

# TENDÊNCIAS SETORIAIS 2003

## Mercado de fibras de eucalipto

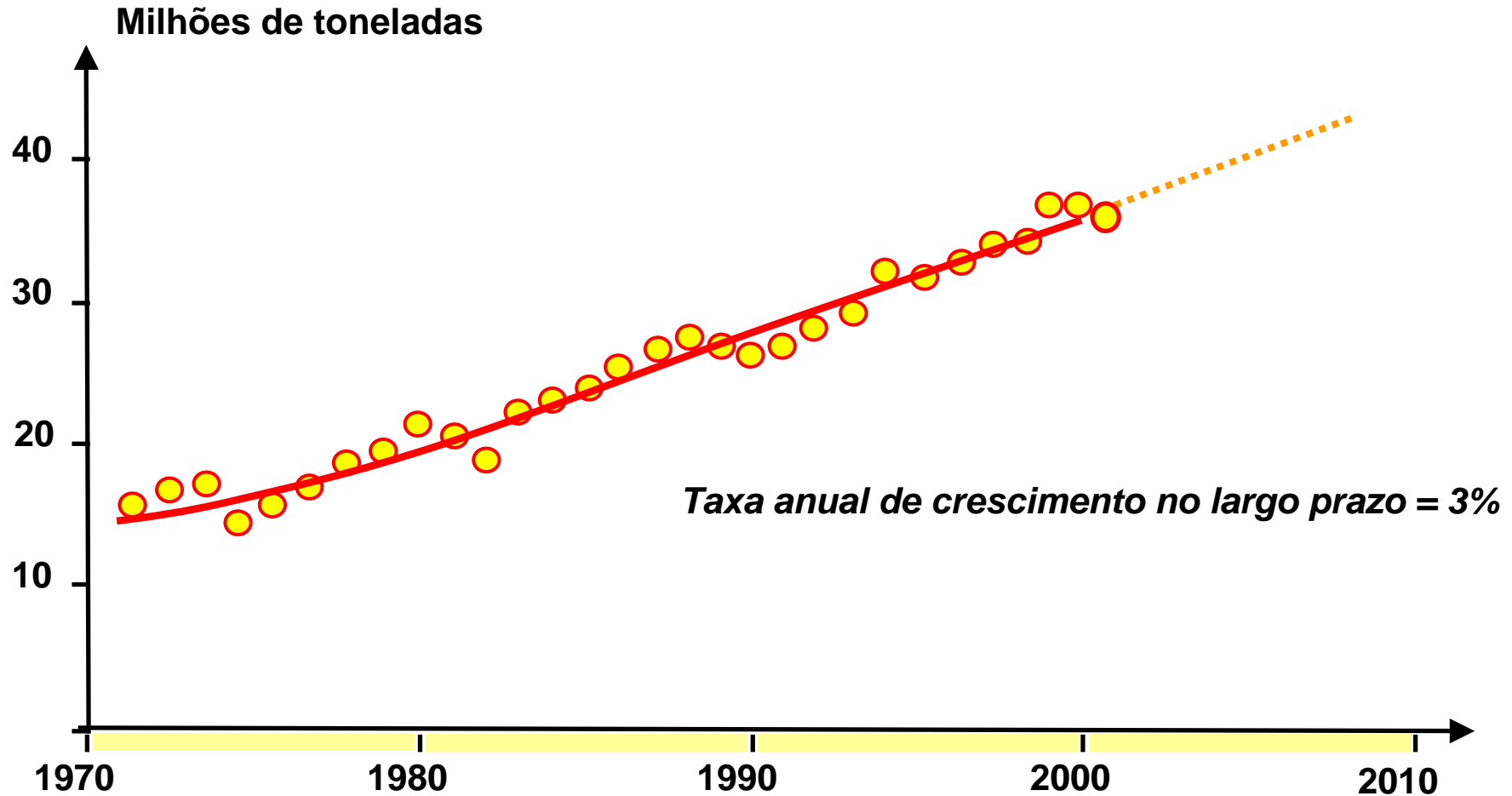
**Celso Foelkel**  
**[www.abtcp.org.br](http://www.abtcp.org.br)**





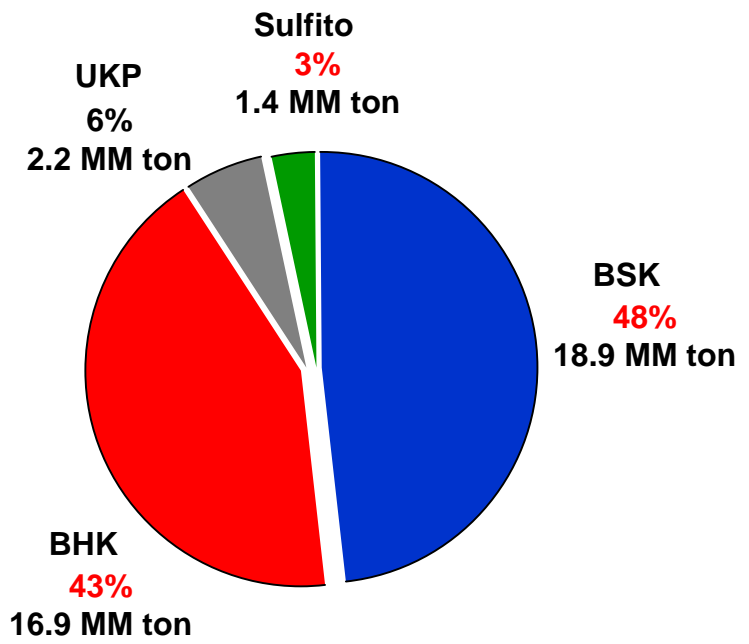
## Desarrollando amistades sostenibles entre Brasil y Chile

