

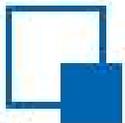


消费淡季将过，纸浆盘面或有变

长安期货 投资咨询部

2021年6月22日

刘 娜 投资咨询资格证号：Z0015395



一、行情概述



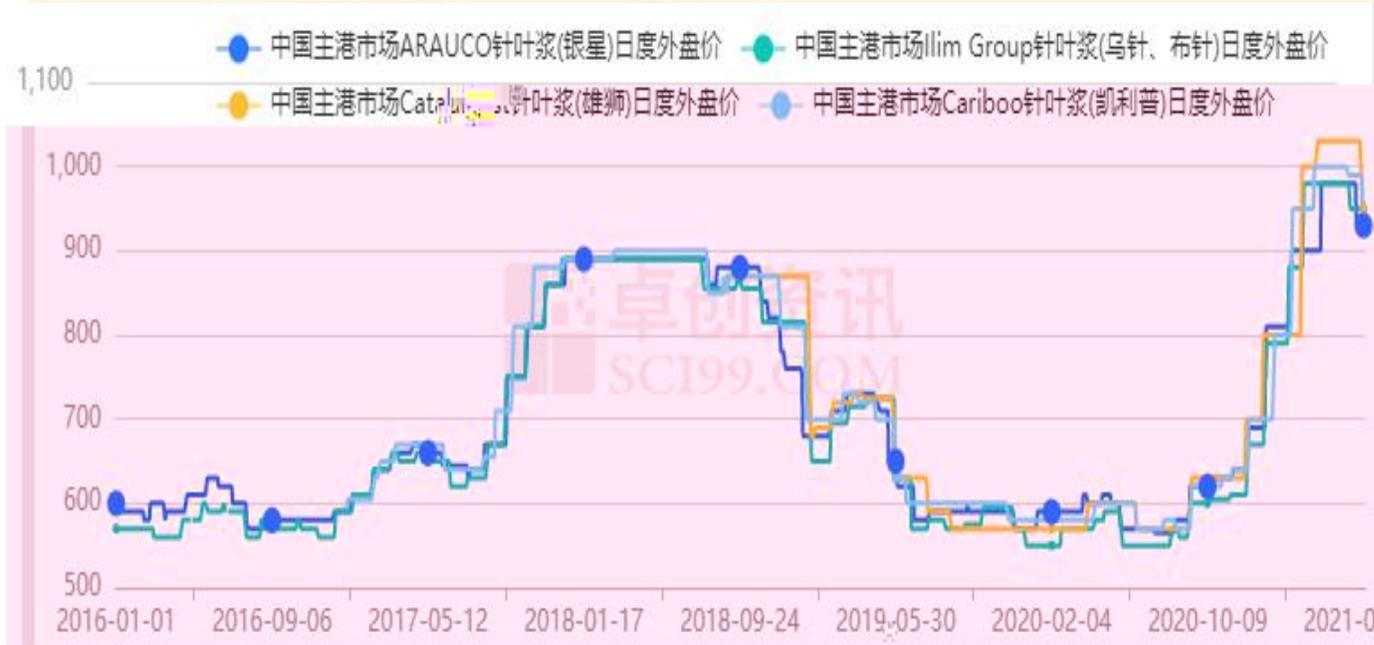
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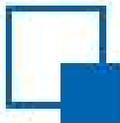
纸浆2109^M (SHFE sp2109) 日线



