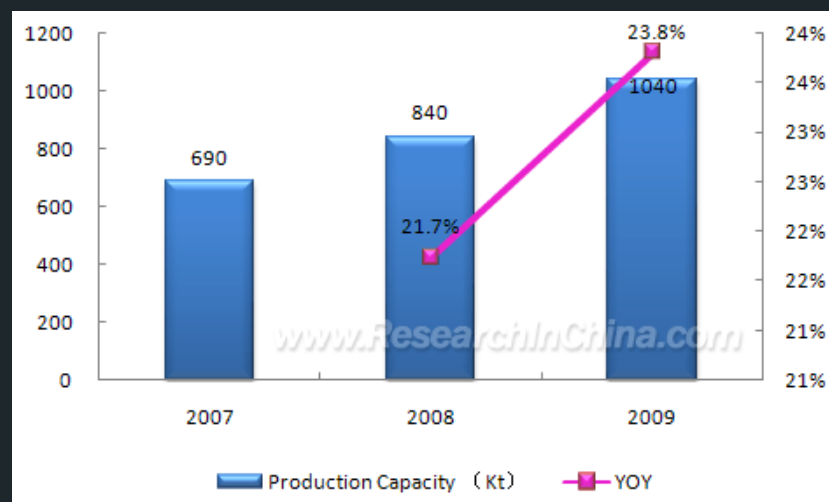


# Global and China Styrene Butadiene Rubber (SBR) Industry Report, 2010



During the recent years, the global capacity of styrene butadiene rubber (SBR) has experienced slow growth, with increment primarily from the Asia-Pacific region where the automotive sector is developing rapidly, especially in China. The capacity of SBR in China totaled 740 kilotons in 2007, 840 kilotons in 2008, and 1.04 million tons in 2009, up 23.8%YoY. Promisingly, it will reach 1.24 million tons in 2010.

## SBR Capacity in China, 2007-2009



Source: ResearchInChina

In 2009, fueled by robust growth in the output of automobiles and consumer durables, the apparent consumption of SBR in China arrived at 1.132 million tons. Of which, China Petroleum & Chemical Corporation (Sinopec) and China National Petroleum Corporation (CNPC) enjoyed market share of 28% and 27% respectively, while imports took 28.5%, accordingly, the imported SBR played a decisive role as the insufficient capacity in China brought along the massive export from countries like South Korea, Russia, and Japan. Along with the rapid capacity expansion of SBR in China, the domestic self-sufficiency rate will continue to rise and the import will tend to decline.

The report not only probes into the output & sales of SBR, consumption structure & development trend, SBR industrial segments, import & export, the influence of upstream & downstream development on SBR industry, etc. but also analyzes the global key SBR enterprises, present Chinese SBR enterprises and the projects under construction.

The world's large SBR manufacturers concentrate in developed countries and regions such as Europe & America, Japan, and South Korea, mainly Goodyear Tire & Rubber Company, Ente Nazionale Idrocarburi (ENI), Korea Kumho Petrochemical Co., Ltd. (KKPC), and JSR Corporation. The SBR enterprises in developed countries are characterized by large capacity, relatively abundant SBR varieties, and high product performance. The products get primarily applied in high-grade tires.

Chinese SBR enterprises mainly cover SINOPEC Qilu Company, YPC-GPRO (Nanjing) Rubber Company Limited (YGC), and SINOPEC Shanghai Gaoqiao Petrochemical Corporation, Jilin Chemical Group Company, Lanzhou Petrochemical Corporation, and Dushanzi Petrochemical Co., Ltd, as well as joint ventures like Shen Hua Chemical Industrial Co., Ltd. (a subsidiary in mainland China of Taiwan-based TSRC Corp.) and Bridgestone (Huizhou) Synthetic Rubber Co., Ltd. (a Japanese-funded enterprise). Consisting of Hangzhou Zhechen Rubber Co., Ltd., Tianjin Lugang Petroleum Rubber Co., Ltd., Fujian Meizhou Bay Chlor-Alkali Industry Co., Ltd., etc., the private businesses have further activated the SBR market competition by virtue of their strong learning ability and flexible system.

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