Global and China Dissolving Pulp 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

Dissolving pulp refers to the pulp with the cellulose content above 90%, including wood pulp, bamboo pulp and cotton pulp. The report touches on the first two categories.

In the world, the dissolving pulp capacity concentrates in regions with abundant forest resources such as North America, South Africa and Brazil. Between 2011 and 2012, China's intensive release of dissolving pulp capacity made it possible to become one of the major producing regions of dissolving pulp all across the globe. Major dissolving pulp producers worldwide include Aditya Birla, Sappi, Sateri, Rayonier, Buckeye, and Lenzing, the combined capacity of which in 2012 accounted for 61.4% of the world's total.

In 2010, the dissolving pulp capacity of China was no more than 240,000 tons, with the import dependence rate surpassing 80%. The considerable demand for dissolving pulp encouraged many companies to build new dissolving pulp projects, leading to the substantial rise in capacity to 937,500 tons by 2012.

However, due to the bleak demand in global textile market as well as the international low-priced dissolving pulp, China-made dissolving pulp products took a nosedive in price, forcing most industrial players to slash their output and even suspend their production in order to reduce losses. In 2012, China's dissolving pulp output was just about 335,000 tons, with the operating rate down to 35.7%.

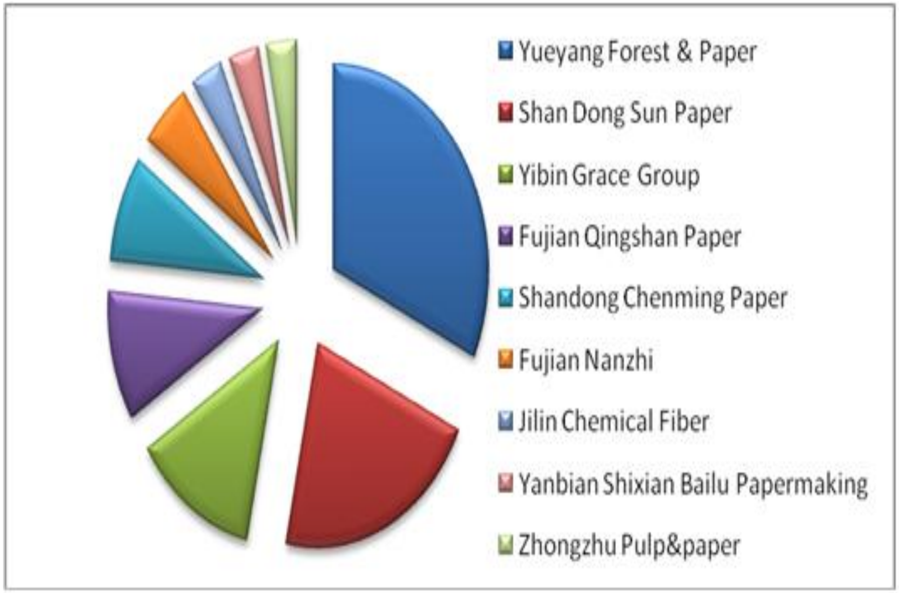
The downstream application of dissolving pulp, with the raw materials of wood and bamboo, concentrates in viscose industry. China boasts the world's largest viscose producing region, with 2012 output making up 62% of the global total. And the China's viscose output is predicted to keep a growth rate of 10% in upcoming years, further boosting the demand for dissolving pulp. At the same time, the Ministry of Commerce of China is set to launch anti-dumping champion on dissolving pulp projects in Feb.2013. If approved, China-made dissolving pulp is expected to give full play to the advantages as substitutes of its imported equivalents, witnessing double rise in both output and price.

There were only 9 companies in China in the production of dissolving pulp in 2012. Most of them are medium- and large-sized papermaking and chemical fiber enterprises. Among the papermaking companies, they were Yueyang Forest & Paper, Sun Paper and Fujian Qingshan Paper Industry which were specialized in the production of wood dissolving pulp with the respective capacity of 300,000 tons/a, 200,000 tons/a and 96,000 tons/a; among the chemical fiber players, they were Jilin Chemical Fiber Group and Yibin Grace Group Company which were primarily focused on the production of bamboo dissolving pulp. In particular, Jilin Chemical Fiber Group's 95,000 tons/a bamboo pulp project is under construction and, is expected to be put into production by the end of 2013.

The report deals with the followings:

Supply & Demand, Competition Pattern, and Price Analysis of Global Dissolving Pulp Industry;
Supply & Demand, Competition Pattern, Import & Export, Price Analysis, Development and Outlook of China Dissolving Pulp Industry;
Supply & Demand, Competition Pattern, Import & Export, Price Analysis, Development and Outlook of Downstream Viscose Industry;
Operation, Dissolving Pulp Business, Prediction and Prospects of 13 Dissolving Pulp Manufacturers Worldwide;

Dissolving Pulp Companies in China and Their Capacities (%), 2012



Source: ResearchInChina *Global and China Dissolving Pulp Industry Report, 2012-2015*

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