

ITC PAPERBOARDS  
& SPECIALTY PAPERS  
DIVISION



**Sustainable  
Paper &  
Paperboard  
Solutions**



# ITC : An Exemplar in Triple Bottom Line Performance

Gross Revenue  
**₹69,481 Cr**  
for the year ended  
31st March, 2023

Among the  
**Top 3**  
contributors to the  
Exchequer in the  
private sector in India

ITC's FMCG products  
reach over  
**230 million**  
households in India

**12** Future-ready  
Businesses across  
Agriculture,  
Manufacturing and  
Services

Over **110** countries  
where ITC exports

Over **6 million**  
Sustainable  
livelihoods supported

ITC is the only Company in the world to be:



e-Choupal  
**4 million**  
farmers empowered



Afforestation  
Over **1.04 million**  
acres greened



Watershed Development  
Over **1.47 million**  
acres covered



Livestock Development  
Over **468,000**  
households benefitted



Solid Waste Management  
Well Being Out of Waste (WOW)  
programme covers over  
**22 million** citizens



Women Empowerment  
Over **122,000**  
poor women benefitted



Skilling & Vocational Training  
Over **120,000**  
youth enrolled



Primary Education  
Reaching  
Over **1.12 million**  
children



Health & Sanitation  
Over **39,600**  
toilets built





12

Businesses

spanning Agriculture, Manufacturing, Services

▼

FMCG

One of the fastest growing in the country

- ITC is India's leading FMCG marketer
- Portfolio of 25 mother brands in Foods, Personal Care & Hygiene Products, Education & Stationery Products, Agarbattis & Matches
- Powered by world class quality, superior consumer insights, cutting edge innovation and purpose led brands
- Anchoring agri value chains



Agri Business

Empowering farmers

- ITC is a pioneer in rural transformation
- Encompasses over 4.5 million tonnes in 22 States and over 20 agri value chain clusters
- One of India's largest exporters of agricultural commodities
- ITC e-Choupal empowered 4 million farmers in India
- e-Choupal 4.0: Creating phygital ecosystem for farmers



Paperboards & Packaging

Global icon in Environmental Stewardship

- Clear leader in Value Added Paperboards
- Pioneering Sustainable Packaging Solutions
- Contributing to 'Make in India' and Import Substitution
- Anchoring local forestry value chains; empowering farmers



Hotels

Trailblazer in 'Responsible Luxury'

- ITC Hotels is one of India's pre-eminent and fastest growing hospitality chains
- 120 hotel properties in over 70 locations
- 'Largest Chain of Hotels in the World, with maximum LEED® Platinum Certified Properties', as per USGBC
- ITC Windsor, First Hotel in the World to achieve LEED® Zero Carbon Certification
- Iconic Cuisine Brands

ITC Infotech

Delivering Business-friendly Solutions

- Wholly-owned subsidiary of ITC Limited
- Leading global technology services and solutions provider
- Presence across 5 continents
- Enterprise clients serviced across Banking, Financial Services, Consumer Packaged Goods, Manufacturing, Travel, Hospitality and Healthcare





## ITC Paperboards & Specialty Papers Division

**India's largest, greenest, and most technologically advanced paper & paperboards**

**business,** ITC's Paperboards & Specialty Papers Division (ITC PSPD) offers innovative and sustainable packaging, graphic, communication, printing and specialty papers and paperboards. Its deep understanding of sustainability and compliance to global standards has made the Business the leader in the country's pulp and paper industry.



### Leadership

- Industry leader by volume, product range & environmental performance
- Market leader in VAP – Value Added Paperboards (India's fastest growing segment)
- Best-in-class profitability



### Innovation

- End-use based product development
- Sustainability at the core of product design
- Strong R&D focus on anticipating & developing solutions for evolving market needs
- First-to-market in alternatives to Single-Use Plastics



### Industry 4.0

- Leveraging existing systems to create value from Industry 4.0 adoption
- Convergence & application of 4.0 levers, big data & analytics, cloud computing
- Data & IoT based process controls



### Exports

- Sales in more than 50 countries
- Well-established brands driven by Quality & Environmental certifications



# Leadership through Innovation & Sustainability

Starting operations in 1978 in Bhadrachalam in the Indian state of Telangana, ITC PSPD today operates four manufacturing facilities, all of which have world-class assets, practise TPM and are now adopting Industry 4.0 techniques with increasingly data-driven processes.