# DEMANDA POR POLPA BRANQUEADA DE MERCADO

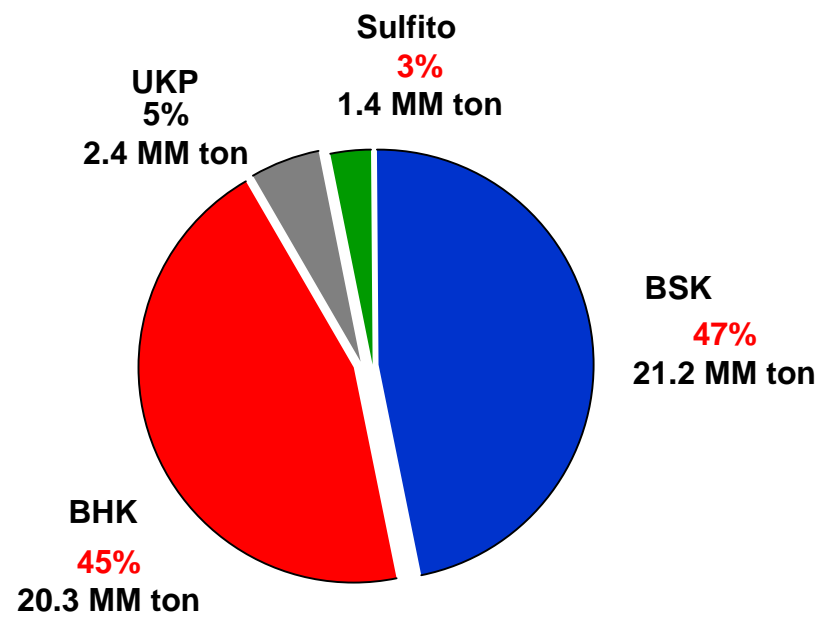


# DEMANDA DE POLPAS QUÍMICAS DE MERCADO

**2001**



**2006(estimado)**



**Total 39.4 MM tons**

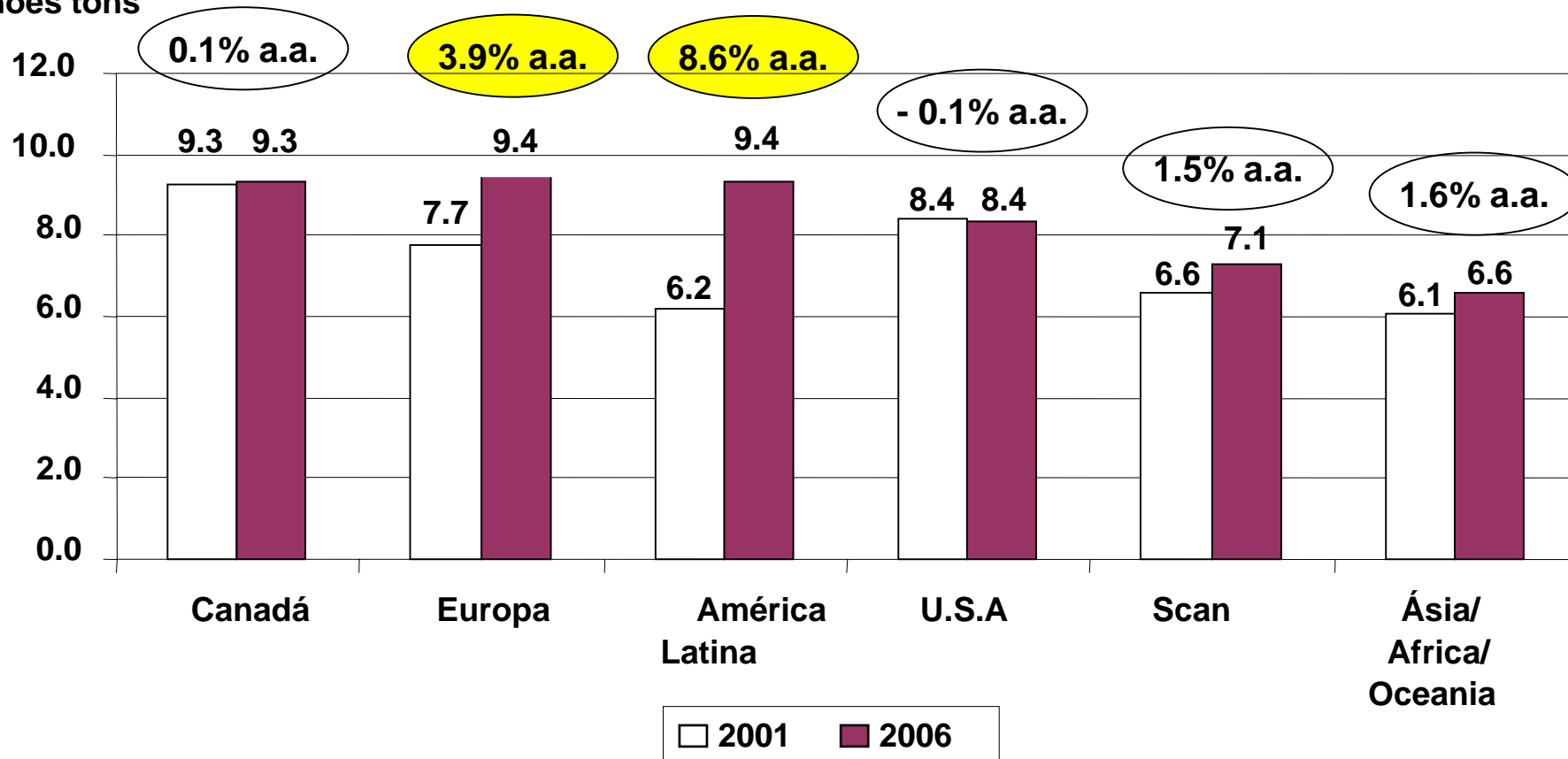
**+2,8% a.a.  
or  
+5.9 MM tons**

