

Global and China Viscose Fiber Industry Report, 2019-2025

May 2019

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

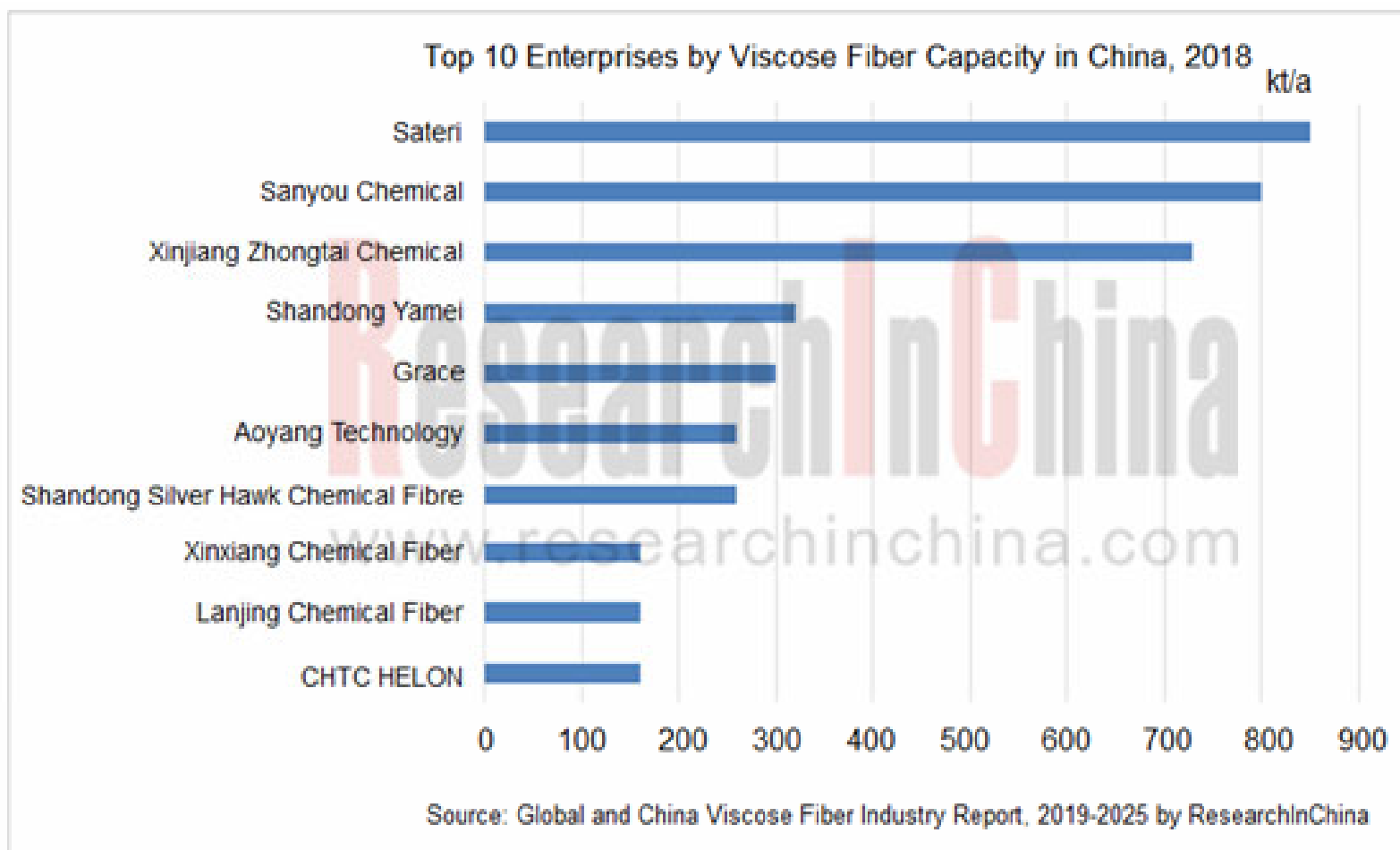
Over the recent years, the developed countries like the United States, Japan and EU members have withdrawn from the viscose fiber industry due to environmental factor and so forth, while the viscose fiber is in full swing in Asian regions, particularly in China, with a significant rise in both capacity and output. In 2018, the global output of viscose fiber reached approximately 5.8 million tons to which China contributed 65% or so.

As the world leaders in viscose fiber, the Austria-based Lenzing and the India-based Aditya Birla Group (with its viscose business undertaken by Grasim) boasted production capacity of more than 800 kt/a apiece in 2018. Besides, the players in possession of large capacity come mainly from China.

Of viscose fiber products, viscose staple fiber is produced largely in China and its capacity/output takes a lion's share of as high as 90% or so. As of the end of 2018, China's capacity of viscose staple fiber grew at an ever faster rate and posted 4.75 million tons, an addition of 700 kt from 2017.

In the Chinese viscose staple fiber market featuring a fairly high concentration ratio, the six leading manufacturers (including Sateri (China), Sanyou Chemical, Xinjiang Zhongtai Chemical, Grace, Shandong Silver Hawk Chemical Fibre, Aoyang Technology) hold a combined share of 74.1% in such market segment. Of them, Sateri boasted the biggest capacity of viscose staple fiber in China, with its three factories at the end of 2018 capable of producing a total of 850 kt/a, a figure then lifted to 1,100 kt/a in April 2019 when Sateri acquired the heavily indebted Jiangsu Xiangsheng Viscose Fiber Co., Ltd.

With other enterprises' production expansion projects and the ones under construction included, in China, there will be an additional capacity of roughly 350 kilotons in 2019 when the total capacity of viscose fiber will foot up to 5,100 kilotons. With technical advances, the effective production capacity of viscose fiber will continue to grow domestically and the products get increasingly differentiated for a high-end trend.



As a result of the great impact of capacity increment on the market, the growing stringent environmental campaign across the country as well as the depressed market demand for rayon yarn, the market price of viscose staple fiber showed a downward mobility and touched the bottom in December 2018, causing the loss-making of the vast majority of viscose firms. It is expected that the market price of viscose staple fiber will rise to a limited extent in 2019.

As for imports and exports, the China-US trade war in 2018 inflicted the Chinese viscose fiber market a bit. From 2011 to 2018, China's viscose fiber exports maintained steady growth, of which the exports of viscose staple fiber stood at 370 kilotons and presented a CAGR of 12.5% in 2018. China's export of viscose fiber is anticipated to remain sound with stronger competitiveness as the production capacity gets beefed up and the rate of fiber differentiation climbs.

The report mainly includes the following aspects:

- Supply, regional structure, competition pattern and trends of global viscose fiber market;
- Supply, capacity, competition pattern, policies, import, export and prices of Chinese viscose fiber market;
- Market development and tendencies of upstream dissolving pulp and downstream rayon yarn;
- Operation, viscose fiber business and development of 17 Chinese and foreign viscose fiber manufacturers.

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