



PAPER & PACKAGING INDUSTRY

Insights into Human Capital & Locations 2022

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Our world has changed rapidly in the recent years. Businesses have been forced to reimagine themselves. As companies globally reorganize themselves looking for growing markets, stability; reliability in their supply chains; efficiency in operations and workforce, new opportunities emerge.

A promising opportunity for global companies lies in India which uniquely offers both a large and growing demand, and a Paper & Packaging base for the globe, beyond just APAC. A democratic India offers an alter In-State to China, as the world loses confidence in China's economy, governance, and geo-political intentions. With many marquee companies already running large manufacturing operations in India, it is not a leap of faith but a logical destination to achieve the manufacturing imperatives of scale, efficiency and quality.

The objective of this report is to provide executives from the Paper & Packaging industry anywhere in the globe, very relevant information which will help them:

- Quantify cost and skill advantages in human resources that India offers
- Select the right manufacturing destination within India based on their individual context
- Obtain human resources and related data for business planning

This is the most comprehensive report on the Paper & Packaging industry, which covers the various sub-sectors in great detail. The workforce insights and compensation benchmarking will provide unparalleled insights across all business functions and seniority levels. I thank you for trusting us to provide this critical human capital related information. We hope you are successful in your journey, of expanding or investing in your manufacturing base in India. Stay safe. Stay strong. Make in India.



Gaurav Chatur
Managing Director, Asia- Pacific
Catenon APAC





As businesses globalize and traverse international borders, supply chain decisions have become increasingly complex. One of the key strategic issues that Paper & Packaging companies face is the selection of location to set up a new facility. Often, the strategic selection of a country is driven by broader issues such as ease of doing business, tax regimes, labor reforms and strength of supply chain, which drive the favorability of a country as the manufacturing destination of choice. Geopolitical issues have emerged as an important consideration for global companies to make such decisions. India ranks highly on the world map as an attractive destination for global Paper & Packaging companies. This helps companies get access to a huge local market while also de-risks their supply chain aberrations. There has been a series of initiatives and policy reforms undertaken by the Indian government to establish India as a manufacturing hub for the Paper & Packaging industry. These include, but are not limited to corporate tax reduction in 2019, Make in India, Skill India and many more. Recently, the Central Government and various state governments have made robust announcements to attract foreign firms to start manufacturing in India by further easing land acquisition and labor laws.

While there is abundant knowledge around frameworks that help in making decisions related to selection of location to set up a Paper & Packaging facility, synthesis of information to evaluate the multiple criteria that feed into these frameworks is often a herculean task. Some important factors that leaders need to make informed decisions are:

- **Industry ecosystem**
- **Workforce & skill availability**
- **Manpower cost**
- **Workforce preferences**
- **Developmental Parameters and Quality of Living**
- **Transportation (Air, Rail, Road, Ports)**
- **Digital connectivity (broadband, voice)**
- **Tax incentives**



Executive Summary

(2 of 2)

Decision makers often struggle to obtain accurate and relevant data on each of the above factors. This report covers the Paper & Packaging industry while duly taking into consideration the diverse nature of clusters and workforce issues within every sub-sector of the industry. Whether you are looking for intelligence regarding a specific location or want to have a detailed view on salary levels across functions such as operations, sales, marketing etc, this is the most comprehensive report you can consider.

The report is divided into three sections, each covering a specific aspect of the Paper & Packaging industry

- **Location Intelligence & Developmental Parameters**
- **Workforce Insights & Compensation Intelligence**
- **Additional Industry Insights**

This report has been created with a singular focus in mind – to help decision makers obtain the right set of data points and information to make decisions regarding locations and human resources pertaining to the Paper & Packaging industry in India. The granularity of the report in terms of sub-sector and cluster level information makes it a must have tool for decision makers in the Paper & Packaging industry.

17

Business
Functions

200K+

Data Points

150+

Manufacturing
Professionals

20+

HR Leaders

Paper & Packaging

- India Paper and Paperboard Packaging Market is poised to grow at a CAGR of 6.63% by 2027
- India accounts for around 4% of world's paper production
- Growth in consumption through organized retail and high quality requirements from branded FMCG products are major drivers of growth for this industry



Paper & Packaging Location Intelligence

The Paper & Packaging industry report consists of detailed insights into 2 sub-sectors:

- Paper (pulp, paperboards and cellulose based products etc.)
- Packaging (flattened cans, bottles, plastic film laminates, lining, rigid and flexible plastic packaging etc.)

Key areas covered in this section of the report include:

- a. Manufacturing clusters of the Indian Paper & Packaging industry by sub-sector
- b. Transportation connectivity (airports, railway stations, highways and ports)
- c. Developmental parameters and digital network connectivity (broadband and voice)
- d. Industry ecosystem
- e. Presence of other manufacturing industries in the clusters
- f. Major global Paper & Packaging companies in India



Paper & Packaging Location Intelligence: Geographical Input



LOCATION



STATE



CLOSEST AIRPORT



CLOSEST TRAIN STATION



HIGHWAY (NATIONAL / STATE)



NEAREST PORT



NEAREST CITY



PAPER

Chennai	Tamil Nadu	5 KM	Chennai 10 KM	NH 16	Chennai 20 KM	Chennai
Hyderabad	Telangana	10 KM	Hyderabad 10 KM	NH 65	Vizag 650 KM	Hyderabad
Kolkata	West Bengal	5 KM	Kolkata 5 KM	NH 2	Kolkata 20 KM	Kolkata
Rayagada Sewa, Jeypore	Odisha	82 KM	Jeypore 5 KM	NH26	Vizag 215 KM	Jagdalpur 82 KM
Ahmedabad	Gujarat	5 KM	Ahmedabad 10 KM	NE 1	Kandla 297 KM	Gandhinagar 27 KM
Pune (Ashti,Bhigwan,Maval)	Maharashtra	15 KM	Pune 15 KM	NH 48	JNPT 139 KM	Pune
East Godavari	Andhra Pradesh	67 KM	Gollaprolu 32 km	NH 16	Vizag 198 KM	Mummidivaram 110 KM
Silvassa	Dadra & Nagar Haveli	139 KM	Thane 155 KM	NH 848A	Mumbai 189 KM	Surat 79 KM
Vapi	Gujarat	85 KM	Vapi 10 KM	NH 8	Kandla 653 KM	Surat 67 KM



PACKAGING

Faridabad	Haryana	5-20 KM	Faridabad 5-20 KM	NH 2	Kandla 1107 KM	Gurugram 38 KM
Kolkata	West Bengal	5-20 KM	Kolkata 5-20 KM	NH 2	Kolkata 5-20 KM	Kolkata
Mumbai	Maharashtra	5-20 KM	Mumbai 5-20 KM	NH 48	Mumbai 5-20 KM	Mumbai
Chennai	Tamil Nadu	5-20 KM	Chennai 5-20 KM	NH 16	Chennai 5-20 KM	Chennai
Chittoor	Andhra Pradesh	67 KM	Tirupati 70 KM	NH 40	Vizag 837 KM	Tirupati 70 KM
Vadodara	Gujarat	5-20 KM	Vadodara 5-20 KM	NE 1	Kandla 406 KM	Ahmedabad 112 KM
Silvassa	Dadra & Nagar Haveli	138 KM	Thane 155 KM	NH 848A	Mumbai 189 KM	Surat 79 KM
US Nagar	Uttarakhand	12 KM	Rudrapur 22 KM	NH 109	Kandla 1359 KM	Rudrapur 15 KM
Pithampur	Madhya Pradesh	17 KM	Indore 31 KM	NH 3	JNPT 441 KM	Indore 20 KM
Haridwar	Uttarakhand	20 KM	Haridwar 5-20 KM	NH 58	Kolkata 1491 KM	Dehradun 41 KM

