



**China Synthetic Rubber Industry Report,
2012-2015**

Jan. 2013

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

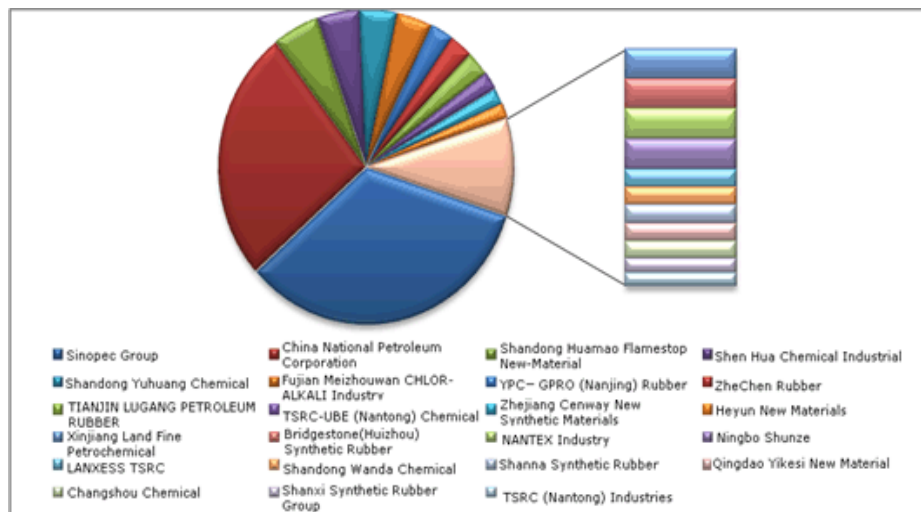
In recent years, the synthetic rubber capacity of China has seen rapid growth. As of late 2012, China's capacity and output of synthetic rubber hit 3.904 million tons and 3.85 million tons (estimated), with producers numbering 23. Benefiting from self-contained raw material equipment, Sinopec Group and 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.

Capacity of Synthetic Rubber of China by Enterprise, 2012



Source: ResearchInChina China Synthetic Rubber Industry Report, 2012-2015

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.

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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 conducive 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.

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