



# Sourcing of China's Paper Fiber Supply

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*April 2, 2008*

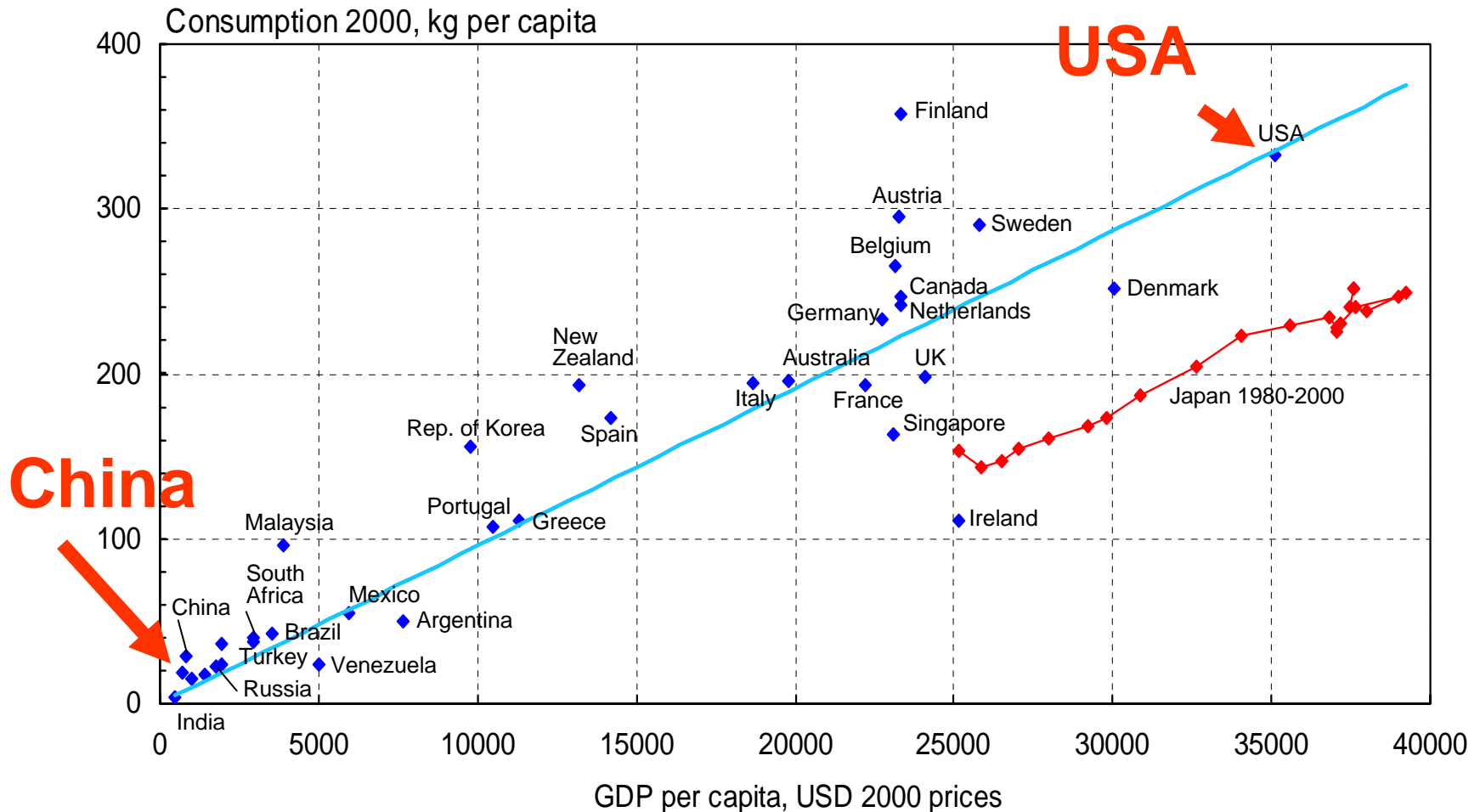


Brian Stafford &  
