

Viscose Fiber Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

<https://marketpublishers.com/r/VDF33F4848D2EN.html>

Date: July 2025

Pages: 111

Price: US\$ 3,200.00 (Single User License)

ID: VDF33F4848D2EN

Abstracts

Viscose Fiber Market Summary

Introduction

The viscose fiber market encompasses the production and application of regenerated cellulose fibers derived from wood pulp and other natural sources, widely used in textiles and industrial products. Viscose fibers, categorized into viscose staple fiber (VSF) and viscose filament yarn (VFY), are valued for their softness, breathability, and cost-effectiveness, making them a sustainable alternative to cotton and synthetic fibers. VSF dominates the market, accounting for approximately 90% of global production, primarily used in clothing and home textiles, while VFY is a key material in high-end apparel, including traditional garments like Chinese hanfu and horse-face skirts, driven by the resurgence of cultural fashion trends. The market is propelled by rising demand for eco-friendly textiles, growing consumer preference for sustainable and biodegradable materials, and expanding applications in medical and industrial sectors. In China, the largest global producer and consumer of viscose fiber, the industry faces regulatory shifts, such as the National Development and Reform Commission's 2019 directive classifying VSF production lines with capacities of 40,000 tons/year or less as obsolete, pushing manufacturers toward modernization and sustainability. Key applications include clothing, home textiles, industrial uses, and other niche sectors, with VSF leading in volume and VFY gaining traction in premium apparel. Asia Pacific, particularly China, dominates production and consumption, while Europe and India focus on sustainable innovations. Emerging trends include closed-loop production, dope-dyed fibers, and partnerships for textile recycling, though challenges like environmental concerns, raw material price volatility, and regulatory compliance persist.

Market Size and Growth Forecast

The global viscose fiber market is projected to reach USD 27–30 billion by 2025, with an estimated compound annual growth rate (CAGR) of 5%–7% through 2030. This growth is driven by increasing demand for sustainable textiles, the rise of cultural fashion trends, and expanding industrial applications, supported by technological advancements in eco-friendly production processes.

Regional Analysis

Asia Pacific is expected to lead the viscose fiber market with a growth rate of 6%–8%, driven by China, India, and Indonesia. China dominates as the largest producer and consumer, with a robust textile industry and companies like Sateri and Tangshan Sanyou Group leading production. The resurgence of cultural garments like hanfu, with hanfu orders surging 336% and horse-face skirts 841% year-over-year in 2023, fuels VFY demand. India's textile sector, supported by government initiatives like the Amended Technological Upgradation Fund Scheme, drives VSF growth, while Indonesia focuses on export-oriented production.

Europe follows with a growth rate of 5%–7%, led by Austria, Germany, and the UK. Austria's Lenzing pioneers sustainable fibers like TENCEL™, emphasizing closed-loop processes. Germany's industrial applications and the UK's focus on eco-conscious fashion drive demand, with trends centering on regulatory compliance and circularity.

North America, with a growth rate of 4.5%–6.5%, is driven by the United States and Canada. The U.S. market focuses on medical textiles and sustainable apparel, while Canada's niche applications in home textiles grow steadily. Trends emphasize biodegradable fibers and compliance with EPA regulations.

South America, with a growth rate of 4%–6%, sees demand in Brazil and Argentina, driven by apparel and home textile markets. Brazil's growing e-commerce sector supports adoption, though limited production capacity constrains growth.

The Middle East and Africa, with a growth rate of 3.5%–5.5%, are led by the UAE and South Africa. The UAE's luxury fashion market drives VFY demand, while South Africa's textile sector supports modest VSF growth. Infrastructure limitations pose challenges.

Application Analysis

Clothing: Expected to grow at 5.5%–7.5%, this segment dominates due to VSF's use in everyday apparel and VFY's role in premium garments like hanfu and horse-face skirts. Trends include dope-dyed fibers for vibrant colors and partnerships with fashion brands for sustainable collections.

Home Textile: With a growth rate of 5%–7%, this segment includes bedding, curtains, and upholstery, leveraging VSF's softness and absorbency. Trends focus on eco-friendly fibers and circular production models.

Industrial: Projected to grow at 4.5%–6.5%, this segment covers nonwovens, filters, and composites for automotive and construction. Trends emphasize durable, high-strength fibers and biodegradable industrial materials.

Others: Expected to grow at 4%–6%, this segment includes medical textiles like surgical gowns and niche applications. Trends focus on biocompatibility and sustainability, driven by healthcare demand.

Type Analysis

Viscose Staple Fiber (VSF): Projected to grow at 5%–7%, VSF dominates due to its versatility in clothing and home textiles. Trends include closed-loop production and innovations like high wet modulus fibers for enhanced durability.

Viscose Filament Yarn (VFY): Expected to grow at 6%–8%, VFY is gaining traction in high-end apparel, particularly cultural garments. Trends focus on premium, sustainable filaments and partnerships for recycled fibers.

Key Market Players

Sateri: A China-based leader, Sateri produces VSF and VFY for apparel and home textiles, emphasizing sustainable production and circularity through partnerships like Infinited Fiber Company.

