

**Global and China Dissolving Pulp Industry
Report, 2019-2025**

Sep. 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

In 2018, global dissolving pulp capacity outstripped 10 million tons and its output surged by 14.0% from a year ago to 7.07 million tons, roughly 70% of the capacity. China, as a key supplier of dissolving pulp, produced 1.56 million tons (a 22.1% share of global total) in 2018, 2.5% less than in the previous year, with output showing a CAGR of 4.8% from 2012 to 2018.

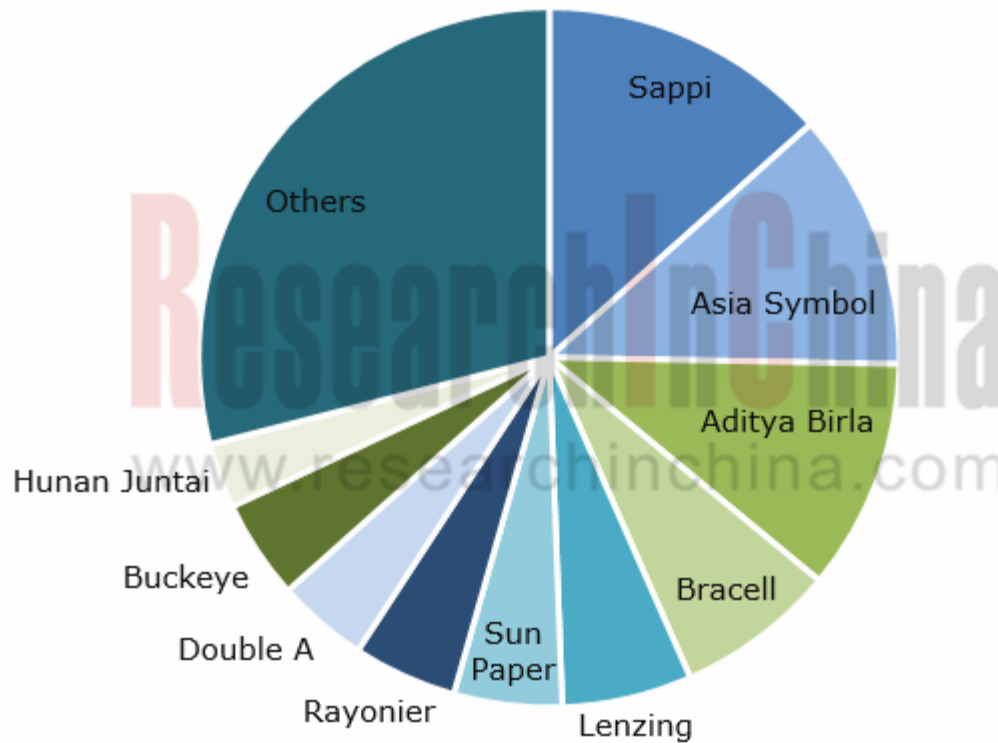
China's dissolving pulp market in 2018/2019 is featured as follows:

By product segment: wood pulp output sustained growth, while cotton and bamboo pulp and modified pulp kept falling in output. In 2018, 1.07 million tons of wood pulp, or 68.6% of China's total dissolving pulp output, was produced, up by 1.9% on an annualized basis; output of cotton & bamboo pulp and modified pulp reduced by 8.6% and 15.0%, respectively.

By price: due to China-US trade tensions (China imposed additional tariffs of 5% on dissolving pulp originating from the United States; China and the United States placed additional 25% tariffs on viscose staple fiber originating from each other), Chinese dissolving pulp (wood pulp) price has presented a choppy downtrend since the second half of 2018, nose-diving to around RMB6,500/ton in the first half of 2019, compared with over RMB7,500/ton in 2018.

By application: viscose staple fiber uses the most dissolving pulp. China's output of viscose staple fiber jumped by 7.6% over the previous year to virtually 3.95 million tons in 2018, showing a CAGR of 11.6% between 2008 and 2018. The continued expansion of viscose staple fiber capacity and the release of downstream cellulose fiber capacity in the forthcoming years, will favor solid growth in viscose staple fiber output of the country.

Competitive Pattern of Global Dissolving Pulp Market, 2018



Source: ResearchInChina

By competitive pattern: globally, key dissolving pulp producers are Sappi (South Africa), Bracell (Brazil), Lenzing (Australia), and some Chinese companies like Shandong Sun Paper Industry Joint Stock Co., Ltd., Asia Symbol (Shandong) Pulp & Paper Co., Ltd., Hunan Juntai New Material Technology Co., Ltd. and Fujian Qingshan Paper Industry Co., Ltd.. In 2018, global CR10 exceeded 70%, among which Sappi came to the top spot with a 13.4% share in the global market. As the biggest Chinese producer of dissolving pulp, Shandong Sun Paper Industry Joint Stock Co., Ltd. which swept 19.2% shares in the Chinese market in 2018, occupies 5.0% of the global market.

Global and China Dissolving Pulp Industry Report, 2019-2025 highlights the following:

- Dissolving pulp (definition, classification, industry chain, etc.);
- Global dissolving pulp market (status quo, competitive pattern, and price);
- China dissolving pulp market (status quo, supply, demand, price, import, competitive pattern, etc.);
- Downstream viscose staple fiber market (status quo, capacity, output, import and export, price, etc.);
- 5 global and 9 Chinese dissolving pulp producers (operation, revenue structure, dissolving pulp business, etc.).

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- 1.2 Industrial Chain

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- 2.1 Status Quo
- 2.2 Competitive Landscape
- 2.3 Price Analysis

3. China Dissolving Pulp Industry

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7.1 Conclusion

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