Paper & Packaging Location Intelligence: Geographical Input



LOCATION



STATE



CLOSEST AIRPORT



CLOSEST TRAIN STATION



HIGHWAY (NATIONAL / STATE)



NEAREST PORT



NEAREST CITY



PACKAGING

LOCATION	STATE	CLOSEST AIRPORT	CLOSEST TRAIN STATION	HIGHWAY (NATIONAL / STATE)	NEAREST PORT	NEAREST CITY
Ponda	Goa	31 KM	Margao 20 KM	NH 4 A	Mormugao 37 KM	Panjim 31 KM
Guwahati	Assam	5-20 KM	Guwahati 5-20 KM	NH 40	Haldia 1122 KM	Guwahati
Vizag	Visakhapatnam	5-20 KM	Vizag 5-20 KM	NH 16	Vizag 5-20 KM	Vizag
Kolkata	West Bengal	5-20 KM	Kolkata 5-20 KM	NH 2	Kolkata	Kolkata
Hubli	Karnataka	5-20 KM	Hubli 5-20 KM	NH 67	Mangalore 367 KM	Belgaum 92 KM
Baddi	Himachal Pradesh	55 KM	Chandigarh 41 KM	NH 105	Kandla 1383 KM	Chandigarh 37 KM
Ahmedabad	Gujarat	5-20 KM	Ahmedabad 5-20 KM	NE 1	Kandla 298 KM	Gandhinagar 27 KM
Raigad	Maharashtra	109 KM	Raigad 5-20 KM	NH 4	JNPT 69 KM	Panvel 65 KM
Bengaluru	Karnataka	5-20 KM	Bengaluru 5-20 KM	NH 75	Mangalore 351 KM	Bengaluru
Hosur	Tamil Nadu	74 KM	Bengaluru 74 KM	NH 44	Chennai 312 KM	Bengaluru 40 KM
Hyderabad	Telangana	5-20 KM	Hyderabad 5-20 KM	NH 65	Vizag 650 KM	Hyderabad
New Delhi	Delhi	35 KM	HNZ 33 KM	NH 24	Kandla 1105 KM	Gurugram 24 KM
Thane	Maharashtra	37 KM	Mumbai 37 KM	SH 42	JNU 47 KM	Mumbai 24 KM
Solan	Himachal Pradesh	20 KM	Shimla 5- 30 KM	NH 5	Kandla 1424 KM	Shimla 50 KM
Vapi	Gujarat	85 KM	Vapi 5-20 KM	NH 8	Kandla 653 KM	Surat 67 KM
Nashik	Maharashtra	5-20 KM	Nashik 5-20 KM	NH 3	Mumbai 180 KM	Nashik
Aurangabad	Maharashtra	5-20 KM	Aurangabad 5-20 KM	SH 16	JNPT 350 KM	Aurangabad
Pune	Maharashtra	5-20 KM	Pune 5-20 KM	NH 48	JNPT 140 KM	Pune
Daman	Daman & Diu	128 KM	Vapi 12 km	NH 48	Mumbai 200 KM	Vapi 12 KM
Gangtok	Shimla	5-20 KM	Gangtok 5-20 KM	NH 10	Kandla 2434 KM	Gangtok
Satara	Maharashtra	120 KM	Satara 5-20 KM	NH 761	JNPT 186 KM	Pune 120 KM

Paper & Packaging Location Intelligence: Developmental Parameters



LOCATION



GOVERNANCE



PHYSICAL DEVELOPMENT



SOCIAL DEVELOPMENT



EASE OF LIVING



AIR QUALITY



TELECOM NETWORK



PAPER

LOCATION	GOVERNANCE	PHYSICAL DEVELOPMENT	SOCIAL DEVELOPMENT	EASE OF LIVING	AIR QUALITY	TELECOM NETWORK
Chennai (TN)	Grade A	Grade A	Grade A	Grade A	Average	Voice: Excellent, Data: Good
Hyderabad (TS)	Grade A	Grade B	Grade B	Grade B	Average	Voice: Excellent, Data: Excellent
Kolkata (WB)	Grade C	Grade C	Grade A	Grade B	Average	Voice: Excellent, Data: Excellent
Rayagada Sewa, Jeypore (OR)	Grade C	Grade C	Grade A	Grade C	Below Average	Voice: Excellent, Data: Good
Ahmedabad (GJ)	Grade A	Grade A	Grade C	Grade A	Average	Voice: Excellent, Data: Excellent
Pune (Ashti,Bhigwan,Maval)(MH)	Grade A	Grade A	Grade A	Grade A	Average	Voice: Excellent, Data: Excellent
East Godavari (AP)	Grade A	Grade B	Grade A	Grade B	Good	Voice: Poor, Data: Good
Silvassa (DN)	Grade A	Grade A	Grade C	Grade A	Average	Voice: Excellent, Data: Excellent
Vapi (GJ)	Grade A	Grade A	Grade C	Grade A	Average	Voice: Excellent, Data: Excellent



PACKAGING

Faridabad (HN)	Grade D	Grade D	Grade D	Grade D	Below Average	Voice: Excellent, Data: Excellent
Kolkata (WB)	Grade C	Grade C	Grade A	Grade B	Average	Voice: Excellent, Data: Good
Mumbai (MH)	Grade A	Grade A	Grade A	Grade A	Average	Voice: Excellent, Data: Excellent
Chennai (TN)	Grade A	Grade A	Grade A	Grade A	Average	Voice: Excellent, Data: Good
Chittoor (AP)	Grade A	Grade B	Grade A	Grade B	Good	Voice: Excellent, Data: Excellent
Vadodara (GJ)	Grade B	Grade B	Grade C	Grade B	Average	Voice: Excellent, Data: Excellent
Silvassa (DNH)	Grade E	Grade E	Grade D	Grade E	Average	Voice: Excellent, Data: Excellent
US Nagar (UK)	Grade A	Grade B	Grade C	Grade B	Average	Voice: Good, Data: Good
Pithampur (MP)	Grade A	Grade B	Grade A	Grade A	Average	Voice: Excellent, Data: Excellent
Haridwar (UK)	Grade A	Grade B	Grade C	Grade B	Good	Voice: Excellent, Data: Excellent

