

Office Paper

Industry Analysis Report

2013.07

Made-in-China.com



Produced by IAR Team
Focus Technology Co., Ltd.

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1. Industry Overview

National Bureau of Statistics data show that China paper & paperboard production was 10.1 million tons in May 2013, decrease by 1.1% compared to the last year. January-May cumulative production of 48.7 million tons, with an increase of 0.5%. In May 2013, the rate of increase of industrial paper industry was 7.7% From January to May in 2013, China's paper and paper products industry cumulative growth rate of 8.0%. From January to May in 2013, China's total production of newspaper is approximate to 1.62 million tons, decreased by 2.8% compared to last year. In May, China's newspaper production was 31.7 ten thousand tons, decreased by 2.8%.

- 2013 January-March National Paper Industry Statistics:

Product Name	Unit	This Month	Accumulation (Jan.-Mar.)	Month-on-Month	Month-on-Month Accumulation
Mechanism paper and paperboard (excluding purchased paper processing paper)	Ton	0,832,100.85	8,551,207.98	-1.33%	0.80%
Newsprint	Ton	364,787.48	989,815.13	0.75%	-3.36%
Paper products	Ton	4,285,604.26	11,337,374.42	9.77%	13.74%

Note:

1 Source: National Bureau of Statistics.

2 Statistical ranges: scale (ie, the main business income of 20 million yuan and above) industrial corporations

2. 2013 January-April China Office Paper Industry Export Enterprises Distribution

2.1. 2013 January-April China Replication / Self-copy Paper (in rolls or sheets) and Other Copying or Transfer Papers (HS: 4809)

- Export enterprises distribution (by sort export)

Province	Total export value from January to April (Ten thousand USD)	Accounting Proportion
Jiangsu Province	2,803	42.00%
Shandong Province	2,097	31.41%
Henan Province	1,292	19.35%
Guangdong Province	273	4.09%
Fujian Province	87	1.30%

According to the export data from January to April 2013, Chinese main export source area of replication / self-copy paper (in rolls or sheets) and other copying or transfer papers focus on Jiangsu, Shandong and Henan provinces and these three provinces exports accounted for over ninety percent of China's total exports, the export area is highly concentrated. Jiangsu Province, which exports accounted for 42% of China's total exports.

2.2. From January-April 2013 China Rolls or Rectangular Sheets Coated with Kaolin or Other Inorganic Substances Paper (Board) (HS: 4810) Export Enterprises Distribution (sorted by Exports)

Province	Total export value from January to April (Ten thousand USD)	Accounting Proportion
Jiangsu Province	30,319	38.90%
Zhejiang Province	17,570	22.55%
Shandong Province	15,068	19.33%
Hainan Province	9,044	11.60%
Guangdong Province	2,913	3.74%

According to the export data from January to April 2013, Chinese main export source area of rolls or rectangular sheets coated with kaolin or other inorganic substances paper (board) focus on Jiangsu, Zhejiang and Shandong provinces. Jiangsu Province, exports accounted for 38.9% of China's total exports. Jiangsu, Zhejiang, Shandong and Hainan provinces these four area exports accounted for 90 percent of total exports, export goods are more concentrated.

2.3. From January-April 2013, Chinese Rolls or Rectangular Sheets Coated / Impregnated / Printing and Other Processing of Paper and Similar Products (HS: 4811) Export Enterprises Distribution (sorted by Exports)

Province	Total export value from January to April(Ten thousand USD)	Accounting Proportion
Guangdong Province	8,512	24.44%
Zhejiang Province	8,130	23.35%
Jiangsu Province	7,523	21.60%
Shanghai	4,252	12.21%
Shandong Province	1,598	4.59%

According to the export data from January to April 2013, Chinese main export source area of rolls or rectangular sheets coated / impregnated / printing and other processing of paper and similar products focus on Guangdong, Zhejiang, Jiangsu province. Guangdong province exports account for 24.4 percent of China total export value. The export gap among Guangdong, Zhejiang and Jiangsu province is small.

2.4. From January to April in China 2013, Chinese Carbon and Other Copying or Transfer Papers (Excluding Paper of Heading 4809), Duplicator Stencils and Offset Plates of Paper (HS: 4816) Export Enterprises (sorted by Exports)

Province	Total export value from January to April (Ten thousand USD)	Accounting Proportion
Jiangsu Province	1,245	51.17%
Guangdong Province	567	23.33%
Zhejiang Province	143	5.86%
Henan Province	134	5.49%
Shanghai	130	5.34%

According to the export data from January to April 2013, Chinese main export source area of copy paper and other copying or transfer papers (excluding paper of heading 4809), duplicator stencils and offset plates of paper focus on Jiangsu Province, Guangdong Province and Zhejiang Province. Jiangsu Province exports accounted for 51.17 percent of total exports.