Associates Pty Ltd

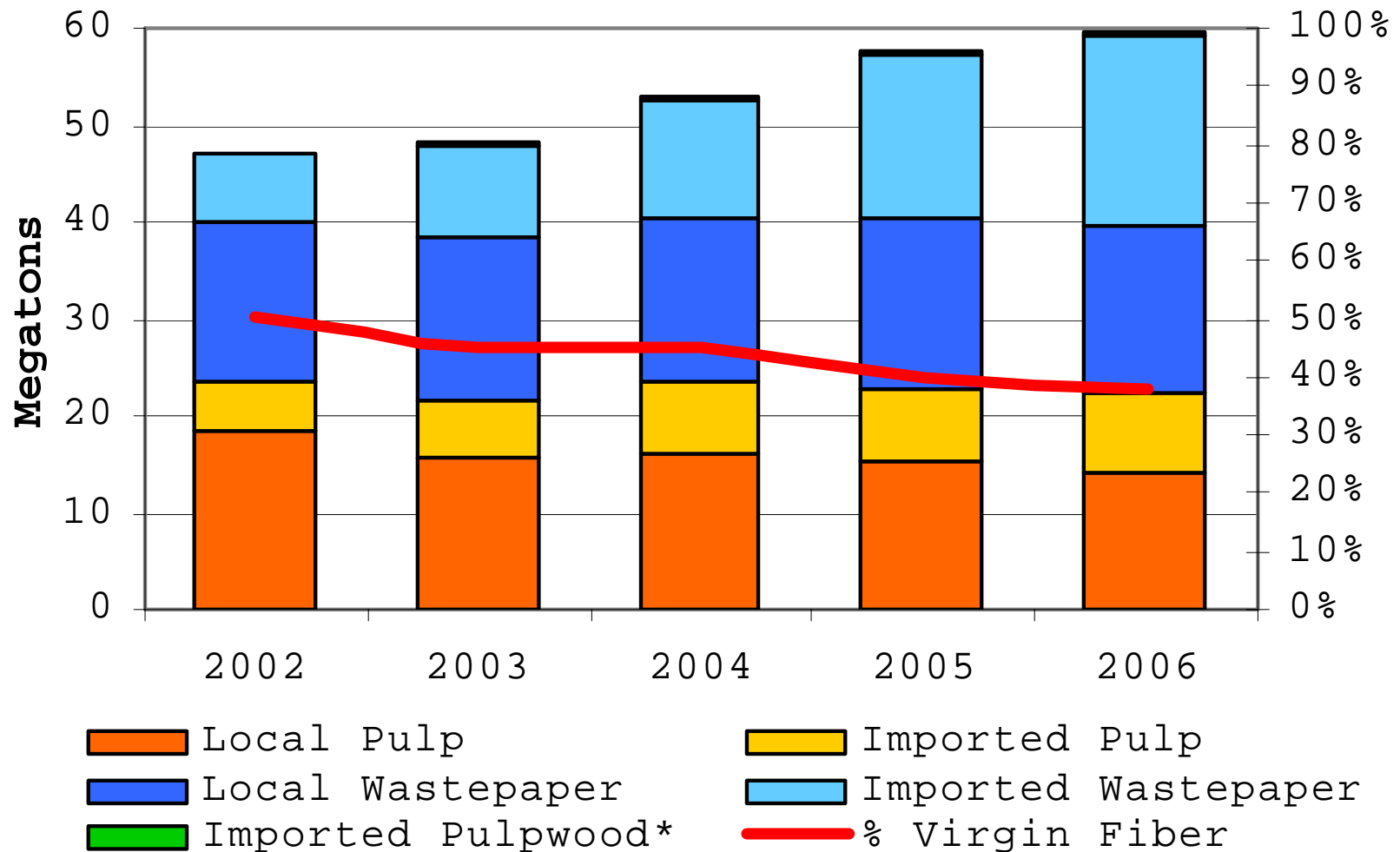
Consultants to the Pulp & Paper Industry

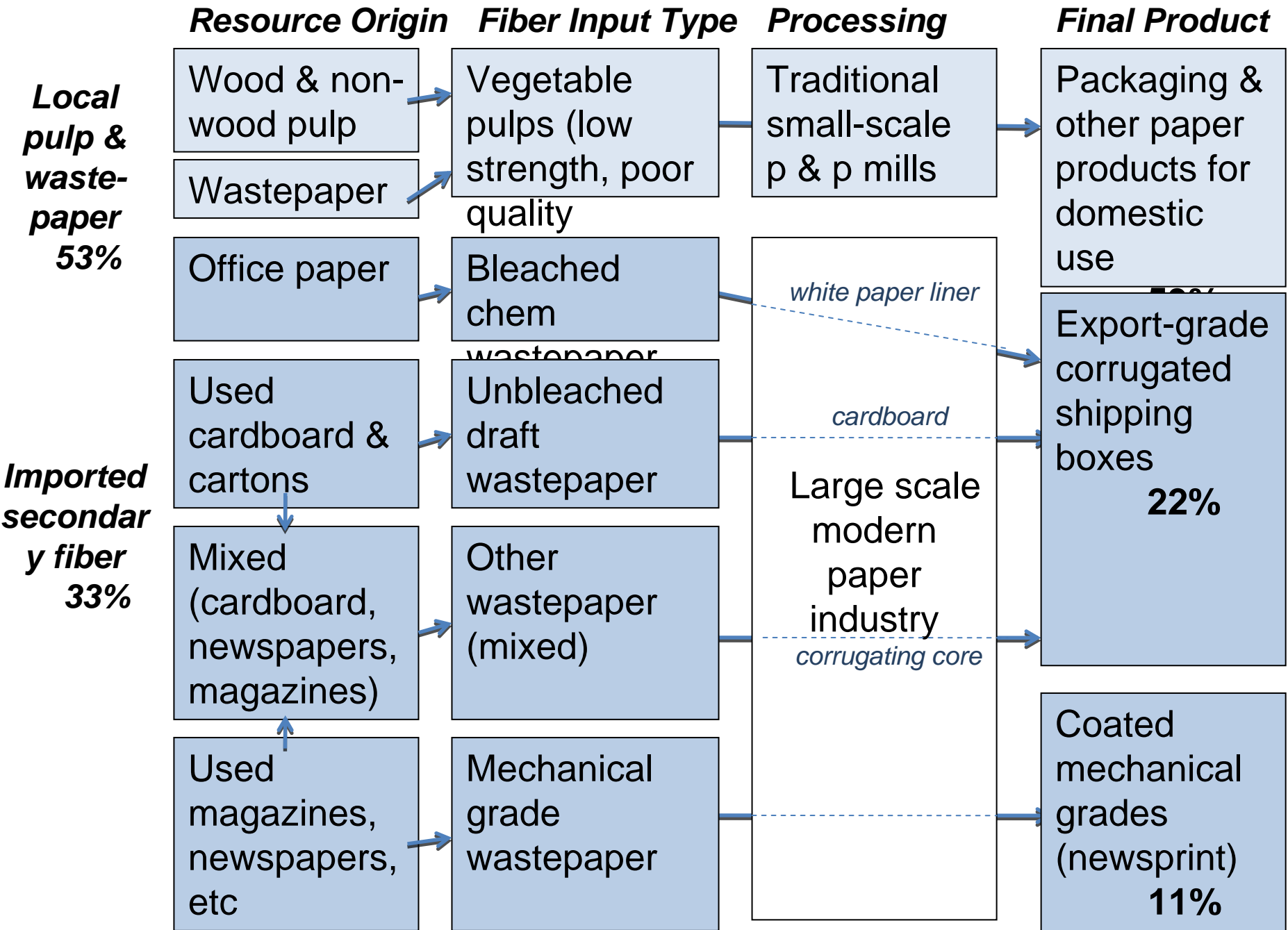
# Where will the supply come from?

