IARPMA

INDIAN AGRO & RECYCLED PAPER MILLS ASSOCIATION

- Nurturing Eco-friendly Paper Since 1987

IARPMA

Synonyms with

NON-WOOD

&

Eco-Friendly Paper
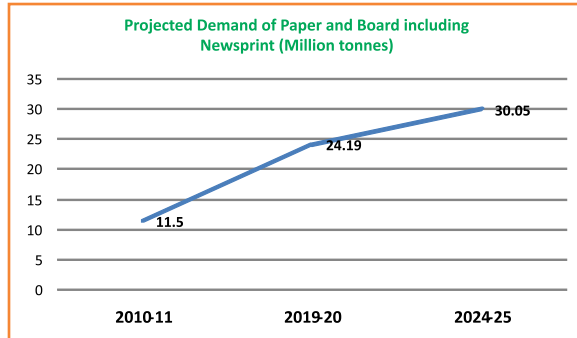
www.inpaper.com

www.iarpma.org

Indian Paper Industry – *An Outlook*

The Indian Paper Industry has traversed a long way since 1812, when the first paper mill in the country was commissioned in West Bengal in meeting the ever growing requirements of consumers within the country and abroad. Today India produces a wide range of paper and paper boards using a variety of raw materials. Indian Paper Industry, comprising of more than 779 paper units, is highly fragmented and dominated by small and medium scale units with capacity ranges from 20-50 metric tonnes to 3000 metric tones per day. With the globalization of Indian economy, foreign equity participation has become attractive. The industry is on the growth trajectory and is projected to produce 22 million tons in the year 2019-2020 and will reach 30 million tons by 2024-2025.
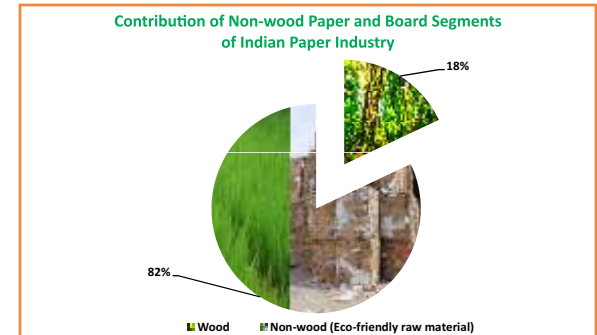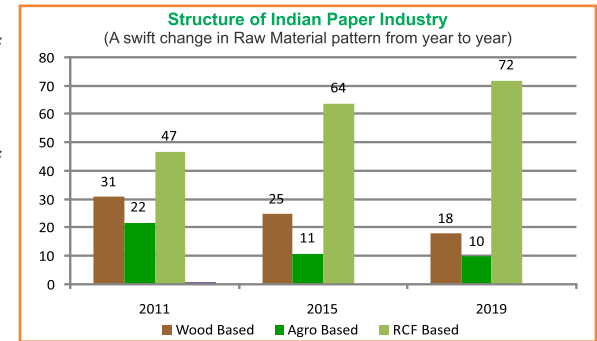
Structure of Indian Paper Industry
(A swift change in Raw Material pattern from year to year)

Wood Based | Agro Based | RCF Based

A Quick Overview of Indian Paper Industry

Projected Demand of Paper and Board including Newsprint (Million tonnes)

- 5th Largest in the world
- Total Number of Mills   –   779
- Mills in operation   –   545
- Total Installed Capacity   –   28 Million Tonnes (Approx with the new addition)
- Capacity in Operation   –   22.96 M.T. (Approx.)
- Overall consumption including Newsprint   –   24.19 M.T.

- ❖ Employment creator for 1.5 million directly and 4 million + indirectly.
- ❖ Contribute substantially to exchequer.
- ❖ Export is around 4% of the total turnover.
- ❖ Domestic Per capita consumption at 16.5 Kg.
- ❖ An increase in consumption by 1 Kg per capita will lead to an increase and demand of 1 million tones.
- ❖ Indian Paper Industry will grow at 6.5 - 7.0% per annum (CAGR).
- ❖ Demand for packaging, copies, tissue paper, writing and printing paper growing fast.
- ❖ Turnover is USD 9.0 Billion.