2.5. From January-April 2013 China Paper (board) Made Envelopes, Cards, etc.; Paper (Board) System Box / Bag / Clip, Containing an Assortment of Paper Stationery (HS: 4817) Export Enterprises Distribution (sorted by Exports)

Province	Total export value from January to April (Ten thousand USD)	Accounting Proportion
Guangdong Province	1,746	42.33%
Zhejiang Province	767	18.59%
Shanghai	499	12.08%
Shandong Province	283	6.85%
Jiangsu Province	219	5.32%

According to the export data from January to April 2013, China main export source area of paper (board) made envelopes, cards, etc.; paper (board) system box / bag / clip, containing an assortment of paper stationery focus on Guangdong province ,Zhejiang Province and Shanghai. Guangdong province accounted for 42.33 percent of total exports.

2.6. 2013 January-April China Articles of Paper; Paper Sample Books and Book Covers (HS: 4820) Export Enterprises Distribution (sorted by Exports)

Province	Total export value from January to April (Ten thousand USD)	Accounting Proportion
Guangdong Province	13,780	34.96%
Zhejiang Province	13,068	33.15%
Jiangsu Province	3,071	7.79%
Shanghai	2,142	5.43%
Shandong Province	1,885	4.78%

According to the export data from January to April 2013, China main export source area of articles, of paper; paper sample books and book covers focus on Guangdong province, Zhejiang province and Jiangsu province. Guangdong province exports account for 34.96 percent of total exports.

2.7. 2013 January-April China Paper or Paperboard Labels of All Kinds, Whether or Not Printed (HS: 4821) Export Enterprise Distribution (Sorted by Exports)

Province	Total export value from January to April (Ten thousand USD)	Accounting Proportion
Guangdong Province	10,795	59.51%
Zhejiang Province	2,437	13.43%
Shanghai	1,874	10.33%
Shandong Province	846	4.66%
Jiangsu Province	731	4.03%

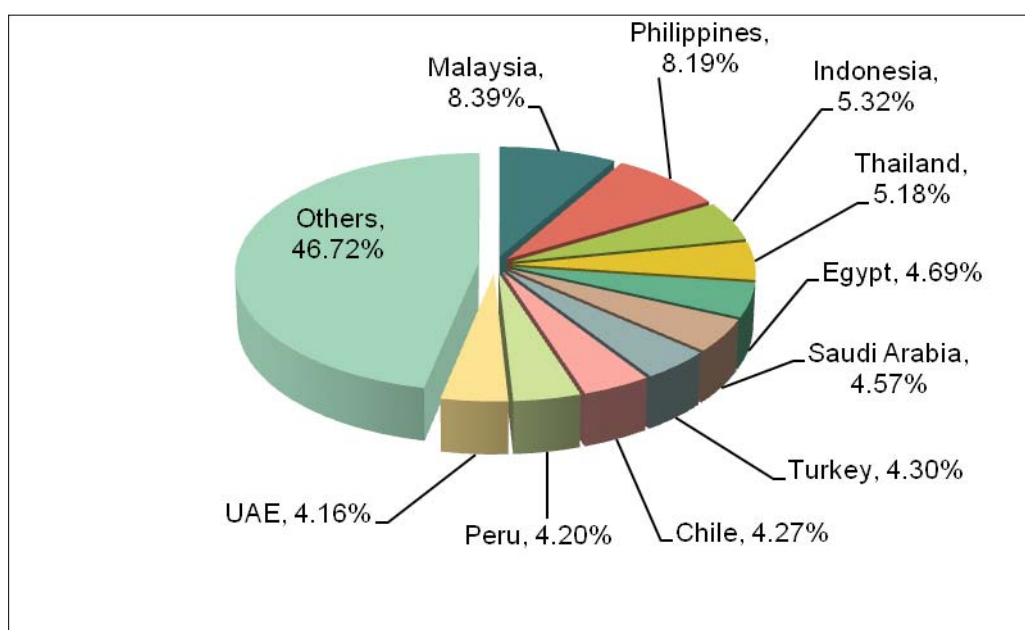
According to the export data from January to April 2013, China main export source area of our paper or paperboard labels of all kinds, whether or not printed focus on Guangdong Province, Zhejiang Province and Shanghai. Guangdong province accounted for approximate 60% of total exports.

Source: Customs Information Website

3. 2013 January-April China Office Paper Industry Exports Analysis

3.1. 2013 January-April China Replication / Self-copy Paper (in Rolls or Sheets) and Other Copying or Transfer Papers (HS: 4809) Export Value and The Main Exporting Country / Region (Sorted by Exports)

No.	Country/Region	January-April accumulation		Accumulated Sum compared last year	
		Wight (KG)	Sum (USD)	Quantity	Sum
1	Malaysia	3,546,954	5,596,979	21.6%	24.4%
2	Philippines	4,003,455	5,466,979	56.0%	49.7%
3	Indonesia	2,193,740	3,552,475	34.8%	39.1%
4	Thailand	2,253,001	3,459,193	1.8%	0.2%
5	Egypt	2,437,648	3,131,137	20.8%	17.7%
6	Saudi Arabia	1,911,712	3,051,558	-23.7%	-20.3%
7	Turkey	1,784,376	2,872,101	201.8%	226.2%
8	Chile	1,800,393	2,847,215	-9.2%	-6.5%
9	Peru	1,972,386	2,802,022	-1.1%	-0.5%
10	UAE	1,724,692	2,777,969	21.8%	23.8%