## *GDP per capita & paper consumption*

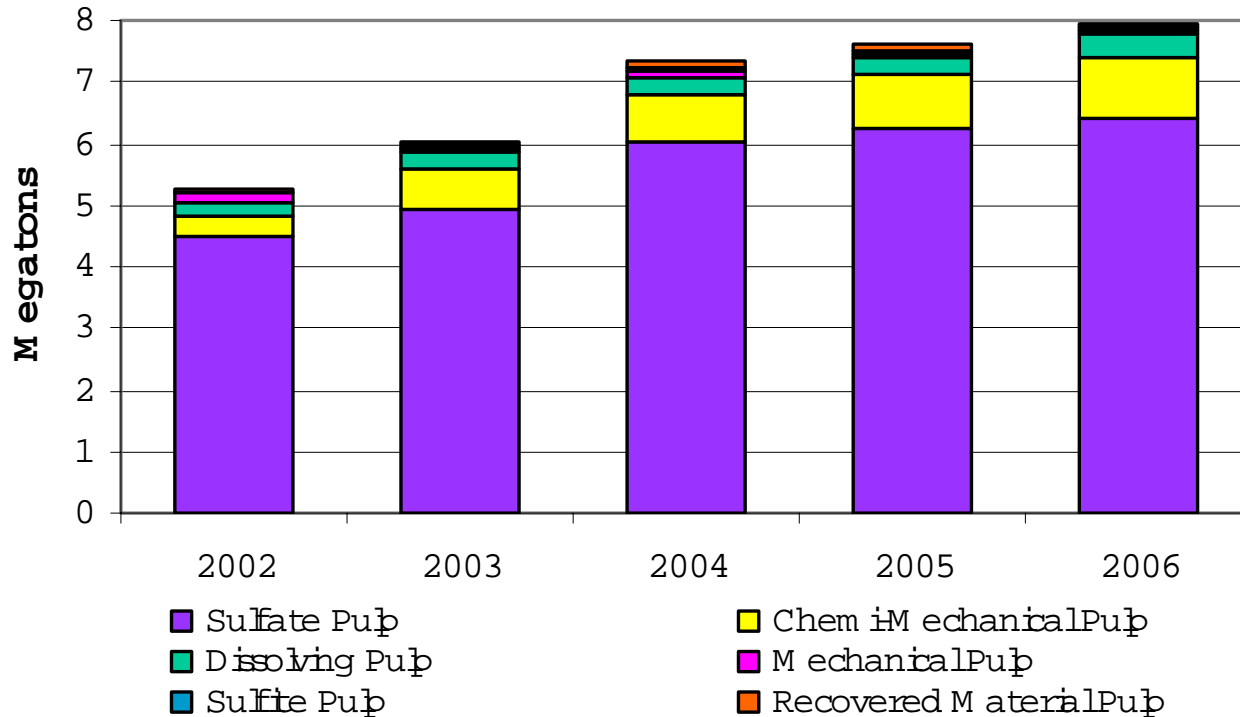
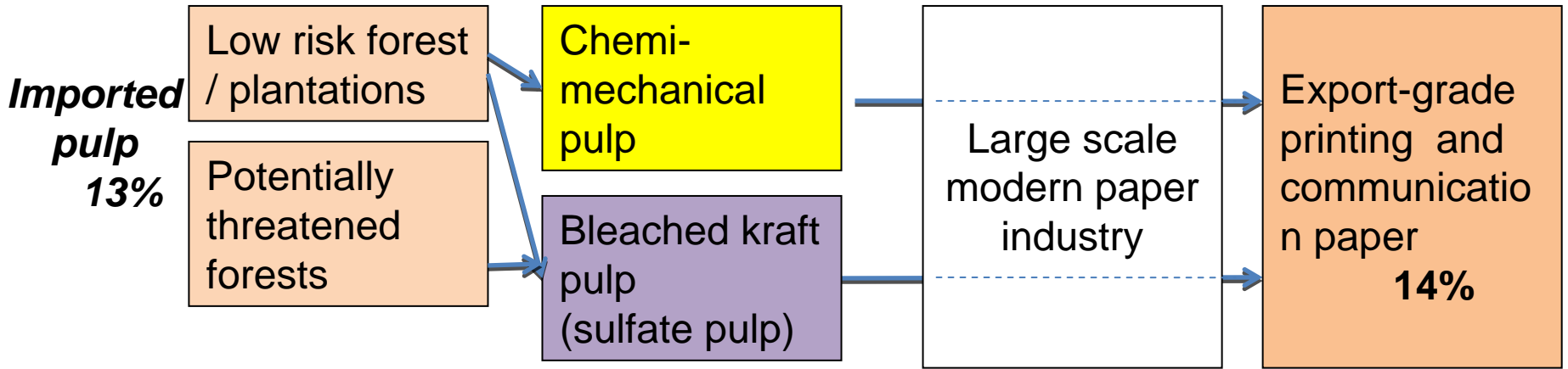