Paper & Packaging Location Intelligence: Developmental Parameters



LOCATION



GOVERNANCE



PHYSICAL
DEVELOPMENT



SOCIAL
DEVELOPMENT



EASE OF
LIVING



AIR
QUALITY



TELECOM NETWORK



PACKAGING

LOCATION	GOVERNANCE	PHYSICAL DEVELOPMENT	SOCIAL DEVELOPMENT	EASE OF LIVING	AIR QUALITY	TELECOM NETWORK
Ponda (GA)	Grade E	Grade E	Grade E	Grade E	Average	Voice : Excellent, Data : Good
Guwahati (AS)	Grade C	Grade D	Grade C	Grade D	Average	Voice: Excellent, Data: Excellent
Vizag (AP)	Grade A	Grade A	Grade C	Grade A	Average	Voice: Excellent, Data: Good
Kolkata (WB)	Grade C	Grade C	Grade A	Grade B	Average	Voice: Excellent, Data: Good
Hubli (KA)	Grade B	Grade C	Grade C	Grade C	Good	Voice: Excellent, Data Good
Baddi (HP)	Grade B	Grade A	Grade A	Grade A	Average	Voice: Excellent, Data: Excellent
Ahmedabad (GJ)	Grade A	Grade A	Grade C	Grade A	Average	Voice: Excellent, Data: Excellent
Raigad (MH)	Grade A	Grade A	Grade B	Grade A	Average	Voice: Excellent Data: Good
Bengaluru (KA)	Grade B	Grade C	Grade D	Grade C	Below Average	Voice: Excellent, Data: Excellent
Hosur (KA)	Grade A	Grade C	Grade D	Grade C	Average	Voice: Excellent Data: Excellent
Hyderabad (TS)	Grade A	Grade B	Grade B	Grade B	Average	Voice: Excellent, Data: Excellent
New Delhi (DL)	Grade D	Grade D	Grade D	Grade D	Below Average	Voice: Excellent, Data: Excellent
Thane (MH)	Grade A	Grade A	Grade A	Grade A	Average	Voice: Excellent, Data: Excellent
Solan (HP)	Grade A	Grade B	Grade B	Grade A	Good	Voice: Excellent, Data: Excellent
Vapi (GJ)	Grade A	Grade A	Grade C	Grade A	Average	Voice: Excellent, Data: Excellent
Nashik (MH)	Grade A	Grade A	Grade B	Grade A	Average	Voice: Excellent, Data: Excellent
Aurangabad (MH)	Grade A	Grade A	Grade A	Grade A	Average	Voice: Excellent, Data: Excellent
Pune (MH)	Grade A	Grade A	Grade A	Grade A	Average	Voice: Excellent Data: Good
Daman (D&D)	Grade A	Grade A	Grade C	Grade B	Average.	Voice: Excellent, Data: Excellent
Gangtok (SK)	Grade C	Grade C	Grade C	Grade C	Average	Voice: Excellent, Data: Excellent
Satara (MH)	Grade A	Grade A	Grade A	Grade A	Average	Voice: Excellent, Data: Excellent

Paper & Packaging Location Intelligence: Industrial Ecosystem



LOCATION



LIST OF MAJOR COMPANIES



AVAILABILITY OF RAW MATERIALS*



PAPER

Chennai (TN)	Tamil Nadu Newsprint & Papers Ltd., Honicel india Pvt Ltd., Mihir International	✓
Hyderabad (TS)	International Paper APPM Ltd., Wings Paper and Board Mills Pvt. Ltd..	✓
Kolkata (WB)	The West Coast Paper Mills Ltd. (SKB), Emami Paper Mills Ltd..	✓
Rayagada Sewa, Jeypore (OR)	JK Paper Ltd., Ballarpur Industries Ltd.. (Avantha)	✓
Ahmedabad (GJ)	Kushal Ltd., Packwill Packaging Gujarat Packaging Industries, Sac Industries	✓
Pune (Ashti,Bhigwan,Maval) (MH)	Ballarpur Industries Ltd.. (Avantha), Ganga Papers India Ltd..	✓
East Godavari (AP)	International Paper APPM Ltd..	✓
Silvassa (DN)	TCPL Packaging Ltd..	✓
Vapi (GJ)	Siddhi Saw Mill, Pranav Raj Paper Mills Pvt Ltd., Nathani Paper Mills Ltd..	✓



PACKAGING

Faridabad (HN)	Balmer Lawrie & Co. Ltd., Asian Packing Machinery	✓
Kolkata (WB)	Balmer Lawrie & Co. Ltd., TGP Packaging	✓
Mumbai (MH)	Balmer Lawrie & Co. Ltd., Essel Propack, Kris Flexipack Pv, Huhtamaki PPL Ltd..	✓
Chennai (TN)	Balmer Lawrie & Co. Ltd..	✓
Chittoor (AP)	Balmer Lawrie & Co. Ltd..	✓
Vadodara (GJ)	Balmer Lawrie & Co. Ltd. , Cosmo Films	✓
Silvassa (DNH)	Balmer Lawrie & Co. Ltd., TCPL Packaging Ltd., Time Technoplast Ltd., Huhtamaki PPL Ltd., Parekh Aluminex	✓
US Nagar (UK)	Ester Industries Ltd., Flexituff Ventures International Ltd., Polyplex Corporation Ltd., Huhtamaki PPL Ltd..	✓
Pithampur (MP)	Flexituff Ventures International Ltd..	✓
Haridwar (UK)	TCPL Packaging Ltd..	✓

