



HAWKINS WRIGHT

A Beginner's Guide to the Pulp Market

January 2021.

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Overview of the Pulp Market



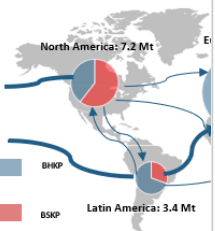
In 2019, global production of wood pulp was approximately 179 million tonnes. North America is the largest producing region of wood pulp, with total output amounting to just under 65Mt in 2019.

Most pulp production is used in the manufacture of paper and paperboard, which totaled 376Mt in 2019. The remainder is used in a wide

variety of other industries to r
other products. On a global ba
remainder is derived from rec
"utilisation rate". The utilisati

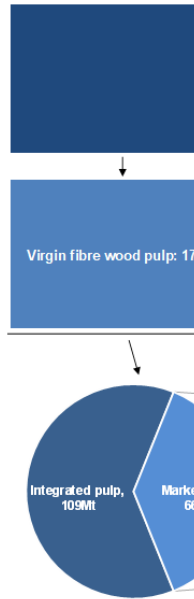
Roughly 64% of wood pulp pro
mill. Integrated pulp is fed dire
dried and shipped in bales, or
70 companies in over 190 mill
55% crosses an ocean.

Main global market pulp trade

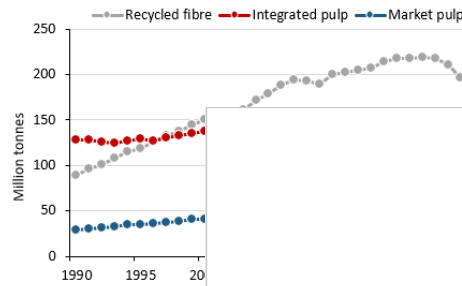


Global Fibre Consumption by Grade

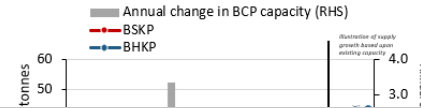
Global fibre consumption by grade, 2019 (millions of tonnes)



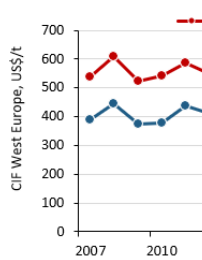
World fibre demand by grade, 1990-2020



Annual change in BCP capacity and growth by grade, 2000-2024



Pulp production cash costs, C



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