# China's Total Papermaking Fiber Resources

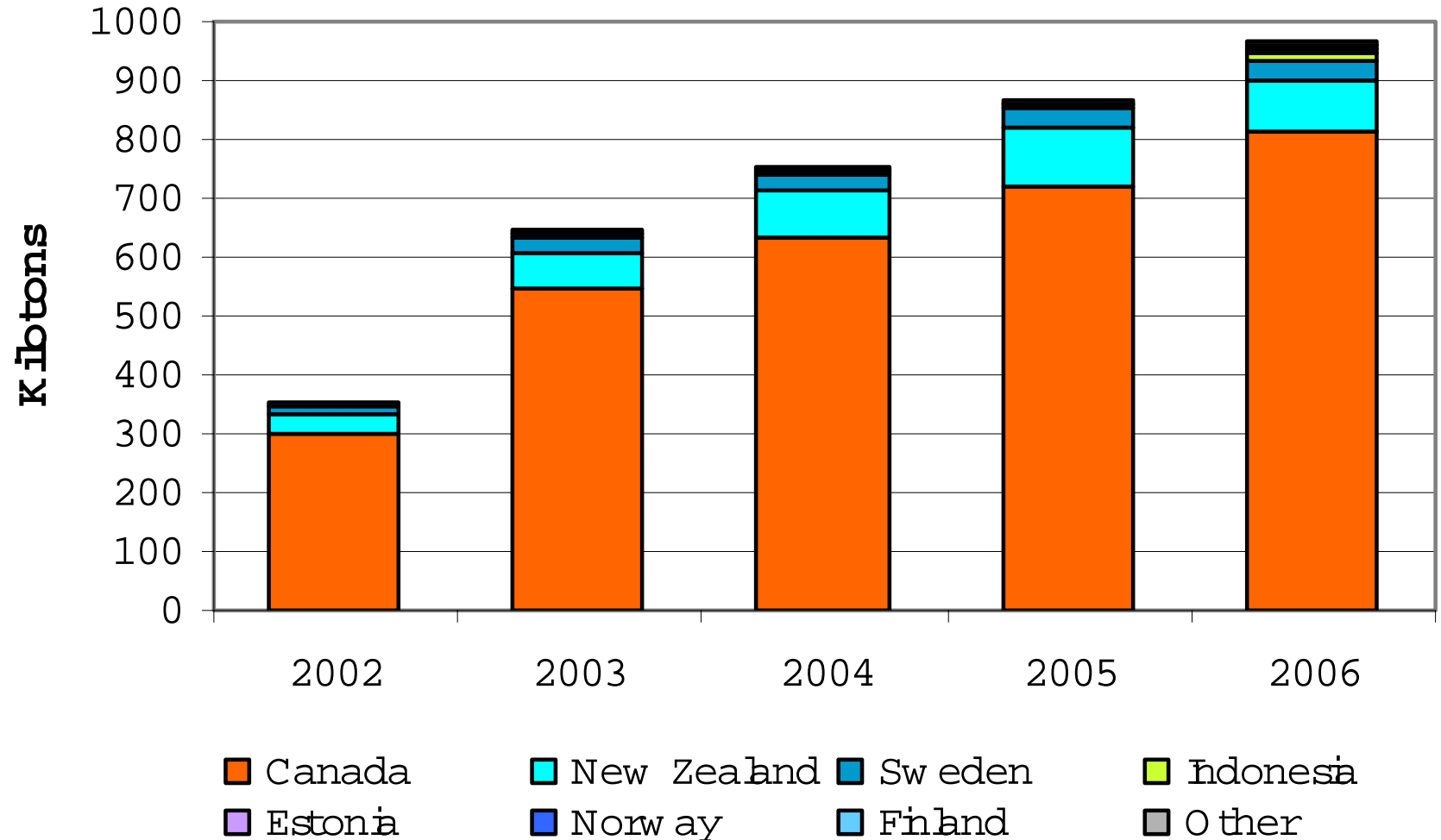




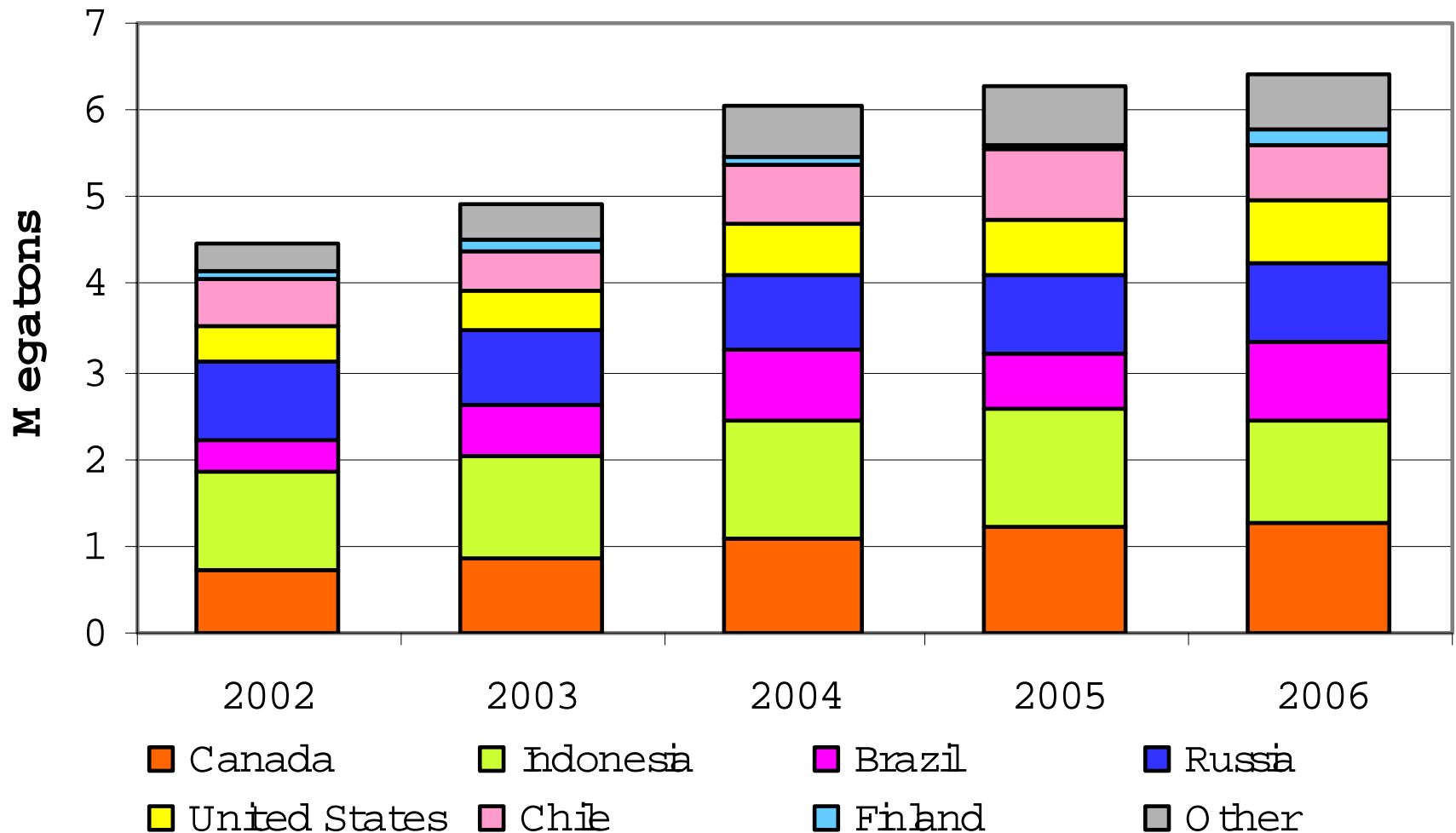
**Resource Origin    Fiber Input Type    Processing    Final Product**



# Why is imported chemi- mechanical pulp considered low risk?



# Why is imported bleached kraft pulp considered higher-risk?



**Resource Origin    Fiber Input Type    Processing    Final Product**

**Imported pulp**  
**13%**

Low risk forest / plantations

Potentially threatened forests

Chemi-mechanical pulp

Bleached kraft pulp (sulfate)

