



China Synthetic Rubber Industry Report, 2017-2021

August 2017

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

Synthetic rubber is one of important strategic materials, mainly used in tyres and other industries. In 2016, the global output and consumption of synthetic rubber reached 14.822 million tons and 14.936 million tons, respectively, up 2.2% and 2.0% year on year. Driven by the steady development of automobile and tyre industries, the world's output and consumption of synthetic rubber are expected to hit 16.975 million tons and 17.725 million tons by 2021 respectively.

China, the world's largest producer of synthetic rubber, boasted the output of 5.458 million tons in 2016, accounting for 36.8% of the global output. China's synthetic rubber output is expected to grow at an average annual rate of 5.2% from 2017 to 2021 and reach 7.032 million tons in 2021, equivalent to 41.4% of the world's total output.

In 2016, the combined capacity of styrene butadiene rubber (SBR) and cis-polybutadiene rubber (BR) which are the two most popular products in China shared 60.1% of China's total capacity. Ethylene propylene rubber (EPR) and Isobutylene Isoprene Rubber (IIR) saw the fastest growth rates in the past five years, with the respective capacity CAGR of 69.5% and 37.7% during 2012-2016. With the continuous optimization of the rubber product (such as tyres) structure in China, the demand for solution polymerized styrene butadiene rubber (SSBR), halogenated butyl rubber (HIIR), neodymium polybutadiene rubber (Nd-BR), low cis-polybutadiene rubber (LCBR) and other environment-friendly rubber products will increase significantly in future.

In terms of prices, the rising price of the raw material butadiene and other factors spurred the explosive growth in the prices of China's major synthetic rubber products from 2016 to February 2017. Later, the synthetic rubber price fell with the lower butadiene price, but it may restore limited growth in fluctuations after July.

