



**Global and China Viscose Fiber Industry
Report, 2011-2012**

Mar. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include NBS(National Bureau of Statistics of China), WIND . China Custom and Ministry of Agriculture of the People's Republic of China etc.

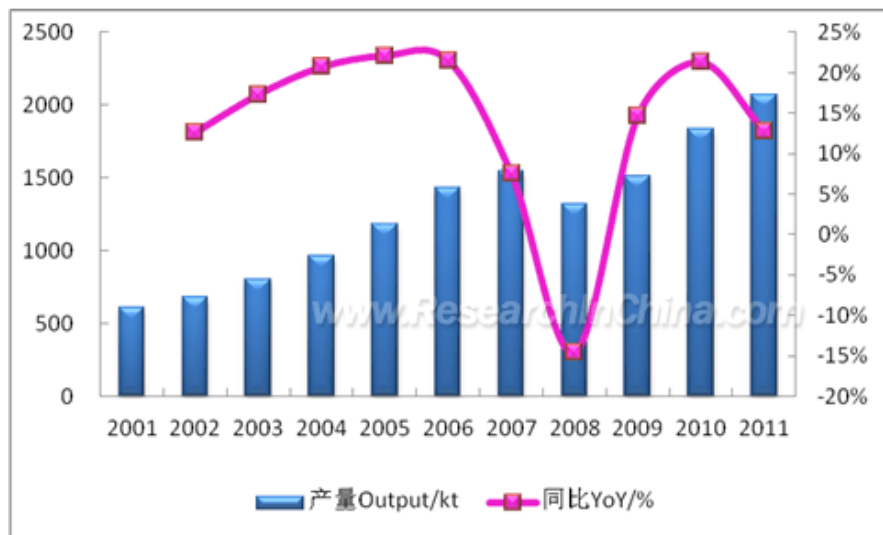
Abstract

As the world's earliest variety of chemical fiber put into industrial production, viscose fiber is made through chemical processing of natural timber, bamboo chips, cotton linters, etc., consisting of viscose filament yarn and viscose staple fiber, of which, the latter accounts for around 90% of the total output of viscose fiber.

In the latest decade, global viscose fiber production grew at a relatively slow pace, with an average annual growth rate (AAGR) of about 5%, climbing 4.7% YoY to 3.392 million tons in 2011, about 60% of which was concentrated in China; other large production areas include ASEAN, Western Europe and India, whose aggregate output occupies approximately 35% of the total.

Being a big producer and consumer of viscose fiber, China has maintained an output growth rate much higher than the global average. In 2001-2011, the AAGR of China's viscose fiber output arrived at 13%; in 2011, the output amounted to 2.069 million tons. Although China's viscose fiber output is huge, most of its varieties are ordinary types, while high tenacity viscose fiber and high wet modulus viscose fiber have relatively small output, especially high-end viscose fiber varieties like Lyocell fiber and Modal fiber which mainly rely on imports.

Output and YoY Growth of Viscose Fiber in China, 2001-2011



Source: National Bureau of Statistics of China; ResearchInChina
《Global and China Viscose Fiber Industry Report, 2011-2012》

China viscose fiber industry features a high concentration ratio, in 2011, top ten manufacturers accounted for 76% of the total viscose fiber capacity nationwide. With a viscose fiber capacity of 480 kilotons in 2011, Zhejiang Fulida Co., Ltd. is the largest viscose fiber producer in China and the third largest in the world.

Jilin Chemical Fiber Co., Ltd. is the largest manufacturer of bamboo pulp fiber in China, with a bamboo staple fiber capacity of 48 kilotons and a bamboo filament yarn capacity of 7 kilotons in 2011; each with a viscose filament yarn capacity of 60 kilotons, Yibin Grace Group and Xinxiang Chemical Fiber Co., Ltd. are China's two largest producers of viscose filament yarn, altogether occupying 38.4% of the total viscose filament yarn capacity nationwide in 2011.

As two giants in global viscose fiber industry, India's Aditya Birla Group and Austria's Lenzing AG respectively realized capacities of 744 kilotons and 710 kilotons in 2010, altogether sharing around 30% of the global total viscose fiber capacity, of which, Lenzing AG enjoys a monopoly position in the fields of Lyocell fiber and Modal fiber.

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