China Papermaking Industry Development Research Report

Introduction

Based on many years research on China's papermaking industry, especially the overall review of China's papermaking industry in 2011, this report presents an in-depth investigation and research into China's papermaking industry especially domestic market in view of the changes of demand-supply relationship in the past years. Meanwhile, targeting the characteristics of papermaking industry and that of the upstream and downstream industries, this report also provides powerful data support and professional marketing orientation to papermaking enterprises and paper products enterprises from different perspectives, and also provides authoritative, adequate and reliable reference for the decision-making of enterprises in terms of development strategy, investment decision-making and enterprises management. Written with quantitative and qualitative research methods based on official statistics, this report tries to provide answers to the following problems which are the concerns of industry insiders with its research into the above aspects.

1. the changes of demand-supply relationship in China's papermaking industry in 2012;
2. the changes of supportability of China's papermaking raw material supply chain in 2012;
3. the competitiveness of China's papermaking industry in 2012;
4. the development strategies of China's leading papermaking industry in 2012;
5. the outlook of China's papermaking industry in future under the limit of policy environment, raw material support and market demand.

This research report is based on a great deal of material and information from the National Bureau of Statistics, the General Administration of Customs, the Ministry of Commerce,

the Development Research Center of the State Council, the State Forestry Administration, China Technical Association of Paper Industry, basic information from relevant newspapers and journals home and abroad, as well as a lot material published and provided by fruit juice research institutes, and will be able to serve as scientific reference for paper pulp and paper products enterprises, research institutions, and sales companies to have a precise understanding of the China's paper industry development, master market opportunities, make correct enterprises strategy as well as to clarify their development orientation.

Figures

Tables

Sample:

Chapter III Analysis of the Upstream Industries of China's Papermaking Industry （excerpts）

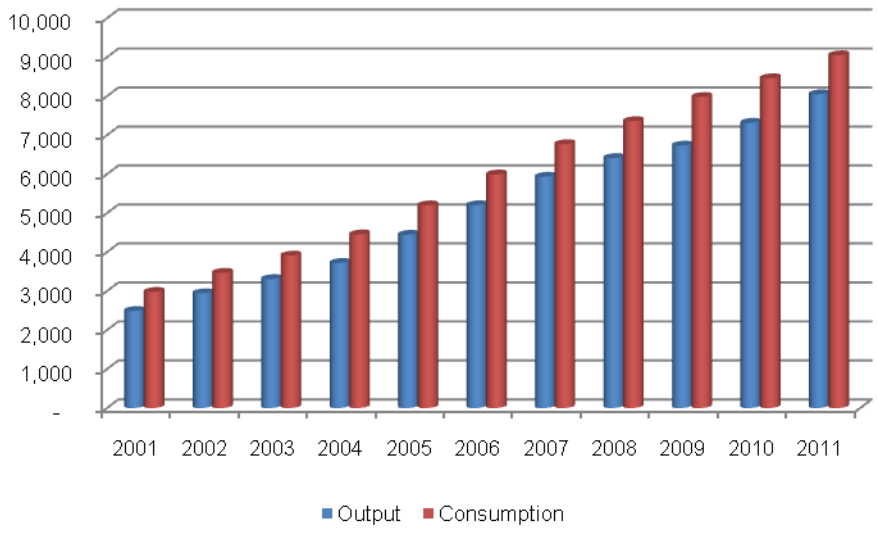
3.1 Analysis of China's Paper Pulp Market

3.1.1 China's Paper Pulp Output and Consumption

In recent years, the rapid expanding of China's papermaking capacity stimulated the drastic increase of paper pulp demand. Especially since 2002, the total output and consumption of paper pulp have both seen rapid growth.

Figure　China's Paper Pulp Output and Consumption

Unit:10,000tons



3.1.2 China's Paper Pulp Consumption Structure

In China's paper pulp consumption structure, the proportion of non-wood fiber has seen decrease while the proportion of wood fiber has maintained at a low level. Currently, in international paper pulp consumption, the proportion of wood pulp is about 63% on average, the proportion of waste pulp is about 34%, and the proportion of non-wood pulp is 3%. However, in China's paper pulp consumption, the proportion of wood fiber is about 22% while that of waste pulp is 63% and the proportion of non-wood pulp is about 15%. The comparison shows that the proportion of wood pulp in China's paper pulp consumption is much lower that of the international level, which means that the raw material structure in China's paper pulp is not reasonable as the proportion of wood pulp

is too low.

