STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.

◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.

◆ To complement the organizations’ internal competitor information gathering efforts with strategic analysis, data interpretation and insight.

◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.

◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include the China Natural Rubber Association, National Bureau of Statistics of China and China Customs etc.
Abstract

Natural rubber usually refers to the elastic solid substance via processing of natural rubber latex collected from Hevea brasiliensis. According to form, it can be divided into solid natural rubber (involving smoked rubber sheet, standard rubber, etc.) and concentrated latex, mainly used in tires, hose products and other sectors.

As a typical resource-constrained industry, natural rubber is subject to region, primarily planted in Southeast Asia and parts of Africa. Thailand, Indonesia, Malaysia, India and Vietnam are the world’s five major natural rubber producing countries, altogether accounting for 84.5% of the global production in 2011, and oriented by standard rubber. Global natural rubber supply and demand were roughly balanced in 2011, respectively reaching 11 million tons and 10.9 million tons. China, the largest consumer of natural rubber worldwide, occupied 34% of the world’s total consumption in 2011. From 2005 to 2011, there was a rather huge gap between supply and demand of natural rubber in China, with self-sufficiency rate of less than 20%, and mainly dependent on import. Indonesia, Thailand and Malaysia are China’s main source countries of natural rubber, accounting for about 90% of China’s total import volume. China’s total output of natural rubber in 2011 stood at 707,000 tons, of which, Hainan, Yunnan and Guangdong provinces altogether occupied over 98%.

Sinochem International Corporation, Hainan Rubber Group, Yunnan State Farms Group Co., Ltd, Guangdong Guangken Rubber Group Co., Ltd., etc. are the top Chinese suppliers of natural rubber, of which, Sinochem International Corporation and Hainan Rubber Group are the only two listed companies in Chinese natural rubber industry. With the support of favorable policies, major domestic enterprises are implementing the development strategy of “Going out” to speed up the layout of overseas operations.
After acquiring GMG (a Singapore-listed company) in 2008, Sinochem International Corporation got new natural rubber capacity of 200,000 tons through joint venture with Thailand’s rubber giant Teck Bee Hang Co., Ltd via GMG in 2010; then in 2011, Sinochem’s new capacity in Africa reached 50,000 tons; in 2012, the subsidiary GMG Global LTD planned to contribute €193 million to obtain a 35% stake of Belgium-based SIAT NV, thereby further improving the global layout of its rubber industry chain.

Currently, Hainan Rubber Group operates natural rubber business mainly at home, while its overseas business is lagged relatively behindhand. In September 2009, the founding of Hainan Rubber Group (Singapore) Development Pte Ltd marked the Group’s first step to go abroad.

By the end of 2011, Yunnan State Farms Group had set up 16 rubber planting bases in four provinces and nine counties of Laos, cultivated 84,100 mu (1 mu = 1/15 hectare) of rubber by way of cooperation in Myanmar as well as planned to complete overseas demonstration cultivation of one million mu of natural rubber in 2012.

Since it started to develop business overseas in 2004, Guangdong Guangken Rubber Group had successively acquired or established seven overseas companies in Thailand, Malaysia and other countries, as well as built 52,000 mu of overseas rubber plantation as of end-2011, with natural rubber capacity up to 350,000 tons or so.

**Global and China Natural Rubber Industry Report, 2012 by ResearchInChina** mainly covers the followings:

- Supply / demand analysis, geographical distribution, price analysis, etc. of the global natural rubber industry;
- Supply / demand analysis, product structure, geographical distribution, import / export analysis, competitive landscape, development tendency, etc. of natural rubber in China;
- Development status, development strategy, etc. of upstream / downstream sectors of China’s natural rubber industry.
- Operation, natural rubber business analysis and development of eight global and Chinese natural rubber manufacturers.
1. Natural Rubber
1.1 Definition
1.2 Classification

2. Development of Global Natural Rubber Market
2.1 Status Quo
2.2 Demand
2.3 Supply
2.4 Price

3. Development of Chinese Natural Rubber Market
3.1 Status Quo
3.2 Product Structure
3.3 Regional Structure
3.4 Supply
3.5 Demand
3.6 Import & Export
3.6.1 Import
3.6.2 Export
3.7 Competition
3.8 Development Outlook

4. Global and China Natural Rubber-related Industries and Their Influence
4.1 Upstream
4.2 Downstream

5. Key Global Players
5.1 Sri Trang
5.1.1 Profile
5.1.2 Operation
5.1.3 Revenue Structure
5.1.4 Gross Margin
5.1.5 Capacity and Output
5.2 Thai Rubber Latex Corporation (TRUBB)
5.2.1 Profile
5.2.2 Operation
5.2.3 Revenue Structure
5.2.4 Gross Margin
5.3 Thai Hua Rubber Public Company Ltd.
5.3.1 Profile
5.3.2 Capacity
5.4 Von Bundit Co., Ltd.