* AVAILABILITY OF PAPER & PULP AS RAW MATERIALS

Paper & Packaging Location Intelligence: Industrial Ecosystem



LOCATION



LIST OF MAJOR COMPANIES



AVAILABILITY OF RAW MATERIALS*



PACKAGING

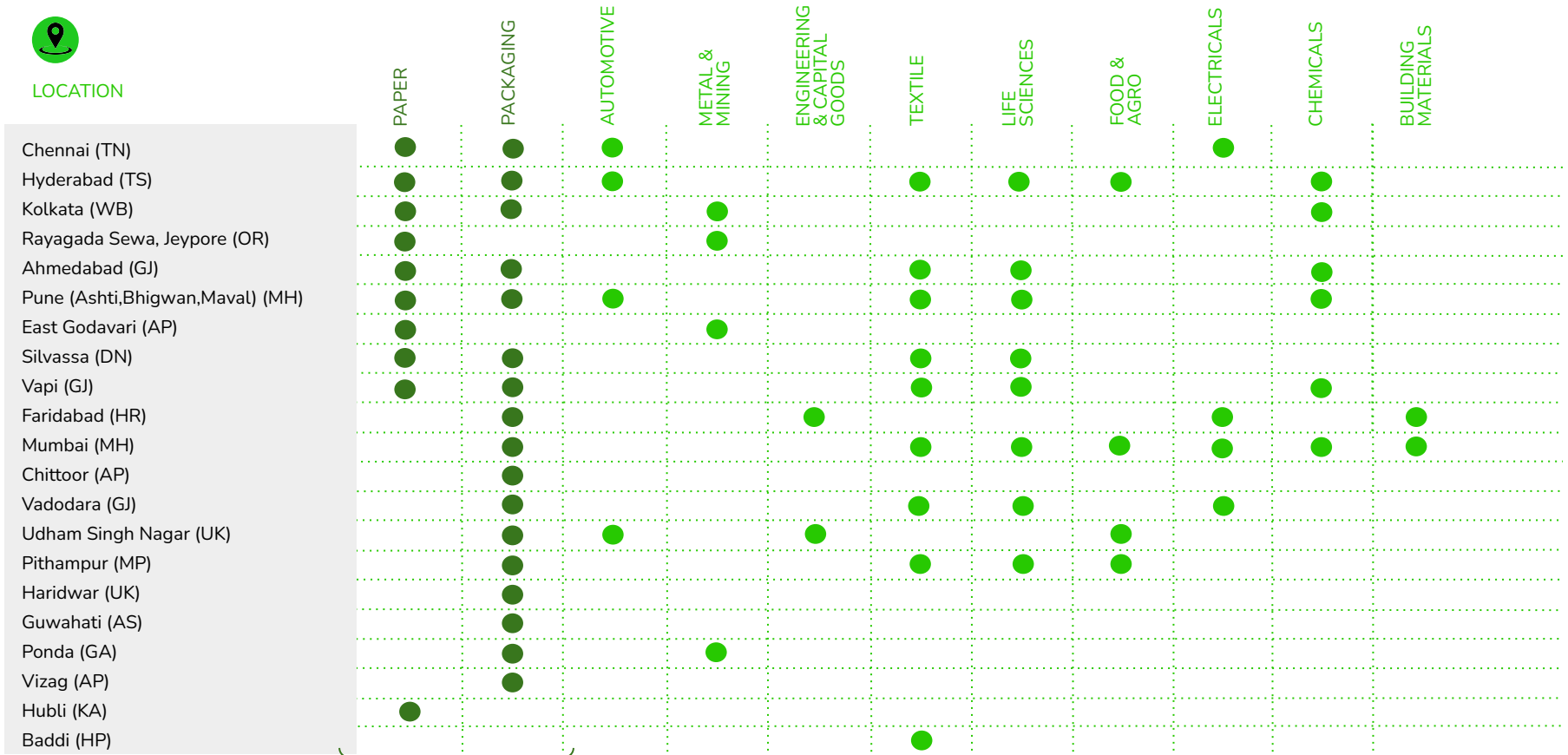
Ponda (GA)	TCPL Packaging Ltd..	✓
Guwahati (AS)	TCPL Packaging Ltd., Huhtamaki PPL Ltd., Parksons Packaging Ltd..	✓
Vizag (AP)	Time Technoplast Ltd..	✓
Kolkata (WB)	Time Technoplast Ltd..	✓
Hubli (KA)	Time Technoplast Ltd..	✓
Baddi (HP)	Time Technoplast Ltd..	✓
Ahmedabad (GJ)	Time Technoplast Ltd..	✓
Raigad (MH)	Time Technoplast Ltd., Huhtamaki PPL Limited, ORICON ENTERPRISES	✓
Bengaluru (KA)	Time Technoplast Ltd., Huhtamaki PPL Limited	✓
Hosur (KA)	Time Technoplast Ltd..	✓
Hyderabad (TS)	Time Technoplast Ltd., Huhtamaki PPL Limited	✓
New Delhi (DL)	Uflex Ltd..	✓
Thane (MH)	Essel Propack Ltd., Huhtamaki PPL Limited, ORICON ENTERPRISES	✓
Solan (HP)	Essel Propack Ltd., Huhtamaki PPL Limited	✓
Vapi (GJ)	Essel Propack Ltd., Westrock, Kris Flexipack Pv	✓
Nashik (MH)	Jindal Polyfilms	✓
Aurangabad (MH)	Cosmo Films	✓
Pune (MH)	Westrock, Amcor, Parksons Packaging Ltd.	✓
Daman (D&D)	Parksons Packaging Ltd.	✓
Gangtok (SK)	Huhtamaki PPL Ltd.	✓
Satara (MH)	ACG	✓

* AVAILABILITY OF PAPER & PULP AS RAW MATERIALS

Paper & Packaging Location Intelligence: Co located Industries



LOCATION



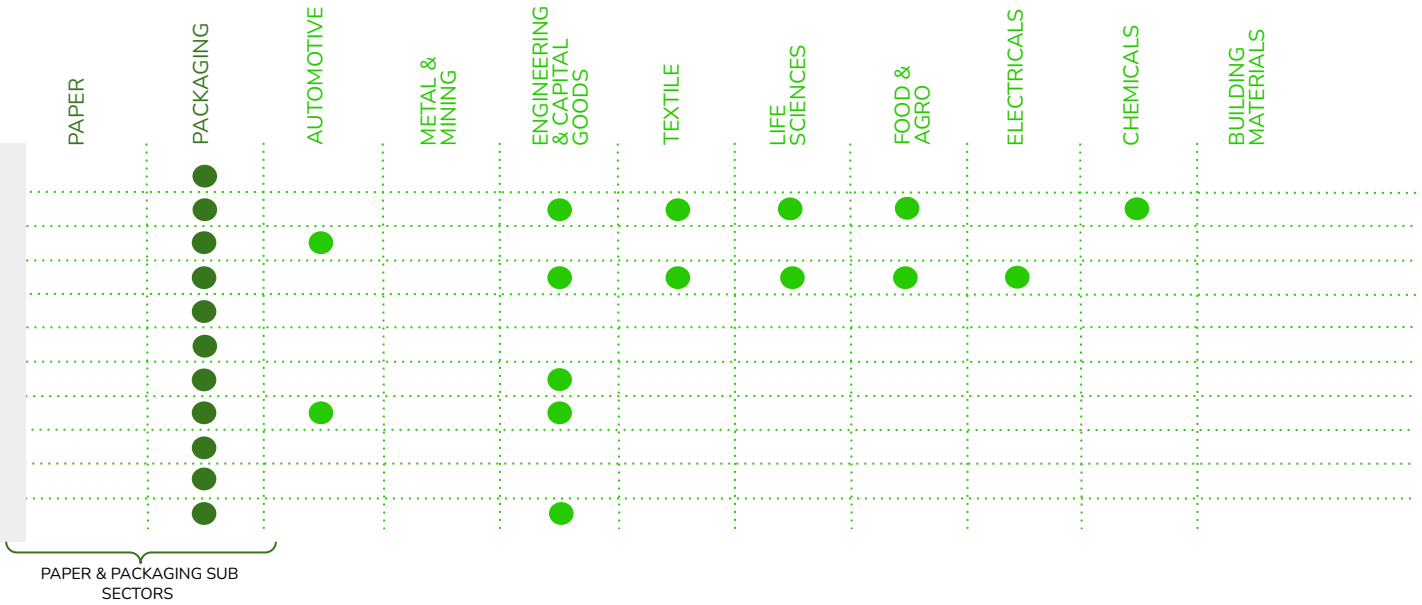
PAPER & PACKAGING SUB SECTORS

Paper & Packaging Location Intelligence: Co located Industries



LOCATION

- Raigad (MH)
- Bengaluru (KA)
- Hosur (TN)
- New Delhi (DL)
- Thane (MH)
- Solan (HP)
- Nashik (MH)
- Aurangabad (MH)
- Daman (DD)
- Gangtok (SK)
- Satara (MH)



Paper & Packaging Location Intelligence: Some Global Companies Manufacturing in India



Key areas covered in this section of the report include:

A. For the Paper & Packaging industry:

- a. Workforce pyramid
- b. Local language proficiency
- c. STEM and business/ management education levels in workforce
- d. Digital proficiency in the workforce
- e. Location satisfaction, willingness to migrate and influencing factors

