

Specialty Paper Chemicals

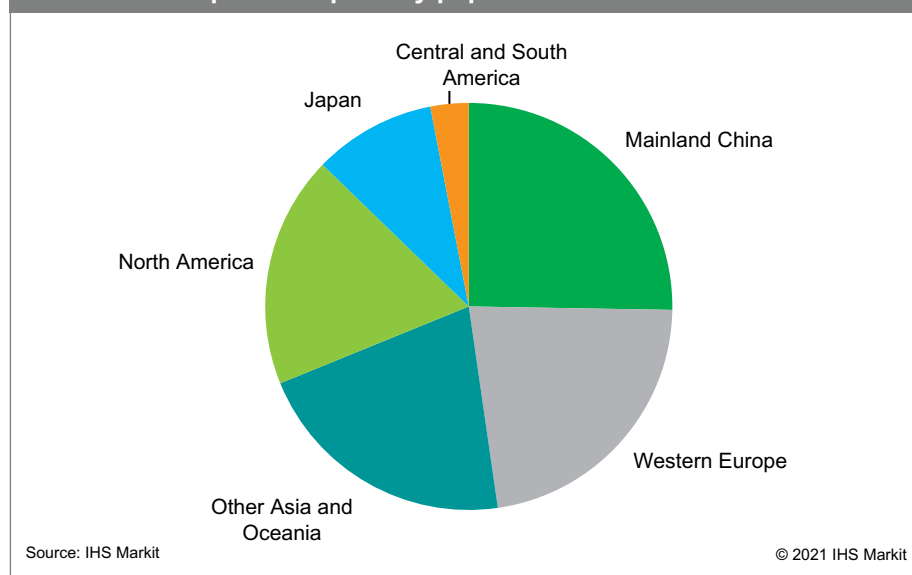
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Abstract

This report focuses on the specialty chemicals consumed in the processing of pulp and manufacture of paper. It excludes commodity chemicals such as chlorine and oxygen, hydrogen peroxide, sodium salts, and sulfuric acid (used mainly in pulp production), as well as fillers and pigments (mostly china clay and calcium carbonate). It also excludes water treatment chemicals used in the paper industry. Specialty paper chemicals fall into three categories: functional chemicals, processing aids, and pulp and fiber treatment chemicals.

The global consumption of specialty chemicals has been relatively flat for many years. Consumption has been impacted permanently by the shift from print to digital means of communication, which led to the closure of small, inefficient mills and the consolidation of the customer base. Demand for packaging and sanitary and household grades of paper continue to grow and drive the market, but overall, future growth will be very slow. In constant US dollar terms, specialty paper chemicals consumption on a global basis is forecast to grow at 1–1.5% annually over the next five years. Consumption is expected to decrease or remain static in the established regions of North America, Europe, and Japan. The prospect remains somewhat positive for Central and South America, mainland China, and the rest of Asia, but growth has slowed in these regions as well. Mainland China's consumption, which had averaged 6–6.5% per year in recent years, has slowed dramatically because of overcapacity in the paper industry and the government's push for stricter environmental compliance.

World consumption of specialty paper chemicals—2021



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

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IHS Markit's Specialty Chemicals Update Program – *Specialty Paper Chemicals* is the comprehensive and trusted guide for anyone seeking information on this industry. This latest report details global and regional information, including



Industry structure,
operating characteristics
and regulatory
environment



Products, functions
and markets



Cost structure/
profitability



Technology changes
and emerging
substitution practices



Quantitative market
analysis and forecasts

Key benefits

IHS Markit's Specialty Chemicals Update Program – *Specialty Paper Chemicals* has been compiled using primary interviews with key suppliers and organizations, and leading representatives from the industry in combination with IHS Markit's unparalleled access to upstream and downstream market intelligence and expert insights into industry dynamics, trade, and economics.

This report can help you

- Identify the competitive environment and key players
- Assess key issues facing both suppliers and their end-use customers
- Understand industry integration strategies
- Keep abreast of industry structure changes, regulatory requirements, and other factors affecting profitability
- Identify new business opportunities and threats
- Follow important commercial developments
- Recognize trends and driving forces influencing specialty chemical markets

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