**Total 45.3 MM tons**

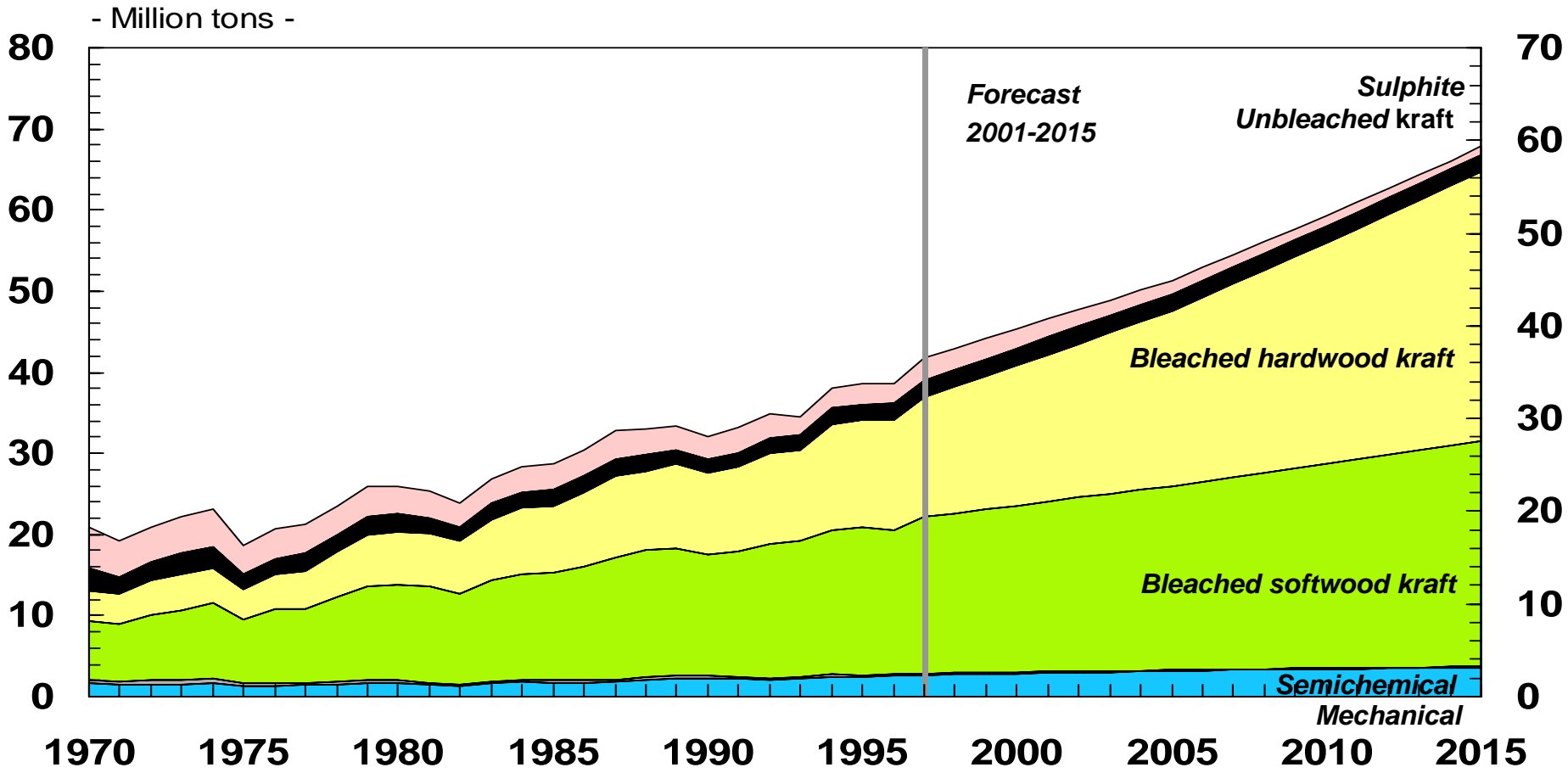
# AMÉRICA LATINA ENTRE AS REGIÕES QUE MAIS CRESCERÃO

## CAPACIDADES TOTAIS DE BCMP

Milhões tons



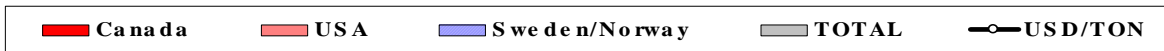
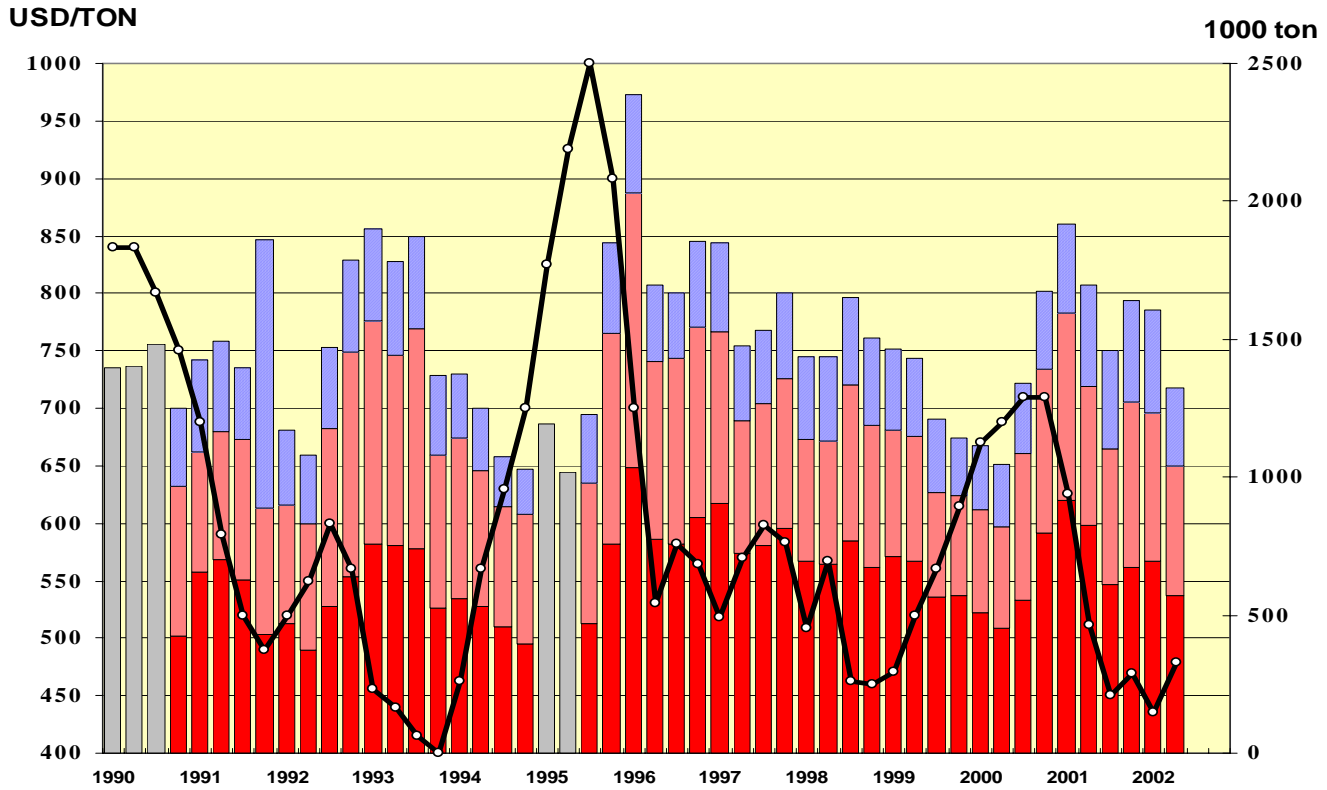
# DEMANDA MUNDIAL DE CELULOSE DE MERCADO POR PRODUTO – 1970 A 2015



