

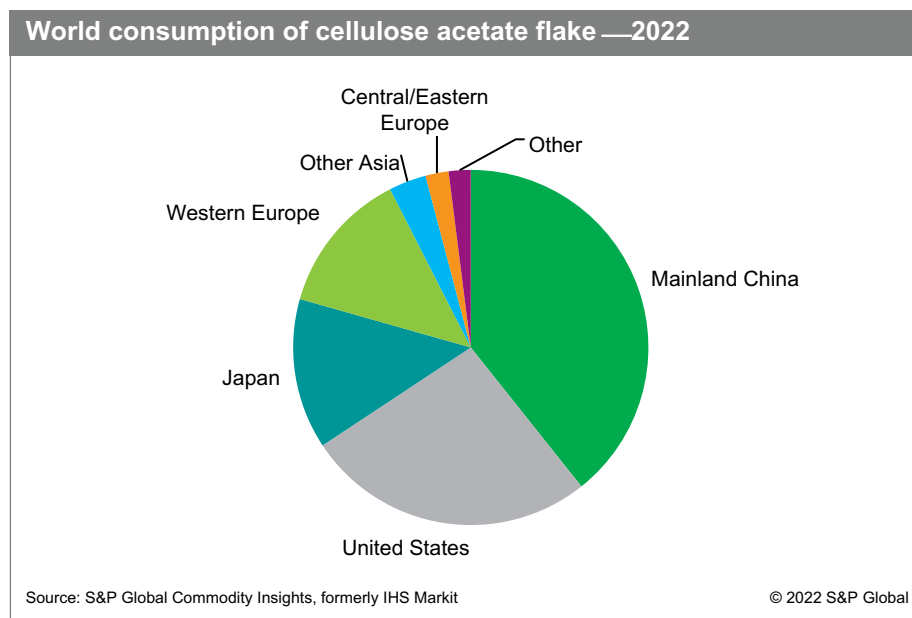
# Cellulose Acetate Flake

September 2022

## Abstract

Cellulose acetate flake is mostly consumed in one major application—the production of cellulose acetate fibers for conversion into cigarette filter tow and textile fibers. Cellulose acetate fibers account for the large majority of world consumption of cellulose acetate flake. Cellulose acetate molding and extrusion compounds, sheet, photographic film, coatings and inks, and cellulose triacetate for polarizer protection films used in liquid crystal displays (LCDs) account for the remainder.

The following pie chart shows world consumption of cellulose acetate flake:



World consumption of cellulose acetate flake declined between 2016 and 2019 but has been growing in the last two years. The largest consumption market for cellulose acetate flake is cigarette filter tow, and flake demand largely tracks world production of filtered cigarettes. Before 2019, cellulose acetate filter tow consumption was declining with the general decline of global cigarette use and changed smoking behaviors. However, the COVID-19 pandemic temporarily halted this decline in cigarette consumption as the increased anxiety and stress of the pandemic led to an increase in the number of smokers globally. .

Cellulose acetate flake consumption for textile fibers is also expected to see a slight growth, as most consumption is in apparel and home furnishings. Replacement by other textile fibers, especially polyester, has

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largely occurred. Global consumption of flake in coatings, plastics (molding and extrusion), film for liquid crystal displays, sheet, and so forth are expected to increase modestly. Higher growth will occur in mainland China, as domestic demand for film used in the LCD industry will continue to increase, although growth rates will be slower than previous years because of competition from other materials. Elsewhere, limited growth and even declines might take place for these markets owing to replacement by other materials that offer better cost or performance. There will be a continued decline in photographic film use.

Future growth for use in filter tow (and thus, flake) would come from the promotion of longer filters to reduce tar and nicotine levels even further. Moreover, increased production of filtered cigarettes in certain areas, or replacement of lower-quality filters with acetate filter tow would increase flake demand. However, enhanced smoking regulations, public health concerns about smoking, and competition from electronic cigarettes are expected to limit filter tow (and thus, flake) use in the future.

Continued decline in demand for cigarette filter tow is expected in North America, Western Europe, and Japan, while filter tow demand in mainland China (the largest global market) would only slightly decline.

For flake uses other than for cigarette acetate filter tow, growth could develop if demand for cellulose triacetate in polarizer protection films increases. New applications need to take advantage of characteristic properties of flake-based materials such as clarity, high-impact strength, being bio-based, and chemical and solvent resistance.

**For more detailed information, see the table of contents, shown below.**

**IHS Markit's Chemical Economics Handbook – *Cellulose Acetate Flake*** is the comprehensive and trusted guide for anyone seeking information on this industry. This latest report details global and regional information, including



Global summary;  
regional coverage



Producers with  
annual capacities  
and plant sites



Production figures  
and trends



Consumption and  
forecasts by end use  
application



Manufacturing  
processes and  
environmental issues



Trade – imports  
and exports

## Key Benefits

**IHS Markit's Chemical Economics Handbook – *Cellulose Acetate Flake*** has been compiled using primary interviews with key suppliers, organizations and leading representatives from the industry in combination with IHS Markit's unparalleled access to upstream and downstream market intelligence, expert insights into industry dynamics, trade, and economics.

This report can help you:

- Identify trends and driving forces influencing chemical markets
- Forecast and plan for future demand
- Understand the impact of competing materials

- Identify and evaluate potential customers and competitors
- Evaluate producers
- Track changing prices and trade movements
- Analyze the impact of feedstocks, regulations, and other factors on chemical profitability

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