

Global Pulp Market: Analysis By Demand, By Production, By Type (Bleached Hardwood Kraft, Bleached Softwood Kraft, Mechanical, and UKP), By End Market (Tissue, Packaging, Printing & Writing, Specialty and Fluff), By Region, Size and Trends with Impact of COVID-19 and Forecast up to 2028

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Abstracts

Global pulp market demand stood at 66.02 million tons in 2022, and is expected to reach 73.84 million tons by 2028. Pulp, a naturally derived wood-based material, possesses purity, organic composition, and biodegradability. Its versatile applications include the production of paper, tissue, sheets, and advanced paper, all ensuring the creation of 100% organic bioproducts. Paper pulp, the fundamental ingredient for paper production, forms the basis for the entire paper-making process. With a longstanding presence as a crucial element in daily life, paper, driven by heightened demand from printing and writing sectors, is poised for market expansion, projecting growth in the pulp industry. The pulp market production is probable to reach 75.04 million tons by 2028.

The pulp industry is a global market, and heavily reliant on international trade and economic activity. The rise of bioeconomy initiatives is expected to drive the pulp demand in coming years. Pulp, as a renewable resource, aligns with the goals of bioeconomy, emphasizing the sustainable use of biological resources for various applications. Innovations in biorefinery concepts are expanding the utility of pulp by extracting additional value from by-products, such as lignin and hemicellulose, for bio-based chemicals and materials. Moreover, in response to the digital age, there's a notable surge in paper and pulp applications beyond traditional uses. Specialty papers, 3D printing materials, and other high-value products are emerging as novel avenues for

pulp utilization. During the forecasted years, demand would show significant growth with China being the most significant growth driver. The pulp market demand is expected to grow at a CAGR of 2.06% over the years 2023-2028.

Market Segmentation Analysis:

By Type: The global pulp market demand can be divided into four segments based on the type: Bleached Hardwood Kraft, Bleached Softwood Kraft, Mechanical and UKP (Unbleached Kraft Pulp). Bleached Hardwood Kraft segment generated the highest revenue in 2022. Derived from hardwood trees like eucalyptus and birch, this pulp type is favored for its versatility and strength. The demand for Bleached Hardwood Pulp is on the rise due to its widespread applications, especially in the production of printing and writing papers. The growth in the packaging industry, particularly for consumer goods, further propels the demand for this pulp type. Additionally, the pulp's suitability for various specialty papers and tissue products contributes to its expanding market share.

By End Market: The report provides the bifurcation of pulp market into five segments on the basis of end market: Tissue, Packaging, Printing & Writing, Specialty and Fluff. The tissue segment in the global pulp market is witnessing robust growth, driven by factors such as increasing hygiene awareness, population growth, and evolving consumer preferences. The demand for tissue products, including facial tissues, paper towels, and bathroom tissues, continues to rise globally. Growing middle-class populations in emerging economies contribute significantly to this demand, as does the trend towards premium and sustainable tissue products.

By Region: In the report, the global pulp market demand is divided into four regions: Asia Pacific, Europe, North America, and ROW. The Asia Pacific region has solidified its position as a formidable force in the global pulp market demand, propelled by a confluence of factors such as rapid industrialization, robust economic growth, and the burgeoning population that characterizes the region. The dynamic and diverse economies within the Asia Pacific have contributed significantly to the escalating demand for pulp and its derivatives. Rapid industrialization across several countries in the region has fueled an increased need for various paper and packaging materials, thereby driving the demand for pulp. This industrial surge is driven by factors such as technological advancements, infrastructure development, and the establishment of manufacturing hubs, making the Asia Pacific region a key player in the global pulp industry. Over time, China has become an increasingly important importer of pulp. However, since much of this is used in the production of packaging for goods destined for re-export, the driving factor behind the surge in pulp demand in China is the growing

reliance on paper-based materials as an environmentally sustainable alternative to plastic packaging.

The European market stands out for its robust paper and packaging industries, serving as key consumers of pulp. Ongoing innovations in pulp-based products, spanning from cutting-edge packaging materials to specialized papers, contribute to the sustained demand in the region. The circular economy approach, which places a strong emphasis on recycling and waste reduction, aligns seamlessly with Europe's commitment to environmental stewardship. This holistic approach not only drives the demand for sustainable pulp but also fosters a culture of responsible consumption and production practices in the European pulp and paper sector.

The global pulp market production is divided into eight regions on the basis of geographical operation, namely The US, Brazil, China, Canada, Sweden, Finland, Japan and Rest of the World (ROW). The US stands out in the global pulp market due to its advanced pulp and paper industry. With a focus on sustainability, the US emphasizes responsible forestry practices and investments in cutting-edge technologies for pulp processing. The country's diverse geographical regions contribute to a varied supply of wood species, influencing the quality and characteristics of the produced pulp. The US also plays a crucial role in research and development, driving innovations in pulp production processes.