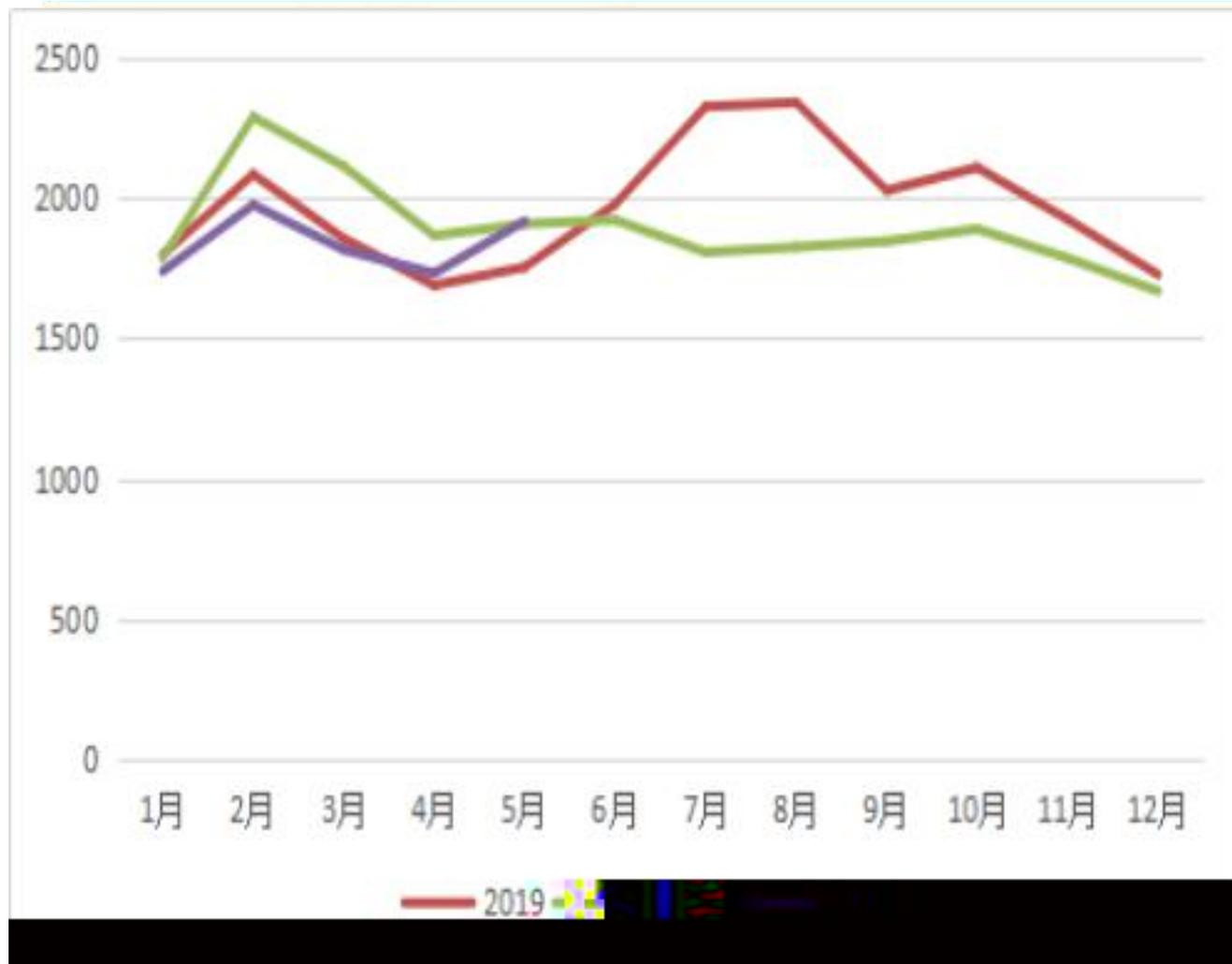


二、现货价格：整体处于中高位水平



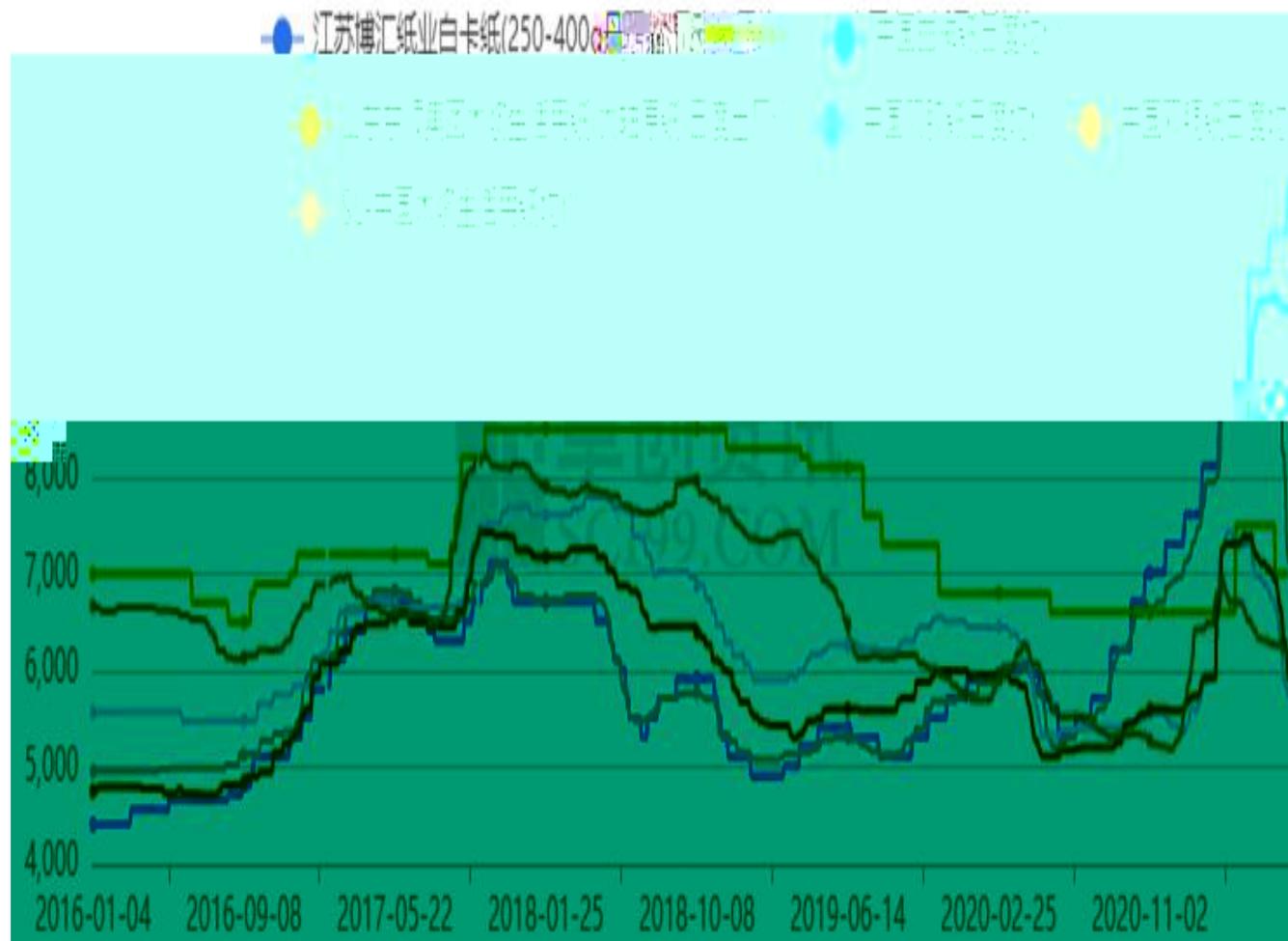


