



Global and China Natural Rubber Industry Report, 2016-2020

Aug. 2016

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, the global natural rubber market has been in a state of oversupply which reached 220,000 tons in 2011 and about 140,000 tons in 2015. Affected by the growing tapping area of natural rubber in main producing regions, the slowdown in the growth rate of the tire industry and other factors, there will still be a glut of natural rubber worldwide during 2016-2020 and the global glut will be 110,000 tons or so in 2020.

Due to the sluggish global economic growth and the excess supply of natural rubber, the price of natural rubber has been hovering at a low level. As of the end of 2015, China's natural rubber price had fallen to around USD1,140 / ton which was also the cost price. In 2016, the global average price of natural rubber fluctuates at USD1,200-1,500 / ton.

In 2015, China's natural rubber output dropped 5.5% year on year to 794,200 tons. Weather factors confine China's natural rubber planting areas to a limited scope; plus the rubber price lingering on the cost line, more and more farmers have abandoned rubber production. In 2016, China's output of natural rubber is expected to further decline by 5.3% to 752,100 tons.

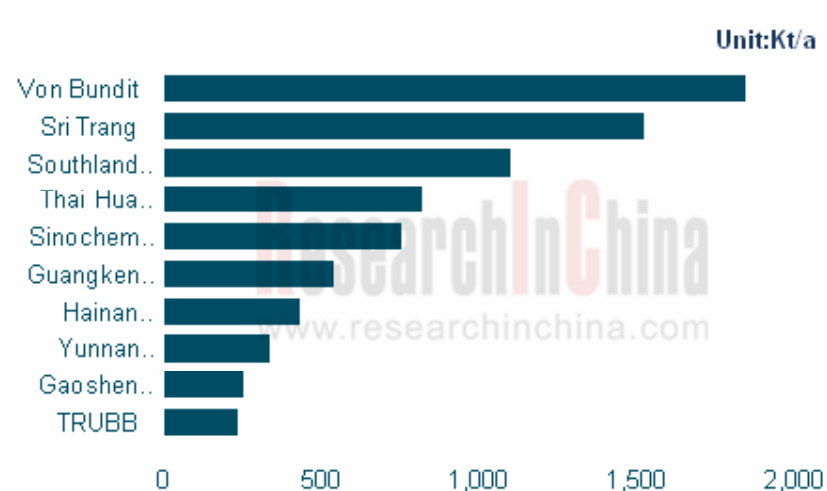
As the world's largest consumer, China consumed 4.682 million tons of natural rubber in 2015, accounting for 38.5% of the global total. Amid the serious imbalance between supply and demand, China mostly imports natural rubber to meet the additional demand. The import volume rose 4.8% year on year to 2.736 million tons, while the average import price fell 24.5% year on year to USD1,431.6 / ton in 2015.

In the backdrop of the descending rubber price and the downsized rubber plantations, China's automobile industry has been expanding in ownership and new increment, conducting to the ascending rigid demand of the tire industry and the growing demand for natural rubber. In 2016-2020, the contradiction between natural rubber supply and demand in China will further intensify; by 2020, the gap between supply and demand will hit about 5.142 million tons, an increase of 32.3% over 2015.

Restricted by resource distribution, the natural rubber industry is highly centralized in Thailand, Malaysia and other Southeast Asian nations, represented by the key players such as Sri Trang Agro-Industry, Von Bundit, Southland Rubber, Thai Rubber Latex and Sinochem International.

Given the downturn of the natural rubber market, companies can speed up the development of resources and strategies, increase the planting area in major producing countries as well as enhance processing factory layout to improve production capacity in the next years; on the other hand, they can keep an eye on customization and high-end market applications of natural rubber, such as military rubber tires, to heighten the gross margin and competitiveness of products.

Capacity of Major Global and Chinese Natural Rubber Producers, 2016



Source: ResearchInChina

Global and China Natural Rubber Industry Report, 2016-2020 by ResearchInChina highlights:

- ⇒ Supply & demand, regional distribution, prices, competitive landscape and development trends of global natural rubber market;
- ⇒ Supply & demand, import & export, regional structure, 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 tyre, rubber belt & hose;
- ⇒ Operation and development in China of 5 global natural rubber companies;
- ⇒ Operation and development strategies of 5 key Chinese natural rubber companies.

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