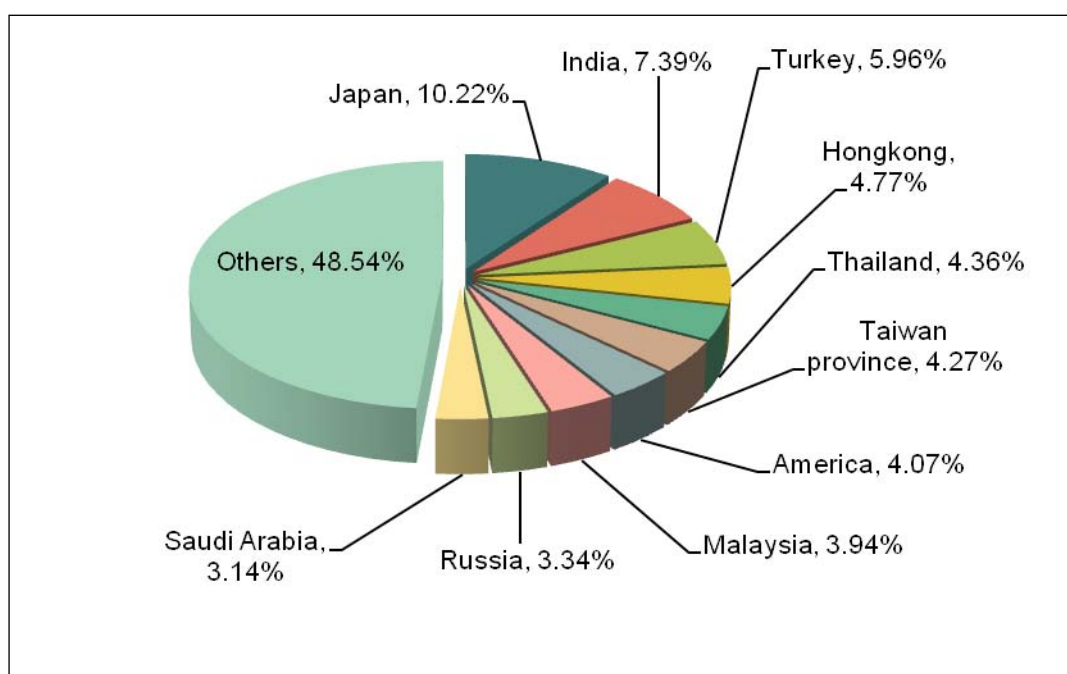
2013 January April Chinese replication (in rolls or sheets) / self-copy paper and other copying or transfer papers cumulative exports about 0.67 million USD, increase by 14.4 percent which growth compared to the same period last year.

Major exporting countries / regions are Malaysia, Philippines, Indonesia, Thailand, Egypt, Saudi Arabia, Turkey, Chile, Peru and the United Arab Emirates. Malaysia is the targeted-country to export replication (in rolls or sheets) / self-copy paper and other copying or transfer papers for China, Which export accounted for 8.39% of total export. China mainly export replication (in rolls

or sheets) / self-copy paper and other copying or transfer papers concentrate on ASEAN countries, Africa, the Middle East and Latin America and other underdeveloped regions, the export market is relative dispersed. The export has increased to 226.2 % (China export Turkey) in the top 10 exporting countries/ region. The growth is the fastest.

3.2. 2013 January-April China Rolls or Rectangular Sheets Coated With Kaolin or Other Inorganic Substances Paper (Board) (HS: 4810) Export Value and the Main Exporting Country / Region (Sorted by Exports)

No.	Country/Region	January-April accumulation		Accumulated Sum compared last year	
		Wight (KG)	Sum (USD)	Quantity	Sum
1	Japan	89,168,714	79,655,770	-55.5%	-58.1%
2	India	67,136,605	57,555,641	26.6%	21.6%
3	Turkey	55,165,020	46,474,051	20.0%	13.4%
4	Hongkong	42,392,701	37,147,475	-26.0%	-27.2%
5	Thailand	37,705,836	33,969,294	24.9%	16.6%
6	Taiwan province	38,304,089	33,247,068	31.9%	19.9%
7	America	34,410,145	31,750,913	-6.7%	-6.6%
8	Malaysia	33,768,743	30,731,674	11.7%	3.0%
9	Russia	29,962,428	26,049,629	7.6%	3.7%
10	Saudi Arabia	27,508,576	24,492,096	33.2%	37.2%