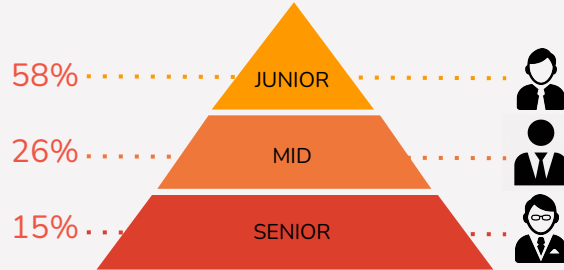
B. For various sub-sectors of the Paper & Packaging industry:

- f. Workforce pyramid for each function
- g. Education insights for each function and seniority level
- h. Median salaries for each function and seniority level



The Paper & Packaging Workforce Insights

Paper & Packaging manufacturing workforce: % of seniority levels



78% of manufacturing professionals in the Paper & Packaging industry **speak the local language**

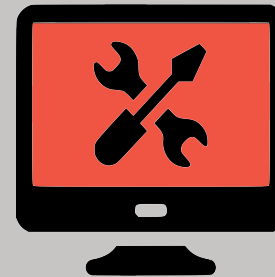


56% of the manufacturing workforce in Paper & Packaging consists of **STEM graduates**

50% of the manufacturing workforce in Paper & Packaging consists of **Business/ Management Graduates**



(STEM: Science, Technology, Engineering & Mathematics)



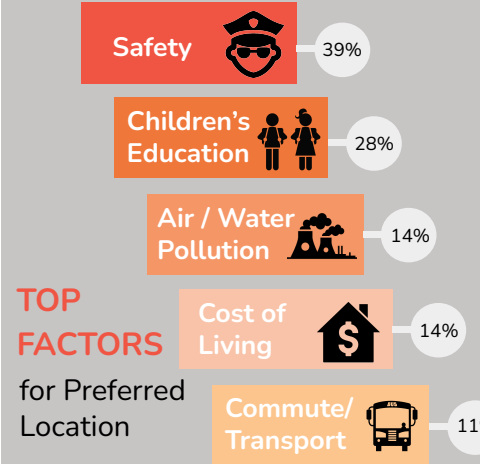
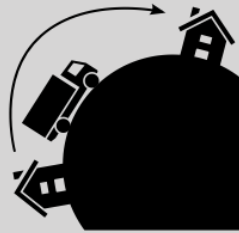
78% of manufacturing professionals in the Paper & Packaging industry are **adept at using digital tools**

Paper & Packaging Workforce Insights

83% of manufacturing professionals in the Paper & Packaging industry are 'Extremely' or 'Very satisfied' with their current city of residence




81% of manufacturing professionals in Paper & Packaging are willing to relocate



39% chose **Safety** as the most important factors when considering relocation, followed by **Children's Education, Air / Water Pollution, Cost of Living & Local Transport**

TOP FACTORS for Preferred Location

Workforce Insights : Pyramid; Education & Salaries




PAPER

FUNCTION	LEVEL	WORKFORCE PYRAMID	* POST GRADUATE +	SALARY (Median in INR)	SALARY (Median in USD)
Corporate Finance	Junior	41%	75%	₹864,000	\$10,800
	Mid	25%	85%	₹2,040,000	\$25,500
	Senior	33%	84%	₹3,720,000	\$46,500
Corporate HR	Junior	40%	73%	₹920,000	\$11,500
	Mid	22%	84%	₹1,897,500	\$23,719
	Senior	38%	86%	₹3,450,000	\$43,125
EHS	Junior	45%	42%	₹707,250	\$8,841
	Mid	28%	54%	₹1,725,000	\$21,563
	Senior	27%	70%	₹3,105,000	\$38,813
General Management	Junior	32%	56%	₹774,000	\$9,675
	Mid	20%	62%	₹1,680,000	\$21,000
	Senior	47%	72%	₹3,600,000	\$45,000
IT Support	Junior	62%	41%	₹972,000	\$12,150
	Mid	19%	57%	₹1,980,000	\$24,750
	Senior	19%	62%	₹3,480,000	\$43,500
Legal	Junior	44%	62%	₹845,250	\$10,566
	Mid	22%	80%	₹1,782,500	\$22,281
	Senior	34%	76%	₹3,105,000	\$38,813

* PERCENTAGE OF WORKFORCE WITH A POSTGRADUATE DEGREE OR ABOVE AT THAT LEVEL

Workforce Insights : Pyramid; Education & Salaries



PAPER

FUNCTION	LEVEL	WORKFORCE PYRAMID	* POST GRADUATE +	SALARY (Median in INR)	SALARY (Median in USD)
Marketing	Junior	63%	39%	₹972,000	\$12,150
	Mid	18%	55%	₹1,980,000	\$24,750
	Senior	19%	58%	₹3,420,000	\$42,750
Operations	Junior	52%	75%	₹920,000	\$11,500
	Mid	33%	68%	₹1,552,500	\$19,406
	Senior	15%	74%	₹2,760,000	\$34,500
Plant Finance	Junior	37%	74%	₹745,200	\$9,315
	Mid	27%	82%	₹1,840,000	\$23,000
	Senior	36%	81%	₹3,507,500	\$43,844
Plant HR	Junior	43%	60%	₹741,750	\$9,272
	Mid	24%	70%	₹1,725,000	\$21,563
	Senior	33%	72%	₹3,450,000	\$43,125
Production/ Maintenance	Junior	52%	73%	₹977,500	\$12,219
	Mid	32%	69%	₹1,667,500	\$20,844
	Senior	15%	68%	₹2,990,000	\$37,375
Purchase/ Procurement	Junior	49%	50%	₹977,500	\$12,219
	Mid	24%	58%	₹1,667,500	\$20,844
	Senior	27%	63%	₹3,220,000	\$40,250

* PERCENTAGE OF WORKFORCE WITH A POSTGRADUATE DEGREE OR ABOVE AT THAT LEVEL

Workforce Insights : Pyramid; Education & Salaries


FUNCTION	LEVEL	WORKFORCE PYRAMID	* POST GRADUATE +	SALARY (Median in INR)	SALARY (Median in USD)
Quality	Junior	53%	73%	₹920,000	\$11,500
	Mid	30%	74%	₹1,552,500	\$19,406
	Senior	17%	69%	₹2,702,500	\$33,781
R & D	Junior	57%	65%	₹862,500	\$10,781
	Mid	24%	82%	₹1,380,000	\$17,250
	Senior	19%	90%	₹2,702,500	\$33,781
Sales	Junior	59%	42%	₹808,800	\$10,110
	Mid	20%	61%	₹1,920,000	\$24,000
	Senior	21%	62%	₹3,480,000	\$43,500
Strategy	Junior	38%	72%	₹947,760	\$11,847
	Mid	24%	79%	₹1,680,000	\$21,000
	Senior	38%	85%	₹3,420,000	\$42,750
Supply Chain & Logistics	Junior	46%	55%	₹960,000	\$12,000
	Mid	26%	68%	₹1,680,000	\$21,000
	Senior	28%	71%	₹3,300,000	\$41,250



