



**Global and China Natural Rubber Industry
Report , 2013-2016**

Apr. 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.

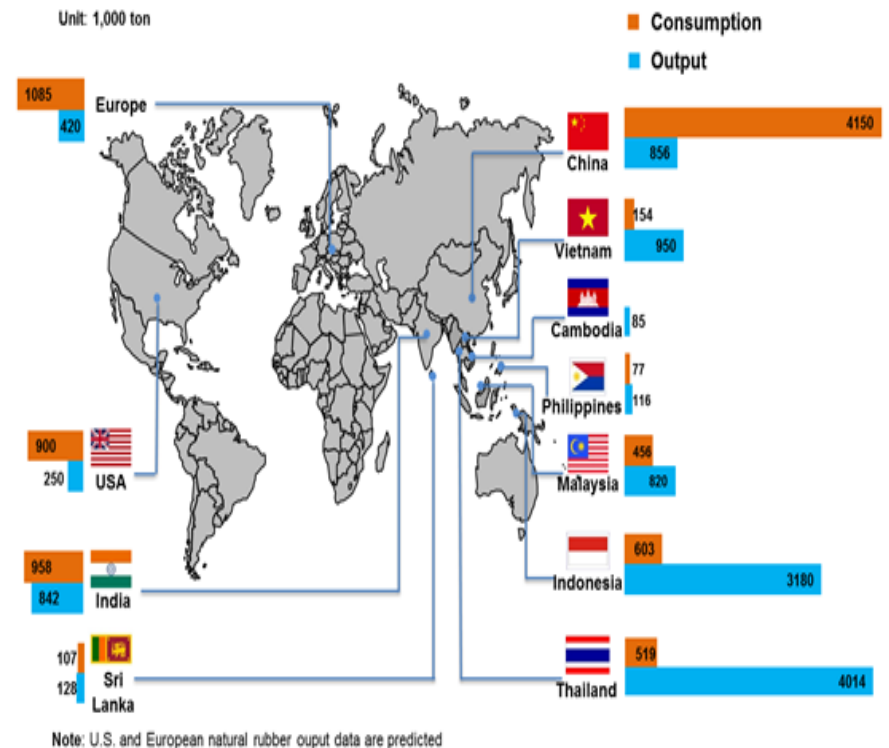
Abstract

Since 2011, global natural rubber market has remained oversupplied with surplus amounting to 220,000 tons in 2011, 410,000 tons in 2013 and expected to soar to about 540,000 tons in 2014. Affected by this, global natural rubber prices have been falling. In 2013, natural rubber futures prices in China plummeted by 41.2% over 2011, and is expected to continue to decline.

Currently, global natural rubber consumption markets are mainly concentrated in China, Europe, India and the United States, with the four countries and regions making up 59.6% of global natural rubber consumption in 2013. Among them, China was the largest consumer, reaching up to 4.156 million tons, or 34.9% of the world's total.

However, limited by planting region, climate and so on, global natural rubber production is primarily concentrated in Southeast Asia including Thailand, Indonesia and Vietnam and African countries. In relative terms, output of natural rubber in China is rather low, only 856,000 tons in 2013, or 7.3% of global total.

Natural Rubber Output and Consumption of Major Countries, 2013



Source: Global and China Natural Rubber Industry Report, 2013-2016 by ResearchInChina

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In recent years, China has been expanding rubber planting area. Rubber trees which were planted in 2005-2008 will be tapped in succession from 2014, and then output of natural rubber in China will increase dramatically, with the output expected to exceed 1 million tons in 2016.

Global and China Natural Rubber Industry Report, 2013-2016 by ResearchInChina highlights:

- ✘ Supply and Demand, Regional Distribution and Prices of Global Natural Rubber
- ✘ Supply and Demand, Import and Export and Competition Pattern of Natural Rubber in China
- ✘ Tapping Area and Planting Area of Natural Rubber in China and around the World
- ✘ Application of Natural Rubber in China, such as Tire, Rubber Belt and Rubber Hose
- ✘ Operation and Development in China of 4 Global Natural Rubber Companies
- ✘ Operation and Development Strategy of 5 Key Chinese Natural Rubber Companies

Sinochem International, China Hainan Rubber Industry Group, Guangdong Guangken Rubber Group and Yunnan State Farms Group are the leading Chinese natural rubber producers. Propelled by “going out” strategy for Chinese natural rubber companies, they have accelerated the expansion of overseas business.

Sinochem International Corporation is the largest provider with comprehensive operation in the field of natural rubber. The company, through acquisition and integration of natural rubber processing factories and plantations at home and abroad, has continued to expand its natural rubber business. As of the end of 2013, the company had 180,000 hectares of land for natural rubber, with processing capacity of 680,000 tons/a of rubber.

China Hainan Rubber Industry Group Co., Ltd. is a key natural rubber producer in China. By the end of 2013, the company had controlled 21 rubber factories in Hainan and Yunnan with combined processing capacity of 430,000 tons/a of natural rubber. In addition, following its acquisition of Singaporean rubber trading giant R1, the company established a joint venture in July 2013 in Sierra Leone, with the aim of planting 100,000 hectares of natural rubber and intending to build a natural rubber processing plant.

Guangdong Guangken Rubber Group Co., Ltd. began to expand its overseas business from 2004 and by the end of January 2014 the Group had 19 overseas projects, with total investment of RMB 8 billion and 3 million mu (1 hectare equals to 15 mu) of rubber planting area. If all projects can reach designed capacity on schedule, the company will be able to produce over 1 million tons of natural rubber annually.

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