Contribution of Non-wood Paper and Board Segments of Indian Paper Industry

18%

82%

Wood | Non-wood (Eco-friendly raw material)

INDIAN AGRO & RECYCLED PAPER MILLS ASSOCIATON (IARPMA)

- A vibrant national body of Indian Paper Industry (NCRM)

History

The Indian Agro & Recycled Paper Mills Association popularly known as IARPMA (previously known as "Indian Agro Paper Mills Association"), is the apex body of Paper Mills based on Non-Conventional Raw materials viz Agricultural Residues like Rice Straw, Wheat Straw, Bagasse, Jute, Cotton Linter, Grasses and Wastepaper (Recycled Fibre) etc. and functions as a catalytic agent for the growth, promotion and development. The Association came in existence in 1987 at a historic meeting of the representatives of the Paper Mills based on agricultural residues and the organization as "Indian Agro Paper Mills Association" was born and later it is changed into **"Indian Agro & Recycled Paper Mills Association"** (IARPMA) by adopting the recycled paper segment under its folder. Thanks to the support and co-operation of our members, within a short span of time, the Association has been able to carve out a prominent place for the agro residue & recycle fibre based paper mills with in the country and in the International arena. Today the non-wood based segment of the industry contributes nearly 82% to the total production in the Country.

IARPMA Membership – *An Ambassador to Eco-friendly Paper Production*

IARPMA membership comprises of firms, companies, and other corporations engaged in the manufacturing of non-wood based Paper, Paper Board and allied products by the pulp made out of the Grass, Straw, Bagasse, Jute, Jute waste, Cotton Linters, Waste Paper etc. The formation of IARPMA has instilled confidence among the agro & recycled fibres based paper mills in the country and are striving hard to help the country to reduce dependence on scarce forest resources for paper making. The activities of the Association are also changing and broad basing in line with changing matrix of the industry. The doors of IARPMA are open to those who would like to be Ambassadors of this cause nationally and Internationally.

Horizon of Activities – *to make industry competent*

IARPMA, although represents non- wood sector of paper mills in the country , it always endeavours to bring all the segments of the Paper manufacturers as well as Machinery & Equipment manufacturers, chemical suppliers, service providers, consultants etc. under one umbrella and also to facilitate linkage within the supply - chain management. Its range of activities are:

Co-Ordination & Liaison

- ❖ Provides a common platform for dialogue between Government and Industry representatives at various forums.
- ❖ Interacts and maintains close link with Media, Opinion Makers, Industry Associations for Image building and better alignment.

- ❖ Highlights the problems of paper industry, suggests viable solutions and ensures active contributions in policy formulations.
- ❖ Facilitates smooth co-ordination, healthy interaction and exchange of information among members.
- ❖ Dissemination of information viz various directions, laws, rules and regulations to industry & represent the view point of the industry to Government after feeling the pulse of the industry.
- ❖ Represent the views of the industry on issues confronted and seek remedial measures.
- ❖ Help the Government to formulate policies conducive for the growth and development of the industry.
  .....and many more

Resource Centre and business promotion

- ❖ Serves as Resource center of the industry.
- ❖ Collects, collates, and disseminates information and periodical up-dation to the member mills.
- ❖ Organises study tour for the technical managers to technological advanced countries to equip them to meet the emerging challenges in the field of technologies and its operations.
- ❖ Close interaction with embassies and international bodies to ensure sustained growth of Indian Paper Industry and also to make them more competent internationally.
- ❖ Conducts studies on techno-commercial aspects of the industry.

IARPMA Publications *– means to bridge communication gap*

IARPMA brings out following publications:

- ❖ **INPAPER** INTERNATIONAL – A Quarterly Journal on World Pulp and Paper Industry.
- ❖ **PAPER INDIA** – A Bimonthly publication on Pulp, Paper, Printing and Allied Industry.
- ❖ **INPAPER DIRECTORY** on Indian Paper Manufacturers & Allied Industry – an encyclopedia of Indian Paper Industry.
- ❖ Industry Highlights & issues updated on **www.inpaper.com**
- ❖ **www.iarpma.org** – a source site for IARPMA activities.

IARPMA Technical Division *– to make industry technically vibrant*

- ❖ Undertakes pilot /demo-plant studies for new technologies with the financial assistance from various Government and non-government organizations.
- ❖ Handles projects related all areas of fibre line and paper making including energy and environment.
- ❖ Organizes Training programmes on the issues vital to the Indian Paper Industry.

IARPMA has a dedicated technical team of renowned technical experts in respective fields. IARPMA has undertaken number of technical projects independently with financial assistance from various ministries of GOI.

Exhibitions

PAPEREX – An International Trade Fair and Technical Conference on Pulp, Paper and Allied Industry organizes jointly with Hyve (previously known as International Trade & Exhibitions India Pvt. Ltd. (ITEI) every alternate year since 1993, with active National and International Participation. Today Paperex is world's largest show on Paper and Allied industry.