PAPER


* PERCENTAGE OF WORKFORCE WITH A POSTGRADUATE DEGREE OR ABOVE AT THAT LEVEL

Workforce Insights : Pyramid; Education & Salaries

	FUNCTION	LEVEL	WORKFORCE PYRAMID	* POST GRADUATE +	SALARY (Median in INR)	SALARY (Median in USD)
 PACKAGING	Corporate Finance	Junior	36%	85%	₹1,020,000	\$12,750
		Mid	30%	87%	₹1,680,000	\$21,000
		Senior	33%	85%	₹3,060,000	\$38,250
	Corporate HR	Junior	39%	88%	₹805,000	\$10,063
		Mid	31%	82%	₹1,610,000	\$20,125
		Senior	30%	69%	₹2,875,000	\$35,938
	EHS	Junior	39%	54%	₹690,000	\$8,625
		Mid	25%	73%	₹1,322,500	\$16,531
		Senior	35%	70%	₹2,760,000	\$34,500
	General Management	Junior	32%	74%	₹954,000	\$11,925
		Mid	28%	83%	₹2,040,000	\$25,500
		Senior	41%	83%	₹4,080,000	\$51,000
IT Support	Junior	57%	53%	₹600,000	\$7,500	
	Mid	24%	67%	₹1,320,000	\$16,500	
	Senior	19%	72%	₹2,220,000	\$27,750	
Legal	Junior	36%	76%	₹690,000	\$8,625	
	Mid	29%	82%	₹1,437,500	\$17,969	
	Senior	35%	82%	₹2,645,000	\$33,063	


* PERCENTAGE OF WORKFORCE WITH A POSTGRADUATE DEGREE OR ABOVE AT THAT LEVEL

Workforce Insights : Pyramid; Education & Salaries

 PACKAGING	FUNCTION	LEVEL	WORKFORCE PYRAMID	* POST GRADUATE +	SALARY (Median in INR)	SALARY (Median in USD)
	Marketing	Junior	54%	57%	₹720,000	\$9,000
		Mid	24%	68%	₹1,800,000	\$22,500
		Senior	22%	73%	₹3,300,000	\$41,250
	Operations	Junior	53%	52%	₹632,500	\$7,906
		Mid	27%	67%	₹1,322,500	\$16,531
		Senior	20%	70%	₹2,616,250	\$32,703
	Plant Finance	Junior	40%	77%	₹747,500	\$9,344
		Mid	28%	79%	₹1,610,000	\$20,125
		Senior	32%	81%	₹2,760,000	\$34,500
Plant HR	Junior	44%	68%	₹632,500	\$7,906	
	Mid	27%	73%	₹1,380,000	\$17,250	
	Senior	29%	79%	₹2,070,000	\$25,875	
Production/ Maintenance	Junior	61%	42%	₹615,250	\$7,691	
	Mid	21%	59%	₹1,247,750	\$15,597	
	Senior	18%	65%	₹2,794,500	\$34,931	
Purchase/ Procurement	Junior	47%	61%	₹603,750	\$7,547	
	Mid	28%	68%	₹1,380,000	\$17,250	
	Senior	25%	72%	₹3,116,500	\$38,956	

* PERCENTAGE OF WORKFORCE WITH A POSTGRADUATE DEGREE OR ABOVE AT THAT LEVEL

Workforce Insights : Pyramid; Education & Salaries

 PACKAGING	FUNCTION	LEVEL	WORKFORCE PYRAMID	* POST GRADUATE +	SALARY (Median in INR)	SALARY (Median in USD)
	Quality	Junior	59%	47%	₹701,500	\$8,769
		Mid	21%	63%	₹1,224,750	\$15,309
		Senior	20%	68%	₹2,386,250	\$29,828
	R & D	Junior	57%	60%	₹632,500	\$7,906
		Mid	25%	68%	₹1,420,250	\$17,753
		Senior	18%	75%	₹2,921,000	\$36,513
	Sales	Junior	47%	66%	₹720,000	\$9,000
		Mid	27%	73%	₹1,680,000	\$21,000
		Senior	25%	74%	₹2,880,000	\$36,000
Strategy	Junior	35%	83%	₹1,035,600	\$12,945	
	Mid	29%	88%	₹1,980,000	\$24,750	
	Senior	36%	84%	₹3,780,000	\$47,250	
Supply Chain & Logistics	Junior	42%	62%	₹720,000	\$9,000	
	Mid	28%	75%	₹1,560,000	\$19,500	
	Senior	30%	77%	₹2,940,000	\$36,750	

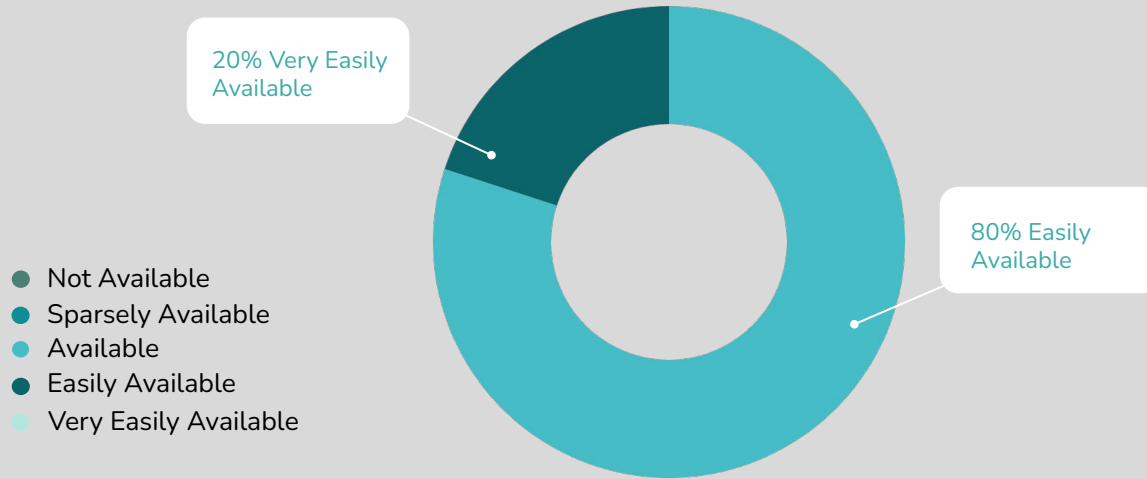
* PERCENTAGE OF WORKFORCE WITH A POSTGRADUATE DEGREE OR ABOVE AT THAT LEVEL

Key areas covered in this section of the report include:

- a. Availability of white-collar workforce in the paper & packaging industry
- b. Availability of skills and competencies amongst the workforce:
 - i. Technical
 - ii. Digital
 - iii. Behavioral
 - iv. Interpersonal
 - v. Leadership
- c. Average salary increments
- d. Companies exporting produce
- e. Share of On-roll and Off-roll employees
- f. Insights into outsourcing blue-collar workforce
- g. Training and development costs
- h. Employee ratings of work environment, location parameters and factors influencing job change