Large scale modern paper industry

Export-grade printing and communication paper  
**14%**

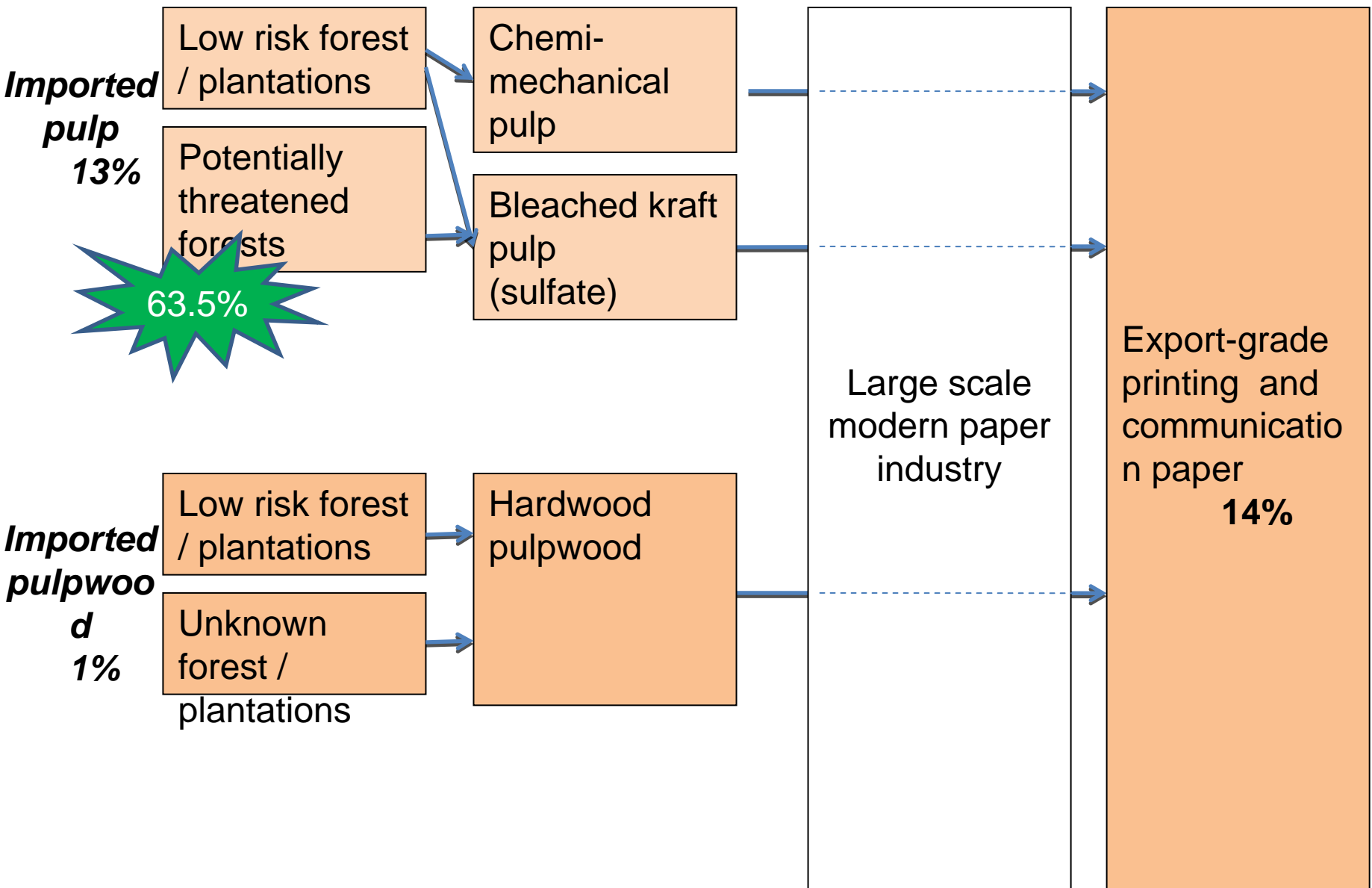
**63.5%**

**Imported pulpwood**  
**1%**

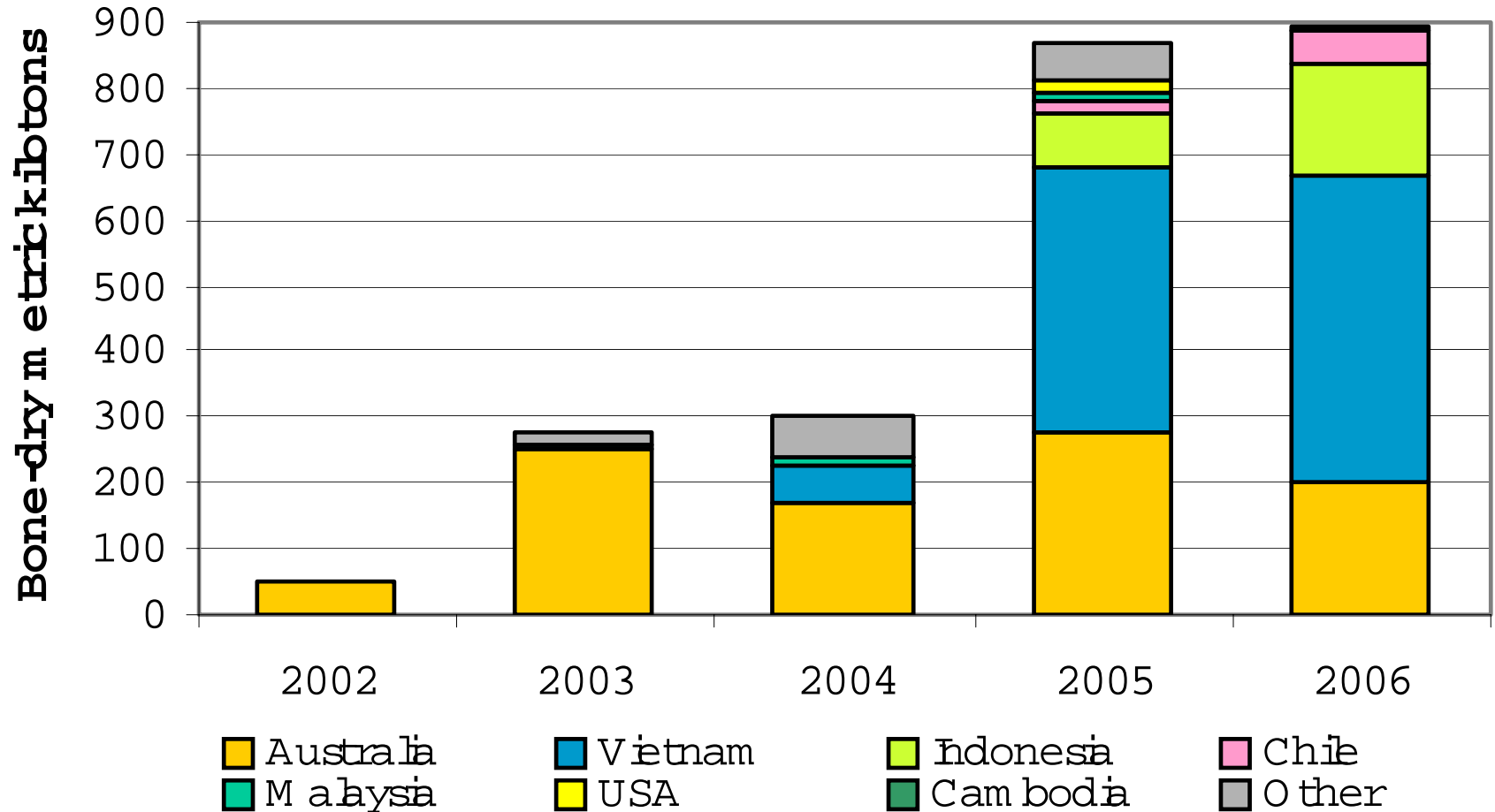
Low risk forest / plantations