The Business largely draws its raw material from farmer-managed plantations in India, reducing dependence on imported pulp. Its state-of-the-art Bhadrachalam plant has an approximate annual fibre intake of over 1.7 Million Tons, enabling substantial import substitution, and thereby :

- Supporting sustainable livelihoods for small farmers in the agro-forestry value chain
- Contributing to the national Make in India mission
- Creating economic, social & environmental value for the nation

## Promoting a Greener Value Chain



First in India certifications :  
FSC® (Forest Stewardship Council®)  
and CII Greenco Platinum Plus



Benchmarking production  
to best global environmental  
standards



Proactive farmer connect  
to develop renewable  
pulpwood plantations  
(responsible & sustainable  
raw material)



Largest waste management  
initiative in the Indian industry



## Product Portfolio

# Innovating to Substitute Single-use Plastics

Managing plastic waste, in particular single-use plastics, is a key global environmental challenge. Leveraging the Company's R&D capability for cutting-edge innovation, ITC PSPD is developing sustainable paperboard and packaging solutions and has launched several products, with more in the pipeline.






ITC Life Sciences and Technology Centre (LSTC) drives science-led product innovation for the ITC Group. Aiming to not only meet, but also to anticipate consumer needs, it constantly pursues innovative solutions that rise progressively higher in customer satisfaction and the sustainability value chain such as environmental alternatives to single-use plastic applications.

## Barrier Boards

Sustainable Packaging Solutions for Food & Beverage Industry

### Omega Series

-  Compostable under industrial composting conditions. CIPET - IS17088/ASTMD6868/EN-13432
-  Liquid /grease barrier at par with traditional plastic-coated boards
-  Unit registered with CPCB for Compostable Products Manufacturing




Paper cups for  
hot & cold  
beverages



Paper cups for  
hot & cold  
beverages



# Filo Series

-  Recyclable under existing standard recycling mechanisms - CPPRI
-  Compostable under industrial composting condition. CIPET - IS17088/ASTMD6868/EN-13432
-  Unit registered with CPCB for Compostable Products Manufacturing

Food serving applications, e.g. plates & trays



Food delivery and deep freeze applicatons



Paper cups for hot & cold beverages





Replaces conventional plastic coated tubs







Aerobically Biodegradable in Soil environment. CIPET - IS 17556



# Indo Series

-  Paperboards with thin LDPE extrusion coating, substantially reducing plastic consumption
-  Recyclable in industrial recycling mechanisms



Deep freeze packaging



Paper cups for hot & cold beverages



Bowls for food delivery



ITC PSPD is the largest manufacturer of Packaging and Graphic Boards in South Asia. Along with its sustainable packaging solutions, its product basket also includes a diverse range of Specialty Papers & Boards to fulfil a variety of needs. Strongly market driven, the product portfolio focuses on value addition, new product development, quality enhancement, innovation and sustainability. ITC PSPD's products and pool of knowledge-based services are much sought-after by discerning customers, both in India and internationally, for sustaining and improving their competitiveness.

# Packaging & Specialty Boards

Contemporary products to meet the requirements of a wide variety of customers seeking high-end graphics, fidelity, print appeal and trouble-free performance on high speed printing and conversion lines.

## Virgin Boards



First ever branded game changer from ITC PSPD



Avant-garde paperboard designed for luxury packaging



Superior brightness and whiteness for enhanced visual appeal



Folding box board for everyday packaging needs



Specially designed for high speed cigarette packaging



Top-liner for high-end corrugated cartons



Solid board designed for Indoor Advertising applications



Folding Box Board (FBB) designed with high bulk and bending stiffness



Cupstock base board used in making paper cups for hot and cold beverages



**FUSION BOARDS**  
Solid Boards for multiple applications



**LIQUID PACKAGING**  
Specially designed for aseptic liquid packaging solutions



**PLAYING CARD BOARDS**  
Super-Calendered Boards with superior surface finish and high gloss



Paperboard with a special Anti-fungal coating used in soap packaging



Super-calendered board with exceptional smoothness and gloss



Super-calendered board cut-to-size for digital printing



The next-gen art board with enhanced strength and aesthetics

## Recycled boards



Premium white-back board offering superior stiffness



High Quality grey-back board for strong and sturdy cartons



Award-winning board designed for optimum performance in blister packaging applications