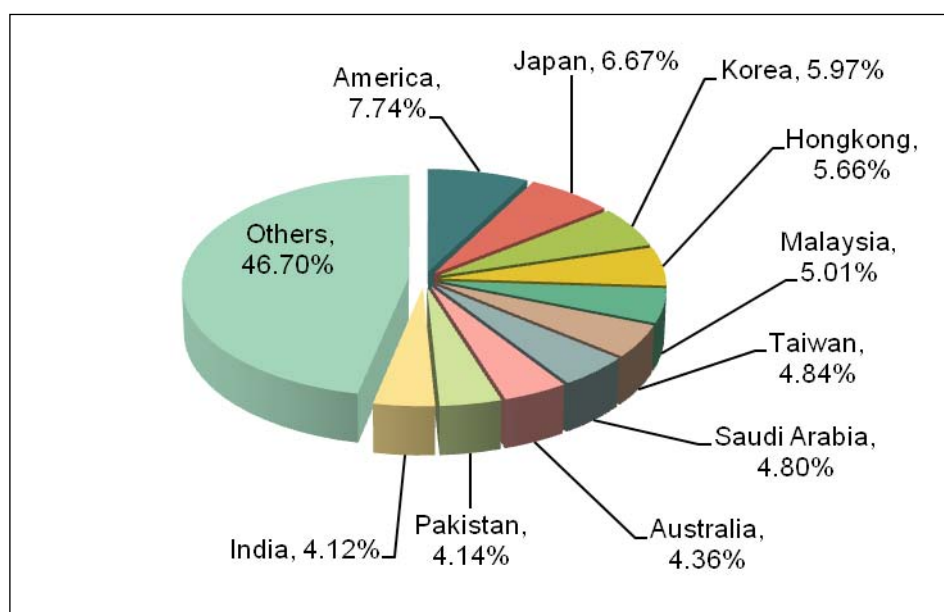


According to the export data from January to April 2013, China export of rolls or rectangular sheets coated with kaolin or other inorganic substances paper (board) approach cumulative sum about \$ 779 million, decreased by 6.6%. Major exporting countries / regions in Japan, India, Turkey, Hong Kong, Thailand, Taiwan, United States, Malaysia, the Russian Federation and Saudi Arabia. Japan

is Chinese targeted export country of in rolls or rectangular sheets coated with kaolin or other inorganic substances paper (board), which export has accounted for 10.22 % of total export. 2013 January~ April export sum of in rolls or rectangular sheets coated with kaolin or other inorganic substances paper (board) has decreased by 58.1% compared the same period in 2012 far higher than industry's overall decline of 6.6%.

3.3. 2013 January-April China Rolls or Rectangular Sheets Coated / Impregnated / Printing and Other Processing of Paper and Similar Products (HS: 4811) Export Value and The Main Exporting Country / Region (Sorted by Exports)

No.	Country/Region	January-April accumulation		Accumulated Sum compared last year	
		Weigh (KG)	Sum (USD)	Quantity	Sum
1	America	6,596,033	26,938,533	42.5%	125.8%
2	Japan	7,718,251	23,239,172	66.4%	50.2%
3	Korea	8,115,088	20,773,223	1.6%	-2.6%
4	Hongkong	6,942,274	19,716,675	6.3%	30.1%
5	Malaysia	6,438,455	17,444,903	49.1%	107.8%
6	Taiwan	8,530,738	16,860,704	43.3%	27.2%
7	Saudi Arabia	8,844,453	16,706,214	32.2%	39.0%
8	Australia	4,567,221	15,182,141	11.7%	26.6%
9	Pakistan	6,958,681	14,402,863	10.5%	15.9%
10	India	7,673,866	14,347,950	16.1%	23.2%

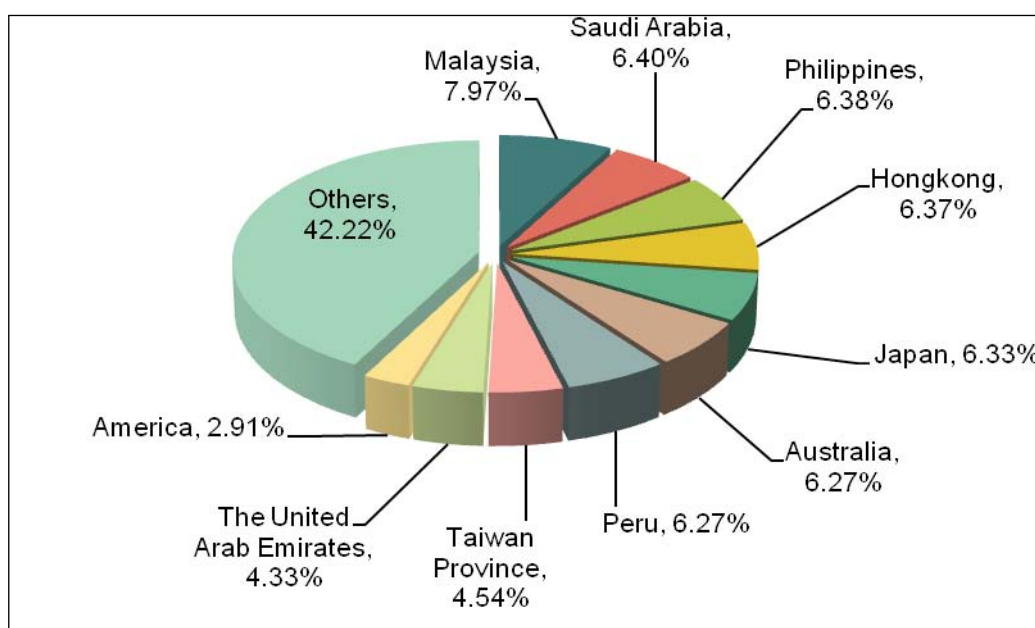


From January to April 2013, China cumulative export of in rolls or rectangular sheets coated / impregnated / printing and other processing of paper approach \$ 348 million, which increased by 34.6% compared the same period last year. Major exporting countries / regions in United States,

