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 Company Reports, and National Bureau of Statistics of China etc.
Abstract

In recent years, the synthetic rubber capacity of China has seen rapid growth. As of late 2012, China’s capacity and output of synthetic rubber hit 3.904 million tons and 3.85 million tons (estimated), with producers numbering 23. Benefiting from self-contained raw material equipment, Sinopec Group and China National Petroleum Corporation are leading synthetic rubber producers in China, with the combined capacity accounting for 59.5% of the country’s total.

Due to robust domestic demand as well as favorable policies, private, foreign and Taiwanese enterprises are seizing Chinese synthetic rubber market. For example, in January 2012, the 100,000 t/a BR and 100,000 t/a SBR equipment built by Shandong Huamao Flamestop New-Material have both been put into service; in May 2012, the 30,000 t/a NBR equipment jointly invested by TSRC and Germany-based LANXESS in Chinese mainland was put into production, increasing the total production capability of synthetic rubber (including BR, SBR, NBR and SBS) of TSRC (with joint ventures included) to 302,000 t/a in Chinese mainland.

In addition, other projects including the 50,000 t/a nickel-based BR equipment of Shandong Junteng Synthetic Rubber, 100,000 t/a BR project of Zhejiang Transfer Synthetic Materials, and 100,000 t/a SSBR of Liaoning North Dynasol Synthetic Rubber are all expected to be put into production before 2015. The estimation shows that the new synthetic rubber capacity of China is projected to hit 2.239 million t/a by late 2015.


At present, BR and SBR are the synthetic rubber with the highest output in China, accounting for 19.5% and 33.0% of China’s total synthetic rubber output in 2011 respectively. However, NBR, IIR, EPR and other special rubber are heavily reliant on imports due to severe shortage of output as a result of restrictions in technologies and raw materials.
NBR: in 2012, the NBR capacity of China hit 209,000 t/a. PetroChina Lanzhou Petrochemical Company, one of the four producers, is the first largest NBR enterprise in China with the capacity hitting 69,000 t/a. During the 12th Five-Year plan period, several sets of NBR equipment are set to be put into production, including a 60,000 t/a NBR plant jointly invested by Jiangsu GPRO Group and INSA, a wholly-owned subsidiary of Mexico-based KUO Group, as well as a 50,000 t/a NBR equipment jointly built by Sinopec Group and Russia-based SIBUR in Shanghai.

IIR: in 2011, the IIR net import volume of China claimed 217,100 tons, nearly equivalent to 2.6 times of China’s output. In 2012, China had a total of three IIR producers, with the combined capacity realizing 200,000 t/a. According to the released information, the 50,000 t/a IIR project of CNOOC, 50,000 t/a IIR project of Formosa Plastic Group, 60,000 t/a IIR project of PetroChina Lanzhou Petrochemical Company, 60,000 t/a IIR project of PetroChina Daqing Petrochemical Company, 60,000 t/a IIR project of Tianjin Lugang Petroleum Rubber are all expected to be put into production in upcoming two or three years in succession. By then, the IIR self-sufficiency rate of China will further rise.

EPR: in 2011, the EPR output of China reported 19,000 tons, with the net import volume hitting 205,000 tons. As of late 2012, CNPC Jilin Petrochemical Company was the only EPR producer in China, with the capacity reached 45,000 t/a. Given the high value-added EPR products are expected to see great development potential in upcoming years, many international industrial players, including South Korea-based SK Group and Germany-based LANXESS are gluing their eyes on Chinese market to build EPR production equipment. It’s estimated that the EPR capacity of China by 2015 will hit 770,000 tons which is conductive to easing the domestic imbalance between supply and demand.

The report highlights:

- Supply & demand, import & export, regional distribution, product structure, competition pattern and development trend of China synthetic rubber industry;
- Supply & demand, import & export, competition pattern, price and development trend of China synthetic rubber market segments;
- Supply & demand, import & export, competition pattern, price and development trend of the upstream market of China synthetic rubber industry;
- Operation, business performance and development prospect of 22 Chinese synthetic rubber manufacturers.
1. Overview
1.1 Definition
1.2 Classification

2. Market Development
2.1 Global Development
2.2 Supply & Demand in Chinese Market
2.2.1 Supply
2.2.2 Demand
2.3 Import & Export in Chinese Market
2.3.1 Import
2.3.2 Export
2.4 Product Structure in Chinese Market
2.5 Regional Structure in Chinese Market
2.6 Competition Pattern in Chinese Market
2.7 Development Trend

3. Development of Key Market Segments in China
3.1 BR
3.1.1 Supply
3.1.2 Import & Export
3.1.3 Demand
3.1.4 Competition Pattern
3.1.5 Price
3.1.6 Development Trend
3.2 SBR
3.2.1 Supply
3.2.2 Import & Export
3.2.3 Demand
3.2.4 Competition Pattern
3.2.5 Price
3.2.6 Development Trend
3.3 EPR
3.3.1 Supply
3.3.2 Import & Export
3.3.3 Demand
3.3.4 Competition Pattern
3.3.5 Price
3.3.6 Development Trend
3.4 IIR
3.4.1 Supply
3.4.2 Import & Export
3.4.3 Demand
3.4.4 Competition Pattern
3.4.5 Price
3.4.6 Development Trend
3.5 NBR
3.5.1 Supply
3.5.2 Import & Export
3.5.3 Demand
3.5.4 Competition Pattern
3.5.5 Price
3.5.6 Development Trend