Paperex and Indian Paper Industry *– a saga of growth*

Since 1990, India has undergone continuous process of economic reforms aiming at liberalization, globalization and attracting investments. The process has made great impact on the whole economy including pulp and paper industry. The economic liberalization has brought new challenges and new opportunities. The Industry has been exposed to domestic and international competition, simultaneously the market has widened and technology acquisition, FDI etc. has been made simpler. Opening of economy has brought great opportunities for industry and firms which are innovative and competitive. The need for faster Modernization has been increasingly felt to keep pace with the developed world. However there exists huge gap of communication among technology seekers and technology providers. In this background, Paperex, with sponsorship from Indian Paper Industry has been planned to address the problem of the paper Industry by providing opportunities for:

- ❖ Vital exposure to the state-of-the-art technology in the industry even to shop floor supervisors.
- ❖ Business discussion for technological upgradation and modernization of existing plants in conducive atmosphere.
- ❖ Provide opportunities for overseas machinery suppliers to demonstrate the technological features of their machineries for quality and productivity improvements.
- ❖ Identify opportunities for setting up green field large size paper manufacturing, machinery, chemical and allied plants in India through joint ventures.
- ❖ Common platform for technology sellers and buyers and transfer of technology.
- ❖ Networking with the leaders of pulp and paper industry in the world.
- ❖ Bringing closer to all segments of pulp, paper and allied industry under one umbrella.
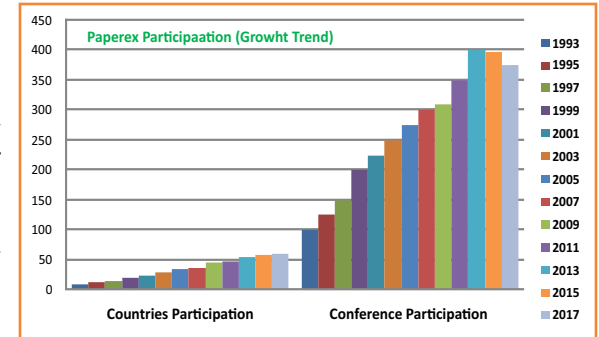
Concurrent International Conference focusing on global technological advancement, edge-breaking R&D achievements are organized bi-annually to provide a forum for interaction and sharing of knowledge by galaxy of International experts.

Glipses of Paperex

Paperex, organised bi-ennially has come all the way from the first international Trade Fair held in 1993. The Trade Fair is being organized by IARPMA and Hyve (earlier ITEI) and built up, step by step with the active support of the Indian Industry Associations of Paper and the Machinery Manufacturers. Paperex has been a great success in terms of Indian and Overseas Exhibitor participation, business visitors, conference delegates and business generation and has been adjudged as the best commodity fair and largest paper show in the world today.

The Exhibition areas of the Fair, the range of display and business visitors, have been steadily increasing. The Fair provided a common platform for the Pulp and Paper Industry in India, the Handmade Paper & Technology sector leading to substantial development of the industry.

Paperex Participaation (Growht Trend)

Countries Participation   Conference Participation

Legend: 1993, 1995, 1997, 1999, 2001, 2003, 2005, 2007, 2009, 2011, 2013, 2015, 2017

To highlight the importance of state of the art technologies at the door step of paper mills located in remote areas of the country, now Paperex is organising at regional level called Paperex South India which has grown today as an international event with largest participation from all over the world. The conference and Exhibition of Paperex aim to provide opportunity to companies to maximize the business collaboration regionally and also showcase their strength on technology, services etc. to the fraternity of the paper and allied industries.

IARPMA *– the Road Ahead*

IARPMA has set its Agenda for providing meaningful and effective services in line with changing needs of the Indian Paper Industry. IARPMA envisions to:

- ❖ Organize **Regional Paper Exhibitions and Conferences** of International level, in various part of the country, to meet regional aspirations and also to provide opportunities to shop floor personnel in far flung areas to have exposure to the latest technological advancement.
- ❖ Add New Features on Biotechnology, investor outlook, Management, CDM Technology, Research & Development etc., in its publications, focus coverage on Industry growth and new inventions in Pulp and Paper Industry.
- ❖ Organize focused training programe and workshops for the shop-floor personnel of mills.
- ❖ Create awareness camp for collection and segregation of wastepaper at household and school level.
- ❖ Organize workshops for creating awareness on environment and pollution prevention in pulp and paper industry.
- ❖ Develop a Resource centre and function as a store house of information.
  ....and many more to make industry operations fruitful and purposeful.

INDIAN AGRO & RECYCLED PAPER MILLS ASSOCIATION