

China Synthetic Rubber Industry Report, 2013-2017

Jan. 2014

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

As a major synthetic rubber producer in the world, China's synthetic rubber capacity reached 4.98 million t/a in 2013, accounting for 27% of the global synthetic rubber capacity. Styrene butadiene rubber and polybutadiene rubber are China's major synthetic rubber, contributing 34.4% and 33.3% to the total capacity respectively in 2013. Chinese synthetic rubber giants Sinopec and CNPC occupied 52.4% of China's synthetic rubber capacity in 2013 together.

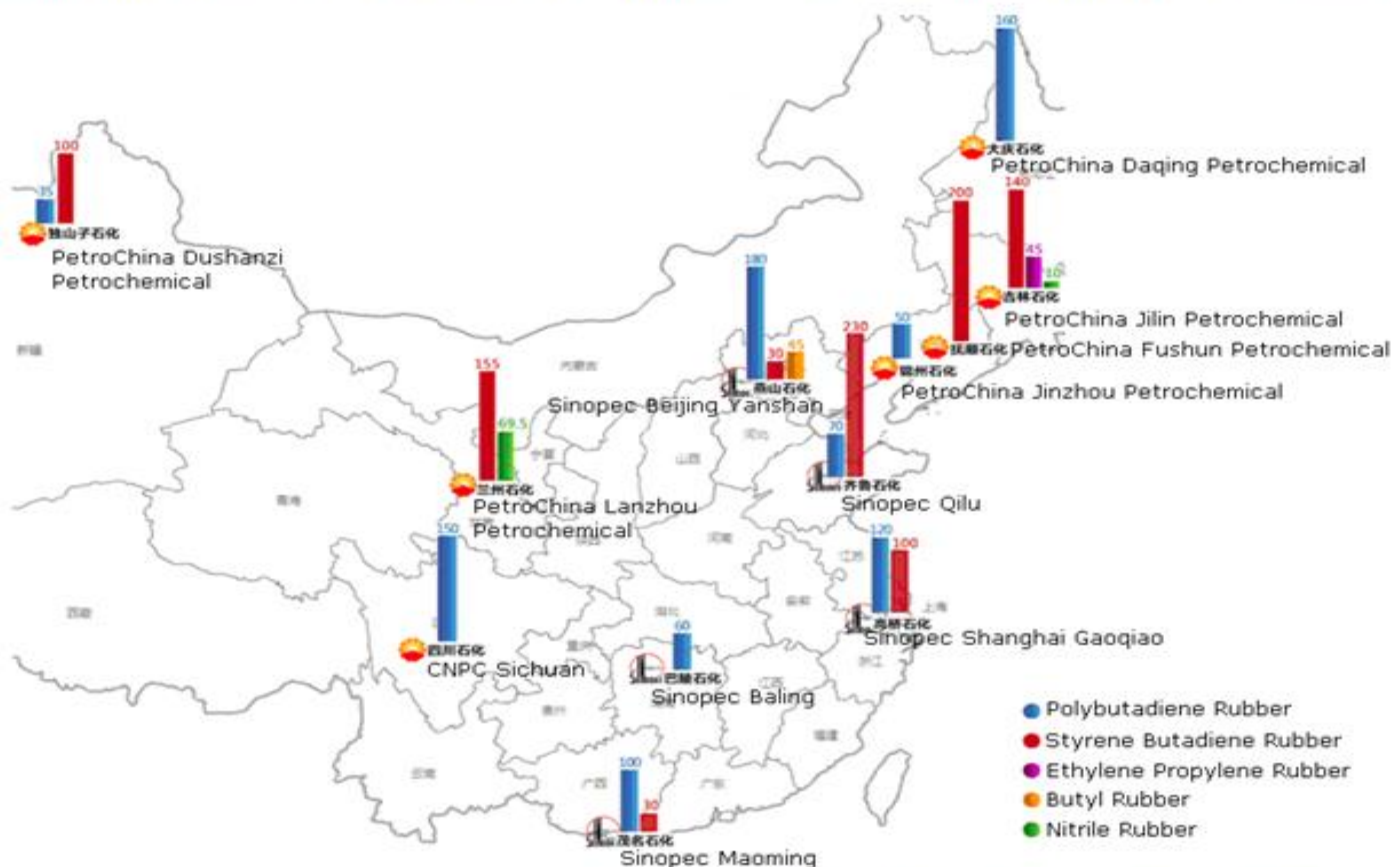
With the entry of Panjin Heyun, Liaoning Northern Dynasol, Germany Lanxess and other private or foreign-capital enterprises, the status of Sinopec and CNPC in the synthetic rubber industry will be by degrees weakened, and their combined share in China's synthetic rubber capacity will drop to 44.1% in 2017.

