



**China Synthetic Rubber Industry Report,
2010-2011**

May 2011

This report

- ◆ **Analyzes global and China's synthetic rubber market.**
- ◆ **Focuses on the key market segments of synthetic rubber and raw materials market of synthetic rubber in China.**
- ◆ **Highlights the operation of key enterprises of China synthetic rubber industry.**

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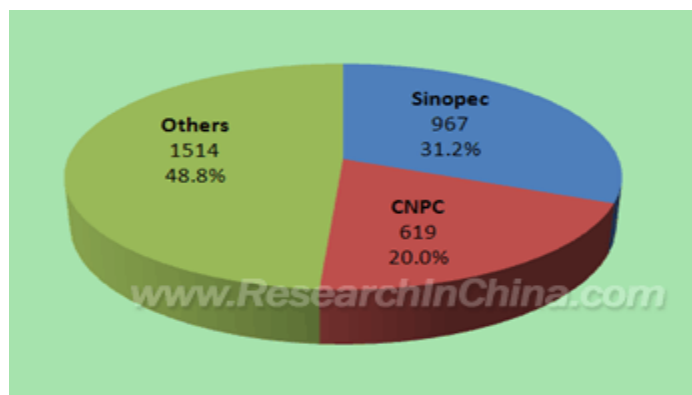
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Abstract

Driven by the related industries such as automotive industry and shoemaking industry, China synthetic rubber industry presents vigorous development. In 2010, the output of synthetic rubber exceeded 3.1 million tons in China, a 12.5% YoY rise. Thanks to the raw material advantage, outputs of Sinopec and CNPC accounted for 31.2% and 20% of the total output, respectively.

Competition Pattern of Synthetic Rubber Industry in China (by Output), 2010 (Kiloton)



Source: ResearchInChina

Apart from the projects of Sinopec and CNPC, production facilities invested by Taiwanese and foreign-funded enterprises also occupied large shares of the total. Specifically, the total synthetic rubber (including BR, SBR, SBS) capacities of TSRC Corporation achieved 258 thousand tons in 2009, accounting for 7.3% of the total capacity of the year 2009. In addition, as for NANTEX Industry & LCY Chemical Corp., they have shifted their business focus from Taiwan to mainland China.

However, the tremendous demand for synthetic rubber in domestic China cannot still be fulfilled and a large volume of synthetic rubber was imported annually, although the capacity has been steadily improved in Chinese Mainland. In 2010, the import volume of synthetic rubber accumulated to 1,565 thousand tons, approximately half of the domestic output.

According to the synthetic rubber projects planned and under construction in China, the newly increased capacity will hit 2,000 thousand tons/ year in 2014. Furthermore, with the continuously expanded capacity, the import volume of synthetic rubber will by degrees shrink, whereas the export volume will increase in the next 2-3 years.

In terms of the market segments, BR and SBR are the most widely used synthetic rubbers with the highest demands. In 2010, 30.5% of the synthetic rubber produced in China was SBR, and 17.7% was BR. By contrast, due to technical constraints, outputs of NBR, IIR, EPR and other specialty rubber were limited in a relative sense.

For instance, by the end of 2010, there was only one 20,000 ton/year EPR facility in China, which belongs to CNPC Jilin Company. On account of the bright prospect of EPR, many international manufacturers are planning to invest new EPR production facilities in China, such as Mitsui Chemicals and LANXESS. It is expected that the capacity of EPR in China will reach 150,000-200,000 tons in 2014, on that occasion, supply-demand contraction will be eased to a large extent in domestic China.

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