三、中国纸浆港口库存：



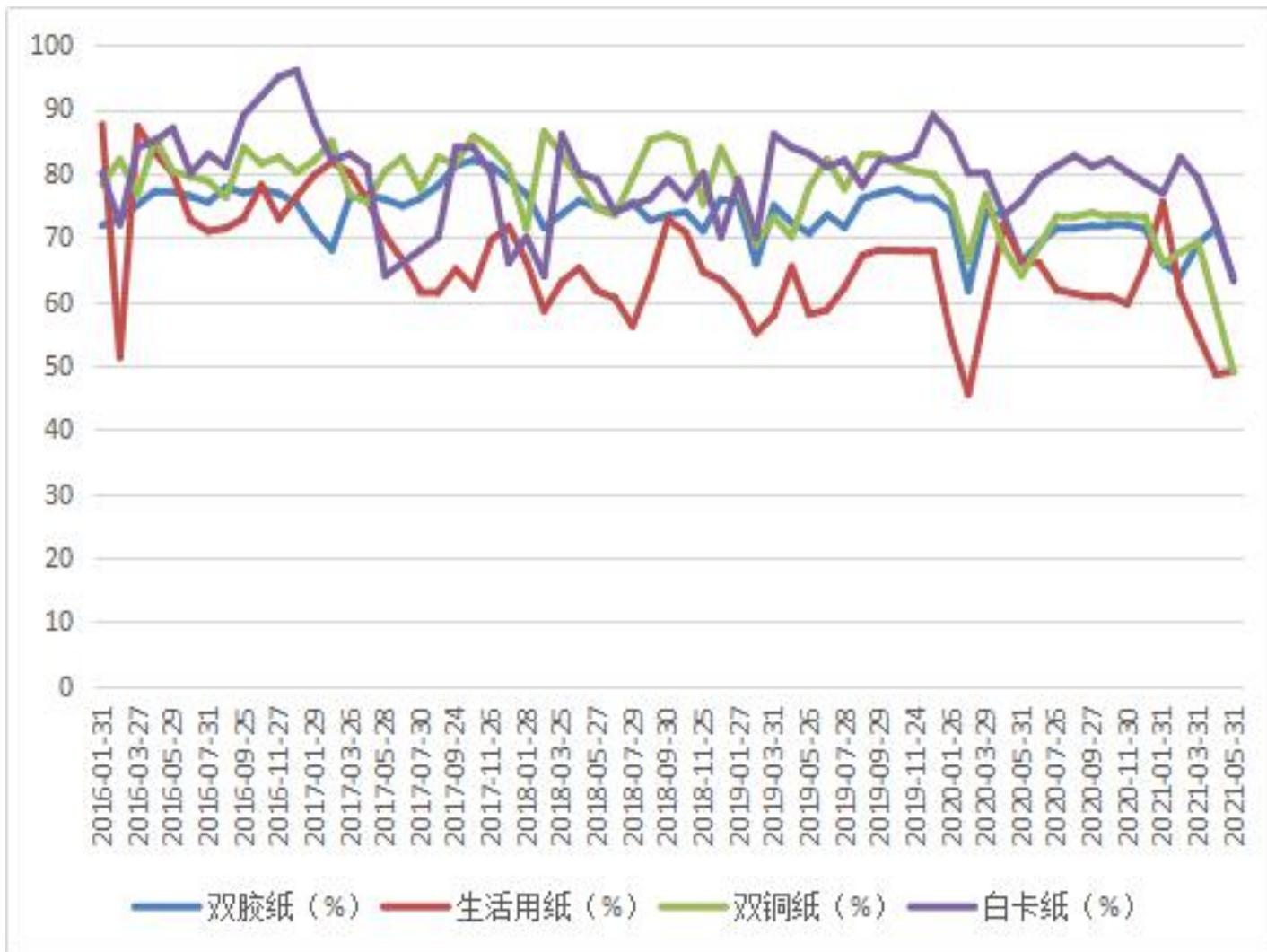


三、下游纸制品价格：



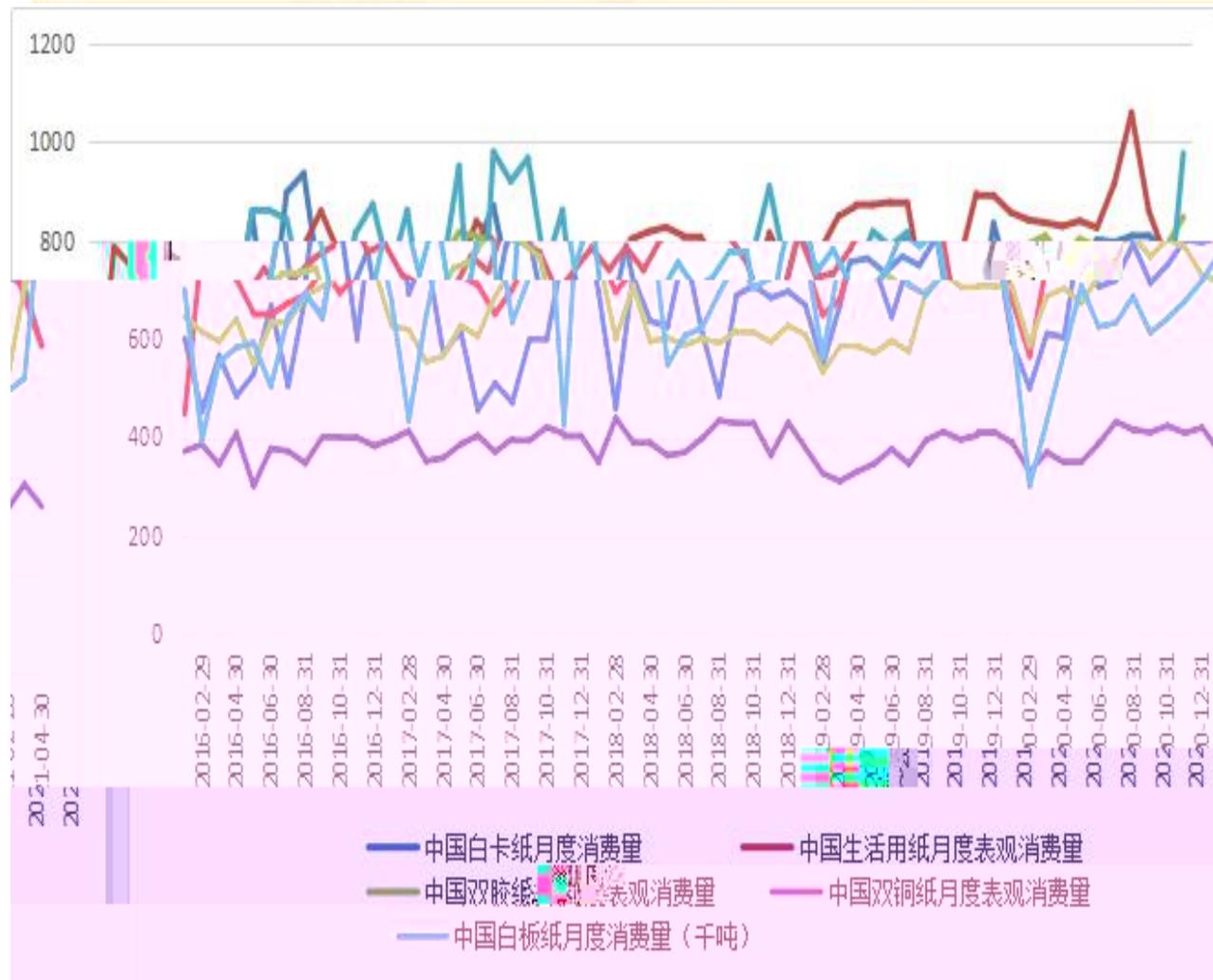


四、下游消费：纸制品的开工负荷





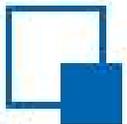
五、下游纸品表现消费





五、下游纸品的社会库存

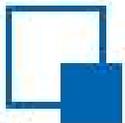




六、结论



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