TECHNICAL INFORMATION BOOKLET

FCBM 18:98

1997 INDUSTRY SURVEY
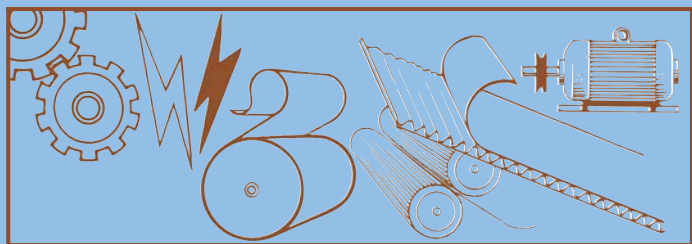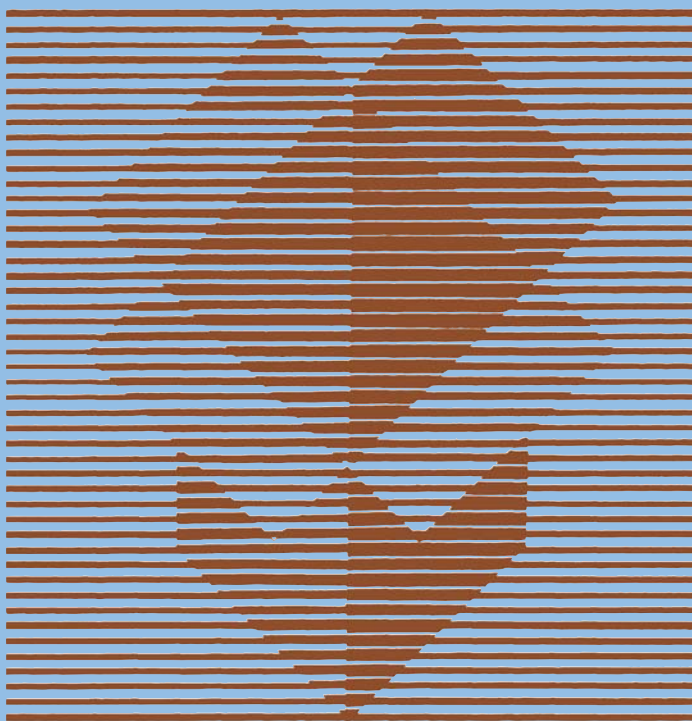
FEDERATION OF CORRUGATED BOX MANUFACTURERS OF INDIA

Compilation of statistical data, on the industry is necessary, for long term planing. This 1997 Industry Survey Booklet, being brought out by the R&D committee of our Federation, is a useful tool and a guiding factor on the direction the industry needs to take in the future.

The R&D committee has been making continuous and consistent efforts in bringing out useful information booklets and publications for the benefit of our industry. These publications have been well received by everyone connected with the Corrugated Packaging Industry. This is an on going process. We have to continuously update the information and relevant factors which will serve as guidelines for the future. These booklets provide such useful data, and I am sure it will prove very useful for the members of our industry.

I once again congratulate our R&D committee on its efforts and I do hope the committee will continue to bring out such useful publications.

Ashwin Shah
President
Federation of Corrugated Box Manufacturers of India

15.5.98

INTRODUCTION

Statistical analysis is a very useful tool to understand the profile of an industry and to predict the potential trends.

The unique advantage of such analysis is that it allows compilation of useful data for the industry while protecting the participant's proprietary information. In other words, by using statistical analysis we can come to some conclusions about the industry as a whole and yet not know any information about the organisations of the participants.

The first survey was conducted by Indian Institute of Packaging in 1985 on our behalf. We conducted our own survey for the first time, in 1996 during the Annual Conference. Encouraged by the response another survey was conducted in 1997, during the Mount Abu Annual Conference.

All three survey results are shown in this booklet

The following points need to be highlighted:

1. Number of participants in 1997 were 53, compared to 161 in 1996. Yet the results are similar, thus reinforcing the power of statistical surveys to predict trends based on limited number of participants.

2. Data on productivity and product category is same.

3. Wastage appears to be lower at 3.43% compared to 3.8% in 1996

4. Raw material profile GSM wise is same.

5. Raw material category BF wise is same except for a shift away from 18 BF in favour of 20 BF.

6.   Market profile is same except for increase in Processed
       Foods category.

Such annual reviews of trends affecting our industry are very useful. We hope to continue the surveys every year at the conferences.

We hope to include some new information such as type of heating source, glue vs. stitch joints, etc., next year.

We look forward to your comments/observations and your active participation in future surveys.

Pankaj Shah
Chairman
R&D Committee

1997 INDUSTRY SURVEY

THE LEGEND

Column A : Survey conducted during 26th FCBM
Conference at Mount Abu on 14.12.1997

For Comparison Purpose

Column B   :   Survey conducted during 25th FCBM
Conference held
at Mumbai on 16.12.1996

Column C   :   Survey conducted by Indian Institute of
Packaging during 1985

Table 1

PRODUCTIVITY

	A	B	C
No. of participants in the survey	53	161	144
No. of Single Facers used	99	237	*
Average Single Facer per participant	1.87	1.5	*
Average production per day per Single Facer (in kgs)	2004	2150	*
Average number of people employed per participant	47	41	34
Average production per day (in kgs)	3744	3172	1360
Productivity kgs/person/day	80	78	40

Columns B and C are for comparison purpose only.

* Not available

Table 2

PRODUCT CATEGORY

Number of plies	A	B	C
2-ply	2%	3%	*
3-ply	25%	28%	*
5-ply	50%	43%	*
7-ply	21%	21%	*
9-ply	2%	5%	*

Columns B and C are for comparison purpose only.

* Not available

Table 3

WASTAGE

Process waste	A	B	C
Average wastage during manufacture	**3.43%**	3.8%	*

(Not including
trim, slots or
punch scrap)

Columns B and C are for comparison purpose only.

* Not available

Table 4

RAW MATERIAL CATEGORY – GSM

GSM	A	B	C
80 gsm	5%	5%	*
90 gsm	2%	1%	*
100 gsm	27%	24%	*
120 gsm	22%	24%	*
140 gsm	14%	12%	*
150 gsm	15%	18%	*
170 gsm	1%	1%	*
180 gsm	9%	10%	*
200 gsm	2%	1%	*
Other	3%	4%	*
	100%		

Columns B and C are for comparison purpose only.

* Not available

Table 5

RAW MATERIAL CATEGORY – BF

Grade	A	B	C
14 BF or less	15%	16%	*
16 BF	14%	11%	*
18 BF	15%	21%	*
20 BF	21%	16%	*
22 BF	14%	14%	*
24 BF	8%	10%	*
25 BF or more	5%	4%	*
Duplex	4%	3%	*
Imported	3%	4%	*
Other	1%	1%	*
	100%		

Columns B and C are for comparison purpose only.

* Not available

Table 6

MARKET PROFILE

Segment	A	B	C
Pharmaceutical	6%	9%	18%
Processed Foods	19%	11%	15%
Fresh Fruits/ Vegetables	2%	5%	1%
Soaps/Cosmetics	9%	7%	14%
Beverages	2%	3%	*
Distillery	9%	8%	7%
Tobacco/Cigarettes	3%	6%	2%
Textiles/Yarns	20%	18%	9%
Electricals/Lamps	2%	4%)	
Electronics	6%	4%)	9%
Glass	2%	2%	2%
Engineering Goods	7%	7%	7%
Consumer Durables	8%	7%	3%
Defence	1%	1%	1%
Miscellaneous	4%	8%	*
	100%		

Columns B and C are for comparison purpose only.

* Not available