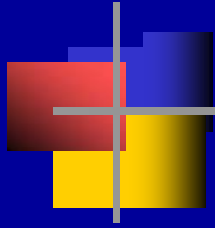
Grades (10,000 ton)	2017	2018	%
1、Pulp	9.87	9.99	1.22
2、Recycled paper	0.15	0.06	-60.00
3、Paper & paperboard	699	618	-11.59
Newsprint	1	1	0.00
Printing & writing	109	84	-22.94
Coated paper	176	150	-14.77
Packaging & Wrapping	11	10	-9.09
linerboard	12	7	-41.67
Boxboard	193	170	-11.92
Household & Sanitary	74	74	0.00
Medium	4	3	-25.00
Specialty paper & paperboard	82	89	8.54
Others	37	30	-18.92
4、Paper products	307	323	5.21
Total	1016.02	951.05	-6.39



Outlook

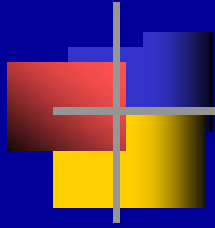


- Capita consumption level of paper and paperboard is an important sign to measure a country's economy and civilization. The consumption of paper is directly and indirectly affected by various fields of the whole society. At present, the developed countries in the world have a developed paper industries, which is listed as one of the pillar industries.
- Capita consumption is an important indicator to measure a country's comprehensive economic strength. In 2018, the capita consumption of paper and paperboard in the world is about 57 kg / a, while that in China is 78 kg / a.
- Although China's capita consumption is higher than the world average level, but it is lower than the capita consumption of 150-300 kg / year in developed countries, so there is still a huge space for development.



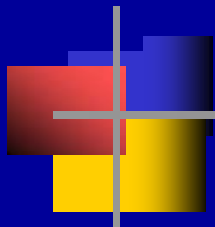
Main factors in long term :

- Recourses
- Environment
- Structure



Main factors in short time :

- Environmental protection policy
- Import policy on recycled paper
- Industrial transfer
- Development of electronic media
- Trade frictions



Thank you !