# Preços e estoques

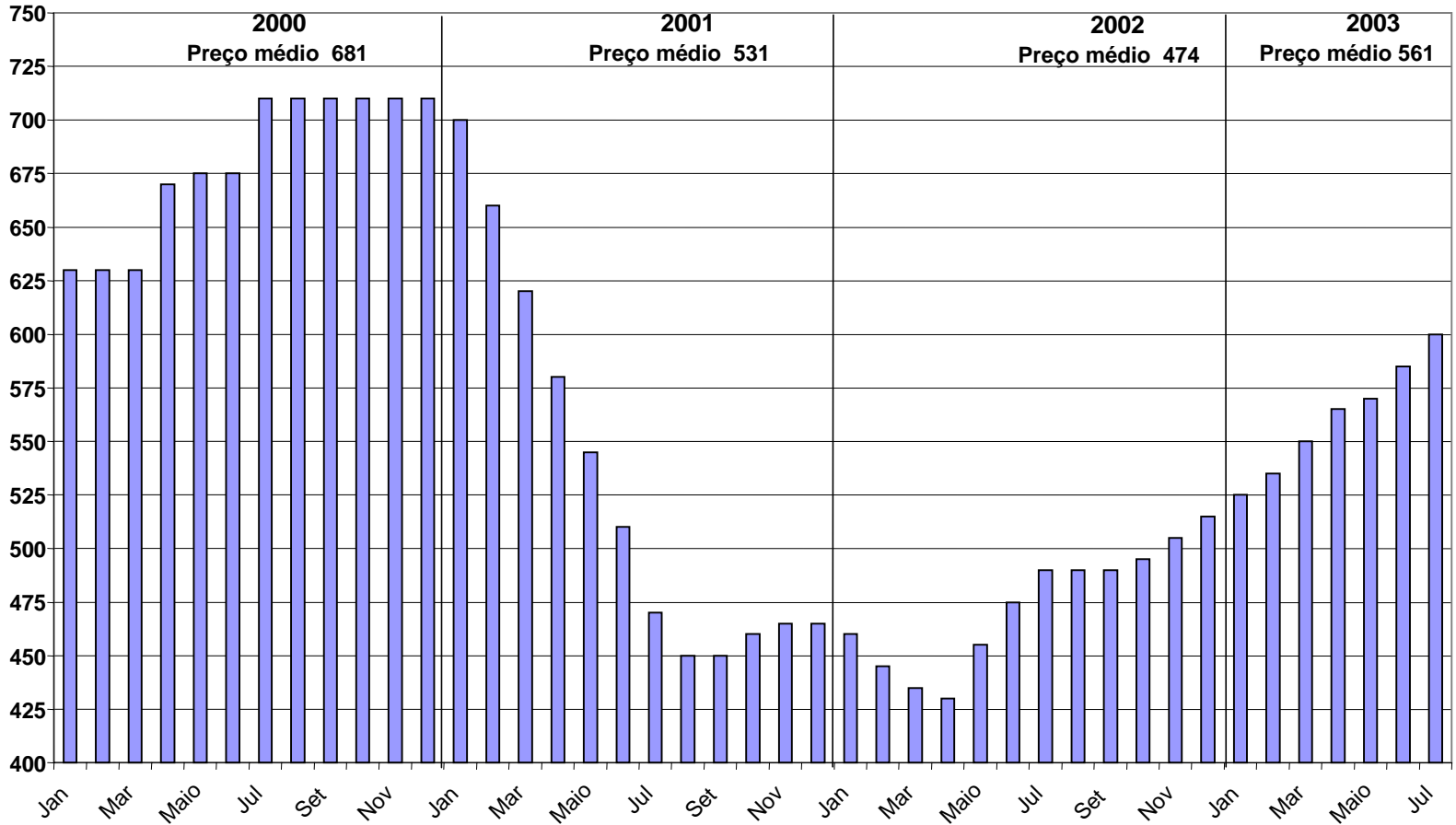
Estoques

Preços  
USD/TON



# Preços de celulose

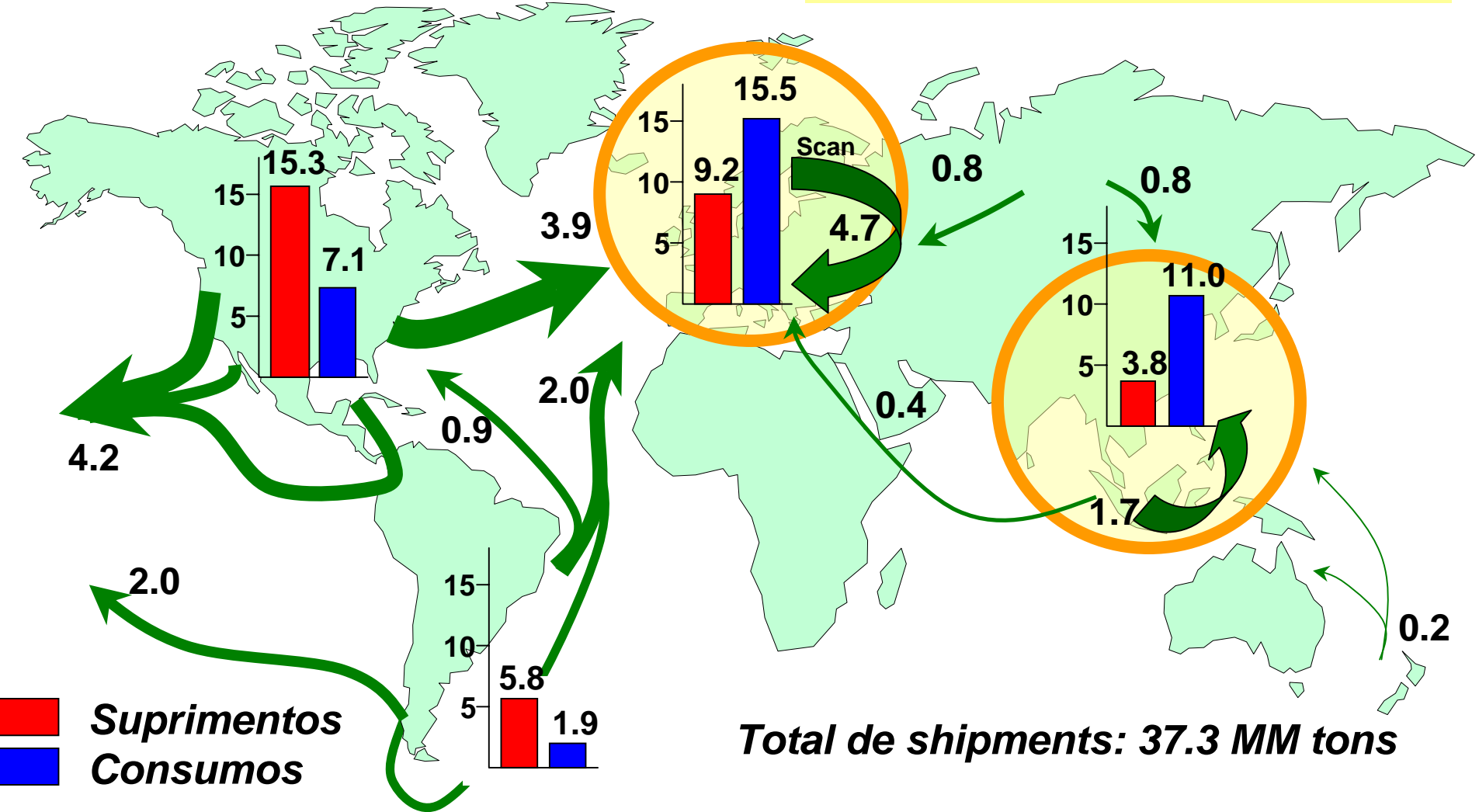
CIF porto europeu  
USD/Ton



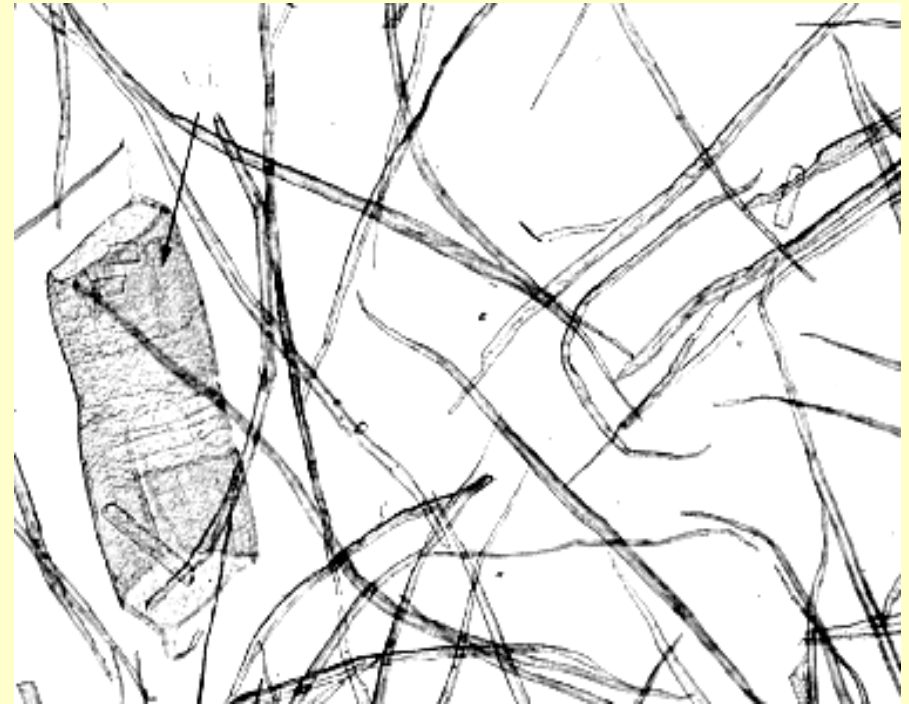
Fonte:RISI

# SHIPMENTS DE POLPAS BRANQUEADAS DE MERCADO EM 2001

*Shipments de polpas de mercado*

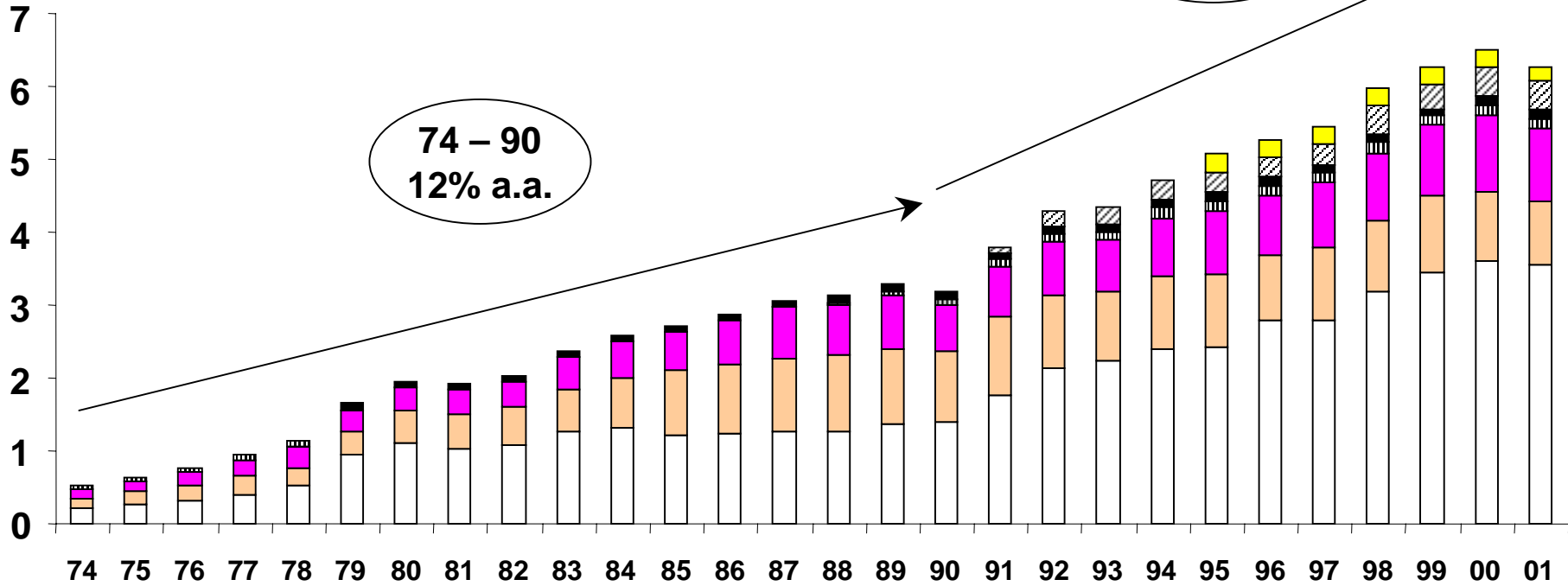


