



**Global and China Natural Rubber Industry
Report, 2014-2018**

Aug.2015

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

Due to substantial decline in global natural rubber prices, the world's natural rubber output fell by 1.5% from a year earlier to 12.07 million tons in 2014. Over the same period, global consumption of natural rubber saw a year-on-year growth of 6.8% to 12.16 million tons, destocking 89 kt, largely driven by continuous expansion of global tire industry.

Global natural rubber consumer markets are primarily concentrated in China, India, Europe, Japan, etc. China is the world's largest consumer of natural rubber, guzzling 4,760 kt in 2014, representing a year-on-year rise of 13.1%, making up 39.1% of the world's total consumption. Pulled by the demand from automobile and tire industries in China, natural rubber consumption will continue to grow and is expected to reach 6,791 kt by 2018.

However, limited by unfavorable weather conditions, the output of natural rubber in China is rather low, only 857 kt in 2014, or 7.1% of the global total. In order to meet supply-demand gap, China has to import a large amount of natural rubber from Thailand, Indonesia and Malaysia, with imports reaching 2,610 kt in 2014, 54.8% of total consumption that year.

At present, Sri Trang Agro-Industry Plc., Von Bundit and Thai Hua Rubber are major global natural rubber producers. They have, by virtue of their resource advantages, continued to boost planting and production capacity.

Von Bundit is the company with the largest natural rubber capacity in the world. It has production bases in Thailand, Singapore, etc. By the end of 2014, the company boasted annual capacity of 1,650 kt.

Sri Trang Agro-Industry Plc. is the world's second largest natural rubber producer. By the end of 2014, it had set up 26 plants in Thailand and Malaysia, totaling a capacity of 1,400 kt/a. The company's processing plant in Burma will go into production at the end of 2015, then adding natural rubber capacity of 100 kt/a. Meanwhile, major Chinese natural rubber producers, including Sinochem International, Guangdong Guangken Rubber Group and China Hainan Rubber Industry Group, are actively developing new products and speeding up the implementation of "going out" strategy.

Sinochem International Corporation is the largest supplier of natural rubber in China. By the end of 2014, the company had 23 processing plants in 8 main rubber producing countries with total annual capacity of 730 kt, including a capacity of 36 kt/a added in Africa.


China Hainan Rubber Industry Group Co., Ltd. is the largest natural rubber producer in China. As of the end of 2014, the company had the planting area of 3.53 million mu (1mu equals to about 1/15 hectare). In Jul 2015, the natural rubber material for domestic military aircraft tire jointly developed by the company and Shuguang Rubber Industry Research and Design Institute of China National Tire Rubber Corporation passed technical evaluation, breaking monopoly of imported high-end products in military aircraft tire in China.

Guangdong Guangken Rubber Group Co., Ltd. began to expand its overseas business from 2004. In May 2015, the company added 1,500 hectares of rubber planting area with operation period of 60 years, further expanding its natural rubber planting territory.

Global and China Natural Rubber Industry Report, 2014-2018 by ResearchInChina highlights:

- Supply & demand, regional distribution, prices, development trends of global natural rubber market;
- Supply & demand, import & export, competitive landscape, development trends of Chinese natural rubber market;
- Tapping area and planting area of natural rubber in China and around the world;
- Development of applications of natural rubber in China, such as rubber belt & hose;
- Operation and development in China of 5 global natural rubber companies;
- Operation and development strategy of 5 key Chinese natural rubber companies.

Capacity and Industrial Distribution of Major Chinese Natural Rubber Manufacturers, 2014

Company	Capacity(Kt/a)	Industrial Distribution
	730	The company mainly conducted layout in overseas markets, with a total land of 280,000 hectares in Africa and Southeast Asia, including arable area of 180,000 hectares; the company has 23 processing plants in Southeast Asia and Africa including China.
	578	The company has 23 rubber production bases in the provinces including Yunnan, Hainan, and Shandong, with a rubber planting area of 660,000 mu. It planned to expand the planting area to 1.5 million mu. There are 19 overseas projects under construction in Thailand, Cambodia, and Malaysia, with a total rubber planting area of 3 million mu.
	430	In Hainan, the company has 25 rubber production bases with a total planting area of 3.53 million mu, including 13 rubber processing plants, 1 seedlings branch; it has 6 processing plants in Yunnan.
	300	The company's rubber planting is mainly concentrated in Yunnan. Moreover, the company sped up the layout in Laos, Myanmar and other neighboring countries. In 2015, the company planned to process 275,000 tons of natural rubber, and to build 10 key natural rubber production demonstration areas.
	250	In Yunnan, the company has 6 processing plants; it has planted 8940 mu of rubber trees in Myanmar and Laos, is ready to continue to plant more rubber trees in Cambodia and Vietnam, which is expected to reach at least 150,000 mu in 2018.

Source: Global and China Natural Rubber Industry Report, 2014-2018; ResearchInChina

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