

**Global and China Dissolving Pulp Industry  
Report, 2014-2017**

**Apr. 2015**

## 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 cellulose content above 90%, mainly including wood pulp, bamboo pulp and cotton pulp (dissolving pulp in this report just involves wood and bamboo pulps), and finding application mainly in viscose fiber downstream.

In 2014, there were a great number of newly-added capacities for dissolving pulp, such as Sappi's 330 t/a capacity in North America, Double A (Thailand)'s 175 kt/a capacity, and 110 kt/a capacity of OJI (Japan). However, due to constantly-depressed downstream viscose fiber market, price of dissolving pulp continued to drop, being USD800/ton around at the end of 2014.

In 2015, there are still several dissolving pulp projects under construction, for instance, Lenzing is expanding its dissolving pulp capacity, Aditya Birla builds a 200 kt/a capacity in Laos.

The world's dissolving pulp industry features quite high concentration and key industrial players consist of Sappi, Aditya Birla, Lenzing, Bracell, Rayonier, etc. In 2014, the total dissolving pulp capacity of the aforesaid five producers accounted for roughly 53.3% of global total, in particular, Sappi owned 1.34 million t/a capacity, holding 18.9% in global total, and set up production bases in South Africa and North America.

China's dissolving pulp capacity soared from 2011, and had climbed to 1.2 million tons around at the end of 2014, making up 17% of the global total, but due to lack of forest resources, Chinese dissolving pulp requires high production costs and thus shows weak competitiveness.

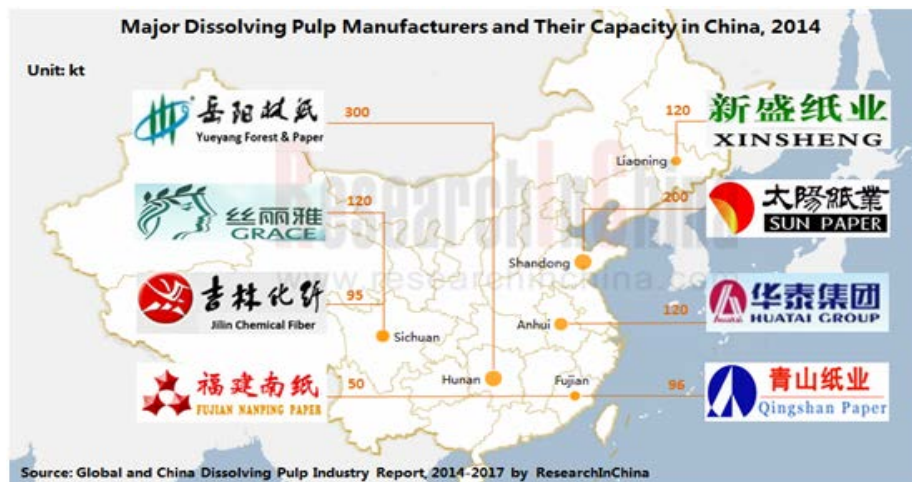
In 2014, influenced by sluggish downstream viscose fiber industry in China and cheap dissolving pulp in international market, China dissolving pulp industry suffered a huge loss, so some dissolving pulp devices were switched to other products or even halted production, for example, Sun Paper's dissolving pulp devices were switched to production of paper pulp in April, equipment of Yueyang Forest & Paper began to produce bleached softwood pulp in July, and Fujian Nanping Paper's devices stopped production.

In April, 2014, Ministry of Commerce of PRC publicized final judge on anti-dumping investigation, which indicated that China would impose anti-dumping rate of 17%, 13% and 6.8% on dissolving pulp imported from United States, Canada and Brazil in the next five years. In addition, newly-added dissolving pulp capacity in China will be relatively few in the future, at that time, excessive supply is predicted to be eased and China dissolving pulp industry will gradually bottom out.

In China, companies owning dissolving pulp production devices are mainly medium and large paper-making enterprises and chemical fiber manufacturers; wherein, the paper-making enterprises is chiefly composed of Yueyang Forest & Paper, Sun Paper and Huatai Paper which mainly provide wood dissolving pulp, and possess 300 kt/a capacity, 200 kt/a capacity and 120 kt/a capacity respectively; and chemical fiber enterprises include Yibin Grace Group and Jilin Chemical Fiber Group whose major product is bamboo dissolving pulp, among which the 95 kt/a bamboo dissolving pulp project of Jilin Chemical Fiber had started trial operation in September, 2014.

Global and China Dissolving Pulp Industry Report, 2014-2017 released by ResearchInChina highlights the followings:

- Market size, competitive landscape, price analysis, etc. of global dissolving pulp industry;
- Market size, competition pattern, import & export, price analysis, development forecast, etc. of China dissolving pulp industry;
- Market size, competition pattern, import & export, price analysis, development forecast, etc. of China viscose fiber industry;
- Operation, dissolving pulp business analysis, prediction & prospects, etc. of 13 global and Chinese dissolving pulp manufacturers.



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