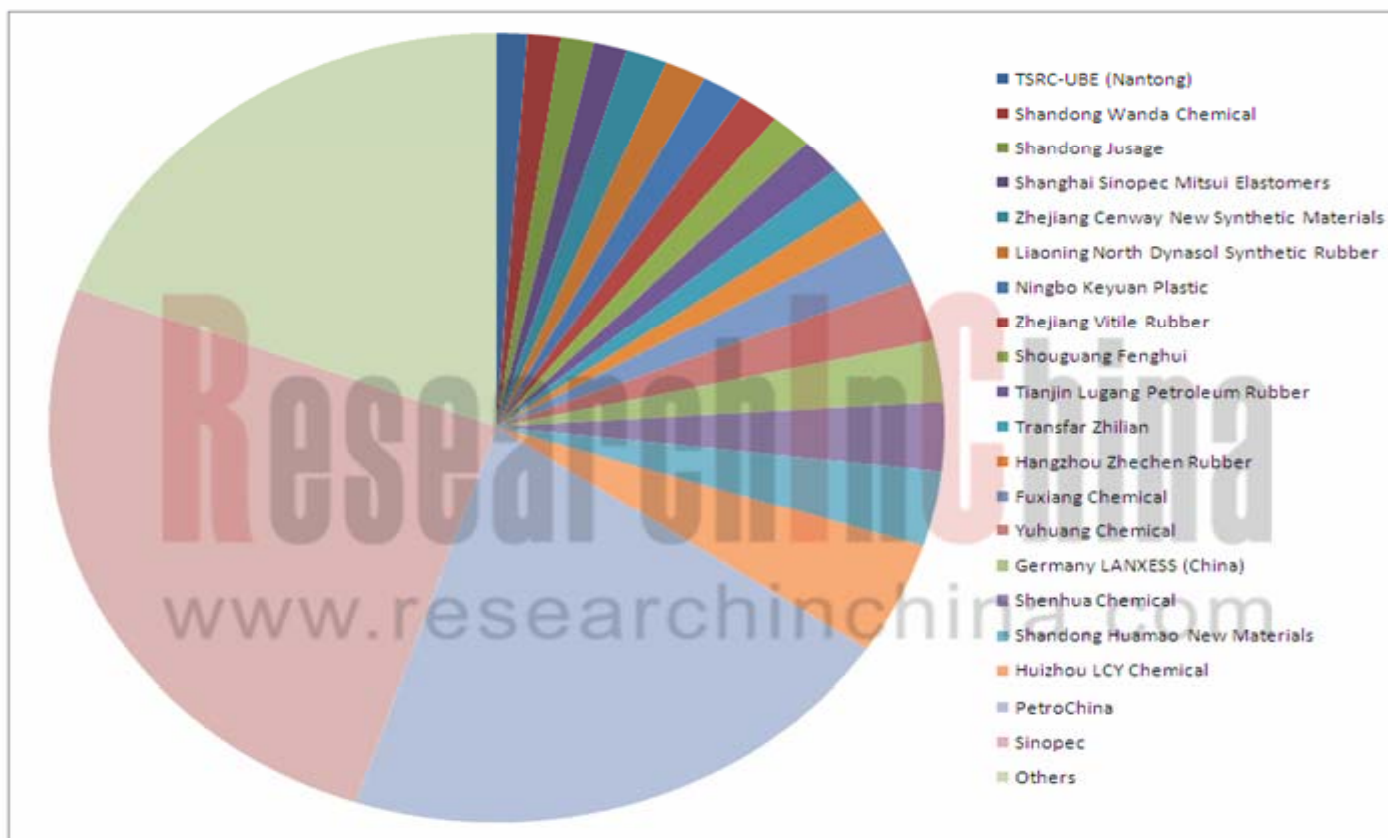
As for the enterprise pattern, there were more than 50 synthetic rubber manufacturers in China with the total capacity of 6.475 million t/a as of the end of 2016. Among them, the top two giants Sinopec and PetroChina contributed 46.2% to China's total synthetic rubber capacity together in 2016. In addition, Huizhou LCY Chemical, Shandong Huamao New Materials, Shenhua Chemical, Yuhuang Chemical, Germany LANXESS, TSRC-UBE and other Taiwanese, foreign and private companies have also entered the field.

As new entrants mostly focus on medium and low-end styrene butadiene rubber and cis-polybutadiene rubber (BR) products, China witnesses serious structural overcapacity of synthetic rubber with the release of new capacity. In the past two years, given the low prosperity index and depressed price of synthetic rubber as well as the tight supply of raw materials, some enterprises have sped up the reform of their product mix, while some other companies have shut down and dismantled facilities. In September 2016, Sinopec Shanghai Gaoqiao announced the removal of the 120,000 t/a cis-polybutadiene rubber (BR) plant which had run for many years; Yuhuang Chemical proclaimed the conversion of the 80,000 t/a cis-polybutadiene rubber (BR) facility into SBS facility. In the next few years, China's de-capacity trend will be more apparent and the new capacity will center on SBS and environment-friendly rubber.

The report covers the following:

- ◆ Supply and demand, product structure, regional structure, development trend, etc. of global synthetic rubber market;
- ◆ Supply and demand, import and export, product structure, regional structure, enterprise pattern, development trend, etc. of Chinese synthetic rubber market;
- ◆ Market supply and demand, import and export, enterprise pattern and other market situations of major Chinese synthetic rubber products (BR, SBR, IIR, EPR, NBR, etc.);
- ◆ Development of main raw materials of synthetic rubber (butadiene, styrene, rubber additive, etc.) in China;
- ◆ Development of global and China tyre (downstream sector of synthetic rubber) industry;
- ◆ Operation, development strategy, etc. of 21 major Chinese synthetic rubber manufacturers.

Capacity Distribution of China's Top 20 Synthetic Rubber Manufacturers, 2016



Source: China Synthetic Rubber Industry Report, 2017-2021 by ResearchInChina

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