Styrene Butadiene Rubber: The capacity of the first segment in Chinese synthetic rubber market -- styrene butadiene rubber reached 1.715 million t/a in 2013, of which the emulsion styrene butadiene rubber capacity accounted for 79% of China's styrene butadiene rubber capacity..

China has been at a disadvantageous position in the global solution polymerized styrene butadiene rubber industry, but China will witness rapid expansion at the expected CAGR of 19.5% in 2013-2016 .

Polybutadiene Rubber: The capacity of the second segment in Chinese synthetic rubber market -- polybutadiene rubber hit 1.657 million t/a in 2013. At the end of 2013, China raised the polybutadiene rubber capacity by 540,000 tons/a, representing 62.8% of the new synthetic rubber capacity over the same period. Owing to the rapid release of polybutadiene rubber capacity in 2012 and 2013, China's polybutadiene rubber capacity utilization slumped and might be 51.7% in 2013. High-performance flat and tubeless radial tires will become an inevitable trend, so the demand for rare earth polybutadiene rubber will be huge. At the end of 2013, there had been five rare earth polybutadiene rubber manufacturers in China, namely Shandong Huayu Rubber, Sinopec Beijing Yanshan, PetroChina Dushanzi Petrochemical, PetroChina Jinzhou Petrochemical and Qi Xiang Tenda, with the combined capacity of 205,000 tons/a .

Capacity Distribution of Major Chinese Synthetic Rubber Manufacturers, 2013 (Unit: kt)



Source: Above Companies; ResearchInChina

Butyl Rubber: Halogenated butyl rubber is the development priority of Chinese manufacturers. In August 2013, the realization of Panjin Heyun's 30,000 tons/a halogenated butyl rubber project filled the gap of China tire brominated butyl rubber industry. Panjin Heyun also plans to accomplish the halogenated butyl rubber capacity of 180,000 tons/a in the next 3-5 years. Zhejiang Cenway's 50,000 tons/a halogenated butyl rubber equipment involved with China's first halogenated butyl rubber production technology with independent intellectual property rights is expected to be completed and put into operation at the end of 2014.

The report covers the followings:

- ✘ China's synthetic rubber capacity, output, consumption, import, export and development trend;
- ✘ Capacity, output, consumption, import & export, competition pattern, price and development trend of Chinese synthetic rubber products (Polybutadiene Rubber, Styrene Butadiene Rubber, Ethylene Propylene Rubber, and Butyl Rubber);
- ✘ Capacity, output, consumption, import & export, competition pattern, price and development trend of China's synthetic rubber upstream (Butadiene, Styrene, etc.);
- ✘ Status quo, synthetic rubber business and prospects of 18 major Chinese synthetic rubber manufacturers.

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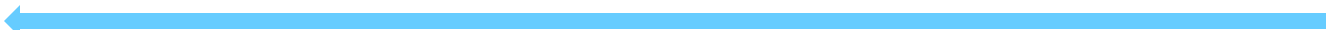
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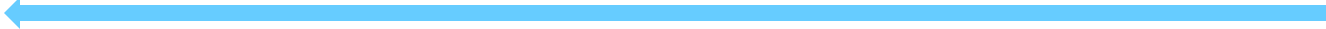
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