台灣紙業界之現況及未來的展望

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Status and Outlook of Taiwan's Paper Industry

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The author reviews the statistics of Taiwan's paper industry, pointing out although pulp production is minute, and the paper and board industry ranked 16th in production and 13th in consumption in the world. The industry is predominantly packaging grades oriented. Over the years, the industry has aggregated in scales and reduced the number of mills. The industry is facing the problems of limited market, exodus of producers and oversupply, coupled with high environmental protection costs, high land and labor costs and insufficient water supply. Various strategies to enhance competitiveness of the industry and to cope with WTO entry has been offered by the author, which include vertical and horizontal integration of mills, strategic alliance with foreign producers, e-business, mill certifications and accreditations, and active anti-dumping actions etc. The author also provides SWOT analysis of the industry that provide guidance to the future directions of the paper industry.

一、台灣的紙業的現況

（一）紙與紙板產量、使用量

台灣紙及紙板發萌芽自日據時代，產量自民國 36 年的 1.3 萬噸的 20 家規模的產業，漸漸擴大到民國 50 年的 12 萬噸、60 年的 50 萬噸、70 年的 150 萬噸、80 年的 375 萬噸，86 年達最高峰的 450 萬噸，最近幾年則維持在 400 萬~449 萬之間的水準（圖 1），生產總值約佔全國生產毛額的 1% 左右，但 2001 年產業不振，生產總值僅有 804 億 2900 萬，較 2000 年減少 16% 佔全國之 0.84% 。