# O EUCALIPTO E ESSAS FIBRAS MARAVILHOSAS



# PRODUÇÃO HISTÓRICA DE POLPAS DE EUCALIPTO

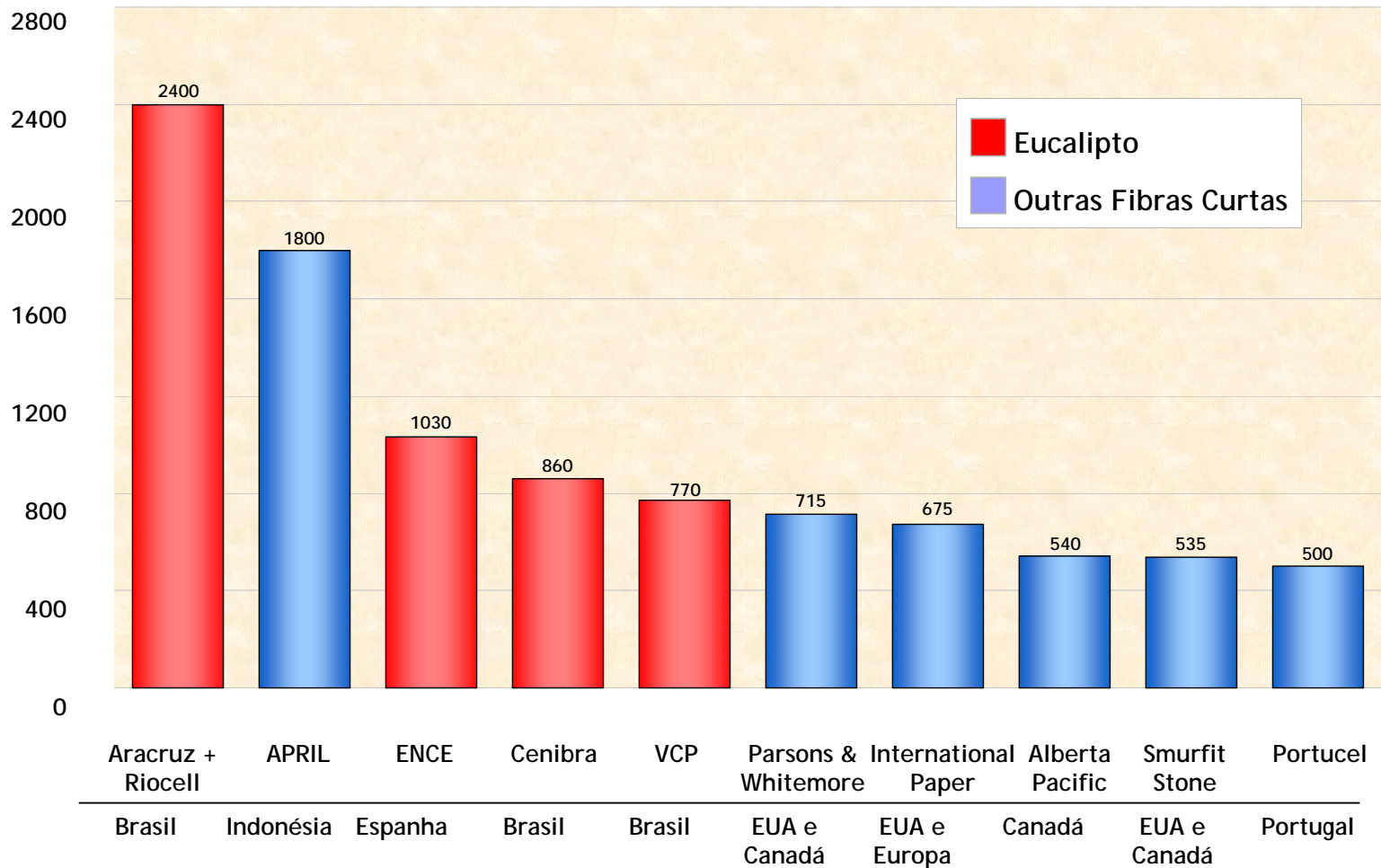
MM tons



Brasil Portugal Espanha Noruega Marrocos Chile África do Sul

# BHKMP - Produtores de fibra curta kraft branqueada de mercado

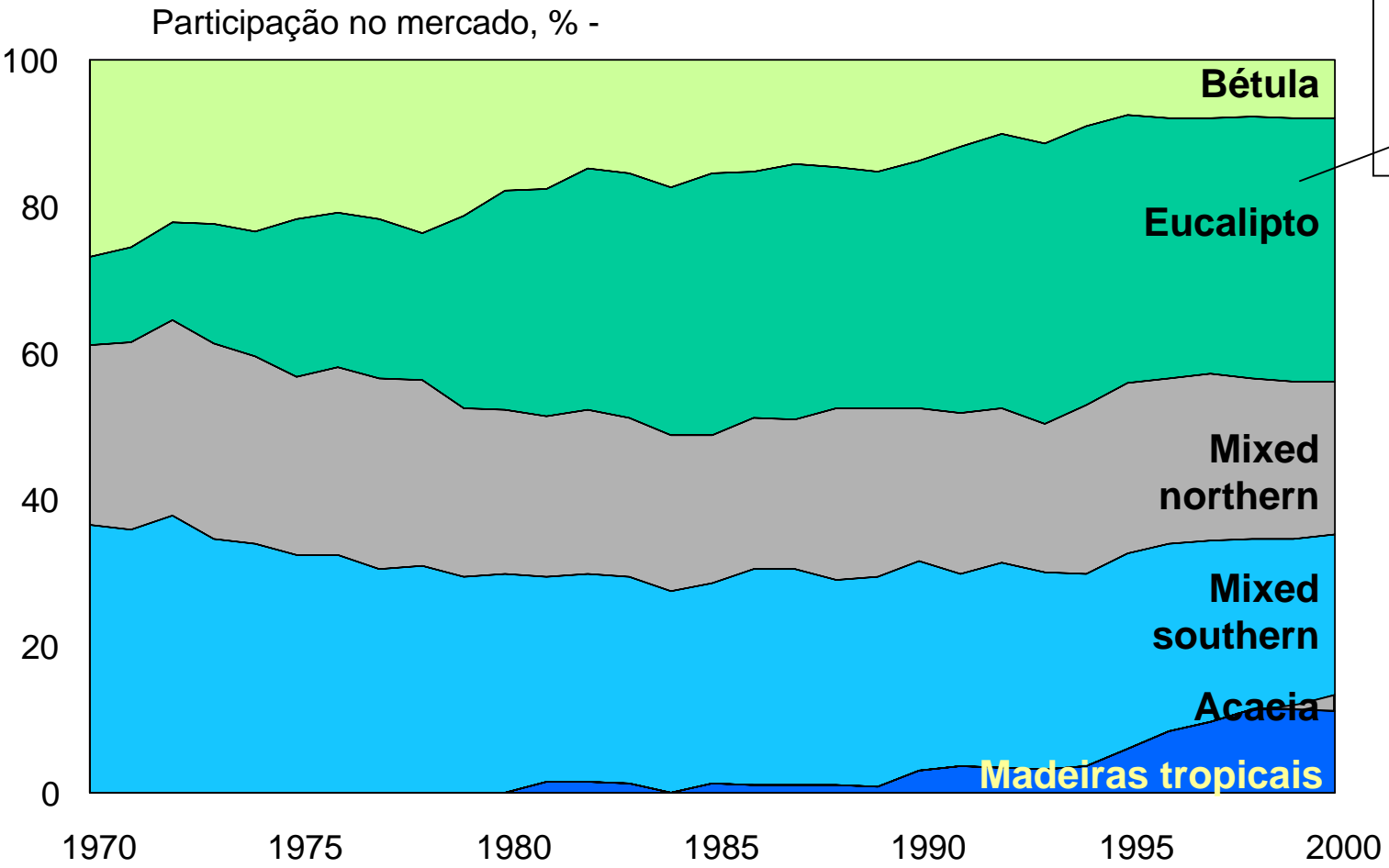
Capacidade 2003 ( 1000 ton/ano)



