



**Global and China Dissolving Pulp Industry
Report, 2011-2012**

Jun 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 National Bureau of Statistics of China, China Customs and industry association etc.

Abstract

Dissolving pulp is a pulp that has a high cellulose content (>90%), with downstream demand mainly from viscose fibers.

Global dissolving pulp capacity in 2011 was approximately 5.4 million tons, primarily concentrated in North America, South Africa, Brazil and other regions with rich forest resources. The worldwide leading manufacturers include Sappi, Birla, Sateri, Rayonier, Buckeye and Lenzing mainly concerning production of dissolving wood pulp, altogether accounting for about 60% of the world's total capacity of dissolving pulp in 2011.

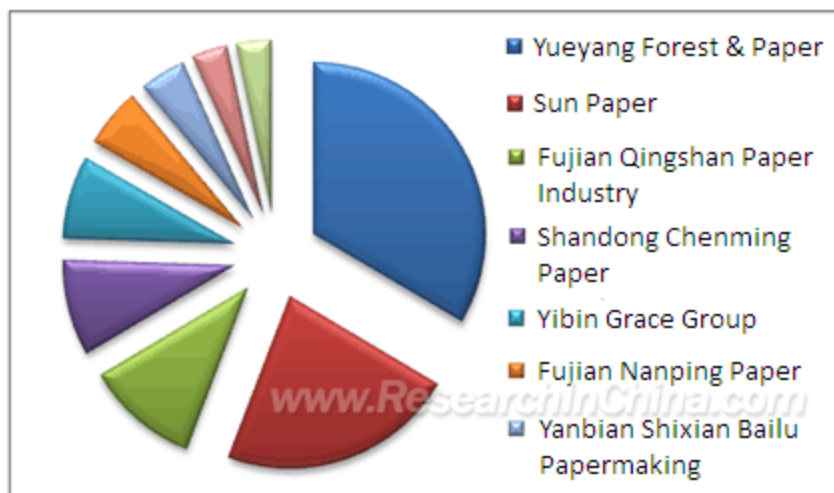
In the context of increased demand and skyrocketing price of dissolving pulp during 2010-2011, global major producers successively planned to raise production capacity, with growth expected to outnumber 2 million tons by 2016. However, considering strict environmental policies abroad as well as the higher density of China's textile industry, the new capacity layout begins to favor China to a large extent.

In 2011, China's dissolving pulp capacity reached 896,000 tons, of which roughly 70% was newly added. Combined with the present 600,000 tons of capacity planned or under construction, China will achieve a total dissolving pulp capacity of around 1.5 million tons once put into operation, thus becoming one of the significant dissolving pulp origins worldwide.

In China, dissolving pulp manufacturers are mainly large and medium-sized paper-making enterprises and chemical fiber enterprises; as for the former, there are mainly Yueyang Forest & Paper, Sun Paper and Fujian Qingshan Paper Industry, with dissolving pulp capacity ranking China's top three positions and altogether sharing 66.5% of China's total capacity in 2011, showing obvious scale advantages.

While chemical fiber companies provided with dissolving pulp capacity merely consist of Jilin Chemical Fiber Group and Yibin Grace Group, of which, Jilin Chemical Fiber Group shows outstanding technical superiority relying on its sophisticated bamboo pulp-bamboo fiber industry chain, and the 95,000 t/a bamboo pulp project to be put into operation at the end of 2012 will further consolidate the company's dominant position in the bamboo pulp market.

Chinese Dissolving Pulp Manufacturers and Capacity Proportion, 2011



Source: ResearchInChina' Global and China Dissolving Pulp Industry Report, 2011-2012'

Global and China Dissolving Pulp Industry Report, 2011-2012 by ResearchInChina mainly covers the followings:

Supply & demand, regional distribution, competitive landscape of global dissolving pulp industry;

International dissolving pulp price trend, projects planned or under construction of worldwide leading manufacturers;

Supply & demand, competitive landscape, import & export of China's dissolving pulp industry;

Cost analysis, projects planned or under construction of dissolving pulp in China;

Operation, production & marketing, supplier & client, capacity dynamics of 14 dissolving pulp producers at home and abroad.

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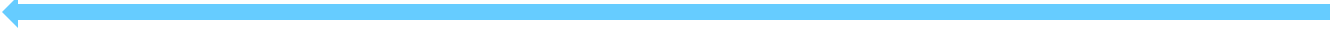
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