

ABSTRACT FOR CELLULOSE FIBRES CONFERENCE 2024

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Title: **Man-made Cellulosic Fibre Value Chains in Transition**Łucja Wanicka (lucja.wanicka@afry.com)

Manager at AFRY Management Consulting, Finland

The man-made cellulosic fibre (MMCF) industry has been undergoing rapid transformation in response to the growing demand for more sustainable textile fibres. In this past decade, we have witnessed numerous new players entering the market and dominating players defending their positions by expanding their capacities and integrating vertically into the largest manufacturing cost component for their fibres: dissolving pulp (DP).

Interestingly, the DP industry itself, has also been undergoing a transformation – in the early 1990s, this pulp grade was a specialty product manufactured by only a handful of cost competitive players. By the 2010s, capacity significantly increased and today, the global cost curve for the sector is flattening because of rising wood costs in many regions across the globe. At the same time, innovations using alternative feedstocks, particularly textile waste and agricultural residues, are gaining traction, responding to the call of a more circular textile economy.

How will these developments impact textile value chain dynamics? And what it could mean for MMCFs being in competition with synthetics?

Speaker bio: Ms Wanicka joined AFRY Management Consulting in 2019 and currently leads the textile industry competences at the division. She has more than 8 years of work experience in the biorefinery sector and has previously worked for world leading pulp and textile fibre companies in South Africa and Austria. Ms Wanicka holds a Master of Engineering degree (University of Pretoria) as well as an MBA (Aalto University Executive Education) and is based in Finland.