Fonte: Hawkins Wright (abril 2003) e Aracruz

# QUEM CRESCE E QUEM PERDE ?

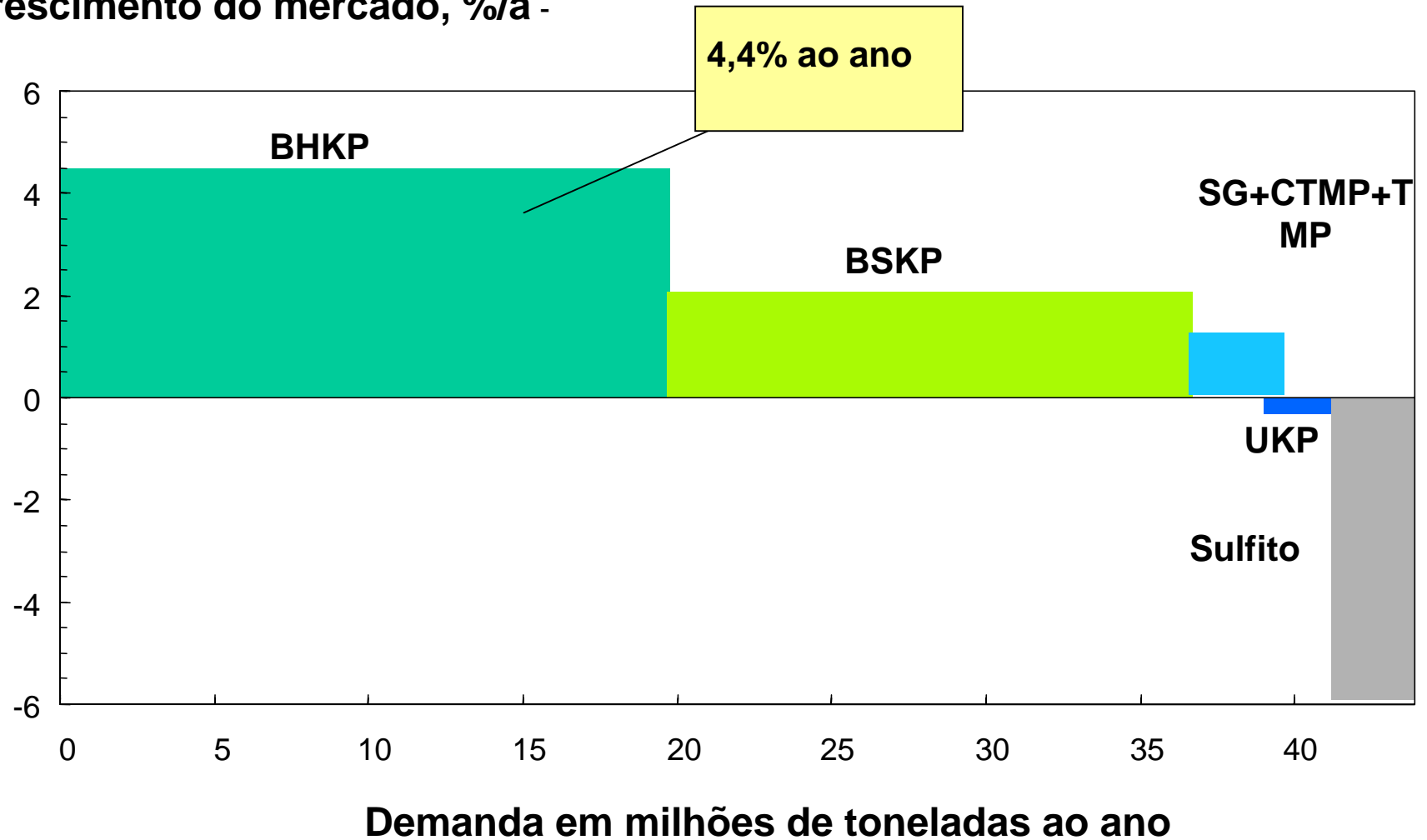
## Consumo de BHKP no mundo



Eucalipto já é 40% do total de BHKP

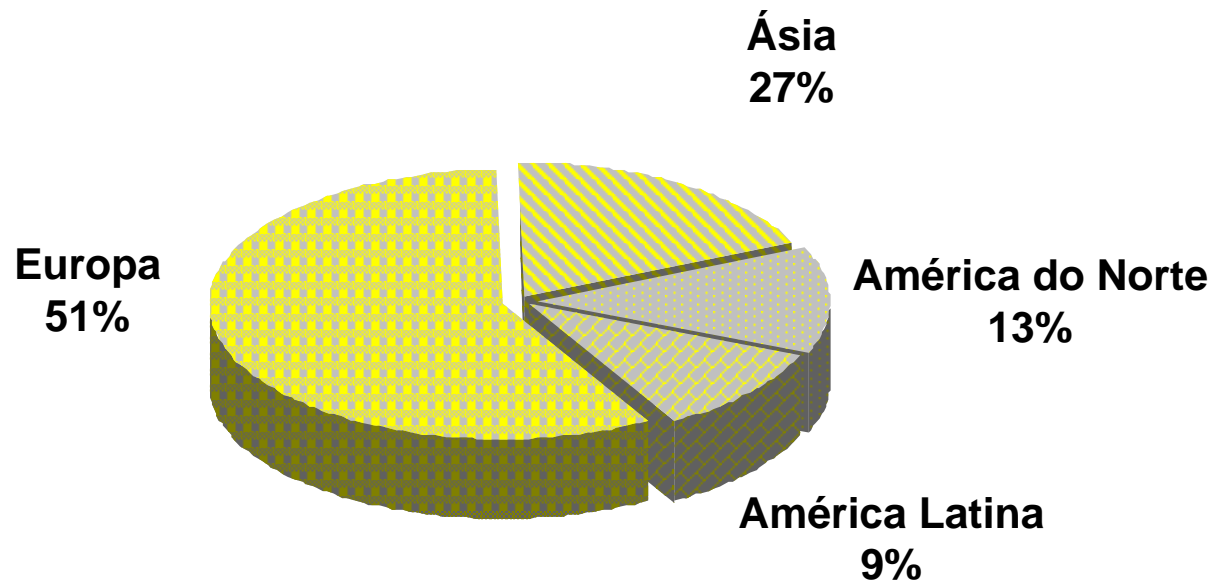
# CAPACIDADE DE FABRICAÇÃO DE CELULOSE BRANQUEADA DE FIBRA CURTA JÁ ALCANÇA CERCA DE 20 MILHÕES DE TONELADAS