Japan, Korea, Hongkong, Malaysia, Taiwan, Saudi Arabia, Australia, Pakistan and India. America is the major export market of sheets (rolls or rectangular) coated / impregnated / printing and other processing of paper and similar products for China and accounted for 7.74% of total exports. In general the industry export market is scattered. The first four months in 2013, China's export to Malaysia win a fast growing with an increase of 107.8% in the top 10 export markets.

3.4. January-April in 2013, China Carbon and Other Copying or Transfer Papers (Excluding Paper of Heading 4809), Duplicator Stencils and Offset Plates of Paper (HS: 4816) Export Value and the Main Exporting Country / Region (Sorted by Exports)

No.	Country/Region	January-April accumulation		Accumulated Sum compared last year	
		Weigh (KG)	Sum (USD)	Quantity	Sum
1	Malaysia	632,505	1,937,876	50.0%	188.4%
2	Saudi Arabia	943,483	1,557,411	-9.3%	-13.6%
3	Philippines	745,699	1,551,400	16.6%	29.7%
4	Hongkong	1,178,657	1,550,257	-11.8%	76.8%
5	Japan	689,653	1,540,848	-2.8%	-7.9%
6	Australia	702,924	1,525,557	5.8%	-1.8%
7	Peru	885,044	1,524,046	100.3%	97.9%
8	Taiwan Province	616,053	1,105,339	-14.7%	-14.9%
9	The United Arab Emirates	566,873	1,052,506	35.1%	43.6%
10	America	162,198	707,580	42.0%	-5.8%



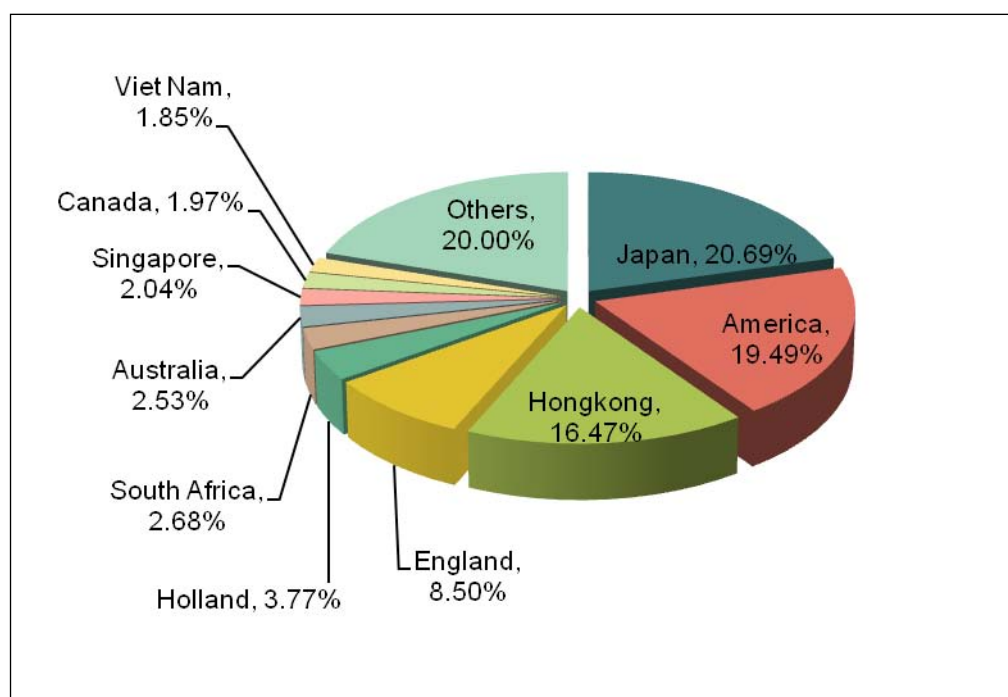
January to April in 2013, Chinese carbon paper and other copying or transfer papers (excluding paper of heading 4809), duplicator stencils and offset plates of paper total exports is approached

024 million with an increase of 28.5%. Major exporting countries / regions in Malaysia, Saudi Arabia, the Philippines, Hong Kong, Japan, Australia, Peru, Taiwan, the United Arab Emirates and the United States. In the first four months of 2013, Chinese export to Malaysia has grown by 188.4 %. Malaysia has become Chinese largest export market of carbon paper and copy paper.

