# Global and China Dissolving Pulp Industry Report, 2016-2020

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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 cellulose content above 90%, including primarily wood pulp, bamboo pulp and cotton pulp (dissolving pulp in this report just involves wood and bamboo pulp). Viscose fibre, the main application field, accounts for 3/4 of total consumption of dissolving pulp.

Global dissolving pulp capacity totaled about 7.5 million tons in 2015, mostly distributed in the regions/countries with rich forest resources including North America, South Africa, and Brazil. The world's major dissolving pulp producers are Sappi, Aditya Birla, Lenzing, Sun Paper, Bracell, Rayonier, etc. which produce mainly dissolving wood pulp and hold a combined 57% share of the global total capacity. The dissolving pulp produced by Lenzing is completely used for in-house production of viscose fiber.

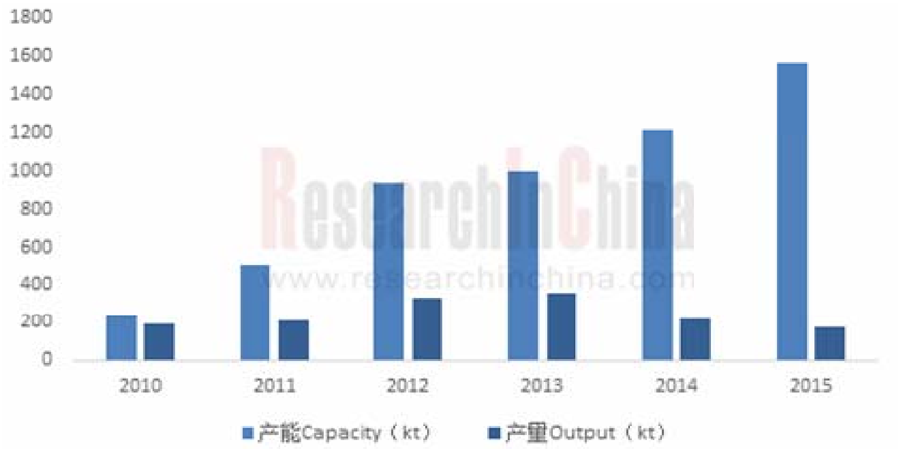
Globally, there are still a number of dissolving pulp projects under construction in 2016, such as Lenzing's ongoing dissolving capacity expansion, Aditya Birla's new 200kt dissolving pulp project in Laos, and Domtar's 516kt dissolving pulp renovation project launched in early 2015. With ever-growing dissolving pulp capacity, global dissolving pulp prices will remain low on the whole over the next couple of years.

Exploding in 2011, China's dissolving pulp capacity reached around 1.56 million tons at the end of 2015, making up 20.8% of the global total. Despite large dissolving pulp capacity in China, most of facilities have stopped production or shifted to paper pulp due to continued losses of dissolving pulp producers in recent years. Actual output of dissolving pulp was less than 200kt in 2015.

Because of a shortage of forest resources, the Chinese dissolving pulp companies have been plagued with higher production costs and weaker competitiveness. During 2012-2015, due to sluggish demand for viscose staple fiber, dissolving pulp overcapacity, and impact of international low-cost dissolving pulp on domestic market, the dissolving pulp sector in China almost suffered losses across the industry. With the implementation of the Chinese government's anti-dumping rulings and gradual recovery of downstream viscose staple fiber industry, it is expected the country's dissolving pulp sector will bottom out during 2016-2020 with output and apparent consumption of dissolving pulp amounting to 320 kt and 3,184 kt respectively in 2020.

The Chinese dissolving pulp market underwent great changes in competitive landscape in 2015, as the leading Sun Paper continued to significantly expand its dissolving pulp capacity with 350kt dissolving pulp capacity put into production in November which brought total capacity up to 500kt/a, Yueyang Forest & Paper and Jilin Chemical Fiber swapped their dissolving pulp assets with big shareholders for other items and held no such assets, and Fujian Nanping Paper and YanbianShixian Double-deer Industrial restructured their businesses and spun off paper products and dissolving pulp businesses due to years of losses.

**Dissolving Pulp Capacity and Output in China, 2010-2015**




Source: ResearchInChina

Global and China Dissolving Pulp Industry Report, 2016-2020 by ResearchInChina focuses on the followings:

- Global dissolving pulp industry (market size, competitive landscape, prices, etc.);
- China's dissolving pulp industry (market size, competitive landscape, imports/exports, prices, development forecast, etc.);
- Chinese viscose fiber industry (market size, competitive landscape, imports/exports, prices, development forecast, etc.);
- 12 global and Chinese dissolving pulp producers (operation, dissolving pulp business, forecast and prospects, etc.)

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