- Crescimento do mercado, %/a -

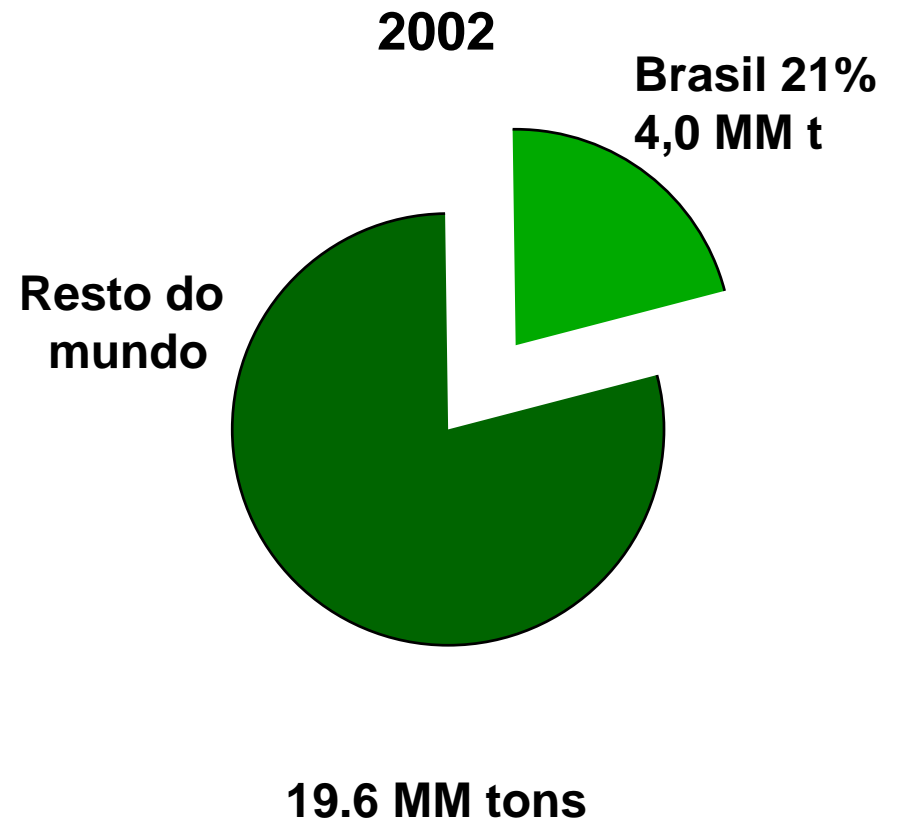
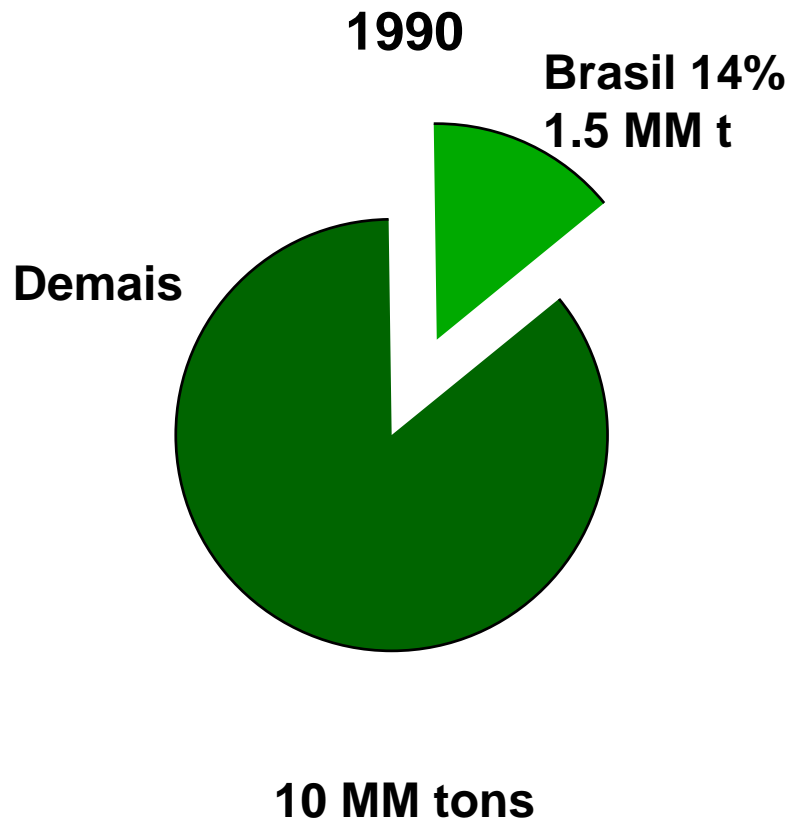