4. Upstream of China Synthetic Rubber
4.1 BD
4.1.1 Supply
4.1.2 Import & Export
4.1.3 Demand
4.1.4 Price
4.1.5 Competition Pattern
4.1.6 Development Trend
4.2 Styrene
4.2.1 Supply
4.2.2 Import & Export
4.2.3 Demand
4.2.4 Price
4.2.5 Competition Pattern
4.2.6 Development Trend

5. Key Chinese Synthetic Rubber Enterprises
5.1 China Petrochemical Corporation (Sinopec Group)
5.2 China National Petroleum Corporation (CNPC)
5.2.15 Development Prospect
5.3 Shandong Yuhuang Chemical
5.4 TSRC
5.5 YPC-GPRO (Nanjing) Rubber Co., Ltd. (YGC)
5.6 NANTEX Industry
5.7 Xinjiang Land Fine Petrochemical
5.8 Other Enterprises
Properties and Application of Synthetic Rubber by Variety
Synthetic Rubber Production Capability Worldwide by Region/Product, 2010
Synthetic Rubber Output Worldwide by Country/Region, 2007-2011
Synthetic Rubber Output and YoY Growth of China, 2006-2012
Apparent Consumption and Self-Sufficiency Rate of Synthetic Rubber in China, 2005-2012
Import Volume and YoY Growth of Synthetic Rubber in China, 2005-2012
Import Value and YoY Growth of Synthetic Rubber in China, 2005-2012
Export Volume and YoY Growth of Synthetic Rubber in China, 2005-2012
Proportion of Synthetic Rubber Output in China by Variety, 2007-2011
Synthetic Rubber Capacity of China by Product, 2012 & 2015
Proportion of Synthetic Rubber Output in China by Region, 2007-2012
Distribution of Synthetic Rubber Capacity in China by Enterprise, 2012
BR Capacity and YoY Growth in China, 2007-2015
BR Output and YoY Growth in China, 2007-2012
BR Import Volume of China by Shape, 2007-2012
BR Export Volume of China by Shape, 2007-2012
BR Apparent Consumption and Self-Sufficiency Rate in China, 2007-2012
Proportion of BR Demand in China by Application, 2011
BR Capacity in China by Enterprise, 2007-2015
Average Monthly Price of BR (First-Grade) in China, 2009-2012
SBR Capacity in China by Product, 2007-2015
SBR Output and YoY Growth in China, 2007-2011
SBR Import Volume and YoY Growth in China, 2007-2011
SBR Export Volume and YoY Growth in China, 2007-2011
SBR Apparent Consumption and Self-Sufficiency Rate in China, 2007-2011
Selected Charts

- Proportion of SBR Demand in China by Application, 2011
- Average Monthly Price of SBR (1500) in China, 2009-2012
- EPR Output and YoY Growth in China, 2007-2011
- EPR Import Volume and YoY Growth in China, 2005-2011
- EPR Export Volume and YoY Growth in China, 2007-2012
- EPR Apparent Consumption and Self-Sufficiency Rate in China, 2006-2011
- Proportion of EPR Demand in China by Application, 2012
- EPR Capacity Distribution in China by Enterprise, 2009-2015
- Average Monthly Price of EPDM (4045#) in China, 2009-2012
- IIR Output and YoY Growth in China, 2007-2011
- IIR Import Volume and YoY Growth in China, 2007-2011
- IIR Export Volume and YoY Growth in China, 2007-2011
- IIR Apparent Consumption and Self-Sufficiency Rate in China, 2007-2011
- Proportion of IIR Demand in China by Application, 2012
- IIR Capacity in China by Enterprise, 2011-2015
- Average Monthly Price of IIR (301) in China, 2009-2012
- NBR Output and YoY Growth in China, 2007-2011
- NBR Import Volume and YoY Growth in China, 2007-2011
- NBR Export Volume and YoY Growth in China, 2007-2011
- NBR Apparent Consumption and Self-Sufficiency Rate in China, 2007-2011
- NBR Capacity in China by Enterprise, 2010-2015
- Average Monthly Price of NBR (26/2707) in China, 2009-2012
- BD Output and YoY Growth in China, 2006-2012
- BD Import Volume and YoY Growth in China, 2006-2012
• Proportion of BD Import Volume in China by Country, 2012
• BD Export Volume and YoY Growth in China, 2006-2012
• BD Apparent Consumption and Self-Sufficiency Rate in China, 2006-2012
• Proportion of BD Demand in China by Application, 2012
• Average Monthly Price of BD in China, 2009-2012
• BD Capacity in China by Enterprise, 2010-2015
• Styrene Output and YoY Growth in China, 2006-2011
• Styrene Import Volume and YoY Growth in China, 2006-2012
• Styrene Export Volume and YoY Growth in China, 2006-2012
• Styrene Apparent Consumption and Self-Sufficiency Rate in China, 2006-2011
• Average Monthly Price of Styrene (First Grade, for Water Purification) in China, 2009-2012
• Styrene Capacity in China by Enterprise, 2010-2015
• Rubber Auxiliary Output and YoY Growth in China, 2009-2012
• Proportion of Rubber Auxiliary Demand in China by Application, 2012
• Average Price of Rubber Auxiliary in China by Product, 2009-2012
• Revenue and YoY Growth of Sinopec Group, 2007-2012
• Net Income and YoY Growth of Sinopec Group, 2007-2012
• Revenue of Sinopec Group by Industry, 2007-2012
• Gross Margin of Sinopec Group by Industry, 2007-2012
• Combined Revenue of Sinopec Group from Top 5 Clients and Proportions, 2007-2012
• Proportion of Top 5 Suppliers of Sinopec Group by Purchase Value and the Proportion of the Largest Supplier by Purchase Value, 2008-2011
• R&D Expenditures and Proportion of Sinopec Group, 2008-2012
• Synthetic Rubber Output and YoY Growth of Sinopec Group, 2007-2012
• Synthetic Rubber Sales Volume and YoY Growth of Sinopec Group, 2007-2012
• Synthetic Rubber Sales and YoY Growth of Sinopec Group, 2007-2012
Selected Charts