Top choice for Top-liner Applications



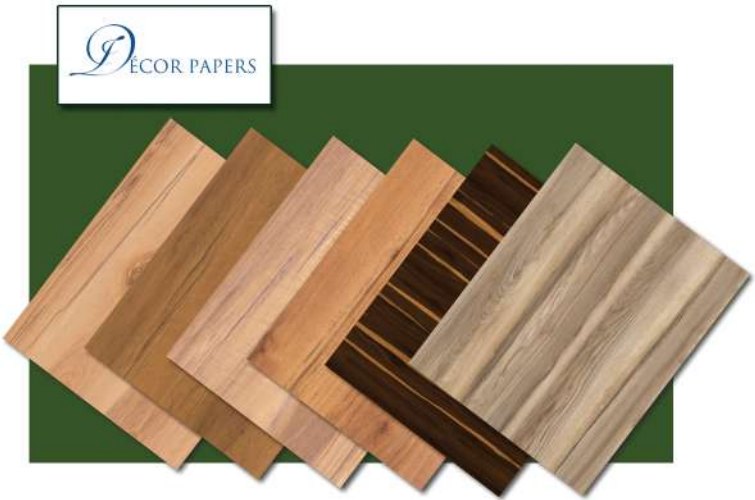
# Papers

Range of specialty papers tailor-made to meet the requirements of niche applications, from Décor papers to fine printing papers, wrapping papers to insulating papers and much more.

## Décor Papers

International quality Décor Papers for laminates that stand apart. Available in both whites and colours. Superior printability and easy availability make these the ideal choice for laminates.

- Superior print reproduction
- Range of brilliant trending colours
- Customised to HPL / LPL application
- Perfect for high-speed impregnation
- Excellent strength properties and durability
- Superior runnability and printability



### Communication



### Niche Products



Overlay Tissue



Low Porosity Base Tissue



Flameproof Paper



Insulating Paper

### Packaging



Anti-Rust Tissue



Anti-Fungal Soap Wrap

# Changing the Game

## Creating Brands out of Commodities

In India, ITC PSPD pioneered the concept of creating strong paper and paperboard brands, distinguished by clear performance parameters and consistency.

## Co-creating Brand Value

Collaborating closely with brand owners and packaging teams has enabled the co-creation of value as well as assured quality and supply for brands. Today many of ITC PSPD's products are trusted and nominated by major brands in the country, right from India's top-selling face cream to its leading coffee chain.

