Global and China Viscose Fiber Industry Report, 2012-2015

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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 Company Reports, and National Bureau of Statistics of China etc.

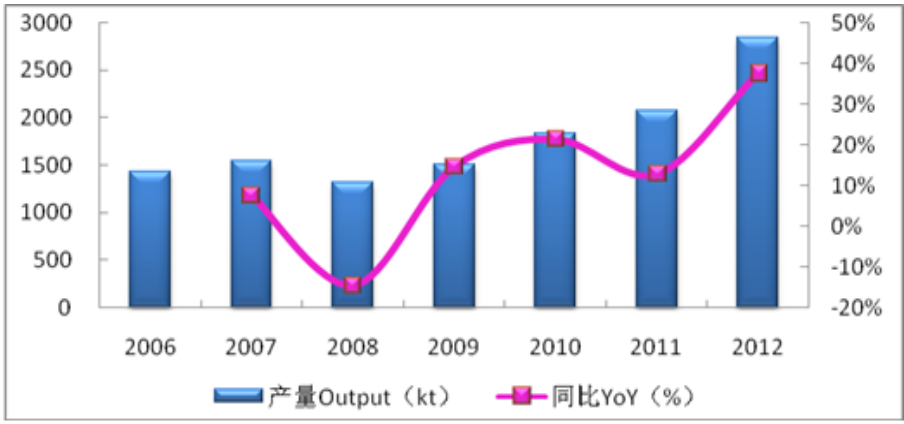
Abstract

Viscose fiber is a type of artificial cellulose fiber made of such raw materials as wood, bamboo and cotton linters, mainly used in the textile industry. Viscose fiber includes viscose filament yarn and viscose staple fiber, especially the viscose staple fiber output accounts for about 90% of the total viscose fiber output.

Since the 21st century, due to high labor costs and strict environmental requirements, Europe, the United States and other developed countries have transferred their viscose fiber production to Asia-Pacific region. Currently about 80% of the global viscose fiber output comes from the developing countries in Asia-Pacific. China has become the world's largest viscose fiber producer, and its output accounted for roughly 62% of global total in 2012.

In 2006-2012, China's viscose fiber output grew quickly at the average compound annual growth rate of 12.1%. In 2012, the output rose to 2,588 kt, which was mainly distributed in East China, North China and Northwest China. China mainly produces general viscose fiber, while it needs to import high-end viscose fiber such as lyocell fiber and modal fiber.

Viscose Fiber Output and YoY Growth Rate in China, 2006-2012



Source: National Bureau of Statistics of China;
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In 2012, Aditya Birla Group was the world's largest manufacturer of viscose fiber with the capacity of 800,000 tons or so and production bases in countries like India, Thailand, Indonesia and China. Austrian Lenzing ranked the second with the viscose fiber capacity of 770 kt(2011) and plants in Austria, Indonesia, China, the United Kingdom and the United States; besides, it occupies a monopolistic position in lyocell fiber and modal fiber. In addition to the above two companies, large viscose fiber manufacturers are mainly located in China.

Chinese viscose fiber industry features high concentration. In 2012, top 10 viscose fiber producers contributed 77.3% to national total viscose fiber capacity. Fulida Group is the largest viscose staple fiber manufacturer in China, Xinxiang Chemical Fiber and Grace Group act as the biggest Chinese producers of viscose filament yarn.

Jilin Chemical Fiber is the largest bamboo fiber production enterprise in China, with its capacity of bamboo staple fiber and bamboo filament yarn reaching48 kt/a and 7 kt/a respectively in 2012. The company is currently expanding the bamboo pulp and bamboo staple fiber capacity, in order to maintain the dominating position in the bamboo fiber market.

The report highlights the followings:

Supply & demand, competition pattern and development trends of the global viscose fiber industry;
Development course, operation and policies of China viscose fiber industry;
Supply & demand, import & export and price trend of China viscose fiber industry;
Status quo and competition patterns of Chinese bamboo fiber market segments;
Operation, viscose fiber business and development forecast of 13 global and Chinese viscose fiber producers.

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