In 2013 January-April, Chinese export to Malaysia of carbon and other copying or transfer papers (excluding paper of heading 4809), duplicator stencils and offset plates accounted for 7.97 percent of total exports. Copy paper and other copying or transfer papers (excluding paper of heading 4809), duplicator stencils and offset plates of paper export market are scattered.

3.5. 2013 January-April, China Paper (Board) Made Envelopes, Cards, Etc.; Paper (Board) System Box / Bag / Clip, Containing an Assortment of Paper Stationery (HS: 4817) Export Value and the Main Exporting Country / Region (Sorted by Exports)

No.	Country/Region	January-April accumulation		Accumulated Sum compared last year	
		Weigh (KG)	Sum (USD)	Quantity	Sum
1	Japan	2,953,422	8,535,503	8.0%	-0.4%
2	America	2,086,039	8,042,882	-13.0%	1.3%
3	Hongkong	2,949,139	6,793,800	-7.2%	18.4%
4	England	1,115,606	3,507,275	10.3%	37.8%
5	Holland	581,148	1,557,159	680.8%	293.7%
6	South Africa	69,708	1,106,091	27.5%	568.4%
7	Australia	284,970	1,042,907	-12.1%	6.2%
8	Singapore	240,684	843,299	5.9%	64.1%
9	Canada	211,639	813,620	-3.6%	-2.7%
10	Viet Nam	84,804	762,817	7.9%	179.9%

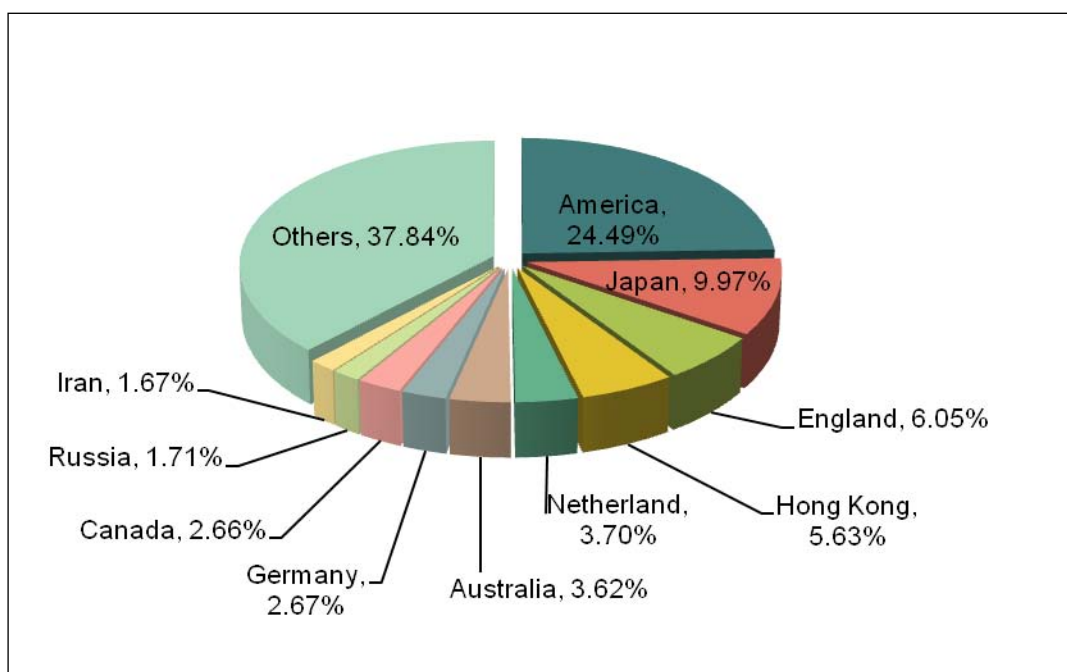


2013 January to April, Chinese export of paper (board) made envelopes, cards, etc.; Paper (board) system box / bag / clip, containing an assortment of paper stationery is approached \$ 041 million, with an increase of 17.9%. Major exporting countries / regions are Japan, the United States, Hong Kong, the United Kingdom, the Netherlands, South Africa, Australia, Singapore, Canada and Vietnam. Japan, the United States and Hong Kong are Chinese major export market of paper (board) envelopes, cards, etc.; paper (board) system box / bag / clip, containing an assortment of paper stationery and the export accounted for total exports of 20.69%, 19.49% and 16.47%

respectively, Which accounted for 56.65% of total exports all together. In the top 10 export market, Chinese export value to Netherland, South Africa and Viet Nam has increased 293.7%, 568.4% and 179.9% respectively, Which all has increased by 100% compare the same period with last year.

