

# THE OUTLOOK FOR FLUFF PULP DEMAND, SUPPLY, AND PRICES

**A multi-client service available in February 2017**

**Prospectus**



# The outlook for fluff pulp demand, supply, and prices

The fluff pulp market has been the subject of much interest lately, attracting significant investment in mill conversions, acquisitions and new capacity. Despite representing only 10% of the global bleached chemical pulp market, the sector has attracted investment because of its remarkably consistent growth rate; global demand has expanded at an average rate of 3.4% pa since 2011, compared to 1.9% pa for paper grade pulp. The growth in fluff pulp demand has been underpinned by improving living standards, demographic trends and low penetration rates in developing countries. However, while the prospects for demand remain stellar, a surge in new supply promises a period of market volatility.

Against this backdrop of growing uncertainty, we have decided to launch a fluff pulp service to provide subscribers with Hawkins Wright's observations on the sector. These observations will be drawn from discussions with industry contacts, coupled with a close examination of historical demand, supply and pricing data. Forecasts for these three variables will also be presented, allowing subscribers to plan effectively and successfully: to identify and seize opportunities and strategize for any threats. The analysis will also include an overview of the dissolving pulp market, which is having an increasingly important influence on capacity developments within the fluff pulp market.

## The service in brief...

Hawkins Wright's unique service delivers:

- One main report published in February, containing detailed supply, demand and price analyses and five-year forecasts. Distributed electronically.
- One interim price forecast update, published in August. Taken together with the main report, this short update report allows the key forecast data and assumptions – in particular the price forecast – to be updated. Distributed electronically.
- Hawkins Wright's response to any questions that the subscriber may have on matters relating to the international fluff pulp market throughout the year. In this way Hawkins Wright can be used as a virtual extension of the subscriber's own marketing or market research department.
- A personal presentation: it will usually be possible for a Hawkins Wright consultant to meet with each client at least once a year to make a presentation on market developments.

**Hawkins Wright** is an independent consultancy providing a range of strategic, forecasting, market intelligence and business information services to the international forest products and bioenergy industries.

Since 1982 Hawkins Wright has provided authoritative and cost-effective services based on in-depth research of the global forest, pulp & paper and bioenergy industries. These services include private consultancy assignments covering a full range of marketing and strategic subjects as well as regular multi-client reports and newsletters.



# The scope of this service

## What you get, in detail...

### Fluff Pulp Outlook service

- **Fluff pulp demand** – 2016 review, historical analysis 2006-2016 by region. Five year demand forecast by region. A review of the end-use markets, and a summary of future trends.
- **Fluff pulp supply** - Capacity by mill, quantifying the theoretical maximum capacity and with estimates for the capacity split at swing mills (paper grade pulp/fluff pulp/dissolving pulp). Capacity forecast summary to 2021, by grade and by mill.
- **Supply/demand balance** – Long term annual projections and a discussion about short term fundamentals. Projections will include 2 scenarios: one looking at the theoretical maximum supply vs. demand. A second scenario will be presented making allowances for fluff pulp supply which may be producing others grades of pulp.
- **Prices** – Macro-economic review. Impact on cost competitiveness of exchange rate fluctuations. Fluff pulp in the context of other global commodities, including paper grade and dissolving pulp. Five year price forecast for fluff pulp Del. North America.

The information will be presented in table and chart form, with accompanying text which will analyse the data.

A PowerPoint presentation containing all of the charts in the report is also made available to subscribers.

We differentiate ourselves from other market intelligence providers by conducting most of our research in the field; desk research is largely used to substantiate our primary research. Our fieldwork has allowed us to build up an unrivalled network of contacts within the industry, ensuring the best quality analysis available.



## Availability and cost...

**An annual subscription to the *Outlook for Fluff Pulp* service costs £1,950.**

**Existing subscribers to Hawkins Wright's services qualify for a discounted price of £1,250/yr.**

The price includes an electronic copy of the main report; an electronic copy of the interim report; Hawkins Wrights responses to any (within reason) questions on fluff pulp markets that may arise during the year; and one or more presentation meetings with one of our consultants. (Such meetings are normally arranged to coincide with major industry events – for example London Pulp Week or MPA – or when a consultant is travelling in the region. However, for specially arranged meetings we reserve the right to charge travel and subsistence costs. Such costs will always be agreed in advance.)

### Contact

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# Order form

A subscription to 'The outlook for fluff pulp demand, supply and prices' costs **£1,950** (or the equivalent in euro or US dollars). Subscribers to Hawkins Wright's Pulpwatch report or to its Market Pulp Outlook multi-client service qualify for a discounted price of £1,250.

I should like to order the multi-client report 'The outlook for fluff pulp demand, supply and prices'. I understand that this report is confidential to subscribers and to their wholly-owned subsidiaries. I agree to take all reasonable steps to safeguard this confidentiality.

Signed:

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Name:

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Fax:

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Email:

*An invoice and payment instructions will be sent when your order is received. Payment may be made by bank transfer, cheque or credit card.*

Our regular and multi-client reports and services include:

- **Pulpwatch** a monthly analysis of developments in the global market pulp industry
- **The Outlook for Market Pulp**, providing forecasts of world market pulp demand, supply, costs and prices
- The Outlook for Dissolving Pulp, providing forecasts of world DWP demand, supply, costs and prices
- **Defining the China Market for Pulp, Paper and Board**, a uniquely detailed analysis of the Chinese pulp and paper industry
- **Forest Energy Monitor**, covering the factors driving the rapidly expanding biomass and wood pellet markets

For more information, please visit: [www.hawkinswright.com](http://www.hawkinswright.com)