- Synthetic Rubber Output and YoY Growth of Sinopec Qilu Company, 2007-2012
- Revenue and Net Income and YoY Growth of Sinopec Group, 2011-2015
- Revenue and YoY Growth of China National Petroleum Corporation, 2007-2012
- Revenue of China National Petroleum Corporation by Industry, 2007-2012
- Revenue of China National Petroleum Corporation by Region, 2007-2012
- Combined Revenue of China National Petroleum Corporation from Top 5 Clients and Proportions, 2009-2012
- R&D Expenditures and Proportion of China National Petroleum Corporation, 2008-2012
- Synthetic Rubber Output and YoY Growth of China National Petroleum Corporation, 2007-2012
- Revenue of PetroChina Jilin Petrochemical Company, 2007-2011
- Revenue and Net Income and YoY Growth of China National Petroleum Corporation, 2010-2015
- Major Subsidiaries under Shandong Yuhuang Chemical, 2012
- Revenue and Net Income of Shandong Yuhuang Chemical, 2009-2012
- Revenue of Shandong Yuhuang Chemical by Industry, 2009-2012
- Gross Margin of Shandong Yuhuang Chemical by Business Division, 2009-2012
- Top 5 Suppliers, Purchase Amount and Proportion of Shandong Yuhuang Chemical from Synthetic Material Business Division, 2011-2012
- Top 5 Clients, Revenue Contribution and Proportion of Shandong Yuhuang Chemical from Synthetic Material Business Division, 2011-2012
- Synthetic Rubber Capacity, Output and Sales Volume of Shandong Yuhuang Chemical, 2010-2012
- Synthetic Rubber Sales and Average Price of Shandong Yuhuang Chemical, 2010-2012
- Projects under Construction or Planned to be Constructed by Shandong Yuhuang Chemical, 2010-2014
- Subsidiaries under TSRC, 2011
- Revenue and YoY Growth of TSRC, 2007-2012
- Gross Margin and YoY Growth of TSRC, 2007-2012
Selected Charts

- Revenue of TSRC on Chinese Mainland by Enterprise, 2009-2011
- Revenue and Proportion of TSRC by Product, 2009-2011
- Top 3 Suppliers, Purchase Value and Proportion of TSRC, 2009-2011
- R&D Expenditure and YoY Growth of TSRC, 2008-2012
- Synthetic Rubber Capacity, Output, Output Value and Capacity Utilization of TSRC, 2009-2011
- Synthetic Rubber Sales Volume of TSRC by Region, 2008-2011
- Revenue of TSRC from Synthetic Rubber Business by Region, 2008-2011
- Synthetic Rubber Capacity of TSRC by Enterprise/Product, 2012-2013
- Revenue, Gross Margin and YoY Growth of TSRC, 2010-2015
- Revenue of YPC-GPRO (Nanjing) Rubber Co., Ltd. (YGC), 2007-2008
- Major SBR Products of YPC-GPRO (Nanjing) Rubber Co., Ltd. (YGC)
- Revenue and YoY Growth of Nantex Industry, 2008-2012
- Revenue of Xinjiang Land Fine Petrochemical, 2009-2011
- CR Products of Shanxi Synthetic Rubber Group
- Synthetic Rubber Products of Zhechen Rubber
- Investment and Capacity of Tianjin Lugang Petroleum Rubber
- IIR Parameters of Zhejiang Cenway New Synthetic Materials
- CR Products of Changshou Chemical
- NBR Products of Ningbo Shunze Rubber by Grade, 2012
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