3.6. 2013 January-April China and Similar Articles of Paper; Paper Sample Books and Book Covers (HS: 4820) Export Value and the Main Exporting Country / Region (Sorted by Exports)

No.	Country/Region	January-April accumulation		Accumulated Sum compared last year	
		Quantity	Sum (USD)	Quantity	Sum (USD)
1	America	32,960,914	96,521,135	-9.7%	-7.9%
2	Japan	9,196,993	39,315,623	5.2%	-4.4%
3	England	9,527,758	23,845,459	3.3%	1.6%
4	Hong Kong	10,799,047	22,190,727	-27.3%	-15.7%
5	Netherland	5,414,807	14,570,311	3.6%	-3.2%
6	Australia	5,893,936	14,255,648	6.4%	12.0%
7	Germany	3,522,150	10,520,728	-12.3%	-0.7%
8	Canada	2,957,221	10,498,091	-4.1%	-21.1%
9	Russia	2,334,965	6,737,665	44.9%	64.6%
10	Iran	3,095,710	6,588,592	85.4%	75.7%

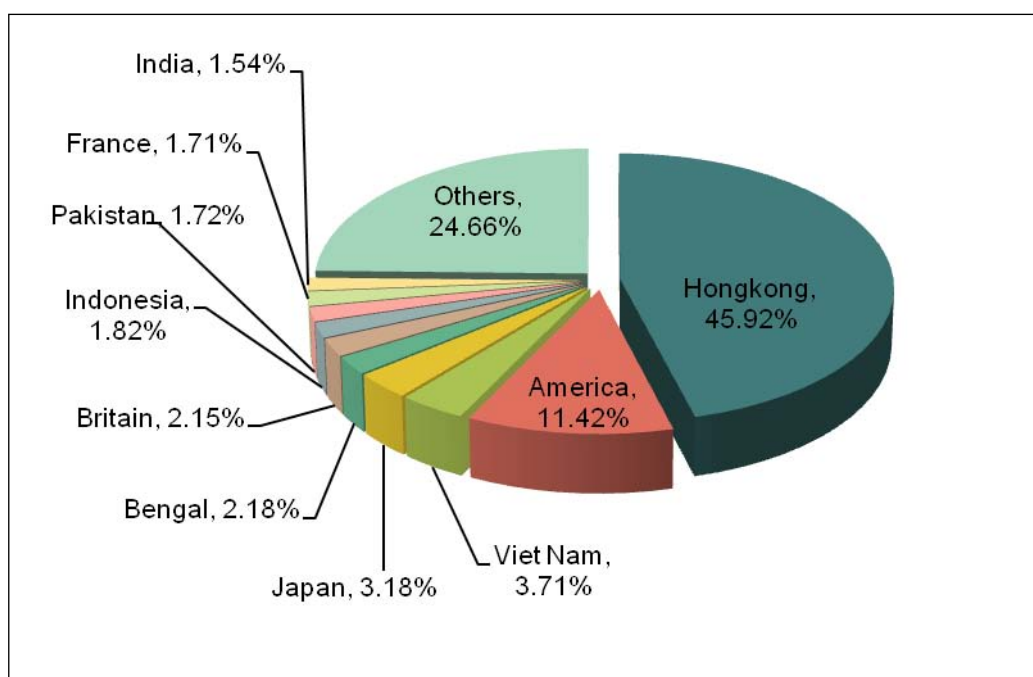


From 2013 January to April, China book, similar papers, paper sample books and book covers cumulative exports about \$ 394 million, essentially flat with last year. Major exporting countries / regions are the United States, Japan, Britain, Hong Kong, Netherlands, Australia, Germany, Canada, the Russian Federation and Iran. The United States is the major export market of the

book, similar papers, paper sample books and book covers to China. For U.S. exports of such products accounted for approximately 24.49% of total exports.

3.7. 2013 January-April China Paper or Paperboard Labels of All Kinds, Whether or Not Printed (HS: 4821) Export Value and The Main Exporting Country / Region (Sorted by Exports)

No,	Country/ Region	January-April accumulation		Accumulated Sum compared last year	
		Quantity	Sum (USD)	Quantity	Sum (USD)
1	Hongkong	12,869,586	83,300,462	-6.2%	17.4%
2	America	5,005,345	20,722,276	-4.0%	-1.8%
3	Viet Nam	746,990	6,728,804	15.7%	36.9%
4	Japan	588,535	5,766,645	9.5%	5.0%
5	Bengal	1,569,160	3,959,206	63.3%	49.2%
6	Britain	737,089	3,897,984	0.4%	24.9%
7	Indonesia	926,128	3,294,254	-47.3%	-21.3%
8	Pakistan	1,711,874	3,113,444	281.8%	223.9%
9	France	351,334	3,100,878	6.0%	15.3%
10	India	1,074,641	2,799,708	-24.4%	-27.5%



2013 January-April, China all kinds labels of paper or paperboard, whether or not printed cumulative exports about 181 million USD, with an increase of 11.7% compared the same period last year. Major exporting countries / regions are Hong Kong, the United States, Vietnam, Japan, Bangladesh, Britain, Indonesia, Pakistan, France and India. Hong Kong is the major export market of paper and similar articles; paper sample books and book covers to China. Hong Kong's exports of such products accounted for approximately 45.92% of total exports. Pakistan is the fastest

export growing country in Chinese Top 10 export markets, with a increase of 223.9% compared the same period last year.