6. Major Chinese Companies
6.1 Hainan Rubber Group
6.1.1 Profile
6.1.2 Operation
6.1.3 Revenue Structure
6.1.4 Gross Margin
6.1.5 Investment
6.1.6 Clients and Suppliers
6.1.7 Capacity, Output & Sales Volume
6.2 Sinochem International Corporation
6.2.1 Profile
6.2.2 Operation
6.2.3 Revenue Structure
6.2.4 Gross Margin
6.2.5 Investment
6.2.6 Natural Rubber Business
6.3 Yunnan State Farms Group
6.3.1 Profile
6.3.2 Yunnan Natural Rubber Industrial Co., Ltd.
6.3.3 Xishuangbanna JingYang Rubber Co., Ltd.
6.3.4 Jiangcheng Rubber Company
6.3.5 Other Companies
6.4 Guangdong Guangken Rubber Group
6.4.1 Profile
6.4.2 Overseas Business
6.4.3 Investment in Natural Rubber Business

6.3.2 Yunnan Natural Rubber Industrial Co., Ltd.
6.3.3 Xishuangbanna JingYang Rubber Co., Ltd.
6.3.4 Jiangcheng Rubber Company
6.3.5 Other Companies
6.4 Guangdong Guangken Rubber Group
6.4.1 Profile
6.4.2 Overseas Business
6.4.3 Investment in Natural Rubber Business
• Properties of Natural Rubber
• Classification of Natural Rubber
• Global Demand for Natural Rubber, 2002-2012E
• Global Consumption of Natural Rubber by Country, 2009-2011
• Global Output of Natural Rubber, 2002-2012E
• Global Output of Natural Rubber by Country, 2011
• Natural Rubber Output of the World’s Five Major Producing Countries by Product, 2011
• Monthly Rising Probability of TOCOM and SHFE Natural Rubber Futures Prices
• Purchasing & Storage and Limited-price Policies on Natural Rubber, 2009-2012
• Natural Rubber Futures Prices in China, 2011-H1 2012
• Natural Rubber Capacity of Major Chinese Companies, 2011
• Import Volume of Natural Rubber in China by Product, 2011-2012
• Natural Rubber Output in China by Region, 2005-2011
• Natural Rubber Output and YoY Growth Rate in China, 2005-2011
• Natural Rubber Consumption and YoY Growth Rate in China, 2005-2011
• Import Volume and YoY Growth Rate of Natural Rubber in China, 2004-2012
• Import Volume of Natural Rubber in China by Country, 2007-2011
• Export Volume of Natural Rubber in China, 2003-2012
• Comparison of Key Chinese Natural Rubber Companies, 2011
• GDP and YoY Growth Rate in China, 2008-2012
• The U.S. Dollar against RMB Central Parity, 2011-2012
• Import Tariff Policies on Natural Rubber in China, 2006-2012
• Total Area of New Planting & Replanting of the World’s Nine Largest Natural Rubber Producing Countries, 2003-2012E
• New Planting & Replanting Area of the World’s Major Natural Rubber Producing Countries, 2003-2012E
• Stoppage Periods of the World’s Major Natural Rubber Producing Countries
Global Natural Rubber Consumption by Application
Cost Structure of Tire Enterprises by Raw Materials
Output and YoY Growth Rate of Rubber Tire in China, 2008-2012
Automobile Sales Volume and YoY Growth Rate in China, 2006-2012
Automobile Output and YoY Growth Rate in China, 2006-2012
Revenue and YoY Growth Rate of Rubber Hose-related Manufacturers in China, 2003-2012
Gross Margins of Rubber Hose Manufacturers in China, 2006-2012
Performance of Popular Rubber Products
Output and Apparent Consumption of Synthetic Rubber in China, 2003-2011
Demand for Downstream Rubber Products in China, 2015E
Natural Rubber Industry Chain of Sri Trang
Significant Events in the Development of Sri Trang, 1987-2011
Revenue and YoY Growth Rate of Sri Trang, 2007-2011
Net Income and YoY Growth Rate of Sri Trang, 2007-2011
Revenue of Sri Trang by Product, 2011
Natural Rubber Revenue of Sri Trang by Region, 2011
Gross Margin of Sri Trang by Product, 2010-2011
Natural Rubber Sales Volume of Sri Trang by Product, 2010-2011
Strategic Planning of Sri Trang
Holding Subsidiaries of TRUBB
Revenue and YoY Growth Rate of TRUBB, 2008-2011
Net Income and YoY Growth Rate of TRUBB, 2008-2011
Subsidiaries of TRUBB by Business, 2009-2011
• Revenue of TRUBB by Business, 2009-2011
• Natural Rubber Revenue of TRUBB by Region, 2010-2011
• Gross Margin of TRUBB, 2009-2011
• Factories and Capacity of Thai Hua Rubber Public Company Ltd.
• Natural Rubber Capacity of Thai Hua Rubber Public Company Ltd. by Product
• Natural Rubber Capacity of Von Bundit by Product
• Distribution of Von Bundit’s Factories
• Distribution of Von Bundit’s Affiliated Companies
• Corporate Structure of Hainan Rubber Group
• Revenue and Net Income of Hainan Rubber Group, 2007-2012
• Sales Model of Hainan Rubber Group
• Revenue of Hainan Rubber Group by Product, 2010-2011
• Revenue of Hainan Rubber Group by Region, 2010-2011
• Gross Margin of Hainan Rubber Group by Product, 2007-2011
• Projects under Construction of Hainan Rubber Group, 2011
• Name List and Revenue Contribution of Hainan Rubber Group’s Top 5 Clients, 2011
• Natural Rubber Output of Hainan Rubber Group, 2007-2011
• Sales Volume and YoY Growth Rate of Hainan Rubber Group, 2007-2011
• Revenue and YoY Growth Rate of Sinochem International Corporation, 2007-2012
• Net Income and YoY Growth Rate of Sinochem International Corporation, 2007-2012
• Revenue of Sinochem International Corporation by Business, 2007-2011
• Revenue of Sinochem International Corporation by Business, 2011
• Gross Margin of Sinochem International Corporation by Business, 2007-2011
• Investment Projects of Sinochem International Corporation, 2011
• Rubber Business-related Subsidiaries of Sinochem International Corporation, 2011
Selected Charts

- Overseas Subsidiaries of Guangdong Guangken Rubber Group, 2012
- Construction of Key Rubber Business Projects of Guangdong Guangken Rubber Group, 2011-2012
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