# POLPA DE MERCADO BRANQUEADA DE EUCALIPTO

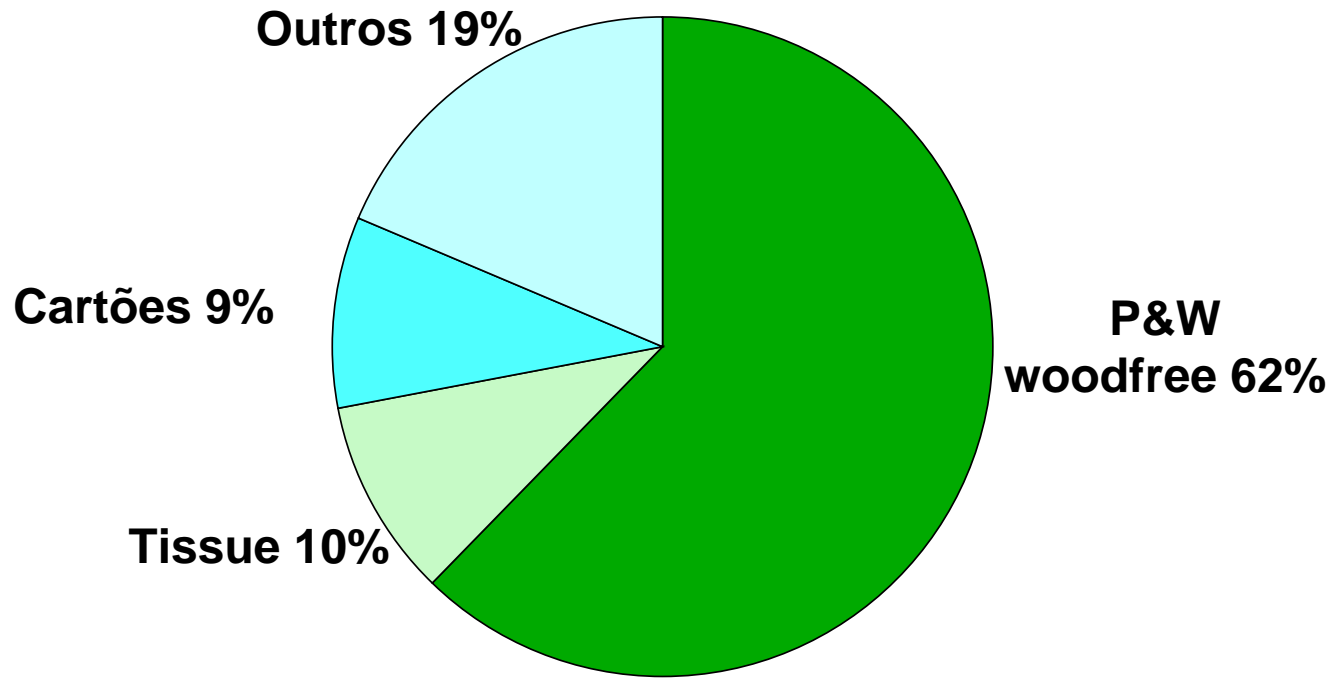
## DEMANDAS POR REGIÃO



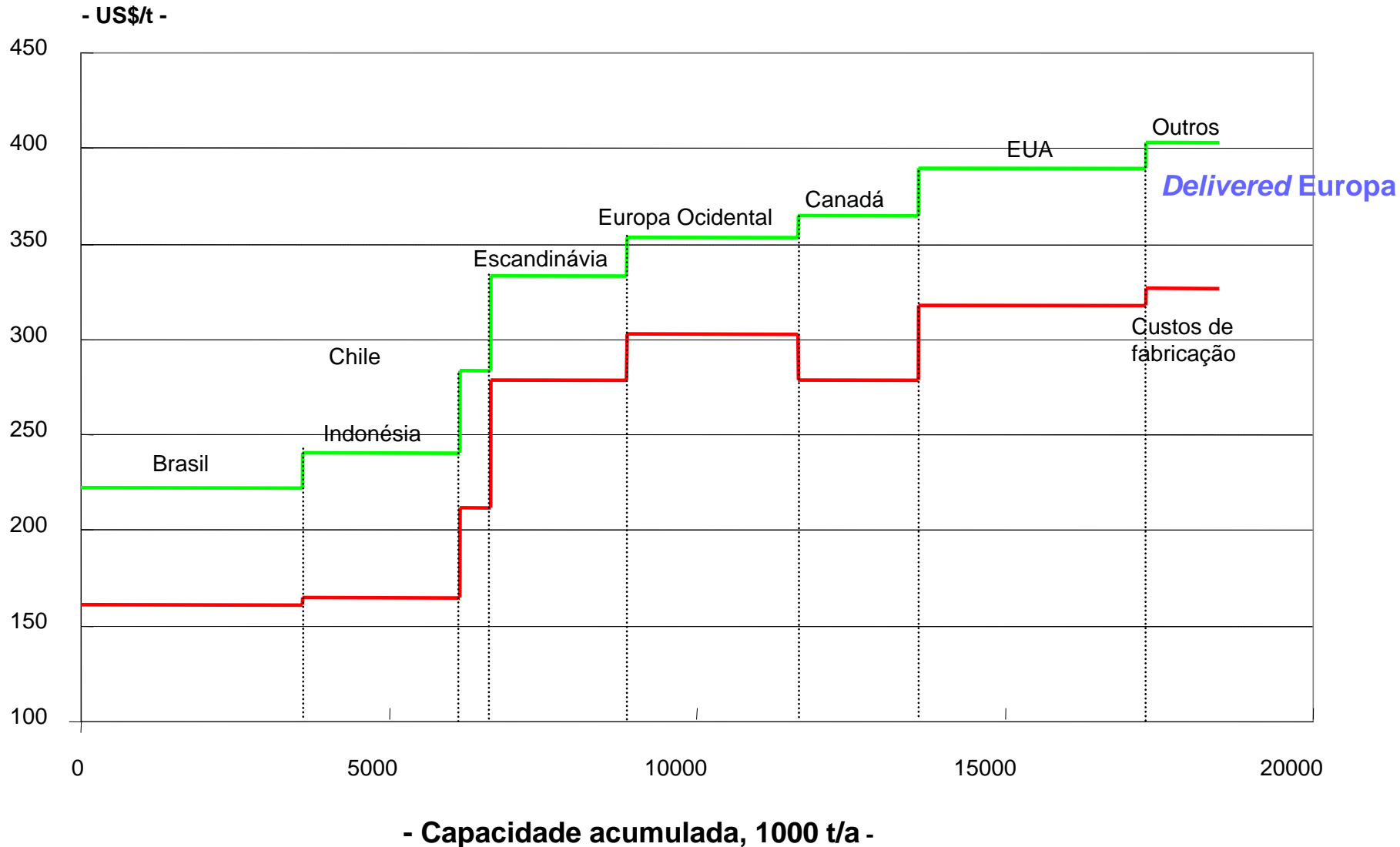
# MAIS DE 20% DO MERCADO DE BHKP PERTENCE AOS BRASILEIROS



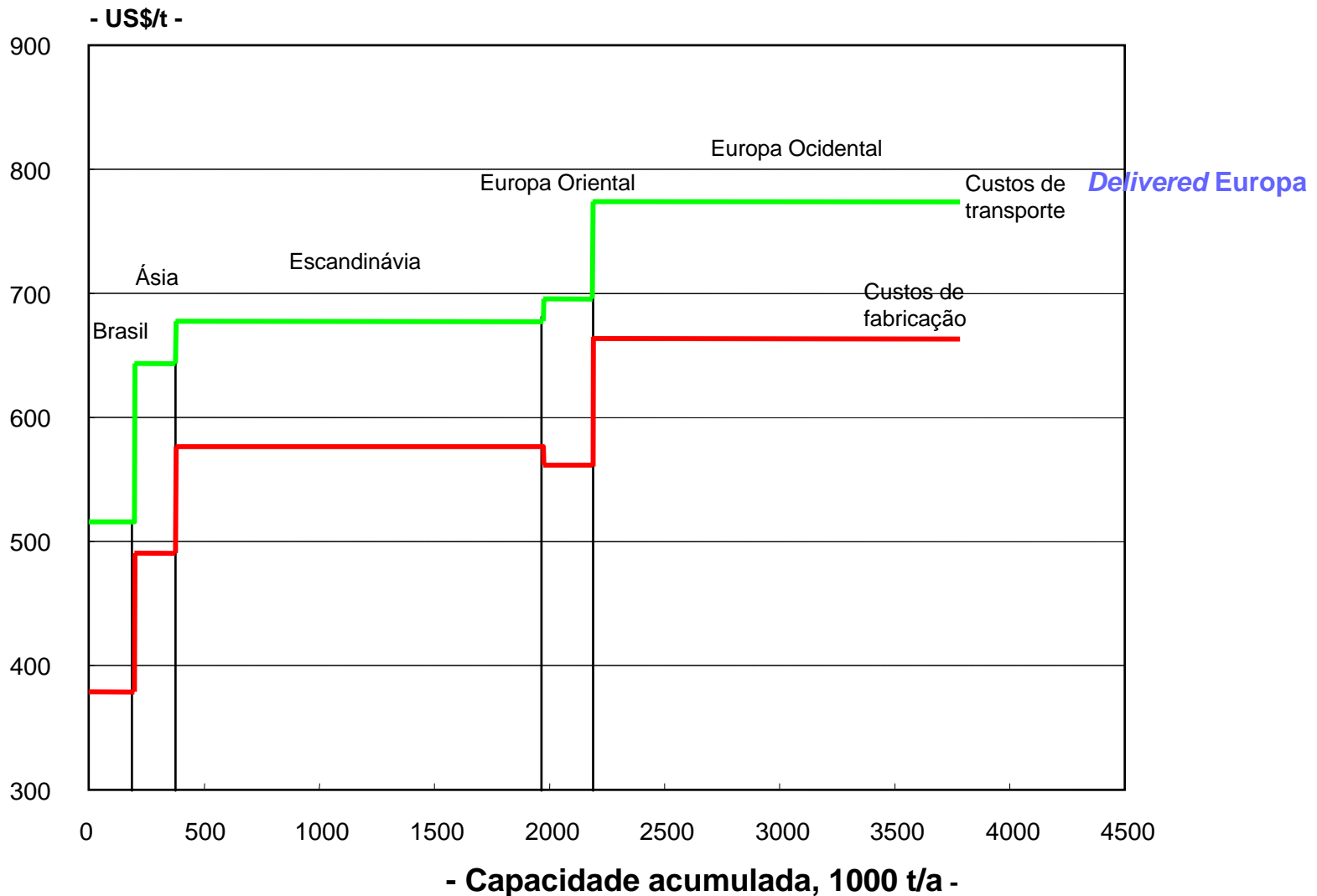
# USOS NA EUROPA PARA AS CELULOSES DE MERCADO DE EUCALIPTO



# CELULOSE DE FIBRA CURTA BRANQUEADA DE MERCADO – COMPETITIVIDADE DE CUSTOS POR REGIÃO



# PAPEL P&W WOOD-FREE (PAPEL PARA CÓPIAS) - COMPETITIVIDADE DE CUSTOS POR REGIÃO



**Gracias hermanos chilenos  
y  
buena suerte con los eucaliptos**