### Some of our Iconic Brands



## Serving Top Brands across Diverse Industries



Consumer Goods



Foods



Beverages



Liquor



Pharma



Publishing



Graphic



Laminates



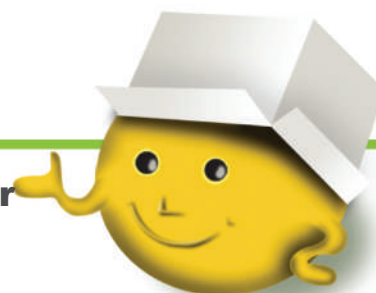
Garments



E-Commerce

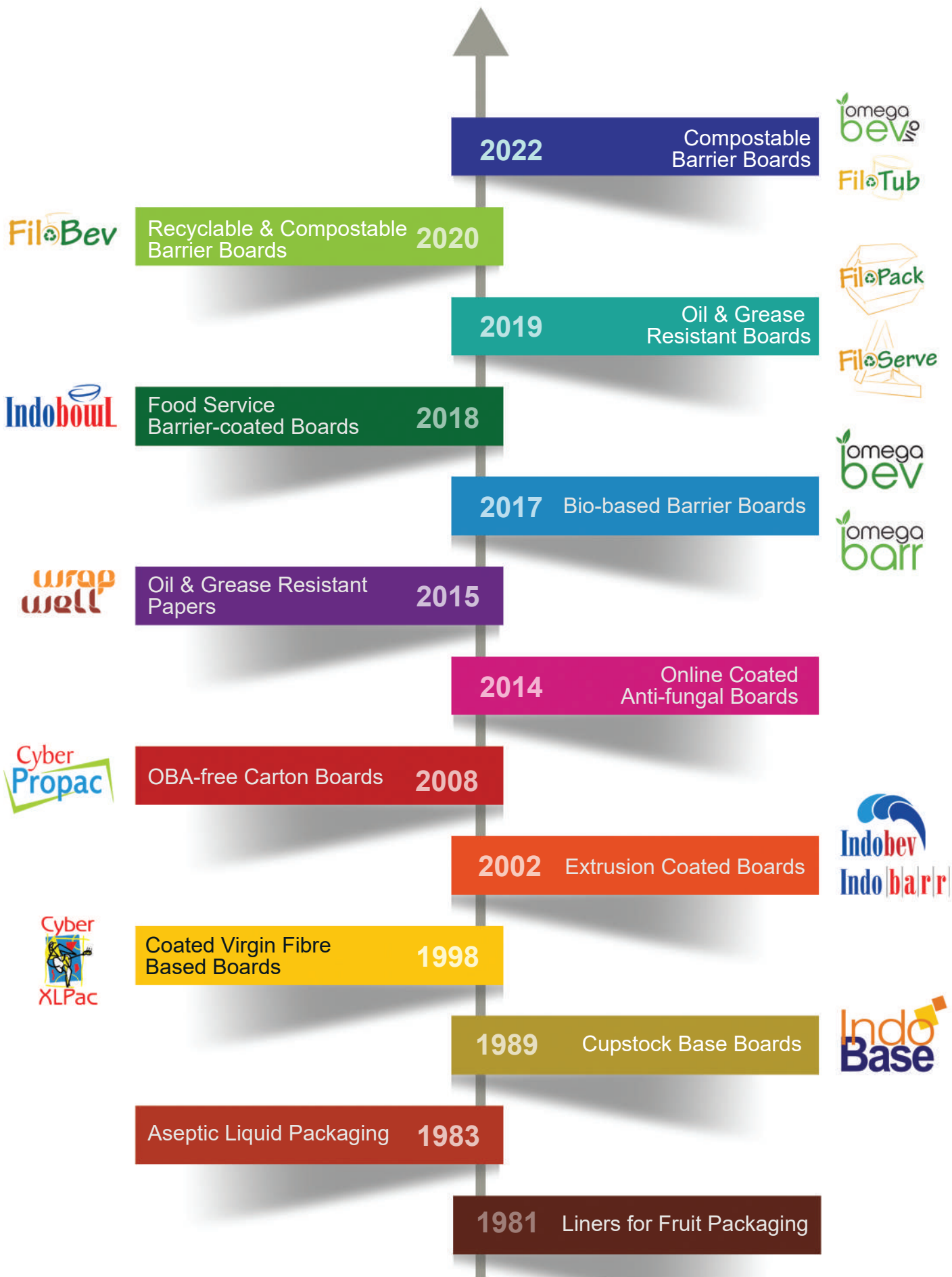
## Digital Tools to Serve Customers Better

The Indian pulp & paper industry's first app, Papyra was launched in 2015 to help users choose the right paper/paperboard for their packaging, graphic or specialty applications.





# First-to-market Products





# Operations Footprint

## 4 Manufacturing Locations supported by a pan-India Distribution Network

### Unit Bhadrachalam Integrated Pulp & Paper Mill

India's largest integrated Pulp & Paperboard Manufacturing Unit  
~8,00,000 TPA TPA of Virgin Paper & Paperboards

First in the Indian Paper Industry to obtain the FSC® - FM certification for its forestry programme

Pulpwood sourced from sustainable farmer-managed plantations under ITC's Afforestation Programme

Fully integrated Ozone-bleached pulp mill operating to world-class environmental standards



### Unit Kovai Recycled Boards

~1,20,000 TPA of Recycled Boards

First Paper Mill in India and second globally to achieve Platinum rating under the Alliance for Water Stewardship Standards



### Unit Bollaram Barrier Coated & Solid Boards

Barrier Coated Boards for Food & Beverage applications

Solid boards for Packaging & Indoor Branding

Conforms to BRC Global Standards for Packaging & Packaging materials



### Unit Tribeni Specialty Papers

~60,000 TPA of Specialty Papers

Diverse range of Specialty Papers, including Packaging, Thin Printing, Décor and Insulation Papers



# Benchmarked to the Best Global Standards



## Forest Stewardship Council® (FSC®)

- First paper company in India to obtain the Forest Stewardship Council® Forest Management (FSC®-FM) certification\* for its forestry programme
- All 4 manufacturing units are FSC®-CoC (Chain of Custody) certified\*\*

\* FSC®-C102390 \*\* FSC®-C064218



## BRC Global Standard for Packaging & Packaging Materials

- Unit Bollaram – Certified with highest Grade AA rating
- Unit Bhadrachalam – Certified Grade A for food grade boards



## The Book Chain Project

- Products graded on the Book Chain Project - an initiative from leading global publishers to make informed buying decisions



## CII GREENCO Platinum Rating

- The first Pulp & Paper company to be certified under the CII GreenCo Rating System
- Units Bhadrachalam & Kovai have achieved Platinum+ – the highest rating in the system



## SEDEX (Supplier Ethical Data Exchange)

- Member of SEDEX, a globally recognised collaborative platform to store, share and report on information on Labour Standards, Health & Safety, Environment and Business practices



## ECF (Elemental Chlorine Free)

- First in India to set up an environmentally cleaner ECF pulp bleaching line in 2002, followed by a more advanced Light ECF line in 2007