Fulida: A Chinese firm, Fulida specializes in VSF for clothing and industrial applications, focusing on high-volume production and eco-friendly processes.

Lenzing: An Austrian company, Lenzing offers sustainable VSF and VFY under brands

like TENCEL™, known for closed-loop production and biodegradable fibers.

Aditya Birla (Grasim & Birla): An Indian conglomerate, Aditya Birla produces VSF and VFY through Birla Cellulose, focusing on sustainable apparel and textile recycling.

Shandong Yamei: A Chinese manufacturer, Shandong Yamei produces VSF for clothing and home textiles, with a capacity of 320,000 tons/year, emphasizing cost-effective solutions.

Shandong Chenming: A Chinese firm, Shandong Chenming focuses on VSF for industrial and textile applications, leveraging large-scale production capabilities.

Shandong Silver Hawk Chemical Fiber: A Chinese company, Shandong Silver Hawk produces VSF for apparel and nonwovens, known for high-quality, sustainable fibers.

Tangshan Sanyou Group: A Chinese leader, Tangshan Sanyou produces 800,000 tons of VSF annually, targeting clothing and industrial markets with eco-conscious processes.

Jiangsu Aoyang: A Chinese manufacturer, Jiangsu Aoyang produces VSF for textiles and medical applications, focusing on modernized production facilities.

CHTC Helon: A Chinese firm, CHTC Helon specializes in VSF for apparel and home textiles, emphasizing efficiency and market expansion.

Xinxiang Bailu: A Chinese company, Xinxiang Bailu produces 100,000 tons of VFY annually, focusing on premium apparel like hanfu and export markets.

Nanjing Chemical Fiber: A Chinese manufacturer, Nanjing Chemical Fiber produces 80,000 tons of VSF yearly, targeting clothing and industrial applications.

Jilin Chemical Fiber Group: A Chinese firm, Jilin Chemical Fiber produces 90,000 tons of VFY annually, specializing in cultural apparel and sustainable fibers.

Xinjiang Zhongtai Chemical: A Chinese company, Xinjiang Zhongtai produces 880,000 tons of VSF yearly, focusing on high-volume textile and industrial applications.

Yibin Grace Group: A Chinese manufacturer, Yibin Grace produces 45,000 tons of VFY and 220,000 tons of VSF annually, targeting premium apparel and home textiles.

Porter's Five Forces Analysis

Threat of New Entrants: Moderate. The viscose fiber market has high barriers, including significant capital investment for production facilities and environmental compliance. Established players like Lenzing and Sateri dominate, but new entrants in China offering cost-competitive VSF can emerge, slightly increasing the threat.

Threat of Substitutes: Moderate. Alternatives like cotton, polyester, and lyocell compete with viscose, but its cost-effectiveness and sustainability give it an edge. Lyocell's eco-friendly profile poses a moderate substitution risk in premium markets.

Bargaining Power of Buyers: Moderate to High. Textile manufacturers and fashion brands have negotiating power due to multiple suppliers and standardized VSF products. However, specialized VFY for cultural apparel limits switching options, balancing buyer power.

Bargaining Power of Suppliers: High. Suppliers of dissolving pulp and chemicals (e.g., carbon disulfide, sulfuric acid), concentrated in a few regions, hold significant leverage due to supply chain complexity and environmental regulations.

Competitive Rivalry: High. The market is consolidated, with players like Sateri, Lenzing, and Aditya Birla competing on sustainability, capacity, and innovation. Chinese firms like Tangshan Sanyou intensify rivalry in cost-sensitive markets, driving competition through scale and efficiency.

Market Opportunities and Challenges

Opportunities

Sustainable Textile Demand: Growing consumer preference for eco-friendly fibers, particularly in Europe and North America, drives demand for sustainable VSF and VFY, with companies like Lenzing leading closed-loop innovations.

Cultural Fashion Trends: The resurgence of hanfu and horse-face skirts in

China, with order growth of 336% and 841% respectively in 2023, boosts VFY demand for premium apparel.

Textile Recycling: Partnerships like Aditya Birla's collaboration with Renewcell for recycled fibers create opportunities for circular production models, especially in India and Europe.

Industrial Applications: Expanding use of VSF in nonwovens, filters, and medical textiles offers growth potential, driven by healthcare and automotive sectors in Asia Pacific.

Emerging Market Growth: Rapid textile industry expansion in India and Southeast Asia supports demand for cost-effective VSF, fueled by government incentives and rising consumer spending.

Challenges

Environmental Regulations: Strict regulations, like China's 2019 directive on obsolete VSF lines and the EU's REACH, increase production costs for compliance with chemical and waste management standards.

Raw Material Volatility: Fluctuations in dissolving pulp and chemical prices, particularly in Asia Pacific, challenge cost stability for manufacturers.

Sustainability Pressures: The chemical-intensive nature of viscose production raises environmental concerns, requiring costly investments in greener technologies like closed-loop systems.

Competition from Alternatives: Lyocell and polyester compete in sustainable and cost-sensitive segments, pressuring viscose manufacturers to innovate rapidly.

Supply Chain Constraints: Dependency on concentrated pulp and chemical suppliers exposes the market to shortages and geopolitical risks, particularly in China and Europe.

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