China is expected to grow significantly during the forecasted period. As a global manufacturing hub and the world's largest consumer of paper products, China's influence on pulp production is substantial. The country's commitment to environmental sustainability has led to advancements in cleaner pulping technologies and increased use of recycled fibers. China's dynamic market demands, driven by a growing middle class, stimulate continuous innovation in pulp-based products, making it a key player in shaping the future of the global pulp industry.

Market Dynamics:

Growth Drivers: The market has been growing over the past few years, due to factors such as increasing demand for packaging materials, rising demand for hardwood pulp, shift towards eco friendly practices, growing demand for tissue and hygiene products, and stringent government regulations rising demand for specialty cellulose. The global pulp market is experiencing robust growth driven by the increasing demand for packaging materials. As consumer preferences evolve, there is a rising emphasis on sustainable and eco-friendly packaging solutions, propelling the demand for pulp-based

materials. Pulp, derived from wood fibers, serves as a fundamental component in the production of paper and packaging products. The surge in e-commerce activities, coupled with a growing awareness of environmental concerns, has fueled the need for efficient and recyclable packaging materials. Additionally, stringent regulations promoting the use of sustainable packaging further stimulate the market. Manufacturers are increasingly adopting pulp-based solutions to meet these criteria, thereby contributing to the expansion of the global pulp market.

Challenges: However, some challenges are also impeding the growth of the market such as availability of substitutes and changing consumer preferences. The emergence and adoption of substitute materials pose a significant challenge to the pulp market. With increasing emphasis on sustainable practices and a growing awareness of environmental concerns, industries are exploring alternatives to traditional pulp-based products. Synthetic fibers, bio-based polymers, and other innovative materials offer viable substitutes for paper and packaging applications. These substitutes often boast characteristics such as lightweight, durability, and recyclability, challenging the dominance of conventional pulp products.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as rising demand for specialty cellulose, recycled pulp and waste reduction and growing applications of nanocellulose. The pulp market is experiencing a significant trend with the growing demand for specialty cellulose, driven by diverse industrial applications and heightened environmental awareness. Specialty cellulose, derived from refined wood pulp, is witnessing increased demand due to its versatility and unique properties. Its application spans a wide range of industries, including textiles, pharmaceuticals, food products, and specialty papers. In the textile industry, specialty cellulose is used to produce fibers with enhanced strength and absorbency. In pharmaceuticals, it serves as a crucial ingredient in drug formulations. Moreover, the pulp market benefits from the rising preference for sustainable and eco-friendly materials, as specialty cellulose often originates from responsibly managed forests and offers a more environmentally friendly alternative to conventional cellulose sources.

Impact Analysis of COVID-19 and Way Forward:

In 2020, the COVID-19 pandemic had a varied impact on the pulp market. Initially, global lockdowns and supply chain disruptions led to decreased demand for pulp and paper products due to operational challenges faced by businesses. Temporary closures of offices, schools, and businesses resulted in reduced consumption of printed

materials, affecting demand for pulp-based paper. Despite these challenges, the pandemic showcased the pulp industry's resilience. The shift to remote work and online education increased demand for packaging materials, particularly in e-commerce, while heightened hygiene awareness influenced demand for certain pulp-based items. Despite disruptions, the pulp sector experienced a positive impact on both demand and production in the latter half of 2020.

In the post-COVID-19 scenario, the global pulp market is expected to witness a robust resurgence and sustained growth. The surge in e-commerce during the pandemic may continue, driving sustained demand for packaging materials. Pulp-based packaging, especially those with eco-friendly attributes, might be in higher demand as environmental concerns remain a key focus.

Competitive Landscape:

The global pulp market is consolidated. The companies are focusing on inorganic growth strategies such as mergers and acquisitions to increase their business reach. The majority of global hardwood kraft pulp production is highly centralized, with the top five global producers jointly accounting for around 60% of the total hardwood market pulp output worldwide. This concentration emphasizes the considerable impact wielded by a limited number of major players in influencing the dynamics of the global hardwood pulp market. The merger between Suzano Pulp & Paper and Fibria, completed in 2019, played a crucial role in significantly strengthening the overall hardwood pulp capacity on a global scale. This consolidation resulted in a substantial improvement in the combined entity's capabilities and market position within the global pulp market.

Key players of global pulp market are:

Canfor Corporation (Canfor Pulp Products)

Suzano S.A.

Arauco and Constitution Pulp Inc.

Mercer International Inc.

WestRock Company

International Paper Company

Stora Enso Oyj

UPM-Kymmene Oyj

Oji Holdings Corporation

Billerud AB

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