

## **Towards a cellulose-based society – current market and consumer trends**

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The traditional research in pulp and papermaking is still strong and it attracts a lot of interest. At the same time, we are experiencing a development towards a future based on research in biomaterials, the bio-based society, and a future bio-economy built on the concept of circular economy. Industrial stakeholders and politicians alike are presenting the forest as the new “green gold”, which should contribute to the solution to the climate issue, at least partially. Raw materials from the forest industry are acquiring a clearer role in the solution to major global societal and environmental issues at all levels. There is a great need to maintain research for a future in which the traditional value chains of the forest industry are combined with the needs and demands of a bio-based economy. In such a future, the pulp mill biorefinery may be a crucial node. The road ahead will need to be identified and demonstrated, inspired by opportunities and challenges that society is facing.

In order to map the road from a fossil-based society to a cellulose-based society, a global consumer survey has been made. In addition, interviews and workshops with various players throughout the bio-economy field have been accomplished. Further sources include in-depth literature studies and research reviews. Based on the input from these sources, several current trends that affect the road to a cellulose-based society have been identified. These trends are describing the effects of urbanization, consumer behaviour, new business models, material recycling, open innovation, and the need for early demonstration of new research. The trends have been combined with uncertainties such as oil price, geopolitical stability and pace of innovation into four different but equally plausible scenarios describing the society and the role of cellulose in the year 2030.

In this presentation results from the global market survey will be presented together with selected trends affecting the road towards the cellulose-based society. They will be discussed in the perspective of the scenarios for 2030 and the role of the wood-based biorefinery.