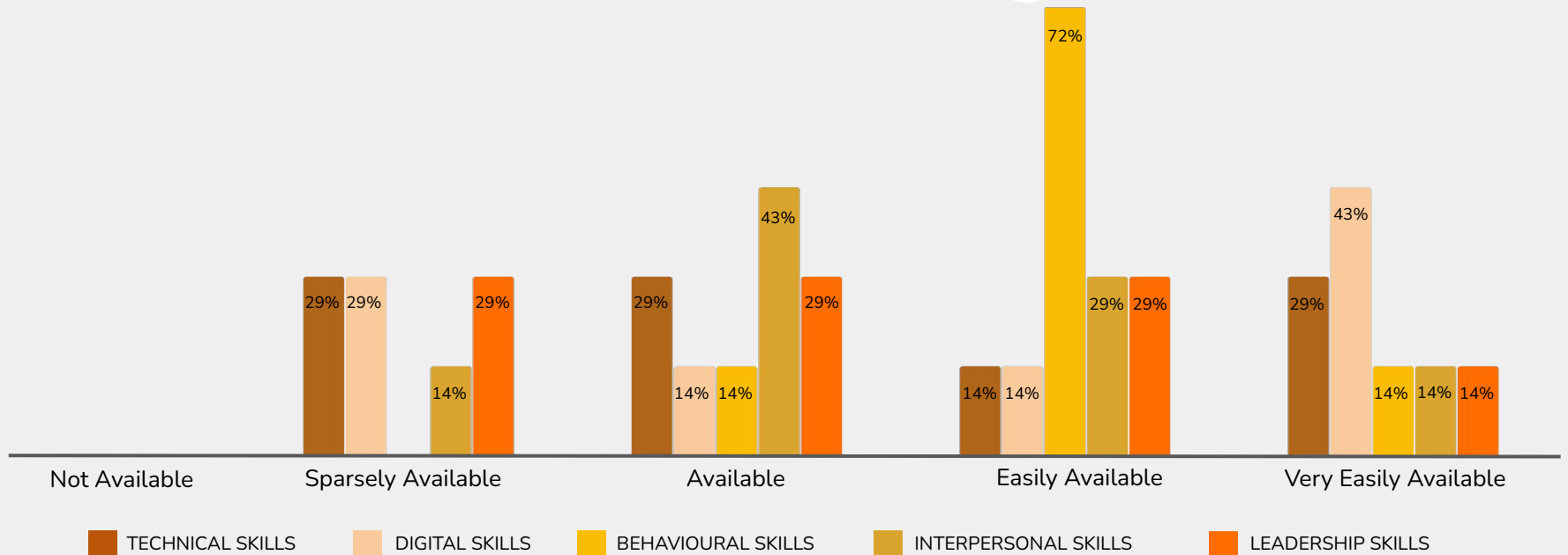
Industry Insights: Availability of White Collar Workforce



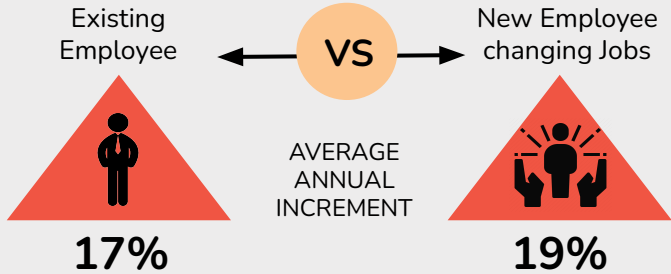
80% HR Heads agree that **White Collar Workforce is Easily Available** in the Paper & Packaging Industry

Industry Insights: Availability of Skills & Competencies

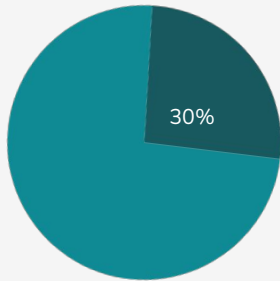
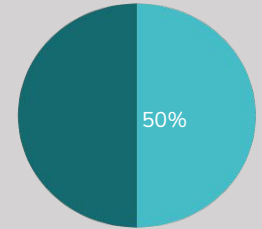
- All skills were reported as 'Easily Available' OR 'Very Easily Available' by most respondents
- A majority of respondents reported Behavioural Skills as 'Easily Available'
- None of the skills were reported as 'Not Available'



Industry Insights: Workforce Intelligence



50% of companies in the Paper & Packaging industry export their produce



70% of manufacturing professionals in Paper & Packaging are on-roll employees



90%

% of Companies that have **In-State White Collar Workforce**



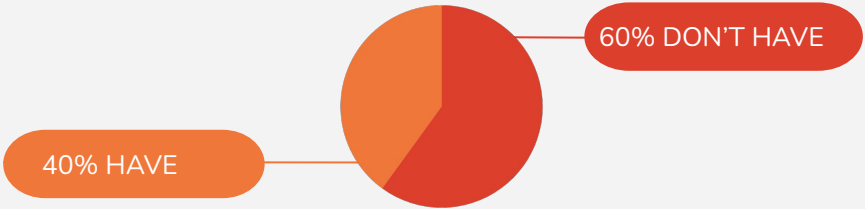
70%

% of Companies that have **Outsourced Blue Collar Workforce**

Industry Insights: **Workforce Intelligence**



100% of Paper & Packaging manufacturing players don't face any issue in **outsourcing blue collar workforce**