Source: Customs Information Network

4. 2013 Jan-Mar, Global Office Paper Industry Demanding Situation

4.1. 2013 January to March, the Mainly Import Countries for The Sheets (In Rolls) Replication / Self-copy Paper and Other Copying or Transfer Papers (Hs: 4809) Main Demand for The Country (According to the Amount of Imports Sort)

Import Countries/Regions	Import Amount (thousand dollars)	Compared to same period last year
Turkey	13,876	2.30%
France	12,673	-11.78%
Poland	10,406	-0.30%
British	10,352	36.61%
Italy	8,659	-1.88%

2013 January to March, Turkey import replication / self-copy paper (in rolls or sheets) and other copying or transfer papers amounted to \$ 14 million, which is the world's largest import country for the replication / self-copy paper (in rolls or sheets) and other copying or transfer paper importer.

4.2. 2013 January-March, the Major Import Countries for Rolls or Rectangular Sheets Coated with Kaolin or Other Inorganic Substances Paper (Board) (HS: 4810) (Sorted by Imports)

Import Countries/Regions	Import Amount (thousand USD)	Compare to the same period last year
Germany	871,994	-3.47%
America	594,098	0.21%
France	471,153	-8.09%
Britain	443,483	-6.94%
China	291,143	-5.14%

2013 January-March, Germany imported the rolls or rectangular sheets coated with kaolin or other inorganic substances paper (board) and the imports amounted to \$ 872 million, which is the world's largest import country for the rolls or rectangular sheets coated with kaolin or other inorganic substances paper (board). From January to March 2013, China's imports of rolls or rectangular sheets coated with kaolin or other inorganic substances paper (board) amounted \$ 291 million, which is ranked fifth.

4.3. 2013 January-March, the Major Import Countries for The Rolls or Rectangular Sheets Coated / Impregnated / Printing and Other Processing of Paper and Similar Products (HS: 4811) (Sorted by Imports)

Import Countries/Regions	Import Amount (thousand USD)	Compare to the same period last year
America	356,427	1.52%
Germany	275,284	-0.67%
France	232,391	-6.53%
Britain	205,241	-2.46%
Russia	201,084	11.21%

2013 January-March, America imports of rolls or rectangular sheets coated / impregnated / printing and other processing of paper and similar products amounted to \$ 356 million, which is the world's leading import country for the rolls or rectangular sheets coated / impregnation / printing and other processing of paper.

4.4. 2012 the Major Import Countries for Copy Paper and Other Copying or Transfer Papers (Excluding Paper of Heading 4809), Duplicator Stencils and Offset Plates of Paper (HS: 4816)(Sorted by Imports)

Import Countries/Regions	Import Amount (thousand USD)	Compare to the same period last year
Korea	102,080	-3.28%
Canada	49,042	-2.09%
México	43,503	-3.04%
Singapore	24,387	9.65%
Italy	23,158	-14.49%

2013 January to March, Korea is the major import country for carbon and other copying or transfer papers (excluding paper of heading 4809), duplicator stencils and offset plates of paper and the imports amounted to \$ 102 million.

4.5. 2013 January to March , the Major Countries for the Paper (Board) ,Envelopes, Cards, Paper (Board) System Box / Bag / Clip, Containing an Assortment of Paper Stationery (HS: 4817) Main Demand for the Country (Sorted by Imports)

Import Countries/Regions	Import Amount (thousand USD)	Compare to the same period last year
America	34,515	10.26%
Britain	28,636	5.65%
France	16,771	-4.82%
Germany	13,045	-10.28%
Canada	11,762	-16.69%

2013 January-March, America imports of the paper (board) ,envelopes, cards, paper (board) system box / bag / clip, containing an assortment amounted to \$ 35 million, which is the world's largest import country of paper (board) system envelopes, cards, etc.; paper (board) system box / bag / clip, containing an assortment

4.6. 2013 January to March of This and Similar Articles, of Paper; Paper Sample Books and Book Covers (HS: 4820) Main Demand for the Country (Sorted by Imports)

Import Countries/Regions	Import Amount (thousand USD)	Compare to the same period last year
America	181,399	-4.31%
Britain	60,669	-1.48%
Germany	58,281	0.48%
Japan	49,299	-10.81%
France	41,260	-1.02%

2013 January to March, America is the world's largest import country for the paper and similar articles of paper; paper sample book and book, which imports amounted to \$ 181 million.

4.7. 2013 January to March, the Main Import Countries for All Kinds of Paper or Paperboard Labels Whether or Not Printed (HS: 4821) (Sorted by Imports).

Import Countries/Regions	Import Countries/Regions	Import Amount (thousand USD)
Mexico	81,383	32.51%
America	77,987	2.22%
France	70,730	-8.50%
China	62,984	-5.89%
Germany	60,909	-0.83%

2013 January to March, Mexico the major import country for all kinds of label of paper or

paperboard whether or not printed primary demand for the country, while imports amounted to \$ 81 million.

Source: UN Comtrade

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Thanks for reading the report, if you have any questions,opinions or advices, please contact us.

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