Figure　China's Paper Pulp Consumption by Type

Unit:10,000tons

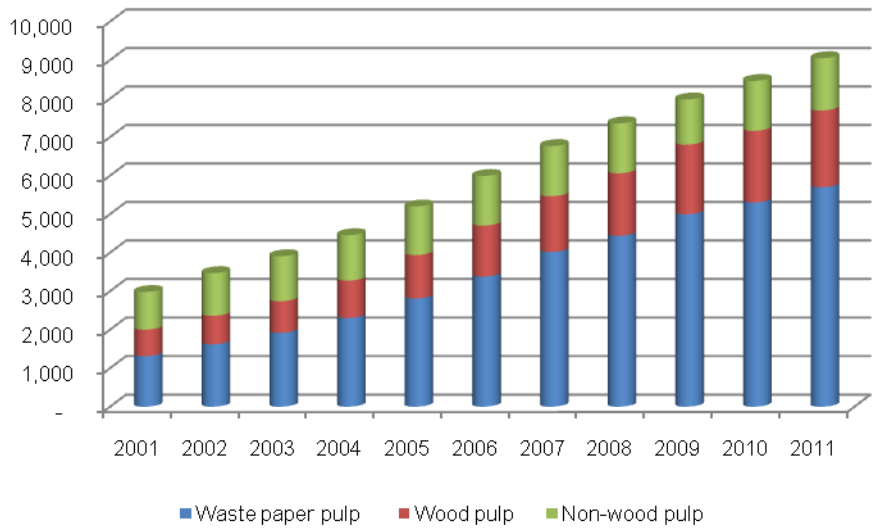
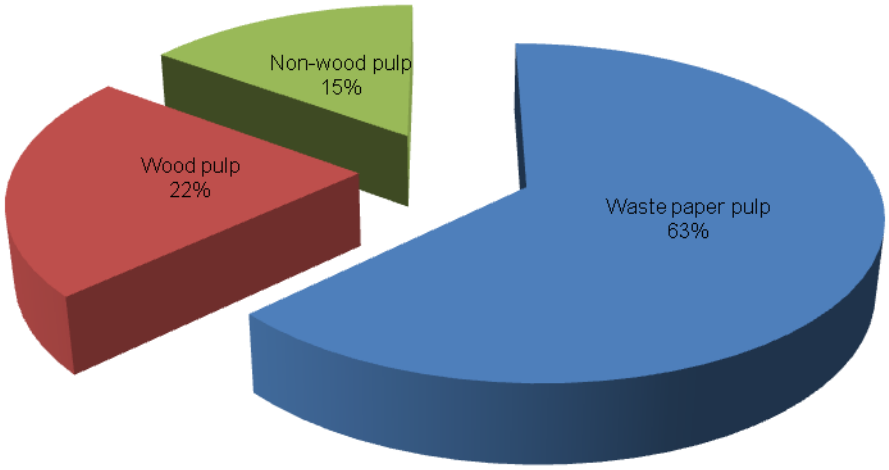


Figure　China's Paper Pulp Consumption Structure



3.1.3 China's Paper Pulp Self-Supply

The proportion of wood pulp in China's paper raw material supply is very low; besides, in the low supply of wood pulp, there is only a small part of domestic-produced wood pulp. In the last decade, over 60% of the wood pulp consumed by China's paper industry is imported while the proportion of domestic-produced wood pulp is near to 40% only in the past two years. In total, domestic-produced wood pulp accounts for only 8.4% of the total

paper pulp.

Table China's Wood Pulp Consumption in Paper Industry and Proportion of Self-Supply

Unit:10,000tons

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Consumption（a）	2,980	3,470	3,910	4,455	5,200	5,992	6,769	7,360	7,980	8,461	9,050
Wood pulp（b）	690	740	820	970	1,130	1,322	1,450	1,624	1,808	1,859	1,991
b/a(%)	23%	21%	21%	22%	22%	22%	21%	22%	23%	22%	22%
Import wood pulp（c）	490	526	603	732	759	796	845	952	1,257	1,151	1,445
c/b(%)	71%	71%	74%	75%	67%	60%	58%	59%	70%	62%	73%
c/a(%)	16%	15%	15%	16%	15%	13%	12%	13%	16%	14%	16%
Homebred wood pulp（d）	200	214	217	238	371	526	605	672	551	708	546
d/b(%)	29%	29%	26%	25%	33%	40%	42%	41%	30%	38%	27%
d/a(%)	7%	6%	6%	5%	7%	9%	9%	9%	7%	8%	6%