40% the plants in the Paper & Packaging industry have a worker's union



On an average, **10%** of the manpower cost is dedicated to training

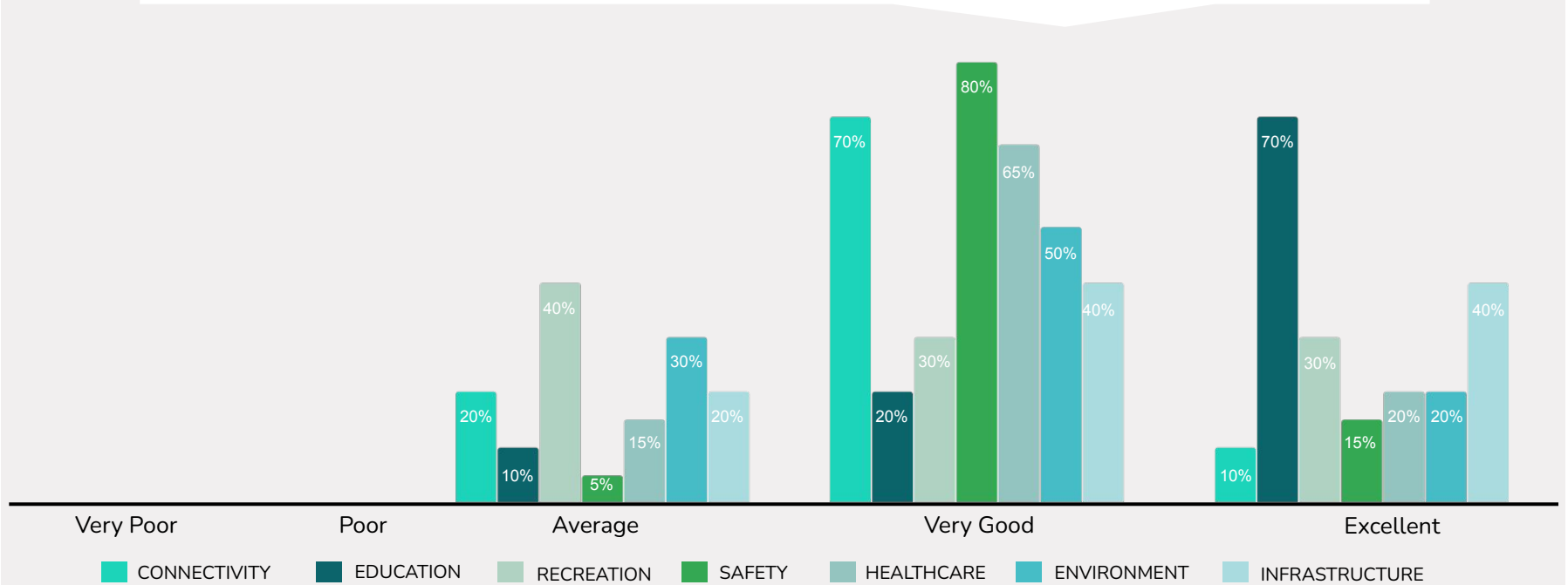


Employees' rating of the **work environment** in the Paper & Packaging industry



Industry Insights: Ratings on Location Specific Parameters

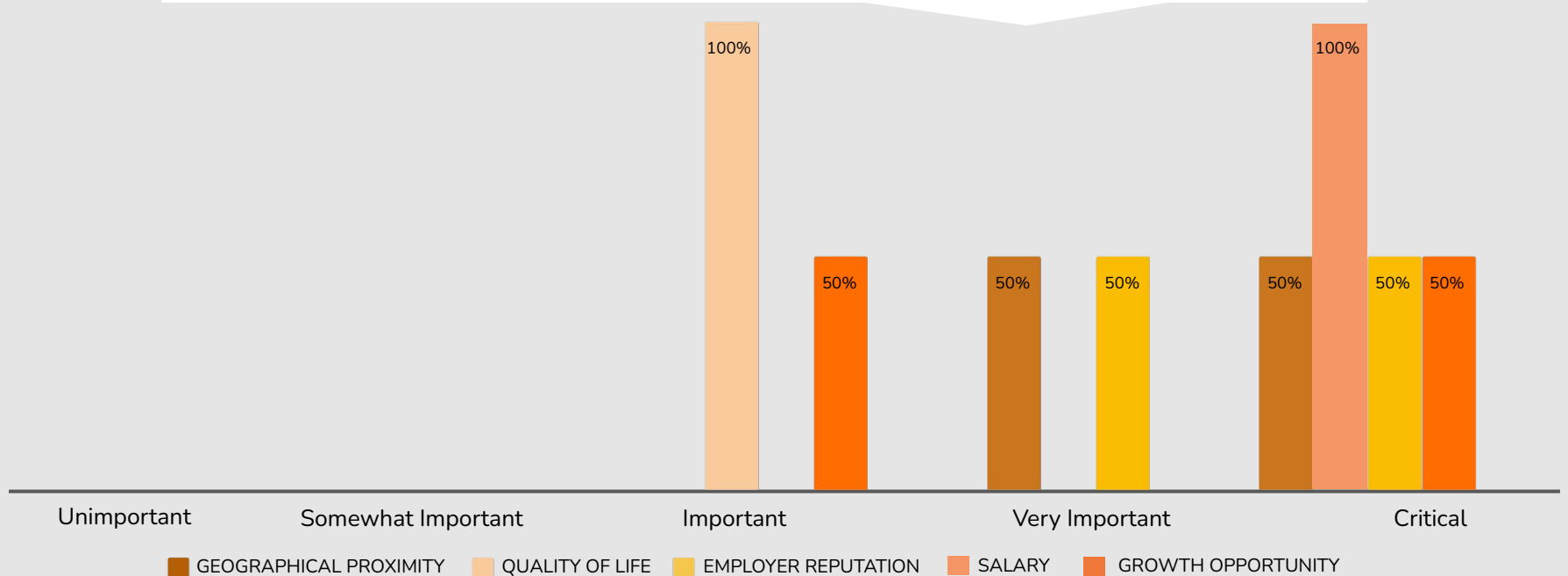
- All parameters were reported as 'Very Good' OR 'Excellent'
- A majority of respondents reported Safety as 'Very Good', and Education as 'Excellent'



* Source: These Ratings have been collected in conversation with HR Heads with deep insights into employee satisfaction

Industry Insights: Ratings on Employee Centric Parameters

- All factors were reported to be 'Very Important' OR 'Critical'
- None of the factors were reported as 'Unimportant' or 'Somewhat Important'
- Salary was reported as 'Critical' by all respondents



* Source: These Ratings have been collected in conversation with HR Heads with deep insights into employee satisfaction



About Us

Your True Talent Partner

Catenon is a global executive search and talent consulting & intelligence firm. We have more than a decade of experience in India serving more than 200 clients across industry sectors and delivering more than 3,000 searches.

We have presence across Bengaluru, Gurugram, Mumbai and Pune, with a best-in-class team of over 70 consultants. Our global reach and expertise has helped our clients to hire key talent in over 100 countries globally. We leverage our innovative technology platform to deliver fully analyzed reports including video interviews of candidate, to enable faster and more informed decision making, even with globally dispersed hiring.

We lead the way as the partner of choice in the digital transformation journey of the recruitment organization for enterprises across the planet. Through our assessment solutions and competency framework, we examine future readiness for both jobs and people.

Catenon's talent intelligence provides unparalleled data driven insight into industry, function and levels. At Catenon, we love to solve problems!

Our mission- "We want to be the finest talent search and consulting firm in India; both for our clients and our employees. Our work must stand for excellence and must become the benchmark for the industry. We want to make a positive impact on each human life we touch, and become the best version of ourselves!"

Talent Acquisition

- Executive Search
- Interim Management
- Recruitment Process Outsourcing
- Project Recruitment
- International Recruitment

Talent Consulting & Intelligence

- Assessments
- Succession planning
- Industry intelligence
- Talent Mapping
- Salary Benchmarking

Market Entry Assistance

- Incorporation of company
- Industry intelligence
- Salary Benchmarking
- Turnkey project to set up office

INDUSTRIES WE SERVE

- Agribusiness
- Consumer
- Education & Social Impact
- Financial
- Industrial
- Life Sciences
- Private Equity & Venture Capital
- Services
- Technology & Communications

12+

Years of Experience

200+

Active Clients

3000+

Searches

70+

Consultants

Appendix

State names and abbreviations

Andhra Pradesh	AP	Orissa	OR
Arunachal Pradesh	AR	Punjab	PB
Assam	AS	Rajasthan	RJ
Bihar	BR	Sikkim	SK
Chhattisgarh	CG	Tamil Nadu	TN
Goa	GA	Telangana	TS
Gujarat	GJ	Tripura	TR
Haryana	HR	Uttarakhand	UK
Himachal Pradesh	HP	Uttar Pradesh	UP
J & K	JK	West Bengal	WB
Jharkhand	JH	Andaman and Nicobar Islands	AN
Karnataka	KA	Chandigarh	CH
Kerala	KL	Dadra and Nagar Haveli	DH
Madhya Pradesh	MP	Daman & Diu	DD
Maharashtra	MH	Delhi	DL
Manipur	MN	Ladakh	LA
Meghalaya	ML	Lakshadweep	LD
Mizoram	MZ	Pondicherry	PY
Nagaland	NL		

Conversion Rate

\$1 = 80 INR



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THANK YOU

We look forward to working with you

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