## Awards & Accolades

ITC PSPD has won numerous awards for quality, environmental management systems and product excellence. A selection of recent awards:

- ITC PSPD's Unit Bhadrachalam (December 2023) & Unit Kovai (September 2022) has received the prestigious GreenCo Platinum+ rating under CII GreenCo - Green Company Rating System
- ITC PSPD was declared as the 'Winner' in the 'Internet of Things and Digitalization' category at the Pulp & Paper International (PPI) Awards, held in Lisbon, Portugal in March 2022
- ITC PSPD's Unit Bhadrachalam has been declared as "The Winner" in "Within the Fence" category under CII-National Awards for Excellence in Water Management 2021
- ITC PSPD's Unit Bhadrachalam has been declared as "The Winner" in "Excellent Energy Efficient Unit" award category under CII-National Awards for Excellence in Energy Management 2021
- ITC PSPD's FiloPack FiloServe & FiloBev and Green Stiffener have been Awarded as 'Most Innovative Environmental Project' at 7th Edition of CII Environmental Best Practices Award 2020.

## Top-of-the-line Systems

ISO 9001: 2008 Quality Management System

ISO 14001: 2004 Environmental Management System

ISO 45001: 2018 Occupational Health & Safety Management System

BRC Global Standard Issue 6 : 2019 – Global Standard for Packaging & Packaging Materials

8 Pillars of TPM Methodology



# Environmental Stewardship & Creating Value for Society

ITC is committed to minimising the environmental footprint of its operations and maximising its contribution to nurturing natural resources. All ITC businesses, including ITC PSPD units, are dedicated to continuously improve their environmental performance. Beyond its operations, ITC PSPD focuses on both ends of the value chain with two large-scale initiatives – an Afforestation Programme to ensure sustainable raw material sourcing, and WOW (Wellbeing Out of Waste) which aims to improve urban solid waste management.

## Creating green cover, supporting sustainable livelihoods, enabling large-scale CO<sub>2</sub> sequestration

- Under the Farm Forestry Programme, high-yielding, site specific, disease-resistant saplings specially developed by ITC R&D are sold to farmers and extensive support is provided in terms of best practices along with a buy-back guarantee.
- Under the Social Forestry Programme, tribal and marginal farmers are assisted with loans, saplings at subsidised rates and extended services.
- The Agro-forestry model, which combines tree growing with field crop production, ensures both food and wood security.

## Pulpwood Plantations – Benefits for Stakeholders

**Farmers** – earn significantly higher incomes which is especially beneficial to poor farmers

**Indian Paper Producers** – gain access to a local, renewable & responsible raw material source

**Environment** – green cover, carbon sequestration, top soil retention, ground water replenishment

## ITC's Afforestation Programme



## Impact

Total Plantations:  
Over 1.04 million acres

Wood procurement from farmers (in 2022-23):  
1.49 million MT

Employment generation:  
190 million person-days

CO<sub>2</sub> sequestered (in 2022-23):  
5.9 million MT

As on 31<sup>st</sup> March, 2023







## Wellbeing Out of Waste

### Promoting Reduce-Reuse-Recycle, generating livelihoods, working towards a circular economy

ITC's WOW initiative promotes awareness about the importance of source segregation, recycling and composting, and establishes systems to enable effective practice. Working in collaboration with local municipalities, waste handlers and ragpickers are trained to provide an efficient collection service that covers virtually all segments: households, offices, schools, hospitals, commercial establishments, etc.



### Source segregation

**Reduces** amount of waste going to landfills

**Provides** competitive raw material to several industries through dry waste collected, e.g. glass, paper & plastic

**Ensures** regular work & enhanced incomes for waste collectors

**Generates** new opportunities for recycling entrepreneurs

### Impact

Reaches over  
**22 million citizens**

Supports sustainable  
Livelihoods for over **17,750**  
waste collectors

Created **150**  
social entrepreneurs

~**64,000 MT** dry waste  
collected from **1,270 wards**  
(in 2022-23)

As on 31<sup>st</sup> March, 2023







## PAPERBOARDS AND SPECIALTY PAPERS DIVISION

### WEB

[www.itcpspd.com](http://www.itcpspd.com)  
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### DIVISIONAL HEAD QUARTERS

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# PAPYRA



Papyra – an app that guides you to choose the correct paper / paperboard for your applications.

**Download PAPYRA** today and discover how it's packed with benefits for you!

ITC's Papyra App  
available on



or visit : <http://www.itcpspd.com/papyra> (web version)