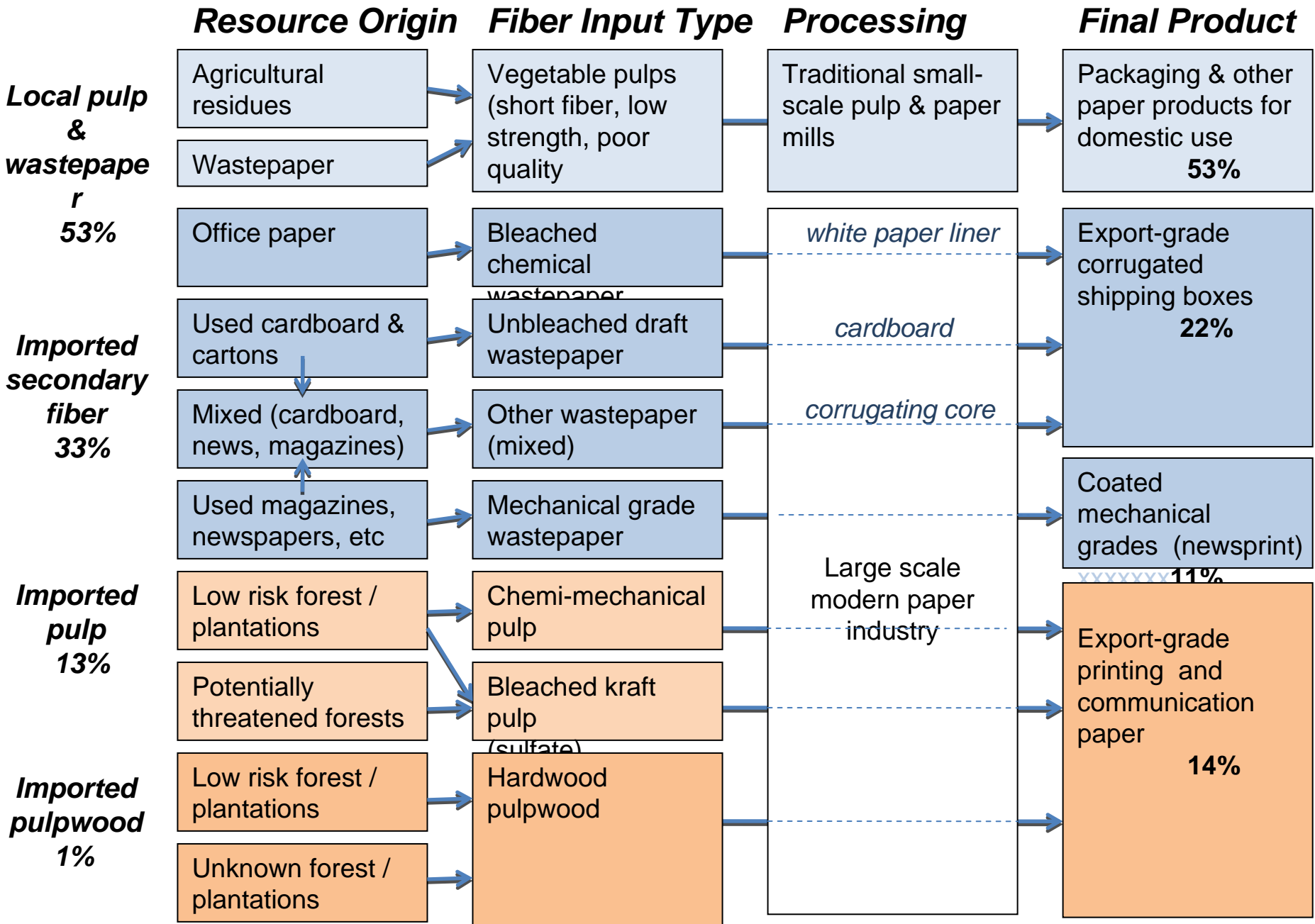
Unknown forest / plantations

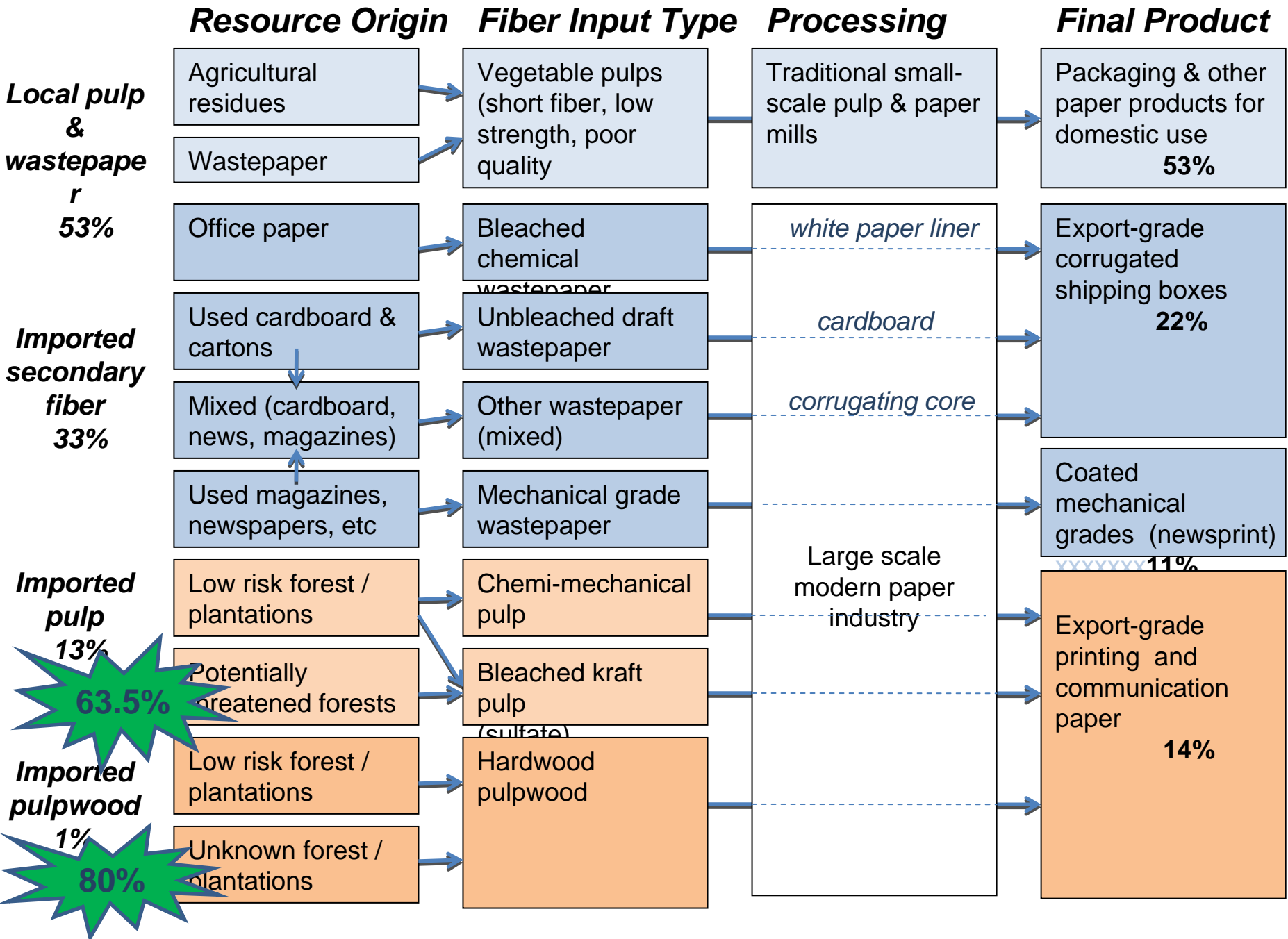
Hardwood pulpwood



# Why is imported pulpwood considered higher risk?







# Recommendations

- Be aware of where pulp and pulpwood is coming from & develop tracking systems to verify origin
- Address the “weakest links” in China’s fiber supply system: the uncertified pulp and pulpwood coming from Russia and Indonesia
  - ensure certified harvested from sustainably managed forest operations & can be tracked through to the mill