India & Indonesia paper markets

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International trade in recovered paper

Total 50 million tonnes
Consumption of recovered paper by region

- Rest of Asia
- North America
- Western Europe
- Japan
- Eastern Europe
- China
- Latin America
- Rest of the World

Forecast

Million tons

Years:
- 1990
- 1995
- 2000
- 2005
- 2010
- 2015
- 2020
- 2025
Consumption of recovered paper by grade

<table>
<thead>
<tr>
<th>Grade</th>
<th>2007</th>
<th>2025</th>
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<tbody>
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<td>Newsprint</td>
<td>2007</td>
<td>2025</td>
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<td>Printings &amp; Writings</td>
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<td>Tissue</td>
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<td>Cartonboard</td>
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<td>Other</td>
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Million tons

- Mixed
- OCC
- News&PAMs
- High grades
India - Structure

- Population
  1,177M

- Paper Cons
  10.2MT

- Recovery rate
  30%
India - Fibre Demand

- Domestic RCP: 34%
- Virgin wood pulp: 21%
- Non-wood pulp: 24%
- Imported RCP: 21%

Imported pulp by region:
- US: 34%
- Other Europe: 18%
- Other: 18%
- UK: 17%
- Sri Lanka: 5%
- UAE: 8%

Slices not specified are combined under "Other".
India - Outlook

![Graph showing trends in wood pulp, non-wood pulp, domestically collected RCP, and imported RCP from 1980 to 2020.](image)
Indonesia

- Population 240M
- Paper Cons 6.0MT
- Recovery rate 50%
Indonesia - Fibre Demand

- Domestic RCP: 32%
- Virgin wood pulp: 45%
- Non-wood pulp: 1%
- Imported RCP: 22%

By destination:
- Other Europe: 39%
- UK: 23%
- US: 14%
- Singapore: 13%
- Australia: 7%
- Other: 4%
Indonesia - Outlook

- Wood pulp
- Non-wood pulp
- Domestically collected RCP
- Imported RCP
Key conclusion

- Continued demand from India and Indonesia for recovered paper, but...
  ....the growth potential in both markets is expected to be satisfied locally

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